Enterprise
EDITION

Magento Enterprise Edition

User Guide

Magento®

Revised, Expanded and Updated for V.1.14.1

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Enterprise
EDITION

Getting Started

Chapter 1:

Welcome to Magento!

Magento Enterprise Edition empowers you to create rich, differentiated consumer experiences that maximize revenue and help you achieve the highest levels of success. Here are a few ways it can help you drive revenue, and save time and money:

- Instant access to robust enterprise features. No other platform provides the variety of built-in tools and features, at any price point.
- Operate more efficiently. An intuitive platform that is easy to set-up, implement, and manage by non-technical resources—or even by yourself.
- Unparalleled flexibility and control. Whether you're refreshing your brand or scaling up your business, invest in a platform that integrates with your existing business systems to support your business as it grows.

Magento Enterprise Edition is the only eCommerce solution that delivers enterprise-class capabilities and performance at the most compelling lowest total cost of ownership, with flexibility and scalability to support your aggressive business goals.

Magento Enterprise Edition

System Requirements

For a standard installation, Magento Enterprise Edition ver. 1.14.1 requires the following:

SYSTEM REQUIREMENTS	
Environment	LAMP (Linux, Apache, MySQL, and PHP) or LNMP stack
Operating System	Linux x86-64
Web Server	Apache 2.x Nginx 1.7.x
Database	MySQL 5.6 (Oracle or Percona)
PHP	PHP 5.4 PHP 5.5
SSL	A valid security certificate is required for HTTPS. Self-signed certificates are not supported.
Supported Technologies	
Redis	Redis can be used for session or cache storage.
Memcached	Memcached can be used for session or cache storage.
Apache Solr	(Magento Enterprise Edition only) Can be used as an alternate search engine.

Visit our website for the System Requirements of previous releases.

Installation

Magento Enterprise Edition is typically installed by an IT department or independent professional. To find a qualified service provider, see our list of Solutions Partners.

To learn more about installing or upgrading Magento, see the "Upgrading Magento Enterprise" document that you received when you purchased Magento Enterprise Edition. For the most up-to-date information on updates, changes, new features, bug fixes, and other important information about each version of Magento Enterprise Edition, visit our website to view the Release Notes.

Resources

Magento provides a wealth of business and technical resources, self-help tools, and services to help you succeed. Our team is here to help you plan, build, and optimize your online channel.

Technical Resources

Whether you're a merchant, designer, developer, or all of the above, this is where you'll gain a deeper insight into how you can leverage the power of Magento to grow your business.

Knowledge Base

Got a question? The Magento Knowledge Base has an answer. Our Knowledge Base is full of helpful articles, how-to instructions, and reference material.

eBooks and Tips

You'll find practical and timely information in the selection of eBooks, articles and white papers that is available on our site.

Wiki

The Magento Wiki is where you can learn from others, and share what you know! To help you get started, we've gathered a list of articles that will help you on your way.

Forums

The Magento forums provide access to a network of dedicated Magento enthusiasts who share tips, tricks and support.

Blog

Check out the Magento blog for the latest information about new features, trends, best practices, upcoming events, and more!

Webinars

Expand your horizons! Register to attend the upcoming Magento webinar, or catch up on previous, archived webinars.

Help & Support

Our expert tech support team is here to help you with a wide variety of technical support issues, including basic design and store configuration.

Training & Certification

Magento has training courses for every role, including marketers, product managers, designers and developers. Magento U courses provide practical, hands-on exercises that help students learn quickly.

Partners

Need help to set up or fine-tune your store? Magento's certified developers and consultants are experts in store setup, design, integration and marketing. Find a certified expert and jumpstart your business today!

Expert Consulting Services

Magento's Expert Consulting Group (ECG) helps Magento Enterprise merchants and Solution Partners maximize their success. Our experts offer comprehensive analysis and best practice recommendations, from architecture planning through post-deployment.

Join the Conversation!

Facebook

Find out what's happening,
and join the discussion on our Facebook page!

Twitter

Follow us on Twitter
and hear the latest news!

YouTube

Learn while you watch videos
on our YouTube channel!

LinkedIn

Join the users group and
connect with others on LinkedIn!

Chapter 2:

Your Magento Account

You can find the information related to the products and services you have signed up to receive, as well as your contact and billing information in the dashboard of your Magento account. Your Magento account has a separate login from your store, and can be accessed from either the Magento website or from your store's Admin.

Your Magento Account

To log in to your Magento account:

1. Navigate to the Magento site: **http://www.magento.com**
2. In the upper-right corner, click the **My Account** link.
3. Enter your **First Name**, **Last Name**, **Email Address**. Then, take a moment to share the functions your company primarily performs, and your role.
4. Enter your **User Name** or **Email** , and **Password**. Then, click the **Submit** button. Your account dashboard appears.

Log In to Your Account

Sharing Your Account

Your Magento account contains information that can be useful to trusted employees and service providers who help to manage your site. As the primary account holder, you have authority to grant limited access to your account to other Magento account holders. For example, you may want to give someone the ability to open a support ticket on your behalf, or let that person download resources from your account.

Shared Account Access

When your account is shared, all sensitive information—such as your billing history or credit card information—remains protected. It is not shared at any time with other users.

> All actions taken by users with shared access to your account are your sole responsibility. Magento Inc. is not responsible for any actions taken by users to whom you grant shared account access.

To set up a shared account:

1. Before you begin, get the following information from the new user's Magento account:
   - Account ID
   - Email address
2. Log in to your **Magento account**.
3. In the My Account panel on the left, under Shared Access, click **Add New User**.
4. In the New User Information section, do the following:

- Enter the **Account ID** of the new user's Magento account.
- Enter the **Email address** that is associated with the new user's Magento account.

5. In the Shared Information section, do the following:

   a. Enter a **Sharename** to identify your shared account. Because the Sharename becomes an option in the Switch Accounts list, it should be something that the other person will recognize as your account.

   b. To share your personal contact information, select the checkbox for each item that you want to make available to the other person:

      - Your Email
      - Your Phone

6. In the Grant Account Permissions section, select the checkbox for each component of your account that you want to share.

7. When complete, click the **Create Shared Access** button.

   You are notified when the new role is saved, and the new user record appears in the Manage Users & Permissions section of the Shared Access page. The new user receives an invitation by email with instructions for accessing the shared account.

Add a New User

To access a shared account:

1. When you receive an invitation to a shared account, the first thing you must do is log in to your own Magento account.

   Your account dashboard has a new Switch Accounts listbox in the upper-right corner, with options for “My Account” and the name of the shared account.

2. To gain access to the shared account, set the **Switch Accounts** listbox to the name of the shared account.

   The shared account displays a welcome message and contact information. The left panel includes only the items that you have permission to use.

Switch Accounts

3. In the panel on the left, click **Support**.

   The Support page includes only the areas that you have permission to use. Depending on your permissions, you can create new support tickets, and view all previous activity.

4. In the panel on the left, click **Downloads**.The Downloads section provides access to product releases, patches, documentation,sample data, and tools.

5. When you are ready to return to your own account, simply **Switch Accounts** to “My Account.”

Notes

Chapter 3:

Quick Tour

This quick tour follows the customer-decision journey that leads to a purchase on an eCommerce site powered by Magento Enterprise Edition. Each item is linked to a topic in this guide, where you can learn more about the subject. You can also follow along on your computer with the sample data.

Free Demo

Storefront Demo

For the storefront example, we'll use Madison Island, a fictional fashion website that we created to highlight some of Magento's key features and functionality.

To sign up for a demo store:

1. On the Magento site, click the **Free Demo** button at the top of the page.
2. Complete the registration form, and click the **Send Request** button.

   You will receive your login instructions and credentials by email.

Madison Island Storefront

Demo Store Admin

As we walk through Magento Enterprise Edition, we'll switch between the storefront and the store Admin. To follow along with the quick tour, you can open one browser tab to the demo Magento store, and another to the store Admin. If your Admin access times out after a period of keyboard inactivity, simply log in again and you'll be back on track.

The Dashboard is the first page that appears when you log in to the Admin. It's a hub of important information about the health of your eCommerce site, and includes snapshots of Lifetime Sales, Average Orders, Top Search Terms, Best Sellers, Most Viewed Items, and more.

Demo Admin with Dashboard

To log in to the admin:

1. In the email you received, click the **URL** for the store Admin.
2. Enter your **User Name** and **Password**. Then, click the **Login** button.

Admin Login

Customer Journey

Attract New Customers

Magento Enterprise Edition includes SEO functionality out of the box. Improve your search ranking and attract the most visitors to your site.

Engage Your Customers

Design your site with predesigned templates, or create a custom design of your own, and give your customers tools to help them find what they want faster.

Increase AOV

Increase average order value with relevant, targeted promotions and product suggestions that encourage your customers to shop more.

Moment of Purchase

Give your customers a faster and easier way to check out. Calculate shipping and taxes automatically, and integrate multiple payment methods all on a single page.

Customer Retention

Create and manage newsletters, promotions, customer rewards to keep your customers coming back for more.

Loyalty & Advocacy

Encourage customers to write product reviews, create wishlists, and join customer rewards programs. This will strengthen your relationship with your customers, who in return, will speak positively of your business to friends and family.

Attract New Customers

Magento Enterprise Edition makes it easy to create a “search engine friendly” website to help the right customers find your store.

Search Engine Optimization

Magento offers powerful, native capabilities to streamline Search Engine Optimization (SEO) practices for content and site exposure that are integrated with the Admin, and tied directly into the user experience.

Custom URLs

Custom URLs are short, clean, and easy to remember. You can also autogenerate search-friendly URLs to streamline your purchase path.

Meta Data

Improve your search engine rankings by choosing specific criteria that helps search engines to find and index your products more easily. Meta data can be entered for product, category, and content pages.

Sitemap

Link to a sitemap from the footer of your store to give customers an overview of the catalog structure, with links to all categories and products in the store. You can also easily integrate your store with Google Sitemap.

Analytics

In addition to monitoring your site from the Admin dashboard, you can integrate third-party analytics tools such as Google Analytics, for detailed statistics on traffic and sales.

Engage Your Customers

Magento Enterprise Edition makes it easy to create a customized, engaging site experience. Encourage your customers to spend more time exploring your site, and give them the tools to make it easy to find what they want faster.

Content Management System

Magento's robust CMS software system makes it easy to store pages or parts of pages that you can use in your store. It's so intuitive that someone without a technology background can manage site content easily.

Design & Theme

Control the visual elements of your store with a collection of templates and skin files. You can apply these visual elements to all pages in your store, giving your store a cohesive look and feel.

Staging Environment

After you have designed or added new features to your site, test features and plug-ins before they go live on a password-protected private staging environment.

Multiple Stores, Sites & Views

Control the look and feel of multiple sites, introduce new market and languages, and track analytics from a single Admin. All without purchasing additional licenses.

Multiple Devices

Magento's powerful features make it easy to create storefronts optimized for iPhone, Android, and Mobile Opera browsers to help you engage consumers with mobile eCommerce now and into the future.

Rewards & Loyalty

Give your best customers VIP treatment. Offer exclusive access to Member Only sales or private sales to increase brand loyalty.

Gift Registries

Your customers can create gift registries for special occasions and send invitations to purchase items from the gift registry. Magento keeps track of all items purchased and the quantities remaining.

Private Sales

Private sales are a great way to leverage your customer base to generate buzz and new leads, or to offload surplus inventory. Create limited-time sale or a private sale for members only.

Shopping Tools

Your store includes a set of shopping tools that create opportunities for your customers to interact and share the experience with friends.

Sophisticated Search

Filter product by price, manufacturer, or any other criteria to reduce the time to purchase. Performance and search quality are improved with features like spelling, synonyms, stop words, and weighted attributes.

Increase Average Order Value (AOV)

Magento Enterprise Edition provides a range of merchandising tools and other tools to help you tailor the shopping experience to your customers. This encourages your customers to put more items in their shopping carts and to spend more money.

Targeted Promotions

Magento's rule-based engine lets you segment customers dynamically and build segments based on specific characteristics such as customer address, order history, shopping cart content, and much more.

Coupons

Create limited-time offers and coupons that customers can scan with their phone and apply to a purchase.

Product Suggestions

Another way to increase AOV is to cross-sell and upsell products related to customer searches. Manage specific product suggestions easily by using a condition-based tool to administer rules.

Email Reminders

Send automated reminder emails to customers who have added items to their carts or wishlists, but haven't made a purchase. A variety of triggers can launch automated emails, including total cart value, quantity, items in the cart, and more.

Full-Page Caching

Enhance performance by caching primary pages. Caching pages improves server response times, reduces load, and increases sustainable traffic.

You can use tags to define which components to cache, so only relevant pages are cached as updates take place. It also has the ability to identify and differentiate visitors from shoppers.

Sales Order Archiving

Archiving orders frees resources and improves performance when sales reps are assisting customers with orders.

User Permissions & Roles

Restrict access to data in the Admin on a "need to know" basis. Create multiple Admin roles with privileges for prices and promotions. Track and review all activity at a granular level for specific stores and websites.

Index Management

Automatic reindexing takes place whenever prices change, shopping carts are updated, or new categories created. Reindexing is a background process that does not interfere with store operations.

Moment of Purchase

Now that you've given your customer an engaging shopping experience, make it easy for them to complete their purchases. Magento helps you streamline the checkout process and boost conversion rates.

Order Processing

Magento supports a complete order processing workflow that makes it easy to track the status of orders and monitor communication between sales reps and customers.

Shipping Labels

Merchants have complete control over package characteristics such as weight and size. When creating shipping labels, shipping rate and barcode information originates directly from the shipping carrier and can be provided for single or multiple orders at once.

Multiple Shipping Options

Magento supports a variety of shipping methods so you can give your customers a choice at checkout. Customers can see a real-time estimate of shipping charges right from the shopping cart.

Multiple Payment Options

Magento Enterprise Edition supports the payment methods and currencies needed for global commerce. You can choose the ones you want to offer, and at checkout, your customers can choose the ones they prefer.

PayPal Merchant Solutions

It's easy to integrate a PayPal Payments account to provide your customers faster, more secure checkout options.

Payment Bridge

This secure payment application is PA-DSS compliant, and makes it easier to meet PCI compliance and to industry standards for security. Magento Secure Payment Bridge is installed separately from Magento Enterprise Edition.

Assisted Shopping

Assisted shopping makes it easy to create orders on behalf of customers. Customer service reps have access to shopping cart contents, and can move items from wishlists to the shopping cart, order by SKU, apply coupon codes, and more.

Security

Whether an order is fulfilled online or over the phone, Magento provides enterprise-level security and peace of mind. Magento offers CAPTCHA and SSL encryption, with best-in-breed encryption and hashing algorithms to protect the security of the system.

Customer Retention

Magento makes it easy for you to get repeat business and build brand loyalty. Magento gives you total control and flexibility over creating and revising goodies like rewards programs, custom coupons and automated emails to keep your customers coming back again and again.

RMA

Customers can submit requests for Return Merchandise Authorization from your store. You can create shipment orders in a carrier system, and print shipping labels with RMA numbers.

Store Credits

Keep customers loyal and happy by issuing refunds as store credits or virtual gift cards. This ensures that the money they spend stays with you and your merchandise.

Reward Points

Drive customer engagement with reward programs with award points based on a range of transactions and customer behaviors. Base redemption on a variety of factors, such as balance, customer history, and conversion rates.

Custom Coupons

Use customer segmentation to create coupons for use on—or off—your site. Create coupons for social media or email campaigns. You can also create unique coupon codes, and design them the way you like.

Newsletters

Stay in touch with current customers who have opted to receive newsletters. You can create as many newsletter templates as you want.

Target Shopping History

Encourage customers to make return purchases with targeted promotions based on their shopping history. With the Magento platform, you can easily build segments based on your customer base.

Loyalty & Advocacy

Give customers a direct connection to your brand by allowing them to create customer accounts where they can see their purchase history, rewards, store credits, and newsletters. Make it easy for customers to create wishlists and guest registries to attract new customers. Use ratings and reviews to give new customers objective product opinions and return customers a sense of community. These features turn customer satisfaction into one of the most powerful and cost-efficient marketing tools at your disposal.

Dashboard Snapshots

Knowing what's of interest on your site is crucial to maximize your marketing budget. Use this information to determine what you should cross- and up-sell to loyal customers, or which products to put on sale.

Customer Accounts

Opening as account provides customers with a personalized shopping experience that they can share with their friends. Customers can save their shopping preferences, and manage their own store billing and shipping information.

Advocacy Tools

Customers who share wishlists and gift registries with family and friends are making a powerful endorsement of your brand. Customers create these personalized lists from products they choose. When shared by email or RSS feed, these simple lists are powerful advocacy tools.

Reviews & Ratings

Product reviews give your customers a way to engage with your brand while fostering a sense of community. You can curate your reviews with tools to help you edit and approve comments for inappropriate content before they go live.

Success!

Opening your Magento store for business requires your attention in the following areas. While there are virtually any number of customizations you can make to the storefront and Admin, you can use each link in this is list as a place to start.

Implementation

If you need help setting up your store, you can choose from our vast network of Magento Solutions Partners.

Design

You can design your own home page or work with an experienced Magento designer or Solutions Partner to customize your site.

Product Catalog

Configure products, create categories, import existing product catalogs, and leverage APIs or third-party data management solutions.

Payment Methods

Magento supports a wide variety of payment methods, services, and gateways that you can offer for your customers' convenience.

Shipping Methods

Magento shipping methods are easy to set up and give you the ability to connect with carriers who can ship your products all over the world.

Taxes

Manage your taxes with our native tools, or add third-party extensions from Magento Connect.

Thanks for your order!

Magento can help you build relationships with your customers, to bring them back to your store, again and again.

Enterprise
EDITION

Basic Configuration

Chapter 4:

Store Admin

Your store Admin is the password-protected back office where you can set up products, promotions, manage orders, and perform other administrative tasks. This chapter provides a high-level overview of the management tasks that you can perform while running your store on a day-to-day basis.

Store Admin

Admin Login

All of the basic configuration tasks are performed in the Magento backend, which is referred to in this guide as your store Admin.

Admin Login

To log in to your store admin:

1. For a new Magento installation, do the following:
   a. On the last page of the Magento Installation Wizard, click the **Go to Backend** button.
   b. In the address bar of your browser, enter the URL that you specified in the Magento Installation Wizard, followed by the "/admin" suffix. If you specified a different suffix for the Admin during the installation, use that instead. Most Admin URLs looks like this:

      http://www.mystore.com/admin
2. To use the Magento EE Demo Store, enter the following URL:

   http://enterprise-admin.user.magentotrial.com/admin/

   > You can bookmark the Admin Login page for easy access.
3. Do one of the following:
   - Enter the **User Name** and **Password** that was specified during the Magento installation.
   - If you are using the Magento EE Demo Store, use the following login credentials:

     User Name: **admin**

     Password: **123123a**
4. Click the **Login** button.

Message Inbox

Your store has an inbox for the messages received from Magento. The messages are rated by importance, and might refer to updates, patches, new releases, scheduled maintenance, upcoming events, and more. Any message that is considered to be of major importance appears in a pop-up window when you log into your store. You can manage your message inbox much as you would manage your email. Check it often to stay up-to-date on the latest information from Magento!

Incoming Message

To manage incoming messages:

1. When the Incoming Messages box appears, do one of the following:
   - Click the **Read Details** link for more information.
   - Click the **Close** box to remove the popup and continue.

   A Latest Message notice also appears to the left, just below the header of your store. As with the popup box, you can click the **Read Details** link for more information.

Message Notifications Below Header

2. To read your messages, click **Go to messages inbox**.

   The messages in your inbox are marked by severity, with the most recent at the top.

3. After reading a message, you can apply any of the following actions to the message:

   - For more information, click the **Read Details** link.
   - To keep the message, click the **Mark As Read** link.
   - To delete the message from your inbox, click the **Remove** link.

Messages Inbox

To apply an action to multiple messages:

1. On the Admin menu, select **System > Notifications**.

2. In your message inbox, do one of the following:

   - Select the checkbox at the beginning of each message you want to manage.
   - Click one of the group selection options above the list to select multiple messages.

3. When the messages that you want to manage are selected, set **Actions** to one of the following:
   - Mark as Read
   - Remove
4. Click the **Submit** button to complete the process.

Messages Inbox

Message Importance

SEVERITY	COLOR	DESCRIPTION
Critical	Red	Indicates an important, time-sensitive message.
Major	Orange	The default message severity level.
Notice	Green	Indicates that a routine operation has taken place.

Admin Menu

All of the tools you need to manage the operation and maintenance of your store are available in the admin menu.

Dashboard

The Dashboard gives you a quick overview of the sales and customer activity in your store. It is usually the first page that appears when you log in to the admin.

Sales

The Sales menu is where you can find everything related to processing an order, including current and past orders, invoices, shipments, credit memos, terms and conditions, and taxes.

Catalog

The Catalog menu controls everything related to your product catalog, including products, categories, attributes, URL rewrites, search terms and indexing, product reviews, tags, and Google Sitemap.

Mobile

The Mobile menu is where you can configure the templates, content, and apps for various mobile devices and store views.

Customers

The Customers menu is where you can manage customer accounts, groups and segments, invitations to events, gift registries, gift cards, and rewards. You can even see which customers are online at the moment.

Promotions

The Promotions menu is where you set up catalog and shopping cart price rules, coupons, promotional banners, and automated email reminder rules. Rules trigger actions when conditions are met.

Newsletter

The Newsletter menu contains the tools you need to publish newsletters and manage your list of subscribers.

CMS

The CMS menu is where you create and manage content for your store. You can even create a hierarchy of pages with version control and navigation. Other types of content you can create include static blocks, banners, “widgets,” and polls.

Reports

The Reports menu provides a broad selection of reports that give you insight into every aspect of your store, including sales, shopping cart, invitations, products, customers, tags, reviews, and search terms.

System

The System menu includes tools to configure and maintain every aspect of your store. In addition, you can install extensions and manage Web Services for integration with other applications.

Admin Tools

The Admin includes many lists of data for products, orders, customers, search terms, pages, blocks, banners, and so on. Each list has the same set of tools for finding records, pagination, sorting, filtering, selecting, and applying actions to records.

Global Search

The Global Search box can be used to find any value in the database, including product, customer, and order records.

Sorting

The header of each column can be used to sort the list in ascending or descending order.

Filters

The filters in the header of each column can be used to limit the list to specific values. Some filters have additional options that can be selected from a list box, and for others, you can simply type the value you want to find.

Pagination

The pagination controls are used to view the additional pages of results.

Selection

The Selection controls above the column headers have links to Select All, Unselect All, Select Visible, and Unselect Visible

Actions

The Action control applies an operation to any record with a checkmark in the first column.

Global Record Search

The global search box is located in the Admin header, and can be used to find any record in the database. The results can include customers, products, orders, or any related attribute.

Global Record Search

To search records globally:

1. Type the first few letters of what you are looking for into the global search box.
2. In the list of closely matching items, click the one that you want to find.

List Controls

Many pages in the Admin have a list of records that is displayed in a grid, with controls at the top of each column. The controls can be used to sort the list in ascending, or descending order, based on the values in the column. In addition, you can enter a value at the top of the column to filter the list.

Sort Controls

To sort a list:

1. In the upper-left corner, set **Choose the Store View** to the define the scope of the data to be retrieved.
2. Click the column name of any header. The arrow indicates the current order as either ascending or descending.
3. Use the pagination controls to view additional pages in the collection.

To set the pagination controls:

1. Set **View** to the number of records that you want to view per page.
2. In the **Page** box, enter the page number you want to view, or click the arrow button to advance to the next or previous, page.

Pagination Controls

To filter the data:

1. In the box below the column header, either enter or select the value you want to find.
2. Click the **Search** button.

Filter Controls

Actions Control

When working with lists of data, you can use the Actions control to apply an operation to a single record, or to multiple records. The Actions control lists the operations that can be applied to the selected records. For example, while working in the Manage Products list, you can select multiple products, and use the Actions control to change their status from "Disabled" to "Enabled," update attributes, or delete them from the database.

The selection of available actions varies by list, and the action selected. For example, when changing the status of a group of records, a Status box with additional options appears next to the Actions control.

Applying an Action to Selected Records

Step 1: Select Records

The checkbox in the first column identifies each record that is a target for the action. The search filters can be used to narrow the list to the records you want to target for the action. Do the following:

1. Select the checkbox of each record that is targeted for the action. Or, uise the selection links above the list to the left, to select groups of records. Options include:
   - Select All / Unselect All
   - Select Visible / Unselect Visible
2. If needed, set the search filters at the top of the columns to list the records you want to include.
3. In the first column, set the checkbox state to list "Any" record, or only those that match, or do not match the filter settings.

Step 2: Apply an Action to Selected Records

1. Set the **Actions** control to the operation you want to apply.

Example: Update Attributes

1. In the list, select the checkbox of each record to be updated.
2. Set the **Actions** control to "Update Attributes," and click the **Submit** button.

   The Update Attributes page lists all the available attributes, organized by group in the panel on the left.

Update Attributes

3. Select the **Change** checkbox next to each attribute, and make the necessary changes.
4. Click the **Save** button to update the attributes for the group of selected records.
5. Click the **Submit** button.

Checkbox States

STATE	DESCRIPTION
Any	Lists all records, regardless of checkbox status.
Yes	Lists only records with the checkbox selected.
No	Lists only records without the checkbox selected.

Actions by List

LIST	ACTIONS
Sales	
Orders	Cancel Hold Unhold Print Invoices Print Packingslips Print Credit Memos Print All Print Shipping Labels Move to Archive
Shipments	PDF Packing Slips Print Shipping Labels
Invoices	PDF Invoices
Manage RMA	Close
Search Terms	Delete
Credit Memos	PDF Credit Memos
Manage Gift Wrapping	Delete Change Status
Catalog	
Manage Products	Delete Change Status Update Attributes
Search Terms	Delete
Manage Tags	Delete Change Status
Reviews (All / Pending)	Delete Update Status
Tags (All / Pending)	Delete Change Status

LIST	ACTIONS
Mobile	
Message Queue	Delete Cancel
Customers	
Manage Customers	Delete Subscribe to Newsletter Unsubscribe from Newsletter Assign a Customer Group
Manage Invitations	Discard Selected Send Selected
Manage Gift Card Accounts	Delete
Newsletter	
Newsletter Subscribers	Unsubscribe Delete
CMS	
Manage Banners	Delete

Chapter 5:

Store Information

The basic information for your store includes the store name and address, telephone number and email address, that appear on email messages, invoices, and other communications sent to your customers. In this chapter , you will configure the following information:

- Store Locale
- Countries Options
- State Options
- Shipping Settings
- Store Email Addresses
- Contact Us

Locale Options

The locale determines the language, country, tax rate, and other settings used throughout a store. The locale options configure the time zone and language of each store, and identify the days of your work week in the area.

Locale Options

To set the locale of a store:

1. On the Admin menu, select **System > Configuration**.
2. Click to expand the **Locale Options** section.
3. Select your **Timezone** from the list. Then, do the following:
   a. Set **Locale** to the store language.
   b. Set **First Day of the Week** to the day that is considered to be the first day of the week in your area.
   c. In the **Weekend Days** list, select the days which fall on a weekend in your area. (To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.)
4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Timezone	Website	Identifies the time zone of the primary market served by the store. Usually the timezone is the same as that used in the physical location of your business.
Locale	Store View	Identifies the language, currency, and system of measurement used in the market served.
First Day of Week	Store View	Identifies the day that is considered to be the first day of the week in the market served.
Weekend Days	Store View	Identifies the days that fall on the weekend in the market served.

State Options

In many countries, the state, province, or region is a required part of a postal address. The information is used for shipping and billing information, to calculate tax rates, and so on. For countries where it is not required, the field can be omitted entirely from the address, or included as an optional field.

Because standard address formats vary from one country to another, you can also edit the address template that determines how the information appears on invoices, packing slips, and shipping labels.

States Options

To set up the state options:

1. On the Admin menu, select **System > Configuration**.
2. Click to expand the **States Options** section, and do the following:
3. In the **State is required for** list, select each country where you want State / Province to be a required entry. To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.
4. Set **Display not required State** to one of the following:

Yes	In countries where the state field is not required, the field is included in the form as an optional entry.
No	In countries where the state field is not required, the field is omitted from the form.

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
State is required for	Global	Identifies the countries where you conduct business that do not require a state or province to be included in a postal address.
Display not required State	Global	For countries where it is not required, determines if the State/Province field is included in the postal address of the customer. Options include: Yes — Includes the State/Province field in the customer address, even if not required by the country. No — Omits the State/Province field from the customer address if not required by the country.

Countries Options

The Countries Options establish the country where your business is located, and the countries from which you accept payment.

Countries Options

To set the country options for your store:

1. From the Admin menu, select **System > Configuration**.
2. Click to expand the **Countries Options** section. Then, do the following:
   a. Set **Default Country** to the country where your business is located.
   b. In the **Allow Countries** list, select each country from which you accept orders. By default, all countries in the list are selected. To select multiple countries, hold down the Ctrl (PC) or Command (Mac) key.
   c. In the **Postal Code is Optional** list, select each country where you conduct business that does not require a ZIP or postal code to be included as part of the street address.
   d. In the **European Union Countries** list, select each country in the EU where you conduct business. By default, all EU countries are selected.
3. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Default Country	Store View	Identifies the country where your store is located.
Allow Countries	Store View	Identifies each country from which you accept orders.
Postal Code is Optional for the following countries	Global	Identifies the countries that do not require a ZIP or postal code in the shipping address.
European Union Countries	Global	Identifies the countries that are members of the European Union.

Currency Setup

Magento Enterprise gives you the ability to accept currencies that are used in more than two hundred countries around the world. In addition to choosing the currencies that you accept, you can also manage currency rates for the store. If you accept payment in multiple currencies, make sure to monitor the currency rate settings, because any fluctuation can affect your profit margin. Currency rates can be set manually, or imported into the store. Currency symbols are used throughout the store, and appear in product prices and sales documents such as orders and invoices.

Before you can set currency rates, you must first specify the currencies that you accept, and which currency is used to display prices in your store. You can customize the currency symbols as needed, and also set the price display separately for each store or view.

Currency Options

To set up currency for your store:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Currency Setup**.

3. Click to expand the **Currency Options** section, and do the following:
   a. Set **Base Currency** to the primary currency that you use for online transactions.
   b. Set **Default Display Currency** to the currency that you use to display pricing in your store.
   c. In the **Allowed Currencies** list, select all currencies that you accept as payment in your store. (To select multiple currencies, hold down the Ctrl key and click each option.)
4. When complete, click the **Save Config** button.

To update currency rates:

1. On the Admin menu, select **System > Manage Currency > Rates**.

   The Manage Currency Rates page displays the rates of the currency you accept in relation to your base currency rate.

Manage Currency Rates

2. Do one of the following:
   - To manually update a currency rate, click the rate you want to change, and type the new value.
   - To import the latest currency rates, set **Import Service** to the service you want to use. "Webservicex" is the default currency rate service. Then, click the **Import** button.

   The rate is updated with the value from the import, with the old rate referenced below.
3. When complete, click the **Save Currency Rates** button.

To customize currency symbols:

1. On the Admin menu, select **System > Manage Currency > Symbols**.

   Each enabled currency for your store appears in the list.

Manage Currency Symbols

2. Enter a custom symbol for each currency you want to use, or select the **Use Standard** checkbox to the right of each currency.
3. When complete, click the **Save Currency Symbols** button.

> It is not possible to change the alignment of the currency symbol from left to right.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Base Currency	Website	The primary currency used in store transactions.
Default Display Currency	Store View	The primary currency used to display prices.
Allowed Currencies	Store View	The currencies accepted by your store for payment.

Shipping Settings

The Shipping Settings establish the point of origin for all shipments made from your store or warehouse, and your preference for managing orders that are shipped to multiple addresses. The point of origin determines the tax rate that is used for products sold from the store.

Shipping Origin

To establish the point of origin:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Shipping Settings**.
3. If applicable, set **Current Configuration Scope** to the store where the configuration applies.
4. Click to expand the **Origin** section.
5. Complete the fields for each part of your point-of-origin address. If you need more room for the street address, use both address lines.
6. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Country	Website	The point-of-origin country.
Region/State	Website	The point-of-origin region or state.
ZIP/Postal Code	Website	The point-of-origin ZIP or postal code.
City	Website	The point-of-origin city.
Street Address	Website	The point-of-origin street address.
Street Address Line 2	Website	An additional line for the point-of-origin street address, if needed.

To configure shipments to multiple addresses:

1. On the Shipping Settings page, click to expand the **Options** section. Then, do the following:

Shipping Options

   a. To allow items from a single order to be shipping to multiple addresses, set **Allow Shipping to Multiple Addresses** to "Yes."

   b. To limit the quantity of a single item that can be shipping to multiple addresses, enter the number in the **Maximum Qty Allowed for Shipping to Multiple Addresses** field.

2. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Allow Shipping to Multiple Addresses	Website	Determines if you allow single orders to be shipping to multiple addresses. Options include: Yes / No
Maximum Qty Allowed for Shipping to Multiple Addresses	Website	Sets a limit for the number of units of a product that can be shipping to multiple addresses.

Store Email Addresses

You can have up to five different email addresses to represent distinct functions or departments for each store or view. In addition to the following predefined email identities, there are two custom identities that you can set up according to your needs.

- General Contact
- Sales Representative
- Customer Support

Each identity and its associated email address can be associated with specific automated email messages and appear as the sender of email messages that are sent from your store.

Store Email Addresses

Step 1: Set Up the Email Addresses for Your Domain

Before you can configure email addresses for the store, each must be set up as a valid email address for your domain. Follow the instructions from your server administrator or email hosting provider to create the email address you need.

Step 2: Configure the Email Addresses for Your Store

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Store Email Addresses**. Then, do the following:

a. Click to expand the **General Contact** section.

b. If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to identify the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.

General Contact

c. In the **Sender Name** field, type the name of the person that you to appear as the sender of all email messages that are associated with the General Contact.

d. In the **Sender Email** field, type the associated email address.

3. Repeat this process for any other email addresses that you plan to use.

4. When complete, click the **Save Config** button.

Step 3: Update the Sales Email Configuration as Needed

If you use custom email addresses, make sure to update the configuration of any related email messages, so the correct identity appears as the sender.

1. In the Configuration panel on the left, under Sales, select **Sales Email**.

2. Click to expand each section, and make sure that the correct store email is selected as the sender of the message.

3. When complete, click the **Save Config** button.

Contact Us

The Contact Us link in the footer of each page is an easy way for customers to keep in touch with you. The form is enabled by default, and can be configured to send inquiries to a specific email address and replies from a specific store identity.

Contact Us

To configure the Contact Us form:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, click **Contacts**.
3. Click to expand the **Email Options** section. Then, do the following:

Email Options

   a. In the **Send Emails To** field, enter the email address where the form information is to be sent.
   b. Set **Email Sender** to the store identity you want to use for any replies sent in response to inquiries you receive.
   c. Select the **Email Template** used to format the data sent from the form.
4. When complete, click the **Save Config** button.

Chapter 6:

Websites, Stores & Views

When Magento is installed, a main website, default store, and default store view are created. You can create additional websites, stores, and store views, according to your needs. For example, in addition to your main website, you might have a secondary website for private sales, and another to be used as a staging site. Each website can have its own domain. Then within each website, you can have multiple stores, and within each store, separate views.

Websites

Suppose you want to sell machine shop equipment online, and your spouse wants to sell handmade baskets. It is unlikely that you would sell both of these product lines in a single store. However, in a single Magento installation, you can do both by setting up separate websites. Each website can have its own domain name. The websites can be set up to share customer data, or to have entirely separate sets of customer data.

Stores

For your handmade baskets website, you might want to set up two stores, one specializing in wicker and one for other materials. You can set up two root categories (one for wicker items and one for other items) and assign one to each store. Several stores of one website can have different independent domain names as well, but it should be configured on the store view level of each store.

Store Views

Your market research indicates that about half of your potential customer base speaks English, and the other half speaks Spanish. Within each store, you can create separate store views, one for each language. The store views share the same catalog, but each is presented in its respective language. Customers can switch from one store view to another using the “language chooser” in the header of the store.

Setting Up Store Hierarchy

Before you begin, carefully plan your store hierarchy in advance because it is referred to throughout the configuration. Each store can have a separate root category, which makes it possible to have an entirely different set of navigation for each store.

To have a separate domain for each website, you must modify the configuration files on the server. To learn more, see: Tutorial: Multi-Site, Multi-Domain Setup.

Manage Stores

To set up a new website:

1. On the Admin menu, select **System > Manage Stores**.
2. From Manage Stores, click the **Create Website** button. Then, do the following:

Website Information

   a. Enter the **Name** of the website. The name is for internal reference, and can refer to the domain of the site or anything else distinguish it from other sites in the hierarchy. For example: Private Sales.

   b. Enter a **Code** in lowercase characters that will be used on the server to point to the domain. For example: private.

   c. (Optional) Enter a **Sort Order** number to determine the sequence in which this site is listed with other sites. Enter a zero to make this site appear at the top of the list.

   d. (Optional) Set **Default Store** to the name of the primary store that is associated with this website.

   e. (Optional) To make this website the default for your hierarchy, select the **Set as Default** checkbox.

3. When complete, click the **Save Website** button.

To set up a new store:

1. Before you begin, set up the root category that will be used for this store.
2. On the Admin menu, select **System > Manage Stores**.
3. From Manage Stores, click the **Create Store** button. Then, do the following:

New Store

   a. Set **Website** to the site that is the parent of this store.
   b. Enter a **Name** for the store. The name is for internal reference to distinguish it from other stores in the hierarchy. For example: Private Sales Store.
   c. Set **Root Category** to the root category that will be used for the main navigation of the store. The root category can be the same as used for other stores, or unique to this store. For example: Private Sales Root.
   d. (Optional) Set **Default Store View** to the view that you want to appear when someone visits the store. All other views are selected from the chooser in the header. For example: English Private Sales View.
4. When complete, click **Save Store**.

To set up a new store view:

1. On the Admin menu, select **System > Manage Stores**.
2. From Manage Stores, click the **Create Store View** button. Then, do the following:

Store View Information

   a. Set **Store** to the parent store of this view.
   b. Enter a **Name** for this store view. The name appears in the “language chooser” in the header of the store. For example: French.
   c. Enter a **Code** in lowercase characters to identify the view. For example: privatesales.fr.

d. To activate the view, set **Status** to "Enabled."

e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.

3. When complete, click the **Save Store View** button.

Configuration Scope

If your Magento installation has multiple websites, stores, or views, you can set the scope of a configuration parameter to apply to a specific part of your installation. The Current Configuration Scope box in the upper-left corner of the Admin workspace determines the scope of the current settings. By default, the configuration scope is set to "Default Config." For Admin users with restricted access, the list includes only the areas where the user is granted permission to access.

The configuration scope applies to products categories, attributes, customer management setting, and so on. The scope of each item appears in brackets after the field to indicate the range of the setting.

Current Configuration Scope

If your installation includes multiple websites, stores or views, you should always set the scope to identify where you want the settings to apply. The possible settings are: [STORE], [WEBSITE], and [GLOBAL].

Any item with the scope of [STORE] can be set differently for each view. For example, because the scope of a product name and description is [STORE], the fields can have a different value for each language. However, some configuration settings—such as postal code—are [GLOBAL] because the same setting applies throughout the system. The [WEBSITE] scope also applies to the entire site, including all views.

To set the configuration scope:

Before making a configuration setting that applies only to a specific website, store, or view, do the following:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, select the page with the configuration settings you want to change. If necessary, click to expand the section to be configured. Then, do the following:
   a. In the upper-left corner of a configuration page, set **Current Configuration Scope** to the website, store, or view where the configuration applies.

      A checkbox appears after each field, and sometimes additional fields become available.

   b. Clear the **Use Default** checkbox that is after the field that you want to edit. Then, enter the new value.
   c. Repeat this process for every field that needs to be updated on the page.
3. When complete, click the **Save Config** button.

Scope Settings

SCOPE	DESCRIPTION
Store	The setting is limited to the store view, which is often used to display a store in multiple languages.
Website	The setting is limited to the website.
Global	The setting applies to the entire installation.

Notes

Chapter 7:

Industry Compliance

Magento Enterprise Edition offers a range of security and privacy capabilities that meet legal requirements and industry guidelines for online merchants. Some are mandated by the payment card industry, and others are required by law, depending on your location.

Topics in this chapter include:

- PCI Compliance
- Privacy Policy
- Cookie Law

You will learn about PCI compliance, and the importance of establishing procedures to protect payment information. You will also learn how to bring your store into compliance with the Cookie Law, which is a requirement in some countries, and considered a “best practice” in others. In addition, you will learn how to customize and maintain a privacy policy for your store.

PCI Compliance Guidelines

The Payment Card Industry (PCI) has established a set of requirements for businesses that accept payment by credit card over the Internet. In addition to the need to maintain a secure hosting environment, there are additional requirements that merchants must meet to ensure the privacy of cardholder data. Every merchant who handles customer credit card information is required by the Payment Card Industry to conduct business within the following guidelines:

PCI REQUIREMENTS
☑ Install and maintain a firewall configuration to protect cardholder data.
☑ Do not use vendor-supplied defaults for system passwords and other security parameters.
☑ Protect stored cardholder data.
☑ Encrypt transmission of cardholder data across open, public networks.
☑ Use and regularly update antivirus software.
☑ Develop and maintain secure systems and applications.
☑ Restrict access to cardholder data by business need to know.
☑ Assign a unique ID to each person with computer access.
☑ Restrict physical access to cardholder data.
☑ Track and monitor all access to network resources and cardholder data.
☑ Regularly test security systems and processes.
☑ Maintain a policy that addresses information security.

As your business grows, you may be required to file a compliance report on an annual basis. PCI reporting requirements increase in proportion to merchant level, but are waived for businesses that process fewer than 20,000 credit card transactions per year. To learn more, visit the PCI Security Standards Council website.

Privacy Policy

Your store includes a sample privacy policy that must be updated with your own information. Your privacy policy should describe the type of information that your company collects, and how it is used. It should also list the filenames of cookies that are placed on the computers of people who visit your store. Any additional cookies that are associated with third-party extensions and add-ons should be included in the list. For a complete list of the cookies used by Magento, see Cookie Restriction Mode.

Privacy Policy

To edit your privacy policy:

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. Find the privacy policy in the list, and click to open the page.
3. In the panel on the left, click **Content**.
4. To work in WYSIWYG mode, click the **Show/Hide Editor** button.
5. Make the necessary changes to the content.
6. When complete, click the **Save Page** button.

Cookie Law Compliance

Cookies are small files that are saved to the computer of each visitor to your site, and used as temporary holding places for information. Information that is saved in cookies is used to personalize the shopping experience, link visitors to their shopping carts, measure traffic patterns, and improve the effectiveness of promotions.

To keep pace with legislation in many countries regarding the use of cookies, Magento offers merchants a choice of methods for obtaining customer consent.

Implied Consent

Using cookies with implied consent is the method that is currently the most widely adopted in the UK. Implied consent means that visitors to your store have a clear understanding that cookies are a necessary part of operations, and by using your site, have indirectly granted permission to use them.

The key to gaining implied consent is to provide enough information for a visitor to make an informed decision. Many stores display a message at the top of all standard pages that provides a brief overview of how cookies are used, with a link to the store's privacy policy. The privacy policy should describe the type of information that your store collects, and how it is used.

Expressed Consent

Operating your store in "cookie restriction mode" requires visitors to express their consent before any cookies can be saved to their computers. Unless consent is granted, many features of your store will be unavailable.

Cookie Restriction Mode

Operating your store in "Cookie Restriction Mode" requires that visitors express their consent before cookies can be saved to their computers. Unless consent is granted, many features of your store become unavailable.

If Google Analytics is available for your store, it can be invoked only after the visitor has granted permission to use cookies. For more information, see Google's cookie usage documentation.

When Cookie Restriction Mode is enabled, visitors to your store are notified that cookies are required for full-featured operations. They are then referred to your privacy policy for more information, and encouraged to grant consent by clicking the Allow button. The message disappears after the visitor click the Allow button. The Cookie Restriction Mode message resides in a CMS static block, and can be edited to suit your voice and style.

Your privacy policy should include the name of your store and contact information, and explain the purpose of each cookie that is used by your store. See the end of this topic for a complete list of the cookies used.

Cookie Restriction Notice

Step 1: Enable Cookie Restriction Mode

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, click **Web**.
2. Click to expand the **Session Cookie Management** section, and do the following:

Cookie Session Management

   a. Enter the **Cookie Lifetime** in seconds.
   b. If you want to make cookies available to other folders, enter the **Cookie Path**. To make the cookies available anywhere in the site, enter a forward slash.
   c. To make the cookies available to a subdomain, enter the subdomain name in the **Cookie Domain** field. (subdomain.yourdomain.com) To make cookies available to all subdomains, enter the domain name preceded by a period. (.yourdomain.com)
   d. To prevent scripting languages such as JavaScript from gaining access to cookies, set **Use HTTP Only** to "Yes."
   e. Set **Cookie Restriction Mode** to "Yes."

> **Important!** If you disable cookies, you should also disable Full-Page Caching to ensure that no customer-related information is saved.

3. When complete, click the **Save Config** button.

Step 2: Edit the Cookie Restriction Message

1. On the Admin menu, select **CMS > Static Blocks**.
2. Find the **Cookie Restriction Notice**, and click to open the block. Then, do the following:

Editing the Cookie Restriction Notice

   a. Select each **Store View** where the notice should appear.
   b. Set **Status** to "Enabled."
   c. In the **Content** box, edit the message as needed.

3. When complete, click the **Save Block** button.

Step 3: Update Your Privacy Policy

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. Find your **Privacy Policy** in the list, and click to open the page.
3. In the panel on the left, click **Content.** If necessary, click the **Show/Hide Editor** button to work in WYSIWYG mode.
4. Update your privacy policy to describe the information that your company collects, and how it is used. You can include the information from the tables at the end of this topic.
5. When complete, click the **Save Page** button.

Field Descriptions

FIELD	DESCRIPTION
Cookie Lifetime	Determines when the browser can delete Magento cookies. The default value is 3600, which means that cookies remain in the browser for one hour.To ensure that cookies expire at the end of a browser session, set the lifetime to zero.
Cookie Path	Allows you to make Magento cookies available other folders. If you want to make cookies available anywhere in a site, you should set this value to a single forward slash.
Cookie Domain	Determines if cookies are visible to subdomains. (http://subdomain.domain.com) To ensure that your cookies are available to all subdomains, enter your domain name with a prefix of a period. (.domain.com)
USE HTTP Only	Makes the cookie available only through HTTP protocol, and unavailable to JavaScript or other scripting languages.

Cookie Reference

Magento Standard Cookie

COOKIE NAME	COOKIE DESCRIPTION
`USER_ALLOWED_SAVE_COOKIE`	Indicates if a customer is allowed to use cookies.
`external_no_cache`	A flag that indicates if caching is disabled.
`persistent_shopping_cart`	The session key.
`Stf`	If product links were sent to friends, stores the timestamps in the format: `$timeStamp1, $timestamp2, …, $timestampN`
`pollN`	A poll ID that indicates if a vote has occurred.
`frontend`	Session ID
`guest-view`	Allows guests to edit their orders.

Magento Cookies Used with Full Page Cache

COOKIE NAME	COOKIE DESCRIPTION
`CUSTOMER`	Hashed value of a customer ID in the format: `customer_$customerId`
`CUSTOMER_INFO`	Hashed value of a customer group ID in the format: `customer_group_$customerGroupId`
`NEWMESSAGE`	Indicates if a new message has been received.
`CART`	Hashed value of a quote ID in the format: `$quoteId`
`COMPARE`	The product IDs added to product compare in the format: `$productId 1, $productId 2, …, productId N`
`POLL`	The ID of a recently-voted poll.
`RECENTLYCOMPARED`	The product IDs of recently compared products in the format: `$productId 1, $productId 2, …, productId N`
`WISHLIST`	A hashed list of products added to Wishlist in the format: `$productId 1_$productId 2_ …, _productId N`
`WISHLIST_CNT`	A hashed number of items in the customer's Wishlist in the format: `wishlist_item_count_$productCount`
`CUSTOMER_AUTH`	Indicates if a customer is logged in. A hashed value in the format: `customer_logged_in_0|1`
`CATEGORY_INFO`	Stores category information so pages can load more quickly.
`LAST_CATEGORY`	Recently visited category ID in the format: `$categoryID`
`VIEWED_PRODUCT_IDS`	Recently viewed product IDs in the format: `$productId 1, $productId 2, …, productId N`
`currency`	The code for the currency selected by a customer ('USD', 'UAH', 'GBP', etc.)
`store`	The store view code.
`NO_CACHE`	Indicates if the cache is allowed to be used.
`LAST_PRODUCT`	The product ID of the last product viewed.

Google Analytics Cookies

COOKIE	DESCRIPTION
`_utma`	Distinguishes users and sessions.
`_utmb`	Determines new sessions/visits.
`_utmc`	Determines if the user was in a new session/visit.
`_utmz`	Stores the traffic source or campaign that explains how the user reached your site.

Notes

Enterprise
EDITION

Product Catalog

Chapter 8:

Visual Merchandiser

Visual merchandising[1] is a term used in retail to describe the art and science of floor plan development and the multi-dimensional presentation of products. In your Magento Enterprise Edition store, you might think of the category-based navigation as the floor plan, and the multi-dimensional presentation of products as a dynamic selection of products that changes according to conditions that you specify.

> **Important!** Visual Merchandiser requires Magento Enterprise Edition, version 1.14.1. If you need support for any other version of Magento, please contact On Tap.

In this chapter, you will learn how to use Visual Merchandiser to attract customers and increase sales. Topics include:

- Visual Merchandiser Configuration
- Category Setup
- Hero Products
- Using the Merchandiser Window
- Automatic Sorting
- Smart Category Rules
- Visual Merchandiser Cache
- Product Cache
- Clone Category IDs
- Mass Product Assignment

[1] A term used in retail to describe the art and science of floorplan development and the multi-dimensional presentation of products.

Visual Merchandiser Configuration

The Visual Merchandiser configuration determines the layout of the merchandiser window, the format of the products in the category, and way updates are managed when smart category rules dynamically change the selection of products.

Process Overview:

Step 1: Define the Page Layout

Step 2: Set Visibility Options

Step 3: Complete the Smart Category Options

Step 4: Save Changes and Refresh Cache

To configure Visual Merchandiser:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Visual Merchandising Options** section. Then, follow these step to complete the configuration.

Step 1: Define the Page Layout

1. To determine which attributes appear in the product block, enter the code of each attribute that you want to include, separated by a comma. By default, the color, name, and price attributes appear.
2. In the **Column count** field, enter the number of product blocks that appear on each row of the merchandiser window. To make the window resemble your storefront, use the same number of columns that are used to display the product list when viewed as a grid.
3. If you want to include additional images from the gallery for reference, set **Show extra images** to "Yes." When the **Max extra images thumbnail** field appears, enter the number of additional images you want to include from the gallery.

Attributes in Product Block

You can hover over each thumbnail to view a larger image. If you decide that one of the thumbnails is a better choice, you must open the product in edit mode, and change the Base Image assignment.

Thumbnail Images and Creation Date

4. To help you decide which products to feature based on the age of each product, set **Show creation date** to "Yes."

5. Do one of the following to determine how the system manages dynamic page loads:

- If the category has a large number of products, set the **Ajax page load threshold** to the maximum number of products that you want the system to manage before triggering Ajax page loads. Ajax page loads prepares the next batch of product images in advance. When the customer scrolls down the page, the images appear without delay.
- To disable Ajax page loads, leave the field blank.

Step 2: Set Visibility Options

Depending upon the configuration, products that are set to "Not Visible Individually," such as simple products that are associated with a configurable product, and disabled products can be either grayed out or hidden from view.

Product Visibility Settings

1. For products with a Visibility setting of "Not Visible Individually," do one of the following:
   a. To display a grayed out image of such products, set **Hide not visible products** to "No."
   b. To hide products such products from view, set **Hide not visible products** to "Yes."
2. For products with a Status setting of "Disabled," do one of the following:
   a. To display a grayed out image of such products, set **Hide disabled products** to "No."
   b. To hide such products from view, set **Hide disabled products** to "Yes."

"Grayed Out" Products

3. To prevent other administrators from using the Category Products tab to change category positions, set **Hide category position input fields** to "Yes." The input fields in the Position column disappear and the position of each item is set to zero.

Category Products with Position Input Fields Removed

Step 3: Complete the Smart Category Options

1. To ensure that any smart category rules that are in place remain current, do the following:

   a. Set **Rebuild on product save** to "Yes."

   b. Set **Rebuild on category save** to "Yes."

2. To update to categories automatically on schedule, set **Rebuild on cron** to "Yes."

To determine the time interval between scheduled updates, set **Cron Schedule** to indicate the length of time between updates. The character positions in the cron format represent the number of minutes, hours, days, weeks, and months between cron updates. The default interval is set to run every two hours, starting at midnight, as follows:

```
0 */2 * * *
```

To override the cron schedule and update the categories immediately, click the **Rebuild Category Products for Smart Categories** button.

4. When complete, click the **Save Config** button.

5. When prompted to refresh the cache, click the **Cache Management** link. Then, select the checkbox of each invalid cache, and click **Submit**.

Visual Merchandising Options

Field Definitions

FIELD	SCOPE	DESCRIPTION
List attribute codes	Global	Determines the product attributes that appear in each product block. Separate multiple attribute codes with a comma. By default, each block includes the color, name, and price.
Column count	Global	Determines the default number of columns used to display products in the merchandiser window. By default, the number of columns is set to 4.

FIELD	SCOPE	DESCRIPTION
		To make the merchandiser window more closely resemble your storefront, make the column count match the layout of the product listing when viewed in grid mode.
Show extra images	Global	Determines if additional images from the gallery of each product appear as thumbnails for reference when working in the merchandiser window. Thumbnails can help you choose the image you want to use. Hover over a thumbnail to update the main image. Options include: Yes — Displays the Max extra images thumbnail field, with a default value of 4. Enter the number of extra thumbnail images you want to show. No — Does not include extra thumbnail images from the gallery.
Show creation date	Global	Shows the date each product was created in the merchandiser window to help you decide which products to feature. Options include: Yes / No
Ajax page load threshold	Global	Enables Ajax page loads when a category contains more products than the specified threshold. Ajax page loads prepares the next set of images that are needed in advance. When the customer scrolls down the page, the images can load without delay. Only the number of images that are needed for the next display are made ready. The default Ajax page load threshold is 10. To disable Ajax page loads, leave this field empty. Disabling Ajax page loads causes the entire category to be read into memory at the same time. If a category has a large number of products, it might slow down the system, or fail to load properly.
Hide not-visible products	Global	Hides products that have visibility set to either “Not Visible Individually” or “Search.” Options

FIELD	SCOPE	DESCRIPTION	
		Yes	Products that are not visible do not appear in the merchandiser window, but remain in the category.
		No	Products that are not visible appear in the merchandiser window for reference, but are grayed out.
Hide disabled products	Global	Hides products that are currently disabled. Options include:	
		Yes	Disabled products do not appear in the merchandiser window, but remain in the category.
		No	Disabled products appear in the merchandiser window, but are grayed out. The products are assigned a sort position at the end of the list.
Hide category position input fields	Global	Prevents category positions from being manually updated with Manage Categories. Options include: Yes / No	
Rebuild on product save	Global	Determines if smart category rules are rebuilt when the product is saved. Options include:	
		Yes	(Recommended) When product is saved, any changes to attributes that are required for smart category rules are queued for Cron.
		No	Does not rebuild smart category rules when a product is saved.
Rebuild on category save	Global	Determines if smart category rules are rebuilt when the product is saved. Options include:	

FIELD	SCOPE	DESCRIPTION
		Yes — (Recommended) When category is saved, any changes to attributes that are required for smart category rules are queued for Cron. No — Does not rebuild smart category rules when a related category is saved.
Rebuild on Cron	Global	Determines if category updates are processed automatically by Cron. Options include: Yes — (Recommended) Processes queued updates to categories automatically. No — Does not automatically process queued updates to categories.
Cron Schedule	Global	Defines the interval of time used by Cron to schedule when category updates are processed. The default interval is set to run every two hours, starting at midnight, as follows: `0 */2 * * *` The character positions in the Cron format represent the number of minutes, hours, days, weeks, and months between cron updates. To override the cron schedule and rebuild the categories, click the Rebuild Category Products for Smart Categories button.
New product handling	Global	Determines where a smart category rule adds new products dynamically in relation to other products in the list. Options include Add to top / Add to bottom.

Category Options

The position of products in the category can be specified manually by dragging and dropping products into position in the Visual Merchandiser window, or by applying a predefined sort order.

The Visual Merchandiser category options can be set up separately for each store view. The options determine the selection of products, their relative position in the list, and the attributes that are available for use with smart category rules.

Visual Merchandiser Category Setup

Process Overview:

Step 1: Set the Scope of the Configuration

Step 2: Set Up the Options

Step 3: Save, Refresh, and Verify

Step 1: Set the Scope of the Configuration

1. On Admin menu, select **Catalog > Manage Categories**.
2. To set the scope of the configuration, set **Choose Store View** in the upper-left corner to the store view where the settings apply.
3. In the category tree on the left, select the category that you want to edit.

Step 2: Set Up the Options

1. If you want to **Only include products matched by rules**, select "Yes." Otherwise, select "No." To learn more, see: Smart Category Rules.
2. In the **Hero Products** field, enter the SKU of each product that you want to appear at the top of the list. To learn more, see: Hero Products.
3. Set **Automatic sort** to one of the following:

- None
- Move out of stock to bottom
- Special price to top
- Special price to bottom

Automatic sort overrides and resets any drag-and-drop positions that were set manually in the Visual Merchandiser window.

Visual Merchandiser Options

Step 3: Save, Refresh, and Verify

1. When complete, click the **Save Category** button.
2. When prompted to refresh the cache, click the **Cache Management** link. Then, select the checkbox of each invalid cache, and click **Submit**.
3. On the Admin menu, select **Catalog > Categories > Manage Categories**. Select the category you were working on, and click the **Visual Merchandiser** tab to return to the setup.
4. To test the results, click the **Show Visual Merchandiser** button.

   If the merchandiser window doesn't appear, it might be minimized. Hover over the browser icon in the taskbar at the bottom of the screen, and click the thumbnail to open the merchandiser window.

Show Visual Merchandiser

5. Verify that the product selection, hero products, sorting, and smart category logic work correctly. If you need to make adjustments, change the settings and try again.

Field Descriptions

FIELD	DESCRIPTION
Only include products matched by rules	Determines if the list includes only products that are matched by promotional rules. Options include: Yes / No
Hero Products	Identifies “hero” products that always appear at the top of the list. Enter the SKU of each “hero” product, separated by a comma.
Automatic sort	Determines the order that the list is automatically sorted. When a category is set to automatically sort, any drag-and-drop positions are reset. Options include: None — No automatic sorting order is specified. Move out of stock to bottom — All products that are out of stock appear at the bottom of the list. Special price to top — All products with special prices appear at the top of the list. Special price to bottom — All products with special prices appear at the bottom of the list.

Hero Products

Hero products are identified by SKU and appear in a special section at the top of the merchandiser window. They can be dragged and dropped to new positions only within the Hero Products section. Unlike other products in the category, hero products do not have Move to Top and Move to Bottom arrows.

Hero Products in Merchandiser Window

To assign hero products:

1. On the Visual Merchandiser tab under Options, use one of the following methods do obtain the SKUs you need.

Method 1: Download the SKUs

1. On the Visual Merchandiser tab, click the **Show Visual Merchandiser** button.
2. At the top of the merchandiser window, set the **Options** control to “”Download SKUs.” Then, click the **Submit** button.

Download SKUs

3. When prompted to open or save the file, click **Open**. You now have a list of SKUs in your spreadsheet that you can use for reference.

Downloaded SKUs

Method 2: Use the Products Tab

1. Click the **Products** tab. The SKU column is to the right of the product name.

Category Products Tab

2. Use the filter controls to find the SKUs you need. Then, return to the Virtual Merchandiser tab.

2. Enter the SKUs in the **Hero Products** field, separated by commas. The hero products appear in the order that the SKUs are entered.
3. When complete, click the **Save Category** button.
4. Click the **Visual Merchandiser** tab. Then, click the **Show Visual Merchandiser** button to see how they look.

Smart Category Rules

Smart category rules dynamically change the product selection according to a set of conditions. Each category can have one smart category rule, but a single rule can have many conditions.

You can choose to display only the products that meet the conditions of the rule, or add them to the list of products already in the category. For example, you might create a smart category for a specific brand. Then, products of the same brand are automatically added, even if they're not assigned to the same category. You can add as many conditions to the expression as needed to describe the products that you want to include.

Each condition has an attribute, value, and logical operator. Only attributes with the "Use in Product Listing" property set to "Yes" are available for smart category rules. If you want to use an attribute that is not included in the list, open the attribute in edit mode, and set "Use in Product Listing" to "Yes."

Although Date attributes are not supported, you can use the Date Created or Date Modified attributes to define a date or range of dates. For example, to include only products that were created during the past week, set Date Created to a value of "<7."

Add Attribute

To create a smart rule:

1. From the category's Visual Merchandiser tab, click the **Add Attribute** button. Then, do the following:

   a. Select the **Attribute** you want to base the condition upon.

Attributes Available for Smart Category Rules

   b. Enter the **Value** to be matched.

   c. Select the **Logic** that is needed to form the expression.

2. Repeat this process for each attribute that is needed to describe the condition(s) to be met. For example, to match products that were created between 7 and 30 days ago, do the following:

   a. Set **Date Created** to "<30."

   b. Set **Logic** to "AND."

   c. Set **Date Modified** to ">7."

Smart Category Attribute Date Range

3. To limit the product selection to only those that meet the conditions of the rule, set the **Only include products matched by rules** option to "Yes."

Only Include Products Matched by Rules

4. To select a sort order that is automatically applied as the product selection changes, set **Automatic Sort** to one of the following:

   - Move out of stock to bottom
   - Special price to top
   - Special price to bottom

Automatic Sort

5. When complete, click the **Save Category** button.

Field Descriptions

FIELD	DESCRIPTION	
Attribute	Identifies the attributes upon which the logic of the smart category is based. To include multiple attributes, click the Add Attribute button. Options include:	
	Apply MAP	Applies the Minimum Advertised Price to products in the smart category.
	Clone Category IDs	Gives you the ability to dynamically include products from another category. Enter the ID of the category to be cloned into the Value field. For multiple categories, separate each ID with a comma.
	Date Created (days ago)	Includes products that were created within the number of days specified.
	Date Modified (days ago)	Includes products that were updated within the number of days specified.
	Image Label	Includes products based on the Image Label value.
	Manufacturer's Suggested Retail Price	Includes products that match the MSRP value specified.
	Name	Includes products that match the product Name value specified.
	Price	Includes products that match the Price value specified.
	Small Image	Includes products that match the Small Image value specified.
	URL Key	Includes products that match the URL Key value specified.
	Date Created (days ago)	Includes products that were created within the number of days specified.
	Status	Includes products that match the Status value specified. Available values: Enabled / Disabled

FIELD	DESCRIPTION	
	Thumbnail	Includes products that match the Thumbnail value specified.
	Thumbnail Label	Includes products that match the Thumbnail Label value specified.
	URL Key	Includes products that match the URL Key value specified.
	Apply MAP	Applies the Minimum Advertised Price to products in the smart category.
	Clone Category IDs	Gives you the ability to dynamically include products from another category. Enter the ID of the category to be cloned into the Value field. For multiple categories, separate each ID with a comma.
	Date Created (days ago)	Includes products that were created within the number of days specified.
	Date Modified (days ago)	Includes products that were updated within the number of days specified.
	Image Label	Includes products based on the Image Label value.
	Manufacturer's Suggested Retail Price	Includes products that match the MSRP value specified.
	Name	Includes products that match the product Name value specified.
	Price	Includes products that match the Price value specified.
	Short Description	Includes products that match the Short Description value specified.
	Small Image	Includes products that match the Small Image value specified.
	Small Image Label	Includes products that match the Small Image Label value specified.

FIELD	DESCRIPTION	
	Special Price	Includes products that match the Special Price value specified.
	Status	Includes products that match the Status value specified. Available values: Enabled / Disabled
	Thumbnail	Includes products that match the Thumbnail value specified.
	Thumbnail Label	Includes products that match the Thumbnail Label value specified.
	URL Key	Includes products that match the URL Key value specified.
Value	Specifies the value that the attribute that is needed to meet the condition. Unless an operator is specified, the default "equal to" operator is applied. Operators include:	
	=	Equal to
	>	Greater than
	<	Less than
	!	Not equal to
	>=	Greater than or equal to
	<=	Less than or equal to
	*	Wildcard that can be used to match text-based attributes with multiple values. For example, *Blazer* matches any product name that includes the word Blazer.
Logic	Specifies the logical operator that is needed to describe multiple conditions. Options include: AND / OR	

Rebuilding Smart Categories

Whenever the attribute values of a product change, the smart rules that are in effect can alter the position of the SKU in product listings. Based on the value of the attributes, a product might be included, or excluded from the dynamically-generated list of products that is assigned to the category.

Because the process is subject to continual change, categories are scheduled to be rebuilt on an ongoing basis. Changes are queued, and the categories are rebuilt according to cron schedule. Changes can also be queued whenever a category or product is saved. When necessary, you can override the scheduled cron job to initiate a rebuild of the category. Due to the nature of the scheduled task, there might be a delay of about five minutes before the update is reflected in the storefront.

The Rebuild Visual Merchandiser Categories button in Cache Management can be used at any time to initiate a rebuild of smart category products. The same override can be initiated from the Visual Merchandiser configuration.

Rebuild Visual Merchandiser Smart Categories

Method 1: From Cache Management

1. On the Admin menu, select **System > Cache Management**.
2. On the Cache Storage Management page, under Additional Cache Management, click the **Rebuild Smart Category Products** button.

Method 2: From Visual Merchandiser Configuration

1. On the Admin menu, select **System > Configuration**.
2. Under Cron schedule, click the **Rebuild Category Products for Smart Categories** button.

3. In the panel on the left, under Catalog, select **Catalog**. Then, click to expand the **Visual Merchandiser** section.
4. While you're in the configuration, verify that:
   - **Rebuild on product save** is set to "Yes."
   - **Rebuild on category save** is set to "Yes."
5. When complete, click the **Save Config** button.

Using the Merchandiser Window

The merchandiser window is where Visual Merchandiser gets its name. Its visual drag-and-drop interface makes it easy to arrange and rearrange products in any category.

Process Overview:

Step 1: Define the Scope and Product Selection
Step 2: Sort the List
Step 3: Arrange the Products
Step 4: Save Changes and Refresh

Step 1: Define the Scope and Product Selection

1. On Admin menu, select **Catalog > Manage Categories**.
2. In the category tree on the left, select the category that you want to edit.
3. Click the **Visual Merchandiser** tab.
4. Click the **Show Visual Merchandiser** button.

   Visual Merchandiser appears in a pop-up window, and lists the products in the category selected. You can drag the window to another position on the screen, but it cannot be resized.

   If the category was previously set to sort automatically, all product positions are reset when the Merchandiser window opens.
5. To set the scope of the configuration, set the **Storefronts** control at the top of the window to the website or store view where the settings apply.

Set the Configuration Scope

6. To remove a product from the category, click to select the product. Then, click the **Detach** ✖ button in the lower-left corner of the product block. The product is removed from the category, but remains in the catalog. The change does not become permanent until you click the Save positions button.

Detach Product

Step 2: Sort the List

1. Set the **Options** control at the top of the window to one of the following:
   - Move out of stock to bottom
   - Special price to top
   - Special price to bottom

   The selected sort order overrides and resets any drag-and-drop positions that were manually set.

2. Resort the list as many times as needed while working in the merchandiser window.

Step 3: Arrange the Products

Method 1: Drag and Drop

Drag and drop cannot be used on hero products, because they have a fixed position at the top of the list.

1. Click the product you want to move, and hold the mouse button down. To select multiple products, do either of the following:
   - To select a contiguous group of products, hold down the **Shift** key, and click the first and last product in the group.
   - To select multiple scattered products, hold down the **Ctrl** key, and click each product.

   The header of the selected product(s) turns blue, and the cross hairs ✥ cursor appears.
2. Drag the product(s) to the new position, and release the mouse button.

Drag and Drop Product into Position

Method 2: Move to Top / Bottom

1. To move a product to the top of the list, click the **Move Top**⇑ arrow at the lower-right corner of the product block.
2. To move a product to the bottom of the list, click the **Move Bottom**⇓ arrow, at the lower-right corner of the product block.

Step 4: Save Changes and Refresh

1. To save the updated product positions, click the **Save Positions** button.
2. When prompted to refresh the cache, click the **Cache Management** link. Then, select the checkbox of each invalid cache, and click **Submit**.

Visual Merchandiser Product Controls

CONTROL	DESCRIPTION
Move to Top	Moves the selected product(s) to the top of the list.
Move to Bottom	Moves the selected product(s) to the bottom of the list.
Detach from Category	Removes the product from the category. The product remains in the catalog, but is no longer assigned to the category.

Visual Merchandiser Window Controls

CONTROL	DESCRIPTION	
Save Positions	The Save Positions button in the upper-left corner of the merchandiser window saves any changes made to the category and product positions.	
Storefronts	Sets the scope of the merchandiser window. Select the website where the settings to apply.	
Options	**Sort Options**	The sort options provide several predefined ways to sort the list. You can reapply a sorting order as needed after you have dragged and dropped products into new positions. The selected sort order is reapplied whenever the cron schedule is triggered to update smart category rules.
	Move out of stock to bottom	Moves any products that have reached the out of stock threshold to the bottom of the list.
	Special price to top	Moves any products with special prices to the top of the list.
	Special price to	Moves any products with special prices

CONTROL	DESCRIPTION	
	bottom	to the bottom of the list.
	Utilities	
	Mass Product Assignment	Assign multiple products to the category, or remove multiple products from the category.
	Download SKUs	Downloads the SKUs in the category to a CSV file.
Submit	Applies the selected option to the products in the merchandiser window.	
Search	Locates products in the catalog, based on name or SKU. The search results appear in a list below the search box. Matching products that are already in the category can be moved to the top of the list. Products that are not in the category can be assigned to the category.	
Save Positions	The Save Positions button in the upper-left corner of the merchandiser window saves any changes made to the category and product positions.	

Product Search

The Search box in the upper-right corner of the merchandiser window can be used to find products in the catalog, based on name or SKU. For products that are already in the category, you can move them to the top of the merchandiser list. For products in other categories, you can add them to the category, so they appear in the merchandiser window. Even if a product is not yet assigned to a category, you can use Visual Merchandiser to add the product to a category.

Visual Merchandiser Search

To search for products in the store catalog:

1. In the Search box, do one of the following:
   - Enter the **Name**, or partial name of the product(s) that you want to find.
   - Enter the **SKU**, or partial SKU of the product(s) that you want to find.
2. Click the **Search** button.

   The list of search results appears below. If there are many matches, a vertical scroll bar appears. Any product that is already in the category is marked with a green Move to Top arrow. Products in other categories have a green Add to Category button.

Visual Merchandiser Search Results

3. To move a product in the category to the top of the list, click the **Move to Top** arrow. The results show immediately in the merchandiser window.

   If you have a large catalog, sometimes moving a product to the top of the list can make it easier to drag and drop it into another position.

4. To add a product from another category, click the **Add to Category** button.

   The new product appears in the upper-left position of the merchandiser window.

Product Added to Category

5. To save both category assignment and position changes, click the **Save Position** button.

Clone Category IDs

When setting up a smart category rule, you can dynamically clone products from multiple categories, based on category ID.

Clone Category IDs

To clone a category:

1. To determine the category IDs that you need, click the category in the category tree. The category ID is at the top of the page, in parentheses after the category name.

2. Return to the original category you were working on, and click the **Visual Merchandiser** tab.
3. In the Smart Category section, click the **Add Attribute** button. Then, do the following:
4. Under **Attribute**, select "Clone category ID."
5. Under **Value**, enter the **ID** of the category you want to clone. To clone multiple categories, separate each ID with a comma.
6. You can add more conditions as needed, to complete the rule.

Mass Product Assignment

Visual Merchandiser gives you the ability to assign multiple products to the category, as well as remove multiple products from the category. This can be a real time saver if you work with a large number of products.

Mass Product Assignment

To assign multiple products to the category:

1. Before you begin, prepare the list of the SKUs that you want to assign to the category.
2. At the top of the merchandiser window, set the **Options** control to "Mass Product Assignment." Then, click the **Submit** button.
3. When the box appears, enter each **SKU** to be assigned on a separate line. The SKUs can be typed or pasted in to the box.

Enter SKUs to be Assigned

4. To assign the products to the current category, click the **Assign** button.

   The newly added products appear in upper-left of the merchandiser window.

Multiple Products Added to Category

5. To make the category assignments permanent, click the **Save positions** button.

To remove multiple products from the category:

1. At the top of the merchandiser window, set the **Options** control to “Mass Product Assignment.” Then, click the **Submit** button.
2. When the box appears, enter each **SKU** to be removed from the category on a separate line. The SKUs can be typed or pasted in to the box.
3. Click the **Remove Products** button.

   The products are removed from the merchandiser window.
4. To make the change permanent, click the **Save positions** button.

Notes

Chapter 9:

Navigation by Category

The term **navigation**[1] refers to methods shoppers use to move from one page to another in your store. The main menu, or top navigation of your store is primarily a list of categories. The category structure of your catalog is the main way people find products in your catalog. You will also find categories in the **breadcrumb**[2] trail that runs across the top of most pages, and in the layered navigation that appears on the left side of some two- or three-column pages. These are all examples of how categories can be used to navigate throughout your store.

For a product to be visible in your store, it must be assigned to at least one category. Each category can have a dedicated landing page with an image, static block, a description, and list of products. You can also create special designs for category pages that become active for a specific period of time such as for a holiday season or promotion.

Categories in Main Menu

[1]The primary group of web page links that a customer uses to navigate around the website; the navigation links to the most important categories or pages on an online store.

[2]A navigation aid that helps the user to keep track of their location within your store.

Top Navigation

The main menu of your store displays the selection of categories that are available in your catalog. You can think of the top navigation as different departments in your store. A top-level category serves as a landing page for all the subcategories below. The position and presentation of the top navigation might vary by theme, but the way it works is the same.

Main Menu

The first level of categories below the root typically appear as options in the main menu. Below that, you can have as many additional subcategories as needed. The category structure of your catalog can influence how well your site is indexed by search engines. The deeper a category, the less likely it is to be thoroughly indexed. As a general rule, anywhere between one and three levels is considered to be the best. You can set the maximum number of levels that are available in your top navigation in the system configuration.

To set the depth of the top navigation:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Category Top Navigation** section.

Category Top Navigation

4. In the **Maximal Depth** field, enter the number of subcategory levels you want to make available for the top navigation.
5. When complete, click the **Save Config** button.

Breadcrumb Trail

A breadcrumb trail is a set of links that shows where you are in relation to other pages in the store. You can click any link in the breadcrumb trail to return to a previous page. Here's an example of a breadcrumb trail from the Magento Demo Store:

HOME / ACCESSORIES / JEWELRY / PEARL STUD EARRINGS

The breadcrumb trail can be configured to appear on CMS content pages, as well as catalog pages. The format and position of the breadcrumb trail varies by theme, but it is usually located in the upper-left, just below the header.

Breadcrumb Trail

To add breadcrumbs to CMS pages:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Web**. Then, do the following:
   a. Click to expand the **Default Pages** section.
   b. Set **Show Breadcrumbs for CMS Pages** to "Yes."
3. When complete, click the **Save Config** button.

Show Breadcrumbs for CMS Pages

Layered Navigation

Layered navigation makes it easy to find products based on category, price range, or any other available attribute. Layered navigation usually appears in the left column of search results and category pages and sometimes on the home page. The standard layered navigation includes a "Shop By" list of categories and price range. You can configure the way layered navigation appears in your store, including the product count and price range.

Layered Navigation by Category and Price

To set up layered navigation:

1. On the Admin menu, select **System Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Layered Navigation** section. Then, do the following:

Configure Layered Navigation

   a. To display the results after each attribute, set **Display Product Count** to "Yes."
   b. Set **Price Navigation Step Calculation** to one of the following:
      - Automatic
      - Manual

c. For a manual calculation, enter a number in the **Default Price Navigation Step** field to determine how the price ranges are grouped. For example, if you enter 100, the prices appear in groups of 100.

Manual Price Navigation Step

4. When complete, click the **Save Config** button.

Filterable Attributes

Layered navigation can be used to search for products by category or by attribute. For example, when a shopper chooses the Apparel/Shoes category from the top navigation, the initial results include all products in the shoes category. The list can be filtered further by choosing a specific color or size, or by specifying values for both color and size. For an attribute to be included in layered navigation, its property settings must be set to make it filterable.

Filterable Attributes In Layered Navigation

Step 1: Set the Attribute Properties

1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
2. Click to open the attribute in edit mode, and do the following:

a. Scroll down to the Frontend Properties section, and set **Use In Layered Navigation** to one of the following:

   - Filterable (with results)
   - Filterable (no results)

b. Set **Use In Search Results Layered Navigation** to "Yes."

Step 2: Make the Category an Anchor

1. On the Admin menu, select **Catalog > Manage Categories**.
2. In the Categories panel on the left, click to open the category.
3. On the **Display Settings** tab, set **Is Anchor** to "Yes."
4. Click the **Save Category** button.

To test the setting, go to your store and select the category in the top navigation. The selection of filterable attributes for the products in the category appears in the layered navigation.

Price Navigation

Price navigation can be used to distribute products by price range in layered navigation. You can also split each range in intervals. There are several ways to calculate price navigation:

- Automatic (Equalize Price Ranges)
- Automatic (Equalize Product Counts)
- Manual

With the first two methods, the navigation steps are calculated automatically. The manual method lets you specify a division limit for price intervals. The following example shows the difference between price navigation steps of 10 and 100.

Iterative splitting is a technique that provides the best distribution of products among price ranges. With iterative splitting, after a customer chooses to view the $0.00-$99 range, the customer can drill-down through several sub-ranges of prices. Price-range splitting stops when the number of products reaches the threshold set by the Interval Division Limit.

Example: Price Navigation Steps of 10 and 100

PRICE STEP BY 10	PRICE STEP BY 100
$20.00 - $29.99 (1)	$0.00 - $99.99 (4)
$30.00 - $39.99 (2)	$100 - $199.99 (5)
$70.00 - $79.99 (1)	$400.00 - $499.99 (2)
$100.00 - $109.99 (1)	$700.00 and above (1)
$120.00 - $129.99 (2)	
$150.00 - $159.99 (1)	
$180.00 - $189.99 (1)	
$420.00 - $429.99 (1)	
$440.00 - $449.99 (1)	
$710.00 and above (1)	

To configure price layered navigation:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Catalog, select **Catalog**.
2. In the upper-left corner, set **Current Configuration Scope** to the store view to be configured.
3. Click to expand the **Layered Navigation** section.
4. If you want to display the number of products in parentheses after each filtered item, set **Display Product Count** to "Yes."
5. Set **Price Navigation Steps Calculation** to one of the following methods:

Method 1: Automatic (Equalize Price Ranges)

Set **Price Navigation Steps Calculation** to "Automatic (Equalize Price Ranges.)" This setting uses the existing price layered navigation algorithm, and is similar to the Automatic option in earlier versions of Magento.

Layered Navigation

Method 2: Automatic (Equalize Product Counts)

1. Set **Price Navigation Steps Calculation** to "Automatic (Equalize Price Ranges)."
2. Set **Display Price Interval as One Price** to "Yes" if you want to display a single price when multiple products with the same price.
3. In the **Interval Division Limit** field, enter the threshold for a number of products within a price range. The range cannot be further split beyond this limit. The default value is 9.

Automatic (Equalize Product Counts)

Method 3: Manual

1. Set **Price Navigation Steps Calculation** to "Manual."
2. Enter a value to determine the **Default Price Navigation Step**.
3. Enter the **Maximum Number of Price Intervals** allowed, up to 100.

Manual

6. When complete, click the **Save Config** button.

Categories

Every product in your catalog must be assigned to at least one category. Before you add products to your catalog, you must first establish the basic category structure of your catalog. The number of subcategory levels that you can have in the top navigation is set in the system configuration.

Categories in Main Menu

Creating Categories

When working in the Admin, the category structure is like an upside-down tree, with the root at the top. Each section of the tree can be expanded and collapsed. Any disabled or hidden categories are grayed out.

Category Structure

Step 1: Create a Category

1. On the Admin menu, select **Catalog > Manage Categories**.
2. Before you begin, set **Choose Store View** to the store or view. By default, the scope of the category configuration is set to "All Store Views."
3. In the category tree, click the category that is to be the parent of the new category. The parent is the level just above the new category.

   If you're starting from the beginning without any data, there might be only two categories in the list: "Default Category," which is the root, and an "Example Category."
4. Click the **Add Subcategory** button.

Category Tree

Step 2: Complete the General Information

1. In the General Information section, do the following:
   a. (Required) Type the **Name** of the category.
   b. (Required) To enable the category, set **Is Active** to "Yes."
   c. You can enter a **URL Key** for the category, or let the system automatically create one that is based on the category name.
2. If supported by your theme, you can display a **Thumbnail** image in the main menu for each category. Click the **Choose File** button and select the image to upload.
3. In the **Description** box, enter a paragraph or two of descriptive text for the category landing page.
4. To display an **Image** at the top of the category landing page, click the **Choose File** button and select the image to upload.
5. Complete the category meta data:
   - Page Title
   - Meta Keywords
   - Meta Description
6. (Required) To include the category in the main menu, set **Include in Navigation Menu** to "Yes."
7. Click the **Save Category** button. Then, take note of the following:

- The new category now appears in the tree. If it's not in the correct position, you can drag it to another location in the tree.
- In addition to the category name, it has an ID number shown in parentheses, just after the name at the top of the page.
- A URL Key that is based on the category name has been generated for the category.

Category URL Key

Step 3: Complete the Display Settings

You can configure the category landing page to display both a static block and product list, or one or the other. A static block can provide additional information, including text, images, and even embedded video.

Display Settings

1. On the **Display Settings** tab, do the following:

   a. Set **Display Mode** to one of the following:

      - Products Only
      - Static Block Only
      - Static Block and Products

   b. If applicable, set **CMS Block** to the static block that you want to appear on the category page.

   c. If you want this category page to display the "Filter by Attribute" section of layered navigation, set **Is Anchor** to "Yes."

   d. Clear the checkbox under **Default Product Listing Sort By**. Then select one of the available values to sort the list. By default, all available attributes are listed. The default values typically include:

- Best Value
- Name
- Price

2. When complete, click the **Save Category** button.

Modifying Categories

After a category is established, it can be edited, moved to another position in the category tree, or deleted from the catalog. However, if your catalog is live, you should consider how the change might impact any existing links to products in the category. For example, if your product URLs include the category path, and the category name is changed, any existing links to products in the category will be broken. To avoid this problem, you can configure your catalog to automatically create a permanent redirect if the URL key changes. You can also use the URL Redirect tool to redirect traffic from an old URL to a new one.

To move a category:

1. On the Admin menu, select **Catalog > Manage Categories**.
2. To move a category, simply drag-and-drop it to a new location. Category order changes are saved automatically.

To delete a category:

1. On the Admin menu, select **Catalog > Manage Categories**.
2. Click to select the category you want to delete.

   A deleted category cannot be restored, so make sure that you have selected the correct category before proceeding.
3. Click the **Delete Category** button to save your changes.

Root Categories

The catalog structure is like an upside-down tree, with the root on top. All categories in your catalog are nested below the root. Because the root category is the highest level of the catalog, your store can have only one root category active at a time. You can, however, create additional root categories for alternate catalog structures, different stores, and views. The root category is not visible to customers in the store, and does not have a URL key.

Root Categories

Step 1: Create a New Root Category

1. On the Admin menu, select **Catalog > Manage Categories**.
2. In the upper-left of the Manage Categories page, click the **Add Root Category** button. Then, do the following:
   a. Enter a **Name** for the root category.
   b. Set **Is Active** to "Yes."
   c. Click the **Choose File** to upload a **Thumbnail Image** for the root category.
   d. Enter a **Description** of the root category.
   e. Click the **Choose File** button to upload an **Image** to the root category.
   f. Complete the following meta data:
      - Page Title
      - Meta Keywords
      - Meta Description

g. If you want this root category to be in the main menu, set **Include in Navigation Menu** to "Yes."

3. Click the **Display Settings** tab. Then, set **Is Anchor** to "Yes."
4. When complete, click the **Save Category** button.

Step 2: Add Subcategories to the New Root

1. From the Categories page, click the General tab.
2. In the category tree on the left, click to select the new root category you created in the last step.
3. Click the **Add Subcategory** button.
4. Give the subcategory a **Name**, and set **Is Active** to "Yes."
5. Click the **Save Category** button.
6. Repeat this process to create as many subcategories as you need.

Step 3: Apply the New Root Category to Your Store

1. On the Admin menu, select **System > Manage Stores**.
2. On the Manage Stores page, under Store Name, click the **Main Store** link.
3. Change **Root Category** to the new root category.
4. Click the **Save Store** button.

Hidden Categories

There are many ways to use hidden categories. You might want to create additional category levels for your own internal purposes, but show only the higher-level categories to your customers. Or, you might want to link to a category that is not included in the navigation menu.

To create hidden categories:

1. On the Admin menu, select **Catalog > Manage Categories**.
2. In the Categories panel on the left, select the category you want to exclude from the navigation.
3. On the **General Information** tab, do the following:
   a. Set **Is Active** to "No."
   b. Set **Include in Navigation Menu** to "No."
4. On the **Display Settings** tab, set **Is Anchor** to "No."
5. Although the category is hidden, you can still create additional subcategories beneath it, and make them active. Complete the following settings for each hidden subcategory:
   a. On the **General Information** tab, set **Is Active** to "Yes."
   b. On the **Display Settings** tab, set **Is Anchor** to "Yes."

   As active categories, you can now link to them from other places in your store, but they will not appear in the navigation menu.
6. When complete, click the **Save Category** button.

General Information

On the General Information tab, complete the basic information about the category you are creating or editing. You can enter keywords to improve the way the category is indexed by search engines, create a URL key for the category, and activate or deactivate the category.

General Information

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Name	Store View	(Required) The category name appears in the navigation, and also in the URL key of the category page and associated product pages.
Is Active	Store View	(Required) To make this category available, select “Yes.” Options include: Yes / No
URL Key	Store View	The URL Key is a relative path to the category, and is automatically generated when the

FIELD	SCOPE	DESCRIPTION
		category is saved. The URL Key must be all lower-case characters, with no spaces. As a best practice, each word is separated by a hyphen. If you edit the default URL key, a custom redirect is created automatically. A root category does not have a URL key.
Thumbnail Image	Store View	If supported by your theme, a thumbnail image can be associated with each category and appear as part of the option in the main menu of the store.
Description	Store View	The category description, if used, appears below the category image- and before the product list.
Image	Store View	The category image, if used, appears at the top of the category page, before the description and product list. As an alternative, you can display a CMS static block in place of the description and image. (See Category Display Settings.)
Page Title	Store View	The category page title appears in the browser tab and title bar. As a best practice, the title should be not more than twelve words in length, and should include a combination of primary and secondary keywords.
Meta Keywords	Store View	Keywords are used by some search engines. You can use a keyword search tool to identify high-value keywords that relate to your category. A general rule is to use no more than thirty keywords, or 180 characters. Avoid repeats, and empty words such as “a,” “an,” “or” and “that.”

FIELD	SCOPE	DESCRIPTION
Meta Description	Store View	Enter a description of the category, using approximately twenty-five words or 150 characters.
Include in Navigation Menu	Store View	(Required) Determines if the category is included in the main menu. Options include: Yes — To include this category in the top navigation, select "Yes." No — Hides the category, although still active. Hidden categories appear in layered navigation, but not the main menu.

Display Settings

The Display Settings determine which content elements appear on a category page and the order that products are listed. You can enable CMS blocks, set the anchor status of the category, and manage sorting options from this page.

Display Settings

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Display Mode	Store View	Determines the content elements displayed on the category page. Options include: Products Only Static Block Only Static Block and Products
CMS Block	Store View	To display a CMS static block at the top of the category page, select the name of the block

FIELD	SCOPE	DESCRIPTION
		from the list.
Is Anchor	Global	When set to "Yes," includes the "filter by attribute" section in the layered navigation. Options include: Yes / No
Available Product Listing Sort By	Store View	(Required) The default values are set to set to Value, Name, and Price. To customize the sorting option, clear the Use All Available Attributes checkbox and select the attributes you want to use. You can define and add attributes as needed.
Default Product Listing Sort By	Store View	(Required) To define the default "Sort By" option, clear the "Use Config Settings" checkbox and select an attribute.
Layered Navigation Price Step		By default, Magento displays the price range in increments of 10, 100, and 1000, depending on the products in the list. To change the Price Step range, clear the "Use Config Settings" checkbox.

Custom Design

The Custom Design tab gives you control over the look and feel of a category and all assigned product pages, including the content blocks and page layout.

You can customize a category page its assigned products for a promotion or to differentiate the category from others and increase sales. For example, you might develop distinctive design for a brand or special line of products.

Custom Design

To create a custom category design:

1. If the parent category of the selected category has already been customized and you want to use same settings, set **Use Parent Category Settings** to "Yes."
2. To apply the custom design to all the products assigned to the category, set **Apply to Products** to "Yes." Otherwise, the customization applies to only the category page.
3. To apply a different theme to the category, select the theme you want to use from the **Custom Theme** list.
4. To apply the category design to a specific range of time, click the calendar to select both the **Active From** and **Active To** dates. Otherwise, the design will take effect when you save the changes to the category.
5. Click the **Save Category** button to save your changes.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Use Parent Category Settings	Store View	To inherit the design settings from the parent category set this option to "Yes." Options include: Yes / No
Apply to Products	Store View	To apply the custom settings to all products in the category, set to "Yes." Options include: Yes / No
Custom Theme	Store View	Select the custom theme you want to apply from the list of available themes.
Active From	Store View	If applying a custom theme for a period of time, enter the beginning date, or select the date from the calendar.
Active To	Store View	If applying a custom theme for a period of time, enter the ending date, or select the date from the calendar.
Page Layout	Store View	To apply a different layout to the category page, select one of the following:

FIELD	SCOPE	DESCRIPTION	
		No layout updates	This option is preselected by default and does not apply layout changes to the category page.
		Empty	This option lets you define your own page layout.(Requires an understanding of XML.)
		1 column	Applies a one-column layout to the category page.
		2 columns with left bar	Applies a two-column layout with a left sidebar to the category page.
		2 columns with right bar	Applies a two-column layout with a right sidebar to the category page.
		3 columns	Applies a three-column layout to the category page.
Custom Layout Update	Store View	You can further customize the theme by making layout updates in XML code.	

Category Products

The Category Products tab lists the products that are currently assigned to the category. From the list, you can easily add and remove products from the category.

Category Products

To assign products to a category:

1. From the category record, click the **Category Products** tab. Then, do the following:
   a. Use the filters and checkbox control to find the products you want to assign:
      - To display all products assigned to the category, set the checkbox control to “Yes.”
      - To display all products not assigned to the category, set the checkbox control to “No.”
      - To display all products, set the checkbox control to “Any.”
   b. Press the **Search** button.
   c. To list all products again, click the **Reset Filter** button.
2. Select the checkbox of each product you want to assign to the category.
3. When complete, click the **Save Category** button.

Category Permissions

Category permissions allow you to control access by customer group. After completing the general category permission settings, you can fine-tune the permissions for each category.

To define category permissions:

1. On the Admin menu, select **Catalog > Categories > Manage Categories**.
2. In the category tree, click to select the category.
3. Click the **Category Permissions** tab. Then, click the **New Permission** button and do the following:

Add New Permission

   a. Select the **Website** where the permission applies.
   b. Select the **Customer Group** to which the permission applies.
   c. Under **Browsing Category**, choose one of the following options:

Allow	Allows products in the category to be browsed.
Deny	Does not permit the category to be browsed.
Use Parent	Applies the parent category permissions.

   d. Under **Display Product Prices**, choose one of the following options:

Allow	Displays category prices.
Deny	Does not display category prices.
Use Parent	Applies the parent category permissions.

   e. Under **Add to Cart**, choose one of the following options:

Allow	Allows products in the category to be placed in the shopping cart.
Deny	Does not allow products from the category in the shopping cart.
Use Parent	Applies the parent category permissions.

4. To add more permissions, click the **New Permission** button and repeat the process.
5. When complete, click the **Save Category** button.

Chapter 10:

Managing Attributes

Attributes are the building blocks of your product catalog, and describe specific characteristics of a product. Here are a few ways you can use attributes to enhance the shopping experience:

- Input controls for product options
- Provide additional information on product pages
- Search parameters
- In product comparison reports
- As layered navigation “Shop By” parameters
- In catalog and shopping cart price rules

Each attribute contains a value that describes a characteristic of a product, such as “color” or “fabric.” The “color” attribute with the “dropdown” input type might contain many values, although only a few apply to any given product. Because a single attribute can be used with multiple products, your store needs to have only one attribute for color.

You can create as many attributes as you need, and assign the most common value as the default, to make it easy for your customers to select the option.

The attributes that make up a product are combined into an attribute set, which is used as template to create new products. The attribute set determines which fields are included in a product, and how they are grouped in the Product Information panel. Magento has a default attribute set with a standard selection of product attributes such as Name, Price, Description, and so on. If you want to keep it simple, you can use the default attribute set for your entire catalog.

Attribute Input Types

When viewed from the Admin, attributes are the fields that you complete when you create a product. The input type that is assigned to an attribute determines the type of data that can be entered and the format of the field or input control. To the customer, attributes provide information about the product, and are the options and data entry fields that must be completed to purchase a product.

INPUT TYPE	DESCRIPTION
Text Field	A single line input field for text.
Text Area	A multiple-line input field for entering paragraphs of text such as a product description. You can use the WYSIWYG Editor to format the text with HTML tags, or type the tags directly into the text.
Date	Fields used for entering date values are followed by an icon that displays either a calendar or list of dates when clicked. Depending on your system configuration,a date can be typed directly into the field, or selected from the calendar or list.
Yes / No	Displays a drop-down list with predefined options of “Yes” and “No.”
Dropdown	Displays a drop-down list of values. Only one item can be selected at a time. The Dropdown input type is a key component of configurable products.
Multiple Select	Displays a drop-down list of values. To select more than one option, hold the Ctrl key down and click each item.
Price	This input type is used to create price fields that are in addition to the predefined attributes, Price, Special Price, Tier Price and Cost. The currency used is determined by your system configuration.
Media Image	Gives you the ability to associate an image with a product, that is something other than a product image. For example, you might include the product logo, care instructions, or an image of the ingredients from a food label. When you add a media image attribute to the attribute set of a product, it becomes an additional image type, along with Base, Small, and Thumbnail. The media image attribute can be excluded from the thumbnail gallery, but is still available to be used.
Fixed Product Tax	Lets you define FPT rates based on the requirements of your locale. To learn more, see: General Tax Settings.

Creating Attributes

The properties of an attribute determine how it can be used in your catalog and how it appears throughout your store. In addition to the basic properties, there are additional properties for drop-down and multiple-select input types, their values, and associated labels. The title, or label, identifies the attribute in the Admin and your storefront. If your store is available in multiple languages, you can enter a different translated label for each language.

Attributes can be created using the Manage Attributes tool, and also from inside a product record.

Manage Attributes

Step 1: Define the Attribute Properties

1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**. Then, click the **Add Attribute** button.
2. In the Attribute Properties section, complete the following required (*) properties:
   a. Enter a unique **Attribute Code** to identify the attribute internally. The code should be all lowercase characters without spaces.
   b. In the **Apply To** list, choose each product type that is associated with the attribute.

Attribute Properties

3. Complete the remaining Attribute Properties as needed.

   a. Set **Scope** to the indicate where the attribute will be available.

   b. Set **Catalog Input Type for Store Owner** to the type of input control used by the store administrator during data entry.

   c. To prevent duplicate values from being entered in this field, set **Unique Value** to "Yes."

   d. To require that a value must be entered in the field before the record can be saved, set **Values Required** to "Yes."

   e. To run a validity test of data entered into the field, set **Input Validation for Store Owner** to the type of data the attribute should contain.

4. In the Frontend Properties section, complete as many of the settings as needed.

Frontend Properties

Step 2: Define the Label and Values

1. In the Attribute Information panel on the left, select **Manage Label / Options**. Then, do the following:
   a. In the Manage Titles section, under Admin, enter a descriptive label to identify the field during data entry.
   b. The next column determines how the label appears in your storefront. You can leave the box blank to use the Admin label as the default.
   c. If your store is available in multiple languages, enter a translated label into each box, as needed.
2. For drop-down or multiple-select input types, do the following:
   a. In the Manage Options section, click the **Add Option** button.
   b. In the new row, under **Admin**, type the value you want to use in your store's Admin.
   c. Enter the value you want your customers to see. (Leave blank to use the Admin value as the default.)
   d. If applicable, enter a translated value for each language supported.
   e. Enter a number to determine the **Position** of this value in relation to other options in the list.
   f. Select **Is Default** to automatically select this value.
   g. Repeat these steps for each value you want to add to the list.

Manage Label / Options for Dropdown Input Type

3. When complete, click the **Save Attribute** button.

   The attribute appears in the Manage Attributes list, sorted in alphabetical order by Attribute Code. Use the Page controls to view each page of the list.

Deleting Attributes

If you created sample data while setting up your store, it is possible that you now have some attributes that aren't needed for your catalog. When an attribute is deleted, it is removed from any related products and attribute sets. System attributes are part of the core functionality of your store and cannot be deleted.

To delete an attribute:

1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
2. In the list, find the attribute and click to open the record.
3. Click the **Delete Attribute** button.
4. When prompted to confirm, click **OK**.

Creating an Attribute Set

One of the first steps when creating a product is to choose the attribute set that is used as a template for the product record. The attribute set determines the fields that are available during data entry, and the values that appear to the customer.

Manage Attribute Sets

Your store comes with an initial attribute set called "default" which contains a set of commonly-used attributes. If you would like to add only a small number of attributes, you can add them to the default attribute set. However, if you sell products that require specific types of information, such as cameras, it might be better to create a dedicated attribute set that includes the special attributes (fields) needed to describe the product.

A single attribute can be used by as many different attribute sets as is necessary. For example, the attribute "color" can be included in an attribute set for clothing, paint, or for any number of different products.

To create an attribute set:

1. On the Admin menu, select **Catalog > Attributes > Manage Attribute Sets**.
2. Click the **Add New Set** button. Then, do the following:

Edit Set Name

   a. Enter a **Name** for the attribute set.
   b. In the **Based On** field, select another attribute set from which this attribute set is to inherit attributes. This option enables you to reuse the attributes already defined in a set to build other attribute sets. The simple option is to leave the Default option that appears in this field.

3. Click the **Save Attribute Set** button. The next page displays the following:
   - The top left of the page shows the name of the attribute set defined earlier. You have the option to edit the name because this value is for internal use.
   - The center of the page shows a hierarchical tree representing Groups for attributes.
   - The right side of the page shows a list of defined attributes that are not assigned to this attribute set.
4. Select the attribute to be assigned to this Group by dragging them from the **Unassigned Attributes** area on the right into the relevant **Group** in the middle of the page.

   System Attributes are marked with a dot and cannot be removed from the Groups list. However, you can drag them to another Group in the attribute set.
5. When the attribute set is complete, click the **Save Attribute Set** button.

Edit Attribute Set

To create a new attribute group:

1. In the Groups section of the attribute set, click the **Add New** button.
2. Enter a **Name** for the new group, and click **OK**.
3. Do either of the following:
   - Drag **Unassigned Attributes** to the new group.
   - Drag attributes from any other group to the new group.

The new group becomes a section in the Product Information panel for any product that is based on this attribute set.

Attribute Quick Reference

Product Type Properties

PROPERTY	DESCRIPTION
Apply To	Identifies the product types that can use the attribute. Visibility must be set to include the catalog.
Use to Create Configurable Product	Identifies the attribute one that will be used to create a drop-down list of options for a configurable product.

Data Entry Properties

PROPERTY	DESCRIPTION
Default Value	Displays a common entry as a starting value.
Unique Value	Prevents duplicate values from being entered.
Values Required	Requires a value to be entered before the record can be saved.
Input Validation	Performs a validation check of the data, based on data type, or format.

Search and Navigation Properties

PROPERTY	DESCRIPTION
Use in Quick Search	Lets customers use the Search box to find items based on the value of the attribute.
Use in Advanced Search	Includes the attribute as a field on the Advanced Search form.
Use in Layered	Includes the attribute in the layered navigation that is

PROPERTY	DESCRIPTION
Navigation	
Use in Search Results Layered Navigation	Includes the attribute in the layered navigation that is displayed for search results lists.
Position	Determines the position of the attribute when listed with others in the layered navigation list.
Use in Product Listing	(Depending on theme) Includes the attribute in the product listing.
Use for Sorting in Product Listing	(Depending on theme) Includes this attribute as an option in the Sort By list, which can be used to sort a product list.

Rules and Comparison Properties

PROPERTY	DESCRIPTION
Comparable on Front-end	Includes the attribute in the Compare Products report.
Use for Promo Rule Conditions	Allows the attribute to be used as the basis of a condition that triggers a promotional Price Rule or Shopping Cart rule.

Presentation Properties

PROPERTY	DESCRIPTION
Visible on Product View Page	Includes the attribute on the Additional Information tab of the product view page.
Allow HTML Tags on Frontend	Permits text fields and areas to be manually tagged with HTML.
Enable WYSIWYG Editor	Makes the WYSIWYG Editor available for tagging a text field or text area with HTML.

Attribute Properties

The Attribute Properties define the individual characteristics that determine how an attribute can be used in the product catalog.

