



Get your web store up and running on the platform for growth

The official Magento user guide by Varien, the Magento Company



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About This Guide

Welcome to the Magento User Guide, which provides an overview of the Magento eCommerce platform developed by Varien, the Magento Company.

This guide is intended for web storeowners and first-time users of Magento. It provides a quick guide through the most important steps for getting your web store up and running and ready for selling online. The options described in this user guide enable you to generate a feature-rich and attractive eCommerce interface without the need for advanced technical expertise.

This guide first introduces Magento and its key concepts (*Chapter 1, Introducing Magento*, page 11). It then introduces the daily experience that a customer can have in a Magento web store (*Chapter 2, Introducing the Frontend*, page 15) and the daily management tasks that a storeowner would perform (*Chapter 3, Introducing the Backend*, page 40). *Chapter 4, Getting Started with Magento*, page 50, describes how to install Magento.

The rest of the chapters that follow walk you through the process of setting up your Magento web store, customizing its behavior to your requirements, entering products, managing Orders, Invoices and Shipments and achieving the best turnover and profits from your web store.

The guide includes the following chapters:

- **Chapter 1, Introducing Magento**, page 11, introduces Magento and describes its basic components and the workflow for using it.
- **Chapter 2, Introducing the Frontend**, page 15, describes the basic browsing and purchasing features provided for your customers by a web store created using Magento.
- **Chapter 3, Introducing the Backend**, page 40, describes the ongoing management tasks that you can perform in the backend while running your Magento web store on a day-to-day basis.
- **Chapter 4, Getting Started with Magento**, page 50, describes Magento system requirements and how to install and configure it.
- **Chapter 5, Setting Up Your Catalog**, page 69, describes how to create a catalog for your Magento web store, how to add products and how to define Attributes for them.

- **Chapter 6, Preparing to Sell**, page 121, describes how to prepare your web store to start selling products by defining tax charges and how products are shipped and funds accepted.
- **Chapter 7, Design and Content**, page 139, describes how to customize the look-and-feel of your web store by applying easy to use options that are provided in the Magento backend.
- **Chapter 8, Promotions**, page 149, describes a variety of ways to promote your products.
- **Chapter 9, Managing Orders and Customers**, page 175, describes how to manage customers and Orders from the backend.
- **Chapter 10, Managing Customer Generated Content**, page 185, describes how to manage customer generated content, such as ratings, reviews, tags and polls.
- **Chapter 11, Monitoring and Improving the Web Store**, page 197, describes how to monitor and improve your store by defining reports, search terms, synonyms, redirects and Google Analytics.
- **Chapter 12, Keeping Your Store Healthy**, page 204, describes how to keep your store healthy by using a staging environment, updating Magento and extending Magento
- **Chapter 13, Getting Help**, page 210, describes Varien's resources for providing you with help.
- **Index**, page 214

Support and Contacting Information

We at Varien are dedicated to providing our customers with the best possible service. We would love to hear from you.

For feedback on this book and all other inquiries, please use our contact form at:
<http://www.magentocommerce.com/company/contact-us/>



Tip: If you are having any difficulty during the installation process, Varien offers professional installation services at <http://www.magentocommerce.com/store/professional-magento-installation>.



Tip: If you require a guaranteed response time, Varien offers support agreements at <http://www.magentocommerce.com/support/>. This web page also offers consulting services to help you with any task that is not covered by support.

Conventions Used in this Guide

Note: This is a note.



Tip: This is a tip providing useful suggestions and information.

1 Introducing Magento

This chapter introduces Magento, describes its basic components and the workflow for using it. This chapter contains the following sections:

- **What is Magento?**, page 11
- **Magento License**, page 11
- **Magento Frontend and Backend**, page 12
- **Advanced Magento Customization Options**, page 14

What is Magento?

Magento is a feature-rich eCommerce platform built on open-source technology that provides online merchants with unprecedented flexibility and control over the look, content and functionality of their eCommerce store. Magento's intuitive administration interface features powerful marketing, search engine optimization and catalog-management tools to give merchants the power to create sites that are tailored to their unique business needs. Designed to be completely scalable and backed by Varien's support network, Magento offers companies the ultimate eCommerce solution.

Magento License

Magento is licensed under the Open Software License (OSL) v3.0, an open source certified license. More information about Magento's license can be found at <http://www.magentocommerce.com/license/>

Magento Frontend and Backend

The following shows the two visible interfaces of Magento.

Frontend (The Web Store Front)

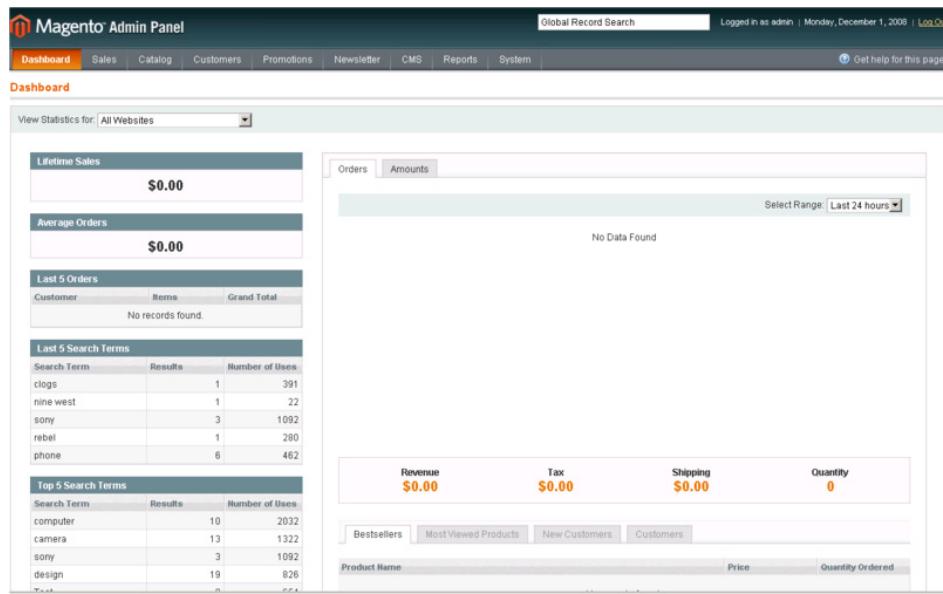
The frontend is the public view of your web store with which your customers can interact through a standard web browser. It presents your products, product Categories and promotions and provides your customers with ordering, payment and purchase tracking features.

An example is shown below:

The screenshot shows the Magento Demo Store homepage with a dark blue header. The header includes a search bar, a 'Default welcome msg!' message, and links for 'My Account', 'My Wishlist', 'My Cart', 'Checkout', and 'Log In'. A language selector shows 'Your Language: English'. Below the header, there are navigation links for 'Furniture', 'Electronics', and 'Apparel'. The main content area features several promotional banners: one for 'Anashria' with a 20% off offer; another for an 'end of summer SALE!' starting September 1st, offering 20% off Electronics, 15% off Men's Shoes, and 10% off Appliances; a 'FREE SHIPPING' offer for orders over \$50; and a 'Best Selling Products' section featuring a Sony VAIO laptop and a Nine West Lucero Pump. On the right side, there are three boxes: 'MY CART' (empty), 'COMPARE PRODUCTS' (empty), and a 'BACK TO SCHOOL' offer for school items. At the bottom right is a 'COMMUNITY POLL' asking 'What is your favorite Magento feature?' with options for 'Layered Navigation' and 'Price Rules'.

Backend (The Back Office)

The backend is the password-protected view of the back office features that enable a web store administrator to setup the products and purchasing options and to manage Orders and all other store functionalities. A view of the backend is shown below.



The screenshot shows the Magento Admin Panel Dashboard. At the top, there's a navigation bar with links for Global Record Search, Logout, and Get help for this page. Below the navigation is a header bar with tabs for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System. The main content area is titled "Dashboard". It includes several widgets:

- Lifetime Sales:** \$0.00
- Average Orders:** \$0.00
- Last 5 Orders:** A table showing no records found.
- Last 5 Search Terms:**

Search Term	Results	Number of Uses
clogs	1	381
nine west	1	22
sony	3	1092
rebel	1	280
phone	6	462
- Top 5 Search Terms:**

Search Term	Results	Number of Uses
computer	10	2032
camera	13	1322
sony	3	1092
design	19	826
...	n	...
- Orders:** A section showing "No Data Found" with a dropdown menu for "Select Range: Last 24 hours".
- Amounts:** A summary table with columns for Revenue (\$0.00), Tax (\$0.00), Shipping (\$0.00), and Quantity (0).
- Customer Navigation:** Buttons for Bestsellers, Most Viewed Products, New Customers, and Customers.
- Product Navigation:** Buttons for Product Name, Price, and Quantity Ordered.

Advanced Magento Customization Options

The options described in this user guide can get you up and running with an extremely feature-rich and attractive interface without the need for technical expertise.

If you would like to take your web store one step further, Magento provides a variety of advanced options for customizing the look-and-feel and functionality of your site. These include:

- Multiple Websites
- Multiple Web Stores
- Multiple Web Store Views
- Multiple Languages
- Custom Themes and Skins
- Extension Modules

You may refer to <http://www.magentocommerce.com> for a description of these options, as well as for access to resources that can assist you with their implementation.

2 Introducing the Frontend

In order to familiarize you with the features of the frontend, this chapter describes the basic browsing and purchasing features provided for your customers by a web store created using Magento. This chapter contains the following sections:

- **Overview**, page 15
- **Finding the Right Products**, page 16
- **Promotional Information**, page 25
- **Web Store Page Header and Footer**, page 31
- **Purchasing Functionality**, page 33
- **Managing Customer Relations**, page 37

Overview

The frontend provides the view of your web store that is publicly available on the Internet to customers using the Internet. The frontend shows your product catalog and provides your customers with ordering, payment and tracking features.

You can access the Magento demo web stores by navigating to <http://www.magentocommerce.com/demo>. The Single Store Demo is a sample Magento store that uses Magento's default theme and Sample Data. This sample store is referenced throughout this user guide.

You can access your own store by browsing to the address that you define for it during installation.

The following shows the first page of a default Magento Store with Sample Data:

The screenshot displays the homepage of a Magento store named "Magento Demo Store". At the top, there's a search bar with the placeholder "Search entire store here..." and a "Search" button. Below the search bar, a "Default welcome msg!" message is visible. The top navigation menu includes links for "My Account", "My Wishlist", "My Cart", "Checkout", and "Log In". A language selection dropdown shows "Your Language: English".

The main content area features several promotional banners:

- A banner for "Anashria" featuring a person's feet wearing sandals.
- A banner for the "Magento end of summer SALE!!" starting September 1st, offering discounts on Electronics, Men's Shoes, and Appliances.
- A banner for "FREE SHIPPING on orders over \$50.".
- A "Best Selling Products" section displaying items like a Sony VAIO VGN-TX270u/B 11.1" Notebook PC, Nine West Women's Lucifer Pump, and an Olympus Stylus 730 7 MP Digital Camera.
- A "POPULAR TAGS" section listing terms such as "Camera", "Honda", "SEXY", "Test", "asus", "Dell", "cool", "apple", "laptop", "casio", "shoes", "fit", "leather", "modern", "new", "notebook", "phone", "red", "tan", "youths".
- A "MY CART" section indicating "You have no items in your shopping cart."
- A "COMPARE PRODUCTS" section indicating "You have no items to compare."
- A "BACK TO SCHOOL" section with a message: "Keep your eyes open for our special Back to School items and save BIG!".
- A "COMMUNITY POLL" section asking "What is your favorite Magento feature?" with options for "Layered Navigation", "Price Rules", "Category Management", and "Compare Products".

At the bottom of the page, there's a footer with links to "About Us", "Customer Service", "Site Map", "Search Terms", "Advanced Search", and "Contact Us". It also includes a link to "Help Us to Keep Magento Healthy - Report All Bugs (ver. 1.2.1)" and a copyright notice: "© 2008 Magento Demo Store. All Rights Reserved."

Finding the Right Products

The Magento frontend is also referred to in this guide as your *web store*. It provides a variety of options for browsing through the products offered and then drilling down to view detailed information about each product, as described below. Magento enables you to define the default appearance of how multiple products are presented, such as whether they are shown as a list or grid (table), their sort order and the filter that is used.

Categories

The products in the web store are grouped into Categories, which are offered in a bar near the top of the web store page. Each product can be assigned to one or more Categories.

The Magento Demo Store provides five such Categories: **Furniture**, **Electronics**, **Apparel**, **Music** and **Ebooks**. **Music** and **Ebooks** show downloadable product functionality. Categories may have been assigned Sub-Categories. A customer can navigate to a Sub-Category using a Category's dropdown menu. The following shows the Sub-Categories: **Cell Phones**, **Cameras** and **Computers**:



A Category or a Sub-Category can each have a product list or show a landing page that features some products. The following shows a Category that has products:

A screenshot of the Apparel category page in the Magento Demo Store. The left sidebar contains shopping options for Category (Shirts, Shoes, Hoodies), Price (\$0.00 - \$100.00, \$100.00 - \$200.00), Color (Black, Blue, Brown, Gray, Green, Red, White), Manufacturer (Anashria, Asics, CN Clogs, Ecco, Kenneth Cole, Nine West, Steve Madden), and Shoe Type (Dress, Golf Shoes, High Heels, Running, Sandal, Tennis). The main content area shows apparel products: 'The Get Up Kids: Band Camp Pullover Hoodie' (green, \$30.00), 'Zoolf The Rock And Roll Destroyer: LOL Cat T-shirt' (red, \$13.50), and 'The Only Children: Paisley T-Shirt' (black, \$100.00). Each product has a star rating, price, and 'Add to Cart', 'Add to Wishlist', and 'Add to Compare' buttons. The right sidebar includes sections for 'MY CART' (empty), 'COMPARE PRODUCTS' (empty), a 'BACK TO SCHOOL' promotion, and a 'COMMUNITY POLL' asking 'What is your favorite Magento feature?' with options for Layered Navigation, Price Rules, Category Management, and Compare Products. A 'Vote' button is also present.

Filtering the Display of Products

Typically, the first step of a customer when browsing through the web store may be to select the Category or Sub-Category of the products of interest. The customer can then filter the products in that Category according to the various Attributes of these products.

The **SHOP BY** area on the left side of the frontend page provides a variety of product Attributes that can be used to access the products in that Category. The Attributes in a Category appear in groups, each with its own title. In the frontend page shown above, the groups that appear are **PRICE** (which shows ranges of prices), **COLOR**, **MANUFACTURER** and **SHOE TYPE**. Next to each Attribute is the number of products that have that Attribute.

For example: The Apparel Category has three green products, as shown below:



After a customer clicks on the **Green** Attribute, all the green products are displayed in the web store for browsing and the **SHOP BY** area indicates that the products in this Category have been filtered by the **Color: Green** Attribute, as shown below:

The screenshot shows a Magento storefront for apparel. On the left, a sidebar titled 'SHOP BY' displays filters for 'COLOR: Green' (with a clear icon) and 'PRICE' (\$10.00 - \$20.00 (2), \$30.00 - \$40.00 (1)). Below the sidebar is a 'Did you know?' section featuring a dog at a laptop. To the right is a main content area for 'Apparel' with a promotional banner for 'Come see what's cracking at Magento'. The main content area shows a grid of three products: 'The Get Up Kids: Band Camp Pullover Hoodie' (green, \$30.00), 'Coalesce: Functioning On Impatience T-Shirt' (green, \$15.00), and 'Zoof The Rock And Roll Destroyer: LOL Cat T-shirt' (red, \$13.50). Each product has a star rating and an 'Add to Cart' button. To the right of the products are several sidebar modules: 'MY CART' (empty), 'COMPARE PRODUCTS' (empty), 'RECENTLY VIEWED PRODUCTS' (empty), 'BACK TO SCHOOL' (ad for school items), and 'COMMUNITY POLL' (question about favorite Magento feature with four options: Layered Navigation, Price Rules, Category Management, Compare Products, and a 'Vote' button).

To clear the filter and thus redisplay all the products in the currently selected Category, click the icon next to the filter or the **Clear All Items** option.

Note: The third product is shown because it contains two variants inside: a green and a red version.

Popular Tags

Another option that Magento provides to help customers find the right product is called Popular Tags. Popular Tags provide another property that can be assigned to products that customers can select in order to view the products to which this tag has been assigned.

The screenshot shows a 'POPULAR TAGS' section. It lists several tags in a grid format: 'Camera Hohoho SEXY Test', 'apple bones cool cool t-shirt crap', 'good green hip laptop modern nice', and 'notebook phone red tight young'. Below the grid is a 'View All Tags' link.

Popular tags can be assigned by Customers in the product page, as follows, and can be approved and edited from the backend, if required:

Product Tags

Other people marked this product with these tags:

[cloes \(1\)](#) | [shoes \(1\)](#) | [tag \(1\)](#) | [sandals \(1\)](#) | [blue \(1\)](#) | [shoes \(1\)](#) | [small \(1\)](#) | [badassness \(1\)](#) | [holes \(1\)](#) | [blue \(1\)](#) | [beach \(1\)](#)

Add Your Tags:

[Add Tags](#)

Use spaces to separate tags. Use single quotes ('') for phrases.

Searching

The top right of your web store page provides a search field in which a customer can type all or part of the name of a product, or its Attributes, in order to find it, as shown below:



Comparing Products

Magento enables customers to compare the products of their choice, as follows:

- 1 A customer first clicks the **Add to Compare** option provided for each product that he/she wants to compare, as shown below:



[The Only Children:
Paisley T-Shirt](#)

\$100.00

[As low as: \\$70.00](#)

Add to Cart

[Add to Wishlist](#)

[Add to Compare](#)

- 2 After selecting all the products to be compared, the customer then clicks the **Compare Items** button in the **COMPARE PRODUCTS** area, as shown below:



The following page is then displayed in a pop-up window:

Compare Products

[Print This Page](#)

The Get Up Kids: Band Camp Pullover Hoodie ★★★½ ★ (2) \$30.00 Add to Cart Add to My Wishlist	The Only Children: Paisley T-Shirt \$100.00 As low as: \$70.00 Add to Cart Add to My Wishlist	
Model	The Get Up Kids: Band Camp Pullover Hoodie	
SKU	4fasd5f5	
Short Description	Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies.	
Description	Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies. Sizing info is available here . <ul style="list-style-type: none">• 6.1 oz. 100% preshrunk heavyweight cotton• Double-needle sleeves and bottom hem	
Color	Green	
	\$30.00 Add to Cart Add to Wishlist	\$100.00 As low as: \$70.00 Add to Cart Add to Wishlist

[Close Window](#)

Note: A row also appears for each comparable Attribute defined for these products, such as Color. You may refer to the **Managing Product Attributes** section on page 81 for more information about defining Attributes.

Sorting Products

A customer can sort the products that are displayed by selecting the relevant option in the **Sort by** field, as shown below:

View as: Grid [List](#)

Sort by [Name](#)  

		
Anashria Womens Premier Leather Sandal  (4) \$41.95 Add to Cart Add to Wishlist Add to Compare	ASICS® Men's GEL-Kayano® XII \$134.99 Add to Cart Add to Wishlist Add to Compare	CN Clogs Beach/Garden Clog  (3) \$15.99 Add to Cart Add to Wishlist Add to Compare

Grid/List View

Products can be displayed in a grid (table), as shown in the previous page or as a list, as shown below:

[View as: Grid](#) [List](#)  Sort by 



[Anashria Womens Premier Leather Sandal](#)


[4 Review\(s\)](#) [Add Your Review](#)

\$41.95 [Add to Cart](#)

Buckle embellished contrasting straps adorn both the heel and canvas covered wedge of this t-strap sandal to make it a truly unique addition to your wardrobe [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)



[ASICS® Men's GEL-Kayano® XII](#)

\$134.99 [Add to Cart](#)

The ASICS® GEL-Kayano® XII running shoe delivers the ultimate blend of cushioning and support. [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

Recently Viewed

The **RECENTLY VIEWED PRODUCTS** area lists the products recently viewed by the customer, whether they were purchased or not, and enables him/her to easily link back to them.

 RECENTLY VIEWED PRODUCTS

[CN Clogs Beach/Garden Clog](#)

[Anashria Womens Premier Leather Sandal](#)

[Zolof The Rock And Roll Destroyer: LOL Cat T-shirt](#)

Promotional Information

Magento provides a variety of aspects of product presentation that you can control and that enable you to promote and up-sell products to your customers.

Product List Banners

You can define the banner that appears at the top of each category landing page with a static block. This adds a graphical element to your Category pages that can be used for special promotions, or to highlight certain products. Banners can be defined per Category. More information about how to create and add static blocks on your site can be found in the *Managing CMS Pages* section on page 144.



Promotional Pages

Another way of featuring products and promotions in your web store is a customized category landing page, which is a static HTML page that may be displayed while browsing a Category, instead of showing a list of products, as shown below:

The screenshot shows a category landing page for 'Electronics'. The top navigation bar includes links for Home, Electronics, and Account. The main content area is divided into three columns: 'Cell Phones', 'Digital Cameras', and 'Laptops'.
Cell Phones Column: Headline: 'Don't ever lose touch with your loved ones.' Subtext: 'Use our phones. Love it, cherish it, keep it by your bed side, cause you need it.' A woman is shown taking a selfie. 'OUR BEST SELLING BRANDS' list: Samsung, Sony, Nokia, AT&T. A promotional box for 'BLACKBERRY 8100 PEARL' with 'NOW \$349.99' is overlaid on a blackberry phone image.
Digital Cameras Column: Headline: 'Memories fade, but photos are forever.' Subtext: 'Capture your memories with our quality digital cameras.' An image of a digital camera. 'OUR BEST SELLING BRANDS' list: Olympus, Kodak, Argus, Canon. A background image shows a person jumping over a window frame.
Laptops Column: Headline: 'Isn't it time you got quality for your buck?' Subtext: 'With Magento, you can.' An image of a laptop with a cloud icon. 'OUR BEST SELLING BRANDS' list: Acer, Sony, Apple, Toshiba. A promotional box for 'FREE SHIPPING on orders over \$50'. A 'BACK TO SCHOOL' section shows two laptops: 'Get your Acer Ferrari 3200 Now!' and 'Toshiba M285-E 14"'.
The overall layout is clean with a white background and a grid-like structure for the columns.

Up-sell Products

Up-sell products are items that your customer could buy *instead* of the product that is being viewed. These products may be of a better quality, more expensive, be more popular or produce a higher profit margin.

This example presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.

Microsoft Natural Ergonomic Keyboard 4000
[Be the first to review this product](#)

Availability: In stock.

\$99.99

Qty: [Add to Cart](#) OR [Add to Wishlist](#) [Add to Compare](#)

Quick Overview
The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard.

Double click on above image to view full picture

(-) (+)

Product Description

The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such as left and right, equal sign and back space placed just above the number pad. Easy-access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!

You may also be interested in the following product(s)

 Logitech diNovo Edge Keyboard \$239.99	 Computer From: \$447.98 To: \$4,477.92	 Gaming Computer From: \$4,999.95 To: \$6,348.95	
--	---	---	--

Related Products

Related products are meant to be purchased **in addition** to the item the customer is viewing. Related products are shown in the right column of your web store in a separate block. The following example shows a mouse promoted as a Related Product when a keyboard is being purchased or viewed.

RELATED PRODUCTS

Check items to add to the cart
or [select all](#)

<input type="checkbox"/>		BlackBerry 8100 Pearl	\$349.99	Add to Wishlist
<input type="checkbox"/>		Sony Ericsson W810i	\$399.99	Add to Wishlist
<input type="checkbox"/>		AT&T 8525 PDA	\$199.99	Add to Wishlist

Cross-sell Products

Cross-sell products appear next to the shopping cart. When a customer navigates to the shopping cart page (whether automatically after adding a product or otherwise), these products are displayed as cross-sells to the items already in the shopping cart. They are similar to **impulse buys**, like magazines and candy at the cash registers in grocery stores.

Based on your selection, you may be interested in the following items:

	19" Widescreen Flat-Panel LCD Monitor	\$399.99	Add to Cart
			Add to Wishlist
			Add to Compare

Product Pages

The backend enables you to define the type of information and functionality that is provided in a product's page. The following shows a typical product page:

Home / Apparel / The Get Up Kids: Band Camp Pullover Hoodie



The Get Up Kids: Band Camp Pullover Hoodie
★★★★★ 2 Review(s) | Add Your Review

Availability: In stock.

\$30.00

Qty: Add to Cart OR [Add to Wishlist](#) [Add to Compare](#)

Quick Overview
Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies.

Double click on above image to view full picture
(-) (+)
[MORE VIEWS](#)



Product Description
Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies. Sizing info is available [here](#).

Additional Information
Model The Get Up Kids: Band Camp Pullover Hoodie

You may also be interested in the following product(s)

 Apple MacBook Pro MA464LL/A 15.4" Notebook PC \$2,299.99 ★★★★★ 3 Review(s) Add Your Review	 Akio Dresser \$399.99 ★★★★★ 3 Review(s) Add Your Review
--	--

Product Tags
Other people marked this product with these tags:
[cool](#) (1) | [nice](#) (1) | [green](#) (1) | [sexy](#) (1) | [warm](#) (1)

Add Your Tags:
 [Add Tags](#)
Use spaces to separate tags. Use single quotes ('') for phrases.

MY CART
You have no items in your shopping cart.

COMPARE PRODUCTS
You have no items to compare.

RECENTLY VIEWED PRODUCTS
[BlackBerry 8100 Pearl](#)
[Gaming Computer](#)
[Computer](#)
[Microsoft Wireless Optical Mouse \\$500](#)
[Logitech diNovo Edge Keyboard](#)

RECENTLY COMPARED PRODUCTS
[The Only Children: Paisley T-Shirt](#)

BACK TO SCHOOL
Keep your eyes open for our special Back to School items and save BIG!

COMMUNITY POLL
What is your favorite Magento feature?
 Layered Navigation
 Price Rules
 Category Management
 Compare Products
[Vote](#)

Most of the features provided to present a product in your web store are self-explanatory. The following describes a few of these features:

- **Image:** The customer can use the slider to zoom in and out of the image, click on it to enlarge it, or pan it to see different parts of it.
- **Description:** The top of the page shows a short description, in the **Quick Overview** area and lower down you can see a more detailed **Product Description** area. Also, **Additional Information** details are provided about the product in the form of a table.
- **Product Tags:** Shows the tags assigned to this product. Customers can navigate to other products by clicking on one of these tags. You can also define whether customers can add tags.
- **Reviews:** Your customers can rate and review your products. The store administrator can approve or remove reviews.
- **Product Options:** Magento provides a variety of controls that enable you to configure the product options that appear for a Customer to select, such as checkboxes, dropdown menus and so on. For example, customers are able to select the size of a shoe, as follows:

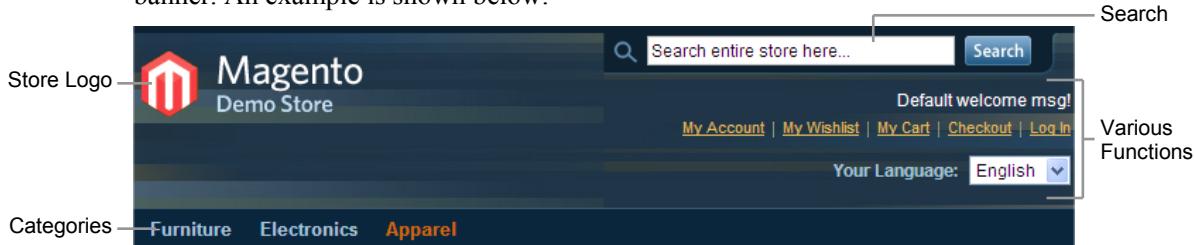
The screenshot shows a product configuration section. At the top, there is a dropdown menu labeled "Gender *". Below it, another dropdown menu is open, labeled "Shoe Size *". The options in this dropdown are: "Choose option...", "8", "9", "10 +\$1.00" (which is highlighted with a blue selection bar), "11 +\$2.00", and "\$12 +\$3.00". At the bottom of the configuration area, there is a "Qty:" input field followed by an "Add to Cart" button.

Web Store Page Header and Footer

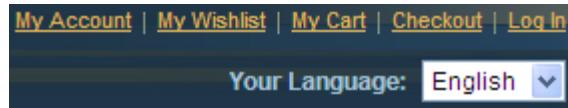
Every web store has a header that appears at the top of each page and a footer that appears at the bottom of each page. These features enable you to control the look-and-feel of your web store and provide the customer with various functions, as follows.

The Header

The default header of each of your web store pages shows your web store logo and banner. An example is shown below:



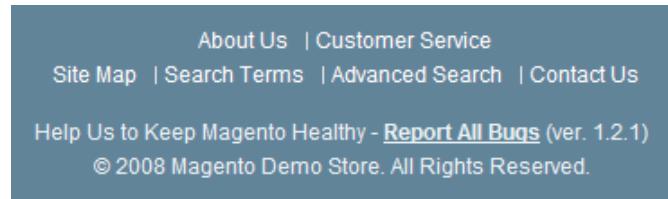
This header also provides a variety of functions on the right, as follows:



- **My Account:** Enables registered Customers to access their Orders' history, track their shipments, download products and change address information.
- **My Wish List:** Enables customers to define a list of items that they may want to purchase in the future. They can also share their wish list with their friends.
- **My Cart:** Enables customers to see the products that they have selected to purchase.
- **Checkout:** Enables customers to start the checkout process in order to specify payment, billing and shipping information.
- **Log In:** Enables each customer to identify themselves.

The Footer

The bottom of each of your web store pages shows a footer. An example is shown below:



This footer generally provides links to various informational and functional pages in the site, such as Contact Us and the Site Map.

Purchasing Functionality

My Cart

To add a product to your shopping cart, click on the **Add to Cart** icon of that product, as shown below:

The screenshot shows a shopping cart interface. At the top right, there's a 'MY CART' section with a sub-total of \$15.00 and a 'Checkout' button. Below it, a 'Recently added item(s)' section lists a green t-shirt from 'Coalesce: Functioning On Impatience T-Shirt' for \$15.00. To the right of the cart area, three products are displayed in a grid: a green t-shirt with a skeleton print, a white t-shirt with a red skull print, and a white t-shirt with a colorful paisley print. Each product has a star rating, price (\$15.00, \$22.00, \$100.00), and 'Add to Cart' buttons. Arrows point from the text descriptions to the corresponding sections on the screen.

Shirts

All Shirts 20% off

All our shirts are made with 100% cotton Love yourself. Love cotton.

4 Item(s) Show 9 per page

View as: Grid List Sort by Best Value ↑

Coalesce: Functioning On Impatience T-Shirt ★★★★★ (2) \$15.00 Add to Cart Add to Wishlist Add to Compare	Ink Eater: Krylon Bombear Destroyed Tee ★★★★★ (1) \$22.00 As low as: \$18.00 Add to Cart Add to Wishlist	The Only Children: Paisley T-Shirt \$100.00 As low as: \$70.00 Add to Cart Add to Wishlist Add to Compare
---	--	--

MY CART
There is 1 item in your cart.
Cart Subtotal: \$15.00

Checkout

Recently added item(s)

Coalesce: Functioning On Impatience T-Shirt
1 x \$15.00
[Details](#)

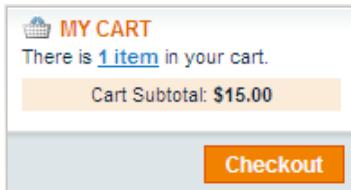
COMPARE PRODUCTS
You have no items to compare.

RECENTLY COMPARED PRODUCTS
[The Only Children: Paisley T-Shirt](#)
[The Get Up Kids: Band Camp Pullover Hoodie](#)

RECENTLY VIEWED PRODUCTS
[Coalesce: Functioning On Impatience T-Shirt](#)
[CN Clogs Beach/Garden Clog](#)
[The Get Up Kids: Band Camp Pullover Hoodie](#)
[BlackBerry 8100 Pearl](#)
[Gaming Computer](#)

The **My Cart** area shown above displays a brief list of the products in your shopping cart. The **Recently Added items(s)** area shows a list of the last three items added to your shopping cart.

Checking Out



The **My Cart** area also provides a **Checkout** button that takes a customer to the first step of the one-page checkout process, as shown below:

A screenshot of the one-page checkout process. It includes sections for "CHECKOUT AS A GUEST OR REGISTER" (with options to "Checkout as Guest" or "Register"), a "LOGIN" section for registered users, and a "YOUR CHECKOUT PROGRESS" sidebar with tabs for Billing Address, Shipping Address, Shipping Method, and Payment Method. The main form has fields for "Email Address" and "Password". At the bottom are "Continue", "Forgot your password?", and "Login" buttons, along with a note about required fields. A progress bar on the right lists steps: 2 Billing Information, 3 Shipping Information, 4 Shipping Method, 5 Payment Information, and 6 Order Review.

Most of the functionality of the checkout process is available by default. In addition, in the backend you are offered a variety of options to customize the customer checkout process, such as various payment and shipping methods that can be offered to your Customers.

