



Community
EDITION

Magento Community Edition User Guide



Magento®

Version 1.8

Table of Contents

1 About This Guide	1
2 Support and Contact Information	1
3 Conventions Used in this Guide	2
4 Introducing Magento Community Edition	4
5 Basic Configuration	12
6 Introducing the Frontend	31
7 Introducing the Backend	60
8 Setting Up Your Catalog	74
9 Setting Up Your Store Hierarchy	151
10 Taxes	153
11 Shipping	179
12 Payment	188
13 Design and Content	209
14 Promotions	236
15 Managing Orders and Customers	284
16 Managing Customer-Generated Content	300
17 Monitoring and Improving the Store.....	312
18 Keeping Your Store Healthy	320
19 Indexing	323
20 Getting Help	344

21 Appendix: VAT ID Validation	347
22 Index	364

1 About This Guide

Welcome to the Magento Community Edition User Guide, which provides an overview of the Magento Community Edition (CE) eCommerce platform developed by Magento, Inc.

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

This guide first introduces Magento CE and its key concepts, and then describes how to install Magento CE. The following two chapters introduce the daily experience that a customer can have in a Magento web store and the daily management tasks that a storeowner would perform.

The rest of the chapters walk you through the process of setting up your Magento CE web store; customizing its behavior to your requirements; entering products; managing orders, invoices and shipments; and achieving the best turnover and profits from your web store.

2 Support and Contact Information

We at Magento are dedicated to providing our customers with the best possible service.

We would love to hear from you.

For feedback on this book and all other inquiries, please use our contact form at:

<http://www.magentocommerce.com/company/contact-us/>

3 Conventions Used in this Guide

The following style conventions are used in this document:

Note: This is a note.

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

4 Introducing Magento Community Edition

This chapter introduces Magento Community Edition (CE), its basic components, and the workflow for using it.

What is Magento CE?

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

Magento CE License

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

Magento CE Frontend and Backend

The following sections provide an overview of the two visible interfaces of Magento

CE: the frontend and the backend.

Frontend (The Web Store Front)

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

An example is shown in Figure 1.



Figure 1. Magento CE Frontend

Introducing Magento Community Edition

Backend (The Back Office)

The backend is the password-protected view of the back office features that enable a web store administrator to setup the products and purchasing options and to

Introducing Magento Community Edition

manage orders and all other store functionalities. You can navigate the Admin Panel using the menu on the top of the page (Magento top menu). A view of the backend is shown in Figure 2.

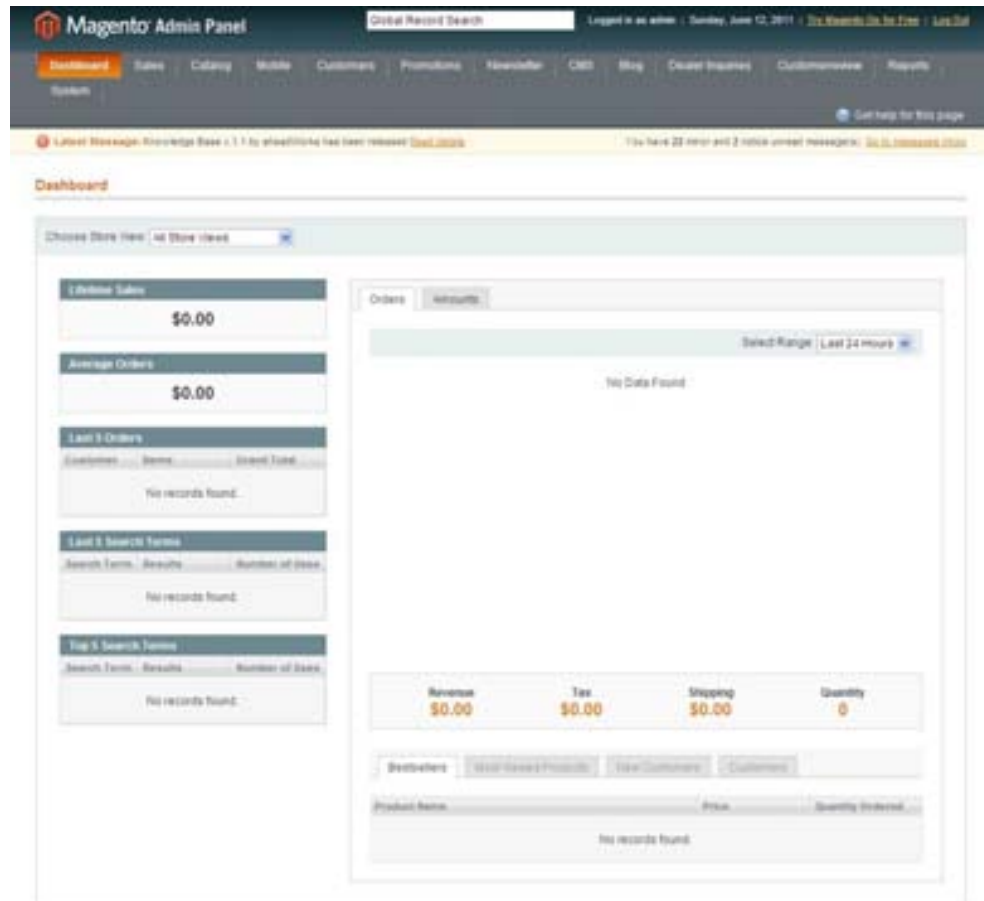


Figure 2. Magento CE Backend

Magento CE Concepts

To use Magento CE effectively, you should be familiar with the following terms and concepts.

Attribute: A characteristic of a product. For example, an attribute of a digital camera could be “resolution,” and the value of this attribute for a particular digital camera

could be “10 megapixels.” Customers can filter a list of products by values of one or more attributes.

Attribute Group: A logical grouping of attributes within an attribute set.

Attribute Set: A collection of attributes, customized to fit a certain type of product.

For example, if you sell several different kinds of T-shirts on your website, you can create the T-shirts attribute set which will include the simple attributes commonly shared by all of your T-shirts. This may include color, size, gender, and brand.

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

Category: A user-defined product classification. A category can have any number of levels of subcategories.

Configurable product: This product enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKU) and then add these six to a configurable product where customers can choose the size and color, and then add it to their cart.

Credit memo: A credit memo is a statement of credits; for example, a credit for returned merchandise generates a credit memo. According to your store policy, you can apply the credit to future orders or refund the customer’s payment method.

Cross-sell: Cross-sell products appear next to the shopping cart. When a customer navigates to the shopping cart page, these products are displayed as cross-sells to the items already in the shopping cart. They are similar to impulse buys, like magazines and candy at the cash registers in grocery stores.

Downloadable product: A product, such as a media file, that the customer downloads from the store after purchase. These downloadable files can reside on your server or be provided as URLs to any other server.

Grouped product: This option enables you to display several similar products on a single page. For example, if you are selling chefs' knives and you have the same knife in four sizes, you can make a grouped product to display all four of these sizes. Customers can select the size(s) that they want and add them to the cart from this page.

Invoice: An invoice in Magento CE represents a confirmation of payment. More than one invoice can be associated with a single order. If the products in an order are shipped in multiple shipments, then an invoice is generated for each shipment for the products in that shipment.

Order: An order is a request for goods.

Order status: The order status indicates where it is in the order cycle. In Magento CE, the system order status values are the following:

- ❖ **Pending** - Pending orders are brand new orders that have not been processed. Typically, these orders need to be invoiced and shipped.

- ❖ **On Hold** - The user cannot proceed to order processing if the order is in this state. This is convenient if, for example, some data must be verified.
- ❖ **Pending PayPal** (possible for PayPal orders only) - Pending PayPal orders are brand new orders that have not been cleared by PayPal. When using PayPal as a payment method, customers are redirected to the PayPal website. If they have not paid for the order, orders will be marked as Pending PayPal. It is not recommended to process these orders without referencing PayPal first to see if payment has been made.

- ❖ Payment Review - As long as an external payment gateway is verifying the payment information from a sales order, the order is assigned the Payment Review status both in the payment system and in Magento CE.
- ❖ Processing - Processing means that the order has been either invoiced or shipped, but not both.
- ❖ Suspected Fraud (possible for PayPal orders only) - The order transaction did not pass one or more of the PayPal fraud filters and the system receives the response from PayPal that the transaction is under review by Fraud Service
- ❖ Complete - Orders marked as complete have fully been invoiced and have shipped.
- ❖ Canceled - The order can be of this status if the customer calls your web store and asks to cancel an order if the order has not been paid for.

The store administrator can create custom order statuses, assign them to order states and set default status values for order states.

Product type: Magento CE classifies products as one of several predefined product types: Simple Product, Virtual Product, Downloadable Product, Grouped Product, Configurable Product, Bundle Product.

Related product: Related products are offered to the customer for purchase in addition to the item that the customer is viewing.

Scope: Scope describes the extent of your store hierarchy to which a given setting is effective. A setting can have a scope of Global (all websites, stores, and store views), Website (the selected website and all stores and store views under it), Store (the selected store and all store views under it), and Store View (the selected store view).

Some settings that are set at a higher level can be overridden at a lower level.

Search Engine Optimization (SEO): The set of techniques and strategies that ensure that your site is listed prominently in search engine results, thereby increasing the likelihood that customers will find your site.

Simple product: This is the most basic product type. It is suitable for all kinds of physical (shipped) products.

Shipment: A shipment is a record of the products in an order that have been shipped.

More than one shipment can be associated with a single order.

Shopping cart: The set of products that a customer has selected to purchase, but has not yet purchased.

Store: The second level of your store hierarchy. A website can have multiple stores (each, potentially, with its own root category), and a store can have multiple store views.

Store View: The lowest level of your store hierarchy. Typically, a store view is created for each locale or language. All store views under a given store share the same catalog. Customers use a drop-down list on the frontend to switch from one store view to another.

Tax rule: A combination of a product tax class, customer tax class, and tax rate. This rule defines which tax calculation is applied.

Up-sell: An up-sell item is one that is offered to the customer as an alternative to the product the customer is viewing. These products may be more expensive, of higher quality, or more popular, or produce a higher profit margin.

Virtual Product: This is a product that does not require shipping or inventory. It is generally used for warranties or services.

Website: The highest level of your store hierarchy. You can have multiple websites, and each website can have a different domain name. Websites can be set up to share customer data, or to not share data. Typically, each website has different lines of products and may have different customer bases.

5 Basic Configuration

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

Accessing the Backend

All of the basic configuration tasks are performed in the Magento CE backend. The following describes how to access and log in to the Magento CE backend.

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

To access the Magento backend administration environment:

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

Note: The Magento CE Demo Store backend can be accessed at: <http://demo-admin.magentocommerce.com/admin>

The Log in to Admin Panel page is displayed, as shown in Figure 12.



Figure 12. Backend Login Page

- 2 Log in using the user name and password that you created during the installation process.
- 3 Click the Login button to display the administration panel, as shown in. Figure 13.

Basic Configuration

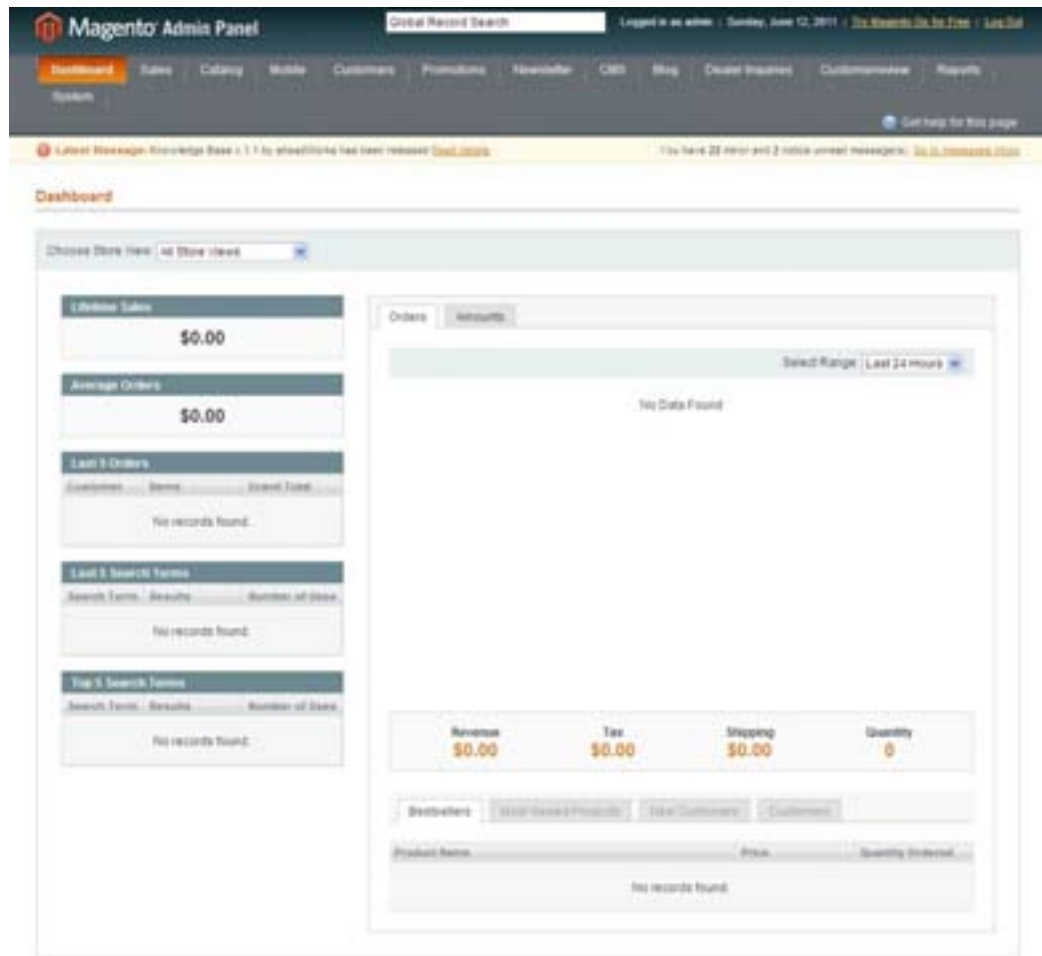


Figure 13. Magento CE Backend

4. After you log in, the Magento messages that you have not yet read are displayed, such as the one shown in Figure 14.



Figure 14. Incoming Message Notice



Among the first things you will want to do is plan your store hierarchy, that is, the arrangement of websites, stores, and store views. When Magento CE is installed, a “Main Website,” a default store, and a default store view are created. You will want to create additional websites, stores, and store views, depending on the breadth of the items you are selling and the composition of your target markets.

Websites

Stores

For your handmade baskets website, you might want to set up two stores, one specializing in wicker and one for other materials. You can set up two root categories (one for wicker items and one for other items) and assign one to each store. (See “Managing Categories,” page 77, for more information about setting up root categories). Several stores of one website can have different independent domain names as well, but it should be configured on the store view level of each store.

Store Views

Your market research indicates that about half of your potential customer base speaks English, and the other half speaks Spanish. Within each store, you can create separate store views, one for English and one for Spanish. The store views share the same catalog, but each is presented in its respective language. Customers use a drop-down list on the frontend to switch from one store view to another.

Store Pages General Configuration

This section describes how to configure general aspects of your frontend pages. These configurations are performed in the Configuration area of the Admin Panel.

To access the Configuration section, select System > Configuration. The tabs in the left column provide access to configuration options for different aspects of your Magento CE instance. The Current Configuration Scope drop-down list in the upper left corner of the page enables you to select the hierarchy level (website, store, store view) to which the configuration will be applied. To apply configuration settings at the global level (that is, for all your websites, stores, and store views), leave Default Config selected.