Attribute Properties

Property Descriptions

PROPERTY	DESCRIPTION
Attribute Code	(Required) A unique identifier for internal use. The Attribute Code must begin with a letter, but can include a combination of lowercase letters (a-z) and numbers (0-9). The code must be less than thirty characters in length and cannot include any special characters or spaces, although an underscore (_) can be used to indicate a space.
Scope	Limits the use of an attribute to a specific store view or website. Options include: Store View / Website / Global
Catalog Input Type for Store Owner	Determines the data type and input control that is used to manage the product from the store Admin. Options include: Text Field — A single line input field for text. Text Area — A multiple-line input field that can display paragraphs of text formatted with HTML. Date — An input field for date values. The date can be typed directly into the field, or selected from a list or calendar. Yes/No — A drop-down list with predefined options of “Yes” and “No.”

PROPERTY	DESCRIPTION	
	Dropdown	A drop-down list of configurable options, from which only one can be selected.
	Multiple Select	Displays a drop-down list of configurable options. To select more than one option, hold down the Ctrl key and click each item.
	Price	An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.
	Media Image	An additional image that can be included in the attribute set of a product.
	Fixed Product Tax	An input type that gives you the ability to define FPT rates based on the requirements of your locale.
Default Value	Assigns a starting value to the attribute to help during data entry. To assign a default value for Multiple Select or Dropdown input types, see: Creating Attributes. A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.	
Unique Value	To prevent duplicate values in a data entry field, set Unique Value to “Yes.” Options include: Yes / No	
Values Required	To require that a value to be entered in this field before the record can be saved, set Values Required to “Yes.” Options include: Yes / No	
Input Validation for Store Owner	Performs a validation check of the data entered in the field, based on the following options: None Decimal Number Integer Number Email URL Letters	

PROPERTY	DESCRIPTION
	Letters (a-z, A-Z) or Numbers (0-9)
Apply To	(Required) Identifies the product types to which this attribute applies. Options include: All Product Types Selected Product Types Simple Product Grouped Product Configurable Product Virtual Product Bundle Product Downloadable Product Gift Card
Use to Create Configurable Product	(Dropdown input type only) Select "Yes" if this attribute will be used to create a drop-down list for a configurable product. Options include: Yes / No

Attribute Frontend Properties

The Frontend Properties determine how an attribute can be used in your store. You can specify how attributes are used in search, layered navigation, product comparisons, price rules, and sorting. For text attributes, you can enable the WYSIWYG editor and specify if HTML tags can be used to format the value.

Frontend Properties

Property Descriptions

PROPERTY	DESCRIPTION
Use in Quick Search	Select "Yes" if you want people to be able to search the catalog based on the value of this attribute. Options include: Yes / No
Search Weight	(Solr Only) Assign a value from 1 – 5 to weight the search.
Use in Advanced Search	Gives shoppers the ability to enter their search criteria through a form. Options include: Yes / No Using too many attributes can slow down search.
Comparable on Front-end	Select "Yes" to include this attribute as a row in the Compare Products report. Options include: Yes / No
Use In Layered Navigation	(Dropdown, Multiple Select and Price input types only) Includes the attribute as a filter in the "Shop By" section of layered navigation. Options include: No — The attribute is not used in layered navigation. Filterable (with results) — Lists only products that match the filter value. Filterable (no results) — Lists all attribute values, even those that do not apply to any product in the list. Layered navigation appears on a category page only if there are filterable attributes available.
Use In Search Results Layered Navigation	To include the attribute in the layered navigation for search results, select "Yes." Options include: Yes / No
Use for Promo Rule Conditions	To make the attribute available for use in price rules, select "Yes." Options include: Yes / No
Position	Determines the position of the attribute in layered navigation in relation to other filterable attributes.
Enable WYSIWYG	(Text Area input type only) To display the editor when entering or editing the attribute value, select "Yes." The editor can be used to format field descriptions with HTML tags. Options include: Yes / No

PROPERTY	DESCRIPTION
Allow HTML Tags on Frontend	(Text Field and Text Area input types only) To be able to format the attribute value with HTML tags, select "Yes." Options include: Yes / No
Visible on Product View Page on Front-end	(Simple and virtual products only) To include the attribute on the Additional Information tab of the product page, select "Yes." Options include: Yes / No
Used in Product Listing	Depending on the theme, includes the attribute in the product summary that appears in catalog listings, and also makes the attribute available for use in smart category rules. Options include: Yes / No
Used for Sorting in Product Listing	Depending on theme, includes the attribute as a "Sort By" option for catalog listings. Options include: Yes / No

Chapter 11:

Flat Catalog

Magento uses the Entity-Attribute-Value (**EAV**[1]) model for storing customer, product, and category data in its database. Although the EAV model enables you to have completely extensible attributes for those objects, object attributes are stored in multiple tables rather than one very large table.

Because attributes are stored in many tables—and that includes copies of some of the same attributes—SQL queries can be long and complex. The flat catalog feature creates new tables on the fly, where each row contains all necessary data about a product or category.

In earlier versions of Magento, it was necessary to rebuild the flat catalog every time you made changes to product attributes or product-category associations. In this release, the flat catalog is updated for you—either every minute, or according to your Magento cron job.

Flat catalog options not only enable the flat catalog and flat product indexers but also enable indexing for catalog and shopping cart price rules. If you have a large number of SKUs (500,000 or more), Magento can index catalog and shopping cart price rules quickly if you enable the flat catalog product option.

[1] Entity Attribute Value

Setting Up a Flat Catalog

Before you enable a flat catalog for a live store, make sure to test the configuration in a development environment.

Use Flat Catalog

Step 1: Enable Flat Catalog

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Frontend** section. Then, do the following:
   a. Set **Use Flat Catalog Category** to "Yes."
   b. Set **Use Flat Catalog Product** to "Yes."
4. When complete, click the **Save Config** button.
5. When prompted to refresh the Page Cache, click the **Cache Management** link in the message at the top of the workspace and follow the instructions.

Step 2: Verify the Results

Method 1: Verify the Results for a Single Product

1. Open one browser tab to the store Admin, and log in as an administrator.
2. On a second browser tab, navigate to your store's home page.
3. On the Admin menu, select **Catalog > Manage Products**. Then, do the following:
   a. Choose a product to modify. Then, click to open the product in edit mode.
   b. On the General tab, in the Name field, add the text "_DEMO" to the product name.

4. Click the **Save** button.
5. In your store, search for the product you edited, and browse to its assigned category.

   If necessary, refresh the page to see the result of the change you made. The change occurs either within the minute or according to your cron job schedule.

Method 2: Verify the Results for Multiple Products

1. On a second browser tab, navigate to your store's home page.
2. On the Admin menu, select **Catalog > Categories > Manage Categories**.
3. In the upper-left corner, set **Current Configuration Scope** to one of the following:
   - All Store Views
   - A specific store view
4. In the panel on the left, select an existing category. Click the **Add Subcategory** button, and do the following:
   a. In the **Name** field, enter "Demo Category."
   b. Set **Is Active** to "Yes."
   c. Click the **Save Category** button.

New Subcategory

   d. Click the **Category Products** tab. Then, click the **Reset Filter** button to display all products.
   e. Select the checkbox of several products to add them to the new category. Then, click the **Save Category** button.

Category Products

5. In your store, locate the category you created.

   If necessary, refresh the page to see the result of the change you made. The change occurs either within the minute or according to your cron job schedule.

Chapter 12:

Creating Products

Choosing a product type is one of the first things you must do to create a new product. In this chapter, you will learn how to create a product of each type. To learn more about all the available options, see Product Information.

If you are just starting out, you can create a few sample products, and experiment with each type. Before building your catalog, make sure to read Navigation by Category and Catalog URL Options. This material will give you a good understanding of the relationship between your store navigation, the categories in your catalog.

Products in Catalog

Product Types

Simple Product

A simple product is a physical item with a single SKU. Simple products have a variety of pricing and of input controls which makes it possible to sell variations of the product. Simple products can be used in association with grouped, bundle, and configurable products.

Grouped Product

A grouped product presents multiple, standalone products as a group. You can offer variations of a single product, or group them for a promotion. The products can be purchased separately, or as a group.

Configurable Product

A configurable product appears to be a single product with lists of options for each variation. However, each option represents a separate, simple product with a distinct SKU, which makes it possible to track inventory for each variation.

Virtual Product

Virtual products do not have a physical presence, and are typically used for such things as services, warranties, and subscriptions. Virtual products can be used in association with grouped and bundle products.

Downloadable Product

A digitally downloadable product that consists of one or more files that are downloaded. The files can reside on your server or be provided as URLs to any other server.

Bundle Product

A bundle product let customers "build their own" from an assortment of options. The bundle could be a gift basket, computer, or anything else that can be customized. Each item in the bundle is a separate, standalone product.

Gift Card Product

There are three kinds of gift cards: virtual gift cards are sent by email, physical gift cards are shipped to the recipient, and combined gift cards are a combination of the two. Each has a unique code, which is redeemed during checkout. Gift cards can be used in association with grouped products.

Simple Product

One of the keys to harnessing the power of product types is learning how and when to use a simple, standalone product. Simple products can be sold individually, or as part of a grouped, configurable, or bundle product. A simple product with multiple, custom options is sometimes referred to as a **composite product**[1].

Simple Product

The following instructions take you through the process of creating a simple product with the basic fields. Each required field is marked in the Admin with a red asterisk (*). After you complete the required settings and save the product, you can add images and complete the remaining product information as needed.

Process Overview:

Step 1: Choose the Attribute Set

Step 2: Complete the Basic Information

Step 3: Complete the Remaining Product Information

Step 1: Choose the Attribute Set

The first step is to choose the attribute set, which is used as a template for the product record. The product in this example is based on the Default attribute set, which includes a standard of set of fields that can be used for most products.

[1]Any product type that offers customers a choice of options.

1. On the Admin menu, go to **Catalog > Manage Products**.
2. In the upper-right corner of the Manage Products page, click the **Add Product** button.
3. In the Create Product Settings section, do the following:
   a. Accept the "default" **Attribute Set**, or select another.
   b. Set **Product Type** to "Simple."
   c. Click the **Continue** button.

Step 2: Complete the Basic Information

The basic set of required fields must be completed before the product record can be saved. The Product Information panel groups related fields by topic and the required fields are marked with a red asterisk (*).

1. In the Product Information panel, select **General**. Then, complete the required fields as follows:
   a. Enter the product **Name** as you want it to appear in all catalog listings.
   b. In the **Description** box, enter the main description that will appear on the Product Detail page.
   c. Enter a **Short Description** of the product.
   d. Assign a unique **SKU** for the product.
   e. Enter the **Weight** of the product, which is used to calculate shipping.
   f. Set **Status** to "Enabled."
   g. Set **Visibility** to "Catalog, Search."
2. In the Product Information panel, select **Prices**. Then, complete the required fields as follows:
   a. Enter the **Price** that you will charge for the product.
   b. Set **Tax Class** to the appropriate tax classification for the product.
3. In the Product Information panel, select **Inventory**. Then, do the following:
   a. If you do not need to keep track of inventory for the product, set **Manage Stock** to "No."
   b. If you want to keep track of inventory, set **Manage Stock** to "Yes." Then, do the following:
      - In the **Qty** field, type the quantity of the item that is currently in stock.
      - Set **Stock Availability** to "In Stock."

4. To be visible in your catalog, the product must be assigned to a category. To assign the product to a category, do the following:
   a. In the Product Information panel, select **Categories**.
   b. In the category tree, click to expand the section where the item belongs.
   c. Select the checkbox of each category where you want the product to appear.
5. If your Magento installation has multiple websites, the product must be assigned to each one where the product is available for sale. (This option appears only if multiple websites exist in the store hierarchy.) To configure the scope of the product, do the following:
   a. In the Product Information panel, select **Websites**.
   b. On the Websites tab, select the checkbox of each website where the product is available for sale.
6. After completing these steps, click the **Save and Continue** button.

   At this point, the product should be visible on the assigned category page of your catalog. Until the product image is uploaded, a placeholder appears in its place.

Step 3: Complete the Remaining Product Information

Although not required, there is still more product information to complete. At the very least, you will want to upload product images and complete the meta data. In addition, you can create additional custom options.

Things to Remember

- ☑ A simple product can have custom options with a variety of input controls, which makes it possible to sell many product variations from a single SKU.
- ☑ Custom options are not tracked as separate inventory items.
- ☑ A simple product that is included in a configurable, or bundle product type cannot have custom options.

Grouped Product

A grouped product is made up of multiple, standalone products that are presented as a group. You can offer variations of a single product, or group them by season or theme to create a coordinated set. Each product can be purchased separately, or as part of the group.

Grouped Product

The following instructions take you through the process of creating a grouped product with the basic fields. Each required field is marked in the Admin with a red asterisk (*). After you complete the required settings and save the product, you can add images and complete the remaining product information, as needed.

Process Overview:

Step 1: Create the Grouped Product

Step 2: Add the Associated Products

Step 3: Configure the Shopping Cart Thumbnails

Step 1: Create the Grouped Product

The first step is to choose the attribute set, which is used as a template for the product record. The product in this example is based on the Default attribute set, which includes a standard of set of fields that can be used for most products.

1. On the Admin menu, select **Catalog > Manage Products**. Then, click the **Add Product** button.
2. In the Create Product Settings section, select the **Attribute Set** you want to use as a template for the product.
3. Set **Product Type** to "Grouped Product," and click the **Continue** button.

4. Complete the main configuration settings as you would for a simple product, with the following exceptions:
   - A grouped product does not have price options because the price of each item in the group originates from the associated product.
   - You can set quantity increments and stock availability for the group as a whole, but the inventory of individual items is managed by the associated products.
5. Click the **Save and Continue** button.

Step 2: Add the Associated Products

1. In the Product Information panel on the left, select the associated products.

   If you need help finding the products, use the filter controls at the top of a column.
2. Select the **checkbox** of each product you want to include in the group.
3. Click the **Save** button to save your changes.

Step 3: Configure the Shopping Cart Thumbnails

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Checkout**.
3. Click to expand the **Shopping Cart** section. Then, set **Grouped Product Image** to one of the following:
   - Product Thumbnail Itself
   - Parent Product Thumbnail
4. Click the **Save Config** button to save the setting.

Things to Remember

- ☑ A grouped product is essentially a collection of simple associated products.
- ☑ Simple and virtual products associated with a grouped product cannot have custom options.
- ☑ Each item purchased appears individually in the shopping cart.
- ☑ The thumbnail image in the shopping cart can be set to display the image from the grouped product record, or from the associated product.

Configurable Product

A configurable product looks like a single product with drop-down lists of options for each variation. However, each option is actually a separate simple product with a unique SKU, which makes it possible to track inventory for each product variation. You could achieve a similar effect by using a simple product with custom options, but without the ability to track inventory for each variation.

Although a configurable product uses more SKUs, and may initially take a little longer to set up, it can save you time in the long run. If you plan to grow your business, the configurable product type is a better choice.

Configurable Product

After the configurable product is set up, you have the option to replace the drop-down lists with swatches. Swatches are often used to show colors, patterns, and textures.

The following instructions take you through the process of creating a configurable product with the basic fields. Each required field is marked in the Admin with a red asterisk (*). After you complete the required settings and save the product, you can add images and complete the remaining product information, as needed.

Process Overview:

Step 1: Create Attributes for Drop-down Options

Step 2: Create the Attribute Set

Step 3: Create the Configurable Product

Step 4: Add the Associated Products

Step 5: Make Any Necessary Price Adjustments

Step 6: Configure the Shopping Cart Thumbnails

Step 1: Create Attributes for Drop-Down Options

Create an attribute for each drop-down list of options that you want to include in the configurable product. If the attribute already exists and has the correct properties, you can add it to the attribute set in the next step. To learn more, see: Creating Attributes.

Required Attribute Properties

PROPERTY	SETTING
Scope	Global
Catalog Input Type for Store Owner	Dropdown
Apply to	Configurable Product or All Product Types
Use to Create Configurable Product	Yes

Step 2: Create the Attribute Set

1. On the Admin menu, select **Catalog > Attributes > Manage Attribute Sets**. Then, click the **Add New Set** button.
2. Assign a **Name** to the attribute set.
3. In the **Based On** list, select an existing attribute set, such as "Default," to use as a template. Then, click the **Save Attribute Set** button.
4. Starting from the list of **Unassigned Attributes**, drag and drop each attribute you want to include in the product to the center column. You can arrange them in any order.
5. To group the attributes in their own section of the Product Information panel, do the following:
   a. In the Groups section, click the **Add New** button.

      > If prompted by your browser, select "Temporarily Allow Scripted Windows" to continue. Then, click the Add New button again.

   b. When prompted, enter a **Name** for the new group. Then, click the **OK** button.

      The new group appears at the bottom of the Groups column.

   c. Drag and drop each attribute that you created for the dropdown options to group where you want them to appear.
6. Click the **Save Attribute Set** button.
7. When prompted to update your cache and index, click the links in each message and follow the instructions.

Step 3: Create the Configurable Product

1. On the Admin menu, select **Catalog > Manage Products**. Then, click the **Add Product** button.
2. In the Create Product Settings section, do the following:
   a. Select the **Attribute Set** that you created for the product.
   b. Set **Product Type** to "Configurable Product," and click the **Continue** button.
3. In the Select Configurable Attributes section, select the checkbox of each attribute that you want to include in the product. Then, click the **Continue** button.
4. Complete the Product Information as you would for a simple product, with the exception of the following fields:
   - On the **Prices** tab, the Price is a required field, but is used as a default price. The price of each individual associated product can be adjusted accordingly.
   - On the **Inventory** tab, **Manage Stock** is set to "No" by default, because inventory is managed for each associated product.
5. When complete, click the **Save and Continue Edit** button.

Step 4: Add the Associated Products

Process Overview:

Method 1: Quick Simple Product Creation

Method 2: Create Empty

Method 3: Copy from Configurable

1. In the panel on the left, select the last option, **Associated Products**.
2. Then, use one of the following methods to add the associated products.

Method 1: Quick Simple Product Creation

This method automatically creates the associated products and optionally, assigns a Name and SKU to each one.

1. In the Quick Simple Product Creation section, make sure that the **Autogenerate** checkbox is selected for both **Name** and **SKU**. This optional setting adds the name and SKU from each associated product to those of the configurable product. Then, complete these fields as follows:
   a. Enter the **Weight**.
   b. Set **Status** to "Enabled."
   c. Set **Visibility** to "Not Visible Individually."

2. To complete the fields for the drop-down lists, do the following:
   a. Select the value you need from each list to create the first product.
   b. Enter the **Qty**, and set **Stock Availability** to "In Stock."
   c. Click the **Quick Create** button to create the associated product record.

Repeat this step for the values needed for each associated product. As each associated products is created, it is added to the list at the bottom of the page.

Method 2: Create Simple Associated Product

This method opens a blank Product Information form, which you can complete for each associated product.

1. In the Create Simple Associated Product section, click the **Create Empty** button. A pop-up window with a blank Product Information form appears.
2. Complete the required fields as you would for any simple product.
3. Click the **Save** button to add the associated product.

Method 3: Copy from Configurable

This method opens a Product Information form that contains the values already entered for the configurable product. The only fields that need to be completed are the Name, SKU, and values for each drop-down list.

1. In the Create Simple Associated Product section, click the **Copy From Configurable** button. A pop-up window with the basic Product Information from the configurable product appears.
2. Complete the following required fields:
   - SKU
   - Weight
3. Complete the fields with values for each drop-down list.
4. Click the **Save** button to add the associated product to the configurable product record.

Step 5: Make Any Necessary Price Adjustments

Use the Super Products Attributes Configuration section to make price adjustments to a specific associated product. The adjustment can be entered as a fixed value or percentage, and is made in relation to the price of the configurable product.

Step 6: Configure the Shopping Cart Thumbnails

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Checkout**.
3. Click to expand the **Shopping Cart** section. Then, set **Configurable Product Image** to one of the following:
   - Product Thumbnail Itself
   - Parent Product Thumbnail
4. Click the **Save Config** button to save the setting.

Things to Remember

- A configurable product allows the shopper to select options from drop-down lists. Each option is actually a separate, simple product.
- The drop-down list values are based on attributes that must be set up in advance with required settings. The attribute Scope must be set to "Global," and Use to Create Configurable Product must be "True." The drop-down attributes must be included in an attribute set, which is then used as a template for the configurable product.
- Swatches can be used instead of drop-down lists for product variations.
- The simple products associated with a configurable product cannot include custom variants or options, and must be based on the same attribute set that is used to create the configurable product. The associated products can be generated automatically from inside with configurable product record.
- The thumbnail image in the shopping cart can be set to display the image from the configurable product record, or from the associated product.

Virtual Product

Although virtual products are not physical in nature, they do represent something that can be sold, such as a membership, service, warranty, or subscription. Virtual products can be sold individually, or included as part of the following product types:

- Grouped Product
- Bundle Product

The process of creating a virtual product and a simple product is nearly the same. However, because a virtual product is not shipped, there is no Weight field or option to include a gift card.

Virtual Product

The following instructions take you through the process of creating a virtual product with the basic fields. Each required field is marked in the Admin panel with a red asterisk (*). After you complete the required settings and save the product, you can complete the remaining product information as needed.

Process Overview:

Step 1: Choose the Attribute Set

Step 2: Complete the Required Fields

Step 3: Complete the Remaining Product Information

Step 1: Choose the Attribute Set

1. On the Admin menu, select **Catalog > Manage Products**.
2. In the upper-right corner of the Manage Products page, click the **Add Product** button.
3. In the Create Product Settings section, do the following:
   a. Accept the "default" **Attribute Set**, or select another.
   b. Set **Product Type** to "Virtual Product."
   c. Click the **Continue** button.

Step 2: Complete the Required Fields

The panel on the left groups related fields by topic, according to the attribute set. All required fields are marked with a red asterisk (*).

1. On the **General** tab, complete the required fields as follows:
   a. Type the product **Name** as you want it to appear in all catalog listings.
   b. In the **Description** box, enter the main description that will appear on the product view page.
   c. Enter a **Short Description** of the product.
   d. Assign a unique **SKU** to the product.
   e. Set **Status** to "Enabled."
   f. Set **Tax Class** to the appropriate setting for your area.
   g. Set **Visibility** to "Catalog, Search."
2. On the **Prices** tab, enter the Price you intend to charge for the product or service.
3. If you're not going to manage your inventory, you can skip this section. Otherwise, complete the required fields on the **Inventory** tab as follows:
   a. Under Manage Stock, clear the **Use Config Settings** checkbox. Then, set **Manage Stock** to "Yes."
   b. In the **Qty** field, enter the quantity of the item currently in stock.
   c. Set **Stock Availability** to "In Stock."
4. If applicable, on the **Website** tab, select the checkbox for the website where the product or service will be available for sale.
5. On the **Categories** tab, assign the product to the appropriate categories, as follows:

a. In the Product Category tree, click to expand the section where the item belongs.

b. Select the checkbox to assign the product to each category where you want the product to be listed in the catalog.

6. When the required fields are complete, click the **Save and Continue** button.

Step 3: Complete the Remaining Product Information

You have now completed the required fields. The next step is to complete the rest of the product information as needed for this product. The meta information and product images are a good place to start.

Things to Remember

- Virtual products can be used for anything that is not physical in nature, such as services, subscriptions, and warranties.
- Virtual products are much like simple products, but without the Weight and Allow Gift Message fields.
- Shipping Options appear during checkout only if there is also a physical product in the cart.

Bundle Product

A bundle is a "build your own," customizable product. Each item in a bundle can be based on one of the following product types:

- Simple Product
- Virtual Product

Bundle Product

The following instructions take you through the process of creating a bundle product with the basic fields. Each required field is marked with a red asterisk (*). After you complete the required settings and save the product, you can complete the remaining Product Information as needed.

Process Overview:

Step 1: Create the Bundle Product

Step 2: Complete the Product Information

Step 3: Add Bundle Items

Step 1: Create the Bundle Product

1. On the Admin menu, select **Catalog > Manage Products**. Then, click the **Add Product** button.
2. In the Create Product Settings section, select the **Attribute Set** for the product.
3. In the Create Product Settings section, do the following:
   a. Accept the "default" **Attribute Set**, or select another.
   b. Set **Product Type** to "Bundle Product." Then, click the **Continue** button.

Create Product Settings

Step 2: Complete the Product Information

1. Complete the product information as you would for a simple product, with the exception of the following fields:
2. On the **General** tab, set both the **SKU** and **Weight** fields to one of the following:
   - Dynamic
   - Fixed

   If using a Fixed value, enter the actual value in the field to the right.

Dynamic SKU and Weight

3. On the **Prices** tab, set **Price** to one of the following:
   - Dynamic
   - Fixed

   If using a Fixed value, enter the actual value in the field to the right.

Dynamic Price

4. Then, set the **Price View** to one of the following:
   - As Low as
   - Price Range
5. Click the **Save and Continue Edit** button.

Step 3: Add Bundle Items

1. In the Product Information panel on the left, select the last option, **Bundle Items**.
2. Then in the Shipment section, set **Ship Bundle** Items to one of the following:
   - Together
   - Separately

Shipment

3. In the Bundle Items section, click the **Add New Option** button.
4. In the **Default Title** box, enter a label for the bundle item, as you want it to appear on the Customize Product page. Then, do the following:

Bundle Items

   a. Set **Input Type** to one of the following:
      - Drop-down
      - Radio Buttons
      - Checkbox
      - Multiple Select
   b. Set **Is Required** as needed.
   c. In the **Position** field, enter the order that you want this item listed in relation to other items included in the bundle.
5. Click the **Add Selection** button. Then, do the following:

Select Products

a. Click the **Reset Filter** button to display the list of products.

b. Select the checkbox of each product that you want to include in this item.

c. In the **Qty to Add** column, enter the quantity of each item to be included.

6. Click the **Add Selected Product(s) to Option** button.

7. When the items appear in the Bundle Items list, do the following:

   a. Set **User Defined Qty** to one of the following:

Yes	Displays an input box so the customer can change the quantity.
No	Prevents the customer from changing the default quantity.

   b. Enter a number in the **Position** column of each item to determine its place in relation to other items.

   c. To make an item the default selection, select the **Default** option of the item to be pre-selected in the form.

Bundle Items

8. Repeat steps 3-7 for each bundle item you want to include.

9. When complete, click the **Save** button to save the bundle product.

Field Descriptions

FIELD	DESCRIPTION
SKU	Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.
Weight	Specifies the weight is calculated based on the items selected, or is a fixed weight for the entire bundle. Options include: Fixed / Dynamic.
Price View	Specifies whether the product price is shown as a range, from the least expensive component to the most expensive (Price Range), or the least expensive shown (As Low As). Options include: Price Range / As Low As.
Ship Bundle Items	Specifies if individual items can be shipped separately.

Things to Remember

- A bundle is a “build your own” product.
- Bundle items can be simple or virtual products, but without custom options.
- The Price View can be set to a price range or “As Low As.”
- The SKU and Weight of a bundle product can be set to either “Fixed” or “Dynamic.”
- The Quantity can be set to a preset or user-defined value.
- Items can be shipped together or separately.

Downloadable Product

A downloadable product can be anything that you can deliver as a file, such as an eBook, music, video, software application, or an update. You can offer an album for sale, and sell each song individually. You can also use a downloadable product to deliver an electronic version of your product catalog.

Because the actual download doesn't become available until after the purchase, you can provide samples, such as an excerpt from a book or a clip from an audio file, that the customer can try from the product page.

Download with Sample

Downloadable products can be configured to require that the customer log in to an account to receive the link, or can be sent by email and shared with others. The status of the order before the download becomes available, default values, and other delivery options are set in the configuration.

The files for download can be either uploaded to your server, or linked to on a different server on the Internet.

> Downloadable product file names can include letters and numbers. You can to use either a dash or underscore character to represent a space between words. Any invalid characters in the file name are replaced with an underscore.

The following instructions take you through the process of creating a downloadable product with the basic fields. Each required field is marked in the Admin with a red asterisk (*). After you complete the required settings and save the product, you can add images and complete the remaining product information as needed.

Process Overview:

Step 1: Choose the Attribute Set
Step 2: Complete the Basic Product Information
Step 3: Complete the Download Information
Step 4: Complete the Samples Information
Step 5: Complete the Remaining Product Information

Step 1: Choose the Attribute Set

The first step is to choose the attribute set, which is used as a template for the product record. The product in this example is based on the Default attribute set, which includes a standard of set of fields that can be used for most products.

1. On the Admin menu, go to **Catalog > Manage Products**.
2. In the upper-right corner of the Manage Products page, click the **Add Product** button.
3. In the Create Product Settings section, do the following:
   a. **Attribute Set** is currently set to "Default." You can leave it as it is, or select another.
   b. Set **Product Type** to "Downloadable Product," and click the Continue button.

Create Product Settings

Step 2: Complete the Basic Product Information

The basic set of required fields must be completed before the product record can be saved. The Product Information panel groups related fields by topic and the required fields are marked with a red asterisk (*).

1. In the Product Information panel, select **General**. Then, do the following:
   a. Enter the product **Name** as you want it to appear in all catalog listings.
   b. In the **Description** box, enter the main description for the Product Detail page.
   c. Enter a **Short Description** of the product.
   d. Assign a unique **SKU** for the product.
   e. Set **Status** to "Enabled."
   f. Set **Visibility** to "Catalog, Search."

2. In the Product Information panel, select **Prices**. Then, complete the required fields as follows:
   a. Enter the **Price** that you will charge for the product.

      The price entered becomes the base price of the download and is listed in the catalog before the customer selects items for download. Any additional price that is associated with an individual download is added to the base price.

   b. Set **Tax Class** to the appropriate tax classification for the product.
3. In the Product Information panel, select **Inventory**. Then, do the following:
   a. To not keep track of inventory for the product, set **Manage Stock** to "No."
   b. If you do need to keep track of inventory, set **Manage Stock** to "Yes." Then, do the following:
      - Set **Manage Stock** to "Yes."
      - In the **Qty** field, type the quantity of the item that is currently in stock.
      - Set **Stock Availability** to "In Stock."
4. In the Product Information panel, select **Categories**. Then, do the following:
   a. In the category tree, click to expand the section where the item belongs.
   b. Select the checkbox of each additional category where you want the product to appear.
5. To make the product available on multiple websites, it must be assigned to each one. (This option appears only if you have multiple websites.) To configure the scope of the product, do the following:
   a. In the Product Information panel, select **Websites**.
   b. Select the checkbox of each website where the product will be available for sale.
6. After completing these steps, click the **Save and Continue Edit** button.

Step 3: Complete the Download Information

1. In the Product Information panel, select **Downloadable Information**.
2. In the Links section, do the following:
   a. Enter a **Title** for the list of downloadable products.
   b. Set **Links can be purchased separately** to one of the following:
      - If you want to offer multiple download links, such as to sell individual songs on an album, select "Yes."
      - To offer a single download of this item, select "No."

3. Click the **Add New Row** button, and do the following:
   a. Enter the **Title** and **Price** of the download.
   b. To limit the number of downloads per customer, enter the **Max number of downloads**. To allow unlimited downloads, select the **Unlimited** checkbox.
   c. Set **Sharable** to your preference.
      - Select "No" to require that customers log in to their accounts to access the download link.
      - Select "Yes" to send the link by email, which customers can then share with others.
4. Under **Sample**, use one of the following methods to deliver a sample of the downloadable product.
   - Select the **File** option. Then, click the **Browse** button, and select the sample file to upload to the server.
   - Select the **URL** option. Then, paste the full **URL** of the sample file.
5. Under **File**, use one of the following methods to deliver the actual downloadable product.
   - Select the **File** option. Then, click the **Browse** button, and select the file to upload.
   - Select the **URL** option. Then, paste the full **URL** of the file that is available for download.
6. In the **Sort Order** field, enter a number to indicate the sequence that this download will be listed with other downloads on the product page.
7. To add another download, click the **Add New Row** button, and repeat the process.

Links

8. When complete, if uploading files to the server, click the **Upload Files** button.
9. Click the **Save and Continue Edit** button.

Step 4: Complete the Samples Information

1. Click to expand the **Samples** section.
2. Enter a **Title** for the section of samples on the product page.

3. Click the **Add New Row** button. Then, do one of the following:
   - Select the **File** option. Then, click the **Browse** button, and select the sample file to upload.
   - Select the **URL** option. Then, paste the full **URL** of the sample file.

Add New Sample

4. To add a new row, click the **Add New Row** button, and repeat the process.
5. When complete, click the **Save** button.
6. When prompted to refresh the index and cache, click the links in the message at the top of the workspace, and follow the instructions.

   At this point, the product should be visible on the assigned category page of your catalog. Until a product image is uploaded, a placeholder appears in its place.

Step 5: Complete the Remaining Product Information

Although not required, there is other product information to complete. At the very least, you will want to upload product images and complete the meta data.

Things to Remember

- Downloadable products can be uploaded to the server, or linked to from another server on the Internet.
- You can determine the number of times a customer can download a product.
- Customers can be required to log in before going through checkout.
- Downloads can be delivered for orders in a “Pending” or “Invoiced” state.

Downloadable Product Options

The configuration settings determine guest checkout, default values, and delivery options for downloadable products.

To configure downloadable products:

1. On the Admin menu, select **System > Configure**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Downloadable Product Option** section.
4. Configure the options as described in the following field descriptions.
5. When complete, click the **Save Config** button.

Downloadable Product Options

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Order Item Status to Enable Downloads	Website	Determines the status that an order must have before downloads become available. Options include: Pending / Invoiced
Default Maximum Number of Downloads	Website	Determines the default number of downloads available to a customer. Options include: Yes / No
Shareable	Website	Determines if customers must log in to their accounts to access the download link. Options include: Yes — Allows the link to be sent by email, which can then be shared with others. No — Requires customers to log in to their accounts to access the download link.
Default Sample Title	Store View	The default title for all sample files.

FIELD	SCOPE	DESCRIPTION
Default Link Title	Store View	The default link for all downloadable titles.
Opens Links in New Window	Website	Determines if the download link opens in a new browser window. Options include: Yes / No
Use Content Disposition	Store View	Determines how the link to the downloadable content is delivered, as an email attachment, or as an inline link in a browser window. Options include: Attachment — The download link is delivered as an email attachment. Inline — The download link is delivered as an inline link on a web page.
Disable Guest Checkout if Cart Contains Downloadable Items	Website	Determines if guests who are purchasing downloadable products must log in to an account to complete the checkout process. Options Include: Yes — If the cart contains downloadable products, the guest will have to either register for an account, or login to an existing account to complete the purchase. No — The download link is delivered as an inline link in the body of the email message. Guest checkout is available for downloadable products only if Sharable is set to "Yes."

Gift Card

There are three kinds of gift card products: virtual gift cards sent by email, physical gift cards, which can be shipped to the recipient, and a combination of the two. Each gift card has a unique code, which can be redeemed by only one customer during checkout. A code pool must be established before gift cards can be sold.

Physical Gift Card

Virtual

The gift card is sent to the recipient by email. The order requires an email address for the recipient. A shipping address is not necessary.

Physical

The gift card is shipped to recipient's address, which is required during the purchase of the gift card.

Combined

The gift card is shipped and emailed to the recipient. The recipient's email and shipping address is required to purchase the gift card.

Gift Card Workflow

Gift card accounts can be redeemed in the shopping cart, similar to the way a coupon is applied to an order. There is a block with a data entry field for entering the gift card code, with a button that applies it to the items in the cart. In addition, customers can check their gift card status and the remaining balance in their gift card accounts.

Multiple gift card accounts can be applied to a shopping cart. Each time a gift card is applied, the amount appears in the order totals block, and is subtracted from the grand total. The full balance of each gift card is subtracted from the shopping cart total. Multiple gift cards are applied in ascending order. Accounts with the smallest remaining balances are applied first, until the customer runs out of cards, or until the grand total is zero. If the grand total is zero, the last account applied to the cart receives a partial deduction, and any cards that have not applied to the cart will not receive a deduction. The actual deductions occur only once the order is placed.

The price of a gift card can be configured at the time of purchase. Depending on the price configuration, there will be either a drop-down list of price options, a field, or a combination of the two. All amounts are displayed in the currency used in the store, but the actual amount of the gift card is converted to the base currency after it is added to the cart.

The customer enters the Sender Name (and Sender Email for a virtual or combined gift card) and Recipient Name (and the Recipient Email for a virtual or combined gift card). If the customer is logged in, the Sender Name (and Sender Email, if applicable) is entered automatically from information in the customer's account. Depending on how the gift card is configured, there may also be a Message text area.

Purchasing a Gift Card

If multiple gift cards are purchased in one order, and the type is virtual or combined, all the corresponding gift card codes are sent to the recipient in one email.

For all gift card types, the generated account codes will be shown in the order information page in the admin. This allows you to retrieve the code to place it on the physical gift card, if necessary.

If an order with a gift card product is canceled or refunded, you must manually cancel the gift card account. You can either delete the account entirely, or deactivate it.

Creating a Gift Card

The following instructions take you through the process of creating a gift card with the required fields. Each required field is marked with a red asterisk (*). After you complete the required settings and save the product, you can add images and complete the remaining product information, as needed.

Process Overview:

Step 1: Create the Gift Card Product

Step 2: Set Up the Gift Card Pricing

Step 3: Complete the Gift Card Information

Step 1: Create the Gift Card Product

1. On the Admin menu, select **Catalog > Manage Products**. Then, click the **Add Product** button.
2. In the Create Product Settings section, select the **Attribute Set** you want to use as a template for the product.
3. In the Create Product Settings section, do the following:
   a. Accept the “default” **Attribute Set**, or select another.
   b. Set **Product Type** to “Gift Card.”
   c. Click the **Continue** button.
4. You can complete most of the Product Information as you would for a simple product.
5. Click the **Save and Continue** button.

Step 2: Set Up the Gift Card Pricing

1. In the panel on the left, click **Prices**.
2. To add predefined gift card prices, click the **Add Amount** button. Then, enter a price of the gift card as the **Amount**.

Repeat this step to add more pricing options.

3. Set **Allow Open Amount** to one of the following:

No	Requires customers to select a predefined gift card amount.
Yes	Allows customers to enter their own gift card amount. If using an open amount, complete the following to specify the minimum and maximum amounts allowed: Open Amount Min Value Open Amount Max Value

4. Click the **Save** button.

Step 3: Complete the Gift Card Information

1. In the panel on the left, select **Gift Card Information**.
2. Set **Card Type** to one of the following:
   - Virtual
   - Physical
   - Combined
3. Specify whether the value of the gift card **Is Redeemable**. If so, the amount can be transferred to store credit upon creation.
4. Set **Lifetime (days)** to the number of days remaining before the gift card expires. If you do not want to set a limit for the lifetime of the card, leave this field blank.
5. Set **Allow Gift Message** to "Yes," if you want the customer who purchases the Gift Card to be able to include a message for the recipient. A gift message can be included for both virtual (emailed) and physical (shipped) gift cards.
6. Set **Email Template** to the template that you want to use for the notification email that is sent when a gift card account is created.
7. Click the **Save** button.

Things to Remember

- A "code pool" of unique numbers must be generated before a gift card can be offered for sale.
- The three types of gift cards are: Virtual, Physical, and Combined.
- Gift cards can be set to "Redeemable" or "Non-Redeemable."
- The lifetime of a gift card can be unlimited, or set to a number of days.
- The value of a gift card can be set to a fixed amount, or set to an open amount with a minimum and maximum value.
- A gift card account for the customer can be created when the order is placed, or at the time of invoice.

Gift Card Accounts

A gift card account is automatically created for each Gift Card that is purchased. The value of the gift card can then be applied toward the purchase of a product in your store. You can also create gift card accounts from the Admin.

Gift Card Accounts

To create a gift card account:

1. On the Admin menu, select **Customers > Gift Card Accounts**.
2. In the upper-right corner, click the **Add Gift Card Account** button.

3. In the Information section, make sure that **Active** is set to "Yes."

   This field determines if the balance of the account can be redeemed in the shopping cart before checkout. Also, the value in this field determines it the balance from the gift card account can be transferred to a customer's store credit.

Information

4. If applicable, set **Website** to the website where this gift card account can be used.
5. Enter the starting **Balance** of the gift card account.
6. Enter the **Expiration Date** for the gift card. If left blank, the gift card account will not expire.
7. In the Gift Card Account panel on the left, click **Send Gift Card**. Then, do the following:

Send Gift Card

   a. In the **Recipient Email** field, enter the email address to which an email notification of this gift card account will be sent. This field is optional, and no email will be sent if it is left blank.
   b. In the **Recipient Name** field, enter the name of the person who will receive the gift card message.
   c. Set **Send Email from the Following Store View** to the language store view that is associated with the gift card.

8. Do one of the following:
   - If no recipient has been added, click the **Save** button to save the gift card.
   - Click the **Save & Send Email** button to save the changes and send the gift card by email to the recipient.

Gift Card Account Settings

Use the System Configuration Gift Card settings to establish the default settings for all gift cards sold through your store. The code pool is a pre-generated set of unique gift card codes in a specific format. Codes from the code pool are used each time a gift card account is created. It is the responsibility of the administrator to ensure that there are enough codes

available for the gift cards. Make sure to generate a code pool before offering gift cards for sale. By default, Magento generates 1,000 codes. A new pool is not generated if there are still unused codes available.

Gift Card Account General Settings

To establish the gift card code pool:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Gift Cards**.
3. Click to expand the **Gift Card Account General Settings** section.
4. Complete the code format fields according to your preference.
5. When you are ready, click the **Generate** button to create the new code pool.

   When complete, the message, "New code pool was generated" appears.

To configure your store to sell gift cards:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Gift Cards**.
3. Click to expand the **Gift Card Email Settings**. Then do the following:
   a. Set **Gift Card Notification Email Sender** to the email identity that you want to appear as the sender of gift card notifications sent from your store.
   b. Set **Gift Card Notification Email Template** to the template you want to use for the email notifications.
4. Click to expand the **Email Sent from Gift Card Account Management** section. Then, do the following:
   a. Set **Gift Card Email Sender** to the identity that you want to appear as the sender of gift cards from your store.
   b. Set **Gift Card Template** to the template you want to use for the gift card.

5. Click to expand the **Gift Card General Settings** section. Then, set the following fields to the default values that you want to use for gift card purchases:

- Redeemable (Yes / No)
- Lifetime (days)
- Allow Gift Message (Yes / No)
- Gift Message Maximum Length
- Generate Gift Card Account when Order Item is (Ordered / Invoiced)

> Depending on your location, there may be laws in place that forbid gift cards from having expiration dates. Check your local laws before setting a lifetime for your gift cards.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Code Length	Global	Determines the length of the gift card code.
Code Format	Global	Determines the format of the gift card code. Options include: Alphanumeric / Numeric
Code Prefix	Global	Defines any prefix added to the beginning of the code.
Code Suffix	Global	Defines any suffix added to the end of the code.
Dash Every X Characters	Global	If you want to include dashes in the code, determines the number of characters between each dash.
New Pool Size	Global	Determines the size of the new code pool to be generated.
Low Code Pool Threshold	Global	Determines the number of records in the code pool that triggers an alert that the pool needs to be replenished.

Chapter 13:

Product Information

The Product Information panel provides access to the full range of settings which make up a product record. The information in this section can be used for reference when creating a product of any type.

The selection of Product Information tabs, and the organization of the fields on each page is determined by the attribute set that was used to create the product. As a result, some fields in your product might differ from what is shown in the examples.

Product Information

General

Use the General tab to enter information about the product. In addition to providing basic information about the product, this section determines the product's visibility in the catalog and search.

General

Button Descriptions

BUTTON	DESCRIPTION
Create New Attribute	Gives you the ability to create a new attribute while working in product edit mode. Although you can save the new attribute, it is not automatically included in the attribute set that is associated with the current product.
WYSIWYG Editor	Opens the editor so you can format the description fields with HTML. The frontend properties of the description attributes must set to allow HTML.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Name	Store View	(Required) The name of the product you want to appear in catalog. The name is also used to auto-generate the URL Key.
Description	Store View	(Required) The main product description that appears on the product page. The text should be plain ASCII text. HTML tags can be used to format the description if permitted by the attribute properties. Do not paste text directly from a word processor, because the text might include print control codes that will not render correctly. To strip out any control codes, save the file as a .txt file before copying and pasting te text into the product description.
Short Description	Store View	(Required) Depending on the theme, the Short Description might appear on catalog pages. Because of its length, it is often used for RSS feeds.
SKU	Global	(Required) The Stock Keeping Unit is a unique identifier for each individual product or service provided.
Weight	Global	(Required) The weight of the product is a decimal value used for shipping calculations, and refers to the standard measurement system used by shipping carriers in your locale. In the United States, weight is measured in pounds and ounces, whereas countries on the metric system measure weight in grams and kilograms.
Set Product as New from Date	Website	Sets the beginning date for the range of time the product is featured in the “New Product” block on the Home page. The date can be typed directly into the box, or selected from the calendar.
Set Product as New to Date	Website	Sets the ending date for the range of time the product is featured in the “New Product” block on the Home page.

FIELD	SCOPE	DESCRIPTION
Status	Website	(Required) The Status indicates when the product is ready to be offered for sale in your store. Options include: Enabled / Disabled.
URL Key	Store View	The URL Key determines the online address of the product. It is added to the base URL of the store, and appears in the address bar of a browser. The URL Key should be all lowercase characters, with hyphens instead of spaces. Magento initially creates a default, "search engine friendly" URL, based on the product name. Do not type the suffix .html in the URL Key, because use of the suffix is controlled by your store configuration. To learn more, see , SEO URL Options.
Visibility	Store View	(Required) Determines the level of visibility the product has throughout the store. Options include: Not Visible Individually — The product may be associated with a one-to-many product, but is not listed in the catalog. Catalog — The product appears in the catalog listing, but is not included in Search results. Search — The product appears in search results, but is not listed in the catalog. Catalog, Search — The product is listed in the catalog and search results.
Country of Manufacture	Website	Select the manufacturer of the product. To add new options to the list, see Manage Label / Options.
Enable RMA	Website	Determines if Return Merchandise Authorization is available for the product. Options include: Yes / No / Use Config

Product Meta Data

Your product meta data is the first level of contact with potential customers who are searching for a product. The title and description are selling tools that will either help to motivate a visitor to click your link or not. It is wise to use a descriptive title and a description that includes relevant words that a potential customer might search.

The information is read by search engines that index your site. Although Google no longer places a value on meta keywords, other search engines continue to use the information. It's a good practice to incorporate high-value keywords in your product titles and related content.

Meta Information

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Meta Title	Store View	The title appears in the title bar and tab of your browser, and is also used as the title on a search engine results page (**SERP**[1]).
Meta Keywords	Store View	Enter relevant keywords for the product. Consider using keywords that customers may use to find the product.
Meta Description	Store View	Write a few sentences to describe the product. Though not visible to the customer, some search engines include the meta description on the search results page.

[1] Search Engine Results Page

Recurring Profile

Recurring Profiles are most often used for subscriptions or products with installment payment plans. When such a product is purchased from your store, the customer is redirected to a third-party payment system. The customer enters into a recurring payment agreement to authorize the payment system to charge the customer account according to the recurring profile settings.

When a customer purchases a product with recurring payments, the profile parameters specified from Magento are transferred to the payment system. Magento supports recurring profiles for items paid with PayPal Express Checkout.

For example, to set up a product with monthly subscription payments, the following parameters are specified in the recurring profile of the product. The customer is charged by the payment system once a month, for a year.

Billing Period Unit:	Month
Billing Frequency:	1
Maximum Billing Cycles:	12

You can also set up a trial period where the customer pays a special, introductory price for a period of time. When the trial ends, the customer is charged the regular amount.

> Creating a recurring profile for a product does not create additional sales orders.

In the third-party payment system, a recurring profile is an accounting record that captures payments on a regular basis and according to the payment schedule defined in the recurring profile. A recurring profile submits the information about the frequency of a payment being initiated to the payment system.

The Recurring Profile tab appears by default for simple and virtual products. However you can configure it to become available for other product types by changing the Apply To property of the recurring_profile attribute. To learn more about recurring profiles, see: Working with Recurring Profiles in the knowledge base.

To set up a recurring profile:

1. On the Admin menu, select **Catalog > Manage Products**. Find the product in the list, and click to open it in edit mode.
2. In the panel on the left, select **Recurring Profile**.
3. Set **Enable Recurring Profile** to “Yes.” The section expands to include additional options.

Recurring Profile

4. In the Schedule section, do the following:

Schedule

   a. To let the customer determine the starting date for the payments, set **Customer Can Define Start Date** to "Yes."

   b. In the **Schedule Description** field, enter a brief description of the recurring payment. The description is used as the name of the recurring payment on the Review Information page.

   c. In the **Maximum Payment Failures** filed, enter the number of times payment can fail before the recurring profile is suspended.

   d. To automatically initiate a payment transactoin at the end of the next billing cycle, set **Auto Bill on Next Cycle** to "Yes."

5. In the Billing section, do the following:

Billing

   a. Set **Billing Period Unit** to the period of time that defines the billing cycle.

   b. Set **Billing Frequency** to how often a payment transaction is initiated during the billing cycle.

   c. In the **Maximum Billing Cycles** field, enter the maximum number of payments allowed for the recurring profile. If left blank, the the customer will continue to be charged until the recurring profile is canceled.

6. In the Trial Period section, do the following:

Trial Period

a. Set **Trial Billing Period Unit** to the period of time that defines the billing cycle during the trial period.

b. Set **Trial Billing Period Frequency** to how often a payment transaction is initiated during the trial billing cycle.

c. In the **Trial Billing Period Cycles** field, enter the maximum number of payments allowed during the trial period.

d. In the **Trial Billing Amount** field, enter the product price during the trial period.

> The trial billing period parameters are optional, but if specified, make sure that all fields are complete. Otherwise, the payment system will not authorize the payment.

7. In the Initial Fees section, do the following:

Initial Fees

a. In the **Initial Fees** field, enter the amount that the customer is charged at the time of purchase. The initial fee is paid only once during the life of a subscription.

b. If you want to cancel the recurring if the initial payment fails, set **Allow Initial Fee Failure** to "Yes." If set to "No," the initial fee is added to the customer's outstanding amount and is charged by the payment system as soon as the customer account has a sufficient amount.

8. When complete, click the **Save** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Schedule		
Customer Can Define Start Date	Global	Determines if the customer can set the starting date for the payments. Options include: Yes — Displays the Recurring Profile Start Date as an option on the product page. No — The customer cannot set the start date.
Schedule Description	Global	A brief description of the recurring payment. The description appears as the name of the recurring payment on the review information page of the payment system. If left empty, the name of the selected product appears as the name of the recurring profile.
Maximum Payment Failures	Global	Determines the number of failed scheduled payments before the recurring profile is automatically be suspended.
Auto Bill on Next Cycle	Global	Determines if the payment system automatically initiates a payment transaction after the regular billing cycle. In the event of a number of payment failures and the customer has an outstanding amount, the customer is charged in the next billing cycle. Options: Yes / No
Billing		
Billing Period Unit	Global	Determines the period of time included in a subscription billing cycle, and how frequently a payment transaction is initiated. Options include: Day Week Two Weeks Month Year

FIELD	SCOPE	DESCRIPTION
Billing Frequency	Global	Determines how often within the billing period a payment transaction is initiated for the recurring profile.
Maximum Billing Cycles	Global	Limits the number of payments that can be made during a billing cycle. If you do not specify the maximum of billing cycles, the recurring profile remains permanently active and the customer is charged by the payment system until the recurring profile is suspended or canceled.
Trial Period		
Trial Billing Period Unit	Global	Determines the period of time included in a trial subscription billing cycle, and how frequently a payment transaction is initiated. Options include: Day Week Two Weeks Month Year
Trial Billing Frequency	Global	Determines how often during the billing period a payment transaction is initiated for the recurring profile.
Maximum Trial Billing Cycles	Global	Limits the number of recurring payments that can be made during a trial billing cycle.
Trial Billing Amount	Global	The price of the product during the trial period.

FIELD	SCOPE	DESCRIPTION
Initial Fees		
Initial Fee	Global	The amount the customer is charged at the time of purchase. The initial fee is paid only once during the life of a subscription.
Allow Initial Fee Failure	Global	Determines if the payment profile is suspended if the initial fee payment fails. In case the field is set to No, Options include: Yes — The payment profile is suspended if the initial fee fails. No — The initial fee is added to the customer's outstanding amount and is charged by the payment system as soon as the customer account has the sufficient amount.

Design

The Design page gives you the ability to apply a different theme to the product page, and make updates to the XML code that controls the page layout.

Design

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Custom Theme	Store View	To apply a custom theme, select the one you want from the list of available themes.
Active From	Store View	If applying a custom theme for a period of time, enter the beginning date, or select the date from the Calendar.
Active To	Store View	If applying a custom theme for a period of time, enter the ending date, or select the date from the Calendar.
Custom Layout Update	Store View	You can further customize the theme with XML coding.
Page Layout	Store View	To apply a different layout to the product page, select one of the following: No layout updates — (Default) Does not apply any layout changes. Empty — For custom layouts, such as a 4-column page. Requires an understanding of XML.

FIELD	SCOPE	DESCRIPTION	
		1 column	Applies the 1-column layout.
		2 columns with left bar	Applies the 2 column layout.
		2 columns with right bar	Applies the 2-columns with right bar layout.
		3 columns	Applies the 3 column layout.
Display product options in	Store View	Determines the place on the page where the product options appear. Options include: Product Info Column / Block after Info Column	

Gift Options

Gift Options determine if customers have the option to add a gift message and to gift wrap the product during checkout. To configure gift options for the store, see: Gift Options Configuration.

To set up gift options for a product:

1. On the Admin menu, select **Catalog > Manage Products**. Then, click to open the product in edit mode.
2. In the panel on the left, select **Gift Options**. Then, do the following:

Gift Options

   a. To allow the customer to enter a gift message, set **Allow Gift Message** to "Yes."
   b. To offer gift wrapping for this product, set **Allow Gift Wrapping** to "Yes."
   c. To charge for gift wrapping, enter the amount in the **Price for Gift Wrapping** field, as a decimal, without the currency symbol.
3. When complete, click the **Save** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Allow Gift Message	Global	Determines if a gift message is available for the product. Options include: Yes / No
Allow Gift Wrapping	Store View	Determines if gift wrapping is available for the product. Options include: Yes / No
Price for Gift Wrapping	Global	Determines if there is an additional charge to gift wrap the product. Enter the price without a currency symbol.

Websites

If your Magento installation has multiple websites, stores, or views, you can set the scope of a configuration setting, product, category, or attribute to apply to a specific website, store, or store view. To learn more, see: Websites, Stores & Views.

Websites

To assign a product to a store view:

1. In the Product Information panel on the left, select **Websites**.
2. Select the checkbox for each store view where the product is offered for sale.
3. When complete, click the **Save** button.

Product Categories

Every product in your catalog must be assigned to at least one category. Before you can add products to your catalog, you must first establish its basic category structure. A product cannot be saved until after it has been assigned to at least one category.

Product Categories

To set up the product categories:

1. In the Product Information panel on the left, select **Categories**.
2. In the category tree, select the checkbox of each category to which you want to associate the product. Click the plus **[+]** icon to show any available subcategories.

   A single product can be assigned to more than one category.

3. When complete, click the **Save** button.

Related Products

Related products are meant to be purchased in addition to the item the customer is viewing. Simply click the checkbox of a product to place it in the shopping cart. The placement of the Related Products block varies according to theme and page layout. In the example below, it appears at the bottom of the Product View page. With a 2 column layout, the Related Product block often appears in the right column.

Related Products

To set up related products:

1. In the Product Information panel on the left, click **Related Products**.
2. Click the **Reset Filter** button in the upper-right to list all the available products, or use the search filters at the top of each column to find specific products.
3. In the list, select the checkbox in the first column of any product you want to feature as a related product.

Select Related Products

4. When complete, click the **Save** button.

Up-sells

Up-sell products are items that your customer might prefer instead of the product currently viewed. An item offered as an up-sell might be of a higher quality, more popular, or have better profit margin. Up-sell products appear on the product page, under a heading such as, “You may also like.”

Up-Sells on Product Page

To select up-sell products:

1. In the Product Information panel, select **Up-sells**.
2. Click the **Reset Filter** button in the upper-right to list all the available products, or use the search filters at the top of each column to find specific products.
3. In the list, select the checkbox in the first column of any product you want to feature as an up-sell.
4. When complete, click the **Save** button.

Cross-sells

Cross-sell products are similar to impulse purchases positioned next to the cash register in the checkout line of a grocery store. Products offered as a cross-sell appear on the shopping cart page, just before the customer begins the checkout process.

Cross-sells Offered During Checkout

To set up cross-sell products:

1. In the Product Information panel on the left, click **Cross-sells**.
2. Click the **Reset Filter** button in the upper-right to list all the available products, or use the search filters at the top of each column to find specific products.
3. In the list, select the checkbox in the first column of any product you want to feature as a cross-sell.

Cross-Sell Product

4. When complete, click the **Save** button.

Custom Options

Custom options are an easy way to offer a selection of product variations that do not rely on attributes. The limitations are that you cannot track inventory based on any variation, and that a product with custom options cannot be used with a configurable, grouped, or bundle product. Custom options are a good solution if your inventory needs are simple.

Custom Options on Product Page

To create custom options:

1. On the Admin menu, select **Catalog > Manage Products**.
2. In the list, open the product record in edit mode.
3. In the panel on the left, select **Custom Options**.
4. In the upper-right corner, click the **Add New Option** button. Then, do the following:

Custom Options

a. In the **Title** field, enter a name for the property.

b. Set the **Input Type** you want to use for data entry.

c. Set **Is Required** to "Yes" if the option must be selected before the product can be purchased.

d. In the **Sort Order** field, enter a number to indicate the order of this item in the list of options. Enter the number 1 to display this option first.

5. Click the **Add New Row** button. Then, complete the following:

Add New Row

a. In the **Title** field, enter a name for this option.

b. In the **Price** field, enter any markup or markdown from the base product price that applies to this option.

c. Set **Price Type** to one of the following:

Fixed	The price of the variation differs from the price of the base product by a fixed monetary amount, such as $1.
Percentage	The price of the variation differs from the price of the base product by a percentage, such as 10%.

d. Enter a **SKU** to identify the option. The option SKU is added as a suffix to the SKU of the product record.

e. In the **Sort Order** field, enter a number to indicate the order of this item in the list of options. Enter the number 1 to display this option first.

6. When complete, click the **Save** button.

Chapter 14:

Inventory

Managing stock creates opportunities for customer engagement by displaying stock availability messages in your store, and giving your customers the opportunity to receive product alerts. Even if your store doesn't have a large inventory of products, your customers can benefit from the way you manage your inventory.

Inventory settings can be made for the catalog as a whole, and fine tuned for each individual product. In addition to controlling stock levels, the inventory settings determine how backorders and returned items are managed.

If your needs are simple, you might choose not to manage inventory at all. However, inventory management is more than just keeping track of how many products you have on hand.

Topics in this chapter:

- Inventory Setup
- Managing Stock
- Stock Availability Messages
- Out of Stock Threshold
- Product Alerts

Inventory Setup

The Product Stock Items configuration determines the default product inventory settings. The configuration applies to individual products, rather than to the contents of the cart as a whole.

To configure the default inventory settings:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Inventory**.
3. Click to expand the **Product Stock Options** section.
4. Enter the default settings for each item, as described in the following field descriptions.
5. When complete, click the **Save Config** button.

Product Stock Options

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Manage Stock	Global	Determines if you use full inventory control to manage the items in your catalog. Options include: Yes — Activates full inventory control to keep track of the number of items currently in stock. No — Does not keep track of the number of items currently in stock.
Backorders	Global	Determines how your store manages backorders. A backorder does not change the

FIELD	SCOPE	DESCRIPTION
		No Backorders: Does not accept backorders when product is out of stock Allow Qty Below 0: Accepts backorders when the quantity falls below zero. Allow Qty Below 0 and Notify Customer: Accepts backorders when the quantity falls below zero, but notifies customers that orders can still be placed.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of a product that can be purchased in a single order by customer group. By default, the maximum quantity is set to 10,000.
Qty for Item's Status to Become Out of Stock	Global	Determines the stock level at which a product is considered to be out of stock.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum amount of an item that is available for purchase according to customer group. By default, the minimum quantity is set to 1. Click the Add Minimum Qty button to enter a different value for a specific customer group.
Notify for Quantity Below	Global	Determines the stock level at which notification is sent that the inventory has fallen below the threshold.
Enable Qty Increments	Global	Determines if items can be sold in quantity increments. Options include: Yes / No
Qty Increments	Global	Establishes the number of products that make up a quantity increment.
Automatically Return Credit Memo Item to Stock	Global	Determines if items included on credit memos are automatically returned to inventory. Options include: Yes / No

Managing Stock

Magento has both a short and long version of the Inventory options, depending on whether you need to manage inventory for the product. To take full advantage of Magento's advanced inventory management capabilities, Manage Stock must be enabled. The long form appears only when Manage Stock is set to "Yes." The initial values reflect the default Product Stock Option configuration.

Inventory (Short Form)

To complete the required inventory settings:

1. In the Product Information panel, select **Inventory**. Then, do the following:
   a. Clear the checkbox below the **Manage Stock** field. Then, set **Manage Stock** to "Yes."
   b. In the **Qty** field, type the number of units you currently have in stock.
   c. Set **Stock Availability** to "In Stock."
2. When complete, click the **Save** button.

Inventory (Long Form)

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Manage Stock	Global	Determines if you use full inventory control to manage the items in your catalog. Options include: Yes — Activates full inventory control to keep track of the number of items currently in stock. (To change the setting, clear the Use Config Settings checkbox and select "Yes.") No — Does not keep track of the number of items currently in stock. (This is the default setting.)
Qty	Global	(Required) The quantity of the item in stock.
Qty For Item's Status to become Out of Stock	Global	Specifies that below a level of your choosing, the product will become out of stock.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum amount of this item that is available for purchase. By default, the minimum quantity is set to 1.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of this item that can be purchased in a single order. By default, the maximum quantity is set to 1000.
Qty Uses Decimals	Global	Determines if customers can use a decimal value rather than a whole number when entering the quantity ordered. Options include: Yes — Permits values to be entered as decimals, rather than whole numbers, which is suitable for products sold by weight, volume or length. No — Quantity values must be entered as whole numbers.
Can be divided into Multiple Boxes for	Global	Determines if parts of the product can shipped separately.

FIELD	SCOPE	DESCRIPTION
Shipping		Options include: Yes / No
Backorders	Global	Determines how your store manages backorders. A backorder does not change the processing status of the order. Funds are still authorized or captured immediately when the order is placed, regardless of whether the product is in stock. When the product becomes available, it will be shipped. Options include: No Backorders — Does not accept backorders when product is out of stock Allow Qty Below 0 — Accepts backorders when the quantity falls below zero. Allow Qty Below 0 and Notify Customer — Accepts backorders when the quantity falls below zero, but notifies customers that orders can still be placed.
Notify for Quantity Below	Global	Sends a notification to you when the quantity in stock falls below this number.
Enable Qty Increments	Global	Allows the product to be sold in quantity increments.
Qty Increments	Global	Sets the number used as the basis of quantity increments.
Stock Availability	Global	Determines the current availability of the product. Options include: In Stock — Makes the product available for purchase. Out of Stock — Unless Backorders are activated, prevents the product from being available for purchase and removes the listing from the catalog.

Stock Availability

You can define an inventory level that becomes the threshold to determine when an item needs to be reordered. The out of stock threshold can be set to any number greater than zero.

Another way you can use the stock availability threshold is to manage products that are in high demand. If you want to capture new customers, rather than sell to high-quantity buyers, you can set a maximum quantity to prevent a single buyer from taking out your entire inventory.

Your catalog can be configured to display the availability of each item as "In Stock" or "Out of Stock" on the product page. The configuration setting applies to the catalog as a whole, and the message changes according to the stock status of the product. There are several display variations possible, including how "out of stock" products are managed in the catalog and search results lists.

"In Stock" Message on Product Page

Process Overview:

Step 1: Configure Inventory Stock Options

Step 2: Set Product to Manage Stock

Step 3: Set "Out of Stock" Threshold

Step 1: Configure Inventory Stock Options

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Inventory**.
3. Click to expand the **Stock Options** section. Then, do the following:

Stock Options

   a. To configure how "out of stock" products are handled in the category and search results lists, set **Display Out of Stock Products** to one of the following:

      Yes — Includes "out of stock" products on catalog pages.

      No — Omits "out of stock" products from catalog pages.

   b. To configure the stock availability message on the product page, set **Display products availability in stock in the frontend** to one of the following:

      Yes — Displays an availability message indicating the product stock status.

      No — Does not display an availability message.

4. Click the **Save Config** button to save the setting.

Step 2: Set Product to Manage Stock

1. On the Admin menu, select **Catalog > Manage Products**.
2. In the list, click to open the product. Then in the Product Information panel on the left, select **Inventory**.
3. If necessary, clear the **Use Config Settings** checkbox, and set **Manage Stock** to "Yes." Then, complete the inventory settings as needed.
4. Make sure that **Stock Availability** is set to "In Stock."
5. Click the **Save** button to save the product settings.

Step 3: Set "Out of Stock" Threshold

1. On the Inventory tab, set the **Qty for Item's Status to Become Out of Stock** to a value above zero.
2. To set the quantity of the product that is allowed in the cart, set the following fields to the appropriate values for your product, store, and strategy:
   - Minimum Quantity Allowed in Shopping Cart
   - Maximum Quantity Allowed in Shopping Cart
3. To be notified when stock drops below the threshold, clear the **Use Config Settings** checkbox. Then, set **Notify for Quantity Below** to a number to establish the threshold. The default the value is 1.

   If you need time to restock your inventory, you can use this value to indicate when it is time to replenish.

Message Scenarios

You can use a combination of configuration settings to control stock availability messages on product pages and in listings of products on catalog pages.

"In Stock" Message

Product Page

There are several variations of messaging available for the product page, depending on the combination of Manage Stock and Stock Availability settings.

"Out of Stock" Message

Example 1: Show Availability Message

Scenario 1: This combination of settings causes the availability message to appear on the product page, according to the stock availability of each product.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
Product Inventory		
Manage Stock	Yes	
Stock Availability	In Stock Out of Stock	"Availability: In Stock" "Availability: Out of Stock"

Scenario 2: When stock is not managed for a product, this combination of settings can be used to display the availability message on the product page.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
Product Inventory		
Manage Stock	No	"Availability: In Stock"

Example 2: Hide Availability Message

Scenario 1: This combination of configuration and product settings prevents the availability message from appearing on the product page.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	No	
Product Inventory		
Manage Stock	Yes	
Stock Availability	In Stock Out of Stock	None None

Scenario 2: When stock is not managed for a product, this combination of configuration and product settings prevents the availability message from appearing on the product page.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	No	
Product Inventory		
Manage Stock	No	None

Catalog Page

The following display options are possible for the category and search results lists, depending on the product availability and configuration settings.

"Out of Stock" Message on Category Page

Example 1: Show Product with "Out of Stock Message"

This combination of configuration settings includes out of stock products in the category and search results lists, and displays an "out of stock" message.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	Yes	
Display product availability in stock in the frontend	Yes	"Out of stock"
Display Out of Stock Products	Yes	
Display product availability in stock in the frontend	No	None

Example 2: Show Product without "Out of Stock Message"

This combination of configuration settings includes out of stock products in the category and search results lists, but does not display a message.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	Yes	None
Display product availability in stock in the frontend	No	

Example 3: Hide Product Until Back in Stock

This configuration setting omits out of stock products entirely from the category and search results lists, until they are back in stock.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	No	None

Out of Stock Threshold

You can define an inventory level that becomes the threshold to determine when an item needs to be reordered. The out of stock threshold is set to a number above zero.

To set the out of stock threshold:

1. In the Product Information panel, select **Inventory**.
2. Set the **Qty for Item's Status to Become Out of Stock** to a value above zero.

To change the quantity allowed in cart:

This option is helpful for products in high demand. If you want to capture a larger number of new customers rather than selling high volumes to high-quantity buyers, you can set a maximum quantity to prevent a high-quantity buyer from taking out your entire inventory.

1. In the Product Information panel, select **Inventory**.
2. Change the **Minimum** and **Maximum Quantity Allowed in Shopping Cart** fields to appropriate values for your product, store, and strategy.

To be notified when stock drops below threshold:

1. In the Product Information panel, select **Inventory**.
2. Clear the **Use Config Settings** checkbox, and set **Notify for Quantity Below** to indicate the level when you want to be notified. By default, the value is set to 1.

Product Alerts

You can enable your customers to subscribe to two types of customer alerts by email: price change alerts and in-stock alerts. For each alert type, choose whether to enable users to subscribe to it, and select the email template to use. Also, select a sender display name, which applies to both alert types.

Product Alerts

The price change alert creates a Sign up for price alert link on every product page. Customers can click the link to subscribe to alerts related to the product. Whenever the price changes, or the product goes on special, the customer receives an email alert.

The in-stock alert creates a link called “Sign up to get notified when this product is back in stock” for every product that is out of stock. Customers can click the link to subscribe to the alert. When the product is back in stock, customers receive email notification that the product is available. Products with alerts have a Product Alerts tab in the Product Information panel that lists the customers who have subscribed to an alert.

Setting Up Product Alerts

These settings enable you to select how often Magento checks for changes that require alerts to be sent. Additionally, you can select the recipient, sender, and template for emails that are sent if the sending of alerts fails.

To set up product alerts:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Product Alerts Run Settings** section. Then, do the following:
   a. To determine how often product alerts are sent, set **Frequency** to one of the following:
      - Day
      - Week
      - Month
   b. To determine the time of day product alerts are sent, set **Start Time** to the hour, minute, and second.

c. In the **Error Email Recipient** field, enter the email of the person to be contacted if an error occurs.

d. In the **Error Email Sender** field, select the store identity that appears as the sender of the error notification.

e. Set **Error Email Template** to the transactional email template to be used for the error notification.

4. When complete, click the **Save Config** button.

Product Alert Run Settings

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Frequency	Global	Choose how often product alerts are sent out: Daily, Weekly, or Monthly.
Start Time	Global	Choose what time of day the product alert process starts. This time should be after any price or inventory updates are performed.
Error Email Recipient	Global	Identify the email address of the person (normally a store administrator) who should receive an email notification when there is an error in the product alert process.
Error Email Sender	Global	Select the role that the email will be “from.”
Error Email Template	Global	Select the email template to use for product alert error notifications.

Managing Stock for Configurable Products

By default, Manage Stock is turned off for a configurable product, because the inventory is managed through each associated product. However, at times it may be necessary to apply inventory settings to a configurable product as a whole, such as to set quantity increments and change the stock availability.

To enable quantity increments:

1. On the Inventory tab of the configurable product, clear the **Use Config Settings** checkbox, and set **Manage Stock** to "Yes." The Enable Qty Increments field appears.
2. To sell the product in quantity increments, do the following:
   a. Below the Enable Qty Increments field, clear the **Use Config Settings** checkbox. Then, set **Enable Qty Increments** to "Yes."
   b. In the **Qty Increments** field, enter the number of products that you want to sell together as a single batch.

To set product as "Out of Stock:"

1. On the Inventory tab of the configurable product, clear the **Use Config Settings** checkbox, and set **Manage Stock** to "Yes." The Stock Availability field appears.
2. To temporarily remove the product from sale, set **Stock Availability** to "Out of Stock."
3. When you are ready to offer the product for sale, set **Stock Availability** to "In Stock."

Chapter 15:

Product Pricing

Magento Enterprise Edition supports a number of pricing options that you can use for promotions, and to meet minimum advertised price requirements.

Topics in this chapter include:

- Prices
- Special Price
- Tier Price
- Package Price
- Minimum Advertised Price
- Product Group Price

Prices

The Prices tab is used to establish the pricing structure that is associated with a product. Options include special and tier pricing, and manufacturer's suggested retail price.

Prices

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Price	Global	The retail price of the product.
Group Price	Global	Sets up promotional prices for specific customer groups within the selected website.
Special Price	Website	To offer a Special Price, enter a discounted price and complete the date range fields to establish when the promotion goes into effect. When available, the retail price is crossed out and the special price appears below in a large, bold font.
Special Price From Date	Website	Sets the beginning date for the range of time the Special Price is offered.
Special Price To Date	Website	Sets the ending date for the range of time the Special Price is offered.
Tier Price	Website	Tier pricing is used to offer a quantity discount. The discount can be applied to specific customer groups within the selected website.
Apply MAP	Website	When applied, hides the actual product price from the customer. Options include:

FIELD	SCOPE	DESCRIPTION	
Display Actual Price	Website	Determines when the customer can see the actual product price. Options include:	
		In Cart	Displays the actual product price in the shopping cart.
		Before Order Confirmation	Displays the actual product price only at the end of the checkout process, just before the order is confirmed.
		On Gesture	Displays the actual product price
		Use Config	Displays the actual price according to the configuration setting.
Manufacturer's Suggested Retail Price	Global	The retail price as suggested by the manufacturer (MSRP).	
Tax Class	Website	(Required) Determines the tax class associated with the product. Options include:	
		None	The item is not subject to tax.
		Default	The item is subject to the tax rules associated with the "default" tax class.
		Taxable Goods	The item is subject to the tax rules associated with the "Taxable Goods" tax class.
		The manner in which product taxes are calculated is determined by the configuration of your store.	

Special Price

To offer a Special Price, enter a discounted price and complete the date range fields to establish when the promotion goes into effect. On both the catalog list and product pages, the regular price is crossed out, and the Special Price appears in bold red.

Special Pricing

To display a special price:

1. In the Product Information panel on the left, select **Prices**.
2. Enter the amount of the **Special Price**.
3. Complete the **Special Price From Date** and **Special Price To Date** to define the period of time that the special price is in effect. You can pick the dates from the **Calendar** to the right of each field.
4. Click the **Save** button to save your changes.
5. When prompted to update the cache and indexes, follow the instructions at the top of the page.

Tier Price

Tier pricing lets you offer a quantity discount from oth the catalog list and product detail pages. The discount can be applied to a specific store view or customer group.

Tier Price "As Low as"

- On the catalog page, the product price includes the words, "As Low As: $110.49"
- On the product page, the calculated quantity discount has the message:

> Buy 2 for $__._ each and save _%
> Buy 4 for $__._. each and save _%

The prices in the storefront take precedence from the highest to the lowest quantity. Therefore, if you have a tier for the quantity 5 and one for the quantity 10 and a customer adds 5, 6, 7, 8 or 9 items to the shopping cart, then the customer gets the discounted price that you specified for the quantity 5 tier. As soon as the customer adds the 10th item, the discounted price specified for the quantity 10 tier supersedes the quantity 5 tier and that discounted price (of 10) applies instead.

To display a tier price:

1. In the Product Information panel on the left, select **Prices**.
2. In the Tier Price section, click the **Add Tier** button. Then, do the following:

Tier Price

a. Select the **Website** to which the tier pricing applies.

b. Select the **Customer Group** for whom the tier pricing is available.

   To apply a tier to multiple groups, but not all groups, create multiple tiers, each with the same Qty and Price information and select a different customer group for each.

c. In the **Qty** field, enter the quantity that must be ordered to receive the discount.

d. In the **Price** field, enter the adjusted price of the item.

3. When complete, click the **Save** button.

4. When you are prompted to update the cache and indexes, follow the instructions in the message at the top of the workspace.

Package Price

Unlike a unit price, a package price refers to multiple items of the same product that are packaged together and sold as a single unit. A six-pack of soft drinks is an example of package pricing.

To sell multiple products as a package:

1. On the Admin menu, select **Catalog > Manage Products**.
2. In the list, click to select the product you want to sell as a package.
3. In the panel on the left, select **Inventory**. Then, do the following:
   a. Set **Qty for Item's Status to Become Out of Stock** to the lowest inventory threshold for this item. (If necessary, clear the **Use Config Settings** checkbox.)

      The number should be a multiple of the number of items in the package. For example, for a six-pack, the threshold might be 6, 12, 18, and so on.

   b. Set **Enable Qty Increments** to "Yes."
   c. Set **Qty Increments** to the number of units included in the package. For example, 6.
4. When complete, click the **Save Config** button.

Minimum Advertised Price

Merchants are sometimes prohibited from displaying a price that is lower than the manufacturer's suggested retail price (MSRP). Magento's Minimum Advertised Price (MAP) gives you the ability to remain in compliance with the manufacturer's requirements while offering your customers a better price. Because requirements differ from one manufacturer to another, you can configure your store to prevent the display of your actual price on pages where it is not allowed to appear according to the terms of the manufacturer.

"Click for Price" Gesture with Popup

MAP Logic

For products that allow configuration from the storefront, with prices that depend on a selected option, (such as custom options, or simple products with their own SKUs and stock management), the following logic is implemented:

- MAP applies to the main price; prices of the options, bundle items, and associated products (which add or subtract from the main price) are displayed normally.
- If a product does not have a main price, and its price is derived from the prices of associated products (such as with a grouped product), the MAP settings of the associated products are used.

The MAP application logic for other price settings is as follows:

- If tier pricing is set, the tier price appears according to the Display Actual Price setting.
- If a special price is set, it is considered to be the actual price for MAP.

In the order management and customer management tools, as well as in the reports sections of the Admin, only the actual price appears.

> If a product added to the shopping cart has MSRP specified, the price will not be crossed-out in the mini shopping cart or in the shopping cart.

Using MAP with Product Types

PRODUCT TYPE	DESCRIPTION
Simple, Virtual	The actual price is not shown on the catalog and product pages; it is displayed according to the Display Actual Price setting. The custom options prices are displayed normally.
Grouped	Prices of the associated simple products are not shown on the catalog and product pages; they are displayed according to their Display Actual Price setting.
Configurable	The actual price is not shown on the catalog and product pages; it is displayed according to the Display Actual Price setting. The prices of the options are displayed normally.
Bundle with fixed price	The actual price is not shown in the catalog; it is displayed according to the Display Actual Price setting. The prices of the bundle items are displayed normally. MAP is not available for bundled products with dynamic pricing.
Downloadable	The actual price is not shown on the catalog and product pages; it is displayed according to the Display Actual Price setting. The prices of the links are displayed normally.

Using MAP with Price Settings

PRICE SETTING	DESCRIPTION
Tier Price	If tier pricing is set, the tier pricing message is not displayed in the catalog. On the product page a notification is displayed that indicates that the price can be lower when ordering more than a certain quantity, but the discount is displayed in percentages only. For associated products of a grouped product, the discounts are not displayed on the product page. The tier price is shown according to the Display Actual Price setting.
Special Price	If the Special price is specified, the special price is displayed according to the Display Actual Price setting.

MAP Setup

MAP can be configured at both the global and product levels. There are a variety of configuration options that you can use to remain in compliance with the terms of your agreement with the manufacturer, while still offering your customers a better price. Your store's MAP settings can be applied to all products in your catalog or configured for only specific products.

On the global level, you can enable/disable the functionality, apply it to all products, define how the actual price is displayed, and edit the text of the MAP related messages and information tips that appear in the store. When MAP is enabled globally, product-level MAP settings become available. For a product you can choose to apply MAP, specify the MSRP, and define how the actual price is displayed. Product-level MAP settings override the global MAP settings.

Minimum Advertised Price Configuration

To configure MAP globally:

1. On the Admin menu, select **System > Configuration**.
2. In the upper-right corner, set **Current Configuration Scope** to the website where the configuration applies.
3. In the panel on the left, under Sales, select **Sales**. Then, click to expand the **Minimum Advertised Price** section, and do the following:
4. To activate MAP, set **Enable MAP** to "Yes."
   a. Set **Apply MAP (Default Value)** to one of the following:

- To apply MAP to certain products, select “No.”
- To apply MAP by default to all products and hide all prices throughout the site, select “Yes.”

b. To determine when and where you want your actual price to be visible to the customer, set **Display Actual Price** to one of the following:

- In Cart
- Before Order Confirmation
- On Gesture (on click)

5. When complete, click the **Save Config** button.

To configure MAP for a specific product:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, click to expand the **Minimum Advertised Price** section. Then, do the following:
   a. Set **Enable MAP** to “Yes.”
   b. Set **Apply MAP (Default Value)** to “No.”
   c. Complete the remaining settings as needed. Then, click the **Save Config** button.
3. Select **Catalog > Manage Products**, and open the product record.
4. In the Product Information panel on the left, select**Prices**. Then, do the following:
   a. Enter your **Price** that is lower than the manufacturer’s minimum advertised price.
   b. Set **Apply MAP** to “Yes.”
   c. Set **Display Actual Price** according to your preference.
   d. Enter the **Manufacturer’s Suggested Retail Price.**
5. When complete, click the **Save** button.

Minimum Advertised Price Configuration

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable MAP	Website	Activates Minimum Advertised Price for your store. Options include: Yes / No
Apply MAP	Website	Applies MAP by default to all products in the store. Options include: Yes — Initially hides all prices in the store, and displays them according to the Display Actual Price setting. No — Does not apply MAP to all products, by default. If MAP is enabled, it can still be applied to products individually.
Display Actual Price	Website	Determines where the actual price of a product is visible to the customer.Options include:

FIELD	SCOPE	DESCRIPTION	
		In Cart	Displays the actual product price in the shopping cart.
		Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is confirmed.
		On Gesture	Displays the actual product price in a popup when the customer clicks the "Click for price" or "What's this?" link.
Default Popup Text Message	Store View	The popup text message that appears when the customer selects the "Click for price" link from a category list or product view page.	
Default "What's This" Text Message	Store View	The pop-up text message that appears when the customer clicks the "What's this?" link from the product view page.	
Manufacturer's Suggested Retail Price	Store View	The retail price as suggested by the manufacturer (MSRP).	

Product Group Price

Product Group Price enables you to set promotional prices for different customer groups at the product level. Group price can be used with the following product types:

- Simple
- Configurable
- Virtual
- Bundle
- Downloadable

For bundle products, the group price is specified as a discount percentage. If bundle items have their own group prices set for the same customer group, then the discount specified for the whole bundle product applies to the group prices.

For the Grouped and Gift Card product types, the Group Price is not applied, even if these product types are selected in the Apply To field of the group_price attribute. In this case, for Grouped products, the Group Price field does not appear on the Prices page in Product Information. For Gift Card products, the Group Price field appears, but is not used.

Product Group Price Setup

The display of group prices in the store follows the general logic used for Magento pricing. If, in addition to the regular price, a product has promotional price(s), the lowest price appears in the storefront. If a product custom option has price set as a percentage, then the lowest promotional price is used as base for the calculation. The same logic applies when the associated products (the options) of a configurable product have prices set as a percentage.

Examples: Promotional Prices in Storefront

The following table illustrates how the minimum promotional price logic is implemented. The table provides several examples, but does not include all possible combinations of promotional price settings.

ADMIN PRICE	PRICE IN STOREFRONT
Price = $4 Special Price = $5 Tier Price = $3	For customers from the tier price group(s): $ 4 As low as: $3 For customers from other groups: $4
Price = $5 Special Price = $3 Tier Price = $4	For all customers: Regular Price: $5 Special Price: $3
Price = $5 Special Price = $3 Tier Price = $4 Price after a catalog price rule applied = $2	For customers from the catalog price rule group: ~~Regular Price: $5~~ Special Price: $2 For customers from other groups: ~~Regular Price: $5~~ Special Price: $3
Price = $5 Special Price = $4 Group Price = $3	For customers from the price group: ~~Regular Price: $5~~ Special Price: $3 For customers from other groups: ~~Regular Price: $5~~ Special Price: $4

Important! When a group price is set for a product, then the catalog price rules for the corresponding customer groups are applied to the group price, not to the regular price.

To set up a group price for a product:

1. On the Admin menu, select **Catalog > Manage Products**. Then in the list, click to open the product in edit mode.
2. In the panel on the left, click **Prices**. Then, do the following:
   a. In the Group Price field, click the **Add Group Price** button.
   b. Select the target **Customer Group** and enter the product **Price** for the group. The Website column defines the scope of the Group Price field.
3. When complete, click the **Save** button.

Group Price Attribute

The list of product types for which group price can be specified is defined in the `group_price` attribute properties. The product types that can be used with the attribute are configured in the Apply To property.

Regular Price

The value of the price system product attribute, which by default, corresponds to the Price specified on the Prices tab in Product Information.

Promotional Price

A product price that is defined by any of the following system product attributes: `special_price`, `group_price`, or `tier_price`; or the resulting price after a catalog price rule is applied.

Notes

Chapter 16:

Product Images

Using images of consistent quality, size, and proportion gives your product catalog a professional look with commercial appeal. If you have a large catalog with several images per product, you can easily have hundreds, if not thousands of product images to manage. Before you get started, it's a good idea to establish a naming convention for your image files, and organize them so you can find the originals if you ever need them.

The Images tab in the Product Information panel is used to upload and manage individual images for the current product. You can upload multiple images for each product, with different images for each website or store view. However, if you have a large quantity of images to manage, it is more efficient to import, rather than upload each one individually. To learn more, see: Importing Product Images.

Product Images

Thumbnail Gallery

The thumbnail gallery on the product page can be used to display multiple images of the product. Although the position of the gallery varies by theme, it is usually just below the main image on the product page. When a thumbnail is clicked, the image appears, by default in a popup window that allows you to browse through the images.

Thumbnail Gallery Popup

Light Boxes and Sliders

Many stores use a third-party light box or slider to display product images in a more elegant fashion. Typically with a light box, whenever a thumbnail image is clicked, it replaces the main image on the page. You can use the left and right arrows in the light box to browse through the images, or click a thumbnail to view a specific image. When zoom is activated, you can click the main image and move the cursor around to magnify different parts of the image. The magnified selection appears to the right of the image.

Zoom

Magento displays a magnified portion of the image on mouseover, provided that you have uploaded a larger image that can be used to zoom in for a closer look.

Zoom

Image Size and Type

As a best practice, you should standardize the size of your images so they appear at the highest possible resolution. A single product image can be displayed in several different sizes throughout your catalog. In addition to the main image on the product page, are smaller images and thumbnails.

The following image types determine how images are used in your catalog. If you have only one product image, you can use the same image for each type. If you do not assign an image to each type, a placeholder image will mark the place in the catalog.

Thumbnail

Thumbnail images appear in the thumbnail gallery, shopping cart, and in some blocks such as Related Items. Example size: 50 x 50 pixels

Small Image

The small image is used for the product images in listings on category and search results pages, and to display the product images needed for sections such as for Up-sells, Cross-sells, and the New Products List. Example size: 470 x 470 pixels

Base Image

The base image is the main image on the product detail page. Image zoom is activated if you upload an image that is larger image than the image container. Example Size:

470 x 470 pixels (without Zoom)
1100 x 1100 pixels (with Zoom)

Media Image

(Optional) A media image gives you the ability to associate additional images with a product that are not actually images of the product. For example, you might include the product logo, care instructions, or an image of the ingredients from a food label.

If you add a media image attribute to the attribute set of a product, it appears as an additional image type, along with Base, Small, and Thumbnail. A media image can be set to “Exclude” so it doesn't appear in the thumbnail gallery.

Adding Product Images

The Images tab is used to upload and manage images for a single product. You can upload multiple images for the product, and maintain different images for each website or store view. However, if you have many images to manage, you might prefer to import them, rather than upload product images individually. Because Magento does not convert image file formats, any file conversion that is necessary must take place before the files are uploaded or imported.

Adding Product Images

To add product images:

1. If the images are to be used for only a specific store view, set **Choose Store View** in the upper-left corner to identify the view where the images will be used.
2. In the panel on the left, click **Images**.
3. Click the **Browse Files** button, and select the product images files you want to upload to your store.
4. Click the **Upload Files** button to upload the selected images to your store. Then, for each image, do the following:
   a. Enter a descriptive **Label** for the image. This text appears on mouseover and can improve indexing by search engines.
   b. If using multiple images, enter a numeric value in the **Sort Order** field to determine the sequence in which they appear in the thumbnail gallery.

c. To prevent an image from being included in the thumbnail gallery, click the **Exclude** checkbox. For example, if the product has only one image, there's no reason to include it in the gallery.

d. To delete any image, select the **Remove** checkbox.

5. When complete, click the **Save and Continue Edit** button.

To add images to the gallery:

Follow the same process for adding a new product image. For best results, gallery image files should be the same size and proportion as the main product image.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Image		On mouseover, a thumbnail of each uploaded image appears.
Label		The label is the descriptive "Alt" text that appears on mouseover. Including a label for each image improves indexing by search engines, and accessibility for people who use screen readers.
Sort Order		Determines the order in which images are displayed in the gallery.
Thumbnail	Store View	The Thumbnail image is used in the shopping cart and in some blocks, such as Related Items.
Small Image	Store View	The Small Image is used in product listings on the category and search results pages, and to display product images in additional sections such as Up-sells, Cross-sells, and the New Products List.
Base Image	Store View	The Base Image is the main image on the product page, and is also used to produce the magnified area displayed during image zoom.
Media Image	Store View	(Optional) The Media Image appears only if an attribute of the Media Image type is included in the attribute set.

FIELD	SCOPE	DESCRIPTION
Exclude		Select the Exclude checkbox to prevent the image from being listed in the thumbnail gallery.
Remove		Select the Remove checkbox to delete the image. All selected images are deleted when the product record is saved.

Placeholders

Magento uses a temporary image as a placeholder until permanent product images are available. The initial placeholder image is the Magento logo, which you can replace with placeholder images of your own design.

Product Placeholder Image

To upload placeholder images:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Product Image Placeholders** section. Then, do the following:
   a. For each image type, click the **Browse** button to upload the placeholder image you want to use for the **Base Image**, **Small Image**, and **Thumbnail** images. If you like, you can use the same image for each type.
   b. When complete, click the **Save Config** button.

Product Image Placeholder Configuration

Watermarks

If you have gone to the expense of creating your own original product images, there is not much you can do to prevent unscrupulous competitors from stealing them with the click of a mouse. However, you can place a watermark on each image to identify it as your property and make it a less convenient target. The watermark file can be either a .jpg (jpeg), .gif, or .png image.

Example: Watermark Positions

The watermark used in the following examples is a .png file 470 x 470 pixels square, with a black logo and transparent background. The size and opacity were later adjusted to 100 x 100 pixels at 10% using the watermark configuration settings in the Admin panel. You can experiment with different watermark settings until you find the look you want.

None

Tile

Top Left

Top Right

Bottom Left

Bottom Right

Center

Stretch

To place watermarks on product images:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Design**.
3. Click to expand the **Product Image Watermarks** section. Then, complete the following steps for the Base, Small, and Thumbnail images:
   a. Enter the **Watermark Default Size**, in pixels. For example: 200 x 300
   b. Enter the **Watermark Opacity**, as a percentage. For example: .40
   c. Click the **Browse** button and select the Watermark image file to upload.
   d. Set **Watermark Position** to your preference.
4. When complete, click the **Save Config** button.

Product Image Watermarks

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Base Image Watermark Default Size	Store View	The default size of the watermark for the Base Image. (For example, 470 x 470)
Base Image Watermark Opacity, Percent	Store View	The percentage of opacity applied to the watermark for the Base Image.
Base Image Watermark	Store View	The file with the watermark image to be uploaded for the Base Image. (The image file can be .jpg (jpeg), .gif, and .png.)
Base Image Watermark Position	Store View	The position of the watermark for the Base Image. Options include: Stretch Tile Top/Left Top/Right Bottom/Left Bottom/Right
Small Image	Store View	(Same as above.)
Thumbnail Image	Store View	(Same as above.)

Shopping Cart Thumbnails

The thumbnail images in the shopping cart give customers a quick overview of each item. However, for products with multiple options, the standard product image may not match the actual item purchased. If the customer purchased a pair of red shoes, ideally, the thumbnail in the shopping cart should show the product in the same color.

Thumbnails for grouped and configurable products can display either the image from the "parent" or associated "child" product in the current store view.

Shopping Cart Thumbnail

To configure shopping cart thumbnails:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Checkout**.
3. Click to expand the **Shopping Cart** section, do the following:

Shopping Cart Configuration

   a. Set **Grouped Product Image** to one of the following:
      - Product Thumbnail Itself
      - Parent Product Thumbnail
   b. Set **Configurable Product Image** to one of the following:
      - Product Thumbnail Itself
      - Parent Product Thumbnail
4. When complete, click the **Save Config** button.

Notes

Chapter 17:

Swatches

Swatches provide an alternate way to display the selection of options for configurable products. Rather than choosing an option from a drop-down list, customers can make their selection by clicking a swatch. Configurable swatches can be used on the product page, product list, and in layered navigation.

Color and Size Swatches on Product Page

In this chapter, you will learn how to use swatches to make the presentation of configurable products more appealing and informative.

Topics in this chapter include:

- How Swatches are Used
- Swatch Configuration
- Adding New Attribute Values
- Preparing Swatch Images
- Uploading Swatch Images
- Swatch Images Cache

How Swatches are Used

On the product page, swatches can be used to indicate the combinations of color and size that are currently available. Any option that is not available is crossed out. In the following example. the pistachio loafer is available only is size 8, so the rest of the sizes are crossed out. You can click each color swatch to see the available sizes, and click each size swatch to see the available colors. When a swatch is selected, the value appears in the input field, and the selected swatch is outlined as the current selection.

Unavailable Size Swatches Crossed Out

Swatches can be set up to display the corresponding product image when the swatch is clicked. For example, from the product list or product page, you can click the swatch to change the color of the main image.

Text-Based Swatches

If there isn't an image available for a swatch, the attribute value appears as text. A text-based swatch is like a button with a text label, and behaves in the same way as a swatch with an image. In the following example, the color swatches are identified with a text label for the color name, just as the shoe size swatches have a text label for the size. If the size attribute values were "Small," "Medium," and "Large," rather than numbers, then that text would appear in the swatches instead.

Text-Based Color and Size Swatches

Swatches in Layered Navigation

Swatches can also be used in layered navigation, if the Use in Layered Navigation property of the corresponding attribute is set to "Yes." The following example shows both text-based and color image swatches in layered navigation.

Color Swatches in Layered Navigation and Product List

Swatch Configuration

This discussion begins with the understanding that you already have configurable products in your catalog. If you do not have working configurable products, you will need to set them up to continue.

General Settings

Step 1: Complete the Configuration

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Configurable Swatches**.
3. Click to expand the **General Settings** section. Then, do the following:

a. Set Enabled to "Yes."

b. In the list of **Products Attributes to Show as Swatches in Product Detail**, select each attribute whose values you want to appear as a swatch.

The list includes only the attributes that can be used to create configurable products. The attribute must be the Dropdown type, and Use to Create Configurable Product must be set to "Yes."

c. Select the **Product Attribute to Use for Swatches in Product Listing**.

Because of the limited space in the product listing, only one attribute can chosen to appear as a swatch in the product list.

4. To set the size of the swatches used on the product detail page, do the following:

a. Click to expand the **Swatch Dimensions on Product Detail Page** section.

b. Enter the **Width** and **Height** in pixels.

Just for reference, the swatches in the product page examples in this guide are 35 pixels square.

Swatch Dimensions on Product Detail Page

5. To set the size of the swatches used in the product listing, do the following:

a. Click to expand the **Swatch Dimensions in Product Listing** section.

b. Enter the **Width** and **Height** in pixels.

Swatch Dimensions in Product Listing

6. To set the size of the swatches used in layered navigation, do the following:

a. Click to expand the **Swatch Dimensions in Layered Navigation** section.

b. Enter the **Width** and **Height** in pixels.

Swatch Dimensions in Layered Navigation

7. When complete, click the **Save Config** button.
8. If prompted that the cache needs to be refreshed, click the **Cache Management** link in the message at the top of the workspace. Select the checkbox of each invalid cache. Then, with the **Actions** control set to "Refresh," click the **Submit** button.

   While you're in Cache Management, notice the Flush Swatch Images Cache button in the Additional Cache Management section at the bottom of the page. If you ever need to update or replace existing swatches, this is how you can clear all cached swatches.

Step 2: Test the Swatches in Your Store

1. Verify that the swatches work correctly from your storefront. Even without any swatch images, the text-based swatches should appear in the store, and work correctly.
2. If any drop-down options from the configurable product are missing from layered navigation, do the following:
   - Verify that the attribute frontend property, **Use in Layered Navigation** is set to "Yes."
   - Return to **Cache Management** and click the **Flush Magento Cache** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
General Settings		
Enabled	Store View	Enables swatches for the configurable products in your store. By default, swatches are not enabled. Options include: Yes / No
Product Attributes to Show as Swatches in Product Detail	Store View	Lists all drop-down attributes that can currently be used with swatches. Select each attribute that you want to appear as a swatch on the product page. You can include more attributes in the list if they meet the requirements for configurable product options.
Product Attributes to Use for Swatches in Product Listing	Store View	Select one attribute to appear in the product listing.
Swatch Dimensions on Product Detail Page		
Width	Store View	The width, in pixels, of swatches that appear on the product page.
Height	Store View	The height, in pixels, of swatches that appear on the product page.

FIELD	SCOPE	DESCRIPTION
Swatch Dimensions in Product Listing		
Width	Store View	The width, in pixels, of swatches that appear in the product list.
Height	Store View	The height, in pixels, of swatches that appear in the product list.
Swatch Dimensions in Layered Navigation		
Width	Store View	The width, in pixels, of swatches that appear in layered navigation.
Height	Store View	The height, in pixels, of swatches that appear in layered navigation.

Swatch dimensions do not include any border that might be added with CSS.

Adding New Attribute Values

As you add products to your catalog, you will need to update the attribute values that correspond to each swatch. For example, if you sell clothing, you will need to add new colors to the color attribute to match the products. You can add as many values as you need to any attribute that is represented by a swatch. We use color as an example, but the process is the same for any attribute you might use.

Add New Color Value

To add new colors:

1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
2. In the list, open the color attribute in edit mode.
3. In the panel on the left, click **Manage Label / Options**. Then, do the following:
   a. In the list under Manage Options, click the **Add Option** button.
   b. Under Admin, enter the names of the color as you want it to appear when working from the Admin. Then, enter the name of the color for each language supported, as you want it to appear in the storefront.
   c. To determine the order in which the colors appear, enter a number in the position column.
   d. Repeat this process for as many colors as you need.
4. Click the **Save Attribute** button.
5. When prompted to refresh the cache, click the **Cache Management** link. Then, refresh any cache that is invalid.

Preparing Swatch Images

A swatch image can provide an accurate representation of color, and also illustrate a pattern or texture. There are two different methods you can use to create swatches for your products. You can use either method, or a combination of both.

- The default method is to create global swatches that represent a plain color, and upload them to Media Storage.
- You can also create custom swatches that illustrate a fabric or texture, and upload them to a specific product.

The size of the swatch that is set in the configuration, and the size of the uploaded image determine the level of detail that can be seen in the swatch. To show a pattern clearly, make sure that the image is large enough to capture the essence of the design. To show a fabric weave, texture, or grain of leather, capture the image at as high a resolution as possible, and crop the image as close to the display size of the swatch as possible. Any reduction in size makes the detail harder to see.

Capture Swatch from Product Image

To capture a swatch, you can open the main product image in a photo editor, and crop a section from the image. You can also use the eyedropper tool to pick up the exact color you need, and fill the swatch with the selected color. If you have the product available, you can take a photograph of the fabric with your camera. The swatches below were captured from the side of a shoe in the main product image.

Swatch Samples

Uploading Swatch Images

The swatches folder in Media Storage is the most common place where uploaded swatch images are stored. Swatch images that are uploaded to Media Storage are globally available and can be used by any product. The name of each uploaded image file must exactly match the attribute value that it represents. In this example, each file name is a color.

Swatches in Media Storage

Swatches can also be associated with a specific product, and uploaded directly to the product's thumbnail gallery. Swatches that are uploaded directly to a product do not appear in the gallery or in layered navigation. However, in some cases, there are advantages to using this method. It is also the recommended method for languages with a non-Latin character set, such as Arabic, Chinese, Cyrillic, or Japanese.

The system uses a "fall back" method to locate swatches. It looks first to see if there are any swatches associated with the product image. If it doesn't find a swatch, it then looks in Media Storage.

Method 1: Upload Swatches to Media Storage

Before uploading swatch images, make sure that the file names exactly match the corresponding attribute values. For example, if you upload a file named "gray.png," it will match the attribute value "Gray," but not "Grey."

File names are converted to lowercase. In addition, any characters other than a-z and 0-9 are replaced with a hyphen. Therefore, the swatch name "Royal Blue" becomes "royal-blue."

If you have access to the server, swatch files can be uploaded to the following location:

```
[Magento install directory]/media/wysiwyg/swatches
```

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. In the list, click to open any page in edit mode.

   The purpose of this step is to launch the editor. Media Storage can be accessed from any place the editor is used.
3. In the panel on the left, select **Content**.
4. From the editor, click the **Insert Image** button. In the directory tree on the left, click the **swatches** folder, and do the following:

   a. Click the **Browse** button, and locate the swatch image that you want to upload.

   You can upload individual images, or multiple images at the same time.

   b. Click the **Upload Files** button to copy the file to Media Storage.

   Newly uploaded images appear at the bottom of the list.

Uploading Multiple Swatches

5. When you are done, click the **Close** button in the upper-left corner of the Media Storage window. Then, click the **Back** button to exit the editor.
6. If prompted to refresh the cache, click the **Cache Management** link in the message at the top of the workspace, and refresh any cache that is invalid.
7. Go to your storefront to verify that the swatches work correctly. The text-based swatches should now be replaced with the swatch images that you uploaded.
8. If any options from the configurable product are missing from layered navigation, return to **Cache Management** and click the **Flush Magento Cache** button.

Method 2: Upload Swatches as Product Images

This method can be used for swatch images that are associated with a specific product. Swatches uploaded with this method take precedence over those in Media Storage.

1. On the Admin menu, select **Catalog > Manage Products**.
2. Find the product the configurable product in the list, and open the record in edit mode.
3. If the image is for a specific store view, set **Choose Store View** to the store view where the images will be used.
4. In the panel on the left, click **Images**. Then, do the following:
   a. Click the **Browse Files** button, and select the product images files you want to upload to your store.
   b. Click the **Upload Files** button to upload the selected images to your store.

