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Magento Certified Solution Specialist Study Guide

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ECOMMERCE
STRATEGY



PLATFORM
DEVELOPMENT



UX
DESIGN



SYSTEMS
INTEGRATION



HOSTING &
INFRASTRUCTURE



SERVICES
& SUPPORT

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Purpose

The purpose of this document is to summarize and answer questions from the Magento Certified Solution Specialist Study Guide.

Content Area 1: eCommerce

- **What is the difference between Omni-Channel and Multi-Channel retailing?**
 - Multi Channel means providing different platform like web, mobile, etc. to facilitate the sale of products/item
 - Omni-Channel is a step above Multi-Channel. Omni-Channel dictates that we should provide same brand experience irrespective of channel/medium customer choose

- **How can you set up a product catalog for best search results, taking into account issues of duplicate content, meta content, meta title, keyword search terms in product description, attribute weight and so on?**
 - Duplicate content – ensure that each product will have a unique description and there is only a single path to the same product
 - Meta content – ensure that this is populated and crawlable
 - Meta title – again, make sure that this is populated
 - Keyword search terms – make sure that this information is populated and relevant
 - Attribute weight – when SOLR is used, make sure that the weights are accurately assigned and that the most relevant fields across the catalog have the greatest weight

- **What is a "*canonical link element*"?**
 - Used for SEO that will describe the 'proper' link that should be used
 - For example 'Show All' on a category listing page as opposed to the individual pages

- **What "*social merchandising*" techniques and tools are used in commerce?**
 - Original concept was the display of ratings, likes, comments and purchases from either a social network or a broader community
 - This can involve onsite ratings and reviews
 - Currently the trend is moving towards matching customer interests with product offering

- **When is SSL required when transacting data online?**
 - Secure Socket Layer – required as it will encrypt the data that is entered client side when transmitting to the application
 - It is required when the data is personal or private
- **What is PA-DSS? When should PA-DSS be applied?**
 - Payment Application Data Security Standard
 - PA-DSS was implemented in an effort to provide the definitive data standard for software vendors that develop payment applications
 - This should be applied on any site that is utilizing payment applications
- **What is the process for getting a site certified as PCI-compliant?**
 - Utilize a PCI scanning tool that will provide a report on the level of compliance. If there are any failures, they will need to be addressed and resolved before a rescan is to take place.
- **What are best practices for protecting commerce user data?**
 - Never store sensitive data onsite (CC or payment info) and for the data that is stored, ensure that information is encrypted where available and correct server security measures are in place to prevent access to this information.
- **What are the best usability practices when building an online catalog and checkout system?**
 - Always place yourself in the customers' shoes to design for their optimal experience. Make sure that products and information are easy to find and that the process to checkout is a streamlined experience with the least amount of barriers to conversion in place.

- **What are the main characteristics of Agile and Waterfall development methodologies?**
 - ***Waterfall***
 - Traditional methodology
 - Typically will be managed via a Gantt chart
 - Not flexible to change
 - Typically need to design and scope the entire project before beginning
 - ***Agile***
 - Sprint based delivery
 - Iterative development where priorities can shift each sprint
 - Provides flexibility to implement small changes to the product as it can be seen as an output to each sprint
 - Planning is still required!

- **What are SMART requirements?**
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-bound

Content Area 2: Magento Architecture

- **What are the unique advantages of Magento MVC architecture when building a site?**
 - Model View Controller
 - Used to keep the code modular and clean to assist in programming (keep things separate)
 - It divides a given software application into three interconnected parts, so as to separate internal representations of information from the ways that information is presented to or accepted from the user
 - The central component, the model, consists of application data, business rules, logic and functions
 - A view can be any output representation of information, such as a chart or a diagram
 - Multiple views of the same information are possible, such as a bar chart for management and a tabular view for accountants
 - The third part, the controller, accepts input and converts it to commands for the model or view

- **What are the two methods available in the Magento Admin (in the System section) to change the design of a site?**
 - System → Configuration → General → Design
 - Package
 - Themes

