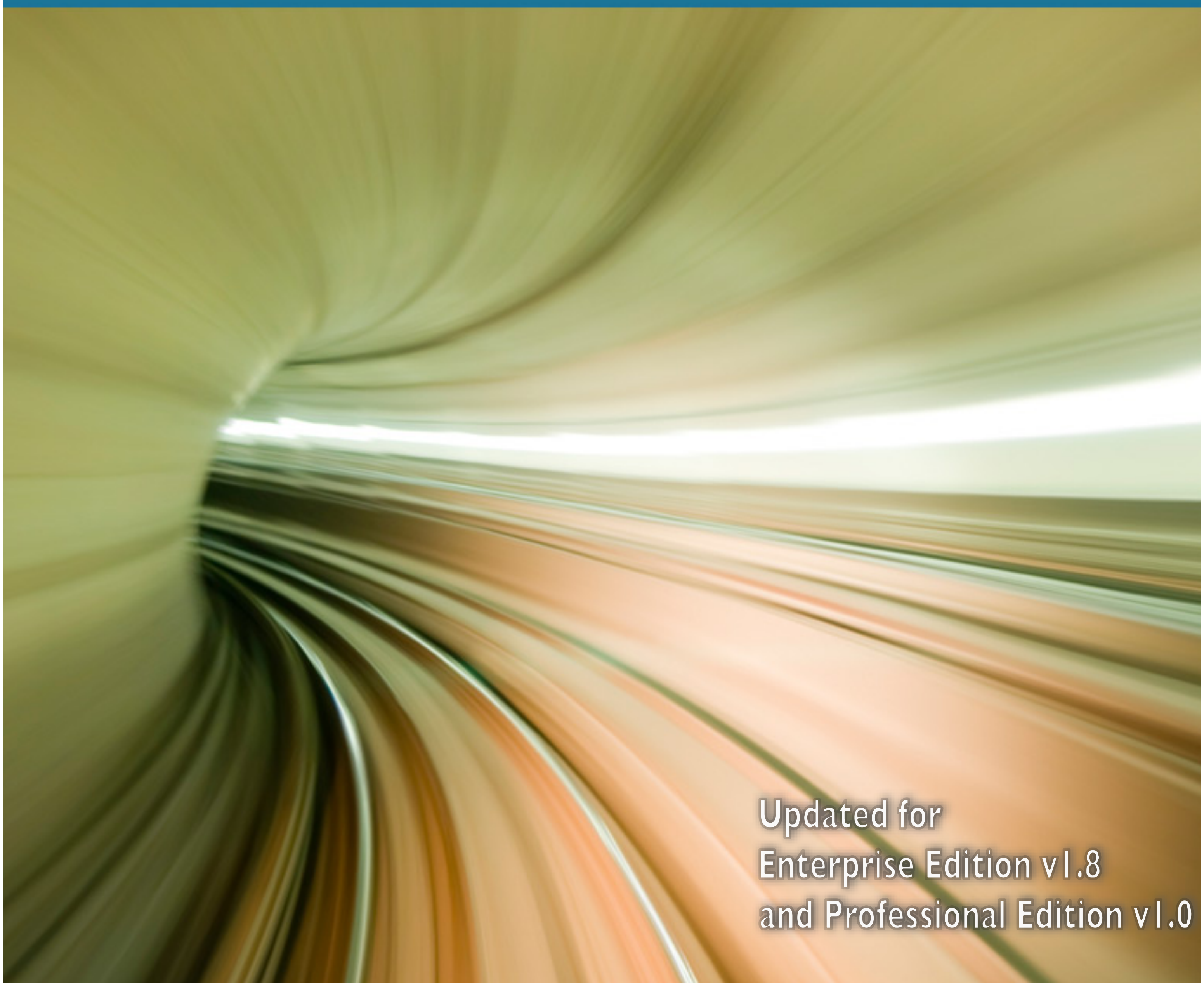
# Magento
# Enterprise User Guide

*Leverage the Magento Enterprise Enhancements*

The Official Magento Enterprise Edition User Guide



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# Contents

# About This Manual

This manual is intended as a supplement or follow-on to the *Magento User Guide*. The *Magento User Guide* provides a comprehensive view of the basic Magento features and how to get started setting up and managing a store and a catalog in Magento. This document—the *Magento Enterprise & Professional User Guide*—builds on the *Magento User Guide* and documents the features that are exclusive to the Magento Enterprise Edition and the new Magento Professional Edition.

## Document at a Glance

Magento Professional Edition contains a subset of features available in Magento Enterprise Edition. Both the Enterprise and Professional Editions contain all of the capabilities of the Community Edition. The table below lists the major features and enhancements that are available to Magento Enterprise and Professional customers and where they're covered in this document. Please see the release notes for the full set of additional improvements, changes and bug fixes for your specific release version.

| Functional Area | Key Features | Professional Edition | Enterprise Edition |
|---|---|---|---|
| Site management | • Strong data encryption | Ch 4 | Ch 4 |
| | • Customer access restriction (by customer group and category) | | Ch 1 |
| | • Admin access restriction (to specific stores & data) | | Ch 1 |
| | • Administrator action logging | | Ch 4 |
| | • Content staging and merging | | Ch 2 |
| | • Enhanced caching & full-page caching | | Ch 3 (v1.7+) |
| Catalog & content management | • CMS+ (Enhanced Content Management) | | Ch 5 (v1.7+) |
| | • Enhanced inventory features | | Ch 6 (v1.8+) |
| | • Product search using Solr | | Ch 7 (v1.8+) |
| Marketing & promotion | • Gift Certificates/Cards (Physical & Virtual) | Ch 9 | Ch 9 |
| | • Reward Points System | Ch 10 | Ch 10 (v1.7+) |
| | • Rich Merchandising Suite | | Ch 8 (v1.7+) |

| | | | |
|---|---|---|---|
| | • Automated email marketing reminders | | Ch 8 (v1.8+) |
| | • Private (club) Sales | | Ch 11 |
| Customer & order management | • Customer Store Credits | Ch 12 | Ch 12 |
| | • Assisted shopping | | Ch 13 (v1.8+) |
| | • Order archiving | | Ch 14 (v1.8+) |
| Accounting & ERP package integration | • BridgeConnect Module (separately downloadable) | See *Bridge Connect User Guide* | See *Bridge Connect User Guide* |

## Conventions Used in this Document

Throughout this document the following notation is used to clarify the edition/version of the software in which a feature is available:

| | |
|---|---|
| [PE] | Feature/functionality is available in Magento Professional Edition |
| [EE] | Feature/functionality is available in Magento Enterprise Edition |
| [EEv1.8+] | Feature/functionality is available in Magento Professional Edition v1.8 or later |

## Current Document Scope (published May 2010)

- Magento Enterprise Edition v1.8.0.0
- Magento Professional Edition v1.8.0.0

# PART I—
# SITE MANAGEMENT FEATURES

## 1 Controlling Website Access [EE]

This chapter introduces Magento Enterprise Edition's functionality for restricting access to your websites—both on the backend and the frontend.

For you admin users, Enterprise Edition allows you to control what they can see in the Admin Panel. You can restrict which features/functions are available to an admin user as well as which websites' or stores' products and data they can see.

For your customers, Enterprise Edition also allows you to easily control whether your frontend website is temporarily closed (for example, for maintenance) or whether your website is open to all visitors or to only logged in customers or customers in specific customer groups (for example, for private sales or B2B websites).

### Limiting Administrator Access to the Admin Panel (Backend)

As with all versions of Magento you can create individual accounts for each user to whom you want to allow access to the backend Admin Panel. You can even create roles that define which Admin Panel functionality those admin users will have access to. Additionally, Magento Enterprise Edition allows you to further restrict that admin access to only a specific site or set of sites and their associated data. If you have multiple brands or business units with separate stores all on the same Magento installation, this allows you to provide admin access to each of your business units but to still hide and protect their data from one another.

To limit which websites or stores admin users can see when they log in to the Admin Panel, you'll create a role with a limited scope and resources. Once you have created a restricted role, you can assign that to a specific admin user account. Admin user assigned to a restricted role will only be able to see and change data for websites or stores associated with that role. They will also be unable to change global settings or data.

If an admin user's access is restricted to a specific set of websites and/or stores, the websites and stores for which they are not authorized will not be shown in the scope dropdowns or they will be displayed as inactive. Only the sales and other data for allowed websites and stores will be shown.

### To limit admin role access to specific websites or stores:

1. Choose **System > Permissions > Roles**.
2. Click on the **[+Add New Role]** button to create a new role.
3. In the **Role Info** tab:
    - **Role Name**—(required) Give the role a descriptive name to help you remember its scope and purpose.
4. Select the **Role Resources** tab in the left column.
    - In the **Role Scopes** panel, set the following values:
        - Change the **Role Scopes** dropdown to **Custom**.
        - Check/click the websites and/or stores that you want users with that role to have access to from the resulting list.
    - In the **Role Resources** panel, set the following values:
        - Change the **Resource Access** dropdown to **Custom**.
        - Check/click the menus and features that you want users with that role to have access to in the resulting list. **Important Note:** Be sure to disable access to at least the Permissions tool here in the Roles Resources section if you are limiting website/store access for a given role. Otherwise, users with this role will be able to modify their own restrictions.
        - If desired, select the **Role Users** tab and assign existing Admin user accounts to this new role. Click the **[✔Save Role]** button to save your new role.

After creating a restricted role, you can create new admin users at any time (**System> Permissions> Users**) and assign your new restricted role to the admin users whose access you wish to limit as you create the accounts.

## Limiting Visitor/Customer Access to the Website (Frontend)

Another Enterprise Edition concept, called website restrictions, provides you with the ability to either shut down access to your site completely (for example, if it's closed for maintenance) or to restrict access to only logged in customers (for example, for B2B websites or for private sales).

## Restricting customer access from an entire website

If you wish to temporarily close your website, you can do so easily in Enterprise Edition by setting the website restrictions to "website closed." This will temporarily redirect site visitors to any URL under Magento control to a single landing page of your choice.

### To restrict access to an entire website:

1. Choose **System > Configuration**. Select the **General** tab on the left.
2. In the **Website Restrictions** panel, you can set the following values:
   - **Access Restriction** - Determines whether the website restriction features are enabled. If **Yes**, frontend website access is restricted in the manner set in the fields below. If **No**, this feature in disabled and the following settings have no effect.
   - **Restriction Mode** - There are three possible modes.
     - **Website Closed**—All access to the frontend website is restricted and the website is essentially "closed." All frontend URLs are temporarily redirected to the page specified as the **Landing Page** below. This setting can be useful during site maintenance or just prior to launch.
     - **Private Sales: Login Only**—Users can only access the frontend website if they first log in. All frontend URLs are temporarily redirected to either the specified landing page or to the login form until the user logs in. Users cannot create a new account themselves when the site is in this mode.
     - **Private Sales: Login and Register**—Users can only access the frontend website if they first log in. All frontend URLs are temporarily redirected to the login form until the user logs in. Users can create a new account themselves when the site is in this mode.
   - **Startup Page** - Determines whether the site displays the login form or a landing page until a user logs in. This setting is only applicable in Private Sales mode (if the previous setting is either Private Sales: Login Only, or Private Sales: Login and Register), because the Website Closed option prohibits users from logging in altogether.
     - **To login form**—Users are redirected to the log in form until they log in.
     - **To landing page**—Users are redirected to the static page specified below until they log in. Important note: Be sure to include a link to the login page from the specified landing page so that customers can log in to access the full site.
   - **Landing Page** – Specifies the landing page users see either when the website is closed or when you have chosen to startup from a landing page in Private Sales mode.

- **HTTP response** - Specify the HTTP response sent out when your website is closed and a connection is attempted by bots, crawlers, or spiders.
  - **503 Service unavailable** means that the page is not available, and the index will not be updated.
  - **200 OK** means the landing page returned is the correct page, and the spider might assume the landing page is the only page on the site.

3. Click the **[✔Save Config]** button to save your settings.

> ✔ *The Private Sales website restriction settings can be also used for B2B websites. Customers can be created in the backend and required to log in in order to view the site.*

## Restricting customer access on a category-by-category basis

### To configure default access permissions and landing pages

In order allow specific customer groups to see only certain categories of your website, you first need to enable this ability in the Admin Panel. You can set default values that apply to all categories in your entire store.  You can also override these settings for individual categories.