Product Swatch with Label

   c. Enter a **Label** for each swatch image uploaded, in the following format: color name, followed by a hyphen, and the word "swatch." This label identifies the image as a swatch that is associated with this specific variation of the product.

```
color-swatch
```

   Do not select any of the remaining options. It is not necessary to select the Exclude checkbox, because by default, Swatch images do not appear in the thumbnail gallery.

5. When complete, click the **Save** button.

6. When prompted to clear the cache, click the **Cache Management** link in the message at the top of the workspace, and refresh any cache that is invalid.

Setting Up Dynamic Images

Dynamic images change when the corresponding swatch is clicked, and can be used on the product and product listing pages. The easiest way to understand this is to see how the products are set up.

Swatches

With this technique, each associated product must have an image that depicts the variation, even if the products are different sizes of the same color. These are the images that appear dynamically when the swatch is clicked. As with all swatch images, the dynamic image does not appear in the thumbnail gallery.

Method 1: Upload Images to Configurable Product

When you view this product in the store and click a swatch, the corresponding product appears as the main product image. You can click any swatch to change the image. Also, notice in the example below that the fourth swatch is a miniature version of the Royal Blue product image. Because there isn't a Royal Blue swatch available, the fall-back method used the product image with the "Royal Blue" label.

Dynamic Product Image

1. Each associated simple product has a single product image that depicts the variation. Because these images are not swatches, they do not need the "-swatch" suffix. The product variations used in this example are labeled "Royal Blue," "Pink," and "Red."

Image Uploaded to Associated Simple Product

2. The Color attribute for each variation is set to the correct color.

Set Value of Color Attribute

3. In addition to the standard product images, images for each product variation are also uploaded to the configurable product, and given labels that exactly match the corresponding color attribute values. No options are selected for the product variations. Although these images are not swatches, they will be used if no other swatch is available.

Images Uploaded to Configurable Product

Method 2: Upload Swatches to Configurable Product

This method features custom swatches that are uploaded to the configurable product. Each associated product has a product image that depicts the variation. When you click each swatch, the corresponding product image appears.

Dynamic Image

1. An image is uploaded to each associated product that shows the product variation.

Image Uploaded to Associated Simple Product

2. The Color attribute of the product variation is set to the correct color.

Set Value of Color Attribute

3. In addition to the standard product images, a complete set of the swatch images is uploaded to the configurable product, and labeled as a swatch for each variation. In this example, the swatches are named:

   - Royal Blue-swatch
   - Charcoal-swatch
   - Red-swatch
   - Khaki-swatch

Images Uploaded to Configurable Product

Swatch Localization

If you use a language other than English for attribute values, it is recommended that you upload swatch images to each configurable product, rather than to Media Storage. Files uploaded to Media Storage can only include the characters a-z and 0-9. Characters from non-Latin alphabets, such as Arabic, Chinese, Cyrillic, and Japanese are not recognized by the system. To learn more, see the developer documentation.

Clearing the Cache

Swatch images are resized and cached before they are used. Swatch images are stored on the server in the Magento installation directory, at the following location:

```
[Magento install directory]/media/catalog/swatches/
```

Whenever changes are made to existing swatch images, the swatch cache must be flushed before the changes can be seen in the store.

To flush the swatch cache:

1. On the Admin menu, select **System > Cache Management**.
2. In the Additional Cache Management Section, click the **Flush Swatch Images Cache** button.

Flush Swatch Images Cache

Notes

Enterprise
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Search & SEO

Chapter 18:

Storefront Search Tools

Research shows that people who use search are more likely to make a purchase than those who rely on navigation alone. In fact, according to some studies, people who use search are nearly twice as likely to make a purchase.

Magento Enterprise Edition has a powerful search engine that you can use as is, or enhance to make even more effective. In this chapter , we will examine the search tools that are available to your customers while shopping in your store, including:

- Quick Search
- Advanced Search
- Search Results

In addition, Magento's layered navigation gives your customers the ability to filter product options by price, manufacturer, or any other criteria to reduce the time it takes to make a purchase.

Quick Search

The Quick Search box in the upper-right corner helps visitors find products in your catalog. The search text can be the full or partial product name, or any other word or phrase that describes the product.

To use quick search:

1. Type the first few letters of what you are looking for into the search box.
2. Press either the **Enter** key or the button to the right of the search box to retrieve a list of matching products from the catalog.

Quick Search

Advanced Search

Advanced Search lets shoppers search through your catalog by entering values into a form. Because the form contains multiple fields, a single search can include several parameters. The result of the search is a list of the products that match the search criteria. A link to Advanced Search is in the footer of your store.

Advanced Search

Each field in the form corresponds to an attribute from your product catalog. You can determine which fields to include by setting the attribute frontend properties to "Include in Advanced Search."

As a best practice, you should include only the fields that your customers are most likely to use to find a product, because too many can slow down the search.

To use advanced search:

1. In the footer of the store, click the **Advanced Search** link.
2. In the Search Settings form, enter any value you want to match in as many fields as necessary. You can find records based on a full or partial match.
3. Click the **Search** button at the bottom to display the results.

Search Settings

4. If you don't see what you are looking for in the search results, click **Modify your search** and try another combination of values.

Search Results

Search Results

Search Results include all products that match the parameters entered in the Quick Search box or the Advanced Search form. All pages that list products have the same controls. The only difference is that some display the result of a search query, and others display the result of navigation.

Search results can be viewed in a grid or list format, and the records can be sorted by any number of parameters. Page controls are used to sort the list, change the format, and to advance from one page to the next. Depending on the layout, the left column of the page may include layered navigation under the “Shop By” heading, with products listed by category and attribute.

Search Results with Page Controls

Page Controls

CONTROL	DESCRIPTION
View As	Displays the list in either a Grid or List format.
Sort By	Changes the sort order of the list.
Show Per Page	Determines how many products appear per page.
Pagination Links	Navigation links to other pages.

To configure the page settings:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Frontend** section. Then, adjust the settings according to your preference.
4. When complete, click the **Save Config** button.

Catalog Frontend Search Configuration

Field Descriptions

FIELD	SCOPE	DESCRIPTION
List Mode	Store View	Determines the format of the search results list. Options include: Grid Only — Formats the list as a grid of rows and columns.Each product appears in a single cell of the grid. List Only — Formats the list with each product on a separate row. Grid (default / List) — Products appear in Grid view, but can be toggled to List view. List (default / Grid) — Products appear in List View, but can be toggled to Grid view.
Products per Page on Grid Allowed Values	Store View	Determines the number of products displayed in Grid View. To provide a selection of options, enter multiple values separated by commas.
Products per Page on Grid Default Value	Store View	Determines the number of products displayed per page by default, in Grid View.
Products per Page on List Allowed Values	Store View	Determines the number of products displayed in List View. To provide a selection of options, enter multiple values separated by commas.
Products per Page on List Default Value	Store View	Determines the number of products displayed per page by default, in List View.
Allow All Products per Page	Store View	If set to “Yes,” includes the “ALL” option in the “Show per Page” control.
Product Listing Sort by	Store View	Determines the sort order of the search results list. The selection of options is determined by the Display Settings of the category and the available attributes. The default is set to “Use All Available Attributes,” and typically includes: Best Value

FIELD	SCOPE	DESCRIPTION
		Name Price
Use Flat Catalog Category	Global	Enables the flat category structure. Options include: Yes / No
Use Flat Catalog Product	Global	Enables the flat product structure. Options include: Yes / No
Allow Dynamic Media URLs in Products and Categories	Store View	Allows dynamic media URLs, rather than static URLs.

Popular Search Terms

The Popular Search Terms pages lists the search terms that have been used by visitors to your store, and ranks them by popularity. Search terms appear in a “tag cloud” format, where the size of the text indicates the popularity of the term. The link to the Popular Search Terms page is located in the footer of your store.

By default, Popular Search Terms is enabled as a search engine optimization tool, but has no direct connection to the catalog search process. Because the Search Terms page is indexed by search engines, any terms included on the page will help improve your search engine ranking and the visibility of your store.

Popular Search Terms

To configure Popular Search Terms:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Catalog**. Then, do the following:
   a. Click to expand the **Search Engine Optimizations** section.
   b. Set **Popular Search Terms** to "Enable."
3. When complete, click the **Save Config** button.

Notes

Chapter 19:

Catalog Search Configuration

This chapter explains how to configure Catalog Search for your specific installation. The available search options depend on the search engine that is used for your Magento installation. By default, Magento uses MySQL. Follow the instructions that apply to your system.

MySQL

MySQL is the default search engine used by Magento Enterprise Edition.

Solr

Solr is not included in Magento Enterprise Edition, and must be installed separately. If your Magento installation uses Solr, there is a slightly different set of configuration options and features.

MySQL Catalog Search

By adjusting the Catalog Search configuration, you can control the behavior of the search operations and determine the size of valid query text, and the display of search recommendations.

To configure catalog search:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Catalog**. Then, click to expand the **Catalog Search** section.

Catalog Search (using MySql Fulltext)

3. To limit the length and word count of search query text, do the following:
   a. Set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
   b. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.
   c. Set **Maximum Query Words Count** to the maximum number of words that can be submitted in a query.
4. Accept the default **Search Engine**, "MySql Fulltext."
5. Set **Search Type** to one of the following:

Like	To perform a search based on individual keywords.
Fulltext	To perform a search based on the full text of each attribute, ranked by relevance.
Combine (Like and Fulltext)	To perform a search based on a combination of the two types, matching keywords and taking relevance into consideration.

6. To limit the number of records that can be used with layered navigation, enter the maximum number allowed in the **Apply Layered Navigation if Search Results are Less Than** field. To allow any number of records, enter 0.
7. To display related search terms as recommendations, set **Enable Search Recommendations** to "Yes." Then, do the following:
   a. In the **Search Recommendations Count** field, enter the maximum number of recommendations displayed for a search.
   b. To show the number of recommendations per term in parentheses after the recommendation, set **Show Results Count for each Recommendation** to "Yes."
8. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Minimal Query Length	Store View	The minimum number of characters allowed in a catalog search.
Maximum Query Length	Store View	The maximum number of characters allowed in a catalog search.
Maximum Query Words Count	Store View	The maximum number of words allowed in a query.
Search Engine	Global	Identifies the search engine used to process requests for catalog data. By default, Magento Enterprise uses the MySql Fulltext search engine. Options include: MySql Fulltext / Solr
Search Type	Store View	Determines the search operation performed by the MySql engine. Options include: Like — Performs a search based on individual keywords. Fulltext — Performs a search based on the full text of each attribute and ranks each by relevance. Combine (Like and Fulltext) — This combination of Like and Fulltext matches by keyword, but takes into consideration its relevance.

FIELD	SCOPE	DESCRIPTION
Apply Layered Navigation if Search Results are Less Than	Store View	Sets the maximum number of search results that are displayed as a list. Any results over the number are shown as layered navigation. To apply layered navigation to all search results, enter 0. Using layered navigation for all search results can impact performance.
Enable Search Recommendations	Store View	Determines if search recommendations are offered when a search returns no results. Options include: Yes / No
Search Recommendations Count	Store View	Specifies the number of search terms offered as recommendations. By default, no more than five are shown.
Show Results Count for Each Recommendation	Store View	When set to "Yes," the number of products found for the proposed search recommendation is shown in the brackets. Options include: Yes / No

Solr Catalog Search

Solr is a standalone, enterprise-scale search server that communicates easily with applications. Because Solr is highly scalable, it is used to power some of the world's most high-traffic Internet sites.

Solr provides improved search performance and search results relevancy, support for spelling, synonyms and stop words, and improved layered navigation performance. Solr is especially recommended for sites with heavy traffic and search loads. Products are added to the search engine index as each product is saved in the Admin, so the index is kept up to date without any need for manual intervention.

Magento quick search performed by the Solr search engine provides the following options:

- Search terms suggestions based on the corrected customer's misspelling
- Search results according to the specified weight of an attribute
- Search results for layered navigation

All of the attributes that are available for layered navigation are added to Solr index. As a result, Solr can also be used to generate the layered navigation. To add these attributes to Solr search results, the store administrator must enable Solr for catalog navigation.

Search Suggestions

Solr can identify misspelled words and offer suggestions. When a customer makes a spelling mistake in a search term, the system displays the message, “Did you mean:” with a link to the suggested product. Depending on the search suggestion configuration, more than one suggestion can be offered to the customer.

To configure suggestions:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Catalog Search** section, and do the following:
   a. Verify that **Search Engine** is set to “Solr.”
   b. Set **Enable Search Suggestions** to “Yes.”
   c. In the Search Suggestions Count field, enter the number of suggestions to be offered to the customer. The default value is 2.
   d. Set **Show Results Count for Each Suggestion** to “Yes.” (Depending on the store theme, this number is usually shown in brackets next to the suggestion.)
4. When complete, click the **Save Config** button.

Weighted Search

With Solr enabled, product attributes that are enabled for quick search have an additional Search Weight parameter. This parameter denotes the priority a specific attribute has in the Solr search. If Solr is enabled, it is also used for Advanced Search, but the search weight is not used there in generating search results.

When a customer enters a term in the search field on your web store, one of the parameters that the Solr search engine takes into account in generating results is the attribute search weight. Attributes whose search weight is greater will be searched and returned first by Solr.

For example, if there are two attributes in the system, “color” with a search weight of 1 and “description” with a search weight of 3. When a customer searches for the word “red,” Solr will return a list of products whose color attribute is red and will not include in the list the products whose description contains the word “red.” This result happens because the search weight of the “color” attribute is higher than that of the “description” attribute.

To set the search weight properties of an attribute:

1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
2. Find the attribute in the list, and click to open the record.
3. Scroll down to the Frontend Properties section, and do the following:
   a. To include the attribute in Quick Search box queries, set **Use in Quick Search** to “Yes.”
   b. To include the attribute as a field on the Advanced Search form, set **Use in Advanced Search** to “Yes.”
   c. To establish the search value of the attribute, set **Search Weight** to a number from 1 to 5, where 1 is the greatest weight, and 5 is the least.

      Greater search weights have higher priority in returned results. If no value is specified, all attributes have a search weight of 1.
4. When complete, click the **Save Attribute** button.

Solr Configuration

Solr's additional search options can be configured by adjusting the Catalog Search settings. To learn more, see How to Use the Solr Search Engine With Magento Enterprise Edition in the Knowledge Base.

To configure Solr catalog search:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Catalog**. Then, click to expand the **Catalog Search** section.
3. Verify that **Search Engine** is set to "Solr."
4. To limit the length and word count of search query text, do the following:
   a. Set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
   b. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.
   c. Set **Maximum Query Words Count** to the maximum number of words that can be submitted in a query.
5. To offer search terms as suggestions, do the following:
   a. Set **Enable Search Suggestions** to "Yes."
   b. To display the number of times each suggested term has been used as a search term, set **Show Results Count for Each Suggestion** to "Yes."
6. To display related search terms as recommendations, set **Enable Search Recommendations** to "Yes."
7. When complete, click the **Save Config** button.

Solr Catalog Search

To configure catalog navigation:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Catalog Search** section, and do the following:
   a. Verify that **Search Engine** is set to "Solr."
   b. Set **Enable Solr Engine for Catalog Navigation** to "Yes."
4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Minimal Query Length	Store View	The minimum number of characters allowed in a catalog search.
Maximum Query Length	Store View	The maximum number of characters allowed in a catalog search.
Maximum Query Words Count	Store View	The maximum number of words allowed in a query.
Search Engine	Global	Identifies the search engine used for the site. For this configuration, the search engine is: Solr
Solr Server Hostname	Global	The fully qualified host name or IP address of the Solr server.
Solr Server Port	Global	Identifies the port used by the Solr server. Any unused port can be assigned to Solr.
Solr Server Username	Global	(Optional) The Solr user name, if required for authentication.
Solr Server Password	Global	(Optional) The Solr password, if required for authentication.
Solr Server Timeout	Global	The number of seconds of inactivity before the server times out.
Solr Server Path	Global	Specifies the path to the Solr server. Accept the default entry, unless you have customized Solr or changed the deployment path. The value must match that in webapp_name-value in the Solr installation, and is entered without leading or trailing backslashes.
Indexation Mode	Global	Determines how Solr processes indexed content. Options include:

FIELD	SCOPE	DESCRIPTION	
		Final commit	(Default) Offers better performance than a partial commit. Solr processes the content when you initiate a reindex. Users see content from the previous index, and the store remains available for other requests. Indexing begins after all unneeded data is removed and new data is added. Users see the results of the indexed data immediately.
		Partial commit	All content is removed after reindexing. As content is gradually reindexed, users see only the indexed results.
		Engine autocommit	Content is put into the index queue but is not committed. You must configure Solr to commit at regular intervals (for example, every 5 minutes) or when a certain number of uncommitted items is reached.
Enable Search Suggestions	Store View	Determines if search suggestions are displayed for common misspellings. When enabled, search suggestions are offered for any request that returns no results. Search suggestions can impact the performance of search. Options include: Yes / No	
Search Suggestions Count	Store View	The maximum number of suggestions offered. Default value: 2	
Show Results Count for Each Suggestion	Store View	Determines if the number of search results is shown for each suggestion. (Depending on theme, the number usually appears in brackets after the suggestion.) Options include: Yes / No	
Enable Solr Engine for Catalog Navigation	Global	Determines if Solr is used for layered navigation. Options include: Yes / No	

Chapter 20:

Managing Search Terms

You can learn what your customers are looking for by examining the search terms they use to find products in your store. If enough people are looking for a product that you don't carry, perhaps it's time to add it to your catalog. Meanwhile, rather than have them leave them empty handed, why not redirect them to another product in your catalog? Here are a few ways you can leverage your customers' search terms:

Landing Page

The landing page for a search term can be a content page, a category page, a product detail page, or even a page on a different site.

Suggestions

(Solr Only) If a search returns no results, and there is no alternate landing page for the term, a selection of closely matching terms can be offered as possible solutions. The text, "Did you mean:" appears, followed by a list of suggestions.

Recommendations

Recommendations are similar to suggestions, but are drawn from the selection of related search terms. If a search returns no results, related search terms can be offered as recommendations.

Synonyms

One way to improve the effectiveness of catalog search is to include different terms that people may use to describe the same item. You don't want to lose a sale just because someone is looking for a "sofa," and your product is listed as a "couch." You can capture a broader range of search terms by entering the words, "sofa" "davenport," and "loveseat" as synonyms for "couch," and direct them to the same landing page.

Misspelled Words

Use search terms to capture common misspellings and redirect them to the appropriate page. For example, if you sell wrought iron patio furniture, you know that many people misspell the term as "rod iron," or even "rot iron." You can enter each misspelled word

as a search term, and make them synonyms for “wrought iron.” Even though the word is misspelled, the search will be directed to the page for “wrought iron.”

Adding Search Terms

As you learn new words that people use to search for products in your catalog, add them to your search terms list to direct people the closely matching products in your catalog.

General Information

To add a new search term:

1. On the Admin menu, select **Catalog > Search Terms**.
2. Click the **Add New** button. Then, do the following:
   a. In the General Information section, in the **Search Query** box, type the word or phrase that you want to add as a new search term.
   b. Select the **Store** where the search term will be used. If your store is available in multiple languages, select the applicable store view.
   c. If this term is a synonym for another search term, enter the other term in the **Synonym For** field. Any search for the synonym will be automatically redirected to the page for the other term.
   d. To redirect the search results to another page in your store, or to another website, type the full URL of the target page in the **Redirect URL** field.
   e. If you want this term to be available for use as a suggestion whenever a search returns no results, set **Display in Suggested Terms** to “Yes.”
3. When complete, click the **Save Search** button.

To edit a search term:

1. On the Admin menu, select **Catalog > Search Terms**.
2. Click the row of any record to open the search term in edit mode.
3. Make the necessary changes.
4. When complete, click the **Save Search** button.

To delete a search term:

1. In the list, select the checkbox of the term to be deleted.
2. In the upper-right corner of the list, set the **Actions** control to “Delete.”
3. When complete, click the **Submit** button.

Related Search Terms

The Related Search Terms section of a search term record lets you associate other terms with the search term. You can use the information to keep a running total of how many people are searching for the same thing. Related search terms can also be offered as suggestions and recommendations whenever a search returns no results.

Related Search Terms

To set up related search terms:

1. On the Admin menu, select **Catalog > Search Terms**.
2. In the list, click to open the search term in edit mode.
3. In the Related Search Terms section, do the following:
   a. Click the **Reset Filter** button to generate a list of all search terms.
   b. In the first column, select the checkbox of each search term that is related to the term that is listed in the General Information section of the record. There’s probably more than one page of search terms. Don’t forget to look at the rest!

c. Click the **Save Search** button.

d. In the first column, set the **Search Filter** to "Any."

4. When complete, click the **Search** button.

Field Descriptions

FIELD	DESCRIPTION
Search Query	(Required) Contains the actual text that was used as a search term.
Store	(Required) Identifies the store and/or views where the search term is available.
Number of results	(Required) Displays how many products were returned in the search results since the last time the term was submitted. Only search terms with results are offered as suggestions.
Number of Uses	(Required) Displays the total number of times this term has been used. This number is used to determine the "Top 5 Search Terms" section of the Dashboard report.
Synonym For	If this term is a synonym for another search term, enter the other term in this field. Any searches for the synonym will be redirected to the page for the other term.
Redirect URL	Enter the full URL of the page that is displayed when this search term is used. The Redirect URL can be a product, category, or content page within your site, or a page on another site.
Display in Suggested Terms	Determines if this search term is available for use as a suggestion. For example, you may deliberately enter a misspelled word as a search term, but would not want to use the misspelled word as a suggestion. Options include: Yes / No

Search Recommendations

With search recommendations set up, the store administrator can specify the search recommendations list for a specific search term. The search engine provides the standard search results, and also proposes the list of related terms with the search results. Using search recommendations greatly expands the search results that are available to customers. Search recommendations independent of the search engine and can be used with both MySQL and Solr.

For better performance, Magento also splits the searched word combination into separate words and automatically provides search recommendations for each of them, if these are available in the system. For example, if a visitor searches for the phrase “hp laptop,” the search system splits the phrase into two words, “hp” and “laptop,” and provides five search recommendations for the first term and twelve for the second one.

When search recommendation are enabled and a visitor searches for a term that has search recommendations, the search results appear as well as any related search terms (the search recommendations), followed by the number of times the term has been used. Each recommendation is linked to a catalog page.

To enable search recommendations:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Catalog, select **Catalog**.
2. Click to expand the **Catalog Search** section, and do the following:
   a. Set **Enable Search Recommendations** to one of the following:

Yes	If available, uses Solr instead of the default MySQL search to generate the layered navigation.
No	Uses the Magento-native catalog and layered navigation.

   b. Set **Search Recommendations Count** to your preference.
   c. Set Show Results Count for Each Recommendation
3. When complete, click the **Save Config** button.

Notes

Chapter 21:

SEO Best Practices

Search engine optimization is the practice of fine-tuning the content and presentation of a site to improve the way the pages are indexed by search engines. Magento Enterprise Edition provides a number of tools that you can use to improve the way search engines index your site.

Topics in this chapter include:

- Meta Information
- Sitemap
- URL Options
- Canonical Meta Tag
- URL Redirects

Additional Resources

Site Search

The Seven Forgotten Pages of Magento and How to Optimize Them

A Data-Driven Strategy for Conversion Optimization

Benchmarking Your OMS

Increasing Conversion Rates

Your Store's Meta Data

Your store is loaded with places where you can enter keyword-rich meta data to improve the way search engines index your site. While setting up your store, you might have entered preliminary meta data, with the intention of finishing it later. Over time, you can fine-tune the meta data to target the buying patterns and preferences of your customers.

Meta Title

The meta title appears in the title bar and tab of your browser, and search results listings. The meta title should be unique to the page, and less than 70 characters in length.

Meta Keywords

Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in the meta title and meta description.

retro, hipster, frames, glasses, eyeglasses

Meta Description

Meta descriptions provide a brief overview of the page for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field will accept up to 255 characters.

Sitemap

The default Magento sitemap has links to every product and category in your store, and can help improve the way your products are indexed by some search engines. Like a table of contents, the sitemap also gives visitors a quick overview of the organization of your catalog. To switch between the category and product lists, click the link on the right. By default, the footer of your store includes a link to the sitemap.

The sitemap can be formatted as a nested, tree-like structure, or as a simple list. The number of lines included per page, and the use of indentation is set in your system configuration.

Because the Magento sitemap does not include CMS pages, it is not a complete index to the content on your site. In addition to the default sitemap, it is recommended that you also generate a Google sitemap that can be used for reference when your site is indexed by Google.

To set up the sitemap:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Catalog, select **Catalog**.
2. Click to expand the **Sitemap** section. Then, set the following options according to your preference:
   - Use Tree Like Category Sitemap
   - Minimum Lines per Page

Sitemap Configuration

3. Scroll down the page and click to expand the **Search Engine Optimizations** section. Then, set **Autogenerated Site Map** to “Enable.”
4. When complete, click the **Save Config** button.

Catalog URLs

The URLs that you assign to products and categories play a major role in determining how well your site is indexed by search engines. Before you start building your catalog is an ideal time to consider the available options.

Magento creates both dynamic and static URLs. In addition, there are several configuration options that determine the format of the URLs used for items in your catalog.

Dynamic URL

A dynamic URL is created "on the fly," and might include a query string with variables for the product ID, sort order, and the page where the request was made. When a customer searches for a product in your store, the resulting URL might look something like this:

```
http://mystore.com/catalogsearch/result/?q=tee+shirt
```

Static URL

A static URL is a fixed address for a specific page. A static URL can be displayed in a search-engine friendly format, or one that references products and categories by ID. Search-engine friendly URLs include words that people might use to look for a product, and are created by enabling Web Server Rewrites.

```
http://mystore.com/accessories/eyewear.html

http://mystore.com/catalog/product/view/id/409/s/
chelsea-tee-409/category/16/
```

URL Key

The URL key is the part of of a static URL that describes the product or category. When you create a product or category, an initial URL key is automatically generated based on the name. The URL key should consist of lowercase characters with hyphens to separate words. A well-designed, "search engine friendly" URL key might include the product name and key words to improve the way it is indexed by search engines. The URL key can be configured to create an automatic redirect if the URL key is changed.

Store Code

The store code can be included in the URL. However, it might cause problems if third-party services, such as PayPal, are configured to work with a URL that does not include the code. By default, the store code is not included in URLs.

HTML Suffix

Your catalog can be configured to either include or exclude the .html suffix as part of category and product URLs. There are various reasons why people might choose to use or to omit the suffix. Some believe that the suffix no longer serves any useful purpose, and that pages without a suffix are indexed more effectively by search engines. However, your company might have a standardized format for URLs, that requires a suffix.

The most important thing to understand is that the suffix is controlled by your system configuration. Never type the suffix directly into the URL key of a category or product. (Doing so will result in a double suffix at the end of the URL.)

Whether you decide to use the suffix or not, be consistent and use the same setting for all your product and category pages. Here are examples of a category URL with, and without, the suffix.

```
http://mystore.com/accessories/eyewear.html

http://mystore.com/accessories/eyewear/retro-chic-eyeglasses
```

Category Path

You can configure the URL to either include or exclude the category path. By default, the category path is included in all category and product pages. The following examples show the same product URL with, and without, the category path.

```
http://mystore.com/accessories/eyewear/retro-chic-eyeglasses

http://mystore.com/retro-chic-eyeglasses
```

To prevent search engines from indexing multiple URLs that lead to the same content, you can exclude the category path from the URL. Another method is to use a canonical meta tag to let search engines know which URLs to index, and which to ignore.

To configure catalog URLs:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Search Engine Optimizations** section. Then, do the following:
   a. Set **Product URL Suffix** to “html” or “htm.” Do not include a period before the suffix.
   b. Set **Category URL Suffix** to “html” or “htm.” Do not include a period before the suffix.
   c. Set the category path to your preference. To omit the category path from product URLs, set **Use Categories Path for Product URLs** to “No.”

Search Engine Optimizations

4. When complete, click the **Save Config** button.
5. After the setting is saved, you will be prompted to refresh the cache. Click the **Cache Management** link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.

To configure search-engine friendly URLs:

1. On the Admin menu, select **System > Configure**. Then in the panel on the left under General, select **Web**.
2. Click to expand the **Search Engine Optimization** section.

Search Engine Optimization

3. Set **Use Web Server Rewrites** to "Yes."
4. When complete, click the **Save Config** button.

To configure the store code for URLs:

1. On the Admin menu, select **System > Configure**. Then in the panel on the left under General, select **Web**.
2. Click to expand the **URL Options** section.
3. Set **Add Store Code** to your preference.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Autogenerated Site Map	Store View	Determines if the Magento site map is implemented in the store. When enabled, a link to the site map appears in the footer. Options include: Enable / Disable.
Popular Search Terms	Store View	Determines if Popular Search Terms is implemented in the store. Options include: Enable / Disable.
Product URL Suffix	Store View	Determines if a suffix, such as html or htm, is applied to product URLs. If used, do not include a period before the suffix, because it is applied automatically.
Category URL Suffix	Store View	Determines if a suffix, such as html or htm, is applied to category URLs. If used, do not include a period before the suffix, because it is applied automatically.
Use Categories Path for Product URLs	Store View	Determines if category paths are included in product URLs. Doing so can cause multiple URLs that lead to the same page. To learn more, see: Canonical Meta Tag.
Create Permanent Redirect for URLs if URL Key Changed	Store View	Determines if a permanent redirect is created automatically whenever a URL key changes. When implemented, the Create Custom Redirect for old URL checkbox that appears below the product URL Key field is selected by default. Options include: Yes / No.
Page Title Separator	Store View	Identifies the character that separates the category name and subcategory in the page title that appears in the browser.
Use Canonical Link Meta Tag for Categories	Store View	If there are multiple URLs that point to the same category page, uses a canonical meta tag to identify the category URL that search engines should index. Options include: Yes / No.
Use Canonical Link Meta Tag for Products	Store View	If there are multiple URLs that point to the same product page, uses a canonical meta tag to identify the product URL that search engines

FIELD	SCOPE	DESCRIPTION
		should index. Options include: Yes / No.
Priority for Duplicated URL Keys	Global	Establishes the course of action to take in the case of a duplicate URL key. Options include: Redirect - Category - Product Redirect - Product - Category Category - Redirect - Product Category - Product - Redirect Product - Redirect - Category Product - Category - Redirect

Dynamic Media URLs

A dynamic media URL is a relative reference to an image or other media asset. When enabled, dynamic media URLs can be used to link directly to assets in media storage, or even on a CDN. For example, you can use the WYSIWYG Editor to insert an image into a product description field. As with all markup tags, the code is enclosed in double curly braces. The format of a dynamic media URL looks like this:

```
{{media url="path/to/image.jpg"}}
```

If you prefer to use a static URL, you can change the configuration setting. If dynamic media URLs are included in your catalog, but later the setting is disabled, each reference in your catalog will appear as a broken link. However, the links can be restored by again enabling dynamic media URLs. Using dynamic media URLs can enhance your catalog, but can also impact the performance of catalog search.

Allow Dynamic Media URLs in Products and Categories

To configure dynamic media URLs:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Catalog, select **Catalog**.
3. In the Frontend section, set **Allow Dynamic Media URLs in Products and Categories** to either "Yes" or "No."
4. Click the **Save Config** button to save the setting.

To use static URLs by default for media files:

By default, images inserted into the catalog from media storage have relative, dynamic URLs. If you prefer to use a static URL, you can change the configuration setting.

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Content Management**.
3. In the WYSIWYG Options section, set **Use Static URLs for Media Content in WYSIWYG for Catalog** to "Yes."
4. Click the **Save Config** button to save the setting.

Enable WYSIWYG Editor

Duplicate URL Key Priority

The Priority for Duplicated URL Keys option determines which URL "wins" if a user chooses a link to an allowed duplicate URL key. For example, if a product and category both have a URL key of shoes, you can choose which URL you prefer the user to see.

Example 1: Valid URLs

Suppose you have the following set of URL keys. All of them are allowed because they're associated with different entity types.

ENTITY TYPE	NAME	URL KEY	SAMPLE URL
Category	shoes	shoes	http://www.example.com/shoes.html
Product	shoes	shoes	http://www.example.com/shoes.html
Custom URL Redirect	shoes	shoes	http://www.example.com/shoes.html

Example 2: Priority Setting

Because all three entities have the same URL, what happens when a store visitor requests http://www.example.com/shoes.html? If no URL key matches your priority setting, Magento continues through the priorities in order, until a match is found. CMS URL keys have the lowest priority.

PRIORITY SETTING	RESULT
Default setting: 1. Redirect 2. Category 3. Product	Custom URL Redirect
1. Category 2. Redirect 3. Product	Shoes Category

To configure URL key priority:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand **Search Engine Optimizations**. Then, set **Priority for Duplicated URL Keys** to one of the following:
   - Redirect-Category-Product
   - Redirect-Product-Category
   - Category-Redirect-Product
   - Category-Product Redirect
   - Product-Redirect-Category
   - Product-Category-Redirect
4. When complete, click the **Save Config** button.
5. When prompted to refresh the cache, click the **Cache Management** link in the message above the workspace. Follow the instructions to refresh the cache.

Canonical Meta Tag

Some search engines penalize websites that have multiple URLs that point to the same content. The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content. Using the canonical meta tag can improve your site ranking and aggregate pageviews. The canonical meta tag is placed in the <head> block of a product or category page. It provides a link to your preferred URL, so search engines will give it greater weight.

Example 1: Category Path Creates Duplicate URLs

For example, if your catalog is configured to include the category path in product URLs, your store will generate multiple URLs that point to the same product page.

```
http://mystore.com/furniture/living-room/microfiber-sofa-sleeper

http://mystore.com/microfiber-sofa-sleeper
```

Example 2: Category Page Full URL

When canonical meta tags for categories are enabled, the category page of your store includes a canonical URL to the full category URL:

```
http://mystore.com/furniture/living-room/microfiber-sofa-sleeper
```

Example 3: Product Page Full URL

When canonical meta tags for products are enabled, the product page includes a canonical URL to the domain-name/product-url-key because product URL keys are globally unique.

```
http://mystore.com/microfiber-sofa-sleeper
```

If you also include the category path in product URLs, the canonical URL remains domain-name/product-url-key. However, the product can also be accessed using its full URL, which includes the category. For example, if the product URL key is microfiber-sofa-sleeper and is assigned to the Furniture > Living-Room category, the product can be accessed using either URL.

You can avoid being penalized by search engines by omitting the category from the URL, or by using the canonical meta tag to direct search engines to index either by product or category. As a best practice, it is recommended that you enable canonical meta tags for both categories and products.

To enable the canonical meta tag:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, select **Catalog.**
3. Click to expand the **Search Engine Optimizations** section.
4. If want search engines to index only pages that have a full category path, do the following:
   a. Set **Use Canonical Link Meta Tag for Categories** to "Yes."
   b. Set **Use Canonical Link Meta Tag for Products** to "No."
5. If you want search engines to index only product pages, do the following:
   a. Set **Use Canonical Link Meta Tag for Products** to "Yes."
   b. Set **Use Canonical Link Meta Tag for Categories** to "No."
6. When complete, click the **Save Config** button.

Chapter 22:

URL Redirects

The URL Redirect tool lets you change any URL that is associated with a product, category, or CMS page. When the redirect goes into effect, any links that point to the previous URL are redirected to the new address.

The terms rewrite and redirect are often used interchangeably, but refer to slightly different processes. A URL rewrite changes the way a URL appears in the browser. A URL redirect, on the other hand, updates the URL that is stored on the server. A URL redirect can be either temporary or permanent. Your store uses URL redirects to make it easy for you to create search engine friendly URLs and to preserve existing links.

Create Custom Redirect for Old URL

Automatic Product Redirects

Your store can be configured to automatically generate a permanent redirect whenever the URL key of a product changes. In the product record, the checkbox below the URL key indicates if permanent redirects are enabled for your catalog. If your store is already configured to automatically redirect catalog URLs, making a redirect is as easy as updating the URL key.

Create Permanent Redirect

To set up automatic redirects:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Search Engine Optimizations** section. Then, set **Create Permanent Redirect for URLs if URL Key Changed** to "Yes."
4. When complete, click the **Save Config** button.

To automatically redirect catalog URLs:

1. On the Admin menu, select **Catalog > Manage Products**.
2. Find the product in the list, and click to open the record.
3. In the **URL Key** field, do the following:
   a. Make sure that the **Create Custom Redirect for old URL** checkbox is selected. If not, complete the instructions to enable automatic redirects.
   b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
4. When complete, click the **Save** button.

5. When prompted to refresh the cache and index, click the links in the messages that appear at the top of the workspace. Follow the instructions.

   The permanent redirect is now in effect for the product and any associated category URLs.

6. To view the redirect records, select **Catalog > URL Redirects**. The most recent custom redirects are at the top of the list.

Creating URL Redirects

The URL Redirect tool can be used to create product and category redirects, and custom redirects for any page in your store. When the redirect goes into effect, any existing links that point to the previous URL are seamlessly redirected to the new address. The following instructions show how to use the URL Redirect tool to create three different kinds of redirects:

- Product Redirect
- Category Redirect
- Custom Redirect

All redirects reference a “Target Path” and “Request Path,” as shown in the following examples. The “Request Path” is the old URL, and the “Target Path” is where you want the URL to go from now on.

Example 1: Permanent 301

FIELD	VALUE
Target Path	`category-1.html`
Request Path	`catalog/category/id/6`
Redirect Type	Permanent 301

Example 2: Temporary 302

FIELD	VALUE
Target Path	`catalog/category/id/6`
Request Path	`product.html` `http://magentocommerce.com`
Redirect Type	Temporary 302

You can use redirects to create additional URLs for items, as a temporary seasonal change, or as a permanent change. Redirects can be created for any valid path, including CMS content pages. Internally, the system references products and category by ID. No matter how often the URL changes, the ID remains the same. Here are some ways you can use URL redirects:

Original URL

```
http://www.example.com/peripherals/ergonomic-keyboard.html
```

Additional Product URL

```
http://www.example.com/best-keyboard.html
```

Additional Category URL

```
http://www.example.com/all-on-sale.html

http://www.example.com/save-now/spring-sale
```

URL Redirect Management

Field Descriptions

FIELD	DESCRIPTION
Type	Indicates the type of redirect to be made. The type cannot be changed after the redirect is created. Options include: Category Product Custom

Request Path	The URL of the page that is to be redirected. Depending on your configuration, the Request Path might include the .html suffix and category. For example:
	`brandname`
	`brand/brandname`

FIELD	DESCRIPTION

	`catalog/category/view/id/56`
	`private-sale-shoes/prima-pump.html`
	`brand/brandname.html`
	A Request Path must be unique, and not have been used previously.If you have made several attempts to redirect the same page, you should delete any unsuccessful redirects and refresh the cache.

Target Path	The URL that points to the destination page. The Target Path can be a different CMS page, or the result of a search.
	To avoid getting a 404 "Page Not Found" error, the path must exactly match what the system expects to find. The following examples are valid target paths:
	`brandname`
	`brand/brandname`
	`catalog/category/view/id/52`
	`catalogsearch/advanced/result/?brand=brandname`
	`http://magentocommerce.com`

Redirect Type	Indicates whether the redirect is temporary or permanent. Options include: No Temporary (302) Permanent (301)
Description	Describes the purpose of the redirect. This field is for reference and is not visible to customers.

Product Redirect

Before you begin, you should know exactly what you want the redirect to accomplish. Just remember— the "Request Path" is the old URL, and the "Target Path" is where you want the URL to go from now on.

Product ID

Process Overview:

Step 1: Get the Product ID of the Target URL

Step 2: Create the Product Redirect

Step 3: Refresh the Index

Step 4: Test the Redirected URL

Step 1: Get the Product ID of the Target URL

1. On the Admin menu, select **Catalog > Manage Products**.
2. Find the product in the list that is the destination of the redirect, and take note of its product ID.

Step 2: Create the Product Redirect

1. On the Admin menu, select **Catalog > URL Redirects**.
2. In the upper-right corner, click the **Add URL Redirect** button.
3. In the Select URL Redirect Type section, set **Type** to "Product."

URL Redirect Type

4. In the list, find the product that you want to redirect, and click to open the record.
5. Scroll down to the bottom of the Select Category tree, and click the **Skip Category Selection** button.
6. In the URL Redirect Information section, do the following:

URL Redirect Information

   a. If you have multiple stores, set **Store** to the specific view where the redirect applies.
   b. In the **Request Path** field, enter the old URL key.

   > To help you enter the correct format, the Target Path initially echoes the Request path URL by product ID. To redirect the product, simply replace the ID in the URL with the ID of the target product.

   c. In the **Target Path** field, replace the old product ID with the one of the product that you want to be the new destination for the URL.
   d. Set **Redirect Type** to one of the following:
      - Temporary (302)
      - Permanent (301)
   e. For your own reference, enter a brief description of the rewrite.
7. When complete, click the **Save** button.

   Your new product redirect now appears at the top of the list of redirects.

New Product Redirect

Step 3: Refresh the Index

1. On the Admin menu, select **System > Index Management**.
2. Select the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to "Reindex Data," and click the **Submit** button.

Step 4: Test the Redirected URL

Test the redirected URL from your store, to make sure that it works correctly.

Category Redirect

Before you begin, you should know exactly where you want the redirect to go. Just remember— the "Request Path" is the old URL, and the "Target Path" is where you want the URL to go from now on.

URL Redirect Management

Process Overview:

Step 1: Get the Category ID of the Target URL

Step 2: Create the Category Redirect

Step 3: Refresh the Index

Step 4: Test the Redirected URL

Step 1: Get the Category ID of the Target URL

1. On the Admin menu, select **Catalog > Categories > Manage Categories**.
2. In the category in the tree, find the target category and click to open the record.
3. Take note of its category ID at the top of the page.

Category ID

Step 2: Create the Category Redirect

1. On the Admin menu, select **Catalog > URL Redirects**.
2. In the upper-right corner, click the **Add URL Redirect** button
3. In the Select URL Redirect Type section, set **Type** to "Category"

Category URL Redirect

4. In the category tree, click to select the category that is being redirected.

Select Category

5. In the URL Rewrite section, do the following:
   a. If you have multiple stores, elect the **Store** where the redirect applies.
   b. In the **Request Path** field, enter the old URL.
   c. In the **Target Path** field, enter the new URL.
   d. Set **Redirect Type** to one of the following:
      - Temporary (302)
      - Permanent (301)
   e. For your own reference, enter a brief description of the rewrite.
6. When complete, click the **Save** button.

URL Redirect Information

Your new category redirect now appears at the top of the list of redirects.

Step 3: Refresh the Index

1. On the Admin menu, select **System > Index Management**.
2. Select the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to “Reindex Data,” and click the **Submit** button.

Step 4: Test the Redirected URL

Test the redirected URL from your store, to make sure that it works correctly. Make sure that the URL you test goes directly to the category, rather than to a subcategory. For example:

```
http://yourstore.com/catalog/category/view/id/56

http://yourstore.com/catalog/category/view/s/my-category/id/56/
```

Custom Redirect

You can use a custom redirect for CMS pages. Before you begin, get the URL keys you will need for the Request Path and Target Path. Just remember— the "Request Path" is the old URL, and the "Target Path" is where you want the URL to go from now on.

New Custom Redirect

Process Overview:

Step 1: Get the Unique Identifier of the Page to be Redirected

Step 2: Create the Custom Redirect

Step 3: Refresh the Index

Step 4: Test the Redirected URL

Step 1: Get the Unique Identifier of the Page to the Redirected

The unique identifier of the page to be redirected might be the relative path to a page in your store, such as: brand/search/result/brandname

Step 2: Create the Custom Redirect

1. On the Admin menu, select **Catalog > URL Redirects**.
2. In the upper-right corner, click the **Add URL Redirect** button.

3. In the Select URL Redirect Type section, set **Type** to "Custom."

Custom URL Redirect

4. In the URL Redirect Information section, do the following:

   a. If you have multiple stores, select the **Store** where the redirect applies.

   b. In the **Request Path** field, enter the unique identifier of the original URL. To redirect any page in your store, enter the relative path to the page. For example: brand/search/result/brandname

   c. In the **Target Path** field, enter a valid URL for the new destination.

   - To redirect to another CMS page in your store, enter the relative path to the page, without a leading forward slash.
   - To redirect to a page on a different site, enter the fully qualified URL of the new destination. For example:

`new-page`	URL key of target page.
`somewhere/new-page`	Relative path to target page, without leading forward slash.
`http://magento.com`	Fully-qualified URL of target page on external website.

   d. Set **Redirect Type** to one of the following:

   - Temporary (302)
   - Permanent (301)

   e. For your own reference, enter a brief **Description** of the rewrite.

URL Redirect Information

5. When complete, click the **Save** button. Your new redirect now appears at the top of the list.

6. When prompted that the cache has become invalid, click the link in the message at the top of the workspace, and follow the instructions to refresh the cache.

Step 3: Refresh the Index

1. On the Admin menu, select **System > Index Management**.
2. Select the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to “Reindex Data,” and click the **Submit** button.

Step 4: Test the Redirected URL

Test the redirected URL from your store to make sure that it works correctly.

Notes

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Chapter 23:

Promotions

In this chapter, you will learn how to use promotions to offer discounts based on a variety of conditions. You can send your best customers a coupon for a discount on a specific product, create a banner that appears only to certain customers, offer free shipping for purchases over a certain amount, and much more. Promotions can be set up in advance, so they spring into action whenever the required conditions are met.

Topics in this chapter:

- Catalog Price Rules
- Shopping Cart Price Rules
- Coupon Codes
- Product Relationship Rules
- Email Reminder Rules
- Customer Segments

Catalog Price Rules

Catalog price rules can be used to selectively put products on sale under certain conditions. Catalog price rules do not use coupon codes, because they are triggered before a product is placed into the shopping cart.

Catalog Rules

Process Overview:

Step 1: Add a New Rule

Step 2: Define the Conditions

Step 3: Define the Actions

Step 4: Add Related Banners

Step 5: Apply the Rule

Step 1: Add a New Rule

1. On the Admin menu, select **Promotions > Catalog Price Rules**.
2. In the upper-right corner, click the **Add New** button.

   The options in the panel on the left include Rule Information, Conditions, Actions, and Related Banners.

Rule Information

3. On the Rule Information page, do the following:

   a. Complete the **Rule Name** and **Description** fields. These fields are for your internal reference only.

   b. Set **Status** to "Active."

   c. Select the **Websites** where the rule will be available.

   d. Select the **Customer Groups** to which this rule applies.

   > To select multiple options, hold down the Ctrl key (PC) or Command key (Mac), and click each option.

   e. Set **From Date** and **To Date** to define the range of dates when the rule will be in effect. If you leave the dates blank, the rule is enabled as soon as the price rule is saved.

   f. Enter a number to establish the **Priority** of this rule in relation to other rules.

Step 2: Define the Conditions

Most of the available conditions are based upon existing attribute values. If you want to apply the rule to all products, leave the conditions blank.

1. In the panel on the left, select **Conditions**. The first rule begins:

```
If ALL of these conditions are TRUE:
```

The statement has two underlined links, which when clicked, display the options for that part of the statement. If you save the condition without making additional selections, the rule will apply to all products.

- Click the **ALL** link, and select "ALL" or "ANY."
- Click the **TRUE** link and select "TRUE" or "FALSE."
- Leave the condition unchanged to apply the rule to all products.

You can create different conditions by changing the combination of these values.

Condition - Line 1

2. Click the **Add** button at the beginning of the next line.

   a. In the list under **Product Attribute**, select the attribute that you want to use as the basis of the condition. For this example, the selected condition is "Attribute Set."

Condition Line 2, Part 1

> For an attribute to appear in the list, it must be configured to be used in promo rule conditions. To learn more, see: Attribute Frontend Properties.

The selected condition appears in the statement, followed by two more underlined links. The statement now says:

```
If ALL of these conditions are TRUE:

Attribute Set is …
```

b. Click the **is** link, and select either "IS" or "IS NOT."

c. Then, click the **...** "more" link, and choose the attribute set upon which the condition is based.

Condition Line 2, Part 3

The selected item appears in the statement to complete the condition.

```
If ALL of these conditions are TRUE:

Attribute Set is Eyewear
```

3. To add another line to the statement, click the **Add** button, and choose one of the following:

- Conditions Combination
- Product Attribute

Then, repeat the process until the condition is complete.

If at any time you want to delete part of the statement, click the **Delete** button at the end of the line.

Step 3: Define the Actions

1. In the panel on the left, select **Actions**.

Actions

2. In the Update Prices Using the Following Conditions section, do the following:

   a. Set **Apply** to one of the following options:

By Percentage of the Original Price	Discounts item by subtracting a percentage from the original price. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
By Fixed Amount	Discounts item by subtracting a fixed amount from original price. For example: Enter 10 in Discount Amount for an updated price that is $10 less than the original price.
To Percentage of the Original Price	Discounts item by defining the final price based on percentage. For example: Enter 10 in Discount Amount for an updated price that is 10% of the original price.
To Fixed Amount	Sets the price to a fixed amount.

   b. Do one of the following:

   - Enter the **Discount Amount**.
   - To apply the discount amount to associated products, set **Enable Discount to Subproducts** to "Yes." Then, enter the **Discount Amount** to apply.

3. If you want to stop the processing of other rules after this rule has been applied, set **Stop Further Rules Processing** to "Yes." This safeguard prevents customers from receiving multiple discounts for the same product.

4. Click the **Save and Continue Edit** button to save your changes.

Step 4: Add Related Banners

1. In the panel on the left, select **Related Banners**.

2. In the list, select the checkbox of each banner that you want to associate with this price rule.

   If your banners don't appear in the table, click the **Reset Filter** button to clear the previous filter rules.

Related Banners

Step 5: Apply the Rule

As new rules are added, the prices and the priorities are recalculated accordingly.

To apply a new rule immediately, do one of the following:

- Click the **Save and Apply** button.
- From the Catalog Price Rules list, click the **Apply Rules** button.

When you create a new price rule, it might take an hour or so for it to become available. Allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

Price Rule with Multiple SKUs

A single price rule can be applied to multiple SKUs, which makes it possible to create a variety of promotions based on a product, brand, or category. In the following illustration, multiple products are selected for a catalog price rule.

Selecting Multiple SKUs for a Price Rule Condition

To apply a price rule to multiple SKUs:

1. On the Admin menu, select **Promotions > Catalog Price Rules**.
2. Do one of the following:
   - Follow the instructions to create a catalog price rule.
   - In the list, click to open the catalog price rule that you want to change.
3. In the panel on the left, select **Conditions**. Then, do the following:
   a. In the first line, set the first parameter to "ANY."

If ANY of these conditions are TRUE

   b. If the price rule doesn't have a line for SKU, Click the **Add** button at the beginning of the next line. Then, in the list under Product Attribute, select **SKU**.

Choose the Condition

c. Click the **...** "more" link to display more options. Then, click the **Chooser** button to display the list of available products.

SKU IS

d. In the list, select the checkbox of each product that you want to include. Then, click the **Select** button to add the SKUs to the condition.

Multiple SKUs Added to Condition

4. Complete the rule, including any Actions to be taken when the conditions are met.

5. To apply the rule, click the **Save Rule** button.

   When you create a new price rule, it might take an hour or so for it to become available. Allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

Shopping Cart Price Rules

Shopping cart price rules create discounts for orders at the checkout level, based on a set of conditions. The discount can be applied automatically when the conditions are met, or be applied when the customer enters a valid coupon code. When applied, the discount appears on the shopping cart page under the subtotal.

Once established, the price rule can be used as needed for a season or promotion by changing its status and date range.

Process Overview:

Step 1: Add a New Rule
Step 2: Define the Conditions
Step 3: Define the Actions
Step 4: Complete the Labels
Step 5: Add Related Banners (Optional)
Step 6: Apply the Rule

Step 1: Add a New Rule

1. On the Admin menu, select **Promotions > Shopping Cart Price Rules**. Then, click the **Add New Rule** button.

Shopping Cart Price Rules

The options in the panel on the left include Rule Information, Conditions, Actions, Labels, and Related Banners.

Shopping Cart Price Rule Settings

2. Under General Information, complete the **Rule Name** and **Description**. These fields are for internal reference only.

3. If you want the rule to go into effect immediately, set **Status** to "Active."

4. To establish the scope of the rule, do the following:

   a. Select the **Websites** where the promotion is to be available.

   b. Select the **Customer Groups** to which the promotion applies.

      To make the promotion available only to registered customers, do not select the "NOT LOGGED IN" option.

      To select multiple options, hold down the Ctrl key (PC) or Command key (Mac), and click each option.

5. To associate a coupon with the price rule, set **Coupon** to "Specific Coupon." Then, do the following:

   a. Enter a numeric **Coupon Code** that the customer must enter to receive the discount.

   b. To set a limit on the number of times the coupon can be used, complete the following:

Uses per Coupon	Determines how many times the coupon code can be used. If there is no limit, leave the field blank.
Uses per Customer	Determines how many times the coupon code can be used by

the same registered customer who belongs to any of the selected customer groups. The setting does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. If there is no limit, leave the field blank.

6. To define the "good through" date range for the promotion, do the following:
   a. Click the **Calendar** button next to the **From Date** field, and choose the first date. The promotion will start at the beginning of that day.
   b. Click the **Calendar** button next to the **To Date** field, and choose the last date. The promotion will stop at the end of that day.
7. Enter a number to determine the **Priority** of this price rule in relation to the Action settings of other price rules that might be active at the same time. (Number 1 has the highest priority.)
8. To apply the rule to published listings in RSS feeds, set **Public In RSS Feed** to "Yes."

Step 2: Define the Conditions

In this step, the conditions are described that must be met for an order to qualify for the promotion. The price rule goes into action whenever the set of conditions is met.

1. In the panel on the left, select **Conditions**. The first rule appears by default, and states:

```
If ALL of these conditions are TRUE:
```

The statement has two underlined links which when clicked, display the selection of options for that part of the statement. You can create different conditions by changing the combination of these values. Do any of the following:

- Click the **ALL** link, and select "ALL" or "ANY."
- Click the **TRUE** link and select "TRUE" or "FALSE."
- Leave the condition unchanged to apply the rule to all products.

Condition - Line 1

2. Click the **Add** button at the beginning of the next line. Then, choose one of the following options from the list to describe the condition that you want to set for the rule.

- Product attribute combination
- Products subselection
- Conditions combination
- Cart Attribute

Condition - Line 2, Part 1

Example 1: Regional Price Rule

To create a regional price rule, select one of the following cart attributes:

- Shipping Postcode
- Shipping Region
- Shipping State/Province
- Shipping Country

Example 2: Shopping Cart Totals

To base the condition on shopping cart totals, select one of the following cart attributes:

- Subtotal
- Total Items Quantity
- Total Weight

When you make a selection, the basic structure of the statement appears in the box with additional links to mark where you can select information. Each underlined word is a building block that describes a different aspect of the condition.

3. In the list under Product Attribute, select the attribute upon which the condition is based. For this example, the selected condition is **Attribute Set**.

Condition - Line 2, Part 1

For an attribute to appear in the list, its Use for Promo Rules Conditions property must be set to "Yes."

The condition appears in the statement, followed by two more underlined links. The statement now says:

Condition - Line 2, Part 2

```
If ALL of these conditions are TRUE:

If an item is FOUND in the cart with ALL of these conditions true

Attribute Set is …
```

4. Click the **is** link, and select either "IS" or "IS NOT" to describe the condition to be met. In this example, the options are "IS" and "IS NOT."

5. Click the **...** "more" link, and choose the attribute set upon which the condition is based. The selected item appears in the statement to complete the condition.

Completed Condition

```
If ALL of these conditions are TRUE:
Attribute Set is Electronics
```

6. If you want to add more conditions, click the **Add** button. Then, choose one of the following:

   - Conditions Combination
   - Product Attribute

   Then, repeat the process until the condition is complete.

   To delete part of the statement, click the **Delete** button at the end of the line.

Step 3: Define the Actions

The shopping cart price rule actions describe how prices are updated when the conditions of the rule are met.

Shopping Cart Price Rule Actions

1. In the panel on the left, select **Actions**. Then, set **Apply** to one of the following discount options:

Percent of product price discount	Discounts item by subtracting a percentage from the original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Fixed amount discount	Discounts item by subtracting a fixed amount from original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is $10 less than the original price.
Fixed amount discount for whole cart	Discounts the entire cart by subtracting a percentage from the cart total. For example: Enter 10 in Discount Amount to subtract 10% from the cart total.
Buy X get Y free	Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)

2. Enter the **Discount Amount** as a number, without symbols. For example, depending on the discount option selected, the number 10 might indicate a percentage, a fixed amount, or a quantity of items.

3. In the **Maximum Qty Discount is Applied To** field, enter the largest number of the same product that can qualify for the discount.

4. For a "Buy X Get Y Free" promotion, in the **Discount Qty Step (Buy X)** field, enter the number of products that must be purchased to receive the number of free products represented by "Y."

5. To include the cost of shipping in the discount, set **Apply to Shipping Amount** to "Yes,"

6. To determine how free shipping is applied, set **Free Shipping** to one of the following:

No	Free shipping is not available for the promotion.
For matching items only	Free shipping is available only for specific items in the cart that match the rule.
For shipment with matching items	Free shipping is available for the entire cart when a coupon that is based on the rule is used.

7. Set **Stop Further Rules Processing** to "Yes" to stop processing other rules as soon as this one is applied. This safeguard prevents customers from receiving multiple discounts for the same purchase.

8. To define an additional action that applies to specific items in the cart, only when a specific set of conditions is met, click the **Add** button. Then, choose an item from the following sections in the list:

   - Cart item attribute
   - Price in cart
   - Quantity in cart
   - Row total in cart
   - Product attribute (from all available in your catalog)

   Add as many levels as you need to describe the conditions to be met.

9. When complete, click the **Save Rule** button.

Step 4: Complete the Labels

The label appears on the order below the subtotal to identify the discount. You can enter a default label for all store views, or enter a different label for each view.

1. In the panel on the left, select **Labels.**

2. In the Default Label section, enter the text for the **Default Rule Label for All Store Views**.

Default Label

3. In the Store View Specific Labels section, enter the label text for each store view. For example, if each store view is in a different language, enter the label translation for each view.

Store View Specific Labels

Step 5: Add Related Banners

Any banners that are associated with the promotion appear in the store when the conditions of the price rule are met.

1. In the panel on the left, select **Related Banners**.
2. In the list, select the checkbox of each banner that you want to associate with the price rule.

Shopping Cart Price Rule - Related Banners

If your banners don't appear in the table, click the **Reset Filter** button to clear the previous filter rules.

Step 6: Apply the Rule

1. When complete, click the **Save Rule** button.
2. When you create a new price rule, it might take an hour or so for it to become available. Allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night. As new rules are added, Magento recalculates the prices and the priorities accordingly.

Field Descriptions

FIELD	DESCRIPTION
Rule Information	
Rule Name	(Required) The name of the rule is for internal reference.
Description	A description of the rule should include the purpose of the rule, and explain how it is used.
Status	(Required) Determines if the rule is currently active in the store. Options include: Active / Inactive
Websites	(Required) Identifies the websites where the rule can be used.
Customer Groups	(Required) Identifies the customer groups where the rule applies.
Coupon	(Required) Indicates if a coupon is associated with the rule. Options include: No Coupon — No coupon is associated with the rule. Specific Coupon — A specific coupon is associated with the rule. Coupon Code — When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion. Use Auto Generation — Select the checkbox to automatically generate multiple coupon codes which can be used with the promotion.
Uses per Coupon	The number of times the coupon code can be used.
Uses per Customer	Determines how many times the coupon code can be used by the same registered customers who belongs to any of the selected customer groups. The setting does not apply to guest shoppers who are members of the NOT LOGGED IN

FIELD	DESCRIPTION
	customer group, or to customers who shop without logging in to their accounts. If there is no limit, leave the field blank.
From Date	The first date in the "good through" time period when the coupon can be used.
To Date	The last date in the "good through" time period when the coupon can be used.
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.
Public in RSS Feed	Determines if the promotion is included in your store's public RSS feed. Options include: Yes / No.
Actions	
Apply	Determines the type of calculation that is applied to the purchase. Options include: Percent of product price discount: Discounts item by subtracting a percentage from the original price. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price. Fixed amount discount: Discounts item by subtracting a fixed amount from original price. For example: Enter 10 in Discount Amount for an updated price that is $10 less than the original price. Fixed amount discount for whole cart: Discounts the entire cart by subtracting a percentage from the cart total. For example: Enter 10 in Discount Amount to subtract 10% from the cart total. Buy X Get Y Free (discount amount is Y): Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)
Discount Amount	(Required) The amount of discount that is offered, entered as a number and without symbols. Depending on the discount option used, the number 10 might denote a percentage, fixed

FIELD	DESCRIPTION
	amount, or quantity.
Maximum Qty Discount is Applied To	Determines the maximum number of products that the discount can be applied to in the same purchase.
Discount Qty Step (Buy X)	In a "Buy X Get Y Free" promotion, determines the number of products that must be purchased to receive "Y" free.
Apply to Shipping Amount	Determines if the discount can be applied to the cost of shipping. Options include: Yes / No.
Free Shipping	Determines if free shipping is included in the promotion, and if so, for which items. Options include: No — Free shipping is not available for orders that qualify for the promotion. For matching items only — Free shipping is available only for items in the cart that qualify for the promotion. For shipment with matching items — Free shipping is available for the entire cart if any item qualifies for the promotion.
Stop Further Rules Processing	Determines if additional promotions can be applied to this purchase. To prevent a single purchase from receiving multiple discounts, select "Yes." Options include: Yes / No
Add Reward Points	Determines the number of reward points earned when the the rule is applied.
Default Label	
Default Rule Label for All Store Views	Enter a default label to identify the discount that can be used for all store views.
Store View Specific Labels	If applicable, enter a different label to identify the discount for each store view.

Coupon Codes

Coupons codes can be associated with shopping cart price rules to apply a discount when a set of conditions is met. For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount.

In-store Coupon for Mobile Users

Here are a few ways that you can use coupons in your store:

- Email coupons to customers
- Produce printed coupons
- Create in-store coupons for mobile users

Coupon codes can be sent by email, or included in newsletters, catalogs, and advertisements. You can even create in-store coupons with a quick response code that shoppers can scan with their smart phones. The QR code links to a page on your site with more information about the promotion.

To apply the coupon to a purchase, the customer enters the coupon code during checkout from the shopping cart page of your site, or possibly at the cash register of your "brick and mortar" store.

Enter Coupon Code in Shopping Cart

To set up a coupon code:

1. Follow the instructions to create a shopping cart price rule.
2. On the General Information page, do the following:
   a. Set **Coupon** to "Specific Coupon."
   b. Enter a numeric **Coupon Code** to be used with the promotion. If you want to auto-generate coupon codes, select the **Use Auto Generation** checkbox.
   c. To limit the number of times the coupon can be used, complete the following:
      - Uses per Coupon
      - Uses per Customer

      If you leave these fields blank, there will be no limit on the number of times the coupon can be used.
   d. To make the coupon valid for a limited period of time, complete the **From Date** and **To Date** fields. To select the date, click the **Calendar** button next to each field.

      If you leave the date range empty, the rule will never expire.

Price Rule Coupon Code Settings

3. Follow the standard instructions to complete the shopping cart price rule.

Auto-Generated Coupon Codes

Batches of discount coupon codes can be formatted and generated automatically. Coupon codes can also be exported, and incorporated into other applications. For example, you might use a series of auto-generated coupon codes to produce printed coupons with unique codes.

Generated Coupon Codes

To configure auto-generated codes:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left under Customers, select **Promotions**. Then, click to expand the **Auto Generated Specific Coupon Codes** section.

Auto Generated Specific Coupon Codes

3. To create a specific format for your codes, enter the following:
   - Code Length
   - Code Format
   - Code Prefix
   - Code Suffix
   - Dash Every X Characters
4. When complete, click the **Save Config** button.

   These settings can be overridden from the Shopping Cart Price Rule page.

To generate a batch of coupon codes:

1. On the Admin menu, select **Promotions > Shopping Cart Price Rules**.
2. Select an existing rule, or create a new one.
3. Set **Coupon** to "Specific Coupon." Then, do the following:
   a. Select the **Use Auto Generation** checkbox.
   b. Complete the other rule settings as needed.

   > **Important!** Shopping cart price rules with auto-generated coupon codes cannot be used in automated email reminders. If a shopping cart price rule for a "Specific Coupon" is used in an automated email reminder, it is automatically unassigned when the rule is saved.

4. Click the **Save and Continue Editing** button.
5. In the panel on the left, select **Manage Coupon Codes**. Then, do the following:

a. In the **Coupon Qty** field, enter the number of codes to be generated.

b. Adjust the code format settings, as needed.

c. Click the **Generate** button.

The generated coupon codes appear in the list, with the number of times each has been used.

To delete coupon codes:

1. In the list, select the checkbox of each code that you want to delete.
2. Set the **Actions** control to "Delete."
3. Click the **Submit** button. When prompted, click **OK** to confirm.

To export coupon codes:

1. In the list of generated codes, use the filter controls at the top of each column to display the codes that you want to export.
2. Set **Export to** to the file format that you want to use for the data file.
3. Click the **Export** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Code Length	Global	Defines the length of the coupon code, excluding the prefix, suffix and separators.
Code Format	Global	Defines the coupon code format. Options include: Alphanumeric — Any combination of letters and numbers. Alphabetical — Letters only. Numeric — Numbers only.
Code Prefix	Global	A value that is appended to the beginning of all coupon codes. If you do not want to use a prefix, leave the field blank.

FIELD	SCOPE	DESCRIPTION
Code Suffix	Global	A value that is appended to the end of all codes. If you do not want to use a suffix, leave the field blank.
Dash Every X Characters	Global	An interval where a dash (-) can be inserted into all coupon codes. If you do not want to use a dash, leave the field blank. Coupon codes that differ by only a dash are considered to be different codes.

Coupon Report

To learn how your coupons are being used, you can run a detailed coupon usage report for each website, store, or view.

To generate a coupon report:

1. On the Admin menu, select **Reports > Sales > Coupons**.
2. In the upper-right corner, set **Show Report For** to define the scope of the report.
3. Set the filters as needed. Then, do one of the following:
   - To include coupon codes from all price rules in the report, set **Shopping Cart Price Rule** to "Any."
   - To include coupon codes related to specific rules, set **Shopping Cart Price Rule** to "Specified." Then, select the rules that you want to include in the report.
4. When complete, click the **Show Report** button.

Coupon Usage Report

Free Shipping Promotion

Free shipping can be offered as a promotion, either with, or without a coupon. A free shipping coupon, or voucher, can also be applied to customer pick-up orders, so the order can be invoiced and "shipped" to complete the workflow.

Some shipping carrier configurations give you the ability of offer free shipping based on a minimum order. To expand upon this basic capability, you can use shopping cart price rules to create complex conditions based on multiple product attributes, cart contents, and customer groups.

Process Overview:

Step 1: Enable Free Shipping

Step 2: Create the Shopping Cart Price Rule

Step 3: Test the Rule

Step 1: Enable Free Shipping

1. Enable the Free Shipping method in the configuration of your store.
2. Complete the free shipping settings for any carrier service that you want to use for free shipping.

Step 2: Create the Shopping Cart Price Rule

1. On the Admin menu, select **Promotions > Shopping Cart Price Rules**.
2. Follow the steps below to set up the free shipping promotion that you want to offer.
3. When complete, click the **Save Rule** button.

When you create a new price rule, it might take an hour or so for it to become available. Allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

Free Shipping for Any Order

1. Complete the **General Information** settings as follows:
   a. Enter a **Rule Name** for internal reference.
   b. Set **Status** to "Active."
   c. Set **Website** to "Main Website." (Click to make sure the entry is selected.)
   d. Select the **Customer Groups** to which the rule applies.
   e. Do one of the following:
   - To offer a free shipping promotion without a coupon, accept the default, "No Coupon" setting.
   - To use a coupon with the price rule, set **Coupon** to "Specific Coupon." If necessary, complete the instructions to set up a coupon.
2. In the panel on the left, select **Actions**. Then, do the following:
   a. Set **Apply** to "Percent of product price discount."
   b. Set **Apply to Shipping Amount** to "Yes."
   c. Set **Free Shipping** to "For shipment with matching items."

Price Rule Action

3. In the panel on the left, select **Labels**. Then, do one of the following:

- Enter a **Default Rule Label for All Store Views**. This label is visible to the customer.
- If your store is available in multiple stores, enter a label for each view, as needed.

4. When complete, click the **Save Rule** button.

Free Shipping for Orders Over $Amount

1. Complete the **General Information** settings as follows:
   a. Enter a **Rule Name** for internal reference.
   b. Set **Status** to "Active."
   c. Set **Website** to "Main Website." (Click to make sure the entry is selected.)
   d. Select the **Customer Groups** to which the rule applies.
   e. Do one of the following:
   - To offer a free shipping promotion without a coupon, accept the default, "No Coupon" setting.
   - To use a coupon with the price rule, set **Coupon** to "Specific Coupon." If necessary, follow the instructions to set up a coupon.
2. In the panel on the left, select **Conditions**.
3. Click the **Add** button to insert a condition. Then, do the following:
   a. In the list under Cart Attribute, click **Subtotal**.
   b. Click the **is** link, and select "equals or greater than."
   c. Click the **...** "more" link, and enter a threshold value for the Subtotal, such as 100, to complete the condition.
4. In the panel on the left, select **Actions**. Then, do the following:
   a. Set **Apply** to "Percent of product price discount."
   b. Set **Apply to Shipping Amount** to "Yes."
   c. Set **Free Shipping** to "For shipment with matching items."
5. In the panel on the left, select **Labels**. Then, do one of the following:

- Enter a **Default Rule Label for All Store Views**. The label is visible to the customer during checkout.
- If your store is available in multiple views, enter a label for each view, as needed.

6. When complete, click the **Save Rule** button.

Step 3: Test the Rule

When you create a new price rule, it might take an hour or so for it to become available.

Allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

Buy X Get Y Free

This example shows how to set up a shopping cart price rule for a "Buy X, Get Y Free" promotion. The format of the discount is as follows:

```
Buy X quantity of product, get Y quantity for free.
```

Process Overview:

Step 1: Create a Shopping Cart Price Rule

Step 2: Define the Conditions

Step 3: Define the Actions

Step 4: Complete the Label

Step 5: Add Related Banners

Step 6: Apply the Rule

Step 1: Create a Shopping Cart Price Rule

Complete Step 1 of the shopping cart price rule instructions to create a shopping cart rule with the general information.

Step 2: Define the Conditions

Complete Step 2 of the shopping cart instructions to define the conditions for the price rule. The conditions can be triggered by purchasing a specific product, making a purchase of a certain amount, or any other scenario.

Step 3: Define the Actions

1. In the panel on the left, select **Actions**. Then, do the following:

Buy X Get Y Free

a. Set **Apply** to "Buy X get Y free (discount amount is Y)."

b. Set **Discount Amount** to 1. This is the quantity the customer will receive for free.

c. In the **Discount Qty Step (Buy X)** field, enter the quantity that the customer must purchase to qualify for the discount.

2. Click the **Save and Continue Edit** button. Then, complete the rest of the rule as needed.

Step 4: Complete the Label

Complete Step 4 of the shopping cart price rule instructions to enter the label that appears during checkout.

Step 5: Add Related Banners

Complete Step 5 of the shopping cart price rule instructions to associate an existing banner with the shopping cart rule.

Step 6: Apply the Rule

When complete, click the **Save Rule** button.

When you create a new price rule, it might take an hour or so for it to become available. Allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

Discount with Minimum Purchase

Shopping cart price rules can be used to offer a percentage discount based on a minimum purchase. In the following example, a 25% discount is applied to all purchases over $200.00 in a specific category. The format of the discount is as follows:

```
X% off all Y (category) over $Z dollars
```

Process Overview:

Step 1: Create a Shopping Cart Rule

Step 2: Define the Conditions

Step 3: Define the Actions

Step 1: Create a Shopping Cart Rule

Follow the steps to create a shopping cart rule.

Step 2: Define the Conditions

1. In the panel on the left, select **Conditions**.
2. Click the **Add** button at the beginning of the next line, and select **Product Attribute Combination**.

Product Attribute Combination

3. Click the **Add** button at the beginning of the next line.

If an Item is FOUND

4. In the list under Product Attribute, click **Category**.

Choose Condition to Add

a. Click the **...** "more" link to display additional options.

Category IS

b. Click the **Chooser** button to display the available categories. Then in the category tree, select the checkbox of each category that you want to include.

Category Tree

c. Click the **Select** button at the end of the line to add the categories to the condition.

Category Condition

5. Click the **Add** button at the beginning of the next line, and do the following:

a. In the list under Product Attribute, select **Price**.

b. Click the first underlined option, **is**. Then in the list, select "equals or greater than."

Price Equals or Greater Than

c. Click the **...** "more" link to display the price field. Then, enter the amount that the price must be to meet the condition. For example, enter 200.00.

Enter the Price to Complete the Condition

6. Click the **Save and Continue Edit** button.

Step 3: Define the Actions

1. In the panel on the left, select **Actions**. Then, do the following:

Actions

a. Set **Apply** to "Percent of product price discount."

b. Enter the **Discount Amount**. For example, enter 25 for twenty-five percent.

c. If you want to prevent the purchase from qualifying for additional promotions, set **Stop Further Rules Processing** to "Yes."

2. Click the **Save and Continue Edit** button. Then, complete the rule as needed.

Product Relationship Rules

Product rules give you the ability to target the selection of products that are presented to customers as related products, up-sells, and cross-sells. Each product rule can be associated with a customer segment to produce a dynamic display of targeted merchandising.

The process is similar to setting up a price rule. First, you define the conditions to match, and then choose the products you want to display. At any given time, there might be a number of active rules that can be triggered to display related products, up-sells, and cross-sells. The priority of each rule determines the order in which the block of products appears on the page.

Manage Product Rules

To create a product relationship rule:

1. On the Admin menu, select **Catalog > Rule-Based Product Relations**.
2. In the upper-right corner, click the **Add Rule** button.

General Rule Information

3. Complete the General Information as described in the field descriptions below.

4. In the panel on the left, select **Products to Match**. Then, build the condition as you would for a catalog price rule.

Match Condition

5. In the panel on the left, select **Products to Display**. Then, build the results condition as you would for a catalog price rule.

   a. To base the result on a price relationship with the matched product, under Product Special, select **Price (percentage)**.

Special Price Percentage

   b. Complete the condition to describe the products that you want to include in the results. In this example, the matching products must have a higher value than the original product.

Results Condition

6. When complete, click the **Save** button.

Field Descriptions

FIELD	DESCRIPTION
Rule Name	A name that identifies the rule for internal use.
Priority	Determines the sequence in which the results of the rule appear when displayed with other sets of results that target the same place on the page. The value can be set to any whole number, with the highest priority of 1. For example, if there are multiple up-sell rules that apply, the one with the highest priority appears before the others. The sort order of the products within each set of results is random. Any up-sell, cross-sell, and related products that were manually configured always appear on the page before any rule-based product promotions.
Status	Controls the active status of the rule. Options include: Active / Inactive
Apply To	Identifies the type of product relationship that is associated with the rule. Options include: Related Products Up-sells Cross-sells
From Date	If the rule is active for a range of time, determines the first date the rule is active.
To Date	If the rule is active for a range of time, determines the last date the rule is active.
Result Limit	Determines the number of products that appear in the results at one time. The maximum number is 20. If more matching results are found, the products rotate through the block each time the page is refreshed.
Customer Segments	Identifies the customer segments to which the rule applies. Options include: All / Specified

Email Reminder Rules

Automated reminder email rules give you the ability to send email reminders to customers when a specific set of conditions is met. For example, you might send email reminders to customers who have added something to their shopping cart or wishlist, but have not yet made a purchase.

Email reminders can be triggered after a certain number of days have passed since a cart was abandoned, or for any other condition you want to define, such as total cart value, quantity, items in cart, and so on.

You can use email reminders to encourage customers to return to your store, and include a coupon code as an incentive. Coupon codes can be automatically generated for each batch of email reminders, to give you control over the offers that are associated with each batch.

Email Reminder Rules

Email Reminder Setup

Email reminder rules can be configured to be sent at regular intervals by the minute, hour, or day.

> **Important!** For automated email reminders to be sent as configured, the crontab service (for UNIX/BSD/Linux) or the Scheduled Tasks service (for Windows) should be configured to run the necessary script periodically. For more information, see: How to Set Up a Cron Job.

To configure email reminders:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Promotions**.
3. Click to expand the **Automated Email Reminder Rules** section. Then, complete the section as shown in the field descriptions below.

Automated Email Reminder Rules

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable Reminder Emails	Global	Enables automated email reminders. If this is set to No, the following values will be ignored. Options include: Yes / No
Frequency	Global	Indicates the frequency with which Magento should check for new customers who qualify for the automated email reminders. Options include:

FIELD	SCOPE	DESCRIPTION	
		Minute Intervals	Sends the email according to the selected interval. Options include: 5 minutes 10 minutes 15 minutes 20 minutes 30 minutes
		Hourly	Sends email hourly, at the minute after the hour specified. Enter a value between 0-59.
		Daily	Sends email daily, from t he Start Time.
Start Time	Global	The day, minute, and second the email is sent. Specified in 24-hour format, based on the system time on your server.	
Maximum Emails per One Run	Global	Limits the number of emails sent in a scheduled block.	
Email Send Failure Threshold	Global	The number of times the reminder attempts to send out notifications to specific email address and fails. When the value is set to 0, there is no threshold, and notifications will keep being sent despite any failures.	
Reminder Email Sender	Store View	The store contact shown as the sender of the email.	

Creating Email Reminder Rules

Before setting up an automated email reminder rule, make sure that you have a shopping cart price rule set up that defines the promotion that is being offered. Rule conditions can be based on shopping cart properties, wishlist properties, or both.

- Wishlist trigger conditions include: the number of days abandoned, sharing, number of items, and specific items in the wishlist.
- Shopping cart trigger conditions include: the number of days abandoned, if a specific coupon code has been applied, line items quantity, items quantity, total, if items are virtual, and specific items in the shopping cart.

To create an email reminder rule:

1. On the Admin menu, select **Promotions > Automated Email Reminder Rules**.
2. In the upper-right corner, click the **Add New Rule** button.

General Information

3. Complete the General Information, as shown in the field descriptions section below.
4. In the panel on the left, select **Conditions**. The process is similar to building a catalog price rule. Do the following:

Conditions

a. Click the **Add** button to display the list of options. Then, choose one of the following conditions to apply:

- Wishlist
- Shopping Cart

b. Complete the condition to describe the scenario that triggers the reminder email.

Completed Condition

5. In the panel on the left, select **Emails and Labels**. Then, do the following:

Email Templates

a. Assign an email template to each store to which you have access. Then, select the email reminder template to use for each.

If you don't want to send this rule's reminder email to customers of a store, leave the value, "Not Selected."

b. Enter the **Rule Title** to be used as the default for all stores. The value can be incorporated into email templates by using the promotion_name variable.

c. Enter the **Rule Description**, which is the default for all stores The value can be incorporated into email templates by using the promotion_description variable.

6. When complete, click the **Save** button.

Field Descriptions

FIELD	DESCRIPTION
Rule Name	The name of the automated reminder rule identifies the rule internally.
Description	A description of the rule for internal reference.
Shopping Cart Price Rule	The shopping cart rule that is associated with this email reminder. Reminder emails can promote a shopping cart price rule with or without coupon. If a shopping cart price rule includes an auto-generated coupon, the reminder rule will generate a random, unique coupon code for each customer.
Assigned to Website	The websites to receive automated reminder emails based on this rule.
Status	Activates the rule. If status is inactive, then all other settings will be ignore and the rule will not be triggered. Options include: Active / Inactive
From Date	The starting date for this automated reminder rule. If no date is specified, the rule becomes active immediately.
To Date	The ending date for this automated reminder rule. If no date is specified, the rule becomes active indefinitely.
Repeat Schedule	The number of days before the rule is triggered, and the reminder email sent again, provided the conditions are met. To trigger the rule more than once, enter the number of days before the next email blast, separated by a comma. For example, enter "7" to have the rule triggered again seven days later; enter "7,14" to have the rule triggered in seven days, and again fourteen days later.

Email Reminder Templates

The default email reminder template can be customized, and additional templates created. To learn more, see: Customizing Email Templates.

To create a template for email reminders:

1. On the Admin menu, select **System > Transactional Emails**.
2. Click the **Add New Template** button.
3. Select the default email template, **Rule Reminder**. Then, click the **Load Template** button.

Email Reminder Template

4. Assign a new **Template Name**, and follow the standard instructions to customize the template. The following variables are specific to email reminders, and can be incorporated into the message:

```
promotion_name

promotion_description

coupon.getCode()

coupon.getUsageLimit()

coupon.getUsagePerCustomer()
```

The information in these variables is determined by the automated email reminder rule that you set up, and by the shopping cart price rule that is associated with the coupon.

5. When complete, click the **Save Template** button.

Customer Segments

Customer segments allow you to dynamically display content and promotions to specific customers, based on properties such as customer address, order history, shopping cart contents, and so on. You can optimize marketing initiatives based on targeted segments by using shopping cart price rules and banners. You can also generate reports and export the list of targeted customers.

Because customer segment information is dynamic and is constantly refreshed, customers can become associated and disassociated from a segment as they shop in your store.

Additional Resources

3 Segmentation Tactics to Ignite Conversion

Manage Segments

Customer Segment Attributes

Customer segments are defined in a manner similar to shopping cart and catalog price rules. For an attribute to be used in a customer segment condition, the Use for Customer Segment Conditions property must be set to "Yes." Customer segment conditions can incorporate the following attributes:

Customer Address

You can define any of the address fields, such as city or country. Any address in a customer's address book can match these conditions for the customer to match. Or, you can specify that only the default billing or shipping addresses can be used to match a customer. Customer address attributes are available only for customers who are logged in to their accounts.

Customer

Miscellaneous customer information can be defined, including Customer Group, name, email, newsletter subscription status, and Store Credit balance. Customer information is available only for customers who are logged in to their accounts.

Shopping Cart

Shopping cart properties can be based on either quantity (line items or total quantity) or the value (grand total, tax, gift card, etc.) of the cart contents.

Products

You can reference products that are currently in the shopping cart or wishlist, or that have previously been viewed or ordered. You can also set a date range for when this occurred. The products are defined using product attributes.

Sales

Order characteristics for past orders can be defined based on the billing/shipping address in the order, the total or average amount or quantity of the orders, or the total number of orders. You can also set a date range for when this occurred, and the order status of the orders that match these conditions. Available only for customers who are logged in. Conditions that are set for shoppers who are not logged in stop working when they log in.

Creating a Customer Segment

The process of creating a customer segment is similar to building a shopping cart price rule, except that the options also include customer-specific attributes.

Process Overview:

Step 1: Complete the General Setup

Step 2: Describe the Conditions

Step 3: Generate the List of Matched Customers

Step 1: Complete the General Setup

1. On the Admin menu, select **Customers > Customer Segments**.
2. In the upper-right corner, click the **Add Segment** button.
3. Complete the **General Properties** as described in the following field description section.
4. When complete, click the **Save and Continue Edit** button.

General Properties

Step 2: Describe the Conditions

1. In the panel on the left, click the **Conditions** tab.

Conditions

2. To create a condition that targets the Millennium Generation, do the following:

   a. Click the **Add** button to display the list of conditions. Then, in the list under Customers, select **Date of Birth**.

   b. Click the **is** link, and select "equals or greater than."

   c. Replace the inserted date with the following: "1977/01/01."

   d. On the next line, click the **Add** button. Then again, in the list under Customers, select **Date of Birth**.

   e. Click the **is** link, and select "equals or less than."

   f. Replace the inserted date with the following: "1994/12/31."

Condition for Millennium Generation

3. Click the **Save and Continue Edit** button.

Step 3: Generate the List of Matched Customers

1. In the panel on the left, select **Matched Customers** to generate a list of customers who match the condition.

Millennium Generation Customer Segment

2. When complete, click the **Save** button.

This customer segment can now be used for targeting promotions, content, and mailings.

Field Descriptions

FIELD	DESCRIPTION
Segment Name	A name that identifies the segment for internal reference.
Description	A brief description that explains the purpose of the segment for internal reference.
Assigned to Website	The single website where the segment can be used.

FIELD	DESCRIPTION
Status	Activates and deactivates the segment. Any associated price rules and banners are deactivated when the segment is disabled. Options include: Active / Inactive.
Apply to	Defines the customer types to which the segment is applied. The selection influences the set of conditions available for creating the segment. The setting cannot be changed after the segment is saved. Options include: Visitors and Registered Customers — Includes all shoppers, regardless of whether they are logged in to an account. Registered Customers — Includes only shoppers who are logged in to an account Visitors — Includes only shoppers who are not logged in to an account.

Target Customer Segments with Price Rules

A customer segment can be targeted by associating it with a shopping cart price rule and banner.

To associate a segment with a shopping cart price rule:

1. On the Admin menu, select **Promotions > Shopping Cart Price Rules**.
2. Do one of the following:
   - In the upper-right corner, click the **Add New Rule** button.
   - Open an existing rule in edit mode.
3. In the panel on the left, select **Conditions**. Then, complete the condition as follows:
   a. Click the **Add** button to display the list of conditions. Then in the list, select **Customer Segments**.
   b. To target a specific segment, click the **...** "more" link to display additional options. Then, click the **Chooser** icon to display the list of customer segments.
   c. In the list, select the checkmark of each segment that you want to target in the condition.

Choose Customer Segments

4. Click the **Select** button to place the selected customer segments into the condition.

Completed Condition

5. Complete the rest of the price rule, as needed.

6. When complete, click the **Save** button.

Target Customer Segments with Banners

A banner can target a specific customer segment, and be incorporated into a shopping cart price rule. Because customer segments are dynamic, the price rule can adjust to changes in customer activity.

Banner

To associate a customer segment with a banner:

1. On the Admin menu, select **CMS > Banners**. Then, do one of the following:
   - In the upper-right corner, click the **Add Banner** button.
   - Open an existing banner in edit mode.
2. Set **Specified from the Customer Segments** to "Specified." Then in the list, select each customer segment that you want to target with the banner.

Customer Segments

3. Make any other changes to the banner, as needed.
4. When complete, click the **Save Banner** button.

Chapter 24:

Shopping Tools

Your store includes a set of shopping tools that create opportunities for your customers to engage with your store, and to share the experience with friends.

Topics in this chapter:

- Opportunities to Engage
- Email a Friend
- Polls
- Tags
- Wishlists
- Product Relationships
- Compare Products
- Recently Viewed / Compared Products
- Product Reviews

Additional Resources

Customer Engagement

The 3 Components of Building eCommerce Customer Loyalty

Opportunities to Engage

Email a Friend

The Email a Friend link makes it easy for your customers to share links to products with their friends.

Polls

The Poll block displays a series of polls or surveys that you can use to learn more about your customers.

Tags

Tags help customers organize and remember the products that they have seen, offer quick navigation, and help search engines index your store.

Wishlist

The Wishlist block displays the items from the customer's wishlist.

Product Relationships

Products in your catalog can be promoted on other pages as Up-sells, Cross-sells, and Related Products.

Compare Products

The Compare Products block lets your customers quickly compare the features of one product with another.

Recently Viewed / Compared

The Recently Viewed and Recently Compared blocks usually appear in the right sidebar of a catalog page.

Product Reviews

Product reviews help build a sense of community, and are considered to be more credible than any advertising money can buy.

Email a Friend

The Email a Friend link makes it easy for your customers to share links to products with their friends. In the Magento demo store, the Email a Friend link appears as an envelope icon.

The automated message that is sent from your store is referred to as **transactional email**[1]. The message template can be customized for your voice and brand. To prevent spamming, customers can send only five messages per hour.

Email a Friend

To send email to a friend:

1. On a catalog page, click the **Email a Friend** link. When prompted, either log into your customer account or register to open an account.
2. Complete the **Message** and enter the recipient **Name** and **Email Address**.

   To send the message to more than one person, click the **Add Another Recipient** link and complete the information for each person.
3. When ready to send the message, click the **Send Email** button.

[1] A notification email sent to the customer when a transaction is processed.

Email to a Friend Form

Polls

Polls make it easy to learn about your customers' opinions and preferences. The poll occupies a small amount of space and is usually placed in the right sidebar of a catalog page. Poll results appear immediately after a response is submitted. If you create multiple polls, a new poll appears each time the page is refreshed.

Original Poll and Results

To create a poll:

1. On the Admin menu, select **CMS > Polls**.
2. In the upper-right corner of the Poll Manager, click the **Add New Poll** button.
3. In the Poll Information section, do the following:

Poll Information

   a. Enter the **Poll Question**.
   b. By default, **Status i**s set to "Open." If you later want to remove the poll from your store, set **Status** to "Closed."
   c. Set **Visible In** to the store view where you want the poll to appear.
4. In the panel on the left, select **Poll Answers**. Then, for each answer, do the following:
   a. Click the **Add New Answer** button. Then, do the following:

Assigned Answers

   b. In the **Answer Title** field, enter the answer as you want it to appear in the poll.
   c. To weight an answer, enter a number in the **Votes Count** field. The number will increment each time a customer chooses the answer.
5. Click the **Save Poll** button to save your poll.

To prevent multiple voting:

You can protect the poll results by preventing people from voting multiple times from the same computer.

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Web**.

3. Click to expand the **Polls** section, and set **Disallow Voting in a Poll Multiple Times from Same IP Address** to "Yes."

Disallow Voting Multiple Times

4. When complete, click the **Save Config** button.

To edit a poll:

1. From the Poll Manager list, click to open the poll in edit mode. Then, make the necessary changes.
   - To close the poll so that it no longer appears in the store, set **Status** to "Closed."
   - To see the vote count for each answer, click **Poll Answers** in the panel on the left.
2. When complete, click the **Save Poll** button.

Poll Answer Count

Tags

Tags are one-word descriptors that are used as keywords for your catalog. Tags can be assigned to products by registered customers who are logged in, and also by guests. Tags help customers organize and remember the products that they have seen, offer quick navigation, and help search engines index your store.

Popular Tags

Tags are formatted as a tag cloud, and typically appear in the Popular tags block in the right sidebar of catalog pages. The size of the text indicates the popularity of the tag. Each product page has an "Tag this Product" section at the bottom of the page, where shoppers can enter their own tags. As an incentive, customers can earn reward points for adding tags to a product. Tags that customers have assigned to a product appear on the Customers Tagged Product tab in the product record, and includes the tag, the customer name, and email address.

To add a tag from the store:

1. From any product page, scroll down to **Tag this Product** at the bottom of the page.

Tag this Product

2. In the **Add a Tag** text box, type the tag you want to associate with the product.
   - To enter multiple tags, separate each with a blank space.
   - To enter a phrase, enclose the text in single quotes.
3. Click the **Add Tags** button.

   The tag will be submitted for review and published on the site when approved.

Products Tagged by Administrators

There's no reason to wait for customers to tag products. As part of your SEO effort, you can tag products with high-value keywords as part of your SEO effort. As the store administrator, you can apply new tags to products, and reuse existing tags.

Products Tagged by Administrators

To add a new tag:

1. On the Admin menu, select **Catalog >Tags > All Tags**.
2. In the upper-right corner, click the **Add New Tag** button. Then, do the following:
   a. Enter the **Tag Name**.
   b. Set **Status** to "Approved."
   c. In the **Base Popularity** field, enter a numeric value to assign a weight to the tag. The number assigns a base value to the tag and increases its size in the tag cloud.
3. When complete, click the **Save Tag** button.

To apply an existing tag to specific products:

1. In the Manage Tags list, click to open the tag.
2. Click to expand the **Products Tagged by Administrators** section. Then, do the following:
   a. Click the **Reset Filter** button to display all product records.
   b. Select the checkbox of each product that you want to tag.
3. When complete, click the **Save Tag** button.

   The products now appear in the list of Products Tagged by Administrators.

Moderating Tags

After a customer submits a product tag, an administrator must approve the tag before it becomes visible in the store. After a tag has been approved, it can be used for other products without further approval.

Changing the Status of Pending Tags

Tag Activity

The remaining sections give you a snapshot of the tag activity, including which customers have used the tag, and products tagged by the store administrator and customers.

Customers Submitted this Tag

You can jump to a specific customer or product by clicking its row in the list.

Products Tagged by Customers

To approve multiple tags:

1. On the Admin menu, select **Catalog >Tags > Pending Tags**. Then in the list, click to open a pending tag.
2. In the list, select the checkbox of each tag that you want to approve.
3. Set the **Actions** control to “Change Status.” Then, set the **Status** control to “Approved.”
4. When complete, click the **Submit** button.

To manage a single tag:

1. On the Admin menu, select **Catalog >Tags > Pending Tags**. Then in the list, click to open a pending tag.

Editing a Tag

2. If necessary, you can edit the text as needed. Then, do one of the following:
   - To approve and publish the pending tag, set **Status** to "Approved."
   - To reject the tag, set **Status** to "Disapproved."
3. When complete, click the **Save Tag** button.

Wishlists

A wishlist is a list of products that registered customers can share with friends or transfer to their shopping carts at a later date. When wishlists are enabled, the Add to Wishlist link appears on the category and product pages of your store.

Customers can maintain multiple wishlists, which allows them to:

- Make each wishlist private or public
- Move items between wishlists
- Search for public wishlists of other customers, and purchase items

Depending on the theme, the Add to Wishlist might be a text link or a graphic image. In the Magento demo store, the link is represented by a heart image. Registered customers can click the Add to Wishlist link, add the product to the wishlist, and share it with friends. Wishlists increase customer loyalty and bring new people to your store.

Add to Wishlist Link on Product Page

Shared wishlists are sent from a store email address, but the body of the message contains a personalized note from the customer. You can customize the email template that is used for the notification message when wishlists are shared, and choose the store contact that appears as the sender.

Each wishlist can be maintained in the customer's account dashboard, where it can be updated, and used to add products to the shopping cart. When a product with multiple options is added to a wishlist, any options selected by the customer are included in the wishlist item description. For example, if the customer adds the same pair of shoes, but in three different colors, each pair appears as a separate wishlist item. On the other hand, if

the customer adds the same product to the wishlist multiple times, the product appears in the wishlist only once, but with an updated quantity that reflects the number of times the product was added. Customers can update their wishlists from their account dashboard. However, merchants can also update a customer's wishlist from the Admin.

Wishlist Setup

If enabled in your store configuration, customers can maintain multiple wishlists.

General Options

To configure wishlists:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Customers, select **Wishlist**.
3. Click to expand the **General Options** section. Then, do the following:
4. Verify that **Enabled** is set to "Yes."
5. To give customers the ability to maintain multiple wishlists, do the following:
   a. Set **Enable Multiple Wishlists** to "Yes."
   b. Enter the **Number of Multiple Wishlists** that each customer can maintain.

   > If you use multiple wishlists, and later disable the feature, only the default wishlist remains available to customers. However, the data from any previous multiple wishlists remains accessible from the store Admin.

6. Click to expand the **Share Options** section, and do the following:

Share Options

   a. Set **Email Template** to the template to be used for the notification that is sent when a customer shares a wishlist.
   b. Set **Email Sender** to the store contact that appears as the sender of the notification.

7. When complete, click **Save Config**.

Wishlist Search Widget

All Wishlists that are set to be public can be found using the Wishlist Search widget. The widget enables a customer to search by Wishlist owner name or email address. Store customers can find wishlists that belong to other customers, view them and order products from them, or add the products to their own wishlists. When items from a customer's public wishlist are purchased by another customer, the items are not removed from the original wishlist.

> Shipping addresses are not included in wishlists.

The Wishlist Search widget can be added to any page of your store to make it easy for customers to search for wishlists. To learn more, see: Widgets.

To add a Wishlist Search widget:

1. On the Admin menu, select **CMS > Widgets**.
2. In the upper-right corner, click the **Add New Widget Instance** button. Then, in the Settings section, do the following:

Settings

   a. Set **Type** to "Wishlist Search."
   b. Set **Design Package/Theme** to the theme of the store where the wishlist will be added. Then, click the **Continue** button.

3. In the panel on the left, select **Widget Options**. Then, do the following:

Widget Options

4. Set **Quick Search Form Types** to one of the following:

All Forms	Gives customers the option to search by all available parameters.
Wishlist Owner Name Search	Gives customers the option to search for wishlists by owner name.
Wishlist Owner Email Search	Gives customers the option to search for wishlists by owner email address.

5. Configure the remaining widget properties as needed, following the standard instructions.
6. When complete, click the **Save** button.

Wishlist Reports

A customer Wishlist report includes the following information for each wishlist the customer has created:

- The date when a product was added
- The customer name
- The wishlist name and status (public or private)
- The product name and SKU
- Customer comments
- Quantity of the product in the Wishlist, quantity currently available in the store, and the difference between these two values.

You can choose to see a report for the entire website or for an individual store view. The scope is selected in the Show Report For field. The report can be exported to .csv or Excel .xml format.

To generate a wishlist report:

On the Admin menu, select **Reports > Customers > Customers Wishlist**.

Product Relationships

Products in your catalog can be promoted on other pages by defining the nature of the relationship between the products. The options available are: Up-sell products, Related products, and Cross-sell products.

Related Products

Related products are meant to be purchased in addition to the item the customer is viewing. They complement, enhance, or add optional features to the product.

Up-sells

Up-sell products are items that are similar, but are perhaps of a higher-quality, more popular, or have a better profit margin than the item the customer is considering.

Cross-sells

Cross-sell products are offered on the shopping cart page as last-minute purchases before the checkout process begins.

Compare Products

The Compare Products block usually appears in the far right column, or sidebar of the category page, and provides a detailed, side-by-side comparison of two or more products. You can customize the report to include additional attributes or remove ones that you don't want to include. In the Magento demo store, the Add to Compare link is represented by an icon, rather than a link.

Compare Products

To compare products:

1. From your storefront, find the products that you want to compare, and click the **Add to Compare** link for each.
2. In the Compare Products block in the right sidebar, click the **Compare** button. The Compare Products report opens in a new window.
3. To clear the Compare Products list, click the **Clear All** link.

COMPARE PRODUCTS

Print This Page

	SULLIVAN SPORT COAT	LINEN BLAZER	STRETCH COTTON BLAZER
	$510.00	★★★★★ $455.00	$490.00
	ADD TO CART	ADD TO CART	ADD TO CART
DESCRIPTION	Two button, single vented, notched lapels. Three buttons at cuff. Interior buttoned welt pockets. Full polyester lining. 100% wool. Dry clean.	Single vented, notched lapels. Flap pockets. Tonal stitching. Fully lined. Linen. Dry clean.	Two button, single vented, notched lapels. Slim cut through the shoulders chest and waist. Flap pockets, welt inside chest pockets. Cotton/lycra. Dry clean.
SHORT DESCRIPTION	This modern, slim-fit sport jacket is crafted from ultralight refined wool and tailored to a two-button silhouete. Corresponding trousers form a spring-season suit that you can wear whereever.	In airy lightweight linen, this blazer is classic tailoring with a warm weather twist.	Sleek and modern, our form flattering blazer carries a slightly relaxed, yet structured shape. Timeless in any time zone.
SKU	msj00gc	msj012c	msj015c
COLOR	No	No	No
	$510.00	$455.00	$490.00
	ADD TO CART	ADD TO CART	ADD TO CART

CLOSE WINDOW

Compare Products Report

Recently Viewed/Compared Products

The Recently Viewed and Recently Compared blocks usually appear in the right sidebar of a catalog page. The number of products listed can be set for each website, store, or view.

Recently Viewed

To configure Recently Viewed/Compared Products:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**.
3. Click to expand the **Recently Viewed/Compared Products** section. Then, do the following:

Recently Viewed/Compared Products

   a. Set **Show for Current** to the website, store, or view where the configuration applies.
   b. In the **Default Recently Viewed Products Count** field, enter the number of recently viewed products you want to include.
   c. In the **Default Recently Compared Products Count**, enter the number of recently compared products you want to include.
4. When complete, click the **Save Config** button.

Product Reviews

Product reviews help to build a sense of community, and are considered more credible than any advertising money can buy. In fact, some search engines give sites with product reviews a higher ranking than those without. For those who find your site by searching for a specific product, a product review is essentially the landing page of your store. Product reviews help people find your store, keep them engaged, and often lead to sales.

Add Your Review

Writing Reviews

Customers can write reviews for any product in your catalog. Reviews can be written from the product page by clicking the “Add Your Review” link. For products that haven't been reviewed, the link says, “Be the first to review this product.”

The number of stars indicates the satisfaction rating. Visitors can click the link to read the reviews and write their own. As an incentive, customers can receive reward points for submitting a review.

Writing a Product Review

Moderating Reviews

When a review is submitted, it is sent to the Admin for moderation. When approved, the review is published in your store.

To edit and approve customer reviews:

1. On the Admin menu, select **Catalog > Reviews and Ratings > Customer Reviews > Pending Reviews**.

Pending Reviews

2. In the list, click a pending review to view the details, and edit if necessary.
3. To approve a pending review, change the **Status** from "Pending" to "Approved." To reject a review, select "Not Approved."
4. When complete, click the **Save Review** button.

Custom Ratings

By default, customer can rate the quality, price, and value of a product. In addition, you can add your own custom ratings that relate to your products and customers. The average rating for each product appears in catalog lists and on the product page.

Manage Ratings

To create your own ratings:

1. On the Admin menu, select **Catalog > Reviews and Ratings > Manage Ratings**.
2. In the upper-right corner, click the **Add New Rating** button.
3. In the Rating Title section, enter the **Default Value** for the new rating. Then, enter the translation for each language supported by your store.

Rating Title

4. In the Rating Visibility section, set **Visibility In** to the store view where the rating will be used. (Hold down the Ctrl key to select multiple options.)
5. In the **Sort Order** field, enter a number to determine the sequence that this rating appears in the list of ratings.