A customer can make a one-time purchase as a guest or can register and create an account. Customers that have created an account can later track the status of their Order.



Tip: *Magento also offers multi-shipping functionality that enables customers to ship items to more than one address at the same time. This is a very useful feature for sending gifts, for example.*



Tip: *Customers can also register and create an account by using the **My Account** or **Log In** link on the top right of each page.*

The following shows an example of checking out as a guest by selecting the **Checkout as Guest** option in the step above:

Click **Continue** to see the next step in which the customer can enter their billing and identification information.

The screenshot shows the second step of a six-step checkout process. The steps are listed on the left: 1. Checkout method, 2. Billing Information (highlighted in orange), 3. Shipping Information, 4. Shipping Method, 5. Payment Information, and 6. Order Review. The right side displays a summary titled "YOUR CHECKOUT PROGRESS" with four items: Billing Address, Shipping Address, Shipping Method, and Payment Method. The "Billing Information" step contains fields for First Name, Last Name, Company, Email Address, Address, City, State/Province, Zip/Postal Code, Country, Telephone, Fax, and two radio buttons for shipping address selection. A note indicates "Please select region, state or province" for the State/Province field. The "Country" dropdown is set to "United States". The "Telephone" and "Fax" fields are empty. Below the form is a note: "Ship to this address" (radio button) or "Ship to different address" (radio button). A "Required Fields" note is present. At the bottom right is an orange "Continue" button.

Click **Continue** to enter the **Shipping Address**, to specify the **Shipping Method** and to determine the **Payment Method**.

The last step of the checkout process enables the customer to review the entire Order:

Product Name	Price	Qty	Subtotal
Coalesce: Functioning On Impatience T-Shirt Size Small	\$15.00	1	\$15.00
	Subtotal		\$15.00
	Shipping & Handling (Flat Rate - Fixed)		\$5.00
	Tax		\$1.24
	Grand Total		\$21.24

Forgot an item? [Edit Your Cart](#)

Place Order

YOUR CHECKOUT PROGRESS

[Billing Address](#) | [Change](#)

Test User
Company
test street 1
test street 2
Test City, California, 90123
United States
T: 123-123-1234

[Shipping Address](#) | [Change](#)

Test User
Company
test street 1
test street 2
Test City, California, 90123
United States
T: 123-123-1234

[Shipping Method](#) | [Change](#)

Flat Rate - Fixed \$5.00

[Payment Method](#) | [Change](#)

Check / Money order

Note: The right column shows the summary of information entered during the previous checkout steps and enables you to change any of the information that is incorrect.

The customer can confirm the Order and receive an Order number, or they can change their mind and edit their cart using the **Edit Your Cart** link. If they proceed with the Order and the payment is processed successfully, then the following page is displayed.

Your order has been received

Thank you for your purchase!

Your order # is: [100011640](#).

You will receive an order confirmation email with details of your order and a link to track its progress.

Click [here to print](#) a copy of your order confirmation.

Continue Shopping

A confirmation email is then sent to the customer. The content of the email can be controlled by the web store administrator. An example is shown below:



Hello Test Customer,

Thank you for your order from Main Website Store. Once your package ships we will send an email with a link to track your order. You can check the status of your order by [logging into your account](#). If you have any questions about your order please contact us at dummyemail@magentocommerce.com or call us at (555) 555-0123 Monday - Friday, 8am - 5pm PST.

Your order confirmation is below. Thank you again for your business.

Your Order #100000021 (placed on May 23, 2009)

Billing Information:	Payment Method:		
Test Customer Test Street Test City, California, 90123 United States T: 123-123-1234	Name on the Card: Test Customer Credit Card Type: Visa Credit Card Number: xxxx-1111 Expiration Date: 03/2011		
Shipping Information:	Shipping Method:		
Test Customer Test Street Test City, California, 90123 United States T: 123-123-1234	Flat Rate - Fixed		
Item	Sku	Qty	Subtotal
DVD player	3003	1	\$150.00
		Subtotal	\$150.00
		Shipping & Handling	\$5.00
		Tax	\$12.38
		Grand Total	\$167.38

Thank you again,
Main Website Store

Managing Customer Relations

Customer Emails

Magento sends a variety of automatically generated customer emails (such as when a customer places an Order or opens an account) and enables you to customize them as you require. For more information about customizing the emails sent from the store to Customers you may refer to the *Customizing Transactional Emails* section on page 147.

Ratings and Reviews

Rating and review functionality is provided by Magento to enable customers and web storeowners to give their opinions, feedback and comments about products. They appear in the frontend, as follows:



The screenshot shows a product page for a green t-shirt. The t-shirt has a graphic of a ribcage on it. The page includes a 'Quick Overview' section with the following bullet points:

- 6.1 oz. 100% preshrunk heavyweight cotton
- Shoulder-to-shoulder taping
- Double-needle sleeves and bottom hem

The quantity of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual textual reviews provided by customers.

Community Polls

Each web store can provide a Community Poll, as shown below:



COMMUNITY POLL

What is your favorite Magento feature?

Layered Navigation
 Price Rules
 Category Management
 Compare Products

Vote

This page was intentionally left blank.

3 Introducing the Backend

In order to familiarize you with the features of the backend, this chapter describes the ongoing management tasks that you can perform in the backend while running your Magento web store on a day-to-day basis.

You may refer to *Chapter 5, Setting Up Your Catalog* on page 69 for a full description of how to setup your catalog and each of the subsequent chapters for a description of other aspects of customizing your backend. This chapter contains the following sections:

- **Accessing the Backend**, page 41
- **Supervising Web Store Activities**, page 43
- **Managing Orders**, page 44
- **Managing Ratings and Reviews**, page 48
- **Generating Reports**, page 48

Accessing the Backend

The following describes how to access and log into the Magento backend and the Magento news messages.



Tip: Immediately after you install Magento, you can easily open the backend by clicking the **Go to Backend** button on the last page of the Magento Installation Wizard. We recommend that you bookmark the backend page for easy access.

► To access the Magento backend administration environment:

- 1 Use a standard web browser to navigate to the backend by entering the URL that you specified in the Magento Installation wizard with the addition of the suffix **/admin** (or the one that you specified during installation). For example if you specified **mywebstore.com** as the base URL, then use <http://www.mywebstore.com/admin> to access your backend.

The Magento Demo Store backend can be accessed at:

<http://demo-admin.magentocommerce.com/admin>

The following log in page is then displayed:

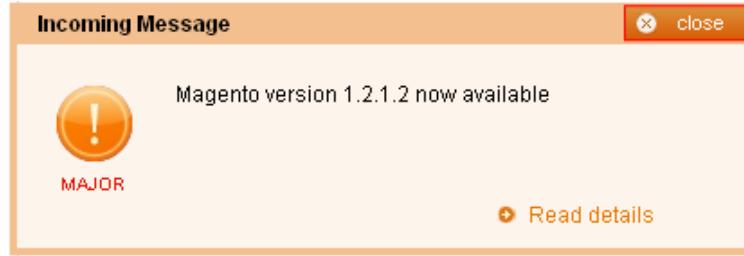
The screenshot shows the 'Log in to Admin Panel' page. It features a logo on the left, two input fields for 'User Name' and 'Password', a 'Forgot your password?' link, and a prominent orange 'Login' button. Below the form, a copyright notice reads: 'Magento is a trademark of Irubin Consulting Inc. DBA Varien. Copyright © 2009 Irubin Consulting Inc.'

- 2 Sign in using the user name and password you created during the installation process.

Note: The backend of the Magento Demo Store can be accessed using the **User Name: admin** and **Password: 123123**.

- 3 Click the **Login** button to display the administration panel, as shown above.

- 4 After you log in, the Magento messages that you have not yet read are displayed, such as the one shown below:



Additionally, information about other messages is shown in a bar just under the menu.

Latest Message: Magento version 1.2.1.2 now available [Read details](#) You have 3 major and 5 minor unread message(s). [Go to messages inbox](#).

► To display all the messages in your inbox:

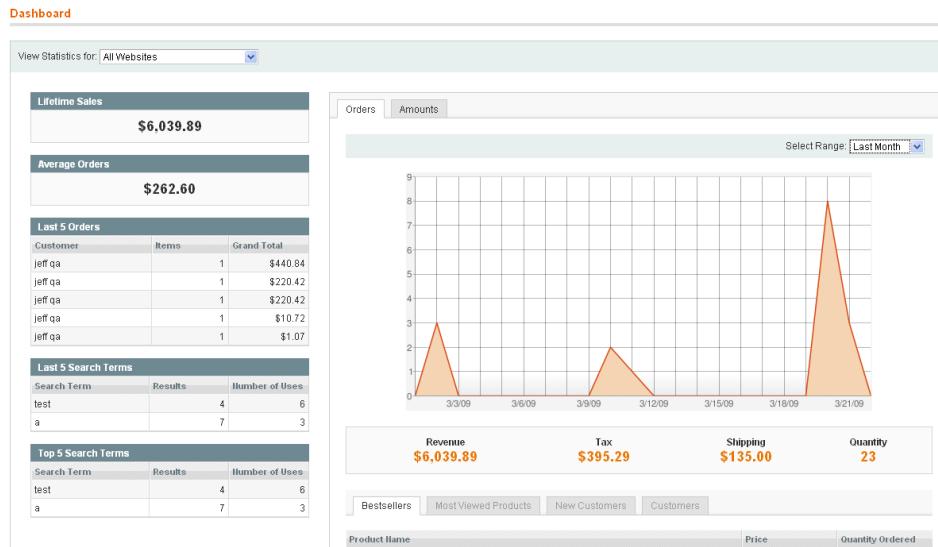
Click the **Go to messages inbox** on the top right of the page. The following page is displayed, which provides standard message handling features:

Messages Inbox			
Page	1	of 1 pages	View 20 <input checked="" type="checkbox"/> per page Total 18 records found
		Actions	
Severity	Date Added	Message	Actions
<input type="checkbox"/>	MAJOR	Mar 3, 2009 11:03:58 PM	Read Details Mark as Read Remove
<input type="checkbox"/>	MINOR	Feb 27, 2009 1:39:24 AM	Read Details Mark as Read Remove
<input type="checkbox"/>	MINOR	Feb 24, 2009 12:45:47 AM	Read Details Mark as Read Remove
<input type="checkbox"/>	MINOR	Feb 2, 2009 9:57:00 PM	Read Details Mark as Read Remove
<input type="checkbox"/>	MINOR	Jan 24, 2009 12:25:56 AM	Read Details Mark as Read Remove
<input type="checkbox"/>	MAJOR	Jan 12, 2009 8:41:49 PM	Read Details Mark as Read Remove
<input type="checkbox"/>	MAJOR	Dec 30, 2008 9:59:22 PM	Read Details Mark as Read Remove
<input type="checkbox"/>	MINOR	Dec 30, 2008 7:45:59 AM	Read Details Mark as Read Remove

You can mark selected messages as **Read** so that they do not appear again when you log in.

Supervising Web Store Activities

The Dashboard is the first page to be displayed by default after you log in. It can also be accessed by clicking the **Dashboard** tab on the top left of the page. The page displays, as shown below:



This page shows you basic information and statistics for managing your web store. The following describes the options in this page:

- **Orders:** The **Orders** tab in the center of the page, as shown above, shows a graph indicating the quantity of Orders in your web store within the last year, meaning YTD (Year to Date). Underneath you can see the revenue, tax and shipping amounts of your Orders and the total quantity.
- **Amounts:** The **Amounts** tab in the center of the page shows a graph indicating the revenue from your web store YTD (Year to Date). Underneath, you can see the revenue, quantity, tax and shipping amounts of your Orders.
- **Left Information Panel:** The panel on the left shows you the total amount of Orders handled in your Magento web store, the average amount of each Order, information about your last five Orders and the top five products for which customers have searched.

- **Bottom Information Tabs:** The bottom of the Dashboard provides additional information about your web store, as follows:

The screenshot shows the bottom navigation bar of a web store dashboard. It features four tabs: 'Bestsellers' (selected), 'Most Viewed Products', 'New Customers', and 'Customers'. Below the tabs is a table with four columns: 'Product Name', 'Price', and 'Number of Views'. The table lists five products: 'The Get Up Kids: Band Camp Pullover Hoodie' (\$30.00, 5 views), 'CN Clogs Beach/Garden Clog' (\$15.99, 2 views), 'Computer' (2 views), 'Gaming Computer' (\$4,999.95, 2 views), and 'Coalesce: Functioning On Impatience T-Shirt' (\$15.00, 2 views).

Product Name	Price	Number of Views
The Get Up Kids: Band Camp Pullover Hoodie	\$30.00	5
CN Clogs Beach/Garden Clog	\$15.99	2
Computer		2
Gaming Computer	\$4,999.95	2
Coalesce: Functioning On Impatience T-Shirt	\$15.00	2

- **Bestsellers Tab:** Shows a list of the best selling products in your web store, their price and the quantity ordered.
- **Most Viewed Products Tab:** Shows a list of the most recently viewed products and the number of times they were viewed.
- **New Customers:** Shows a list of the most recently registered customers.
- **Customers:** Shows a list of your top customers, meaning the customers that have ordered the most items from your web store in the last year.

Managing Orders

This section first describes how to view and manage Orders. It then describes how to create Orders from the backend.

Viewing the Orders in Your Web Store

► To view the Orders in your web store:

From the **Sales** menu, select the **Orders** option to display the *Orders* page, as shown below:

The screenshot shows the 'Orders' page with a table of order details. The columns include Order #, Purchased from (store), Purchased On, Bill to Name, Ship to Name, G.T. (Base), G.T. (Purchased), Status, and Action. There are two orders listed: one for 'Main Website Main Store English' on Mar 22, 2009 at 12:24:43 AM, and another for 'Main Website Main Store English' on Mar 22, 2009 at 12:24:10 AM. Both orders are \$21.24, pending status, and have a 'View' link in the Action column.

Order #	Purchased from (store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
Any		From: <input type="text"/>	To: <input type="text"/>					
<input type="checkbox"/> 100000002	Main Website Main Store English	Mar 22, 2009 12:24:43 AM	Test User	Test User	\$21.24	\$21.24	Pending	View
<input type="checkbox"/> 100000001	Main Website Main Store English	Mar 22, 2009 12:24:10 AM	Test User	Test User	\$21.24	\$21.24	Pending	View

This page displays a list of the Orders placed in your web store.

The following describes some of the options for managing Orders in this page:

- **Quantity of Orders Displayed:** The top part of the page enables you to control how many Orders are displayed in the page, as shown below:

Page of 1 pages | View per page | Total 2 records found | [New Order RSS](#)

- **Selecting Orders:** The area under this enables you to select/unselect all the Orders in your web store or to select/unselect all the Orders currently visible, meaning those that are currently displayed in this page.

[Select All](#) | [Unselect All](#) | [Select Visible](#) | [Unselect Visible](#) | 0 items selected

You can also select individual Orders by clicking the checkbox on the left of each order.

- **Filtering Orders:** The area under this enables you to filter the Orders that are displayed by filling out the following fields and then clicking **Search**.

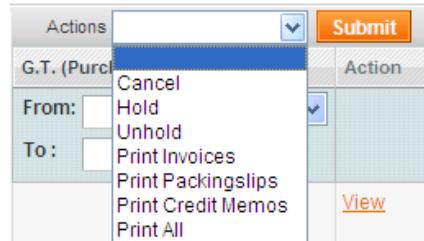
Page of 1 pages | View per page | Total 2 records found | [New Order RSS](#)

Actions									Reset Filter	Search
Order #	Purchased from (store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action		
Any		From: <input type="text"/>			From: <input type="text"/>	To: <input type="text"/>				
		To: <input type="text"/>								

Filtering Sorting

The list displays only those Orders that have all the criteria that you specified.

- **Sorting Orders:** Click on the header of a column to sort the Orders by the value of that column. Each click toggles between an ascending sort and a descending sort.
- **Order Actions:** A dropdown menu of action options is provided. The actions that may be performed on the selected Order are as follows:



- **Cancel:** Sets the Order status to **Canceled** and disables any further processing.
- **Hold:** Puts the Order's Invoice on hold. The Order's definition remains in the system enabling you to use the **Unhold** option after you have verified the Order.
- Printing options.
- **View:** To view and/or edit an existing Order, click the **View** option in an Order's row in the **Action** column to view the Order, as described below.

Viewing an Order's Details

Magento provides a large variety of information for each Order. This section shows a quick review of some of the information provided for an existing Order. The top left corner of the *Information Page* enables you to access the various pages of information provided for an Order: **Information**, **Invoices**, **Credit Memos**, **Shipments** and **Comments History**.

Information Page

The screenshot displays the 'Information' tab of the Order View page. At the top, it shows the Order ID (100000001) and Order Date (Mar 22, 2009 12:24:10 AM). The status is Pending. The purchased from section shows Main Website, Main Store, and English. Placed from IP is 127.0.0.1, and the USD rate is 1.0000. The account information shows a guest customer named test@testuser.com. The shipping address is Test User, Company, test street 1, test street 2, Test City, California, 90123, United States, T: 123-123-1234. The payment information shows a check/money order placed using USD. The items ordered table lists a Coalesce: Functioning On Impatience T-Shirt (SKU: coal_sm, Size: Small) with an original price of \$15.00 and a quantity of 1. The order totals show a subtotal of \$15.00, tax of \$1.24, shipping and handling of \$0.00, and a grand total of \$21.24. The comments history section allows adding comments and notifications.

This page provides an overview of the most important information about the Order, such as the current status of the Order, the products ordered, customer information, billing information, shipping information and payment information.

Note: *SKU (Stock Keeping Unit) specifies the product code that is used to keep track of the actual inventory.*

The **Comments History** area of this page enables you to change the status of the Order and to add comments about it.

Check the **Notify Customer** checkbox to specify that customers are sent a copy of the message.

Invoices Page

An Invoice represents a confirmation of payment. The Invoices page enables you to view the list of Invoices generated for an Order.

An Invoice can be generated when you request it or as products are shipped. If the products in an Order are shipped in multiple Shipments, then an Invoice is generated for each Shipment for the products in that Shipment.

Credit Memos

The Credit Memos page displays a list of the refunds given for products in this Order. You can click on a Credit Memo in the list to display the refund details.

Shipments Page

A Shipment is a record of the products in an Order which have been shipped. Like an Invoice, multiple Shipments can be created per Order.

The Shipment page displays a list of the Shipments sent for products in this Order. You can click on a Shipment in the list to display the Shipment details.

The Shipment page can also show the Shipment tracking number that was received from the shipping service. The tracking number enables customers to review their Order using the **My Account** option that appears in the header of the frontend.

Creating New Orders

You may want to create an Order using the backend, for example when an Order is received over the phone.



Tip: Typically, Orders are placed by customers in the frontend. In addition, you can create Orders in the backend. This enables you to take Orders by phone, mail or fax and then enter them into your web store to be managed and tracked. This feature is useful for call center operators to take Orders directly from your customers. The ordering process in the backend is not much different from the one your customers experience. The backend provides all the same functions that your customers have when creating an Order from your web store, including the ability to move products between the shopping cart and wishlist. It also enables you to give customers special prices and discounts.

► **To create a new Order from the backend:**

- 1 From the **Sales** menu, select the **Orders** option.
- 2 Click the **Create New Order** button on the top right.

A full description of this procedure is provided in the *Managing Orders* section on page 178.

Managing Ratings and Reviews

Rating and review functionality is provided by Magento to enable customers and web storeowners to submit their opinions, feedback and comments about products. Product Reviews and Ratings can also be added using the backend.

For more information about ratings and reviews you may refer to *Chapter 10, Managing Customer Generated Content* on page 185.

Generating Reports

Magento provides a variety of reports that you can access at any time.

From the **Reports** menu, select any of the numerous types of reports and then select a specific report of that type.

Some of the most important reports are described in the *Reports* section on page 197.

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4 Getting Started with Magento

This chapter describes Magento system requirements and how to install and configure it. This chapter contains the following sections:

- **System Requirements**, page 50
- **Installing Magento**, page 51
- **Basic Configuration**, page 60

System Requirements

The following provides a short list of the server requirements for running Magento properly. You can also view these specifications at:

<http://www.magentocommerce.com/system-requirements>.

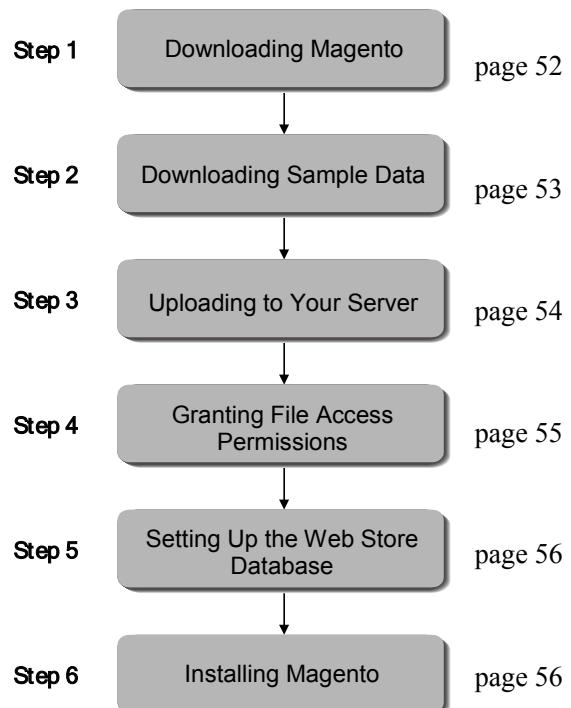
- **Supported Operating Systems:** Linux server
- **Supported Web Servers:** Apache 1.3.x or Apache 2.x
- **PHP Compatibility:** 5.2.0 and above with Safe mode off
- **MySQL:** 4.1.20 and above

If you are unsure whether your hosting company supports these specifications, please check with them or your company's system administrator. Alternatively, to download a script that verifies whether your server is compatible or not, you may refer to the following web page: <http://www.magentocommerce.com/knowledge-base/entry/how-do-i-know-if-my-server-is-compatible-with-magento>.

Installing Magento

After you have verified that your hosting environment meets Magento's system requirements, as specified above, you can download and then install Magento to your server.

The following is the workflow for downloading and installing Magento:



Step 1: Downloading Magento

Magento can be downloaded free of charge from the Magento community site.



Tip: You can download Magento whether you have registered on the community site or not. We recommend registering so that you can later access the various valuable resources that the community has to offer, such as: forums, wiki, groups and screencasts.



Tip: If you require any assistance with installing your store, Varien also offers professional installation services. For more information you may refer to the following web page:

<http://www.magentocommerce.com/store/professional-magento-installation>.

► To download Magento:

- 1 Use your web browser to navigate to <http://www.magentocommerce.com/download> and log in to display the following page or go to <http://www.magentocommerce.com> and select the **Downloads** tab from the menu to display the following page.

The screenshot shows the Magento Downloads page with three main download options:

- Downloader**: "the downloader will install the latest Magento version". It includes a link to "ver 1.2.0 - Added December 29, 2008" and a "magento-downloader-1.2.0.zip (71)" file link with a dropdown menu and a "DOWNLOAD" button. An orange arrow points to the "magento-downloader-1.2.0.zip" link.
- Full Release**: "ver 1.2.1 - Added February 2, 2009". It includes a "Select your format" dropdown and a "DOWNLOAD" button.
- Sample Data**: "must be installed prior to the basic Magento installation". It includes a "Select your format" dropdown and a "DOWNLOAD" button.

A note at the bottom states: "Note: This page will appear slightly differently on the web after a newer version is released."

- 2 We recommend that you select the **Downloader** option, as shown above. Multiple compressed formats are provided. If you are unsure which version to download use the .zip format, as shown above.
- 3 Click the **Download** button and save the file to the location of your choice.

Step 2: Downloading Sample Data

Magento enables you to load a few basic products and information into your web store to populate your web store frontend and backend with some initial **Sample Data**. Even though you will later delete these products, it may help orient you while getting started. This step is recommended, but not mandatory.

► To download Sample Data for your Magento web store:

- 1 Navigate to <http://www.magentocommerce.com/download> and log in to display the following page or go to <http://www.magentocommerce.com> and select the **Downloads** tab from the menu to display the following page:

The screenshot shows the 'Downloads' section of the Magento website. It features three main download links:

- Downloader**: A link to 'magento-downloader-1.2.0.zip (71)' with a 'DOWNLOAD' button.
- Full Release**: A link to 'ver 1.2.1 - Added February 2, 2009' with a 'Select your format' dropdown and a 'DOWNLOAD' button.
- Sample Data**: A link to 'ver 1.2.0 - Added December 29, 2008' with a dropdown set to 'sample-data-1.2.0.zip (9,8 Mb)' and a 'DOWNLOAD' button.

A note at the bottom states: *Note: This page will appear slightly differently on the web after a newer version is released.*

- 2 Select a format for downloading **Sample Data**. Multiple compressed formats are provided. If you are unsure of which version to download, then use the .zip format, as shown above.
- 3 Click the **Download** button and save the file to the location of your choice.

Step 3: Uploading to Your Server

After you have downloaded the Magento downloader and Magento Sample Data, you must upload these packages to your server.

► To upload to your server:

- 1** The file names are: **magento-downloader-x.x.x.zip** for the Magento downloader and **magento-sample-date-x.x.x.zip** for the Magento Sample Data. Extract (unzip) the files to a directory of your choice.
- 2** Use your favorite FTP/SFTP program to copy the contents of the **magento** folder from the Magento downloader package to the server's root WWW directory (which is usually named **public_html**) or any other subdirectory of your choice, such as **/store**.
- 3** If you would like to add sample images to the sample products in your store, copy the contents of the **Media** folder from the **Sample Data** package onto the new **Media** folder on your server. This step is optional and only necessary for seeing product photos that represent each one of the sample products.

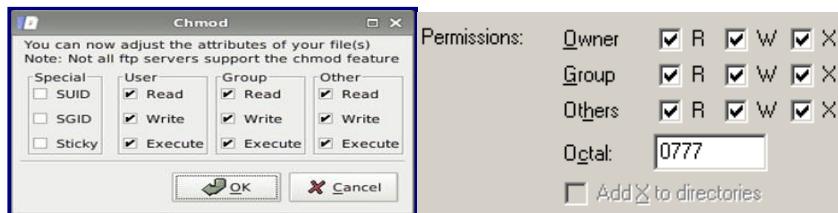
Step 4: Granting File Access Permissions

The top-level Magento directory on the server (the directory to which you uploaded the decompressed files) and all Magento directories under it must have the correct permissions in order for the Magento Installer to operate properly.

► To grant file access permissions:

- 1 Navigate to your Magento directory on the server using your FTP/SFTP client.
- 2 Use the **Change Permissions** or the **Change Mode** function of your FTP/SFTP client to grant permission to the web server to write to these files and folders. There are two typical ways of representing file permissions in Linux:
 - As a number (for example, 755)
 - As a series of permissions categorized into user, group or other

If your FTP client uses the first representation (as a number), set the permissions on the directory to **777** or **0777**. If your FTP client uses the second representation, set the permissions as shown in the image below.



Ensure that you select the **Recursive** option in order to grant all subdirectories the proper permissions.

Note: Some servers have the correct permissions already set and, therefore, no changes need to be made in this case.

Step 5: Setting Up the Web Store Database

► To create and setup the database to be used by your web store:

- 1 Use a database management application, such as **phpMyAdmin** or a tool provided by your hosting provider to create a new database and to assign users and permissions to it.
- 2 Import the file **magento_sample_data_for_1.2.0.sql** using **phpMyAdmin** into this new database. This step is only required if you want to install Sample Data as recommended previously.



Tip: If you are unsure of how to proceed with this installation, you may refer to our professional installation service for help at <http://www.magentocommerce.com/store/professional-magento-installation>.

You are now ready to install Magento!

Step 6: Installing Magento

► To install Magento:

- 1 Use a standard web browser to navigate to your server. If everything has been set up correctly as described up until now, the Magento Installation Wizard Welcome page is displayed, as shown below:



If error warnings are displayed, handle the errors before proceeding and then reload this page.

- 2** Click **Start the download process** and wait until Magento downloads all of its code. After this is completed, the following message is displayed at the bottom of the page:

A screenshot of a web page showing a green success message: "Download completed. You can proceed with installation". Below it is a large orange button labeled "Continue Magento installation". A note below the button reads: "Note: If you were unable to complete the download process through this interface due to a connection error, try to upload the Full Magento Package from the Community download page."

- 3** Click **Continue Magento installation** to proceed.
- 4** Read and agree to the terms of Magento's license. More information is provided about this subject in the *Magento License* section on page 11.
- 5** Click **Continue** to display the first of Magento's configuration pages, as shown below. Select your preferences and continue to the next page.

A screenshot of the Magento Localization configuration page. On the left, there is a sidebar with links: Download, License Agreement, **Localization**, Configuration, Create Admin Account, and You're All Set!. The main area is titled "Localization" and contains a "Locale settings" section. It includes dropdown menus for "Locale" (set to English (United States)), "Time Zone" (set to Pacific Standard Time (America/Los_Angeles)), and "Default Currency" (set to US Dollar). At the bottom of the page, there is a note: "Having trouble installing Magento? Check out our [Installation Guide](#)". A "Required Fields" indicator is shown as a red asterisk (*). A "Continue" button is located at the bottom right.

- 6** Change the default values according to your requirements and database information and click **Continue** to display the following page:

The screenshot shows the 'Configuration' tab of the Magento setup process. The 'Database Connection' section contains fields for Host (localhost), Database Name (magentostore1), User Name (root), and User Password. The 'Web access options' section includes fields for Base URL (www.magentostore.com) and Admin Path (admin). It also features checkboxes for skipping URL validation and using web server rewrites. The 'Session storage options' section shows 'Save session data in' set to 'File system'. A note at the bottom indicates that the 'Use Web Server (Apache) Rewrites' option requires mod_rewrite to be enabled.

Installation		Configuration	
Download License Agreement Localization Configuration Create Admin Account You're All Set!	Database Connection Host * <input type="text" value="localhost"/> Database Name * <input type="text" value="magentostore1"/> <small>You can specify server port, ex.: localhost:3307 If you are not using default UNIX socket, you can specify it here instead of host, ex.: /var/run/mysqld/mysqld.sock</small> User Name * <input type="text" value="root"/> User Password <input type="password"/> Tables Prefix <input type="text"/> <small>(Optional. Leave blank for no prefix)</small>		
	Web access options Base URL * <input type="text" value="www.magentostore.com"/> Admin Path * <input type="text" value="admin"/> <small>Additional path added after Base URL to access your Administrative Panel (e.g. admin, backend, control etc.).</small> <input type="checkbox"/> Skip Base URL validation before next step <small>Check this box only if it is not possible to automatically validate Base URL.</small> <input checked="" type="checkbox"/> Use Web Server (Apache) Rewrites <small>You could enable this option to use web server rewrites functionality for improved search engines optimization. Please make sure that <code>mod_rewrite</code> is enabled in Apache configuration.</small> <input checked="" type="checkbox"/> Use Secure URLs (SSL) <small>Enable this option only if you have SSL available.</small> Secure Base URL * <input type="text" value="www.magentostore.com"/> <small>Provide a complete base URL for SSL connection. For example: https://www.mydomain.com/magento/</small> <input checked="" type="checkbox"/> Run admin interface with SSL <input type="checkbox"/> Skip Secure URL validation before next step <small>Check this box only if it is not possible to automatically validate Secure URL, for example if HTTP authentication is required.</small>		
	Session storage options Save session data in <input type="text" value="File system"/>		
	<small>* Required Fields</small> <input type="button" value="Continue"/>		

- 7** We strongly recommend setting the following options if your server has an SSL certificate installed:

- Use secure URLs (SSL)
- Run the admin interface with SSL

We also recommend setting the Use Web Server (Apache) Rewriters.

The first two options make purchasing and administration more secure. Usually, you can leave the other options as they are.

8 Click **Continue** to display the next page, as shown below:

The screenshot shows the 'Create Admin Account' step of the Magento installation process. On the left, a sidebar lists steps: Download, License Agreement, Localization, Configuration, Create Admin Account (which is highlighted in green), and You're All Set!. Below this is a note about trouble installing Magento and a link to the Installation Guide.

The main area is titled 'Create Admin Account' and contains three sections: 'Personal Information', 'Login Information', and 'Encryption Key'. In 'Personal Information', fields for First Name (Store), Last Name (Owner), and Email (owner@magentostore.com) are shown. In 'Login Information', fields for Username (admin) and Password (***** and Confirm Password *****) are shown. In 'Encryption Key', there is a text input field with a note explaining its purpose.

At the bottom right are buttons for 'Required Fields' (marked with an asterisk) and 'Continue'.

9 This page enables you to specify access information, as follows:

- Enter the administrator's name and email.
- Create a username and password.
- Leave the **Encryption Key** field empty to display the key, as shown below.

10 Click **Continue** to display the next page, as shown below:

The screenshot shows the 'You're All Set!' step of the installation process. The sidebar remains the same. The main area has a title 'You're All Set!' and a note: 'Get ready to experience Open-Source eCommerce Evolved.' It also includes a note about encryption keys and a specific key value: '6b4248230eb71e45724ff34e62c174d'.