1. Choose **System > Configuration**. Select the **Catalog** tab on the left.
2. In the **Category Permissions** panel, you can set the following values:
   - **Enable** - Determines whether or not category access can be restricted.
     - **Yes**, frontend website access is restricted in the manner set in the fields below. A new tab (**Category Permissions** ) will appear at the category level in **Catalog > Manage Categories** so that you can override these settings on a category-by-category basis.
     - **No**, this feature in disabled and the following settings have no effect.
   - **Allow Browsing Category** - Determines whether category pages are visible and to which customers.
     - **Yes, to all** in order to give this permission to all customer groups.
     - **Yes, to specified customer groups** in order to give this permission only to certain customer groups.
     - **Customer Groups** multiple select menu will appear listing all existing customer groups, from which you can select the group or groups to give this permission.
     - **No, redirect to landing page** in order to deny this permission to all customer groups.

- **Landing Page** - Select the landing page that customers will be directed to if they do not have permission to browse categories. Customers will be redirected if you have selected either **Yes, to specified customer groups** or **No, redirect to landing page** above. They will also be redirected if you deny access to a customer group on the category level, which will be discussed further in the next section. This dropdown lists all landing pages that have been created in **CMS** > **Manage Pages**.

- **Display Product Prices** - Determines whether product prices are displayed on the product listing pages and product info pages.
  - **Yes, to all** in order to give this permission to all customer groups. Select **Yes, to specified customer groups** in order to give this permission only to certain customer groups.
  - If this option is selected, a **Customer Groups** multiple select menu will appear listing all existing customer groups, from which you can select the group or groups to give this permission. Select **No** in order to deny this permission to all customer groups.
- **Allow Adding to Cart** - Determines whether customers are able to add products to their carts from the product listing pages and product info pages.
  - Select **Yes, to all** in order to give this permission to all customer groups.
  - Select **Yes, to specified customer groups** in order to give this permission only to certain customer groups. If this option is selected, a **Customer Groups** multiple select menu will appear listing all existing customer groups, from which you can select the group or groups to give this permission.
  - Select **No** in order to deny this permission to all customer groups.
- **Disallow Catalog Search by** - Select the customer group or groups from this multiple select menu that will not be allowed to use the Quick Search bar in the header or the Advanced Search tool to search for products in your site.

3. Click the **[✔Save Config]** button to save your settings.

## To apply category permissions

The default category permissions that you set above can be overwritten on the category level. To do so, navigate to **Catalog** > **Manage Categories**, select the desired category from the category tree in the left column, and select the **Category Permissions** tab. This tab will only exist if you have enabled this feature in the configuration settings described above.

Here you have the ability to set permissions for each website and each customer group. First, click the **New Permission** button. Select the desired website and customer group from the corresponding dropdowns. If you want to apply this permission for all websites and/or customer groups, select **All Websites** or **All Customer Groups**, respectively.

For each type of permission (browsing, product prices, and add to cart) you have the ability to **Allow** or **Deny** permission. Additionally, you can choose to use the permission of the parent category, **Use parent**. This setting is helpful if you have a child category or set of children categories which will always follow the permission settings of the parent. This way, you can change the permission settings of the parent category and have the changes automatically apply to the child or children categories.

Each permission (browsing, product prices, and add to cart) will apply to the product listing (category) page of the selected category, as well as the product view (product) page of products associated to the selected category. However, if a product is associated to another category, which has no viewing or selling restrictions, then none of the permissions will apply to the product view page.

To remove a permission, click the red **X** button.

When you have completed these settings, click the **Save Category** button in the top right of the page.

# 2 Content Staging Websites [EE]

This chapter introduces Enterprise Edition's content staging functionality, which allows you to create beta Websites that are visible only to store administrators. Some of uses of these sites include data entry, preparing and testing seasonal layout and data changes, and new CMS content.

> ! *It's important to understand that these websites are content staging websites and are not staging websites for code or development work.*

## Content Staging Logic and Workflow

In order to efficiently use content staging, it is necessary to understanding the way it works. Content staging Websites are created as hidden or beta Websites that can be accessed via a special URL, either on the same domain as the live store or on a separate domain. In the backend, the Staging Websites can be used in the same way as normal Websites. During merging, all the content assigned to the Staging Website will become assigned to the live Website, and all attributes on the Staging Website/Store View level will be copied to the matching live Website/Store View. All mapping and content selection details can be controlled. Additionally, during merging, a rollback (backup) can be created.

## Setting up Content Staging Websites

### ▶ To configure your content staging websites:

There are some configuration settings that must be completed relating to content staging. To do so, navigate to **System** > **Configuration**, click the **General** tab in the left column, and select the **Staging Websites** section.

- **Automatically create Entry Points for Staging Websites** - Determines if the entry points (index files) for beta sites are created automatically. If you plan to host your Staging Websites on a separate domain, select No.
- **Folder Name for Entry Points** - Entry points, if created automatically, will be created as subdirectories in this path. This folder must be writeable.
- **Close Website during Merge or Rollback** – Determines if access will be restricted to the live site while the merge or rollback is being performed.
    - If you select **No**, the site(s) can be accessed as usual.
    - **Take down entire frontend** means access to all sites will be restricted, and is the recommended option.

    - **Take down only relevant websites** means access will be restricted only to the site(s) involved in the merge or rollback activity.
- **Landing Page** – Select the CMS page that will be shown if the site is closed during a merge or rollback activity.

When you have completed these settings, click **Save Config** in the top right of the page.

### To create a new content staging website:

Magento Enterprise Edition allows you to create as many Staging Websites as required.

1. Navigate to **System > Content Staging > Staging Websites**. This page contains a grid listing all existing Staging Websites.
2. Click Add Staging Website.
3. Select one of existing websites as the base in the **Source Website** dropdown and click **Continue**.
4. Configure the staging environment with the following options:
    - **Label** - Unique name assigned to the staging environment so that it is easily recognizable.
    - **Staging Website Code** - Unique website code of the Staging Website. This field will be pre-populated with and automatically generated code, although you have the ability to modify the value.
    - **Staging Website Name** - Name of the Staging Website. This field will be pre-populated with and automatically generated name, although you have the ability to modify the value.
    - **Base URL** and **Secure Base URL** - Base address of the Staging Website. If the website is to be hosted on a separate domain or in a non-default location, enter a new value.
    - **Frontend Restriction** - Controls how the frontend of the Staging Website can be accessed. The following options are available:
        - Not accessible - Disables access to the entire staging frontend.
        - **Accessible** – The staging site is open and can be accessed by anyone that knows the URL.
        - **Require HTTP Auth** – The staging site will show a username and password prompt on access, which can be configured below.
    - **HTTP Login** and **HTTP Password** - Enter the username and password used for restricting frontend access when the Frontend Restriction dropdown above is set to Require HTTP Auth.
5. **Select Original Website Content to be Copied to Staging Website** – This section determines which items will be copied to the Staging Website from the source Website.

6. **Select Original Website Store Views to be Copied to Staging Website** – This Section determines which Store Views will be copied to the Staging Website from the source Website.

7. When you have completed these settings, click **Create**. You will be redirected to the Staging Websites grid.

Now you can start editing content, assign it to the Staging Website, and change attributes on the Website or Store View level of the Staging Website.

You can also edit the staging environment by clicking on the desired Staging Website in the grid. While editing, you can change the Label and Frontend Restriction options. You can also view the **Event History** tab, listing all events (creation, merge, or rollback) that were done in this site.

> ✔ *You can also create Staging Websites based on other Staging Websites. This allows more people to work on different parts of the new content. The content can be merged to the beta Website, fully tested and reviewed, and finally merged to the production (live) Website.*

# Merging Content

After making all the necessary content changes on the Staging Website you can merge or schedule merging of the Staging Website to another Website.

### ▶ To merge or schedule merging of a Website:

1. Navigate to System > Staging Environments > Staging Websites.

2. Click on the staging environment in the grid that you want to merge.

3. Click Merge to open the mapping configuration page.

4. In the top section, define the mapping of the Websites and Store Views. This controls which Staging Website is merged to which live Website, and which staging Store View is merged to which live Store View.

   - Select the **To** Website, which is the target Website. The To website can be either the Source Website, or another Website.
   - Click Add New Store View Map.
   - Select the **From** and **To** Store Views. Each From Store View option can only be selected once.
   - Repeat adding Store View maps for all Store Views that need to be merged.

5. Select the **Create a backup** checkbox if you want to create a backup of the live site before merging.

6. In the **Select Items to be merged** section, check all items that you want to merge from the staging to the live website.

7. Click **Merge Now** or enter a date and time and click **Schedule Merge**.

> ! *You can only create one backup for each website per merge. Backups are created in the database and require significant database space. Backups are not updated when Magento is updated. If the table structure is changed during an update, there will be no way to restore the backup.*

> ! *For a scheduled merge to be applied, the Magento cron job has to be running on the server.*

# Content Rollback

If you have selected the **Create a backup** checkbox during website merging, a backup of the target Website will be created just before the merge. This backup only contains the tables related to the content staging merge and is not a backup of the entire site.

### To rollback website content:

1. Navigate to **System > Staging Environments > Backups**. This page contains a grid listing all existing backups.

2. Click on the backup in the grid that you want to roll back. You will be redirected to the Website Backup Information page. This page has three tabs available in the left column:

   - **Backup General Info** - Displays the basic backup information. **Table Prefix** is the prefix used for backup tables of this website in the database.
   - **Rollback History** - Displays events associated with this backup.
   - **Rollback** - Contains the list of items which are available for rollback.

3. In the **Rollback** tab choose the items that you want to restore. You can only select the items which are **available**.

4. Click the **Rollback** button. After the website is restored, you will be redirected to the backup grid.

! *Items are available for rollback only if the table versions of the backup and original Website match. If they do not match, the rollback is not possible with Magento functionality. It can be carefully performed using manual database administration tools, however this is not recommended. The table version might change when an upgrade of the Magento system also changes the structure of some of the tables.*

! *Rollback can be used either to restore content if an error is noticed after a merge, or to restore to a previous site version when the staging site is used for seasonal or temporary Website changes.*

# Cautionary Notes About Content Staging

Content staging is a very powerful tool, but requires caution to use it effectively. An important thing to understand is that the Staging Website it is not a separate beta Website with a separate database. It is another Website in the store that is hidden. Thus, creating and deleting content, such as products, requires special attention.

### ▶ To remove a product from a staging website:

You cannot and should not “delete” a product from a content staging website. Deletion of the product in staging will result in deletion from the live site as well. To remove a product from a content staging website, you should simply disable it in that website.

1. Navigate to **Catalog** > **Manage Products** and select the desired product from the grid.
2. In the **Websites** tab, uncheck the Staging Website that you wish to de-associate from the product. Alternatively, you can change the **Choose Store View** scope dropdown to the desired Staging Website, navigate to the **General** tab, and select **Disabled** in the **Status** dropdown. Click **Save** when you are finished. This will remove the product from the Staging Website, but it will still exist in the production site until a merge is performed.
3. Merge the Staging Website into the production Website by following the steps in the previous section of this chapter.

The product will be unassigned to or disabled in the Staging Website as well as the production Website. Now you can safely delete the product, as it is no longer used.

### ▶ To create a product on a staging website:

1. Navigate to Catalog > Manage Products and click Add Product.

2. Create the product as usual and assign it only to the Staging Website on the Websites tab. Save the product.
3. Merge the Staging Website into the production Website by following the steps in the previous section of this chapter.

Now the product will be available in both the staging and production Websites.

Similar steps should be taken when working with other types of content.

Special care has to be taken when upgrading Magento. Upgrades will modify Staging Websites but will not modify the backups, and in many cases (if the upgrade modifies content tables) this can render the backup unusable. It is advisable to perform upgrades before working on Staging Websites, or after a merge is performed, confirmed and no rollback is expected to be used.

# 3 Performance Enhancements [EE]

## Full-Page Caching

Full-page caching is an Enterprise Edition performance enhancement that provides quicker loading time for frontend pages by caching the entire contents of pages. Rather than retrieving page information from the database each time the page is loaded, that information will be pre-generated and stored. With EEv1.8, full-page caching can also cache recently viewed products as a dynamically cached block further improving page load speeds.

### To configure full-page caching

There are some configuration settings that must be completed relating to Full Page Caching. In order to do so, navigate to **System > Configuration** and select the **System** tab in the left column.