To open the options for configuring your store pages design click the Design tab in the left column. The Design page opens with a number of field sets.

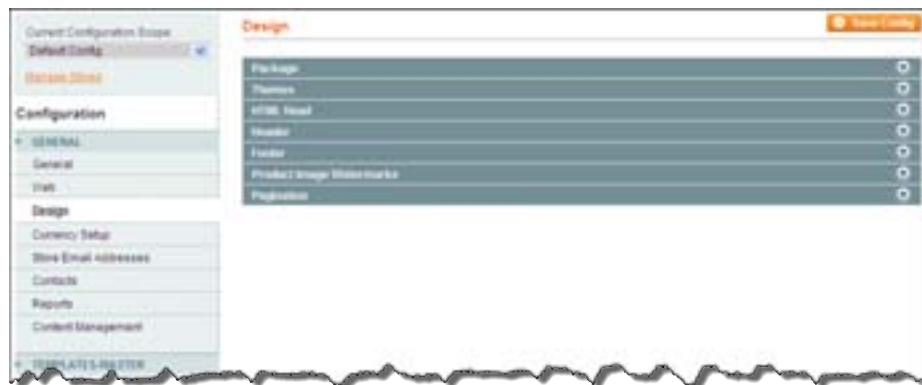


Figure 16. Design Configuration Page

HTML Head Field Set

The settings in the HTML Head field set on the Design tab are used to define general information about your store's pages. These settings may not be visible to your customers, but they are important for things such as traffic analytics and search engine optimization.

To define general page features:

1. Click the HTML Head heading to expand the field set as shown in Figure 17.

Basic Configuration

Design Save Config

Package		[STORE VIEW]
Themes		[STORE VIEW]
HTML Head		[STORE VIEW]
Favicon Icon	<input type="text"/> Browse...	[STORE VIEW]
	+ Allowed file types: ICO, PNG, GIF, JPEG, APNG, SVG, for all browsers support all these formats	
Default Title	<input type="text" value="Magento Commerce"/>	[STORE VIEW]
Title Prefix	<input type="text"/>	[STORE VIEW]
Title Suffix	<input type="text"/>	[STORE VIEW]
Default Description	<input type="text" value="Default Description"/>	[STORE VIEW]
Default Keywords	<input type="text" value="Magento, Varien, E-commerce"/>	[STORE VIEW]
Default Robots	<input type="text" value="INDEX, FOLLOW"/>	[STORE VIEW]
Miscellaneous Scripts	<input type="text"/>	[STORE VIEW]
	+ This will be included before head closing tag in page HTML.	
Display Demo Store Notice	<input type="text" value="Yes"/>	[STORE VIEW]

Header	[STORE VIEW]
Footer	[STORE VIEW]
Product Image Watermarks	[STORE VIEW]
Paginations	[STORE VIEW]

Figure 17. HTML Head Field Set

Note: The words in square brackets (for example, [STORE VIEW]) indicate the scope of the associated option.

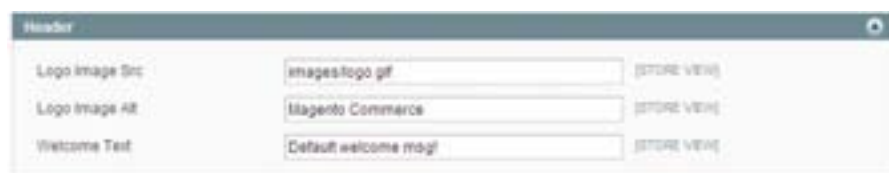
- 2 Click the Browse button and select an icon file (on your local computer) to use as a “favicon.”
This small icon appears in the address bar of your customers’ browsers.
- 3 In the Default Title field, specify the page title to be displayed in browsers for those pages that do not have their own title. This information is also used to improve search engine visibility and performance.
- 4 In the Title Prefix and Title Suffix fields, specify a prefix and a suffix to be appended to the pages of your web store that have their own title, such as a prefix of My Web Store.
- 5 In the Default Description and Default Keywords fields specify words that describe your web store to be used by search engines when page-specific information is not provided. Keywords must be separated by commas.
- 6 Optional. Select Display Demo Store Notice to display a notice at the top of every page that indicates that this is a demo store and that no transactions will be processed. This option is useful while you are setting up your store prior to opening for business.
- 7 Click the Save Config button on the top right of the page.

Header Field Set

The options on the Header field set define the look of the top of each page in your store.

To define the header of each web store page:

1. Click the Header tab to expand the section as shown in Figure 18.



Header		
Logo Image Src	images/logo.gif	[STORE VIEW]
Logo Image Alt	Magento Commerce	[STORE VIEW]
Welcome Text	Default welcome msg!	[STORE VIEW]

Figure 18. Header Field Set

Basic Configuration

- 2 In the Logo Image Src field, specify the logo graphic file to appear on the top left of each page of your web store, as shown in Figure 19 for the Magento Demo Store. Make sure that you name your logo something other than logo.gif, so it does not get overwritten in future upgrades.



Figure 19. Page Header Section

Note: You will need to upload the image file using an FTP client to the `skin/frontend/default/default/images/` directory or to your own skin folder in your Magento CE installation.

- 3 In the Logo Image Alt field, specify the alternative text to be displayed when your customers hover their mouse cursors over the logo image in your web store.
- 4 In the Welcome Text field, specify the welcome message to be displayed on the top right of your web store for customers that are not logged in, as shown in Figure 19.
- 5 Click Save Config to save your changes.

Footer Field Set

The options in the Footer field set define what is displayed at the bottom of each web page in your store.

To define the footer of your web store pages:

1. Select the Footer option to expand the page to display the footer options, as shown in Figure 20.



Figure 20. Footer Field Set

- 2 In the Copyright field, specify your web store's copyright information.
- 3 In the Miscellaneous HTML field, specify the custom HTML code to be added to the end of the page code that is generated by Magento CE. This area is usually used for adding tracking scripts that track your customers' activity on the site.
- 4 Click Save Config to save your changes.

Store Contacts Configuration

This section describes how to configure store email addresses that are used for internal and external email communications and the Contact Us feature.

Web Store Emails

The Store Email Address page of the system configuration enables you to specify email addresses and contact names to be used when sending email to customers

Basic Configuration

upon registration and at all steps of the order lifecycle. These email address are also used for sending error reports to the store administrator.

To define web store email addresses:

1. In the Admin panel, select System > Configuration > GENERAL > Store Email Address. Here you can configure the various email addresses used for sending emails from your web store to your customers.

The screenshot shows the 'Store Email Addresses' configuration page. It features a title bar with the text 'Store Email Addresses' and a 'Save Config' button. Below the title bar, there are four sections, each with a header and a 'STORE VIEW' link:

- General Contact:** Sender Name: Owner, Sender Email: owner@example.com
- Sales Representative:** Sender Name: Sales, Sender Email: sales@example.com
- Customer Support:** Sender Name: CustomerSupport, Sender Email: support@example.com
- Custom Email 1:** (Empty fields)
- Custom Email 2:** (Empty fields)

Figure 21. Store Email Addresses Page

2. In the Current Configuration Scope drop-down list in the left upper left corner, select the scope for which you want these configurations to apply. All fields on this page can have different values for each store view.
3. In each Sender Name field, specify the name of the sender or department from which the emails are sent.
4. In the Sender Email field specify the email address used for sending the emails.
5. Click Save Config to save your changes.

Note: See “Customizing Transactional Emails,” page 177, for more information about emails.

Contacts

These options define the email to which customers send requests when using the Contact Us option at the bottom of the pages of your web store.

To define your web store contact information:

1. In the Admin Panel, select System > Configuration > GENERAL > Contacts to display the Contacts page, as shown in Figure 22.

Figure 22. Contacts Page

2. In the Current Configuration Scope drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. In the Enable Contact Us drop-down list, select Yes to enable customers to contact you by email with the Contact Us link, or select No to disable this communication method.
4. In the Send Emails To field, specify the email that is used for receiving feedback when a customer uses the Contact Us option in the store.
5. In the Email Sender drop-down list, select the email address from which feedback messages are sent.

Basic Configuration

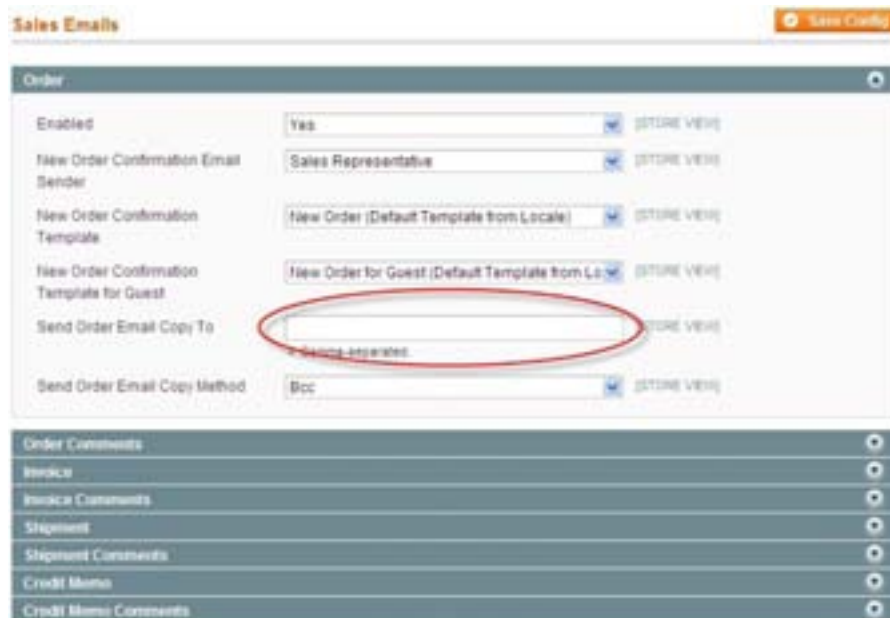
- 6 In the Email Template drop-down list, select the template to be used for the Contact Us form displayed on the frontend. You can create custom email templates. For more information, see “Customizing Transactional Emails,” page 177.
- 7 Click Save Config to save your changes.

Sales Emails

You can configure Magento CE to send emails that confirm an order, invoice, shipment, or credit memo to both registered customers and store guests.

To configure sales emails sent to customers:

- 1 In the Admin Panel, select System > Configuration > SALES > Sales Emails.
- 2 In the Current Configuration Scope drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
- 3 Click the Order heading to expand the Order field set, as shown in Figure 23.



The screenshot shows the 'Sales Emails' configuration page. The 'Order' field set is expanded, revealing several configuration options. The 'Send Order Email Copy To' field is highlighted with a red circle. Below the 'Order' field set, there are expandable sections for 'Order Comments', 'Invoice', 'Invoice Comments', 'Shipment', 'Shipment Comments', 'Credit Memo', and 'Credit Memo Comments'.

Order	
Enabled	Yes [STORE VIEW]
New Order Confirmation Email Sender	Sales Representative [STORE VIEW]
New Order Confirmation Template	New Order (Default Template from Locale) [STORE VIEW]
New Order Confirmation Template for Guest	New Order for Guest (Default Template from Locale) [STORE VIEW]
Send Order Email Copy To	[STORE VIEW]
Send Order Email Copy Method	Bcc [STORE VIEW]

Order Comments	
Invoice	[STORE VIEW]
Invoice Comments	[STORE VIEW]
Shipment	[STORE VIEW]
Shipment Comments	[STORE VIEW]
Credit Memo	[STORE VIEW]
Credit Memo Comments	[STORE VIEW]

Figure 23. Sales Emails Page

4. In the Order field set, configure the following options:
 - ❖ In the Enabled drop-down list, select Yes to enable new order confirmation emails to be sent.
 - ❖ In the New Order Confirmation Email Sender drop-down list, select the email address to be used for sending the new order confirmation.
 - ❖ In the New Order Confirmation Template drop-down list, select the template to be used for the for the order confirmation emails sent to registered customers.
 - ❖ In the New Order Confirmation Template for Guest drop down- list, select the template to be used for the for the order confirmation emails sent to guest customers.
 - ❖ In the Send Order Email Copy To field, specify the email address to which a copy of the new order confirmation email is sent. This feature helps you to keep track of the new orders that come in.
2. Configure the options on the other field sets on this page.
3. Click Save Config to save your changes.

Shipping Settings

This section describes how to specify shipping options, such as the origin used for shipping rate calculations and whether to enable the multiple shipping destinations feature.

Configuring shipping settings and shipping methods enables you to provide customers a selection of shipping methods with shipping rates during checkout. Magento CE includes extensive integration with major shipping carriers; for USPS, DHL, FedEx, and UPS you can create shipment orders and print shipping labels right from the Magento CE Admin Panel. See “Shipping,” page 147, for details about shipping system integration.

Basic Configuration

To define general shipping options:

1. In the Admin Panel, select System > Configuration > SALES > Shipping Settings.
2. In the Current Configuration Scope drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. Click the Origin and Options tabs to expand the page to display the shipping options, as shown in Figure 24.

Shipping Settings Save Config

Origin

Country: United States [view source]
Region/State: California [view source]
ZIP/Postal Code: 90034 [view source]
City: [view source]
Street Address: [view source]
Street Address Line 2: [view source]

Options

Allow Shipping to Multiple Addresses: Yes [view source]
Maximum Qty Allowed for Shipping to Multiple Addresses: 100 [view source]

Figure 24. Shipping Settings Page

4. Configure the options to match your store.
5. Click Save Config to save your changes.

See “General Shipping Settings,” page 147, for details about configuring shipping methods.

Cookie Restriction Mode

Magento can notify store customers about cookies that are being used by a. The feature is called Cookie Restriction Mode. It is aimed at helping store owners to comply with the European Union Privacy and Electronic Communications Directive and its amendment. According to these documents, websites cannot use cookies until a user consents.

Enabling and Configuring Cookie Restriction Mode

To enable the cookie restriction mode:

1. Log in to the Magento Admin Panel.
2. Navigate to System › Configuration › GENERAL › Web.
3. In the Current Configuration Scope in the upper-left corner of the page select the desired website.
4. Expand the Session Cookie Management field set.
5. In the Cookie Restriction Mode field select Yes.
6. To save the changes click the Save Config button.

Cookie Restriction Mode: Implementation Details

After the cookie restriction mode is enabled, a message is displayed on the top of each page in the store front. The message informs customers that the website requires cookies to provide all of its features and requests users to confirm that they are informed and consent. See Figure 25.