- **How can you change the layout of catalog pages using Magento Admin functionality?**
 - System → Configuration → Catalog → Catalog → Frontend
 - List Mode
 - System → Configuration → Catalog → Manage Categories
 - Custom Design

- **How is product data constructed in Magento (product attributes, inventory, price, images, etc.)?**
 - EAV structure so that there can be an ever-expanding structure of data
 - Elements of a product include:
 - Attributes
 - Categories
 - Inventory
 - Pricing
 - Images
 - Product Associations
 - Design
 - Website Associations
 - Product Reviews
 - Product Tags

- **When does product inventory change (decrease) during the ordering process?**
 - When the order is actually placed by the end user (pending/processing)

- **How can an administrator control the inventory change?**
 - Manage Stock Yes/No
 - System → Configuration → Catalog → Inventory → Stock Options
 - Decrease Stock When Order is Placed

- **What is RMA in Magento and what are the RMA types?**
 - Return Merchandise Authorization
 - Resolution
 - Exchange
 - Refund
 - Store Credit
 - Reason to Return
 - Wrong Color
 - Wrong Size
 - Out of Service

- **What are the required attributes for creating a CMS page using Magento Admin functionality?**
 - Page Title
 - URL Key
 - Store View
 - Status
 - Layout

- **What is the process for creating a product, and what catalog data is used in this process?**
 - Catalog → Manage Products → Add Product
 - Select the Product Type and Attribute Set
 - Based on the above set the appropriate attributes
 - Upload images
 - Enable the product and assign to the appropriate categories

- **How is the price defined for a product and what methods are available for changing product price using Magento Admin functionality?**
 - Price is defined within the Prices tab of a product
 - Can be set as the standard Price
 - Set a Special Price
 - Set a Group Price
 - Set a Tier Price
 - Configurable base plus Price
 - Custom Options
 - Catalog Price Rules
 - Shopping Cart Price Rules

- **What are main differences in Magento indexing between Magento Community Edition 1.8 and Enterprise Edition 1.13?**
 - Partial Indexes
 - Removed ability to manually re-index

- **What marketing and merchandising features are available only in Magento Enterprise Edition?**
 - Customer Segmentation
 - Dynamic Rule Based Product Relations
 - Persistent Shopping
 - Automated Email Marketing Reminder
 - Private Sales
 - Gift Registry
 - Gifting Options
 - Rewards Points
 - Store Credits
 - Multiple Wish Lists
- **What payment methods and payment functionality are available only in Magento Enterprise Edition?**
 - Payment Bridge
 - CoD

Content Area 3: Elements of a Magento Commerce Site

3.1 Catalog

- **What are the different product types in Magento Enterprise Edition?**
 - Simple
 - Configurable
 - Grouped
 - Bundle
 - Virtual
 - Downloadable
 - Gift Card

- **What are the minimum attributes to create a simple product?**
 - Name
 - Description
 - Short Description
 - SKU
 - Weight
 - Status
 - Visibility
 - Tax Class
 - Price
 - Qty (If Manage Stock = Yes)

- **What is the product “Attributes Set” used for in Magento? Can you have different product types using the same Attributes Set?**
 - An attribute set is a grouping of attributes that can be used as a template for similar products (for example there could be a set specific to electronics and one specific to clothing as there is not a lot of overlap)
 - Yes, can definitely have different product types using the same attribute set

- **What is the process of creating layered navigation (including category creation and attributes, product attribute types, and product-category associations)?**