Below the key is a note: '(Make sure you keep it in a safe place.)' and two buttons: 'Go to Frontend' and 'Go to Backend'.

A yellow callout box contains a lightbulb icon and the text: 'Tip: Write down the encryption key in a safe place. If you need or want to move your store data to a new Magento site, you will need this encryption key to recover the encrypted data.'

Congratulations! You have now completed the installation of Magento!

You can visit your new Magento storefront by selecting the **Go to Frontend** button or by typing the URL of your store in the browser.

You can also access the administration backend and begin configuring your new web store, as described in the *Accessing the Backend* section on page 41.



Tip: You can easily open the backend by clicking the **Go to Backend** button on the last page of the Magento Installation Wizard, shown above. We recommend that you bookmark this page for easy access.



Tip: The process described above sets you up with a single website, single store and three store views for different languages. This is most probably all you need. However, if you would like to create a more sophisticated web store with multiple options, then you may refer to <http://www.magentocommerce.com> for more information.

Basic Configuration

The following describes how to configure the basic information for your web store. The other aspects of your web store to be configured are described in the subsequent chapters of this guide.

Launch the backend and log in, as described in the *Accessing the Backend* section on page 41. Perform each of the following steps:

HTML Head

► **To define general page features:**

- 1 From the **System** menu, select the **Configuration** option to display the configuration page.

This page enables you to configure various aspects of the store. The left menu provides sections, such as **General**, **Catalog**, **Customers**. Clicking on each subsection in a section shows a set of tabs in the center of the page. You can expand or hide each of the tabs by clicking on them.

- 2** In the panel on the left, select the **Design** option under **General** to display the following:

The screenshot shows the Magento Admin Panel. On the left, there is a sidebar with the following navigation options:

- Current Configuration Scope: Default Config
- Manage Stores
- Configuration
 - GENERAL (selected)
 - General
 - Web
 - Design (selected)
 - Currency Setup
 - Store Email Addresses
 - Contacts

On the right, the main content area is titled "Design". It contains a "Save Config" button and a list of expandable sections:

- Package
- Themes
- HTML Head
- Header
- Footer
- Product Image Watermarks

- 3** Select the **HTML Head** option to expand the page to display the following:

The screenshot shows the "HTML Head" configuration page. At the top, there are several input fields:

- Default Title: Magento Commerce
- Title Prefix: (empty)
- Title Suffix: (empty)
- Default Description: Default Description
- Default Keywords: Magento, Varien, E-commerce
- Default Robots: INDEX, FOLLOW
- Miscellaneous scripts: (empty text area)

A note below the Miscellaneous scripts field states: "This will be included before head closing tag in page HTML".

At the bottom, there are three more expandable sections:

- Header
- Footer
- Product Image Watermarks

- 4** In the **Default Title** field specify the browser title to appear in the pages of your web store that do not have their own title. This information is also used to improve search engine visibility and performance.

- 5 Specify a prefix and a suffix to be appended to the pages of your web store that have their own title, such as a prefix of **My Web Store**.
- 6 In the **Default Description** and **Default Keywords** fields specify words that describe your web store to be used by search engines when page-specific information is not provided. Keywords must be separated by commas.
- 7 Click the **Save Config** button on the top right of the page.

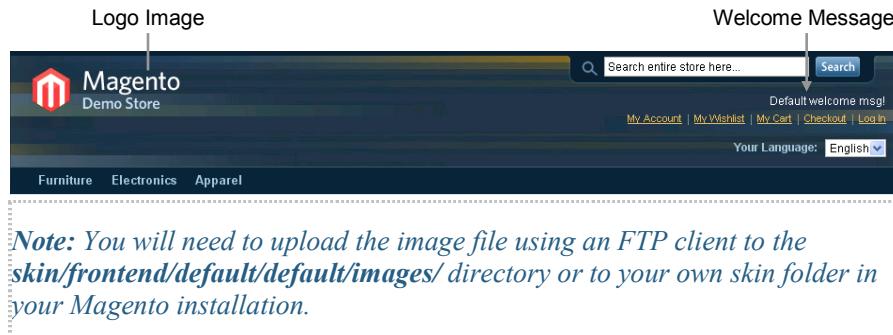
Header

► **To define the header of each web store page:**

- 1 Select the **Header** option to expand the page to display the following:

Header	
Logo Image Src	<input type="text" value="images/logo.gif"/>
Logo Image Alt	<input type="text" value="Magento Commerce"/>
Welcome Text	<input type="text" value="Default welcome msg!"/>

- 2 In the **Logo Image** field, specify the logo to appear on the top left of each page of your web store, as shown below for the Magento Demo Store. Make sure that you name your logo something other than **logo.gif**, so it does not get overwritten in future upgrades.



- 3 In the **Logo Image Alt** field, specify the alternative text to be displayed when you hover over the Logo Image in your web store.
- 4 In the **Welcome Text** field, specify the welcome message to be displayed on the top right of your web store for customers that are not logged in, as shown above.

Footer

► **To define the footer of each web store page:**

- 1 Select the **Footer** option to expand the page to display the following:



- 2 In the **Copyright** field, specify your web store's copyright information.
- 3 In the **Miscellaneous HTML** field, enter the HTML code to be shown just before the end of page. This area is usually used for adding tracking scripts that track your customers' activity on the site.

Web Store Emails

► To define web store email addresses:

- 1 Select the **Store Email Address** option in the panel on the left to display the following page:

General contact	
Sender name	Owner
Sender email	owner@example.com

Sales representative	
Sender name	Sales
Sender email	sales@example.com

Customer support	
Sender name	CustomerSupport
Sender email	support@example.com

Custom email 1	
----------------	--

Custom email 2	
----------------	--

This page shows the various email addresses used for sending emails from your web store to your customers.

- 2 In each **Sender Name** field, specify the name of the sender or department from which the emails are sent.
- 3 In the **Sender Email** field specify the email address used for sending the emails.

Note: You may refer to the [Customizing Transactional Emails](#) section on page 147 for more information about emails.

Contacts

The following describes how to define the email to which customers send requests when using the **Contact Us** option at the bottom of the page of your web store.

► To define your web store contact information:

- 1 Select the **Contacts** option in the panel on the left to display the following page:

The screenshot shows the 'Contacts' configuration page in the Magento Admin. The 'Contact Us' section has 'Enable Contact Us' set to 'Yes'. The 'Email Options' section includes fields for 'Send Emails To' (set to 'hello@example.com'), 'Email Sender' (set to 'Custom email 2'), and 'Email Template' (set to 'Default Template from Locale'). A 'Save Config' button is located in the top right corner.

- 2 In the **Send Emails To** field, specify the email that is used for receiving feedback when a Customer uses the **Contact Us** option in the store.
- 3 You may use one of the emails as defined in the **Store Web Addresses** page as described above, as the email sender information.

Sales Emails

► To get a copy of sales emails sent to customers:

- 1 In the panel on the left, select the **Sales Emails** option under the **SALES** Category.
- 2 Select the **Order** option to expand the page to display the following:

Sales Emails Save Config

Order

Enabled	<input type="text" value="Yes"/>
New Order Confirmation Email Sender	<input type="text" value="Sales representative"/>
New Order Confirmation Template	<input type="text" value="Default Template from Locale"/>
New Order Confirmation Template for Guest	<input type="text" value="Default Template from Locale"/>
Send Order Email Copy To	<input type="text"/> separate by ","
Send Order Email Copy Method	<input type="text" value="Bcc"/>

Order Comments

Invoice	▼
Invoice Comments	▼
Shipment	▼
Shipment Comments	▼
Credit Memo	▼
Credit Memo Comments	▼

- 3 In the **Send Order Email Copy To** field, specify the email to which a copy of the Order confirmation email is sent. This helps you to keep track of the new Orders that come in.

Shipping Settings

This section describes how to specify shipping options, such as: origin used for shipping rate calculation or to enable/disable the multiple shipping destinations feature.

► To define shipping options:

- 1 In the panel on the left, select the **Shipping** option.
- 2 Select the **Shipping Settings** option to expand the page to display the following:

The screenshot displays the 'Shipping Settings' configuration page. At the top right is a 'Save Config' button. Below it are two main sections: 'Origin' and 'Options'.
Origin:
Country: United States
Region/State: California
ZIP/Postal Code: 90034
City: (empty)
Options:
Allow Shipping to multiple addresses: Yes
Maximum qty allowed for Shipping to multiple addresses: 100

- 3 Configure the options to match your store.

This page was intentionally left blank.

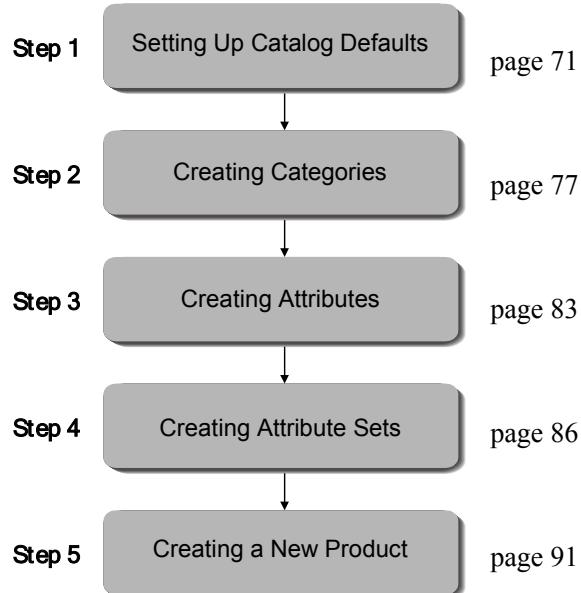
5 Setting Up Your Catalog

This chapter describes how to create a catalog for your Magento web store, how to add products and how to define their Attributes. This chapter contains the following sections:

- **Overview**, page 70
- **Setting Up Catalog Defaults**, page 71
- **Managing Categories**, page 76
- **Managing Product Attributes**, page 81
- **Creating Attribute Sets**, page 86
- **Managing Products**, page 90

Overview

The best workflow for creating your products is as follows:



The following describes the above process:

- **Step 1: Setting Up Catalog Defaults**, page 71. This step describes how to set basic Catalog defaults that define its behavior.
- **Step 2: Creating Categories**, page 77. The first step is to create the Categories that will contain your products. Each product can be assigned to one or more Categories.

A Magento store with Sample Data provides three such Categories: **Furniture**, **Electronics** and **Apparel**. Categories may have Sub-Categories. A customer can click on a Category to see a dropdown menu of Sub-Categories of products, such as **Cell Phones**, **Cameras** and **Computers**, as shown below:



- **Step 3: Creating Attributes**, page 83. Next, you can create the Attributes that represent a product's characteristics. Attributes are a powerful Magento concept to make finding and comparing products easier.

- **Step 4: Creating Attribute Sets**, page 86. Attribute Sets are logical groups of Attributes that simplify the process of assigning Attributes to a product. They do not appear in the front-end user interface.
 - **Creating a New Attribute Group**, page 89. Part of the process of creating an Attribute Set is to create Attribute Groups. These Groups determine how Attributes appear in the backend when defining a product.
- **Step 5: Creating a New Product**, page 91. This step shows how to fill in product information in order to maximize conversion and how to assign Categories to help customers navigate to the products of interest to them. Attribute Sets and Attributes are assigned to products to describe them, provide multiple options and also help the user search through the product list.

Setting Up Catalog Defaults

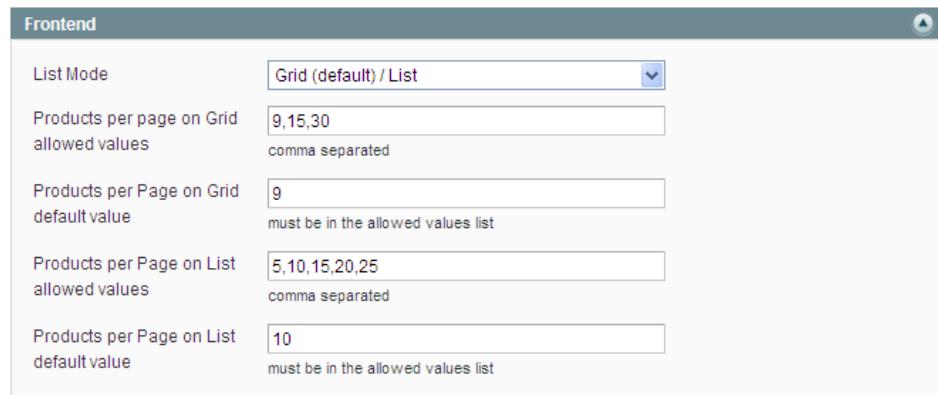
The first step to creating your catalog is to configure the catalog system settings.

► To configure catalog defaults:

From the **System** menu, select the **Configuration** option and then from the **CATALOG** area select the **Catalog** option. The following describes some of the more important sections in the page.

Frontend

This section determines how your products are shown in the frontend catalog pages.



The screenshot shows the 'Frontend' configuration section under the 'Catalog' tab. It includes fields for List Mode (set to 'Grid (default) / List'), Products per page on Grid allowed values (set to '9,15,30' with a note 'comma separated'), Products per Page on Grid default value (set to '9' with a note 'must be in the allowed values list'), Products per Page on List allowed values (set to '5,10,15,20,25' with a note 'comma separated'), and Products per Page on List default value (set to '10' with a note 'must be in the allowed values list').

- **List Mode**
 - **Grid Only**: The products are only displayed in a grid structure.
 - **List Only**: The products are only displayed in a list.

- **Grid (Default)/List:** The products are displayed in a grid structure by default, but your customers are able to switch to list.
- **List (Default)/Grid:** The products are displayed in a list structure by default, but your customers are able to switch to grid.
- **Products per Page:** Choose whether the Category pages display 9, 15 or 30 products by default. In the frontend, your customers will be able to choose between these options or display All Products.

Product Reviews

This section enables unregistered guests in your store to write product reviews. You should disable this setting if you expect or experience inappropriate reviews being posted.

The screenshot shows a configuration interface titled "Product Reviews". It contains a single dropdown menu labeled "Allow guests to write reviews" with the value "Yes" selected.

Product Alerts

You can allow your customers to subscribe to two types of customer alerts by email. Each alert has its own enable dropdown and email template, but they share the same email sender. For more information on how to configure email templates and email sender addresses, you may refer to the *Customizing Transactional Emails* section on page 147 for more information.

The screenshot shows a configuration interface titled "Product Alerts". It contains five dropdown menus:

- "Allow alert when product price changes": Value "No"
- "Price alert Email Template": Value "Default Template from Locale"
- "Allow alert when product comes back in stock": Value "No"
- "Stock alert Email Template": Value "Default Template from Locale"
- "Alert Email Sender": Value "General contact"

The Price Alert creates a link called **Sign up for price alert**, in every product page. Clicking this link subscribes your customers to this alert so that they receive an email each time the product price is changed. This includes adding or changing **Special Prices** in addition to the regular **Price** field.

The Stock Alert creates a link called **Sign up to get notified when this product is back in stock** in every **Out of Stock** product. Clicking this link subscribes your customer to this alert so that they receive an email when the product status changes to **In Stock**.

For each product, there is a tab listing all the customers subscribed to either of these alerts.

Product Image Placeholders

This section enables you to specify an image for each of the sizes that are used instead of the product image, if it is missing.

Recently Viewed/Compared Products

This feature is described in detail in the *Recently Viewed* section on page 24. The configuration section enables specifying how many products are shown.

The screenshot shows a configuration interface for 'Recently Viewed/Compared Products'. It includes fields for 'Show for Current' (set to 'Website'), 'Default Recently Viewed Products count' (set to 5), and 'Default Recently Compared Products count' (set to 5).

Search Engine Optimizations

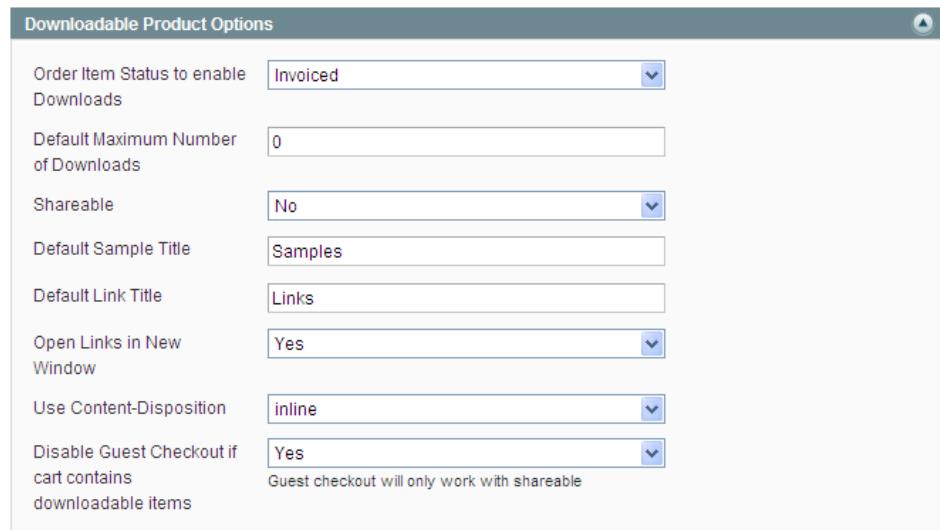
In order to make your site more search engine friendly configure the following:

The screenshot shows a configuration interface for 'Search Engine Optimizations'. It includes fields for 'Popular search terms' (set to 'Enable'), 'Autogenerated site map' (set to 'Enable'), 'Product URL Suffix' (.html), 'Category URL Suffix' (.html), 'Use categories path for product URLs' (set to 'Yes'), and 'Page Title Separator' (-).

- **Popular Search Terms:** Enable this feature to display a **Search Terms** link in the footer of the frontend pages. This enables customers to link to a list of all search terms. This is an SEO (Search Engines Optimization) feature because each of these search terms counts as a link to your site and is explored by search engines to discover content on your site.
- **Auto generated Site Map:** Enable this feature to display a **Site Map** link in the footer of the frontend pages. This enables a customer to link to an automatically generated site map including a list of all of your existing Categories. In addition to the Auto generated site map, Magento enables integration with Google Sitemap. More information is provided in the following pages.
- **Use Categories Path for Product URLs:** This option determines how the URL is composed. Select **Yes** to specify that the URL links for products includes the associated Category and a separate link is generated for each associated Category. Select **No** to specify that the URL Rewrites include only the product name and that there is only one link, regardless of how many Categories with which the product is associated.

Downloadable Products Options

This section controls the setting for products of Downloadable type. The most important settings are:



The screenshot shows a configuration form titled 'Downloadable Product Options'. It contains several input fields and dropdown menus:

- Order Item Status to enable Downloads:** A dropdown menu set to 'Invoiced'.
- Default Maximum Number of Downloads:** An input field containing the value '0'.
- Shareable:** A dropdown menu set to 'No'.
- Default Sample Title:** An input field containing the value 'Samples'.
- Default Link Title:** An input field containing the value 'Links'.
- Open Links in New Window:** A dropdown menu set to 'Yes'.
- Use Content-Disposition:** A dropdown menu set to 'inline'.
- Disable Guest Checkout if cart contains downloadable items:** A dropdown menu set to 'Yes'. A note below it states: 'Guest checkout will only work with shareable'.

- **Order Item Status to enable Downloads:** Controls whether customers can access their downloadable product links immediately after the order is placed or only after the order status is changed by the store admin.

- **Shareable:** Setting this option to **Yes** enables non-registered customers to access their downloads. This is the only option for customers to access their products if you want to offer guest checkout or quick checkout methods, such as PayPal Express or Google Checkout. This setting can be changed when editing a product.
- **Disable Guest Checkout if cart contains downloadable items:** This setting disables the Guest Checkout option only if there are downloadable items in a cart and leaves it enabled if a customer is purchasing other products.
- **Default Sample Title and Default Link Title:** These settings control what is throughout the store when referring to samples and downloadable products (links).

Managing Categories

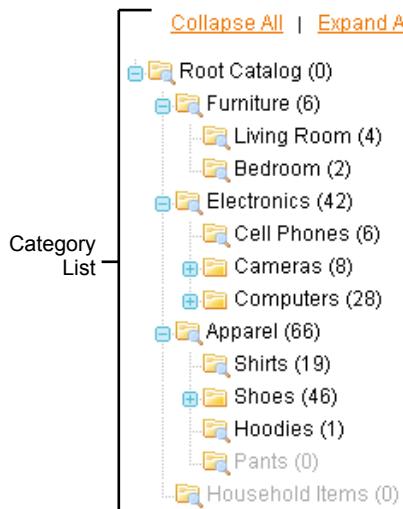
In this section, you will learn how to display, create and edit Categories and Sub-Categories.

The products in the web store are grouped into Categories, which are shown in a bar near the top of the store web page when the default theme is used. Each product can be assigned to one or more Categories, as described in the *Finding the Right Products* section on page 16.

Displaying Categories

► To display a list of all defined Categories:

From the **Catalog** menu, select the **Manage Categories** option. The following shows an example of a list of Categories:



The Categories are shown in a tree on the left. If you have loaded Sample Data, these sample Categories (Furniture, Electronics and Apparel) will appear in the Category tree. Disabled Categories appear grayed out.

Creating Categories

This section describes the most important features in creating a Category.

► To create a new Category:

- 1 Select a branch in the Category tree. If this is a top level Category, then select the root of the tree called **Root Catalog**. If you want to define a Sub-Category, then select the branch of the Category to which it belongs.
- 2 Click the **Add New Category** button. Three tabs of information are provided to describe this Category: **General Information**, **Category Products** and **Custom Design**.

Mandatory fields appear with a red asterisk (*).

General Information Tab

Most of the fields in this page are self-explanatory. In this tab, you are asked to provide a Category name, description, image (used to represent your category) as well as Meta keywords and description for better search engine positioning.

General Information	
Name *	<input type="text"/> [STORE VIEW]
Description	<input type="text"/> [STORE VIEW]
Image	<input type="button" value="Browse..."/> [STORE VIEW]
Page Title	<input type="text"/> [STORE VIEW]
Meta Keywords	<input type="text"/> [STORE VIEW]
Meta Description	<input type="text"/> [STORE VIEW]
CMS Block	<input type="text" value="Please select static block ..."/> [STORE VIEW]
Display Mode	<input type="text" value="Products only"/> [STORE VIEW]
Is Active	<input type="text" value="No"/> [STORE VIEW]
Is Anchor	<input type="text" value="No"/> [GLOBAL]
URL key	<input type="text"/> [GLOBAL]

- 1 In the **CMS Block** field, select the CMS block that you would like to be shown for this Category. This block must first be created in the CMS section.

- 2** In the **Display Mode** field, select one of the following options to specify how you would like your category listing page to appear:
 - **Static block only**
 - **Static block and product list below it**
 - **Product list only**
- 3** Set the **Is Active** field to **Yes** to specify that this Category appears in the store.
- 4** In the **Is Anchor** field, select **Yes** to specify that this Category page is an anchor. Anchors are used for the Layered Navigation in Magento, as described in the *Layered Navigation* section on page 79.

If you set the Category to be an anchor for Layered Navigation, then your web store displays the Sub-Categories of this Category in the **SHOP BY** panel on the left. This area also shows a linked list of the filterable Attributes of the products in this Category and its Sub-Categories.

The following shows the **SHOP BY** panel for the Apparel Category which is set as an anchor.



Catalog Products Tab

This tab enables you to specify the products that belong to this Category. Check the relevant check boxes. You can use filters to limit the products that are shown. Use the **Reset Filter** button to show all products. You can also assign products to Categories when editing products.

- Click the **Save Category** button on the top right of the page. You may need to refresh the page to display the Category or Sub-Category in the tree.



*Advanced Tip: The **Custom Design** tab provides special options for advanced category design changes..*

Editing Categories

► To edit a Category:

Click on a Category in the tree, edit its information and click **Save Category**.

Layered Navigation

What is Layered Navigation?

Of course, you want the customers browsing through your site to find the products that interest them in the fastest possible way. Otherwise, your sales opportunities are lost. When a customer is confronted with a Category containing 60 products spread across multiple pages, most customers simply leave the site when they cannot find what they need on the first page. Magento enables you to provide customers with the option to find the products that they want by making a selection from a variety of filters, such as price, manufacturer or any other aspect of the products, as shown below. Layered Navigation information is shown on category listing pages while searching for products. Show your customers what they want and you will raise conversions!

The following example shows an enabled layered navigation filter by PRICE range and COLOR.



Default Layered Navigation

In Magento, two properties appear as navigation filters by default: **PRICE** and **CATEGORY**.

- **PRICE:** Price ranges are selected logically in order to provide another filter for navigation. The ranges themselves are determined by the prices of products contained within them. There are never more than ten price ranges displayed at a time and products are distributed accordingly.
- **CATEGORY:** If you define a Category as an **Anchor Category**, its Sub-Categories are displayed as layered navigation options. This is defined in the **Is Anchor** field in the **Catalog** menu ➔ **Manage Categories** option, as described on page 76. The image above shows that the first filter is **CATEGORY** and it features two options: Shirts and Shoes. In this example, Shirts and Shoes are Sub-Categories of the Category represented by this layered navigation block.

Defining Layered Navigation Filters

The additional filters in the screenshots above are **Manufacturer** and **Shoe Type**. These are product Attributes that have been selected as filterable. This is defined in the **Use in Layered Navigation** field in the **Catalog** menu ➔ **Attributes**, as described on page 83.

There are two types of filterable Attributes, as follows:

- **Filterable (with results):** Means that links only appear for values where the number of results (the number in parentheses next to each value) is greater than zero.
- **Filterable (no results):** Means that links appear for all values, whether the number of results is zero or greater.

In order for an Attribute to appear as a layered navigation filter, the **Catalog Input Type for Storeowner** must be **Dropdown**, **Multiple Select** or **Price**. This controls the number of possible filter options and makes them consistent.

Managing Product Attributes

What is an Attribute in Magento?

An Attribute represents a property of a product, such as: its name, image, SKU, color, manufacturer and so on. Although this may seem a bit abstract, it is also one of the most powerful concepts in Magento and provides an almost limitless ability to control the products. Attributes enable you to add new product properties without having to write a single line of code or to add any columns to your database. Understanding attributes is crucial for making your store easy to use for customers.

Attributes are assigned by you to the products of your choice in order to enable your customers and search engines to find them more easily. Your Magento web store automatically displays products according to their Attributes, for easy accessibility by your customers, in the **SHOP BY** layered navigation panel on the left of your web store, as shown below:

The screenshot shows a Magento storefront for apparel. On the left, a layered navigation sidebar lists categories like Shirts, Shoes, Hoodies, Price ranges (\$0.00 - \$100.00, \$100.00 - \$200.00), Colors (Black, Blue, Brown, Gray, Green, Red, White), Manufacturers (Anashia, Asics, CN CLogs, Ecco, Kenneth Cole, Nine West, Steve Madden), and Shoe Types (Dress, Golf Shoes, High Heels, Running, Sandal). The main content area displays a grid of three apparel items: 'The Get Up Kids: Band Camp Pullover Hoodie' (green hoodie, \$30.00), 'Zolof The Rock And Roll Destroyer: LOL Cat T-shirt' (red t-shirt, \$13.50), and 'The Only Children: Paisley T-Shirt' (black t-shirt, \$100.00). Each item has a star rating, 'Add to Cart' button, and links to 'Add to Wishlist' and 'Add to Compare'. To the right of the products are several sidebar modules: 'MY CART' (1 item, \$15.00), 'Recently added item(s)' (Coalesce Functioning On Impatience T-Shirt), 'COMPARE PRODUCTS' (empty), 'RECENTLY VIEWED PRODUCTS' (Coalesce Functioning On Impatience T-Shirt), and 'COMMUNITY POLL' (questions about favorite Magento features).

Attributes also determine which products are displayed when a customer performs a search for a keyword.

Attributes called **System** define the properties that are required by the store to function properly.

The page above shows **PRICE** range Attributes, **COLOR** Attributes, **MANUFACTURER** Attributes and **SHOE TYPE** Attributes. Each of these Attribute Groups contain Attributes, and each Attribute is presented as a link. When a customer clicks on an Attribute link, a list of products that have that Attribute is displayed. You may refer to the *Filtering the Display of Products* section on page 18 for more information about how this feature appears to the customers that visit your web store.

A web storeowner can add as many additional Attributes as desired. In the Magento backend you can define Attributes in Sets. This eases the definition process so that similar products can be created with the same Attributes. The Attribute Sets function enables you to assign multiple Attributes to a product at one time by assigning an entire Attribute Set to a product.

If a store sells TV's, shoes, books and power tools, then four Attribute Sets could be defined: one specific to TV's, one for shoes, one for books and one for power tools. When a new power tool product is added to your catalog you can simply select the Power Tool Attribute Set to add the relevant Attributes to this product.

You should first define Attributes, then define Attribute Sets and then assign the relevant Attributes to Attribute Sets, as described below.

Creating Attributes

Attributes must be defined before defining Attribute Sets and products.

Note: Only Attribute Sets can be assigned to a product (not Attributes).

► To define Attributes:

- 1 From the Catalog menu, select the **Attributes** option and then the **Manage Attributes** option. A list of existing Attributes is displayed, as shown below:

Attribute Code	Attribute Label	Visible	Scope	Required	System	Searchable	Use In Layered Navigation	Comparable
activation_information	Activation Information	Yes	Global	No	No	No	No	No
active_from_date	Active from Date	No	Store View	No	Yes	No	No	No
active_to_date	Active to Date	No	Store View	No	Yes	No	No	No
color	Color	No	Global	No	No	Yes	Filterable (with results)	Yes
computer_manufacturers	Brand	Yes	Global	No	No	Yes	Filterable (no results)	Yes
contrast_ratio	Contrast Ratio	Yes	Store View	No	No	No	Filterable (with results)	Yes
cost	Cost	No	Website	No	No	No	No	No
country_origin	Country of Origin	Yes	Global	No	No	Yes	No	Yes
cpu_speed	CPU Speed	No	Store View	No	No	No	No	No
custom_design	Custom Design	No	Store View	No	Yes	No	No	No
custom_design_from	Active From	No	Store View	No	Yes	No	No	No
custom_design_to	Active To	No	Store View	No	Yes	No	No	No
custom_layout_update	Custom Layout Update	No	Global	No	Yes	No	No	No
description	Description	No	Store View	Yes	Yes	Yes	No	Yes
dimension	Dimensions	Yes	Global	No	No	Yes	No	Yes
disable_googlecheckout	Not available for purchase with Google Checkout	No	Global	No	Yes	No	No	No
finish	Finish	Yes	Global	No	No	Yes	No	Yes
gallery	Image Gallery	No	Global	No	Yes	No	No	No
gender	Gender	No	Global	Yes	No	Yes	No	No
gift_message_available	Allow Gift Message	No	Global	No	Yes	No	No	No

- 2** Click the **Add New Attribute** button to display the following page in which you can define a new Attribute.

The screenshot shows two stacked configuration panels for an attribute:

- Attribute Properties:**
 - Attribute Code ***: A text input field with a note: "For internal use. Must be unique with no spaces".
 - Scope**: A dropdown set to "Store View" with a note: "Declare attribute value saving scope".
 - Catalog Input Type for Store Owner**: A dropdown set to "Text Field" with a note: "Text Field or Text Area".
 - Default value**: An empty text input field.
 - Unique Value**: A dropdown set to "No" with a note: "Not shared with other products".
 - Values Required**: A dropdown set to "No".
 - Input Validation for Store Owner**: A dropdown set to "None".
 - Apply To ***: A dropdown set to "All Product Types".
- Frontend Properties:**
 - Use in quick search**: A dropdown set to "No".
 - Use in advanced search**: A dropdown set to "No".
 - Comparable on Front-end**: A dropdown set to "No".
 - Use In Layered Navigation**: A dropdown set to "No" with a note: "Can be used only with catalog input type Dropdown, Multiple Select and Price".
 - Use In Search Results Layered Navigation**: A dropdown set to "No" with a note: "Can be used only with catalog input type Dropdown, Multiple Select and Price".
 - Position**: An empty text input field with a note: "Position of attribute in layered navigation block".
 - Visible on Catalog Pages on Front-end**: A dropdown set to "No".
 - Allow HTML-tags on Front-end**: A dropdown set to "Yes".

- 3** In the **Attribute Code** field, specify a unique identifier for this Attribute. Do not use spaces. This name does not appear in the web store interface shown to customers.
- 4** In the **Scope** field select the **Global** option.
- 5** In the **Catalog Input Type for Storeowner** field, select **Dropdown**. This setting controls how a store administrator can enter values for attributes. For descriptive textual Attributes, you can use the **Text Field** or **Text Area** types, for list prices you can use the **Price** type. However, not all types can be used for layered navigation.
- 6** In the **Use in Layered Navigation** field, select the **Filterable (with Results)** option so that the Attribute is shown only when there are products that use it.