The settings in the **Full Page Cache Settings** section control the page cache which is generated after a visitor visits a page for the first time. Pages that are never visited will not be cached. The following options are available:

- **Cache Lifetime (minutes)** – Determines the number of minutes after which the page cache will be removed. A new page cache will be created the next time a visitor visits the page after the previous cache has been removed.
- **Maximum Allowed Page Depth** – Determines the number of parameters for each page that will be cached. For example, each layered navigation filter applied to a page is another parameter. If the page depth is limited to two, each filter will be cached, as well as any combination of two filters. However, combinations of three or more filters will not be cached. This allows control over the number of cached files that will be stored.
- **Enable Cache For Not Default Currencies** – Determines whether pages containing currencies other than the default currency will be cached. This also allows for control over the number of cached files that will be stored.

The settings in the **Full Page Cache Auto Generation** section control the page cache which is generated automatically via crawlers. This will create more cached pages than the page caching from the previous section, as pages will be cached even if they are not visited. This will also allow the initial visitor to a page to avoid the load time, as the cached page file will already exist. The following options are available:

- **Enable Pages Cache Auto Generation** – Select Yes to enable this feature.
- **Crawler Threads Number** – Determines the number of parallel requests during this process. A higher number will reduce the amount of time required to cache all pages, however it will also require more system resources.

- **Generate Pages Cache For Not Default Currencies** – Determines whether pages containing currencies other than the default currency will be cached. This also allows for control over the number of cached files that will be stored.

# Cache Management

The Full Page Cache can be manually managed by navigating to **System > Cache Management**. Select the checkbox next to Cache Type **Page Cache**. From the **Actions** dropdown, select whether to enable, disable, or refresh the page cache. This controls both the visitor-generated and auto-generated cache described above. This cache only applies to visitors who do not have saved session data. Any users who do have a session will not view fully cached pages.

# 4 Security Enhancements [PE] [EE]

This chapter introduces Magento Enterprise Edition encoding and security features, matching PCI standard requirements.

## Encryption and Hashing

Magento Enterprise Edition hashes all data that does not require decryption by using a strong SHA-256 hashing algorithm instead of the previously used MD5. Legacy passwords will be hashed using the new algorithm whenever they are entered by customers, and all new passwords will be hashed using the SHA-256 algorithm.

Magento Enterprise Edition also encrypts all data that does require decryption by using an industry-standard AES-256 algorithm. This includes credit card data and integration (payment and shipping modules) passwords.

## Changing the Database Key

Magento Enterprise offers a tool to change the database key that is used for data encryption and decryption. This database key was generated when Magento was originally installed in your production environment. The key should be changed if the old key is ever compromised, as well as on a regular basis to improve security. When the key is changed, all legacy data is re-encoded using the new key.

### ▶ To change the encoding key:

1. Navigate to System > Manage Encryption Key.
2. Select whether or not the new encryption key will generate automatically. If not, a New Key field will appear in which you can manually enter a new key.
3. Click the Change Encryption Key button in the top right of the page.

The encryption key will be changed and all previous data will be encoded with the new key. The new encryption key will be displayed for reference.

> ! *Please make a note of the new key and keep it in a safe place. It will be required in order to decrypt data if any problems occur with your files.*

## Logging Administrator Actions

Logging of administrator actions allows tracking of backend activities. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object on which the action was performed. Additionally the IP and date are always logged.

### To configure logging:

By default, all available modules are logged. To configure which modules are logged, navigate to **System** > **Configuration**, click the **Admin** tab in the left column, and select the **Events Logging** section. Locate the module you wish to edit and select Yes to enable it or No to disable it.

Additionally, you can control how long the log entries are stored and how often they are archived. To edit these settings, click on the **System** tab in the left column and select the **Event Log Archiving** section.

- **Save Log, days** - Determines how long the log entries are stored in the database before being removed. If there are many administrators working on the site, you can change this value from the default (60 days) to a lower value to avoid filling the capacity of the database.
- **Log Archiving Frequency** - Determines how often old events are saved to the archive. Possible values are Daily, Weekly or Monthly.

✔ *For log cleaning to work, the Magento cron job has to be set up. More information is available here: http://www.magentocommerce.com/wiki/how_to/how_to_setup_a_cron_job*

## Logs Report

To view the actual log of admin actions, navigate to **System** > **Admin Actions Log** > **Report**. This page is in a grid format, allowing you to sort and filter by values such as timestamp, IP address, user name, and module. If applicable, the Item_id will display the ID of an affected item, such as customer ID, order ID, or product ID. The log report can be exported to CSV or XML using the **Export to** dropdown and **Export** button.

## Logs Archive

To access the log archive files, navigate to **System** > **Admin Logging** > **Archive**. This page lists the CSV log files stored in *var/admin_logs*. By default, the filename will contain the current date in the format (iso) yyyyMMddHH.csv. Filenames are linked to download the appropriate file.

# Setting Administrator Password Security Levels

There is a set of options controlling administrator password security. The following settings are available by navigating to **System** > **Configuration**, clicking the **Admin** tab in the left column, and selecting the **Security** section:

- **Maximum Login Failures to Lockout Account** - Determines the number of consecutive failed login attempts that will cause that account to become locked. If you do not want to enable the lockout feature, leave this field blank.
- **Lockout Time (minutes)** – Determines the duration, in minutes, for which the account will be locked after the failed logins.
- **Password Lifetime (days)** - Determines the duration, in days, until Magento will request an administrator to change their password. If you do not want to enable the password lifetime feature, leave this field blank.
- **Password Change** - Determines if the administrator is required to change their password after the password expires (option **Forced**), or if the password change is optional and a notification message is displayed (option **Recommended**).

✔ *During an account lockout, other administrators can unlock the account by navigating to **System** > **Permissions** > **Locked Users**.*

# PART II— CATALOG AND CONTENT MANAGEMENT FEATURES

# 5 Enhanced Content Management System (CMS+) [EE]

This chapter introduces the enhanced content management system, CMS+.

## Widgets

Widgets are configurable and reusable page blocks that allow you to display dynamic (or static) content in the frontend. For example if you wanted to display all best sellers for a specific category on the top part of the category page you can use a widget rather than custom coding that capability.

### To create a new Widget:

Navigate to **CMS > Widgets** and click **Add New Widget Instance**.

You will need to select the type and theme to use to for this Widget, which cannot be changed after it has been created. The Widget type will determine which configuration options display in the Widget Options tab in the next step.

After clicking **Continue**, configure the Widget with the following options:

- **Frontend Properties** – For the most part, all Widgets types have the same options in the Frontend Properties tab. You can set the name, Store View(s), and sort order. The sort order is only relevant when two or more widgets both display in the same section of the same page. This placement is determined in the **Layout Updates** section. Click **Add Layout Update** to create a rule defining where this Widget will display. You can add multiple Layout Updates. In the **Display On** dropdown, select on which type of page this Widget will display. You can choose from category pages, product pages, or other specific pages. If you choose a type of category or product, you can then choose specific categories or products, respectively. If you choose a specified page, you must then choose the page (or select a format of page to use, i.e. all pages with a left column). Then, in the **Block Reference** dropdown, select the location on this page where the Widget will be placed. All Widget types can be placed in the left, center, or right column, but some can also be placed in the header or footer. Lastly, choose the **Template**. Some Widget types only have one template, and therefore there is no ability to select. Link Widget types and product listing Widget types will have multiple template options to choose from.

- **Widget Options** - The options in this tab depend on which type you initially selected.
    - **Banner Rotator** - This Widget allows you to display one or more previously created Banners. Banners are a new Magento feature which will be discussed in more depth below. From the **Banners to Display** dropdown, you can select if the Banners are all related to a Shopping Cart or Catalog Price Rule, in which case they will only display if the rule is active and applied. You will be able to associate a Banner with a price rule when creating the Banner. Depending on your selection from that dropdown, you will be able to choose which specific Banners to use. If you selected **Specified Banners**, then you will be able to choose each Banner individually from the grid below. If you chose Banners associated to a Shopping Cart or Catalog Price Rule, then you will need to select the **Banner Type** from a dropdown. Banner Type is set on the Banner level, and will help you ensure that the Banners will fit the Block Reference that you chose in the previous tab. From the **Rotation Mode** dropdown, you can select how to display the Banners if you have chosen more than one for this Widget. You can display them all at once or rotate them. If you rotate them, you can also choose if they will rotate randomly, in a series (they will rotate in order based on position), or shuffled (they will all display once in a random order, and then start over).
    - **CMS Hierarchy Node Link** – This Widget allows you to link to a CMS Node or page. Choose the Node or page by selecting it from the Hierarchy tree. Only pages which are part of the Hierarchy can be linked to using this Widget type. CMS Hierarchy is a new Magento feature, and will be discussed in more depth below. In addition to choosing the Node or page to link to, you can also customize the text of the link.
    - **CMS Page Link** – This Widget allows you to link to any existing CMS page. Choose the page by selecting it from the grid. You can also customize the text of the link.
    - **CMS Static Block** – This Widget allows you to insert an existing Static Block. Choose the Static Block by selected it from the grid.
    - **Catalog Category Link** – This Widget allows you to link to a category. Choose the category by selecting it from the category tree. You can also customize the text of the link.

  - **Catalog Events Carousel** – This Widget allows you to insert the Events Carousel. Catalog Events are a feature of the Enterprise Edition, and were introduced in the previous Version 1.3 release. They are discussed in more depth in Chapter 8 above. You can customize the number of Events to display at once in the Carousel, the number of Events to scroll each time the scroll arrows are clicked, and the width of the Carousel, so that it will fit into the Block Reference that you chose in the previous tab.
- **Catalog New Products List** – This Widget allows you to insert the new products block. Products will display in this block if the **Set Product as New From/To Date** range, configured on a per product level, includes the current date. You can customize the number of products to display at once, as well as the cache lifetime.
- **Catalog Product Link** – This Widget allows you to link to a product. Choose the product by selected in from the grid. The category tree allows you to filter the product results in the grid. You can also customize the text of the link.
- **Recently Compared Products** – This Widget allows you to insert the recently compared block. You can customize the number of products to display at once.
- **Recently Viewed Products** – This Widget allows you to insert the recently viewed block. You can customize the number of products to display at once.

# Banners

Banners are another feature in Magento which allow you to display blocks of information on the frontend. These blocks can contain static content and Widgets. They can also be configured to display only to certain types of customers, or when certain price rules are applied.

To create a new Banner, navigate to **CMS > Banners**. After clicking **Add Banner**, configure the Banner with the following options:

- Banner Properties
  - **Banner Name** – This is for internal purposes.
  - **Active** – Only active Banners will be able to be displayed in the frontend.
  - **Applies To** – Select the Banner Type(s) from this dropdown. A Banner can be associated to multiple Banner Types. As previously discussed in the Widgets section, Banner Types are an internal tool to help you keep track of the page area for which a Banners is intended. This is due to the fact that you may design the Banner dimensions to fit a specific space. When creating a Banner Rotator Widget, you can select the Banners to use based on Banner Type. Possible Banner Types include the header, footer, left column, right column, and main content area.

  - **Customer Segments** – Customer Segments are a new Magento feature which will be discussed in more depth in Chapter 11. Essentially, they are a rule-based tool for dynamically segmenting customers by attributes such as purchase history, items in shopping cart and much more. You can associate a Banner to a Customer Segment to personalize your marketing and merchandizing of products. To do so, select **Specified** from the dropdown, and highlight the desired Customer Segment(s).

- **Content** – Enter your static HTML content in the text area. You can also insert Widgets and images into the content area. When you click **Insert Widget**, a pop-up window will allow you to create the Widget to insert. You will be able to choose from any of the previously mentioned Widget Types, except for Banner Rotator. The options in the pop-up window include all of the options you would see in the Widget Options tab when creating a Widget through CMS > Widgets, as well as the Template dropdown from the Frontend Properties tab. When you click **Insert Image**, a pop-up window will allow you select the image to insert from your media directory. You can also upload images from your computer to the directory in this window, and then select them to use in the Banner. If you are using multiple Store Views, you can create different content for each.
- **Related Promotions** – This tab includes one grid containing all your existing Shopping Cart Price Rules, and one grid containing all your existing Catalog Price Rules. Select the checkbox next to a Price Rule to associate it. You can associate this Banner to multiple Shopping Cart and Catalog Price Rules simultaneously. If the Banner is associated to any price rules, it will only display when that rule is applied (the price rule is active and the conditions in the rule have been met). You can also associate a Banner to a Price Rule via the Price Rule page. For both Shopping Cart and Catalog Price Rules, there is now a **Related Banners** tab in the Price Rule page. This tab includes a grid containing all existing Banners, which can be associated by selecting the checkbox next to the Banner.

# Versioning

Magento's new Versioning system for CMS pages allows you to create multiple Versions of a page, track the Revision history of each Version and restore, and separate the ability to create and publish based on permissions.