- Create the category tree that will be used for the main navigation and potential drill down
 - Create the attributes and determine which will be used for reductive navigation (note that only dropdowns or multi-selects can be utilized)
 - Denote the attributes that will be used for reductive navigation (with or without results) from the Manage Attributes section of the admin
 - Assign the products to categories and the appropriate attribute values
- **What are the different ways in which an Admin user can update product inventory?**
 - Directly in the product record
 - Mass import updates
 - Creating an order in the admin
 - Creating a credit memo and returning to stock
 - Cancelling an order
- **How can you display associated products in the cart and on the product page?**
 - This can be accomplished by specifying one of the product relations (related, up-sell, cross-sell)
 - Can either be specific (in the product record) or rule-based (EE only)
- **How can you create page redirects for specific search requests?**
 - Navigate to Catalog → Search Terms
 - Edit or Add New Search Term
 - Choose the term and specify the page to redirect users to
- **Can a customer submit a JPG image with a product review?**
 - No
- **How can you display a telephone number in a page footer using Admin functionality?**
 - Specify the phone number for the store
 - Enable display in footer using the appropriate variable

- **Which Magento feature can be used to display different content (example: CMS banner) depending on customer playgroup?**
 - Customer Segmentation

3.2 Shopping Cart

- **How can you create a product discount to have it automatically added in the shopping cart?**
 - Shopping cart price rule
- **What are the different product or order price discount options available in the shopping cart in Magento Enterprise Edition?**
 - Percent of product price discount
 - Fixed amount discount
 - Fixed amount discount for whole cart
 - Buy X get Y free (discount amount is Y)
- **Can guest customers place orders?**
 - Dependent on if 'Guest Checkout' is selected as an option in the admin configuration
- **Can customers ship products to multiple different addresses using native Magento functionality?**
 - Yes
- **How can a customer register an account when placing an order?**
 - Option to 'Create an account' or 'Checkout as guest' as the first step in the checkout process
- **Can shopping cart products be shared among different websites?**
 - No, only one cart per site that is not shared

- **What are the different shopping cart promotion types, and how can shoppers apply them as discounts?**
 - Percent of product price discount
 - Fixed amount discount
 - Fixed amount discount for whole cart
 - Buy X get Y free (discount amount is Y)
 - Either automatically or via a coupon

- **How does the persistent shopping cart option work in Magento?**
 - When a user adds a product to their cart (even if not logged in) that session is cookie'd so if the user is to return those items will still appear in their cart as part of that session

- **Does Magento Enterprise Edition functionality allow merchants to contact shoppers about their abandoned shopping carts?**
 - See Reports → Shopping Cart and select Abandoned Carts
 - Can then export as CSV or contact with the email of the account if the user has submitted that information

3.3 Payment

- **What are the different payment types available in Magento EE v. 1.13?**
 - Simple Payment Method for Admin
 - PayPal Payment Solutions
 - Payment Bridge
 - Ogone Direct Link
 - PSi Gate
 - Sage Pay Direct
 - Saved CC
 - Zero Subtotal Checkout
 - Bank Transfer Payment
 - Cash On Delivery Payment
 - Check / Money Order
 - Purchase Order
 - Authorize.net Direct Post
 - Authorize.net
 - Braintree
 - Worldpay
 - First Data Global Gateway Web Service API
 - Paybox Direct
 - eWAY Direct
 - Cybersource (SOAP Toolkit)
 - Ogone
 - Payone Direct Debit
 - Payone.de
 - DIBS Payment Services

- **What is Magento Secure Payment Bridge?**
 - Magento Secure Payment Bridge assists merchants in meeting PCI standards with this Payment Application–Data Security Standards (PA-DSS) compliant payment application.
 - Implementing Secure Payment Bridge with Magento Enterprise saves online merchants money and time when it comes to complying with PCI DSS Standards

- **Does Magento save credit card numbers in the database when the Authorize.Net payment method is used?**
 - No, the token will be saved with the order – credit card numbers are never stored
- **For what product types can the Magento Recurring Profile be enabled?**
 - Subscription
 - Virtual
- **Where can the PayPal Express payment method be used on a Magento site (on which pages)?**
 - Cart
 - Checkout
- **What is the difference between the Authorize Only and Authorize and Capture payment actions?**
 - Authorize Only – will authorize the card and the capture only occurs when the order is invoiced (capture online selected)
 - Authorize and Capture – funds are captured immediately when the order is placed (illegal in most places unless a custom manufacture product)