- 7** In the **Visible on Catalog Pages on Frontend** field, select **Yes** to specify that this Attribute appears in the **Additional Information** part of a products page in the web store, as shown below:

Additional Information	
Model	LX.FR206.001
Brand	Acer
In Depth	<ul style="list-style-type: none"> • Mobile AMD Athlon 64 2800+ • 1MB L2 Cache • 512MB of PC2700 DDR333 SDRAM • 2 RAM Slots (0 open - upgrading requires chip removal) • RAM is upgradeable to 2GB
Screensize	15-inch, 200-nit, high-brightness TFT LCD screen
Harddrive	80 gig Western Digital
Processor	Mobile AMD Athlon 64 2800+
Memory	512MB of PC2700 DDR333 SDRAM

Select other options to suite your requirements:

Selecting the **Use in Quick Search** or the **Use in Advanced Search** options causes this Attribute to be searchable in the store.

The **Comparable on Front-end** field specifies that this Attribute will appear in the compare window when products are compared.

- 8** Select the **Manage Labels** button on the top left of the page to display the following page:

The screenshot shows the 'New Product Attribute' interface. At the top right are buttons for Back, Reset, Save Attribute, and Save And Continue Edit. On the left, there's a sidebar with tabs for Properties and Manage Label / Options. The main area has two main sections: 'Manage Titles (Size, Color, etc.)' and 'Manage Options (values of your attribute)'. Under 'Manage Titles', there are four input fields for Admin, English, French, and German. Under 'Manage Options', there are five columns: Admin, English, French, German, Position, and Is Default, with an 'Add Option' button at the bottom.

- 9** Click the **Add Options** button and then enter a value that can be selected for this Attribute which will appear in the web store in the **SHOP BY** panel. For example: if you defined an Attribute called **Collar Type**, then its values can be **Flat** and **Standing**. Use the **Add Options** button for each Attribute value to be added. In this case, you would use it twice, once for **Flat** and once for **Standing**, as shown below:

Note: If your web store works with multiple languages, then enter the Attribute in each language. If you do not enter a value of a specific language, the Magento uses the default language. The Magento Demo Store is a multi-language web store. However, this guide does not describe how to define multi-language web stores.

- 10** Click **Save Attribute**.

Creating Attribute Sets

Attribute Sets contain a set of Attributes. Only Attribute Sets can be assigned to a product (not Attributes). If you would like to add a small number of Attributes, you can add them to the Default set, but if you want to add Attributes that will be applied only to a subset of products, it is advisable to create an Attribute Set for each set of Attributes that you would like to assign to products. Attribute Sets can inherit from each other, thus saving you from redefining sets of Attributes that apply to many different products.

► **To create a new Attribute Set:**

- 1 From the **Catalog** menu, select the **Attributes** option and then the **Manage Attribute Sets** option. A list of existing Attribute Sets is displayed, as shown below:

The screenshot shows a list of attribute sets in a Magento interface. The 'Set Name' column lists items like 'Cameras', 'Cell Phones', 'Computer', 'CPU', 'Default', 'Furniture', 'Hard Drive', 'Monitors', 'RAM', 'Shirts (General)', 'Shirts Other', 'Shirts T', 'Shoes', and 'Warranties'. The 'Default' row is highlighted with a yellow background. At the top right, there is an 'Add New Set' button.

Note: The page above shows the Attribute Sets that are provided in Magento's Sample Data.

Note: The Default Attribute Set is comprised mostly of system Attributes. This Attribute Set is typically inherited by all other Attribute Sets. System Attributes are indicated by an icon with an orange dot. ☰

- 2 Click the **Add New Set** button to display the following page in which you can define a new Attribute Set.

The screenshot shows the 'Edit Set Name' form. It has fields for 'Name' (with a note '(For internal use) *') and 'Based On' (with a dropdown menu showing 'Default'). At the top right are 'Back' and 'Save Attribute Set' buttons.

- 3 In the **Name** field, specify the name of this Attribute Set.

- 4** In the **Based On** field, select another Attribute Set from which this Attribute Set is to inherit. This 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.

The following page is then displayed:

The screenshot shows a user interface for managing Attribute Sets. On the left, a panel titled 'Edit Set Name' displays the name 'Shoes' and a note '(For internal use) *'. In the center, a tree view under the heading 'Groups' shows a hierarchy: General, Prices, Meta Information, Images, Descriptions, Shoe Attributes (which further branches into shoe_size, shoe_type, color, gender, and Design). Below the tree are two buttons: 'Add New' and 'Delete Selected Group'. A note says 'Double click on a group to rename it'. On the right, a list titled 'Unassigned Attributes' contains a long list of attribute names, each preceded by a small icon:

- activation_information
- computer_manufacturers
- contrast_ratio
- country_origin
- cpu_speed
- dimension
- finish
- harddrive_speed
- hardrive
- max_resolution
- megapixels
- memory
- processor
- ram_size
- response_time
- room
- screensize
- shape
- shirt_size

The top left of the page shows the name of the Attribute Set that you are defining.

The center of the page shows a hierarchical tree representing Groups of Attributes. You may refer to the *Creating a New Attribute Group* section on page 89 for a description of how to define Attribute Groups.

The right side of the page shows a list of Attributes defined in other Attribute Sets, not assigned to this Attribute Set.

- 5** Select the Attributes to be assigned to this Group by dragging them from the **Unassigned Attributes** area on the right into the relevant Group in the tree in the **Groups** area in the middle.

Creating a New Attribute Group

The center of the Attribute Set definition page shows a hierarchical tree representing Groups of Attributes.

These Groups determine how Attributes appear in the backend when a product is being edited. This enables a logical grouping of Attributes.

Groups

Double click on a group to rename it

- General
 - name
 - model
 - sku
 - weight
 - manufacturer
 - status
 - tax_class_id
 - url_key
 - visibility
 - gift_message_available
 - news_from_date
 - news_to_date
- Prices
- Meta Information
- Descriptions
- Images
- Cell Phone Attributes
- Design

► To define an Attribute Group:

- 1 Click the **Add New** button in the **Groups** area in the center of the page to display a popup window asking for the Group name.
- 2 Enter the name of the new Group and click **OK**.
- 3 Click and drag Attributes from the **Unassigned Attributes** area into the newly created group to assign them to this group.
- 4 You can also click and drag Attributes that are already assigned to move them between groups.

Managing Products

This section describes how to define and edit products.



*Tip: You should first define the Attributes of a product, as described in the **Managing Product Attributes** section on page 81, before you define products that have that Attribute.*

Product Types

Magento offers a variety of product types that enable significant flexibility when defining products. The following lists the available product types and their typical usage:

- **Simple Product:** This is the most basic product type. It is suitable for all kinds of physical (shipped) products.
- **Virtual Product:** This is a product that does not require shipping or inventory. It is generally used for warranties or services.
- **Downloadable Product:** This is a digitally downloadable product that sells one or more files of a product and provides samples of those files. These downloadable files can reside on your server or be provided as URLs to any other server.
- **Grouped:** This option enables you to display several similar products on a single page. For example, if you are selling chefs' knives and you have the same knife in four sizes, you can make a **grouped product** to display all four of these sizes. Customers can select the size(s) that they want and add them to the cart from this page.
- **Configurable:** This product enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKUs) and then add these six to a **configurable product** where customers can choose the size and color, and then add it to their cart. A very similar functionality is possible by using Custom Options for Simple products. The difference between a configurable product and a product including custom options is that inventory is not checked or updated for individual options during the purchase of the latter and there is no possibility to go directly to a product with a given set of options. This also makes it hard for a search engine to find the product option.

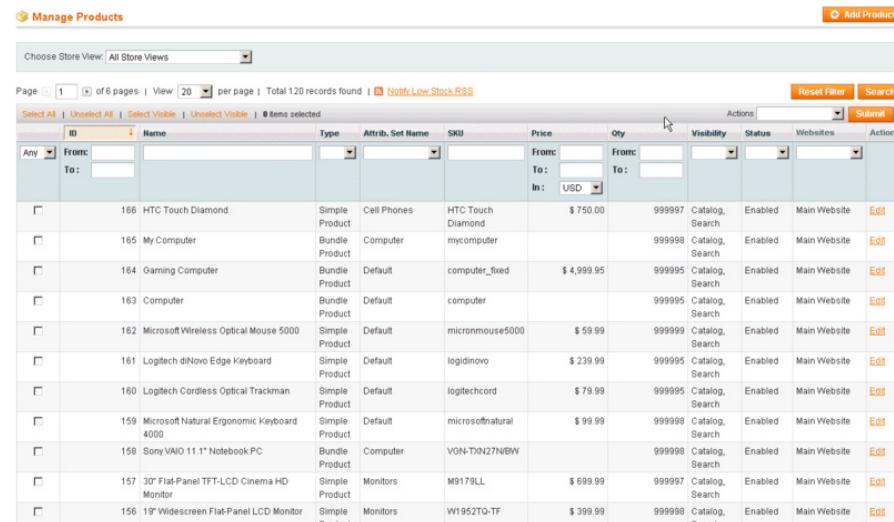
- **Bundle:** This product is comprised of components that are presented in different ways and are made from existing products. A good example of a bundle is a complete computer. For this computer, you can configure how much RAM or what kind of monitor is included with this computer in your store.

Creating a New Product

The following steps are the same for all product types. Subsequent sections describe the differences between each of the product types.

► To create a new product:

- 1 From the Catalog menu, select the **Manage Products** option to display a list of products, as shown below:



The screenshot shows the 'Manage Products' grid in the Magento Admin Panel. The grid lists 120 products across 6 pages. The columns include ID, Name, Type, Attrrib. Set Name, SKU, Price, Qty, Visibility, Status, Websites, and Action. The 'Name' column lists products like 'HTC Touch Diamond', 'My Computer', 'Gaming Computer', etc. The 'Type' column shows various product types such as Simple Product, Bundle Product, Default, and Simple Product. The 'Visibility' column indicates if products are visible in Catalog, Search, or both. The 'Status' column shows whether products are Enabled or Disabled. The 'Websites' column lists the main website for each product. The 'Action' column provides links to edit each product.

Note: The page above shows the products defined in the Sample Data provided with Magento. If you downloaded Sample Data, as described in the Step 2: **Downloading Sample Data** section on page 53, then you may want to leave the products in for you to refer to as examples and delete them later.

Note: You can duplicate the definition of a similar product to create new products by editing the product and then clicking the **Duplicate** button.

- 2 Click the **Add Product** button on the top right of the page to display the following page:

The screenshot shows a 'Create Product Settings' form. On the left, a sidebar titled 'Product Information' has 'Settings' selected. The main area is titled 'Create Product Settings' and contains two dropdown menus: 'Attribute Set' set to 'Default' and 'Product Type' set to 'Simple Product'. At the bottom is a 'Continue' button.

First Product Wizard Page

This is the first page of a product definition wizard that walks you through the process of defining a product.

- 1 In the **Attribute Set** field, select the Attribute Set that contains the Attributes that best describe this product. You may refer to the *Managing Product Attributes* section on page 81 for a description of how to define Attributes.
- 2 In the **Product Type** field, choose the type of product you want to create.
- 3 Click the **Continue** button to display a page similar to the one below (differences are due to the different product types that you may choose):

The screenshot shows a 'General' configuration page for a new product. On the left, a sidebar titled 'Product Information' has 'General' selected. The main area contains several input fields with red asterisks indicating they are mandatory: 'Name' (with a 'STORE VIEW' link), 'SKU' (with a '[GLOBAL]' link), 'Weight' (with a '[GLOBAL]' link), 'Status' (with a '[WEBSITE]' link), 'Tax Class' (with a '[STORE VIEW]' link), 'URL key' (with a '[GLOBAL]' link), 'Visibility' (with a '[STORE VIEW]' link), 'Allow Gift Message' (with a '[GLOBAL]' link), 'Manufacturer' (with a '[GLOBAL]' link), 'Color' (with a '[GLOBAL]' link), 'Set Product as New from' (with a date input and a '[GLOBAL]' link), and 'Date' (with a date input and a '[GLOBAL]' link). At the top right are 'Back', 'Reset', 'Save', and 'Save And Continue Edit' buttons. A 'Create New Attribute' button is also visible.

General Product Configuration Page

Fill in all the mandatory fields, which are indicated by a red asterisk (*).

- Set the **Status** field to **Enabled** to specify that the product is available in the store.
- Select a **Tax Class**. You may refer to the *Product Tax Class* section on page 124 for more information.

- Leave the default value in the **Visibility** field. It determines whether the product is displayed in the catalog pages and/or search results.

The following describes the other fields in this page:

- **Name:** The product name as it appears in the frontend.
- **Description:** The description that appears in the center of the product page.
- **Short Description:** The description that appears at the top of the product page.
- **SKU:** The product's SKU. Magento uses SKU as a unique identifier for this product. SKU is global, meaning if you update the SKU for a product in one web store, it updates in all other web stores as well.
- **Weight:** The product's weight. This value is usually used for shipping calculations.
- **Set Product as New from/to Date:** The date range in which this product can be promoted as a new product in various locations throughout your site.
- **URL key:** The Search Engine Friendly URL Identifier is the name used for this product in the product's URL. You cannot use spaces in this field. If the URL key is left blank, one is automatically generated by Magento.
- **Allow Gift Message:** Determines whether customers are able to add gift messages to this particular product during checkout.

Note: Additional fields may appear on this (and other pages) if you add Attributes to the Default attribute set or base the product on another Attribute Set. In the example on the previous page, the Manufacturer and Color Attributes were added to the Default set by the Sample Data that you downloaded.

Note: The **Create New Attribute** button opens a popup window that enables you to enter an Attribute to be added to the Default set. We recommend defining the Attributes structure first.

Prices Product Configuration Page

Select the **Prices** option in the **Product Information** panel on the left to display the following page:

The screenshot shows the 'Prices' configuration page. At the top right is a button labeled '+ Create New Attribute'. The page contains several input fields and a table for tier pricing.

Website	Customer Group	Qty	Price	Action
Add Tier				

Fields include:

- Price *: Input field with [GLOBAL] and [USD] dropdowns.
- Cost: Input field with [GLOBAL] and [USD] dropdowns.
- Tier Price: A table with columns Website, Customer Group, Qty, Price, and Action. An 'Add Tier' button is at the bottom.
- Special Price: Input field with [GLOBAL] and [USD] dropdowns.
- Special Price From Date: Input field with a calendar icon and [GLOBAL] dropdown.
- Special Price To Date: Input field with a calendar icon and [GLOBAL] dropdown.
- Not available for purchase with Google Checkout: A dropdown menu with 'No' selected and [GLOBAL] dropdown.

Fill in all the mandatory fields, which are indicated by a red asterisk (*).

This area enables you to enter the **Price**, **Cost** and **Special Price** information for this product. You can also add Tier Pricing, as described in the *Tier Pricing* section on page 169.

- The **Special Price** field is used for discounting or promotions, as described in the *Special Prices* section on page 167.
- The **Cost** field is only used in the backend. It can be used for generating revenue reports.

Meta Info Product Configuration Page

- 1 Select the **Meta Info** option in the panel on the left to display the following page:

Meta Information		Create New Attribute
Meta Title	<input type="text"/>	[STORE VIEW]
Meta Keywords	<input type="text"/>	[STORE VIEW]
Meta Description	<input type="text"/>	[STORE VIEW] Maximum 255 chars

- 2 Enter information that enables search engines to more easily find and index this product.

Images Product Configuration Page

- 1 Select the **Images** option in the panel on the left to display the following page:

Images							
! Image type and information need to be specified for each store view.							
Image	Label	Sort Order	Thumbnail [STORE VIEW]	Small Image [STORE VIEW]	Base Image [STORE VIEW]	Exclude	Remove
No image			<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		

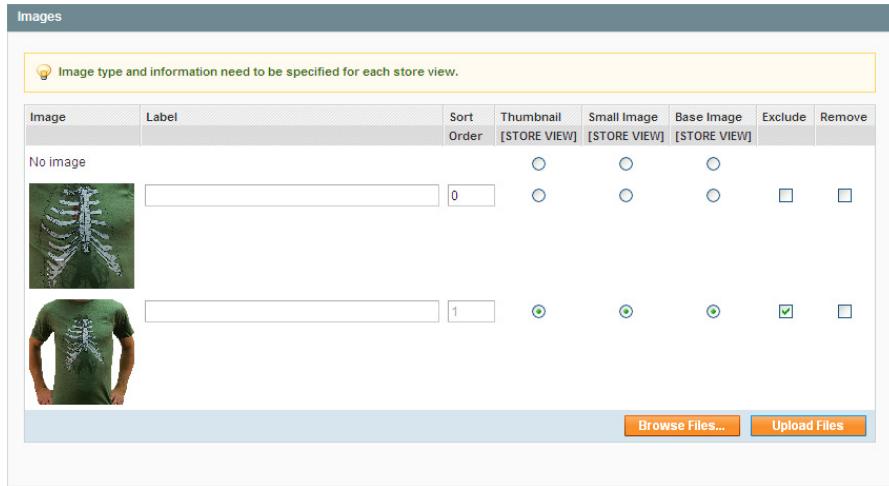
[Browse Files...](#) [Upload Files](#)

- 2 Specify the image to be displayed in the web store to represent this product. Use the **Browse** button to select the image file.



Tip: You can select more than one file in this window to upload multiple images at once.

- 3 After you have specified the image files of this product, click the **Upload Files** button. The following page is displayed after you have uploaded the image files:



- 4 Select the appropriate options for each of the images, as follows:
- **Label:** Alternate text for the image tag.
 - **Sort Order:** The order in which the images are displayed in the Slideshow and MORE VIEWS option
 - **Thumbnail:** Used in shopping cart and related items.
 - **Small Image:** Used in the Category listing, wish list and so on.
 - **Base Image:** Large product image (zoomed in).
 - **Exclude:** Excludes the image from the Slideshow and MORE VIEWS gallery.
 - **Remove:** Deletes the image from the collection.

Description Product Wizard Page

- 1 Select the **Description** option in the panel on the left to display the following page:



The screenshot shows the 'Descriptions' section of the Product Wizard. There are two fields: 'Short Description' and 'Description'. Both fields contain the same HTML content, which describes a shirt's material and construction.

Short Description *

```
<ul>
<ul class="disc">
<li>6.1 oz. 100% preshrunk heavyweight
cotton<br></li>
<li>Shoulder-to-shoulder taping<br></li>
<li>Double-needle sleeves and bottom
hem<br></li>
</ul>
```

[STORE VIEW]

Description *

```
Comfortable preshrunk shirts. Highest Quality
Printing.<br><br>
<ul>
<ul class="disc">
<li>6.1 oz. 100% preshrunk heavyweight
cotton<br></li>
<li>Shoulder-to-shoulder taping<br></li>
<li>Double-needle sleeves and bottom
hem<br></li>
</ul>
```

[STORE VIEW]

- 2** Specify what is displayed in the Product's Information page. The information that you enter in the **Description** field is shown in the product's page under the title **Product Description**. The information that you enter in the **Short Description** field appears on the product's page under the title **Quick Overview**, as shown below:

The screenshot shows a product page for a green t-shirt. At the top left is a large image of a person wearing the t-shirt, which features a white skeleton print on the front. Below this image is a link to view a full picture. To the right of the image is the product title "Coalesce: Functioning On Impatience T-Shirt" and a rating of 4 stars from 2 reviews. It also indicates that the item is in stock and lists the price at \$15.00. There are links to add the item to a wishlist or compare it to other products. A horizontal line separates this from the "Quick Overview" section. The "Quick Overview" section contains a bulleted list of product features: "6.1 oz. 100% preshrunk heavyweight cotton", "Shoulder-to-shoulder taping", and "Double-needle sleeves and bottom hem". To the right of this section is a vertical label "Short Description". Below the "Quick Overview" is a "Size" dropdown menu with a note that it is a required field. The price is listed again as \$15.00, followed by a quantity input field and an "Add to Cart" button. A yellow banner highlights the price and the "Add to Cart" button.

Double click on above image to view full picture

- +

MORE VIEWS

Coalesce: Functioning On Impatience T-Shirt

★★★★★ 2 Review(s) | Add Your Review

Availability: In stock.

\$15.00

Add to Wishlist | Add to Compare

Quick Overview

Short Description

- 6.1 oz. 100% preshrunk heavyweight cotton
- Shoulder-to-shoulder taping
- Double-needle sleeves and bottom hem

Size *

Choose option...

* Required Fields

\$15.00

Qty: Add to Cart

Description

Product Description

Comfortable preshrunk shirts. Highest Quality Printing.

- 6.1 oz. 100% preshrunk heavyweight cotton
- Shoulder-to-shoulder taping
- Double-needle sleeves and bottom hem

Additional Information

Model	Impatience
-------	------------

The information that you enter in the **Short Description** field is also shown when products are displayed in a list, as follows:

4 Item(s) Show 10 per page

View as: [Grid](#) [List](#) Sort by [Best Value](#) ↑



[Coalesce: Functioning On Impatience T-Shirt](#)

★★★★★

[2 Review\(s\)](#)
[Add Your Review](#)

\$15.00 [Add to Cart](#)

- 6.1 oz. 100% preshrunk heavyweight cotton
- Shoulder-to-shoulder taping
- Double-needle sleeves and bottom hem

[Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)



[Ink Eater: Krylon Bombear Destroyed Tee](#)

★★★★★

[1 Review\(s\)](#)
[Add Your Review](#)

\$22.00
As low as: \$18.00 [Add to Cart](#)

Now you can make your grandparents proud by wearing an original piece of graf work to YOUR family reunion!
[Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

Inventory Product Configuration Page

- 1 Select the **Inventory** option in the panel on the left to display the following page:

The screenshot shows a configuration page titled 'Inventory' with several settings for managing product stock:

- Manage Stock:** Set to **Yes** [GLOBAL] with a checked checkbox for **Use Config Settings**.
- Qty:** Set to **10** [GLOBAL].
- Qty for Item's Status to become Out of Stock:** Set to **0** [GLOBAL] with a checked checkbox for **Use Config Settings**.
- Minimum Qty Allowed in Shopping Cart:** Set to **1** [GLOBAL] with a checked checkbox for **Use Config Settings**.
- Maximum Qty Allowed in Shopping Cart:** Set to **10000** [GLOBAL] with a checked checkbox for **Use Config Settings**.
- Qty Uses Decimals:** Set to **No** [GLOBAL].
- Backorders:** Set to **No Backorders** [GLOBAL] with a checked checkbox for **Use Config Settings**.
- Notify for Quantity Below:** Set to **1** [GLOBAL] with a checked checkbox for **Use Config Settings**.
- Stock Availability:** Set to **In Stock** [GLOBAL].

- 2 In the **Manage Stock** field, select **Yes** to specify that all inventory options are available for this single product, or select **No** to specify that you do not want to manage product inventory (in this case, the product is permanently available in the store to your customers).
- 3 In the **Qty** field, specify how many items of this product you have in stock.
- 4 In the **Stock Availability** field, select the **In Stock** option.
- 5 In the **Qty Uses Decimals** field, select **Yes** to specify that customers can enter decimal quantities for this product, as opposed to integers. This is suitable for a product sold by the weight, volume or length. For example: 2.35 pounds of concrete or 3.75 feet of carpeting.
- 6 The **Backorders** field enables your customers to place an Order for a product that has a Qty of less than **0**. This option also enables you to notify your customers that even though there are no items of a product currently available, they can still place an Order. You can do this by selecting the **Allow Qty Below 0** option and the **Notify Customer** option. You can also enable this option without notifying customers by only selecting the **Allow Qty below 0** option.

- 7** The **Minimum / Maximum Qty Allowed in Shopping Cart** fields enable you to limit availability to products that have great prices to retailers, so that they are not sold to wholesale customers.
- 8** In the **Qty for Item's Status to become Out of Stock** field specifies that if stock quantity falls below this level, then the product becomes **Out of Stock**.

Note: You can define both default product inventory settings and global inventory managements settings in the System ➔ Configuration ➔ CATALOG ➔ Inventory.

Categories Product Configuration Page

- 1** Select the **Categories** option in the panel on the left to display the following page:



The screenshot shows a sidebar titled "Product Categories" with a tree view of categories. The categories listed are: Root Catalog (0), Furniture (8), Electronics (42), Apparel (66), Apparel (66) (under Apparel), Shirts (19) (under Apparel), Shoes (46) (under Apparel), Hoodies (1) (under Apparel), Pants (0) (under Apparel), and Household Items (0).

- 2** Specify the Categories to which this product belongs by checking the appropriate checkboxes.

Note: You can assign a product to more than one Category.

Note: You can also assign a product to Categories while editing a Category.

Websites Configuration Page

- 1 Select the **Websites** option in the panel on the left to display the following page:

Main Website	Main Store	English	French	German
<input checked="" type="checkbox"/>	Main Store			
		English		
		French		
		German		

- 2 If your store has more than one website, store or store view, you must assign the product to the appropriate website in order to make it available in this website.

*Note: Sample Data contains three store views. If you want to create a product in the Sample Data environment, you must check the **Main Website** option when creating a product.*

Related Products, Cross-sell and Up-sell Configuration Pages

Each of these pages is similar and enables you to configure relationships between products. The following appears in each of these pages:

<input checked="" type="checkbox"/>	ID	Name	Type	Attrib. Set Name	Status	Visibility	SKU	Price	Position
Yes									

No records found.

- 1 To display all the products in the list, click the **Reset Filter** button.
- 2 Select the relevant checkboxes to assign products. You can use any of the filters available to make it easier to search for the products that you want.

For more information about these pages, you may refer to in *Chapter 8, Promotions* on page 149.

Product Reviews Configuration Page

This page provides a list of reviews posted by customers about a product that is being edited or created. You can use the **Edit** button that appears in each review row to approve, edit or remove the review.

Note: The Pending Reviews RSS link enables you to receive notifications of all pending reviews and enables you to first approve them before they are shown on the site.

Pending Reviews										
ID	Created On	Status	Title	Nickname	Review	Visible In	Type	Product Name	Product SKU	Action
74	Aug 31, 2007 7:01:23 PM	Approved	Amazing	Me	What a cool shirt, i wear it everyday	Main Website Main Store German Main Website Main Store French	Guest	Coalesce: Functioning On Impatience T-Shirt	coal_1	Edit
53	Aug 29, 2007 9:07:46 AM	Approved	Comfortable!!!	Essentl	This is the most comfortable shirt I own... I ...	Main Website Main Store English Main Website Main Store French	Customer	Coalesce: Functioning On Impatience T-Shirt	coal_1	Edit

Product Tags Configuration Page

This page displays the tags assigned to a specific product by customers and how many times each tag was used.

Tag Name	# of Use	Status
	From:	
	To:	
blue	1	Approved
bones	4	Approved
cool t-shirt	1	Approved
emo	1	Approved
Geil	1	Approved
good	1	Approved
green	3	Approved
hip	3	Approved
Hohoho	2	Approved
Hupe	1	Approved
mal	1	Approved

Note: You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.

Customers Tagged Product Page

This page enables you to see which customers have tagged specific products.

First Name	Last Name	Email	Tag Name
John	Doe	john.doe@example.com	bones
John	Doe	john.doe@example.com	t-shirt
John	Doe	john.doe@example.com	hip
John	Doe	john.doe@example.com	mal
John	Doe	john.doe@example.com	young
John	Doe	john.doe@example.com	Test
John	Doe	john.doe@example.com	green
John	Doe	john.doe@example.com	tight
John	Doe	john.doe@example.com	young
John	Doe	john.doe@example.com	pas
John	Doe	john.doe@example.com	good

Note: You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.

Custom Group Configuration Pages

Additional configuration pages may appear depending upon the groups that you have created using the Attribute Sets tool. You may refer to the *Creating Attribute Sets* section on page 86 for more information about Attribute Sets. An example custom group T-Shirts Attribute is shown below:

The screenshot shows a user interface for managing attributes. At the top, there's a dark blue header bar with the text "T-shirts Attributes" on the left and a yellow "Create New Attribute" button with a plus sign on the right. Below the header is a search bar containing the text "Gender ^ Mens". To the right of the search bar is a small dropdown arrow icon. Further to the right is a button labeled "[GLOBAL]".

Fill in the attributes that appear in this page according to the definitions specified in the Attribute Set. Some of these attributes may be mandatory and each may be one of a variety of types according to the definitions of the Attribute Set.

Custom Options Configuration Page

This page enables you to easily create product variants or products that can accept customer input, such as custom imprints or gifts. You may refer to the next section for more information on this topic.

Product Alerts Configuration Page

This page is only available when alerts are enabled from the **System** menu ➔ **Configuration ➔ CATALOG ➔ Catalog** option.

The screenshot shows two separate configuration sections for product alerts:

Price alert subscription was saved successfully

Page 1 of 1 pages | View 20 per page | Total 0 records found

First Name	Last Name	Email	Price	Date Subscribed	Last Notification	Send Count
There are no customers for this alert						

Stock notification was saved successfully

Page 1 of 1 pages | View 20 per page | Total 0 records found

First Name	Last Name	Email	Date Subscribed	Last Notification	Send Count
There are no customers for this alert					

This page displays a list of the customers that have subscribed to each of the alerts and the date on which they were notified about changes.

Product Type Dependent Configuration Pages

Depending upon the product type, additional configuration pages may appear. The following provides a quick review of these types of pages.

Downloadable Products – Downloadable Information Page

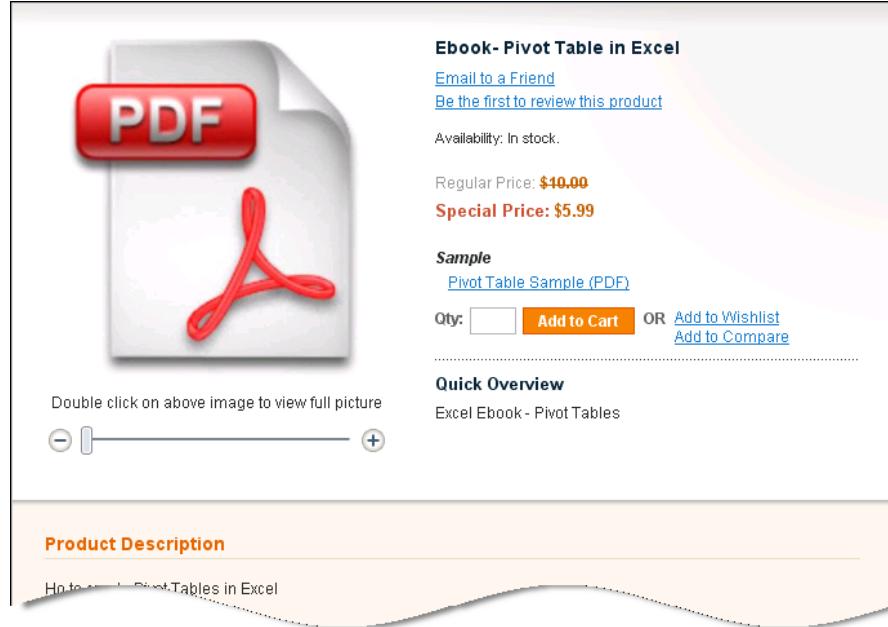
The screenshot shows two configuration pages side-by-side:

- Samples:** This section allows you to add samples for a downloadable product. It includes fields for Title (set to "Samples"), File (with options for File or URL), and Sort Order. Buttons for "Add New Row" and "Upload Files" are available.
- Links:** This section allows you to add links that can be purchased separately. It includes fields for Title (set to "Links"), a dropdown for "Links can be purchased separately" (set to "Yes"), and a "GLOBAL" scope. It also includes fields for Title, Price (USD), Max. Downloads (0), Shareable (Unlimited), Sample (with options for File or URL), and Sort Order. Buttons for "Add New Row" and "Upload Files" are available.

This page contains two sections:

- The **Samples** section enables you to display a sample of the downloadable product on the product's information page. For example, this can be a short sample of a music file, a few pages of an eBook or a trial version of a software application. You can put as many samples as you require by clicking the **Add New Row** button and filling out the fields. You can add files using two methods:
 - Selecting the **File** option, clicking the ... button and then clicking the **Upload Files** button. This will upload the file from your local computer to the server.
- Or
- Selecting the **URL** option and specifying the link to a file that is already on a server in a different location and clicking the **Upload Files** button.

Samples put in the Samples section appear in the store as follows:



- The **Links** section contains the actual products that can be purchased, along with possible samples for them.

The **Links can be purchased separately** option controls whether each of the downloadable products can be purchased by itself or not.

This enables, for example, the tracks of a music CD product to be purchased separately. If you set this option to **Yes**, then you must input the price for each of the downloadable items.

Each of the items also has two options controlling its behavior. The **Max. Downloads** option controls how many times after purchase a product can be downloaded by the customer. The **Shareable** option controls whether after each purchase of the product, the downloadable item is available for download without logging in or if it requires logging in. If the **Shareable** option is set to **Yes**, then customers can click links in the Order confirmation email that they receive in order to get the product. However, this also enables anyone who gets this link to download the product. Setting this option to **Yes** is the only way to enable Guests to checkout (or to enable a comparable quick checkout method, such as PayPal Express or Google Checkout) to download the product. There are configuration settings that must be checked to match your store.

The uploading process is similar to the uploading of the samples, as described above, with the exception of providing an option to tie in samples files for each download product. This feature can be used to provide customers with a short sample of each track of a music CD, for example.