Rating Visibility

6. When complete, click the **Save Rating** button.

Order by SKU

Both customers and store administrators can add products to shopping carts and orders by specifying SKU numbers. Customers can use the Order by SKU widget, or order by SKU from their accounts.

Order by SKU Widget

To order by SKU from the store:

1. In the Order by SKU block, enter the **SKU** number and **Qty** you want to order.
2. To add another item, click the **Add Row** button.
3. Click the **Add to Cart** button.

Notes

Chapter 25:

Gift Options

At checkout, customers are presented with the available gift options during the Shipping Method step of the process. If the customer chooses to add gift options, two groups of checkboxes appear: Gift Options for Entire Order and Gift Options for Individual Items. If enabled, the Send Gift Receipt and Add Printed Card checkboxes appear below. Prices for the selected gift wrapping options and the printed card are shown as individual lines in the order totals during Order Review.

Gift Options During Checkout

Gift-Related Products & Services

Magento offers a variety of gift-related products and services. Some can be applied to an individual item or to the entire order. An additional charge can be added to include a printed card or gift wrapping.

Gift Wrapping

Gift wrapping can be applied to an entire order, or for specific items in the order during checkout. The price for gift wrapping an individual item is set in the product record.

Gift Messages

A gift message or printed card can be added to the entire order or to specific items in the order during checkout.

Gift Receipt

During checkout, a gift receipt can be included in the order by selecting the Include Gift Receipt checkbox.

Gift Cards

A gift card is a product that you can offer for sale from your catalog. The gift card can be physical, virtual, or a combination of the two. Each gift card has a value assigned, with a unique code that is entered during checkout. Each gift card has an associated account to keep track of the balance.

Gift Registries

Your customers can create gift registries for special occasions, and invite friends and family to participate. When items are purchased from the gift registry, the inventory is updated.

Gift Options Workflow

Entire Order

When the customer selects the Gift Options for the Entire Order checkbox, the Gift Wrapping Design and the Gift Message options appear below. The customer can select a gift wrapping design and write a gift message for the entire order. After the gift wrapping design is selected, its price and an image preview, if available, appear.

Individual Items

When the customer selects the Gift Options for Individual Items checkbox, the list of product names appears with the Gift Wrapping Design options for each product. To learn more, see: Product Gift Options.

Send Gift Receipt

The customer can select the Send Gift Receipt checkbox to send a gift receipt for the order

Add Printed Card

If the customer selects the Add Printed Card checkbox, the card price appears below.

Gift Options Setup

The Gift Options configuration determines if customers have the option to add a gift message and gift wrap during checkout. The gift options must be configured first for the website, and can then be overridden at the product level.

Gift Options Configuration

To enable gift options:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Sales**.
2. Click to expand the **Gift Options** section. Then, do the following:
   a. Set the following options according to your preference:
      - Allow Gift Messages on Order Level
      - Allow Gift Messages for Order Items
      - Allow Gift Wrapping on Order Level
      - Allow Gift Wrapping for Order Items
      - Allow Gift Receipt
      - Allow Printed Card
   b. If applicable, enter the **Default Price for Printed Card**.
3. When complete, click the **Save Config** button.

   When gift wrapping is enabled, the gift wrapping-related settings become available at the product level.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Allow Gift Messages on Order Level	Website	Specify whether a gift message can be added for the entire order.
Allow Gift Messages on Order Items	Website	Specify whether a gift message can be added for an individual order item.
Allow Gift Wrapping on Order Level	Website	Specify whether gift wrapping can be selected for the entire order.
Allow Gift Wrapping on Order Items	Website	Specify whether gift wrapping can be selected for an individual order item.
Allow Gift Receipt	Website	Specify whether a person creating the order can choose to send a gift receipt (that is, a shipping document where the prices and totals are not shown) instead of the general shipping document.
Allow Printed Card	Website	Specify whether a printed card can be added to the order.
Default Price for Printed Card	Website	The default price for the card (it is displayed when the card is selected during the order creation).

Gift Options Tax

Because you can charge customers for gift wrapping and printed cards, you can also specify a tax class for these items, at either the global or website level. Gift wrapping and printed gift card prices can be configured to include or exclude tax, or to display both options.

Orders, Invoices, Credit Memos Display Settings

To assign a tax class to gift options:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Tax**.
2. Click to expand the **Tax Classes** section.
3. Set **Tax Class for Gift Option** to the applicable tax class.
4. When complete, click the **Save Config** button.

To configure gift option taxes:

1. On the Admin menu, select **System > Configuration**. In the panel on the left, under Sales, select **Tax**.
2. Click to expand the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following:
   a. Set **Display Gift Wrapping Prices** to one of the following:
      - Excluding Tax
      - Including Tax
      - Including and Excluding Tax
   b. Set **Display Printed Gift Card Prices** to one of the following:
      - Excluding Tax
      - Including Tax
      - Including and Excluding Tax
3. When complete, click the **Save Config** button.

Gift Message Module

The Gift Wrapping module is connected with the Gift Message module. If the Gift Message module is disabled, then the Gift Wrapping module is disabled too. This means the Gift Options tab will be missing on the product page and the order page, and the Gift Wrapping page will not be available in Sales Management. The Add Gift Options check box will not be available during checkout.

To turn off the Gift Message module:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Advanced, select **Advanced**.
3. Click to expand the **Disabled Modules Output** section.
4. Find the **Mage_GiftMessage** module in the list, and change its status to "Disable."
5. When complete, click the **Save Config** button.

Gift Wrap

Gift wrapping is available for any product that can be shipped. Gift wrapping can be offered for individual items or for the entire order. You can charge a separate price for each gift wrap design, and upload a thumbnail image of the design that appears during checkout.

Gift Wrapping Design at Checkout

To add new gift wrap designs:

1. On the Admin menu, select **Sales > Gift Wrapping**.

Manage Gift Wrapping

2. In the upper-right corner, click the **Add Gift Wrapping** button. Then, do the following:

New Gift Wrapping

   a. Enter a name for the **Gift Wrapping Design** that will appears with the option during checkout.

   b. Select the **Websites** where the gift wrap design will be available.

   c. Set **Status** to "Enabled."

   d. Enter the **Price** of the gift wrap design.

   e. To upload a thumbnail **Image** of the gift wrapping, click the **Choose File** button. Then, select the image file and click the **Upload File** button.

3. When complete, click the **Save** button.

To delete gift wrap designs:

Method 1: Delete Single Gift Wrap Design

1. Open the gift wrapping design in edit mode.

2. Click the **Delete** button. When prompted, click **OK** to confirm.

Method 2: Delete Multiple Gift Wrap Designs

1. On the Manage Gift Wrapping page, select the checkbox of each gift wrap design that you want to delete.
2. Set the **Actions** control to "Delete."
3. Click the **Submit** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Gift Wrapping Design	Store View	The name of the gift wrap option that appears to customers during checkout. The name can be different for each store view.
Websites		Select the websites where the new gift wrap will be available.
Status	Global	Determines if gift wrapping is available. Options include: Enabled / Disabled.
Price	Global	Specifies the price of the gift wrap option. This setting can be overridden by the gift wrap price set at the product level.
Image	Global	Uploads a thumbnail image of the gift wrap design that appears next to the gift wrap option.

Chapter 26:

Gift Registries

Magento Enterprise Edition gives your customers the ability to create gift registries for special occasions and to notify their friends and family. Friends and family can purchase items from the gift registry, and Magento keeps track of all items purchased and the quantities remaining.

Customers can create gift registries and share them with others. A gift registry owner can add products to the registry from the customer dashboard. In addition, products can be transferred from the wishlist or shopping cart. The store administrator can view and share customer gift registries, add items from the customer's shopping cart, update gift registry item quantities, or delete a gift registry.

Gift Registry Workflow

Gift Registry Setup

Enables the gift registry, and sets up the registry types and attributes.

Customer / Gift Registry Owner

Creates the gift registry for an upcoming occasion. Adds items to the registry, and shares it with friends and family.

Gift Registry Recipient

Receives email notification, and clicks the link to visit the gift registry. Then, places an order for an item in the gift registry.

Magento

Updates gift registry item counts, and notifies the gift registry owner.

Using a Gift Registry

The gift registry is included with other useful quick links. In the demo store, the quick links are in the footer of the store, but the exact position varies by theme. In addition, the Widget tool can be used to place a gift registry quick search box anywhere in your store.

Gift Registry Search

To access a gift registry, recipients can click the link in the email they receive, or search by the recipient's name, email, or gift registry ID. Recipients who want to purchase a product can add the item from the gift registry directly to their shopping carts. When the order is placed, the gift registry is updated to reflect the purchase.

Wedding Gift Registry

Gift Registry Setup

Before you can offer gift registries to your customers, you must enable gift registries and configure the related email notifications. Magento sends the following email notifications in response to events in the gift registry workflow.

- To the gift registry owner upon successful creation of the gift registry. Email contains a link to the newly created gift registry that can be shared with friends and family
- Optionally, if the gift registry owner wishes to send notifications from the store, to the friends and family (gift registry recipients) of the gift registry owner. Email contains a link to the gift registry.
- To the gift registry owner when updates are made to the gift registry. Email indicates that items have been purchased but does not specify by whom.

Magento has predefined templates for each of these emails that can be modified and customized as any other email template.

Process Overview:

Step 1: Enable Gift Registries

Step 2: Configure Email Notifications

Step 1: Enable Gift Registries

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Gift Registry**
3. Click to expand the **General Options** section, and do the following:

General Options

   a. Set **Enable Gift Registry** to "Yes."

   b. In the **Max Recipients Limit** field, enter the maximum number of people that can be invited to any registry.

4. When complete, click the **Save Config** button.
5. When prompted to update the cache, click the link in the message at the top of the workspace and follow the instructions.

   After the cache is refreshed, Gift Registry appears in the Customers menu, and becomes available to customer accounts.

Step 2: Configure Email Notifications

1. Click to expand the **Owner Notification** section, and do the following:

Owner Notification

   a. Select the **Email Template** that is used to notify gift registry owners that their registries have been created.

   b. Select the store identity that appears as the **Email Sender** of the message.

2. Click to expand the **Gift Registry Sharing** section, and do the following:

Gift Registry Sharing

   a. Select the **Email Template** that is used to notify gift registry recipients that a registry has been shared with them.

   b. Select the store identify that appears as the **Email Sender** of the message.

   c. Max Emails Allowed to be Sent at One Time

3. Click to expand the **Gift Registry Update** section, and do the following:

Gift Registry Update

   a. Select the **Email Template** that is used to notify gift registry owners of changes to the gift registry.

   b. Select the store identify that appears as the **Email Sender** of the message.

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
General Options		
Enable Gift Registry	Store View	Determines if gift registries are available. Yes — Enables gift registries for the selected store view.The Gift Registry tab appears in the account dashboard of registered customers. No — Gift registries are not available for the store view.
Max Recipients Limit	Store View	Sets the number of recipients that a customer can add to a gift registry. The customer shares the gift registry with each recipient. In the storefront, the Add Recipient button is to customers available until the Max Recipients Limit is reached.
Owner Notification		
Email Template	Store View	Identifies the template used for the Owner Notification email that is sent when a gift registry is created.
Email Sender	Store View	Identifies the store identity that appears as the sender of the Owner Notification email.
Gift Registry Sharing		
Email Template		Identifies the template used for the Gift Registry Sharing email that is sent when a gift registry is created. When the owner clicks the Share Gift Registry button, the email is sent to each recipient.
Email Sender	Store View	Identifies the store identity that appears as the sender of the Gift Registry Sharing email.
Max Emails Allowed to be Sent at One Time	Store View	The maximum number of Gift Registry Sharing email notification messages that can be sent at one time.

FIELD	SCOPE	DESCRIPTION
Gift Registry Update		
Email Template	Store View	Identifies the template used for the Gift Registry Update email that is sent to the gift registry owner when a purchase is made from the gift registry. The update includes information about the item and quantity purchased, but does not include the name of the person who placed the order.
Email Sender	Store View	Identifies the store identity that appears as the sender of the Gift Registry Update email.

Creating Gift Registries

The gift registry type is the special event that is associated with the gift registry. It can be a wedding, birthday, anniversary, new baby, or any other special occasion. By default, Magento provides gift registry types for the following special events:

- Baby Registry
- Birthday
- Wedding

Each gift registry type consists of a number of attributes, which are the data entry fields that a customer completes to create a gift registry. The attributes can be used to provide additional information about the gift registry owner, the event, time and location, or any other information that relates to the gift registry. Depending on the input type, some attributes have multiple options. For example, the gift registry type “Wedding,” has the attribute “Role,” with the options, “Bride,” “Groom,” and “Partner.” To learn more about attributes and input types, see: Managing Attributes.

Process Overview:

Step 1: Set Up the Gift Registry Type

Step 2: Define the Gift Registry Attributes

Step 1: Set Up the Gift Registry Type

1. On the Admin menu, select **Customers > Gift Registry**.

Gift Registry Types

2. In the upper-right corner, click the **Add Gift Registry Type** button.
3. Under General Information, complete the following:

General Information

a. Enter a unique **Code** to identify the gift registry internally. The code must begin with a lowercase letter. The rest of the code can be any combination of lowercase letters (a-z), numbers (0-9), and underscore (_).

b. In the **Label** field, enter a name for the gift registry, as you want it to appear in the store.

c. In the **Sort Order** field, enter a number to determine the sequence in which this gift registry appears when listed with other gift registries that are available in the store.

d. To activate the gift registry, set **Is Listed** to "Yes."

Step 2: Define the Gift Registry Attributes

1. In the panel on the left, click **Attributes**.

Attributes

2. In the panel on the left, click **Attributes**. Then, click the **Add Attribute** button.
3. To add a predefined static attribute, do the following:

a. Set **Input Type** to one of the following:

- Event Date
- Event Country
- Event Location
- Role

b. In the **Label** field, enter a name for the gift registry, as you want it to appear in the store.

c. In the **Sort Order** field, enter a number to determine the sequence in which this gift registry appears when listed with other gift registries that are available in the store.

4. Assign a unique **Code** to identify the gift registry type internally. The first character should be a lowercase letter. The rest of the code can include lowercase letters(a-z), numbers (0-9) and the underscore (_) character to separate words.

5. Set **Input Type** to the type of data and input control you want to use.

6. For attributes of either the Role or Select input type, click the **Add New Option** button and do the following:

Add New Option

a. Enter a unique **Code** to identify the option

b. Enter a **Label** to identify the data entry field in the store.

c. To preset to the field to a specific value, select the **Is Default** option.

d. Repeat this process for each new option.

7. Select the **Attribute Group** where you want the field to appear in the gift registry.

a. Enter the **Label** that you want to appear next to the field in the store..

b. To require that a value is entered, set **Is Required** to "Yes."

c. In the **Sort Order** field, enter a number to determine the sequence in which this attribute appears when listed with other attributes in the gift registry.

8. When complete, click the **Save** button.

Field Descriptions

ATTRIBUTE	DESCRIPTION
General Information	
Code	A unique name to identify the gift registry type internally. The first character of the code must be a lowercase letter. The rest of the code can be any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).
Label	The name of the gift registry type that appears in the store.
Sort Order	Determines the sequence in which this gift registry type appears when listed with other types.
Is Listed	Determines if the gift registry type is available to customers in the store. Options include: Yes / No.
Attributes	
Code	A unique name to identify the attribute internally.The code can include any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).
Input Type	Determines the type of data and input control that is associated with the attribute, according to type. Options include: **Custom Types** Text — Displays the attribute as a text field. Select — Displays the attribute as a drop-down list. Date — Displays the attribute as a date field. Country — Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No. **Static Types** Event Date — Determines how the date attribute is used in the store. Options include:

ATTRIBUTE	DESCRIPTION		
		Searchable	Determines if the attribute is available for Advanced Search. Options include: Yes / No.
		Is Listed	Determines if the event is included in the list of events that is available in the store. Options include: Yes / No.
		Date Format	Determines the format of the event date. Options include: Short (3/23/2014) Medium (Mar 23, 1914) Long (March 23, 1914) Full (Sunday, March 23, 2014)
	Event Country	Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No.	
	Event Location	The location of the event that is related to the gift registry.	
	Role	The role that identifies who the gift is for. For example, "Bride," "Groom," or "Partner."	
Attribute Group	Select the group where the attribute is listed in the gift registry. Options Include:		
	Event Information	Groups all gift registry attributes that add the information about the gift registry event, its time, place, etc.	
	Gift Registry Properties	Combines all attributes that add information directly about the gift registry.	
	Privacy Settings	Lists the attributes that add information about the gift registry event privacy.	
	Recipients	Groups the attributes that provide	

ATTRIBUTE	DESCRIPTION
	Information information about the person who creates a gift registry.
Label	The name that identifies the attribute in the customer's account dashboard.
Is Required	Indicates if the attributes is a required entry. The gift registry cannot be saved until all required attributes are complete. Options include: Yes / No.
Sort Order	Determines the sequence in which attribute appears when listed with other attributes.

Gift Registry Search Widget

The Widget tool can be used to place a gift registry quick search box anywhere in your store. You can specify which search options are available to customers, including: name, email address, and gift registry ID.

Gift Registry Search Widget

After clicking the Search button, the customer is provided with the search results on the Gift Registry Search page. If the search returns no results, the customer can try searching again by using the search options on the page. To learn more, see: Widgets.

To add a gift registry search widget:

1. On the Admin menu, select **CMS > Widgets**. Then in the upper-right corner, click the **Add New Widget Instance** button.
2. In the Settings section, do the following:

Widget Settings

a. Set **Type** to "Gift Registry Search."

b. Set **Design Package/Theme** to the theme that is used by the store.

c. Click the **Continue** button.

3. In the Frontend Properties section, do the following:

Frontend Properties

a. In the **Widget Instance Title** field, enter a name to identify the widget internally.

b. Set Assign to **Store Views** to the store views where you want the widget to be available.

c. Set **Sort Order** to the sequence in which this widget appears when it appears in the same location as other widgets.

4. In the Layout Updates section below, click the **Add Layout Update** button. To specify where the Gift Registry Search appears in the store, do the following:

Layout Updates

a. Set **Display On** to the pages in your store where you want the widget to appear.

b. If applicable, select the **Categories** where you want the widget to appear.

c. Set **Block Reference** to the page layout block where you want to place the widget.

5. In the panel on the left, select **Widget Options**. To specify how visitors to your site can search for gift registries, select as many of the following that apply:
   - All Forms
   - Recipient Name Search
   - Recipient Email Search
   - Gift Registry ID Search

Widget Options

6. When complete, click the **Save** button.
7. When prompted to refresh the page cache, click the link in the message at the top of the workspace and follow the instructions.

Field Descriptions

FIELD	DESCRIPTION
Settings	
Type	Identifies "Gift Registry Search" as the widget type.
Design Package/Theme	The theme that is used by the store where the widget is to be used.
Frontend Properties	
Widget Instance Title	The name of the widget to be used for internal reference.
Assign to Store Views	Identifies the store views where the widget is to be available.
Sort Order	Order in which widget should appear, relative to other elements in the block in which it appears.
Layout Updates	
Display On	Indicate the specific pages or the types of pages on which the gift registry search widget should appear.
Categories	If applicable, identifies the category pages where the widget will appear.
Block Reference	Indicates the page layout block where the widget will be

FIELD	DESCRIPTION
	placed. The options vary by template and theme.
Widget Options	
Quick Search Form Types	Specifies the parameters that are included in the gift registry quick search box. Options include: All Forms Recipient Name Search Recipient Email Search Gift Registry ID Search

Chapter 27:

Rewards & Loyalty

The Magento Reward Points System gives you the ability to implement unique programs that enhance user experience and increase customer loyalty. You can set up points to be awarded based on a wide range of transaction and customer activities. and control the point allotment, balance, and expiration. Customers can redeem points toward purchases, based on the conversion rate that you establish between reward points and currency. Here are a few examples:

Shopping Cart Price Rules

Points can be rewarded to customers on the basis of a shopping cart rule. They can be rewarded as the only action of the price rule, or in conjunction with a discount.

Customer Balance

Reward Points balances can be managed by admin users per customer. If enabled in the storefront, customers can also view the details of their points balance.

Redeeming Points

Points can be redeemed by admin users and (if enabled) customers during the checkout process. In the Payment Method section, a Use my Reward Points checkbox appears above the enabled payment methods. The available points and monetary exchange rate is included. If the available balance is greater than the order grand total, no additional payment methods is required. The amount of reward points applied to the order appears with the order totals, subtracted from the grand total, similar to a store credit or gift cards. If reward points are used in conjunction with store credit or a gift card, the reward points are deducted first, and the store credit or gift card is deducted if the order total is greater than the redeemable amount of reward points.

Refunding to Reward Points

Orders placed with reward points can be refunded to the reward points balance up to the amount redeemed in the order. On the New Credit Memo page, the amount of points to be applied to the customer's balance can be entered. By default, the field contains the full amount of points that were used in the order.

Reward Point Setup

The Reward Point configuration settings define the basic operating parameters, including the lifetime, cap limits, and the presentation of reward points in the store.

Reward Points Configuration

Process Overview:

Step 1: Configure the Reward Points

Step 2: Configure Points Earned for Customer Activities

Step 3: Complete the Email Notification Settings

Step 1: Configure the Reward Points

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Customers, select **Reward Points**.
2. Click to expand the **Reward Points** section.
3. Complete the fields as follows:

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable Reward Points Functionality	Global	Activates or deactivates reward points. Options include: Yes / No.
Enable Reward Points Functionality on Frontend	Website	If this functionality is enabled, customers can earn points through their activities, and redeem them at checkout. If disabled, only admin users can assign and redeem points on behalf of customers. Options include: Yes / No.
Customers may see Reward Points History	Website	If enabled, customers will be able to see a detailed history of each accrual, redemption, and expiration of Reward Points in the My Account interface.
Minimum Reward Points Balance to Be Able to Redeem	Website	Requires customers to achieve a minimum point balance before they are able to redeem them on orders. If left blank, there will be no minimum limit.
Cap Reward Points Balance At	Website	Prevents customers from accruing more than this maximum points balance. If left blank, there will be no maximum limit.
Reward Points Expire in (days)	Website	Sets a limit in which customers must redeem Reward Points before they expire. Each batch of points which are earned during separate activities will have a separate expiration, and the expiration limit will display for each batch in the Reward Points history in the frontend (if enabled) and admin. If left blank, there will be no expiration limit.
Reward Points Expiry Calculation	Website	Selecting Static defines the date of expiration at the time when the points are earned based on the expiration limit defined above. If the expiration limit is changed, the expiration date for existing points will not change. Selecting Dynamic does not define a date of expiration. Instead, points will periodically be checked for expiration. This allows for the editing of the expiration limit to affect existing points.

FIELD	SCOPE	DESCRIPTION
Refund Reward Points Automatically	Global	To refund reward points automatically, select "Yes." Options include: Yes / No
Deduct Reward Points from Refund Amount Automatically	Global	To deduct reward points from the refund amount automatically, select "Yes." Options include: Yes / No.
Landing Page	Store View	Specifies the CMS page that is used to display more information to customers about Reward Points. A link to the default Rewards page appears at the locations where points can be earned.

Step 2: Configure Points Earned for Customer Activities

In the Acquiring Reward Points by Customers section, the amount of Reward Points earned for various customer activities is defined. If points are assigned for any of these activities, a message appears in the corresponding section of the store to let customers know how many points can be earned by completing the action. Points related to Shopping Cart Price Rules are discussed later.

Actions for Acquiring Reward Points by Customers

1. Click to expand the **Acquiring Reward Points by Customers** section.
2. Complete the fields as follows:

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Purchase	Website	Defines the amount of points earned for placing an order.
Registration	Website	Defines the amount of points earned when a customer registers.
Newsletter Signup	Website	Defines the amount of points earned when a customer signs up for the newsletter. This is not available for guests who sign up for the newsletter. Additionally, if a customer unsubscribes, and subscribes again, they will not receive points a second time.
Converting Invitation to Customer	Website	Defines the amount of points earned for the inviter when an invitation has been accepted by the invitee, resulting in the creation of a new customer account.
Invitation to Customer Conversions Quantity Limit	Website	Limits the number of invitation conversions that can be used to earn points per inviter. If left blank, there will be no maximum limit.
Converting Invitation to Order	Website	Defines the amount of points earned for the inviter when an invitee has accepted the invitation and placed an initial order.
Invitation to Order Conversions Quantity Limit	Website	Limits the number of order conversions that can be used to earn points per inviter. If left blank, there will be no maximum limit.
Invitation Conversion to Order Reward	Website	Indicates how often a customer can earn reward points when invitees make purchases. Options include:

FIELD	SCOPE	DESCRIPTION	
		First	The customer will receive reward points only for the first invoiced order placed by the invitee-customer. Even if more than one invitee registered and placed orders, only the amount of the first order will be converted to reward points and granted to the customer.
		Each	The customer will receive reward points for each invoiced order placed by the invitee-customer. Reward points will be given according to the reward point exchange rates set for the required combination of a website and a customer group.
Review Submission	Website	Defines the amount of points earned when a review has been submitted and approved by an admin user.	
Rewarded Reviews Submission Quantity Limit	Website	Limits the number of reviews that can be used to earn points per customer. If left blank, there will be no maximum limit.	
New Tag Submission	Website	Defines the amount of points earned when a tag has been submitted and approved by an admin user.	
Rewarded Tag Submission Quantity Limit	Website	Limits the number of tags that can be used to earn points per customer. If left blank, there will be no maximum limit.	

Step 3: Complete the Email Notification Settings

The Email Notification Settings section identifies the store identity that appears as the sender of automated email messages that are sent to notify customers of balance updates and upcoming reward point expiration dates.

Email Notification Settings

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Email Sender	Store View	Determines the sender of both the balance update and expiration notification emails.
Subscribe Customers by default	Global	Determines the default subscription status of customers for both balance update and expiration notifications emails.
Balance Update Email	Store View	Determines the template of the email that customers receive when there is an update to their points balance.
Reward Points Expiry Warning Email	Store View	Determines the template of the email that customers receive when the expiration warning limit has been reached for a batch of points.
Expiry Warning before (days)	Global	Defines the number of days prior to the expiration of point at which the expiration notification will be sent. If left blank, or if the warning limit is greater than the expiration limit (defined in the section above), no expiration notifications will be sent.

Reward Exchange Rates

Reward Exchange Rates determine the amount of points that are earned based on the order amount, as well as the amount of monetary credit that is available when points are redeemed.

Manage Reward Exchange Rates

Different exchange rates can be applied to different websites and different customer groups. If multiple exchange rates from different websites and customer groups apply to the same customer, the following rules of priority apply:

PRIORITY	DESCRIPTION
1	Applies to specific website and specific customer group.
2	Applies to all websites and a specific customer group.
3	Applies to a specific website and all customer groups.
4	Applies to all websites and all customer groups.

When converting currency to points, the amount of points cannot be divided. Any currency remainder is rounded down. For example, if $2.00 converts to 10 points, points will be earned in groups of $2.00. Therefore, a $7.00 order would earn 30 points, and the remaining $1.00 would be rounded down. The monetary amount of the order is defined as the amount which the merchant receives, or the grand total minus shipping, tax, discounts, store credit, and gift cards. The points will be earned the moment when there are no non-invoiced items in the order (all items are either paid or canceled). If an Admin user does not want to allow customers to earn Reward Points for canceled orders, those points can be manually deducted from the Manage Customers page.

To manage exchange rates:

1. On the Admin menu, select **Customers > Reward Exchange Rates**. Then. in the upper-right corner, click the **Add New Rate** button.
2. In the Reward Exchange Rate Information section, do the following:

Reward Exchange Rate Information

a. Set **Website** to the sites where the reward exchange rate applies.

b. Set **Customer Group** to the groups where the reward exchange rate applies.

c. Set **Direction** to one of the following:

- Points to Currency
- Currency to Points

For either Direction setting, the amount is represented in the base currency of the website.

3. Enter the **Rate** values according to the Direction setting.

Points to Currency	In the first **Rate** field, enter the number of points. In the second **Rate** field, enter the monetary value of the points.
Currency to Points	In the first **Rate** field, enter the monetary value. In the second **Rate** field, enter the number of points that is represented by the monetary value.

When converting points to currency, the amount of points cannot be divided. For example, if 10 points converts to $2.00, points must be redeemed in groups of ten. Therefore, 25 points would redeem for $4.00, with 5 points remaining in the customer's balance.

4. When complete, click the **Save** button.

Field Descriptions

FIELD	DESCRIPTION
Website	The website(s) where the reward rates apply.
Customer Group	The customer group(s) to which the reward rates apply.
Direction	Determines which type of transaction the exchange rate define. Options include:

FIELD	DESCRIPTION	
	Points to Currency	Defines the number of points that can be applied as credit towards the amount of an order. In the first rate field, enter the number of points. In the second Rate field, enter the monetary value of the points.
	Currency to Points	Defines the amount of an order that can earn the customer a number of points. In the first Rate field, enter the monetary value. In the second Rate field, enter the number of points represented by the monetary value.

Reward Points in Price Rules

Reward points can be awarded to customers on the basis of a shopping cart rule. The award of points can be the only action of the price rule, or used in conjunction with a discount.

To add reward points to a price rule:

1. On the Admin menu, select **Promotions > Shopping Cart Price Rules**. Then, do one of the following:
   - In the list, click to open an existing price rule.
   - Click the **Add New Rule** button.
2. In the panel on the left, select **Actions**. Then, enter the amount of points in the **Add Reward Points** field.
3. Follow the standard instructions to complete the shopping cart price rule.

   When the price rule is activated, a message appears in the shopping to let customers know how many points they can earn by placing the order.

Chapter 28:

Private Sales and Events

Private sales are a great way to leverage your existing customer base to generate buzz and new leads, or to offload surplus inventory. You can create limited-time sales, limit sales to specific members, or create a stand-alone private sale page. You can also define invitations and event details.

Increase brand loyalty and generate a buzz by giving your best customers the VIP treatment. Offer exclusive access to Member Only sales or private sales to increase brand loyalty. You can also use these sales to liquidate excess merchandise. Customer Groups are extremely useful in setting up these types of Members Only and VIP sales.

Event Components

Categories

Each event is associated with a category from your catalog.

Events

Event sales are based on a starting and ending date. You can display a countdown ticker to show the time remaining.

Event Widget

When the Event Widget is enabled, it appears on the home page and category pages. It lists open and upcoming events, sorted by end date. If two or more events share the same end date, the events are sorted based on the order specified in the configuration.

Customer Groups

Category permissions are based primarily on customer groups.

Category Permissions

Category permissions gives you full control over the specific activities that can take place in a given category.

Website Restrictions

Prevent access to a website by redirecting to a landing page, login page, or registration page.

Invitations

Email messages are sent with a link to create an account in the store. You can restrict the ability to create an account to only those who receive an invitation.

Event Ticker

If the Category Page ticker is enabled for an event, the ticker block appears at the top of the product list. If the Product Page ticker is enabled, the ticker block also appears at the top of the product page (for products that are associated with the category).

Like the Event Widget, the ticker block displays a countdown ticker for open events, with the start and end date for upcoming events. If an event is closed, the ticker block will indicate this (and includes the start and end date, similar to Upcoming events).

Event Ticker

Selling Restrictions

By default, products that appear in upcoming or closed events are not available for general sale, and the Add to Cart button does not appear on the product list or product page.

To restore the Add to Cart button for a closed event, the event must be deleted. However, if a product is associated with another category that has no selling restrictions, the Add to Cart button does appear on the product page. Similarly, the ticker block does not appear on the product page if the product is associated with another category that has no selling restrictions.

Event Configuration

Before you can create an event, you must first complete the basic configuration to enable events and set up the event sidebar widget.

To enable and configure events:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Catalog, select **Catalog**.
2. Click to expand the **Catalog Events** section, and do the following:

Catalog Events

   a. Set **Enable Catalog Events Functionality** to "Yes."
   b. Set **Enable Catalog Event Widget on the Frontend** to "Yes."
   c. Enter the **Number of Events to be Displayed in the Event Sidebar Widget**. By default, this value is set to 5.
   d. Enter the number of **Events to Scroll per Click in Event Sidebar Widget**.
3. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable Catalog Events Functionality	Website	Determines whether the Events module is enabled.
Enable Catalog Event Widget	Store View	Determines if the Event Widget is available in the storefront. This is a static block with information about events in your site.
Number of Events to be Displayed on Category	Store View	Determines the number of events that appear in the Event widget on the category pages.
Number of Events to be Displayed on CMS Pages	Store View	Determines the number of events that appear in the Event widget on CMS pages, such as the home page.

Creating Events

Each event is associated with a category from your catalog, and only one event can be associated with any given category at a time.

Manage Catalog Events

To create an event:

1. On the Admin menu, select **Catalog > Categories > Catalog Events**.
2. In the upper-right corner, click the **Add Catalog Event** button. Then, do the following:
3. In the category tree, select the category that you want to associate with the event.

   Because each category can have only one event at a time, any categories that already have an event are disabled in the category tree.

Category Tree

4. In the Catalog Event Information section, do the following:

Catalog Event Information

a. Click the calendar button to select the **Start Date** and time of the event.

b. Click the calendar button to select the **End Date** and time of the event.

c. To upload an **Image** for the event widget, click the **Choose File** button. Then, select the image file from your directory.

d. In the **Sort Order** field, enter a number to indicate the sequence in which this event appears when listed with other events.

e. Select the checkbox of each page that you want to **Display Countdown Ticker On**.

5. When complete, click the **Save** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Category	Global	When creating a new event, this field links back to the category tree. When editing an event, it links to the category page related to the event.
Start Date	Global	The starting date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.
End Date	Global	The ending date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.
Image	Store View	Uploads an image for the event widget.
Sort Order	Global	Determines the sequence in which this event appears when listed with other events.
Display Countdown Ticker On	Global	Displays the countdown ticker in the header of each page specified. Options include: Category Page / Product Page
Status	Global	Indicates the status of the event based on the Start Date and End Date range. Status is a read-only value. Values include: Open / Closed / Upcoming

Editing Events

Events can be edited from either the Manage Catalog Events page or from the category that is associated with the event. Whenever a category has an associated event, an Edit Event button appears in the upper-right corner that takes you to the event information.

Edit Event

Method 1: Edit Event from Manage Catalog Events

1. On the Admin menu, select **Catalog > Categories > Catalog Events**.
2. On the Manage Catalog Events page, click to open the event that you want to edit.
3. Make the necessary changes to the event.

Edit Catalog Event

4. When complete, click the **Save** button.

Method 2: Edit Event from Category

1. On the Admin menu, select **Catalog > Categories > Manage Categories**.
2. In the category tree on the left, click to select the category. Then in the upper-right corner, click the **Edit Event** button.
3. Make the necessary changes to the event.
4. When complete, click the **Save** button.

Invitation Setup

When invitations are enabled, customers can send and view invitations from their account dashboard. The invitation email includes a link to the customer account registration form in your store. The invitation configuration enables invitations for the store and identifies the referring customer group. Invitations must be configured before they can be used for an event.

Invitation Workflow

The customer's account lists all invitations sent, including the email address of the recipient, and the current status (Sent, Accepted, or Canceled) on the "My Invitations" page. It also includes a Send Invitations button, which redirects to the Invitation form that contains a field for the email address of each recipient. The fields included and message text box are set up in the configuration. When the Send Invitations button is clicked, the invitation email is sent to the recipients. If a recipient email belongs to an existing customer, the invitation email is not sent to the email address, and no record is created in the system. Customers can also send invitations using the Send Invitations link in the store header.

To configure invitations:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select the **Invitations**.
3. Click to expand the **General** section. Then, complete the settings as described in the field description section below.

General

4. Click to expand the **Email** section. Then, do the following:

Email

a. Select the store identity to be used as the **Customer Invitation Email Sender**.

b. Select the **Customer Invitation Email Template** that is used for the invitations that are sent.

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	DESCRIPTION	
Enable Invitations Functionality	Determines whether the Invitations module is enabled.	
Referred Customer Group	Determines the customer group of the invitee. Options include:	
	Same as Inviter	Invitees are automatically assigned to the same customer group as the customers who invited them.
	Default Customer Group from Configuration	Invitees automatically have the default customer group.
New Accounts Registration	Determines how invitees can create an account. Options include:	
	By Invitation Only	Invitees must follow the link in the Invitation email to create an account.
	Available to All	Invitees can use the account registration form that is available in the store.
Allow Customers to Add Custom Message to Invitation Email	Determines whether there will be a field in the Invitation form in which the inviter can add a custom message which will be sent to the invitee via email. This does not affect the administrator's ability to add a message to an Invitation. Options include: Yes / No.	
Max Invitations Allowed to be Sent at One Time	Determines the maximum number of invitations that the	

FIELD	DESCRIPTION
	inviter can send at once. A different invitation is sent out to each email address that the inviter includes in the form. This protects server resources by preventing large numbers of Invitations from being sent at once, and makes it less likely for invitations to be sent as spam.
Customer Invitation Email Sender	Determines the sender of the email that invitees receive when an Invitation email is sent.
Customer Invitation Email Template	Determines the template of the email that invitees receive when an Invitation email is sent.

Invitation Reports

General

This report summarizes invitation information for the designated scope and period of time. The scope is defined in the Show Report control at the top of the page. There is one line for each period. A period can be a day, month, or year, and is defined in the Show by control at the top of the page. The number of periods in the report depends on the date range designated. For each period, you can see the total number of invitations sent, accepted, and canceled, as well as the percentage of sent invitations which have been accepted, and the percentage of sent invitations which have been canceled.

Customers

This report summarizes invitation information by customer for the designated scope and period of time. The scope is defined in the Show Report control at the top of the page. There is one line for each period. A period can be a day, month, or uear, and is defined in the Show by control at the top of the page. The number of periods in the report depends on the date range designated. For each period, you can see a list of all customers who have sent invitations, including their ID, name, email, and customer group. Additionally, you can see the number of invitations they have sent during that period, and the number of invitations which have been accepted.

Order Conversion Rate

This report summarizes Invitation and sales information for the designated scope and period of time. The scope is defined in the Show Report control at the top of the page. There is one line for each period. A period can be a day, month, or year, and is defined with the Show by control at the top of the page. The number of periods in the report depends on the date range designated. For each period, you can see the number of invitations which have been sent, the number of the invitations which have been accepted, the number customers who have completed an order after accepting an invitation, and the percentage of invitations sent that led to a completed order.

To view invitation reports:

1. On the Admin menu, select **Reports > Invitations**.
2. Select the report you want to view. Then, follow the process to generate the report.

Notes

Chapter 29:

Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento Enterprise Edition gives store administrators the ability to publish and distribute newsletters to customers who have registered to receive them, plus all the tools necessary to:

- Promote your newsletter
- Build and manage your list of subscribers
- Develop content
- Maintain an archive of back issues
- Drive traffic to your store

Newsletter Configuration

The first step in creating newsletters is to configure the newsletter settings for your site. You can require customers to confirm the registration by clicking a confirmation link sent by email. This technique is called **double opt-in**[1], because customers must confirm twice that they want to receive a newsletter. This method reduces the number of customers that might otherwise consider your newsletter as spam.

To configure newsletter settings on your site:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Newsletters**.
3. Click to expand the **Subscription** section. Then, do the following:
   a. Confirm the email templates and senders of the following email messages sent to subscribers:
      - Success email
      - Confirmation email
      - Unsubscription email
   b. To require people to double-opt in to confirm their subscription, set **Need to Confirm** to "Yes."
   c. To allow people who do not have an account with your store to subscribe to the newsletter, set **Allow Guest Subscriptions** to "Yes."
   d. When complete, click the **Save Config** button.

Subscription Options

[1]The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

Newsletter Templates

Before sending a newsletter, create a newsletter template. You can create and save as many of these as required for any situation, whether it be an annual holiday newsletter or weekly product updates.

The example newsletter template uses separate templates for the header and footer, and converts external CSS into inline styles. To learn more, see: Managing Email Templates.

Example Newsletter Template

To create a newsletter template:

1. On the Admin menu, select **Newsletter > Newsletter Templates**. The page lists the available newsletter templates. You can edit an existing template or create a new one.

2. To add a new template, click the **Add New Template** button. Then, do the following:

   a. In the **Template Name** field, specify a unique and indicative name for this template. This value is not visible for customers.

   b. In the **Template Subject** field, specify the subject of the email to be sent to your customers.

   c. In the **Sender Name** and **Sender Email** fields, specify the name and email of the sender of the email to be sent to your customers.

d. In the **Template Content** field, use the WYSIWYG editor to compose the body of the email. Note that this field is pre-filled with tags showing an unsubscribe link in the email. We recommend that you do not remove this link so that all emails that are sent enable your customers to unsubscribe from the newsletter.

e. Click **Preview Template**, to display the content with the formatting as it will be viewed by your subscribers.

3. When complete, click the **Save Template** button.

   After the template has been saved, a Save As button appears whenever the template is opened in edit mode. This gives you the ability to make changes and save it as a new template, without affecting the original.

Newsletter Queue

A newsletter that has many recipients must be sent in stages. The process of sending the newsletter is managed by a queue. After you start the queue, Magento sends the emails in packs.

To ensure delivery of your newsletters, it is recommended that you integrate your Magento installation with a third-party newsletter provider. These services are “white listed” by email service providers. Look for newsletter providers in Magento Connect.

To send your newsletter using a queue:

1. On the Admin menu, select **Newsletter > Newsletter Templates**.
2. Set the **Actions** control to the relevant template. Then, select **Queue Newsletter**.
3. In the **Queue Date Start** field, specify when the newsletter will start being sent.
4. In the **Subscribers From** field, select one or more store views whose customers this newsletter will be sent to.
5. Review the template and parameters and then click the **Save Newsletter** button to schedule sending the newsletter.

Newsletter Reports

Newsletter Queue

Shows the newsletter queues that have been defined and indicates their progress in sending emails.

Newsletter Subscribers

Shows a list of customers that have subscribed to your newsletter. It also enables you to unsubscribe these customers manually.

Newsletter Problem Reports

Shows a list of errors that have occurred while sending the email. This Report enables you to remove the incorrect emails from the subscribers list.

Notes

Chapter 30:

Sales Channels

Publishing your catalog through multiple channels is an effective way to widen your distribution without much effort. You can start by syndicating your content with RSS feeds, and then expand by sending your catalog data to shopping sites and aggregators and marketplaces.

Topics in this chapter:

- Social Media
- RSS Feeds

Social Media

There are many social marketing extensions that can be added to your store. To learn more, visit Magento Connect.

Social Marketing Extensions

Facebook Open Graph

The Facebook Open Graph 2.0 extension enables Facebook developers to add custom social networking buttons to your store. The Facebook Open Graph 2.0 extension is free of charge and can be downloaded from Magento Connect.

Facebook Open Graph

The extension uses the Facebook Open Graph 2.0 protocol. When the Facebook Open Graph 2.0 extension is successfully installed and all configuration is complete, the Facebook buttons appear on each product page in the store, along with the Facebook blocks that provide information about other Facebook users and friends who have clicked the social buttons. The information provided in the blocks depends on the customer who is logged in to Facebook and whether friends have performed actions with your app, such as clicked a social button.

Process Overview:

Step 1: Download and install the extension

Step 2: Create an application on the Facebook Developer site

Step 3: Configure Magento

Step 1: Download and Install the Extension

1. Visit Magento Connect, and download the Facebook Open Graph 2.0 extension. Then, copy the **Extension Key** to the clipboard.
2. On the Admin menu, select **System > Magento Connect > Magento Connect Manager**.
3. When prompted, enter your Admin credentials, and click the **Log In** button.

4. Paste the **Extension Key**, and click the **Install** button.

Step 2: Create Application on Facebook Developer Site

The current implementation of the Facebook Open Graph 2.0 extension requires an application to be created manually on the Facebook Developers site.

1. Navigate to: https://developers.facebook.com/
2. In the main menu, click **Apps**.
3. Click **Create New Application** and perform all of the steps of the app creation wizard.

   The App Namespace value that you entered will be used in the Magento configuration.
4. In the left column, select **Settings > Basic**. Under the "Select how your app integrates with Facebook" heading, select **Website**. Then in the **Site URL** field, enter your store address.

   > **Important!** Your website and store should have one domain name.

   a. For Action Types in the Advanced settings in the Graph API URL field enter own, want or other action you want to be associated with a social networking button on your product pages. This title is for internal use.

      > The dislike action is not supported by Facebook Open Graph 2.0, and cannot be saved.

   b. The Object Type you create should have the following Object Properties:

      - URL (page URL)
      - Title (product title)
      - Image (image URL)
      - Description (product description)
      - Price

      By default, a new Object Type has only the first four properties. To add the Price property, use the Add Another Property button on the Object Type page.

Step 3: Configure Magento

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Social, select Facebook.

   If the extension is installed, the Social tab appears in the Configuration panel.
3. Set **Current Configuration Scope** to your website.
4. In the Facebook Config section, do the following:

a. To display Facebook buttons in the store, set **Enable Facebook on Frontend** to "Yes."

b. Enter the **App Namespace** value of your application. You can find it in the Basic Settings section of your app on the Facebook Developers site.

c. Specify the **App ID** and **App Secret** values of your application. You can find them in the Basic Settings section of your app on the Facebook Developers site.

d. Enter the **Open Graph Type** value of your **Object Type**. To find it on the Facebook Developers site, open the settings of your application, navigate to Open Graph > Dashboard, click your object type, and expand the Advanced settings.

   On the page header, the system will display the Apps > %Your Facebook Application Name% > Open Graph > Object Type: %Object name%.

e. To add and configure a social networking button, click **Add Action Button** and complete the setup for each button. The action settings can be different for each store view.

Action	In the Action column, specify the internal button action title, for example, own or want. This value should correspond to the value you have specified in the Graph API URL field on the Facebook Developers site. The Graph API URL field is available in the Advanced section of the Action Type settings.
Button Title	In the Button Title column, specify the name of the social networking button as you want it to appear in the frontend.
Enable Friend Box	In the Enable FriendBox column decide if you want to display in the frontend the related Facebook block, which contains the count and the pictures of friends.
Count Friend Box	In the Count in FriendBox column, set the maximum number of friends that can be displayed in the related Facebook block. By default, it is set to 3. If you set zero value (0) or leave the field empty, then the default value is applied.

5. When complete, click **Save Config** button.

   The social network buttons you have created and the corresponding Facebook blocks now appear on the product pages of your store.

Google Shopping

Google Shopping gives you the ability to upload product feeds from your catalog so your products can be easily found through Google Search. Any Simple product from your catalog can be uploaded to Google Shopping. The product attributes that are mapped to Google are used as search parameters by customers looking for products. After mapping the product attributes to sync with Google Content attributes, you can create a simple upload from your store to Google Shopping.

Magento Connect has a number of extensions that you can install to establish integration with Google Shopping. Some extensions are free, and others are available for purchase from developers. In addition to Google Shopping, there are many extensions available to integrate your store with shopping sites. For example, Magento's Google Content API for Shopping extension allows developers to migrate their eCommerce stores into the new Google API to ensure that they come up in Google searches.

Visit Magento Connect and read the descriptions and reviews, to help you decide which solution is the best for your store. Then, follow the instructions to install the extension.

Setting Up RSS Feeds

RSS (Really Simple Syndication) is an XML-based data format that is used to distribute information online. Your customers can subscribe to your RSS feeds and be notified of new products and promotions. RSS Feeds can also be used to publish your product information to shopping aggregation sites, and can also be included in newsletters.

When RSS feeds are enabled, any additions to products, specials, categories, and coupons in your store are automatically sent to the subscribers of each feed. A link to all the RSS feeds that you publish is in the footer of your store.

The software that is used to read an RSS feed is called a **feed reader**[1], and allows people to subscribe to headlines, blogs, podcasts, and much more. Google Reader is one of the many feed readers which are available online for free.

To set up RSS feeds for your store:

1. From the Admin menu, select **System > Configuration**.
2. In the upper-right corner, set **Current Configuration Scope** to the store view where you want the feeds to be available.
3. In the panel on the left, under Catalog, select **RSS Feeds**.

[1]Software that is used to read syndicated content from RSS feeds.

RSS Feed Configuration

4. In the Rss Config section, set **Enable RSS** to "Enable." Then, in each section below, set the feeds that you want to activate to "Enable."

   a. In the Wishlist section, set **Enable RSS** to "Enable."

   b. In the Catalog section, set any, or all, of the following feeds to "Enable."

      - New Products
      - Special Products
      - Coupons/Discounts
      - Tags Products
      - Top Level Category
      - Top Level Category

   c. In the Order section, set **Customer Order Status Notification** to "Enable."

5. When complete, click the **Save Config** button.

Types of RSS Feeds

RSS FEED	DESCRIPTION
Wishlist	When enabled, an RSS feed link will be available on top of customer wishlist pages. Additionally, the wishlist sharing page will also include a checkbox that lets you add a link to wishlist RSS feeds on shared wishlists.
New Products	The new products RSS feed tracks new products added to the store catalog and will syndicate them.
Special Products	The special products RSS feed will syndicate products with special pricing.
Coupons / Discounts	Any special coupons or discounts generated in your store will be added to this RSS feed.
Tags Products	The tags products RSS feed manages and syndicates newly added product tags.
Top Level Category	This RSS feed tracks new top level categories, or root level categories, in your catalog.
Customer Order Status	Allows customers to track their order status with an RSS feed. When enabled, an RSS feed link will appear on the order.

Chapter 31:

Google Tools

Your store includes a number of tools to help optimize your content, analyze your traffic, and connect your catalog to shopping aggregators and marketplaces.

Topics in this chapter:

- Google Merchant Center
- Google Sitemap
- Google Analytics

Google Merchant Center

Google Merchant Center

Google Merchant Center helps you manage Google's shopping tools and services from a single dashboard. In addition to the following services, you can also link Google Analytics to your Merchant Center account.

Google Shopping

Google Shopping is a commercial service that helps shoppers find products on Google, compare products, and connect with merchants.

Product Listing Ads

Your product listings can include rich information, such as product image, price, and merchant name. Whenever a user enters a search query on Google.com that is relevant to an item you are trying to sell, Google will automatically show the most relevant products along with the associated image, price, and product name.

Process Overview:

Step 1: Open a Google Merchant Account
Step 2: Verify Your Website URL
Step 3: Claim Your Website URL

Step 1: Open a Google Merchant Account

1. Visit the Google Merchant Center, and do one of the following:
   - If you have a Google account, enter your **Email address** and **password**, and click the **Sign In** button.
   - Click the **Sign Up** button, and follow the instructions to create an account.
2. In the panel on the left, click to expand **Settings**, and select **General**.

Google Merchant Center Dashboard

3. Enter your **Store name** and **Description**.

4. Enter the full **Website URL** for your store. Depending on your domain, the URL might be formatted as one of the following:

   http://mystore.com

   http://www.mystore.com

   At this time, your Website URL is unclaimed and unverified.

Website URL Unverified - Unclaimed

5. Complete the remaining General settings information, and **Save Changes**.

Step 2: Verify Your Website URL

In this step, you will use Google Webmaster Tools to verify that you have the right to upload product listings from your store.

1. On a new browser tab, go to Google Webmaster Tools. Then, do the following:
   a. Click the **Add a Site** button. When prompted, enter the URL of your store, and click **Continue**.
   b. When prompted to verify that you are the owner of the site, click the **Alternate methods** tab.
   c. Select the **HTML tag** method, and press **Ctrl + C** to copy the code.

HTML Meta Tag Code

1. Return to your store's Admin, and select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Design**. Then, do the following:
   a. Click to expand the **HTML Head** section.
   b. Scroll down to the **Miscellaneous Scripts** box and press **Ctrl + V** to paste the verification code from the clipboard.
   c. When complete, click the **Save Config** button.

Paste Google Site Verification Code

3. Return to Google Webmaster Tools, and click the **Verify** button. When prompted, click **Continue**. Your site is now verified.

Google Webmaster Tools - Site Verified

Step 3: Claim Your Website URL

In this final step, you will establish the connection between your site and your Google Merchant account.

1. Return to the Google Merchant Center. The General Settings now show that your site is verified, but not claimed.

Google Merchant Center- Claim this URL

2. Click the **Claim this URL** link. Your Website URL is now both verified and claimed.

Website URL Verified and Claimed

Now that your site is verified, you can submit a sitemap to Google. You can also set up a Google Analytics account, and link it to your Merchant Center Dashboard.

Google Sitemap

Google Sitemap improves the way your store is indexed by their search engine, and is specifically designed to find pages which might otherwise be overlooked. As with the standard Magento sitemap, Google Sitemap is an index of all the pages on your site. However, unlike the Magento sitemap, the Google Sitemap is not visible to customers.

Process Overview:

Step 1: Remove any “robots.txt” Restrictions
Step 2: Generate the Sitemap
Step 3: Submit Your Sitemap to Google
Step 4: Restore Previous “robots.txt” Restrictions

Step 1: Remove any "robots.txt" Restrictions

When first setting up your Google Sitemap, you must provide full access for Google to index your site. If you have a robots.txt file, make sure that it includes the following instruction:

```
User-agent:*
Disallow:
```

After your sitemap has been successfully submitted to Google, you can restore any instructions to exclude certain locations of your site. If you have not yet set up a robots.txt file, you can do so after you finish the sitemap.

Step 2: Generate the Sitemap

1. On the Admin menu, select **Catalog > Google Sitemap**.
2. In the upper-right corner, click the **Add Sitemap**button. Then, do the following:
   a. In the **Filename** field, enter “sitemap.xml.”
   b. Enter the path on the server to the location of the sitemap. The path must be writable.
      - To put the sitemap in a folder, enter the path to the folder: /sitemaps
      - To put the sitemap at the base path of your store, enter a forward slash: /
   c. Set **Store View** to the view where the sitemap will be used.

Configure Google Sitemap

3. Click the **Save & Generate** button to create the sitemap.

   The sitemap appears in the list, with a link to sitemap.xml file. From here, you can do the following:

   - To view the sitemap, click the hyperlink in the **Link for Google** column. This is the link that you will later submit to Google.
   - To update the sitemap, click the **Generate** link.

Step 3: Submit Your Sitemap to Google

1. Go to **Google Webmaster Tools** and do one of the following:

   - Log in to your existing account.
   - Create a new account, and log in.

2. Click the **Add a Site** button.

Add a Site

3. When prompted to enter your store address, enter the full URL of your store: http://www.mystore.com

   Click the **Continue** button.

4. To verify that you are the owner of the site, click the **Alternate Methods** tab. Then, choose one of the following methods:

- Add a DNS record to your domain's configuration
- Add a meta tag to your site's home page

To verify your site with a meta tag, do the following:

a. Open two tabs on your browser; one for Google Webmaster Central, and the other that is logged in to the Admin of your store.

b. Follow the instructions on Webmaster Central to copy the full text of the Google site verification meta tag.

c. On the Admin menu, select **System > Configuration**. In the Configuration panel on the left, under General, click **Design**.

d. In the **HTML Head** section, scroll down to **Miscellaneous Scripts** and paste the site verification meta tag. Then, click the **Save Config** button.

e. Return to **Google Webmaster Central**, and click **Verify**.

Google Site Verification

5. After your site is verified and appears in your Google dashboard, do the following:

   a. Click the name of your store. Then, click the **Sitemaps** button.

   b. In the upper-right corner, click the **Add/Test Sitemap** button.

6. Return to your store Admin, and copy the path to your Google sitemap. If necessary, log back in and do the following:

   a. Go to **Catalog > Google Sitemap.**

   b. In the **Link for Google** column, right-click the link to your sitemap. Then on the context menu, click **Copy Shortcut**.

c. Open a text editor and paste the link. Then, copy the part of the link that comes after the “dot com.” It looks like this:

```
/media/s4d71280645299/sitemaps/sitemap.xml
```

7. Return to **Google Webmaster Tools** and paste the text into the box to complete the address of your sitemap. Then, click the **Submit Sitemap** button.

Submit Google Sitemap

8. Make sure that the link to your sitemap is working correctly, and that your Google dashboard shows the number of pages indexed.

Step 4: Restore Previous "robots.txt" Restrictions

If you changed your robots.txt file to make it fully accessible, you can now restore the previous instructions to disallow access to certain areas of your site.

Google Analytics

At the standard level, Google Analytics is a free service provided by Google that helps website owners find out more about the traffic on their website and about conversions. Magento supports the following Google Analytics options:

Page View Tracking

Shows the origin of visitors and the pages visited.

Ecommerce Tracking

Shows which customers make purchases, and what they buy.

Universal Analytics

An updated integration with additional Google features.

Process Overview:

Step 1: Set Up a Google Merchant Account

Step 2: Turn On Ecommerce Tracking

Step 3: Complete the Magento Configuration

Step 1: Set Up a Google Merchant Account

The first step is to establish a Google merchant account, and then verify and claim your website URL. For detailed instructions, see: Google Merchant Center.

When you sign up for an account, a report appears that shows your new Google Analytics account number in the following format: UA-XXXXXXX-1. Write this number down, because it is required to complete the configuration for your store.

Step 2: Turn On Ecommerce Tracking

1. Sign in to your Google Analytics account.
2. On the main menu, select **Admin**.

   The options in the Administration section are organized into three columns under Account, Property, and View. If you have multiple accounts or stores, make sure that the Account button is set to the correct account, and that the Property button is set to the correct store.

Google Analytics Admin

3. In the View column, select the **View Settings** option.
4. In the panel on the left, select **Ecommerce Settings**. Then, do the following:
   a. Click the **Status** switch to turn on Ecommerce Tracking. Then, click the **Next step** button.
   b. Click the **Submit** button to save the setting. When the Success message appears at the top of the page, you are done.

Ecommerce Tracking On

Step 3: Complete the Magento Configuration

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Google API**.
2. Click to expand the **Google Analytics** section, and do the following:

Google Analytics

3. Set **Enable** to "Yes."
4. In the **Account Number** field, enter the Google Analytics account number, or tracking code that you wrote down when you signed up for the service.
5. To anonymize part of your visitors' IP address before it is sent to Google, set **Enable IP Anonymization** to "Yes."

> According to Google, anonymizing IP addresses can reduce the accuracy of geographic data in the Analytics report.

6. When complete, click the **Save Config** button.

Notes

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EDITION

Content Elements

Chapter 32:

Magento CMS

The old adage, “content is king” is more true now than ever before. The term, **content marketing**[1] refers to the art of promoting your products or services by providing valuable information to your customers at no charge. The quality of your content helps distinguish your store from others, increases your visibility to search engines, and provides support to your customers. This soft-sell approach is often more effective than advertising, builds credibility and trust, and can turn your store into a destination.

Your content should reflect the branding of your store, and be delivered with your distinctive visual presentation and voice to convey your message. Use pictures to tell a story. Educate, inspire, and entertain. With quality content, sometimes less is more.

Magento Enterprise Edition includes a powerful content management system (CMS) that you can use to create rich content for your store. In this chapter, you will learn how to use your store’s CMS tools to create new content, and incorporate existing content to create a compelling experience that will keep customers coming back.

Topics in this chapter:

- Content Pages
- Page Hierarchy
- Blocks
- Banners
- Widgets
- Variables
- Layout Updates
- Markup Tags

Additional Resources

Curated Commerce

[1]The art of promoting products or services by providing valuable information at no charge.

CMS Tools

Pages

Create pages with text, images, blocks, video, and banners. In addition, you can use the Page Hierarchy tool to provide structure and navigation for your growing collection of content.

Static Blocks

The CMS makes it easy to create blocks of content without writing any code. Blocks can contain text, images, and even video, and can be assigned to any part of the page layout.

Banners

Create banners for a promotion that are visible to certain customer groups, or whenever price rule conditions and coupons apply.

Widgets

Use the Widget tool to display dynamic data and add blocks, banners, and interactive elements most anywhere in your store.

Polls

Create polls to learn about your customers' opinions and preferences. They're fun to take and see the results!

Notes

Chapter 33:

Content Pages

All content can be viewed in terms of its shelf life, just as any product in a store. Did you know that the shelf life of social media content is less than twenty-four hours? The potential shelf life of the content you create can help you decide where to invest your resources.

Content with a long shelf life is sometimes referred to as **evergreen content**[1]. Examples of evergreen content include customer success stories, "how to" instructions, and Frequently Asked Questions (FAQ.)

Other content is perishable by nature, such as events, industry news, and press releases. One way to get more mileage out of perishable content is to use the Page Hierarchy tool to create an archive of past content. You can organize articles from your newsletter, press releases, and events by month and year, to show that you are active and engaged.

Topics in this chapter:

- Creating a Page
- Using the Editor
- Version Control
- Page Hierarchy

[1]Content that has a long shelf life.

Core Content

The Magento demo store has examples of core content pages that can help you get started. Take a look at the following pages in your store, to make sure that they convey your message and brand.

Home

The demo "Home" page includes a banner, an image carousel, several static blocks with links, and a list of new products.

About Us

The "About Us" page is an example of page hierarchy with a content navigation menu on the left. The page has an image on the right, and another at the bottom to indicate the end of the page.

Customer Service

The "Customer Service" page is another node in the page hierarchy. The two headers on the page have content that only becomes visible when the header is clicked.

Reward Points

The "Reward Points" page is also a node in the page hierarchy, and explains how the reward program works, and the exchange rate for reward points.

Privacy Policy

Your store's "Privacy Policy" page should be updated with your own information. As a best practice, your privacy policy should explain to your customers the type of information that your company collects and how it is used.

Page Not Found

The "404 Page Not Found" page is named for the response code that is returned when a page cannot be found. URL redirects reduce the number of times that this page appears. However, for those times when it is necessary, you might as well take advantage of the opportunity to offer some links to products that the customer might find interesting.

Enable Cookies

The "Enable Cookies" page appears when visitors to your site do not have cookies enabled in their browsers. The page provides step-by-step, illustrated instructions to enable cookies for the most popular browsers.

Service Unavailable

The "503 Service Unavailable" page is named for the response code that is returned when the server is unavailable. This page can be set to appear when your store is in maintenance mode.

Creating a Page

The process of adding a new content page to your store is essentially the same for any type of page you might want to create. You can include text, images, blocks of content, video, and banners. In addition, you can use the Page Hierarchy tool to provide structure and navigation for your growing collection of content.

Don't forget that most content pages are designed to be read by search engines first, and by people second. Keep the needs of each of these two very different audiences in mind when choosing the page title and URL, composing the meta data, and writing the content.

Process Overview:

Step 1: Add a New Page
Step 2: Select the Page Layout
Step 3: Complete the Content
Step 4: Complete the Meta Data
Step 5: Publish the Page

Step 1: Add a New Page

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. Click the **Add New Page** button.
3. In the Page Information section, do the following:

Page Information

a. Enter a **Title** for the new page.

b. Enter a **URL Key** for the page that is based on the Title. It should be all lowercase characters, with hyphens instead of spaces.

   The URL Key is added to the base URL for your store, to create the online address for the page.

c. In the **Store View** list, select each view where this page will be available.

d. Set **Status** to "Disabled." (This will be changed when the page is ready to publish.)

e. Set **Under Version Control** to one of the following:

Yes	By default, your store keeps a backup of previous versions of each page. Backup pages are numbered, as,"New Page 1," "New page 2," and so on.
No	Writes over previous versions of the page. This is the recommended setting for content that is subject to frequent change.

4. With the required fields complete, click the **Save and Continue Edit** button.

Step 2: Select the Page Layout

1. In the Page Information panel on the left, select **Design**.

2. In the Page Layout section, set **Layout** to one of the following:

   - 1 column
   - 2 columns with left bar
   - 2 columns with right bar
   - 3 columns

Page Layout

Step 3: Complete the Content

1. In the Page Information panel on the left, select **Content**.
2. In the **Content Heading** box, type the text you want to appear as the main heading at the top of the page.

   Complete the remaining content, as you want it to appear in the main content column, according to the page layout selected. The content can include text, images, variables, and widgets with dynamic data.
3. Click the **Show / Hide Editor** button to display the WYSIWYG editor. You can format the text with the toolbar buttons.

WYSIWYG Editor

4. Click the **Show / Hide Editor** button again to return to the HTML mode. You can work in either mode that you prefer.

HTML Mode

5. Click the **Save and Continue Edit** button.

Step 4: Complete the Meta Data

1. In the panel on the left, select **Meta Data**.
2. Complete the **Keywords** and **Description** for the page. This information is used by search engines to index the page.

Step 5: Publish the Page

1. In the panel on the left, select **Page Information**.
2. Set **Status** to "Published."
3. If you're just starting out, set **Under Version Control** to "No." You can learn how to use version control later.
4. Click the **Save Page** button.

   When the page is complete, it can be added to the navigation of your store, linked to other pages, or added as a link in the footer.

Using the Editor

The WYSIWYG editor gives you the ability to enter and format while working in a "What You See Is What You Get" view of the content. If you prefer to work directly with the underlying HTML code, you can easily change modes. The editor can be used to create content for pages, blocks, and product descriptions. When working in the product catalog, the editor is accessed by clicking the WYSIWYG Editor button.

For a complete list of toolbar buttons, see the Editor Toolbar in the appendix of this guide.

Editor Toolbar

Inserting a Link

The easiest way to insert a link is to use the Link button in the editor toolbar. It doesn't require any knowledge of HTML and the result is the same.

To insert a link:

1. Highlight the text where you want to create the link. Then, in the editor toolbar, click the **Link** button.

Insert Link Button

2. In the **Link URL** field, enter one of the following:
   - The **URL Key** of a page in your store.
   - The full **URL** of an external page to be linked.
3. Set **Target** to one of the following:
   - Open link in the same window
   - Open in a new window
4. In the **Title** field, enter the tooltip text that appears when someone hovers over the link.
5. Click the **Insert** button to create the link.

Inserting Images

From the editor, you can insert an online image that resides on another server, or display an image that has been uploaded to your store's Media Storage library.

Media Storage

Method 1: Insert an Image from Media Storage

1. If necessary, click the **Show / Hide Editor** button to display the code.
2. Position the cursor where you want the code to be inserted. Then, click the **Insert Image** button.
3. Select the image that you want to use, and click the **Insert File** button.
4. To view the image in WYSIWYG mode, click the **Show / Hide Editor** button.

Method 2: Insert an Image from Another Server

Use this method to insert an image that is available online, but resides on another server. You must have the full URL of the image to complete the process.

1. Click the **Show / Hide Editor** button to work in WYSIWYG mode.
2. Position your cursor where you want the image to appear.
3. On the Editor toolbar, click the **Insert Image** button. Then, do the following:

Insert Image Button

a. In the **Image URL** field, paste the full Web address to the image.

b. In the **Image Description** field, write a brief description of the image.

c. In the **Title** field, write a relevant title for the image.

4. Click the **Insert button** to complete the process.

Adding a Widget

The Widget tool can be used to add a variety of content elements to the page, including links to any content page or node, product, or category. Links can be positioned on the page by block reference or incorporated directly into CMS content and email templates. You can create links to the following four types of content:

- CMS Hierarchy Nodes
- CMS Pages
- Catalog Categories
- Catalog Products

Links can be displayed as a block, or used inline and incorporated into existing text. By default, a link inherits its style from the location (block reference) according to the style sheet (styles.css) of the theme.

To add a widget to a page:

1. Open the CMS page to be edited.
2. In the panel on the left, select **Content**. Then, use either of the following methods:

Method 1: WYSIWYG Mode

1. Click the **Show / Hide Editor** button to display the page in WYSIWYG mode.
2. Position the cursor in the text where you want the widget to appear.
3. On the editor toolbar, click the **Insert Widget** button.

Method 2: HTML Mode

From the HTML editor, click the **Insert Widget** button.

3. When prompted, select the **Widget Type**. This example shows how to insert a link to a product.
4. You can leave the **Anchor Custom Text** field empty to use the product name.
5. Enter a **Anchor Custom Title** for best SEO practice. (The title isn't visible on the page.)
6. Set **Template** to one of the following:
   - To incorporate the link into text, select “Product Link Inline Template.”
   - To place the link on a separate line, select “Product Link Block Template.”

Select the Template

7. Click the **Select Product** button, and do the following:

   a. In the tree, navigate to the category you want.

   b. In the list, click the product that you want to include in the link.

Select the Product

   c. Click the **Insert Widget** button to place the link on the page. In the HTML, the link markup tag appears at the top of the page, enclosed in double curly braces.

   d. If needed, use Cut (Ctrl + x) and Paste (Ctrl + v) to position the markup tag in the code where you want the link to appear.

Widget Link Code

8. Click the **Show / Hide Editor** button to see the link in WYSIWYG mode.

Now you can continue editing the page, and incorporate the links into the rest of the content.

Widget Links on CMS Page

Version Control

Magento's version control system for CMS pages gives you the ability to create multiple versions of a page, track the revision history of each, and restore previous versions. You can separate the ability to create and publish content, based on permissions.

Pages under version control can be edited only from the Versions tab. Unlike other pages, the Content tab no longer appears in the Page Information panel. However, a link to the currently published version is included in the Page Information. If the page is not yet published, and the Status is set to "Disabled," a link to the version (and revision of the version), is shown instead. No matter how many page versions and revisions of versions exist, only one appears in the Manage Content list.

Under Version Control

To add version control to a page:

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. In the list, click to open the page in edit mode.
3. In the Page Information section, set **Under Version Control** to "Yes."

4. Click the **Save and Continue Edit** button.

5. In the panel on the left, select **Versions**. Then, do the following:

Versions

   a. In the list, click to open the page in edit mode.

   b. In the Version Information section, set **Access Level** to one of the following:

      - Private
      - Protected
      - Public

Version Information

   c. If your store Admin has multiple users, select the **Owner** of the page.

6. To revise a published page, in the panel on the left, select **Versions**, and edit the content, as needed.

7. To save the changes as a revision, but without publishing, click the **Save Page** button. The revision is added to the list.

Version Revisions

8. To publish the changes, click the **Publish** button.

   In the Page Information, the version number of the currently published revision is incremented to reflect the change.

Make sure that the **Status** of the page is set to "Published" so the page is visible in the store. If you need to return to Page Information, click the **Back** button a couple of times.

Currently Published Revision

Field Descriptions

FIELD	DESCRIPTION
Page Information	
Under Version Control	The Under Version Control option is available for every CMS page. Options include: Yes — Multiple revisions of the page can be created, published selectively, and restored as needed. No — Only one version of the page is saved, and previous versions cannot be restored.
Version Information	
Version Label	The name of the version is for internal reference, to help you keep track of different versions. For example, you might create a different version of the same page for each season.

FIELD	DESCRIPTION	
Access Level	Establishes the permissions necessary to access the version. Options include:	
	Private	Only the creator of the version can access the content.
	Protected	Only Admin users with Publish Revision permission can access the content.
	Public	All Admin users with CMS Page permission can access the content.
Owner	By default, the Admin user who created the page. If the access level is set to "Private," and the owner is changed, the previous owner will no longer have access to the content.	

Editing a Versioned Page

To access the content section of a versioned page, select the Versions tab in the Page Information panel. Initially, only one version is listed. When you select that version, you are redirected to a new page that displays the version options and revision information. Whenever changes to a revision are saved, a new revision is created. You can also save changes as a new version.

Revision Information

To edit a versioned page:

1. Do one of the following:
   - To edit the currently published version, under Page Information, click the **Currently Published Revision** link. The page revision opens in edit mode.
   - In the panel on the left, select **Versions**. Then in the Version Revisions list, click to open the revision you want to edit.
2. Edit the content as needed.
3. When complete, do one of the following:
   - To save a new revision under the same version name, click the **Save** button.
   - To save the revision under a new version name, click the **Save In New Version** button. When prompted, enter a name for the revision.

Chapter 34:

Page Hierarchy

Your store's page hierarchy system gives you the ability to organize your content pages and add pagination, navigation, and menus. If you publish a large amount of content on a regular basis, you can use page hierarchy to organize the content and make it easy for people to find articles of interest.

Topics in this chapter:

- Page Hierarchy Setup
- Adding a Node

Page with Left Navigation

Page Hierarchy Setup

Page hierarchy can be accessed from an individual CMS page, and also by using the Manage Page Hierarchy command. The CMS Page Hierarchy configuration settings activate the page hierarchy system and metadata, and determine the default menu layout.

Manage Hierarchy

The page hierarchy system uses nodes to identify related pieces of content, and to organize content pages into a parent/child relationship structure. A parent node is like a folder that can contain child nodes and pages. The relative position of each node and page in the hierarchy is shown as a tree on the left side of the Manage Pages Hierarchy page. A node can contain other nodes and content pages, and a single content page can be associated with multiple nodes and other content pages in a parent/child or neighbor relationship.

To set up page hierarchy:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **Content Management**.
3. Click to expand the **CMS Page Hierarchy** section, and make any changes that are necessary.

CMS Page Hierarchy

4. Click to expand the **CMS Versioning** section, and make any changes necessary.
5. Click the **Save Config** button to save your changes.

Field Descriptions

FIELD	DESCRIPTION
Enable Hierarchy Functionality	Activates the use of page hierarchy for your content pages. Options include: Yes / No
Enable Hierarchy Metadata	Gives you the ability to associate meta data with pages in the hierarchy. Options include: Yes / No
Default Layout for Hierarchy Menu	Determines the default menu style. Options include: Content Left Column Right Column

Adding a Node

The following example shows how to create a node with simple navigation to content pages. Although the node does not have a content page associated with it, it does have a URL Key which can be referenced elsewhere in your site.

For example, you can create a node called “Press Releases” with navigation to individual press releases. Then, include the link on your “About Us” page. Or how about creating a node with links to back issues of your newsletter?

Page Hierarchy with Nodes

Process Overview:

Step 1: Create a Node

Step 2: Add Pages to the Node

Step 3: Add Navigation

Step 1: Create a Node

1. On the Admin menu, select **CMS > Pages > Manage Hierarchy**.
2. Click the **Add Node** button.

3. In the Page Properties section, type a **Title** for the node. Then create a suitable **URL Key** using all lowercase characters, with hyphens instead of spaces.
4. Click the **Save Pages Hierarchy** button to save the node. The node appears as a folder in the tree.

Step 2: Add Pages to the Node

1. In the hierarchy tree, click to open the node.
2. Scroll down to the **CMS pages** section, and select the checkbox of each page you want to include.
3. Click the **Add Selected Pages(s) to Tree** button. Each selected page appears in the tree below the node folder.

Step 3: Add Navigation

1. In the tree, click to open the node.
2. In the Pagination Options for Nested Pages section, set **Enable Pagination** to “Yes.”
3. In the Navigation Menu Options section, and set **Enable Navigation Menu** to “Yes.”
4. Scroll back up to the Node Properties section, and click the **Preview** link.
5. Click the **Save Pages Hierarchy** button to save the settings.

Chapter 35:

Blocks

A block is a modular unit of content that can be positioned most anywhere on the page. Blocks can be used to display static information such as text, images, and embedded video, as well as dynamic information.

You can use Magento Enterprise Edition's content management system to create custom blocks of content without writing any code. Blocks can contain text, images, and even video, and can be assigned to any part of the page layout.

In addition, your store includes a selection of built-in blocks that make it easy to add features and functionality to your store. Some built-in blocks are required components of your store, while others are shopping tools that can be enabled or disabled according to your preference. Many of the built-in blocks can be added to your store with the Widget tool.

Blocks can also be defined and positioned by entering XML code in the Layout Update box on the target page. Custom CMS blocks can be referenced and positioned without writing any code by using the Widget tool.

Topics in this chapter:

- Creating a Static Block
- Positioning Blocks by Reference

Creating a Static Block

Magento gives you the ability to create blocks of content that can be used throughout your store. Custom, static blocks of content can be added to any page, group of pages, or even to another block. The carousel image slider on the home page of the demo store is generated by code that is placed in a static block. The three smaller blocks below are also static blocks.

Static Blocks on Home Page

To create a block:

1. On the Admin menu, select **CMS > Static Blocks**.
2. In the upper-right corner, click the **Add New Block** button. Then, do the following:
   a. Assign a descriptive **Block Title**.
   b. Assign a unique **Identifier** to the block. Use all lowercase characters, with underscores instead of spaces. The identifier is used for internal reference.
   c. Select the **Store View(s)** where this content block will be visible.
   d. Set **Status** to “Enabled” to make the block visible in the store.
   e. Complete the **Content** for the block. You can use the Editor to format text, create links and tables, add images, video, and audio.
3. When complete, click the **Save Block** button.

General Information

Positioning Blocks by Reference

The code that controls the page layout and placement of blocks is written in XML. You may have noticed references to XML Page Layout Updates throughout the Admin of your store. Every product, category, and piece of content—whether it's a page, block, banner, or app—has a section where you can update the XML code that controls the positioning of the item.

The selection of available block references that is available varies by page type, and whether the customer is logged in, or is visiting the as a guest.

The Widget tool makes it easy to position a block at a specific place on the page, and even for a specific product or category. You can select each option from a list, rather than trying to remember all of the possible combinations.

Category and CMS Pages

BLOCK REFERENCE	POSITION
Breadcrumbs	The navigation aid at the top of many pages that shows your current location as a link. Any additional content placed in the Breadcrumbs reference floats to the right of the breadcrumbs, if displayed.
Left Column	Content is added to the left column.
Main Content Area	Content is added to the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.

BLOCK REFERENCE	POSITION
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
Right Column	Content appears in the right column.
Store Language	Content appears in the upper-left corner of the header.

Product Page

BLOCK REFERENCE	POSITION
Alert URLs	Content appears below the title of the product on the product detail page.
Bottom Block Options Wrapper	If custom options are added, content appears below the Add to Cart button.
Breadcrumbs	Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that's showcased below the navigation bar.
Info Column Options Wrapper	If a custom options are added, content appears to the right. The same location applies to configurable options.
Left Column	Content appears below the left column blocks.
Main Content Area	Content appears below the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
PayPal Express Checkout (Payflow Edition)	If the PayPal payment method is enabled, content appears below the PayPal buy button.

BLOCK REFERENCE	POSITION
Shortcut Wrapper	
PayPal Express Checkout Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
Product Tags List	Content appears below the products tag bar.
Product View Extra Hint	Content appears below the main top price of the product.
Right Column	Content appears below the right column blocks.
Store Language	Content appears to the right of the language chooser.
Tags List Before	Content appears above the Add Your Tags field.

Notes

Chapter 36:

Banners

Banners can be used to display an image or block of content, and appear for a specific period of time for a promotion. You can create banners that are visible to certain customer groups, or whenever price rule conditions and coupons apply.

Topics in this chapter:

- Creating a Banner
- Using Banners with Price Rules

When designing banners for your store, you should take into consideration both the page layout and the theme you are using. Banners are often designed to appear on a specific page, and area of the page. Although the header and footer are a fixed width, the width of the content area, and the sidebars, can vary according to theme and page layout. When designing a banner with graphic images, it is important to understand the page layout, so you can take advantage of the available space.

Banner on Home Page

Creating a Banner

A banner can be as simple as an image. or contain a combination of text and code that triggers an event. After a banner is created, you can use the Widget tool to place it in your store, and combine it with other banners in a rotating sequence.

To create a banner:

1. On the Admin menu, select **CMS > Banners**.
2. Click the **Add Banner** button. Then, do the following:
   a. Enter a descriptive **Banner Name**.
   b. Set **Active** to "Yes."
   c. In the **Applies To** list, select one of the following:
      - Any Banner Type
      - Specified Banner Type

      This setting determines where in the store the banner can be used. (To select more than one, hold the Ctrl key down and click each option.)

Banner Properties

   d. In the panel on the left, select **Content**. Then in the **Default Content** section, enter any HTML code that is needed for the banner.
   e. To insert an image, click the **Insert Image** button. Then, select the image.
   f. To customize the content for a specific store view, clear the **Use Default** checkbox, and enter the custom content for the each view.
3. When complete, click the **Save Banner** button.

Banner Content with HTML

Banner Type by Location

LOCATION	DESCRIPTION
Content Area	The width of the main content area varies, depending on the column layout.
Footer	The bottom section of the page contains the footer links and copyright notice.
Header	The top section of the page contains your logo, account links, search box, and top navigation.
Left Column	The left column of a two- or three-column layout.
Right Column	The right column of a two-or three-column layout.

Creating a Banner Rotator

A banner rotator can be used to display a single banner, or multiple banners in a specific sequence or random order. The next banner in the sequence appears when the page is refreshed.

As a widget, the banner rotator can be assigned to a specific page, product, or category, and placed most anywhere in your store. In addition, a banner rotator can be associated with a specific shopping cart or catalog rule.

As an alternative, you can also use a jQuery slider or carousel that changes images automatically, like the one on the home page of the Magento demo store. There is a wide assortment of jQuery sliders available online, and many are free. To add a slider to your store, first create a static block. Follow the slider instructions to add the jQuery code to the block. Then, use the Widget tool to place the static block where you want it to appear in your store.

Process Overview:

Step 1: Create the Individual Banners

Step 2: Create a Widget Instance

Step 3: Configure the Banner Rotator

Step 1: Create the Individual Banners

Create the individual banners that you want to include in the rotator.

Step 2: Create a Widget Instance

Follow the basic steps to create a widget.

- Choose "Banner Rotator" as the type of widget.
- Specify the page and location where it belongs. (See Banner Layout Update Options)
- Choose the template to be used.

Step 3: Configure the Banner Rotator

1. If necessary, select **CMS > Widgets**, and click to open the banner rotator that you created in the previous step.
2. In the left panel, click **Widget Options** to configure the banner. Then, do the following:
   a. Set **Banners to Display** to “Specified Banners.”
   b. (Optional) To limit the banner to a certain section of the store, set **Restrict by Banner Types** to the section where you want it to appear.
   c. In the **Rotation Mode** list, select one of the following:

- Do not rotate, display all at once
- One at a time, Random
- One at a time, Series
- One at a time, Shuffle

3. To specify the banners you want to include, do the following:
   a. In the Specify Banners section, click the **Reset Filter** button to list all the available banners. You can also use the search filters to find the banners you want to include.
   b. Select the checkbox of each banner you want to include in the rotator.
   c. To set the sequence of each banner in relation to the others, enter a number in the **Position** column. If you wan the banner to appear in the first position, enter the number 1.
4. When complete, click the **Save** button.

Banner Layout Update Options

OPTION	DESCRIPTION	
Display On Categories	Determines the categories where the banner rotator appears.	
	Anchor Categories	Appears only on anchored category pages listed in the layered navigation.
	Non-Anchor Categories	Appears only on non-anchored category pages, which are category pages that are not shown in the layered navigation.
	Products	Displays the banner rotator for a specific product, or type of product. Options include: All Product Type Simple Product Grouped Product Configurable Product Bundle Product Virtual Product Gift Card
Categories	Displays the banner rotator for only the categories selected.	
Block Reference	Assigns the banner rotator to a specific location by reference. Options include:	

OPTION	DESCRIPTION
	Breadcrumbs Left Column Main Content Area My Cart Extra Actions Navigation Bar Page Bottom Page Footer Before Page Footer Bottom Page Header Page Top Right Column Store Language
Template	Options include: Banner Block Template Banner Inline Template

Banner Widget Options

OPTION	DESCRIPTION
Banners to Display	Options include: Specified Banners Shopping Cart Promotions Related Catalog Promotions Related
Restrict by Banner Types	Limits the banner to a certain section. Options include: Content Area Footer Header Left Column Right Column
Rotation Mode	Select the rotation mode for the banners. Options include: Do not rotate — Display one banner after the other, in a stack where all are visible. One at a time, Random — Displays the banners that you specify in a randomly generated order. Every time the page is refreshed, a different (and random) banner appears. One at the time, Series — Displays the banners that you specify by the order of their position every

OPTION	DESCRIPTION	
		time the page is refreshed.
	One at the time, Shuffle	Displays one banner at a time in a shuffled position order. This option is similar to the One at a time, Random option, except that the same banner does not repeat back-to-back (unless you have only one banner).
Specify Banners	Select the banners to include from the list of available banners.	

Using Banners with Price Rules

Any banners you have created can be associated with both catalog and shopping cart price rules for a promotion. To associate a banner with a price rule, you must first create the banner and the price rule.

To associate a banner with a price rule:

1. On the Admin menu, select one of the following:
   - Promotions > Catalog Price Rules
   - Shopping Cart Price Rules
2. In the list, click to open the rule where you want to add the banner. Then, do the following:
   a. In the Price Rule panel on the left, select **Related Banners**.
   b. In the list, select the checkbox of each banner that you want to associate with the price rule.

   > If your banners don't appear in the table, click the Reset Filter button to clear filtering rules.
3. When complete, click the **Save Rule** button.

Notes

Chapter 37:

Widgets

A widget is a snippet of code that makes it possible to display a wide range of content and place it at specific block references in your store. Many widgets display real-time, dynamic data and create opportunities for your customers to interact with your store. The Widget tool makes it easy to place existing content such as blocks, banners, and interactive elements most anywhere in your store. In addition, the widget code that you generate can be easily incorporated into other content directly from the editor.

You can use widgets to create landing pages for marketing campaigns, display promotional content at specific locations throughout the store. Widgets can also be used to add interactive elements and action blocks for external review systems, video chats, voting, and subscription forms, or to provide navigation elements for tag clouds, rotating banners, and image sliders.

Topics in this chapter:

- Widget Types
- Creating a Widget
- Static Block Widget
- New Products List
- Banner Rotator
- Order by SKU
- Mini Shopping Cart

Widget Types

Banner Rotator

Combines an assortment of banners into a single display, which can be set to rotate in a series, random order, or shuffle. The banner can be configured to appear on a specific page and location on the page.

CMS Hierarchy Node Link

Displays a link to a selected hierarchy node. Allows you to specify custom text and a link to the node. When the link is complete, it can be used in content pages and blocks.

CMS Page Link

Displays a link to a selected page. Allows you to specify custom text and title. When the link is complete, it can be used in content pages and blocks.

CMS Static Block

Displays a block of content at a specific location on a page.

Catalog Category Link

Displays a link to a selected catalog category. Allows you to specify custom text and a title. Two templates are available: inline and block. When the link is complete, it can be used in content pages and blocks.

Catalog Events Carousel

Displays a list of upcoming events.

Catalog New Products List

Displays a block of products which have been designated as new, for the duration of time specified in the product record.

Catalog Product Link

Displays a link to a selected catalog product. Allows you to specify custom text and a title. Two templates are available: inline and block. When the link is complete, it can be used in content pages and blocks.

Event

When the Event Widget is enabled, it appears on the home page and category pages. It lists open and upcoming events, sorted by end date. If two or more events share the same end date, the events are sorted based on the order specified in the configuration.

Gift Registry Search

Customers can search for public gift registries by name, or registry ID.

Order by SKU

The Order by SKU widget is a mini order form with two fields: SKU and Qty. It also contains a link to upload a CSV file with order data from the customer's account dashboard.

Orders and Returns

The Orders and Returns widget gives customers the ability to submit their own requests for return merchandise authorization.

Recently Compared Products

Displays the built-in block of recently compared products. You can specify the number of products included, and format them as a list or product grid.

Recently Viewed Products

Displays the built-in block of recently viewed products. You can specify the number of products included, and format them as a list or product grid.

Wishlist Search

Displays a form that allows shoppers to search for wishlists.

Mini Shopping Cart

If the store has a responsive theme, the Mini Shopping Cart widget can be used to display additional information, such as a banner or contact information, in the mini shopping cart.

Creating a Widget

The process of creating a widget is nearly the same for each type. You can follow the first part of the instructions, which is the same for all types, and then complete the last part that is specific to the type of widget you want to create.

Process Overview:

Step 1: Choose the Widget Type
Step 2: Specify Where It Goes
Step 3: Select a Template
Step 4: Complete the Instructions by Type
Step 5: Check It Out!

Step 1: Choose the Widget Type

1. On the Admin menu, select **CMS > Widgets**.
2. Click the **Add New Widget Instance** button.
3. In the Settings section, select the **Type** of widget you want to create. Then, click the **Continue** button.
4. In the Frontend Properties section, do the following:
   a. In the **Widget Instance Title** field, enter a descriptive title for the widget. This title is for internal use only, and won't be visible to your customers.
   b. Enter a number in the **Sort Order** field to determine the order of the block when listed with others in the column. The top position is zero.
   c. Set **Assign to Store Views** to "All Store Views," or to the view where you want the widget to be available. To select more than one, hold the Ctrl key down and select each option.

Step 2: Specify Where It Goes

1. In the Layout Updates section, click the **Add Layout Update** button.
2. Set **Display On** to the type of category or product page where you want the widget to appear.
3. In the **Block Reference** list, select the block or section of your page layout where you want the widget to appear.

Step 3: Select a Template

1. Set **Template** to one of the following:

Block Template	Formats the content so it can be placed as standalone unit on the page.
Inline Template	Formats the content so it can be placed inside other content. For example, a link that goes inside a paragraph of text.

2. Click **Save and Continue Edit** to save your changes and continue editing.

Step 4: Complete the Instructions by Type

The options for each type vary slightly, but the process is essentially the same.

- Banner Rotator
- CMS Static Block
- Catalog New Products List
- Order by SKU
- Mini Shopping Cart
- And more...

Step 5: Save Your Work and Check It Out!

1. When complete, click the **Save** button.
2. Follow the links in the message at the top of the workspace to update the index and page cache.
3. Go to your storefront and see how it looks!

CMS Static Block Widget

The CMS Static Block widget gives you the ability to place an existing CMS block most anywhere in your store.

Step 1: Choose the Widget Type

1. On the Admin menu, select **CMS > Widgets**.
2. Click the **Add New Widget Instance** button.
3. In the Settings section, set **Type** to “CMS Static Block.” Then, click the **Continue** button.
4. In the Frontend Properties section, do the following:
   a. In the **Widget Instance Title** field, enter a descriptive title for the widget. This title is for internal use only, and is not visible to your customers.
   b. Enter a number in the **Sort Order** field to determine the order of the block when listed with others in the column. The top position is zero.
   c. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.

Step 2: Complete the Layout Updates

1. In the Layout Updates section, set **Display On** to the category, product, or page where you want the block to appear.
2. To complete the Layout Updates, do the following:
   a. Select the **Page** where you want the block to appear.
   b. Select the **Block Reference** to identify the place on the page where the block will appear.
   c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."
   d. Click **Save and Continue Edit**.

Step 3: Place the Block

1. In the panel on the left, select **Widget Options**.
2. Click the **Select Block** button.

   Then in the list, click to select the block you want to place.
3. When complete, click the **Save** button.

   The new widget now appears in the Manage Widget Instances list.

4. When prompted, follow the instructions at the top of the workspace to update the index and page cache.

5. Return to your storefront to verify that the block is in the correct location. To move the block to a different location, you can reopen the widget and try a different page or block reference.

New Products List

The list of new products is an example of dynamic content, and consists of live data that is pulled from your product catalog. By default, the "New Products" list includes the first eight of the most recently added products. However, it can also be configured to include only products within a specified date range.

New Products List on Home Page

Process Overview:

Step 1: Set the Date Range for Each Product

Step 2: Create a Working Copy of the Widget

Step 3: Select the Location for the List

Step 4: Configure the List

Step 5: Preview Your Work

Step 1: Set the Date Range for Each Product

To make a product appear in the list by date range, the dates must be specified in the product record. The product then appears in the New Products list during the date range specified.

1. On the Admin menu, select **Catalog > Manage Products**.
2. Find the product you want to feature, and open the record. Then, do the following:
   a. In the **Set Product as New From Date** field, click the calendar button and select the first date that you want the product to be featured.
   b. In the **Set Product as New To Date** field, click the calendar button and select the last date that you want the product to be featured.

"Set Product As New " Date Range

3. When complete, click the **Save** button.
4. When you are prompted to reindex and refresh the page cache, click the links at the top of the workspace, and follow the instructions.

   The product will appear in the New Products list during this date range. Repeat this step for each product that you want to feature.

Step 2: Create a Working Copy of the Widget

The code that determines the content of the list and its placement in your store is generated by the Widget tool. To create your own working copy of the New Products list, simply save a copy of the existing widget. Your working copy is a new “instance” of the widget, and any changes you make will not affect the original.

1. On the Admin menu, select **CMS > Widgets**.
2. In the upper-right corner, click the **Add New Widget Instance** button.
3. In the Settings section, do the following:
   a. Set **Type** to "Catalog New Products List."
   b. Select the **Design Package/Theme** that is used by the store.
4. Then, click the **Continue** button.

Widget Type

5. In the Frontend Properties section, complete the following fields:

Widget Instance Title	Enter a descriptive title for your widget. This title is visible only from the Admin.
Assign to Store Views	Select the store views where the widget will be visible. You can select a specific store view, or "All Store Views."
Sort Order	(Optional) Enter a number to determine the order this items appears with others in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)

Widget Frontend Properties

Step 3: Select the Location for the List

1. In the Layout Updates section, click the **Add Layout Update** button. Then, do the following:
   a. Set **Display On** to "Specified Page."
   b. Set **Page** to "CMS Home Page."

c. Set **Block Reference** to “Main Content Area.”

d. Set **Template** to one of the following:

- New Product Lists Templates
- New Products Grid Template

Layout Updates

2. Click the **Save and Continue Edit** button to save your changes.

Step 4: Configure the List

1. In the panel on the left, select **Widget Options**.
2. Set **Display Products** to one of the following:

All Products	Lists products in sequence, starting with those most recently added.
New Products	Lists only the products which are identified as “New.” A product is considered to be new during the date range specified in the “Set Product As New From” date and “Set Product As New To” date. fields of the product. The list will be blank if the date range expires and no additional products have been set as "New."

3. Complete the remaining information as follows:

a. To provide navigation control for lists with multiple pages, set **Display Page Control** to “Yes.” Then, in the **Number of Products per Page** field, enter the number of products you want to appear on each page.

b. Set **Number of Products to Display** to the number of new products you want to include in the list. The default setting is 10.

c. In the **Cache Lifetime (Seconds)** field, select how often you want to refresh the list of new products. By default, the cache is set to 86400 seconds, or 24 hours.

Widget Options

4. When complete, click the **Save** button.
5. When prompted to refresh the cache, click the link in the message at the top of the workspace, and follow the instructions.

Step 5: Preview Your Work

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. Find the published page in the list, where you placed the New Products list. Then, in the **Action** column, click the **Preview** link.

Order by SKU Widget

The Order by SKU widget is a mini order form with two fields: SKU and Qty. It also contains a link to upload a csv file with order data from the customer's account dashboard.

Order by SKU Widget

To create an Order by SKU widget:

1. On the Admin menu, select **CMS > Widgets**. Then, click the **Add New Widget Instance** button.
2. In the Settings section, do the following:

Settings

   a. Set **Type** to “Order by SKU” and configure other widget options.
   b. Select the **Design Package/Theme** that will be used with the widget.
   c. Click the **Continue** button.
3. In the Frontend Properties section, do the following:

Frontend Properties

a. Enter the **Widget Instance Title**.

b. In the **Assign to Store Views** list, select each view where the widget will be available.

c. Enter a number in the **Sort Order** field to indicate the sequence of the Order by SKU block in relation to other blocks in the column.

4. Click the **Add Layout Update** button. Then, do the following:

Layout Updates

a. Set **Display On** to the pages where you want the Order by SKU widget to appear.

b. Select the **Categories** that you want to be used with the widget.

c. Set **Block Reference** to the location on the page where you want the widget to appear.

5. In the panel on the left, click **Widget Options**. Then, do the following:

Widget Options

a. To include a link in the widget, set **Display a Link to Loading a Spreadsheet** to "Yes."

b. Enter the **Link Text** that you want to appear in the link.

6. When complete, click the **Save** button.

Mini Shopping Cart Widget

You can use a widget to show relevant information to your customers when the mini shopping cart is displayed in your store. For example, you might want to display a promotional banner, or you could provide a phone number or other contact information.

> The mini shopping cart widget can be used only with responsive web design themes.

Widget in Mini Shopping Cart

Process Overview:

Step 1: Choose the Widget Type

Step 2: Complete the Layout Updates

Step 3: Place the Block

Step 1: Choose the Widget Type

1. On the Admin menu, select **CMS > Widgets**.
2. Click the **Add New Widget Instance** button.
3. In the Settings section, do the following:
   a. Set **Type** to "CMS Static Block."
   b. Set **Design Package/Theme** to any responsive web design (RWD) theme. You must select a responsive package/theme to use the mini cart widget.
   c. Click the **Continue** button.

Widget Settings

4. In the Frontend Properties section, do the following:

   a. In the **Widget Instance Title** field, enter a descriptive title for the widget. This title is for internal use only, and is not visible to your customers.

   b. Enter a number in the **Sort Order** field to determine the order of the block when listed with others in the column. The top position is zero.

   c. Set **Assign to Store Views** to "All Store Views," or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.

Frontend Properties

Step 2: Complete the Layout Updates

1. In the Layout Updates section, set **Display On** to the category, product, or page where you want the block to appear.

2. To complete the Layout Updates, do the following:

   a. Select the **Page** where you want the block to appear.

   b. Set **Block Reference** to "Mini-cart promotion block."

   c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."

   d. Click **Save and Continue Edit**.

Step 3: Place the Block

1. In the panel on the left, select **Widget Options**.

2. Click the **Select Block** button. Then in the list, click to select the block you want to place.

3. When complete, click the **Save** button.

   The app appears in the Manage Widget Instances list.

4. When prompted, follow the instructions at the top of the workspace to update the index and page cache.

5. Return to your storefront to verify that the block is in the correct location.

Chapter 38:

Variables

Variables are reusable pieces of information that can be created once and used in multiple places, such as email templates, blocks, banners, and content pages. Your Magento store includes a large number of predefined attributes, and also gives you the ability to create your own custom variables.

Topics in this chapter:

- Predefined Variables
- Custom Variables

Store Contact Information Variables

Predefined Variables

Predefined variables are easy to add to content pages, blocks, and email templates.

Inserting Predefined Variables

To add a variable to a page:

1. On the Admin menu, select **CMS > Pages > Manage Content**. Then, click to open the page.
2. In the Page Information panel on the left, select **Content**. Then from the editor, do one of the following:
   - Click the **Insert Variable** button.
   - If you prefer to work with the code, click the **Show / Hide Editor** button.
3. Position the insertion point in the text where you want the variable to appear. Then, click the **Insert Variable** button.
4. In the list of available store contact variables, click the one you want to use.
5. When complete, click the **Save** button.

To add a variable to a block:

1. On the Admin menu, select **CMS > Static Block**. Then, click to and open the block.
2. From the editor, do one of the following:
   - Click the **Insert Variable** button.
   - If you prefer to work with the code, click the **Show / Hide Editor** button.

3. Position the insertion point in the text where you want the variable to appear. Then, click the **Insert Variable** button.
4. In the list of available variables, click to select the one you want to use.
5. When complete, click the **Save Block** button.

To add a variable to an email template:

1. On the Admin menu, select **System > Transactional Emails**.
2. Do one of the following:
   - Click to edit a predefined template.
   - Click the **Add New Template** button to create a new one.
3. In the **Template Content** box, position the insertion point where you want the variable to appear. Then, click the **Insert Variable** button.
4. In the list of available variables, click to select the one you want to use. Email templates have an additional selection of variables.
5. When complete, click the **Save Template** button.

Predefined Variables

STORE CONTACT VARIABLES
Store Contact Information
Base Unsecure URL
Base Secure URL
General Contact Name
General Contact Email
Sales Representative Contact Name
Sale Representative Contact Email
Custom 1 Contact Name
Custom 1 Contact Email
Custom 2 Contact Name
Custom 2 Contact Email
Store Name
Store Contact Telephone
Store Contact Address

Template Variables

TEMPLATE VARIABLES
Store Url
Email Logo Image Url
Email Logo Image Alt
Customer Name
Store Name
Customer Account Url
Invoice Id
Order Id
Billing Address
Payment Details
Shipping Address
Shipping Description
Invoice Items Grid
Invoice Comment

Custom Variables

If you know a little basic HTML, you can create custom variables and incorporate them into pages, blocks, banners, and email templates. When a variable is inserted into HTML, it is formatted as a markup-tag, and enclosed in double curly braces.

```
{{CustomVar code= "store_hours"}}
```

To create a custom variable:

1. On the Admin menu, select **System > Custom Variable**.
2. Click the **Add New Variable** button.
3. Enter an identifier in the **Variable Code** field. Use all lowercase characters, without spaces.
4. Enter a **Variable Name**, which is used for internal reference. Then, do one of the following:
   - In the **Variable HTML Value** text field, enter any content you want to include, using basic HTML tags. This option allows you to format the value.
   - In the **Variable Plain Value** field, enter the variable value as plain text.
5. When complete, click the **Save** button.

To add a variable to a banner:

1. On the Admin menu, select **CMS > Banners**. Then, click to open the banner.
2. In the Default Content section, click the **Insert Variable** button.
3. In the list of available variables, select the one that you want to use..
4. When complete, click the **Save Banner** button.

To add a variable to an email template:

1. On the Admin menu, select **System > Transactional Emails**.
2. Do one of the following:
   - Click to edit a predefined template.
   - Click the **Add New Template** button to create a new one.
3. In the **Template Content** box, position the insertion point where you want the variable to appear. Then, click the **Insert Variable** button.
4. In the list of available variables, click to select the one you want to use.
5. When complete, click the **Save Template** button.

Notes

Chapter 39:

Layout Updates

Before you begin working with custom layout updates, it is important to understand how the pages of your store are constructed, and the difference between the terms *layout* and *layout update*. The term **layout**[1] refers to the visual and structural composition of the page. However, the term **layout update**[2] refers to a specific set of XML instructions that determines how the page is constructed.

The XML layout of your Magento Enterprise Edition store is a hierarchical tree of blocks. Some elements appear on every page, and others appear only on specific pages. You can see how blocks are referenced by examining the layout update code for your home page. To do so, simply open your CMS home page in edit mode, and select the Design tab to view the Page Layout section. Depending on the theme, it might contain instructions to remove blocks, unset blocks, and add blocks by referencing specific areas of the page layout.

In many cases, the same result can be achieved with a widget. To place a block of content with a widget, you must identify the page, and location on the page, where you want the block to appear. You can use a widget to place a block on any generic page of your store, including the home page and all CMS pages. However, to place a block in the sidebar of a specific CMS page, you must make a layout update.