- **Enabling Versions** - When creating a new CMS page in Magento, you will be presented with the option to enable Versioning for that particular CMS page. To enable it, select Yes from the **Under Version Control** dropdown. If No is selected, only one Version will be saved, and there will be no ability to restore Revisions (this is how CMS pages functioned prior to the Versioning feature).

- **Editing Versions** - After saving the page initially, the options presented will change. In the Page Information tab, the **Currently Published Revision** will display a link to the Version that was just created. Even if the CMS page itself is not published yet (the **Status** is **Disabled**), the Currently Published Revision will display, and this will represent the Version and Revision that will display as soon as the page becomes published. To access the content section and make further edits, select the **Versions** tab. Initially, there will only be one Version listed here. When you select that Version, you will be redirected to a new page displaying the Version options and the list of Revisions for that Version.
    - **Version Label** – This is the name of your Version. It is for internal purposes, to help you differentiate between the content of the various Versions. When you want to create multiple Versions of the same page (for example, a seasonal Version and a regular Version), make sure to label your Versions appropriately.
    - **Access Level** – This sets the permissions for accessing this Version. **Private** means that only the creator of this Version will be able to access it. **Protected** means that only users with Publish Revision permissions (in System > Permissions > Roles) will be able to access it. **Public** means all users with CMS Pages permissions will be able to access it.
    - **Owner** – By default, this will be the user who created the page. The owner can be changed, which will affect access to the page if the access level is set to Private.
- Underneath these options is a grid listing all Revisions to this Version. Clicking on a Revision here will allow you to edit the content, design, and meta data. Each time an edit is made to any Revision and saved, a new Revision will be created. Alternatively, you can **Save in New Version**, which will create a new Version (in which this will be the first Revision) instead of saving this as a new Revision to the current Version.
- **Publishing Versions** - In order to publish a page, you must select the desired Revision of the desired Version, and click **Publish**. If you are currently making edits to this Revision, the Publish button will instead read **Save and Publish**, which will simultaneously create a new Revision and publish the page. This published Version and Revision will now display under the Currently Published Revision link in the Page Information tab (you may need to click Back once or twice to arrive here). Make sure that the **Status** is set to **Published** for the page to be visible on the frontend.

# Hierarchy

The CMS Hierarchy feature is a categorization tool for CMS pages, allowing users with no technical knowledge to create complex content pages and sections of content such as Articles, Knowledge Base, and more. The advantage to categorizing your CMS pages is that you will then be able to display automatically generated menus and/or pagination, to allow your customers to browse through the pages easily. To access the CMS Hierarchy, navigate to CMS > Pages > Manage Hierarchy. The Hierarchy can be managed per Store View.

- **Adding Nodes and pages -** On the left side of the page will be the Hierarchy tree. You can add Nodes and pages to this tree. A Node is used solely as folders to group child Nodes and/or pages. Nodes cannot be viewed on the frontend. If a customer visits a Node on the frontend, they will automatically be redirected to the first page under that Node. Pages can be viewed on the frontend, but they can also be used as folders to group child Nodes or pages. To add a Node to the tree, click **Add Node** on the right of the tree. The Node will be added to whatever folder (whether Node or page) is currently highlighted. To add a page or pages to the tree, select them from the grid below, and click **Add Selected Page(s) to Tree**. The page(s) will be added to whatever folder is currently highlighted. A page can only be added to a folder once, so it will become inactive in the grid below when that folder is highlighted. However, pages can be added to multiple folders.
- **Node and page options** – When a Node or page is highlighted, you will be able to edit the option on the right of the tree.
  - **Properties** – Here you can edit the title and url key. They can only be edited for Nodes, because the title and url key for pages are set in CMS > Pages > Manage Content. You can also preview the frontend. When previewing Nodes, you will be redirected to the first page under that Node.
  - **Render Metadata in HTML Head** – This section will only appear for top level Nodes and pages. It is used for SEO purposes to define the structure of the Hierarchy
  - **Pagination Options for Nested Pages** – This section will only appear if child Nodes or pages have been created under the currently highlighted Node or page. They will only control the pagination for the immediate child Nodes or pages (i.e. pagination options for a top level Node or page will control 1st level child Nodes and pages, pagination options for a 1st level child Node or page will control 2nd level child Nodes and pages, etc.). If pagination is enabled, then links to the previous and upcoming pages will appear above and below the page content on the frontend. They will link to the other ‘sibling’ pages. You can also control the number of page links to display at once.

- **Navigation Menu Options** – If the navigation menu is enabled, then a menu similar to the category tree will appear on the frontend, above the page content. For each Node, you can control the number of parent and child levels to display in the menu, as well as the list options for the menu (i.e. numbered list, bulleted list, etc.).

Hierarchy can also be managed on the CMS pages themselves. To do so, select a page and click the Hierarchy tab in the left column. The Hierarchy tree will display, with a checkbox next to each Node and page. You can associate this CMS page to multiple Nodes or pages.

# WYSIWYG

A WYSIWYG (What You See is What You Get) editor for CMS pages now gives you two ways to style your content. This editor has been embedded from TinyMCE. More information can be found about this editor at http://tinymce.moxiecode.com/. With the **Show/Hide Editor** button, you can toggle between the WYSIWIG mode, where the style and page elements are controlled using the toolbar of buttons, and the standard HTML mode, where these elements are controlled using HTML tags. Content already in the page will also convert automatically to match the mode. Styled content in WYSIWYG mode will reveal the tags in HTML mode, and visa versa.

- **WYSIWYG mode** – There are some TinyMCE WYSIWYG features which should be pointed out, as well as some additional Magento features which have been incorporated into the editor.
    - **Insert Widget** – This button allows you to insert a Widget into the CMS page. A pop-up window will allow you to create the Widget to insert. You will be able to choose from any of the previously mentioned Widget Types. The options in the pop-up window include the all of the options you would see in the Widget Options tab when creating a Widget through CMS > Widgets, as well as the Template dropdown from the Frontend Properties tab.
    - **Insert/edit Image** – This button allows you to insert an image into the CMS page. A pop-up window will allow you to configure the image. Enter the image path, or (in a second pop-up window) browse and select the image to insert from your server directory. If browsing, you can upload images from your computer to the directory in this window, and then select them to use in the CMS page. In the original pop-up, you can also set other information regarding the image, including description, title, styling, and mouse over effects.

  - **Insert/edit embedded media** – This button allows you to insert various types of media into the CMS page. A pop-up window will allow you to configure the media. Select the media type (Flash, QuickTime, Shockwave, Windows Media, or Real Media), and enter the media path, or (in a second pop-up window) browse and select the media to insert from your server directory. If browsing, you can upload media from your computer to the directory in this window, and then select them to use in the CMS page. In the original pop-up, you can also set other information regarding the media, including dimensions and styling.

- **HTML mode** – In HTML mode, you still have the ability to insert Widgets and images. The only difference is that for inserting images, you will immediately be taken to the server directory pop-up, and will not be able to set the description, styling, etc. These must be set using HTML tags.

# 6 Catalog Search with Solr [EE v1.8+]

Solr is a powerful search engine that supports stemming, plurals, replacements, layered navigation and more. Solr is not bundled with Magento and must be installed separately by your hosting firm or sys admin, but it is fast and enterprise ready and available for all Unix systems.

The Solr search feature in Magento Enterprise Edition v1.8 allows you to choose between using the default Magento MySQL-based search or using an external Solr server for product searches on the frontend. When you enable and configure Solr, the quick search will be redirected to the Solr server and Magento will present results in exactly the same way as it would with the default MySQL-based search.

Depending on the store, Solr search can provide more relevant search. It is especially recommended for sites expecting heavy traffic and search loads. Products are added to search engine index as each product is saved in the Admin Panel so the index is kept up to date without any need for manual intervention.

Currently the Solr search does not offer layered navigation. So even if you enable the Solr search, the advanced search currently will continue to use the Magento-native MySQL search.

> **!** *While we are unable to provide support for configuring Solr server we can provide Solr configuration and schema files to help your hosting firm or sys admin with initial server configuration. Please contact the support team for assistance.*

### ▶ To enable Solr for product searches:

1. Choose **System> Configuration**. Select the **Catalog** tab on the left.
2. In the **Catalog Search** panel, enable Solr by setting the following values:
   - **Search Engine**—Select **Solr** to enable Magneto to use the Solr search engine. Select **MySql Fulltext** to use the Magento-native search.
3. Click the **[✔Save Config]** button to save your settings

# 7 Inventory Control Enhancements [EE v1.8+]

All editions of Magento have robust inventory control capabilities that allow you to set and manage inventory levels and thresholds and auto-decrement inventory as it's sold from the website. In addition, Magento Enterprise Edition has additional capabilities that provide you with even more control.

## Quantity Increments & "Only X Left"

One of the new inventory control features that are available with Magento Enterprise Edition v1.8 is the ability to set the allowed quantity increments when customers add an item to their carts. This is especially relevant for B2C sites that sell items in multi-packs or B2B sites that sell in cases or cartons.

Another new inventory feature is the ability to message on the frontend when an item is nearly out of stock with an "Only 5 left" type message. This helps add urgency and improve conversion, which can be especially helpful for moving those last couple of items.

EEv1.8 also offers some support for setting order minimums on a customer-group basis, but this can only be set globally for that customer group at this time.

### ▶ To enable and configure additional inventory control options:

In order to take advantage of these new inventory control features, you first need to enable them in the Admin Panel. In addition, you have the option of setting some of the default values for your entire store, if that makes sense for your merchandise. If not, you can set specific thresholds and increments on a product-by-product basis.

1. Choose **System> Configuration**. Select the **Inventory** tab on the left.
2. To enable the "Only X left" feature for a website, in the **Stock Options** panel set the **Only X left Threshold** value to your desired threshold. If the value is 0, the feature will not be enabled. This value can be set differently for each Magento website in your installation but it cannot be set on a per-product basis. Whatever you set here will apply to the entire website you have selected in the Configuration Scope selector.
3. To globally enable the Quantity Increments feature, in the **Product Stock Options** panel set **Enable Qty Increments** to **Yes**. Enter the desired default increment in the **Qty Increments** field that appears when you change this field to Yes. You can override these values for each product, if desired.

4. To globally enable the minimum purchase quantities for specific customer groups, in the **Product Stock Options** panel click the **[+Add Minimum Qty]** button. Select the customer group from the drop-down list and enter the quantity minimum desired. This is a global setting and cannot be overridden on a per-product basis.
5. Click the **[✔Save Config]** button to save your settings.

### ▶ To set quantity increments on a per-product basis:

1. Choose **Catalog> Manage Products**.
2. Select a product to edit and then select the **Inventory** tab on the left.
3. In the **Inventory** panel, enable the “Only X left” feature by setting the **Only X left Threshold** value to your desired threshold. If the value is 0, the feature will not be enabled. This value can be set for each Magento website.
4. In the **Inventory** panel, enable the Quantity Increments feature for this product by setting **Enable Qty Increments** to **Yes**. Enter the desired increment in the **Qty Increments** field that appears when you change this field to Yes.
5. Click the **[✔Save]** button to save your settings.

# Part III—
# Marketing and Promotion Features

# 8 Rich Merchandizing Suite (RMS) [EE]

This chapter introduces Magento Enterprise Edition's Rich Merchandizing Suite (RMS) of features.

## Targeted Marketing Using Customer Segments

Customer Segments allow you to dynamically identify customer groups based on specific characteristics, from address information, order history, shopping cart contents, and more *and to dynamically target different content and promotions to those groups*. You can then generate reports and export the customers, as well as optimize marketing initiatives based on those segments including Shopping Cart Price Rules and Banners. Customer Segment information constantly refreshes, so that customers can become associated and de-associated to a Segment as their information changes.

### ▶ To create a new Customer Segment

Navigate to **Customers > Customer Segments**. After clicking **Add Segment** configure the segment with the following options:

- General Properties
    - **Segment Name** - This is for internal purposes.
    - **Description** - This is also for internal purposes, and provides an optional space to enter more detailed information than can be contained in the Segment Name.
    - **Assigned to Website** - A Customer Segment can only be assigned to one Website, because the conditions can use information that is specific to each Website. To use the same conditions on multiple Websites, you must create multiple Segments.
    - **Status** - Select **Active** to enable this Segment. Price Rules and Banners associated to this Segment can be unassociated by selecting **Inactive**, without having to edit the Price Rule or Banners.