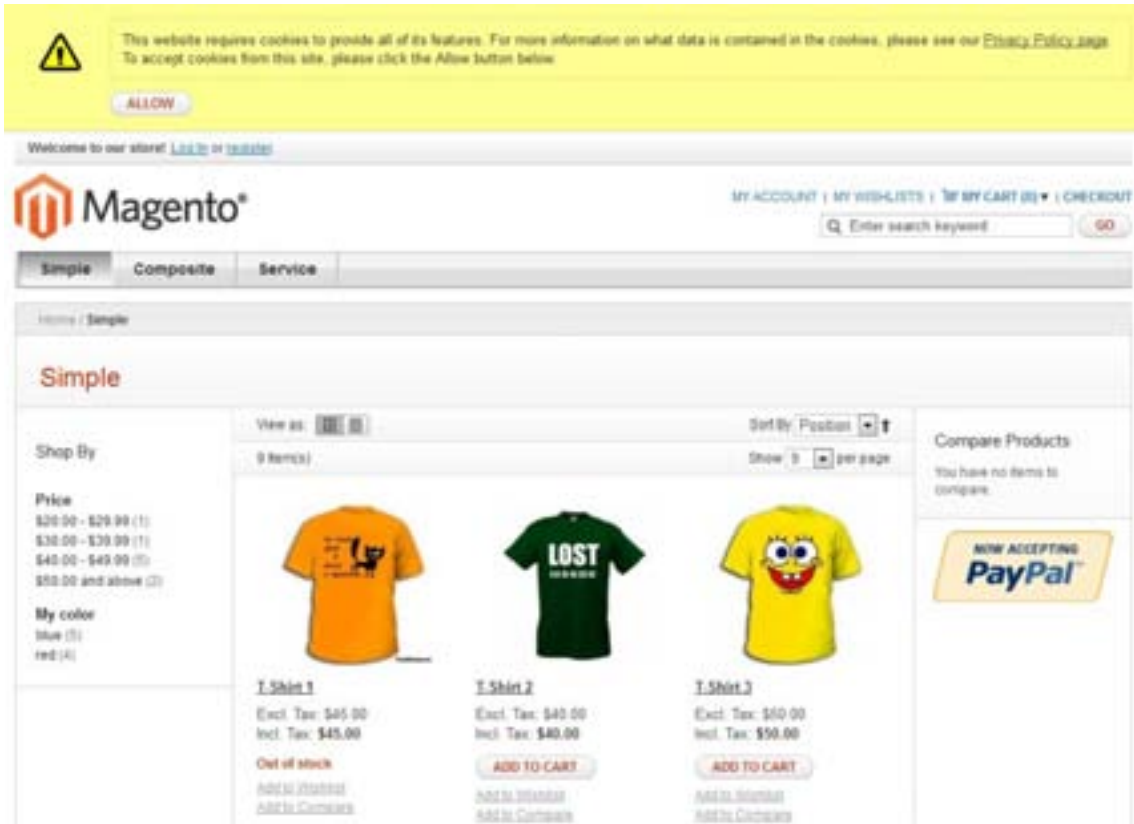


Figure 25. A warning message is displayed in the frontend when the cookie restriction mode is enabled

The message contains a link to the Privacy Policy page, which provides a list of cookies being collected and explains on how they are used. The default content of this page can be changed under CMS > Pages > Manage Content > Privacy Policy.

After a customer clicks Allow, the message disappears.

If a customer does not click Allow, the message persists, but the store functionality is available as usual. However, Google Analytics cookies are not stored in this case, even if the Google Analytics functionality is enabled.

Cookies Used in Magento

The following table lists cookies, which are always stored by Magento on the customer's side.

Cookie Name	Cookie Description
USER_ALLOWED_SAVE_COOKIE	Indicates whether a customer is allowed to use cookies
external_no_cache	A flag which indicates whether caching is disabled
persistent_shopping_cart	Session key
Stf	If links to a product were sent to friends, this cookie stores the timestamps in the '\$timeStamp1, \$timestamp2, ..., \$timestampN' format.
pollN	A poll ID to indicate that the poll has been already voted.
frontend	Session ID
guest-view	Allows guests to edit their orders.

The following table contains a list of cookies, which Magento additionally stores on customers side if the Full Page Cache functionality is enabled.

Cookie Name	Cookie Description
CUSTOMER	Hashed value of a customer ID in the 'customer_\$customerId' format
CUSTOMER_INFO	Hashed value of a customer group ID in the 'customer_group_\$customerGroupid' format
NEWMESSAGE	Indicates whether a new message has been received
CART	Hashed value of a quote ID in the '\$quoteId' format
COMPARE	List of product IDs added by customer to compare list in the '\$productId 1, \$productId 2, ..., productId N' format
POLL	ID of a recently voted poll
RECENTLYCOMPARED	A customer's list of recently compared product IDs in the '\$productId 1, \$productId 2, ..., productId N' format

Basic Configuration

WISHLIST	Hashed list of products added to wishlist in the '\$productId 1_\$productId 2..._productId N' format
WISHLIST_CNT	Hashed number of items in the customer's wishlist in the 'wishlist_item_count_\$productCount' format
CUSTOMER_AUTH	Indicates whether a customer is logged in. A hashed value of 'customer_logged_in_0 1'
CATEGORY_INFO	Stores the category info on the page. This allows displaying pages more quickly.
LAST_CATEGORY	Recently visited category ID in the '\$categoryId' format
VIEWED_PRODUCT_IDS	Recently viewed product IDs in '\$productId 1, \$productId 2, ..., productId N' format
currency	Code of the currency selected by a customer ('USD', 'UAH', 'GBP', etc.)
store	Store view code
NO_CACHE	Indicates whether it is allowed to use cache
LAST_PRODUCT	Last viewed product ID

If the Google Analytics module is enabled and using cookies is allowed by a customer, Magento stores the following Google Analytics cookies:

- `_utma`
- `_utmb_`
- `_utmc`
- `_utmz.`

For a description of the Google Analytics cookies refer the official Google documentation.

6 Introducing the Frontend

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

Magento CE. This knowledge will help you make better decisions when setting up your store.

Overview

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

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

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

Introducing the Frontend

The illustration in Figure 26 shows the first page of a default Magento CE store with sample data.



Figure 26. Magento CE Store Frontend

Finding the Right Products

The Magento CE frontend is also referred to in this guide as your web store. It provides a variety of options for browsing through the products offered and then drilling down to view detailed information about each product. Magento CE enables you to define the default appearance of how multiple products are

presented, such as whether they are shown as a list or grid (table), their sort order, and the filter that is used.

Categories

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

Introducing the Frontend

Categories can have multiple levels of subcategories. A customer can navigate to a subcategory using a category's dropdown menu. Figure 27 shows the five categories on the Magento CE demo store and the subcategories under Electronics: Cell Phones, Cameras and Computers:

Furniture	Electronics	Apparel	Music	Ebooks
	Cell Phones			
	Cameras	Accessories		
	Computers	Digital Cameras		

Figure 27. Categories and Subcategories

A category or a subcategory can each have a product list or show a landing page that features some products. Figure 28 shows a category that has products:



Figure 28. Category Page with Products

Filtering the Display of Products

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

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

For example: The Apparel category has three green products, as shown in Figure 29.



Figure 29. Category Product Counts

After a customer clicks on the Green attribute, all the green products are displayed in the web store for browsing and the SHOP BY area indicates that the products in this category have been filtered by the Color: Green attribute, as shown in Figure 30.

Introducing the Frontend

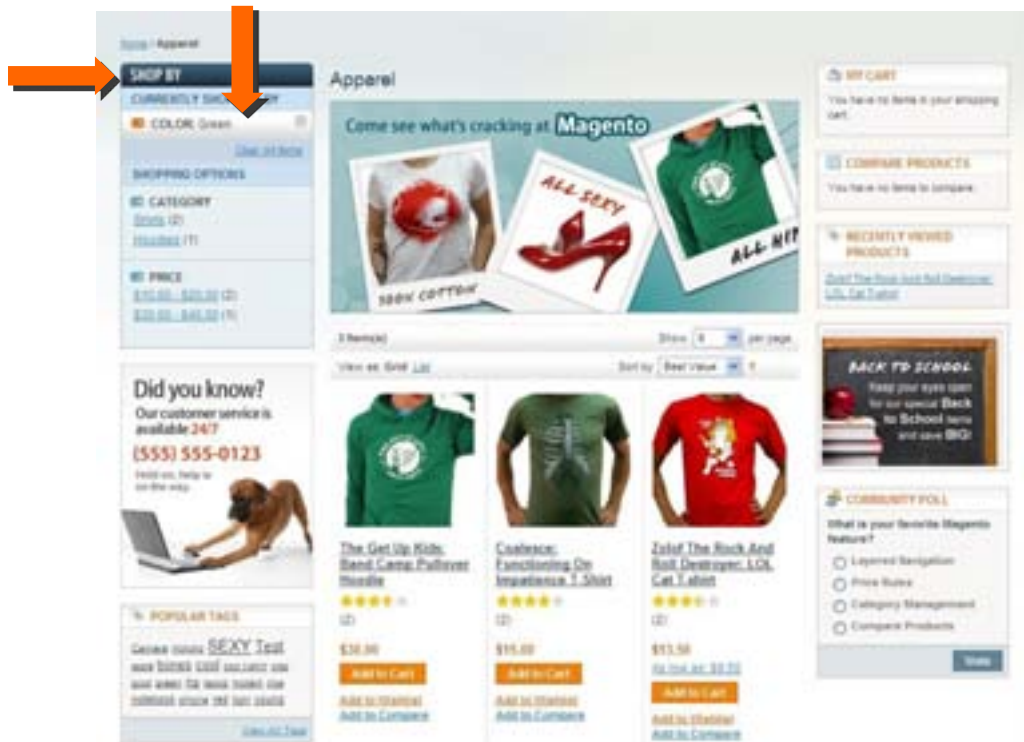


Figure 30. Filter Indication

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

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

Popular Tags

Another option that Magento CE provides to help customers find the right product is called Popular Tags. Popular Tags provide another property that can be assigned to products that customers can select in order to view the products to which this tag has been assigned (see Figure 31).



Figure 31. Popular Tags

Popular tags can be assigned by customers in the product page (see Figure 32) and can be approved and edited from the backend, if required.



Figure 32. Adding a Tag to a Product

Searching

The top right of your web store page provides a search field in which a customer can type all or part of the name of a product, or its attributes, in order to find it, as shown in Figure 33.

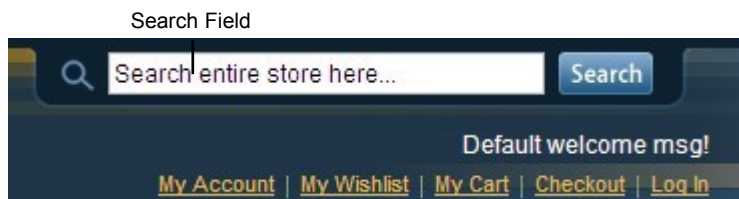


Figure 33. Search Tool

Comparing Products

Introducing the Frontend

Magento CE enables customers to compare two or more selected products, as follows:

1. A customer first clicks the Add to Compare link provided for each product that he/she wants to compare, as shown in Figure 34.



Figure 34. Add to Compare Link

2. After selecting all the products to be compared, the customer then clicks the Compare Items button in the COMPARE PRODUCTS area, as shown in Figure 35.



Figure 35. Compare Products Area

The Compare Products page is then displayed in a pop-up window, as shown in Figure 36.

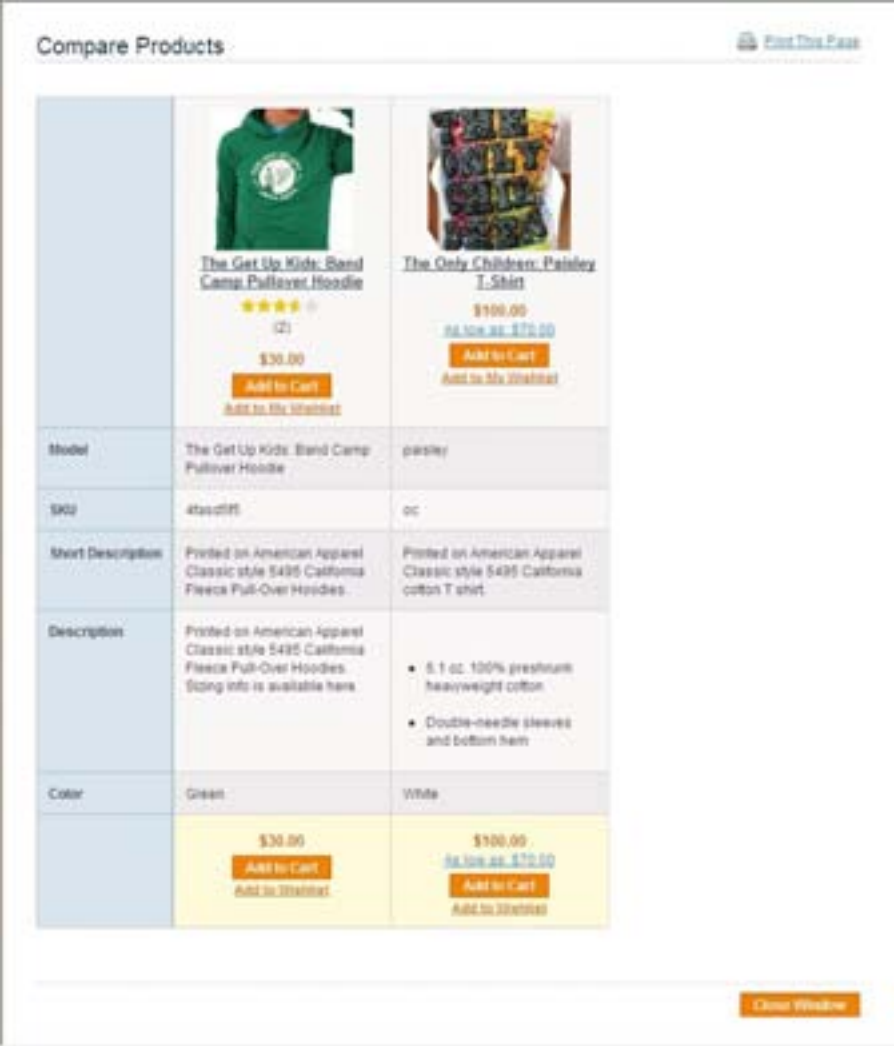


Figure 36. Compare Products Page

Note: A row also appears for each comparable attribute defined for these products, such as Color. See “Managing Product Attributes,” page 88, for more information about defining attributes.

Sorting Products


A customer can sort the products that are displayed by selecting the relevant option in the Sort by drop-down list, as shown in Figure 37.






Figure 37.Sort BDropdown list

Grid/List View

By selecting the Grid or List links at the top of the page, a customer can choose to view products displayed in a grid (table), as shown in Figure 37, or as a list, as shown in Figure 38.

View as: [Grid](#) **List** 

Sort by  



Anashria Womens Premier Leather Sandal

★★★★☆


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

[Add Your Review](#)

\$41.95 [Add to Cart](#)

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

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



ASICS® Men's GEL-Kayano® XII

\$134.99 [Add to Cart](#)

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

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

Figure 38 List View

Recently Viewed

The RECENTLY VIEWED PRODUCTS area (see Figure 39) lists the products that were recently viewed by the customer, whether they were purchased or not, and enables the customer to easily link back to them.



RECENTLY VIEWED PRODUCTS

- [CN Clogs Beach/Garden Clog](#)
- [Anashria Womens Premier Leather Sandal](#)
- [Zolof The Rock And Roll Destroyer: LOL Cat T-shirt](#)

Figure 39. Recently Viewed Products Area

Promotional Information

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

Product List Banners

You can define the banner that appears at the top of each category landing page with a static block (see Figure 40). This feature adds a graphical element to your category pages that can be used for special promotions, or to highlight certain products. Banners can be defined per category. More information about how to create and add static blocks on your site can be found in “Managing CMS Pages,” page 174.



Figure 40. Product List Banner

Promotional Pages

Another way to feature products and promotions in your web store is a customized category landing page, which is a static HTML page that may be displayed while the user browses a category, instead of showing a list of products. See Figure 41.