The following shows a product in a store with three links and samples for each of them, for which the setting **Links can be purchased separately** was set to **Yes**.

The screenshot displays a product page for a demo CD. At the top left is a graphic of Earth with orbital paths labeled: Asian Beam (green), Asia Beam (blue), and Ku-Band Beam (orange). To the right of the graphic, the product title "Nusantara Demo" is shown in bold. Below it are links for "Email to a Friend" and a star rating of 2 reviews. The price "\$3.98" is listed, along with "Availability: In stock." and buttons for "Add to Wishlist" and "Add to Compare". A "Quick Overview" section indicates "3 songs demo CD".

Songs ^

<input checked="" type="checkbox"/> Innocent Island (MP3) (sample)	+\$1.99
<input checked="" type="checkbox"/> Good Bye! (MP3) (sample)	+\$1.99
<input type="checkbox"/> Queen of Hearts (MP3) (sample)	+\$1.99

* Required Fields

\$3.98 Qty: **Add to Cart**

Bundle Product – Bundle Items Configuration Page

An example of a bundled product is this Build Your Own Computer offerings found in the demo store:

My Computer

[Email to a Friend](#)
[Be the first to review this product](#)

Availability: In stock.

From: \$635.98
To: \$3,786.70

Price as configured: **\$112.50**

[Add to Wishlist](#) | [Add to Compare](#)

Quick Overview

test description

Double click on above image to view full picture

(-) (+)

Case * Qty: 1

Apevia Black X-Cruiser Case ATX Mid-Tower Case (Default) +\$112.50

CPU * Qty: 0

Choose a selection...

Hard Drive * Qty: 0

Western Digital - 1TB HD - 7200RPM +\$299.25
 Western Digital 500GB HD - 7200RPM +\$224.25
 Seagate 500GB HD - 5400RPM +\$224.25
 Seagate 250GB HD - 5400RPM +\$74.25

Ram * Qty: 0

Crucial 512MB PC4200 DDR2 533MHz Memory +\$74.99
 Crucial 1GB PC4200 DDR2 533MHz Memory +\$113.24
 Crucial 2GB PC4200 DDR2 533MHz Memory +\$149.99

Monitor *

1 x 30" Flat-Panel TFT-LCD Cinema HD Monitor +\$524.99
 1 x 19" Widescreen Flat-Panel LCD Monitor +\$299.99
 1 x 24" Widescreen Flat-Panel LCD Monitor +\$524.99
 1 x 22" Syncmaster LCD Monitor +\$299.99

* Required Fields

Price as configured: **\$112.50** Qty: **Add to Cart**

In Bundled product types, there are also differences in the **General** and **Prices** pages, as follows:

- **SKU Fixed or Dynamic:** Specifies whether the entire product is assigned an SKU based on its components, or is the SKU fixed for the bundle.
- **Weight Fixed or Dynamic:** Specifies whether the entire product's weight is based on the weight of its individual components, or is the weight fixed for the entire bundle.
- **Price View:** Specifies whether the product's price is shown as a range, from the least expensive component to the most expensive (Price Range), or is only the least expensive shown (As Low As).
- **Ship Bundle Items:** Specifies whether individual components are shipped separately or whether the entire product is shipped.
- **Bundle Items:** Bundled Items appear in the store as a list of available options. You can add a new option using the **Add New Option** button. For each option you can configure its title, input type (single and multiple selection fields are available), whether the field is mandatory (for example: it can be **True** for a computer processor and **False** for an additional battery of a laptop computer) and its position on the page.

You can see an example of this in the Backend by viewing the **My Computer ➔ Sample Product ➔ Bundle Items** page.

Name	Default Qty	User Defined Qty	Position	Default
Apevia Black X-Cruiser Case ATX Mid-Tower Case (Default) SKU: apevia-black	1.0000	No	0	<input checked="" type="radio"/>
NZXT Lexa Silver Aluminum ATX Mid-Tower Case (Default) SKU: nzxtlexa	1.0000	No	0	<input checked="" type="radio"/>

Name	Default Qty	User Defined Qty	Position	Default
				<input checked="" type="radio"/>

You can then specify individual values for each option. Click the **Add Selection** button to open a selection area, as shown below:

Please select products to add					
Page <input type="button" value="1"/> of 6 pages View <input type="button" value="20"/> per page Total 102 records found <input type="button" value="Reset Filter"/> <input type="button" value="Search"/> 					
ID	Product Name	Attrb. Set Name	SKU	Price	Qty To Add
166	HTC Touch Diamond	Cell Phones	HTC Touch Diamond	\$750.00	<input type="checkbox"/>
162	Microsoft Wireless Optical Mouse 5000	Default	micronmouse5000	\$59.99	<input type="checkbox"/>
181	Logitech diNovo Edge Keyboard	Default	logidinovo	\$239.99	<input type="checkbox"/>
160	Logitech Cordless Optical Trackman	Default	logitechcord	\$79.99	<input type="checkbox"/>
159	Microsoft Natural Ergonomic Keyboard 4000	Default	microsoftnatural	\$99.99	<input type="checkbox"/>
157	30" Flat-Panel TFT-LCD Cinema HD Monitor	Monitors	M9179LL	\$699.99	<input type="checkbox"/>
156	19" Widescreen Flat-Panel LCD Monitor	Monitors	W1952TQ-TF	\$399.99	<input type="checkbox"/>
155	Seagate 250GB HD - 5400RPM	Hard Drive	250gb5400	\$99.00	<input type="checkbox"/>
154	500GB HD - 5400RPM	Hard Drive	500gb5400	\$299.00	<input type="checkbox"/>

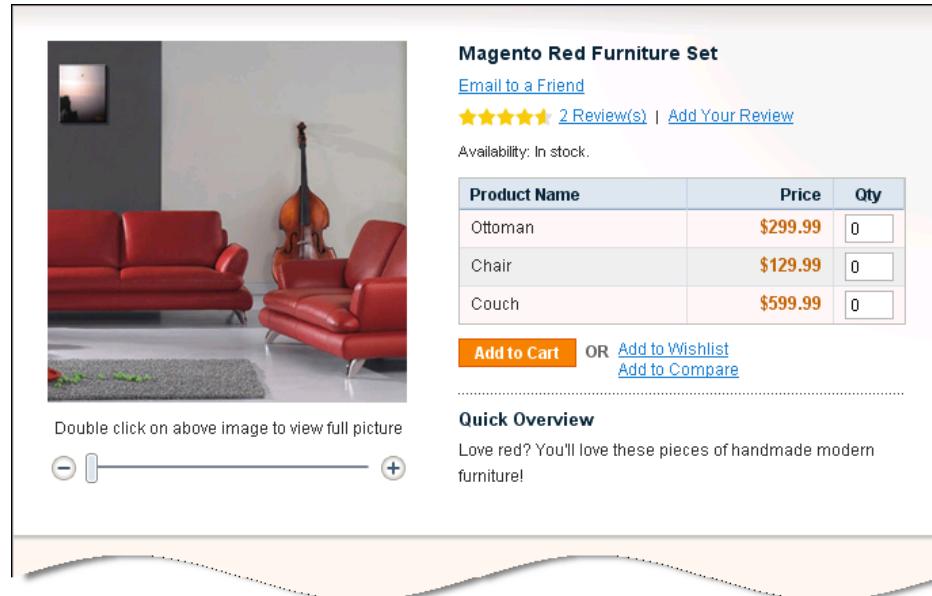
You can select any product that you want using the checkboxes. Click the **Add Selected Product(s) to Option** button to confirm the assignment. For each selection, you can then define the following options:

- **Default Qty:** Specifies the default quantity shown in the product view page.
- **User Defined Qty:** When set to Yes, this option enables customers to enter a quantity for a given selection.
- **Position:** Specifies the Orders of a selection.
- **Default:** Specifies the predefined value.

Grouped Product – Associated Products Configuration Page

A grouped product enables you to purchase each of the items separately.

In the store, a grouped product appears as follows:



The screenshot shows a product page for a 'Magento Red Furniture Set'. On the left, there's a large image of a red leather sofa, a red armchair, and a matching ottoman in a modern interior setting. Below the image is a zoom control: 'Double click on above image to view full picture' with minus and plus icons. To the right, the product title 'Magento Red Furniture Set' is displayed, along with a 'Email to a Friend' link and a 5-star rating with 2 reviews. The availability status 'In stock.' is shown. A table lists the three components with their prices (\$299.99, \$129.99, and \$599.99) and quantity fields (all set to 0). Buttons for 'Add to Cart', 'Add to Wishlist', and 'Add to Compare' are available. A 'Quick Overview' section below the table describes the furniture as 'handmade modern furniture'.

When creating a Grouped Product, the Associated Products page enables you to specify which products are included in a group, as well as the default quantity for each and their position (order) on the page.

<input checked="" type="checkbox"/>	ID	Name	SKU	Price	Default Qty	Position
Yes				From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>
<input checked="" type="checkbox"/>	53	Couch	1113	\$599.99	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	52	Chair	1112	\$129.99	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	51	Ottoman	1111	\$299.99	<input type="text"/>	<input type="text"/>

Note: There is no global price for grouped products. Their price is only controlled by the individual elements that you purchase.

Configurable Product – Associated Products Configuration Page

Configurable products must be associated with simple products using Attributes that a Customer can select from a configurable product page. This means that when a shirt is offered in three sizes, then three simple products must be assigned to the configurable product, one for each size.

The configurable product appears in the store with a section that provides customers with options like the following shown below for **Size**:

The screenshot shows a product page for a "Coalesce: Functioning On Impatience T-Shirt". The main image is a green t-shirt with a white graphic of a ribcage. Below the image is a note: "Double click on above image to view full picture". There are zoom controls (- and +) and a link to "MORE VIEWS" which shows a smaller version of the same image.

Product details:

- Coalesce: Functioning On Impatience T-Shirt**
- [Email to a Friend](#)
- 5 Review(s)** | [Add Your Review](#)
- Availability: In stock.
- \$15.00**
- [Add to Wishlist](#) | [Add to Compare](#)

Quick Overview

- 6.1 oz. 100% preshrunk heavyweight cotton
- Shoulder-to-shoulder taping
- Double-needle sleeves and bottom hem

Size *

Choose option...
Choose option...
Small
Medium
Large

\$15.00 Qty: **Add to Cart**

This is the most complex configuration page and it is described below it in three stages.

Create Simple Associated Product

This section enables you to create simple products along with the configurable product.



Click the **Create Empty** button to open a popup window with a regular product creation page, but that has a preselected product type, **Simple Product**, and an Attribute Set that is the same as the configurable product.

The **Copy from Configurable** button works in a very similar manner to the above, but it pre-fills many of the fields with information from the configurable product, as shown below.

A screenshot of a "Quick simple product creation" form. It includes fields for Name (Coalesce: Functioning On Impatience T-Shirt), SKU (coal_1), Weight, Status (Please Select), Visibility (Please Select), Shirt Size, Qty (0), Stock Availability (In Stock), and an "Autogenerate" checkbox. A "Quick Create" button is at the bottom.

This area enables you to quickly create simple products without filling in all the information. Fill in the required fields and click the **Quick Create** button to create this product. The **Auto generate** option enables Magento to select the **Name** and **SKU** based on the Attributes.

Super Product Attributes Configuration

This section enables you to specify the Attribute Name that appears in the store for selection and the price for each of the options. Two price options are provided:

Fixed or Percentage.

The screenshot shows a configuration interface for product attributes. At the top, a message box contains two green notices: "Price values for options should be specified in system base currency." and "Attribute names can be specified per store." Below this is a table for defining attribute prices. The table has columns for "Shirt Size" (with dropdown arrows), "Attribute Name" (set to "Size"), and three rows for "Option: Small", "Option: Medium", and "Option: Large". Each row has a "Price:" field and a "Fixed" dropdown menu.

Shirt Size	Attribute Name:	Size
Option: Small	Price:	Fixed
Option: Medium	Price:	Fixed
Option: Large	Price:	Fixed

The price for configurable products is a combination of the price from the Price Configuration page, as described in the *Prices Product Configuration Page* section on page 94 and the values entered in this area. This means that if the configurable product's price is \$20 and the price for the Medium option is: Percentage and 10, then this variation of the product costs \$22. The price of the associated products is not used for calculation.

The screenshot shows a grid of product records. The columns are: ID, Name, Attrb. Set Name, SKU, Price, Inventory, Shirt Size, and Action. The first row is a header with filters. The data rows are:

ID	Name	Attrb. Set Name	SKU	Price	Inventory	Shirt Size	Action
35	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_sm	\$15.00	In Stock	Small	Edit
117	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_md	\$15.00	In Stock	Medium	Edit
118	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_lrg	\$15.00	In Stock	Large	Edit

Completing the Product Wizard

Click the **Save** or **Save and Continue Editing** button in the top right corner of the page. If you choose the latter, after saving the product you are redirected back to its page.

► To edit an existing product:

- From the **Catalog** menu, select the **Manage Products** option to display a list of products, as shown below:

ID	Name	Type	Attrb. Set Name	SKU	Price	Qty	Visibility	Status	Websites	Action
Any	From:				From:	From:				Reset Filter
To:					To:	To:				Search
					In:	USD				Submit
<input type="checkbox"/>	45 Argus QC-2185 Quick Click 5MP Digital Camera	Simple Product	Cameras	QC-2185	\$37.49	120	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	46 Olympus Stylus 750 7.1MP Digital Camera	Simple Product	Cameras	750	\$161.94	932	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	156 19" Widescreen Flat-Panel LCD Monitor	Simple Product	Monitors	WV1952TQ-TF	\$399.99	453	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	147 22" Syncmaster LCD Monitor	Simple Product	Monitors	226bw	\$399.99	385	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	152 24" Widescreen Flat-Panel LCD Monitor	Simple Product	Monitors	WV2452T-TF	\$699.99	504	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	157 30" Flat-Panel TFT-LCD Cinema HD Monitor	Simple Product	Monitors	M9179LL	\$699.99	563	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	26 Acer Ferrari 3200 Notebook Computer PC	Simple Product	Computer	LXFR206.001	\$1,799.99	11	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	41 Aiko Dresser	Simple Product	Furniture	38482Z	\$399.99	339	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	440 AMD A6-3020 3.8GHz OEM	Simple Product	CPU	amda64	non.no	303	Catalog, Search	Enabled	Main Website	Edit

- Click the **Edit** link on the right side of the row of the relevant product.

Mass-Changing Products

Magento provides various features that enable changes to be made on multiple products or their properties. On the product list, mark products using the selection checkboxes. Then select one of the actions from the **Actions** dropdown field and click the **Submit** button:

- Delete:** Deletes the selected products from the store.
- Change Status:** Disables or enables multiple products at once.
- Update Attributes:** Updates the attributes of multiple products. When you click the **Submit** button, a new page opens containing a list of all attributes for all selected products. You can change any of the attributes and then select the **Change** field to notify Magento as to which of the attributes have been updated. Click **Save** to confirm the changes.

Creating Variations of a Product

This section describes how to create variations of a product by adding input controls (input options) to a product's page. An example of the variation of a product is the same product with different colors or sizes. In this case a customized field must be added by you to enable the customer to select the required color or size.



Tip: If you want to track the quantity that is sold of each variant of the product, you must create a separate product for each variant of the product and group them in the product of type Configurable, and not use the variations options described here.

► To create variations of a product:

- 1 From the **Catalog** menu, select the **Manage Products** option to display a list of products.
- 2 Click the **Add Product** button to create a new product or click the **Edit** link to the right of the relevant product to open the edit page.
- 3 Select **Custom Options** on the bottom left of this page to display the following:

Custom Options			
Title *	Input Type *	Is Required	Sort Order

- 4 Click the **Add New Options** button on the top right of this page to display the following:

Custom Options			
Title *	Input Type *	Is Required	Sort Order
<input type="text"/>	<input type="button" value="-- Please select --"/> <input type="button" value="-- Please select --"/>	<input type="button" value="Yes"/>	<input type="button"/>

- 5 In the **Title** field, specify a name for this new property, such as the name **Size**.
- 6 In the **Input Type** field, select the type of input that can be given in this field, such as text or dropdown menu, as shown above.
- 7 In the **Is Required** field, select **Yes** to indicate that this is a mandatory field, meaning that a customer must select an option in this field in order to purchase this specific product.

- 8 If there is more than one option, then specify the order in which this option appears in the **Sort Order** field. **1** indicates that it appears first.
- 9 Click the **Add New Row** button to display the following row in which you can define the new variation of this product. For example, the product in a certain size and its corresponding price.

Title	Input Type	Is Required	Sort Order														
Size	Drop-down	Yes	1	<table border="1"> <thead> <tr> <th>Title</th> <th>Price</th> <th>Price Type</th> <th>SKU</th> <th>Sort Order</th> </tr> </thead> <tbody> <tr> <td>XL</td> <td>10</td> <td>Fixed</td> <td>shirt-xl</td> <td>1</td> </tr> </tbody> </table>				Title	Price	Price Type	SKU	Sort Order	XL	10	Fixed	shirt-xl	1
Title	Price	Price Type	SKU	Sort Order													
XL	10	Fixed	shirt-xl	1													
<input type="button" value="Add New Row"/>																	

- 10 In the **Title** field, specify the name of this variation of the product, such as **Size XL**.
- 11 All the prices in these rows are relative to the price of this product as defined in the **Prices** page of the product wizard described on page 94. In the **Price Type** field, select one of the following options:
 - **Fixed:** To specify that the price of this variation of the product differs from the price of the base product by a fixed monetary amount, such as **\$1**.
 - **Percentage:** To specify that the price of this variation of the product differs from the price of the base product by a percentage, such as **10%**.
- 12 In the **Price** field, specify the difference between the price of this variation of the product and the price of the base product. Specify a fixed amount or a percentage according to the value that you entered in the **Price Type** field. You can also enter negative values.
- 13 In the **SKU** field, specify the SKU for this variation of the product.
- 14 If there is more than one variation, then specify the order in which this option appears in the **Sort Order** field. **1** indicates that it appears first.

15 Click the **Save** button. This example product is shown in the web store, as shown below:

Zolof The Rock And Roll Destroyer: LOL Cat T-shirt
★ ★ ★ ★ 2 Review(s) | Add Your Review
Availability: In stock.
\$13.50
Buy 5 for \$12.50 each and save 8%
Buy 10 for \$11.50 each and save 15%
Buy 20 for \$9.50 each and save 30%
[Add to Wishlist](#) | [Add to Compare](#)

Quick Overview
Printed on American Apparel Classic style 5495 California t-shirts.

Double click on above image to view full picture
MORE VIEWS

Size *
Medium

Color *
Choose option...
Choose option...
Green +\$5.25
Red

\$13.50
Qty: **Add to Cart**

In this example, you can see that the price is **\$13.50**. However, if the **Green color** is selected, then the price is **\$18.75**, as shown below:

Size *
Small

Color *
Green

* Required Fields

\$18.75
Qty: **Add to Cart**

Note: If this product is added to the customer's shopping cart, then the variation information appears there, as shown below:

Remove	Product Name	Unit Price	Qty	Subtotal
	 Zolo The Rock And Roll Destroyer: LOL Cat T-shirt Size Small Color Green	\$18.75	<input type="text" value="1"/>	\$18.75

[Continue Shopping](#) [Update Shopping Cart](#)

6 Preparing to Sell

This chapter describes how to prepare your web store to start selling products by defining tax charges and defining how products are shipped and money is accepted. This chapter contains the following sections:

- **Taxes**, page 121
- **Shipping**, page 127
- **Payment**, page 132

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 below.

Each type of customer can be assigned a class when you define them and each product is assigned a tax class. For a description of how to define a customer, you may refer to the *Adding a Customer* section on page 176. For a description of how to define a product, you may refer to the *Creating a New Product* section on page 91.

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).

General Taxation Settings

► To configure general taxation settings:

- 1 From the **System** menu, select the **Configuration** option.
- 2 From the **SALES** section in the panel on the left, select **Tax**.
- 3 Expand the **Tax Classes** section, and in the **Tax Class for Shipping** field, specify the tax class charged on the shipping amount, as shown below. With Sample Data populated, we have added three examples of Tax Classes for Shipping. If your store changes additional tax on shipping expenses then you should designate the Product Tax Class that will apply to Shipping. More information on configuring these rules can be found ahead.



- 4 Expand the **Calculation** section, as shown below:



- 5 In the **Tax Based On** field, specify the shipping address, billing address or shipping origin.
- 6 In the **Catalog prices include tax** field, specify if the prices entered for products are net (No) or gross (Yes).
- 7 In the **Shipping prices include tax** field, specify if the prices entered for shipping are net (No) or gross (Yes).

- 8 In the **Apply Tax After Discount** field, specify whether tax is applied to the original or discounted price.
- 9 Expand the **Default Tax Origin Calculation** section to specify which country is used by Magento as the default for tax calculation, as shown below:

Default Tax Origin Calculation	
Default Country	<input type="text" value="United States"/>
Default State	<input type="text" value="*"/>
Default Post Code	<input type="text" value="*"/>

*Note: If you set the **Display Product Prices** field to **Including Tax** in the **Display** section described below, then the tax is only displayed if there is a Tax Rule matching the tax origin or if Magento detects that the customer address matches the Tax Rule (which happens after a customer creates an account, logs in or uses the Tax and Shipping estimation tool in the cart).*

- 10 Expand the **Display** section to specify how taxes and prices are shown for products and in a cart according to the requirements (legal and otherwise) of your store, as shown below:

Display	
Display Cart/Order Prices	<input type="text" value="Excluding tax"/>
Display full tax summary	<input type="text" value="No"/>
Display Shipping Prices	<input type="text" value="Excluding tax"/>
Display Product Prices	<input type="text" value="Excluding tax"/>
Display Zero Tax Subtotal	<input type="text" value="No"/>

In the Fixed Product Taxes 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.

*Note: To assign a fixed tax to a product, create an Attribute with the Catalog Input Type for Store Owner set to **Fixed Product Tax**, and assign this Attribute to a product.*

Product Tax Class

► To define a product tax class:

- 1 From the **Sales** menu, select the **Tax** option and then the **Product Tax Class** option to display the following page, which shows a list of the previously defined product tax classes.

Class Name	default	Shipping	Taxable Goods
default			
Shipping			
Taxable Goods			

- 2 Click the **Add New** button to display the following page:

Product Tax Class Information	
Class Name *	My Tax Class

- 3 In the **Class Name** field, enter a name for this tax class.

*Note: You can apply a tax class to a product by editing the product and choosing the appropriate option on the **Prices** tab.*

- 4 Click the **Save Class** button.

Customer Tax Class

► To define a customer tax class:

- 1 From the **Sales** menu, select the **Tax** option and then the **Customer Tax Classes** option to display a list of the previously defined customer tax classes.
- 2 Click the **Add New** button to display the following page:

Customer Tax Class Information	
Class Name *	Wholesale Tax

- 3 In the **Class Name** field, enter a name for this tax class.

Note: You can link a Customer's tax class to a Customer group by editing a Customer group. You can then assign this Customer group when creating or editing a Customer.

- 4 Click the **Save Class** button.

Tax Zones and Rates

► To define tax zones and rates:

- From the **Sales** menu, select the **Tax** option and then the **Manage Tax Zones and Rates** option to display a list of the previously defined tax zones and rates.

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
US-CA-*-Rate 1	All countries			8.25
US-NY-*-Rate 1	United States	CA	*	8.375

- Click the **Add New Tax Rate** button to display the following page:

The screenshot shows the 'Add New Tax Rate' form. It consists of two main sections: 'Tax Rate Information' and 'Tax Titles'.
In the 'Tax Rate Information' section, there are five fields:

- Tax Identifier ***: A text input field containing 'US-CA-*'.
- Country ***: A dropdown menu set to 'United States'.
- State ***: A dropdown menu set to 'CA'.
- Zip/Post Code**: An input field containing '*'.
- Rate ***: An input field containing '0.0000'.

In the 'Tax Titles' section, there are three language tabs: English, French, and German. Each tab has an input field below it. A note at the bottom states: 'Note: Leave empty to use tax identifier'.

- In the **Tax Identifier** field, enter a unique name for this tax. Do not use spaces. This identifier is not shown in the web store if the **Tax Titles** section is filled in, as described below.
- Enter the **Country** and **State** fields.
- In the **Rate** field, specify the percentage of tax.
- In the **Tax Titles** section, enter the name of this tax.
- Click the **Save Rate** button.

Tax Management Rules

► To define Tax Management Rules:

- 1 To define how taxes are charged, from the **Sales** menu, select the **TAX** option and then the **Manage Tax Rules** option to display a list of the previously defined tax rules, as shown below:

The screenshot shows a table titled "Manage Tax Rules" with the following data:

Name	Customer Tax Class	Product Tax Class	Tax Rate	Priority	Sort Order
Retail Customer-Taxable Goods-Rate 1	Retail Customer	Taxable Goods	US-CA-*-Rate 1, US-NY-*-Rate 1	1	1
Retail Customer-default-Rate 1	Retail Customer	default	US-CA-*-Rate 1, US-NY-*-Rate 1	1	1

Each tax rule is comprised of a **Customer Tax Class**, **Product Tax Class** and **Tax Rate**.

- 2 To define a new tax rule, click the **Add New Tax Rule** button to display the following page:

The screenshot shows a form titled "Edit Rule" with the following fields:

Tax Rule Information	
Name *	Retail Customer-default-Rate 1
Customer Tax Class *	Retail Customer
Product Tax Class *	default Taxable Goods Shipping
Tax Rate *	US-CA-*-Rate 1 US-NY-*-Rate 1
Priority *	1
Sort Order *	1

A note at the bottom states: "Tax rates at the same priority are added, others are compounded."

- 3 Select a **Customer Tax Class**, **Product Tax Class** and **Tax Rate** in the relevant fields. This rule defines that the **Tax Rate** you select is applied to the Customers in the selected **Customer Tax Class** and the Products in the selected **Product Tax Class**.

- 4** In the **Tax Priority** field, specify 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 a different priority apply then the taxes are compounded.



***Tip:** When numerous taxes must be defined, you can ease the process by importing them from a spreadsheet. From the **Sales** menu, select the **Tax** option and then the **Import/Export Tax Rates** option.*

Shipping

A variety of shipping rates are available for selection in Magento. This section describes a few of these shipping rate options for your web store.

General Shipping Settings

► **To configure general shipping settings:**

- 1** From the **System** menu, select the **Configuration** option.
- 2** From the **SALES** section in the panel on the left, select **Shipping Settings**.
- 3** Expand the **Origin** section and specify the address used for shipping calculations. Typically, this is the warehouse address from which products are shipped, as shown below:

Country	United States
Region/State	California
ZIP/Postal Code	90034
City	

- 4** Expand the **Options** section, as shown below:

Allow Shipping to multiple addresses	Yes
Maximum qty allowed for Shipping to multiple addresses	100

- 5** In this section, enable or disable shipping to multiple addresses. Shipping to multiple addresses is very useful for stores that sell gifts. It enables customers to send various parts of an Order to different destinations.

Flat Shipping Rates

A flat shipping rate refers to a fixed predefined cost for shipping which can be applied per item or per Shipment according to your preferences.

► **To define flat shipping rates:**

- 1** From the **System** menu, select the **Configuration** option.
- 2** From the **SALES** section in the panel on the left, select **Shipping Method**.
- 3** Expand the **Flat Rate** section to define a fixed predefined amount for shipping, as shown below:

Shipping Methods Save Config

Flat Rate	
Enabled	<input type="text" value="Yes"/>
Title	<input type="text" value="Flat Rate"/>
Method name	<input type="text" value="Fixed"/>
Type	<input type="text" value="Per Item"/>
Price	<input type="text" value="5.00"/>
Calculate Handling Fee	<input type="text" value="Fixed"/>
Handling Fee	<input type="text"/>
Displayed Error Message	<p>This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.</p>
Ship to applicable countries	<input type="text" value="All Allowed Countries"/>
Ship to Specific countries	<input type="text" value="Afghanistan
Aland Islands
Albania
Algeria
American Samoa
Andorra
Angola
Anguilla
Antarctica
Antigua and Barbuda"/>
Sort order	<input type="text"/>



Tip: Magento also provides the option to specify table rates by expanding the **Table Rates** section. This enables you to define shipping rates by Weight, Destination, Price, the Number of Items and various combinations of these Categories. The table rates are entered by importing a CSV file. You may refer to <http://www.magentocommerce.com/knowledge-base/entry/how-do-i-set-up-table-rate-shipping> for more information.

- 4 In the **Enabled** field, select **Yes**. The flat rate method then appears as an option in the shopping cart and on the shipping page during the checkout.
- 5 The contents of **Title** and **Method name** fields appear as follows in the web store:

The screenshot shows the Magento checkout progress with steps 1 through 6 listed on the left. Step 4, 'Shipping Method', is highlighted with an orange arrow pointing to it. In the main content area, under 'Flat Rate', the 'Fixed \$5.00' option is selected. Below the form are 'Back' and 'Continue' buttons. To the right, 'YOUR CHECKOUT PROGRESS' shows billing and shipping addresses, and a sidebar lists shipping and payment methods.

Note: Some Shipping Methods, such as UPS provide a variety of shipping methods to choose from.

- 6 In the **Type** field, specify the entity to which the shipping fee applies, such as **Per Item**. In this case, the shipping fee is dependent on the number of items shipped. If you set the rate to be per item, it is multiplied by the total quantity of items in the shopping cart. If you have two of the same item or two different items, then the rate is the same. You can also select **Per Order** in this field.

- 7** In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that the appropriate (and different) shipping rates are applied to the relevant countries, as shown below:



Tip: Hold down Ctrl key while clicking options to select multiple countries.

- 8** In the **Sort Order** field, specify the position of this shipping method in relation to the other shipping methods offered to the customer.

Online Rates

Apart from static options like flat or table rates, Magento also offers dynamic retrieval of rates from various products, such as UPS, USPS, FedEx, DHL and so on.

Note: Most shipping providers require that you open an account with them. Consult your shipping provider for details on how to obtain API credentials.

The configuration of this method is very similar to the configuration of a Flat Rate, as described above. The exact options depend on the service provider.

For example, UPS rates can appear as follows in your web store:

The screenshot shows the Magento checkout process at step 4: 'Shipping Method'. The left sidebar lists steps 1 through 6. The main area shows shipping options for United Parcel Service (UPS) and a Flat Rate. The 'Flat Rate' section includes a 'Fixed \$5.00' option. At the bottom are 'Back' and 'Continue' buttons. To the right, a sidebar titled 'YOUR CHECKOUT PROGRESS' shows 'Billing Address' and 'Shipping Address', both set to 'Test Customer' with address details: Test Street 1, Test Street 2, Test City, California, 90123, United States, T: 123-123-1234. Below this are sections for 'Shipping Method' and 'Payment Method'.

Offering Free Shipping



Tip: Free shipping per product can be defined as a shopping cart price rule. You may refer to the Chapter 8, Promotions on page 149 for more information. This option enables you to set up free shipping that is only valid when a customer enters the appropriate discount code.

► To define free shipping:

- 1 From the **System** menu, select the **Configuration** option.
- 2 Select the **SALES** section in the panel on the left, select **Shipping Methods**.
- 3 Expand the **Free Shipping** section to enable free shipping with optional minimum order amount, as shown below:

The screenshot shows the 'Free Shipping' configuration screen. It includes fields for enabling the method, setting a title and method name, specifying a minimum order amount, and defining a displayed error message. It also includes dropdowns for selecting countries and a scrollable list of specific countries.

Free Shipping	
Enabled	No
Title	Free Shipping
Method name	Free
Minimum order amount	
Displayed Error Message	This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.
Ship to applicable countries	All Allowed Countries
Ship to Specific countries	Afghanistan Aland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda
Sort order	

- 4 In the **Enabled** field select **Yes** to enable the method.
- 5 In the **Minimum order amount** field specify the amount for an Order over which shipping is provided free of charge.

- 6** In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that free shipping is only applied to the relevant countries or you can select the **All Allowed Countries** to specify that free shipping is available for users from all countries.

Acquiring Additional Shipping Modules



Tip: Numerous other shipping modules are provided at <http://www.magentocommerce.com/magento-connect> and new ones are uploaded often. More information on installing shipping extensions is provided in the *Extending Magento* section on page 207.

Payment

Now that you have a method to calculate the cost of the shipping of your products, you can configure the payment options that enable the collection of money. Magento offers several payment options and many more can be added by downloading Magento payment module extensions, provided at <http://www.magentocommerce.com/magento-connect>. More information on installing payment module extensions is provided in the *Extending Magento* section on page 207.

The following shows how to set up some of the most popular payment methods. Setting up other options is just as simple.

► **To define payments:**

- 1 From the **System** menu, select the **Configuration** option.
- 2 From the **SALES** section in the panel on the left, select **Payment Methods** to display the following page:

Payment Method	Action
Saved CC	▼
Zero Subtotal Checkout	▼
Check / Money order	▼
Purchase order	▼
Authorize.net	▼
Payflow Pro	▼
PayPal Express Checkout	▼
PayPal Website Payments Pro - Direct Payments	▼
PayPal Website Payments Standard	▼
PayPal Website Payments Pro (Payflow Edition) - Express Checkout	▼
PayPal Website Payments Pro (Payflow Edition) - Direct Payments	▼

A few payment options are described as follows.