- **Conditions** - In the Conditions tab you can define the rules by which customers will be associated to this Segment. These rules are defined in a similar manner to those of Shopping Cart and Catalog Price Rules, with different options. There are 5 main characteristics upon which these rules can be based.
  - **Customer Address** - You can define any of the address fields, such as city or country. Any address in a customer's address book can match these conditions for the customer to match. Or, you can specify that only the default billing or shipping addresses can be used to match a customer.
  - **Customer** – Miscellaneous customer information can be defined, including Customer Group, name, email, newsletter subscription status, and Store Credit balance.
  - **Shopping Cart** – Shopping Cart characteristics can be based on either quantity (line items or total quantity) or monetary amount (grand total, tax, gift card, etc.) currently in the shopping cart.
  - **Products** - You can define products that are in the shopping cart or wishlist, or that have previously been viewed or ordered. You can also set a date range for when this occurred. The products are defined using product attributes. There is a new setting in the attribute management page called **Use for Customer Segment Conditions**, which must be set to Yes for the attribute to appear in this section.
  - **Sales** - Order characteristics for past orders can be defined based on the billing/shipping address in the order, the total or average amount or quantity of the orders, or the total number of orders. You can also set a date range for when this occurred, and the order status of the orders that match these conditions.
- **Matched Customers** - This tab will only appear for previously created Segments. It will be discussed in the Reports section below.

## Reporting Based on Customer Segments

Reports for Customer Segments can be generated in two locations. You can navigate to Customers > Customer Segments, and select an existing Customer Segment from the grid. Then, click on the Matched Customers tab. This tab will only exist for previously created Customer Segments, so it will not display when creating a new Segment. The number of customers that currently match the conditions of this Segment will display in the tab in parentheses. To refresh the Segment data, and get the most up-to-date list of matched customers, click **Match Customers** at the top of the page. The list of customers can be exported to CSV or Excel using the **Export to** dropdown, and clicking **Export**. The second location where a report can be generated is Reports > Customers > Customer Segments. Select an existing Customer Segment. The report can be generated using the same Export options. In future releases, this report will also allow you to quickly cross-reference Customer Segments.

## Promotions Based on Customer Segments

In order to utilize these Customer Segments for marketing purposes, you can associate them to Shopping Cart Price Rules or Banners.

- **Shopping Cart Price Rules** – To associate a Segment to a Shopping Cart Price Rule, navigate to Promotions > Shopping Cart Price Rules, click Add New Rule or select an existing Shopping Cart Price Rule from the grid, click the Conditions tab, and select Customer Segment as a condition in the dropdown. You can specify the Segment to use from a grid listing all of the existing Segments.
- **Banners** – To associate a Segment to a Banner, navigate to CMS > Banners, click Add Banner or select an existing Banner from the grid, and select Specified from the Customer Segments dropdown. This will open a multi-select menu including all existing Segments. You can associate multiple Segments to a Banner.

# Creating Dynamic Product Relationships

Rule-Based Product Relations offer further targeted merchandizing to your customers. You will be able to suggest products for customers through automated rule-based selection of products to be used for related items, up-sells, and cross-sells. To create a new Rule-Based Product Relation, navigate to Catalog > Rule-Based Product Relations. After clicking **Add Rule**, configure the Rule-Based Product Relation using the following options:

- Rule Information
  - **Rule Name** – This is for internal purposes.
  - **Priority** – When multiple rules overlap on a product page or the shopping cart, the priority will determine the sort order of each group of displayed products. For example, if Rule 1 (with priority 1) displays three products, and Rule 2 (with priority 2) displays five products, and both rules apply to the same product's up-sells list, then the three Rule 1 products will always display before the five Rule 2 products. However, the sort order of the Rule 1 products relative to one another is random. Additionally, if there is a mix of rules and manually added products, the manually added products will always display before the rule-based products. Products can be manually added by navigating to Catalog > Manage Products, clicking Add Product or selecting an existing product from the grid, and selecting the Related Products, Up-sells, or Cross-sells tab. From these tabs, you can manually select which specific products will display.
  - **Status** – Select **Active** for this rule to apply.
  - **Apply To** – Select whether this rule will apply to a product's **Related Products**, **Up-sells**, or **Cross-sells**.

    - **From/To Date** – You can select a date range in which the rule will automatically become enabled and/or disabled.
    - **Result Limit** – You can set a limit for the number of products that will be displayed. The maximum number is 20, but you can set a smaller limit. For example, if you are creating an Up-sell rule, and there are 40 products which match the conditions in the Products to Display tab, you can set the limit to 10. This will automatically choose 10 of those 40 products, which will then rotate through the Up-sells block. The advantage to setting a lower limit is that it reduces the processing time.
- **Products to Match** - In this tab, set the product conditions to determine which products will have this rule applied to it. These conditions are defined in the same manner as Catalog Price Rules, whereby the products are defined using product attributes. There is a new setting in the attribute management page called **Use for Target Rule Conditions**, which must be set to Yes for the attribute to appear in this section.
- **Products to Display** – In this tab, set the product conditions to determine which products will be displayed in the Related Products, Up-sells, or Cross-sells blocks. The conditions are almost identical to those of the Products to Match tab, with one additional option available. You can determine which products to display based on a price relationship with the Matched Product. For example, if you want to display Up-sell products which are at least twice the price of the Matched Product, you can show only products which are 200% or more of the Matched Product price.

# Automatically Sending Reminder Emails to Customers [EE V1.8+]

The automated reminder email feature allows you to set your store to automatically send reminder emails at time interval you determine to customers who've added something to their shopping cart or wishlist but have not yet purchased. Emails can be triggered when it's X days after the shopping cart or wishlist was abandoned or you can also add other conditions like total cart value, quantity, items in cart, whether the wishlist was shared with anyone or several other conditions. Emails can go out simply as reminders to revisit the site or can have a coupon code associated with them. One of the most powerful features is that unique coupon codes can automatically be generated for each email so that you have complete control over the offers you associate with reminder emails.

### ▶ To enable and configure automated email reminders:

1. Choose **System> Configuration**. Select the **Promotions** tab on the left.
2. In the **Automated Email Reminder Rules** panel, you can set the following values:

- **Enable Reminder Emails**—Enables automated email reminders. If this is set to No all of the following values will be ignored.
- **Frequency**—Indicates with what frequency Magento should check for new customers who qualify for the automated email reminders. Choices are **Minute Intervals** (every X minutes), **Hourly** (every hour), or **Daily**.
  - **Interval** or **Minute of the Hour** should be set if Minute Intervals or Hourly are chosen
- **Start Time**—Time of day of the first check. Specified in 24-hour time based on the system time on your server.
- **Maximum Emails per One Run**—Allows to you limit the number of emails sent at the same time in any scheduled block.
- **Email Send Failure Threshold**—The number of times the reminder attempts to send out notifications to specific email address and fails. When the value is set to 0, there is no threshold, notifications will keep being sent despite any failures.
- **Reminder Email Sender**—Sets which store contact (as previously set in **System> Configuration→Store Email Addresses** tab) will be associated with the email on the From line.

3. Click the [✔**Save Config**] button to save your settings

### ▶ To create an email template for your automated email reminders:

1. Choose System> Transactional Emails.
2. Click the [**+Add New Template**] button
3. The default email template for reminder emails is called "Rule Reminder." Just to get started, select this email template from the Template dropdown and click the [✔**Load Template**] button. The contents of that template will appear in the "Template Information" panel below it.
4. Unique to the Rules Reminder email template you will see that you have the following variables available to you in email reminders. The promotion information in these variables is determined by the automated email reminder rule you set up and the coupon information in these variables is determined by the shopping cart price rule you associate with the automated email reminder rule.
   - promotion_name
   - promotion_description
   - coupon.getCode()
   - coupon.getUsageLimit()
   - coupon.getUsagePerCustomer()
5. See the *Magento User Guide* for more information on the basics of editing transactional emails. When you're done editing the reminder email template to fit your brand and needs, give it a name and click the [✔**Save Template**] button.

### To create a rule for your automated email reminders:

Before setting up an automated email reminder rule, make sure you have a shopping cart price rule set up that defines the promotion being offered

1. Choose Promotions> Automated Email Reminder Rules.
2. Click the [**+Add New Rule**] button
3. In the **Rule Information** tab, you can set the following values:
   - **Rule Name**—Name of automated reminder rule, used internally
   - **Description**— Description of automated reminder rule, used internally
   - **Shopping Cart Price Rule**—This is the promotion rule (created in **Promotions>Shopping Cart Price Rules**) that this reminder will advertise. Reminder emails may promote a shopping cart price rule with or without coupon. If a shopping cart price rule defines an auto-generated coupon, this reminder rule will generate a random, unique coupon code for each customer.
   - **Assign to Websites**—Select which websites should receive automated reminder emails based on this rule
   - **Status—Active** or **inactive**. If status is inactive all other settings will be ignore and the rule will not be triggered.
   - **Active From**—Starting date for this automated reminder rule. If no date is specified the rule will be active immediately.
   - **Active To**—Ending date for this automated reminder rule. If no date is specified the rule will remain active indefinitely.
   - **Repeat Schedule**—Number of days before the rule is triggered again and the reminder email sent again if the conditions are still met. To trigger the rule more than once, enter the number of days of each check separated by commas. For example, enter “7” to have the rule re-triggered again 7 days later; enter “7,14” to have the rule re-triggered 7 days and then again 14 days later.
4. In the **Conditions** tab, using the standard Magneto interface for promotions, you can set the following values:
   - Rules can be based either on Shopping Carts, Wishlists or both.
   - For Wishlists, available trigger conditions include: number of days abandoned, sharing, number of items, specific items in wishlist
   - For Shopping Carts, available trigger conditions include: number of days abandoned, if a specific coupon code has been applied, total line items, total items, subtotal, if items are virtual, and specific items in the shopping cart.
5. In the **Emails and Labels** tab, you can set the following values:
   - **Assign email templates to each store**—Each store in your Magento installation that you have access to will be listed here. Select the email reminder template you would like to go out to each. Leave the value here as “—Not Selected –“ if you don’t want to send this rule’s reminder email to the customers of that store.

- **Rule Title (default for all stores)**—Rule title is accessible in email templates as a variable.
- **Rule Description (default for all stores)**— Rule description is accessible in email templates as a variable.
- **Rule Title (per store view)**—Per store view override of the default title value supplied above.
- **Rule Description (per store view)**— Per store view override of the default description value supplied above.

6. Click the [✔**Save**] button to save your rule.

# 9 Gift Cards [PE] [EE]

This chapter introduces physical and virtual Gift Card products that can be purchased in the site, and Gift Card Accounts which hold balance that can be redeemed during checkout. A Gift Card Account will be created for each Gift Card product purchased.

## Configuring Gift Cards

There are some configuration settings that must be completed relating to Gift Card Accounts. In order to do so, navigate to **System** > **Configuration** and select the **Gift Cards** tab in the left column. These will be the default settings for all Gift Card products, and most can be edited on a per product level.

The following settings are available:

- **Gift Card Notification Email Sender -** Select the sender of the email that will be sent when a Gift Card Account is created. This only applies to accounts created automatically from the purchase of a Gift Card product, and does not apply to accounts created manually by an administrator. The configuration of emails sent for accounts created by an administrator will be described later in this chapter.
- **Gift Card Notification Email Template** - Select the template of the email that will be sent when a Gift Card Account is created.
- **Redeemable** - Determines whether or not the accounts that will be created for Gift Cards will be redeemable (able to be transferred to Store Credit) upon creation.
- **Lifetime (days)** - Determines the expiration date for all accounts. The accounts will expire X number of days after the Gift Card is purchased. If you do not wish to set a default lifetime, leave this field blank.
- **Allow Gift Message** - Determines whether the customer purchasing the Gift Card can add a message that will be sent to the recipient of the card (via email and/or with the shipment of the physical Gift Card).
- **Gift Message Maximum Length** - Determines the maximum allowed length of gift messages.
- **Generate Gift Card Account when Order Item is** - Determine the point at which an account is created for Gift Card products. If you select **Ordered**, the account will be created when the order containing the Gift Card is completed. If you select **Invoiced**, the account will be created when the order containing the Gift Card has been invoiced.

## Code Pool

The Code Pool is a pre-generated set of unique Gift Card codes in a specific format. Codes from the Code Pool are used each time a Gift Card Account is created. It is the administrator's responsibility to assure there are enough free codes in the code pool for the Gift Cards. Make sure to generate a Code Pool before starting to offer Gift Card products.