Topics in this chapter:

- Placing a Block
- Controlling Block Order
- Standard Block Layout
- Layout Update Syntax
- Layout Update Examples
- XML Load Sequence

[1]The visual and structural composition of a page.

[2]A specific set of XML instructions that determines how the page is constructed.

Placing a Block with a Layout Update

Blocks can be placed in the left or right column of a specific page by making a layout update to the XML code. With a few simple changes to the code, you can position the block in either column, and control its position in relation to other blocks.

As you work with the underlying code, you will encounter slightly different terminology. For example, the term **callout**[1] is sometimes used to refer to a block that is defined as a layout update with XML code. The term **sidebar**[2] refers to the left or right columns of the page layout. For our general discussion, we use the terms block and column. However, when entering layout update code, make sure to follow the syntax exactly as shown in the example.

To place a block in a side column:

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. Click to open the CMS page. Then, in the panel on the left, select **Design**.
3. In the Layout Update XML box, enter the code for the right or left sidebar, as shown in example. Then, do the following:
   a. Change the **reference name** to identify either the “right” or “left” column.
   b. Change the **block_id** to the identifier of the block to be placed.

   Code for CMS Block in Side Column

```
<reference name="right">
<block type="cms/block" name="right.permanent.callout">
<action method="setBlockId"><block_id>your-block-id</block_id></action>
</block>
</reference>
```

4. When complete, click the **Save Page** button.

[1]Sometimes used to describe an XML block of page layout code.

[2]The right or left column of a two-column page layout.

Controlling Block Order

To control the order of blocks in an XML layout update, include a “before” or “after” positioning property in the code. To place a block—either before, or after a specific block—replace the hyphen with the block identifier, as shown in the following examples:

`before="-"`	Places the block at the top of the sidebar, before other blocks.
`after="-"`	Places the block at the bottom of the sidebar, after other blocks.

Code to Position CMS Blocks

```
<block type="cms/block" before="-" name="left.permanent.callout">

<block type="cms/block" before="some-other-block"
name="left.permanent.callout">

<block type="cms/block" after="-" name="left.permanent.callout">

<block type="cms/block" after="some-other-block"
name="left.permanent.callout">
```

Standard Block Layout

In the following diagram, the block names that can be used to refer to a block in the layout are black, and the block types, or block class paths, are blue.

Standard Block Layout

Block Descriptions

BLOCK TYPE	DESCRIPTION
`page/html`	There can be only one block of this type per page. The block name is "root," and, it is one of the few root blocks in the layout. You can also create your own block and name it "root," which is the standard name for blocks of this type.
`page/html_head`	There can be only one “head” block per page, and it is a child of the root block. This block must not be removed from layout.
`page/html_notices`	There can be only one block of this type per page. The block name is "global_notices," and it is a child of the root block. If this block is removed from the layout, the global notices will not appear on the page.
`page/html_header`	There can be only one block of that type per page. The block name is "header," and it is a child of the root block. This block corresponds to the visual header at the top of the page, and contains several standard blocks. This block must not be removed.
`page/html_wrapper`	Although included in the default layout, this block is deprecated, and only is included to ensure backward compatibility. Do not use blocks of this type.
`page/html_breadcrumbs`	There can be only one block of this type per page. The name of this block is "breadcrumbs," and it is a child of the header block. This block displays breadcrumbs for the current page.
`page/html_footer`	There can be only one block of this type per page. The block name is "footer," and it is a child of the root block. The footer block corresponds to the visual footer at the bottom of the page, and contains several standard blocks. This block must not be removed.
`page/template_links`	There are two blocks of this type in the standard layout. The "top.links" block is a child of the header block, and corresponds to the top navigation menu. The "footer_links" block is a child of the footer block, and corresponds to the bottom navigation menu. It is possible to manipulate the template links, as shown in the examples.
`page/switch`	There are two blocks of this type in a standard layout. The "store_language" block is a child of the header block, and corresponds to the top language switcher. The "store_

BLOCK TYPE	DESCRIPTION
	switcher" block is a child of the footer block, and corresponds to the bottom store switcher.
`core/messages`	There are two blocks of this type in a standard layout. The "global_messages" block displays global messages. The "messages" block is used to display all other messages. If you remove these blocks, the customer won't be able to see any messages.
`core/text_list`	This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.
`core/profiler`	There is only one instance of this type of block per page. It is used for the internal Magento profiler, and should not be used for other purposes.

Layout Update Syntax

Custom layout updates can be applied to product category pages, product pages, and CMS page to achieve a variety of results, such as:

`<block>`	Create new block.
`<reference>`	Update existing content.
`<action>`	Assign actions to blocks.
`<remove>`	Remove blocks.

Any change made to the layout is applied when the associated entity—which can be either a product, category, or CMS page—becomes active in the frontend of the store.

Custom layout update instructions consist of well-formed XML tags, without the <?xml ...> declaration and root tag. As with normal XML, every tag must either be empty or properly closed, as shown in the following examples:

```
<tag attribute="value" />

<tag attribute="value"> ... </tag>
```

<block>

Creates a new block within the current context. Layout block nesting defines the ordering of block initialization location of the blocks on the page.

NAME		VALUE
`type`	*	`block class path` An identifier of the block class path that corresponds to the class of the block. See the list of the available block types below.
`name`	*	`block name identifier` A name that can be used to address the block in which this attribute is assigned. If you create a new block with the name that is the same as one of the existing blocks, your newly created block substitutes the previously existing block. See the list of names of existing blocks below.
`before`		`block name | '-'` Is used to position the block before a block with the name specified in the value. If "-" value used the block is positioned before all other sibling blocks.
`after`		`block name | '-'` Is used to position the block after a block with the name specified in the value. If "-" value used the block is positioned after all other sibling blocks.
`template`		`template filename` A template filename used for the specific block type. As you have no way to see the list of template files, use whatever template value is demanded for every block type listed below.
`as`		`block alias` An alias name by which a template calls the block in which this attribute is assigned. Sometimes it's necessary to specify the alias for a specific block type.

<reference>

Changes the context for all included instructions to a previously defined block. An empty <reference> tag if of no use, because it affects only the instructions which are children.

NAME		VALUE
`name`	*	`block name` A name of a block to reference.

<action>

Used to access block API, in other words, call block's public methods. It is used to set up

the execution of a certain method of the block during the block generation. Action child tags are translated into block method arguments. The list of all available methods depends on the block implementation (e.g. public method of the block class).

NAME		VALUE
`method`	*	`block method name` A name of the public method of the block class this instruction is located in that is called during the block generation.

<remove>

Removes an existing block from the layout.

NAME		VALUE
`name`	*	`block name` The name of the block to be removed.

<extend>

This instruction performs final modifications to blocks which are already part of the layout. Every attribute in the <block> instruction—except for the block name—is subject for change. In addition,the special attribute *parent* can be used to change the parent of the block. Simply put the name of the new parent block into the <extend> instruction, and the parent of the block that is referenced will be changed in the layout.

NAME		VALUE
`name`	*	`block name` The name of any block to be extended.
`*`		`any other` Any other attribute specific for the <block> instruction.
`parent`		`block name` The name of the block that should become a new parent for the referenced block.
	*	Indicates a required value

Layout Update Examples

The following blocks types can be manipulated with custom layout instructions. Each action must be specified using the full syntax of the instruction. In the following examples, a simplified notation is used to refer to each action, which corresponds to the full syntax of the instruction.

Full Syntax

```
?

<!-- Action can be specified inside either a <block>

 or <reference> instruction. -->


   <action method="someActionName">

      <arg1>Value 1</arg1>

      <arg2>Value 2</arg2>

      <!--   -->

      <argN>Value N</argN>

   </action>

<!--   -->
```

Simplified Syntax

```
?

someActionName($arg1, $arg2, ..., $argN)
```

page/template_links

ACTION	DESCRIPTION
`addLink($label, $url, $title, $prepare`	
	Adds another link to the end of the list of existing links. Just specify the `$label` (link caption), `$url` (link URL) and `$title` (link tooltip), and you'll see a new link in the corresponding place. The `$prepare` parameter must be "true" if you want the URL to be prepared, or converted to the full URL from the shortened URL. For example, the newpage becomes BASE_URL/newpage if prepared.
`removeLinkByUrl($url)`	Removes a link from the block by its URL. Note that the

ACTION	DESCRIPTION
	URL must be properly specified and exactly match corresponding URL of the link you want to remove.

cms/block

ACTION	DESCRIPTION
`setBlockId($blockId)`	Specifies the ID of a CMS block, so its content can be fetched and displayed when the page is rendered.

```
?
<!--...-->

<reference name="content">
   <block type="cms/block" name="additional.info" as="additionalInfo">
      <action method="setBlockId"><id>additional_info</id></action>
   </block>
</reference>
<!--   -->
```

core/text

A core/text block can be used to enter free form text directly into the template.

ACTION	DESCRIPTION
`addText($textContent)`	Specifies text to be rendered as the block's content. After the text is specified, the layout update instructions must continue to be a valid XML statement. If you use HTML tags as part of the text, it is recommended to use: `<![CDATA[...]]>`

```
?
<!--...-->

<reference name="content">
   <block type="core/text" name="test.block">
```

```
      <action method="addText">
         <txt><![CDATA[<h2>ATTENTION!</h2><p>Check your options
carefully before you submit.</p>]]></txt>
      </action>
   </block>
</reference>
<!--   -->
```

page/html_welcome

This block can be used to duplicate the "Welcome, `<USERNAME>`!" message that appears in the header block. When the user is not logged in, the welcome message specified in the configuration appears.

XML Load Sequence

For developers, it is important to understand that blocks and layout updates must be loaded in the correct order, in keeping with the rules of precedence and **load sequence**[1] which determine how the page is rendered. Magento supports the following page layout scenarios:

Default Layout

The default layout consists of the elements that are visible from every page of the store. Whether it is a menu item, or a shopping cart block, each item has a **handle**[2] in the default section of the layout definition.

Specific Pages

The second case allows you to create a different layout for a specific page. The XML layout for specific pages is constructed in the same sequence that Magento loads modules, and is determined by the system configuration.

In addition to the instructions in the layout update files that are specific to each module, you can make a custom layout update that applies to a special case in the backend, that is merged each time the special case occurs.

[1]The order scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

[2]In programming, a name used to reference an object.

Notes

Chapter 40:

Markup Tags

A markup tag is a snippet of code that contains a relative reference to an object in your store, such as a page, block, or image. Markup tags can be incorporated into the HTML content of CMS pages, blocks, images, and email templates.

Topics in this chapter:

- Markup Tag Syntax
- Using Markup Tags in Links

Markup Tag Syntax

Markup tags are enclosed in double, curly braces, and can be generated by the Widget tool, or typed directly into HTML content. For example, rather than hard-coding the full path to a page, you can use a markup tag to represent the store URL. The markup tags featured in the following examples include:

Store URL

The Store URL markup tag represents the base URL of your website, and is used as a substitute for the first part of a full URL, including the domain name. There are two versions of this markup tag: One that goes directly to your store, and the other with a forward slash at the end that is used when a path is added.

```
{{store url='apparel/shoes/womens'}}
```

Media URL

The dynamic media URL markup tag represents the location and file name of an image that is stored on a content delivery network (CDN). The tag can be used to place an image on a page, block, banner, or email template.

```
{{media url='shoe-sale.jpg'}}
```

Block ID

The Block ID markup tag is one of the easiest to use, and can be used to place a block directly on a CMS page, or even nested inside another block. You can use this technique to modify a block for different promotions or languages. The Block ID markup tag references a block by its identifier.

```
{{block id='block-id'}}
```

Template Tag

A template tag references a PHTML template file, and can be used to display the block on a CMS page or static block. The code in the following example can be added to a page or block to display the Contact Us form.

“Contact Us” Template Tag

```
{{block type="core/template" name="contactForm"
template="contacts/form.phtml"}}
```

The code in the next example can be added to a page or block to display the a list of products in a specific category, by category ID.

"Category Product List" Template Tag

```
{{block type="catalog/product_list" category_id="22"
template="catalog/product/list.phtml"}}
```

Non-Inline CSS Tag

Because many email clients do not support CSS, this markup tag provides a way to convert the CSS styles that are used in email and newsletter templates to inline styles. The tag references the non_inline_styles variable to point to a CSS file on the server for the styles to be converted. The styles that are non-inline are copied to the <styles> tag of each message or newsletter that is sent. This tag can be used only with templates for transactional email and newsletters. To learn more, see the developer documentation.

```
{{var non_inline_styles.css}}
```

Widget Code

The Widget tool can be used to display lists of products, or to insert complex links, such as one that goes to a specific product page, based on product ID. The code that is generated includes the block reference, location of the code module, and corresponding PHTML template. After the code is generated, you can copy and paste it from one place to another.

The code in the following example can be added to a page or block to display the list of new products.

"New Products Grid" Code

```
{{widget type="catalog/product_widget_new"
display_type="new_products" products_count="10"
template="catalog/product/widget/new/content/new_grid.phtml"}}
```

The code in the next example can be added to a page or block to display a link to a specific product, by product ID.

"Link to Product" Code

```
{{widget type="catalog/product_widget_link" anchor_text="My Product Link"

title="My Product Link"template="catalog/product/widget/link/link_
block.phtml" id_path="product/31"}}
```

Markup Tags in Links

You can use markup tags with HTML anchor tags, and link directly to any page in your store. The link can be incorporated into CMS content, such as a page, static block, banner, or email template. You can also use this technique to link an image to a specific page.

Process Overview:

Step 1: Identify the Destination URL
Step 2: Add the Markup to the URL
Step 3: Complete the Anchor Tag

Step 1: Identify the Destination URL

If possible, navigate to the page that you want to link to, and copy the full URL from the address bar of your browser. The part of the URL that you need comes after the "dot com forward slash." Otherwise, copy the URL Key from the CMS page that you want to use as the link destination.

Full URL to Category Page

```
http://mystore.com/apparel/shoes/womens

http://mystore.com/apparel/shoes/womens.html
```

Full URL to Product Page

```
http://mystore.com/apparel/shoes/womens/nine-west-pump

http://mystore.com/apparel/shoes/womens/nine-west-pump.html
```

Full URL to CMS Page

```
http://mystore.com/about-us
```

Step 2: Add the Markup to the URL

The Store URL tag represents the base URL of your website, and is used as a substitute for the "http address" part of the store URL, including the domain name and "dot com." There are two versions of the tag, which you can use, depending on the results you want to achieve.

`store direct_url`	Links directly to a page.
`store url`	Places a forward slash at the end, so additional references can be appended as a path.

In the following examples, the URL Key is enclosed in single quotes, and the entire markup tag is enclosed in double curly braces. When used with an anchor tag, the markup tag is placed inside the double quotes of the anchor. To avoid confusion, you can alternate using single-and double quotes for each nested set of quotes.

1. If you are starting with a full URL, delete the "http address" part of the URL, up through and including the "dot.com forward slash." In its place, type the Store URL markup tag, up through the opening single quote.

Store URL Markup Tag

```
http://mystore.com/apparel/shoes/womens

{{store url='apparel/shoes/womens'}}
```

Otherwise, type the first part of the Store URL markup tag, and paste the URL key or path that you copied earlier.

Store URL Markup Tag with URL Key

```
{{store url='

{{store url='apparel/shoes/womens'}}
```

2. To complete the markup tag, type the closing double quotes and double braces.

Step 3: Complete the Anchor Tag

1. Wrap the completed markup tag inside an anchor tag, using the markup tag instead of the target URL. Then, add the link text, and closing anchor tag.

Markup in Anchor Tag

```
<a href="{{markup tag goes here}}">Link Text</a>
```

2. Paste the completed anchor tag into the code of any CMS page, block, banner, or email template, where you want the link to appear.

Complete Link with Markup

```
<a href="{{store url='apparel/shoes'}}">Shoe Sale</a>
```

Notes

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Design & Theme

Chapter 41:

Your Store Design

Magento provides a variety of easy-to-use design options that you can use to apply your own customized look-and-feel to your store. To learn more advanced techniques, such as how to use themes, skins, layouts, and blocks, see the Magento Design Guide.

Magento is an object-oriented environment with pages that are assembled from separate components. For some, this approach requires a slightly different way of thinking, because there isn't a single HTML page that corresponds to any given page. After you understand the basics, you'll appreciate working in such a flexible and fluid environment!

Topics in this chapter:

- Uploading Your Logo
- Uploading a Favicon
- Welcome Message
- Store Demo Notice

Additional Resources

Creating a Better Performing Magento Site by Design

Brand Strategy in an Omni-Channel World

Uploading Your Logo

The size of the logo in the header is determined by your theme. If your theme has a sample logo, you can right-click and download the logo to make sure the replacement logo is the same size.

Logo with Alt Text

The logo image path points to its location on the server. What is actually a long path is entered as a short path that is relative to the theme. For example:

Actual path: `skin/frontend/base/default/images/logo.gif`

Relative path: `images/logo.gif`

The header image filename is hard-coded into some of the theme files. Therefore, if you change the file name of the logo file, you will also have to make some simple updates to some source files. For non-programmers, the easiest approach is to use the default filename, "logo.gif," and write over the existing file.

To change the logo:

1. On the server, copy your new logo file to the images folder of your theme. For example:

   `images/media/logo.png`

2. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.

3. If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.

4. Click to expand the **Header** section. Then, do the following:

   a. If the path or file name has changed, enter it in the **Logo Image Src** field.

Logo Image Path

   b. In the **Logo Image Alt** field, enter the alt text for the image. If the configuration is for a different language view, enter the alt text in the appropriate language.

c. If your store uses a responsive theme, in the **Small Logo Image Src** field, enter the path to a version of the logo that is optimized for small devices.

5. When complete, click the **Save Config** button.

Uploading a Favicon

Favicon is short for "favorite icon," and refers to the little icon on the tab of each browser page. Depending on the browser, the favicon also appears in address bar, just before the URL.

Favicons are generally 16 x 16 pixels or 32 x 32 pixels in size. Although Magento accepts .ico, .png, .jpg, .jpeg, .apng, and .svg file types, not all browsers support these formats. The most widely-supported file format to use for a favicon is .ico. There are many free tools available online that you can use to generate an .ico image or convert an existing image to the .ico format.

Favicon in Address Bar

Process Overview:

Step 1: Create a Favicon

Step 2: Upload the Favicon to Your Store

Step 3: Refresh the Cache

Step 1: Create a Favicon

1. Create a 16 x 16 or 32 x 32 graphic image of your logo, using the image editor of your choice.

2. (Optional) Use one of the available online tools to convert the file to the .ico format. Then, save the file to your computer.

Step 2: Upload the Favicon to Your Store

1. On the Admin menu, select **System > Configuration**.

2. In the panel on the left, under General, select **Design**. Then, click to expand the **HTML Head** section.

3. To upload a favicon, click the **Choose File** button. Then, select the favicon file that you prepared.

Uploading a Favicon

4. To delete the current favicon, select the **Delete Image** checkbox.
5. When complete, click the **Save Config** button.

Step 3: Refresh the Cache

1. As soon as the favicon is uploaded, you are prompted to refresh the cache. Click the **Cache Management** link in the message at the top of the workspace.
2. In the list, select the **Page Cache** checkbox that is marked "Invalidated."
3. In the upper-right corner, set **Actions** to "Refresh" and click the **Submit** button.
4. To view the new favicon, return to your storefront and press **F5** to refresh the browser.

Changing the Welcome Message

The "Welcome" message in the header of the page expands to include the name of customers who are logged in. You can change the text for each store or store view.

Welcome Text

To change the welcome message:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
2. If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.
3. Click to expand the **Header** section.
4. Enter the **Welcome Text** that you want to appear in the header.

Changing the Welcome Text for a Store View

5. When complete, click the **Save Config** button.
6. When prompted to update the Page Cache, click the **Cache Management** link at the top of the workspace. Then, follow the instructions to refresh the cache.

Store Demo Notice

If you are using a store as a demo, or if it is online but still "under construction," you can display a store demo notice at the top of the page. When you are ready to "go live" with the store, simply remove the message.

To set the store demo notice:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
2. Click to expand the **HTML Head** section.
3. Scroll down, and set the **Display Store Demo Notice** as needed.
4. When complete, click the **Save Config** button.

Store Demo Notice

Notes

Chapter 42:

Page Layout

The layout of each page in your store consists of distinct sections, or containers, that define the header, footer, and content areas of the page. Depending on the layout, each page might have one, two, three columns, or more. You can think of the layout as the "floor plan" of the page.

Content blocks float to fill the available space, according to the section of the page layout where they are assigned to appear. You will discover that if you change the layout from a three-column to a two-column layout, the content of the main area expands to fill the available space, and any blocks that are associated with the unused side bar seem to disappear. However, if you restore the three-column layout, the blocks reappear. This fluid approach, or liquid layout, makes it possible to change the page layout without having to rework the content. If you are used to working with individual HTML pages, you will discover that this modular, "building block" approach requires a different way of thinking.

Topics in this chapter:

- Standard Layouts
- Storefront Examples

Standard Layouts

1 Column

The "1 Column" layout can be used to create a dramatic home page with a large image or focal point. It's also a good choice for a landing page, or any other page that has a combination of text, images, and video.

2 Columns with Left Bar

The "2 Columns with Left Bar" layout is often used for pages with navigation on the left, such as a catalog or search results pages with layered navigation. It is also an excellent choice for home pages that need additional navigation or blocks of supporting content on the left.

2 Columns with Right Bar

With a "2 Columns with Right Bar" layout, the main content area is large enough for an eye-catching image or banner. This layout is also often used for Product pages that have blocks of supporting content on the right.

3 Columns

The "3 Column" layout has a center column that is wide enough for the main text of the page, with room on each side for additional navigation and blocks of supporting content.

Empty

The "Empty" layout can be used to define custom page layouts. To learn more, see the Magento Design Guide.

Storefront Examples

The column dimensions are determined by style sheet of the theme. Some themes apply a fixed pixel width to the page layout, while others use percentages to make the page respond to the width of the window or device.

Most desktop themes have a fixed width for the main column, and all activity takes place within this enclosed area. Depending on your screen resolution, there is empty space on each side of the main column.

1 Column Layout

The content area of a "1 Column" layout spans the full-width of the main column. This layout is often used for a home page with a large banner or slider, or pages that require no navigation, such as a login page, splash page, video, or full-page advertisement.

1 Column Layout

2 Columns with Left Bar

The content area of this layout is divided into two columns. The main content column floats to the right, and the side bar floats to the left.

2 Columns Left Bar

2 Columns with Right Bar

This layout is a mirror image of the other two-column layout. This time, the side bar floats to the right, and the main content column floats to the left.

2 Columns Right Bar

3 Columns

This layout has a main content area with two side columns. The left side bar and main column are wrapped together, and float to the left. The other side bar floats to the right.

3 Columns

Chapter 43:

Page Setup

The main sections of the page are controlled, in part, by a set of standard HTML tags. Some of these tags control the selection of fonts, color, size, and background colors and images that appear in each section of the page. Other settings control page elements such as the logo that appears in the header, and the copyright notice in the footer. The basic page properties can be set from the Admin.

Topics in this chapter:

- HTML Head
- Page Header
- Page Footer

HTML Head

The HTML Head section corresponds to the <head> tag of an HTML page and can be configured for each store view. In addition to meta data for the page title, description, and keywords, it can include a link to the favicon and scripts. Instructions for search engine robots and the display of the store demo notice are also configured in this section.

HTML Head Configuration

To configure the HTML Head:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
2. For multiple stores or views, set **Current Configuration Scope** in the upper-left corner to the store or view where the settings apply. Then, clear the checkbox after each field so new values can be entered.
3. Update the fields as needed.
4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Favicon Icon	Store View	Uploads the small graphic image that appears in the address bar and tab of the browser.
Default Title	Store View	The title in the title bar of each page when viewed in a browser. The default title is used for all pages, unless another is specified for individual pages.
Title Prefix	Store View	A prefix can be added before the title to create a two- or three-part title. A vertical bar or colon can be used as a separator after the prefix to differentiate it from the main title.
Title Suffix	Store View	A suffix can be added after the title to create a two-or three part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.
Default Description	Store View	A summary of your site for search engine listings, not be more than 160 characters long.
Default Keywords	Store View	A series of keywords that describe your store, each separated by a comma.
Default Robots	Store View	Instructions that tell search engines how to index your site. Options include: INDEX, FOLLOW NOINDEX, FOLLOW INDEX, NOFOLLOW NOINDEX, NOFOLLOW
Miscellaneous Scripts	Store View	An input box for uploading miscellaneous scripts to the server. For example, JavaScript that must be placed before the <body> tag can be entered here.
Display Demo Store Notice	Store View	Controls the display of the demo store notice at the top of the page. Options include: Yes / No

Page Header

The Header section identifies the path to the logo file, and specifies the logo alt text and welcome message.

Header Configuration

To configure the Header:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **Design**.
3. Click to expand the **Header** section, and make any changes necessary.
4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Logo Image Src	Store View	Identifies the path to the logo that appears in the header.
Logo Image Alt	Store View	The Alt text that is associated with the logo.
Small Logo Image Src	Store View	Identifies the path to a smaller version of the logo that is used with responsive themes and optimized for a small screen.
Welcome Text	Store View	The welcome message appears in the header of the page and includes the name of customers who are logged in.

Page Footer

The Page Footer configuration section is where you can update the copyright statement that appears at the bottom of the page, and enter miscellaneous scripts.

Footer Configuration

Field Definitions

FIELD	SCOPE	DESCRIPTION
Copyright	Store View	The copyright statement that appears at the bottom of each page. To include the copyright symbol, use the HTML character entity: ©
Miscellaneous HTML	Store View	An input box where you can upload miscellaneous scripts to the server. For example, third-party JavaScript— such as an analytics tracking code—that must be placed after the <body> tag, can be entered here.

Notes

Chapter 44:

Your Store's Theme

A theme is a collection of files that determines the visual presentation of your store. You might think of a theme as the "window dressing" of your store. When you first install Magento, the design elements of the store are based on the "Default" Theme. In addition to the initial default theme that comes with your Magento installation, there is a wide variety of themes that are available "off the shelf" on Magento Connect.

Magento themes include layout files, template files, translation files, and skins. A skin is a collection of supporting CSS, images, and JavaScript files that together, create the visual presentation and interactions that your customers experience when they visit your store. Themes and skins can be modified and customized by a developer or designer who has knowledge of Magento theme design and access to your server. To learn more, see the Designer's Guide to Magento.

Topics in this chapter:

- Responsive Web Design
- Using the Default Theme
- Installing a New Theme

Responsive Web Design

Responsive design is an approach to web page creation that flows the page layout to fit the visitor's screen size and orientation, and changes the layout accordingly. The Magento default responsive theme features style sheets that support flexibility for layouts and images, and helps provide a pleasing experience for site visitors using mobile devices. By comparison, non-responsive sites or sites not optimized for smaller screens or mobile devices are often slow or difficult to read, and offer a clunky mobile eCommerce experience.

Responsive Theme on Tablet and Smartphone

Benefits of using the Magento default responsive theme include:

- You can get a tablet and smart phone friendly responsive site in about half the time as before, speeding time to market and freeing up resources for other projects.
- Your responsive site makes you better able to participate in the fast growing mobile commerce space, and gives you the ability to create a website that is more easily adapted to new opportunities and less expensive to maintain. A responsive site also offers potential search engine optimization (SEO) benefits from using Google's preferred approach to mobile-optimizing sites.
- You no longer need to develop separate content per device. The default theme is easy to customize for simple sites, and provides a powerful starting point for developing themes for more complex sites.

Technical Information

Technologies used in Magento's default responsive theme include **Sass/Compass**[1] and **jQuery**[2] in `noConflict()` mode. Additional JavaScript libraries are discussed in more detail in the Responsive Theme Developer's Guide.

The responsive theme code is located on the server in the following directories, relative to your Magento installation:

Code Location

```
app/design/frontend/rwd

skin/frontend/rwd
```

Using the Default Theme

The default Magento Enterprise Editiontheme uses Responsive Web Design (RWD) principles. Responsive web design enables you to use a single theme to present your storefront to your customers regardless of which device they use. The theme uses modern technologies and incorporates best practices for mobile site experience.

To view the default theme:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **Design**.
3. Click to expand the **Package** section. The new responsive theme is enabled by default. The default package name is "rwd."

Default RWD Theme Package

4. Click to expand the **Themes** section. The Default field shows the name of the default RWD theme.

[1] A CSS pre-compiler that provides organizable, reusable CSS.
[2]

Default RWD Theme

5. When complete, click the **Save Config** button.

Installing a New Theme

Magento Connect contains hundreds of extensions, which as add-ons to Magento, can extend the functionality or enhance the appearance of your store.

Magento Connect

To install a new theme:

1. Go to Magento Connect.
2. In the upper-right corner, click to extend the **All Platforms** list, and choose **Enterprise**
3. You can browse through the available themes based on price or popularity, or do a keyword search. For more information, click the thumbnail of any theme.
4. To get the registration key, you must be a registered Magento Enterprise Edition owner and be logged into your account. Then, click the **Install Now** button to get the license key.

Install Now

5. To complete the process, follow the instructions to install an extension from Magento Connect.

To activate the theme for your store:

1. On the Admin menu, select **System > Configuration**. In the panel on the left, under General, select **Design**.
2. Click to expand the **Themes** section. Then, do the following:

Themes

3. In the **Default** field, enter the name of the theme. The name of the Magento demo store theme is "mds."
4. If you want to switch to this theme as an alternate when your store is viewed with different browsers or devices, do the following:
   a. Click the **Add Exception** button.

      The Add Exception button is used to use a different theme for specific browsers. For example, a theme that is optimized for mobile can be used whenever a mobile device is detected.

Add Exception

b. In the **Matched Expression** field, enter the name of the browser or device that triggers the use of the alternate theme. If there are multiple browsers, separate the name of each with a vertical bar. For example, because the mobile theme can be used with multiple devices, you can enter them all in the Match Expression field, as follows:

```
Android|Blackberry|Googlebot-Mobile|iPhone|iPod|mobi|Palm|Opera
Mini|Windows Mobile
```

c. In the **Value** field, enter the name of the theme. In this example, the value is "Mobile."

5. Click the **Save Config** button on the top right of the page.

6. Test the new theme from your store. If you installed an exception for different browsers, view the store with each browser or device.

   If the new theme uses a different page layout than your current home page, you might need to change its page layout setting to match the theme.

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Customers

Chapter 45:

Customer Accounts

The header of every page in your store extends an invitation for shoppers to “Log in or register” for an account with your store. You have the option to require that customers register before making a purchase, or to allow them to make purchases as guests. Customers who open an account with your store enjoy a range of benefits, including:

Faster Checkout

Registered customers move through checkout faster because much of the information is already in their accounts.

Ability to Self-Serve

Registered customers can update their information, check the status of orders, and even reorder from their account dashboard.

Account Dashboard

Customers can access their account dashboard by clicking the “My Account” link in the header of the store. They can use their account dashboard to view and modify their information, including past and current addresses, billing and shipping preferences, newsletter subscriptions, wishlists, and more. They can also view tags and product reviews they have created while logged in to your store.

Account Dashboard

Dashboard Sections

Account Information

Customers can update their account information and change their password, as needed.

Address Book

The customer address book includes the default billing and shipping address, and additional address entries.

My Orders

Displays a list of all customer orders, with a link to each. Any order can be reordered by simply clicking the Reorder link.

Billing Agreements

Displays a list of any customer billing agreements.

Recurring Profiles

Displays a list of any products that are purchased on a recurring basis, as a subscription.

Order by SKU

A quick order form that allows the customer to order by SKU or import a list of products to be ordered.

My Product Reviews

Displays a list of all product reviews submitted by the customer, with a link to each.

My Tags

Displays a list of all product tags made by the customer.

Wishlists

Displays a list of the wishlists created by the customer. New wishlists can be created and shared, and products can be added to the cart.

My Applications

This section is a placeholder for API applications that link the customer account to other applications or extensions.

Newsletter Subscriptions

Lists all available newsletters. Each newsletter the customer currently subscribes to has a checkmark.

My Downloadable Products

Lists all downloadable products the customer has purchased, with a link to each.

My Store Credits

Shows the balance and history of the customer's account.

Gift Cards

The customer can enter a gift card code to check the balance, or redeem the gift card.

Gift Registry

Lists all gift registries created by the customer. Gift registries can be edited, shared, and deleted.

Reward Points

Shows the balance of reward points, the cash balance, and current exchange rate.

My Returns

Displays a list of any products returned by the customer.

Invites

Displays a list of all invitations sent to events.

Order by SKU

The Order by SKU tab contains the fields for entering SKUs and quantities, and controls for loading a .csv file with a list of SKUs. The Order by SKU widget includes the fields for SKUs and quantities and optionally a link to the Order by SKU tab.

To order by SKU from your customer account:

1. From your Account dashboard, in the panel on the left, select **Order by SKU**. Then, do the following:
2. In the Order by SKU block, enter the **SKU** number and **Qty** you want to order.
3. To add another item, click the **Add Row** button.
4. In the Order by SKU block, click the Load a List of SKUs link.

To upload a list of SKUs:

1. Prepare a csv file with the order data. The file can be created in a spreadsheet with the columns “sku” and “qty.” Then, save the data as a csv file.
2. On the Order by SKU page, click the **Choose File** button. Then, find the csv file that you prepared with the order data.
3. Click the **Add to Cart** button.

Uploading a CSV Data File

Exception Handling

Products that cannot be added to the shopping cart are listed in a separate section on the page. Products in this section can be added to cart after the customer completes the missing information, such the choosing product options, or entering the quantity to be purchased. A customer can ignore the section with failed products and proceed to checkout with the products that were successfully added. Any failed products are stored for the duration of the session.

After a customer specifies SKUs or loads a spreadsheet with SKUs, and chooses to add them to the shopping cart, all products that can be ordered and do not require additional configuration are added . All other products are displayed in a separate section with the heading, “Products Requiring Attention.”

Products Requiring Attention

The following conditions may interfere with products being added to a cart:

- A product with multiple options, such as a configurable, grouped, bundle, gift card, or simple product with custom options.
- A product that is out of stock or disabled
- There is not enough quantity in stock and backorders are not allowed
- No product with a specified SKU is found in the catalog
- The quantity specified is less than the minimum allowed in the cart for a product
- The quantity specified is greater than the maximum allowed in the cart for a product
- A product cannot be added because of category permissions settings
- A product is assigned to another website
- A product is configured to be not visible individually
- A product cannot be added because of other errors, such as errors in an installed extensions or customization

Important! Order by SKU supports ordering by a compound SKU value, consisting from the system SKU value and a value of the custom option SKU, delimited by the “-” sign. However such a compound value can be processed correctly only if both the system SKU and custom option(s) SKU values do not contain a "-" sign. The compound dynamic SKUs of bundle products are not supported.

Customer RMA Requests

RMA requests can be created only for an order with a shipment record. Both account-holding customers and guests can make RMA requests. When the request is saved, it appears in the My Returns section of the customer account. The request cannot be edited, but comments can be added. New RMA requests have a status of "Pending." When the status changes, it is reflected in the customer's account.

To access an RMA from a customer account:

1. Log in to the customer account. Then in the panel on the left, select **My Orders**.
2. Find the order with the items to be returned, and click the **View Order** link.
3. In the upper-right corner, click the **Return** link.

Return Link

4. By default, each return product a customer must complete the following fields. To add more fields, see: RMA Item Attributes.

Quantity to Return	The quantity of the product items that a customer wants to return. For complex products this field does not appear. The customer specifies the quantity to return for each simple product in the Item field.
Reason to Return	By default, the following values are available: Wrong Color, Wrong Size, Out of Order, and Other. If Other is selected, the additional text field appears for specifying the reason.
Desired Resolution	The way the customer wants to resolve the situation. By default, the following values are available: Exchange, Refund, Store Credit.
Item Condition	By default, the following values are available: Unopened, Opened, and Damaged.

To add more products to the return request, click the **Add Item to Return** link in the bottom of the page.

5. When complete, click the **Save** button to submit the request.

RMA Request

Customer Store Credit

The Store Credit section of a customer account shows the current balance, available gift card balances, and the balance history, if enabled in the configuration.

Customers can apply a gift card balance toward their store credit. There is a link to the Gift Card tab. (For Virtual or Combined gift cards, the email sent to the recipient also includes a link to the Gift Card tab). The customer can enter the gift card code, and redeem the gift card to transfer the balance. For the balance to be transferable, the gift card account must be set to be redeemable.

Customer Account Store Credit

Chapter 46:

Customer Groups

The customer group determines which discounts are given to a customer, as defined by price rules, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.

Topics in this chapter:

- Creating a Customer Group
- Editing a Customer Group

Customer Information with Group

Creating a Customer Group

Customer groups can be referenced in promotional price rules, used to target customer segments, and associated with specific tax classes. Follow these steps to create the customer groups you need for your store.

To create a customer group:

1. On the Admin menu, select **Customers > Customer Groups**.

Add New Customer Group

2. To create a new group, click the **Add New Customer Group** button. Then, do the following:

   a. Enter a unique **Group Name** to identify the group from the Admin. The name must be less than 32 characters.

   b. Select the **Tax Class** that applies to the group.

Group Information

3. When complete, click the **Save Customer Group** button.

To edit a customer group:

1. On the Admin menu, select **Customers > Customer Groups**.
2. In the list, click to open the customer group record.
3. Make the necessary changes.
4. When complete, click the **Save Customer Group** button.

Chapter 47:

Customer Attributes

Magento has many built-in customer data fields to support the order, fulfillment and customer management processes. However, every business is different and sometimes additional fields are needed. You can create and manage additional customer and address attributes as needed.

You can add custom attributes to the Account Information, Address Book, and Billing Information sections of the customer's account. Customer address attributes can appear in the Billing Information section during checkout, or when guests register for an account. You can even create a special account page for guests to use when registering for a customer account.

Topics in this chapter:

- Custom Customer Attributes
- Address Attributes

Custom Customer Attributes

To create a customer attribute, complete the properties that describe how it will be used, and how it appears in the store. The process is similar to creating a product attribute.

Manage Customer Attributes

To create a custom customer attribute:

1. On the Admin menu, select **Customers > Attributes > Manage Customer Attributes**.

   The list includes both system and custom attributes. System attributes cannot be changed or deleted.

2. In the upper-right corner, click the **Add New Attribute** button.

3. Complete the **Attribute Properties** as described in the Field Descriptions.

Attribute Properties

4. Complete the **Frontend Properties** as described in the Field Descriptions.

Frontend Properties

5. In the panel on the left, select **Manage Label / Options**.
6. In the Manage Titles section, enter a label to identify the field in the form. For multiple store views, you can enter a different label for each.

Manage Titles

7. The Manage Options section appears if the attribute input type has multiple options. Click the **Add Option** button. For each value, do the following:
   a. Enter the first value. For multiple views, you can enter a different value for each.
   b. If applicable, enter a number to determine the **Position** of the value in the list.
   c. If you want the value to be preselected, select the **Is Default** option.

Manage Options

8. When complete, click the **Save Attribute** button.

Field Descriptions

FIELD	DESCRIPTION
Attribute Properties	
Attribute Code	Specify the customer attribute name that will be used by the system. The name must be unique and must not contain any special characters, except an underscore, or any spaces.
Input Type	Specify the way the attribute appears to the customer in the store. Options include:

FIELD	DESCRIPTION	
	Text Field	Single line text field. Max and min size can be specified later.
	Text Area	Multi-line text input area. Max and min size can be specified later.
	Multiple Line	The number of input lines to be available for the customer in the frontend (cannot exceed 20 lines).
	Date	The system validates the customer's date attribute input.
	Dropdown	A drop-down list of options. To define the options, see: Manage Label / Options.
	Multiple Select	Multi-selectable list of options. When selected, the store administrator needs to create a number of attribute options on the Manage Label / Options tab.
	Yes/No	Binary/yes-no input field.
	File (attachment)	Allows files to be uploaded by the customer.
	Image File	Allows images to be uploaded by the customer.
Default Value	Specify a value that will be displayed in the attribute field in the frontend as a default one.	
Input Validation	Determines how the value entered by the customer is verified. The system verifies that the value entered in the attribute field corresponds to the type of attribute created. Input validation options available to the store administrator may vary depending on the attribute input type selected. Options include: None Alphanumeric Numeric Only Alpha Only URL	

FIELD	DESCRIPTION
	Email
Minimum Text Length	Determines the minimum number of characters that can be entered in the field. Applies to input types: Text Field Text Area Multiple Line
Maximum Text Length	Determines the maximum number of characters that can be entered in the field. Applies to input types: Text Field Text Area Multiple Line
Maximum File Size (bytes)	Determines the maximum size of an attachment file. Applies to input type: File.
File Extensions	List allowed extensions of files to be attached in the field. Separate multiple file extensions with a comma. Applies to input type: File.
Values Required	Determines if the attribute is a required field during data entry. The information cannot be saved until the required field is complete.
Input/Output Filter	Choose which filter will be applied to the attribute during the input and output operations. Filters can only be applied if the attribute is of Text Field, Text Area, or Multiple Line input type. The following options are available: None Strip HTML Tags Escape HTML Entries
Use in Customer Segment	Determines if the attribute can be used to define a customer segment for targeted marketing. Options include: Yes / No.
Frontend Properties	
Show on Frontend	Determines if the attribute is visible in the store. Options include: Yes / No.

FIELD	DESCRIPTION
Sort Order	Determines the order in which the attribute appears when listed with other custom attributes. In the form, system attributes appear first, followed by the custom attributes.
Forms to Use In	Choose the forms where the attribute will be used: Options include: Customer Checkout Register Customer Registration Customer Account Edit Admin Checkout

Customer Address Attributes

Customer address attributes created by the store administrator are used when the store needs to find out any additional address information from the customer. This can be an optional email address, Skype account, alternate phone number, county, etc.

The process for creating a custom address attribute is almost the same as creating a customer attribute. However, customer address attributes can be used in the following forms:

- Customer Registration Address
- Customer Account Address

Enterprise
EDITION

Sales & Orders

Chapter 48:

Managing Orders

The focus of this chapter is on what happens after a customers places an order, and the time that the order is delivered. You will learn how to offer shopping cart assistance, fulfill orders, print invoices, collect payment, process credit memos, manage returns, and more.

Topics in this chapter:

- Process Overview
- Order Stages
- Assisted Shopping
- Order Fulfillment
- Return Merchandise Authorization
- Store Credit and Refunds

Additional Resources

Consumer Attitudes on Shopping Cart Abandonment

Increasing Average Order Value

Process Overview

Order Submitted

During checkout, the customer reviews the order, agrees to the Terms and Conditions, and clicks the Place Order button. Customers receive a confirmation of their orders, with a link to their customer account.

Order “Pending"

Before payment is processed the status of a sales order is “Pending.” At this point, the order can still be canceled.

Payment Received

Depending on the payment method, you, may be notified when the transaction is authorized and in some cases, processed. The status of the invoice is now “Processing.”

Order Invoiced

Sometimes an order is invoiced before payment is received. In this example, the invoice is generated and submitted after the credit card payment has been authorized and processed. After the invoice is generated and submitted, a copy is sent by email to the customer.

Order “Processing”

When the customer logs into his account to check on the order, the status is still "Processing."

Order Shipped

The shipment is submitted, and packing slips printed. You ship the package, and the customer is notified by email. Congratulations! You’re in business.

Order Stages

The Sales menu lists transactions according to where they are in the order workflow. You might think of each of these as a possible stage in the life of an order.

Orders

When an order is created, either from the storefront or in the Admin, a sales order is created as a temporary record of the transaction. Sales orders can be seen from the Admin by selecting the Orders option from the Sales menu. Payment has not yet been processed and the order can still be canceled.

Invoices

An invoice is a record of the receipt of payment for an order. Creating an invoice converts the temporary sales order into a permanent record of an Order, which can no longer be canceled. Multiple invoices can be created for a single order, each containing as much or as few of the purchased products that you specify. Depending on the payment action, payment can be automatically captured when the invoice is generated.

Shipments

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.

RMA

A return merchandise authorization (RMA) can be granted to the purchaser of a product who has requested to return it for a refund or replacement. Typically the customer contacts the merchant to request a refund. If approved, a unique RMA number is assigned to identify the returned product.

Credit Memos

A credit memo is a record of a refund. A product cannot be refunded until it has been paid (which means that it has been invoiced). This means that you are not able to create a credit memo before an invoice has been created. The credit memo serves as a record of a refund, but it is not a record of the actual return of funds to the customer.

Transactions

The Transactions page lists all payment activity that has taken place between your store and a payment system, and provides access to more detailed information.

Archive

Your store can be configured to archive orders, invoices, shipments, and credit memos after a set number of days. Archiving orders on a regular basis improved performance and keeps your workspace free of unnecessary information, so you can focus on current activities.

Chapter 49:

Assisted Shopping

Customers sometimes need assistance to complete a purchase. Some customers like to shop online, but would rather the order by phone. While you're on the phone, the customer might decides to take advantage of a coupon. To complete the sale, you must know how to edit the contents of the shopping cart, apply the discount from the coupon, and complete the order from the Admin—all while the customer is on the phone. No problem!

You can offer immediate shopping cart assistance to any customer who has registered for an account with your store. The Manage Shopping Cart tool gives you the ability to edit the contents of the customer's shopping cart in real time, from the Admin of your store. Customer Service reps can see the contents of a customer's shopping cart while the customer is on the phone, and the changes can be seen by the customer immediately when the page is refreshed.

Topics in this chapter:

- Create a new order
- Create a customer account
- Update the contents of the customer's cart
- Apply a coupon code
- Transfer items from a wishlist
- Add gift wrap
- Manage a gift registry
- Apply reward points
- Manage invitations to events
- Retain shopping cart contents between visits
- Terms and conditions of sale

View Online Customers

You can check which customers are currently online and view their activity from the Admin panel.

To view online customers:

1. On the Admin menu,, select **Customers > Online Customers**.
2. In the list, click any record to open the customer information.

Online Customers

The Personal Information section shows the customer's current online status, and the date, time and location of the most recent session.

Customer Information

Update a Shopping Cart

To begin an assisted shopping session, the customer must be logged into the account dashboard, to make the information available. If the customer doesn't have an account, you can create one. What service!

Customer is Online

To offer assisted shopping:

1. On the Admin menu, select **Customers > Manage Customers**.
2. In the list, click to open the customer record in edit mode. To find a customer record in a hurry, enter the customer name in the filter control, and click the Search button.

Find Customer Record

When the customer record opens, the first thing you'll notice is that the Last Logged In value is "(Online)."

3. In the panel on the left, select **Shopping Cart**.
4. Click **Manage Shopping Cart** to enter assisted shopping mode. Then, do any of the following:

Manage Shopping Cart

To apply a coupon code:

1. In the Apply Coupon Code section, enter the code.
2. Click the **Apply** button.

To adjust the quantity ordered:

1. In the **Qty** column of the product to be adjusted, enter the correct amount.
2. Click the **Update Items and Qty's** button.

Apply Coupon and Update Qty

To add products to the shopping cart:

1. Click to expand the **Products** section. In the **Qty to Add** column, enter the quantity of the product the customer wants to order.
2. If the product is configurable, click the **Configure** link. Then, select the options the customer wants, and click the **OK** button.

Configure Product Options

To add a product by SKU:

1. Click to expand the **Add to Shopping Cart by SKU** section.
2. Enter the **SKU** and **Qty** to be ordered.

To upload multiple products by SKU:

1. Click the **Choose File** button. The file must contain only the columns "sku" and "qty" in the header.
2. Select the file to be uploaded from your directory.

Upload SKUs

To transfer products from a wishlist:

1. Click to expand the Wishlist section.
2. By default, it is set to transfer all items in the wishlist. If there are multiple items, select the checkbox of the items that you do not want to transfer, and set **Qty to Add** to 0.

Add to Cart from Wishlist

Customer service reps can remove items from a cart by setting the quantity to 0 and updating the cart. However, only the customer can move items from the cart to the wishlist or to the product compare list.

3. Follow the same procedure to add items from the remaining sections:
   - Products in Comparison List
   - Recently Compared Products
   - Recently Viewed Products
   - Last ordered items
4. When complete, click the **Add Selected Products to the Shopping Cart** button.
5. Ask the customer to press F5 to refresh the page, so the products appear in the cart.

   At this point, the customer can continue shopping and checkout unassisted, or have the customer service representative create the order.
6. To create an order, click the **Create Order** button, and follow the normal process to create an order for the customer.

Create an Order

For registered customers who need assistance, you can create an entire order directly from the Admin. The Create New Order form includes all the information that is needed to complete the normal checkout process, with activity summaries from the customer's account dashboard.

Step 1: Initiate the Order

For existing customers, new orders can be created both from the Manage Customer page and from the Sales Order page. The Sales Order page can also be used to open accounts for new customers.

Method 1: Create Order from Existing Account

1. On the Admin menu, select **Customers > Manage Customers**.
2. Find the customer in the list and click to open the record.
3. Click the **Create Order** button, and do the following:
   a. Complete the order information as you would when going through checkout.
   b. To add products from the Current Activities section, find the product in the list and click the **Add to Order** checkbox. Then, click the **Update Changes** button.
   c. To add products from the catalog, click the **Add Products** link. Then, select the checkbox of each product to be added to the cart, and the **Qty** to be purchased.
   d. If the product has multiple options, click the **Configure** button. Complete the options as needed, and click the **OK** button. Then, click the **Add Selected Product(s) to Order** link to update the cart.
   e. To override the price of an item, select the **Custom Price** checkbox. Then, enter the new price in the box below. Click the **Update Items and Qty's** button to update the cart totals.
   f. Complete the following sections, as needed for the order:
      - Apply Coupon Codes
      - Gift Cards
      - Payment Method
      - Shipping Method
   g. In the Order Comments section, enter any comments that you want to accompany the order. To include the comments in the email notification that is sent to the customer, click the **Order Comments** button.
   h. The **Email Order Confirmation** checkbox is selected by default. If you don't want to send an email confirmation to the customer, clear the checkbox.

4. When complete, click the **Submit Order** button.

Method 2: Create Order from Sales

1. On the Admin menu, select **Sales > Orders**.
2. Click the **Create New Order** button.
3. Do one of the following:
   - For registered customers, find the customer in the list and click to open the record.
   - For unregistered customers, click the **Create New Customer** button.
4. Complete the order information as you would if going through the checkout process. For a new customer account, complete the following sections:
   - Account Information
   - Billing Address
   - Shipping Address

Step 2: Add Products to the Order

Products can be added to the order by selecting each item from the catalog, or by transferring the information from a previous order, the customer's wishlist, recently viewed products, or other activities.

1. Click to the **Add Products** button.
2. Click the **Reset Filter** button to list all products. Then, use the filter controls as needed to find the products to be added. Then, click the **Search** button.
3. Select the checkbox of each product to be added to the cart and if applicable, enter the **Qty** to be purchased.

   If the product has multiple options, click the **Configure** link. Complete the options as needed and click the **OK** button.
4. Click the **Add Selected Product(s) to Shopping Cart** button to update the cart. The current content of the cart appear in the Items Ordered section.
5. To override the price of an item, select the **Custom Price** checkbox. Then, enter the new price in the box below. Click the **Update Items and Qty's** button to update the cart totals.
6. Complete the following sections, as applicable to the order:
   - Apply Coupon Codes
   - Gift Cards
   - Payment Method
   - Shipping Method

7. When complete, click the **Submit Order** button.

Update an Order

After a customer has placed an order, it is sometimes necessary to edit the order, place it on hold, or cancel the order entirely.

When you make changes to an order, the original order is canceled and a new order is generated. You can, however, make changes to the billing or shipping address without generating a new order.

To edit an order:

1. On the Admin menu, select **Sales > Orders**.
2. Select the pending order that you want to edit.
3. Click the **Edit** button at the top of the screen. When prompted, click **OK** to continue.
4. Make the necessary changes to the order. For example:
   - To change the billing address, click **Edit** in the Billing Address section, and change the address.
   - To change the shipping address, click **Edit** in the Shipping Address section, and change the address.
5. When complete, do one of the following:
   - Click **Save** to save changes made to the billing or shipping address.
   - Click **Submit Order** to save changes, and reprocess the order.

To add gift options:

1. On the Admin menu, select **Sales > Orders**.
2. Click to open the pending order. Then, click the **Edit** button at the top of the screen. When prompted, click **OK** to continue.
3. In the **Items Ordered** section, click the **Gift Options** link for the item you want to edit.

Adding Gift Options

4. Complete the gift options, and click the **OK** button.

To place an order on hold:

If the customer's preferred method of payment is not available, or if the item is temporarily out of stock, you can put the order on hold.

1. On the Admin menu, select **Sales > Orders**.
2. In the list, find the pending order that you want to place on hold. Then, click the **View** button.
3. Click **Hold** to place the order on hold.

   To return the order to an active state, repeat the process and click **Unhold**.

To cancel an order:

Canceling an order removes it from the list of pending orders.

1. On the Admin menu, select **Sales > Orders**.
2. Find the pending order to cancel, and click the **Edit** link at the end of the row.
3. In the upper-right corner, click the **Cancel** button to remove this order.

Order by SKU

Both customers and store administrators can add products to shopping carts and orders by specifying SKU numbers. Customers can use the Order by SKU widget, or order by SKU from their accounts.

Order by SKU Widget

To order by SKU from the store:

1. In the Order by SKU block, enter the **SKU** number and **Qty** you want to order.
2. To add another item, click the **Add Row** button.
3. Click the **Add to Cart** button.

Order by SKU Setup

You can set up Order by SKU to be available to everyone, or to only specific customer groups.

To enable Order by SKU in customer accounts:

1. On the Admin menu, select **System> Configuration**. Then in the panel on the left, under Sales, select **Sales**. Then, click to expand the **Order by SKU Settings** section.

Order by SKU Settings

2. In the upper-left corner, set the **Current Configuration Scope** to your website.
3. Set **Enable Order by SKU in my Account on Frontend** to one of the following:

Yes, for Everyone	The Order by SKU tab appears on the My Account page for all logged in customers.
Yes, for Specified Customer Groups	The field for specifying Customer Group(s) appears once you select the option. The Order by SKU tab appears on the My Account page only for logged in customers who belong to the specified Customer Group(s).
No	The Order by SKU tab does not appear in the customer account.

4. When complete, click the **Save Config** button.

Order by SKU

Order by SKU from Admin

From the Admin, Order by SKU is always available and does not require configuration. An administrator can specify individual SKU values or load a .csv file with a list of SKUs. Products can be added by SKUs from Create New Order and the Shopping Cart.

Items Ordered

To add products by SKU to an order:

1. On the Admin menu, select **Sales > Orders**. In the list, click to open the order in edit mode.
2. At the top of the order, click the **Edit** button.
3. In the Items Ordered section, click the **Add Products by SKU** button.
4. Click **Add Products by SKU** button. Then, do the following:
5. In the Add to Order by SKU section, use either of the following methods:

Method 1: Enter Products Individually

1. Enter the **SKU** and **Qty** of the item to be ordered.
2. To add another, click the **Add** button.

Method 2: Upload Products from a CSV File

1. Prepare a csv file with the order data. The file can be created in a spreadsheet with the columns “sku” and “qty.” Then, save the data as a csv file.
2. Click the **Choose File** button. Then, select the csv file that you prepared with the order data.
3. When complete, click the **Add to Order** button.

To add products by SKU to a shopping cart:

1. On the Admin menu, select **Customers > Manage Customers**.
2. Find the customer in the list, and click to open the record in edit mode.
3. Click the **Manage Shopping Cart** button.
4. Click to expand the **Add to Shopping Cart by SKU** section. Then, follow the same process to add the items to the cart.

Add to Shopping Cart by SKU

Upload Orders by SKU

To upload order data by SKU, the header row must contain “sku” and “qty.” Any other columns are ignored. Then, save the data as a .csv file.

	A	B
1	sku	qty
2	ace002	1
3	ace001	1
4	ace000	1
5		

Order by SKU Data to Upload

Files with SKUs are processed according the following rules:

- A row where the SKU value is empty is ignored.
- A row where the SKU value is not empty, and the QTY value is empty, invalid, or equal to “0,” is processed and the corresponding product is placed in the “Products requiring attention” section.

Troubleshooting

If some products cannot be added on any reason (out of stock, require configuring, or some other reason), then they are listed in a separate section as “Products requiring attention.” The problem might be as simple as mistake in the SKU. Correct the problem, and try to add the products again. If product addition fails again, the products still remain listed in the Products Requiring Attention section. You can continue with the order or shopping cart assistance. The Products Requiring Attention section is stored for the duration of the session. If you delete the failed products listed, the section disappears.

The following conditions might prevent a product from being added successfully. The corresponding SKUs appear in the “Products requiring attention” section.

- A product is composite (a product of configurable, grouped, bundle, gift card types or a product with custom options). These products can be added after configuring them.
- No product with a specified SKU is found in the catalog. The product cannot be added.
- A product is assigned to another website. The product cannot be added.
- A product is disabled or out of stock (in this case a product cannot be added to a shopping cart, but can be added to an order).

Create a Customer Account

Customers usually create their own accounts from your store. However, you can also create customer accounts directly from the Admin, which is useful when customers order by phone.

To create a new customer account:

1. On the Admin menu, select **Customers > Manage Customers**.
2. Click the **Add New** button.
3. In the **Associate to Website** list, select one of the following:
   - Admin
   - Main Website

   You can associate a customer with the Admin website to require that orders are placed only from the store Admin. Customers associated with the Admin website cannot log in to their accounts from the store.
4. Assign the customer to a **Customer Group**.
5. Complete the remaining customer information.
6. In the **Password Management** section, do one of the following
   - Manually assign a password.
   - Select the **Send auto-generated password** checkbox. The new password is generated after the customer information is saved.
7. When complete, click the **Save Customer** button.

To add a new address to a customer account:

1. On the Admin menu, select **Customers > Manage Customers**. Then, click to open the customer record.
2. In the panel on the left, select **Addresses**. Then, do the following:
   a. To add a new address, click the **Add New Address** and complete the information.
   b. To assign a **Default Address** check either the **Default Billing Address** or **Default Shipping Address** as needed.
3. When complete, click the **Save Customer** button.

Field Descriptions

FIELD	DESCRIPTION
Associate to Website	Identifies the website associated with the customer account.
Group	Identifies the customer group to which the customer belongs. Select the checkbox to disable automatic group change based on VAT.
Prefix	If used, the prefix that is associated with the customers name. For example: Mr, Mrs. or Dr.
First Name	The customer's first name.
Middle Name / Initial	The customer's middle name or middle initial.
Last Name	The customer's last name.
Suffix	If used, the suffix that is associated with the customer's name. For example: Jr.,Sr., or III.
Email	The customer's email address.
Date of Birth	The customer's date of birth.
Tax / VAT Number	The customer's Tax or Value Added Tax number, if applicable.
Gender	Identifies the customer's gender as Male or Female.
Send Welcome Email	Select the checkbox if you want the system to send the customer a welcome email message.
Send From	If you have multiple stores, select the store from which the welcome message will be sent.

Update a Customer Account

The panel on the left of the Customer Information page includes information about customer activity, such as when the customer last logged in and out, addresses, order statistics, recent orders, shopping cart contents, product reviews, newsletter subscriptions, and so on.

Customer Information

To view customer information:

1. On the Admin menu, select **Customers > Manage Customers**.

   The Manage Customers page lists all customers who have opened an account with your store or were added by the administrator .

Manage Customers Page

2. Click the **Edit** link to open a customer record.

Manage Customer Activities

The Customer's Current Activities section of the sales order gives you a snapshot of items in the shopping cart, wishlists, gift registries, as well as other activities.

- Wishlists
- Gift Options
- Gift Registries
- Reward Points
- Invitations

Wishlists

From the Admin, the items from all customer wishlists appear on all pages where Wishlist items are usually available, such as when creating a new order or managing shopping cart pages. The detail from all existing wishes is included, even if multiple wishlists are disabled.

Wishlist Items in Customer Order

Gift Options

Gift options can be added to orders that are created from the Admin. When creating the order, the gift options for each order item can be added using the Gift Options link displayed under product name in the Items Ordered block. When you click the link, a pop-up window opens, where gift wrapping and/or a gift message can be added. If gift wrapping is selected for a product, its price is displayed under the product name.

Gift options for the entire order are available in the Gift Options block of the Create New Order page. The gift wrapping and the printed card prices for the order and separate items are represented as individual lines in the order totals.

> Gift options from original orders are not preserved for reorders.

Gift Registries

The store administrator has access to gift registry records to monitor them, make changes, share gift registries, or delete them by request of the gift registry owner. You can add items from the shopping cart to a gift registry while the customer is on the phone.

Manage Customer Gift Registry

To view a customer's gift registry:

1. On the Admin menu, select **Customers > Manage Customers**. Then in the list, click to open the customer record.
2. In the panel on the left, select **Gift Registry**.

3. Click the gift registry you want to see.

To manage items in a customer's gift registry:

1. From the customer's gift registry list, click to open the gift registry you want to manage.
2. To add items from the customer's shopping cart, do the following:
   a. In the Shopping Cart Items section, locate the item that is to be added to the gift registry, and select the checkbox.
   b. Set the **Actions** control to "Add to Gift Registry." Then, click the **Submit** button.

Shopping Cart Items

3. To change quantities in the gift registry, enter the new quantity in the Gift Registry Items section, and click the **Update Items and Qtys** button.

Gift Registry Items

4. To delete an item do the following:
   a. Make either of the following changes:
      - Set **Requested Quantity** to zero.
      - In the list of gift registry items, set the **Actions** control to "Remove Item."
   b. Click the **Update Items and Qty's** button.

To share a customer's gift registry:

1. From the customer's gift registry list, click to open the gift registry you want to manage.
2. In the Sharing Information section, do the following:
   a. In the **Emails** field, enter the email addresses provided by the gift registry owner. Separate each email address with a comma.
   b. Set **Send From** to the store view that is used to send email invitations to gift registry participants.

c. (Optional) Enter a **Message** to include in the standard email that is sent to gift registry participants.

Gift Registry Sharing Information

3. When complete, click the **Share Gift Registry** button.

   Recipients will receive an email invitation with a link to the gift registry.

To delete a customer's gift registry:

1. From the customer's gift registry list, click to open the gift registry you want to manage.
2. Click the **Delete Registry** button to permanently delete the gift registry.

> **Important!** This action cannot be reversed.

Reward Points

Reward point balances can be managed by admin users per customer. If enabled for the storefront, customers can view the details of their points balance from the Reward Points tab in their account dashboard. It displays the balance, current exchange rate, maximum and minimum limits, subscription status (with ability to edit), and (if enabled) balance history. There is also a link to the Rewards Points landing page.

To apply reward points to a customer balance:

1. On the Admin menu, select **Customers > Manage Customers**.
2. Click to open the customer record. Then, in the panel on the left, select **Reward Points**.

   From this view, the admin user can view and edit (add to or subtract from) the customer's points balance per website, and edit the customer's email notification status. Additionally, this view includes a detailed history of each accrual, redemption, and expiration of points, including timestamp, exchange rate, and reason for balance change.

Invitations

Invitations can be associated with private sales and events, and are designed to invite people to register for an account with your store. From the Admin, you can view invitations and send new ones, as well. If a recipient responds to the invitation and opens an account, the customer is assigned to the referring customer group.

The status of each invitation, the date sent, and the related customer group is shown. If an invitation is sent to multiple recipients, a separate record is created for each.

Manage Invitations

To create a new invitation:

1. On the Admin menu, select **Customers > Invitations**.
2. In the upper-right corner, click the **Add Invitations** link. Then, do the following:
   a. In the first box, **Enter Each Email on a New Line**. There is no limit to the number of recipients.
   b. In the **Message** box, enter the text of the message.

Invitation Information

3. Set **Send From** to the store view that is associated with the event.

4. Set **Invitee Group** to the customer group that is associated with the event. The customer group of the person who is putting on the event is typically assigned to any invitee who opens an account with the store.

   This setting overrides the invitation configuration. If the invitee email address is already associated with a store account, but assigned to a different customer group, the invitation will not be sent. To learn more, see Event Invitation Configuration.

5. When complete, click the **Save** button.

   The invitation is sent and the record appears in the Manage Invitations list.

To resend invitations:

1. In the Manage Invitations list, select the checkbox of each invitation that you want to resend.
2. Set the **Actions** control to "Send Selected."
3. Click the **Submit** button.

To view past invitations:

1. Click to open any record in the Manage Invitations list.

View Invitation

2. To view the page that is linked to the invitation, click the **Invitation URL** link.

Invitation Page

To view the invitation history:

In the panel on the left, select **Status History**.

Status History

Persistent Shopping Cart

A persistent shopping cart keeps track of unpurchased items which are left in the cart, and saves the information for the customer's next visit. Customers who are "remembered" can have the contents of their shopping carts restored the next time they visit your store.

Using a persistent shopping cart can help reduce the number of abandoned shopping carts and increase sales. It is important to understand that the persistent shopping cart does not expose sensitive account information at any time. While the persistent shopping cart is use, both registered customers and guest shoppers are required to either log in to an existing account or create a new account before going through checkout. For guest shoppers, a persistent shopping cart is the only way to retrieve information from a previous session.

Types of Cookies

To use the persistent shopping cart, the customer's browser must be set to allow cookies. During operation, the following cookies are used:

Session Cookie

A short-term session cookie exists for the duration of a single visit to your site, and expires when the customer leaves, or after a set period of time.

Persistent Cookie

A long-term persistent cookie continues in existence after the end of the session, and saves a record of the customers' shopping contents for future reference.

Persistent Cart Workflow

When Persistent Shopping Cart is enabled, the workflow depends on the values of the "Enable Remember Me" and "Clear Persistence on Log Out" settings, the customer's decision to select or clear the "Remember Me" checkbox, and when the persistent cookie is cleared.

When a persistent cookie is applied, a Not %Jane Smith%? link appears in the page header, to give the customer the ability to terminate the persistent session and start working as a guest, or log in as a different customer.

The system retains a record of the shopping cart contents, even if the customer later uses different devices to shop in your store. For example, a customer can add an item to the shopping cart from a laptop, edit the cart contents from a desktop computer, add more items from a mobile device, and complete the checkout process from a tablet.

There is a separate independent persistent cookie for each browser. If the customer uses multiple browsers while visiting your store during a single, persistent session, any changes made in one browser will be reflected in any other browser when the page is refreshed. While the persistent shopping cart is enabled, your store creates and maintains a separate persistent cookie for each browser that is used by a customer to log in or create an account.

Remember Me

The "Remember Me" checkbox on the Login page lets customers choose to save the contents of their shopping carts.

Yes

If "Remember Me" is selected, a persistent cookie is created, and the contents of the shopping cart is saved for the customer's next logged-in session.

No

If "Remember Me" is not selected or cleared, a persistent cookie is not created, and the shopping cart information is not saved for the next customer's logged-in session.

Continue Persistence After Logout (No)

When Clear Persistence on Log Out is set to "No," the following scenarios apply:

No

When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.

No

When the customer logs out, the session cookie is deleted, but the persistent cookie remains in effect. The next time the customer logs in, the cart items will be restored, or added to any new items which have been placed in the cart.

No

If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

Clear Persistence on Logout (Yes)

When Clear Persistence on Log Out is set to "Yes," the following scenarios apply:

Yes

When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.

Yes

When the customer logs out, both cookies are deleted.

Yes

If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

Possible Scenarios

If Persist Shopping Cart is set to "Yes," the following situation is possible:

- Customer A in the persistent session adds products to the cart and goes away to make a cup of coffee.
- Customer B takes his place, and does not click the Not %Customer A% link. Customer B is actually working with Customer A's shopping cart. If he or she goes to checkout and logs in as Customer B, the shopping cart content of Customer A (modified by B or not) is added to B's shopping cart.
- After B submits the order, the ordered products are removed from A's shopping cart.

Setting Combinations

SETTINGS	EFFECT
Enable Remember Me = "No" Clear Persistence on Log Out = any value	The Remember me checkbox is not available on the login and registration page. The persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = any value Remember Me (not selected)	The session cookie is applied as usual; the persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "Yes" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, both cookies are deleted. If a customer does not log in, but the session cookie expires, the persistent cookie is still used. Apart from logging out, the persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "No" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, the session cookie is deleted, the persistent session continues. The persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.

Persistent Cart Setup

During the setup of a persistent shopping cart, you can specify the lifetime of the cookies, and which options you want to make available for various customer activities.

To set up a persistent shopping cart:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Persistent Shopping Cart**. Then, click to expand the **General Options** section.
3. To enable the persistent shopping cart and to display additional configuration options, set **Enable Persistence** to "Yes."

Persistent Shopping Cart

4. Do the following:
   a. Set **Persistence Lifetime (seconds)** to the length of time that you want the persistent cookie to last. The default value 31,536,000 seconds is equal to one year, and is the maximum time allowed.
   b. Set **Enable "Remember Me"** to one of the following:

Yes	Displays the "Remember Me" checkbox on the Login page of your store, so customers can choose to save their shopping cart information.
No	Persistence can still be enabled, but customers are not given the option to choose if they want to save their information.

   c. To preselect the "Remember Me" checkbox, set **Remember Me Default Value** to "Yes."
   d. Set **Clear Persistence on Log Out** to one of the following:

Yes	The shopping cart is cleared when a registered customer logs out.
No	The shopping cart is saved when a registered customer logs out.

> If the session cookie expires while the customer is still logged in, the persistent cookie remains in use.

e. Set **Persist Shopping Cart** to one of the following:

Yes	If the session cookie expires, the persistent cookie is preserved. If a guest shopper later logs in or creates a new account, the shopping cart is restored.
No	The shopping cart is not preserved after the session cookie expires.

f. Complete the persistence settings for the following features:

- Wishlist
- Recently Ordered Items
- Currently Compared Products
- Comparison History
- Recently Viewed Products
- Customer Group Membership and Segmentation

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable Persistence	Website	Determines if the persistence is enabled.
Persistence Lifetime (seconds)	Website	Defines the lifetime of the persistent cookie in seconds. Maximum allowed value is 3153600000 seconds (100 years).
Enable “Remember Me”	Website	Defines whether the Remember Me checkbox appears on the login and registration pages of the store. Options include: Yes — Displays the Remember Me checkbox. No — Does not display the Remember Me checkbox, and the persistent

FIELD	SCOPE	DESCRIPTION
		cookie is used only for customers who already have it.
"Remember Me" Default Value	Website	Defines the default state for the Remember Me checkbox.
Clear Persistence on Log Out	Website	Defines whether the persistent cookie is deleted when a store customer logs out. No matter how Clear Persistence on Log Out is configured, if a customer does not log out, but the session cookie expires, the persistent cookie is still used.
Persist Shopping Cart	Website	Defines whether using the persistent cookie gives access to the shopping cart data of the correspondent account. Options include: Yes — The shopping cart contents are saved after the session ends. No — The shopping cart contents are not saved after the session ends.
Persist Wishlist	Website	Determines if using the persistent cookie gives access to the wishlist data of the corresponding account. As guest customers do not have wishlists, if Persist Wishlist is set to No, a customer with only the persistent cookie applied will need to log in to access the wishilist.
Persist Recently Ordered Items	Website	Defines whether using the persistent cookie gives access to the Recently Ordered Items block data of the corresponding account.
Persist Currently Compared Products	Website	Defines whether using the persistent cookie gives access to the Currently Compared Products block data of the corresponding account.
Persist Comparison History	Website	Defines whether using the persistent cookie gives access to the Comparison History block data of the corresponding account.

FIELD	SCOPE	DESCRIPTION
Persist Recently Viewed Products	Website	Defines whether using the persistent cookie gives access to the Recently Viewed Products block data of the corresponding account.
Persist Customer Group Membership and Segmentation	Website	Defines whether using the persistent cookie enables applying customer group rules (tier pricing, catalog price rules, shopping cart price rules) and segment rules (related to displaying banners) of the corresponding account.

Terms and Conditions

When Terms and Conditions is enabled, customers must select a checkbox to verify that they agree to the terms and conditions of the sale. The Terms and Conditions message and checkbox appear during Order Review between the Totals section and the Place Order button. The transaction cannot be finalized until the customer selects the checkbox to agree to the terms and conditions of the sale.

Terms and Conditions at Checkout

Step 1: Enable Terms and Conditions

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Checkout**. Then, click to expand the **Checkout Options** section.

3. Make sure that **Enable Onepage Checkout** is set to "Yes." Otherwise, the Terms and Conditions checkbox will not appear during checkout.
4. To display the terms and conditions checkbox during checkout, set **Enable Terms and Conditions** to "Yes."
5. When complete, click the **Save Config** button.

Checkout Options

Step 2: Add Your Terms and Conditions

1. On the Admin menu, select **Sales > Terms and conditions**.
2. In the upper-right corner, click the **Add New Condition** button.
3. In the Terms and Conditions Information section, complete the following:

Terms and Conditions Information

a. Enter the **Condition Name**. The name is for internal reference only.
b. Set **Status** to "Enabled."
c. Set **Show Content as** to one of the following:

Text	Displays the terms and conditions content as unformatted text.
HTML	Displays the content as HTML.

4. Identify the **Store View** where the Terms and Conditions will appear.
5. Enter the **Checkbox Text** that you want to appear as a label with the checkbox. For example, you could use “I understand and accept these terms and conditions of the sale.”
6. In the **Content** field, enter the full text of the terms and conditions of the sale.
7. (Optional) Enter the **Content Height (css)** in pixels, to determine the height of the text box where the terms and conditions statement appears during checkout. For example, to make the text box one inch high on a 96 dpi display, enter 96.
8. When complete, click the **Save Condition** button.

Chapter 50:

Order Fulfillment

When an order is placed, a sales order is created as a temporary record of the transaction. In the Orders list, sales orders are shown with a status of "Pending," and can be canceled at any time until the payment is processed. After payment confirmed, the order can be invoiced and shipped.

Topics in this chapter:

- Order Workflow
- Order Status
- Invoice an Order
- Ship an Order
- Archive Orders

Place Order

Order Workflow

Order Workflow

Order Status

All orders have an order status that is associated with a stage in the order processing workflow. You can see the status of an order by clicking the control at the top of the Status column.

Order Status

Your store has a set of predefined order status and order state settings. The state describes the position of an order in the workflow.

ORDER STATUS	ORDER STATE
Canceled	New
Canceled Ogone	Pending Payment
Closed	Processing
Complete	Complete
Declined Ogone	Closed
On Hold	Canceled
Payment Review	On Hold
Pending	Payment Review
Pending Ogone	
Pending Payment	
Pending PayPal	
Processed Ogone Payment	
Processing	
Processing Ogone Payment	
Suspected Fraud	
Waiting Authorization	

Custom Order Status

In addition to the preset order status values, you can create custom order status values of your own, assign order statuses to order states, and set a default order status for order states. For example, you might need a custom order status for orders, such as “packaging” or “backordered,” or for a status that is specific to your needs. You can create a descriptive name for the custom status, and assign it to the associated order state in the workflow.

> Only default custom order status values are used in the order workflow. Custom status values that are not set as default are available only in the comments section of the order.

List of Order Statuses

To create a custom order status:

1. On the Admin menu, select **System > Order Statuses**.
2. In the upper-right corner, click the **Create New Status** button.
3. In the Order Status Information section, do the following:
   a. Enter a **Status Code**. This value is for internal use only. The first character must be a letter (a-z), and the rest can be any combination of letters and numbers (0-9). You can use the underscore character instead of a space.
   b. Enter a **Status Label** to identify the status setting in both the Admin and store.
4. In the Store View Specific Labels section, enter any labels that you need for different store views and languages.
5. When complete, click the **Save Status** button.

   The new order status now appears in the Order Statuses list.

To assign an order status to a state:

1. On the Order Statuses page, click the **Assign Status to State** button.
2. In the Assignment Information section, do the following:
   a. Select the **Order Status** that you want to assign. They are listed by status label.
   b. Select the **Order State** that represents where the order status belongs in the workflow.
   c. To make this status the default for the order state, select the **Use Order Status as Default** checkbox.

Assign Status to State

3. When complete, click the **Save Status Assignment** button.

To edit an existing order status:

1. On the Order Statuses page, click to open the status record in edit mode.
2. Update the status labels as needed.
3. When complete, click the **Save Status** button.

To remove an order status from an assigned state:

1. On the Order Statuses page, find the order status record that you want to unassign.
2. In the Action column on the far right of the row, click the **Unassign** link.

   A message appears at the top of the workspace that the order status has been unassigned. Although the order status label still appears in the list, it is no longer assigned to a state. Order statuses cannot be deleted.

> A status cannot be unassigned from a state if the status is currently in use. An error message similar to the following appears: Status "Test" cannot be unassigned. It is used in 3 payment method configuration(s): Check / Money order [Admin, Main Website, Private Sales Website]

Invoice an Order

An invoice is a record of the receipt of payment for an order. Creating an invoice for an order converts the temporary sales order into a permanent record of the order, which cannot be canceled. Multiple invoices can be created for a single order, each containing as much or as few of the purchased products that you specify.

To invoice an order:

1. On the Admin menu, select **Sales > Orders**.
2. In the Status column of the row with the Pending order, click **View**.
3. Click the **Invoice** button and scroll down to the Shipping Information if you would like to add a tracking number.

   For orders with online payment methods where you have chosen "Authorize and Capture," this button does not appear. A new invoice page looks very similar to a completed order page, with some additional fields that can be edited.

4. Click the **Add Tracking Number** button and do the following:
   a. Select a shipping **Carrier**.
   b. The **Title** is entered automatically when you select the carrier. You can edit the title, if needed.
   c. Enter the **Tracking Number** for the order.
5. If your items are ready to ship, select the **Create Shipment** checkbox to also create a packing slip for the shipment.
6. Under the Invoice History menu, in the Invoice Comments section, complete the comments as needed. Then, in the Invoice Totals section, select the **Append Comments** checkbox to add the comments to the invoice.
7. Select the **Email Copy of Invoice** checkbox to send a copy of the invoice to your customer.
8. Click the **Submit Invoice** button to process the invoice and capture the sale.

   If your store requires that you ship before invoicing, click the Ship button, complete the shipping information and submit your shipment. When that is complete, finish the invoicing steps.

To print an invoice:

1. On the Admin menu, select **Sales > Invoices.**
2. In the **Invoices** list, find the invoice that you want to print. Click the checkbox in the first column to select the invoice. To print multiple invoices, check the checkbox of each invoice to be printed.
3. In the **Actions** list box, select **PDF Invoices**. Then, click the **Submit** button to generate the PDF and display the document in a new window.
4. To view the invoice from the Invoice list, click the **View** link on the far right of the row. To print the invoice, click the **Print** button.
5. After the file has been downloaded and saved to your computer, you can open and print the document with Adobe Reader.

   You can print an invoice for a single order, or for multiple invoices as a batch, or group. However, before an invoice can be printed, the invoice must first be generated for the order. To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.

Payment Actions

PAYMENT ACTION	DESCRIPTION
Capture Online	Upon invoice submission, the system captures the payment from the third-party payment gateway. You have the ability to create a credit memo and void the invoice.
Capture Offline	Upon invoice submission, the system does not capture the payment. It is assumed that the payment is captured directly through the gateway, and you no longer have the option to capture this payment through Magento. You have the ability to create a credit memo, but you do not have the option to void the invoice. (Even though the order used an online payment, the invoice is essentially an offline invoice.)
Not Capture	When the invoice is submitted, the system does not capture the payment. It is assumed that you will capture the payment through Magento at a later date. There is a Capture button in the completed invoice. Before capturing, you are able to cancel the invoice. After capturing you are able to create a credit memo and void the invoice. Do not use “Not Capture” unless you are certain that you will capture the payment through Magento at a later date. You will not be able to create a credit memo until the payment has been captured with the Capture button.

Ship an Order

The invoice for a single order, or for a batch of orders, can be generated from the Admin. However, some payment methods generate the invoice automatically when payment is authorized and captured. The payment method determines which invoicing options can be used for the order.

The shipment record contains a detailed history of the fulfillment process associated with the order. Partial shipments can be made until the order is fulfilled.

You can easily create shipping labels for new and existing orders from the Admin of your store. To create shipping labels, you must first set up your shipping carrier account to support labels. To learn more, see: Shipping Labels.

To generate an invoice with packing slip:

1. On the Admin menu, select **Sales > Orders**.
2. In the Orders list, select the checkbox of the order to be invoiced. Then, do the following:
   a. In the Action column, click **View**.
   b. In the upper-right corner, click the **Invoice** button. The new invoice page looks similar to a completed order page, with additional fields that can be edited.

   > The Invoice button does not appear for orders placed with the "Authorize and Capture" payment action.

3. If the items are ready to ship, you can create a packing slip for the shipment at the same time you create the invoice. To create a packing slip, do the following:
   a. Select the **Create Shipment** checkbox in the Shipping Information section.
   b. To include a tracking number, click the **Add Tracking Number** button and enter the **Carrier**, **Title**, and **Number**.
   c. In the Items to Invoice section, you can specify if the invoice is for the entire order, or for specific items or quantities.
4. If an online payment method was used for the order, select the appropriate option from the Amount list box.
5. To notify customers by email when an invoice is generated, do the following:
   a. Select the **Email Copy of Invoice** checkbox.
   b. Enter any comments you would like to include in the **Invoice Comments** field. To include the comments in the notification email, select the **Append Comments** checkbox.

c. To send a copy of the invoice email to yourself, enter your email address in the **Send Invoice Email Copy To** field. The status of an invoice email appears next to the invoice number of the completed invoice as either sent or not sent.

6. When complete, click the **Submit Invoice** button at the bottom of the page. The status of the order changes from "Pending" to "Complete."

To view the shipment detail:

1. On the Admin menu, select **Sales > Shipments**.
2. Find the shipment in the list, and click to open the record.

Packing Slips

A packing slip is a sales document that accompanies shipments sent from your store, and lists each item included in the package. You can print a packing slip for a single order, or print multiple packing slips as a batch, or group. However, before a packing slip can be printed, it must first be created for the order.

Packing Slip

To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.

To print packing slips:

1. On the Admin menu, select **Sales > Shipments**.

Method 1: Print Single Packing Slip from Shipment

1. In the Shipments list, open the record that needs a packing slip.
2. In the upper-right corner of the shipment page, click the **Print** button. Look for the download indicator in the lower-left corner of your browser window.

Method 2: Print Multiple Packing Slips

1. In the Shipments list, select the checkbox of each shipment record that needs a packing slip.
2. In the upper-right corner, set the **Actions** control to "PDFpackingslips" and click the **Submit** button.

Printing Multiple Packing Slips

2. Do one of the following:
   - To save the document, click the **Save** button. Then, follow the prompts to save the file to your computer.When the download is complete, open the PDF in Adobe Reader, and print the document.
   - To view the document in Adobe Reader, click the **Open** button. From here, you can either print the packing slip or save it to your computer.

PDF Printouts

The Order ID can be included in the sales documents that accompany an order. Follow the instructions below to include the Order ID in the header of invoices, packing slips, and credit memos.

To configure PDF printouts:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **PDF Print-outs**.
3. To include the order ID in the header of each document, click to expand each section. Then, set **Display Order ID in Header**to "Yes" for each of the following:
   - Invoice
   - Shipment
   - Credit Memo
4. When complete, click the **Save Config** button.

PDF Print-outs

Customer Address Templates

The store administrator can modify address templates to control the format of the following customer billing and shipping addresses:

- Customer's billing and shipping addresses in the customer's address
- Shipping and billing addresses from customer's address book (available during the shopping cart checkout)
- Addresses in invoices, shipments, and refunds (printed in PDF files)

Example 1: Text Templates

For Text, Text One Line, HTML and PDF Address Templates

```
{{depend address attribute code}} a space, a character, or UI label
{{/depend}};

{{if address attribute code}}{{var address attribute code}} a space, a
character, or UI label

{{/if}}
```

Example 2: JavaScript Template

For JavaScript Address Template

```
#{address attribute code} or User Interface label #{address attribute code}
```

Address Templates

To change the order of address fields:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Customer Configuration**.

   The section includes a separate set of formatting instructions for each of the following:

   - Text
   - Text One Line
   - HTML
   - PDF
   - JavaScript Template
3. Edit each template as needed, using the examples below for reference.
4. When complete, click the **Save Config** button.

Template Types

TEMPLATE	DESCRIPTION
Text	The template is used for all addresses that are printed.
Text One Line	This template defines the order of address entities in the customer's shopping cart address book list. Progress during checkout.
HTML	This template defines the order of address fields located under the Customer Addresses area in the Admin panel (Customers > Manage Customers) and those located on the Add New Address page when a customer creates a new billing or shipping address on his or her account page.
PDF	The template defines the display of billing and shipping addresses in the printed invoices, shipments, and credit memos.
JavaScript Template	In the templates, you will see the following code blocks: `depend` For processing inner elements. `if` An attribute is defined. `var` The code attribute is printed.

Archive Orders

Your store can be configured to archive orders, invoices, shipments, and credit memos after a set number of days. Archiving orders on a regular basis improved performance and keeps your workspace free of unnecessary information, so you can focus on current orders. Invoices, shipments, and credit memos are archived separately from orders, and can be accessed any time. You can move orders and their associated documents to the archive, or restore them to their previous state. Archived orders are not deleted and are still available from the Admin. Archives can also be exported to a CSV file and opened in Excel. When enabled, the "Archive" command appears in the Sales menu.

Orders, Invoices, Shipments, Credit Memos Archiving

To configure the order archive:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Sales.**
3. Click to expand the **Orders , Invoices, Shipments, Credit Memos Archiving** section. Then, follow the steps below.
   a. Set **Enabling Archiving** to "Yes."

   > If you later decide to turn archiving off, all archived orders will be restored to the previous state.

   b. Set **Archive Orders Purchased** to the number of days to wait before an order is archived. By default, this waiting period is set to thirty days.
   c. In the **Order Statuses to be Archive** list, select the order status settings you want to use to identify the orders to be archived. To select multiple items, hold the Ctrl key down and click each item. Repeat to deselect any item.
4. When finished, click **Save Config** to save the changes.

To view the archives:

1. On the Admin menu, select **Sales > Archive.** This option is available only when archiving is enabled. Then, click to open any of the following archives:
   - Orders
   - Invoices
   - Shipments
   - Credit Memos
2. Inspect all archived documents from the list on the archives page. You can also click to open any of the archived document. You can also select multiple documents, and apply any of the following actions:
   - Cancel
   - Hold
   - Unhold
   - Print
   - Move to Orders Management

To manually archive documents:

1. On the Admin menu, select **Sales**. Then, select the type of document you want to archive from the following:
   - Orders
   - Invoices
   - Shipments
   - Credit Memos
2. In the list, select the checkbox of each item you want to archive.
3. In the upper-right corner, set **Actions** to "Move to Archive."
4. Click **Submit** to archive the selected documents.

To restore archived documents:

1. On the Admin menu, select **Sales > Archive.** Then, select the type of document you want to restore.
2. To select all visible documents, in the upper-left corner, click **Select Visible.** Otherwise, manually select the checkbox of each document you want to restore.
3. In the upper-right, set **Action** to "Move to Orders Management."
4. Click the **Submit** button to restore the documents.

To export archives to CSV/Excel:

1. On the Admin menu, select **Sales > Archive**, then, select the type of document you want to export.
2. In the upper-right menu, set **Export to:** to one of the following:
   - CSV
   - Excel
3. Click the **Export** button to export the archive.

Chapter 51:

Return Merchandise Authorization

A return merchandise authorization (RMA) is granted to the purchaser of a product who has requested to return it for a refund or replacement. Typically the customer contacts the merchant to request a refund. If approved, a unique RMA number is assigned to identify the returned product. In the configuration, you can either enable RMA for all products, or allow RMA for only certain products.

RMAs can be issued for Simple, Grouped, Configurable, and Bundle product types. However, RMAs are not available for virtual products, downloadable products, and gift cards.

Topics in this chapter:

- RMA Workflow
- RMA Configuration
- Managing RMA Requests
- Guest RMA Requests
- Return Shipments
- RMA Item Attributes

RMA Workflow

1. A customer requests an RMA. Logged in customers and guests can request RMAs. You can also make a request for an RMA from the Admin.
2. After considering the request, you can authorize it partially, completely, or cancel the request. If you authorize the return and agree to pay for the return shipment, you can create a shipment order with a supported carrier from the Admin.
3. The customer returns the merchandise.
4. You receive and approve the return partially or completely, or cancel.

RMA Workflow

RMA Configuration

RMA requests are always available from the Admin, unless they has been disabled in the configuration. Customers can submit requests for RMAs only if it is set up in the configuration.

Product Settings

Availability for RMA for separate items can be configured using the Enable RMA system attribute. This system attribute is available for simple, grouped, configurable, and bundle products.

The Enable RMA attribute is available on the General tab of the product view. By default, it is set to Use Config and configuration settings are applied. If you set it to No, the product will not appear in the list of items available for return, in both frontend and backend returns. Changes to the Enable RMA attribute apply to products in existing orders, as well.

Enable RMA for Product

To configure RMAs:

1. On the Admin menu, select **System > Configuration**.
2. In the upper-left corner, set **Current Configuration Scope** to the website where the configuration applies.
3. In the panel on the left, under Sales, select **Sales**.
4. Click to expand the RMA Settings section.

RMA Settings

5. Complete the fields as described below.
6. When complete, click the **Save Config** button.

> If all items in the order are configured as not available for return, an RMA cannot be created for the order from either the store or Admin.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable RMA on Frontend	Website	Defines whether store customers can create and view RMA requests. The default value is No. Can be configured for each store view. Applied to both new and existing orders.
Enable RMA on Product Level	Website	Defines the default value for the Enable RMA field on product pages. Can be set for each store view.
Use Store Address	Website	Select which address and contact name is used for return merchandise shipments. Options include: Yes — Uses the Shipping Settings point of origin address. No — Opens the address form to enter an alternate address. Regardless of the value selected, the store name and contact information are used.

RMA Email Configuration

You can configure Magento to send email notifications to a customer at different stages of RMA processing. There are four sections to complete, but the process is essentially the same. Enable the email, and select the sender and template for each.

To enable and configure RMA email notifications:

1. On the Admin menu, select **System > Configuration**.
2. If applicable, set **Current Configuration Scope** to the website where the configuration applies.
3. In the panel on the left, under Sales, select **Sales Emails**.
4. Click to expand the **RMA** section. Then, complete the fields as described below.

RMA

5. Click to expand the **RMA Authorization** section. Then, complete the fields as desribed below.

RMA Authorization

6. Click to expand the **RMA Admin Comments** section. Then, complete the fields to configure the email that is sent when the administrator adds comments to an RMA.

RMA Admin Comments

7. Click to expand the **RMA Customer Comments** section. Then, complete the fields to configure the email that is sent when customers add comments to an RMA.

RMA Customer Comments

8. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled	Store View	Select Yes to send email notifications upon RMA creation (RMA email). If you set Enabled to No, you can still choose to send the notification, when creating an RMA request in the Admin.
RMA Email Sender	Store View	Specify the email address that is used as the RMA email sender.
RMA Email Template	Store View	Select a template for the RMA email.
RMA Email Template for Guest	Store View	Select a template for the RMA email in case the return was created by a non-logged in customer. Custom templates can be created under System > Transactional Emails.
Send RMA Email Copy To	Store View	The email address to which a copy of RMA email is sent.
Send RMA Email Copy Method	Store View	Specify the copy sending method for the RMA email. Select between Bcc and Separate Email.

Enabling Return Shipments

Magento Enterprise Edition has advanced integration with UPS, USPS, DHL, and FedEx that can be used for return products shipments. If you authorize a return, you can create a shipment order in a shipping carrier system and print a shipping label from the RMA management section of the Admin.

Enable for RMA

To enable shipping methods to be used for RMA:

1. On the Admin menu, select **System > Configuration**.
2. Set **Current Configuration Scope** to the applicable website.
3. In the panel on the left, under Sales, select **Shipping Methods**.
4. Click to expand the section for each carrier that you plan to use for RMAs. Then, do the following:
5. Set **Enabled for RMA** to "Yes."
6. When complete, click the **Save Config** button.

Using shipping integration requires that store addresses and shipping methods to be configured correctly. To learn more, see: Shipping Labels.

> RMA shipping expenses are not included in the Shipping reports.

Managing RMA Requests

According to the RMA logic in Magento, you can change the status values of items in the RMA request, and the status of the request changes correspondingly.

> To ensure that RMAs work correctly, do not issue refunds without completing a corresponding RMA request. Otherwise, the available quantities of the products might be counted incorrectly.

Manage RMA

To manage an RMA request:

1. On the Admin menu, do one of the following:
   - Select **Sales > RMA > Manage RMA**.
   - Select **Sales > Orders**. Open the order, and select the **RMA** tab.
   - Select **Customers > Manage Customers**. Open the customer record, and select the **RMA** tab.

   An RMA request is placed.

2. Do one of the following:

Option 1: Reject the Return

Click the **Close** button on the RMA page. The RMA status is now "Closed."

Option 2: Approve the Return

1. In the panel on the left of the RMA page, select **RMA Items**. Then, do the following:
   a. For the rejected items, set **Status** to "Denied."
   b. For the pre-approved items, specify the quantity of the product, you have preapproved in the **Authorized Qty** field, and set their **Status** to "Authorized."
2. When complete, click the **Save** button.

   The status is now "Partially Authorized, " (if there are some items in Denied or Pending Status), or "Authorized" (if all items are authorized). In this case the options for creating the shipping label for the back shipment appear on the General Information tab. When you create a shipping label, the customer can print it from the RMA view page on the frontend.

   At this point, the customer is expected to send the return items back to you. If you agree to pay for the shipment, you can create a shipping label from the RMA page.

3. You receive the returned items. On the RMA Items tab of the RMA page, specify the quantity you have received for each product, change its **Status** to "Return Received." Then, click the **Save** button.

   The new status of the RMA request depends on the correlation between the authorized and received quantities:

   - If Returned Qty is equal to Authorized Qty for all authorized products, the RMA request status becomes "Return Received."
   - If, for some authorized products, Returned Qty is less than Authorized Qty, the return request status becomes "Return Partially Received."

   Now you can decide how the return can be resolved. At this point, you have the following options:

Action	Request RMA status.
Reject	On the RMA page, click the Close button. The status is now “Closed.”
Approve	The RMA is approved.

4. In the panel on the left of the RMA page select **RMA Items**. Then, do the following:
   a. For the rejected items, set **Status** to “Denied.”
   b. For the approved items, specify the quantity of the product, you have approved in the **Approved Qty** field, select the way the return will be resolved in the Resolution field, and set their **Status** to “Approved.”

   You may need to select different resolution options for one product. For example, you authorized the return of 10 chairs. When they arrived, you saw that they are really damaged and you approve the return. But you have only 2 chairs left in stock, so you can exchange only 2 chairs, and refund the rest. In this case, you can add more lines for the product, using Split Line link in the Action column, and then in each row set different Approved Qty and Resolution.
5. Click the **Save** button. The order is now “Processed and Closed,” (if all items are either in “Approved” or “Denied” status) or “Partially Approved” (if at least one product return was Approved, but still there are items with Authorized status) or “Partially Rejected” (if all returned products were rejected, but there are still products for which Returned Qty is less than Authorized Qty).

   Managing the return resolutions (refund or exchange) is not handled through an RMA. Depending on the resolutions you have selected for the approved RMA items, you may need to use one of the following action resolutions,

Action Resolution

RESOLUTION	DESCRIPTION
Exchange	You can create a credit memo for the original order (having selected to refund to store credit and excluded the shipping costs from the refund), and create a new one for the exchange items. Alternatively, if the products you send in exchange are identical to those that were originally ordered, you can simply send the exchange products to the customer, outside of Magento. But in this case the shipment cost will not be included in the Shipment report in Magento.
Refund	Refund Create a credit memo for the refunded items in the original order. You need to decide whether the shipping charges for the original order will be refunded. You can refund the original payment method or refund to store credit.

Guest RMA Requests

Magento Enterprise Edition includes a link in the footer that can be used by guests to manage their orders and returns. The link appears in the footer only during a guest session.

To submit a request for a return:

1. In the footer of the store, click the **Orders and Returns** link.

Orders and Returns

2. Complete the form as follows:
   - Order ID
   - Billing Last Name (as it is specified in the order billing address)
   - Find Order By: The possible values are Email Address and ZIP Code
   - Email Address/Billing ZIP Code: Depends on the selection in the Find Order By field

   Then, click the **Continue** button.

3. When the completed order appears, click the **Return** link in the upper-right corner.

Return

4. Complete the remaining information in the same way as a request made from a customer account.

Creating a Return Shipment

When the RMA request reaches the Authorized status, the options for creating a shipping label for the back shipment appear on the General Information tab.

If the return shipment is managed by the customer, the tracking number (or numbers) of the shipment to the RMA request can be added from the store. Tracking numbers that added from the store are is visible in the Admin.

Shipping Label Workflow

When you create a shipping label, Magento connects to the shipping carrier web services, creates a shipment order at the shipping carrier side, and receives the shipping label and the tracking number. In the shipment order, the customer shipping address (from the original order) is used as sender address, and the store address is used as receiver address. The store address is taken from the RMA configuration.

Shipping labels for a single shipment can be created multiple times. When you create a new shipping label, the old shipping label and tracking numbers are deleted and replaced with new ones. To learn more, see: Shipping Labels.

To create a shipping label:

1. Click the **Create Shipping Label** button. The Packages pop-up window appears.
2. In the Packages pop-up window, do the following:
   a. Select the packages and distribute shipped items between packages. The information about packages (type, size) and its contents (which products go to which packages) is required in order to generate a shipping label.
   b. After you create the packages and click **OK**. Magento connects to the shipping carrier's web services, creates a separate shipping order in the carrier's system for each package, and receives the shipping labels and the tracking numbers.

   > If you click Cancel from the Packages window, a shipping label is not created.

   After you create a shipping label for the return shipment, the customer can print it from the RMA view page of the customer account.

To view a shipping label:

Click the **Print Shipping Label** button to download and view the PDF file for the shipping label.

To view packages configuration:

Click the **Show Packages** button next to the Print Shipping Label button.

RMA Item Attributes

There are four system attributes related to RMAs: Resolution, Item Condition, Reason to Return and Other. These fields are completed by the customer who requests an RMA, and can be later edited from the Admin. If you want customers to include other information, you can create additional item attributes. You can also change the existing options for the system attributes. To learn more about working with attributes, see: Managing Attributes.

Manage RMA Items Attributes

To manage RMA item attributes:

1. On the Admin menu, select **Sales > RMA > RMA Item Attributes**.
2. Complete the **Attribute Properties** as described in the Field Descriptions section below.
3. In the Frontend Properties section, do the following:
   a. If you want the attribute to be included in the fields that the customer completes, set **Show on Frontend** to "Yes."
   b. To determine the order in which this property is listed with others, enter a number in the **Sort Order** field. A value of zero has the highest priority.
   c. Unless you have a customized form, accept the **Forms to Use in** default value of "Default EAV Form."

Attribute Properties

4. In the panel on the left, select **Manage Labels / Options**. Then for each store view, enter a label to identify the field during data entry.

Manage Titles (Size, Color, etc.)

5. When complete, click the **Save Attribute** button.

RMA System Attributes

ATTRIBUTE	DESCRIPTION
Resolution	The quantity of the product items that a customer wants to return. This field does not appear for complex products with multiple options. The customer specifies the quantity to return for each simple product in the Item field.
Item Condition	Describes the condition of the returned item. Options include: Unopened Opened Damaged

ATTRIBUTE	DESCRIPTION
Reason to Return	By default, the following values are available: Options include: Wrong Color Wrong Size Out of Order Other If Other is selected, an additional text field appears to explain the reason for the return.
Desired Resolution	Indicates the way the customer wants to resolve the situation. Options include: Exchange Refund Store Credit

Field Descriptions

ATTRIBUTE	SCOPE	DESCRIPTION
Attribute Code	Global	(Required) A unique identifier for internal use. The code can include a combination of lowercase letters (a-z) and numbers (0-9), but must begin with a letter. The Attribute Code cannot include any special characters or spaces, although an underscore (_) can be used to indicate a space.
Input Type	Global	Determines the input type that is used for data entry in the store. Options include: Text Field Text Area Dropdown Image File
Default Value	Website	The initial value that appears in the field, to assist the customer in data entry.
Input Validation	Global	To perform a validation check on the data, choose the data type that applies to the value entered in the field. Options include: None Alphanumeric Numeric Only

ATTRIBUTE	SCOPE	DESCRIPTION
		Alpha Only URL Email
Minimum Text Length	Global	Determines the minimum number of characters that can be entered in the field.
Maximum Text Length	Global	Determines the maximum number of characters that can be entered in the field.
Values Required	Website	Determines if a value must be entered into the field before the RMA request can be saved. Options include: Yes / No
Input/Output Filter	Global	Options include: None Strip HTML Tags Escape HTML Entries

Notes

Chapter 52:

Store Credit & Refunds

Store credit is an amount to be restored to a customer account. Store credit can be used by customers to pay for purchases, and by administrators as cash refunds. Gift card balances can be credited to the customer's account, instead of using the gift card code for future purchases.

After an order has been paid for and invoiced, all of the order, or a portion of it, can be refunded by issuing a credit memo. A credit memo differs from a refund because the amount of the credit is restored to the customer's account where it can be applied to future purchases, rather than returned to the customer as cash. In some cases, a refund can be given at the same time that a credit memo is issued, just as payment can be made at the time of invoicing. The amount of store credit in a customer's account can be managed from Admin.

Topics in this chapter:

- Product Return Workflow
- Store Credit Setup
- Manage Customer Credit
- Paying with Store Credit
- Create Credit Memo
- Adjustment Fees

Product Return Workflow

Product Return Workflow

Store Credit Setup

The store credit configuration control automatic refunds, the display of credit in customers' accounts, and the templates used for transactional email related to credit.updates.

Store Credit Options

To set up store credit:

1. On the Admin menu, select **System > Configuration**. In the panel on the left, under Customers, select **Customer Configuration**.
2. Click to expand the **Store Credit Options** section.
3. Complete the setting as needed, as described below.
4. When complete, click **Save Config** button.