PayPal

PayPal is one of the most basic ways to accept online payments. It enables you to accept credit cards and PayPal accounts.

► **To setup payment by PayPal:**

- 1 Your first step is to create a PayPal business account. Please check with PayPal (www.paypal.com) for detailed instructions.
- 2 In the Magento backend, in the **System** menu, select the **Configuration** option.
- 3 Under the **SALES** section select the **PayPal Accounts** option.

- 4** Expand the **Website Payments Standard** section and specify your business name and the email to use for your web store's PayPal account, as shown below:

The screenshot shows the 'Website Payments Pro (Payflow Edition)' configuration interface. The 'Website Payments Standard' section is expanded, displaying the following fields:

- Business Name: The Magento Store
- Business Account: paypal@magentostore.com
- Paypal Logo Image URL: (empty field with note: Maximum image size is 750x90 px.)
- Sandbox Flag: No
- Debug Flag: No

- 5** From the **Sales → Payment Method** section expand the **PayPal Website Payments Standard** configuration, as shown below:

The screenshot shows the 'PayPal Website Payments Standard' configuration screen. The following settings are visible:

- Enabled: Yes
- Title: Paypal Standard
- Payment Action: Authorization
- Type: Instant Payment Notification (IPN)
- New order status: -- Please Select --
- Transaction Type: Aggregate Order
- Payment from applicable countries: All Allowed Countries
- Payment from Specific countries: A dropdown menu listing various countries including Afghanistan, Aland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda.
- Sort order: (empty field)

- 6** In the **Enabled** field, select **Yes**.
- 7** In the **Title** field, specify a title to be shown to your customers.

- 8** In the **Payment Action** field, select one of the following options:
- **Authorization:** Blocks or holds funds in the PayPal account until these funds have been transferred to your account. This usually occurs when you process the Order.
 - **Sale:** Specifies that funds are transferred to your account immediately.

Saved Credit Cards

Select the **SALES** option in the panel on the left and then select the **Payment Methods** option.

Expand the **Saved CC** section to define credit cards, as shown below:

Saved CC	
Enabled	Yes
Title	Credit Card (saved)
New order status	Pending
Credit Card Types	American Express Visa Master Card Discover Switch/Solo Other
Credit Card Verification	No
Payment from applicable countries	All Allowed Countries
Payment from Specific countries	Afghanistan Aland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda
Minimum Order Total	
Maximum Order Total	
Sort order	

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.



Tip: When using the Credit Cards payment method it is highly recommended to configure an SSL certificate for your web store.

Note: Saving customer card data is discouraged unless necessary. Even though the data is encrypted it still poses a security risk to hold this information.

This option appears as follows in the web store:

The screenshot shows the 'Payment Information' step of a Magento checkout process. On the left, a vertical navigation bar lists steps 1 through 6: Checkout method, Billing Information, Shipping Information, Shipping Method, and Payment Information (which is highlighted with a yellow background). To the right of the navigation is a large form area. At the top of the form, there are radio buttons for 'Check / Money order' and 'Credit Card (saved)', with 'Credit Card (saved)' being selected. Below these are fields for 'Name on Card *' (a text input field), 'Credit Card Type *' (a dropdown menu with 'Please Select--'), 'Credit Card Number *' (a text input field), 'Expiration Date *' (a dropdown menu for 'Month' and a dropdown menu for 'Year'), and 'Card Verification Number *' (a text input field with a 'What is this?' link). To the right of the form is a sidebar titled 'YOUR CHECKOUT PROGRESS' containing four sections: 'Billing Address | Change' (with details: Test Customer, Test Street 1, Test Street 2, Test City, California, 90123, United States, T: 123-123-1234), 'Shipping Address | Change' (with details: Test Customer, Test Street 1, Test Street 2, Test City, California, 90123, United States, T: 123-123-1234), 'Shipping Method | Change' (with 'Flat Rate - Fixed \$5.00'), and 'Payment Method' (which is currently empty). At the bottom of the form, there are links for 'Back' and 'Continue'.

Customers that place an Order in your web store, see their card details as follows. You may refer to *Chapter 9, Managing Orders and Customers* on page 175 for more information about Orders in Magento.

The screenshot shows a summary of payment information. It features a dark blue header bar with the text 'Payment Information'. Below the header is a white content area containing the following details:
Name on the Card: FirstName LastName
Credit Card Type: Visa
Credit Card Number: 4111111111111111
Expiration Date: 12/2010
Order was placed using USD



Tip: You can use the following test credit card number to practice purchasing in your web store:

Visa 4111111111111111

MasterCard 5555555555554444

American Express 378282246310005

Use any expiration date in the future and as the CVV/CVC/verification code use 123 or 000

Checks and Money Orders

This payment method is enabled by default in the Sample Data. Expand the **Check/Money Order** section to define how checks and money orders are accepted in your web store, as shown below:

The screenshot shows the 'Check / Money order' configuration screen. The 'Enabled' dropdown is set to 'Yes'. The 'Title' is 'Check / Money order'. The 'New order status' is 'Pending'. The 'Payment from applicable countries' dropdown is set to 'All Allowed Countries', which is expanded to show a list of countries: Afghanistan, Aland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda. The 'Make Check payable to' field contains 'TestCompany'. The 'Send Check to' field contains 'Test Address 1', 'Test Address 2', 'Test City, CA 90456', and 'United States of America'. The 'Minimum Order Total' and 'Maximum Order Total' fields are empty. The 'Sort order' field is also empty.

In the **Make Check payable to** field, specify the name of the entity to which the checks must be made out.

This option appears as follows in the web store:

The screenshot shows the Magento checkout process at step 5: Payment Information. An orange arrow points from the left towards the payment method selection area. The payment method selected is "Check / Money order". The form includes fields for the check recipient ("Make Check payable to: TestCompany") and the address where it should be sent ("Send Check to: Test Address 1, Test Address 2, Test City, CA 90456, United States of America"). There is also an option for "Credit Card (saved)". Below the form are "Back" and "Continue" buttons. To the right, a sidebar titled "YOUR CHECKOUT PROGRESS" lists the steps: Billing Address, Shipping Address, Shipping Method, and Payment Method. Each step has a "Change" link. The Billing Address section shows a test customer with the address: Test Street 1, Test Street 2, Test City, California, 90123, United States, T: 123-123-1234. The Shipping Address section shows the same test customer with the address: Test Street 1, Test Street 2, Test City, California, 90123, United States, T: 123-123-1234. The Shipping Method section shows "Flat Rate - Fixed \$5.00".

Acquiring Additional Payment Modules



Tip: Numerous other payment modules are provided at <http://www.magentocommerce.com/magento-connect> and new ones are uploaded often. More information on installing extensions is provided in the **Extending Magento** section on page 207.

7 Design and Content

This chapter describes how to customize the look-and-feel of your web store by applying easy to use options that are provided in the Magento backend. This chapter contains the following sections:

- **Overview**, page 139
- **Changing the Web Store's Default Theme**, page 140
- **Managing CMS Pages**, page 144
- **Customizing Transactional Emails**, page 147

Overview

Magento provides a variety of simple-to-use design options that enable you to apply your own customized look-and-feel to your Magento web store with basic HTML knowledge.



Advanced Tip: You may refer to http://www.magentocommerce.com/design_guide for a description of how interfaces, themes, skins, layouts and blocks are used and to gain access to resources that will assist in their implementation.

Changing the Web Store's Default Theme



Advanced Tip: To design your own theme, you may refer to the Magento Designers Guide at http://www.magentocommerce.com/design_guide.

► To change your web store's default theme:

- 1 Access one of the numerous free and commercial themes provided at <http://www.magentocommerce.com/magento-connect>. New ones are uploaded often. At the time of writing this guide, over 180 themes were available.
- 2 Click on the **Themes** link to filter the extensions to themes.
- 3 Click on the **Core** link to select one of the themes provided by Varien, the Magento company. The themes are then listed in the center of the page, as shown below:

The screenshot shows the Magento Connect interface. At the top, there are navigation links: Product, Services, Support, Resources, Downloads, Partners, Company, Blog, Community, and Magento Connect. A red bar indicates "607 users online". Below the navigation, the URL is Home > Magento Connect > All Extension. The main content area is titled "Magento Connect | Themes | Core". On the right, there are filters for "New Extensions | Search Match", "EXPLORE MAGENTO CONNECT", "Browse extensions by | View all", "CATEGORY: Themes", "TYPE: Core", and "Stability". Under "POPULAR TAGS", there are links like shelf, AU, template, money, callout, Serbia, theme, payment, interface, plus, shipping, locale, community, dark, payer, Albania, shipping, uk, eu, worldwide, royalmail, multiple, tableters, cav, extensible, Albanian, store, language. The central list displays three themes:

- Modern Theme**
This is a new alternative theme to the Magento default interface.
[More Info ▶](#)
Version 1.2.1 last uploaded Mon, February 2, 2009
By [Magento Core](#)
42 votes
39787 Downloads
94 Reviews
- Blank Theme**
This is a sample skeleton theme for Magento designers.
[More Info ▶](#)
Version 1.2.1 last uploaded Mon, February 2, 2009
By [Magento Core](#)
26 votes
15082 Downloads
30 Reviews
- mCommerce - iPhone Optimized Theme**
This is a new iPhone optimized theme to the Magento default interface.
[More Info ▶](#)
Version 1.2.1 last uploaded Mon, February 2, 2009
By [Magento Core](#)
14 votes
8084 Downloads
17 Reviews

- 4 Install the theme as any other Magento extension. You may refer to the *Extending Magento* section on page 207 for more information.
- 5 You can now activate this theme so that the web store appears with a new layout. From the **System** menu, select the **Configuration** option.

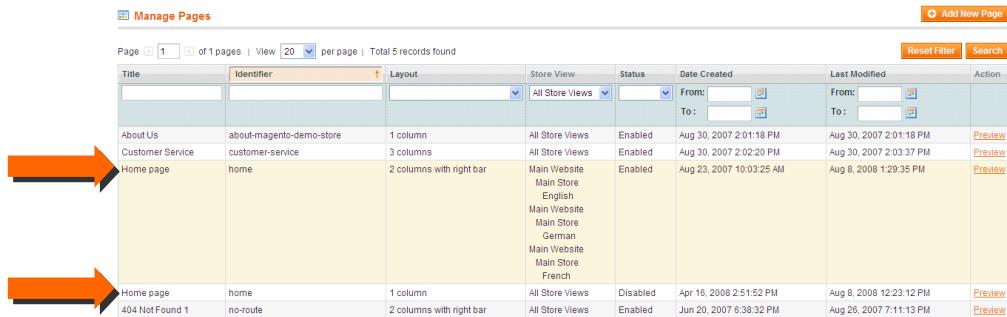
- 6** In the **GENERAL** area in the panel on the left, select the **Design** option and expand the **Themes** section. The following page is displayed:

The screenshot shows the 'Design' configuration page. At the top, there's a 'Save Config' button. Below it, the 'Themes' section is expanded, showing fields for 'Translations', 'Templates', 'Skin (Images / CSS)', 'Layout', and 'Default'. Each field has an 'Add Exception' button below it. A note says: 'Match expressions in the same order as displayed in the configuration.' Below the themes section, other sections like 'HTML Head', 'Header', 'Footer', and 'Product Image Watermarks' are listed with their own dropdown arrows.

Tip: The **Add Exception** option enables you to define special themes displayed for users using specific browsers. An example is showing an iPhone optimized theme for users using this device to browse the store.

- 7** In the **Themes** section in the **Default** field, specify the name of the theme. In this case it is called **Modern**.
- 8** Click the **Save Config** button on the top right of the page. The header, footer, menu bar and background of the frontend now look different according to the new theme.

- 9** If your home page appears incorrect, it may be because the layout that you selected is suited to two columns when your home page has one column or vice versa. For the **Modern** theme, the following change must be applied so that that the frontend home page appears properly. From the **CMS** menu, select the **Manage Pages** option to display the following page:



Manage Pages								Add New Page	
Title	Identifier	Layout	Store View	Status	Date Created	Last Modified	Action	Reset Filter	Search
About Us	about-magento-demo-store	1 column	All Store Views	Enabled	Aug 30, 2007 2:01:18 PM	Aug 30, 2007 2:01:18 PM	Preview		
Customer Service	customer-service	3 columns	All Store Views	Enabled	Aug 30, 2007 2:02:20 PM	Aug 30, 2007 2:03:37 PM	Preview		
Home page	home	2 columns with right bar	Main Website Main Store English Main Website Main Store German Main Website Main Store French	Enabled	Aug 23, 2007 10:03:25 AM	Aug 8, 2008 1:29:35 PM	Preview		
Home page	home	1 column	All Store Views	Disabled	Apr 16, 2008 2:51:52 PM	Aug 8, 2008 12:23:12 PM	Preview		
404 NotFound 1	no-route	2 columns with right bar	All Store Views	Enabled	Jun 20, 2007 6:38:32 PM	Aug 26, 2007 7:11:13 PM	Preview		

This page shows two Home Page rows:

- One row has the value **2 columns with right bar** in its **Layout** column and its **Status** column shows **Enabled**.
- The other row has the value **1 column** in its **Layout** column and its **Status** column shows **Disabled**.

- 10** Click on the first and second rows of the homepage. The following page is displayed for each of them:

- Change the **Enabled** status of the page with **2 columns with right bar** layout to **Disabled**.
- Change the **Disabled** status of the page with **1 column** layout to **Enabled**.
The homepage of the frontend now appears similar to the following page:



Managing CMS Pages

CMS (Content Management System) pages are static pages such as your **Homepage**, **About Us** and **Customer Service** pages that provide information about the web store and are managed through the Backend panel. CMS Pages are full pages that are available via their own URL addresses. Static Blocks are sections of code or graphics that can be referenced inside CMS pages as well as Category landing pages. They are page elements that can be reused and referenced throughout your site. .

The following example shows how to create a new page in Magento and then how to create a link to it from your store footer.

► To add a CMS page:

- 1 From the CMS menu, select the **Manage Pages** option to display the list of currently defined CMS pages as displayed below.



The screenshot shows the 'Manage Pages' grid in the Magento Backend. The grid lists five CMS pages with columns for Title, Identifier, Layout, Store View, Status, Date Created, Last Modified, and Action. The 'Action' column contains 'Preview' links for each page. The 'Identifier' column shows the URL key for each page. The 'Layout' column indicates the page structure (e.g., 1 column, 3 columns, 2 columns with right bar). The 'Store View' column shows the website(s) the page is assigned to. The 'Status' column indicates if the page is enabled or disabled. The 'Date Created' and 'Last Modified' columns show the creation and last update dates respectively. The 'Action' column includes a 'Preview' link for each page.

Title	Identifier	Layout	Store View	Status	Date Created	Last Modified	Action
About Us	about-magento-demo-store	1 column	All Store Views	Enabled	Aug 30, 2007 2:01:18 PM	Aug 30, 2007 2:01:18 PM	Preview
Customer Service	customer-service	3 columns	All Store Views	Enabled	Aug 30, 2007 2:02:20 PM	Aug 30, 2007 2:03:37 PM	Preview
Home page	home	2 columns with right bar	Main Website Main Store English Main Website Main Store German Main Website Main Store French	Disabled	Aug 23, 2007 10:03:25 AM	Mar 23, 2009 12:07:19 AM	Preview
Home page	home	1 column	All Store Views	Enabled	Apr 16, 2008 2:51:52 PM	Mar 23, 2009 12:10:49 AM	Preview
404 Not Found 1	no-route	2 columns with right bar	All Store Views	Enabled	Jun 20, 2007 6:38:32 PM	Aug 26, 2007 7:11:13 PM	Preview

- 2** Click the **Add New Page** button on the top right of the page to display the following page:

- 3** In the **Page Title** field, specify the words to appear in the browser's title bar.
- 4** In the **SEF URL Identifier** field, specify the unique identifier to be used in the URL. It must contain all lower case letters and no spaces. The following example uses **Our History**.
- 5** Leave the default value in the **Store View** field.
- 6** In the **Status** field, select **Enabled**.
- 7** In the **Content** field, enter the HTML code to be presented in this page.
- 8** Click the **Custom Design** option to display the following:

- 9** Click the **Layout** field and then select one of the following options:
 - **Empty:** Shows the content of an empty page with no Magento header, footer or side bars.
 - **1 Column:** Displays all the content entered in a single central column with Magento header and footer.

- **2 Columns with left/right bar:** Displays all the content entered on the page with Magento header, footer and left/right bar.
- **3 columns:** Displays both the left and right columns from the design package with the content shown between.

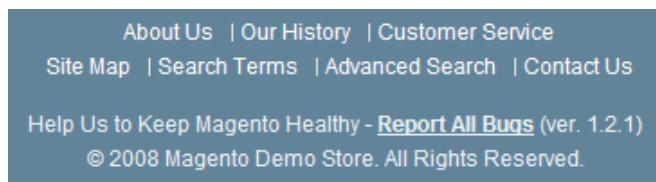
10 You can now open a browser and browse to this Landing page. The URL is taken from the value you entered in the **SEF URL Identifier**, as described above. For example: **/our_history** is added to the web store's URL.

11 The following shows how to add a link to this page from the frontend's footer. From the **CMS** menu, select the **Static Blocks** option to display the list of existing Static Blocks.

12 Click on the **Footer Links** row to display the definition of the frontend's footer.

13 In the **Content** field, add a link to the new page in the HTML code. You can do so by copying one of the existing links to a page in the HTML code and then changing the name of the page to which it links, as shown below:

The footer of the frontend now appears as follows:



Customizing Transactional Emails

Transactional Emails are all emails sent from a Magento store. Magento offers flexible and easy-to-use functionality to enable you to customize these emails and translate them into multiple languages to best use them for communication with your customers.

This section describes how to modify the emails that are sent from the web store, for example, when an account is created or an Order is placed.

► To customize a transactional email template:

- 1** From the **System** menu, select the **Transactional emails** option to display a list of the custom email templates created in this web store.

Note: This page shows only customized emails. When this page is empty, it means that Magento will only send standard default emails.
- 2** Click the **Add New Template** button to display the Template Editing page.
- 3** In the **Template** field, select the name of one of the transactional emails that you want to customize, such as **New account**.
- 4** In the **Locale** field, select the language.
- 5** Click the **Load Template** button to display the default template's HTML code in the **Template Content** area. You must change the contact phone number and email address as well as the logo image reference at the top of the page to reflect your own store information in all active templates.
- 6** Click the **Save Template** button.
- 7** Now that your customized email template is ready and available, the next step is to inform Magento that it should send this email to customers instead of the default email. This is controlled in various configuration sections depending on the type of email.

In our example of customizing a New Account email, select **System ➔ Configuration ➔ Customers ➔ Customer Configuration**. Then expand the **Create New Account Options** section and select your newly customized transactional email in the **Default Welcome Email** field.

This page was intentionally left blank.

8 Promotions

This chapter describes a variety of ways to promote your products. This chapter contains the following sections:

- **Overview**, page 149
- **Up-selling, Related Products and Cross-selling**, page 150
- **Catalog and Shopping Cart Price Rules**, page 156
- **Special Prices**, page 167
- **Tier Pricing**, page 167
- **Newsletters**, page 171

Overview

Magento offers a variety of ways to promote your products. These include options for presenting additional products in order to increase conversion rates and for providing various discounts and promotions. The possibilities are endless!

Up-selling, Related Products and Cross-selling

Three types of product promotion selling options are provided in Magento: Up-sell products, Related products and Cross-sell products.

- **Up-sell Products:** When a customer views a product, the **Up-sells** for this product are items that your customer could buy *instead* of the product that is being viewed. These products may be of a better quality, more expensive, more popular, produce a higher profit margin and so on. These products appear on the Product Information page.
- **Related Products:** Related products appear in the Product Information page in the right column. Related products are meant to be purchased **in addition** to the item the customer is viewing.
- **Cross-sell Products:** Products that are promoted in the shopping cart page right before checkout. When a customer navigates to the shopping cart (whether automatically after adding a product or otherwise), these products are offered as suggestions in addition to the products already in the shopping cart. They are similar to impulse buys, like magazines and candy at the cash registers in grocery stores.

Up-sells

The up-sell products appear in the Product Information page under the **Product Description**, as shown below. This example presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.

Microsoft Natural Ergonomic Keyboard 4000
[Be the first to review this product](#)

Availability: In stock.

\$99.99

Qty: [Add to Cart](#) OR [Add to Wishlist](#) [Add to Compare](#)

Quick Overview

The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such left and right, equal sign and back space placed just above the number pad. Easy access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!

Double click on above image to view full picture

(-) (+)

Product Description

The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such left and right, equal sign and back space placed just above the number pad. Easy access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!

You may also be interested in the following product(s)

 Logitech diNovo Edge Keyboard \$239.99	 Computer From: \$447.98 To: \$4,477.92	 Gaming Computer From: \$4,999.95 To: \$6,348.95
--	---	---

► To add Up-sells to a product:

- 1 In the backend, from the Catalog menu, select the **Manage Products** option to display a list of products, as shown below:

The screenshot shows the 'Manage Products' grid. At the top, there are filters for 'ID', 'Name', 'Type', 'Attrb. Set Name', 'SKU', 'Price', 'Qty', 'Visibility', 'Status', and 'Websites'. Below the filters, there are search and filter buttons ('Reset Filter', 'Search'). The main area displays a list of products with the following details:

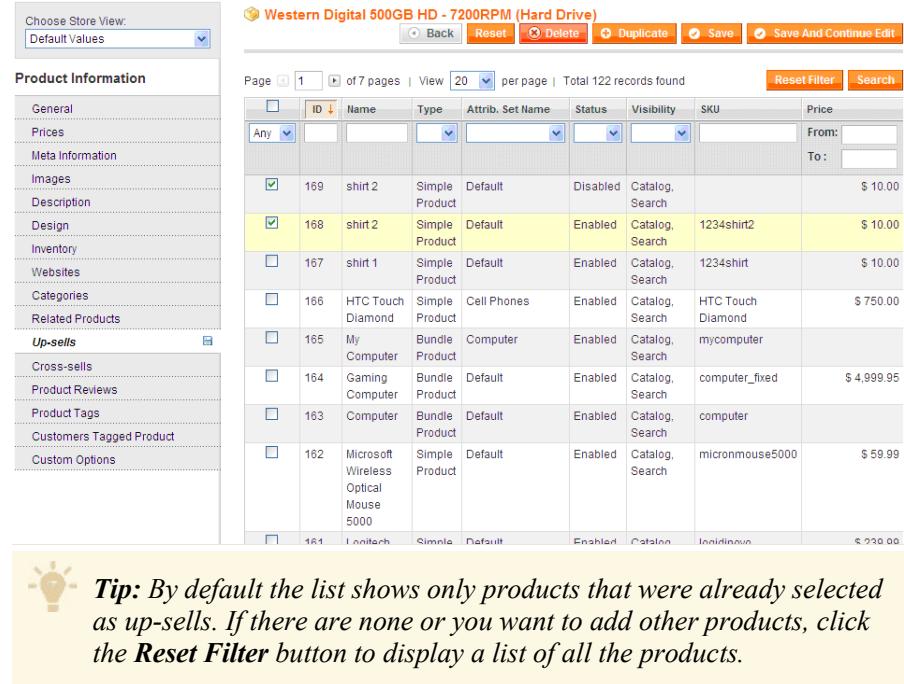
ID	Name	Type	Attrb. Set Name	SKU	Price	Qty	Visibility	Status	Websites
168	shirt 2	Simple Product	Default	1234shirt2	\$ 10.00	20	Catalog, Search	Enabled	Main Website
167	shirt 1	Simple Product	Default	1234shirt	\$ 10.00	10	Catalog, Search	Enabled	Main Website
166	HTC Touch Diamond	Simple Product	Cell Phones	HTC Touch Diamond	\$ 750.00	999997	Catalog, Search	Enabled	Main Website
165	My Computer	Bundle Product	Computer	mycomputer		999998	Catalog, Search	Enabled	Main Website
164	Gaming Computer	Bundle Product	Default	computer_fixed	\$ 4,999.95	999995	Catalog, Search	Enabled	Main Website
163	Computer	Bundle Product	Default	computer		999995	Catalog, Search	Enabled	Main Website
162	Microsoft Wireless Optical	Simple Product	Default	micronmouse5000	\$ 59.99	999999	Catalog, Search	Enabled	Main Website

- 2 Click the **Edit** link which appears on the right side of the row of the product for which you want to define Up-sells. The following page is displayed:

The screenshot shows the 'Edit Product' page for 'shirt 2 (Default)'. The left sidebar lists categories: General, Prices, Meta Information, Images, Description, Design, testgroup, Inventory, Websites, Categories, Related Products, Up-sells, Cross-sells, Product Reviews, and Product Tags. The main area shows the 'General' tab with the following fields:

Name *	shirt 2	[STORE VIEW]
SKU *	1234shirt2	[GLOBAL]
Weight *	0.1000	[GLOBAL]
Default Category		[GLOBAL]
Status *	Enabled	[WEBSITE]
Tax Class *	Taxable Goods	[STORE VIEW]
URL key	shirt-1	[GLOBAL]
Visibility *	Catalog, Search	[STORE VIEW]
Allow Gift Message	Use config	[GLOBAL]
Manufacturer		[GLOBAL]
Color		[GLOBAL]
Set Product as New from Date		[GLOBAL]

- 3** Select the **Up-sells** tab in the panel on the left.



The screenshot shows the Magento Admin interface for managing products. On the left, there's a sidebar titled "Product Information" with various tabs: General, Prices, Meta Information, Images, Description, Design, Inventory, Websites, Categories, Related Products, **Up-sells**, Cross-sells, Product Reviews, Product Tags, Customers Tagged Product, and Custom Options. The "Up-sells" tab is currently selected. The main area is a grid of products with columns for ID, Name, Type, Attrrib. Set Name, Status, Visibility, SKU, and Price. The grid shows several products like shirts and computer accessories. A tip box is overlaid on the grid, containing the following text:

Tip: By default the list shows only products that were already selected as up-sells. If there are none or you want to add other products, click the **Reset Filter** button to display a list of all the products.

ID	Name	Type	Attrrib. Set Name	Status	Visibility	SKU	Price
169	shirt 2	Simple Product	Default	Disabled	Catalog, Search	1234shirt2	\$ 10.00
168	shirt 2	Simple Product	Default	Enabled	Catalog, Search	1234shirt2	\$ 10.00
167	shirt 1	Simple Product	Default	Enabled	Catalog, Search	1234shirt	\$ 10.00
166	HTC Touch Diamond	Simple Product	Cell Phones	Enabled	Catalog, Search	HTC Touch Diamond	\$ 750.00
165	My Computer	Bundle Product	Computer	Enabled	Catalog, Search	mycomputer	
164	Gaming Computer	Bundle Product	Default	Enabled	Catalog, Search	computer_fixed	\$ 4,999.95
163	Computer	Bundle Product	Default	Enabled	Catalog, Search	computer	
162	Microsoft Wireless Optical Mouse 5000	Simple Product	Default	Enabled	Catalog, Search	microsoftmouse5000	\$ 59.99
161	Logitech	Simple Product	Default	Enabled	Catalog, Search	logitech	\$ 220.00

- 4** Select the products to appear as up-sells to this product.

- 5** Click the **Save** button.

Related Products

Related Products are shown in the right column of your web store in a separate block. The following example shows a mouse product that was added as a Related Product for a keyboard purchase.



► To add Related Products to a product:

- 1 In the backend, from the **Catalog** menu, select the **Manage Products** option to display a list of products.
- 2 Click the **Edit** link which appears on the right side of the row of the product for which you want to define Related Products.
- 3 Select the **Related Products** tab in the panel on the left to display the Product Listing page.



*Tip: By default the list shows only products that were already selected as Related Products. If there are none or you want to add other products, click the **Reset Filter** button to display a list of all the products.*

- 4 Select the products to appear as Related Products to this product.
- 5 Click the **Save** button.

Cross-sells

Cross-sell products are shown in a block below the shopping cart products, as shown below:

Based on your selection, you may be interested in the following items:



[19" Widescreen Flat-Panel LCD Monitor](#)
\$399.99
[Add to Cart](#)
[Add to Wishlist](#)
[Add to Compare](#)

Cross-sell products are displayed after a product has already been added to the shopping cart. By default, three products are randomly selected by Magento from the products that have been defined as Cross-sell products of all the products in the shopping cart.

► To add Cross-sell products to a product:

- 1 In the backend, from the **Catalog** menu, select the **Manage Products** option to display a list of products.
- 2 Click the **Edit** link which appears on the right side of the row of the product for which you want to define Cross-sell Products.
- 3 Select the **Cross-sells** tab in the panel on the left to display the page listing all assigned products.



***Tip:** By default the list shows only products already selected as cross-sells. If there are none, or you want to add other products, click the **Reset Filter** button to display a list of all the products.*

- 4 Select the products to appear as Cross-sell Products to this product.
- 5 Click the **Save** button.

Catalog and Shopping Cart Price Rules

There are two types of price rules in Magento: **Catalog Price Rules**, as described below and **Shopping Cart Price Rules**, as described on page 161. Catalog Rules are applied to products before they are added to the shopping cart, while Shopping Cart Price Rules are applied to products in the shopping cart.

Catalog Price Rules

Catalog Price Rules are applied to products before they are added to a shopping cart. They can be used to create sales and discounts that do not require that a discount code be entered by the customer. The process of defining a **Catalog Price Rule** is comprised of three stages:

- **Defining the Catalog Price Rule Information**, page 157, defines general information about this rule.
- **Defining the Catalog Price Rule Conditions**, page 158, defines the conditions that trigger the rule.
- **Defining the Catalog Price Rule Actions**, page 160, defines the actions that are executed when the conditions of this rule are met.

Defining the Catalog Price Rule Information

► To create a Catalog Price Rule:

- 1 From the **Promotions** menu, select the **Catalog Price Rules** option and then select the **Add New Rule** button to display the following page:

The screenshot shows the 'General Information' section of a Magento Catalog Price Rule configuration form. The fields and their current values are:

- Rule Name ***: Summer Sale
- Description**: Summer T-shirt Sale - 10% off
- Status ***: Active
- Websites ***: Main Website
- Customer Groups ***: NOT LOGGED IN, General, Wholesale, Retailer
- From Date**: 07/01/09
- To Date**: 08/31/09
- Priority**: (empty field)

- 2 Fill in the **Rule Name** field and the **Description** field for this Catalog Price Rule.
- 3 In the **Status** field, select **Active**.
- 4 In the **Websites** field, select the website to which this rule applies.

- 5** In the **Customer Groups** field, select the customer groups to which this rule applies.
- 6** In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.



Advanced Tip: You can use the **Priority** field (1 is the highest priority) when there are multiple rules. This determines which rule takes effect when more than one **Catalog Price Rule** applies.

Defining the Catalog Price Rule Conditions

Once you have set up the general information for the price rule, you must create the conditions that specify when the rule is triggered.

The following example shows how to discount every T-shirt that is over \$20 by 10% by defining a rule that has two Conditions.

► To define Catalog Price Rule Conditions:

- 1** Select the **Conditions** option in the panel on the left to display the following page:

- 2** The first rule appears by default: **If ALL these Conditions are TRUE**. It specifies whether the rules that you define must **all** be met or if **any** of them can be met (AND or OR) in order to trigger the rule's action. In our example, we wanted the discount to take effect when the product is either a T-shirt **or** when the product costs over \$20. Therefore, click on the word **ALL** in the page above and select **ANY**.
- 3** Click on the icon to display a selection field and select the **SKU** option under **Product Attributes** from the dropdown menu. The following page is displayed:

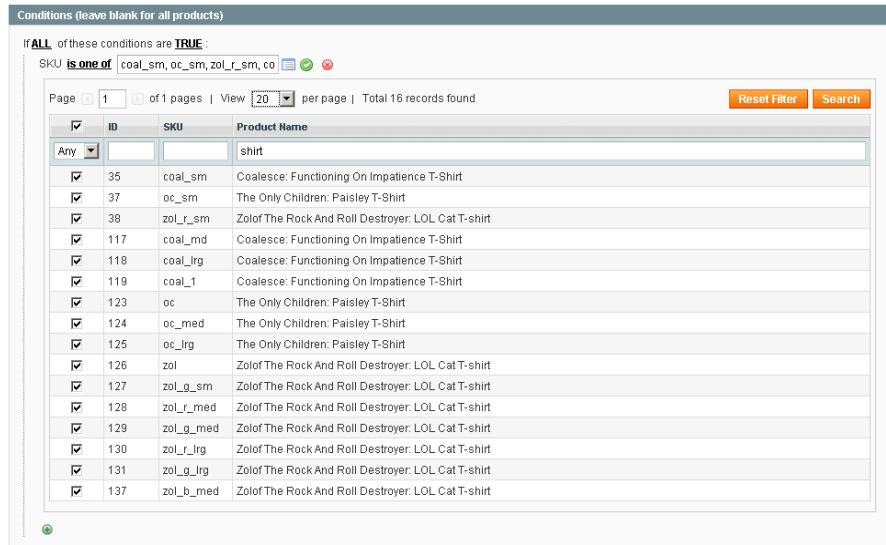
- 4** Click on the **is** link to display the following:



- 5** Select **is one of**, as shown above.
- 6** Click on the three dots to the right of the words **is one of** to display the following:



- 7** Click on the **Chooser** icon to display a list of products from which you can select, as shown below:



The page above shows the list of products filtered to show only those that have the word **Shirt** in their name.