### To generate a new Code Pool:

1. Navigate to **System > Configuration** and select the **Gift Card** tab in the left column.
2. In the Gift Card Account General Setting panel, set the following settings:
   - **Code Length** - Determines the number of characters that will be used in all Gift Card codes, not including the prefix, suffix or separators.
   - **Code Format** - Choose whether the code will be **Alphanumeric** (a mix of letters and numbers), **Alphabetical** (letters only), or **Numeric** (numbers only).
   - **Code Prefix** - Allows you to add a value that will be appended to the beginning of all codes, and is optional.
   - **Code Suffix** - Allows you to add a value that will be appended to the end of all codes, and is also optional.
   - **Dash Every X Characters** - Allows you to determine the interval at which a dash (-) will be inserted in all codes. If you do not want to use a dash, leave this field blank.
   - **New Pool Size** – Determines the number of unique codes to be generated.
3. Click **Save Config** in the top right of the page to save the settings used for code generation.
4. Click the **Generate** button to generate the Code Pool.

> ! *If the Code Length is not long enough to allow for generating the requested number of codes, an error message will be shown.*

> ! *Depending on the settings and number of codes already used, Magento may generate fewer codes than requested.*

# Gift card accounts

Gift Card Accounts are entities which hold the balance of Gift Cards, and they can be used for paying in the store.

Gift Card Accounts can be managed by navigating to **Customers** > **Gift Card Accounts**. This page contains a grid listing all existing accounts and gives you the ability to create a new account, or edit existing accounts. To create a new account, click the **Add Gift Card Account** button in the top right of the page.

When creating or editing a Gift Card Account, there are multiple tabs. In the **Information** tab, the following options are available:

- **Active** - Determines whether or not the balance of the account can be redeemed during checkout. Also determines whether or not the balance of the account can be transferred to a customer's Store Credit.
- **Redeemable** - Determines whether or not the balance of the account can be transferred to a customer's Store Credit.
- **Website** - Determines the website in which the account can be redeemed.
- **Balance** - Determines the balance of the account.
- **Expiration Date** - Determines the date on which the account expires and becomes inactive. This is optional, and leaving it blank will mean that the account is not set to expire.
- In the **Send Gift Card** tab, the following options are available:
- **Recipient Email** - Enter the email address to which an email notification of this Gift Card Account will be sent. This field is optional, and no email will be sent if it is left blank.
- **Recipient Name** - Enter the name of the email recipient.

When you have completed these settings, click the **Save** button in the top right of the page. If you have entered a Recipient Email, click the **Save & Send Email** button. The Sender and Template of the email that will be sent is different from that of the email sent for a Gift Card product. To edit the Sender and Template of this email, navigate to **System > Configuration**, click the **Gift Card Accounts** tab, and select the **Email sent from Gift Card Account management** section.

After the Gift Card Account is saved, you will be redirected to the Gift Card Account grid page, and the newly created account will be listed. To edit any of these settings, click on the row of the account you wish you edit. You will be able to edit all of the same settings that you entered when creating the account. In addition to this, you will see the account **Gift Card Code** and **Status** in the Information tab (both of which are not editable), as well as a **History** tab which displays the balance history of the Gift Card Account.

# Gift card products

Gift Card Products are the actual products that can be purchased in the store. There are three types of Gift Card Products: Virtual, Physical and Combined.

### To create a new Gift Card:

1. Navigate to Catalog > Manage Products.
2. Click Add Product in the top right of the page.
3. Select your desired Attribute Set, select Gift Card from Product Type dropdown, and click Continue.
4. Set the Gift Card pricing in the Prices tab. Rather than having a price field like that of a Simple Product, Gift Cards have a price configuration feature similar to that of the tier price feature. You can add additional prices by clicking the Add Amount button. Each amount added will display in a dropdown on the frontend. Instead of using set prices, you also have the option of allowing the customer to enter their own gift card amount into an open field. To allow this, set the Allow Open Amount dropdown to Yes. If using this feature, you have the ability to set a maximum and/or minimum amount (Open Amount Min Value and Open Amount Max Value options) that the customer can enter into the amount field. Additionally, you can use set prices and open amounts concurrently. This will add an Other Amount option to the dropdown on the product page, which will generate an open field when selected.
5. Set the Gift Card options in the Gift Card Information tab. The following options are available:
    - **Card Type** - Determines the type of the Gift Card. The possible values are:
        - **Virtual** – The Gift Card information will be sent by email (the order will require the email address of the recipient). No shipping information will be necessary.
        - **Physical** – The Gift Card will be shipped (the order will require the shipping address of the recipient). No email will be sent to the recipient.
        - **Combined** – The Gift Card will be shipped and sent by email (the order will require both the shipping address and email address of the recipient)
    - **Redeemable** - Determines whether or not the account that will be created for this Gift Card will be redeemable (able to be transferred to Store Credit) upon creation.
    - **Lifetime (days)** - Determines the expiration date for Gift Card Account created for this Gift Card. The accounts will expire X number of days after the Gift Card is purchased. If you do not wish to set a default lifetime, leave this field blank.
    - **Allow Gift Message** - Determines whether the customer purchasing the Gift Card can add a message that will be sent to the recipient of the card (via email and/or with the shipment of the physical Gift Card).
    - **Email Template** - Select the template of the email that will be sent when the Gift Card Account is created.

6. Fill in the remaining product information (name, SKU, categories, related products, etc.) as you would for a Simple Product.
7. Click **Save** in the top right of the page.

# Purchasing gift cards

Gift Card products have several features in addition to a typical Simple or Virtual Product. Most notably is the price, which is configurable. Depending on the price settings you entered in the Prices tab, there will either be a dropdown containing set prices, an open field, or a combination (in this case, the dropdown will contain an **Other Amount** option, which will create an open field when selected). All amounts are in the display currency currently used in that store, but the actual amount of the Gift Card is converted to the base currency once added to the cart.

In addition to this is the **Sender Name** (and **Sender Email** if the Gift Card is Virtual or Combined) and **Recipient Name** (and **Recipient Email** if the Gift Card is Virtual or Combined). If the customer is logged in when viewing this page, the **Sender Name** (and **Sender Email**, if applicable) will be pre-populated. If you have selected to allow messages, there will also be a **Message** text area.

If multiple Gift Cards are purchased in one order, and the Gift Card is Virtual or Combined, then all the corresponding Gift Card codes will be sent to the recipient in one email.

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

If an order containing a Gift Card product is canceled or refunded, you will need to manually cancel the Gift Card account. You can either delete the account entirely, or simply deactivate it.

# Paying with gift cards

Gift Card accounts can be redeemed in the shopping cart, similar to the manner in which a coupon is applied to an order. There is a block that contains a field for entering the Gift Card code, and a button used to apply that account to the items in the cart. Additionally, this block contains a **Check Gift Card status and balance** link. This navigates the customer to a page where they can enter their Gift Card code(s) and view the remaining balance.

Multiple Gift Cards accounts can be applied to a shopping cart. Each time a Gift Card is applied, the amount is displayed in the order totals block, subtracting from the grand total. The full balance of each Gift Card will be subtracted from the shopping cart total. Multiple Gift Cards will be applied in ascending order, meaning the accounts with the smallest remaining balances will be applied first, until the customer runs out of cards, or until the grand total becomes zero. If the grand total becomes zero, the last account that actually applies to the cart will receive a partial deduction, and any cards that have not applied to the cart will not receive a deduction.

The actual deductions occur only once the order is placed.

Orders paid with Gift Cards cannot be refunded. Credit Memos will not be available. To refund such an order, cancel it and manually increase the balance of the Gift Card, or the customer's Store Credit account, appropriately. If an order is partially paid with Gift Cards, the amount paid with Gift Cards cannot be refunded. Again, this amount should manually be added to the Gift Card or customer's account.

# Redeeming gift cards

In addition to using a Gift Card balance during checkout, the balance can be transferred to a customer's Store Credit (if you have enabled this feature). More information about this is available in the *Store Credit in My Account* section in the next chapter.

# 10 Reward Points and Loyalty Programs

[PE] [EE]

The Magento Reward Points System allows an online merchant to implement unique programs designed to enhance user experience and increase customer loyalty. Points are awarded based on a wide range of transaction and customer activities, with the ability for the merchant to control point allotment, balance, and expiration. Customers can redeem points toward purchases, based on a conversion rate between points and currency that is set up by the merchant.

## Configuring reward points

There are some configuration settings that must be completed relating to Reward Points. In order to do so, navigate to **System > Configuration** and select the **Reward Points** tab in the left column.

In the **Reward Points** section, the following options are available:

- **Enable Reward Points Functionality** – Select Yes in order to activate this feature.
- **Enable Reward Points Functionality on Front** – If this functionality is enabled, customers will be able to earn points through their activities, and redeem them during the checkout process. If disabled, only admin users will be able to assign and redeem points on behalf of customers.
- **Customers may see Reward Points History** – If enabled, customers will be able to see a detailed history of each accrual, redemption, and expiration of Reward Points in the My Account interface.
- **Min Reward Points Balance to be able to Redeem** – Requires customers to achieve a minimum point balance before they are able to redeem them on orders. If left blank, there will be no minimum limit.
- **Cap Reward Points Balance to** – Prevents customers from accruing more than this maximum points balance. If left blank, there will be no maximum limit.
- **Reward Points Expire (in days)** – Sets a limit in which customers must redeem Reward Points before they expire. Each batch of points which are earned during separate activities will have a separate expiration, and the expiration limit will display for each batch in the Reward Points history in the frontend (if enabled) and admin. If left blank, there will be no expiration limit.
- **Reward Points Expiry Calculation** – Selecting **Static** defines the date of expiration at the time when the points are earned based on the expiration limit defined above. If the expiration limit is changed, the expiration date for existing points will not change. Selecting **Dynamic** does not define a date of expiration. Instead, points will periodically be checked for expiration. This allows for the editing of the expiration limit to affect existing points.

- **Landing Page** – Defines the CMS page which will be used to display more information to customers about Reward Points. A default template for this CMS page is included, and links to this CMS page appear at various frontend locations where points can be earned.

In the **Acquiring Reward Points by Customers** section, the amount of Reward Points earned for various customer activities is defined. If points are assigned for any of these activities, a message will be displayed on the frontend in the corresponding section informing customers about the amount of points available for completing the action. Points earned for placing orders or qualifying for Shopping Cart Price Rules are not defined in this section, and will be discussed in more detail later in this chapter. The following options are available:

- **Registration** – Defines the amount of points earned when a customer registers.
- **Newsletter Signup** – Defines the amount of points earned when a customer signs up for the newsletter. This is not available for guests who sign up for the newsletter. Additionally, if a customer unsubscribes, and subscribes again, they will not receive points a second time.
- **Converting Invitation to Customer** – Defines the amount of points earned for the inviter when an invitation has been accepted by the invitee, resulting in the creation of a new customer account.
- **Invitation to Customer Conversion Qty Limit** – Limits the number of invitation conversions that can be used to earn points per inviter. If left blank, there will be no maximum limit.
- **Converting Invitation to Order** – Defines the amount of points earned for the inviter when an invitee has accepted the invitation and placed an initial order.
- **Invitation to Order Conversions Qty Limit** – Limits the number of order conversions that can be used to earn points per inviter. If left blank, there will be no maximum limit.
- **Review Submission** – Defines the amount of points earned when a review has been submitted and approved by an admin user.
- **Rewarded Reviews Submission Qty Limit** – Limits the number of reviews that can be used to earn points per customer. If left blank, there will be no maximum limit.
- **New Tag Submission** – Defines the amount of points earned when a tag has been submitted and approved by an admin user.
- **Rewarded Tag Submission Qty Limit** – Limits the number of tags that can be used to earn points per customer. If left blank, there will be no maximum limit.

In the **Email Notification Settings** section, there are two email notifications related to Reward Points which can be managed: balance updates and expiration notifications. The following options are available:

- **Email Sender** – Determines the sender of both the balance update and expiration notification emails.

- **Subscribe Customers by default** – Determines the default subscription status of customers for both balance update and expiration notifications emails.
- **Balance Update Email** – Determines the template of the email that customers receive when there is an update to their points balance.
- **Reward Points Expiry Warning Email** – Determines the template of the email that customers receive when the expiration warning limit has been reached for a batch of points.
- **Expiry Warning before (days)** – Defines the number of days prior to the expiration of point at which the expiration notification will be sent. If left blank, or if the warning limit is greater than the expiration limit (defined in the section above), no expiration notifications will be sent.

# Reward exchange rates

Reward Exchange Rates determine the amount of points that are earned for orders placed based on the order amount, as well as the amount of monetary credit available when points are redeemed in an order. Different exchange rates can be applied to different websites and different customer groups. To manage exchange rates, navigate to **Customers > Reward Exchange Rates**. This page contains a grid listing all existing exchange rates. To create a new exchange rate, click **Add New Rate** in the top right of the page.