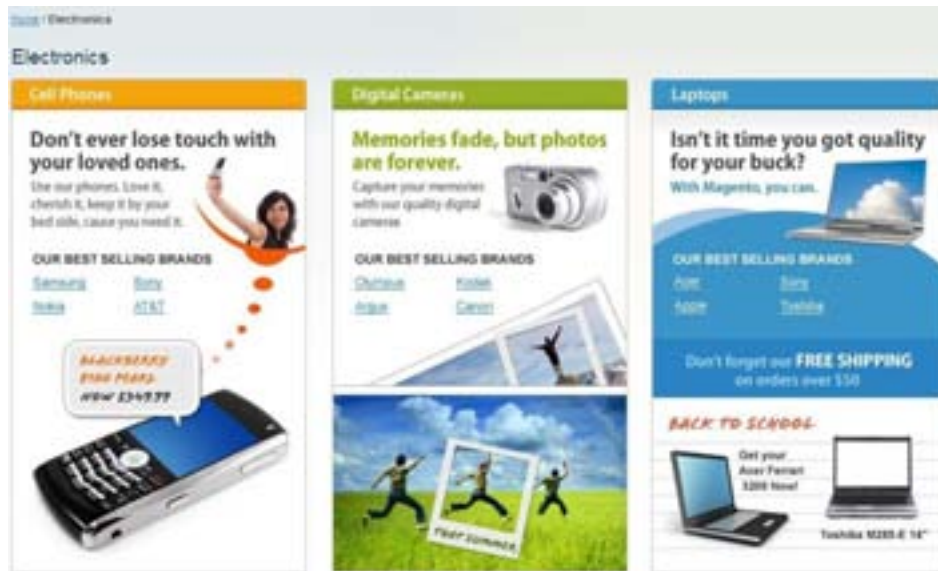


Figure 41. Promotional Page

Up-sell Products

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

The example in Figure 42 presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.

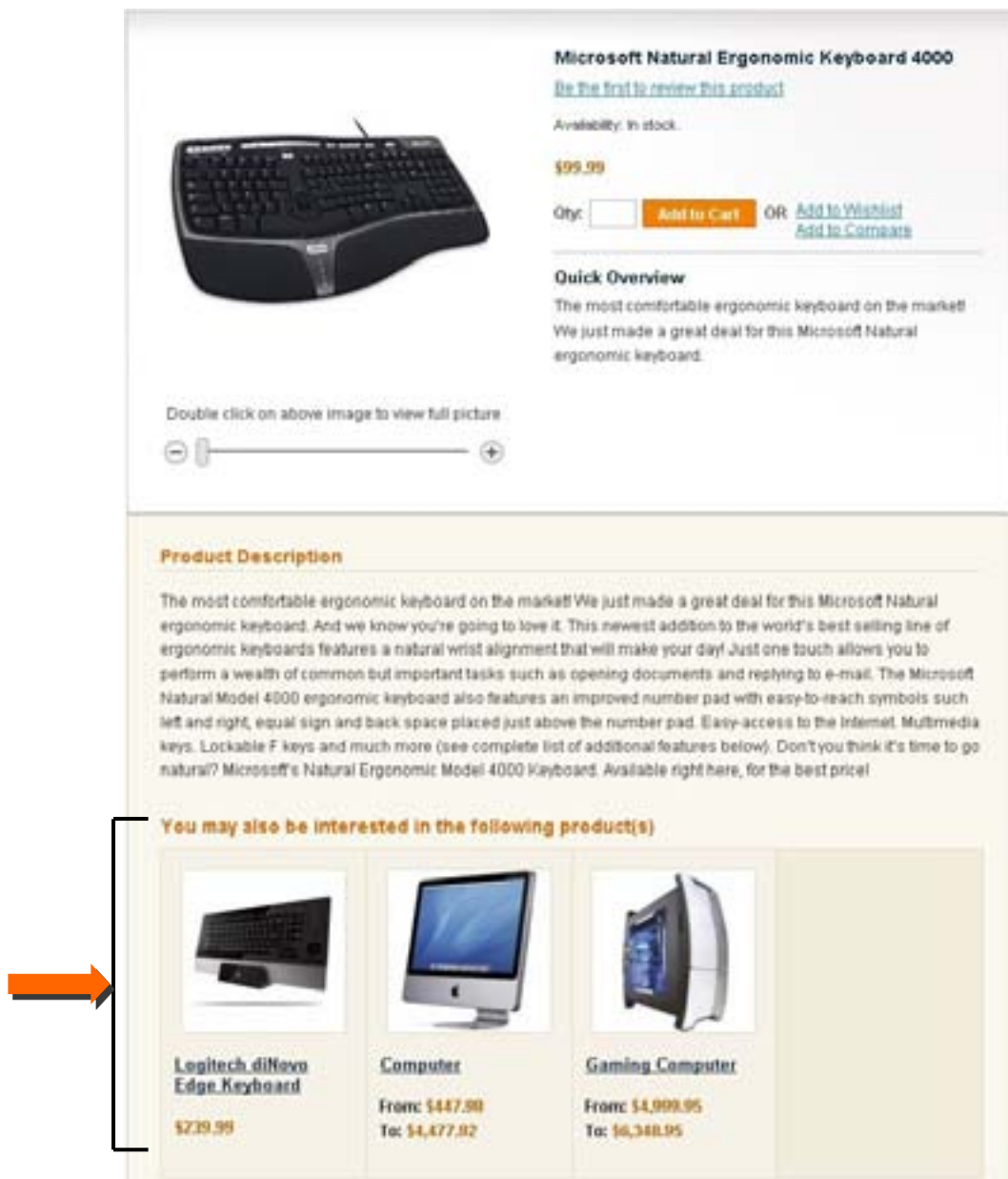


Figure 42. Up-Sell Products

Related Products

Related products are meant to be purchased in addition to the item the customer is viewing. Related products are shown in the right column of your web store in a separate block. The example in Figure 43 shows various mobile phones promoted as related products.



Figure 43. Related Products

Cross-sell Products

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

See Figure 44.



Figure 44. Cross-Sell Item

Product Pages

The backend enables you to define the type of information and functionality that is provided in a product's page. Figure 45 shows a typical product page.

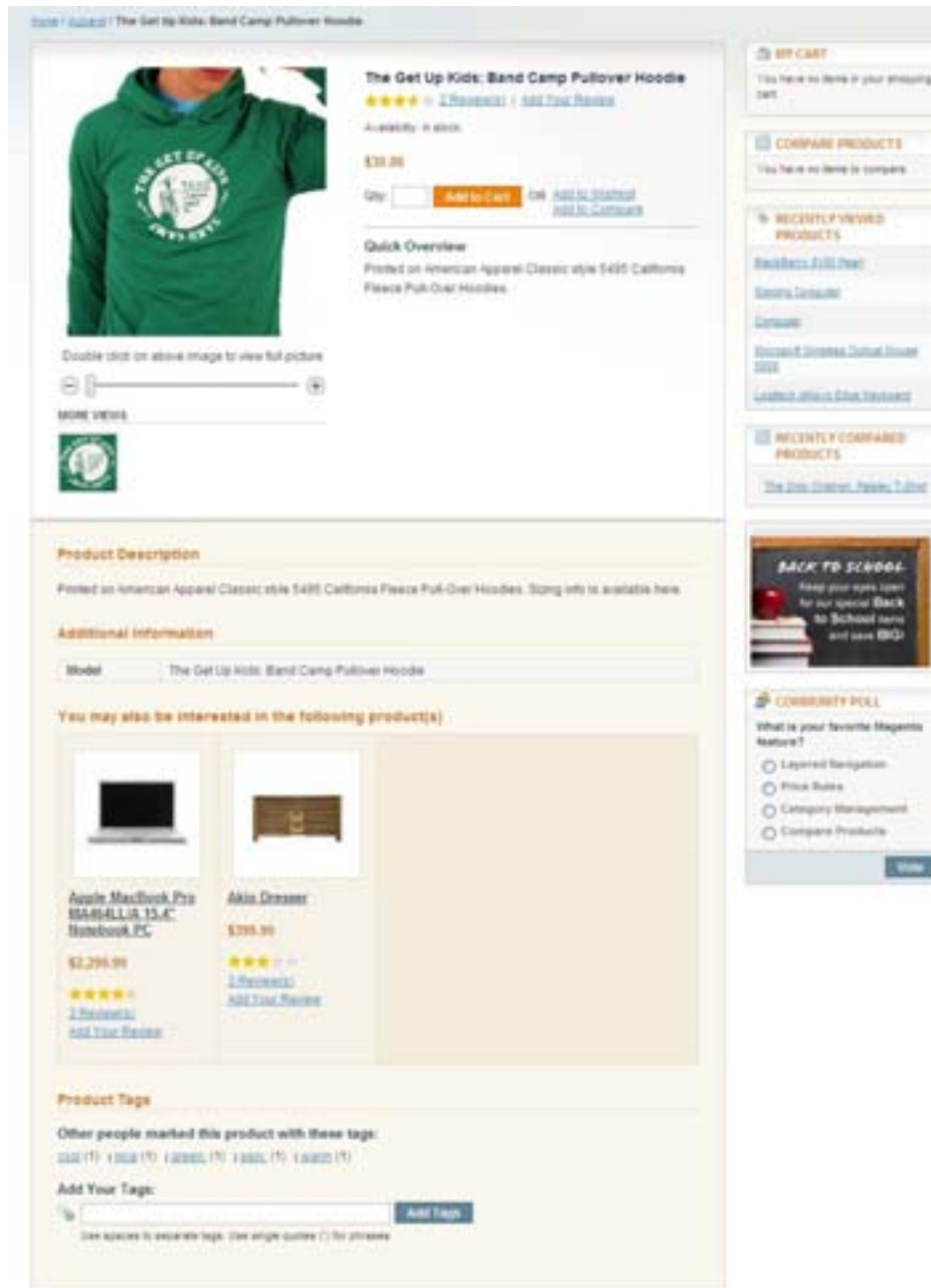
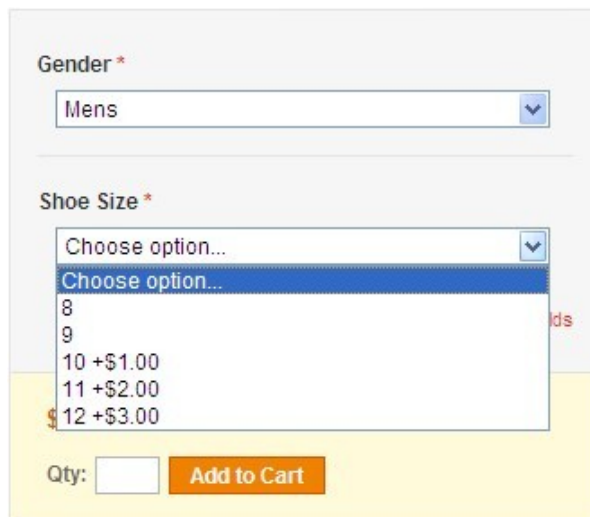


Figure 45. Product Page

Introducing the Frontend

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

- ❖ Image: The customer can use the slider to zoom in and out of the image, click on it to enlarge it, or pan it to see different parts of it.
- ❖ Description: The top of the page shows a short description in the Quick Overview area, and farther down you can see a more detailed Product Description area. Also, Additional Information details are provided about the product in the form of a table.
- ❖ Product Tags: Shows the tags assigned to this product. Customers can navigate to other products by clicking on one of these tags. You can also define whether customers can add tags.
- ❖ Reviews: Your customers can rate and review your products. The store administrator can approve or remove reviews.
- ❖ Product Options: Magento provides a variety of controls that enable you to configure the product options that appear for a customer to select, such as check boxes, drop-down lists, and so on. For example, customers are able to select the size of a shoe, as shown in Figure 46.



The screenshot displays a product configuration interface. At the top, there is a 'Gender *' dropdown menu with 'Mens' selected. Below it, a 'Shoe Size *' dropdown menu is open, showing a list of options: 'Choose option...', '8', '9', '10 +\$1.00', '11 +\$2.00', and '12 +\$3.00'. The '10 +\$1.00' option is currently selected. At the bottom of the form, there is a 'Qty:' input field and an 'Add to Cart' button.

Figure 46. Product Options

Web Store Page Header and Footer

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

The Header

The default header of each of your web store pages shows your web store logo and banner. An example is shown in Figure 47.



Figure 47. Web Store Header

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

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

The Footer

The bottom of each of your web store pages includes a footer (see Figure 48).



Figure 48. Web Store Footer

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

Purchasing Functionality

Wishlist

The Wishlist feature enables customers to pick out products which they are interested in, but not ready to order yet. Products can be moved from the wishlist to the shopping cart with one click. Customers can also share the Wishlist their friends right from the Wishlist section of the My Account page.

The Wishlist feature is available for registered customers only.

My Cart

To add a product to your shopping cart, click on the Add to Cart button for that product, as shown in Figure 49.



Figure 49. Add to Cart Button

The My Cart area shown in Figure 49 displays a brief list of the products in your shopping cart. The Recently Added items(s) area shows a list of the last three items added to your shopping cart.

Clearing My Cart

A customer who wants to remove all items from the shopping cart can do so by clicking the Clear Shipping Cart button on the Shopping Cart page (see Figure 50).



Figure 50. Clearing the Shopping Cart

Checking Out

The My Cart area also provides a Checkout button (see Figure 51) that takes a customer to the first step of the one-page checkout process (see Figure 52).

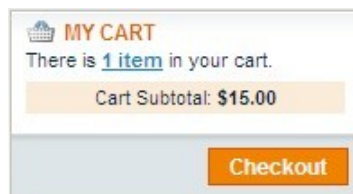


Figure 51. My Cart Area

A screenshot of a multi-step checkout process. The first step is '1 Checkout method'. It is divided into two sections: 'CHECKOUT AS A GUEST OR REGISTER' and 'LOGIN'. The 'CHECKOUT AS A GUEST OR REGISTER' section has two radio buttons: 'Checkout as Guest' and 'Register'. Below these, it says 'Register and save time!' and 'Register with us for future convenience' followed by two bullet points: 'Fast and easy check-out' and 'Easy access to your order history and status'. The 'LOGIN' section has the text 'Already registered? Please log in below' and two input fields for 'Email Address' and 'Password'. There are 'Continue', 'Forgot our password?', and 'Login' buttons. On the right, a sidebar titled 'YOUR CHECKOUT PROGRESS' shows a list of steps: 'Billing Address', 'Shipping Address', 'Shipping Method', and 'Payment Method'. At the bottom, a progress bar shows the current step '1 Billing Information' and subsequent steps '2 Shipping Information', '3 Shipping Method', '4 Payment Information', and '5 Order Review'.

Figure 52. Checking Out

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

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

Tip: Magento CE also provides multi-shipping functionality that enables customers to ship items to more than one address at the same time. This is a very useful feature for sending gifts, for example. This feature can be configured under System > Configuration > SALES > Shipping Settings > Options.

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

Figure 53 shows an example of checking out as a guest by selecting the Checkout as Guest option in the step above

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

1 Checkout method

1 Billing Information

First Name* Last Name*

Company Email Address*

Address*

City* State/Province* Please select region, state or province

Zip/Postal Code* Country* United States

Telephone* Fax

☐ Ship to this address ☒ Ship to different address

Required Fields

Continue

1 Shipping Information 4 Shipping Method 1 Payment Information 1 Order Review

YOUR CHECKOUT PROGRESS

Billing Address Shipping Address Shipping Method Payment Method

Figure 53. Checkout as Guest

Click Continue to specify the Shipping Address, select the Shipping Method, and select the Payment Method.

The last step of the checkout process enables the customer to review the entire order, as shown in Figure 54.