3.4 Shipping (My Account, Wishlist)

- **Can a storefront customer select a delivery date when placing an order with the table rates shipping option?**
 - No
- **What shipping methods are available natively in Magento Enterprise Edition?**
 - Flat Rate
 - Table Rates
 - Free Shipping
 - UPS
 - USPS
 - FedEx
 - DHL

- **What shipping option attributes are available for a customer when placing an order?**
 - Single Shipment
 - Multi-Shipment
- **How is the shipping cost calculated for the DHL and table rates methods?**
 - Table Rates – used rates in table and lookup based on product information
 - DHL – live rate lookup (not on the weekend)
- **How can a customer account password be changed by a customer or an Admin user?**
 - Customer – My Account or Password Reset
 - Admin – in the Customer
- **Can customers share their wish lists with friends?**
 - Yes they can via email
- **Can a customer print an order invoice from the My Account section?**
 - Yes, My Account -> My Orders

3.5 Checkout (features, flow, taxes)

- **What product types do not require any shipping cost?**
 - Virtual
 - Downloadable
 - Gift Card
 - Subscription
- **Can a customer apply a coupon on the order review page?**
 - No they cannot, only in the Cart (native)
- **Is it possible to change product qty during checkout, on the order review page?**
 - Not during checkout, only in the Cart (but can be directed to the cart at the order review page)

- **What is a gift certificate, and how can it be used?**
 - A Magento Gift Certificate is a form of payment that can be applied to an order
 - This can only be applied on the Cart page before proceeding to checkout

3.6 Order Processing (order management, fulfillment, order statuses)

- **When an order is saved in the Magento database, what triggers a confirmation email to a customer who pays using PayPal Express? (Logging in to the PayPal account? Clicking the Checkout button? Clicking the Purchase button?)**
 - Clicking the Purchase button
- **When editing a pending order, what order data can be changed?**
 - Address and contact information
- **What are the different order statuses available in Magento and how can they be managed by a storeowner?**
 - Processed Ogone Payment
 - Processing
 - Pending Ogone
 - Pending Payment
 - Payment Review
 - Suspected Fraud
 - Pending
 - On Hold
 - Complete
 - Closed
 - Canceled
 - Declined Ogone
 - PayPal Canceled Reversal
 - Cancelled Ogone
 - Processing Ogone Payment
 - PayPal Reversed
 - Pending PayPal
 - Waiting Authorization
 - Can be managed via System -> Order Statuses

- **What are the different methods of creating an order in Magento: One Page Checkout, Multiple Addresses Checkout, Backend Create Order, Web Services API, Order Import, Other?**
 - One Page Checkout
 - Standard Checkout
 - Admin Order Create
 - Web Services API
 - Order Import
 - Reorder

- **Does Magento native logic allow for partial shipment or partial payment of an order, and if so, what are the conditions for using this functionality?**
 - Yes, only if an appropriate payment method is used that will allow for partial capture
 - Split shipments can usually be applied to any order, however the invoice would be for the complete order (depending on the payment method)

3.7 Cookies

- **How are cookies used in Magento?**
 - Tracking user preferences
 - Persistent cart
 - Search history

- **What customer's data is saved in cookies, and how is it used in the storefront using Magento native functionality?**
 - Items in cart
 - Some data that the user enters
 - Store selection (Store View, Store, Website)

3.8 Security

- **What are three major security features in native Magento EE v. 1.13?**
 - CSRF – Cross-Site Request Forgery (Form keys)
 - Secure payment bridge
 - PA-DDS Certification
- **What is the data encryption, hashing key management method used in Magento EE v. 1.13?**
 - SHA-256
 - AES-256