If multiple exchange rates apply to the same customer due to an overlap of websites and/or customer groups, exchange rates will use the following priority:

1. Specific website and specific customer group
2. All Websites and specific customer group
3. Specific website and All Customer Groups
4. All Websites and All Customer Groups

The **Direction** determines which type of transaction the exchange rate will define. **Points to Currency** defines the amount of points that can be redeemed for an amount of monetary credit towards an order. Enter the amount of points in the first **Rate** field, and the amount of monetary credit in the second Rate field. When converting points to currency, the amount of points cannot be divided. For example, if 10 points converts to $2.00, points must be redeemed in groups of ten. Therefore, 25 points would redeem for $4.00, with 5 points remaining in the customer's balance.

**Currency to Points** defines the monetary amount of an order that will earn the customer an amount of points. Enter the monetary amount in the first Rate field, and the amount of credit in the second Rate field. When converting currency to points, the amount of points again cannot be divided, and any currency remainder will be rounded down. For example, if $2.00 converts to 10 points, points will be earned in groups of $2.00. Therefore, a $7.00 order would earn 30 points, and the remaining $1.00 would be rounded down. The monetary amount of the order is defined as the amount which the merchant receives, or the grand total minus shipping, tax, discounts, store credit, and gift cards. The points will be earned the moment when there are no non-invoiced items in the order (all items are either paid or canceled). If an admin user does not want to allow customers to earn Reward Points for canceled orders, those points can be manually deducted via the Manage Customers page. This will be discussed in more detail later in the chapter.

For either Direction, the monetary amount will equal the base currency of the website.

# Shopping cart price rules

Points can be rewarded to customers who apply for Shopping Cart Price Rules. They can be rewarded as the only action of the price rule, or in conjunction with a discount. In order to add Reward Points to a price rule, navigate to **Promotions > Shopping Cart Price Rules** and select an existing price rule or click Add New Rule. Select the Actions tab in the left column, and enter the amount of points in the **Add Reward Points** field. When the price rule is activated, a message in the shopping cart will alert customers about the amount of points they can earn by placing the order.

# Customer balances

Reward Points balances can be managed by admin users per customer. To do so, navigate to **Customers > Manage Customers**, select a customer from the grid, and select the **Reward Points** tab in the left column. From this view, the admin user can view and edit (add to or subtract from) the customer's points balance per website, and edit the customer's email notification status. Additionally, this view includes a detailed history of each accrual, redemption, and expiration of points, including timestamp, exchange rate, and reason for balance change.

If enabled on the frontend, customers can also view the details of their points balance. In the My Account interface, there is a **Reward Points** tab. This tab contains information including the balance, current exchange rate, maximum and minimum limits, subscription status (with ability to edit), and (if enabled) balance history. There is also a link to the Rewards Points landing page.

# Redeeming points

Points can be redeemed by admin users and (if enabled) customers during the checkout process. In the Payment Method section, a **Use my Reward Points** checkbox will appear above the enabled payment methods. The available points and monetary exchange rate will be included. If the available balance is greater than the order grand total, no additional payment methods will be required. The amount of Reward Points applied to the order will display among the order totals, subtracting from the grand total, similar to Store Credit and Gift Cards. If Reward Points are used in conjunction with Store Credit and Gift Cards, Reward Points will be deducted first, and Store Credit or Gift Cards will only be deducted if the order total is greater than the redeemable amount of Reward Points.

## Refunding to reward points

Orders placed with Reward Points can be refunded to the Reward Points balance up to the amount redeemed in the order. On the New Credit Memo page, there is a field in which the amount of points that will be applied to the customer's balance can be entered. By default, the value will be pre-populated with the full amount of points used in the order.

# 11 Private Sales [EE]

This chapter concludes the discussion of Private Sales functionality, which consists of the following:

- **Invitations** – Email messages sent out with a link to create an account in the store. If desired, the ability to create an account can be restricted to those who receive an invitation.
- **Category Permissions** - Feature allowing the administrator to disable browsing, price displays, or adding to cart for different categories based on customers groups. Discussed in chapter 1.
- **Website Restrictions** - Feature allowing the administrator to disable access to the website by redirecting to a landing page, login page or registration page. Discussed in chapter 1.
- **Events** - Sale restrictions based on a start and end date. Adding to cart will only be possible between these dates.

## Invitations configuration

There are some configuration settings that must be completed relating to Invitations. To do so, navigate to **System** > **Configuration** and select the **Invitations** tab in the left column.

- **Enable Invitations Functionality** - Determines whether the Invitations module is enabled.
- **Referred Customer Group** - Determines the customer group of the invitee. **Same as Inviter** means invitees will automatically have the same customer group as the customers who invited them**. System Configuration Default** means invitees will automatically have the customer group that is selected as the default. This setting can be changed by clicking on the **Customer Configuration** tab in the left column, selecting the **Create New Account Options** section, and editing the **Default Group** dropdown.
- **New Accounts Registration** - Determines whether the ability to create a new account is **By Invitation Only**, or **Available to All**. If you select the former, the new account registration section will not appear on the login page, and invitees must follow the link in the Invitation email in order to create an account.
- **Allow Customers to Add Custom Message to Invitation Email** - Determines whether there will be a field in the Invitation form in which the inviter can add a custom message which will be sent to the invitee via email. This does not affect the administrator's ability to add a message to an Invitation.

- **Max Invitations Allowed to be Sent at One Time** - Determines the maximum number of invitations that the inviter can send at once. A different invitation is sent out to each email address that the inviter includes in the form. This limit will help prevent inviters from bottlenecking your server by sending out large numbers of Invitations at once, and reduces the ability to use Invitations for spamming.
- **Customer Invitation Email Sender** - Determines the sender of the email that invitees receive when an Invitation email is sent.
- **Customer Invitation Email Template** - Determines the template of the email that invitees receive when an Invitation email is sent.

When you have completed these settings, click **Save Config** in the top right of the page.

# Invitations frontend

If enabled, customers can send and view Invitations from My Account. There will be a **My Invitations** tab in the left column. The page shows a list of all past Invitations sent, including the email address of the recipient, and the current status (**Sent**, **Accepted**, or **Canceled**). It also includes a **Send Invitations** button, which redirects to the Invitation form. This form contains a field for the email address of each recipient (the number of these fields is determined in the configuration above) and (if enabled) a message text area. When the **Send Invitations** button is clicked in the form page, the invitation email will be sent to the recipients. If a recipient email belongs to an existing customer in the system, the invitation email will not get sent to that email, and no record will be created in the admin. Customers can also send invitations using the **Send Invitations** link in the store header.

The invitation email includes a link to the customer account registration form on the Magento frontend. The customer email field will be auto-populated.

# Invitations backend

The admin has the ability to send and view Invitations as well. To do so, navigate to **Customers** > **Manage Invitations**. This page contains a grid listing all Invitations which have been sent. If one Invitation was sent to multiple recipients, a separate record will be created for each recipient. To create a new Invitation, click **Add Invitations** in the top right of the page. Similar to the customer Invitation feature, there will be an email and message field. However, there is an unlimited number of recipient email addresses that can be entered into the email text area, and there will always be a message text area regardless of the configuration setting. In addition to these fields, you can select from which Store View the Customer Invitation email will be sent (and where the link in the email will redirect), and to which customer group the invitee will belong if they create an account (this supersedes the configuration setting). When you have completed the Invitation form, click **Save** in the top right of the page. The Customer Invitation email will be sent and you will be redirected to the Invitation grid.

To view past Invitations, click on a record in the grid. This page will show some basic information about the Invitation, such as the timestamp it was sent, the email address of the recipient, the current status (Sent, Accepted, or Canceled), the customer group of the invitee, and the link which was sent to the invitee. The message, if one was included, will be displayed in a text area, allowing you to edit the message, save it by clicking the **Save Invitation Message** button, and resend the Invitation by clicking the **Resend** button. To cancel the invitation, click the **Cancel** button. This will change the status to Canceled and the link in the email will no longer redirect to the customer account registration form.

If the invitee has created a customer account, the account details will be listed in this page (including a link to the customer account in the admin). If the inviter was a customer (the invitation was not sent by an administrator), the account details will be listed in this page as well (including a link to the customer account in the admin).

Lastly, the status history can be viewed by clicking the **Status History** tab in the left column. This will show the timestamp of each status change (Sent, Accepted, or Canceled).

## Invitations reports

You can view several reports about Invitations. To do so, navigate to **Reports** > **Invitations**.

- **General** - This report summarizes Invitation information for the designated scope and period of time. The scope can be defined in the **Show Report for** drop-down at the top of the page. There will be one line for each **Period**. A Period can be a **Day**, **Month**, or **Year**, and is defined in the **Show by** drop-down at the top of the page. The number of Periods in the report depends on the date range designated at the top of the page. For each Period, you can see the total number of Invitations sent, accepted, and canceled, as well as the percentage of sent Invitations which have been accepted, and the percentage of sent Invitations which have been canceled.
- **Customers** - This report summarizes Invitation information by customer for the designated scope and period of time. The scope can be defined in the **Show Report for** drop-down at the top of the page. There will be one line for each **Period**. A Period can be a **Day**, **Month**, or **Year**, and is defined in the **Show by** drop-down at the top of the page. The number of Periods in the report depends on the date range designated at the top of the page. For each Period, you can see a list of all customers who have sent Invitations, including their ID, name, email, and customer group. Additionally, you can see the number of Invitations they have sent in that period, and the number of those Invitations which have been accepted.
- **Order Conversion Rate** - This report summarizes Invitation and sales information for the designated scope and period of time. The scope can be defined in the **Show Report for** drop-down at the top of the page. There will be one line for each **Period**. A Period can be a **Day**, **Month**, or **Year**, and is defined in the **Show by** drop-down at the top of the page. The number of Periods in the report depends on the date range designated at the top of the page. For each Period, you can see the number of Invitations which have been sent, the number of the those Invitations which have been accepted, the number customers who have completed an order after accepting an Invitation, and the percentage of Invitations sent which have led to a completed order.

# Events configuration

There are some configuration settings that must be completed relating to Events. To do so, navigate to **System** > **Configuration**, click the **Catalog** tab in the left column, and select the **Catalog Events** section.

- **Enable Catalog Events Functionality** - Determines whether the Events module is enabled.
- **Enable Catalog Event Widget** - Determines if the Event Widget is displayed in the frontend. This is a static block containing information about Events in your site. Sometimes this feature is referred to as Lister Block. There is more information about the Event Widget below.
- **Number of Events to be Displayed on Category** - Determines the number of Events that will display in the Event Widget on the category pages.

- **Number of Events to be Displayed on CMS Pages** - Determines the number of Events that will display in the Event Widget on CMS pages, such as the home page.

When you have completed these settings, click **Save Config** in the top right of the page.

# Events backend

Events can be created and viewed by navigating to **Catalog > Categories> Catalog Events**. This page contains a grid listing all Events that you have created. To create a new Event, click **Add Catalog Event** in the top right of the page. You will need to first select the category for which the Event will be created. Click on the desired category from the category tree. Only one event can exist for a given category at one time, so any categories that already have an associated Event will be disabled in the category tree. When you click on a valid category, you will be redirected to the next page. This page contains fields for the start and end date of the event, the image which will be displayed in the Event Widget, the sort order in the Event Widget, and checkboxes for displaying a countdown ticker block on the category page and/or product page (of products associated to the given category). This page also displays the category for which you are creating the Event, which will link back to the previous step if clicked (so you can select a different category). When you have completed the Event settings, click **Save** in the top right of the page. You will be redirected to the Event grid.

To edit an existing Event, select it from the Event grid. This page is similar to creating a new Event. One difference is that the category link will no longer link back to the category tree to allow you to select a different category. Instead, it will link to the **Catalog** > **Manage Categories** page for that category. Another difference is that the **Status** of the Event will display. This status is solely dependent upon the start and end date of the Event. Future Events are **Upcoming**, current Events are **Open**, and past Events are **Closed**.

In **Catalog** > **Manage Categories**, there will be a link to the Events page. This link is a button which will only display for existing categories, so it will not display when creating a new category. If the category already has an associated Event, the button will say **Edit Catalog Event** and will link to the edit page of the given event. If the category does not yet have an associated Event, the button will say **Add Catalog Event** and will link to the second step of the create new event process (with the given category pre-populated).