1 Checkout method

1 Billing Information

1 Shipping Information

4 Shipping Method

1 Payment Information

1 Order Review

Product Name	Price	Qty	Subtotal
Customer Functioning On Impairance T-Shirt	\$15.00	1	\$15.00
Size			
Small			
			Subtotal \$15.00
			Shipping & Handling (Flat Rate - Fixed) \$5.00
			Tax \$1.34
			Grand Total \$21.34

Forgot an item? [Add Item Cart](#)

Place Order

YOUR CHECKOUT PROGRESS

Billing Address | Change

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

Shipping Address | Change

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

Shipping Method | Change

Flat Rate - Fixed \$5.00

Payment Method | Change

Check / Money order

Figure 54. Order Review

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

Customers then confirm the order and receive an order number, or they can change their minds and edit their carts using the Edit Your Cart link. If they proceed with the order and the payment is processed successfully, then a “Thank You” page is displayed, as shown in Figure 55.

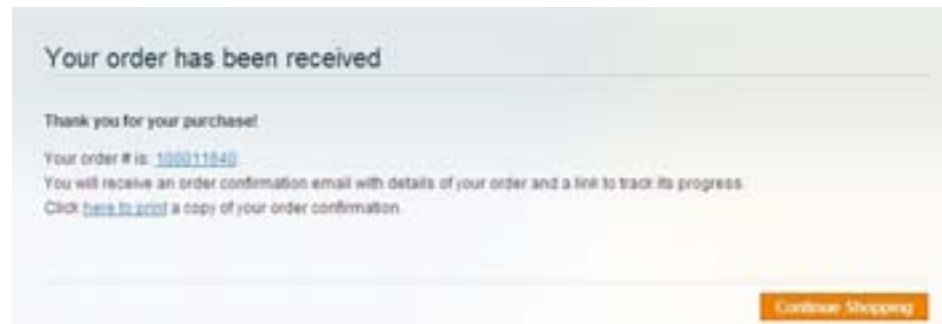


Figure 55. “Thank You” Page

A confirmation email can be sent to the customer. An example is shown in Figure 56. The confirmation email can be configured by under System > Configuration > Sales Emails.



Figure 56. Confirmation Email

Managing Customer Relations

Customer Emails

Magento CE can send a variety of automatically generated customer emails (such as when a customer places an order or opens an account) and enables you to customize them as you require. For more information about customizing the emails sent from the store to customers see “Customizing Transactional Emails,” page 177.

Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to give their opinions, feedback, and comments about products.

They appear in the frontend, as shown in Figure 57.



Figure 57. Ratings and Reviews

The number of stars indicates the satisfaction rating. You can click on the Review(s) link to display the actual textual reviews provided by customers. For more details, see “Managing Ratings and Reviews”, page 235.

Community Polls

Each web store can provide a Community Poll, as shown in Figure 58. For more details, see “Managing Polls,” page 240.



A screenshot of a web form titled "COMMUNITY POLL" with a group of people icon. The question is "What is your favorite Magento feature?". There are four radio button options: "Layered Navigation", "Price Rules", "Category Management", and "Compare Products". A "Vote" button is at the bottom right.

COMMUNITY POLL

What is your favorite Magento feature?

☐ Layered Navigation

☐ Price Rules

☐ Category Management

☐ Compare Products

Vote

Figure 58. Community Poll

7 Introducing the Backend

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

See “Accessing the Backend,” page 23, for details on logging in to your store’s backend.

See “Setting Up Your Catalog,” page 69, for a full description of how to set up your catalog.

Each of the subsequent chapters features a description of the other aspects of customizing your backend.

Understanding Scope

Magento CE enables you to organize your operations into multiple websites, stores, and store views. (See “Store Hierarchy,” page 25, for descriptions of these terms.) Many of the configuration pages in the backend enable you to select the website, store, or store view that you want your configuration changes to apply to. Selecting the website, store, or store view is known as selecting the scope of your changes.

To select the scope for configuration changes, use the Current Configuration Scope drop-down list in the upper left corner of the configuration page, as shown in Figure 59.

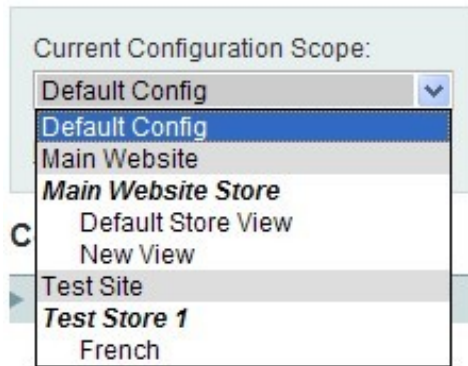


Figure 59. Selecting Configuration Scope

If you select Default Config, the option choices you make are applied as default values for all websites, stores, and store views.

On the configuration pages, you will see scope indicators to the right of each option. These indicate the lowest level of the hierarchy at which you can set the value of these options. For example, the value of the Default Display Currency option may be set at the default (global) level, but can be overridden at the store view level, as indicated by the “(STORE VIEW)” indicator for that option (see Figure 60).



Figure 60. Scope Indicators

Managing Administrator Messages

When you log in to the backend, any new messages are displayed in a pop-up box.

Typically, these messages are notifications of new Magento CE or extension releases.

You can manage these messages much like you would manage your email.

To display all the messages in your inbox:

Click the Go to messages inbox on the top right of the page. The Messages Inbox page is displayed, which provides standard message handling features (see Figure 61).

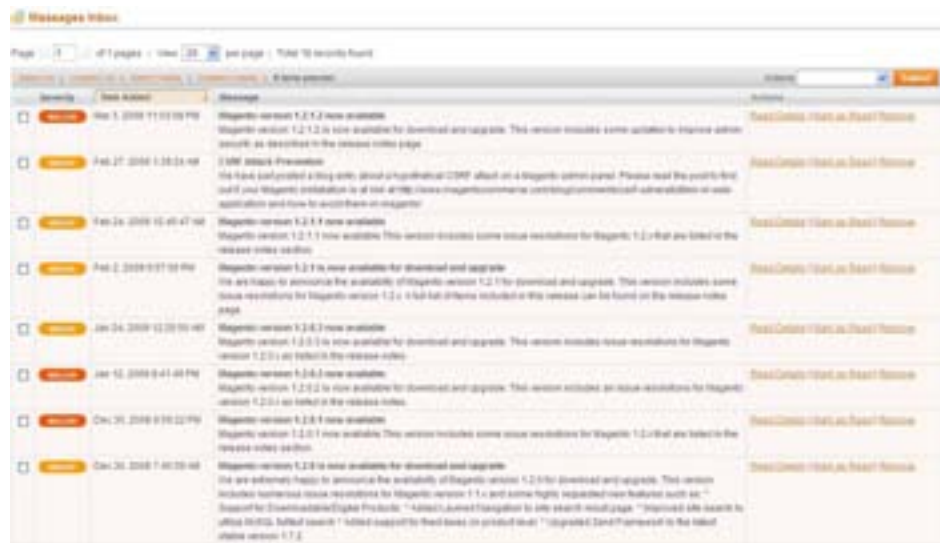


Figure 61. Messages Inbox Page

You can mark selected messages as Read so that they do not appear again when you log in. You can also Remove marked messages so that they are permanently deleted.

Supervising Web Store Activities

The Dashboard (Figure 62) is the first page to be displayed by default after you log in. It can also be accessed by clicking Dashboard on the Admin Panel top menu.



Figure 62. Dashboard

This page shows you basic information and statistics for managing your web store.

The following describes the options in this page:

Chart

Orders tab: The Orders tab in the center of the page shows a graph that indicates the quantity of orders being processed in your web store for each point on the time scale within the specified range. The range is selected in the Select Range drop-down list at the top of the chart. Underneath you can see the revenue, tax and shipping amounts of your orders and the total quantity of the orders. Only orders for which at least one invoice, shipment, or credit memo has been created or which

have been created from external gateways (for example, PayPal Express) are included in the reports.

Amounts tab: The Amounts tab in the center of the page shows a graph indicating the revenue for each point on the time scale within the specified range. The range is selected in the Select Range drop-down list at the top of the chart.

Revenue, Tax, Shipping, and Quantity: These statistics are calculated as follows:

- ❖ $\text{Revenue} = \text{Total Invoiced Amount} - \text{Tax Invoiced Amount} - \text{Shipping Invoiced Amount} - (\text{Total Refunded Amount} - \text{Tax Refunded Amount} - \text{Shipping Refunded Amount})$
- ❖ $\text{Tax} = \text{Tax Invoiced Amount} - \text{Tax Refunded Amount}$
- ❖ $\text{Shipping} = \text{Shipping Invoiced Amount} - \text{Shipping Refunded Amount}$

Note: Charts can be enabled or disabled under [System > Configuration > ADVANCED > Admin > Dashboard](#).

Left Information Panel

The panel on the left shows you the total amount of orders handled in your Magento CE web store, the average amount of each order, information about your last five orders, and the last five and top five search terms.

Bottom Information Tabs

The bottom of the Dashboard (Figure 63) provides additional information about your web store, as follows:

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

Figure 63. Additional Dashboard Information

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

Managing Orders

This section first describes how to view and manage orders, as well as how to create orders from the backend.

Viewing the Orders in Your Web Store

To view the orders in your web store:

In the Admin Panel, select Sales > Orders to display the Orders page, as shown in Figure 64.



Figure 64. Orders Page

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

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

- ❖ **Quantity of Orders Displayed:** The top part of the page enables you to control how many orders are displayed in the page, as shown in Figure 65.



Figure 65. Order Display Controls

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



Figure 66. Order Selection Controls

Note: You can also select individual orders by selecting the check box on the left of each order.

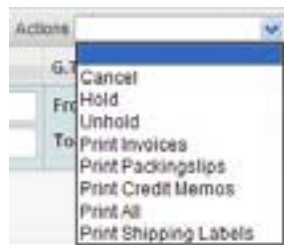
- ❖ **Filtering Orders:** The area under the order selection controls enables you to filter the orders that are displayed by specifying values in one or more of the fields and then clicking Search. To display all orders, click Reset Filter.



Figure 67. Filtering Controls

Note: The list displays only those orders that meet all the criteria that you specified.

- ❖ **Sorting orders:** Click on the header of a column to sort the orders by the value of that column. Each click toggles between an ascending sort and a descending sort.
- ❖ **Order actions:** The Actions drop-down list provides a list of actions that may be performed on the selected orders. The actions that can be performed include the following:



- **Cancel:** Sets the order status to Canceled and disables any further processing.
- **Hold:** Puts the order on hold. The order is not affected in any way, but no further action may be performed unless you release it from Hold status.
- **Unhold:** Releases the order from Hold status.
- **Printing options:** These options enable you to print various documents related to the order.
 - ❖ **Viewing an order:** To view and/or edit an existing order, click row for the desired order or click the View option in the order's row in the Action column. The Order View page opens, showing details about the order.

Viewing an Order's Details

Magento CE provides a large variety of information for each order. This section provides a quick review of some of the information provided for an existing order. The navigation bar at the top of the Order View page enables you to access the various sections:

Information, Invoices, Credit Memos, Shipments, Comments History, and Transactions.

Information Page

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

The screenshot displays the 'Order View' page in the Magento backend. On the left is a navigation sidebar with links: Information, Invoices, Credit Memos, Shipments, Comments History, and Transactions. The main content area shows a confirmation message 'The order has been created.' followed by 'Order # 100000002 | Jun 16, 2011 4:48:03 PM'. Below this are several sections: 'Order Information' (Order Date: Jun 16, 2011 4:48:03 PM, Order Status: Pending, Purchased From: New Website, New Website Store, Default Store View), 'Account Information' (Customer Name: Vincent Van Gogh, Email: vincent@vincent.com, Customer Group: General), 'Billing Address' (Vincent Van Gogh, 101 N Main St, Sherman Oaks, California 91403, United States, T 310-455-4555), 'Shipping Address' (identical to billing), 'Payment Information' (Credit (Bank) order, Order was placed using CCE), 'Shipping & Handling Information' (Flat Rate, Total \$1.00), 'Items Ordered' table, 'Customer History' (Add Order Comments, Status: Pending, Comments field, checkboxes for 'Credit Customer by Email' and 'Print as PDF'), and 'Order Totals' (Subtotal: \$100.00, Shipping & Handling: \$1.00, Grand Total: \$101.00, Total Paid: \$0.00, Total Refunded: \$0.00, Total Due: \$101.00).

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Product 2	Ordered	\$100.00	\$100.00	Ordered 1	\$100.00	\$0.00	0%	\$0.00	\$100.00
Mini 200									

Order Totals	
Subtotal	\$100.00
Shipping & Handling	\$1.00
Grand Total	\$101.00
Total Paid	\$0.00
Total Refunded	\$0.00
Total Due	\$101.00

Figure 68. Order Information Page

Note: The SKU (Stock Keeping Unit) specifies the product code that is used to keep track of the actual inventory. SKUs are defined during product creation. For details about managing your product catalog, see “Setting Up Your Catalog,” page 69.

The Comments History area of this page provides information about the lifecycle of the order. Every time that an invoice, shipment, or credit memo document is created, a record with each document’s identification is added on this tab. Also, here you can find out whether the customer was notified about the creation of each order document. For each partial refund, the system provides the order amount to be returned to the customer. You can change order status in the Status drop-down list.

To add a comment to the order:

1. Specify the comment text in the Comment text box.
2. If you want to send the comment to the customer by email, select the Notify Customer by Email check box.
3. If you want to make the comment visible in the order view on the frontend, select the Visible on Frontend check-box to specify that the customer is sent a copy of the comments that you add in the Comment box.
4. Click Submit Comment.

All comments are stored on the Comments History page. To open it, click the Comments History tab on the left.

Invoices Page

An invoice represents a confirmation of payment. The Invoices page enables you to view the list of invoices generated for an order.

You can generate an invoice individually or together with a shipment. If the products in an order are shipped in multiple shipments, then an invoice is generated for each shipment for the products in that shipment.

Credit Memos

The Credit Memos page displays a list of the refunds given for products in this order.

You can click on a credit memo in the list to display the refund details.

Shipments Page

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be created per order.

The Shipment page displays a list of the shipments sent for products in this order.

You can click on a shipment in the list to display the shipment details.

On the Shipment page, you can also add tracking numbers that were received from shipping service providers. The tracking number enables customers to learn the status of the shipments in their orders using the My Account option that appears in the header of the frontend. For the supported shipping service providers you can create and print shipping labels from the Shipment page.

Comment History Page

The Comment History page enables you to view a list of comments that have been added to the order record over the course of its life cycle. It is a good practice to add comments at every stage of the order, especially if problems come up.

Transactions Page

The Transactions page enables you to view a list of transactions that are associated with this order.

Creating New Orders

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

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

To create a new order from the backend:

1. Select Sales > Orders.
2. Click the Create New Order button on the top right.

A full description of this procedure is provided in “Managing Orders,” page 227.

Managing Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to submit their opinions, feedback, and comments about

products. Product reviews and ratings can also be added using the backend. To access the ratings and reviews management features, select Catalog > Reviews and Ratings.

For more information about ratings and reviews, see “Managing Customer-Generated Content,” page 235.

Generating Reports

Magento CE provides a variety of reports that you can access at any time. These reports are available under the Reports menu at the top of the Admin Panel.