3.9 Extensions

- **Where can a merchant find Magento extensions?**
 - Some will be available directly on the developers' websites
 - Magento Connect is the best place to look
- **What are the two ways of installing an extension in Magento?**
 - The Connect Installer via the admin
 - Copying installation files directly to the server
- **How can a Magento Admin user disable an extension using Admin functionality?**
 - Disable Modules Output
 - System → Configuration → Advanced → Disable Modules Output

3.10 Customization

- **Does a layout change of a category page from one column to three columns require a customization?**
 - No, Catalog -> Categories -> Manage Categories -> Custom Design
 - Page Layout
- **Which of the following changes requires a code customization: Displaying a banner in the page content area, changing a footer link, changing a product page layout from one column to two columns?**
 - None

- **Does creating a product price attribute require a customization or can this be achieved using native Magento functionality?**
 - This can be accomplished via the Admin
- **Could you create a "How did you hear about us?" customer attribute to collect customer data during purchase and export it to a CSV file using Magento native functionality, or would that require a code customization?**
 - This would only be available to Magento EE installations

3.11 Customers (segments, groups)

- **How can customer groups be used in assigning discounts?**
 - Can select the Group(s) that the discount will apply to
 - Can create a specific Price for a specific Group
- **What are the differences between customer segments and customer groups?**
 - Groups can be used for pricing whereas Segments are used mainly for marketing
 - Groups are a 1:1 relationship whereas Segments can be 1:many
- **Using Magento Enterprise Edition native functionality, how could you display a personalized banner targeted to customers who match specific conditions?**
 - Create the appropriate Customer Segment based on Customer Attributes and then create the required Banner and set it to apply to the appropriate Customer Segments

3.12 Promotions and Pricing Rules

- **How can product attributes be used when creating shopping cart discounts?**
 - If the Attribute is given the property of 'Can be used in creating promotions' then a condition of that Attribute as it applies to Products can be defined to apply the desired pricing rule

- **How is shopping cart coupon code use tracked with Magento native logic?**
 - This code is stored with the order and if used is recorded against the counter for the specific Coupon Code (if there is a limit)
- **What are the three common methods of creating product price discounts?**
 - Direct – assigning a value to the Sale Price of the product
 - Shopping Cart Price Rule
 - Catalog Price Rule
- **How could you create a product price discount and display a related "on sale" banner on listing pages using Magento Enterprise Edition functionality?**
 - Create the Product Price Discount Rule
 - Create the required Banner
 - Assign the Related Promotion to the Banner

3.13 Import/export (of customers, orders, products)

- **What customer and product data can be imported and exported using Magento native logic?**
 - All customer data and customer attributes
 - Contact information
 - Addresses
 - Custom attributes
 - All product data
 - Attributes
 - Pricing
 - Inventory
 - Note that product relations cannot be exported

- **What is the process of creating a product in Magento using product import functionality?**
 - Create all desired attributes and if appropriate, attribute values
 - Export the current product sheet
 - Update the sheet to add the desired products
 - Reimport the sheet
 - Alternatively, can use data flow profiles

- **What product types can be created in Magento Enterprise Edition v. 1.13 using product import functionality?**
 - Simple
 - Virtual
 - Downloadable

- **Can you add an image to a product using Magento product import functionality?**
 - Yes, FTP or webserver location