Field Descriptions

FIELD	DESCRIPTION
Enable Store Credit Functionality	Determines if the Store Credit module is enabled. Disabling it removes Store Credit from customer accounts and from the Admin Manage Customers page. Options include: Yes / No.
Show Store Credit History to Customers	Determines if the balance history is visible in customer accounts. Options include: Yes / No.
Store Credit Update Email Sender	Determines the sender of credit update email messages sent to customers. Options include: Yes / No.
Store Credit Update Email Template	Determines the email template used for credit updates.

Manage Customer Credit

The store administrator can view and edit the credit balance of a customer at any time.

Customer Store Credit

Store Credit Balance

The first section on this page shows the current credit balance. If customer accounts are shared on the global level, this section will show the customer's balance for each website.

Store Credit Balance

Update Balance

The second section enables you to update the balance of the customer. The Update Balance field is where the change in balance should be entered. The amount here can be positive or negative, and will add to or subtract from the existing balance, respectively.

If customer accounts are shared across multiple websites, select the scope of the balance to be updated. Additionally, there is a checkbox that enables you to send the Store Credit Update email to the customer, notifying them of the balance change. Clear the checkbox and select the Store View to determine from which store view the email will be sent.

Update Balance

Balance History

The third section shows the balance history, timestamp, a description of the action, and the balance change. For some actions there is additional information available, such as the order number on which store credit was applied. You can use the sort and filter controls to find records, and apply actions to any credit record in the list.

Balance History

Pay with Store Credit

The customer must be logged in during checkout to pay with store credit. During the Payment Information step of the checkout process, a “Use Store Credit” checkbox appears above the payment methods, with the balance in parentheses. If the available balance is greater than the order grand total, the enabled payment methods disappear when the checkbox is selected. During Order Review, the amount of store credit applied to the order appears with the order totals, and is subtracted from the grand total. The customer’s store credit balance is adjusted when the order is placed.

Orders paid with store credit cannot be refunded. Credit memos will not be available. To refund such an order, it must be canceled and the balance manually increased in the customer’s account. If an order is partially paid with store credit, the amount paid with store credit cannot be refunded. Again, the amount must be manually be added to the customer’s account.

To view a credit balance:

1. On the Admin menu, select **Customers > Manage Customers**.
2. In the list, click to open a customer record in edit mode.

3. In the panel on the left, select **Store Credit**.

To refund to store credit:

On the New Credit Memo page, enter either a full or partial amount of the refund to be applied to the customer's store credit.

Create a Credit Memo

A credit memo is a document that lists the amount that is owed to the customer. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch, or group. Before a credit memo can be printed, it must first be generated for the order.

Credit Memo

To create a credit memo:

1. On the Admin menu, select **Sales > Orders**.
2. Find the order in the list, and click to open the order.
3. In the upper right corner, click the **Credit Memo** button. (The button appears only if an invoice has been generated for the order.)

   The New Credit Memo page looks similar to the completed order page, with an Items to Refund section that lists each item from the invoice.

   > If an online payment method was used, you will not be able to edit these fields.

4. If the Stock Options configuration is set to "Decrease Stock When Order is Placed," do one of the following:
   - If the product is to be returned to inventory, select the **Return to Stock** checkbox.
   - If the product will not be returned to inventory, leave the checkbox blank.

The Return to Stock checkbox appears only if inventory Stock Options is set to "Decrease Stock When Order Is Placed."

Return to Stock

5. Complete the following:

   a. In the **Qty to Refund** box, type the number of items to be returned and press the **Enter** key to record the change. The Update Qty's button appears. Make sure to set the Qty to Refund of any items not to be refunded to zero.

   b. Click the **Update Qty's** button to recalculate the total. (The amount to be credited cannot exceed the maximum quantity that is available for refund.)

   c. In the **Refund Totals** section, complete the following options, as applicable:

Refund Shipping	Enter the amount to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full Shipping Amount from the order minus the Shipping Refund, which is the amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.
Adjustment Refund	Enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order (shipping, items, or tax). The amount entered cannot raise the Total Refund higher than the Paid Amount.
Adjustment Fee	Enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.

> Make sure to set Items to Refund Qty to zero to refund only the shipping amount. If you skip this, the entire order will be refunded.

6. In the Refund Totals section, do the following:

   a. If the purchase was made using store credit, select the **Refund to Store Credit** checkbox, to credit the amount back to the customer's account balance.

   b. To add a comment, type the text in the **Credit Memo Comments** box.

   c. To send an email notification to the customer, select the **Email Copy of Credit Memo** checkbox.

   d. If you want to include the comments you have entered, check the **Append Comments** checkbox.

   e. To receive a copy of the credit memo notification, enter your email address in the **Send Invoice Email Copy To** field.

   The status of a credit memo notification appears in the completed credit memo next to the credit memo number.

Refund Totals

7. To complete the process and generate the credit memo, select one of the following refund option buttons, depending on the capabilities of the payment gateway:

Refund Offline	If the payment gateway does not support online refunds, the store administrator must log in to the gateway merchant account and transfer the funds to the customer account.
Refund Online	If the payment gateway supports online refunds, the amount will be automatically credited to the customer account.

To print a credit memo:

To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.

1. On the Admin menu, select **Sales > Credit Memos**.

Selected Credit Memo with Action

2. In the Credit Memo list, find the credit memo(s) that you want to print. Then, do one of the following:
   - In the list of shipments, click the **View** link at the right of the credit memo record. Then, click the **Print** button to print the PDF document.
   - To print a single credit memo, click to select the checkbox in the first column of the row.
   - To print multiple credit memos, select the checkbox for each to be printed.
3. In the Credit Memo list, set the **Actions** list to "PDF Credit Memos" and click the **Submit** button.
4. When prompted, do one of the following:
   - To save the document, click **Save**. Then, follow the prompts to save the file to your computer.When the download is complete, open the PDF in Adobe Reader, and print the document.
   - To view the document, click **Open**. The printed-ready PDF credit memo opens in Adobe Reader. From here, you can either print the credit memo or save it to your hard disk.

Credit Memo # 100000008
Order # 100000206
Order Date: May 28, 2013

Sold to:	Ship to:
John Doe 10441 Jefferson Blvd, Suite 200 Culver City, California, 90232 United States T: 888-888-8888	John Doe 10441 Jefferson Blvd, Suite 200 Culver City, California, 90232 United States T: 888-888-8888

Payment Method	Shipping Method:
Check / Money order	United Parcel Service - Ground (Total Shipping Charges $12.52)

Products	SKU	Total (ex)	Discount	Qty	Tax	Total (inc)
Bath Minerals and Salt	hdb001	$25.00	-$0.22	1	$2.23	$27.01

Subtotal:	$25.00
Discount (Register10):	-$0.22
Tax:	$2.23
Refunded to Store Credit:	$27.01
Grand Total:	$27.01

Credit Memo

Adjustment Fees

When you create a credit memo for a partial order, the refund for the gift wrapping and/or gift option is included to the first credit memo created for the order. To exclude these costs from the amount to be refunded, the total of these costs should be specified in the Adjustment Fee field located above the Grand Total value in the credit memo.

Adjustment Fee

Enterprise
EDITION

Payments

Chapter 53:

Basic Payment Methods

Magento Enterprise Edition supports a wide variety of payment methods, services, and gateways that you can offer for your customers' convenience. In addition to the payment methods in this guide, other solutions can be downloaded from Magento Connect.

Topics in this chapter:

- Bank Transfer Payment
- Cash On Delivery
- Check / Money Order
- Purchase Order
- Zero Subtotal Checkout
- Saved Credit Card

Merchant Location

Setting the merchant location is the first step to configure any payment method.

To set the merchant location country:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. In the upper-right corner, set **Current Configuration Scope** to either your website or leave it set to "Default Config."
4. In the Merchant Location section, set **Merchant Country** to your country.

Merchant Location

5. When complete, click the **Save Config** button.

Bank Transfer Payment

Magento Enterprise Edition lets you accept payments transferred directly from customers' bank accounts to your merchant bank account.

Bank Transfer Payment

To set up bank transfer payments:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**. Click to expand the **Bank Transfer Payment** section. Then, do the following:
   a. To activate this payment method, set **Enabled** to "Yes."
   b. Enter a **Title** to identify this payment method during checkout.
   c. Set **New Order Status** to "Pending" until payment is authorized.
   d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

e. Enter the **Instructions** your customers must follow to set up a bank transfer. Depending on the country where your bank is located and your bank's requirements, you might need to include the following information:

- Bank account name
- Bank account number
- Bank routing code
- Bank name
- Bank address

f. Set **Minimum Order Total** and **Maximum Order Total** to the amounts required to qualify to use this payment method.

> An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.

3. Enter a **Sort Order** number to determine the position of Bank Transfer in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

4. When finished, click the **Save Config** button.

Cash On Delivery

Magento Enterprise Edition allows you to accept COD payments from your customers. With a cash on delivery payment, the customer pays at the time of delivery. The customer pays the order amount to the shipping carrier, who sends a check to you. Shipping carriers typically charge an extra fee for COD service. You can account for this fee in your shipping and handling charges.

Cash On Delivery Payments

To set up cash on delivery payments:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**. Click to expand the **Cash on Delivery Payments** section. Then, do the following:
   a. To activate this payment method, set **Enabled** to "Yes."
   b. Enter a **Title** to identify this payment method during checkout.
   c. Set **New Order Status** to "Pending" until receipt of payment is confirmed.
   d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

   e. Enter **Instructions** for making a Cash On Delivery payment.
   f. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts which are required to qualify for this payment method.

> An order qualifies if the total is between, or matches, the minimum or maximum order total.

g. Enter a **Sort Order** number to determine the sequence in which Cash On Delivery is listed with other payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

3. When complete, click the **Save Config** button.

Check / Money Order

Magento Enterprise Edition allows you to accept payments by either check or money order. The Check / Money Order payment method is enabled for your story by default.

Check / Money Order

To set up payment by check or money order:

1. On the Admin menu, select **System > Configuration**.

2. In the panel on the left, under Sales, select **Payment Methods**. Click to expand **Check / Money Order**, and do the following:

   a. To activate this payment method, set **Enabled** to “Yes.”

   b. Enter a **Title** to identify this payment method during checkout.

   c. Set **New Order Status** to "Pending” until receipt of payment is confirmed.

   d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

e. In the **Make Check Payable To** field, enter the name of the party to whom the check must be payable.

f. In the **Send Check To** field, enter the street address where the checks are mailed.

g. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts required to qualify for this payment method.

> An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.

h. Enter a **Sort Order** number to determine the position of Check / Money Order in the list of payment methods that is shown during checkout. (0 = first, 1 = second, 2 = third, and so on.)

3. When finished, click the **Save Config** button.

Purchase Order

A purchase order (PO) allows commercial customers to pay for purchases with prior authorization by referencing the PO number. During checkout, the customer is prompted to enter the purchase order number as the method of payment.

Customers who are representatives of other companies can use the Magento Purchase Order payment method to buy products and assign a corresponding purchase order number generated in their accounting system to the sales order generated in Magento.

For example, your customer represents the company that sells computers and needs to buy some monitors from your store. In their accounting system, the customer creates a purchase order which is assigned a unique PO number. The customer places an order in your store using the Purchase Order payment method and references the PO number from their accounting system. All order-related documents, including the order confirmation email, invoice, shipment, and credit memo, will have the PO number on them. The company accounting department can now reference the PO number entered on the Magento sales order so that they can track the order.

When the customer receives your invoice, they process the payment in their accounts payable system. You should always establish the credit worthiness of a customer before accepting payment by purchase order.

Purchase Order

To set up payment by purchase order:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**. Click to expand the **Purchase Order** section. Then, do the following:
   a. To activate this payment method, set **Enabled** to "Yes."
   b. Enter a **Title** to identify this payment method during checkout.
   c. Set **New Order Status** to "Pending" until payment is authorized.
   d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

   e. Set **Minimum Order Total** and **Maximum Order Total** to the amounts required to qualify for this payment method.

> An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.

   f. Enter a **Sort Order** number to determine the position of Purchase Order in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
3. When finished, click the **Save Config** button.

Zero Subtotal Checkout

Zero Subtotal Checkout is only available for orders created from the Admin, and can be used for orders with a subtotal of zero. This situation might occur when a discount covers the entire price of the purchase, and there is no additional charge for shipping. To save time, these orders can be set to invoice automatically.

Unlike other payment methods for which you can set order amount filters, this method contains an intrinsic order amount filter, so that the method appears only when the subtotal equals zero. Zero Subtotal Checkout can be used when:

- The product that the customer adds to the shopping cart is of the Downloadable or the Virtual product type and its price equals zero.
- The price of a simple product is zero and the Free Shipping method is available.
- A coupon code that covers the full price of products and shipping is applied in the shopping cart.
- A gift card is applied to the shopping cart and it fully covers the order amount including shipping. During the checkout of an order covered by a gift card, the customer will still have to select the "No Information Required" payment method in the Payment Information section of the Checkout page.

The payment method is available if taxes are configured so that they are applied to the products in the shopping cart after the discount is applied.

To set up Zero Subtotal Checkout:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**. Click to expand the **Zero Subtotal Checkout** section. Then, do the following:

Zero Subtotal Checkout

   a. Enter a **Title** to identify this payment method during checkout.
   b. Set **Enabled** to “Yes” to activate this payment method.
   c. Set **New Order Status** to one of the following:

Pending	(Default) The order is waiting for authorization.
Processing	Payment has been authorized, and the transaction is being processed.

d. Set **Automatically Invoice All Items** to "Yes" if you want to automatically invoice all items with a zero balance.

e. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

f. Enter a **Sort Order** number to determine the position of Zero Subtotal Checkout in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

3. When finished, click the **Save Config** button.

Saved Credit Cards

This option enables you to take credit cards and to process them offline. This method is useful when you have a card terminal in a brick and mortar store or have access to a virtual terminal. This payment method is enabled by default in the sample data. When accepting payment by credit card, make sure that you have an active security certificate for your store.

> **Important!** Saving customer card data is discouraged unless absolutely necessary. Even though the data is encrypted it still poses a security risk to hold this information. The Saved Credit Cards payment method is not PCI compliant.

Saved CC

To set up the Saved Credit Cards:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left under Sales, select **Payment Methods**.
3. In the upper-right corner, set **Current Configuration Scope** to the applicable website or store view for the configuration.
4. Click to expand the **Saved CC** section.
5. Complete each field in this section, using the following field descriptions for reference.
6. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled	Website	Determines if payment by a saved credit card is available to customers. Options include: Yes / No.
Title	Store View	The name of this payment method that appears to the customer during checkout.
New Order Status	Website	Determines the initial status of orders paid by a saved credit card. Option: Pending

FIELD	SCOPE	DESCRIPTION
Credit Card Types	Website	Determines the credit cards that can be used with this method. Select each card in the list that you support with this method.
Request Card Security Code	Website	Determines whether the payment method requires the customer to enter the security code on the back of the card. If your credit card terminal requires the security code, set this option to "Yes."
3D Secure Card Validation	Website	Determines if credit card validation is carried out using the 3D Secure Credit Card Validation system. You must subscribe to 3D Secure and have it configured for your Magento installation.
Payment from Applicable Countries	Website	Select the range of countries from which you accept payment by saved credit card. Options include: All Allowed Countries / Specific Countries.
Payment from Specific Countries	Website	To accept payment by saved credit card from only specific countries, select each supported country in the list.
Minimum Order Total	Website	Determines the minimum order total of orders that can be paid by saved credit card.
Maximum Order Total	Website	Determines the maximum order total of orders that can be paid by saved credit card.
Sort Order	Website	A number that determines the sequence in which this payment method is listed with others during checkout.

Chapter 54:

PayPal Payment Solutions

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento Enterprise Edition, you can accept payments from all major debit and credit cards, and PayPal account holders. Since customers don't even need a PayPal account to pay with PayPal, both you and your customers can get extra convenience without extra effort.

The PayPal payment methods that are available in Magento, and the method names, are different depending on merchant location. For country-specific PayPal methods, see the list at the end of this chapter . The two PayPal payment methods that can be used all over the world are Express Checkout and PayPal Payments Standard.

> PayPal payment methods are mutually exclusive, with the exception of PayPal Express Checkout. You cannot have more than one method enabled at a time. PayPal Express Checkout can be used with other PayPal payment methods except PayPal Payments Standard. PayPal Payments Standard cannot be enabled simultaneously with any other method, including Express Checkout.

PayPal Express Checkout

With PayPal Express Checkout enabled, customers can click the "Checkout with PayPal" button to make a secure payment from the PayPal site. You can use Express Checkout as a standalone solution, or in combination with one of the other solutions.

- Getting Started with PayPal Express Checkout
- Setting Up PayPal Express Checkout

All-In-One Solutions

PayPal offers a variety of PCI-compliant solutions to meet the needs of your growing business.

PayPal Payments Advanced

(Includes Express Checkout) PayPal Payments Advanced offers your customers a secure checkout experience without leaving your site. Flexible templates and a low monthly fee make this an ideal choice for merchants who want to create a more customized checkout experience.

PayPal Payments Pro

PayPal Payments Pro brings you all the benefits of a merchant account and payment gateway in one, plus the ability to create your own, fully customized checkout experience.

- PayPal Payments Pro Hosted Solution (Includes Express Checkout)
- PayPal Payments Pro Payflow Edition (Includes Express Checkout) (UK only)

PayPal Payments Standard

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment by credit card and PayPal by simply adding a checkout button to your site. During checkout, customers are redirected to PayPal to complete the payment part of the checkout process. There are no lengthy applications to complete, or monthly charges to set up in advance. When you make your first sale, PayPal will guide you through the process of setting up your account.

Payment Gateways

PayPal offers a choice of two payment gateway solutions for your business. You can let PayPal host your checkout on its secure payment site, or you can take control of the entire payment experience with a completely customizable solution.

PayPal Payflow Pro

PayPal Payflow Pro is a fully customizable payment gateway that can be used with any Internet merchant account to process credit card transactions online. Payflow Pro can also be used to process PayPal Express Checkout transactions.

PayPal Payflow Link

PayPal Payflow Link is a hosted payment gateway with an embedded checkout that keeps customers on your site. It’s the fast and easy way to add transaction processing to your site.

PayPal Business Accounts

PayPal payment methods that are integrated with Magento require the merchant to have a PayPal business account and/or a PayPal Payflow account. The type of PayPal account that is required is specified in the description of each method.

Customers who make purchases using Express Checkout and the Express Checkout for Payflow Pro must have buyer accounts with PayPal to pay for their purchases. PayPal Payments Standard (and Website Payments Standard) can work either directly or through a buyer account, if the PayPal Account Optional parameter is enabled in the Premier or Business account of the merchant. By default, this parameter is enabled and customers can choose to enter their credit card information and the billing and shipping addresses and pay the order amount, or to create a buyer account with PayPal and then pay the order amount. When the parameter is disabled, the customer must create a buyer account with PayPal before paying for the order.

Website Payments Pro, Website Payments Pro Payflow Edition, Payflow Pro Gateway, and Payflow Link require the customer to enter credit card information during checkout.

PayPal Payments Advanced

PayPal Payments Advanced lets your customers pay by debit or credit card without leaving your site, and includes an embedded checkout page that can be customized to create a seamless and secure checkout experience.

Checkout Workflow

With PayPal Payments Advanced, your customer stays on your site during the checkout process.

The customer selects the PayPal Payments Advanced payment method on the Payment Information checkout step and clicks Continue.

The Order Review step appears, with the Pay Now button, instead of the Place Order button. After the customer clicks the Pay Now button, a PayPal-hosted form opens in the customer's browser. The customer specifies the card information and clicks Verify Card. If the transaction is successful, the customer is redirected to the order confirmation page.

> The form also includes the Pay with PayPal button, which redirects the customer to the PayPal site, where payment can be made with PayPal Express Checkout.

If the transaction fails for any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These issues are managed by PayPal.

Order Workflow

Processing orders with PayPal Payments Advanced is the same as processing any regular order with PayPal. An invoice, shipment, and credit memo (online/offline refund) can be created. Multiple online refunds are not available for the PayPal Payments Advanced payment method.

With PayPal Payments Advanced, an order is created in the Admin when a customer clicks the Place Order button. The order status can be any of the following, depending on the response from PayPal:

ORDER STATUS	DESCRIPTION
Processing	The transaction was successful.
Pending Payment	The system did not receive any response from PayPal.

ORDER STATUS	DESCRIPTION
Canceled	The transaction was not successful for some reason.
Suspected Fraud	The transaction did not pass some of the PayPal fraud filters; the system receives the response from PayPal that the transaction is under review by Fraud Service. You can manage your fraud filters in your PayPal merchant account.

Merchant Requirements

- PayPal Business Account
- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each.

Configuration

To get started, see Setting Up PayPal Payments Advanced in the Knowledge Base.

PayPal Payments Pro

PayPal Payments Pro brings you all the benefits of a merchant account and payment gateway in one, plus the ability to create your own, fully customized checkout experience. PayPal Express Checkout is automatically enabled with PayPal Payments Pro, so you can tap into more than 110 million active PayPal users.

PayPal Payments Pro supports Magento Secure Payment Bridge, 3D Secure, Cardholder Verification Value (CVV), and can be used to create orders directly from the Admin of your store. Supported credit cards include Visa, MasterCard, Discover, American Express, Switch/Maestro, and Solo.

Checkout Workflow

After customers add products to their shopping carts, they can go to checkout by clicking the Proceed to Checkout button. In the Payment Information checkout section, they select the PayPal Direct Payment option, and enter the credit card information.

- PayPal Payments Pro lets your customer stay on your site during the checkout process.
- PayPal Express Checkout redirects your customer to the PayPal site to complete the transaction.

Order Workflow

If the payment action selected in the configuration is set to “Authorize,” only a sales order of the Processing status is created in Magento. In this case, the amount of money to be authorized is pending approval. With PayPal Payments Pro, you can process the payment online from either the Admin of your store, or from your PayPal merchant account.

> When checking out products from the shopping cart to multiple addresses simultaneously, customers can choose to pay with Website Payments Pro.

At the customer’s request, the store administrator can also create an order from the Admin, and place it through the Website Payments Pro payment method.

An order can be voided online at any time until the order amount is fully invoiced. If required, the order can be partially invoiced online for a specified quantity of products. For each partial invoice submitted through the PayPal payment system, a separate transaction record with a unique ID and of the Capture transaction type will become available on the Transaction tab, and a separate invoice document will be created on the Invoices tab. The payment transaction of the type “Authorization” is closed only after the full order amount is captured.

When capturing the payment transaction, PayPal transfers the order amount from the buyer's balance, bank account or credit card to the merchant's account. If for any reason the customer returns the purchased products and claims a refund, as with order amount capturing and invoice creation, you can create an online refund either from the Admin or from your PayPal merchant account.

> Make sure that instant payment notifications are enabled in your PayPal merchant account. An invoice is created in Magento only after an instant payment notification message is delivered to Magento from PayPal. Based on these notifications, you can receive detailed payment information on each transaction from PayPal after you click the Fetch button on the Transaction page of an order.

If the payment method has been set to "Sale," both a sales order and an invoice are created.

Requirements

- PayPal Business Account (with Direct Payments Activated)

Configuration

To get started, see Setting Up PayPal Payments Pro in the Knowledge Base.

PayPal Payments Standard

For merchants outside the US, this method is called PayPal Website Payments Standard.

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment both by credit card and PayPal by simply adding a checkout button to your store. With PayPal Payments Standard, you can swipe credit cards on mobile devices. There is no monthly fee, and you can get paid on eBay. Supported credit cards include Visa, MasterCard, Discover, and American Express. In addition, customers can pay directly from their personal PayPal accounts. PayPal Payments Standard is available in all countries on the PayPal worldwide reference list.

Checkout Workflow

During checkout, the customer is redirected to the PayPal site to complete the transaction. PayPal Payments Standard is a one-step process for customers whose credit card information is up-to-date in their personal PayPal accounts. All the customer needs to do is click the “Pay Now” button to complete the purchase.

Merchant Requirements

- PayPal Business Account

Configuration

To get started, see Setting Up PayPal Payments Standard in the Knowledge Base.

PayPal Express Checkout

PayPal Express Checkout helps boost sales by giving your customers the ability to pay by credit card or from the security of their personal PayPal accounts. During checkout, the customer is redirected to the secure PayPal site to complete the payment information. The customer is then returned to your store to complete the remainder of the checkout process. Choosing Express Checkout adds the familiar PayPal button to your store, which has been reported to increase sales.

Check out with PayPal

Customer Workflow

Customers with current PayPal accounts can make a purchase in a single step, by clicking the “Check out with PayPal” button. Express Checkout can be added as a standalone, or added to an existing PayPal solution. If you already accept credit cards online, you can offer Express Checkout as an additional option to attract new customers who prefer to pay with PayPal. PayPal Express Checkout can be used as a standalone, or in combination with one of PayPal’s All-In-One solutions.

With Express Checkout, the customer is redirected to the PayPal site to complete the transaction. Unlike other payment methods, PayPal Express Checkout allows the customer to check out at the beginning of the usual checkout workflow.

With PayPal Express Checkout enabled, the “Check out with PayPal” button appears on the product page, and in the shopping cart and mini shopping cart. Clicking the button redirects the customer to the PayPal website to review the purchase information. Customers must log in to their PayPal accounts to complete the transaction. The payment system uses the customer’s billing and shipping information from the customer’s PayPal account. The customer is then redirected back to the Magento Review Order page.

Alternatively, if you have set up your PayPal Express Checkout Advanced settings to skip the order review step, the customer can pay for the order on the PayPal site by clicking the “Pay Now” button. After the customer places the order, the payment information is submitted to PayPal and the payment transaction is settled.

If the customer uses the one-page checkout and selects the Express Checkout payment method, the customer is redirected to PayPal during the Payment Review process, just before the sales order is submitted.

> Express Checkout is not available for orders shipped to multiple addresses.

Requirements

- Merchant PayPal Business Account
- Customer Personal PayPal Account

Configuration

To get started, see Setting Up PayPal Express Checkout in the Knowledge Base. Aside from the configuration, here are some aspects of PayPal Express Checkout to be aware of:

- Saving Customer Billing Address
- Managing Order Transactions
- Bill Me Later
- Billing Agreements
- Settlement Reports

Save Customer Billing Address

The complete billing address of the customer can be saved when the customer pays with PayPal Express Checkout. The billing address can be retrieved from PayPal, and edited by the customer.

Billing and Shipping Address Workflow

When customers pay with PayPal Express Checkout, they are redirected to PayPal. After logging in to PayPal and reviewing the payment information, they return to the Order Review page of your store, where they can choose the shipping method, edit the billing and shipping addresses, and place the order.

Alternatively, if you have set up your PayPal Express Checkout Advanced settings to skip the order review step, the customer can pay for the order on the PayPal site by clicking the **Pay Now** button.

- If a billing address cannot be retrieved from PayPal because of the configuration, or any other reason, the shipping address is used for the billing address on the Order Review page. The customer can edit the address as needed.
- If a customer leaves the billing and shipping addresses without changes, the Place Order button is enabled when the customer selects the shipping method.

The Place Order button is disabled if the customer edits the billing or shipping address. The customer must click the Update Order Data button first. The system will update the information, including the available shipping methods, and the Place Order button will be enabled.

After the customer clicks Place Order, the order is created in Magento, and PayPal performs the related transaction(s). The complete billing and shipping addresses are saved in the order record in Magento.

To save the customer billing address:

Make sure that the functionality is enabled in your PayPal merchant account. Contact PayPal technical support for more information.

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. Under PayPal Express Checkout, click the **Configure** link, and do the following:
   a. Set **Require Customer's Billing Address** to "Yes."
   b. To request the customer's billing address only for orders with downloadable and/or virtual products, set **Require Customer's Billing Address** to "For Virtual Quotes Only."
4. Click the **Save Config** button.

Managing Order Transactions

Magento includes the option to use the Order payment action for PayPal Express Checkout purchases. When a customer submits an order with the Order payment action set, the funds on the customer's card are authorized. If the authorization times out before you capture the payment, the authorization is voided, and a new authorization and capture are initiated when you create an invoice. Only the amount equal to the invoice total is authorized and captured. The maximum number of authorizations allowed for a single order, and the length of time that the authorization and order remain valid is determined by your PayPal merchant account settings. These parameters must be specified in the Magento Admin, as well. The order is captured from the Magento Admin when the invoice is generated.

The Order transaction might be appropriate to use in the following scenarios:

- Backorders, in which available items are sent immediately, and the remaining part of the order is sent when available; this may include more than two shipments.
- Split orders, such as when ordered items are sent in more than one shipment, perhaps to different addresses, and you want to collect a payment for each shipment.
- Drop shipments, which are shipments from other vendors for which you accept the payment.

Using the Order payment action does not affect the checkout process.

Payment Action Set to “Order”

When the customer submits an order using PayPal Express Checkout, with the Order payment action set, the order (with Processing status) is created in the Admin. Two transactions are created for the order: one with type “Order,” and one with type, “Authorization.”

The funds on the customer’s account are put on hold, and can be captured only from the Admin by creating an online invoice. When you create an online invoice, Magento determines if the number of days that have passed since the first authorization exceeds the Order Valid Period value. An online invoice cannot be created for the order if the valid period has expired.

If the order is valid, Magento determines whether the first authorization is valid, and compares the number of days since the Authorization Honor Period value. If the authorization is valid, the necessary sum is captured, and the rest is left on hold. The number of captures is not limited. The authorization is voided when no longer valid. A new authorization and capture are created, but for the invoice total, rather than the order total. From this moment, each time you create an online invoice for the order, a new authorization and capture is initiated for only the invoice total.

Also, Magento will determine whether the number of the conducted captures is equal to the Number of Child Authorizations value each time. If the number specified there is already reached, creating online invoices for the order will not be possible.

Bill Me Later

For US merchants, the PayPal Bill Me Later service is included as a PayPal Express Checkout option. Bill Me Later offers your customers access to financing, so they can buy now and pay later, at no additional cost to you. You are not charged when customers choose Bill Me Later, and pay only your normal PayPal transaction fee.

You can also use free, ready-made banner ads and display a prominent Bill Me Later button during checkout, to remind your customers as they shop that financing is available.

According to an August 2013 Forrester Consulting study commissioned by PayPal, Bill Me Later can increase sales up to 18%, with about one-third resulting from the six months’ same-as-cash payment option. To learn more, visit the PayPal site.

> Before you configure Bill Me Later in your store, make sure it is enabled in your PayPal account .

PayPal Bill Me Later Button

To enable Bill Me Later:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. Under PayPal Express Checkout, click the **Configure** link, and do the following:
   a. Click to expand **Required PayPal Settings**.
   b. Set **Enable Bill Me Later** to "Yes."
4. Click the **Save Config** button.

Learn More

To enable Bill Me Later banners:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. Under PayPal Express Checkout, click the **Configure** link.
4. Click to expand **Required PayPal Settings** section. Then, click to expand **Advertise Bill Me Later** section.

Advertise Bill Me Later

5. Click the **Get Publisher ID from PayPal** button and follow the directions to get your account information. Then, enter your **Publisher ID**.
6. Click to expand the **Home Page** section. Then, do the following:
   a. To place a banner on the page, set **Display** to "Yes."
   b. Set **Position** to one of the following:
      - Header (center)
      - Sidebar (right)
   c. Set **Size** to one of the following:
      - 190 x 100
      - 234 x 60
      - 300 x 50
      - 468 x 60
      - 728 x 90
      - 800 x 66
7. Repeat the previous step for each of the following sections:

- Catalog Category Page
- Catalog Product Page
- Checkout Cart Page

8. When complete, click the **Save Config** button.

Bill Me Later Banner Sizes

Billing Agreements

To simplify the checkout process, customers can enter into a billing agreement with PayPal, as the payment servoce provider. During checkout, the customer chooses the billing agreement as the payment method. The payment system verifies the billing agreement by its unique number, and charges the customer's account. It is no longer necessary for the customer to enter payment information for each purchase.

Customer Account Workflow

Customers can create billing agreements by signing in to their customer accounts, selecting the billing agreement payment method, and initiating the Billing Agreement process. When a billing agreement is created, it is submitted to the PayPal payment system and recorded in the customer account, along with reference information. There is no limit to the number of billing agreements a customer can create. The customer can also cancel some, or all of the billing agreements on the Billing Agreement page of the customer account. The status of each billing agreement is shown as either “Active” or “Canceled.” When a billing agreement is canceled, it cannot be reactivated.

When checking out products from the shopping cart, a customer who has already entered into a billing agreement with PayPal can choose the PayPal Billing Agreement payment method in the Payment Information section of the checkout page, and select the billing agreement reference ID from the list. When the customer places the order, the billing

agreement reference ID and sales order payment details are transferred to the PayPal payment system. After the payment system confirms the payment, a sales order is created in Magento.

Order Workflow

If the customer purchasing items from the web store does not yet have a billing agreement with PayPal, she or he can choose the PayPal Express Checkout method of payment, select the Sign a billing agreement to streamline further purchases with PayPal checkbox, and be redirected to the PayPal payment system where the customer payment information is available and the billing agreement can be signed. After a billing agreement with the store is signed, the customer is redirected back to the Magento frontend, where an order is placed. A corresponding record appears in the billing agreements list.

Additionally, the customer who has no billing agreements in the customer account can also sign a billing agreement from the mini shopping cart or from a product view page by clicking the Check out with PayPal button, that is, by using the PayPal Express Checkout payment method. This opens a dialog box that gives the customer the option to sign a billing agreement with the PayPal payment system. If the customer cancels creating a billing agreement, the order is created through the normal PayPal payment process.

If the customer has one or more billing agreements, the customer can still create a new billing agreement from the customer's account, but will not be able to sign a new billing agreement using the PayPal Express Checkout payment method.

When the customer signs a billing agreement during the order checkout, PayPal creates a payment transaction through the PayPal Express Checkout payment method selected by the customer (that is, a sales order is created in Magento), and a billing agreement reference ID which is sent to the customer and the store. The currently created order is not related to the billing agreement that is signed. Related billing agreement-order records are created in Magento the next time that the customer selects this billing agreement as a payment method and places an order.

Sales Order Workflow

On a customer’s request, the store administrator can create a sales order and after filling in all required information for order currency, items, billing and shipping addresses, she or he needs to select the PayPal Billing Agreement payment method and specify the reference number for a specific billing agreement. When the order is submitted, the billing agreement reference ID is transferred to the PayPal payment system and, if the payment is authorized, an order is created in Magento.

To enable billing agreements:

To enable PayPal Express Checkout Billing Agreements for your store, first enable the service, and then complete the configuration settings for the PayPal payment solution that you use.

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. Click the **Configure** button for one of the following PayPal solutions:
   - PayPal Express Checkout
   - PayPal Payments Advanced (includes Express Checkout)
   - PayPal Payments Pro (includes Express Checkout)
4. Scroll down to the PayPal Billing Agreement Settings section, and do the following:
   a. Set **Enabled** to "Yes."
   b. Complete the remaining information according to your business requirements.

      For detailed configuration instructions, see the knowledge base article for your PayPal solution.

      - Setting Up PayPal Express Checkout
      - Setting Up PayPal Payments Pro
      - Setting Up PayPal Payments Advanced
   c. When complete, click the **Save Config** button.

PayPal Billing Agreement Settings

Managing Billing Agreements

Billing agreements can be managed from both the Customer and Sales sections of the Admin menu.

Sales Management

The list of all billing agreements for all customers is available under Sales > Billing Agreements. Here, the store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date.

A specific record provides general information about the selected billing agreement and about all sales orders that relate to it. The store administrator can view, cancel, or delete a customer's billing agreements in the Sales Management area. Billing agreements can be canceled or deleted by clicking the corresponding buttons located in the upper right part of the Billing Agreement page. An already canceled billing agreement can only be deleted by the store administrator.

Customer Management

Billing agreements created by a single customer can be seen on the Billing Agreements tab of the customer account page in the backend (Customers > Manage Customers). From here, the store administrator can open a required billing agreement to view its general information and sales orders relating to it, cancel a billing agreement, or delete it.

Settlement Reports

The PayPal Settlement report provides the store administrator with the information about each transaction that affects the settlement of funds.

> Before generating settlement reports, the store administrator needs to contact the PayPal Merchant Technical Services for creating an SFTP user account, enabling settlement reports generation, and enabling SFTP at PayPal business account.

After configuring and enabling settlement reports in the PayPal merchant account, Magento will start generating reports during the following twenty-four hours. The list of available settlement reports can be viewed from the Admin.

Settlement Report Settings

To enable settlement reports:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.

3. Click the **Configure** button for one of the following PayPal solutions:
   - PayPal Express Checkout
   - PayPal Payments Advanced (includes Express Checkout)
   - PayPal Payments Pro (includes Express Checkout)
4. Scroll down to the Settlement Report Settings section, and do the following:
   a. Enter your **SFTP Credentials**.
   b. Complete the remaining information according to your business requirements.

      For detailed configuration instructions, see the knowledge base article for your PayPal solution.
   c. When complete, click the **Save Config** button.

To view settlement reports:

1. On the Admin menu, select **Reports > Sales > PayPal Settlement Reports.**
2. To fetch the most recent updates, click the **Fetch Updates** button in the upper-right corner.

   The system connects to the PayPal SFTP server to fetch the reports. When the process is complete, a message appears with the number of reports fetched. The report includes the following information for each transaction:

Settlement Report

FIELD	DESCRIPTION
Report Date	The date when the settlement report was generated.
Merchant Account	The encrypted merchant account number generated by PayPal.
Transaction ID	The identification of a transaction of the money moving event. Transaction ID is generated by PayPal and cannot be changed by the merchant.
Invoice ID	The identification of an invoice generated within Magento. The field can be populated with either an invoice ID sent with the capture request or with the value of the invoice ID (if any) from the authorizing transaction.
PayPal Reference ID	The identification of a related, pre-existing transaction or event.
Event Code	The code assigned to the transaction according to the event that has initiated it. Among these can be website payments

FIELD	DESCRIPTION
	standard payment, express or direct checkout API, pre-approved payment, subscription payment, and so on.
Initiation Date	The date and time the transaction was initiated.
Completion Date	The date and time the transaction was completed.
Gross Amount	The amount of the payment between the two parties and before fees.
Fee Amount	The amount of fee associated with the settlement. All transaction fees are included in this amount. Fees are never amortized across several transactions.

Field Descriptions

FIELD	DESCRIPTION	
PayPal Reference ID Type	One of the following reference codes: Order ID Transaction ID Subscription ID	
Preapproved Payment ID	Options include:	
	Custom	The text entered by the merchant on the transaction in PayPal.
	Transaction Debit or Credit	The direction of money movement of gross amount.
	Fee Debit or Credit	The direction of money movement for fee.

PayPal Payflow Pro

PayPal Payflow Pro gateway, formerly known as Verisign, is a payment method available for customers of the USA, Canada, Australia, and New Zealand. Similar to other PayPal payment methods that are provided in Magento, PayPal Payflow Pro Gateway requires that the store owner have a merchant account at PayPal. The PayPal Payflow Pro gateway links the merchant account at PayPal and the merchant's website, and acts both as a gateway and a merchant account. With PayPal Payflow Pro Gateway, payments are processed directly on the merchant websites and customers are not redirected to PayPal. Unlike other PayPal payment methods, the pricing for using the Payflow Pro Gateway method of payment is fixed no matter how many transactions are submitted. That is, merchants pay a fixed monthly fee plus a fixed fee for each transaction regardless of their number.

PayPal Payflow Pro does not require customers to have buyer accounts at PayPal; but depending on the merchant country, customers may use their PayPal buyer accounts for paying through the gateway.

Customers can enter their credit card information during checkout, without leaving the store checkout page and without using PayPal hosted forms. Additionally, payments are accepted through PayPal Payflow Pro at the time an order is placed.

Customer Workflow

When customers proceed to the checkout, they are required to enter their billing and/or shipping addresses, and the shipping method. In the Payment Information section, they can select the Payflow Pro payment method, enter the type of credit card, its number, expiration date, and the card verification number. Customers are not redirected to the PayPal website when they choose to pay with Payflow Pro Gateway. Depending on the payment action selected in the configuration of the payment method, either a sales order or a sales order and an invoice is created.

Order Workflow

Orders paid with Payflow Pro Gateway can be processed online only from Magento. Here, you can submit an online invoice and as a result a corresponding transaction and an invoice will be created. Regarding order amount refunds, you can also submit them online from the created invoice.

> Partial invoices are not available when using the Payflow Pro Gateway payment method. The Qty to Invoice field is unavailable for editing. The partial refund is unavailable as well.

You can view all Payflow Pro Gateway transactions in your PayPal business account.

PayPal Payflow Link

PayPal PayFlow Link is available for merchants in the United States and Canada only; this method requires a Payflow merchant account. PayFlow Link cannot be used for orders created from the Admin.

PayPal Payflow Link passes the information about the card, entered by the customer, directly to PayPal; it is never stored in Magento system. A customer does not need to have a PayPal account to use this method.

Customer Workflow

The store customer selects the PayFlow Link payment method on the Payment Information checkout step and clicks Continue. The Order Review step appears, where the Pay Now button is available instead of the usual Place Order button. After the customer clicks Pay Now, the PayPal-hosted form, where the credit card information can be entered, loads in the checkout page. The customer specifies the card information and clicks Pay Now. If the transaction is successful, the customer is redirected to the order confirmation page.

The form also contains the Cancel Payment link. Clicking it redirects the customer to the Payment Information step of the checkout, where the payment method is selected. If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are handled on the PayPal side.

Order Workflow

When a customer clicks the Pay Now button on the last checkout step, the order is created in the panel with a “Pending Payment” status. After the customer enters the card information and clicks the Pay Now button in the form, which exists on the PayPal site, the status of the order changes, depending on the response the system receives from PayPal:

ORDER STATUS	DESCRIPTION
Processing	The transaction was successful.
Pending Payment	The system did not receive any response from PayPal.
Canceled	The transaction was not successful for some reason.
Suspected Fraud	The transaction did not pass some of the PayPal fraud filters; the system receives the response from PayPal that the transaction is under review by Fraud Service.

You can manage your fraud filters in your PayPal merchant account.

If the customer clicks the Cancel Payment link in the form, the order status changes to Canceled. The new order is created when a customer proceeds with the checkout.

In general, processing of orders that are paid using the PayFlow Link payment method is the same as regular processing of orders that are paid with PayPal. An invoice, shipment, and credit memo (online/offline refund) can be created. Multiple online refunds are not available for the PayFlow Link payment method.

PayPal Fraud Management Filters

Magento Enterprise Edition includes support for PayPal fraud management filters (FMFs), available for owners of Website Payments Pro PayPal accounts. It works for orders that are paid using PayPal Express Checkout or PayPal Website Payments Pro.

PayPal FMFs make it easier for merchants to detect and respond to fraudulent transactions. FMFs can be configured to flag, hold for review, or deny riskier payments. Magento order status values are changed according to these settings. This section describes the processing of suspected fraudulent orders for different filter action settings.

You can manage your fraud filters in your PayPal merchant account.

Filter Actions

ACTION	DESCRIPTION
Review	If you set the filter action to “Review,” the suspected order receives the status ”Payment Review” when the order is placed. You can review the order and approve, or cancel the payment in the Admin, or on the PayPal side. To deny the payment from the Admin, click the Deny Payment button in the upper-right corner of the page. The order status changes to “Canceled,” the transaction is reverted, and funds are released on the customer’s account. The corresponding information is added in the Comments History section of the order view. When you click the Accept Payment or the Deny Payment buttons, no new transactions for the order are created. If you change the status of the transaction on the PayPal site, you must click the Get Payment Update button in the upper-right corner of the Order page in the Magento Admin to apply the changes. If you click Accept Payment or Deny Payment, the changes made at the PayPal site are applied.
Deny	If you set the filter action to “Deny,” the suspected order cannot be placed by the customer, because the

ACTION	DESCRIPTION
	corresponding transaction is rejected by PayPal.
Flag	If you set the filter action to “Flag,” the suspected order gets the status ”Processing” when it is placed. The corresponding transaction is marked with a “flag” in the list of the merchant account transactions.

PayPal Solutions by Country

COUNTRY	PAYPAL PAYMENT SOLUTION
United States	PayPal Payments Advanced (Includes Express Checkout) PayPal Payments Pro (Includes Express Checkout) PayPal Payments Standard+ PayPal Payflow Pro (Includes Express Checkout) PayPal Payflow Link (Includes Express Checkout) PayPal Express Checkout
Canada	PayPal Payments Pro (Includes Express Checkout) PayPal Payments Standard PayPal Payflow Pro PayPal Payflow Link (Includes Express Checkout) PayPal Express Checkout
Australia	PayPal Payments Standard PayPal Payflow Pro PayPal Payments Pro Hosted Solution PayPal Express Checkout
United Kingdom	PayPal Express Checkout PayPal Payments Standard PayPal Payments Pro Payflow Edition (Includes Express Checkout) PayPal Payments Pro Hosted Solution
Japan	PayPal Express Checkout PayPal Payments Standard PayPal Website Payments Plus (PayPal Payments Pro Hosted Solution)
France	PayPal Express Checkout

COUNTRY	PAYPAL PAYMENT SOLUTION
	PayPal Payments Standard PayPal Integral Evolution (PayPal Payments Pro Hosted Solution)
Italy	PayPal Express Checkout PayPal Payments Standard PayPal Pro (PayPal Payments Pro Hosted Solution)
Spain	PayPal Express Checkout PayPal Payments Standard PayPal Pasarela integral (PayPal Payments Pro Hosted Solution)
Hong Kong	PayPal Express Checkout PayPal Payments Standard PayPal Payments Pro Hosted Solution
New Zealand	PayPal Express Checkout PayPal Payments Standard PayPal Payflow Pro
Others	PayPal Express Checkout PayPal Payments Standard

Notes

Chapter 55:

Magento Secure Payment Bridge

Magento Secure Payment Bridge is a PA-DSS certified payment application that helps merchants meet PCI compliance. Magento Secure Payment Bridge is included with a subscription to Magento Enterprise Edition, and is installed separately. Magento Secure Payment Bridge is a perfect way to keep all customer-to-merchant information interchange working via a separate PA-DSS compliant application, eliminating the need to make your Magento installation itself PA-DSS compliant. This enables you to make updates with new marketing, merchandising and content management features to the core Magento eCommerce application without having to go through PCI compliance reassessment of the entire Magento eCommerce platform.

All sensitive credit card data that is received from customers during the checkout process is put into the token in Magento Secure Payment Bridge and is stored there, encrypted, until the payment system returns the successful result of a payment transaction. After the transaction is completed, the payment data within Magento Secure Payment Bridge is cleaned from the token, which remains in the database during a specific period of time. With Magento Payment Bridge, no sensitive credit card data is passed over or stored in Magento, which guarantees the security of customers' credit card data.

Topics in this chapter:

- Supported Payment Services
- Payment Bridge Setup
- Gateway Setup (When Required)
- Gateway Setup (When Optional)
- Version Comparison

Supported Payment Services

Magento Payment Bridge supports the following payment services:

- Cardinal Centinel 3D Secure Credit Card Validation
- Kount Fraud Detection Service

Cardinal Centinel 3D Secure

Cardinal Centinel 3D Secure credit card validation can be used for the following payment methods, if they are configured to use Magento Secure Payment Bridge:

- Authorize.Net
- PayPal Payments Pro
- PayPal Payments Pro Payflow Edition (UK only)
- PayPal Payflow Pro

> Sage Pay Direct and Ogone Direct Link payment gateways use their own 3D secure credit card validation services, which are configured during the payment gateway configuration in the Payment Bridge application.

Cardinal Centinel 3D Secure credit card validation payment service is enabled and configured in the Magento Secure Payment Bridge. To use Cardinal Centinel 3D Secure credit card validation payment service, you must have an account in Cardinal Centinel system.

Kount Fraud Detection Service

Kount Fraud Detection service is enabled and configured in Magento Secure Payment Bridge. When the service is enabled, it is used for all payments managed by Payment Bridge.

Before using Kount Fraud Detection, you must set up an account in the Kount system. The set of rules for credit card validation is created in the Kount agent web console. For each transaction, the Kount system sends one of the following responses about the transaction status:

- Approve
- Review
- Escalate
- Decline

If a Review or Escalate response is received, the transaction is marked with a “Suspected Fraud” comment in the Magento Admin Panel. This comment is displayed in the Comments History section on the Order View page of the corresponding order, which you can view by navigating to Sales > Orders. If Kount declines the transaction, the

corresponding order is not created in Magento and the transaction is not completed. In all other cases the status of a transaction assigned by Kount does not influence the transaction itself; it serves only as an indicator for the merchant.

Payment Bridge Setup

Before enabling the Payment Bridge functionality in the Magento backend configuration, your Magento Payment Bridge administrator must create a merchant account and configure payment gateways in the Magento Payment Bridge payment application. The Magento Payment Bridge administrator provides the merchant with the merchant account information required for the authorization by the Payment Bridge.

For each payment method that uses Payment Bridge, the configuration consists of the following steps, which can be completed in any order:

- Enable/disable and configure the method in Payment Bridge (via SSH client). Payment gateway credentials are required for this configuration. For more information, see the Magento Payment Bridge PA-DSS Implementation Guide.
- Enable/disable and configure the payment method in the Magento Admin.

To enable and configure Payment Bridge:

1. On the Admin menu, select **System > Configuration**.
2. You can either leave **Current Configuration Scope** set to "Default Config," or select your website. It is recommended that you enable and configure Payment Bridge on the global level if your business logic allows.
3. In the panel on the left under Sales, select **Payment Methods**. Click to expand the **Payment Bridge** section, and do the following:

Payment Bridge Configuration

   a. Set **Enabled** to "Yes."

> To enable Payment Bridge, it must be installed and configured with the merchant account and required payment gateways. If you need help, contact your Magento Payment Bridge administrator to complete the necessary configuration.

b. In the **Merchant Code** field, enter the merchant ID that was specified by the Magento Payment Bridge administrator when the merchant account was created.

> After the Magento Payment Bridge administrator creates a merchant account, the merchant code, merchant key, and data transfer key are provided to the merchant.

c. Enter the **Merchant Key**. The merchant key was either entered by the Magento Payment Bridge administrator, or automatically generated by the payment application when the merchant account was created. The merchant key is a unique code that helps secure the connection to the Payment Bridge.

d. In the **Gateway Basic URL** field, enter the URL that connects to the Payment Bridge payment application.

e. Enter the **Data Transfer Key**. The data transfer key was generated when the Payment Bridge merchant account was created. The data transfer key encrypts any data that is transferred between the merchant and Magento Payment Bridge.

f. (Default Config only) Enter the **Magento Unique Identifier** for the current Magento instance. The Magento Unique Identifier field is used if there are several instances of Magento using the same Payment Bridge merchant account.

> It is essential to assign identifiers to websites that are powered by different Magento instances and use saved payment methods, such as Authorize.Net CIM.

g. In the **Debug** field, specify whether data messages that are sent to the payment system and received from it are written into the system log file.

4. When complete, click the **Save Config** button.

You can now configure payment methods to use Payment Bridge.

Gateway Setup (When Required)

For all payment methods that work only if Magento Secure Payment Bridge is enabled and configured, the options which should be configured in the Magento Admin are largely the same, although the set of available options may differ.

Braintree Example

The following example shows how to configure Braintree for Magento Secure Payment Bridge.

To enable and configure Braintree:

1. On the Admin menu, select **System > Configuration**.
2. In the upper-left corner, set **Current Configuration Scope** to the applicable website. If you don't have additional websites, you can accept the “Default Config” setting.
3. In the panel on the left under Sales, select **Payment Methods**.
4. Click to expand the **Braintree** section, and do the following:
   a. Set **Enabled** to “Yes.”
   b. In the **Title** field, enter the name that appears to the customer in the Payment Information section during checkout.
   c. Set **Payment Action** to the way you want payments to be authorized by Braintree. The following options are available:

Authorization	Funds on the customer’s card are only authorized on the Braintree system, and only the order is created in the backend of your store. You can later create an invoice and conduct the capturing.
Sale	Funds on the customer’s card are authorized and captured on the Braintree side, and as a result an order and an invoice are created in the backend of your store.

   d. To enable Braintree to securely store sensitive customer information, set **Enable Vault** to “Yes.”

      Information stored in the vault could include the token generated by Magento Secure Payment Bridge that is used to charge customers, customer address information, and so on.

      > After a credit card profile is saved, Magento Secure Payment Bridge stores the first four and last six digits of the card number, and generated the tokens that are used to charge customers.

   e. Enter a number in the **Sort Order** field to determine the sequence in which this payment method is listed iwth others during checkout.
5. When complete, click the **Save Config** button.

Gateway Setup (When Optional)

The configuration process is similar for payment methods that can be used either with Magento Secure Payment Bridge or directly with payment gateways, although the set of options may differ.

Authorize.Net Example

The following example shows how to configure Authorize.Net for Magento Secure Payment Bridge.

To enable and configure Authorize.Net:

1. On the Admin menu, select **System > Configuration**.
2. In the upper-left corner, set **Current Configuration Scope** to the applicable website. If you don't have additional websites, you can accept the “Default Config” setting.
3. In the panel on the left under Sales, select **Payment Methods**.
4. Click to expand the **Authorize.Net** section, and do the following:
   a. Set **Enabled** to “Yes.”
   b. Set **Use via Payment Bridge** to “Yes.”
   c. Make any other configuration settings that are needed.
5. When complete, click the **Save Config** button.

> For payment methods that can work with or without Magento Secure Payment Bridge, the set of options available for configuring might differ, depending on your choice concerning payment bridge usage. For example, for Authorize.Net, 3D Secure Card Validation is available only if the Magento Secure Payment Bridge is not used. Customer Information Manager is available only when Magento Secure Payment Bridge is used.

Payment Bridge Version Comparison

If you currently use Magento Enterprise Edition 1.13.0.2, it is recommended that you upgrade to Magento Secure Payment Bridge (v. 1.11.31.0). If you plan to upgrade to newer versions of Magento Enterprise Edition, you should upgrade Magento Secure Payment Bridge at the same time.

EE 1.13.0.2 and later

PAYMENT METHOD	PARTIAL CAPTURE*	FULL REFUND FROM INVOICE	PARTIAL REFUND FROM INVOICE*	PARTIAL REFUND FROM ORDER
PayPal Solutions				
Payflow Pro	Yes	Yes	Yes	Yes
Website Payments Pro Payflow Edition	Yes	Yes	Yes	Yes
Website Payments Pro	Yes	Yes	Yes	Yes
Other Gateways				
Authorize.Net	Yes	Yes	Yes	Yes
Braintree	No	Yes	Yes	Yes
CyberSource	No	Yes	No	No
DIBS	No	Yes	Yes	Yes
eWAY Direct	Yes	Yes	Yes	Yes
First Data Global Gateway	No	Yes	No	No
Ogone DirectLink	Yes	Yes	Yes	Yes
Paybox Direct	No	No	No	Yes
Payone.de	No	Yes	No	No
PSiGate	No	Yes	Yes	Yes
SagePay Direct	Yes	Yes	Yes	Yes
Worldpay	Yes	Yes	Yes	Yes

* Same as offline

Prior to EE 1.13.0.2

PAYMENT METHOD	PARTIAL CAPTURE*	FULL REFUND FROM INVOICE	PARTIAL REFUND FROM INVOICE*	PARTIAL REFUND FROM ORDER
PayPal Solutions				
Payflow Pro	No	Yes	No	No
Website Payments Pro Payflow Edition	Yes	Yes	Yes	Yes
Other Gateways				
Authorize.Net	No	Yes	Yes	Yes
Braintree	No	Yes	Yes	Yes
CyberSource	No	Yes	No	No
DIBS	No	Yes	Yes	Yes
eWAY Direct	No	No	No	Yes
First Data Global Gateway	No	Yes	No	No
Ogone DirectLink	Yes	Yes	Yes	Yes
Paybox Direct	No	No	No	Yes
Payone.de	No	Yes	No	No
PSiGate	No	Yes	Yes	Yes
SagePay Direct	Yes	Yes	Yes	Yes
Worldpay	No	Yes	Yes	Yes

* Same as offline

Chapter 56:

Payment Gateways

Payment gateways make it possible for you to accept credit card payments directly from your store. Magento Enterprise Edition supports a wide range of payment gateways that offer merchant services in all parts of the world.

Integrated Solutions

Magento Secure Payment Bridge supports the following payment methods, which are integrated with external payment gateways. Some of the methods can be used with, or without, Magento Secure Payment Bridge. Most of the methods listed are available "out-of-the-box" for Magento Enterprise Edition, and can be used with Magento Secure Payment Bridge when installed, enabled, and properly configured.

Worldwide

PayPal

With PayPal's deep integration with Magento, you can easily accept credit cards and PayPal payments using PayPal, all while keeping customers on your site. Already have a merchant account? Add PayPal Express checkout to increase conversion.

Authorize.Net

Authorize.Net includes free fraud tools, free customer support, a free website seal, and the ability to accept multi-channel payments: online, mail order/telephone order, retail and mobile. Trusted by 300,000 customers. Authorize.Net CIM works with Magento Secure Payment Bridge.

CyberSource

CyberSource, a wholly-owned subsidiary of Visa Inc., is a payment management company. Over 330,000 businesses worldwide use CyberSource to process online payments, streamline fraud management, and simplify payment security.

First Data

Fast, convenient, and secure. With over forty years of industry leading experience Express Merchant Processing Solutions (EMPS) powered by First Data helps millions of businesses like yours bring safe, easy, cost-effective payments to their customers with affordable support, regardless of size.

WorldPay

WorldPay operates in forty countries, and is a major global leader in payment processing. They pioneered online payments for small and medium sized businesses and process millions of online payments every day.

North America

PSiGate

PSiGate is a full-service Canadian provider of electronic payment processing services. They deliver a secure interface for your website so you can accept credit card and Interac Online payments with reliable, real-time transaction processing. They ensure maximum performance while taking into account power, security, disaster tolerance and bandwidth requirements.

Braintree

Braintree helps online businesses process credit card payments by providing a merchant account, payment gateway, recurring billing and credit card storage. The company is disrupting the payments industry by providing elegant tools for developers coupled with white-glove support.

Europe

DIBS Payment Services

DIBS Payment Services is the leading independent provider of functional, secure and innovative payment services for Internet commerce in the Nordic countries. DIBS handles more than 13,000 customer transactions daily in seventeen countries.

Ogone

Ogone Payment Services delivers non-face-to-face businesses the payment solutions platform, added value opportunities and technology advancements that become essential for the way payments are performed, managed and secured today.

Paybox Direct

Paybox Services provides merchant accounts and eCommerce payment services for merchants in Europe.

PAYONE.de

PAYONE is a leading payment service provider in Germany. Featuring processing of national and international payments and outsourcing of monetary transactions, the payment-Platform Finance Gate makes processes fully automated with the highest performance standards and security in mind. PAYONE requires the base currency to be euros.

Sage Pay Direct

Sage Pay is the UK's largest independent payment service provider, processing millions of secure payments every month for over 33,000 businesses, from startups through to major online, consumer, and business brands.

Oceania

eWAY Direct

Focusing on high-level standards in technology, innovations and customer care, eWay has become Australia's award-winning payment gateway. eWAY specializes in delivering successful eCommerce payment gateway services to thousands of merchants.

Testing Credentials

When testing the configuration of a payment gateway, use the following credentials for test transactions.

Visa:	4111111111111111
MasterCard:	5555555555554444
American Express:	378282246310005
Expiration Date:	Any future date
CVV/CVC:	123 or 000

Authorize.Net

Authorize.Net gives merchants the ability to accept credit card and payments through the Authorize.Net payment gateway. It processes the credit card information entered during checkout, and creates a transaction either for the payment authorization or for the payment authorization and a capture of the funds, depending on the configuration.

Authorize.Net can be used to pay for purchases made from the storefront or for orders placed from the Admin. Orders that use the Authorize.Net payment method can be processed from your store's Admin and also from the Authorize.Net merchant account.Based on the response that Magento receives from Authorize.Net, an order is created in Magento with an assigned Authorize.Net transaction number.

Capture Workflow

Authorize.Net does not accept partial invoices from Magento. The Qty to Invoice field cannot be edited on the New Invoice for Order page. When an invoice is captured online, a corresponding document with status of “Paid” is created and appears in the list of Invoices. In addition, a Capture transaction is added to the list of Transactions.

You can partially capture the order amount from the Authorize.Net merchant account. However, Authorize.Net does not allow for the remaining amount to be captured. In the case of a partial capture from Authorize.Net, no invoice or transaction is created in Magento for the order.

To find an order:

1. On the Admin menu, select **Sales > Orders**.
2. In the list, click to open the order.
3. On the order detail page, click the **Invoice** button.

Payment Actions

PAYMENT ACTION	DESCRIPTION
Capture Online	When an invoice is submitted, the system captures the payment amount through the external payment gateway. In this case, an invoice and a transaction of the "Capture" type are added to the order detail page. If a payment is captured online, you can later create an online credit memo from the invoice, if required. A payment capture transaction can be voided only from your Authorize.Net merchant account.
Capture Offline	When an invoice is submitted using this option, the does not capture the payment, and only an offline invoice is created in Magento. It is assumed that the payment will be captured directly through the payment gateway, and you do not have the option to capture the payment online through Magento. If the invoice is captured online, you cannot create an online refund from Magento.
Not Capture	When an invoice is submitted using this option, Magento does not capture the payment, and no corresponding transaction is created in the Authorize.Net merchant account. However, it is assumed that you will capture the payment online through Magento at a later date. Therefore, the Capture button is available in the completed invoice, which has a status temporarily set to "Pending." The order can be canceled at any time before the payment is captured. After the payment has been captured, a credit memo must be generated to cancel the order.

Authorize.Net Setup

The Authorize.Net payment gateway gives you the ability to accept credit card and electronic check payments in USD, quickly and inexpensively.

Step 1: Open an Authorize.Net Merchant Account

The first step is to establish an Authorize.Net merchant account. As you go through the process, take note of the following information, which you will need to complete the configuration:

- API Login ID
- Transaction Key

To learn more about opening an Authorize.Net merchant account, visit their site at www.authorize.net.

Step 2: Configure Authorize.Net for Your Store

1. On the Admin menu, select **System** > **Configuration.**
2. In the panel on the left, under Sales, select **Payment Methods**.
3. Click to expand the **Authorize.Net** section. Then, do the following:
   a. To activate Authorize.Net, set **Enabled** to "Yes."
   b. Set **Payment Action** to one of the following:

Authorize Only	When an order is submitted, Authorize.Net validates and authorizes the transaction. You must then, log in to your Authorize.Net merchant account to capture the transaction.
Authorize and Capture	The payment is authorized and captured on the Authorize.Net site, and your store generates an order and invoice.

   c. Enter the **API Login ID** for your Authorize.Net merchant account.
   d. If using Authorize.Net with Magento Secure Payment Bridge, set **Use via Payment Bridge** to "Yes."
   e. Enter an appropriate **Title** to identify Authorize.Net during the checkout process.
   f. Enter the **Transaction Key** for your Authorize.Net merchant account.
   g. Set the default **New Order Status** to one of the following:
      - Processing
      - Processed Ogone Payment
   h. Verify the **Gateway URL** to the Authorize.Net server.

i. Set **Test Mode** to one of the following:

Yes	When you are ready to test the configuration and process test transactions.
No	When you are ready to "go live" with the Authorize.Net payment method.

j. Select the **Accepted Currency** for the store.

k. Set **Debug** to “Yes” to record the details of all exchanges between the store and the payment system in a log file.

> In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

l. If you want to email the customer when the order is processed, set **Email Customer** to “Yes.”

m. Enter your store’s email address in the **Merchant’s Email** field.

n. In the **Credit Card Types** list, select each credit card which can be used with this payment method. Accepted credit card types include:

- American Express
- Visa
- MasterCard
- Discover
- Other (approved by Authorize.Net)

o. To require that customers must enter a card verification value (CVV), set **Credit Card Verification** to “Yes.”

p. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

q. Enter the **Minimum Order Total** and **Maximum Order Total** for Authorize.Net transactions. To qualify, the order total must exactly match the minimum or maximum threshold, or fall somewhere in between.

r. Enter a **Sort Order** number to determine the position of Authorize.Net in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

s. To permit the authorization of partial orders processed by Authorize.Net, set **Allow Partial Authorization** to "Yes."

t. For an additional layer of fraud protection for your transactions, set **Enable 3D Secure Card Validation on Frontend** to "Yes." To learn more, see 3D Secure Credit Card Validation.

4. When finished, click the **Save Config** button.

Authorize.Net Configuration

Field Descriptions

OPTIONS	SCOPE	DESCRIPTION
Enabled	Website	Enables/disables the Authorize.Net payment gateway.
Payment Action	Website	Determines how payments made with

OPTIONS	SCOPE	DESCRIPTION
		Authorize.Net are processed. Options include: Authorize Only — After an order is submitted, Authorize.Net authorizes the transaction. Your store administrator must log in to the merchant account on Authorize.Net to capture the transaction. Authorize and Capture — A payment is authorized and captured on the Authorize.Net site, and the backend of your store generates an order and an invoice.
API Login ID	Website	Authorize.Net merchant account API Login ID.
Use via Payment Bridge	Website	Appears only when Payment Bridge is active. Options include: Yes / No.
Title	Store View	Identifies this payment method in the checkout settings of the Payment Information page of your store.
Transaction Key	Website	Authorize.Net merchant account Transaction Key.
New Order Status	Website	Determines the status of new orders. Options include: Processing Processed Ogone Payment
Gateway URL	Website	The URL of the Authorize.Net gateway.
Test Mode	Website	Specifies whether your store is running in test mode or production mode for the Authorize.Net payment method.

OPTIONS	SCOPE	DESCRIPTION
		Yes — Test mode lets you test the configuration and process test transactions. No — The payment account is in production mode (live) and payments will be processed.
Accepted Currency	Website	Identifies each currency that is accepted as payment in your store.
Debug	Website	If set to "Yes," the details of all exchanges between your store and Authorize.Net are recorded in a log file. The log file is stored on the server and is accessible only to developers. In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.
Email Customer	Website	If set to "Yes," the customer receives notification by email when the order is processed.
Merchant's Email	Website	The email address where you want to receive notifications from Authorize.Net.
Credit Card Types	Global	Identifies the credit card types you accept through Authorize.Net. Options include: American Express Visa MasterCard Discover Other (as approved by Authorize.Net).
Credit Card Verification	Global	If set to "Yes" customers are required to enter a card verification value (CVV).
Payment from Applicable Countries	Global	Identifies the countries where you want this payment method to be available. Options include:

OPTIONS	SCOPE	DESCRIPTION	
		All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
		Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
Minimum Order Total	Global	Specifies the minimum order total that qualify for this payment method.	
Maximum Order Total	Global	Specifies the maximum order total that qualify for this payment method.	
Sort Order	Global	This number determines the order in which Authorize.Net is listed with other payment methods during checkout.(0 = first, 1 = second, 2 = third, and so on.)	
Allow Partial Authorization	Website	Determines if authorization can be made for part of an order. Options include: Yes / No.	
3D Secure			
Enable 3D Secure Card Validation on Frontend	Website	When set to "Yes," an additional layer of fraud protection is available for your transactions. Options include: Yes / No.	
Severe 3D Secure Card Validation	Website	When set to “Yes,” removes chargeback liability from merchant.	
Centinel API URL	Website	If left empty, a default URL will be used. A custom URL can be provide by agreement with CardinalCommerce.	

Partial Authorization with Authorize.Net

Authorize.Net gives you the ability to accept multiple credit cards as payment for a single order. If there isn't enough remaining balance on a single card to cover the purchase, the amount can be distributed across multiple cards. Up to five credit cards can be used to pay for a single order.

Customer Workflow

During the checkout process, the customer selects Authorize.Net, enters the card information, and proceeds to Order Review. When the customer clicks the Place Order button, the request is sent to Authorize.Net. If the amount available on the card is not enough to cover the order total, the following message appears:

> The amount on your credit card is insufficient to complete your purchase. The available amount has been put on hold. To complete your purchase, click Continue and specify additional credit card number. To cancel the purchase and release the amount on hold, click Cancel.

If the customer chooses to continue, the Payment Information checkout step reappears, and the customer is prompted to enter another credit card. The information about the previously used credit cards appears as well.

If the customer clicks the Cancel button, all authorizations are reversed. The customer can then choose another payment method to complete the purchase. If the customer closes the browser window, the authorizations remain active until they expire. The term of each authorization depends on the bank that issued the credit card. An order is created only after the total amount of the order is captured.

Partial Authorization During Checkout

If the customer reaches the limit of five cards that can be used for one order, the following message appears during Order Review:

> You have reached the maximum number of credit cards that can be used for the payment.

When the customer clicks the OK button, the Payment Information checkout step reappears, with the following message:

> You have reached the maximum number of credit cards that can be used for one payment. The available amounts on all used cards were insufficient to complete payment. The payment has been canceled and amounts on hold have been released.

The system sends a request to Authorize.Net to void all authorizations of this payment. The customer can now choose another payment method, or try a different credit card.

During partial authorization, the bank might reject the transaction, For example, the daily limit for the card might be exceeded. In this case, Authorize.Net sends the appropriate response to Magento and the following message appears:

> Your credit card has been declined. Click Continue to specify another credit card to complete your purchase. Click Cancel to release the amount on hold and select another payment method.

If the customer decides to reverse the payment and clicks Cancel, the payment is reversed, and a request is sent to Authorize.Net to release the amounts on hold from the previously entered cards. The customer can then select another payment method. If the customer chooses to continue, the Payment Information checkout step reappears, and the customer is prompted to enter another credit card.

Before the order is placed, the customer can click the Cancel button from the Payment Information step to reverse all authorizations and release all amounts.

If the customer changes any order information after having started the partial authorization process, an error will occur when the order is submitted. In such a case, all authorizations are released, and the customer is redirected to the Payment Information checkout step.

Admin Workflow

Partial authorization can be applied to new orders and recorders from the Admin. After you choose the Authorize.Net payment method, enter the card information, and click the Submit Order button, the request is sent to Authorize.Net. If the amount on the card is not enough to cover the order, the available funds are put on hold, and the partial authorization is triggered. A message appears on the Create New Order page, asking if you want to continue. If you choose to continue, the system displays the information about the previously used credit cards, and prompts you to enter another credit card. If you click the Cancel button, all authorizations are reversed.

If you close the browser window during the partial authorization process, the authorizations remain active until they expire. The term of authorization depends on the bank that issued the credit card.

If payment is not complete, you can click the Cancel button in the upper-right corner. Magento then sends a request to Authorize.Net to void the authorization for all cards that were entered during the process, and the amounts on hold are released. If the payment gateway is not able to void authorization for some transactions, the order is canceled by the system only.

Do not change any order information after the partial authorization process begins. Otherwise, an error occur when you submit the order, and all authorizations are released automatically.

Refund Workflow

When processing a refund for an order that was paid as an Authorize.Net partial authorization, Magento refunds the correct captured amount to each card. The process is managed by the system, and requires no action on your part.

When initiating an online invoice or refund, and some authorizations fail, the system proceeds with the remaining authorizations, but does not generate the invoice or refund. After all authorizations have been processed, information about the successful authorizations, as well as any that failed, appears in the header of the order. The same information is added to the order comments section of the order.

The administrator is then prompted to process the failed authorizations manually, by creating an offline invoice or offline refund in Magento.

For a partial refund, the amounts are refunded to the cards from which they originated, in the order of authorization. The amount captured from the first card is the first to be refunded. In this order, it is possible for the amount reversed on the last card to be less than what was captured during the partial authorization process. In this case the transaction for the card remains open, and can be closed in the next partial refund.

Magento stores only the last four digits of the credit card number. For a period of 120 days after the payment, Authorize.Net allows merchant systems to submit a refund using the last four digits of the credit card. After 120 days have passed, you cannot process an online refund for an order that was paid with Authorize.Net.

Because American Express does not support authorization reversals, it is not possible to create an online refund for any purchases paid for with this method. In such a case, you can create an offline refund, and settle the situation by releasing the customer's funds through the appropriate merchant account, outside of the Magento system.

Partial Authorization Setup

Partial authorization can be activated in the Authorize.Net configuration at either the global, or website level.

To enable partial authorization:

1. On the Admin menu, select **System > Configuration**.
2. In the upper-left, set **Current Configuration Scope** as needed. To use partial authorization at the global level, accept the "Default Config" setting.
3. In the panel on the left under Sales, select **Payment Methods**. Then, click to expand the **Authorize.Net** section.
4. Set **Allow Partial Authorization** to "Yes."
5. When complete, click the **Save Config** button.

Direct Post

Magento incorporates the Direct Post method for payments made through Authorize.Net. When payments are made using the Direct Post Method, the Authorize.Net gateway handles all steps in the transaction process, such as payment data collection, data submission, and response to the customer, while the customer remains in your store.

Admin Workflow

Authorize.Net Direct Post can be used with orders created from the Admin as well as from the store. When creating an order, you can select it in the Payment Method section of the order. After the option is selected, the credit card data entry fields appear. If the transaction fails, an error message appears, and you can select another payment method or try again with another card.

The order process is similar to the standard order workflow. As with other orders, and invoice, shipment, and credit memo can be created.

Customer Workflow

When enabled, the customer can select Authorize.Net Direct Post in the Payment Information section during checkout. During Order Review, the customer is prompted to enter the credit card information. After verifying the card information, the customer clicks the Place Order button.

If the transaction is successful, the customer is redirected to the order confirmation page. If the transaction fails for any reason, an error message appears. The customer can then select another payment method or try Authorize.Net Direct Post with a different credit card.

Checkout Using Authorize.Net Direct Post

To configure Direct Post:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. Set **Current Configuration Scope** to the website where the configuration is to be applied. To apply the configuration globally, accept the "Default Config" setting.
4. Click to expand the **Authorize.Net Direct Post** section.
5. Complete the settings as described in the following field descriptions.
6. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled	Website	Activates Authorize Direct Post Method within the Current Configuration Scope setting. Options include: Yes / No.
Payment Action	Website	Determines how payments are authorized in the Authorize.Net payment system and the entities that are created after the successful transaction. Options include:

FIELD	SCOPE	DESCRIPTION	
		Authorize Only	Funds on the customer's card are only authorized at the side of the Authorize.Net system and only an order is created in the backend of your store. You can later create an invoice and conduct the capturing.
		Authorize and Capture	Funds on the customer's card are authorized and captured at Authorize.Net side, and as a result an order and an invoice are created in the backend of your store.
Title	Store View	A label that identifies the payment method to customers during checkout.	
API Login ID	Website	Your Authorize.Net credentials.	
Transaction Key	Website	Your Authorize.Net credentials.	
Merchant MD5	Website	The MD5 Hash value enables Magento to verify that transaction responses are securely received from Authorize.Net. The MD5 Hash value is used by the payment gateway to encrypt responses for transactions, submitted for your account.You can set your MD5 Hash Value on the Authorize.Net website at Account > Settings > Security Settings > MD5-Hash.	
New Order Status	Website	The status assigned to all new orders that are created using this payment method.	
Test Mode	Website	Determines if the Direct Post Method is working in a test environment, or processing live transactions. Options include:	

FIELD	SCOPE	DESCRIPTION
		Yes — Sends a notification to Authorize.Net that orders should be sent to their test site. No — Orders are sent to Authorize.Net as live transactions. After testing transactions, don't forget to set Test Mode to "No," so you can process live transactions.
Gateway URL	Website	The URL to which order information is sent. the default URL is: https://secure.authorize.net/gateway/transact.dll. If you have a special test URL from Authorize.Net, you can set Test Mode to “No,” and specify the testing link in the Gateway URL field. However, the URL of the live site must be re-entered before going live.
Accepted Currency	Website	Make sure that the Accepted Currency field is set to “US Dollar,” because this is the only currency that Authorize.Net accepts.
Debug	Website	Determines if all communication with the payment system is recorded in a log file.
Email Customer	Website	Specify whether you want Authorize.Net to send emails to your customers on the completion of the checkout. This is in addition to the order confirmation email and other transactional email sent from Magento.
Merchant’s Email	Website	If you want to receive email notifications of orders placed with the Direct Post Method, from Authorize.Net, enter the email address that is associated with your account. If left blank, no email will be sent to you by Authorize.Net.
Credit Card Types	Website	Select the options that will appear in the Credit Card Type list during checkout. Options include: American Express

FIELD	SCOPE	DESCRIPTION
		Visa MasterCard Discover Other
Credit Card Verification	Website	Determines if customers are required to enter the Credit Card Verification number during checkout. Options include: Yes / No.
Payment from Applicable Countries	Website	Determines the countries from which you accept payment. Options include: All Allowed Countries / Specific Countries
Payment from Specific Countries	Website	Determines each country from which you accept payment. Only customers with a billing address in one of the selected countries can use this payment method.
Minimum Order Total	Website	Determines the minimum order total for orders processed with the Direct Post Method. The option appears only for orders that fall within the minimum and maximum range.
Maximum Order Total	Website	Determines the maximum order total for orders processed with the Direct Post Method. The option only for orders that fall within the minimum and maximum range.
Sort Order	Website	Determines the sequence in which the Direct Post Method is listed with other payment methods during checkout.

Customer Information Manager

Authorize.Net Customer Information Manager (CIM) is an additional option that is available to Magento installations that process transactions through Magento Secure Payment Bridge.

Customer Information Manager gives you the ability to securely save and manage customers' credit card information, either from the storefront or Admin. In addition, you can reuse the card information, which includes the credit card number, type, and expiration date, every time you check out with Authorize.Net. Authorize.Net also stores the shipping and billing addresses that are used with each credit card. You can view the information in the Customer Information Manager section of your merchant account on the Authorize.Net website.

Payment and order processing with CIM is similar to the standard workflow for Authorize.Net payments, including partial refunds. Online refunds can be created from the Invoice page. CIM restrictions include:

- 3D Secure Credit Card Validation is not available for the Authorize.Net payment method when CIM is enabled.
- Partial authorization, partial invoicing, and balance response are not available for the Authorize.Net payment method when CIM is enabled.

Customer Workflow

When Authorize.Net CIM is enabled and configured, the shopper's experience is as follows:

- When a logged-in customer uses Authorize.Net for the first time, the customer is prompted to enter credit card information, which is saved after the order is placed. The customer is informed that credit card information will be securely saved, but no confirmation is required.
- A logged in customer can view, delete, and add new cards to the saved profiles in the My Account section of the My Credit Cards tab.

On the My Credit Cards tab the information about credit cards used for checkout is stored and can be managed. A customer can reuse the saved card information, or enter a new card for each subsequent checkout with Authorize.Net. The CCV value is not saved and must be re-entered.

My Credit Card Profiles

Admin Workflow

All CIM capabilities are available for orders created from the store Admin. When a credit card is used for the first time, the information is saved in the customer's profile. Previously saved credit card information can be used for subsequent orders. However, CCV values are not saved and must be re-entered. The credit card information of each customer can be found at: Customers > Manage Customers. See the Credit Cards tab of the Customer Information page.

Balance Response Workflow

If the customer chooses Authorize.Net and uses one of the supported debit, prepaid, or a gift cards, the information about the balance and the amount put on hold or captured for this card is available for viewing. The balances appear in the customer's account dashboard, under My Account > My Orders. In the Payment Method block, see the Remaining Balance and Processed Amount fields.

The following credit card information is displayed:

- Credit Card Type
- Credit Card Number (only the last four digits of the card number are stored and displayed in Magento)
- Processed Amount
- Remaining Balance (if available)

Customer's Card Information During Checkout

The same information is also shown in the Payment Method section of transactional emails messages that are sent to the customer when an order is created, on the invoice, shipping notice, and credit memo. If the customer pays for the order with more than one credit card, by partial authorization, the information is included for each card that is used to make the payment. Similarly, the balance and the amount put on hold appear in the Payment Information block of the order view in the Admin.

Sometimes the balance information is not available, as might occur if the card issuer doesn't return the remaining balance to the customer's card. This typically occurs when the customer's card is a credit card. In such a case, the Remaining Balance field does not appear in the Admin or storefront.

CIM Setup

Authorize.Net CIM can be enabled at either the global or website level from the Admin. When configured globally, CIM is available to all customers of all websites in your Magento installation. If CIM is enabled only for a certain website, CIM is available only to customers who have registered on the website. To be able to use CIM with Authorize.Net, you must have:

- A merchant account with CIM supported and enabled in the Authorize.Net payment gateway
- Magento Secure Payment Bridge enabled and configured

> **Important!** Magento Payment Bridge stores only general information about credit cards, such as credit card type. All sensitive information is stored by the Authorize.Net gateway. To learn more, see: Payment Data Tokenization.

Authorize.Net with CIM enabled can be used by customers who are logged in to their accounts, as well as guest shoppers. Guest shoppers' credit card information is not saved.

Payment and Order Processing with CIM Enabled

Process Overview:

Step 1: Configure Authorize.Net for Payment Bridge

Step 2: Configure and Enable Payment Bridge

Step 1: Configure Authorize.Net for Payment Bridge

Use an SSH client to configure Authorize.Net for Magento Secure Payment Bridge. If Authorize.Net is already configured in Payment Bridge, then you need only to enable CIM. There is no need to re-enter the credentials. To learn more, see: Magento Secure Payment Bridge.

Step 2: Configure and Enable Payment Bridge

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. Click to expand the **Authorize.Net** section.
4. Set **Use via Payment Bridge** to "Yes."

   This option is available only if the payment method is configured to work with Payment Bridge.
5. When complete, click the **Save Config** button.

Additional Requirements

Because MasterCard and Discover modified their rules for processing debit, prepaid, and gift cards, Authorize.Net now requires merchants to add the following functionality to be in compliance with the new requirements:

- Balance response transactions
- Partial authorization transactions
- Authorization reversals

Merchants are required to provide support for authorization reversals only. Although no longer required, partial authorizations and balance responses are considered to be best practices, and Authorize.Net strongly recommends that merchants provide support for all three requirements.

Magento Enterprise Edition includes all three options, which are available for the Authorize.Net payment method. The following types of debit, prepaid, and gift cards are supported:

- MasterCard
- Discover
- Diners Club
- JCB
- Visa
- American Express (supporting only partial authorization and balance response transactions)

Balance response transactions, partial authorizations, and authorization reversals are provided for all merchants, regardless of location. Magento triggers the new functionality during the order creation process, and receives the appropriate response from Authorize.Net. The gateway receives a response from the bank to either approve or reject the new features.

Important! Balance response transactions, partial authorizations, and authorization reversals are available only if Authorize.Net is not configured to use Magento Secure Payment Bridge.

Notes

Chapter 57:

Payment Services

The following services provide enhanced security and payment processing services for your store.

Enhanced Security

3D Secure Credit Card Validation

3D Secure Credit Card Validation provides an additional layer of protection against fraudulent charges and chargebacks for sales. The service is available only for eligible payment gateways, and must be enabled in the gateway configuration.

Cardinal Centinel 3D Secure

Cardinal Centinel 3D secure credit card validation payment service is enabled and configured in the Magento Secure Payment Bridge.

PayPal Fraud Management Filters

Magento Enterprise Edition includes support for PayPal fraud management filters (FMFs), available for owners of Website Payments Pro PayPal accounts. It can be used with orders that are paid with either PayPal Express Checkout or Website Payments Pro.

Kount Fraud Detection Service

Kount Fraud Detection service is enabled and configured in Magento Secure Payment Bridge, and is used for all transactions managed by Magento Secure Payment Bridge.

3D Secure Credit Card Validation

Magento Enterprise Edition includes the option to use 3D Secure authentication for payment transactions made with Authorize.Net. Cardinal Centinel® is the company that provides the 3D Secure Credit Card Validation service.

> **Important!** If Authorize.Net is configured to work with Magento Secure Payment Bridge. 3D Secure and Customer Information Manager (CIM) cannot be enabled simultaneously. To learn more, see: Customer Information Manager (Saved Credit Card).

Customer Workflow

During the checkout process, the customer selects the Authorize.Net payment method, enters the credit card information, and clicks the Continue button. During Order Review, the bank that issued the credit card displays a form to verify the customer's identity. Depending on the bank's requirements, the customer might be required to enter a secret code, log in to an account, or complete another activity.

At checkout, the customer is prompted to enter a secret code that is assigned to the card, which is then used to confirm the identity of the cardholder. The bank also provides additional data elements to confirm the cardholder's identity. The service provider arranges the communication between the banks and payment systems. 3D Secure authentication can be used for orders placed from the store, or from the Admin. To learn more about the 3D Secure protocol, search by "Verified by Visa," "MasterCard SecureCode," and "J/Secure."

3D Secure Authentication for Customer

After submitting the form, the customer is returned to Order Review. The customer clicks the Place Order button. If the authentication succeeds, the customer proceeds to the order confirmation page. If the authentication fails for any reason, an error message appears and the customer can select another payment method or try again with Authorize.Net.

Admin Workflow

When creating an order from the Admin that uses 3D Secure with Authorize.Net, a form appears with the fields to enter the credit card information, and a Start/Reset Validation button.

3D Secure Authentication from the Admin

After you complete the credit card information, and click the Start/Reset Validation button, the bank that issued the credit card displays a form to verify the customer's identity. Depending on the bank's requirements, you might be required to enter a secret code, log in to an account, or complete another activity on behalf of the customer. If successful, a message indicates that the transaction has been validated, and you can proceed with the order.

3D Secure Setup

If Authorized.Net is configured to work with Magento Secure Payment Bridge, the 3D Secure configuration takes place from the Payment Bridge console. Otherwise, the configuration is managed from the store Admin.

Process Overview:

Step 1: Complete the 3D Secure Configuration

Step 2: Enable 3D Secure for Authorize.Net

Step 1: Complete the 3D Secure Configuration

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Services**.

3. To apply the configuration at the website level, set **Current Configuration Scope** in the upper-left corner, as needed. To apply the configuration at the global level, accept the "Default Config" setting.

4. Click to expand the **3D Secure Credit Card Validation** section. Then, do the following:

3D Secure Credit Card Validation

   a. Enter the following credentials that are required to connect to the Cardinal Centinel system:

      - Processor ID
      - Merchant ID
      - Password

   b. To test 3D Secure Validation before going live in the store, set **Test Mode** to "Yes."

   c. To save a log file of all interactions between your server and the Cardinal Centinel system, set **Debug Mode** to "Yes."

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Processor ID	Website	Specify the merchant processor identification code. This value is assigned to you by Cardinal Centinel.
Merchant ID	Website	Specify the merchant identification code. This value is also assigned to you by Cardinal Centinel.
Password	Website	Specify the password to connect to the Cardinal Centinel system.

FIELD	SCOPE	DESCRIPTION
Test Mode	Website	Choose whether the connection with the Cardinal Centinel system is tested prior to start the real life 3D Secure validation of payment transactions.
Debug Mode	Website	Saves a log file of all interaction between your server and the Cardinal Centinel system. Options include: Yes / No.

Step 2: Enable 3D Secure for Authorize.Net

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Payment Methods**.
3. To apply the configuration at the website level, set **Current Configuration Scope** in the upper-left corner as needed. To apply the configuration at the global level, accept the "Default Config" setting.
4. Click to expand the **Authorize.Net** section. Then, scroll down to the 3D Secure section. Then, do the following:

Enable 3D Secure Card for Authorize.Net

   a. Set **Enable 3D Secure Card Validation on Frontend** to "Yes."

   If you are use Magento Secure Payment Bridge, you can ignore the additional settings.

   b. In the **Severe 3D Secure Card Validation** field, specify if you want severe validation to be applied to credit card purchases made through the Centinel system. Severe validation removes merchant liability for any chargebacks that may occur.

   c. In the **Centinel API URL** field, enter the URL that was provided by Cardinal Centinel to establish the connection with their system.

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable 3D Secure Card Validation on Frontend	Website	Activates 3D Secure for use with Authorize.Net. Options Include: Yes / No.
Severe 3D Secure Card Validation	Website	Severe Validation removes chargeback liability from the merchant. Options include: Yes / No.
Centinel API URL	Website	Enter the URL provided in your 3D Secure agreement.

Enterprise
EDITION

Shipping

Chapter 58:

Basic Shipping Methods

Magento Enterprise Edition supports a wide range of shipping methods and carriers. In this chapter you will learn how to set up and use your store's basic shipping methods.

Topics in this chapter:

- Flat Rate
- Free Shipping
- Table Rates
- Online Rates

Before you proceed, make sure that you have completed the Shipping Settings to establish the point of origin for your store, and your preference for handling orders shipped to multiple addresses.

Flat Rate

Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple solution, especially when used with the flat-rate packaging that is available from some carriers.

Flat Rate

To set up flat rate shipping:

1. On the Admin menu, select **System > Configuration**. In the panel on the left, under Sales, select **Shipping Methods**.
2. Click to expand the **Flat Rate** section. Then, do the following:
   a. Set **Enabled** to "Yes."

      Flat Rate appears as an option in the Estimate Shipping and Tax section of the shopping cart, and also in the Shipping section during checkout.

   b. Enter a descriptive **Title** for this shipping method. The default is "Flat Rate."
   c. Enter a **Method Name** that appears next to the calculated rate in the shopping cart. The default method name is "Fixed." If you charge a handling fee, you can change the Method Name to "Plus Handling" or something else that is suitable.
   d. To describe how flat rate shipping can be used, set **Type** to one of the following:

None	Disables the payment type. The Flat Rate option is listed in the cart, but with a rate of zero, which is the same as free shipping.
Per Order	Charges a single flat rate for the entire order.
Per Item	Charges a single flat rate for each item. The rate is multiplied by the number of items in the cart, regardless of whether there are multiple quantities of the same, or of different items.

e. Enter the **Price** to be charged for the flat rate fee.

f. If charging a handling fee, set **Calculate Handling Fee** to one of the following:

- Fixed
- Percent

Then, enter the **Handling Fee** rate according to the method used to calculate the fee. For example, if the fee is calculating based on a percentage, enter 0.06 for 6 percent. If using a fixed amount calculation, enter the fee as a decimal.

g. In the **Displayed Error Message** box, type the message that appears if this method becomes unavailable.

h. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

i. Enter a **Sort Order** number to determine the position of Flat Rate in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

3. When complete, click the **Save Config** button.

Free Shipping

Free shipping is one of the most effective promotions you can offer. It can be based on a minimum purchase, or set up as a shopping cart price rule that applies when a set of conditions is met. If both apply to the same order, the configuration setting will take precedence over the shopping cart rule. Check your shipping carrier configuration for any additional settings that might be required for free shipping.

Free Shipping

To set up free shipping:

1. On the Admin menu, select **System > Configuration**. In the panel on the left, under Sales, select **Shipping Methods**.
2. Click to expand the **Free Shipping** section. Then, do the following:
   a. Set **Enabled** to "Yes."
   b. Enter a **Title** for this shipping method that will be displayed during checkout.
   c. Enter a descriptive **Method Name** to identify this shipping method.
   d. Enter the **Minimum Order Amount** to qualify for free shipping.

      To use Free Shipping with Table Rates, enter a Minimum Order Amount so high that it is never met. This prevents Free Shipping from going into effect, unless it is triggered by a price rule.
   e. In the **Displayed Error Message** box, type the message to appear if this method becomes unavailable.
   f. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

g. Set **Show Method if Not Applicable** to one of the following:

Yes	Always shows the Free Shipping method, even when not applicable.
No	Shows the Free Shipping method only when applicable.

h. Enter a **Sort Order** number to determine the position of Free Shipping in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

3. When complete, click the **Save Config** button.

4. Make sure that you complete any configuration that is required for each carrier you plan to use with free shipping. For example, assuming that your UPS configuration is otherwise complete, make the following settings to enable and configure free shipping:

   a. From the Shipping Methods configuration, click to expand the **UPS** section.

   b. In the UPS section, set **Free Method** to "Ground."

   c. To require a minimum order for free shipping, set **Free Shipping with Minimum Order Amount** to "Enable."

   d. Enter the required amount in the **Minimum Order Amount for Free Shipping** field.

5. When complete, click the **Save Config** button.

Table Rates

The table rate shipping method lets you set up a table to calculate shipping rates for a combination of conditions. The shipping rate can be based on the following:

- Weight v. Destination
- Price v. Destination
- # of Items v. Destination

For example, if your warehouse is located in Los Angeles, it costs less to ship to San Diego than to Vermont. You can use table rate shipping to pass the savings on to your customer.

> Only one set of table rate data can be active at a time.

The data that is used to calculate the rate is prepared in a spreadsheet and imported into your store. When the customer requests a quote, the results appear in the shipping estimate section of the shopping cart.

Example: Price v. Destination

This example uses the Price v. Destination condition to create a set of three different shipping rates based on the amount of the order subtotal for the continental United States, Alaska, and Hawaii. The asterisk (*) is a wildcard that represents all values.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	ORDER SUBTOTAL (AND ABOVE)	SHIPPING PRICE
USA	*	*	0	15
USA	*	*	50	10
USA	*	*	100	5
USA	AK	*	0	20
USA	AK	*	50	15
USA	AK	*	100	10
USA	HI	*	0	20
USA	HI	*	50	15
USA	HI	*	100	10

Table Rate in Shopping Cart

Process Overview:

Step 1: Complete the Default Settings

Step 2: Prepare the Table Rate Data

Step 3: Import the Table Rate Data

Step 1: Complete the Default Settings

The first step is to complete the default settings for table rates. You can complete this step without changing the scope of the configuration.

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Shipping Methods**.
3. Click to expand the **Table Rates** section. Then, do the following:
   a. Set **Enabled** to "Yes."
   b. Enter a **Title** for the section of table rates that appears during checkout. (The default title is "Best Way.")
   c. Enter the **Method Name** that appears next to the calculated rate in the shopping cart.
   d. Set **Condition** to one of the following calculation methods:
      - Weight v. Destination
      - Price v. Destination
      - # of Items v. Destination

e. For orders that include virtual products, set **Include Virtual Products in Price Calculation** to "Yes" if you want to be able to include the virtual product(s) in the calculation.

   Because virtual products—such as services—have no weight, they cannot change the result of a calculation that is based on the Weight v. Destination condition. However, virtual products can change the result of a calculation that is based on either the Price v. Destination or # of Items vs Destination condition.

f. If charging a handling fee, set **Calculate Handling Fee** to one of the following:

   - Fixed
   - Percent

   Then, enter the **Handling Fee** rate according to the method used to calculate the fee.

   If the handling fee is based on a percent, enter the whole number *without* the percent sign.

g. In the **Displayed Error Message** box, type the message that appears when this method is not available.

h. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

i. Enter a **Sort Order** number to determine where table rates appear in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

4. When complete, click the **Save Config** button.

Table Rates

Step 2: Prepare the Table Rate Data

1. In the upper-left corner, set **Current Configuration Scope** to the "Main Website," or any other website where you want the configuration to apply.

   Export and Import options appear in the Table Rates section, with "Use Default" checkboxes to the right of each option. To change any of the current settings, clear the "Use Default" checkbox next to the field.

2. If you want to change the **Condition**, clear the **Use Default** checkbox. Then, select another option.

3. Click the **Export CSV** button. Then, save the **tablerates.csv** file to your computer.

Export CSV

4. Open the file in Excel, or any other spreadsheet program.

5. Complete the table with appropriate values for the shipping calculation condition being used.

   - You can use an asterisk (*) as a wildcard to represent all possible values in any category.
   - The Country column must contain a valid three-character code for each row.

table-rates-weight-vs-destination

	A	B	C	D	E
1	Country	Region/State	Zip/Postal Code	Weight (and above)	Shipping Price
2	USA	*	*	0	5
3	USA	*	*	10	10
4	USA	*	*	20	15
5					
6					

tablerates (1)

Weight vs. Destination

6. When complete, save the **tablerates.csv** file.

Step 3: Import the Table Rate Data

1. Return to the **Table Rates** section of your store configuration.

2. In the upper-left corner, set **Current Configuration Scope** to the website where this method will be used.

3. Next to the **Import** field, click the **Choose File** button. Select your completed **tablerates.csv** file, and import the rates.

Import Table Rates

4. When complete, click the **Save Config** button. Then, go through the payment process with different addresses to make sure the shipping and handling rates are correct.

Online Rates

Magento offers dynamic retrieval of rates from various shipping providers. Most shipping providers require that you open an account to use online rates. Consult your shipping provider to learn how to obtain API credentials.

To enable and configure these shipping methods, expand the appropriate tabs (UPS, USPS, FedEx, or DHL) and configure the settings. The configuration of this method is similar to the configuration of a Flat Rate. The exact options depend on the service provider. To learn more, contact the specific provider.

Dimensional Weight

Dimensional weight pricing is a common industry practice that bases the transportation price on package volume. Dimensional weight calculates the shipping rate based on the amount of space a package occupies in the cargo area of the carrier. and is typically used when a package is relatively light compared to its volume. Both UPS and FedEx apply dimensional weight to shipments.

Although Magento does not automatically calculate dimensional weight, it can be easily calculated manually. You can also install a shipping extension from Magento Connect that supports dimensional weight.

To calculate dimensional weight:

1. Calculate the package **length** x **width** x **height** in inches.
2. Do one of the following:
   - Divide by **166** (for the U.S. and Puerto Rico)
   - Divide by **139** for international shipments.
3. Use the calculated value as the **Weight** of the package.

Chapter 59:

Shipping Carriers

If you have a commercial account with a supported carrier, you can offer your customers the convenience of choosing that carrier during checkout. The rates are automatically downloaded, so you do not need to look up the information.

Before you can offer your customers a selection of shipping carriers, you must first complete the shipping settings to establish the point of origin for your store. Then, complete the configuration for each carrier service that you want to offer. The configuration options vary for each carrier. However, all require that you first open a shipping account with the carrier, and enter your account number or user ID, and the gateway URL to their system into the configuration of your store.

See Magento Connect for additional shipping services for your Magento Enterprise Edition installation.

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.

USPS

The United States Postal Service is the independent postal service of United States government. USPS offers domestic and international shipping services by land and air.

FedEx

Offers domestic and international shipping services by land and air to more than 220 countries.

DHL

Offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries. This article provides step-by-step instructions for setting up the UPS shipping method for your store.

UPS now uses dimensional weight to determine some shipping rates.

Process Overview:

Step 1: Open a UPS Shipping Account
Step 2: Enable UPS for Your Store
Step 3: Complete the Container Description
Step 4: Set Up Handling Fees
Step 5: Specify Allowed Methods and Applicable Countries

Step 1: Open a UPS Shipping Account

To offer this shipping method to your customers, you must first open an account with UPS.

Step 2: Enable UPS for Your Store

1. On the Admin menu, select **System > Configuration.**
2. In the Configuration panel on the left, under Sales, click **Shipping Methods.**
3. Click to expand the **UPS** section.
4. Set **Enabled** to "Yes."
5. For a standard UPS account, set **UPS Type** to "United Parcel Service." Then in the **Gateway URL** field, enter the URL that is used to calculate UPS shipping rates. This field is preset by default, and normally does not need to be changed.

   To generate shipping labels, UPS Type must be set to "United Parcel XML."

6. For a UPS XML account, do the following:
   a. Set **UPS Type** to "United Parcel Service XML."
   b. Enter the following UPS credentials:
      - User ID
      - Access License Number
      - Password

c. Set **Mode** to "Live" to send data to the UPS shipping system over a secure connection. (Development mode does not send data over a secure connection.)

d. Verify the **Gateway XML URL** that is required to send requests by XML file.

e. Set **Order of Shipment** to the region where the shipment originates.

f. If you have special rates with UPS, set **Enable Negotiated Rates** to "Yes." Then, enter the six-digit **Shipper Number** assigned to you by UPS.

Step 3: Complete the Container Description

1. In the **Title** field, type the name of this shipping option that appears during checkout. By default, this field is set to "United Parcel Service."
2. Set **Packages Request Type** to one of the following:
   - Use origin weight (few requests)
   - Divide to equal weight (one request)
3. In the **Container** field, specify the typical packaging type that is used for shipment.
4. Set **Destination Type** to one of the following:

Residential	Most of your shipments are business to consumer (**B2C**[1]).
Commercial	Most of your shipments are business to business (**B2B**[2]).
Define Automatically	UPS determines the destination type as either residential or commercial, and uses the appropriate rate from the merchant's UPS account during checkout.

5. Set **Weight Unit** to the system you use to measure product weight. The weight system supported by UPS varies by country. If in doubt, ask UPS which weight system you should use. Options include:
   - LBS
   - KGS
6. Set **Pickup Method** to one of the following:
   - Regular Daily Pickup
   - On Call Air
   - One Time Pickup

[1]Business to Consumer: Business transactions between a business entity and a consumer.

[2]Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

- Letter Center
- Customer Counter

7. Enter the **Maximum Package Weight** allowed by the carrier.
8. Enter the **Minimum Package Weight** allowed by the carrier.

Step 4: Set Up Handling Fees

1. Set **Calculate Handling Fee** to one of the following methods:
   - Fixed
   - Percent
2. To determine how the handling fee is applied, set **Handling Applied** to one of the following:
   - Per Order
   - Per Package
3. Enter the amount of the **Handling Fee** to be charged. To enter a percentage, use the decimal format. For example, enter 0.25 for 25%.

Step 5: Specify Allowed Methods and Applicable Countries

1. In the **Allowed Methods** list, select each UPS method offered to your customers. The methods appear under UPS during checkout. (Hold the Ctrl key down to select multiple options).
2. Set **Free Method** to the UPS service you want to use for offers of free shipping. Then, do one of the following:
   - Set **Free Shipping with Minimum Order Amount** to "Enable." Then, enter the **Minimum Order Amount for Free Shipping.**
   - Set **Free Shipping with Minimum Order Amount** to "Disable."
3. In the **Displayed Error Message box**, type the message customers see if UPS shipping becomes unavailable.
4. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

5. To create a log file with the details of UPS shipments made from your store, set **Debug** to "Yes."
6. Set **Show Method if Not Applicable** to one of the following:

Yes	To list all UPS shipping methods to customers, regardless of their availability.
No	To list only the methods which are available to customers.