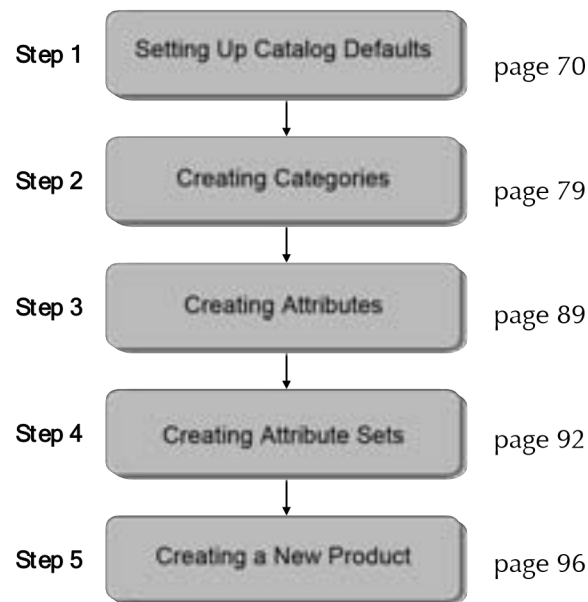
Some of the most important reports are described in “Reports,” page 243.

8 Setting Up Your Catalog

This chapter describes how to create a catalog for your Magento CE web store, how to add products, and how to define their attributes.

Overview

The best workflow for creating your products is as follows:



The following describes the process depicted above:

- ❖ Step 1: “Setting Up Catalog Defaults,” page 70. This step describes how to set basic catalog default configurations that define its behavior.
- ❖ Step 2: “Creating Categories,” page 79. The next step is to create the categories that will contain your products. Each product can be assigned to one or more categories.

A Magento CE store with Sample Data provides three such categories:

Furniture, Electronics, and Apparel. Categories can have multiple levels of subcategories. A customer can click on a category to see a drop-down list of

subcategories, such as Cell Phones, Cameras, and Computers, as shown in Figure 69.

Furniture	Electronics	Apparel
	Cell Phones	
	Cameras	
	Computers	

Figure 69. Categories and Subcategories

Setting Up Your Catalog

- ❖ Step 3: Creating Attributes, page 89. Next, you can create the attributes that represent a product’s characteristics. Attributes are a powerful Magento CE concept to make finding and comparing products easier.
- ❖ Step 4: Creating Attribute Sets, page 92. Attribute sets are logical groups of attributes that simplify the process of assigning attributes to a product. They do not appear in the front-end user interface.
 - Creating a New Attribute Group, page 94. Part of the process of creating an attribute set is to create attribute groups. These groups determine how attributes appear in the backend when defining a product.
- ❖ Step 5: Creating a New Product, page 96. This step shows how to fill in product information in order to maximize conversion and how to assign Categories to help customers navigate to the products of interest to them. Attribute sets and attributes are assigned to products to describe them, provide multiple options and help the customer search through the product list.



Setting Up Catalog Defaults

The first step to creating your catalog is to configure the catalog system default settings. In many cases, these settings can be overridden at lower levels (such as in individual categories and products).

To configure catalog defaults:

In the Admin Panel, select System > Configuration > CATALOG > Catalog. In the Current Configuration Scope drop-down, select the scope of this configuration. The following describes some of the more important sections in the page.

Frontend

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



The screenshot displays the 'Frontend' configuration section in the Magento Admin Panel. It contains several settings for product listing:

- List Mode:** A dropdown menu set to 'Grid (default) / List' with a '[STORE VIEW]' link.
- Products per Page on Grid Allowed Values:** A text input field containing '9,15,30' with a '[STORE VIEW]' link.
- Products per Page on Grid Default Value:** A text input field containing '9' with a '[STORE VIEW]' link.
- Products per Page on List Allowed Values:** A text input field containing '5,10,15,20,25' with a '[STORE VIEW]' link.
- Products per Page on List Default Value:** A text input field containing '10' with a '[STORE VIEW]' link.
- Allow All Products per Page:** A dropdown menu set to 'No' with a '[STORE VIEW]' link.
- Product Listing Sort by:** A dropdown menu set to 'Best Value' with a '[STORE VIEW]' link.
- Use Flat Catalog Category:** A dropdown menu set to 'No' with a '[GLOBAL]' link.
- Use Flat Catalog Product:** A dropdown menu set to 'No' with a '[GLOBAL]' link.
- Allow Dynamic Media URLs in Products and Categories:** A dropdown menu set to 'Yes' with a '[STORE VIEW]' link.

Below the 'Allow Dynamic Media URLs' setting, there is a note: 'E.g. {{media url="path/to/image.jpg"}} {{skin url="path/to/picture.gif"}}. Dynamic directives parsing impacts catalog performance.'

Figure 70. Catalog Frontend Configuration

- ❖ List Mode
 - Grid Only: The products are displayed only in a grid structure.
 - List Only: The products are displayed only in a list.
- Grid (Default)/List: The products are displayed in a grid structure by default, but your customers are able to switch to list.
- List (Default)/Grid: The products are displayed in a list structure by default, but your customers are able to switch to grid.
- ❖ Products per Page: For each display type (List and Grid), specify the following:
 - Specify, in a comma-separated list, what the options are for the number of products to display on a product page. These options will be listed in a drop-down list on the frontend.
 - Specify how many products are displayed on a page by default.
- ❖ Allow All Products per Page: Select whether the customers are allowed to display all products on a single category page.
- ❖ Product Listing Sort By: The products are sorted, by default, by the selected attribute. The Best Value products are featured products as determined by the store administrator; for more information, see “Creating Categories,” page 79. The customer can select from the other options on a per-page basis.

You can configure attributes to be used for sorting using the Used for Sorting in Product Listing setting of an attribute. For details, see “Managing Product Attributes,” page 88.

Setting Up Your Catalog

- ❖ **Use Flat Catalog Category:** Selecting Yes “flattens” multiple category database tables into a single table for increased performance on the frontend. Magento recommends selecting Yes for any size catalog.
- ❖ **Use Flat Catalog Product:** Selecting Yes “flattens” multiple product database tables into a single table for increased performance on the frontend. Magento recommends selecting Yes if your catalog contains more than 1,000 SKUs
- ❖ **Allow Dynamic Media URLs in Products and Categories:** Selecting No can improve performance

Sitemap

This section determines how your site map is displayed to customers.

- **Use Tree Like Category Sitemap:** Selecting Yes displays the site map as a tree, showing all categories and subcategories as branches. Selecting No displays the categories and subcategories in a single column.
- **Minimum Lines per Page:** Determines the number of lines on each page when the site map is distributed among several pages.

Product Reviews

This section enables unregistered guests in your store to write product reviews.

Product Alerts

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

how to configure email templates and email sender addresses, see “Customizing Transactional Emails,” page 177.

Product Alerts		
Allow Alert When Product Price Changes	No	[STORE VIEW]
Price Alert Email Template	Product price alert (Default Template from Local)	[STORE VIEW]
Allow Alert When Product Comes Back in Stock	No	[WEBSITE]
Stock Alert Email Template	Product stock alert (Default Template from Local)	[STORE VIEW]
Alert Email Sender	General Contact	[STORE VIEW]

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

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

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

Product Alerts Run Settings

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

- ❖ **Frequency:** Choose how often product alerts are sent out: Daily, Weekly, or Monthly.
- ❖ **Start Time:** Choose what time of day the product alert process starts. This time should be after any price or inventory updates are performed.

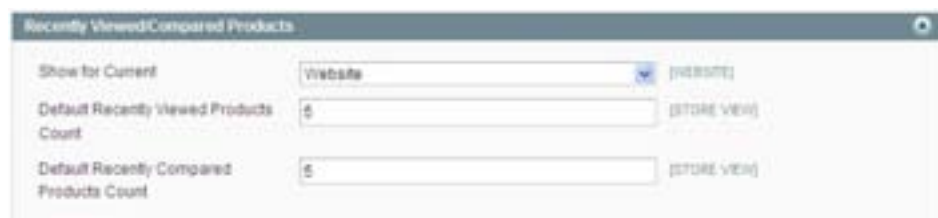
- ❖ **Error Email Recipient:** Identify the email address of the person (normally a store administrator) who should receive an email notification when there is an error in the product alert process.
- ❖ **Error Email Sender:** Select the role that the email will be “from.”
- ❖ **Error Email Template:** Select the email template to use for product alert error notifications. For more information, see “Customizing Transactional Emails,” page 177.

Product Image Placeholders

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

Recently Viewed/Compared Products

This feature is described in detail in “Recently Viewed,” page 45. The configuration section enables you to specify how many products are shown by default in each list.



Recently Viewed/Compared Products	
Show for Current	Website [WEBSITE]
Default Recently Viewed Products Count	5 [STORE VIEW]
Default Recently Compared Products Count	5 [STORE VIEW]

Figure 71. Recently Viewed/Compared Products Settings

Price

The Price section contains only the Catalog Price Scope drop-down list, in which you can select the scope of the base currency (Global or Website).

Layered Navigation

The Layered Navigation section enables you to choose whether the price ranges that are displayed in the layered navigation tool are calculated automatically or manually. If you select Manual, the Default Price Navigation Step field becomes visible, enabling you to specify the default size of the price ranges.

Category Top Navigation

The Category Top Navigation section enables you to define how many levels of subcategories are displayed by clicking on a category in the top navigation bar on the frontend. Setting this value to 0 (zero) enables all levels to be displayed. If you have a large number of subcategory levels, this can potentially make it difficult for the user to navigate.

Search Engine Optimizations

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

The screenshot shows the 'Search Engine Optimizations' configuration panel. It contains the following settings:

Setting	Value	Action
Autogenerated Site Map	Enable	[STORE VIEW]
Popular Search Terms	Enable	[STORE VIEW]
Product URL Suffix	html	[STORE VIEW]
	= Cache refresh needed.	
Category URL Suffix	html	[STORE VIEW]
	= Cache refresh needed.	
Use Categories Path for Product URLs	Yes	[STORE VIEW]
Create Permanent Redirect for old URLs if url key changed	Yes	[STORE VIEW]
Page Title Separator	-	[STORE VIEW]
Use Canonical Link Meta Tag For Categories	No	[STORE VIEW]
Use Canonical Link Meta Tag For Products	No	[STORE VIEW]

Figure 72. Search Engine Optimization Settings

- ❖ **Auto generated Site Map:** Enable this feature to display a Site Map link in the footer of the frontend pages. This enables a customer to view an automatically generated site map including a list of all of your existing categories. In addition to the auto-generated site map, Magento CE enables integration with Google Sitemap. More information is provided on the following pages.
- ❖ **Popular Search Terms:** Enable this feature to display a Search Terms link in the footer of the frontend pages. This enables customers to link to a list of all search terms. This is an SEO feature because each of these search terms counts as a link to your site and is explored by search engines to discover content on your site.
- ❖ **Product URL Suffix and Category URL Suffix:** These options determine which suffix is displayed on each product and category page. Typically this value will be .html or .htm. When you change this value (and click Save Config), you must perform a cache refresh by selecting System > Cache Management and clicking Flush Magento Cache.
- ❖ **Use Categories Path for Product URLs:** This option determines how the URL is composed. Select Yes to specify that the URL links for products include the associated category and a separate link is generated for each associated category. Select No to specify that the URL rewrites include only the product name and that there is only one link for each product, regardless of how many categories the product is associated with.
- ❖ **Create Permanent Redirect for old URLs if URL key changed:** Selecting Yes automatically creates a redirect for the old URL that points to the new URL if a page is moved. Doing so eliminates the “404 Not Found” error message that customers see if a page they had bookmarked is moved.
- ❖ **Page Title Separator:** Specify a character to replace the space character () with when the system uses the page title to construct the page’s URL. Typically you would use an underscore () or hyphen (-).
- ❖ **Use Canonical Link Meta Tag For Categories and Use Canonical Link Meta Tag For Products:** Select whether to add a tag to each category or product page that points to a “preferred” URL for search engines to index when encountering pages that contain the same content (but which may be sorted differently, for instance).

Catalog Search

The options in this section define how the catalog search feature behaves.

- ❖ Minimal Query Length: Defines the minimum number of characters that the customer must specify in the Search field on the frontend.
- ❖ Maximum Query Length: Defines the maximum number of characters that the customer may specify in the Search field.
- ❖ Maximum Query Words Count: Define the maximum number of terms that can be specified in the Search field. This limit applies to the “Like” search type only.
- ❖ Search Type: Define the type of search that is performed:
 - Like: Includes only results that are close in spelling to the specified search terms.
 - Fulltext: Includes only results that exactly match the specified search terms.
 - Combine (Like and Fulltext): Includes both exact matches and close matches.
- ❖ Apply Layered Navigation if Search Results are Less Than: Defines the maximum number of results for which layered navigation can be applied. If the number of results is more than this number, then the results are presented as a simple list. If you specify 0, then layered navigation is always applied. Limiting the number of results can increase performance.

Downloadable Products Options

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



The screenshot shows a configuration window titled "Downloadable Product Options". It contains several settings, each with a label, a value field, and a scope indicator in parentheses:

- Order Item Status to Enable Downloads:** The value is "Invoice" and the scope is "[WEBSITE]".
- Default Maximum Number of Downloads:** The value is "0" and the scope is "[WEBSITE]".
- Shareable:** The value is "No" and the scope is "[WEBSITE]".
- Default Sample Title:** The value is "Samples" and the scope is "[STORE VIEW]".
- Default Link Title:** The value is "Links" and the scope is "[STORE VIEW]".
- Open Links in New Window:** The value is "Yes" and the scope is "[WEBSITE]".
- Use Content-Disposition:** The value is "inline" and the scope is "[STORE VIEW]".
- Disable Guest Checkout if Cart Contains Downloadable Items:** The value is "Yes" and the scope is "[WEBSITE]". Below this field is a note: "• Guest checkout will only work with shareable."

Figure 73. Downloadable Products Options

- ❖ **Order Item Status to Enable Downloads:** Controls whether customers can access their downloadable product links immediately after the order is placed or only after the invoice is created for the order.
- ❖ **Default Maximum Number of Downloads:** Controls how many times a downloadable product may be downloaded by the customer after it has been purchased.
- ❖ **Shareable:** Setting this option to Yes enables non-registered customers (guest customers) to access their downloads. This is the only option for customers to access their products if you want to offer guest checkout or quick checkout methods, such as PayPal Express or Google Checkout. This setting can be overridden at the product level.
- ❖ **Default Sample Title and Default Link Title:** These settings control what is displayed throughout the store when referring to samples and downloadable products (links).
- ❖ **Open Links in New Window:** Controls whether the download page opens in a new window.
- ❖ **Use Content-Disposition:** Controls whether the content is opened in a browser window or downloaded.
- ❖ **Disable Guest Checkout if Cart Contains Downloadable Items:** This setting disables the Guest Checkout option only if there are downloadable items in a cart, and leaves it enabled if a customer is purchasing other products. If you set this option to Yes, be sure to set the Shareable option to Yes as well.

Date and Time Custom Options

The options in this section control how dates and times are displayed in your store.

- ❖ **Use JavaScript Calendar:** Enables your store to present a JavaScript-powered calendar date picker in any field that requires the customer to select a date. When this option is set to No, then drop-down lists are provided to select the date and time.
- ❖ **Date Fields Order and Time Format:** Select the order in which the day, month, and year values are presented in the format xx/yy/zz., and select a 12-hour (a.m./p.m.) or 24-hour time format. These fields are important for store views that are targeted for specific countries that use date and time formats that are different from your local custom.
- ❖ **Year Range:** Indicate the range of years that is available for selection in either the JavaScript calendar or calendar drop-down lists. Use a four-digit year format.

Managing Categories

This section describes how to display, create, and edit categories and subcategories.

The products in the web store are grouped into categories. Categories enable you to give your store structure and form. In Magento CE, each store you create is assigned to a unique category. Any other category that you want to use in your store must be created as a subcategory. All categories are technically considered subcategories because you are placing them under the root category. See Figure 74.