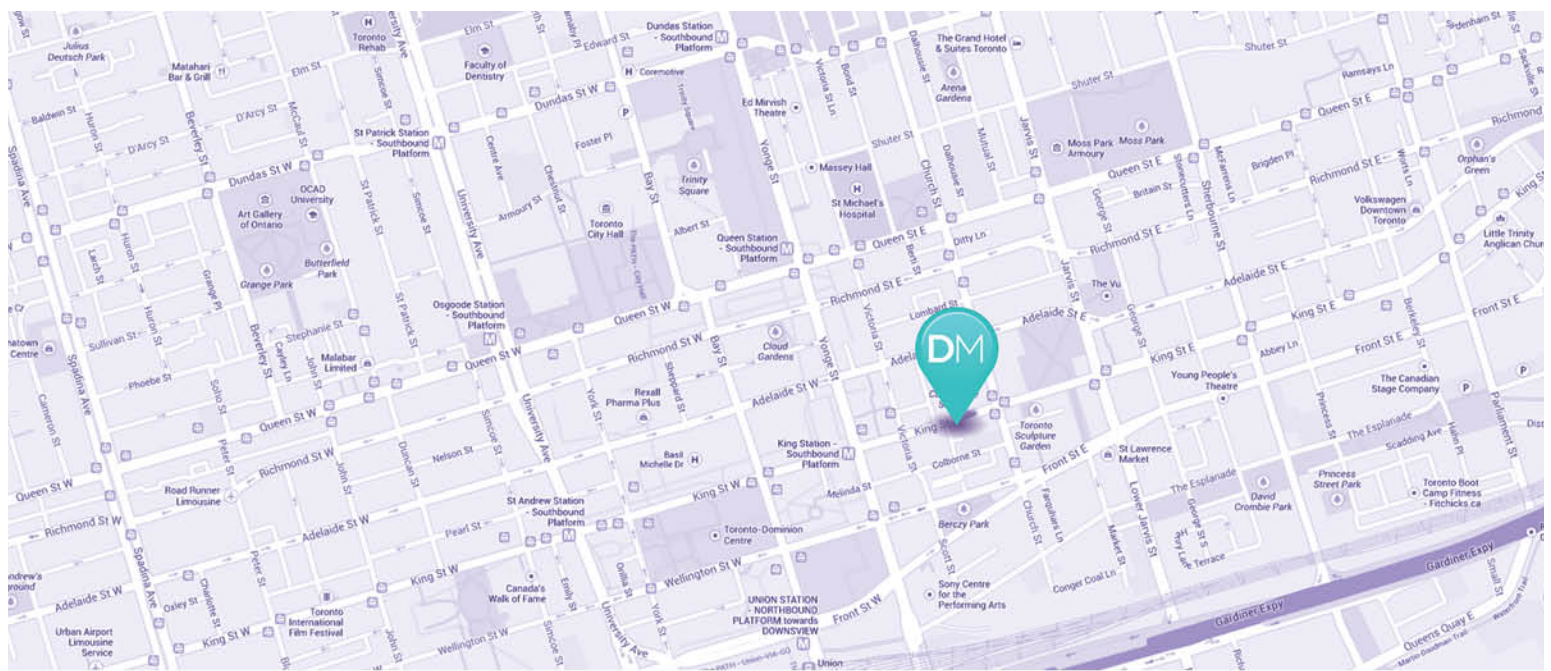
Content Area 4: Application of Knowledge to Business Goals

- **A customer wants to display a CMS block on category pages. What would be the most efficient way to implement that?**
 - Specify the 'Static Block' to be used for the category
 - Select to display 'Products and Static Block'

- **Given a merchant's need to have a Magento Enterprise Edition deployment certified against PCI standards, what payment methods would you recommend as the easiest technical solution to satisfy PCI requirements?**
 - Ensure to use an external gateway – preferred one already built into Magento
 - Utilize one of the following options:
 - PayPal Payment Solutions
 - Payment Bridge
 - Ogone Direct Link
 - PSi Gate
 - Sage Pay Direct
 - Authorize.net
 - Braintree
 - Worldpay
 - First Data Global Gateway Web Service API
 - Paybox Direct
 - eWAY Direct
 - Cybersource (SOAP Toolkit)
 - Ogone
 - Payone Direct Debit
 - Payone.de
 - DIBS Payment Services

- **A customer wants the ability to preview product information pages in the production environment before making them live. What Magento Enterprise Edition module would you recommend to satisfy this need?**
 - Content Staging
 - [View Video Here](#)

- **A merchant uses a Magento system, along with other online interfaces, as part of a multichannel business, and the merchant uses a business intelligence application to aggregate data from all these systems. What native features would allow the merchant to integrate Magento with this application?**
 - Data Flow Profiles to schedule import and export of data



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