# Events frontend

If the Event Widget is enabled, it will display on the home page and on category pages. It will display Open Events first, sorted by end date. If two or more Events share the same end date, sorting will be based upon the sort order entered in the steps above. Open Events include a countdown ticker. After all Open Events, the widget will display Upcoming Events, sorted by start date, then sort order. Upcoming Events include the start and end date.

If the Category Page ticker has been enabled for a given Event, the ticker block will display at the top of the product listing page. If the Product Page ticker has been enabled, the ticker block will display at the top of the product view page (of products associated to the given category). Like the Event Widget, the ticker block displays a countdown ticker for Open Events and the start and end date for Upcoming Events. If an Event is Closed, the ticker block will indicate this (and includes the start and end date, similar to Upcoming Events). By default, products in Upcoming or Closed Events are not sellable. The Add to Cart button will not display in the product listing page or the product view page. To restore the Add to Cart button for a Closed Event, the Event must be deleted. However, if a product is associated to another category, which has no selling restrictions, then the Add to Cart button will display in the product view page. Similarly, the ticker block will not display in the product view page if that product is associated to another category which has no selling restrictions.

# Category permissions

Category Permissions can be used in conjunction with Invitations and Events to create private sales. To learn more about Category Permissions, refer back to chapter 6.

# Website restrictions

Website Restrictions can be used in conjunction with Invitations and Events to create Private Sales. To learn more about Website Restrictions, refer back to chapter 7.

# PART IV— CUSTOMER AND ORDER MANAGEMENT FEATURES

## 12 Store Credit [PE] [EE]

This chapter introduces Store Credit functionality, which essentially is a balance associated to a customer account. Store Credit can be used by customers for paying in the store, and can be used by administrators for refunding money to customers. Additionally, Gift Card balances can be transferred to Store Credit, saving customers from having to manually enter the Gift Card code on subsequent purchases.

### Configuration of store credit

There are some configuration settings that must be completed relating to Store Credit. In order to do so, navigate to **System** > **Configuration**, click the **Customer Configuration** tab in the left column, and select the **Store Credit Options** section. The following settings are available:

- **Enable Store Credit Functionality** – Determines if the Store Credit module is enabled. Disabling it will remove the Store Credit tab from the My Account section in the frontend, as well as in the Manage Customers page in the admin.
- **Show Store Credit History to Customers** - Determines if the balance history of a customer's Store Credit is visible to the customer in their My Account page.
- **Store Credit Update Email Sender** - Determines the sender of the email that customers receive when their Store Credit balance is updated.
- **Store Credit Update Email Template** - Determines the template of the email that customers receive when their Store Credit balance is updated.

When you have completed these settings, click **Save Config** in the top right of the page.

### Managing store credit

The admin has the ability to view and edit a customer's Store Credit balance at any time. To do so, navigate to **Customers** > **Manage Customers**, select a customer from the customer grid, and click the **Store Credit** tab in the left column. The first section on this page shows the current balance. If customer accounts are shared on the Global level, this section will be a grid listing the customer's balance in each Website.

The second section allows you to update the balance of the customer. The **Update Balance** field is where the change in balance should be entered. The amount here can be positive or negative, and will add to or subtract from the existing balance, respectively. If customer accounts are shared on the Global level, there will be a dropdown in which you choose the Website for which the balance will be updated. Additionally, there is a checkbox that allows you to send the Store Credit Update email to the customer, notifying them of the balance change. Checking this unlocks the Store View dropdown, which determines from which Store View the email will be sent.

The third section displays the balance history, including a timestamp, a description of the action, and the balance change. Additionally, for some actions there is additional information available, like the order number on which Store Credit was applied. This section is in the form of a grid, allowing you to filter the records.

# Refunding to store credit

While creating a Credit Memo, you have the ability to refund the amount to a customer's Store Credit. On the New Credit Memo page, there is a field in which you can enter the amount of the refund that will be applied to the customer's Store Credit. This enables you to apply either the full or a partial amount of the refund to Store Credit.

# Paying with store credit

In order to pay with Store Credit, a customer must be logged in during checkout. In the Payment Information step of the checkout process, a **Use Store Credit** checkbox will appear above the enabled payment methods. The available balance will be displayed in parentheses. If the available balance is greater than the order grand total, the enabled payment methods will disappear upon checking the box. In the Order Review step of the checkout process, the amount of Store Credit applied to the order will display among the order totals, subtracting from the grand total, similar to Gift Cards.

The customer's Store Credit balance will be deducted only once the order is placed.

Orders paid with Store Credit cannot be refunded. Credit Memos will not be available. To refund such an order, cancel it and manually increase the balance of the customer's account appropriately. If an order is partially paid with Store Credit, the amount paid with Store Credit cannot be refunded. Again, this amount should manually be added to the customer's account.

# Store credit in my account

A customer's My Account section includes a Store Credit tab. This page displays the current balance, as well as (if enabled in the Configuration page) the balance history. In addition to this, customers can apply a Gift Card account balance toward their Store Credit. There is a link in the Store Credit tab which redirects to the Gift Card tab (if the Gift Card is Virtual or Combined, the email sent to the recipient will also contain a link to the Gift Card tab). The customer can enter the Gift Card Code in the field, and click **Redeem Gift Card** to transfer the balance. In order for the balance to be transferrable, the Gift Card Account must be set to Redeemable.

# 13 Assisted Shopping [EE V1.8+]

Magento Enterprise Edition's assisted shopping feature allows merchants and their customer service representatives to better manage a customer's shopping cart from the Admin Panel. Customer Service reps can see the contents of a customer's shopping cart while they are on the phone with that customer and they can easily move items from the wishlist or recently viewed items list to the shopping cart—all without having to create an order. They can also apply a coupon code to a cart from the backend.

### ▶ To use the assisted shopping feature:

In order to use the assisted shopping feature on the backend, the customer must login or create an account so that their cart, wishlist and browsing history will be visible on the backend. To see and manage that customer's cart:

1. Choose **Customers> Manage Customers**.
2. Select a customer to edit from the list and then select the **Shopping Cart** tab on the left.
3. Click the **[Manage Shopping Cart]** to go into the Assisted Shopping mode.
4. You will be able to see the customer's shopping cart, apply a coupon code, as well as be able to see: all products, customer's wishlist, customer's comparison list, recently compared products, recently viewed products, and customer's last ordered products. Any of these products can be easily seen and added to the customer's shopping cart using the **[+Add Selected Products to the Shopping Cart]** button. As soon as they are added to the cart this way, the customer should also be able to see those items in his/her cart on the frontend simply by refreshing the page.
5. The customer can then continue browsing, checkout unassisted, or the customer service representative can create the order by clicking the **[✔Create Order]** button and proceeding to place the order for the customer.

> **!** *The customer service rep can remove items from the cart by setting the quantity to 0 and updating the cart. But the customer service rep cannot move items from the cart to the wishlist or comparison list, the customer must do that themselves.*

# 14 Order Archiving [EE V1.8+]

In order to speed up the performance on the backend when admin users are using the Admin panel to service customers and look up orders, Enterprise v1.8 also introduces the addition of order archiving functionality. Order archiving allows the merchant to set a time period after which orders and their related sales documents (invoices, credit memos, etc) are moved to an archive table. Archived orders are NOT deleted and are still available in the backend via the Admin Panel, but having the older, less frequently accessed orders moved out of the main order tables allows admin users to access the newest orders more quickly.

### To enable order archiving:

1. Choose **System> Configuration**. Select the **Sales** tab on the left.
2. In the **Orders, Invoices, Shipments, Credit Memos Archiving** panel, you can set the following values:
   - **Enable Archiving—Yes** enables archiving using the values below. **No** disables archiving and any values below are ignored.
   - **Archive Orders Purchased**—Age (in days) of orders to be archived. Orders and their related documents older than this number of days will be moved to the archive table.
   - **Order Statuses to be Archived**—Status of orders that can be archived. By default, orders flagged as “complete” and “closed” are set to be archive-able. You can expand this list to include more order statuses or reduce it to fewer.
3. Click the **[✔Save Config]** button to save your settings

# A System Requirements

Magento must be installed on a web server in a LAMP environment: Linux, Apache, MySQL, and PHP. At the base level, Magento will require the following software:

## Operating Environment (LAMP)

Supported Operating Systems (Unix only)

- Linux x86, x86-64

Supported Web Servers:

- Apache 1.3.x
- Apache 2.0.x
- Apache 2.2.x

MySQL:

- 4.1.20 or newer
- InnoDB storage engine

PHP Compatibility:

- PHP v5.2
- Required extensions:
  - PDO_MySQL
  - simplexml
  - mcrypt
  - hash
  - GD
  - DOM
  - iconv
  - curl
  - SOAP (if Webservices API is to be used)
- Configuration requirements:
  - Safe_mode off
  - Memory_limit recommended 512Mb (minimum 256Mb)

## Basic Configuration Requirements

SSL:

- If HTTPS is used to work in the admin, SSL certificate should be valid. Self-signed SSL certificates are not supported

Mail server:

- SMTP server or Sendmail-compatible Mail Transfer Agent (MTA)

Server privileges:

- Ability to run scheduled jobs (crontab) with PHP 5
- Ability to override options in .htaccess files
- We also recommend the use of APC as a bytecode cache for performance improvements. You can find it in the PECL archives here: http://pecl.php.net/package/APC. Other bytecode cache systems are not supported at this time.

Other Requirements (**Enterprise v1.8 and newer only**)

- ionCube loader v3.1.23 or above

## Supported Browsers for Backend Admin:

- Adobe Flash browser plug-in must be installed
- Mozilla Firefox 2.0 and above
- Apple Safari 2.x and above
- MS IE 6 and above
- Google Chrome

# B Installing and Upgrading Enterprise Edition

Installations and upgrades of Enterprise Edition require special attention. In some regards, these processes are similar to those of the Community Edition. In some cases, however, the processes must be done manually in order to avoid conflicts or downgrading.

## New Installation & Runtime Requirement

With Magento Enterprise Edition v1.8, Magento now requires ionCube to also be installed in your hosting environment. Enterprise Edition is still fully open source, ionCube encoding will protect only the license management portions of the installation. It does not restrict your ability to see, extend or modify all of the core code; nor does it restrict your ability to fully customize your look and feel using themes.

In addition to protecting the license key and licensing management module, ionCube encoding will also make it possible for Magento to provide merchants and developers with trial installations of the Enterprise Edition for evaluation or development purposes while still protecting the software. Which files will be encoded depends on the license type. Partner and Customer licenses will only have abstract classes of the Enterprise files encoded. Trial licenses will have all Enterprise Edition code encoded with documentation on how to develop and test extensions with the Enterprise Edition.

To take advantage of the Version 1.8 functionality you will need to install the ionCube loader (v3.1.23 or higher) on your server if your server does not have ionCube support already enabled. Please see http://www.ioncube.com/loaders.php for more information.

## Installing Enterprise Edition

### New Installation

Installing the Enterprise Edition can be achieved by following the same steps required to install the Community Edition. The Enterprise Edition comes as a tar.gz package, similar to the full package for the Community Edition. However, the Enterprise Edition cannot be installed using the downloader. Sample data is also installed in the same manner as with the Community Edition.

### Installing over the Community Edition

If installing over an existing Community Edition installation, follow these steps:

1. Upgrade the Community Edition installation to the latest available version, and change your custom templates to match it.
2. Create a copy of the database and save it as a new database.
3. Install the Enterprise Edition in a separate directory using the database copy.
4. Upgrade your custom templates to match the Enterprise Edition functionality.
5. Test the Enterprise Edition installation, and change the configuration of your web server to use the new directory.

# Upgrading Enterprise

When a new version of the Enterprise Edition is released, an existing version can be upgraded by manually replacing the previous files with the files contained in the new tar.gz package.

**Warning:**

***Magento Connect cannot be used for upgrades or extensions****. The Enterprise Edition contains modules and code patches not available in the Community Edition. Currently, Magento Connect can only be used to upgrade the Community Edition, and using it to upgrade the Enterprise Edition can cause downgrading of your installation. Additionally, because community and other modules/extensions on Magento Connect can reference the core package, installing any module from Magento Connect can lead to the same downgrading problem. Until this issue is resolved for Enterprise customers, upgrades must be performed manually as described above.*

*Community modules cannot be directly accessed using Magento Connect because they are downloaded as an extension key rather than as a tar.gz package. The Magento support team, however, does have access to the extensions directly, and can provide these to you following your request. This service is included in the Magento support that comes with your license fees. Assistance on Community Edition extensions usage and any impact these may cause to the core application are not included through our support services..*