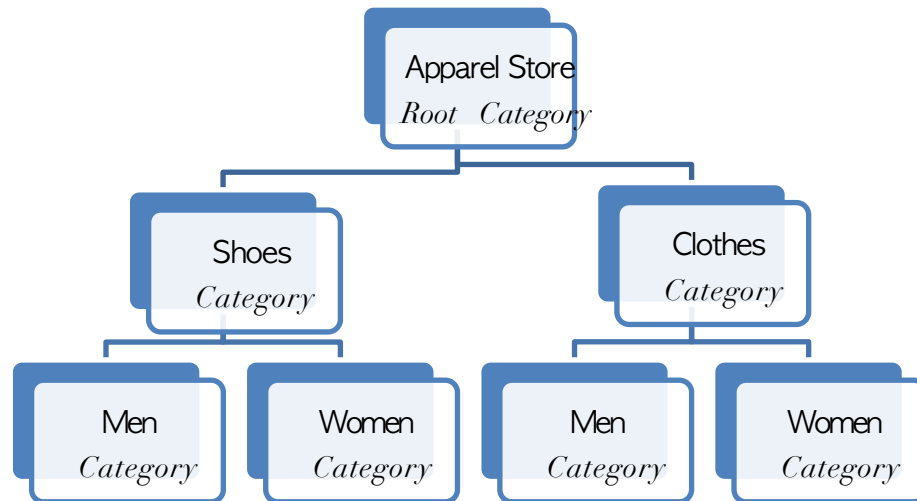


Figure 74. Example Category Structure

The way category names are displayed on the frontend depends on the layout. If the default theme is used for the web store, categories are shown in a bar near the top of the store web page.

Each product can be assigned to one or more categories, as described in “Finding the Right Products,” page 38.

Displaying Categories

To display a list of all defined categories:

Select Catalog > Manage Categories. The categories are listed in a tree view on the left, as shown in Figure 75.

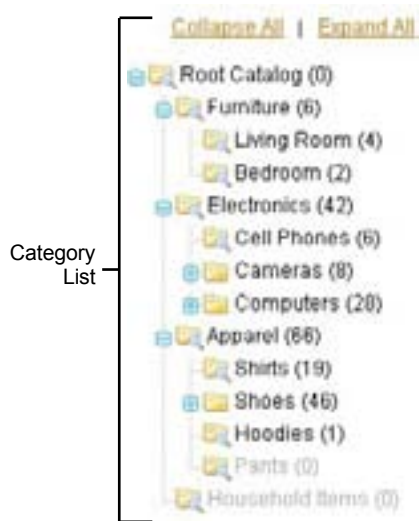


Figure 75. Category List

If you have loaded Sample Data, these sample categories (Furniture, Electronics and Apparel) will appear in the category tree. Disabled categories are listed in gray text.

Creating Categories

This section describes the most important steps in creating a category.

To create a new category:

- ❖ To create a new root category, make sure that Choose Store View in the upperleft corner of the page is set to Default Config, and click Add Root Category.
- ❖ To create a subcategory, select the parent category (it can be either a root category or a category) in the list and click Add Subcategory.

Four tabs of information are provided to describe this category: General Information, Display Settings, Custom Design, and Category Products. Click each tab and specify the requested information, as described below.

Note: Required fields appear with a red asterisk (*).

General Information Tab

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

The screenshot shows a web form titled "General Information" with a dark blue header. The form contains several fields and buttons:

- Name ***: A text input field with a "[STORE VIEW]" link to its right.
- Is Active ***: A dropdown menu currently set to "No" with a "[STORE VIEW]" link to its right.
- URL Key**: A text input field with a "[STORE VIEW]" link to its right.
- Thumbnail Image**: A text input field followed by a "Browse..." button and a "[STORE VIEW]" link to its right.
- Description**: A large text area with a "[STORE VIEW]" link to its right.
- WYSIWYG Editor**: An orange button located below the description field.
- Image**: A text input field followed by a "Browse..." button and a "[STORE VIEW]" link to its right.
- Page Title**: A text input field with a "[STORE VIEW]" link to its right.
- Meta Keywords**: A large text area with a "[STORE VIEW]" link to its right.
- Meta Description**: A large text area with a "[STORE VIEW]" link to its right.
- Include in Navigation Menu ***: A dropdown menu currently set to "Yes" with a "[STORE VIEW]" link to its right.

Figure 76. Create a New Category – General Information

1. Specify a name for this category in the Name field.
2. Set the Is Active field to Yes to specify that this category appears in the store.

3. In the URL key field you can specify a relative URL path which can be entered in place of the standard Target Path. It is “search engine friendly” because it can use the name of the category instead of the ID number. If you leave this field blank, Magento CE will automatically generate a URL with the name of the category upon creation of the category. If you enter a value here manually, you cannot use spaces in this field. The URL key field is not displayed for root categories.
4. For Thumbnail Image, use the Browse button to select and upload a thumbnail image to represent the category.
5. Specify a description in the Description text box. This description is presented on the frontend.

Note: You can use HTML tags in this text box. Alternatively, click the WYSIWYG Editor button to open a full-function HTML editor. The “What You See Is What You Get” (WYSIWYG) Editor includes a spelling checker, for which you need to download and install a plug-in for your browser.

- 6 The Image field is used for a category image. Click the Browse button next to the field to select the file. This image will appear in the frontend for each category's page between the category name and the content.
- 7 In the Page Title field, specify the title of the page, which will be displayed on the browser tab header when the customer opens this category page.
- 8 In the Meta Keywords and Meta Description text boxes, specify the keywords and description for search engines to use for this category when indexing your site.
- 9 Select Yes for Include in Navigation Menu so that the category will appear in the navigation menu on the frontend.
10. Click Save Category to save your changes.

Display Settings Tab

The Display Settings tab enables you to specify how this category is presented to the customer.

The screenshot shows the 'Display Settings' form with the following configurations:

- Display Mode:** Products only (STORE VIEW)
- CMS Block:** Please select a static block... (STORE VIEW)
- Is Anchor:** No (GLOBAL)
- Available Product Listing Sort By:** A list box containing 'Best Value', 'Name', and 'Price' (STORE VIEW)
- Default Product Listing Sort By:** Best Value (STORE VIEW)
- Layered Navigation Price Step:** Use Config Settings (STORE VIEW)

Figure 77. Create a New Category – Display Settings

1. In the Display Mode field, select one of the following options to specify how you would like your category page to appear:
 - ❖ Static block only
 - ❖ Static block and product list below it
 - ❖ Product list only
2. In the CMS Block field, select the static block that you would like to be shown for this category (if selected in the Display Mode field). This block must first be created in the CMS section; for more information, see “Managing CMS Pages,” page 174.
 - ❖ In the Is Anchor field, select Yes to specify that this category page is an anchor. Anchors are used for the layered navigation in Magento CE, as described in “Layered Navigation,” page 84.
 - If you set the category to be an anchor for Layered Navigation, then your web store displays the subcategories of this category in the SHOP BY panel on the left. This area also shows a linked list of the filterable attributes of the products in this category and its subcategories.
 - Figure 78 shows the SHOP BY panel for the Apparel category, which is set as an anchor.



Figure 78. Anchored Category

3. For Available Product Listing Sort By, specify the attributes by which the customer can sort the list of products in this category. By default, all available attributes can be used for sorting; clear the Use All Available Attributes check box to modify the list.
4. For Default Product Listing Sort By, select the attribute by which the product list is sorted by default. This is set in the catalog configuration (see “Setting Up Catalog Defaults,” page 70), but you can clear the Use Config Settings check box to select a default sorting attribute for this particular category.
5. For Layered Navigation Price Step, specify the size of the price range to be used when calculating the price “buckets” for the Layered Navigation. This is set in the catalog configuration, but you can clear the Use Config Settings check box to specify a price range size for this particular category.

Custom Design Tab

The Custom Design tab contains additional settings to control the theme and layout updates that are used for this category page. Depending on the settings they can also affect child pages as well. All of these settings are optional. For more information about custom designs and page layouts, see “Design and Content,” page 169.

1. For Use Parent Category Settings, choose Yes to “inherit” the settings of this subcategory from its parent category. Doing so ensures a consistent look within a category family, and disables all other settings on this page. This setting is not available for root categories.

- 2 For Apply to Products, select Yes to apply the category page settings to the product pages of the products in this category.
- 3 Select a custom design from the Custom Design drop-down list. Magento CE comes with several custom designs already defined, and you can modify these custom designs or create your own. For more information, see “Managing CMS Pages,” page 174.
- 4 For the Active From and Active To fields, select the start and end dates for this custom design to be applied to this category. If you do not select a start date, the custom design is applied immediately. If you do not select an end date, the custom design is applied to this category until you manually deactivate it.
- 5 For Page Layout, select a layout from the drop-down list.
 - ❖ No layout updates: Uses the default settings that come with the Magento CE installation
 - ❖ Empty: Displays the category page without any objects, except for the content (products or static blocks only), category name, and view options (number to display per page, view as grid or list, and sort by options)
 - ❖ 1 column: Displays the contents, category name and view options, as well as the header, footer, search field, and navigation bar
 - ❖ Column on the left: Adds the left column to the 1 column display, which by default includes the currency selection and layered navigation
 - ❖ Column on the right: Adds the right column to the 1 column display, which by default includes the shopping cart view, wishlist, compared products list, polls, and newsletter sign-up
 - ❖ 3 columns: Displays both the left and the right columns
- 6 The Custom Layout Update is essentially a static block, with a few differences. Rather than HTML, the structure must be in XML format. The Update will appear at the bottom of the page, below the products, whereas a static block will appear above the products (if the static block is set to display with products). The custom layout update will appear on the page only during the dates specified in the Active From and Active To date range.

7. Click Save Category to save your changes.

Catalog Products Tab

This tab enables you to specify the products that belong to this category.

Note: You can also assign a product to a category when editing a product's record. For more information, see "Managing Products," page 95.

Page 1 of 1 pages | View 25 per page | Total 6 records found

	ID	Name	SKU	Price	Position
Qty				From: To:	From: To:
<input type="checkbox"/>	6	Cat picture	123954991	\$1.00	
<input type="checkbox"/>	5	Configurable product	ssdfstf	\$1.00	
<input type="checkbox"/>	4	Product 4	32asdf	\$165.00	
<input type="checkbox"/>	3	Product 3	333	\$150.00	
<input type="checkbox"/>	2	Product 2	22asd	\$120.00	
<input type="checkbox"/>	1	Product 1	1111	\$100.00	

Figure 79. Creating a New Category – Products

1. If needed, use the filter fields at the top of the table to filter the list of products. Click Reset Filter to clear all filter settings.
2. Select the check box in the left column for each product that belongs in this category. Remember that a product can be assigned to more than one category.
3. In the Position column, specify a whole number that indicates the order in which the product is listed when the products are sorted by Best Value. The product with a Position value of 1 is listed first, 2 is listed second, and so on. If more than one product has the same value for Position, the product with the lowest (that is, closest to 1) ID number is listed first.
4. Click Save Category to save your changes. You may need to refresh the page to display the category in the tree.

Editing Categories

To edit a Category:

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

Layered Navigation

What is Layered Navigation?

Of course, you want the customers browsing through your site to find the products that interest them in the fastest possible way. Otherwise, your sales opportunities are lost. When a customer is confronted with a category containing 60 products spread across multiple pages, most customers simply leave the site when they cannot find what they need on the first page. Magento CE enables you to provide customers with the option to find the products that they want by making a selection from a variety of filters, such as price, manufacturer, or any other aspect of the products, as shown in Figure 80. Layered navigation information is shown on category listing pages while searching for products. Show your customers what they want and you will raise conversions!

The example in Figure 80 shows an enabled layered navigation filter by PRICE range and COLOR.



Figure 80. Layered Navigation

Default Layered Navigation

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

- **PRICE:** Price ranges are selected logically in order to provide another filter for navigation. The ranges themselves are determined by the prices of products contained within them. There are never more than ten price ranges displayed at a time and products are distributed accordingly.
- **CATEGORY:** If you define a category as an Anchor Category (see “Display Settings Tab,” page 81), its subcategories are displayed as layered navigation options.

Figure

80 shows that the first filter is CATEGORY and it features two options: Shirts and Shoes. In this example, Shirts and Shoes are subcategories of the category that is represented by this layered navigation block.

Defining Layered Navigation Filters

The additional filters in Figure 80 are Manufacturer and Shoe Type. These are product attributes that have been selected as filterable. This is defined in the Use in Layered Navigation field under Catalog > Attributes, as described on page 89.

There are two types of filterable attributes:

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

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

Price Layered Navigation

The Price Layered Navigation algorithm enables you to create price ranges so that products are evenly distributed among ranges. You can also split each range iteratively.

The enhanced configuration controls for the Price Layered Navigation feature were introduced in Magento CE version 1.7 and Magento EE version 1.12.

Configuring the Price Layered Navigation Algorithm

The algorithm for calculating the price layered navigation is configured in the Magento Admin Panel under System > CATALOG > Catalog > Layered Navigation.

To set and configure the new price layered navigation algorithm:

1. Log in to the Magento Admin Panel.

- 2 Navigate to System › Configuration › CATALOG › Catalog.
- 3 In the Current Configuration Scope in the upper-left corner of the page select the desired store view.
- 4 Expand the Layered Navigation field set. In the Display Product Count field, decide whether the number of products which fall into a price range will be displayed.
- 5 In the Price Navigation Step Calculation field select Automatic (equalize product counts). Additional options appear.

Note: The Automatic (equalize price ranges) option of the Price Navigation Step Calculation field is similar to the Automatic option which was available in the previous versions of Magento. If you select the Automatic (equalize price ranges) option, the previously existing price layered navigation algorithm will be used.

- 6 In the Display Price Interval as One Price field, decide what will be the system behavior if all products which fall into a certain price range have the same price. Select Yes if you want to display a single price (not the range finite values).
- 7 In the Interval Division Limit field, specify the threshold for a number of products within a price range after which the range cannot be further split. The default value is 9.
- 8 To save the changes click Save Config.

Price Layered Navigation Algorithm: Store Customer Experience

The price layered navigation algorithm provides the optimal distribution of products among price ranges. In addition, the feature provides iterative splitting of price ranges.

Previously, if a customer selected to view products from a certain price range, there was no further subdivision to smaller price ranges on the resulting catalog page. For example, if a store customer clicked the \$0.00-\$99 range, the price filter on the page with a list of products contained the selected range only. See Figure 81.



Figure 81. Store customer experience with price layered navigation in Magento Enterprise 1.11 and earlier

With the iterative splitting feature, after a customer chooses to view the \$0.00-\$99 range, the price filter on the page with a list of products can contain several sub-ranges.

See Figure 82.