- 8** Check the checkboxes of the products to which this rule is to apply.
- 9** Save this selection of products by clicking the **Apply** icon .

- 10** Now this rule specifies that it applies to T-shirts. You must now add the Condition that the product must cost over \$20 in order for the rule to apply. To do so, click on the  icon to display a selection field and select the **Price** option under **Product Attributes** from the dropdown menu.
- 11** Click on the **is** link and select **equals or greater than** from the **Condition** dropdown menu.
- 12** Enter the value **20.00** in the field on the right to create the second Condition, as shown below:



Conditions (leave blank for all products)

If **ALL** of these conditions are **TRUE**:

- SKU **is one of** coal sm, oc sm, zol r sm, c... 
- Price **equals or greater than** **20** 

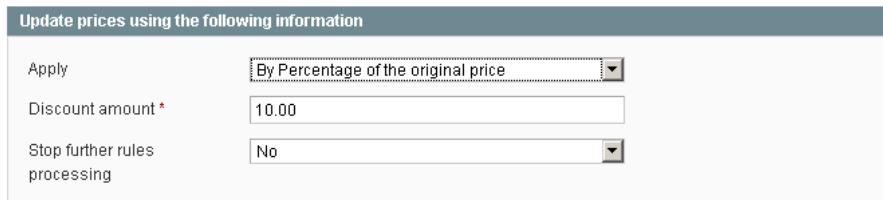


Defining the Catalog Price Rule Actions

Now that the Conditions have been defined that trigger this rule, we must define the Actions to be triggered when the Conditions are met. The following defines that T-shirts are discounted by 10%.

► To define Catalog Price Rule Actions:

- 1** Select the **Actions** option in the panel on the left to display the following page:



Update prices using the following information

Apply	By Percentage of the original price
Discount amount *	10.00
Stop further rules processing	No

- 2** The **Apply** dropdown menu enables you to define whether the discount specified in the **Discount amount** field is a percentage or a fixed amount of the price of this product. It also enables you to define whether the discount amount is subtracted from the original price (**By**) or whether the **Discount amount** field actually defines the final price (**To**). For our example, in the **Apply** field, select **By Percentage of the original price** and enter the value **10.00**. This defines a final price that is a 10% reduction of the original price.

*Note: Mistakenly selecting the **To Percentage of the original price** option would give a final price that is equal to 10% of the original price, meaning a 90% reduction.*

- 3** Select the **Save Rule** button to create the rule.
- 4** You must also select either the **Save and Apply** or the **Apply Rules** button to immediately apply this discount to the selected products.

*Note: As you add new rules, the system must recalculate the prices and the priorities of the rules. Generally, system rules are automatically processed and applied each night. In order to apply a new rule immediately, you must select one of these **Apply** buttons.*

Shopping Cart Price Rules

Shopping Cart Price Rules, as the name implies, are applied when a customer reaches the shopping cart. They can be applied either with or without the customer entering a coupon code, and include features not found in traditional coupon tools. This example defines a simple 10% discount coupon to be used for clogs when the shopping cart subtotal is over \$100.

The process of defining a **Cart Price Rule** is comprised of three stages:

- **Defining the Cart Price Rule Information**, page 162, defines general information about this rule.
- **Defining the Cart Price Rule Conditions**, page 163, defines the Conditions that trigger the rule.
- **Defining the Cart Price Rule Actions**, page 164, defines the Actions that are executed when the Conditions of this rule are met.

Defining the Cart Price Rule Information

► To create a Cart Price Rule:

- 1 From the **Promotions** menu, select the **Cart Price Rules** option and then select the **Add New Rule** button to display the following page:

The screenshot shows the 'General Information' section of a web-based configuration tool for creating a new cart price rule. The form includes fields for Rule Name, Description, Status, Websites, Customer Groups, Coupon code, Uses per coupon, Uses per customer, From Date, To Date, Priority, and Public In RSS Feed.

General Information	
Rule Name *	10% off Clogs
Description	(Empty text area)
Status *	Active
Websites *	Main Website
Customer Groups *	NOT LOGGED IN General Wholesale Retailer
Coupon code	clogs10off
Uses per coupon	(Empty text field)
Uses per customer	1
From Date	(Empty date input field)
To Date	(Empty date input field)
Priority	(Empty text field)
Public In RSS Feed	Yes

- 2 Fill in the **Rule Name** field and the **Description** field for this Cart Price Rule.
- 3 In the **Status** field, select **Active**.

- 4** In the **Website** field, select the website to which this coupon applies.
- 5** This rule only applies when a coupon code is used, so in the **Coupon Code** field, specify the code of the coupon that can be entered in the web store by the customer.

*Note: If you do not enter anything in the **Coupon Code** field, when the customer reaches the shopping cart, the discount is applied any action being taken.*

- 6** To define that each customer can only use this coupon once, in the **Uses Per Coupon** field, enter **1** and in the **Uses Per Customer** field, enter **1**.



*Tip: If we would like to create a limited offer, the coupon can be limited to be used 100 times by entering the value 100 in the **Uses per coupon** field.*

- 7** In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.



*Advanced Tip: You can use the **Priority** field (1 is the highest priority) when there are multiple rules. It determines which rule takes effect when more than one Cart Price Rule applies.*

Defining the Cart Price Rule Conditions

Once you have set up the general information for the price rule, you create the Conditions that specify when the rule is triggered. The following example shows how to create a rule that has one Condition, which checks when the shopping cart subtotal is over \$100.

► To define Catalog Price Rule Conditions:

Select the **Conditions** option in the panel on the left and define the following rule:

Apply the rule only if the following conditions are met (leave blank for all products)

If **ALL** of these conditions are **TRUE**:

Subtotal equals or greater than 100



Defining the Cart Price Rule Actions

Now that the Condition has been defined that triggers this rule, you must define the Actions to be triggered. The following defines that 10% is reduced from the product's original price.

► To define Cart Price Rule Actions:

- 1 Select the **Actions** option in the panel on the left to display the following page:

Update prices using the following information	
Apply	Percent of product price discount
Discount amount *	10
Maximum Qty Discount is Applied to	0
Discount Qty Step (Buy X)	
Free shipping	No
Stop further rules processing	No

- 2 The **Action** tab has two important sections. The first one controls the discount. In the **Apply** field, select **Percent of product price discount**.
- 3 In the **Discount amount** field, enter **10** to indicate that 10% is reduced from the product's original price.



Tip: Other options, not related to this example are available, such as: Fixed amount discount, Fixed amount discount for whole shopping cart and Buy X get Y free.

- 4 In the **Maximum Qty Discount is Applied to** field, specify the maximum quantity of products to which this discount can be applied. If you enter **5** in this field, then the first five products of this type purchased in the same shopping cart get the 10% discount and the sixth product of the same type does not get the discount.
- 5 In the **Discount Qty Step (Buy X)** field, specify how often the discount is applied. This field is not relevant to our example, so leave this field empty. If you enter **8** here, then a 10% discount is applied to all the products after the eighth product is added to the shopping cart. If more than eight items are added to the shopping cart, the ninth through 15th products do not get the discount until the 16th product is added to the shopping cart, at which point the discount is 10% for all 16 products. This discount continues for every factor of eight and is useful for products sold in packages of eight.

- 6** In the **Free Shipping** field, specify whether to combine the coupon amount with a free shipping offer, for only the products for which the coupon is valid or for the entire Order, when one of these products is in the shopping cart. This field is not relevant to our example, so leave the **No** value in this field.
- 7** After defining the coupon as described above, select the products for which the coupon is valid. In our example, the coupon discount applies to clogs.
- 8** Define a Condition that applies to the SKU of clogs, as shown below:

Apply the rule only to cart items matching the following conditions (leave blank for all items)

If **All** of these conditions are **TRUE**:

SKU **is one of** cn_3, cn, cn_4, cn_5, cn_6, cn_

	ID	SKU	Product Name
Any			clog
<input checked="" type="checkbox"/>	29	cn_3	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	83	cn	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	84	cn_4	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	85	cn_5	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	86	cn_6	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	87	cn_7	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	88	cn_m8	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	89	cn_m9	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	90	cn_m10	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	91	cn_m11	CN Clogs Beach/Garden Clog
<input checked="" type="checkbox"/>	92	cn_m12	CN Clogs Beach/Garden Clog

Page 1 of 1 pages | View 20 per page | Total 11 records found

Reset Filter **Search**

- 9** Click the **Save Rule** button.

Example: Defining a Buy 2 Get 1 Free Promotion

This section describes how to create another discount coupon with a **Buy 2 get 1 free** promotion. In this example, the web store is trying to push a digital camera as a family deal. This is a Shopping Cart Price rule.

► To define a Buy 2 get 1 free promotion:

- 1 Define the **Coupon Information**, as described above, but leave the **Coupon Code** field blank. This defines that the discount takes effect as soon as a customer adds the products to the shopping cart.

Update prices using the following information

Apply	Buy X get Y free (discount amount is Y)
Discount amount *	1
Maximum Qty Discount is Applied to	0
Discount Qty Step (Buy X)	2
Free shipping	No
Stop further rules processing	No

Apply the rule only to cart items matching the following conditions (leave blank for all items)

If **ALL** of these conditions are **TRUE**:

SKU is **QC-2185**

- 2 Do not define any Conditions because this rule is always applied to the Digital Camera. The deal is created for the Argus QC-2185 Quick Click 5MP Digital Camera available in the Magento Sample Data.
- 3 Define the Actions to be triggered when the Condition above is met. In the **Apply** field, select the **Buy X get Y free** option.
- 4 Click the **Save Rule** button.

You can now send out your marketing message telling customers that if they buy 3 Argus QC-2185 Quick Click 5MP Digital Cameras one of them will be free.



Tip: It is good practice to test the effect of these rules yourself before trying them out on the public. Either use a discount code that only you know or assign your test customer to a testing customer group and limit the cart rules to only that customer group.

Special Prices

Special prices enable you to define a discounted price for a product for a specified period of time.

► To define Special Price:

- 1 From the **Catalog** menu, select the **Manage Products** option to display a list of products.
- 2 Click the **Edit** link on the right side of the relevant product's row.
- 3 Click the **Prices** tab in the panel on the left.

Prices		Create New Attribute											
Price *	<input type="text" value="59.99"/> [USD]	[GLOBAL]											
Cost	<input type="text"/>	[GLOBAL]											
Tier Price	<table border="1"><thead><tr><th>Website</th><th>Customer Group</th><th>Qty</th><th>Price</th><th>Action</th></tr></thead><tbody><tr><td colspan="5">+ Add Tier</td></tr></tbody></table>	Website	Customer Group	Qty	Price	Action	+ Add Tier					[GLOBAL]	
Website	Customer Group	Qty	Price	Action									
+ Add Tier													
Special Price	<input type="text" value="49.99"/> [USD]	[GLOBAL]											
Special Price From Date	<input type="text" value="3/22/09"/>	[GLOBAL]											
Special Price To Date	<input type="text"/>	[GLOBAL]											
Not available for purchase with Google Checkout	<select value="No"></select>	[GLOBAL]											

- 4 In the **Special Price** field, enter the special price.

- 2** Optionally, set **Special Price From / To Date**. If you leave these fields blank, the special price is applied immediately and applies until removed on the same page.

The special price is shown on home page as follows:



[Microsoft Wireless
Optical Mouse 5000](#)

Regular Price: ~~\$59.99~~

Special Price: \$49.99

[Add to Cart](#)

[Add to Wishlist](#)

[Add to Compare](#)

Tier Pricing

Tier Pricing is a promotional tool that enables a web storeowner to price products differently when higher quantities are purchased. This is an effective way to move more merchandise and appeal to customers who buy more than one product at a time. When a customer adds a certain quantity of a product to their shopping cart, the price is automatically changed to reflect the discount.

► To define Tier Pricing:

- 1** From the **Catalog** menu, select the **Manage Products** option to display a list of products.
- 2** Click the **Edit** link on the right side of the relevant product's row.
- 3** Click the **Prices** tab in the panel on the left.

Prices						Create New Attribute
Price *	99.99 [USD]			[GLOBAL]		
Cost	50.00 [USD]			[GLOBAL]		
Tier Price	Website	Customer Group	Qty	Price	Action	
	All Websites [USD]	All Groups	5	and above	89.99	
	All Websites [USD]	All Groups	10	and above	69.99	
						+ Add Tier
Special Price				[GLOBAL]		
	[USD]					
Special Price From Date	<input type="text"/>			[GLOBAL]		
Special Price To Date	<input type="text"/>			[GLOBAL]		
Not available for purchase with Google Checkout	No			[GLOBAL]		

- 4** Add tiers by clicking the **Add Tier** button.



Tip: 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 in each.

The prices on the frontend 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.

After saving the product, it shows the following Tier Pricing block on the frontend:

- ▶ Buy 5 for **\$89.99** each and **save 11%**
- ▶ Buy 10 for **\$69.99** each and **save 31%**

On the product listing pages, the best available deal is displayed below the regular price, as shown below:



Microsoft Natural Ergonomic Keyboard 4000

\$99.99
As low as: **\$69.99**

[Add to Cart](#)
[Add to Wishlist](#)
[Add to Compare](#)

Newsletters

Magento provides a Newsletter functionality, which enables store administrators to send newsletters to customers who have registered to receive them.

The first step in creating newsletters is to configure the newsletter settings for your site.

► To configure newsletter settings on your site:

- 1 From the **System** menu, select the **Configuration** option to display the configuration page.
- 2 From the **CUSTOMERS** area in the panel on the left, select the **Newsletter** option and expand the **Subscription Options** area to display the following page:

The screenshot shows the 'Newsletter' configuration page. At the top right is a 'Save Config' button. Below it is a 'Subscription Options' section with the following fields:

Setting	Value
Unsubscription Email Sender	Customer support
Unsubscription Email Template	Default Template from Locale
Success Email Template	Default Template from Locale
Success Email Sender	General contact
Confirmation Email Sender	Customer support
Confirmation Email Template	Default Template from Locale
Need to Confirm	No

- 3 In the **Need to Confirm** field, select **Yes** to specify that each customer that registers for a newsletter will receive an email asking them to confirm their registration. This technique is called double opt-in, meaning that customers confirm that they want to receive a newsletter twice. This method reduces the number of customers that consider your newsletter as spam.

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.

► To create a new newsletter template:

- 1 From the **Newsletter** menu, select the **Newsletter Templates** option to display a page listing the previously defined 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 to display the following page:

The screenshot shows a form titled 'Template Information'. It contains four text input fields: 'Template Name *', 'Template Subject *', 'Sender Name *', and 'Sender Email *'. Below these fields is a larger text area labeled 'Template Content *'. Inside the 'Template Content' area, there is a small amount of code: '<!-- This tag is for unsubscribe link --> Follow this link to unsubscribe {{var subscriber.getUnsubscriptionLink()}}'.

- 3 In the **Template Name** field, enter a unique and indicative name for this template. This value is not visible for customers.
- 4 In the **Template Subject** field, specify the subject of the email to be sent to your customers.
- 5 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.

- 6** In the **Template Content** field, enter the HTML code of 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.
- 7** Click **Preview Template**, to display the content with the HTML tags formatting as will be viewed by your subscribers.
- 8** After you have finished editing the template, click the **Save Template** button to save it.



*Tip: After you have saved a template, a **Save As** button appears when you edit this template. The **Save As** button enables you to duplicate the template, so that you can make changes and save the template as a new template without affecting the original template. This can save you time as you do not have to reenter all the template information in order to create a new template. If you already have an existing template that is similar to the new template, simply edit the fields that you require, and then use the **Save As** button to create a new template.*

Newsletter Queues

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 this queue, it sends the emails in packs.

► To send your newsletter using a queue:

- 1** From the **Newsletter** menu, select the **Newsletter Templates** option.
- 2** In the **Action** column of the relevant template, select the **Queue Newsletter** option.
- 3** In the **Queue Date Start** field, specify when the newsletter will start being sent.
- 4** Review the template and parameters and then click the **Save Newsletter** button to schedule sending the newsletter.

Newsletter Reports

Three newsletter reports are provided in the **Newsletter** menu, as described below:

- **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. It enables you to remove the incorrect emails from the subscribers list.

9 Managing Orders and Customers

This chapter describes how to manage customers and how to add Orders from the backend. This chapter contains the following sections:

- **Managing Customers**, page 175
- **Managing Orders**, page 178

Managing Customers

Viewing and Editing Customers

► To view existing customers:

- 1 From the **Customers** menu, select the **Manage Customers** option to see a list of all the customers that opened accounts in your web store or were added using the **Add New Customer** button, as shown below:

The screenshot shows a table with columns: ID, Name, Email, Group, Telephone, ZIP, Country, State/Province, Customer Since, Website, and Actions. The 'Actions' column includes links for 'Edit' and 'Delete'. The 'Customer Since' column shows dates like 'Mar 23, 2009' and 'Aug 30, 2007'. The 'Website' column shows 'Main Website'.

ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
2	Test Customer	test@testcompany.com	General	123-123-1234	90123	United States	California	Mar 23, 2009 12:13:12 AM	Main Website	Edit
1	John Doe	john.doe@example.com	General					Aug 30, 2007 11:23:13 PM	Main Website	Edit

- 2 Click the **Edit** link on the right side of a customer's row or click the **Add New Customer** button to display the following page:

The screenshot shows a complex form with several sections: 'Customer Information' (with tabs for 'Customer View', 'Account Information', 'Addresses', 'Orders', 'Shopping Cart', 'Wishlist', 'Newsletter', 'Product Reviews', and 'Product Tags'), 'Personal Information' (with fields for Last Logged In, Last Logged In (UTC), Confirmed email, Account Created on, Account Created in, and Customer Group), 'Sales Statistics' (with tables for 'Website' and 'All Store Views'), and 'Recent Orders' (with sections for 'Shopping Cart - 2 item(s)' and 'Wishlist - 0 item(s)').

The tabs in the left panel provide a variety of types of information about the customer and for handling the relationship with a customer, such as: when the customer last logged in and out, addresses, ordering statistics, recent Orders, current shopping cart contents, their last reviews, the newsletter to which they subscribed and so on.

The Group to which the customer belongs determines which discounts are given to this customer, as defined in the **Catalog Price Rules** and **Shopping Cart Price Rules** which are described in the *Catalog and Shopping Cart Price Rules* section on page 156, and the tax rule that is applied to that customer.

Adding a Customer

Customers typically register themselves in your web store using the **My Account** link in the header of each page. In addition, you can use the following option to add a customer using the backend.

► To add a new customer:

- 1 From the **Customers** menu, select the **Manage Customers** option.
- 2 Click the **Add New Customer** button to display the following page:

The screenshot shows the 'New Customer' form in the Magento backend. The form is organized into several sections:

- Customer Information:** Includes tabs for 'Customer Information', 'Account Information', and 'Addresses'. The 'Account Information' tab is active.
- Account Information:** This section contains the following fields:
 - Associate to Website: A dropdown menu set to 'Admin'.
 - Prefix: An input field.
 - First Name *: An input field.
 - Middle Name/Initial: An input field.
 - Last Name *: An input field.
 - Suffix: An input field.
 - Email *: An input field.
 - Customer Group *: A dropdown menu set to 'General'.
 - Date Of Birth: A date picker input field.
 - Tax/VAT number: An input field.
 - Send welcome email: A checkbox.
- Password Management:** This section contains:
 - A 'Password *' input field.
 - An 'or' separator.
 - A checkbox for 'Send auto-generated password'.

At the top right of the form are buttons for 'Back', 'Reset', and 'Save Customer'.

This page enables you to define basic identifying information about the customer and his/her various addresses. Many aspects of the information retained about a customer in Magento can be accessed by editing the customer's information, as described in the *Viewing and Editing Customers* section on page 175.

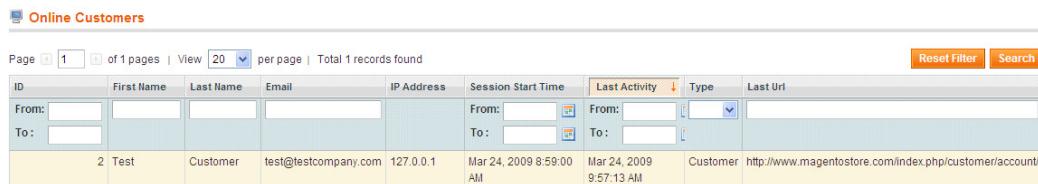
- 3 Fill out the customer's information and then click the **Save Customer** button.

Checking Online Customers

You can check which customers are currently online and view their activity.

► To view online customers:

From the **Customers** menu, select the **Online Customers** option to display the following page:



The screenshot shows a grid titled 'Online Customers'. At the top, there are navigation links: 'Page 1 of 1 pages', 'View 20 per page', and 'Total 1 records found'. On the right, there are 'Reset Filter' and 'Search' buttons. The grid has columns: ID, First Name, Last Name, Email, IP Address, Session Start Time, Last Activity (sorted by time), Type, and Last Url. There is a search bar at the top of each column. A single row is visible, representing a customer named 'Test' with ID 2. The row includes the customer's details, session information (IP 127.0.0.1, start Mar 24, 2009 8:59:00 AM, last activity Mar 24, 2009 9:57:13 AM), type (Customer), and the URL they were last on (http://www.magentostore.com/index.php/customer/account/).

ID	First Name	Last Name	Email	IP Address	Session Start Time	Last Activity	Type	Last Url
From:					From:		From:	
To:					To:		To:	

2 Test Customer test@testcompany.com 127.0.0.1 Mar 24, 2009 8:59:00 AM Mar 24, 2009 9:57:13 AM Customer http://www.magentostore.com/index.php/customer/account/

Customer Reports

A variety of customer reports can be generated by selecting the **Reports** menu and then the **Customers** option.

The following describes the available Customer reports:

- **New Accounts:** Shows the customers that have opened accounts in your web store during the period that you specify.
- **Customer by orders total:** Lists customers with the ones that spend the most money in your web store listed first.
- **Customer by number of orders:** Lists customers with the ones that make the most orders listed first.

Managing Orders

The *Managing Orders* section in *Chapter 3, Introducing the Backend* on page 44 introduces the procedures for handling the day-to-day order management tasks in your web store. This section assumes that you have read that chapter.

You may refer to the *Viewing the Orders in Your Web Store* section on page 44 for a description of how to view and edit the Orders in your web store.

Orders Terminology

This section describes some of the terms used for handling Orders in Magento. In addition to creating Orders, there are many features in the Magento backend that are part of the process of managing and fulfilling Orders, such as creating Invoices, shipments and credit memos and editing and cancelling Orders.

Sales Order

When an Order is created in a Magento web store, either in the frontend or in the backend, a Sales Order is created to record this transaction. This Sales Order can be seen in the Orders list by selecting the **Orders** option from the **Sales** menu in the backend.

This is only a temporary record. Payment has not yet been processed and the Order can still be canceled.

Invoice

An Invoice is a record of the receipt of payment for an Order.

Note: *In some cases, payment is automatically received during the creation of an Invoice.*

Creating an Invoice for a product's Order converts the temporary Sales Order into a permanent record of an Order, which can no longer be cancelled.

Multiple Invoices can be created for a single Order, each containing as much or as few of the purchased products that you specify.

Shipment

A Shipment is a record of the products in an Order which have been shipped. Like an Invoice, multiple Shipments can be created per Order, until all of the products in the Order are shipped.

Credit Memo

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 until after an Invoice has been created.

The Credit Memo serves as a record of a refund, but it is not a record of a return (which is the actual returning of funds to the customer).

Creating New Orders

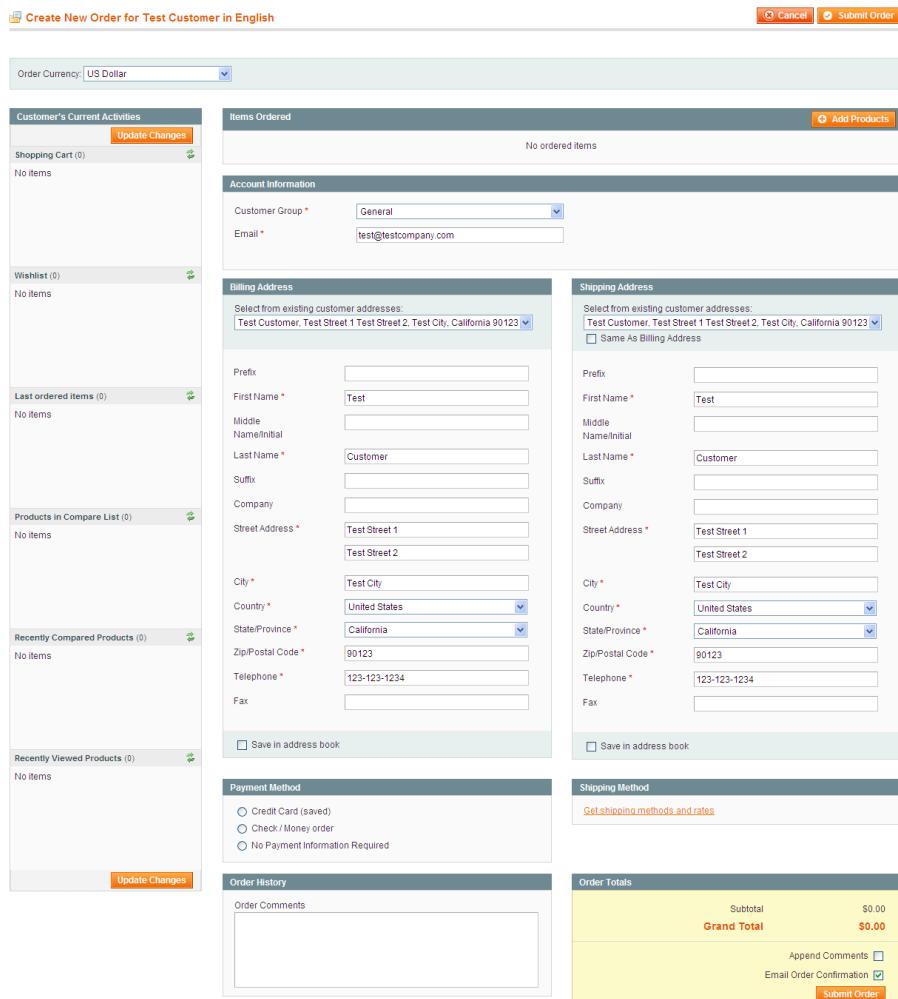
This section describes how to create an Order using the backend, such as when an Order is received on the phone.

► To create a new Order from the backend:

- 1** From the **Sales** menu, select the **Orders** option.
- 2** Click the **Create New Order** button on the top right of the page to display the following page:

ID	Name	Email	Telephone	ZIP/Post Code	Country	State/Province	Signed Up From
2	Test Customer	test@testcompany.com	123-123-1234	90123	United States	California	English
1	John Doe	john.doe@example.com					English

- 3** Select a customer or click the **Create New Customer** button to display the following page:



Note: If your store has multiple store views, you are first asked in which of the store views the order should be created.

Note: If you selected to create a new customer, you need to fill all the address information.

- 4** Click the **Add Products** button to display the following page:

Please select products to add				Add Selected Product(s) to Order	
ID	Product Name	SKU	Price	<input type="checkbox"/>	Qty To Add
166	HTC Touch Diamond	HTC Touch Diamond	\$750.00	<input type="checkbox"/>	
162	Microsoft Wireless Optical Mouse 5000	micronmouse5000	\$59.99	<input type="checkbox"/>	
161	Logitech diNovo Edge Keyboard	logidinovo	\$239.99	<input type="checkbox"/>	
160	Logitech Cordless Optical Trackman	logitechcord	\$79.99	<input type="checkbox"/>	
159	Microsoft Natural Ergonomic Keyboard 4000	microsoftnatural	\$99.99	<input type="checkbox"/>	
157	30" Flat-Panel TFT-LCD Cinema HD Monitor	M9179LL	\$699.99	<input type="checkbox"/>	
156	19" Widescreen Flat-Panel LCD Monitor	W1952TQ-TF	\$399.99	<input type="checkbox"/>	
155	Seagate 250GB HD - 5400RPM	250gb5400	\$99.00	<input type="checkbox"/>	
154	Seagate 500GB HD - 5400RPM	500gb5400	\$299.00	<input type="checkbox"/>	
153	Intel Core 2 Extreme QX9775 3.20GHz Retail	intelcore2extreme	\$2,049.99	<input type="checkbox"/>	
152	24" Widescreen Flat-Panel LCD Monitor	W2452T-TF	\$699.99	<input type="checkbox"/>	
151	Intel C2D E8400 3.0GHz Retail	intetc2d	\$98.99	<input type="checkbox"/>	
150	Western Digital 500GB HD - 7200RPM	500gb7200	\$299.00	<input type="checkbox"/>	
149	Western Digital - 1TB HD - 7200RPM	1tb7200	\$399.00	<input type="checkbox"/>	
			\$98.99	<input type="checkbox"/>	

- 5** Select the products to be purchased and click the **Add Selected Product(s) to Order** button.



Tip: If you selected one of the existing customers, then the left column shows a list of the products that this customer has in his/her cart, wish list, recently ordered, viewed or compared. To add one those products to the order, select the required product and click **Update Changes** button.

- 6** Fill out the other mandatory fields of the Order, those marked by an asterisk (*), such as: shipping method and payment method.
- 7** You can define many options for the order like choosing custom prices for products and applying discount codes.
- 8** After you have completed all the required Order information, click the **Submit Order** button to display the order information page.
- 9** To confirm payment, click the **Invoice** button to generate an Invoice for your review.
- 10** Review the Invoice, and if all is well, click the **Submit Invoice** button at the bottom of the page.
- 11** When you are ready to ship the products, click the **Ship** button to generate a Shipment document.

12 If required, you can add a tracking number received from the shipping service by clicking the **Add Tracking Number** button. Adding a tracking number enables customers to review their Order using the **My Account** option that appears on the right side of the header of the frontend.

13 Review the Shipment. You can modify the quantity to be shipped if only part of the Order is ready.

The Order changes to **Completed** status after all its products have been shipped.

14 Click the **Email Copy of Shipment** option, shown below, to automatically send an email to the customer notifying them that their products were shipped.

15 Click the **Submit Shipment** button at the bottom of the page.

16 Click the **Back** button to return to the Orders page where you can create additional Orders if required. You may refer to *Chapter 9, Managing Orders and Customers* on page 175 for more details.

Refunding

You can create a record of a product refund from an existing Order by generating a Credit Memo.

► To view the list of refunds made in your web store:

From the **Sales** menu, select the **Credit Memos** option to display the following page:

Credit Memos										
Actions										
Select All Unselect All Select Visible Unselect Visible 0 items selected										
	Credit Memo #	Created At	Order #	Order Date	Bill to First name	Bill to Last name	Status	Refunded	Action	
Any	From: <input type="text"/>	From: <input type="text"/>	From: <input type="text"/>	From: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	From: <input type="text"/>	To: <input type="text"/>	
	To: <input type="text"/>	To: <input type="text"/>	To: <input type="text"/>	To: <input type="text"/>						
<input type="checkbox"/>	100000001	Mar 24, 2009 11:17:01 PM	100000004	Mar 24, 2009 9:49:38 PM	Test	Customer	Refunded	\$63.07	View	

► **To refund a product from an existing Order:**

Note: You can create Credit Memos only for Orders for which Invoices were created. Without an Invoice, an Order is assumed not to be paid so that there is nothing to refund in a Credit Memo.

- 1 From the **Sales** menu, select the **Orders** option to display a list of the existing Orders.
- 2 Click the **View** link on the right side of the row of each Order to display the Order view page.
- 3 Click the **Credit Memo** button to generate a credit memo.
- 4 Scroll down to the **Items to Refund** area, as shown below, and in the **Qty to Refund** field of the relevant product, specify the quantity of products to refund.
- 5 To specify that this product was actually returned to the web store, check the **Return to Stock** option, shown below:

Items to Refund									
Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total	
Coalesce: Functioning On Impatience T-Shirt SKU: coal_sm Size Small	\$15.00	Ordered 1 Invoiced 1	<input type="checkbox"/>	<input type="text" value="1"/>	\$15.00	\$1.24	\$0.00	\$16.24	

- 6 Click the **Email Copy of Credit Memo** option, shown below, to automatically send an email to the customer that the order has been refunded. You can also adjust the refund totals to match your business rules.