7. In the **Sort Order** field, type a numeric value to determine the order in which UPS appears when listed with other shipping methods during checkout. The number with the highest priority is 0, which puts it at the top of the list.
8. When complete, click the **Save Config** button.

UPS Shipping Configuration

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled for Checkout	Website	Enables/disables UPS as a shipping method available to customers during checkout. Options include: Yes / No.
Enabled for RMA	Website	Enables/disables the ability to use UPS as a

FIELD	SCOPE	DESCRIPTION	
		shipping method for returned merchandise. Options include: Yes /No.	
UPS Type	Website	Specifies the method used to connect to the UPS shipping system. The available options are:	
		United Parcel Service	Your store sends key-value pairs to UPS as a request.
		United Parcel Service XML	Your store sends an XML file with data to UPS as a request.
Gateway URL	Website	United Parcel Service	The URL used to connect to the UPS system and retrieve shipping rates dynamically.
		United Parcel Service XML	For UPS XML service, displays the following URLs that are required to transmit XML data: Gateway XML URL Tracking XML URL Shipping Confirm XML URL Shipping Accept XML URL
UserID	Website	(For UPS XML service.) Your UPS shipper account user ID.	
Access License Number	Website	(For UPS XML service.) Your UPS shipper account access license number.	
Origin of the Shipment	Website	(For UPS XML service.) The country or region where the product shipment originates.	
Mode	Website	(For UPS XML service.) Sets the mode of transmission for data sent to the UPS system.	

FIELD	SCOPE	DESCRIPTION
		Live — Data is insecurely sent to UPS. Development — Data is securely sent to UPS.
Password	Website	(For UPS XML service.) Your UPS shipper account password.
Enable Negotiated Rates	Website	(For UPS XML service.) Enables / disables special rates, according to your agreement with UPS. Options include: Yes / No.
Title	Store View	The title of this shipping option as it appears in the shopping cart checkout.
Packages Request Type	Website	Options include: Divide to equal weight (one request) Use origin weight (few requests)
Shipper Number	Website	(For UPS XML service.) The Shipper number is required for reference if using negotiated rates.
Container	Website	Sets the container type used to package order shipments. Options include: Customer Packaging UPS Letter Envelope Customer Packaging UPS Letter Envelope UPS Tube UPS Express Box UPS Worldwide 25 kilo UPS Worldwide 10 kilo
Destination Type	Website	Sets the default shipment destination type. Options include: Business / Residential
Weight Unit	Website	Sets the default unit of measurement for product weight in your store.
Pickup Method	Website	Sets the UPS pickup method. Options include: Regular Daily Pickup On Call Air

FIELD	SCOPE	DESCRIPTION
		One Time Pickup Letter Center Customer Counter
Maximum Package Weight	Website	Sets the maximum weight that a package can be as specified by UPS. If the products ordered exceeds the maximum package weight, this shipping option is not available. According to UPS.com, packages cannot exceed 150lbs (70kg) Check with your shipping carrier to verify the maximum weight.
Minimum Package Weight	Website	Sets the minimum weight that a package can be as specified by UPS. If the products ordered weigh less than the minimum package weight, this shipping option will not be available. Check with your shipping carrier to verify the minimum weight.
Calculate Handling Fee	Website	Sets the handling fee calculation method for table rate shipping. Fixed — Handling fee is a fixed rate. Percent — Handling fee is applied as a percentage of the order amount.
Handling Applied	Website	Specifies whether handling fee is applied to each order or to each package within an order.
Handling Fee	Website	Sets the handling that is included with the shipping rate price. Handling fee can be set as a fixed amount or a percentage. If typing a percentage amount, use the decimal format 0.25 for 25%.
Allowed Methods	Website	Specifies the allowed methods of UPS shipping that are offered to customers. Shipping rates will be calculated based on the selected shipping method.
Free Method	Website	Sets the free shipping method through UPS, or

FIELD	SCOPE	DESCRIPTION
		can be disabled by selecting None. This shipping method is similar to the regular Free Shipping method, however it will be listed within the UPS shipping options and is identified as UPS shipping.
Free Shipping with Minimum Order Amount	Website	Enables or disables conditional free shipping that depends on meeting a minimum order amount.
Minimum Order Amount for Free Shipping	Website	Sets the minimum total order amount that must be met to qualify an order for free shipping.
Displayed Error Message	Store View	The error message that is displayed when this shipping method is unavailable for any reason.
Ship to Applicable Countries	Website	Specifies which country customers are allowed to use this shipping method. All Allowed Countries: Customers from all countries specified in your store configuration can use this shipping method. Specific Countries: After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.
Debug	Website	Specifies if data transmissions between your store and UPS are logged in the system for debugging. Unless there is an issue that needs to be tracked and logged, this should be set to “No.”
Show Method if Not Applicable	Website	Options include:

FIELD	SCOPE	DESCRIPTION	
		Yes	UPS always appears as a shipping option during checkout, even if not applicable to the order.
		No	UPS appears as a shipping option during checkout only if applicable to the order. (For example, if the order weight exceeds the maximum weight amount.)
Sort Order	Website	Sets the sort order value for this shipping method. This value, relative to other shipping methods, determines the displayed order of shipping options in checkout. Shipping methods are displayed in ascending order based on sort order value. Enter 0 for the top of the list.	

USPS

The United States Postal Service is the independent postal service of United States government, offering domestic and international shipping services by land and air. This article provides step-by-step instructions for setting up the USPS shipping method.

Process Overview:

Step 1: Open a USPS Shipping Account
Step 2: Enable USPS for Your Store
Step 3: Complete the Container Description
Step 4: Specify Allowed Methods and Applicable Countries

Step 1: Open a USPS Shipping Account

1. Open a USPS Web Tools account. After you complete the registration process, you will receive your User ID and a URL to the USPS test server.
2. You can skip the testing phase, and contact their Internet Customer Care Center to request immediate activation to the production server. The ICCC will validate your store, and send you the URL to the production server.

   To learn more about USPS Web Tools, see their Ecommerce API Technical Guides.

Step 2: Enable USPS for Your Store

1. On the Admin menu, select **System > Configuration.**
2. In the Configuration panel on the left, under Sales, click **Shipping Methods.**
3. Click to expand the **USPS** section. Then, do the following:
   a. Set **Enabled** to "Yes."
   b. The **Gateway URL** is needed to access USPS shipping rates. The field is preset by default, and normally does not need to be changed.
   c. Enter a **Title** for this shipping method that will appear during checkout.
   d. Enter the **User ID** for your USPS account.

Step 3: Complete the Container Description

1. Set **Container** to the type of packaging usually used to ship products ordered for your store. Options include:
   - Variable
   - Flat-Rate Box
   - Flat-Rate Envelope
   - Rectangular
   - Non-Rectangular
2. Set the **Size** of the typical package shipped from your store. Options include:
   - Regular
   - Large
   - Oversize
3. Set **Machinable** to one of the following:

Yes	If your typical package can be processed by a machine.
No	If your typical package must be processed manually.

Step 4: Specify Allowed Methods and Applicable Countries

1. In the

FIELD	SCOPE	DESCRIPTION
		shipments. Options include: Variable Flat Rate Box Flat Rate Envelope Rectangular Non-rectangular
Size	Website	Sets the Size option to the typical shipment package size. This option affects the calculation of the shipping rate. Options include: Regular Large Oversize
Machinable	Website	Specifies whether the package can be processed by machine. This option affects the calculation of the shipping rate.
Maximum Package Weight	Website	Sets the maximum weight that a package can be as specified by USPS. If the products ordered exceeds the maximum package weight, this shipping option will not be available.
Calculate Handling Fee	Website	Sets the handling fee calculation method for table rate shipping. Fixed — Handling fee is a fixed rate. Percent — Handling fee is applied as a percentage of the order amount.
Handling Applied	Website	Specifies whether handling fee is applied to each order or to each package within an order.
Handling Fee	Website	Sets the handling that is included with the shipping rate price. Handling fee can be set as a fixed amount or a percentage. When typing a percentage amount, use the decimal format 0.25 for 25%.
Allowed Methods	Website	Specifies the allowed methods of USPS shipping that is offered to customers. Shipping

FIELD	SCOPE	DESCRIPTION
		rates are calculated based on the selected shipping method.
Free Method	Website	Sets the free shipping method through USPS, or can be disabled by selecting "None." This shipping method is similar to your store's Free Shipping method, however it is listed as aUSPS shipping option, and identified as USPS shipping.
Free Shipping with Minimum Order Amount	Website	Enables or disables conditional free shipping that depends on meeting a minimum order amount.
Minimum Order Amount for Free Shipping	Website	Sets the minimum total order amount that must be met to qualify an order for free shipping.
Displayed Error Message	Store View	The error message that appears when USPS is unavailable for any reason.
Ship to Applicable Countries	Website	Specifies the countries where orders can be shipped. All Allowed Countries: Customers from all countries specified in your store configuration can use this shipping method. Specific Countries: After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.
Show Method if Not Applicable	Website	Controls the display of USPS shipping during checkout. Options include:

FIELD	SCOPE	DESCRIPTION	
		Yes	USPS always appears as a shipping option during checkout, even if not applicable to the order.
		No	USPS does appears as a shipping option during checkout only if applicable to the order. (i.e. Order weight exceeds the maximum weight amount).
Debug	Website	Specifies if data transmissions between your store and USPS will be logged in the system for debugging. Unless there is an issue that needs to be tracked and logged, this should be set to “No.”	
Sort Order	Website	Sets the sort order value for this shipping method. This value, relative to other shipping methods, determines the displayed order of shipping options in checkout. Shipping methods appear in ascending order, based on sort order value. Enter 0 for the top of the list.	

FedEx

FedEx is one of the world's largest shipping service companies, providing air, freight, and ground shipping services with several levels of priorities. This article provides step-by-step instructions for setting up the FedEx shipping method for your store.

FedEx now uses dimensional weight to determine some shipping rates.

Process Overview:

Step 1: Register for FedEx Web Services Production

Step 2: Enable FedEx for Your Store

Step 3: Complete Package Description and Handling Fee

Step 4: Specify Allowed Methods and Applicable Countries

Step 1: Register for FedEx Web Services Production

You must create a FedEx merchant account and register for FedEx Web Services Production Access. After creating a FedEx account, read through the production account information page, then click the Obtain Production Key link at the bottom of the page to register and obtain a key.

Make sure to copy or write down the authentication key. You will need it to set up FedEx in your Magento shipping settings.

Step 2: Enable FedEx for Your Store

1. On the Admin menu, select **System > Configurations**. Then in the Configuration panel on the left, under Sales, select **Shipping Methods.**
2. Click to expand the **FedEx** section, and do the following:
   a. To activate the FedEx shipping method, set **Enabled for Checkout** to "Yes."
   b. Set **Enabled for RMA** to "Yes" or "No" depending on whether or not you want to use this shipping method for returns.
   c. Enter an appropriate **Title** to identify this shipping method during checkout.
   d. Enter the following information from your FedEx account:
      - Account ID
      - Meter Number
      - Key
      - Password

e. If you have set up a FedEx sandbox and want to work in the testing environment, set **Sandbox Mode** to "Yes."

> Remember to set Sandbox Mode to "No" when you are ready to offer FedEx as a shipping method to your customers.

Step 3: Complete Package Description and Handle Fee

1. Select the **Packages Request Type**.
2. Select the type of **Packaging** typically used to ship products from your store. Options include:
   - FedEx Envelope
   - FedEx Pak
   - FedEx Box
   - FedEx Tube
   - FedEx 10kg Box
   - FedEx 25kg Box
   - Your Packaging
3. Set **Dropoff** to the pick-up method that will be used for delivery. Options include:

Regular Pickup	If you have a high volume of shipments, it can be cost effective to make arrangements with FedEx for regular pickups.
Request Courier	You must call and request a FedEx courier to pick-up shipments.
Drop Box	You must drop off shipments at your nearby FedEx drop box.
Business Service Center	You must drop off shipments at your local FedEx business service center.
Station	You must drop off shipments at your local FedEx station.

4. Enter the **Maximum Package Weight** allowed for FedEx shipments. The default FedEx maximum weight is 150 lbs. Please consult your shipping carrier for more information. We recommend using the default value, unless you have made special arrangements with FedEx.
5. An optional handling fee can be added to the amount charged by FedEx, which is not t visible during checkout. If you want to charge a handling fee, do the following:

   a. Set **Calculate Handling Fee** to one of the following:
      - Fixed Fee
      - Percentage

b. In the **Handling Applied** list, choose one of the following methods for managing handling fees:

- Per Order
- Per Package

c. Enter the **Handling Fee** as either a fixed amount or percentage, depending on the method of calculation.

6. Set **Residential Delivery** to one of the following, depending on whether you sell Business-to-Consumer (**B2C**[1]) or Business-to-Business (**B2B**[2]).

Yes	For B2C residential deliveries.
No	For B2B residential deliveries.

Step 4: Specify Allowed Methods and Applicable Countries

1. Set **Allowed Methods** to each method of shipment that you want to offer. When choosing methods, take into consideration your FedEx account, the frequency and size of your shipments, and if you allow international shipments. You can offer as many or as few methods as you want.

2. To set up free shipping through FedEx, do the following:

a. Set **Free Method** to any shipping method that you want to offer your customers at no charge. You may also select **None**. This is similar to Free Shipping, however it is listed in the FedEx section, so customers will know exactly which method is being used for their order.

b. The **Free Shipping with Minimum Order Amount** option allows you to offer free FedEx shipping for orders that meet a minimum amount.

Enable	Lets you set the minimum amount for orders to qualify for free shipping.If an order does not meet the minimum amount, FedEx Free Shipping will still appear as an option,however it will be set to an amount determined by FedEx.
Disable	Does not let you set a minimum amount for orders to qualify for free shipping.

c. If you choose "Enable," enter the minimum order amount in the **Minimum Order Amount for Free Shipping**.

---

[1]Business to Consumer: Business transactions between a business entity and a consumer.

[2]Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

d. The **Displayed Error Message** text box is preset with a default message. You can leave this as is or edit as needed.

e. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

f. Set **Debug** to "Yes" or "No."

g. Set **Show Method if Not Applicable** to one of the following:

Yes	To list all UPS shipping methods to customers, regardless of their availability.
No	To list only the methods which are available to customers.

h. Enter a **Sort Order** numeric value to determine the sequence in which UPS appears when listed with other shipping methods during checkout. The number with the highest priority is 0, which puts it at the top of the list.

3. When the configuration is complete, click the **Save Config** button.

FedEx

Enabled for Checkout	Yes	[WEBSITE]
Enabled for RMA	Yes	[WEBSITE]
Title	Federal Express	[STORE VIEW]
Account ID	Please make sure to use only digits here. No dashes are allowed.	[WEBSITE]
Meter Number		[WEBSITE]
Key		[WEBSITE]
Password		[WEBSITE]
Sandbox Mode	Yes	[WEBSITE]
Packages Request Type	Divide to equal weight (one request)	[WEBSITE]
Packaging	Your Packaging	[WEBSITE]
Dropoff	Regular Pickup	[WEBSITE]
Weight Unit	Pounds	[WEBSITE]
Maximum Package Weight (Please consult your shipping carrier for maximum supported shipping weight)	150	[WEBSITE]
Calculate Handling Fee	Fixed	[WEBSITE]
Handling Applied	Per Order	[WEBSITE]
Handling Fee		[WEBSITE]
Residential Delivery	No	[WEBSITE]
Allowed Methods	Europe First Priority 1 Day Freight 2 Day Freight 2 Day 2 Day AM 3 Day Freight Express Saver Ground First Overnight Home Delivery	[WEBSITE]
Hub ID	The field is applicable if the Smart Post method is selected.	[WEBSITE]
Free Method	Ground	[WEBSITE]
Free Shipping with Minimum Order Amount	Disable	[WEBSITE]
Minimum Order Amount for Free Shipping		[WEBSITE]
Displayed Error Message	This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.	[STORE VIEW]
Ship to Applicable Countries	All Allowed Countries	[WEBSITE]
Ship to Specific Countries	Afghanistan Åland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda	[WEBSITE]
Debug	No	[WEBSITE]
Show Method if Not Applicable	No	[WEBSITE]
Sort Order		[WEBSITE]

FedEx Configuration

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled for Checkout	Website	Enables/disables the FedEx shipping method.
Title	Store View	The title of this shipping option as it appears in the shopping cart checkout.
Account ID	Website	FedEx account ID, provided to you by FedEx.
Meter Number	Website	FedEx meter number, provided to you by FedEx.
Key	Website	FedEx account key, provided to you by FedEx.
Password	Website	Password, provided to you by FedEx.
Sandbox Mode	Website	To run FedEx transactions in a testing environment, set Sandbox Mode to "Yes." Options include: Yes / No.
Packaging	Website	From the list, select the container type that you typically use to package products ordered from your store.
Dropoff	Website	From the list, select the pick-up method: Regular Pickup: If you have a high volume of shipments, it can be cost effective to arrange regular pickups. Request Courier — You must call and request a FedEx courier to pick up shipments. Drop Box — You must drop off shipments at your local FedEx drop box. Request Courier — You must call and request a FedEx courier to pick up shipments. Drop Box: You must drop off shipments at your local FedEx drop box. Business Service — You must drop off

FIELD	SCOPE	DESCRIPTION
		Center — shipments at your local FedEx business service center. Station — You must drop off shipments at your local FedEx station.
Maximum Package Weight	Website	The default for FedEx is 150 pounds. Consult your shipping carrier for maximum supported weight. Using the default value is recommended unless you have special arrangements with FedEx.
Calculate Handling Fee	Website	From the list, select the method to use to calculate handling fees:. Options include: Fixed Fee / Percentage The handling fee is optional, and appears as an additional charge that is added to the FedEx shipping cost.
Handling Applied	Website	From list, select a method for determining handling fees. Options include: Per Order / Per Package.
Handling Fee	Website	Enter the amount to be charged for a handling fee, based on the method you chose for calculating the amount. For example, if the charge is based on a fixed fee, enter the amount as a decimal, such as 4.90. If the handling fee is based on a percentage of the order, enter the amount as a percentage. For example, if you are charging six percent of the order, enter the value as .06.
Residential Delivery	Website	Set to one of the following, depending on whether you sell Business-to-Consumer (B2C) or Business-to-Business (B2B): Yes — For B2C deliveries No — For B2B deliveries
Send Declared Value	Website	Set Send Declared Value to "Yes" to include the

FIELD	SCOPE	DESCRIPTION
		declared value with the shipment. Options include: Yes / No.
Allowed Methods	Website	In the list, select the methods of shipment that you support. This depends on your FedEx account, the frequency and size of your shipments, and whether you allow international shipments. As the merchant, you might decide to offer ground shipping only. Europe First Priority 1 Day Freight 2 Day Freight 2 Day 2 Day AM 3 Day Freight Express Saver Ground First Overnight Home Delivery Intl Economy Intl Economy Freight Intl First Intl Ground Intl Priority Intl Priority Freight Priority Overnight Smart Post* Standard Overnight Freight National Freight * When offering the Smart Post method, you must enter the Hub ID.
Free Method	Website	From the list, select the shipping method you prefer to use for offers of free shipping. This shipping method is similar to the regular Free Shipping method, however it is listed within the FedEx shipping options and is identified as FedEx shipping.
Free Shipping with Minimum Order Amount	Website	Set to one of the following: Enable — Enables free FedEx shipping for orders that meet the minimum amount. Disable — Disables free FedEx shipping with minimum order.

FIELD	SCOPE	DESCRIPTION	
Minimum Order Amount for Free Shipping	Website	If you enable Free Shipping with Minimum Order, enter the minimum order amount value in the field.	
Displayed Error Message	Store View	Type a message that is displayed when this shipping method is unavailable for any reason. Keep the default or customize it as needed.	
Ship to Applicable Countries	Website	Specifies in which countries customers are allowed to use this shipping method.	
		All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
		Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.
Ship to Specific Countries	Website	The Ship to Specific Countries list appears when the Specific Countries option is selected. Select each country where you offer shipping by FedEx. (To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.)	
Show Method if Not Applicable	Website	Options include:	
		Yes	The FedEx shipping option is displayed in the shipping methods list, regardless of whether the order qualifies to use it.
		No	The FedEx shipping option is not displayed in the shipping methods

FIELD	SCOPE	DESCRIPTION
		list if it is not applicable to the order (for example, if the order weight exceeds the maximum weight amount).
Sort Order	Website	Sets the sort order value for this shipping method. This value, relative to other shipping methods, determines the displayed order of shipping options in checkout. Shipping methods are displayed in ascending order based on sort order value. Enter 0 for the top of the list.

DHL

DHL offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information. This article provides step-by-step instructions for setting up the DHL shipping method for your store.

Process Overview:

Step 1: Enable DHL for Your Store
Step 2: Complete Package Description and Handling Fee
Step 3: Specify Allowed Shipping Methods
Step 4: Specify Applicable Countries

Step 1: Enable DHL for Your Store

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Shipping Methods**.
3. Click to expand the **DHL** section. Then, do the following:
   a. Set **Enabled for Checkout** to "Yes."
   b. In the **Title** field, type a name that will be used to refer to this shipping method during checkout.
   c. In most cases, you can accept the default **Gateway URL**. However, if DHL has given you an alternate URL, enter the value in this field.
   d. Use the credentials provided by DHL to complete the following fields:
      - Access ID
      - Password
      - Account Number

Step 2: Complete Package Description and Handling Fee

1. In the **Content Type** list, select the option that best describes the type of package you ship:
   - Documents
   - Non documents
2. The handling fee is optional, and appears as an additional charge that is added to the DHL shipping cost. If you want to include a handling fee, do the following:

a. In the **Calculate Handling Fee** list, select the method you want to use to calculate handling fees:

- Fixed
- Percentage

b. In the **Handling Applied** list, select how you want the handling fees applied:

- Per Order
- Per Package

c. In the **Handling Fee** field, enter the amount to be charged, based on the method you have chosen to calculate the amount. For example, if the charge is based on a fixed fee, enter the amount as a decimal, such as: 4.90. However, if the handling fee is based on a percentage of the order, enter the amount as a percentage. For example, if you are charging six percent of the order, enter the value as: .06.

3. To allow the total order weight to be broken up to ensure an accurate calculation of shipping charges, .set **Divide Order Weight** to "Yes." Then, set the **Weight Unit** of the package to one of the following:

- Pounds
- Kilograms

4. Set the **Size** of the package to one of the following:

- Regular
- Specific

If you are using **Specific**, enter the **Height**, **Depth**, and **Width** of the package. Specify these numbers in centimeters.

Step 3: Specify Allowed Shipping Methods

1. In the **Allowed Methods list**, select each shipment method that you support. (Hold the Ctrl key down to select multiple options.)

To display the correct list of shipping methods, you must first specify the Country of Origin in Shipping Settings.

2. Enter the **Ready Time** in hours after submission, that it takes for a package to be ready to ship.

3. Edit the **Displayed Error Message** as needed. This message appears when a selected method is unavailable.

4. In the **Free Method** list, select the shipping method you prefer to use for offers of free shipping. Then, set the **Free Shipping with Minimum Order Amount** to one of the following:

Enable	If offering Free Shipping with Minimum Order, enter the **Minimum Order Amount for Free Shipping**.
Disable	Does not apply free DHL shipping to any orders.

This is similar to the standard Free Shipping method, but appears in the DHL section so customers know which method is used for their order.

5. Enter the **Minimum Order Amount for Free Shipping** that must be met for a package to qualify.

Step 4: Specify Applicable Countries

1. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

2. Set **Show Method if Not Applicable** to one of the following:

Yes	Displays all options,even if not applicable to the order.
No	Displays only applicable options.

3. In the **Sort Order** field, type a numeric value to determine the sequence in which DHL appears when listed with other shipping methods during checkout.
4. To create a log file with the details of DHL shipments made from your store, set **Debug** to "Yes."
5. When complete, click the **Save Config** button to save your changes.

DHL Configuration

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled for Checkout	Website	Enables/disables the DHL shipping method.
Title	Store View	The title of this shipping method as it appears during checkout.
Gateway URL	Website	In most cases, you can accept the default Gateway URL. However, if DHL has given you an alternate URL, enter the value in this field.
Access ID	Website	The DHL shipper account access ID, provided to you by DHL.

FIELD	SCOPE	DESCRIPTION	
		Regular	Packages shipped conform to of DHL's standard packaging methods. In the Allowed Methods list, select each packaging method used to ship products from your store.
		Specific	If packages shipped have custom dimensions, complete the following: Height (cm) Depth (cm) Width (cm)
Allowed Methods	Website	In the list, select each shipment method that you support.	
Ready Time	Website	Specifies when the package will be ready for pickup, in hours, after an order is submitted.	
Displayed Error Message	Store View	This message appears when DHL becomes unavailable for any reason. You can use the default message or enter a message of your own.	
Free Method		This shipping method is similar to the regular Free Shipping method, however it is listed within the DHL shipping options and is identified as DHL shipping. In the list, select the shipping method you prefer to use for offers of free shipping.	
Free Shipping with Minimum Order Amount	Website	Set to one of the following:	
		Enable	To allow free DHL shipping for orders that meet the minimum amount.
		Disable	To not offer free DHL shipping with minimum order.

FIELD	SCOPE	DESCRIPTION
Minimum Order Amount for Free Shipping	Website	If you enable Free Shipping with Minimum Order, enter the minimum order amount value in the field.
Ship to Applicable Countries	Website	Specifies which country customers are allowed to use this shipping method. All Allowed Countries: Customers from all countries specified in your store configuration can use this shipping method. Specific Countries: After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.
Show Method if Not Applicable	Website	Options include: Yes: DHL always appears as a shipping option during checkout, even if not applicable to the order. No: DHL appears as a shipping option during checkout only if applicable to the order.(i.e. Order weight exceeds the maximum weight amount.)
Debug	Website	Creates a log file with error information.
Sort Order	Website	Sets the sort order value for this shipping method. This value, relative to other shipping methods, determines the displayed order of shipping options in checkout. Shipping methods appear in ascending order, based on sort order value. Enter 0 for the top of the list.

Package Type by Carrier

The following tables list the shipping methods and supported package types for U.S. and international shipments, by carrier.

- Custom packaging has been added to each shipping method of each shipping carrier.
- Shipping methods are divided into U.S. and International. Those that are marked as “U.S.” are for US domestic shipments only. Those that are marked as "International" can be those shipped from the U.S. to other countries, from other countries to the U.S. and within countries other than the U.S. FedEx does not offer domestic shipments for countries other than the U.S. at this time. USPS offers shipments from the U.S. only for both domestic and international.
- For international shipping, available package types sometimes depend on the country of origin (U.S. or other). If a shipment originates outside of the U.S., the available package types are filtered according to the types that are acceptable. For shipments that originate in countries other than the U.S., the full list of package types available for the selected shipping carrier is provided.

FedEx (U.S.)

SHIPPING METHOD	PACKAGE TYPE
FedEx First Overnight	FedEx Envelope FedEx Pak FedEx Box FedEx Tube Your Packaging
FedEx Priority Overnight	(same as above)
FedEx Standard Overnight	(same as above)
FedEx 2Day	(same as above)
FedEx Express Saver	FedEx Envelope
	FedEx Pak
	Your Packaging
FedEx Ground FedEx Home Delivery FedEx SmartPost	Your Packaging

FedEx (International)

SHIPPING METHOD	PACKAGE TYPE
FedEx International First	FedEx Envelope FedEx Pak FedEx Box FedEx Tube Your Packaging
FedEx International Priority	FedEx Envelope FedEx Pak FedEx Box FedEx 10 kg Box FedEx 25 kg Box FedEx Tube Your Packaging
FedEx International Ground	Your Packaging
FedEx Europe First Priority	FedEx Envelope FedEx Pak FedEx 10 kg Box FedEx 25 kg Box Your Packaging

UPS (U.S.)

SHIPPING METHOD	PACKAGE TYPE
UPS Next Day Air Early AM	Small Express Box Medium Express Box Large Express Box UPS Express Tube UPS Pak UPS Letter Your Packaging
UPS 2nd Day Air	(same as above)
UPS Next Day Air	(same as above)
UPS 2nd Day Air AM	(same as above)

SHIPPING METHOD	PACKAGE TYPE
UPS 3 Day Select	Your Packaging
UPS Ground	Your Packaging

UPS (International)

SHIPPING METHOD	PACKAGE TYPE
UPS Worldwide Express	Small Express Box Medium Express Box Large Express Tube UPS Express Tube UPS 10 kg Box UPS 25 kg Box UPS Pak UPS Letter Customer Packaging
UPS Worldwide Express Plus	(same as above)
UPS Worldwide Saver	(same as above)
UPS Worldwide Expedited	(same as above)
UPS Worldwide Expedited	Small Express Box Medium Express Box Large Express Tube UPS Express Tube UPS 10 kg Box UPS 25 kg Box UPS Pak Customer Packaging

USPS (International)

SHIPPING METHOD	PACKAGE TYPE
Express Mail® International Flat Rate Envelope	Express Mail International Flat Rate Envelope
Express Mail Flat Rate Envelop Hold for Pickup	Express Mail International Flat Rate Envelope

SHIPPING METHOD	PACKAGE TYPE
Priority Mail International Large Flat Rate Box	Priority Mail International Medium Flat Rate Box
Priority Mail International Small Flat Rate Box	Priority Mail International Small Flat Rate Box
Priority Mail International Flat Rate Envelope	Priority Mail International Flat Rate Envelope
Global Express Guaranteed (GXG)	Large Package/Non-Rectangular (Regular and Medium) Variable
USPS GXG Envelopes	Large Package/Rectangular (Regular and Medium) Large Package/Non-Rectangular (Regular and Medium) Variable
Express Mail International	(same as above)
Priority Mail International	(same as above)
First-Class Mail International Package	(same as above)

DHL (International)

SHIPPING METHOD	PACKAGE TYPE
Express	Package
Express International	Letter

Notes

Chapter 60:

Shipping Labels

Magento Enterprise Edition includes a high level of integration with major shipping carriers, which gives you access to carrier shipping systems to track orders, create shipping labels, and more. Shipping labels can be created for regular shipments and products with return merchandise authorization. In addition to the information provided by the shipping carrier, the label also includes the Magento order number, number of the package, and the total quantity of packages for the Magento shipment.

Topics in this chapter:

- Shipping Label Setup
- Creating Shipping Labels
- Package Configuration

Shipping Label Workflow

Shipping labels can be produced at the time a shipment is created, or later. Shipping labels are stored in PDF format and downloaded to your computer. Depending on your browser settings, you can open the file at once and print the labels. Each shipping label appears on a separate page in the PDF file.

Create Shipping Label

When you create a shipping label, Magento prompts you for information about packaging you want to use (type, size, etc.) and which products go with which package. When you finish, Magento connects to the shipping carrier web-services, creates an order in its system, and receives the shipping and tracking number(s) for the shipment.

After the shipping label is generated, the new shipment is saved and the label can be printed. If the shipping label cannot be created due to problems with connection or any other reason, the shipment is not created.

Tracking Number

Magento receives the tracking numbers related to the shipment when labels are generated. and inserts the numbers into the Shipping and Tracking Information section. If you generate the same shipping labels multiple times, the original tracking numbers are preserved.

Returned Merchandise

The logic for tracking numbers differs when shipping labels are created for merchandise returns from RMA managing pages. In this case, old tracking numbers are replaced with new ones.

Shipping Label Setup

The following settings must be made at the product level, as well as in the configuration of each carrier. All carriers require that you open an account. It is recommended that you complete the configuration in your store for each carrier that you plan to use.

To configure shipping labels:

1. On the Admin menu, select **Catalog > Manage Products**.
2. The **Country of Manufacture** field is required for each product that is shipped internationally by USPS and FedEx, Update the field for each product record, as needed.

Country of Manufacture

3. When complete, click the **Save** button.

   If you have many products that need to be updated with the same information, do the following:

   a. In the Manage Products list, select the checkbox of each product that needs to be updated. For example, all products that are manufactured in China.

   b. Set the **Actions** control to “Update Attributes,” and click the **Submit** button.

   c. In the Update Attributes form, find the **Country of Manufacture** field and select the **Change** checkbox. Then, select the country from the list and click the **Save** button.

4. On the Admin menu, select **System > Configuration**. Then, do the following:

   a. In the panel on the left, under Sales, select **Shipping Settings**. Click to expand the **Origin** section, and verify that the following fields are complete:

Street Address	The street address of the place from which shipments are sent. For example, the location of your company or warehouse. This field is required for shipping labels.
Street Address Line 2	Any additional address information, such as the floor, entrance and so on. We strongly recommend that you use this field.

Origin

b. In the Configuration panel under Sales, select **Shipping Methods**. Click to expand the **USPS** section, and verify that the following fields are complete:

Secure Gateway URL	You do not need to configure this field, it is pre-populated by Magento.
Password	The password is provided by USPS, and gives you access to their system through Web Services.
Length, Width Height, Girth	The default dimensions of the package. To make these fields appear, set Size to "Large."

c. Click to expand the **FedEx** section, and verify that the following fields are complete:

- Meter Number
- Key
- Password

This information is provided by the carrier, and is required to gain access to their system through Web Services.

d. In the Configuration panel under General, select **Store Information**. Verify that the fields in this section are complete. If you have multiple stores, and the contact information differs from the default, set **Current Configuration Scope** to the store view and verify that the information is complete. If any of this information is missing, an error message will appear when you try to print shipping labels.

Store Name	The name of the store or store view.
Store Contact Telephone	The telephone number of the primary contact for the store or store view.
Country	The country where your store is based.
VAT Number	If applicable the Value Added Tax number of your store. (Not required for stores based in the U.S.)
Store Contact Address	The street address of the primary contact for the store or store view.

Store Information

5. When complete, click the **Save Config** button.

Carrier Requirements

CARRIER	REQUIREMENTS
USPS	Requires a USPS account.
UPS	Requires a UPS account. Shipping labels are available only for shipments that originate in the U.S. Specific credentials are required for stores outside the US.
FedEx	Requires a FedEx account. For stores outside of the U.S., shipping labels are supported for international shipments only. FedEx does not allow domestic shipments that originate outside of the U.S
DHL	Requires a DHL account. Shipping labels are supported only for shipments that originate in the U.S.

Creating Shipping Labels

You can easily create shipping labels for new and existing orders from the Admin of your store. To create shipping labels, you must first set up your shipping carrier account to support labels. Then, follow the prompts to enter a description of the package and its contents. Magento contacts the shipping carrier, creates an order in the carrier's system, and receives a shipping label and tracking number for the shipment.

An individual order is created for each package shipped. A single shipment with multiple packages receives multiple shipping labels.

Process Overview:

Step 1: Contact Your Shipping Carriers
Step 2: Update the Configuration for Each Carrier
Step 3: Create Shipping Labels
Step 4: Print Shipping Labels

Step 1: Contact Your Shipping Carriers

Before you begin, make sure that your shipping accounts are set up to process labels. Some carriers might charge an additional fee to add shipping labels to your account.

1. Contact each carrier that you use to activate shipping labels for your store.
2. Follow the instructions provided by each carrier to add shipping label support to your account.

FedEx	Contact FedEx Web Services regarding their label evaluation process.
USPS	Contact uspstechsupport@esecurecare.net to request that API Signature Confirmation V3 be enabled for your live USPS API Access account.
UPS	Contact UPS to confirm your account type supports shipping labels. To generate shipping labels, you must use the UPS XML option.
DHL	Contact the DHL Resource Center to learn more about their services or send an inquiry through their Contact Center.

Step 2: Update the Configuration for Each Carrier

1. Make sure that your Store Information is complete.
2. Follow the instructions below for each carrier account that has been activated for label printing.

UPS Configuration

United Parcel Service ships both domestically and internationally. However, shipping labels can be generated only for shipments that originate within the United States.

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Shipping Methods**.
3. Click to expand the **UPS** section. Then, verify that your UPS **Shipper Number** is correct. Your Shipper Number appears only when United Parcel Service XML is enabled.
4. When complete, click the **Save Config** button.

USPS Configuration

The United States Postal Service ships both domestically and internationally.

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Shipping Methods**.
3. Click to expand the **USPS** section. Then, do the following:
   a. Verify that the **Secure Gateway URL** is entered. The correct URL should be entered automatically.
   b. Enter the **Password** provided to you by USPS.
   c. Set **Size** to “Large.” Then, enter the following dimensions:
      - Length
      - Width
      - Height
      - Girth
4. When complete, click the **Save Config** button.

FedEx Configuration

FedEx ships domestically and internationally. Stores located outside the United States can create FedEx labels for international shipments only.

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under sales, select **Shipping Methods**.
3. Click to expand the **FedEx** section. Then, make sure that the following FedEx credentials are correct:
   - Meter Number
   - Key
   - Password
4. When complete, click the **Save Config** button.

DHL Configuration

DHL provides international shipping services.

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under sales, select **Shipping Methods**.
3. Click to expand the **DHL** section. Then, do the following:
   a. Verify that the **Gateway URL** is entered. The correct URL should be entered automatically.
   b. Make sure that the following credentials are complete:
      - Access ID
      - Password
      - Account Number
4. When complete, click the **Save Config** button.

Step 3: Create Shipping Labels

Process Overview:

Method 1: Create Label for New Shipment

Method 2: Create Label for Existing Shipment

Method 1: Create Label for New Shipment

1. On the Admin menu, select **Sales > Orders**.
2. Find the order in the list, and click to open the record. The status of the order must be either "Pending" or "Processing."
3. In the upper-right corner, click the **Ship** button. Then, confirm the shipping information according to carrier requirements.
4. In the lower-right corner, select the **Create Shipping Label** checkbox. Click the **Submit Shipment** button, and do the following:
   a. To add products from the order to the package, click the **Add Products** button. The Quantity column shows the maximum number of products that are available for the package.
   b. Select the check box of each product to be added to the package and enter the **Quantity** of each. Then, click the **Add Selected Product(s) to Package** button.
      - To add a new package, click the **Add Package** button.
      - To delete a package, click the **Delete Package** button.

   If you use a package type other than the default, or require a signature, the cost of shipping might differ from what you have charged the customer. Any difference in the cost of shipping is not reflected in your store.

5. When complete, click **OK**.
   - If you need to cancel an order, click the **Cancel** button. A shipping label will not be created, and the Create Shipping Label checkbox is cleared.
6. Magento now connects to the shipping carrier system, submits the order, and receives a shipping label and tracking number for each package.
   - If the label is successfully created, the shipment is submitted, the tracking number appears in the form, and the label is ready to print.
   - If the carrier cannot create the label due to the problems with connection, or for any other reason, the shipment is not processed.

Method 2: Create Label for Existing Shipment

1. On the Admin menu, select **Sales > Orders**.
2. Find the order in the list and click to open the Shipping form. Then, do the following:
   a. In the Shipping and Tracking Information section, click the **Create Shipping Label** button.
   b. Distribute the ordered product(s) to the appropriate package(s), and click **OK**.
   c. To review the package information, click the **Show Packages** button.

   Magento connects to the shipping carrier system, submits an order, and receives a shipping label and a tracking number.

   If a shipping label for this shipment already exists in the system, it is replaced with a new one. However, existing tracking numbers are not replaced. Any new tracking number is added to the existing one.

Step 4: Print Shipping Labels

Shipping labels are generated in PDF format, and can be printed from the Admin. Each label includes the order number and package number.

Because an individual shipment order for each package is created, multiple shipping labels might be received for a single shipment.

Process Overview:

Method 1: Print Label from Shipment Form

Method 2: Print Labels for Multiple Orders

Method 1: Print Label from Shipment Form

1. On the Admin menu, do one of the following:
   - Select **Sales > Orders**. Find the order in the list, and click to open the record. In the Order View panel on the left, select **Shipments**. Then, click to open the shipment record.
   - Select **Sales > Shipments**. Find the order in the list, and click to open the record.
2. To download the PDF file, go to the Shipping and Tracking section of the form and click the **Print Shipping Label** button. Depending on your browser settings, the shipping labels can be viewed and printed directly from the PDF file.

The Print Shipping Label button appears only after the carrier has generated labels for the shipment. If the button is missing, click the **Create Shipping Label** button. The button will appear after Magento receives the label from the carrier.

Method 2: Print Labels for Multiple Orders

1. On the Admin menu, do one of the following:
   - Select **Sales > Orders**.
   - Select **Sales > Shipments**.
2. In the list, select the checkbox of each order that has shipping labels to be printed.
3. In the upper-right corner, set the **Actions** control to "Print Shipping Labels."
4. Click the **Submit** button.

A complete set of shipping labels is printed for each shipment that is related to the selected orders.

Required Carrier Configuration Settings

SETTING	DESCRIPTION
Type	Package types differ by carrier and method. The default package type for each carrier is initially selected. USPS does not require the package type for domestic shipments.
Customs Value	(International shipments only) The declared value or sales price of the contents of an international shipment.
Total Weight	The total weight of all products added to the package is calculated automatically. The value can also be changed manually, and entered as pounds or kilograms.

SETTING	DESCRIPTION	
Length, Width, Height	(Optional) The package dimensions are used for custom packages only. You can specify the measurements units as inches or centimeters.	
	Not Required	No confirmation of delivery is sent to the store by the shipping carrier.
	No Signature	A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.
	Signature Required	The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.
	Direct	(FedEx Only) FedEx obtains a signature from someone at the delivery address. If no one is available to sign for the package, the carrier tries to deliver the package at another time.
	Indirect	(FedEx Residential Deliveries Only) FedEx obtains the signature of someone, possibly a neighbor or building manager, at the delivery address. The recipient can leave a signed FedEx door tag to authorize the package to be left without anyone present to sign for it.
	Contents	(USPS Only) Select one of the following descriptions of the package: Gift Documents Commercial Sample Returned Goods Merchandise Other
	Explanation	(USPS Only) A detailed description of the package contents.
	Adult Required	The shipping carrier obtains the signature of an adult recipient and provides the store with a printed copy.

Package Configuration

The Create Packages window appears when you choose to create a shipping label. You can start configuring the first package at once.

Create Packages

To configure a package:

1. Complete the fields as described below.

> If you select the non-default value in the Type field or choose to require a signature confirmation, the price of a shipment may differ from the one you charged to the customer.

2. To view a list of shipped products and add them to the package, click the **Add Products** button.

   The Qty column is pre-populated with the maximum available quantity to add (for the Package 1 this number is equal to the total shipped quantity of the product).

3. Specify the products and quantities. To add the products to the package, click the Add Selected Product(s) to Package button in the header of the grid. The products are added to the package.

   - To add a new package, click the **Add Package** button in the window header. You can add several packages, and edit them simultaneously.
   - To delete a package, click the **Delete Package** button.

   After products have been added to the package, the quantity cannot be edited directly.

To increase the quantity:

1. Click the **Add Selection** button.
2. Enter the additional quantity.

The number is added to the previous quantity of the product in the package.

To decrease the quantity:

1. Delete the product from the package.
2. Click the **Add Selection** button.
3. Enter the new, smaller value.

After you distribute all products, the total number of the packages you are going to use equals the number of the last package in the list. The OK button is disabled until all shipped items are distributed between packages and all necessary information is specified.

4. When complete, click the **OK** button to generate the labels.

If you need to stop the process, click the **Cancel** button. The packages are not saved, and the shipping label creation is canceled.

Field Descriptions

FIELD	DESCRIPTION
Type	Specifies the type of a package. Select one of the predefined values. Available package types are different for each shipping carrier, and also depend on the shipping method selected during order creation. To see the complete list of shipping methods and their supported packages implemented in Magento. For shipping labels created for DHL, FedEx, and UPS shipments, the “Type of Goods” field is set to “Merchandise.” When the Create Packages pop-up window opens, the default package for the shipping carrier set in system configuration is selected in the Type field. If you select a package, which is not designed by a shipping carrier, you will need to specify the dimensions of the package. This field is unavailable for USPS domestic shipments, because specifying package types is not necessary for these shipments. For USPS, the Type field reflects the value from the Contents field in the Create Packages pop-up window.
Total Weight	The total weight of a package. The field is pre-populated with the total weight of products in a package. The unit of measurement can be set to either pounds or kilograms.
Length	The length of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The unit of measurement can be set to either inches or centimeters.

FIELD	DESCRIPTION	
Width	The width of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.	
Height	The height of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.	
Signature	Confirmation Defines delivery confirmation. Options include:	
	Not Required	No delivery confirmation letter is sent to you.
	No Signature	A delivery confirmation letter without a recipient's signature is sent to you.
	Signature Required	The shipping carrier obtains the recipient's signature and provides you with its printed copy.
	Adult Required	The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.
	Direct (FedEx only)	FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.
	Indirect (FedEx only)	FedEx obtains a signature in one of three ways: (1) from someone at the delivery address; (2) from a neighbor, building manager or other person at a neighboring address; or (3) the recipient can leave a signed FedEx Door Tag authorizing release of the package without anyone present. Available for residential deliveries only. The options may vary slightly for different shipping methods. For the most up to date information refer to shipping carrier's resources.

FIELD	DESCRIPTION
Contents	(Available for USPS shipments only) Description of the package contents. Options include: Gift Documents Commercial Sample Returned Goods Merchandise Other
Explanation	(USPS shipments only) Detailed description of the package content.

Enterprise
EDITION

Taxes

Chapter 61:

Managing Taxes

Magento provides a variety of options for defining taxes that can be accessed by selecting the Sales menu and then the Tax option. Tax classes are used to define "tax rules." Tax rules are defined as a combination of a Product Class, a Customer Class and a Tax Zone and Rate, as described in this chapter.

Each type of customer can be assigned a customer class when you define them, and each product is assigned a tax class. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the shopping cart, and the region (as defined by the customer's shipping address, billing address or shipping origin).

Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union. To learn more, see the Knowledge Base article: Recommended Tax Configurations and Best Practices.

Topics in this chapter:

- General Tax Settings
- Tax Classes
- Tax Zones & Rates
- Tax Rules
- Tax Resource Permissions
- Cross-Border Price Consistency
- Fixed Product Tax (FPT)
- Compound Taxes
- Value Added Tax (VAT)

Tax Resource Permissions

Admin permissions can be set to restrict access to tax resources, based on the business "need to know." To create an Admin role with access to tax settings, select both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default shipping point of origin, you must also allow access to the System/Shipping resources for the role, because the shipping settings determine the store tax rate used for catalog prices.

General Tax Settings

Before setting up your taxes, make sure that you are familiar with the tax requirements of your locale. Then, you can complete the tax configuration as needed for your store.

The following instructions take you through the basic tax setup for your store. To learn more about tax classes, tax zones and rates, or other aspects of tax management, see the individual topics in this chapter .

Process Overview:

Step 1: Set Up Tax Classes

Step 2: Complete the Calculation Settings

Step 3: Complete the Display Settings

Step 4: Complete the Fixed Product Tax Settings

To complete the general tax configuration:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Tax**. Then, follow the steps below.
3. When complete, click the **Save Config** button.

Step 1: Set Up Tax Classes

1. Click to expand the **Tax Classes** section.

Tax Classes

2. Set **Tax Class for Shipping** to the appropriate class. The default classes are:

- Taxable Goods
- Shipping
- Tax Exempt

3. Set **Tax Class for Gift Options** to the appropriate class. The default classes are the same.

Step 2: Complete the Calculation Settings

1. Click to expand the **Calculation Settings** section. Then, do the following:

Tax Calculation Settings

a. In the **Tax Calculation Method Based On** field, select whether the tax is based on the price of each unit, or on the "row total" (that is, the total for a line item in the order, accounting for any discounts).

b. In the **Tax Calculation Based On** field, select whether the tax is calculated based on the customer's shipping address, billing address, or your store's shipping origin.

c. In the **Catalog Prices** field, specify whether the catalog prices of items include tax or exclude tax.

d. In the **Shipping Prices** field, select whether the shipping amounts include tax or exclude tax.

e. In the **Apply Customer Tax** field, select whether tax is applied to the original or discounted price.

f. In the **Apply Discount on Prices** field, select whether any discounts applied include the tax or exclude it.

g. In the **Apply Tax On** field, select whether tax is applied to custom prices or to original prices.

h. In the **Enable Cross Border Trade** field, select "Yes" to use consistent pricing across different tax rates, or select "No" to vary the price by tax rate.

> **Important!** If you enable cross-border trade your profit margin changes by tax rate. In other words, your profit is determined by the formula **(Revenue - CustomerVAT - CostOfGoodsSold)**. To enable cross-border trade you **must** set prices to display including tax.

2. Click to expand the **Default Tax Destination Calculation** section. Then, specify which country is used by Magento as the default for tax calculations.

Default Tax Calculation Settings

Step 3: Complete the Price Display Settings

1. Click to expand the **Price Display Settings** section Then, do the following:

Price Display Settings

a. Set **Display Product Prices in Catalog** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

If you set the Display Product Prices field to "Including Tax," the tax appears only if there is a tax rule that matches the tax origin, or if Magento detects that the customer address matches the tax rule. This can happen after a customer creates an account, logs in, or uses the Tax and Shipping estimation tool in the cart.

b. Set **Display Shipping Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

2. Click to expand the **Shopping Cart Display Settings** section.

For each section listed, chose how you want taxes and prices to be shown for products in a shopping cart, according to the requirements of your store and locale.

Shopping Cart Display Settings

3. Click to expand the **Orders, Invoices, Credit Memos Display Settings** section. Then, select how prices and taxes are displayed in orders, invoices, and credit memos.

Orders, Invoices, Credit Memos Display Settings

Step 4: Complete the Fixed Product Tax Settings

1. Click to expand the **Fixed Product Taxes** section.

2. Specify the behavior of fixed per product taxes, such as the European DEEE/WEEE (Waste Electrical and Electronic Equipment) tax, according to the requirements for your store and products.

Fixed Product Taxes

To assign a fixed tax to a product, create an attribute with the Catalog Input Type for Store Owner set to “Fixed Product Tax.” Then, add the attribute to the attribute set for the product.

Tax Classes

Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the shopping cart, and the region (as defined by the customer's shipping address, billing address or shipping origin).

Every product and customer is assigned a tax class. Tax classes, in turn, are used to define tax rules. Tax rules are a combination of a customer tax class, product tax class, and tax rates. The two basic types of tax classes are:

- Product Tax Classes
- Customer Tax Classes

Product Tax Classes

Create product tax classes and assign products to them by product type. For example, food might not be taxed (or might be taxed at a different rate). If your store charges an additional tax on shipping, you should designate the product tax class for shipping.

Product Tax Classes

To define a product tax class:

1. On the Admin menu, select **Sales > Tax > Product Tax Class**.
2. In the upper-right corner, click the **Add New** button.

Product Tax Class Information

3. Enter a **Class Name** for this tax class.

   You can apply a tax class to a product by editing the product and choosing the appropriate option on the Prices tab.

4. When complete, click the **Save Class** button.

Customer Tax Classes

You can create the customer tax classes you need, and then assign them to customer groups. For example, in some jurisdictions, wholesale transactions are not taxed, but retail transactions are. Members of the Wholesale Customer group can be associated with the Wholesale tax class.

Customer Tax Classes

To define a customer tax class:

1. On the Admin menu, select **Sales > Tax > Customer Tax Classes**.
2. In the upper-right corner, click the **Add New** button.

Customer Tax Class Information

3. Enter a **Class Name** for this tax class.
4. When complete, click the **Save Class** button.

To apply a tax class to a customer group:

1. On the Admin menu, select **Customers > Customer Groups**.

Customer Groups

2. Do one of the following:
   - To create a new group, click the **Add New Customer Group** button.
   - To edit an existing group, click to open the group in edit mode.
3. If creating a new group, enter a unique **Group Name** that is less than 32 characters.

4. Select the **Tax Class** that applies to the group.

Group Information

5. When complete, click the **Save Customer Group** button.

Tax Zones & Rates

Tax rates are generally applicable to transactions that take place in specific geographical areas. The Tax Zones and Rates tool enables you to specify the tax rate for each geographical area for which you collect and remit taxes. Because you give each tax zone and rate specification a unique identifier, you can have multiple tax rates for a given geographic area (for example, for places that do not tax food or medicine but tax other products).

Manage Tax Zones & Rates

To define tax zones and rates:

1. On the Admin menu, select **Sales > Tax > Manage Tax Zones & Rates**.
2. In the upper-right corner, click the **Add New Tax Rate** button.

Tax Rate Information

3. In the Tax Rate Information section, do the following:

a. In the **Tax Identifier** field, enter a unique name for this tax. Do not use spaces. This identifier is not shown in the store if the Tax Titles section is completed, as described below.

b. Select the location of the **Country** and **State**. (Starting in EE 1.13.1, you can use the wildcard character * for State.)

c. Do one of the following:

- If you want the ZIP or postal code represented as an individual code, set **Zip/Post is Range**, to "No." Then, enter the **Zip/Post Code**.
- If you want the ZIP or postal code represented as a range, set **Zip/Post is Range** to "Yes." Then, enter the **Range From** and **Range To** values.

> The wildcard character * can be used to represent all values. For example, 90* means all ZIP codes from 90000 through 90999.

d. In the **Rate Percent** field, enter the percentage of tax.

4. In the **Tax Titles** section, enter a name of this tax for each store view.

Tax Titles

5. When complete, click the **Save Rate** button.

Tax Rules

Tax management rules put all the taxation elements together: product tax classes, customer tax classes, and tax zones and rates. Each tax rule consists of a customer tax class, a product tax class, and a tax rate.

When numerous taxes must be defined, you can simplify the process by importing the tax data from a spreadsheet. Select Sales > Tax > Import/Export Tax Rates.

Manage Tax Rules

To define tax rules:

1. On the Admin menu, select **Sales > Tax > Manage Tax Rules**.
2. In the upper-right corner, click the **Add New Tax Rule** button. Then, do the following:

Tax Rule Information

a. Enter a **Name** for the rule.

b. Select a **Customer Tax Class**. To select multiple options, hold the Ctrl key down and click each item.

c. Select a **Product Tax Class**.

d. Select the **Tax Rate**.

This rule applies the tax rate to customers in the selected customer tax class and to products in the selected product tax class.

e. In the **Priority** field, enter a number to indicate the priority of this tax, when more than one tax applies. If two tax rules with the same priority apply, then the taxes are added together. If two taxes with different priority settings apply, then the taxes are compounded.

3. In the **Sort Order** field, enter a number to indicate the order in which tax rules are displayed on the Manage Tax Rules page.

4. If you want taxes to be calculated off the order subtotal, select the **Calculate off Subtotal Only** checkbox.

5. When complete, click the **Save Rule** button.

Field Descriptions

FIELD	DESCRIPTION
Name	Enter a name for this tax rule to make it easy to identify.
Customer Tax Class	Select the customer tax class associated with this rule.
Product Tax Class	Select the product tax class associated with this rule.
Tax Rate	Select the tax rate that applis to this rule.
Priority	Enter a number to indicate the priority of this tax, when more than one tax applies. Lower numbers have higher priority. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount.

FIELD	DESCRIPTION
Calculate off Subtotal Only	Select this checkbox for taxes to be calculated based on the subtotal of the order. This means that for this tax rule, tax applies only to the subtotal of the order.
Sort Order	Specify the order in which tax rules are displayed on the Manage Tax Rules page. Lower numbers have higher sort order in the list.

Fixed Product Tax

Some tax jurisdictions have a fixed tax that must be added to certain types of products. Magento lets you set up a fixed product tax (FPT) for use in your store's tax calculations. For example, in some countries FPT can be used to set up a Waste Electrical and Electronic Equipment Directive (WEEE) tax, also known as "ecological tax" or "eco tax," that is collected on certain types of electronics to offset the cost of recycling. This tax is a fixed amount, rather than a percentage of the product price.

Fixed product taxes are applicable at an item level, based on the product. In some jurisdictions this tax is subject to an additional % tax calculation. Your tax jurisdiction might also have rules about how you display the price of products to your customers, either with or without tax. Be sure you understand those rules so that you can set your FPT display options accordingly.

Quoting FTP Prices in Email

We recommend that you exercise caution when quoting FTP prices in email, because the way you set up the Display Prices in Sales Modules and Display Prices in Email options can affect customer confidence in their orders. For example, if you choose to display Order Review prices without showing FPT, customers who buy items with associated FPT will see a total that includes the FPT tax amount, but they will not see an itemized entry for the amount.

> **Important!** This might cause abandoned carts if your customers see an order total that does not match what they expect, based on an itemized list of products in the order.

FTP Display Settings

FPT	DISPLAY SETTING AND ASSOCIATED CALCULATION	
Not Taxed	Excluding FPT	Treats FPT as a separate row in the cart and includes the value of FPT in the appropriate tax calculations.
	Including FPT	FPT is added to the base price of an item but is not included in tax- rule-based calculations.
	Excluding FPT, FPT Description, Final Price	Item prices are shown without FPT, FPT amount, and with FPT included. FPT is not included in tax-rule-based calculations.
Taxed	Excluding FPT	Treats FPT as a separate row in the cart and includes the value of FPT in the appropriate tax calculations.
	Including FPT	FPT is included in the price of an item, and no change to tax calculations is required.
	Excluding FPT, FPT Description, Final Price	Item prices are shown without FPT, FPT amount, and with FPT included. FPT is included in tax-rule-based calculations.

Fixed Product Tax Setup

The following instructions show how to set up a fixed product tax for your store. An “eco tax” is an example of how you might used FPT. After setting the scope for the tax and the countries and states where the tax applies, and depending on the options you choose, the input fields can change to accommodate the local requirements.

Process Overview:

Step 1: Enable the FPT Tax

Step 2: Create an FPT Attribute

Step 3: Add the FPT to an Attribute Set

Step 4: Apply the FPT to Products

Step 1: Enable the FPT Tax

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Tax**.
3. Click to expand the **Fixed Product Taxes** section. Then, complete the fields as needed, using the Field Description section at the end of this section for reference.

Fixed Product Tax

4. When complete, click the **Save Config** button.

Step 2: Create an FPT Attribute

1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
2. In the upper-right corner, click the **Add New Attribute** button. Then, do the following:

Fixed Product Tax

a. In the **Attribute Code** field, specify a unique identifier for this attribute. Do not use spaces or special characters. However, you can use hyphens or underscores. The maximum length is 30 characters.

b. Set **Scope** to indicate where in your Magento installation the attribute will be available.

c. Set **Catalog Input Type for Store Owner** to "Fixed Product Tax."

d. Set **Apply To** to one of the following:

All Product Types	Makes the FPT attribute available for all product types.
Selected Product Types	If you select this option, select each product type in the list that will use the attribute.

3. In the panel on the left, select **Manage Label / Options**. Then, enter a label to identify the field. If you enter one label for the Admin, it will be used for the other views.

Manage Label / Options

4. When complete, click the **Save Attribute** button.

   To learn more, see: Creating Attributes.

Step 3: Add the FPT Attribute to an Attribute Set

1. On the Admin menu, select **Catalog > Attributes > Manage Attribute Sets**.
2. Open the attribute set that needs the FPT attribute.
3. Drag the FPT attribute from the list of Unassigned Attributes on the right to the Groups list. The group folders correspond to sections in the Product Information panel. You can place the attribute wherever you want it to appear.

Edit Attribute Set

4. When complete, click the **Save Attribute Set** button.

   To learn more, see: Creating Attribute Sets.

Step 4: Apply the FPT to Products

1. On the Admin menu, select **Catalog > Manage Products**.
2. Find the product that needs the FPT and open it in edit mode.

3. In the product information, find the FPT field that you added to the attribute set. Then, do the following:

Product Information with FPT Field

4. Click the **Add Tax** button. Then, do the following:

   a. Select the **Country/State** where the FPT applies.

   b. Enter the amount in the **Tax** field.

   c. To add more FPT taxes, click the **Add Tax** button and repeat the process.

FPT Tax

5. When complete, click the **Save** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable FPT	Website	Determines if FPT is available. Options include: Yes / No
Display Prices in Product Lists	Website	Controls the display of FPT in product lists. Options include: Including FPT only Including FPT and FPT description Excluding FPT, FPT description, final price Excluding FPT
Display Price On Product view Page	Website	Controls the display of FPT on the product page. Options include: Including FPT only Including FPT and FPT description Excluding FPT, FPT description, final price Excluding FPT
Display Prices in Sales Modules	Website	Controls the display of FPT in the shopping cart and during checkout. Options include: Including FPT only Including FPT and FPT description Excluding FPT, FPT description, final price Excluding FPT
Display Prices in Emails	Website	Controls the display of FPT in email. Options include: Including FPT only Including FPT and FPT description Excluding FPT, FPT description, final price Excluding FPT
Apply Discounts to FPT	Website	Determines if discounts can be applied to the FPT amount. Options include: Yes / No
FPT Tax Configuration	Website	(Available in EE 1.13.1 and later) Determines how FPT tax is calculated. Options include:

FIELD	SCOPE	DESCRIPTION	
		Not Taxed	Select this option if your taxing jurisdiction does not tax FPT. (For example,California.)
		Taxed	Select this option if your taxing jurisdiction does tax FPT. (For example, Canada.)
		Loaded and Displayed with Tax	Click this option if FPT is added to the order total before applying tax. (For example, EU countries.)
Include FPT in Subtotal	Website	Determines if FPT is included in the shopping cart subtotal. Options include:	
		Yes	Includes FPT in the shopping cart subtotal.
		No	FPT is not included in the subtotal, and is placed after the subtotal in the shopping cart.

Compound Taxes

For compound taxes, the total cost of a product or service is taxed at one rate, and then the total of that amount, including the first tax amount, is taxed a second time. Compound tax is also known as stacked tax.

Compound taxes use different tax rule priorities. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount. Lower numbers have higher priority.

Important! In order for compound taxes to work correctly do not select the Calculate off subtotal only check box when you set up your tax rules that apply to compound taxes. This check box overrides the compounding calculation and cannot be used in conjunction with compound taxes.

Example 1: Regular Two-Tax Calcuation

For example, in a regular tax calculation involving two tax rules, each rule is applied separately to the product subtotal, and the taxes are added together to calculate the total tax, which is then added to the product subtotal to calculate the grand total:

Regular Two-Tax Calculation

$50.00	Product Price
+ $50.00	Product Price
$100.00	Subtotal
$5.00	Subtotal x 1st tax rate 5%
+ $10.00	Subtotal x 2nd tax rate 20%
$15.00	Total Taxes
$100.00	Subtotal
+ $15.00	Total Taxes
$115.00	Grand Total

Example 2: Compound Tax Calculation

With compound taxes, the first tax is added to the product subtotal, and the second tax is applied to that total:

Compound Tax Calculation

$50.00	Product Price
+ $50.00	Product Price
$100.00	Subtotal
$5.00	Subtotal x 1st tax rate 5%
+ $10.50	[Subtotal + (Subtotal x 1st rate)] x 2nd tax rate: $105 x 10%
$15.50	Total Taxes
$100.00	Subtotal
+ $15.50	Total Taxes
$115.50	Grand Total

To set up compound taxes:

1. Set up all the tax rates that will be used in your compound tax rule. See: Tax Zones & Rates.
2. Set up the first tax rule for compounding. For the first tax rule, be sure that you set a higher priority than you will set for the next tax rule, which will be compounded on top of this first tax rule. Lower numbers are used for higher priority. Use 0 for the highest priority. See: Tax Rules.
3. Set up the second tax rule for compounding. For the second rule, be sure that you set a lower priority (use a higher number) than you set for the first tax rule.

Cross-Border Price Consistency

Cross-border trade (also referred to as price consistency) supports European Union (EU) and other merchants who want to maintain consistent prices for customers whose tax rates are different than the store tax rate.

Merchants operating across regions and geographies can show their customers a single price by including the tax in the price of the product. Pricing is clean and uncluttered regardless of tax structures and rates that vary from country to country.

> **Important!** When cross-border trade is enabled, your profit margin changes by tax rate. Profit is determined by the formula: (Revenue - CustomerVAT - CostOfGoodsSold).

To enable cross-border price consistency:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Tax**.
3. Click to expand the **Calculation Settings** section. Then, do the following:

Enable Cross Border Trade Settings

   a. Set **Catalog Prices** to “Including Tax.”
   b. To enable cross-border price consistency, set **Enable Cross Border Trade** to “Yes.”
4. When complete, click the **Save Config** button.

Notes

Chapter 62:

Value Added Tax (VAT)

Some countries charge a value added tax, or VAT, on goods and services. There can be different VAT rates depending on which stage you as a merchant are at in the manufacture or distribution of the products, materials, or services that you sell to your customers. In this case you may need to use more than one VAT rate in your store for tax calculation purposes.

Topics in this chapter:

- Value Added Tax Setup
- VAT Validation

Value Added Tax Setup

The following instructions include a sample procedure to set up a 20% VAT in the U.K. for sales to retail customers. For other tax rates and countries, follow the general procedure but enter specific information that corresponds to your country, VAT rate, customer types, and so on.

> Before proceeding, make sure to find out which rules and regulations apply to VAT in your area.

In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. To learn more, see: VAT Validation.

Process Overview:

Step 1: Set Up Customer Tax Classes
Step 2: Set Up Product Tax Classes
Step 3: Set Up Tax Zones and Rates
Step 4: Set Up Tax Rules
Step 5: Apply Tax Classes to Products

Step 1: Set Up Customer Tax Classes

1. On the Admin menu, select **Sales > Tax > Customer Tax Classes**.
2. Ensure that there is a customer tax class that is appropriate to use with the VAT. For this example, ensure that there is a customer tax class named Retail Customer. If Retail Customer does not exist, click the **Add New** button and add it.

Step 2: Set Up Product Tax Classes

1. On the Admin menu, select **Sales > Tax > Product Tax Classes**.
2. Click the **Add New** button and create three new classes:
   - VAT Standard
   - VAT Reduced
   - VAT Zero
3. Click the **Save Class** button for each new class that you add.

Step 3: Set Up Tax Zones and Rates

1. On the Admin menu, select **Sales > Tax > Manage Tax Zones & Rates**.

   For this example you can remove the U.S. tax rates, or leave them as they are.

2. Click the **Add New Tax Rate** button. Add new rates as follows:

NEW TAX RATE	SETTINGS	
VAT Standard	Tax Identifier:	VAT Standard
	Country and State:	United Kingdom
	Rate Percent:	20.00
VAT Reduced	Tax Identifier:	VAT Reduced
	Country and State:	United Kingdom
	Rate Percent:	5.00

3. Click the **Save Rate** button for each rate.

Step 4: Set Up Tax Rules

A tax rule is a combination of a customer tax class, a product tax class, and a tax rate.

1. On the Admin menu, select **Sales > Tax > Manage Tax Rules**.
2. Add new tax rules as follows:

NEW TAX RULE	SETTINGS	
VAT Standard	Name:	VAT Standard
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Standard
	Tax Rate:	VAT Standard Rate
VAT Reduced	Name:	VAT Reduced
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Reduced
	Tax Rate:	VAT Reduced Rate

3. Click the **Save Rule** button for each rate.

Step 5: Apply Tax Classes to Products

1. On the Admin menu, select **Catalog > Manage Products**.
2. Open a product from your catalog in edit mode.
3. On the General page, find the **Tax Class** field. Then, select the **VAT Class** that applies to the product.
4. When complete, click the **Save** button.

VAT ID Validation

VAT ID Validation automatically calculates the required tax for B2B transactions that take place within the European Union (EU), based on the merchant and customer locale. Magento performs VAT ID validation using the web services of the European Commission server.

> VAT-related tax rules do not influence other tax rules, and do not prevent the application of other tax rules. Only one tax rule can be applied at a given time.

- VAT is charged if the merchant and customer are located in the same EU country.
- VAT is not charged if the merchant and customer are located in different EU countries, and both parties are EU-registered business entities.

The store administrator creates more than one default customer group that can be automatically assigned to the customer during account creation, address creation or update, and checkout. The result is that different tax rules are used for intra-country (domestic) and intra-EU sales.

> **Important:** If you sell virtual or downloadable products, which by their nature do not require shipping, the VAT rate of a customer's location country should be used for both intra-union and domestic sales. You must create additional individual tax rules for product tax classes that correspond to the virtual products.

Customer Registration Workflow

If VAT ID Validation is enabled, after registration each customer is proposed to enter the VAT ID number. However only those who are registered VAT customers are expected to fill this field.

After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address or changes the whole default address. The group can be temporarily changed (group change will be emulated) in some cases during one-page checkout.

If enabled, you can override VAT ID Validation for individual customers by selecting the checkbox on the Customer Information page.

Checkout Workflow

If a customer's VAT validation is performed during checkout, the VAT request identifier and VAT request date are saved in the Comments History section of the order.

The system behavior concerned with the VAT ID validation and the customer group change during the checkout depends on how the Validate on Each Transaction and the Disable Automatic Group Change settings are configured. This section describes the implementation of the VAT ID Validation functionality for the checkout on the frontend.

In case a customer uses Google Express Checkout, PayPal Express Checkout or another external checkout method, when the checkout is performed completely on the side of the external payment gateway, the Validate on Each Transaction setting cannot be applied. Thus the customer group cannot change during checkout.

Customer initiates one-page checkout
Enter new address (includes guest checkout, registration during checkout, or no address)
New
Address
Existing
Use previously saved and validated address
Yes
Validate
Validate on each transaction?
No
VAT ID is validated, and customer group assignment is emulated
Validate and Assign
Use Previous Results
Previous validation results are used, if available
Address available before checkout?
Address
Yes (all other situations)
No
Automatic group change?
Change
No
Use Previous Group
Customer group assigned before checkout is used.
Yes
An emulated customer group is permanently assigned to customer.
Group Assigned
Yes
Customer completes checkout

Example: Minimal Tax Rules Required for VAT ID Validation

TAX RULE #1	
Customer Tax Class	• A class for domestic customers • A class for customers with invalid VAT ID • A class for customers, for whom VAT ID validation failed
Product Tax Class	A class for products of all types, except downloadable and virtual.
Tax Rate	VAT rate of the merchant's country.

TAX RULE #2	
Customer Tax Class	A class for intra-union customers.
Product Tax Class	A class for products of all types, except downloadable and virtual.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

TAX RULE #3	
(Required only if you sell downloadable or virtual products.)	
Customer Tax Class	• A class for domestic customers • A class for customers with invalid VAT ID • A class for customers, for whom VAT ID validation failed
Product Tax Class	A class for downloadable and virtual products.
Tax Rate	VAT rate of the merchant's country.

TAX RULE #4	
(Required only if you sell downloadable or virtual products.)	
Customer Tax Class	A class for intra-union customers.
Product Tax Class	A class for downloadable and virtual products.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

Setting Up VAT ID Validation

Process Overview:

Step 1: Create the VAT-Related Customer Groups
Step 2: Create the VAT-Related Classes, Rates and Rules
Step 3: Enable and Configure VAT ID Validation
Step 4: Set your VAT ID and Location Country
Step 5: Verify the List of EU Member Countries

Step 1: Create the VAT-Related Customer Groups

VAT ID Validation automatically assigns customers to one of the following default customer groups, according to VAT ID validation results:

- Domestic
- Intra-EU
- Invalid VAT ID
- Validation error

You can create new customer groups to be used with VAT ID Validation, or use existing groups if they comply with your business logic. When configuring VAT ID Validation, you must assign each of the created customer groups as a default for customers with appropriate VAT ID validation results.

Step 2: Create the VAT-Related Classes, Rates, and Rules

Magento uses tax rules to apply the appropriate value-added tax. Each tax rule is defined by the following:

- Customer Tax Classes
- Product Tax Classes
- Tax Rates

To use the VAT ID Validation effectively, you must create the appropriate tax rules, based on customer and product tax classes, and tax rate.

Step 3: Enable and Configure VAT ID Validation

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Customer Configuration**.
3. Set **Current Configuration Scope** to “Default Config,” or the applicable store view.
4. Click to expand the **Create New Account Options** section.

5. Set **Enable Automatic Assignment to Customer Group** to "Yes." Then complete the fields as described below.

6. When complete, click the **Save Config** button.

Create New Account Options

Step 4: Set Your VAT ID and Location Country

1. On the Admin menu, select **System > Configuration**.

2. In the panel on the left, under General, select **General**.

3. Set **Current Configuration Scope** to the applicable store view.

4. Click to expand the **Store Information** section. Then, do the following:

Store Information

a. Select your **Country**.

b. Enter your **VAT Number**. Then, click the **Validate VAT Number** button. The result appears immediately.

If your VAT number is valid, then in addition to the validation result for each customer, the validation server sends to Magento the VAT request identifier and VAT request date. If a customer's VAT validation is performed during checkout, the VAT request identifier and VAT request date are saved in the Comments History section of the Order.

5. When complete, click the **Save Config** button.

Step 5: Verify the List of EU Member Countries

1. On the Admin menu, select **System > Configuration**.
2. Set **Current Configuration Scope** to the applicable store view.
3. Click to expand the **Countries Options** section.

Countries Options

4. In the **European Union Countries** list, verify that each member country of the EU is selected.
5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable Automatic Assignment to Customer Group	Store View	Determines if customers are automatically assigned to the default customer group. To show VAT number in the store, set Show VAT Number in the storefront, select "Yes." Options include: Yes — The system does not automatically validate customer VAT IDs nor does it change customer groups. No — The system behavior is as usual, and the default customer group can be set in the Default Group field.
Tax Calculation Based On	Store View	Determines if the VAT calculation is based on the customer's shipping or billing address. If the customer does not have a shipping address (that is, the customer has only now registered and the system does not yet take into account the customer's shipping address), the Default Tax Destination Calculation address is used for tax calculations that appear to the customer. Options include: Billing Address — Calculates VAT based on the customer billing address. Shipping Address — Calculates VAT based on the customer shipping address. **Important!** If the tax calculation is based on the shipping address, and a customer purchases only downloadable or virtual products, Magento uses the billing address for the VAT calculation.
Default Group	Store View	Identifies the default customer group.
Group for Valid VAT ID - Domestic	Store View	Determines the customer group that is automatically assigned to customers from your country who have a valid VAT ID.

FIELD	SCOPE	DESCRIPTION
Group for Valid VAT ID - Intra-Union	Store View	Determines the customer group that is automatically assigned to customers from other EU countries who have a valid VAT ID.
Group for Invalid VAT ID	Store View	Determines the customer group that is automatically assigned to customers who have an invalid VAT ID.
Validation Error Group	Store View	Determines the customer group that is automatically assigned to customers who failed VAT ID validation.
Validate on Each Transaction	Store View	Choose whether VAT ID validation will be performed each time during order creation even if a previously saved customer address with validated VAT ID is used. The option applies to one-page checkout in the storefront, only. If a new customer address is used (including guest checkout or if a customer has no address assigned to their account), then the validation is performed irrespective of this setting. During order creation in the Admin, no automatic validations are performed. Options include: Yes / No
Default Value for Disable Automatic Group Changes Based on VAT ID	Global	(Available only if Current Configuration Scope is set to “Default Group.”) Choose whether the automatic change of customer group based on VAT ID will be enabled or disabled by default. The setting can be overridden on the product level. The setting influences the system behavior in the following situations: • The VAT ID of the customer’s default address or the whole default address changes. • Customer group change was emulated during the checkout for a registered customer who had no previously saved address or for a customer, who registered during the checkout. If the automatic group change is enabled, then in the first case the customer group changes automatically, and in the second case the temporarily emulated customer group is assigned to customer.

FIELD	SCOPE	DESCRIPTION
		If the automatic group change is disabled, the customer group that is assigned never changes, unless an administrator changes it manually.
Show VAT Number on Frontend	Website	Determines if the VAT number is visible to customers in the store. Options include: Yes / No
Default Email Domain	Store View	Identifies the default email domain.
Default Welcome Email	Store View	Identifies the email template used for the default Welcome email.
Email Sender	Store View	Identifies the store identity that appears as the sender of the Welcome email.
Require Emails Confirmation	Website	Determines if email messages require confirmation. Options include: Yes / No
Confirmation Link Email	Store View	Identifies the email template used for the confirmation email.
Welcome Email	Store View	Identifies the template used for the Welcome email that is sent after the account is confirmed.
Generate Human-Friendly Customer ID	Global	Choose whether the field for entering and storing the VAT ID number will be visible in the frontend. Options include: Yes / No

Managing VAT ID Validation

A customer group, which should be assigned to a customer according to the validation results, can differ from the customer group that is currently assigned to the customer. The system displays suggested groups that the administrator can confirm or reject the current order. If the administrator confirms, the group change is emulated for the current order and the corresponding VAT rate is applied (if the corresponding tax rule is configured in the system). The actual customer group of a customer is not changed.

If a new customer account is added when an order is created, and an administrator confirms the customer group that corresponds to the VAT ID validation results, after the order is created, the customer account is saved in the system, and the customer group that was used to create the order is assigned to the customer.

Customer Address Workflow

When an administrator adds a new default address with a VAT ID to the account of a new

or existing customer, or changes the VAT ID of the existing default address, the system validates the VAT ID and assigns the appropriate customer group to the customer. The validation is performed after the Save or Save and Continue button is clicked.

Order Creation Workflow

When an order is created from the Admin, VAT ID validation is not performed automatically. To validate the VAT ID of the customer address, an administrator must click the Validate VAT Number button in the Billing Address or Shipping Address section of the Create New Order page. After the validation, the administrator receives a pop-up notification of the validation results.

Validating Customer VAT ID at Order Creation

Automatic Customer Group Changes

When VAT ID Validation is enabled, the group that a customer is assigned to must be changed manually from the Admin. The system automatically and permanently changes a customer group in the following situations:

- The VAT ID of the customer's default address or the whole default address changes.
- The customer group change was emulated during the checkout for a registered customer who had no previously saved address, or for a customer who registered during checkout.

To disable automatic group change for a customer:

1. On the Admin menu, select **Customers > Manage Customers**.
2. Open the customer record in edit mode.
3. Just below the Group field, select the **Disable Automatic Group Change Based on VAT ID** checkbox.

> **Important!** The setting does not influence the emulation of the customer group change during checkout.

To set the default automatic group change behavior:

The configuration setting is made on the global level, and applies to new customers and those whose records are available in the system when VAT ID Validation is enabled for the first time.

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Customer Configuration**.
3. Click to expand the **Create New Account Options** section.
4. Set **Default Value for Disable Automatic Group Changes Based on VAT ID** as needed.
5. When complete, click the **Save Config** button.

Disabling Automatic Group Change on Customer Level

VAT ID Customer Address Attribute

The customer VAT ID value is stored in the `vat_id` customer address attribute. The default label of this attribute is VAT number. The VAT number field is always present in all shipping and billing customer addresses when viewed from the Admin, but it not mandatory. The field can be configured to appear in the storefront by setting the the Show VAT Number in Frontend field in the Create New Account Options section of Customer Configuration.

Show VAT Number

For customers not from EU countries, consider storing the VAT number (if any), in the existing Tax/VAT Number customer attribute to avoid any possibility of customer group change (whether persistent or emulation during checkout). It is recommended that you rename the Tax/VAT Number customer attribute to avoid confusion with the new VAT Number customer address attribute that is used for the VAT ID Validation functionality.

Enterprise
EDITION

Store Operations

Chapter 63:

Managing Email Templates

Email templates define the layout, content, and formatting of automated messages sent from your store. They are called **transactional emails**[1] because each one is associated with a specific type of transaction, or event.

Magento includes a set of responsive email templates that are triggered by a variety of events that take place during the operation of your store. Each template is optimized for any screen size, and can be viewed from the desktop, as well as on tablets and smartphones. You will find a variety of prepared email templates related to customer activities, sales, product alerts, admin actions, and system messages that you can customize to reflect your brand.

Topics in this chapter:

- Supported Email Clients
- Template Layout and Styles
- Preparing Your Email Logo
- Magento Upgrades
- Transactional Email Configuration
- Email Template Setup
- Customizing Email Templates
- Email Template Reference

[1] An automated email message that is sent in response to a specific event or transaction.

Supported Email Clients

A wide range of technologies is supported by the various email clients and services available today. Although they do not all follow the same standards, and there is some variation in the way email messages are rendered, we have found the following services to be compatible with Magento Enterprise Edition.

Desktop Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
OS X 10.8	Apple Mail 6
OS X 10.7	Outlook 2011 Outlook 2013
Windows 8	Outlook 2010
Windows 7	Outlook 2007 Outlook 2003

Mobile Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
Android 4.2, “Jelly Bean”	Native email app
Android 2.3, “Gingerbread”	Native email app
Gmail App (Android 4.2)	Native email app
Blackberry 5 OS	Native email app
IOS 8	iPhone 6 iPhone 6 Plus
IOS 7	iPad (Retina) iPad Mini iPhone 5s
	Mail on these devices:
IOS 6	iPhone 5 iPhone 4s

Web Clients

EMAIL APPLICATION	BROWSERS SUPPORTED*
AOL Mail	Chrome Internet Explorer Firefox
Gmail	Chrome Internet Explorer Firefox
Yahoo! Mail	Chrome Internet Explorer Firefox
Outlook.com	Chrome Internet Explorer
	* The latest version of each browser was used for testing.

Template Layout and Styles

Magento Enterprise Edition has a set of responsive templates that define the header, body, and footer of all automated email messages that are sent from your store. The content, or body section, is combined with the header and footer to create each message. You can set up the header and footer one time, and then use them for every message.

Inline and Non-Inline Styles

Email templates are written in HTML, and are associated with the locale. The CSS files that provide the formatting instructions are stored separately, and reside on the server.

Many email clients do not support CSS formatting instructions that are stored separately from the email message. For this reason, the `non_inline_styles` variable has been added to the header of each message, to convert the external CSS styles to local, inline styles. The variable points to the CSS file on the server that provides the styles that are needed to format the template. The styles are then converted to inline styles, and copied to the <styles> tag of each message.

When you examine the header template code, you will find the markup tag with the `non_inline_styles` variable just after the `<body>` tag.

```
<body>

{{var non_inline_styles}}

<!-- Begin wrapper table -->
```

When customizing transactional email templates from the Admin, you can enter any additional CSS styles that you need directly into the Template Styles box. They will be included when the `non_inline_styles` are converted.

Preparing Your Email Logo

To ensure that your logo renders well on high-resolution devices, the uploaded image should be at least twice the size of the dimensions that are specified in the header template. Be careful to preserve the **aspect ratio**[1] of the logo, so the height and width resize proportionally.

Logo with Transparent Background

Supported File Formats

Logos can be saved as any of the following file types. Logos with transparent backgrounds can be saved as either .gif or .png files.

- jpg / jpeg
- gif
- png

Image Size

To make the most of the limited vertical space in the header, the logo should be cropped to eliminate any wasted space above or below the image. As a general rule, you can make an image smaller than the original, but not larger without losing resolution. If possible, the original artwork should be at least as large as the uploaded file. Taking a small image and doubling its size in a photo editor does not improve the resolution.

For example, in the default header template, the display dimensions of the logo are 168 pixels wide by 48 pixels high. To increase the resolution of the image, the image that is uploaded must be at least twice the size.

LOGO DIMENSIONS	1 X (DISPLAY SIZE)	2 X (IMAGE SIZE)	2.5 X (IMAGE SIZE)
Width:	168 px	336 px	420 px
Height:	48 px	96 px	120 px

[1]The proportional relationship between the width and height of an image.

If the original artwork was created as a vector, rather than a bitmap, it can be scaled up or down to the dimensions needed without losing resolution. The image can then be saved in one of the supported bitmap image formats. If the original logo artwork is a bitmap, the original should be at least twice the display size.

Magento Upgrades

If you have upgraded from an earlier version of Magento Enterprise Edition, you can use an email client to view each transactional email template that is generated by your store. Verify that the logo, fonts, and styles render correctly.

Email templates that were created with earlier versions of Magento will not have the `non_inline_styles` variable, and will not be responsive. However, most can be used as they are.

To take advantage of the high-resolution display that is available on many devices, email logos are now uploaded at twice their display size. If you intend to use the responsive email templates, you should upload a higher resolution logo.

> It is not necessary to reconfigure your email logo for use with custom templates that were created with earlier versions of Magento.

Transactional Email Configuration

The configuration for transactional email templates is designed to support multiple devices. The email logo that is uploaded is designed to render well on high-resolution displays. The configuration specifies the header and footer templates that are used for all transactional email messages sent within the scope of the configuration. To support the requirements of many email clients, a variable has been added that is used to convert external CSS styles to inline styles. The name of the external CSS file that it references is specified in the configuration.

Transactional Emails

To configure transactional email templates:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **Design**.
3. If needed, set **Current Configuration Scope** in the upper-left corner to the website, store, or store view where the configuration applies.
4. Click to expand the **Transactional Emails** section. Then, do the following:

Step 1: Upload Your Logo

1. To upload your prepared **Logo Image**, click the **Browse** button. Find the file on your computer, and click to copy the path to the field.
2. In the **Logo Image Alt** field, enter the alternate text to identify the image.

   If you uploaded a logo image, enter the **Logo Width** and **Logo Height** in pixels. Enter each value as a number, without the “px” abbreviation. These values refer to the display dimensions of the logo in the header, and not to the actual size of the image.

Step 2: Select the Header and Footer Templates

If you have custom header and footer templates for your store, or for different stores, you can specify which templates should be used for each, according to the scope of the configuration.

1. Select the **Email Header Template** to be used for all transactional email messages.
2. Select the Email Footer Template to be used for all transactional email messages.

Step 3: Identify the CSS File(s)

In the **Non-inline CSS File(s)** field, enter the name of each CSS file that is needed to format

the content of your transactional email messages. Separate the names of mutiple files with a comma. On the server, the CSS files reside in the following location:

```
[magento install dir]/skin/frontend/[package]/[theme]/css/
```

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Logo Image	Store View	Identifies the logo file that appears in the header of transactional email messages. To support high-resolution displays, upload an image that is twice the size that is needed. For example, if the actual display dimensions of the logo are 100 pixels high and 200 pixels wide, you should upload an image that is 200 pixels high and 400 pixels wide. To delete the current image and upload another, select the Delete Image checkbox. Then, browse to select the new image. Allowed file types: .jpg / .jpeg .gif .png
Logo Image Alt	Store View	Enter alternative text that appears if the logo image is not available.
Logo Width	Store View	Enter the display width of the image in pixels, as a number. Do not include the “px” abbreviation. It is important to specify both width and height to preserve the aspect ratio when the image is rendered at different sizes.
Logo Height	Store View	Enter the display height of the image in pixels, as a number. Do not include the “px” abbreviation. It is important to specify both width and height to preserve the aspect ratio when the image is rendered at different sizes.
Email Header Template	Store View	Select the template to be used for the header of all transactional email messages.

FIELD	SCOPE	DESCRIPTION
Email Footer Template	Store View	Select the template to be used for the footer of all transactional email messages.

Non-inline CSS File(s)	Store View	Because many mail clients do not support separate CSS files, Magento uses the non_inline_styles variable to convert CSS styles to inline style declarations that reside in the <style> tag of the template.
		The markup tag is enclosed in double braces, and includes a variable that contains the name of the external CSS file.
		`{{var non_inline_styles}}`
		The location of the CSS file on the server is relative to the following path:
		`skin/frontend/[package]/[theme]/css/`

Email Template Setup

After creating a customized version of a template, remember to update your system configuration so the correct template is used for each message. You can access the template configuration from the System Configuration menu, or by clicking the link at the top of the template when open in edit mode.

Sales Email Configuration

Method 1: Link to Configuration

This method is convenient to use when you finish customizing a template. With the template open in edit mode, simply click the link at the top of the Template Information section to jump to the configuration settings for the template.

Link to Template Configuration Settings

Method 2: Navigate to the Configuration

This is a convenient method when you have many customized templates that need to be added to the configuration.

To configure sales email templates:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Sales, select **Sales Emails**. Then, select the appropriate templates for each of the following sections:
   - Order and Order Comments
   - Invoice and Invoice Comments
   - Shipment and Shipment Comments
   - Credit Memo and Credit Memo Comments
   - RMA and RMA Authorization
   - RMA Admin Comments and RMA Customer Comments

Order Email Configuration

3. When complete, click the **Save Config** button.

To configure customer email templates:

1. On the Admin menu, select **System > Configuration.**
2. In the panel on the left, under Customer, select **Customer Configuration**. Then, select the appropriate templates for each of the following sections:
   - Create New Account Options
   - Password Options
   - Store Credit Options

Store Credit Options

3. When complete, click the **Save Config** button.

Customizing Email Templates

Magento includes a default email template for the body section of each message that is sent by the system. Each template with the body content is combined with the header and footer templates to create the complete message. The content is formatted with HTML and CSS, and can be easily edited, and customized by adding variables and widgets.

The default templates already include your logo and store information and can be used as they are, without further customization. As a best practice, you should view each default email template and verify any changes you make before sending them to customers.

When a custom template is ready to be used, make sure to update your system configuration, so the custom template will be used instead of the default template. Email templates can be customized for each website, store, or store view. For detailed instructions, see the following topics:

- Header Template
- Footer Template
- Content Templates

Header Template

The default header includes your email logo that is linked to your store. You can easily insert variables to add store contact information to the header. To make more extensive changes requires a working knowledge of both HTML and CSS. On the server, the header template is located at:

```
[Magento install dir]/app/locale/en_US/template/email/html/header
```

Step 1: Load the Template

1. On the Admin menu, select **System > Transactional Emails**.
2. Click the **Add New Template** button. Then, do the following:
   a. Set **Template** to "Email - Header."
   b. Set **Locale** to the language of the email recipients.
3. Click the **Load Template** button.

Choosing the Email - Header Template

Step 2: Customize the Template

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

1. In the **Template Name** field, enter a name for your custom header.
2. In the **Template Content** box, modify the HTML as needed.

Template Information

3. To insert a variable, position the cursor in the code where you want the variable to appear, and click the **Insert Variable** button. Then, do the following:

   a. In the list of Store Contact Information variables, click the variable that you want to insert.

   You are not limited to the variables in this list, although they are the ones most often included in the header. You can actually type the code for any system variable directly into the template.

   b. Click the **Preview Template** button. Then, make any adjustments to the template that are needed.

Insert Variable

4. When complete, click the **Save Template** button.

   Your custom header now appears in the list of Transactional Email templates.

Custom Header Template

Step 3: Update the Configuration

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **Design**.
3. If necessary, set the **Current Configuration Scope** to the website, store, or store view where the header will be used.
4. Click to expand the **Transactional Emails** section, and do the following:
   a. If the header is for a specific view, clear the **Use Website** checkbox that is next to the Email Header Template field.
   b. Set **Email Header Template** to the name of the custom header that you just created.

Configuring a Custom Header for a Specific View

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	DESCRIPTION
Load default template	
Template	Lists the selection of available templates, and identifies the template to be customized.
Locale	Identifies the locale where the template is to be used.
Template Information	
Template Name	The name of your custom template.
Template Subject	(N/A) This field isn't used for header templates.
Template Content	The content of the template, in HTML.
Template Styles	(N/A) This field is not used for header templates.

Store Contact Information Variables

VARIABLE	MARKUP TAG
Base Unsecure URL	`{{config path="web/unsecure/base_url"}}`
Base Secure URL	`{{config path="web/secure/base_url"}}`
General Contact Name	`{{config path="trans_email/ident_general/name"}}`
General Contact Email	`{{config path="trans_email/ident_general/email"}}`
Sales Representative Contact Name	`{{config path="trans_email/ident_sales/name"}}`
Sales Representative Contact Email	`{{config path="trans_email/ident_sales/email"}}`
Custom1 Contact Name	`{{config path="trans_email/ident_custom1/name"}}`
Custom1 Contact Email	`{{config path="trans_email/ident_custom1/email"}}`
Custom2 Contact Name	`{{config path="trans_email/ident_custom2/name"}}`
Custom2 Contact Email	`{{config path="trans_email/ident_custom2/email"}}`
Store Name	`{{config path="general/store_information/name"}}`

VARIABLE	MARKUP TAG
Store Contact Telephone	`{{config path="general/store_information/phone"}}`
Store Contact Address	`{{config path="general/store_information/address"}}`

Footer Template

The footer contains the closing and signature line of the email message. You can change the closing to fit your style, and add additional information, such as the company name and address below your name. More extensive changes requires a working knowledge of both HTML and CSS. On the server, you will find the footer template in the following location:

```
[Magento install dir]/app/locale/en_US/template/email/html/header.html
```

Step 1: Load the Template

1. On the Admin menu, select **System > Transactional Emails**.
2. Click the **Add New Template** button. Then, do the following:
   a. Set **Template** to "Email - Footer."
   b. Set **Locale** to the language of the email recipients.
3. Click the **Load Template** button.

Choosing the Email - Footer Template

Step 2: Customize the Template

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

1. In the **Template Name** field, enter a name for your custom footer.
2. In the **Template Content** box, modify the HTML as needed.

Footer Template Information

3. To insert a variable, position the cursor in the code where you want the variable to appear, and click the **Insert Variable** button. Then, do the following:
   a. In the list of Store Contact Information variables, click the variable that you want to insert.
   b. When you're done, click the **Preview Template** button to verity the code. Then, make any adjustments to the template that are needed.

Insert Variable

4. When the template is finalized, click the **Save Template** button.

   Your custom footer now appears in the list of Transactional Email templates.

Custom Footer Template

Step 3: Update the Configuration

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **Design**.
3. If necessary, set the **Current Configuration Scope** to the website, store, or store view where the header will be used.
4. Click to expand the **Transactional Emails** section, and do the following:
   a. If the header is for a specific view, clear the **Use Website** checkbox that is next to the Email Footer Template field.
   b. Set **Email Footer Template** to the name of the custom header that you just created.
5. When complete, click the **Save Config** button.

Message Templates

The process of customizing the main body of each message is the same as the customizing the header or footer. The only difference is that there are many templates, listed in alphabetical order. You can use the templates as they are, or customize the most important messages first, such as messages related to customer accounts, and customer activities. For a complete list, see the Email Template Reference at the end of this section.

Step 1: Choose a Default Template

1. On the Admin menu, select **System > Transactional Emails**.
2. Click the **Add New Template** button.
3. In the **Template** list, select a default template from the list of predefined templates.

Load Default Template

4. If necessary, set the **Locale** to the store language.

5. Click the **Load Template** button.

   The path to the configuration settings for each default template appears at the top of the Template Information section. You can click this link later when you are ready to update the configuration with the name of the new template.

Template Information

Step 2: Customize the Content

1. In the Template Information section, do the following:

   a. Enter a **Template Name** for the new email template.

   b. In the **Template Subject** field, type the text that you want to appear in the Subject line of the message.

   c. For a better view of the content and variables in the message, click the **Convert to Plain Text** button. When prompted to confirm, click **OK**.

   d. To restore the HTML, click the **Return HTML Version** button.

   e. Edit the **Template Content** as needed.

2. (Optional) To insert a variable, do the following:

   a. Position the cursor in the text where you want the variable to appear.

   b. Click the **Insert Variable** button.

The list includes the standard Store Contact Information variables, and an additional list of variables that are specific to the template.

c. In the list of available variables, click the variable you want to insert into the template.

When a variable is selected, the markup tag that is associated with the variable is inserted at the cursor position in the code.

Insert Variable

3. When complete, click the **Save Template** button.

4. Make sure to **Preview** the template code, and verify that the template is customer-ready.

Step 3: Update Your Configuration

Before the template can be used, the configuration must be updated with the name of the new template. Do one of the following:

- Click the link at the top of the Template Information section to jump to the configuration settings for the template.
- On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Sales Emails**.

Email Templates

Customer Account

- New Account
- New Account Confirmation Key
- New Account Confirmed
- Forgot Password
- Remind Password

Customer Activity

- Contact Form
- Customer Invitation
- Send Product to a Friend
- Share Wishlist
- Gift Card Account Sent from Edit Page
- Gift Card Accounts Generated from Gift Card
- Gift Registry Owner Notification
- Gift Registry Sharing
- Gift Registry Update
- Reward Points Balance Update
- Reward Points Expiry Warning

Newsletters

- Newsletter Subscription Confirmation
- Newsletter Subscription Success
- Newsletter Unsubscription Success

Admin Activity

- Forgot Admin Password
- Currency Update Warnings
- Import Failed / Export Failed
- Email - Footer
- Email - Header
- Rule Reminder

System Notifications

- Log Cleanup Warnings
- File History Clean Failed
- Token Status Change
- Sitemap Generate Warnings

Product Alerts

- Product Alerts Cron Error
- Product Price Alert
- Product Stock Alert

Order Fulfillment

- New Order
- New Order for Guest
- Order Update
- Order Update for Guest
- Payment Failed
- New Invoice
- New Invoice for Guest
- Invoice Update
- Invoice Update for Guest
- New Shipment
- New Shipment for Guest
- Shipment Update
- Shipment Update for Guest
- New Credit Memo
- New Credit Memo for Guest
- Credit Memo Update
- Credit Memo Update for Guest
- Store Credit Update
- New RMA
- New RMA for Guest
- RMA Admin Comments
- RMA Admin Comments for Guest
- RMA Authorization
- RMA Authorization for Guest
- RMA Customer Comments

Chapter 64:

Managing Data Transfer

The Import/Export tool gives you the ability to manage multiple customer and product records in a single operation. If you have a large catalog of products, you will find it much easier to export the data, edit the data in a spreadsheet, and then import the data back into your store.

The CSV file format separates each data element by a comma, and is used as the standard for data exchange operations. All spreadsheet and database applications support the CSV file format. If you are working with a Mac, you should save the data in the CSV (Windows) format.

Topics in this chapter:

- Working with CSV Files
- Importing Data
- Exporting Data
- Scheduled Import / Export

Working with CSV Files

Data that is imported from a CSV file into Magento, must have a specific structure. Each column heading must exactly match the Attribute Code for the attribute represented by the column. Magento supports the import and export of product and customer data in CSV format.

To ensure that the column headings of the CSV file can be read by Magento, first export the data to a CSV file. You can then edit the file (by adding or updating rows) and re-import it.

Product CSV Structure

The imported or exported catalog products CSV file contains information about products and relations between them. The table has the following structure:

Exported Product CSV in Excel

Product Column Names

COLUMN NAME	DESCRIPTION
`_<name>`	The names of the service columns and complex data columns. Service columns contain entity properties, which are not attributes. For example, columns with website or product type information are service columns. The underscore as first character is used to distinguish these columns from the attribute column names.
`<attribute name>`	The names of the columns with values of both system-created attributes and attributes created by the store administrator.

Customer CSV Structure

The imported or exported customers CSV file contains the table with information about customers. The table has the following structure:

Exported Customer CSV in Excel

The first row of the table contains the names of the attribute columns (which are the same as attribute codes). There are two types of column names, as shown in the following table. Other rows contain attribute values, service data, and complex data. Each row with non-empty values in the `email` and `_website` columns starts the description of the subsequent customer. Each row can represent customer data with or without address data, or the address data only. In case a row contains only the address data, values in the columns, related to the customer profile, will be ignored and may be empty.

To add or replace more than one address for a customer, in the import file add a row for each new address with empty customer data and the new or updated address data below the customer data row.

Exported Customer CSV in Notepad

Customer Column Names

COLUMN NAME	DESCRIPTION
`_<name>`	The names of the service columns, and complex data columns. Service columns contain entity properties, which are not attributes. For example, columns with website or store information are service columns. The underscore as first character is used to distinguish these columns from the other attributes names. The `_address_default_billing` and the `_address_default_shipping` columns are the default billing and shipping addresses flags. If the address in the row is the default billing and/or shipping address of the client, the `_address_default_billing` and/or `_address_default_shipping` columns in this row will have a value of "1."
`<attribute name>`	The names of the columns with values of both system-created attributes, and attributes created by the store administrator.

Import

Importing is available for all product types, except bundle, gift card, and downloadable products. You can import customer data, product data, and product images.

File Validation

During the file validation process, all attribute values are checked for conformance with the required data type (decimal, integer, varchar, text, datetime). Complex data, service data, and attributes with values from a defined set (such as a drop-down or multiple select), are checked to ensure their values exist in the defined sets.

For new entities, the presence of the required attribute values is checked. For existing entities, the presence of required attributes values is not checked, but if a required value is specified, it is validated by the attribute type.

To import customer or product data:

1. On the Admin menu, select **System > Import/Export > Import**. Then, do the following:

Import Settings

a. Set **Entity Type** to one of the following:

- Products
- Customers

b. Set **Import Behavior** to the way you want complex data to be managed if imported records already exist in the database.

- Complex data for products includes categories, websites, custom options, tier prices, related products, up-sells, cross-sells, and associated products data.
- Complex data for customers includes addresses.

c. Choose one of the following options:

Append Complex Data	The new complex data will be added to the existing complex data for the existing entries in the database.
Replace Existing Complex Data	The existing complex data for the existing entities will be replaced.
Delete Entities	If entities that are imported already exist in the database, they will be deleted from the database.

d. At the **Select File to Import** field, click the **Choose File** button. Then, select the CSV file that you have prepared for import.

2. Click the **Check Data** button in the upper-right corner of the page. The system validates the file. If the file is valid, the corresponding message and the Import button appear. If some of the rows in the imported file are not valid and cannot be imported, the corresponding information is included to the message, but you can proceed with importing. The invalid rows will be skipped.

3. If needed, make corrections to the CSV file.

4. Click the **Import** button to import the data into the database.

Importing Product Images

Multiple product images of each type can be imported into Magento, and associated with the correct product. Before importing products to your store, review the steps and run through the process with a few products. After you understand how it works, you'll feel confident to import large quantities of images.

To import product images:

1. Place the image files that you need to import in the subfolders in the %path_to_your Magento_instance%/media/import folder. Subfolders for the files should be created according to the following logic: Name the first folder using the first symbol of the file name, and then create a subfolder and name it using the second symbol of the file name.

   For example: for importing filename.jpg the path to the file will be the following:

   ```
   %path_to_your_Magento_instance%/media/import/f/i/filename.jpg
   ```

2. Set the **0777** permissions for the folders, and at least **0666** permissions for the image files.
3. In the import CSV file, specify the relative path to the image file (For example, /f/i/filename.jpg). The following columns correspond to product images:
   - image
   - small_image
   - media_image
4. Perform the import in the same manner as you would import product data.

   Important! Do not use upper-case characters in the file names of images to be imported.