Refund Totals	
Subtotal	\$15.00
Tax	\$1.24
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Total Refund	\$21.24
<input type="checkbox"/> Append Comments <input type="checkbox"/> <input type="checkbox"/> Email Copy of Credit Memo <input type="checkbox"/>	
Refund	

- 7** Click the **Refund** button at the bottom of the page. The total of the Order from which this product was refunded is updated automatically.
- 8** Click the **Back** button to return to the Orders page where you can create additional Orders, if required.

Important Note: Currently, refunding an Order in Magento does not cause an actual payment refund. You must refund the payment on your own. Credit Memo is only a record used to track the refunds and to provide proper values in the reports.

10 Managing Customer Generated Content

This chapter describes how to manage customer generated content, such as ratings, reviews, tags and polls. This chapter contains the following sections:

- **Managing Ratings and Reviews**, page 185
- **Managing Tags**, page 190
- **Managing Polls**, page 192

Managing Ratings and Reviews

Rating and review functionality is provided by Magento to enable customers and web storeowners to give their opinions, feedback and comments about products. This appears in the frontend, as follows:



The quantity of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual reviews provided by customers or input your own Review, as shown below:

The screenshot shows a "Customer Reviews" page with a single item. The review is titled "Comfortable!!! Review by Essentl". It includes three star ratings: Quality (4 stars), Value (3 stars), and Price (4 stars). The review text reads: "This is the most comfortable shirt I own... I will buy many of these shirts (Posted on 8/29/07)". Below the review, there is another search bar and pagination controls.

Customizing a Rating

This section describes how to create a new customized rating.

- From the **Catalog** menu, select the **Reviews & Ratings** option and from the sub-menu select the **Manage Ratings** option to display the following page:

The screenshot shows the "Manage Ratings" page. At the top right is an "Add New Rating" button. Below it are search and filter options. The main area displays a table with columns for ID and Rating Name. The table contains three records: 3 Price, 1 Quality, and 2 Value.

ID	Rating Name
3	Price
1	Quality
2	Value

- 2** Click the **Add New Rating** button to display the following page:

New Rating

Back Reset Save Rating

 If you do not specify a rating title for a store, the default value will be used.

Rating Title	
Default Value *	<input type="text"/>
English	<input type="text"/>
French	<input type="text"/>
German	<input type="text"/>

Rating Visibility	
Visible In	<input type="checkbox"/> Main Website <input type="checkbox"/> Main Store <input type="checkbox"/> English <input type="checkbox"/> French <input type="checkbox"/> German

- 3** In the **Default Value** field enter a name for this rating.
- 4** Click the **Save Rating** button.

Customers Adding Reviews

A customer can enter a new review by clicking the **Add Your Review** button to display the following page in which to enter their review:

Write Your Own Review

You're reviewing: Coalesce: Functioning On Impatience T-Shirt

How do you rate this product?*

	1 star	2 stars	3 stars	4 stars	5 stars
Quality	<input type="radio"/>				
Price	<input type="radio"/>				
Value	<input type="radio"/>				

Nickname*

Summary of Your Review*

Review*

Submit Review

Approving Reviews for Public Viewing

New reviews entered by customers must be approved by the web store administrator in the backend before they appear on the frontend.

► To view and approve new reviews:

- From the Catalog menu, select **Reviews & Ratings** ➔ **Customer Reviews** ➔ **Pending Reviews** to display the following page:

Pending reviews										
Page <input type="text" value="1"/> of 1 pages View <input type="text" value="20"/> per page Total 1 records found Pending Reviews RSS										
Select All Unselect All Select Visible Unselect Visible 0 items selected										
ID	Created On	Title	Nickname	Review	Visible In	Type	Product Name	Product SKU	Action	Actions
Any	From: <input type="text"/>									Edit
To: <input type="text"/>										
<input type="checkbox"/>	114 Mar 24, 2009 11:58:12 PM	Great Product!	test	Good quality and interesting print.	Main Website Main Store English	Guest	Coalesce: Functioning On Impatience T-Shirt	coal_1	Edit	

- Click the **Edit** link on the right side of the relevant review's row to display the following page:

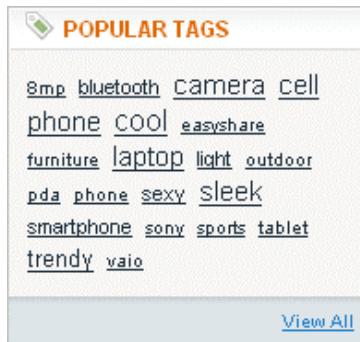
Review Details

Product	Coalesce: Functioning On Impatience T-Shirt																									
Posted By	Guest																									
Summary Rating	★★★★★																									
Detailed Rating *	<table><tr><td>1 star</td><td>2 stars</td><td>3 stars</td><td>4 stars</td><td>5 stars</td></tr><tr><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input checked="" type="radio"/></td></tr><tr><td>Quality</td><td></td><td></td><td></td><td></td></tr><tr><td>Price</td><td></td><td></td><td></td><td></td></tr><tr><td>Value</td><td></td><td></td><td></td><td></td></tr></table>	1 star	2 stars	3 stars	4 stars	5 stars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Quality					Price					Value				
1 star	2 stars	3 stars	4 stars	5 stars																						
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>																						
Quality																										
Price																										
Value																										
Status *	<input type="text" value="Pending"/>																									
Visible In *	<table border="1"><tr><td>Main Website</td></tr><tr><td>Main Store</td></tr><tr><td>English</td></tr><tr><td>French</td></tr><tr><td>German</td></tr></table>	Main Website	Main Store	English	French	German																				
Main Website																										
Main Store																										
English																										
French																										
German																										
Nickname *	<input type="text" value="test"/>																									
Summary of review *	<input type="text" value="Great Product!"/>																									
Review *	<input type="text" value="Good quality and interesting print."/>																									

- You can modify the review, if required.
- In the **Status** field, change the **Pending** status to **Approved** or **Not Approved**.

Managing Tags

Tags can be assigned by customers directly in the frontend. A Tag describes a specific property of a product, such as Cool, Valentine's gift and so on. Popular Tags serve as a descriptor that customers can select in order to view the products to which a specific tag has been assigned. The following shows an example of various tags as they appear in the web store.



Adding Tags

The number of tags that can be added to a product is unlimited and they can later be renamed or deleted.

► To add tags to a product in the frontend:

- 1 In the frontend, scroll to the **Product Tags** section which appears in the product page under the **Product Description** area, as shown below:

- 2 Use spaces to separate tags and use single quotation marks ('') to indicate phrases, meaning a few words that must appear together. The image above shows what it looks like when a customer adds three tags:
 - rock and roll
 - t-shirt
 - red

Note that phrases are inside single quotes. After submitting the tags, an administrator has to approve them.

Approving Tags

Tags must first be approved by the backend administrator before they appear on the front-end. Once a tag has been approved by the backend administrator it can be used for other products and does not need to be approved again.

► To approve a tag:

- 1 In the backend, from the **Catalog** menu, select **Tags ➔ Pending Tags** to display the following page:

The screenshot shows a grid titled "Pending Tags". At the top, there are filters for "Page" (1), "View" (20 per page), and a search bar. Below the filters is a toolbar with buttons for "Select All", "Unselect All", "Select Visible", "Unselect Visible", "Actions", and "Submit". The grid itself has columns: Tag, Uses, Products, Customers, Popularity, Visible In, and Actions. There are two rows of data:

Tag	Uses	Products	Customers	Popularity	Visible In	Actions
Any	From: [] To: []	1 All Store Views Main Website Main Store English				
dark green	1	1	1	1	1	1 All Store Views Main Website Main Store English
rock and roll	1	1	1	1	1	1 All Store Views Main Website Main Store English

This page shows a list of tags that have not yet been approved.

- 2 In the **Action** field next to each tag, select one of the following Actions:
 - **View Products:** Displays a list of all products that have been tagged with this word or phrase.
 - **View Customers:** Displays a list of all the customers that have clicked this tag when viewing any product.
 - **Edit Tag:** Displays the following page in which you can change the **Status** column value from **Pending** to **Approved** or **Disabled**.

The screenshot shows a form titled "Edit Tag 'rock and roll'". It has a section for "General Information" with fields for "Tag Name" (containing "rock and roll") and "Status" (set to "Pending").

General Information	
Tag Name *	rock and roll
Status *	Pending

- 3 Click the **Save Tag** button.



Tip: You can select and change the status or delete multiple tags at once. Check their checkboxes and select the appropriate option from the **Action** field in the heading row. Next, click **Submit** to apply the selected action.

*Note: If a customer has entered a tag that you do not want to ever see again, simply change the status to **Disabled**.*

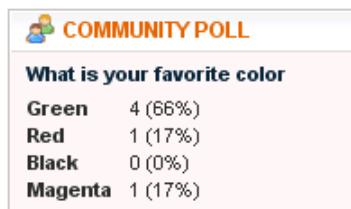
Managing Polls

Polls provide a powerful marketing tool for finding out the opinion of your customers about your products, store, customer service and more.

It is very simple to create a poll. The following shows an example of how a poll appears in the store:

The screenshot shows a 'COMMUNITY POLL' section. At the top, there is a question: 'What is your favorite color'. Below the question are four options, each preceded by a radio button: 'Green', 'Red', 'Black', and 'Magenta'. A large blue 'Vote' button is located at the bottom of the poll area.

A poll only occupies a small amount of space on your store pages and is shown in the right column by default. Poll results are immediately displayed to customers after an answer is submitted, as shown below:



► **To create a poll:**

- 1** From the CMS menu, select the **Poll Manager** option, which shows a list of existing polls.
- 2** Click on the **Add New Poll** button in the top right corner of the window to display the following page:

The screenshot shows the 'New Poll' interface. At the top, there are three buttons: 'Back', 'Reset', and 'Save Poll'. Below this is a section titled 'Poll information' with the following fields:

- 'Poll Question *': An empty text input field.
- 'Status': A dropdown menu set to 'Open'.
- 'Visible In *': A dropdown menu containing:
 - Main Website
 - Main Store
 - English
 - French
 - German

- 3** In the **Poll Question** field, enter the question that your customer will be asked.
- 4** In the **Status** field, specify whether the poll is **Open** or **Closed**. The status of the poll is **Open** by default, which means that it appears in your store. If you do not want it to appear in your store, select the **Closed** option.
- 5** Select the store(s) you want the poll to appear in.
- 6** Click on the **Poll Answers** option in the left panel to display the following page:

The screenshot shows the 'Assigned Answers' interface. At the top, there are three buttons: 'Back', 'Reset', and 'Save Poll'. Below this is a section titled 'Assigned Answers' with a single button:

+ Add New Answer

- 7** Click on the **Add New Answer** button to add possible answers to your question that can be selected by your customers in the store. The following page is displayed:

The screenshot shows a web interface for managing poll answers. At the top, there are buttons for 'Back', 'Reset', and 'Save Poll'. Below this, a section titled 'Assigned Answers' contains two entries. Each entry has fields for 'Answer Title:' and 'Votes Count:', with a value of '0' in both. To the right of each entry is a red 'Delete' button. At the bottom of the list is a large orange 'Add New Answer' button.

- 8** In the **Answer Title** field, enter the text of the answer to appear in your store for customers to select.
- 9** To influence the poll results prematurely, you can add votes to the count in the **Votes Count** field, which is 0 by default.
- 10** Repeat steps **7** to **9** for each answer that you want to appear in this poll.
- 11** Click the **Save Poll** button.

That's it! If the status of your poll is now **Open**, meaning that it will appear in the store. Customers can only answer a poll once and you can view the results here. If you have multiple polls, they will cycle randomly in the front-end, meaning every time a user refreshes a page they may see a different active poll question.

Editing a Poll

Once a poll has been created, you can edit it by selecting the **Poll Manager** option from the **CMS** menu. Click on the relevant poll in the list of polls to view its details.

To close the poll so it no longer appears in the store, change the **Status** field to **Closed** in the **Poll information** section.

To see the votes that have been tallied for each answer, click the **Poll Answers** option in the left panel to display the number of votes in the **Vote Count** field, as shown below:

Assigned Answers		
Answer Title: *	Layered Navigation	<input type="button" value="Delete"/>
Votes Count:	1889	
Answer Title: *	Price Rules	<input type="button" value="Delete"/>
Votes Count:	1340	
Answer Title: *	Category Management	<input type="button" value="Delete"/>
Votes Count:	724	
Answer Title: *	Compare Products	<input type="button" value="Delete"/>
Votes Count:	762	

This page was intentionally left blank.

11 Monitoring and Improving the Web Store

This chapter describes how to monitor and improve your web store by defining reports, search terms, synonyms, redirects and Google Analytics. This chapter contains the following sections:

- **Reports**, page 197
- **Search Terms**, page 200
- **Search Synonyms and Redirects**, page 201
- **Google Analytics**, page 203

Reports

This section describes some of the most important reports in Magento. This section first provides a full description of how to generate a Sales Report and a brief description of other important reports.

Generating 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.

Sales Report

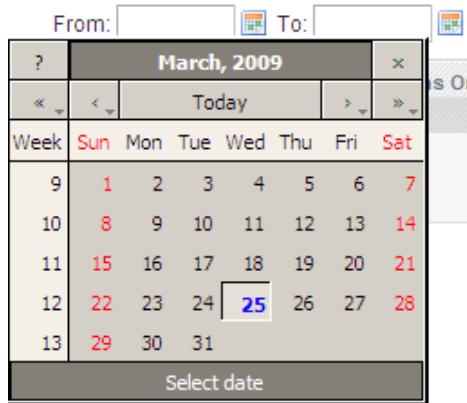
The Sales report provides information about the sales in your web store.

► **To display the Sales report:**

- 1 From the **Reports** menu, select the **Sales** option and then **Sales Report** to display the following page:

The screenshot shows the 'Sales Report' interface. At the top, there is a dropdown menu labeled 'Show Report for: All Websites'. Below it are input fields for 'From' and 'To' dates, a 'Show by' dropdown set to 'Day', and a 'Refresh' button. To the right are 'Export to:' options for CSV and PDF, and an 'Export' button. A table below has columns: Period, Number of Orders, Items Ordered, Subtotal, Tax, Shipping, Discounts, Total, Invoiced, and Refunded. A message at the bottom of the table says 'No records found for this period.'

- 2** In the **From** and **To** fields, specify the start and end date of the information to be included in the report. You can click the calendar icon to display a date picker, as shown below:



- 3** In the **Show By** field, specify whether the information in the report is aggregated by **Day**, **Month** or **Year**.
- 4** Click the **Refresh** button to display the report, as shown below:

Sales Report										
Show Report for: All Websites										
From:	03/22/09	To:	03/24/09	Show by:	Day	Refresh	Export to:	CSV	Export	
Period	Number of Orders	Items Ordered	Subtotal	Tax	Shipping	Discounts	Total	Invoiced	Refunded	
mar 22, 2009	2	2	\$30.00	\$2.48	\$10.00	\$0.00	\$42.48	\$21.24	\$0.00	
mar 23, 2009	1	1	\$15.00	\$1.24	\$5.00	\$0.00	\$21.24	\$0.00	\$0.00	
mar 24, 2009	1	1	\$49.99	\$4.12	\$8.96	\$0.00	\$63.07	\$63.07	\$63.07	
Total	4	4	\$94.99	\$7.84	\$23.96	\$0.00	\$126.79	\$84.31	\$63.07	

- 5** To export the report information shown on the screen, select the **CSV** (Comma Separated Values) option or the **Excel** option from the **Export to** field on the top right.

Abandoned Carts Report

The Abandoned Carts report shows information about shopping carts that were started and then abandoned, meaning that after putting some products in the shopping cart, the customer did not complete an Order and the sale was lost.

► To display the Abandoned Carts report:

From the **Reports** menu, select the **Sales** option and then **Sales Report** to display the following page:

Abandoned carts

Show Report for: All Websites

Page: 1 of 1 pages | View: 20 per page | Total 1 records found

Export to: CSV Export Reset Filter Search

Customer Name	Email	Number of Items	Quantity of Items	Subtotal	Applied Coupon	Created at	Updated at
Test Customer	test@testcompany.com	1	1	15.0000		Mar 22, 2009 8:49:39 PM	Mar 23, 2009 12:13:16 AM

 *Tip: This reports enables you to contact the customers and offer them discounts or otherwise turn an abandoned cart into a conversion.*

Best Selling Products

The Bestsellers report shows information about the best selling products (those that sold the highest quantity) in your web store, as shown below:

► To display the Bestsellers report:

From the **Reports** menu, select the **Products** option and then **Bestsellers**. Next, select the desired **From** and **To** date and click **Refresh** to display the following page:

Bestsellers

Show Report for: All Websites

From: 03/22/09 To: 03/24/09 Show by: Day Refresh

Export to: CSV Export

Period	Product Name	Price	Quantity Ordered
mar 22, 2009	Coalesce: Functioning On Impatience T-Shirt	\$15.00	2
mar 23, 2009	Coalesce: Functioning On Impatience T-Shirt	\$15.00	1
mar 24, 2009	Microsoft Wireless Optical Mouse 5000	\$59.99	1
Total			4

Most Viewed Products

The Most Viewed report shows information about the most frequently viewed products in your web store, whether they were purchased or not, as shown below:

► To display the Most Viewed report:

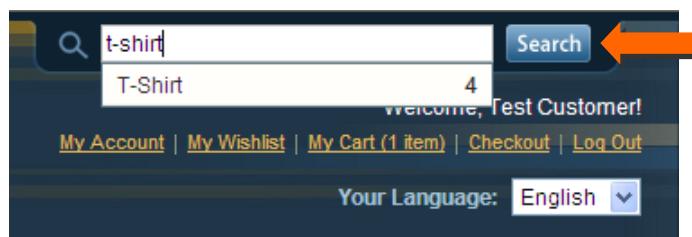
From the **Reports** menu, select the **Products** option and then **Most Viewed**. Next, select the desired **From** and **To** date and click **Refresh** to display the following page:

The screenshot shows a report titled "Most Viewed". At the top, there are dropdown menus for "Show Report for" (set to "All Websites") and date ranges ("From: 03/22/09" to "To: 03/24/09"). Below these are buttons for "Refresh" and "Export to: CSV". The main content is a table with columns: Period, Product Name, Price, and Number of Views. The data shows products viewed on March 22, 2009, and a total for March 24, 2009.

Period	Product Name	Price	Number of Views
mar 22, 2009	Coalesce: Functioning On Impatience T-Shirt	\$15.00	6
	Apple MacBook Pro MA464LL/A 15.4" Notebook PC	\$2,299.99	2
	Nokia 2610 Phone	\$149.99	1
	Toshiba M285-E 14"	\$1,599.99	1
	Acer Ferrari 3200 Notebook Computer PC	\$1,799.99	1
mar 23, 2009	No records found for this period.		
mar 24, 2009	Coalesce: Functioning On Impatience T-Shirt	\$15.00	1
Total			13

Search Terms

The Search Terms report shows information about the most frequently used search terms in your web store. Searches can be performed in your web store by entering a term in the **Search** field in the top right corner of the web store page, as shown below:



► To display the Search Terms report:

From the **Reports** menu, select **Search Terms** to display the following page:

ID	Search Query	Store	Results	Hits
39	ottoman	Main Website Main Store English	2	189
38	photo	Main Website Main Store English	11	44
37	laptop	Main Website Main Store English	6	300
36	black	Main Website Main Store English	11	21
35	comp	Main Website	23	36

The **Results** column specifies how many times a specific search term was used by a customer in your web store.

The **Hits** column specifies how many products in total were displayed as the results of searches that contained this search term.

This report enables you to fine-tune the Attributes and Tags that you create in the backend in order to optimize the search results displayed to customers.



*Tip: If you see that the **Hit** field of a product shows a high number (meaning that customers search for it often), but the **Results** column shows a low number or zero, then you should review your products names and descriptions to promote products related to this keyword.*

Search Synonyms and Redirects

The following shows you how to fine-tune Magento's search behavior. Two mains options are provided:

- **Search Synonyms:** Misspelled search terms may mean missed opportunities for you. If you know that a frequently used search term is often misspelled by customers, and thus does not display results, you can add additional search terms, as described below.
- **Redirects:** You can specify that when a customer searches for a certain term that they are re-directed to a specific page. Direct customers to a specific product page, a specific brand landing page or to informational pages. For example: Returns will direct customers to the Shipping Policy page.

In the following example, we show how, when a customer enters the search term **latop**, the web store returns the results for the search term **laptop**.

► **To add new search synonym and or redirection:**

- 1 From the **Catalog** menu, select the **Search** option to display the following page:

The screenshot shows a search results page with the following details:

Search Query	Store	Results	Number of Uses	Synonym for	Redirect	Display in Suggested Terms	Action
Test	Main Website Main Store English		8	654		Yes	Edit
acer	Main Website Main Store English		1	394		Yes	Edit
couch	Main Website Main Store English		2	367		Yes	Edit
Shirts	Main Website Main Store		3	410		Yes	Edit

- 2 Click the **New Add New Search Term** button to display the following page:

The screenshot shows a form titled "General Information" with the following fields:

Search Query *	latop
Store *	English
Synonym For	laptop
Redirect URL	(Will make search for the query above return results for this search.) ex. http://domain.com
Display in Suggested Terms	No

- 3 In the **Search Query** field, specify the incorrect spelling of the term, for example **latop**.
- 4 In the **Synonym For** field, specify the correct search term that is defined in your web store, for example **laptop**.
- 5 In the **Redirect URL** field, specify the URL to which the customer is redirected when no results are returned for a search term.
- 6 Click the **Save Search** button.

Google Analytics

Google Analytics is a free service offered by Google to help websites owners find out more about the traffic on their website and about conversions. Magento supports both the following options:

- **Page View Tracking:** Enables you to see the origin from which your web store visitors linked to your store.
- **E-commerce Tracking:** Enables you to see which customers make purchases and what they buy.

You can sign up to this service at <https://www.google.com/analytics>. While signing up, a report is displayed showing your new Google Analytics account number in the following format: UA-XXXXXXX-1. Write this number down, because it is required for configuring Google Analytics in Magento, as described below.

► To add Google Analytics tracking to Magento:

- 1 From the **System** menu, select the **Configuration** option.
- 2 From the **SALES** area in the panel on the left, select the **Google API** option. Expand the **Google Analytics** section to display the following:

Google Analytics	
Enable	Yes
Account number	UA-XXXXXXX-1

- 3 In the **Enable** field, select **Yes**.
- 4 In the **Account number** field, enter the Google Analytics account number that you wrote down when you signed up at www.google.com, as described above.



Tip: Magento supports native integration with Google Website Optimizer, which is another free service from Google that enables you to test different versions of page elements and to select the elements that provide the best conversion rates.

12 Keeping Your Store Healthy

This chapter describes how to keep your store healthy by using a staging environment, updating Magento and extending Magento. This chapter contains the following sections:

- **General**, page 204
- **Staging Environment**, page 204
- **Updating Magento**, page 205
- **Extending Magento**, page 207

General

Now that you have your own web store running and are selling products, do not forget to keep it in good condition. Make sure that your hosting provider performs regular file and database backups.

Staging Environment

If you plan to change and develop your web store over time, we recommend that you set up a staging environment (also called a testing environment) in which you can test your ideas before applying them to the live store. We highly recommend that you also use this environment when updating new versions of Magento.

At its simplest, the staging environment is just like any other Magento installation that is not accessible to the public. If you are modifying the files, you can keep them synchronized with the live files using any of the various available version control tools.

Updating Magento

Magento is constantly evolving. New features are added and problems resolved on an ongoing basis. From time to time you will be notified about a new Magento version. This notice will be published in the Magento blog and the backend will display a message when you log in. If the update is critical, contains mandatory functionality or resolves issues that you have encountered, you should definitely update your web store.

Warning: *If your store has a custom theme, when you upgrade it to a new version, you will benefit from the bug fixes, but new front-end functionality may not be visible. Upgrading between major versions, such as between version 1.1 and 1.2 can render your site and any custom functionality unusable until you perform a few minor configuration changes (which are usually noted along with the new version announcement). We highly recommend that you first test all upgrades in a staging environment before applying it to your live store.*

► **To update your web store to a new version:**

- 1 From the **System** menu, select the **Magento Connect** option and then the **Magento Connect Manager** option.
- 2 Log in using your backend username and password and click **Log In**. The following window is displayed:

The screenshot shows the 'Magentoconnect MANAGER' interface. At the top, there are tabs for 'Extensions' and 'Settings', and links for 'Return to Admin' and 'Log Out'. Below the tabs, there's a section for 'Install New Extensions' with instructions to search via Magento Connect or paste an extension key, followed by an 'Install' button. The main area is titled 'Manage Existing Extensions' and shows a table of installed modules. The table has columns for 'Package Name', 'Installed', 'Actions', and 'Summary'. Modules listed include Interface_Adminhtml_Default, Interface_Frontend_Default, Interface_Install_Default, Lib_Google_Checkout, Lib_Js_Calendar, Lib_Js_Ext, Lib_Js_Mage, Lib_Js_Protoype, Lib_LinLibertineFont, Lib_Varien, and Lib_ZF. Most modules are at version 1.2.1 (stable), except for Lib_Google_Checkout at 1.2.0 (stable) and Lib_Js_Ext at 1.0.18800 (stable). The 'Actions' column contains dropdown menus. A 'Check for Upgrades' button is located above the table, and a 'Commit Changes' button is to its right. A checkbox for 'Clear all sessions after successful install or upgrade' is also present. The table has a scroll bar on the right side.

Package Name	Installed	Actions	Summary
Interface_Adminhtml_Default	1.2.1 (stable)	<input type="button" value=""/>	Default interface for Adminhtml
Interface_Frontend_Default	1.2.1 (stable)	<input type="button" value=""/>	Default interface for Frontend
Interface_Install_Default	1.2.1 (stable)	<input type="button" value=""/>	Default interface for Install
Lib_Google_Checkout	1.2.0 (stable)	<input type="button" value=""/>	Google Checkout Library
Lib_Js_Calendar	1.2.0 (stable)	<input type="button" value=""/>	Javascript Calendar for Magento
Lib_Js_Ext	1.0.18800 (stable)	<input type="button" value=""/>	Extjs Javascript Libraries for Magento
Lib_Js_Mage	1.2.1 (stable)	<input type="button" value=""/>	Javascript Libraries for Magento
Lib_Js_Protoype	1.2.0 (stable)	<input type="button" value=""/>	Prototype and Scriptaculous Javascript Libraries for Magento
Lib_LinLibertineFont	1.1.1 (stable)	<input type="button" value=""/>	LinLibertine Open Fonts Project fonts for PDF print-outs
Lib_Varien	1.2.1 (stable)	<input type="button" value=""/>	Varien Library
Lib_ZF	1.7.2.1 (stable)	<input type="button" value=""/>	Zend Framework

- 3 Click the **Check for Upgrades** button. If there are upgrades available for any of the Magento modules, they are marked in yellow.
- 4 In the **Actions** field, select the upgrades to be installed and click the **Commit Changes** button.
- 5 Wait until the installation has finished and click the **Return to Admin** link in the header.
- 6 Congratulations! You have just upgraded your Magento. Now check your site to make sure everything works as expected.

Extending Magento

There are hundreds of payment gateways and shipping providers 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. If you need to add functionality to Magento, you should first search for it on **Magento Connect**, which is our marketplace for extensions. You can access **Magento Connect** at: <http://www.magentocommerce.com/magento-connect>. The following page is displayed:

The screenshot shows the homepage of the Magento Connect website. At the top, there's a navigation bar with links like "Log In", "Logout", "Help", and "Support". Below the navigation is a search bar with placeholder text "Search for extension or category". The main content area has three main sections: "Magento Core" (extensions by the team), "Community" (open source extensions by the community), and "Commercial" (extensions under a commercial license). Below these are "Featured Extensions" and "Top 10 Downloads". On the right side, there's a sidebar titled "EXPLORE MAGENTO CONNECT" with sections for "Category", "Type", and "Stability", each listing various extension types and their counts. At the bottom right, there's a "POPULAR TAGS" section.

Various free extensions are provided from this page.

The following example shows how to install CyberSource core payment extensions that add a new payment method to the store called **CyberSource**.

Note: There are also commercial extensions available for purchase on their publishers' pages. The installation process for each one may vary. Please consult the extension author for installation instructions.

► **To install a free extension:**

- 1** Go to the **MagentoConnect** page on the **MagentoCommerce** site at <http://www.magentocommerce.com/>.
- 2** Browse through the extensions using the filters provided in the panel on the right.
- 3** Go into the details page of each selected extension to display a page similar to the following:

Cybersource Extension

The screenshot shows the details page for the Cybersource extension. At the top, there's a large thumbnail image of the Cybersource logo. Below it, a button says "Click here to view full size". Underneath the image are several interaction buttons: "Get extension key", "Discuss this Extension", "Request New Feature", and "Report a Bug". A note below these buttons states: "Please note that this extension is provided as is. It is recommended to always backup your installation prior to usage." To the right of the image is a detailed sidebar with the following information:

Created	Magento Core
Last Updated	Tue, January 20, 2009
Version	1.1.2
Compatibility	Magento 1.1, 1.2
Stability	beta
Locales available in this package	English (United States) - en_US
Downloads	564
Community Rating	2 votes 2 reviews
Categories	Payment Gateways
License Type	Open Software License (OSL)
Tags	cybersource , payment

At the bottom of the sidebar, a link says "Need help? [Find a Magento Professional »](#)". Below the sidebar, there's a navigation bar with tabs: "Overview" (which is active), "Reviews", "Releases", "Patches", and "Documentation".

Overview

Cybersource Extension

This extension provides Cybersource payment gateway integration with SOAP toolkit API. It requires PHP SOAP extension to be installed.



- 4** Click the **Get extension key** button to display the following:

The dialog box contains a checkbox labeled "By checking this box I agree to the extension license agreement." and a "GET EXTENSION KEY" button.

- 5** Read and accept the licensing agreement by checking the checkbox shown above.

- 6** An extension key similar to the following is displayed:
magento-core/Mage_Cybersource
This is a special link to an extension that Magento recognizes. Copy it to the clipboard (**Ctrl + C**).
- 7** From the **System** menu in your Magento Backend Panel, select the **Magento Connect** option and then the **Magento Connect Manager** option.
- 8** Log in using your backend username and password and click **Log In**.
- 9** Paste the extension key in the **Install New Extensions** section, as shown below:



1 Search for modules via [Magento Connect](#).
2 Paste extension key to install: **Install**

- 10** Click the **Install** button and wait until the installation has finished.

You can now return to the backend and start using the extension that you have just installed!

Note: After you install a payment module, then this new option appears in the System menu under Configuration ➔ SALES ➔ Payment Methods.

13 Getting Help

Magento offers a variety of options and possibilities, but also has a learning curve. Varien provides several resources for getting help discovering Magento and using it daily to attain your eCommerce objectives.

You can start with the **Search** field at the top of the community site found at <http://www.magentocommerce.com>, which provides results from the Magento forum, knowledge base, wiki, groups and other resources.

If you are unable to find answers to your questions, try posting your question in the Magento forums where thousands of participants help each other with Magento issues.

► To access Magento forums:

Go to <http://www.magentocommerce.com/boards> and log in using the username and password that you have created while downloading Magento. Choose a forum that best matches your question.



Tip: For those of you that require a guaranteed response time, Varien offers support agreements at <http://www.magentocommerce.com/support/>. This web page also offers consulting services to help you with any task that is not covered by support.

If you found the answer yourself and were unable to find it elsewhere, please share it with others. Use the wiki or forums to write and share it.

There are also several other community features in addition to the forums described above that enable the exchange of ideas and help. They are:

- **Groups:** Link community members working on or interested in specific subjects, such as Designing For Magento and Drop Shippers.
- **Chat:** Provides a real time discussion with Magento community members.
- **Wiki:** Provides community editable pages for sharing ideas and findings, tutorials and information

The following lists other resources available to help you use get the most out of Magento:

Knowledge Base

The Magento knowledge base is a Wiki that provides instructions published by Magento or community members in the form of guides and how-to's.

At: <http://www.magentocommerce.com/knowledge-base>

Webinar Archive

Up-to-date webinars are provided by Magento in which you can learn real-world tips and tricks in order to get the most out of your stores and promotions.

At: <http://www.magentocommerce.com/media/webinar-archive>

Screen casts

Screen casts are presentation videos that can guide you through many of the Magento features.

At: <http://www.magentocommerce.com/media/screencasts>

Magento User Guide

The Magento User Guide provides explanations and detailed field descriptions about many of Magento's features.

At: http://www.magentocommerce.com/support/magento_user_guide

Magento Designer's Guide

The Magento Designer's Guide provides information for designers describing Magento concepts and design implementation in Magento.

At: http://www.magentocommerce.com/design_guide

Magento Blog

The Magento Blog contains fresh updates describing new Magento releases, interesting showcases and events.

At: <http://www.magentocommerce.com/blog>

Technical Documents and Magento Core API

These provide developers with information on how to develop Magento.

At: <http://docs.magentocommerce.com/>

Here you can find information about all Magento classes and functions.

At: http://www.magentocommerce.com/support/magento_core_api

Here you can find information and usage examples for calling Magento using an API. This enables easier integration of Magento with existing systems.

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