Import Guidelines

New Entities

- The entities are added with the attribute values specified in the CSV file.
- If there is no value, or there is a non-valid value, for a required attribute with no default value set, then the entity (the corresponding row or rows) cannot be imported.
- If there is no value, or there is a non-valid value, for a required attribute with the default value set, then the entity (the corresponding row or rows) is imported, and the default value is set for the attribute.
- If the complex data is not valid, then the entity (the corresponding row or rows) cannot be imported.

Existing Entities

- For attributes that are not complex data, the values from the import file, including the empty values for the non-required attributes, replace the existing values.
- If there is no value, or there is a non-valid value, for a required attribute, then the existing value is not replaced.
- If the complex data for the entity is invalid, the entity (the corresponding row or rows) cannot be imported, except the case, when Delete Entities was selected in the Import Behavior drop-down menu.

Complex Data

- For both new and existing entities, if an attribute, specified in the import file, exists in the system, and its values are taken from the defined set of values, but the value, specified in the import file does not exist in the defined set, the row is imported and the default value, if it is defined, is set for this attribute. Otherwise the corresponding row cannot be imported.
- If an attribute name is specified in the import file but has not been defined in the system, it is not created in the system, and its values are not imported.

Invalid Files

- A file cannot be imported if all rows are invalid.
- A non-existing service data or complex data name is specified in the import file (that is, there is a column with a "_<non-existing name>" heading).

Export

The best way to become familiar with the structure of your database is to export the data and open it in a spreadsheet. Once you become familiar with the process, you'll find that it is an efficient way to manage large amounts of information.

All product types except gift cards can be exported.

To export customer or product data:

1. On the Admin menu, select **System > Import/Export > Export**.
2. In the Export Settings section, specify the following:
   a. Set **Entity Type** to one of the following:
      - Customers
      - Products
   b. Accept the default **Export File Format** of "CSV."

Export Settings

3. In the Entity Attributes section, you can include or exclude data to be exported according to the entity attribute values.
   - To include records with specific attribute values, set the required values of the attributes in the **Filter** column.
   - To omit an attribute from the export, select the **Skip** checkbox at the beginning of the row.

Export Customers Based on Attribute Value

4. Scroll down and click the **Continue** button in the lower-right corner of the page. Look for the download prompt in the lower-right corner of your browser.

The CSV file that is generated can be edited and imported back into your store. Or, it can be used for mailing or other application.

Scheduled Import/Export

Scheduled imports and exports can be run on a daily, weekly or monthly basis. The files to be imported or exported can be located on local Magento servers, or on remote FTP servers. Scheduled Import/Export is implemented by default, and does not require additional configuration. All scheduled imports and exports are managed by the Cron job scheduler.

To access the scheduled import/export:

1. On the Admin menu, select **System > Import/Export > Scheduled Import/Export**.

Scheduled Import/Export

2. To create a new scheduled import or export job, click the **Add Scheduled Import** or **Add Scheduled Export** button. After saving the record, a new scheduled import or export is added to the list on the Scheduled Import/Export page.

3. After each scheduled import and export operation, a copy of the import or export file is placed in the var/log/import_export/%Y%/%m%/%d%/ directory on the Magento local server.

   The details of each import/export operation are not written to a log, but if an error occurs, you will receive an Import or Export Failed email, which contains the error description.

   After each import job, a reindex operation is performed automatically.

Scheduled Import

The Scheduled Import process is similar to the manual Import process, with respect to the available import file format and types of import entities:

- The import file should be in .CSV format
- You can import product and customer data

The advantage of using Scheduled Import is that you can import a data file multiple times automatically, after specifying the import parameters, and schedule only once.

The details of each import operation are not written to a log, but in case of failure you will receive an Import Failed email, with a description of the error. The result of the last scheduled import job is shown in the Last Outcome column on the Scheduled Import/Export page.

After each import operation, a copy of the import file is placed in the var/log/import_export/%Y%/%m%/%d%/ directory on the server where Magento is deployed. The timestamp, the marker of the imported entity (products or customers), and the type of the operation (in this case, import) are added to the import file name.

After each scheduled import job, a reindex operation is performed automatically. On the frontend, changes in the descriptions and other text information are reflected after the updated data goes to the database, and the changes in prices are reflected only after the reindex operation.

To create a scheduled import:

1. On the Admin menu select **System > Import/Export**.
2. In the upper-right corner, click the **Add Scheduled Import** button.
3. Complete the **Import Settings**, using the field descriptions for reference.

Import Settings

4. Complete the **Import File Information** section using the field descriptions for reference.

Import File Information

5. Complete the **Import Failed Emails** section, using the field descriptions for reference.

Import Failed Emails

To set General Contact, Sales Representative, and other email addresses, see: Store Email Addresses.

6. When complete, click the **Save** button.

The new scheduled import job is added to the list on the Scheduled Import/Export page. From this page it can be run immediately for testing and edited. The import file is validated before the execution of each import job.

Field Descriptions

FIELD	DESCRIPTION
Import Settings	
Name	The name of the import. Helps you to distinguish it if many different scheduled imports are created.
Description	(Optional) You can enter an additional description.
Entity Type	Defines the data to be imported. Options include: Products / Customers.
Import Behavior	Defines how complex data will be handled if entities, which are being imported, already exist in the database. Complex data for products include categories, websites, custom options, tier prices, related products, up-sells, cross-sells, and associated products data. Complex data for customers include addresses. The following variants of handling the complex data are available: Append Complex Data — The new complex data will be added to the existing complex data for the already existing entries in the database. This is the default value. Replace Existing Complex Data — The existing complex data for the already-existing entities will be replaced. Delete Entities — If entities which are being imported already exist in the database, they will be deleted from the database.
Start Time	Set the start hour, minutes, and seconds of the import.
Frequency	Define how often the import will be run. Options include: Daily/Weekly/Monthly.
On Error	Define the system behavior in case errors are found during

FIELD	DESCRIPTION
	file validation. Options include: Stop Import — The file is not imported if any errors are found during validation. This is the default value. Continue Processing — In case errors are found during validation, but importing is possible, the file is imported.
Status	The import is enabled by default. You can suspend it by setting the Status to Disabled.
Import File Information	
Server Type	You can import from a file located on the same server where Magento is deployed (select Local Server) or from the remote FTP server (select Remote FTP). If you select Remote FTP, additional options for credentials and file transfer settings appear.
File Directory	Specify the directory where the import file is located. If Server Type is set to Local Server, specify the path relative to the Magento installation directory. For example, var/import.
File Name	Specify the name of the import file.
FTP Host[:Port]	(Appears if Server Type is set to Remote FTP) Specify the FTP host domain name or IP address of the FTP server where the import file directory is located.
User Name	(Appears if Server Type is set to Remote FTP) Specify the user name for accessing the remote FTP server.
Password	(Appears if Server Type is set to Remote FTP) Specify the password for accessing the remote FTP server.
File Mode	(Appears if Server Type is set to Remote FTP) Defines the file mode, in which the file will be transferred from the remote FTP. Select Binary or ASCII.
Passive Mode	(Appears if Server Type is set to Remote FTP) Defines whether the file will be transferred from the remote FTP in passive mode. Options include: Yes/No.
Import Failed Emails	
Failed Email Receiver	Specify the email address to which an email notification (failed

FIELD	DESCRIPTION
	import email) is sent if the import fails.
Failed Email Sender	Specify the email address that is used as the sender for the import failed email.
Failed Email Template	Select a template for the import failed email. By default, only the Import Failed (Default Template from Locale option is available. Custom templates can be created under System > Transactional Emails.
Send Failed Email Copy To	The email address to which a copy of import failed email is sent.
Send Failed Email Copy Method	Select the copy sending method for the import failed email.

Scheduled Export

Scheduled Export is similar to manual Export, with respect to the available export file format and types of entities that can be exported:

- You can export to .CSV format
- You can export product and customer data

The advantage of using Scheduled Export is that you can export data multiple times automatically, after specifying the export parameters, and schedule only once

Add Scheduled Export

The details of each export are not written to a log, but in case of failure you will receive an Export Failed email, which contains the error description.

The result of the last export job appears in the Last Outcome column on the Scheduled Import/Export page.

After each export, the export file is placed in the user-defined location, and a copy of the file is placed in the var/log/import_export/%Y/%m/%d/ directory on the server where Magento is deployed. The timestamp and the marker of the exported entity (products or customers) and type of the operation (in this case, export) are added to the export file name.

To create a scheduled export:

1. On the Admin menu, select **System > Import/Export > Scheduled Import/Export**.
2. In the upper-right corner, click the **Add Scheduled Export** button.
3. Complete the **Export Settings** section, using these field descriptions for reference.

Export Settings

4. Complete the **Export File Information** section, using these field descriptions for reference.

Export File Information

5. Complete the **Export Failed Emails** section, using these field descriptions for reference.

Export Failed Emails

6. In the Entity Attribute field set there a list of all available attributes for the selected entity. Here you can include or exclude data to be exported according to the entity attribute values. The following export restrictions can be set:
   a. You can filter the data to be exported by attributes values. To include the records with certain attribute values, set the required values of the attributes in the Filter column.
   b. To exclude products or customers with certain attribute values, you need to set the values of the attributes for which the entities will be excluded, and select the corresponding check boxes in the Skip column.
7. When complete, click the **Save** button.

   The new scheduled export job is added to the list on the Scheduled Import/Export page. From this page it can be run immediately, for testing, and edited.

Field Descriptions

FIELD	DESCRIPTION
Export Settings	
Name	The name of the export. Helps you to distinguish it if many different scheduled exports are created.
Description	(Optional) A description of the scheduled export.
Entity Type	Identifies the data to be exported. After the selection is made, the Entity Attributes appear below. Options include: Products /Customers.
File Format	Select the format of the export file. Currently only the .CSV option is available.
Start Time	Set the start hour, minutes, and seconds of the export.
Frequency	Define how often the export job will be executed. Options include:Daily/Weekly/Monthly.
Status	A new scheduled export is enabled by default. You can suspend it by setting Status to Disabled. Options include: Enabled/Disabled.
Export Settings Information	
Server Type	Determines the location of the export file. Options include: Local Server — Places the export file on the same server where Magento is deployed. Remote FTP — Places the export file on a remote server. Additional options for credentials and file transfer settings appear.
File Directory	Specify the directory where the export file is placed. In case Server Type is set to Local Server, specify the relative to Magento installation path. For example, var/export.
FTP Host[:Port]	(Visible if Server Type is set to Remote FTP) Specify the FTP host domain name or IP address of the FTP server where the export file directory is located.
User Name	(Visible if Server Type is set to Remote FTP) Specify the user name for accessing the remote FTP server.

FIELD	DESCRIPTION
Password	(Visible if Server Type is set to Remote FTP) Specify the password for accessing the remote FTP server.
File Mode	(Visible if Server Type is set to Remote FTP) Defines the file mode in which the file will be transferred to the remote FTP. Select Binary or ASCII.
Passive Mode	(Visible if Server Type is set to Remote FTP) Defines whether the file will be transferred to the remote FTP in passive mode. Options include: Yes/No.
Export Failed Emails	
Failed Email Receiver	Specify the email address to which an email notification (export failed email) is sent if the export fails.
Failed Email Sender	Specify the email address that is used as export failed email sender.
Failed Email Template	Select a template for the failed export email. By default, only the Export Failed (Default Template from Locale) option is available.
Send Failed Email Copy To	The email address to which a copy of the failed export email is sent.
Send Failed Email Copy Method	Specify the copy sending method for the export failed email.

Managing Scheduled Jobs

You can view and manage all existing scheduled imports/exports on the Scheduled Import/Export page. All existing scheduled import/export jobs appear in the list. The Last Outcome column shows the result of the last job. If the import or export has not been run yet, it has the value “Pending.”

After each scheduled import and export operation copies of import and export files are placed in the var/log/import_export/%Y/%m/%d/ directory. If History Cleaning is enabled, the older files are automatically deleted.

To access scheduled imports/exports:

1. On the Admin menu, select **System > Import/Export > Scheduled Import/Export**.
2. To run the scheduled import/export immediately, in the Action column, click **Run**.
3. To edit the scheduled import/export, in the Action column, click **Edit**, or click the import/export job in list.

4. To delete scheduled imports/exports, do the following:
   a. Select the checkbox of each scheduled import/export job to be deleted.
   b. Set the **Actions** control to "Delete."
   c. Click the **Submit** button.
   d. When prompted to conform, click **OK**.
5. To change status of scheduled imports/exports:
   a. Select the checkbox of each record to be changed.
   b. Set the **Actions** control to "Change Status." Then, set the **Status** control to the setting you want to apply to the selected records.
   c. Click the **Submit** button to update the records.

To configure file history cleaning:

1. On the Admin menu, select System > Configuration.
2. Because this task takes place on a global level, make sure **Current Configuration Scope** in the upper-right corner is set to "Default Config."
3. In the Configuration panel on the left, under Advanced, select **System**.
4. Click to expand the **Scheduled Import/Export File History Cleaning** section.

Scheduled Import/Export File History Cleaning

5. Complete the fields in this section, using the following field descriptions for reference.
6. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Save Files, Days	Global	Specify for how long import/export history files are stored.
Enable File History	Global	Select Yes if you want to activate the automatic

FIELD	SCOPE	DESCRIPTION
Cleaning		deletion of old import/exports files. By default, it is set to No.
Start Time	Global	Specify the time when the files deletion starts.
Frequency	Global	Specify how often the cron checks if there are history files that should be deleted. Options include: Daily/Weekly/Monthly.
Error Email Recipient	Global	Specify the email address to which the error email is sent if the file cleaning process fails.
Error Email Sender	Global	Select the email address from which the error email is sent.
Error Email Template	Global	Select the template for the error email. By default, only the File History Cleaning Failed (Default Template from Locale) option is available.

Chapter 65:

Reports

Magento Enterprise Edition provides a wide selection of reports to keep you current on everything from the contents of your customers' shopping carts to the tags they use. Report data can be viewed online or downloaded as a CSV or XML data file. The main types of reports are Sales, Invitations, Products, Customers, Tags, Reviews, and Search Terms.

Topics in this chapter:

- Dashboard
- Running Reports
- Refreshing Report Statistics
- Available Reports

Dashboard

The dashboard is usually the first page that appears when you log in to the Admin, and gives an overview of sales and customer activity.

The blocks on the left provide a snapshot of lifetime sales, average order amount, the last five orders, and search terms. The graph depicts the orders and amounts for the selected date range. You can use the tabs above the graph to toggle between the two views.

Topics in this section include:

- Snapshot Reports
- Dashboard Setup

Dashboard

Snapshot Reports

The tabs at the bottom of the Dashboard provide quick reports about your best-selling and most viewed products, new customers and those who have purchased the most.

Bestsellers

Lists your best-selling products, showing the price and quantity ordered.

Most Viewed Products

Lists the most recently viewed products and the number of times viewed.

New Customers

Lists recently registered customers.

Customers

Lists the customers who have ordered the most during the specified range of time.

Dashboard Setup

By default, the dashboard is the startup page for the Admin. However, if you prefer, you can change the configuration to display a different page when you log in. You can also set the starting dates used in dashboard reports, and disable the display of the charts section.

To set the date range:

Set **Select Range** to one of the following:

- Last 24 Hours
- Last 7 Days
- Current Month
- YTD
- 2YTD

To set the starting dates:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Reports**.
3. Click to expand the **Dashboard** section, do the following:

a. Set **Year-To-Date Starts** to the month and year that the current year began.

b. Set **Current Month Starts** to the current month.

Dashboard

To change the Admin startup page:

1. On the Admin menu, select **System > Configuration**. Then in the Configuration panel on the left, under Advanced, select **Admin**.
2. In the Admin UI section, set **Startup Page** to the page you want to first appear when you log in to the Admin.
3. Click the **Save Config** button to save the setting.

Startup Page

To turn off real-time data:

If you have a lot of data to process, the performance of the Dashboard can be improved by turning off the display of real time data.

1. On the Admin menu, select **System > Configuration**. Then in the Configuration panel on the left, under Sales, select **Sales**.
2. Click to expand the **Dashboard** section. Then, set **Use Aggregated Data (beta)** to "Yes."

To disable charts:

1. On the Admin menu, select **System > Configuration**. Then in the Configuration panel on the left, under Advanced, select **Admin**.

Turn Off Dashboard Charts

2. In the Dashboard section, set **Enable Charts** to "No."
3. When complete, click the **Save Config** button.

   A message on the Dashboard indicates that the chart is now disabled.

Running Reports

Magento provides a variety of reports that you can access at any time. To see the reports that you can generate in Magento, from the Reports menu, select a type of report and then select a specific report of that type. Some report pages have filter controls that enable you to narrow the scope of the report.

When you are finished making filter selections, click Show Report (or Refresh, for some reports) to generate the report.

Reports

Orders Report

The Orders report includes real-time data, and can include orders of any status during a specific period of time.

To run the Orders report:

1. On the Admin menu, select **Reports > Sales > Orders**. Then, do the following:

   a. A message indicates the last time the report statistics were refreshed. If necessary, click the link to refresh the statistics.

   b. Set **Show Report for** to the website, store, or store view that you want to include in the report.

   c. Set **Match Period To** to one of the following:

      - Order Created Date
      - Order Updated Date

   d. To determine how the report data is aggregated by row, set **Period** to one of the following:

      - Day
      - Month
      - Year

e. To include activity during a specfic period, click the calendar icon and select the **From** and **To** dates.

f. Do one of the following:

- To include all orders, set **Order Status** to "Any."
- To include only orders with a specific status, set **Order Status** to "Specified." Then, select each order status that you want to include in the report.

g. To omit any empty rows from the report, set **Empty Rows** to "No."

h. To show actual, rather than projected values, set **Show Actual Values** to "Yes."

2. When ready to run the report, click the **Show Report** button.

Orders Report by Month

To export report data:

1. Set the **Export to** control to one of the following:

- CSV
- Excel XML

2. Click the **Export** button. Then, look for the download file in the lower-left corner of your browser window.

Field Descriptions

FILTER CONTROL	DESCRIPTION
Show Report For	Determines the store view or website(s) to be included in the report.
Match Period To	Enables you to select which records to report on, based on either the order creation date or the order modified date.
Period	Enables you to aggregate the report data into rows for each day, month, or year within your report From and To dates.
From and To	Determines the start and end dates covered by the report.
Order Status	For Order Status, select Any to include all orders, or select Specified to select one or more order status values from a list.
Empty Rows	Enables you to select whether to include date period rows that have no data.
Show Actual Values	Enables you to select whether to display actual (Yes) or projected (No) values. Projected values are based on estimates of amounts to be paid.

Refreshing Report Statistics

To reduce performance impact when generating sales reports, Magento calculates and stores the statistics that are needed for each report. When you generate a report, the report uses the stored statistics, rather than recalculate the statistics for each report.

To include the most recent data, the sales report statistics must be refreshed manually before the report is generated.

Report Statistics

To refresh sales report statistics:

1. On the Admin menu, select **Reports > Refresh Statistics**.
2. In the list, select the checkbox of each report that needs to be refreshed.
3. Set the **Actions** control to one of the following:
   - Refresh Lifetime Statistics
   - Refresh Statistics for the Last Day
4. When complete, click the **Submit** button.

Available Reports

REPORT	DESCRIPTION
Total Ordered	Reports > Sales > Orders Shows orders for the specified time period.
Order Taxes	Reports > Sales > Tax Shows taxes charged for orders in the specified time period; grouped by tax rate.
Total Invoiced vs. Paid	Reports > Sales > Invoiced Shows amounts paid and unpaid for invoiced orders in the specified time period.

REPORT	DESCRIPTION
Total Shipped	Reports > Sales > Shipping Shows orders shipped in the specified time period, grouped by carrier/method; includes shipping charge amounts.
Total Refunded	Reports > Sales > Refunds Shows refunds applied to orders in the specified time period.
Coupons Usage	Reports > Sales > Coupons Shows coupons used for orders in the specified time period, grouped by coupon code.
PayPal Settlement	Reports > Sales > PayPal Settlement Reports Shows PayPal settlements for the specified time period. Click Fetch Updates to retrieve data from PayPal.
Products in Carts	Reports > Shopping Cart > Products in carts Shows products that are currently in shopping carts.
Abandoned Carts	Reports > Shopping Cart > Abandoned Carts Shows shopping carts that were started but then abandoned. Enables you to contact customers to offer incentives to turn an abandoned cart into a conversion.
Products Bestsellers	Reports > Products > Bestsellers Shows the products that were sold in the highest quantity in the specified time period.
Products Ordered	Reports > Products > Products Ordered Shows all products that were ordered in the specified time period.
Most Viewed	Reports > Products > Most Viewed Shows the products that were viewed the most times in the specified time period.
Low Stock	Reports > Products > Low Stock Shows the products whose stock levels are low.
Downloads	Reports > Products > Downloads Shows the number of purchases and downloads for each downloadable product.
New Accounts	Reports > Customers > New Accounts Shows the new accounts that were created during the

REPORT	DESCRIPTION
Customers by Orders Total	Reports > Customers > Customers by orders total Shows the customers listed in descending order of total order amount.
Customers by Number of Orders	Reports > Customers > Customers by number of orders Shows the customers listed in descending order of number of orders placed.
Customers Reviews	Reports > Reviews > Customers Reviews Shows the customers listed in descending order of number of reviews contributed.
Products Reviews	Reports > Reviews > Products Reviews Shows the products listed in descending order of number of reviews.
Customers Tags	Reports > Tags > Customers Shows the customers listed with the number of tags each one has created.
Products Tags	Reports > Tags > Products Shows the number of unique tags and total number of tags created for each product.
Popular Tags	Reports > Tags > Popular Shows the number of times each tag has been applied.
Search Terms	Reports > Search Terms Shows terms submitted with the search tool.If Hits are high, but the Results are low, you should review product names and descriptions so you can promote products related to the term.

Chapter 66:

Admin Permissions

Magento uses roles and permissions to create different levels of access to the Admin. When your store is first set up, you receive a set of login credentials for the Administrator role, with full permissions. However, you can restrict the level of permissions on a “need to know” basis for other people who work on your site. For example, a designer can be given access to only the Design tools, but not to areas with customer and order information.

In addition, you can further restrict Admin access to only a specific site, or set of sites and their associated data. If you have multiple brands or business units with separate stores on the same Magento installation, you can provide Admin access to each of your business units but hide and protect their data from other Admin users.

If an Admin user’s access is restricted to a specific set of websites and/or stores, the websites and stores for which they are not authorized will either not appear or be grayed-out as inactive. Only the sales and other data for allowed websites and stores is shown.

Topics in this chapter:

- New Users
- Custom Roles
- REST Roles
- Unlocking Accounts

Creating New Users

When your store is first installed, your login credentials have with full administrative access. As a best practice, one of the first things you should do is to create another user account with full Administrator permissions. That way, you can use one account for your everyday Administrative activities, and reserve the other as a "Super Admin" account in case you forget your regular credentials or they somehow become otherwise unusable.

If there are others on your team, or service providers who need access, you can create a separate user account for each, and assign a restricted role. To limit the websites or stores that admin users can access when they log in, you must first create a role with limited scope and resources. Then, you can assign the role to a specific user account. Admin users assigned to a restricted role can see and change data only for websites or stores that are associated with the role. They cannot change any global settings or data.

Step 1: Create a New User

1. On the Admin menu, select **System > Permissions > Users**.
2. Click the **Add New User** button.
3. In the Account Information section, do the following:

Account Information

a. Enter the **User Name** for account.

   The User Name should be easy to remember. It is not case-sensitive. For example, if your user name is "John," you can also log in as "john."

b. Complete the following information:

   - First Name
   - Last Name
   - Email address

     This email address must be different from the one that is associated with your original Admin account.

c. Assign a **Password** to the account.

The password should be seven or more characters long, and include both letters and numbers.

d. In the **Password Confirmation** box, repeat the password to make sure it was entered correctly.

4. Set **This Account is** to "Active."

Step 2: Define the Role

1. In the User Information panel on the left, click **User Role**. Then, in the list of Roles, select **Administrators**. (Initially, it will be the only role available.)

Add New User Role

2. When complete, click the **Save User** button.

   You now have two accounts with Administrator access.

Creating Custom Roles

To give someone restricted access, the first step is to create a role with the appropriate level of permissions. After the role is created, you will add the new user, set up the login credentials, and assign the role to the user account. After the role is established, you can create new Administrator users at any time, and assign the restricted role to grant the user limited access to the following resources:

- Price Resources
- Promotion Resources
- Product Resources

Add New Role

Step 1: Define the Role

1. On the Admin menu, select **System > Permissions > Roles**. Then in the upper-left corner, click the **Add New Role** button.
2. In the Role Information section, enter a descriptive **Role Name**.

Role Name

3. In the panel on the left, select **Role Resources**.
4. In the Role Scope section, set **Role Scopes** to "Custom." Then, select the checkbox of each website and view to which you want to grant permission.

Role Scopes

5. In the Roles Resources section, select the checkbox of each Admin **Resource** that you want to grant those with the role permission to access.

> **Important!** Be sure to disable access to the Permissions tool if you are limiting access for a given role. Otherwise, users with this role will be able to modify their own restrictions.

Role Resources, Collapsed View

6. (Optional) In the panel on the left, select **Role Users**. Then, assign additional Administrator user accounts to the new role.

7. When complete, click the **Save Role** button. The role now appears in the list.

Step 2: Add the New User

1. On the Admin menu, select **System > Permissions > Users**.

2. Click the **Add New User** button.

3. In the Account Information section, do the following:

Account Information

   a. Assign a **User Name** to the account.

   The User Name should be easy to remember. It is not case-sensitive. For example, if your user name is “john,” you can also log in as “John.”

b. Complete the following information:

- First Name
- Last Name
- Email address

c. Assign a **Password** to the account.

The password should be at least seven characters long, and include letters and numbers.

d. In the **Password Confirmation** field, type the password again to make sure it was entered correctly.

e. Set **This Account is** to "Active."

4. In the User Information panel on the left, click **User Role**. Then, in the list of Roles, select the option for the role you want to assign to the new user.

New User Role

5. When complete, click the **Save User** button.

Price Resources

Product Status Permissions

PERMISSION	RESTRICTIONS
Read	When Read permission is granted for the product status, the Admin user cannot change the value of the Status product attribute. When creating a new product, the Status field is unavailable for editing and is set to Disabled.
Edit	When the Edit permission is given for the product status, the Admin user can change the values of the Status product attribute.

Price Permissions

PERMISSION	RESTRICTIONS
Read	When the Read permission is given for the price, the Admin user can view, but cannot edit, the product price-related fields. When creating a new product, the Price attribute (or Amount, in case of a gift card product) is unavailable for editing and set to the default value, and creating recurring profiles is unavailable. When adding custom options, or associated products for a configurable product, or links for downloadable products, the prices are unavailable for editing and are set to zero, the Price Type field is unavailable for editing and set to Fixed.
Edit	When Edit permission is given for the product price, the Admin user has full access to all price-related fields. When access to product management is granted, but neither Read nor Edit permissions for product price are specified, all price-related fields and columns are hidden, and management of recurring profiles is unavailable. The Admin user can still create new products and add custom options, associated products, and links for downloadable products. In this case, the price fields and price columns in the grids are hidden and are set to the default or zero value. The price and total columns are hidden on the Manage Products page, the Category Products tab of the Category view, and the customer's shopping cart view in the Admin Panel.

Promotion Resources

For promotions management resources, you can grant read/edit access rights to the following resources:

- Catalog Price Rules
- Shopping Cart Price Rules
- Automated Email Reminder Rules

Read and Edit permissions for Catalog Price Rules, Shopping Cart Price Rules, and Automated Email Reminder Rules are set up and applied in the same way. When only Read permission is granted for a resource (such as for catalog price rules or shopping cart rules), the Admin user can view only the existing rules. No fields can be edited, and all management buttons are hidden When Edit permission is granted for a given resource, the Admin user has complete access to the resource.

To grant Read permission only;

1. Follow the instructions to create a custom role.
2. In the Roles Resources section, select the **Resource** checkbox, and clear the **Edit** checkbox.

Promotional Rule Permissions

PERMISSION	RESTRICTIONS
Read	The user can view the existing rules, but all fields are unavailable for editing and the management buttons are hidden. For example, on the Price Rules page, the Apply Rule and Add New Rule buttons are hidden; on the Edit Rule page, only the Back button is available.
Edit	The user has the complete access to the subsection, including all fields and buttons.

Product Resources

For product management, you can grant the following access rights:

- Product Status Permissions
- Product Price Permissions
- Access Without Permissions

When an Admin user with Read Product Price permissions creates a new product, the product price is set to the default value.

To set the default price:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Catalog, select **Catalog**.
2. In the upper-right corner, make sure that **Current Configuration Scope** is set to "Default Config."
3. Click to expand the **Price** section, and do the following:
4. Enter the **Default Product Price**.

   If the default price is not set, it is considered equal to zero. As a result, a user with Edit access rights for product status and Read access rights for product prices can create products which will appear in the store with a price of zero.

5. When complete, click the **Save Config** button.

Product Status Permissions

PERMISSION	RESTRICTIONS
Read	The Status field of the products is unavailable for editing. When creating a product, the field is unavailable for editing and is set to Disabled. Performing mass Status change on the Products page is unavailable.
Edit	The Status field of the products is available for editing by the backend user.

Product Price Permissions

PERMISSION	RESTRICTIONS
Read	When editing existing products or performing mass change of attributes values, all fields on the Prices tab are displayed, but are unavailable for editing. When creating a new product, the Price field on the Prices tab is unavailable for editing, and is set to the default value. All other price related fields on this tab (Special Price, Special Price From/To Date, Tier Price; if MAP is enabled, all MAP related settings) are not displayed. For gift card products, the Amount field on the Prices tab is unavailable for editing and is set equal to the default price value. All other amount-related fields (Allow Open Amount, Open Amount Min Value, Open Amount Max Value) are not displayed. Management of recurring profiles is unavailable. When creating a new product, the Enable Recurring Profile attribute is set to No and is unavailable for editing. When adding custom options, or associated products for configurable products, or links for downloadable products, the Price field is unavailable for editing and is set to zero, and the Price Type field is unavailable for editing and is set to Fixed.
Edit	The admin user has the right to access and change all price-related fields and columns of the product management section.
No Permission	All price related fields and columns are hidden. On the Prices tab, for both new and existing products, the Price, Special Price, Tier Price, Cost (if applied), Special Price From Date, Special Price To Date attributes, and all MAP-related settings are hidden. For new products the Price is set to the default value. The same logic applies to the Amounts and the Allow Open Amount, Open Amount Min Value, and Open Amount Max Value fields for the gift card products. For both new and existing products, the Enable Recurring Profile field is displayed, but is unavailable for editing. For the existing products, all other fields related to the product profile are hidden. For new products the Enable Recurring Profile field is set to No. On the Related Products, Up-sells, Cross-sells tabs of the product view, the Price column in the grids is not displayed. On the Custom Options tab, Associated Products tab of the product view, the Price and Price Type columns in the grids are not displayed. When adding a new custom option or a new associated product for a configurable product, the Price and Price Type fields are hidden. For new entries, the Price is set to zero, and the Price Type is set to Fixed.

PERMISSION	RESTRICTIONS
	On the Downloadable Information tab for downloadable products, the Price column is hidden. For the new rows the Price is set to zero. On the Manage Products and Category Products pages (Categories > Manage Categories > Category Products tab), the Price columns in the grids are hidden. In the customer's shopping cart views (accessible from the Customer's page), the Price, Total and Subtotal columns are hidden. Admin users without Read or Edit permissions can still see product option prices when configuring products for customers' shopping carts.

REST Roles

The REST API defines a set of functions that developers can use to perform requests and receive responses. To learn more about REST permissions, see: Web Services.

Unlocking Admin Accounts

For the security of your business, user accounts are locked after six failed attempts to log in to the Admin. The account can be unlocked by any other user with full Administrator permissions.

To unlock an admin account:

1. On the Admin menu, select **System > Permissions > Locked**.

   Any locked user accounts appear in the list.

2. In the list, select the checkbox of the locked account.
3. In the upper-right corner, set the **Actions** control to "Unlock."
4. Click the **Submit** button to unlock the user account.

Notes

Chapter 67:

Security

Maintaining a secure environment for the operation of your store is of utmost importance to the success of your business. In this chapter , you will learn how to manage Admin sessions and credentials; implement CAPTCHA; and manage website restrictions, encryption, hashing, and events logging.

Topics in this chapter:

- Security Configuration
- Website Restrictions
- CAPTCHA
- Encryption & Hashing
- Admin Actions Log

Security Configuration

The security settings give you the ability to control the lifetime of user sessions, timeouts, and passwords; and and whether to allow your Magento store to run in a frame. (This setting can prevent clickjacking.) In addition you can add a secret key to URLs, and determine the case sensitivity of login credentials.

For security reasons Magento strongly recommends against running your store in a frame.

Security Configuration

To configure Admin security:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Advanced, select **Admin**.
3. Click to expand the **Security** section, and complete the settings as needed.
4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Add Secret Key to URLs	Global	Options include: Yes / No
Login Is Case Sensitive	Global	Options include: Yes / No
Session Lifetime (seconds)	Global	Determines the length of a user session in seconds.
Allow Magento Backend to run in frame	Global	This option prevents “clickjacking” if you run your store in an iframe. Enabling the option causes the `X-Frame-Options` response

FIELD	SCOPE	DESCRIPTION
		header to be sent. Options include: Enabled/Only from same domain. For security reasons, it is recommended that this setting not be enabled.
Allow Magento Frontend to run in frame	Global	This option prevents "clickjacking" if you run your store in an iframe. Enabling the option causes the `X-Frame-Options` response header to be sent. Options include: Enabled/Only from same domain. For security reasons, it is recommended that this setting not be enabled.
Maximum Logon Failures to Lockout Account	Global	Determines the number of consecutive failed login attempts that will cause that account to become locked. If you do not want to enable the lockout feature, leave this field blank.
Lockout Time (minutes)	Global	Determines the duration, in minutes, for which the account will be locked after the failed logins.
Password Lifetime (days)	Global	Determines the duration, in days, until Magento will request an administrator to change their password. If you do not want to enable the password lifetime feature, leave this field blank.
Password Change	Global	Determines if administrators are required to change their passwords when the password lifetime is reached. Options include: Forced — Administrators are required to change their passwords when they expire. Recommended — Administrators are notified when the password expires, but are not required to change the password.

Website Restrictions

Website restrictions give you the ability to either shut down access to your site completely while performing maintenance, or restrict access to specific customers. For private sale or B2B websites, you can require that customers log in to view the site.

Closed for Maintenance

To temporarily close your website when performing maintenance, you can do so easily by setting the website restrictions to "website closed." This will temporarily redirect site visitors to a landing page of your choice.

To restrict access to an entire website:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **General**.
3. Click to expand the **Website Restrictions** section, and complete the fields as described below.

Website Restrictions

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION	
Access Restriction	Website	Determines whether the website restriction features are enabled. Options include:	
		Yes	Website access is restricted in the manner set in the fields below.
		No	Restrictions are disabled and the following settings have no effect.
Restriction Mode	Website	There are three possible modes. Options include:	
		Website Closed	All access to the frontend website is restricted and the website is essentially "closed." All frontend URLs are temporarily redirected to the page specified as the Landing Page below. This setting can be useful during site maintenance or just prior to launch.
		Private Sales: Login Only	Users can only access the frontend website if they first log in. All frontend URLs are temporarily redirected to either the specified landing page or to the login form until the user logs in. Users cannot create a new account themselves when the site is in this mode.
		Private Sales: Login and	Users can only access

FIELD	SCOPE	DESCRIPTION
		the frontend website if they first log in. All frontend URLs are temporarily redirected to the login form until the user logs in. Users can create a new account themselves when the site is in this mode.
Startup Page	Store View	Determines whether the site displays the login form or a landing page until a user logs in. This setting is only applicable in Private Sales mode (if the previous setting is either Private Sales: Login Only or Private Sales: Login and Register), because the Website Closed option prohibits users from logging in altogether. Options include: To login form — Users are redirected to the log in form until they log in. To landing page — Users are redirected to the static page specified below until they log in. **Important!** Be sure to include a link to the login page from the specified landing page so that customers can log in to access the full site.

FIELD	SCOPE	DESCRIPTION
Landing Page	Store View	Specifies the landing page users see either when the website is closed or when you have chosen to start up from a landing page in Private Sales mode.
HTTP Response	Website	Specify the HTTP response sent out when your website is closed and a connection is attempted by bots, crawlers, or spiders. Options include: 503 Service unavailable — The page is not available, and the index will not be updated. 200 OK — The landing page returned is the correct page, and the spider might assume the landing page is the only page on the site.

CAPTCHA

CAPTCHA is an acronym for "Completely Automated Public Turing test to tell Computers and Humans Apart." A CAPTCHA is a visual device that ensures that a human being, rather than a computer, is interacting with the site. CAPTCHA can be used for both the Admin and customers.

- Admin CAPTCHA
- Customer CAPTCHA

Users can reload the displayed CAPTCHA by clicking the Reload icon in the upper right corner of the image. The number of reloads is not limited.

The Magento CAPTCHA was implemented using a Zend Framework module, and is fully configurable.

CAPTCHA in Customer Login

Admin CAPTCHA

For an extra level of security, you can add a CAPTCHA to the Admin Login page. Administrator users can reload the displayed CAPTCHA by clicking the Reload icon in the upper-right corner of the image. The number of reloads is not limited.

Admin CAPTCHA

To configure CAPTCHA for the Admin:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Advanced, select **Admin**.
3. In the upper-right corner, set **Current Configuration Scope** to "Default."
4. Click to expand the CAPTCHA section, and complete the settings as described below.
5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable CAPTCHA in Admin	Global	Enables CAPTCHA for the Admin login page. Options include: Yes / No
Font	Global	Determines the font used to display the CAPTCHA. To add your own font, put the font file in the same directory as your Magento instance and specify it in the config.xml file at: app/code/core/Mage/Captcha/etc/
Forms	Global	Determines the form where the CAPTCHA is used. Available options: Admin Login / Admin Forgot Password.
Displaying Mode	Global	Defines preconditions for displaying CAPTCHA. Available options:

FIELD	SCOPE	DESCRIPTION
		Always — CAPTCHA is always required to log in the Admin. After number of attempts to login — When selected displays the Number of Unsuccessful Attempts to Login field. Enter the number of login attempts allowed. A value of 0 (zero) is similar to setting Displaying Mode to Always. This option does not cover the Forgot Password form. If CAPTCHA is enabled and set to be appear on this form, then it is always included on the form. To track the number of unsuccessful login attempts, all attempts to log in from one email address from a single IP-address are counted. The maximum number of login attempts allowed from a single IP-address is 1,000. This limitation applies only when CAPTCHA is enabled.
CAPTCHA Timeout (minutes)	Global	Determines the lifetime of the current CAPTCHA. After the CAPTCHA expires, the user must reload the page.
Number of Symbols	Global	Determines the number of symbols that are used for creating CAPTCHA. Maximum allowed value is 8. You can also specify a range, for example, 5-8; each generated CAPTCHA can contain different number of symbols.
Symbols Used in CAPTCHA	Global	Determines the symbols used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of symbols suggested in the field excludes similar looking symbols like “i”, “l”, “1”. Displaying these symbols in CAPTCHA decreases the chances that a user will

FIELD	SCOPE	DESCRIPTION
		recognize CAPTCHA correctly.
Case Sensitive	Global	Determines if the letters used in the CAPTCHA are case sensitive.

Customer CAPTCHA

CAPTCHA can be required to log in to a customer account, or be configured to appear after several unsuccessful attempts.. It can also be used for other forms in the storefront.

Customer CAPTCHA Configuration

To configure CAPTCHA for customers:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Customers, select **Customer Configuration**.
3. Set **Current Configuration Scope** to the website where you want the configuration to apply.
4. Click to expand the **CAPTCHA** section, and complete the fields as described below.
5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable CAPTCHA on Frontend	Website	Enables the CAPTCHA in the storefront. Options include: Yes / No
Font	Website	Determines the font that is used to display the CAPTCHA. To add your own font, put the font file in the same directory as your Magento instance and specify it in the config.xml stored at: app/code/core/Mage/Captcha/etc/
Forms	Website	Determines the form(s) where CAPTCHA is used. Options include: Create User Login Forgot Password Checkout as Guest Register during Checkout.
Displaying Mode	Website	Determines when the CAPTCHA appears. Options include: Always — CAPTCHA is always required to log in. After number of attempts to login — When selected displays the Number of Unsuccessful Attempts to Login field. Enter the number of login attempts allowed. A value of 0 (zero) is similar to setting Displaying Mode to Always. This option does not cover the Forgot Password and Create User forms. If CAPTCHA is enabled and set to be appear, then it is always included on these form. To track the number of unsuccessful login attempts, all attempts to log in from one email

FIELD	SCOPE	DESCRIPTION
		address from a single IP-address are counted. The maximum number of login attempts allowed from a single IP-address is 1,000. This limitation applies only when CAPTCHA is enabled.
CAPTCHA Timeout (minutes)	Website	Determines the lifetime of the current CAPTCHA. When the CAPTCHA expires, the user must reload the page.
Number of Symbols	Website	Determines the number of symbols that are used in the CAPTCHA. Maximum allowed value is 8. You can also specify a range, for example, 5-8.
Symbols Used in CAPTCHA	Website	Determines which symbols are used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of symbols suggested in the field excludes similar looking symbols like i, l, or 1. Displaying these symbols in CAPTCHA decreases the chances that a user will recognize CAPTCHA correctly.
Case Sensitive	Website	Determines if the characters used in the CAPTCHA are case sensitive. Options include: Yes / No

Encryption & Hashing

Magento Enterprise Edition hashes all data that does not require decryption by using a strong SHA-256 hashing algorithm instead of the previously used MD5. Legacy passwords will be hashed using the new algorithm whenever they are entered by customers, and all new passwords will be hashed using the SHA-256 algorithm.

Magento Enterprise Edition also encrypts all data that does require decryption by using an industry-standard AES-256 algorithm. This includes credit card data and integration (payment and shipping modules) passwords.

Changing the Database Key

Magento Enterprise Edition provides a tool to change the database key that is used for data encryption and decryption. This database key was generated when Magento was originally installed in your production environment. The key should be changed if the old key is ever compromised, as well as on a regular basis to improve security. When the key is changed, all legacy data is re-encoded using the new key.

Step 1: Make the File Writable

To make key change possible, the following file must be writable:

```
/opt/home_trials/baron/app/etc/local.xml
```

Step 2: Change the Encoding Key

1. On the Admin menu, select **System > Manage Encryption Key**.
2. Select whether or not the new encryption key will generate automatically. If not, a New Key field appears so you can manually enter a new key.
3. When complete, click the **Change Encryption Key** button.

   The encryption key is changed and all previous data is encoded with the new key. The new encryption key appears for reference.

   Write down the new key and keep it in a safe place. It will be required to decrypt the data, if any problems occur with your files.

Admin Actions Log

Logging of administrator actions enables you to track of backend activities. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object on which the action was performed. Additionally the IP and date are always logged.

In addition, you can control how long the log entries are stored and how often they are archived. The Admin Actions archive lists the CSV log files that are stored on the server at: var/admin_logs. By default, the file name includes the current date in ISO format: yyyyMMddHH.csv.

Admin Actions Log

To set up the Admin Actions Log:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Admin, select **Admin Actions Logging**. Then, do the following:
   - To enable admin logging, select the checkbox of each module.
   - To disable admin logging, clear the checkbox of each module.

Admin Actions Log Setup

3. When complete, click the **Save Config** button.

To set up Admin Actions Log Archiving:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Admin, select **System**.
3. Click to expand the **Admin Actions Log Archiving** section, and complete the settings as described below.

Admin Actions Log Archiving

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Log Entry Lifetime, Days	Store View	Determines how long the log entries are stored in the database before being removed. If there are many administrators working on the site, you can change this value from the default (60 days) to a lower value to avoid filling the capacity of the database.
Log Archiving Frequency	Store View	Determines how often old events are saved to the archive. Options include: Daily / Weekly / Monthly For log cleaning to work, the Magento cron job must be set up.

Admin Actions Log Report

The Admin Actions Log report includes every activity that has taken place during the lifetime specified for log entries. Report columns include a timestamp, action group and action taken, username, result, and name of the affected module. If applicable, the Item_id column displays the ID of an affected item, such as customer ID, order ID, or product ID.

The log data can be exported to CSV or XML format using the Export control at the top of the report.

To view the Admin Actions Log Report:

1. On the Admin menu, select **System > Admin Actions Log > Report**.
2. To view the Admin User Data for any log entry, click the **View** link.

Log Entry Admin User Data

To export the report:

1. Before exporting the data, use the list controls to filter and sort the data that you want to include.
2. Set the **Export to** control to one of the following formats:
   - CSV
   - Excel XML
3. Click the **Export** button.

To archive the log:

1. On the Admin menu, select **System > Admin Logging > Archive**.
2. Click the file name to download the archived file.

Notes

Enterprise
EDITION

System Operations

Chapter 68:

Index Management

Indexing is how Magento transforms data such as products, categories, and so on, to improve the performance of your web store. As data changes, the transformed data must be updated—or reindexed. Magento has very sophisticated architecture that stores merchant data (including catalog data, prices, users, stores, and so on) in many database tables. To optimize storefront performance, Magento accumulates data into special tables using indexers.

For example, suppose you change the price of an item from $4.99 to $3.99. Magento must reindex the price change to display it on your store. Without indexing, Magento would have to calculate the price of every product on the fly—taking into account shopping cart price rules, bundle pricing, discounts, tier pricing, and so on. Loading the price for a product would take a long time, possibly resulting in cart abandonment.

Topics in this chapter:

- Index Modes
- Index Configuration
- Manual Reindexing
- Index Scheduling

Accessing Index Management

The Index Management tool can be accessed from the System menu, or by clicking the link in the message that appears at the top of the workspace when indexes are out of date.

Index Management

To access Index Management:

1. On the Admin menu, select **System > Index Management**.

   Index Management has a slightly different presentation, depending on your configuration:

   - If you use Solr search engine for full-text catalog.
   - If you use Flat catalog product options.

2. Any indexer with a checkbox next to its name can be managed manually. The other indexers update automatically according to your Magento cron job. The default mode for each indexer is set in the system configuration.

Column Descriptions

COLUMN	DESCRIPTION
Index	The name of the indexer.
Description	A description of the indexer.
Mode	Applies only to the indicated indexers. Most of the indicated indexers are set to Update on Save, which means a reindex is required when a change is saved.
Status	Displays one of the following: Reindex Required — A change has been made that requires reindexing. If a checkbox and Reindex Required link appears, can be reindexed manually. Ready — The index is up-to-date.

COLUMN	DESCRIPTION
	Scheduled — Reindexing is scheduled to take place. Running — Reindexing is currently running. The following options apply only to the automatic indexers: Scheduled — Reindexing is required but hasn't run yet according to your Magento cron job. Running — Rreindexing is required and is either running or in the queue. Outdated — Indicates reindexing is required but there is an issue preventing it from running. If this state persists, submit a bug report.
Update Required	Applies only to the indicated indexers. Indicates whether or not you must manually reindex. (The value in the Mode column indicates whether the indexer must be manually updated.)
Updated At	Displays the date and time an index was last manually updated, or Never if the index has never been manually updated.
Action	Indexers that require manual updating display a Reindex Data link. Click the link to reindex only that option.

Index Modes

Magento reindexes automatically whenever one or more items are changed (for example, price changes, catalog or shopping cart price rules are created, new categories added, and so on). Reindexing is performed as a background process; your store is accessible during all reindexing processes.

The default mode for each indexer is specified in the system configuration. By default, indexers that require manual updating are set to "Update on Save," which means reindexing occurs after a change is made from the Admin. The other option is to manually reindex every time a change is made. (For example, if you change product attributes in the Admin, you must manually update the Product Attributes index.) If you ever need to override the default index mode, you can use the Action control.

To change the index mode:

1. On the Admin menu, select **System > Index Management**.
2. Select the checkbox of each indexer you want to change.
3. Set **Actions** to "Change Index Mode." Then, set **Index Mode** to one of the following:
   - Update on Save
   - Manual Update
4. Click the **Submit** button to apply the change to each selected indexer.

Events that Trigger Reindexing

INDEX TYPE	REINDEXING EVENT
Product Prices	Add customer group Change configuration settings
Flat catalog[1] product data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)
Flat catalog category data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)

[1]The flat product and category indexers also influence how catalog and shopping cart price rules are indexed. If you have a large number of SKUs (about 500,000 or more), you will notice a dramatic improvement in indexing time for price rules. To take advantage of this improvement, you must enable Use Flat Catalog Product.

INDEX TYPE	REINDEXING EVENT
Catalog category/product index	Add, edit, or delete products (single, mass, and import) Change product-to-category relations Add, edit, or delete categories Add or delete stores Delete store groups Delete websites
Catalog search index	Add, edit, or delete products (single, mass, and import) Add or delete stores Delete store groups Delete websites
Stock status index	Change inventory configuration settings.
Category permissions index	Add store, add store group, add or delete or update attribute (for searching and filtering)

Index Actions and Controls

ACTION	RESULT	TO CONTROL
Creating a new store, new customer group, or any action listed in "Actions that Cause a Full Reindex."	Full reindex	Full reindexing is performed on the schedule determined by your Magento cron job. In a few cases, full reindexing must be performed manually.
Bulk loading of items in the following ways: • Magento import/export • Direct SQL query • Any other method that directly adds, changes, or deletes data.	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.
Changing scope (for example, from global to website)	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.

Events that Trigger Full Reindexing

INDEXER	EVENT
Catalog Category Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following: • Searchable or visible in advanced search • Filterable • Filterable in search • Used for sorting Change an existing attribute to be any of the preceding. Enable flat category frontend options
Catalog Product Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following: • Searchable or visible in advanced search • Filterable • Filterable in search • Used for sorting Change an existing attribute to be any of the preceding. Enable flat category frontend options
Stock status indexer	When the following Catalog Inventory options changes in the system configuration: Stock Options — Display Out of Stock Products Product Stock Options — Manage Stock
Price Indexer	Adding a new customer group. When any of the following Catalog Inventory options changes in the system configuration: Stock Options — Display Out of Stock Products Product Stock — Manage Stock

INDEXER	EVENT	
	Options	
	Price	Catalog Price Scope
Category or Product Indexer	Create or delete a store view Delete a store Delete a website	

Index Configuration

The default mode for each indexer is set in the system configuration. For most indexers, the default mode can be overridden from the Index Management page.

For example, to schedule the category flat catalog and the category flat product index using your Magento cron job and to immediately reindex everything else, choose the following options:

Category Flat Index:	Updates when scheduled.
Product Flat Index:	Updates when scheduled.
All other indexers:	Updates on Save.

To configure indexing options:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Advanced, select **Index Management**.
3. Click to expand **Indexing Options**. Then, set each index to one of the following:

Update on Save	Immediately performs a partial reindex when an item changes.
Update When Scheduled	Updates the index according to your Magento cron job.

Index Options

4. When complete, click the **Save Config** button.

Configuration by Indexer Type

INDEXER TYPE	CONFIGURABLE?	
Catalog Category/Product Index	No	Configure only partial reindexing frequency.
Category URL Rewrite	Yes	Also configure partial reindexing frequency.
Product URL Rewrite	Yes	Also configure partial reindexing frequency.
Redirect URL Rewrite	No	Configure only partial reindexing frequency.
Category Flat Index	Yes	Also configure partial reindexing frequency.
Product Flat Index	Yes	Also configure partial reindexing frequency.
Price and Stock Index	No	Configure only partial reindexing frequency.
Category Permissions	No	Category permissions indexing occurs automatically and is not configurable.

Manual Reindexing

Indexers that require manual updates have a checkbox in the first column next to their name (Product Attributes, Tag Aggregation Data).

- If the Status column indicates “Reindex Required,” and the Update Required column indicates “No,” only a partial index is produced when you index manually.
- If the Status column indicates “Reindex Required,” and the Update Required column indicates “Yes,” a full index is produced when you index manually.

Index States

To reindex manually:

1. On the Admin menu, select **System > Index Management**.
2. Select the checkbox of each item to be reindexed.
3. Set **Actions** to “Reindex Data.”
4. Click the **Submit** button.

Index Scheduling

For most indexers, you can use one of two scheduling methods:

Method 1: Immediate Partial Reindex

A partial index displays the results immediately in the store. We recommend that you use immediate partial reindexing unless many items are being updated by multiple users at the same time. If in doubt, you can check the system resource utilization using `top`, or a similar command.

Method 2: Cron Job

It is recommended that you set up a cron job to manage index scheduling for stores with a high traffic load, or if many items are updated at the same time by multiple users. To learn more, see: How to Set Up a Cron Job.

Index Cleanup

Each time the partial reindexing job runs, a record is created in the Magento database to indicate the status of the job. These records can be used for troubleshooting in case a job fails. However, the "success" records take up space in the database, and should be removed periodically.

The Index Management page gives you the ability to clean up the index by removing the "success" records that occur during a partial index. The process can take anywhere from a few seconds to a few minutes, depending on the number of records. We recommend that you clean the index once per day during off-peak hours.

> Cleaning the index has a negligible effect on server performance, and no effect on customers in the store.

To schedule indexing:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Advanced, select **Index Management**.
3. Click to expand **Index Clean Schedule**. Then, do the following:

Index Clean Schedule

   a. Set **Enable Scheduled Cleanup** to "Yes."
   b. Set the **Start Time** to the hour, minute, and second.

c. Set **Frequency** to one of the following:

- Daily
- Weekly
- Monthly

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable Scheduled Cleanup	Global	Enables a scheduled cleanup of partially-indexed records. Options include: Yes / No
Start Time	Global	Specifies the hour, minute, and second the cleanup is scheduled to begin. The time is entered in 24-hour format and is based on the clock on your Magento server.
Frequency	Global	Specifies how often the index is to be cleaned. Options include: Daily — (Recommended) Cleans the index once per day. Weekly — Clean the index once per week on the first day of the week. Monthly — Clean the index once per month on the first day of the month.

Chapter 69:

Cache Storage

Using Magento's cache management system is an easy way to improve the performance of your site. The Cache Storage Management page shows the status of each primary cache and its associated tag. Whenever one of the caches needs to be refreshed, a notice appears at the top of the workspace to guide you through the process.

There are separate command buttons to flush the Magento-specific cache, and the more all-inclusive cache storage. In addition, there are command buttons to flush the catalog product images cache and JavaScript/CSS cache.

On the server, the default location for the primary Magento cache is var/cache. As an alternative to using the Cache Management tool, the contents of each cache can be manually deleted from the server.

Topics in this chapter:

- Clearing Caches
- Full-Page Cache

Clearing Caches

After clearing a cache, always refresh your browser to make sure that it uses the most recent files.

Cache Storage Management

To refresh specific caches:

1. Do one of the following:

   - Click the **Cache Management** link in the message at above the workspace.
   - On the Admin menu, select **System > Cache Management**.

   The status of each cache that needs to be refreshed appears in yellow and marked, "Invalidated."

Cache Refresh Needed

2. Do one of the following:
   - For each cache that needs to be refreshed, click the checkbox at the beginning of the row.
   - To select a group, click one of the selection options above the list.
3. Set **Actions** to "Refresh," and click the **Submit** button.

Refreshing Multiple Caches

To flush the product image cache:

1. From the Cache Storage Management page, under Additional Cache Management, click the **Flush Catalog Images Cache** button.

   The message, “Image cache was cleaned” appears at the top of the workspace.

2. Make sure to also clear the cache of your browser.

To flush the JavaScript/CSS cache:

1. From the Cache Storage Management page, under Additional Cache Management, click the **Flush JavaScript/CSS Cache** button.

   The message, “The JavaScript/CSS cache has been cleaned” appears at the top of the workspace.

2. Clear the cache of your browser.

Buttons

BUTTON	DESCRIPTION
Flush Magento Cache	Removes all items in the default Magento cache (var/cache), according to its associated Magento tag.
Flush Cache Storage	Removes all items from the cache, regardless of Magento tag. If your system uses an alternate cache location, any cached files used by other applications will be removed in the process.
Flush Catalog Images Cache	Removes all automatically resized and watermarked catalog images that are stored at: media/catalog/product/cache. If recently uploaded images aren't reflected in the catalog, try flushing the catalog and refreshing your browser.
Flush JavaScript/CSS Cache	Removes the merged copy of JavaScript and CSS files from the cache. If recent changes to the style sheet or JavaScript aren't reflected in the store, try flushing the JavaScript/CSS cache and refreshing your browser.

Cache Types

TYPE	DESCRIPTION
Configuration	System and module configuration files. Associated tag: `CONFIG` System: config.xml, local.xml Module: config.xml
Layouts	Page layout building instructions. Associated tag: `LAYOUT_GENERAL_CACHE_TAG`
Blocks HTML Output	The HTML that is associated with page blocks. Associated tag: `BLOCK_HTML`
Translations	Language translation files. Associated tag: `TRANSLATE`
Collections Data	Files that contain data that is the result of a query. Associated tag: `COLLECTION_DATA`
EAV Types and Attributes	Attribute entities, types, and values. Associated tag: `EAV`
Web Services Configuration	Web Services definition files (api.xml) Associated tag: `CONFIG_API`
Web Services Configuration	Web Services definition files (api2.xml) Associated tag: `CONFIG_API2`
Page	Full page cache. Associated tag: `FPC`

Additional Cache Management

BUTTON	DESCRIPTION
Flush Catalog Images Cache	Removes all automatically resized and watermarked catalog images that are stored at: media/catalog/product/cache. If recently uploaded images aren't reflected in the catalog, try flushing the catalog and refreshing your browser.
Flush Swatch Images Cache	Removes pregenerated swatch image files.

BUTTON	DESCRIPTION
Flush JavaScript/CSS Cache	Removes the merged copy of JavaScript and CSS files from the cache. If recent changes to the style sheet or JavaScript aren't reflected in the store, try flushing the JavaScript/CSS cache and refreshing your browser.
Re-build Visual Merchandiser categories	Rebuilds the categories.

Full-Page Cache

Magento Enterprise Edition uses full-page caching on the server to quickly display category, product, and CMS pages.

Topics in this section include:

- Types of Page Visits
- Page Cache Setup
- Page Cache Actions

Full-page caching improves response time and reduces the load on the server. Without caching, each page might need to run blocks of code and retrieve information from the database. However, with full-page caching enabled, a fully-generated page can be read directly from the cache.

Types of Page Visits

Cached content can be used to process the requests from similar types of visits. As a result, pages shown to a casual visitor might differ from those shown to a customer. For the purposes of caching, each visit is one of three types:

Non-sessioned

During a non-sessioned visit, a shopper views pages, but does not interact with the store. The system caches the content of each page viewed, and serves them to other non-sessioned shoppers.

Sessioned

During a sessioned visit, shoppers who interact with the store—through activities such as comparing products or adding products to the shopping cart—are assigned a session ID. Cached pages that are generated during the session are used only by that shopper during the session.

Customer

Customer sessions are created for those who have registered for an account with your store and shop while logged in to their accounts. During the session, customers can be presented with special offers, promotions, and prices that are based on the customer group to which they are assigned.

Page Cache Setup

The default configuration settings for the page cache can be used "as is" or changed as needed. The site administrator can determine how deeply site content is cached for each page.

Full-page caching is enabled by default and can be used as needed. It's generally a good idea to disable page caching while a site is in development, and enable it when the site goes live. After making content changes to products, CMS pages or blocks, you can refresh the page cache to update the content.

To change the cache configuration:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left under Advanced, select **System**.
2. Click to expand the **Full Page Cache Settings** section, and do the following:

Full Page Cache Settings

   a. Set **Max Allowed Page Depth** to the maximum number of layered navigation filters or parameters to be cached per page.
   b. If you want to cache pages for only the default currency, set **Enable Cache for Not Default Currencies** to "No."
   c. Enter the **Max. Cache Size** in megabytes.
3. Click the **Save Config** button to save your settings.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Maximum Allowed Page Depth	Store View	Determines the number of layered navigation filters, or parameters that are cached with the page. For example, each filter that is applied to a page is considered to be another parameter. If page depth is limited to two, each filter is cached, as well as any combination of two filters. To control the number of cached files that are stored, combinations of three or more filters are not cached.
Enable Cache For Not Default Currencies	Store View	Determines if pages with currencies other than the default currency are cached. Yes — Enables page caching for all currencies allowed in the store. Each allowed currency represents another variant of the same page. When enabled, this option greatly increases the size of the cache. No — Only pages for the default currency are cached.
Max Cache Size	Store View	Determines the maximum size of the full-page cache, in megabytes. By default, the cache is set to 1024 MB.

Page Cache Auto-Generation

Magento pages are typically cached when the page is visited for the first time. However, when a site first goes live, or after making a large number of content changes, you might want to force a full regeneration of the page cache. The entire website is crawled during the auto-generation process, which creates more cached pages than would be produced by page visits alone. Auto-generating the page cache ensures that each page in the site loads quickly the first time, and every time thereafter.

Because the auto-generation process is resource intensive, it should be initiated during low-traffic hours. It is recommended that you auto-generate the full-page cache only as needed, and flush the Magento cache to trigger the process. Afterward, you can disable the auto-generate process until the next time you want to regenerate the full page cache.

Step 1: Configure Page Cache Auto Generation

1. On the Admin menu, select **System > Configuration**. In the panel on the left under Advanced, select **System**.
2. Click to expand the **Full Page Cache Auto Generation** section. Then, do the following:

Full-Page Cache Auto Generation

   a. To regenerate the full-page cache, set **Enable Page Cache Auto Generation** to "Yes,"
   b. In the **Crawler Thread Number** field, enter the number of parallel requests you want to make during the process. Parallel requests can speed up the process, but require more system resources. In most cases, it is recommended to use from one to five.
   c. To avoid caching pages with currencies other than the default. set **Generate Page Cache for Not Default Currencies** to "No."
3. When complete, click the **Save Config** button.

Step 2: Flush the Magento Cache

1. On the Admin menu, select **System > Cache Management**.
2. In the upper-right corner, click the **Flush Magento Cache** button.

Flush Magento Cache

Field Descriptions

FIELD	DESCRIPTION	
Enable Pages Cache Auto Generation	Yes	Enables Page Cache Auto Generation, but does not cause the page cache to be auto-generated. After enabling the process, go to Cache Management screen (System > Cache Management) and flush the Magento cache. This action will trigger the auto-generation process.
	No	The page cache will not be generated by a crawler and will be generated only as visitors visit each page on your site.
Crawler Thread Number	Determines the number of parallel requests during this process. The crawler class that emulates the first visit to a page can work in a multi-thread mode. A higher number of threads will reduce the amount of time required to cache all pages; however, it will also consume more system resources. Be careful with this option. Depending on your hardware and server configuration, it is recommended that you use no more than one to five parallel threads.	
Generate Pages Cache For Not Default Currencies	Determines whether pages with currencies other than the default currency will be cached.	

Page Cache Actions

If the content of a block on a cached page changes, the cached page is retrieved, the block overwritten, and the updated page is saved back to the cache. The page cache can be built gradually as pages are visited, or auto-generated for the entire site.

To manage cache operations:

1. On the Admin menu, select **System > Cache Management**.

Page Cache Actions

2. Under Cache Storage Management, select the **Page Cache** checkbox. In the upper-right, set the **Actions** control to one of the following:

Enable	Turns on page caching. By default, the page cache is enabled.
Disable	Turns off page caching.
Refresh	Clears the page cache. If Page Cache is enabled, new pages are added to the cache as they are visited. If Full-Page Cache Auto Generation is enabled, refreshing the page cache triggers the process.

3. Click the **Submit** button to apply the action.

Notes

Chapter 70:

Alternate Media Storage

Magento Enterprise Edition gives you the option to store media files in a database on a database server, or on a Content Delivery Network (CDN), as opposed to storing them on the file system of the web server. The advantage of using alternate storage is that it minimizes the effort required to synchronize media when multiple instances of the system that are deployed on different servers that need access to the same images, CSS files, and other media files.

Topics in this chapter:

- Media Storage Database Setup
- Media Storate CDN Setup

Media Storage Database Setup

By default, all images, compiled CSS files, and compiled JavaScript files of the Magento instance are stored in the file system on the web server. You can choose to store these files in a database on a database server. One advantage of this approach is the option of automatic synchronization and reverse synchronization between the web server file system and the database. You can use the default database to store media or create a new one. To be able to use a newly created database as media storage, you must add information about it and its access credentials to the local.xml file.

Database Workflow

When the customer opens the store page, its browser requests the HTML code and the media specified in the HTML code from the Magento system. The system searches the requested media in the file system and passes it to the browser, if it is found. If the system does not find the media in the file system, it requests the media from the database specified in the settings, places the media to the file system, and sends it to the customer's browser.

To get the files from the database to the file system on the web server a PHP script is used. When the browser requests media from the web server, there are two alternatives for when a PHP script is run:

- If web server rewrites are enabled in the Magento system and supported by the server, the PHP script is run only when the requested media is not found in the web server file system.
- If web server rewrites are disabled in the Magento system or not supported by the server, the PHP script is run in any case, even when the required media exists in the file system of the web server.

To use a database for media storage:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Advanced, select **System**.
3. This configuration takes place at the global level, so set **Current Configuration Scope** to "Default Config."
4. Click to expand the **Storage Configuration for Media** section. Then, do the following:

Storage Configuration for Media

a. Set **Media Storage** to “Database.”

b. Set **Select Media Database** to the database you want to use.

c. Click the **Synchronize** button to transfer the existing media to the newly selected database.

d. Enter the **Environment Update Time** in seconds.

5. When complete, click the **Save Config** button.

Media Storage CDN Setup

Storing media files in a CDN is another alternative supported in Magento. There is no full integration with a specific CDN, and you are responsible for choosing and configuring a CDN on your own. After configuring the CDN, you must complete the configuration from the Admin. The changes can be made at either the global or website level.

CDN Workflow

When a CDN is selected as media storage, all paths to media on the web store pages are changed to paths to the CDN. Retrieving media that is stored in a CDN works as follows:

- When a customer opens a page in the store, the browser addresses the CDN with the request to acquire some media files, such as images.
- If the CDN does not yet have these images in its storage, it requests them from the server, and provides images to the customer’s browser.
- If the CDN already has the required images in storage, it simply serves the requested images to the customer's browser.

> **Important!** When a CDN is used as media storage, JavaScript may not function properly if the CDN is not in your subdomain. This is a browser security feature.

To configure a content delivery network:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **Web**.
3. Set the **Current Configuration Scope** as needed.
4. Click to expand the **Unsecure** section. Then, do the following:

Unsecure Configuration

a. Change the value of the **Base Media URL**.

b. Change the value of the **Base JavaScript URL**.

5. Click to expand the **Secure** section.

Secure Configuration

a. Change the value of the **Base Media URL**.

b. Change the value of the **Base JavaScript URL**.

6. When complete, click the **Save Config** button.

Chapter 71:

Installing Solr Search

Solr is not bundled with Magento and must be installed separately by your hosting firm or system administrator. Although Magento does not provide support for configuring Solr server we do provide Solr configuration and schema files to help your hosting firm or system administrator with the initial server configuration. Please contact the Magento Support team for assistance.

When you enable and configure Solr, quick search and advanced search are redirected to the Solr server, although the results appear in the same way as they would if using the default MySQL-based search.

During the installation process, you must specify the host name, port, and the password to connect to the server where Solr search engine is installed. You will need this information to complete the Solr configuration.

Topics in this chapter:

- Solr Server Configuration
- Solr Base File Setup

Solr Server Configuration

A number of parameters must be set up in the Magento Admin to establish the connection to the Solr search engine. Solr can be installed either on the same server as Magento, or on a different server. The following instructions cover the configuration for the Magento server installation.

To enable Solr:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under Catalog, select **Catalog**. Then, click to expand the **Catalog Search** section.
3. Set **Search Engine** to "Solr." When the Solr options appear, do the following:
   a. Enter the fully-qualified **Solr Server Hostname** or **IP address**.
   b. Enter the number of the port that is assigned to be the **Solr Server Port**.
   c. Enter the **Solr Server Password**.
   d. In the **Solr Server Timout** field, enter the number of seconds of inactivity that can pass before the connection times out.
   e. For a standard Solr installation, you can accept the default **Solr Server Path**. For a custom deployment, enter the installation path.
4. When complete, click the **Save Config** button.
5. When the initial Solr installation is complete, complete the search configuration to take full advantage of the capabilities of Solr.

Solr Catalog Search Configuration

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Minimal Query Length	Store View	The minimum number of characters allowed in a catalog search.
Maximum Query Length	Store View	The maximum number of characters allowed in a catalog search.
Maximum Query Words Count	Store View	The maximum number of words allowed in a query.
Search Engine	Global	Identifies the search engine used for the site. For this configuration, the search engine is: Solr
Solr Server Hostname	Global	The fully qualified host name or IP address of the Solr server.
Solr Server Port	Global	Identifies the port used by the Solr server. Any unused port can be assigned to Solr.
Solr Server Username	Global	(Optional) The Solr user name, if required for authentication.
Solr Server Password	Global	(Optional) The Solr password, if required for

FIELD	SCOPE	DESCRIPTION
		authentication.
Solr Server Timeout	Global	The number of seconds of inactivity before the server times out.
Solr Server Path	Global	Specifies the path to the Solr server. Accept the default entry, unless you have customized Solr or changed the deployment path. The value must match that in webapp_name-value in the Solr installation, and is entered without leading or trailing backslashes.
Indexation Mode	Global	Determines how Solr processes indexed content. Options include: Final commit — (Default) Offers better performance than a partial commit. Solr processes the content when you initiate a reindex. Users see content from the previous index, and the store remains available for other requests. Indexing begins after all unneeded data is removed and new data is added. Users see the results of the indexed data immediately. Partial commit — All content is removed after reindexing. As content is gradually reindexed, users see only the indexed results. Engine autocommit — Content is put into the index queue but is not committed. You must configure Solr to commit at regular intervals (for example, every 5 minutes) or when a certain number of uncommitted items is reached.
Enable Search Suggestions	Store View	Determines if search suggestions are displayed for common misspellings. When enabled,

FIELD	SCOPE	DESCRIPTION
		search suggestions are offered for any request that returns no results. Search suggestions can impact the performance of search. Options include: Yes / No
Search Suggestions Count	Store View	The maximum number of suggestions offered. Default value: 2
Show Results Count for Each Suggestion	Store View	Determines if the number of search results is shown for each suggestion. (Depending on theme, the number usually appears in brackets after the suggestion.) Options include: Yes / No
Enable Solr Engine for Catalog Navigation	Global	Determines if Solr is used for layered navigation. Options include: Yes / No

Solr Base File Setup

Solr includes the following base files that must be completed for every language used in the system. Solr supports search functionality for twenty languages. Solr calls the fields for the language used by the current store.

Solr Base Files

BASE FILES	DESCRIPTION
protwords.txt	Protected words. Use a protected word file to prevent the stemmer algorithm from reducing two unrelated words to the same base word.
spellings.txt	Definitions of misspelled words.
stopwords.txt	Words that stop the search (have no meaning for search).
synonym.txt	Synonyms for every language.

Notes

Chapter 72:

Content Staging

Content staging websites are hidden websites that can only be accessed through a password-protected URL. A content staging site can have the same domain as your live store, or a separate domain, but it runs on the same Magento installation and database as the live site.

> Content staging websites should never be used for code or development work.

Topics in this chapter:

- Content Staging Configuration
- Creating a Staging Site
- Managing a Staging Site

Staging Site Configuration

The configuration determines the point of entry to the staging site and its landing page.

To configure a content staging website:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, select **General**.
3. Click to expand the **Staging Websites** section. Then, complete the fields as described below.

Staging Websites

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Automatically Create Entry Points for Staging Websites	Global	Determines if the entry points (index files) for beta sites are created automatically. Options include: Yes — Generated entry points automatically. No — If you plan to host your Staging Websites on a separate domain, select No.
Folder Name for Entry Points	Global	If created automatically, will be created as subdirectories in this path. This folder must be writeable.
Close Website During Merge or Rollback	Global	Determines if access will be restricted to the live site while the merge or rollback is being performed. Options include:

FIELD	SCOPE	DESCRIPTION	
		No	If you select No, the site (s) can be accessed as usual.
		Close Entire Frontend	(Recommended) All sites are restricted.
		Close Only Relevent Websites	Access is restricted only to the site(s) involved in the merge or rollback activity.
Landing Page	Store View	Select the CMS page that will be shown if the site is closed during a merge or rollback activity.	

Creating a Staging Site

Magento Enterprise Edition allows you to create as many staging websites as required. You can also create Staging Websites based on other Staging Websites. This allows more people to work on different parts of the new content. The content can be merged to the beta Website, fully tested and reviewed, and finally merged to the production (live) Website.

Content Staging Workflow

From the Admin, a staging website is accessed in the same way as a normal website. You can create, edit, and delete content and products in exactly the same way. However, because it uses the same database as the live store, any products deleted from a staging site are deleted from the live store, as well. Set the configuration scope as you work to determine whether you're working on the staging site or the live site.

When your changes are approved, you can merge the staging website with the live website and do not have to re-enter data or configuration changes. During the merge, all the content assigned to the staging website is assigned to the live website, and all attributes on the staging website/store view level are copied to the matching live website/store view. All mapping and content selection details can be controlled by the administrator, so only the content and content types you want will be merged. Additionally, during merging, a rollback (backup) can be created.

To create a new content staging website:

1. On the Admin menu, select **System > Content Staging > Staging Websites**.

   This page lists all existing Staging Websites.

2. In the upper-right corner, click the **Add Staging Website** button. Then, do the following:

Staging Website Settings

a. Set **Source Website** to one of existing websites. Then, click the **Continue** button.

b. Complete the **Staging Website** section, using these field descriptions for reference.

Staging Website

3. In the Select Original Website Content to be Copied to the Staging Website section, select the checkbox of each type of content to be copied to the staging website.

Select Original Website Content to be Copied to the Staging Website

4. In the Select Original Website Store Views to be Copied to the Staging Website, select the checkbox of each store view that is to be copied to the staging website.

Select Original Website Store Views to be Copied to Staging

5. When complete, click the **Create** button to save your settings. You will be redirected to the Staging Websites list.

After the staging site is set up, you can edit content, and assign it to the Staging site, or change attributes at the Website or Store View level. You can also change the Label and Frontend Restriction options. A record of all changes to the site, such as creation, merge, or rollback, can be viewed on the Event History tab.

> **Important!** Never delete a product from a content staging website, because it will be deleted from the live site, as well. To remove a product from a content staging website, simply disable it.

Field Descriptions

FIELD	DESCRIPTION
Master Website Code	The name assigned to the staging environment, for internal reference.
Staging Website Code	Unique website code of the Staging Website. This field will be pre-populated with and automatically generated code, although you have the ability to modify the value.
Staging Website Name	Name of the Staging Website. This field will be pre-populated with and automatically generated name, although you have the ability to modify the value.
Frontend Restriction	Controls how the frontend of the Staging Website can be accessed. Options include: Not accessible — Disables access to the entire staging frontend. Accessible — The staging site is open and can be accessed by anyone that knows the URL. Require HTTP Authentication — The staging site will show a username and password prompt on access, which can be configured below.
HTTP Login	The user name required for HTTP Authentication.
HTTP Password	The password required for HTTP Authentication.

Merging Content

After making all the necessary content changes on the staging website you can merge or schedule merging of the staging website to another website. For a scheduled merge to be applied, the Magento cron job must be running on the server.

Only one backup can be created for each website per merge. Backups are created in the database and require significant database space. Because backups are not updated when Magento is updated, any table structure that changes during an update cannot be restored from a backup.

To merge or schedule a merging:

1. On the Admin menu, select **System > Content Staging > Staging Websites**.
2. In the list, click the the staging website that you want to merge.
3. Click the **Merge** button to open the mapping configuration page.
4. In the top section, define the mapping of the websites and store views. This controls which staging website is merged to which live website, and which staging store view is merged to which live store view.
   a. Select the **To Website**, which is the target website. The To website can be either the source website, or another website.
   b. Click **Add New Store View Map**.
   c. Select the **From** and **To Store Views**. Each option can be selected only once.
   d. Repeat this process to add maps for all store views that need to be merged.
5. Select the **Create a backup** checkbox to create a backup of the live site before merging.
6. In the list, select all items that you want to merge from the staging to the live website.
7. Click **Merge Now** or specify a date and time and click **Schedule Merge**.

Rolling Back Merged Content

If you have selected to create a backup when merging a website, a backup of the target website is created just before the merge. The backup contains only the tables that are related to the content staging merge, and is not a backup of the entire site.

To roll back content:

1. On the Admin menu, select **System > Content Staging > Backups**.
2. Find the backup in the list that you want to roll back, and open the record.
3. In the panel on the left, select **Rollback**. Then, choose the items that you want to restore. You can only select the items which are available.
4. Click the **Rollback** button. After the website is restored, you will be redirected to the backup grid.

> Items are available for rollback only if the table versions of the backup and original Website match. If they do not match, the rollback is not possible with Magento functionality. It can be carefully performed using manual database administration tools, however this is not recommended. The table version might change when an upgrade of the Magento system also changes the structure of some of the tables.

Rollback can be used either to restore content if an error is noticed after a merge, or to restore to a previous site version when the staging site is used for seasonal or temporary website changes.

Website Backup Information

TAB	DESCRIPTION
Backup General Info	Displays the basic backup information. Table Prefix is the prefix used for backup tables of this website in the database.
Rollback History	Displays events associated with this backup.
Rollback	Contains the list of items which are available for rollback.

Managing a Staging Site

Content staging is a very powerful tool, but requires caution to use it effectively. An important thing to understand is that the staging website it is not a separate beta website with a separate database. It is another website in the store that is hidden. Thus, creating and deleting content, such as products, requires special attention.

> **Important!** Never delete products from a content staging website, because they will be deleted from the live site, as well. To remove a product from a content staging website, simply disable it.

To remove products from a staging website:

1. On the Admin menu, select **Catalog > Manage Products**.
2. Click to open the product in edit mode. Then, do one of the following:
   - In the panel on the left, select **Websites**. Then uncheck the staging website that you want to disassociate from the product.
   - Set **Choose Store View** to the staging website. Then, on the General tab, set **Status** to "Disabled."
3. When complete, click the **Save** button.

   This product is removed from the staging website, but still exists in the production site, until a merge is performed.
4. Follow the instructions to merge the staging website into the production website.

   The product is now unassigned or disabled in the staging website, as well as in the production website. The product can be safely deleted, as it is no longer used.

To create a product on a staging website:

1. On the Admin menu, select **Catalog > Manage Products**.
2. In the upper-right corner, click the **Add Product** button. Then, do the following:
   a. Create the product as usual.
   b. In the panel on the left, select **Websites**. Then, assign the product only to the staging website.
   c. When complete, click the **Save** button.
3. Merge the Staging Website into the production Website by following the instructions.

   The product is now available in both the staging and production websites. Similar steps should be taken when working with other types of content.

To change the staging environment settings:

1. On the Admin menu, select **System > Content Staging > Staging Websites**.
2. Find the site in the list, and click to open the record in edit mode.
3. Make the necessary changes, and click the **Save** button.

Upgrading Magento

When using a staging website, take special care when upgrading Magento. Upgrades modify the staging website, but not the backups. In some cases, especially if the upgrade modifies content tables, an upgrade can render the backup unusable. It is recommended that you upgrade Magento either before you work on a staging website, or after a merge has been completed, confirmed, and no rollback is expected.

Chapter 73:

Magento Connect

Magento Connect is the marketplace for Magento extensions. There are hundreds of extensions and themes from all over the world. Magento out-of-the-box supports a few of the most popular ones. However, community members are developing and publishing new extensions in order to extend Magento with various new features.

In this chapter:

- Installing Extensions

Magento Connect

Installing Extensions

Many extensions are available on Magento Connect, and the installation process varies for each. Some extensions require additional configuration after the installation. Please read the documentation provided by the extension developer for specific instructions. The following instructions outline the general process. Before installing any extension, always backup your store.

To back up your store:

1. On the Admin menu, select **System > Magento Connect > Magento Connect Manager**.
2. Select the **Create Backup** checkbox and select the backup type.

   The backup is created automatically, and is listed under System > Tools > Backups.

To install an extension:

1. Go to Magento Connect.
2. Use the filters to browse through the available extensions.
3. On the page of the extension you want to install, do the following:
   a. If the extension is available for sale, click the **Get Extension** button. Then, follow the prompts to purchase the extension.
   b. Click the **Get Extension Key** key button.
   c. Click the link to read the license agreement, and if you agree to the terms, select the checkbox.

      An extension key similar to this appears: magento-core/Mage_xxxx. The key is a special link that Magento needs to install the extension to your store.
   d. Click **Select** to select the key, and press **Ctrl + C** to copy it to the clipboard.
4. Log in to your store Admin, and do the following:
   a. On the Admin menu, select **System > Magento Connect > Magento Connect Manager**.
   b. When prompted, enter your Admin **User Name** and **Password**. Then, click the **Log In** button.

Log In to Magento Connect Manager

c. In the Install New Extensions section, paste the **Extension Key**.

d. Click the **Install** button and wait for the installation to complete.

5. You can now return to your store Admin and use the extension.

   Look for new options in the related section of the Admin. For example, a payment extension will appear in System > Configuration > Sales > Payment Methods.

Notes

Chapter 74:

Web Services

Web services share information across networks using standards-based technologies. Information from your store can be shared with other Web-based services to help create a more integrated set of tools for your business.

Web services retrieve information from your store using an application programming interface, the Magento Core API. The Magento Core API includes all the parameters for data requests that other web services need to access information from your store.

Topics in this chapter:

- Magento Core API Settings
- Activating Web Services

Magento Core API Settings

The Magento Core API supports both SOAP and XML RPC protocols. The API is permission-based, and allows access to the Customer, Catalog, and Order modules of your store.

The WSDL (Web Services Description Language) definition that you create for your Magento Enterprise Edition API solution ism by default, WS-I compliant. This makes it possible to use tools that require a WS-I complaint WSDL definition for API integration. No additional settings are required. Use the following endpoint URL for all WSI-I APIs, and replace {site_url} with the store domain.

WS-I Endpoint URL

```
http://{site_url}/api/wsi_soap/?wsdl
```

To change the general settings:

By default, the API default character set is UTF-8, and the timeout for client sessions is 3600 seconds. You can change the default settings through the system configuration of the store.

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Services, select **Magento Core API**. Then, click to expand the **General Settings** section. Then, do the following:

Magento Core API General Settings

   a. Enter the name of the **Default Response Charset** that you want to use.
   b. Enter the length of the **Client Session Timeout** in seconds.
   c. To enable **WS-I Compliance**, select “Yes.”
   d. To enable the **WSDL Cache**, select “Yes.”
3. When complete, click the **Save Config** button.

Activating Web Services

Web Services give you the ability to grant permission to third-party applications to access your store data for the purpose of integration.

Step 1: Create a Web Service Role

1. On the Admin menu, select **System > Web Services > SOAP/XML-RPC Roles**.
2. Click the **Add New Role** button.
3. In the Role Information section, enter a **Role Name** such as "API."
4. In the panel on the left, select **Role Resources**. Then do one of the following:
   - To enable full access, set **Resource Access** to "All."
   - To provide limited access to data, set **Resource Access** to "Custom." Then, select the checkbox of each resource that is available to this role.
   - By default, when a area is selected, full access is granted. However, you can specify the actions that a person is allowed to take. Specific types of access are listed under many of the resource links, so it is easy to determine exactly what a user is allowed to do with the resource.
5. When complete, click the **Save Role** button.

Step 2: Create a Web Service User

1. On the Admin menu, select **Web Services > SOAP/XML-RPC-Users**.
2. Click the **Add New User** button.
3. Complete the following fields:
   - User Name
   - First Name
   - Last Name
   - Email
4. In the **API Key** field, type in a verification key, or password. This is the access credentials that third-party web services will use to access your Magento store.

Web Service User

5. To confirm, re-enter the key in the **API Key Confirmation** field.
6. In the panel on the left, select **User Role**. Then, select a role for the user.
7. When complete, click the **Save User** button.

Step 3: Add Custom Scripts to Your Store

Some third-party web services rely on snippets of JavaScript code to gather data. Some web services require you to insert code in the HTML <head> section, while others require the code to be in the HTML footer, below the closing </body> tag.

Chapter 75:

System Tools

The system toolsgive developers, system administrators, and support engineers easy access to routine system processes and reports.

Topics in this chapter:

- Backup
- Support Tools
- Compilation

Support Tools

The Support Tools are designed to identify known issues in your system. They can be used as a resource during the development and optimization processes, and as a diagnostic tool to help our support team more quickly identify and resolve issues.

The topics included in this section are:

- System Backups
- System Reports

System Backups

The Manage System Backups page lists all the available system backups. The backups can be filtered by status and date. The backup includes complete code and database dumps.

Generating a System Backup

To generate a system backup:

1. On the Admin menu, select **System > Tools > Support > System Backups**.
2. Click the **New Backup** button.

   Backups take some time to process. While the backup is processing, it will appear in the list with an “Incomplete” status.

System Reports

The system reporting tool gives you the ability take periodic full, or partial, snapshots of the system, and save them for future reference. You can compare performance settings before and after code development cycles, or changes to server settings. The system reporting tool can dramatically reduce the time spent preparing and submitting the information required by Support to begin an investigation.

From the Manage System Reports page, you can view and download existing reports, delete reports, and create new reports.

Manage System Reports

To access system reports:

1. On the Admin menu, select **Tools > Support > System Reports**.
2. To view a report, click the **View** link at the end of the row.
3. To download a report, click the **Download** link at the end of the row.
4. To create a new report, click the **New Report** button. Then, do the following:

a. In the list, select each report type that you want to include.

a. By default, all reports are selected.

Generate System Report

b. Click the **Create** button to generate the report.

It might take a few minutes for the report to generate, depending on the report types selected. When the report is ready, it appears at the top of the list with a timestamp and description of its contents.

New System Report

System Reports

Report Type	Information Included
General	Magento Version Data Count Cache Status Index Status Compiler Status
Data	Corrupted Categories Data Duplicate Categories By URL Key Duplicate Products By URL Key Duplicate Products By SKU Duplicate Orders By Increment ID Duplicate Users By Email
Environment	Environment Information MySQL Status
Modules	Custom Modules List Disabled Modules List All Modules List Core Modules List Enterprise Modules List
Configuration	Configuration Data from app/etc/enterprise.xml Data from app/etc/local.xml Data from app/etc/config.xml Shipping Methods Payment Methods Payments Functionality Matrix
Rewrites	Active Class Rewrites Class Rewrite Conflicts File Rewrites Controller Rewrites Router Rewrites
Files	Modified Core Files Applied Solutions List

Report Type	Information Included
	Patch Files List Missing Core Files New Files Files Permissions
DB Tables	Modified Core Tables Missing Core Tables New Tables Missing DB Routines List New DB Routines List Missing DB Triggers List New DB Triggers List DB Tables Status DB MyISAM Tables Status DB Routines List DB Triggers List
Logs	Log Files Top System Messages Today's Top System Messages Top Exception Messages Today's Top Exception Messages
Attributes	User Defined Eav Attributes New Eav Attributes Entity Types All Eav Attributes Category Eav Attributes Product Eav Attributes Customer Eav Attributes Customer Address Eav Attribute RMA Item Eav Attributes
Events	Custom Global Events Custom Admin Events All Global Events All Admin Events Core Global Events

Report Type	Information Included
	Core Admin Events Enterprise Global Events Enterprise Admin Events
Cron	Cron Schedules by status code Cron Schedules by job code Errors in Cron Schedules Queue Custom Global Cron Jobs Custom Configurable Cron Jobs Cron Schedules List All Global Cron Jobs All Configurable Cron Jobs Core Global Cron Jobs Core Configurable Cron Jobs Enterprise Global Cron Jobs Enterprise Configurable Cron Jobs
Design	Design Themes Config Adminhtml Themes List Frontend Themes List Install Themes List Adminhtml Skins List Frontend Skins List Install Skins List
Stores	Websites Tree Websites List Stores List Store Views List

Compilation

The compiler is disabled by default. The first time you run the compiler, the status changes to “Enabled.” A summary of the compilation state appears at the top, and includes the status of the compiler and state of the compilation, the number of files compiled, and the number of compiled scopes.

To run the compiler:

1. On the Admin menu, select **System > Tools > Compilation**.
2. Click the **Run Compilation Process** button.

To disable the compiler:

Click the **Disable** button.

Compilation Complete

Server Backups & Rollback

Magento Enterprise Edition gives you the ability to back up different parts of the system—such as the database, file system, or both—and to rollback automatically. Files are compressed using the .gz and .tgz formats.

Topics covered in this section include:

- Creating a Backup
- Rolling Back Changes

Best Practices

Restrict Access to Backup Tools

Access to the Backups and Rollback management tool can be restricted by configuring user permissions for backup and rollback resources. To restrict access, leave the corresponding checkbox unselected. If you need to grant access to the rollback resources, you must grant access to backup resources as well.

Backup Before Installing Extensions and Updates

Always perform a backup before installing an extension or updating Magento. Magento Connect Manager (MCM) includes a backup option that you can use before installing an extension or upgrading to a new release.

Creating a Backup

Database backup files are compressed using the .gz format. For the system backups and database and media backups, the .tgz format is used. Backup files are stored in the var/backups directory in your Magento file system. The files that are stored in the /var/cache, /var/log, /var/session and /var/report folders are excluded from the backup.

Create a Backup

To create a backup:

1. On the Admin menu, select **System > Tools > Backups**.
2. Click one of the following buttons, depending on the backup type you need to create:

System Backup	Creates a complete backup of the database and the file system. On the next step you will have the possibility to choose whether to include the media folder to the backup.
Database and Media Backup	Creates a backup of the database and the media folder.
Database Backup	Creates a backup of the database.

3. To put the store into maintenance mode during the backup, select the checkbox. After the backup is created, maintenance mode is turned off automatically.
4. If you are creating a system backup, select the **Include Media folder to System Backup** checkbox if you want to include the media folder. When prompted, confirm the action.

   Records of all created backups are listed on the Backups page. Deleting a record deletes the archive file as well.

To backup from Magento Connect Manager

1. On the Admin menu, select **System > Magento Connect > Magento Connect Manager**.
2. Select the **Create Backup** checkbox and select the backup type.

3. Proceed with an extension installation or Magento update. The backup is created automatically and available at **System > Tools > Backups**.

Rolling Back Changes

> **Important!** Use the Rollback with caution. Customers who are in the process of checking out when you start the rollback may not be able to complete the process.

To roll back the whole system or the database:

1. On the Admin menu, select **System > Tools > Backups**.
2. On the Backups page, find the backup you want. Then in the Action column, click the **Rollback** link.

   > All changes made since the backup was created are lost after the rollback.

3. Confirm the rollback. When prompted, enter your Admin **Password**. Then, choose whether you want to put your store into the maintenance mode during the roll back. When restoring file system or database and media files you can choose to use the FTP connection.

   After the rollback, you are redirected to the Admin login page.

4. Refresh all cache types and rebuild required indexes.

Notes

Appendix A:
Glossary

A

above the fold
The web page content that is immediately visible in the browser window; section of a page that is displayed without the need to scroll.

Admin
The password-protected back office of your store where orders, catalog, content, and configurations are managed.

alt text
The text that is displayed in place of an image when the user is unable to view the image.

anchor text
The visible text that is anchored to another page or page section; the literal text of a hyperlink.

API
Application Program Interface: A software interface that lets third-party applications read and write to a system using programming language constructs or statements.

aspect ratio
The proportional relationship between the width and height of an image.

attribute
A characteristic or property of a product; anything that describes a product. Examples of product attributes include color, size, weight, and price.

authorization
To give a service permission to perform certain actions or to access resources.

average inventory cost
Product price, less coupons or discounts, plus freight and applicable taxes. The average is determined by adding the beginning cost of inventory each month, plus the ending cost of inventory for the last month of the period.

B

B2B
Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

B2C
Business to Consumer: Business transactions between a business entity and a consumer.

banner
Promotional graphics displayed either horizontally on the top of a web page or vertically on the left or right margins. Website advertisements are often displayed as banners.

base currency
The primary form of currency used in store transactions.

base currency rate
The base currency rate is the default for your store.

batch processing
To perform a task or make a change to multiple items all at once, without manual repetition.

bounce rate
The percentage of visitors to your site that leave without viewing any other pages.

brand
A unique identity that defines a particular product or group of products.

breadcrumb
A navigation aid that helps the user to keep track of their location within your store.

brick and mortar
A retail business with a permanent physical location, as opposed to being entirely virtual.

broken link
A hyperlink that fails to send the user to its intended web page.

C

callout
Sometimes used to describe an XML block of page layout code.

canonical URL
The canonical meta tag redirects search engines to the correct URL, when seemingly duplicate content is encountered on the server.

capture
The process of converting the authorized amount into a billable transaction. Transactions cannot be captured until authorized, and authorizations cannot be captured until the goods or services have been shipped.

cardholder
A person who opens a credit card account and is authorized to make purchases.

cascading style sheet
The markup standard used to apply styles to HTML elements on the page.

category
A set of products that share particular characteristics or attributes.

CCV
Credit Card Verification code. (See CVV)

checkout process
The process of gathering the payment and shipping information that is necessary to complete the purchase of items in the shopping cart. In the final step, the customer reviews and places the order.

CMS
Content Management System: A software system that is used to create, edit, and maintain content on a website.

composite product
Any product type that offers customers a choice of options.

Content Delivery Network
A large distributed network of servers that specializes in the high performance delivery of multi-media content.

content marketing
The art of promoting products or services by providing valuable information at no charge.

conversion
A marketing term that indicates a goal has been reached. If the goal is to sell a product, conversion is reached when a visitor to your site becomes a buyer.

conversion rate
The percentage of visitors who are converted into buyers.

credit memo
A document issued by the merchant to a customer to write off an outstanding balance because of overcharge, rebate, or return of goods.

CSS
Cascading Style Sheets: A style sheet language that controls the appearance of HTML documents; a way to control the appearance of text, graphics, lists, links, and all other elements on a web page.

CSV
Comma Separated Values: A type of file used to store data values which are separated from each other by commas.

CVM
Card Verification Method: A way to verify the identity of the customer by confirming a 3-digit or 4-digit credit card security code with the payment processor.

CVV
The Card Verification Value, also known as the Card Security Code, provides an additional level of security for online transactions.

D

domain
The address of a website on the web; what the customer types in their browser address bar to access the store.

domestic shipment
A shipment where the sender and recipient are in the same country, and no international borders are crossed.

double opt-in
The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

dynamic content
A web page that displays different content depending on the user request.

Dynamic Media URL
A link to an image that contains a relative reference to the file location in media storage.

E

EAV
Entity Attribute Value

evergreen content
Content that has a long shelf life.

F

FAQ
Frequently Asked Questions.

favicon
Short for favorites icon; a 16x16 or 32x32 pixel icon associated with a website; is displayed in the browser address bar and next to the site name in a bookmark list.

feed reader
Software that is used to read syndicated content from RSS feeds.

FOB
Freight On Board: A shipping term indicating who is responsible for paying transportation charges.

frontend properties
Properties that determine the presentation and behavior of an attribute from the standpoint of the customer in your store.

fulfillment
The process of managing customer shipments.

G

gateway
A transaction bridge between a customer and a payment processing service that is used to transfer money between the customer and the merchant.

gross margin
The difference between the cost and price of a product.

H

handle
In programming, a name used to reference an object.

home page
The first home page a visitor sees when they access your website URL. Considered the most important page on your website according to search engine indexing.

HTML
HyperText Markup Language: A standard for tagging and structuring text, images, videos, and other media on a web page.

I

international shipment
A shipment where the sender and recipient are in different countries, and international borders are crossed.

invoice
A document that provides a detailed description of a purchase, including products purchased, quantity, price, shipping cost, sales tax, and total.

J

JavaScript
A scripting language used with HTML to produce dynamic effects and interactions on web pages.

jQuery

JQuery
A popular JavaScript library that is often used to create dynamic and responsive effects.

K

keyword
A term or phrase used in a search to filter for content that is of significant importance to that term or phrase.

L

LAMP
Linux / Apache / MySQL / PHP

landing page
A page on your site where a visitor arrives after clicking a link or advertisement.

layout
The visual and structural composition of a page.

layout update
A specific set of XML instructions that determines how the page is constructed.

link juice
The value and authority transferred from one web page to another via hyperlinks (or links). Link juice affects a website's page rank, a factor used to rank a search engine results page.

liquid layout
A flexible approach to web design that specifies the size and position of elements as percentages rather than as exact measurements in pixels.

load sequence
The order scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

locale
A set of configurations that defines the user's language, country, tax rate, and other settings.

login
The process of signing into an online account.

M

markdown
The amount subtracted from the original price of a product.

markup
A percentage added to the cost of an item to determine the retail price.

media storage
A dedicated space on the content delivery network for your store's assets.

merchant account
An account with a bank or financial institution that makes it possible to accept credit card transactions.

meta tags
Information in a web page that is not displayed on the page itself, but is used by search engines to determine the page title, description, and page keywords.

N

navigation
The primary group of web page links that a customer uses to navigate around the website; the navigation links to the most important categories or pages on an online store.

O

opt-in
The process by which a user consents to receiving emails from an online store.

P

packing slip
A document that is usually included in a shipped package that describes the contents. Packing slips do not include financial or account information.

path to purchase
The path a prospect follows that leads to a sale.

payment bridge
An application that helps merchants meet PCI- DSS requirements.

payment gateway
A service that charges your customers' credit cards and sends the funds to your merchant account, for deposit into your business bank account.

PCI
Payment Card Industry: Refers to debit and credit cards and their associated businesses.

privacy policy
A document that explains the merchant's policies for handling customer information.

purchase order (PO)
A written sales contract between a buyer and seller that describes the merchandise or service to be purchased from a vendor.

R

redirect
A method used to alert browsers and search engines that a page has been moved. 301 Redirect: Permanent change 302 Redirect: Temporary change

relative link
A hyperlink that includes only the address of the linked page that is relative to the linking page, rather than the full URL.

return policy
A document that explains the merchant's rules regarding the return of products by customers.

robots.txt
A file placed on a website that tells search engine crawlers which pages not to index.

RSS feed
Really Simple Syndication: A technology that creates web content syndication and allows web users to subscribe to product feeds, websites, and blogs.

S

SaaS
Software as a Service: A software delivery model where the vendor provides the software and hosting environment, and customers pay for the service by subscription or per use.

Sass/Compass
A CSS pre-compiler that provides organizable, reusable CSS.

security certificate
Information that is used by the SSL protocol to establish a secure connection.

SEO
Search Engine Optimization: The process of improving a website's search engine rankings in order to increase valued visitors.

SERP
Search Engine Results Page

settlement
Settlement occurs when the acquiring bank and the issuer exchange funds and the proceeds are deposited into the merchant account.

shipping carrier
A company that transports packages. Common carriers include UPS, FedEx, DHL, and USPS.

shopping cart
A grouping of products that the customer wishes to purchase at the end of their shopping session.

sidebar
The right or left column of a two-column page layout.

sitemap
A page that provides search engines with an efficient, alternate route through your site.

SKU
Stock Keeping Unit: A number or code assigned to a product to identify the product, options, price, and manufacturer.

splash page
A promotional page with a product or advertisement; normally displayed before the home page.

SSL certificate
A validation and security mechanism that identifies the merchant and encrypts credit card and other sensitive information.

static block
A fixed content block that can be displayed on various content pages in a store.

static content
Content that does not change frequently. See also dynamic content.

T

theme
A package that contains graphics and appearance information, and customizes the look and feel of the store.

transactional email
A notification email sent to the customer when a transaction is processed.

transactional emails
An automated email message that is sent in response to a specific event or transaction.

U

URL
Uniform Resource Locator: The unique address of a page on the internet.

usability
Refers to the degree to which a product or service is easy to use by its customers.

V

Visual merchandising
A term used in retail to describe the art and science of floorplan development and the multi-dimensional presentation of products.

W

widget
A prepared snippet of code that adds functionality and/or dynamic effects to your store.

WYSIWYG
What You See Is What You Get: An editor that displays formatted text as it will appear in its final published form.

X

XML
Extensible Markup Language: A markup format derived from SGML that it used to format information for publication and distribution.

Notes

Appendix B:

Editor Toolbar

Editor Toolbar

Editing Tools

Editing Tools

Undo

Redo

Cut

Copy

Paste

Paste as Plain Text

Paste from Word

Find

Find and Replace

Spellchecker (not installed)

Mark as Deletion

Mark as Insertion

Citation

Abbreviation

Acronym

Styles and Fonts

Styles and Fonts

Styles

Format

Font Family

Font Size

Character Format

Character Format

Bold

Italic

Underline

Strikeout

Subscript

Superscript

Special Characters

Special Characters

Insert Symbol

Insert Non-Breaking Space

Insert Page Break

Color

Color

Select Text Color

Select Background Color

Paragraph Format

Paragraph Format

Left Justify

Center

Right Justify

Full Justify

Outdent

Indent

Blockquote

Coding Tools

Coding Tools

Remove Formatting

Cleanup Messy Code

Lists

Lists

Bulleted (Unordered) List

Numbered (Ordered) List

Rules

Rules

Insert Simple Horizontal Rule

Insert Formatted Horizontal Rule

Links and Anchors

Links and Anchors

Insert/Edit Link

Remove Link

Insert/Edit Anchor

Images and Media

Images and Media

Insert/Edit Image

Insert Media

Tables

Tables

Insert/Modify Table

Table Row Properties

Table Cell Properties

Insert Row Above

Insert Row Below

Remove Column

Remove Row

Split Merged Table Cells

Merge Table Cells

Layers

Layers

Insert New Layer

Move Layer Forward

Move Layer Backward

Toggle Absolute Positioning

Variables, Attributes and Widgets

Variables, Attributes and Widgets

Insert Variable

Insert/Edit Attributes

Insert Widget

Workspace Preferences

Workspace Preferences

Toggle Fullscreen Mode

Display Visual Control Characters (On/Off)

Toggle Guidelines / Invisible Elements

Set Typing Direction Left-to-Right

Set Typing Direction Right-to-Left

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