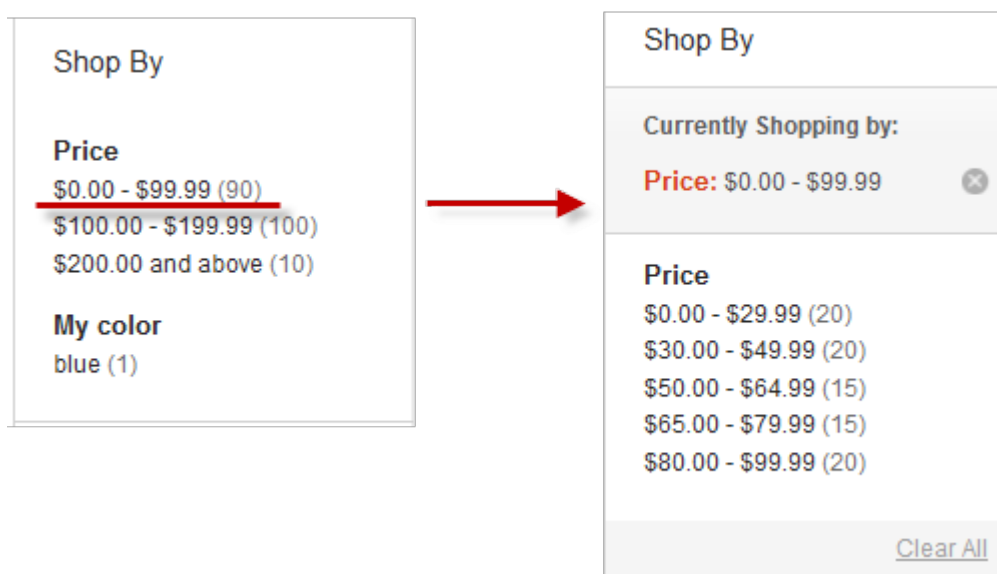


Figure 82. Store customer experience with price layered navigation in Magento Enterprise 1.12

Note: A price range is not further splitted after the number of products which fall into this range reaches the threshold set in the Interval Division Limit field under System > Configuration > CATALOG > Catalog > Layered Navigation.

Managing Product Attributes

What is an Attribute in Magento?

An attribute represents a property of a product, such as: its name, image, SKU, color, manufacturer, and so on. Attributes enable you to add new product properties without having to write a single line of code or to add any columns to your database. Understanding attributes is crucial for making your store easy to use for customers.

You assign attributes to your products in order to enable your customers and search engines to find them more easily. Your Magento CE web store automatically displays products according to their attributes, for easy accessibility by your customers, in the SHOP BY layered navigation panel on the left of your web store, as shown in Figure 83.



Figure 83. Category Page with Layered Navigation

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

System attributes define the properties that are required by the store to function properly.

These attributes cannot be deleted.

You can add as many additional attributes as desired. In the Magento CE backend you can define attributes in sets. Attribute sets ease the definition process so that similar products can be created with the same attributes. Attribute sets enable you to assign multiple attributes to a product at one time by assigning an entire attribute set to a product.

If a store sells televisions, shoes, books, and power tools, then four attribute sets could be defined: one specific to televisions, one for shoes, and so on. When a new

Setting Up Your Catalog

power tool product is added to your catalog, you can simply select the “Power Tool” attribute set to add the relevant attributes to this product.

You should first define attributes, then define attribute sets and assign the relevant attributes to the attribute sets, as described in this section.

Creating Attributes

Attributes must be defined before defining attribute sets and products.

Note: Only attribute sets can be assigned to a product, not individual attributes.

To define attributes:

1. Select Catalog > Attributes > Manage Attributes. A list of existing attributes is displayed, as shown in Figure 84.

Attribute Code	Attribute Label	Visible	Scope	Required	Unique	Searchable	Used in Product Catalog	Comparable
activation_information	Activation Information	Yes	Global	No	No	No	No	No
active_from_date	Active From Date	No	Store View	No	No	No	No	No
active_to_date	Active To Date	No	Store View	No	No	No	No	No
color	Color	Yes	Global	No	No	Yes	Filterable (no results)	Yes
compare_individuals	Compare	Yes	Global	No	Yes	Yes	Filterable (no results)	Yes
content_html	Content HTML	Yes	Store View	No	No	No	Filterable (no results)	Yes
cost	Cost	No	Website	No	No	No	No	No
create_date	Create Date	Yes	Global	No	No	Yes	No	Yes
css_class	CSS Class	No	Store View	No	No	No	No	No
customer_group	Customer Group	No	Store View	No	Yes	No	No	No
customer_group_html	Customer Group HTML	No	Store View	No	Yes	No	No	No
customer_group_id	Customer Group ID	No	Store View	No	Yes	No	No	No
customer_group_name	Customer Group Name	No	Global	No	Yes	No	No	No
description	Description	Yes	Store View	Yes	No	Yes	No	Yes
dimension	Dimension	Yes	Global	No	No	Yes	No	Yes
display_group_html	Not available for purchase with Group HTML	Yes	Global	No	Yes	No	No	No
display_group_html	Price	Yes	Global	No	No	Yes	No	Yes
gender	Gender	No	Global	No	No	No	No	No
gender	Gender	No	Global	Yes	No	Yes	No	No
gift_message_available	Gift Message Available	No	Global	No	Yes	No	No	No

Figure 84. Manage Attributes Page

- 2 Click Add New Attribute to display the New Product Attribute page (Figure 85) in which you can define a new attribute.

The image shows two sections of a form for configuring a new product attribute.

Attribute Properties

- Attribute Code ***: A text input field with a note: "For internal use. Must be unique with no spaces."
- Scope**: A dropdown menu set to "Store View" with a note: "Declare attribute value saving scope."
- Catalog Input Type for Store Owner**: A dropdown menu set to "Text Field".
- Default value**: A text input field.
- Unique Value**: A dropdown menu set to "No" with a note: "Not shared with other products."
- Values Required**: A dropdown menu set to "No".
- Input Validation for Store Owner**: A dropdown menu set to "None".
- Apply To ***: A dropdown menu set to "All Product Types".

Frontend Properties

- Use in Quick Search**: A dropdown menu set to "No".
- Use in Advanced Search**: A dropdown menu set to "No".
- Comparable on Front-end**: A dropdown menu set to "No".
- Use in Layered Navigation**: A dropdown menu set to "No" with a note: "Can be used only with catalog input type Dropdown, Multiple Select and Price."
- Use in Search Results Layered Navigation**: A dropdown menu set to "No" with a note: "Can be used only with catalog input type Dropdown, Multiple Select and Price."
- Use for Promo Rule Conditions**: A dropdown menu set to "No".
- Position**: A text input field with a note: "Position of attribute in layered navigation block."
- Allow HTML Tags on Frontend**: A dropdown menu set to "Yes".
- Visible on Product View Page on Front-end**: A dropdown menu set to "No".
- Used in Product Listing**: A dropdown menu set to "No" with a note: "Depends on design theme."
- Used for Sorting in Product Listing**: A dropdown menu set to "No" with a note: "Depends on design theme."

Figure 85. New Product Attribute Page

3. In the Attribute Code field, specify a unique identifier for this attribute. Do not use spaces. The code does not appear on the frontend.
4. In the Scope field select the scope to which this attribute applies.
5. The Catalog Input Type for Store Owner setting controls how a store administrator specifies values for attributes. For descriptive textual attributes, you can use the Text Field or Text Area types; for list prices you use the Price type. Note that not all types can be used for layered navigation.

Setting Up Your Catalog

- 6 If this attribute has a default value, specify it in the Default Value field.
- 7 If the value of the attribute must be unique for each product (for example, a SKU number), select Yes for Unique Value.
- 8 If the value of the attribute cannot be blank for any product, select Yes for Values Required.

- 9 In the Input Validation for Store Owner field, select the type of validation that should be enforced on values of this attribute. For example, if the values of this attribute will be email addresses, select Email to cause the system to check each entered value of this attribute against the rules for valid email addresses.
- 10 If this attribute will apply only to certain Magento CE product types, select Selected Product Types for Apply To. In the list that appears, select one or more product types for this attribute (use Ctrl+click to select multiple items).
- 11 For Use in Quick Search and Use in Advanced Search, select Yes to enable the quick search and advanced search tools to search this attribute's values.
- 12 For Comparable on Front-end, select Yes to have this attribute appear in the compare window when products are compared.
- 13 The Use in Layered Navigation field defines whether the attribute is used in layered navigation. The following options are available:
 - ❖ Filterable (with results): Only those attribute values that correspond to the existing products in your frontend catalog will be used in the layered navigation.
 - ❖ Filterable (no results): All values of the attribute that you have created on the Manage Label / Options tab will be listed.
 - ❖ No: Not used in layered navigation.

Note that only attributes with the Dropdown, Multiple Select, or Price input type can be used in layered navigation.
- 14 The Use for Promo Rule Conditions, field defines whether the attribute can be used in defining conditions for catalog and shopping cart price rules.
- 15 The Position parameter determines the position of the attribute in the layered navigation block with respect to other filterable attributes.

16. In the Visible on Product View Pages on Frontend field, select Yes to specify that this attribute appears in the Additional Information part of a product's page in the web store, as shown in Figure 86.

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

Figure 86. Attributes on the Additional Information Panel

17. For Allow HTML Tags on Frontend, select Yes to enable HTML tags that are specified in this attribute's values to be honored on the frontend.
18. For Used in Product Listing, select Yes to list values of this attribute in the product listing.
19. For Used for Sorting in Product Listing, select Yes to enable the product list to be sorted by values of this attribute.
20. Click Manage Label/Options at the top left of the page to display the Manage Label/Options page, as shown in Figure 87.

Figure 87. Manage Label/Options Page

21. In the Mange Titles box, specify a display name for this attribute for each store view. If you specify a value only in the Admin field, that value will be used in all cases.

22. For attributes with an input type of Dropdown or Multiple Select, you can enter values that can be specified for the attribute. To add a value, click the Add Options button. You can specify a different label for the value for each store view and set the default value by selecting the Is Default option button. For the Dropdown input type, you can select the Is Default option button only for one attribute value. For the Multiple Select input type, you can select multiple values by selecting the Is Default check box next to the desired attribute values.



Figure 88. Attribute Value Specifications

23. Click Save Attribute.

Creating Attribute Sets

An attribute set is a collection of attributes, customized to fit certain types of products. All attribute sets must contain all of Magento's system attributes, but you can customize them to include different combinations of simple attributes. Only attribute sets (not individual attributes) can be assigned to a product. If you want to add a small number of attributes, you can add them to the Default set, but if you want to add attributes that will be applied only to a subset of products, it is advisable to create an attribute set for each set of attributes that you want to assign to products. An attribute set can inherit attributes from another attribute set. This feature saves you from redefining sets of attributes that apply to many different products.

Setting Up Your Catalog

To create a new attribute set:

1. In the Admin Panel, select Catalog > Attributes > Manage Attribute Sets. A list of existing attribute sets is displayed, as shown in Figure 89.

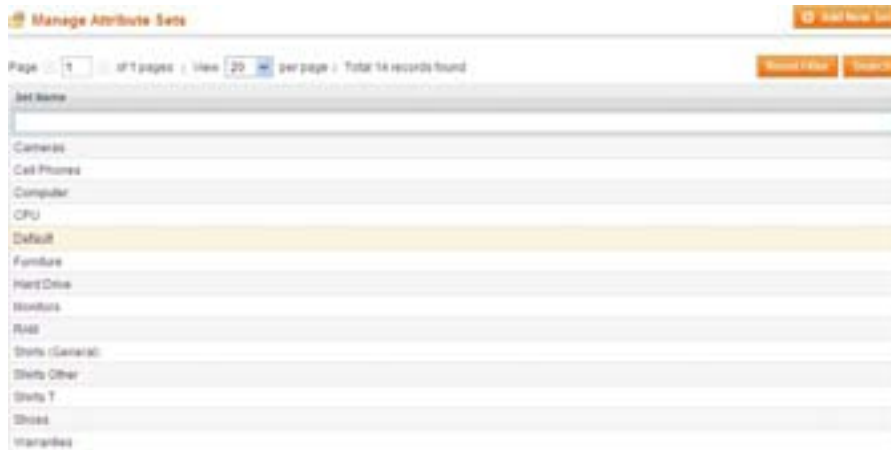


Figure 89. Manage Attribute Sets Page

Note: Figure 89 shows the attribute sets that are provided in Magento's Sample Data.

Note: The Default attribute set is composed mostly of system attributes. This attribute set is typically inherited by all other attribute sets.

2. Click the Add New Set button to display the Add New Attribute Set page (Figure 90).



Figure 90. Add New Attribute Set Page

3. In the Name field, specify the name of this attribute set. This name is used only in the backend.

4. In the Based On field, select another attribute set from which this attribute set is to inherit.

This enables you to reuse the attributes that are already defined in a set to build other attribute sets. The simple option is to leave the Default option that appears in this field.

Click Save Attribute Set to display the Edit Attribute Set page (Figure 91).



Figure 91. Edit Attribute Set

Note: System attributes are indicated by an icon with an orange dot.

The top left of the page shows the name of the attribute set that you are defining.

The center of the page shows a hierarchical tree representing groups of attributes.

An attribute group is a logical grouping of attributes within an attribute set. See “Creating a New Attribute Group,” page 94, for a description of how to define attribute groups.

The right side of the page shows a list of attributes defined in other attribute sets and not assigned to this attribute set.

5. Assign attributes to this attribute set by dragging them from the Unassigned Attributes area on the right into a group in the tree in the Groups area.

Creating a New Attribute Group

The center of the Edit Attribute Set page shows a hierarchical tree representing groups of attributes.

Attribute groups can be thought of as folders that contain attributes. Each group corresponds to a different tab on the product page in the backend. Magento CE comes with six attribute groups by default: General, Prices, Meta Information, Images, Recurring Profiles, Design, and Gift Options. They contain the various system attributes. System attributes cannot be removed from an attribute set; however, they can be moved to other attribute groups. Therefore, you can remove an attribute group as long as there are no system attributes within it. The order of both the attribute groups and the attributes can be changed by selecting and dragging them. This affects the order of tabs and attributes on the product page in the backend, respectively. You can also create a new attribute group, to which you can move system attributes, or associate simple attributes.

Groups

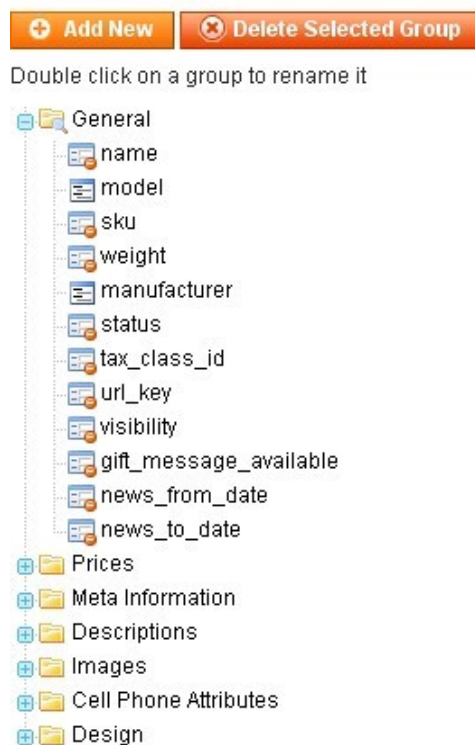


Figure 92. Attribute Groups

To create a new attribute group:

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

Managing Products

This section describes how to define and edit products.

Tip: You should first define attributes and an attribute set, as described in “Managing Product Attributes,” page 88, before you define products that have those attributes.

Product Types

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

- ❖ Simple Product: This is the most basic product type. It is suitable for all kinds of physical (shipped) products.
- ❖ Grouped: This option enables you to display several similar products on a single page. For example, if you are selling chefs’ knives and you have the same knife in four sizes, you can make a grouped product to display all four of these sizes. Customers can select the size(s) that they want and the quantity they need, and add them to the cart from this page.

Setting Up Your Catalog

- ❖ **Configurable:** This product type enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKU) and then add these six to a configurable product where customers can choose the size and color, and then add it to their cart. A very similar functionality is possible by using Custom Options for Simple products. The difference between a configurable product and a product including custom options is that inventory is not checked or updated for individual options during the purchase of the latter and there is no possibility to go directly to a product with a given set of options. This also makes it hard for a search engine to find the product option.
- ❖ **Virtual Product:** This is a product that does not require shipping or inventory. It is generally used for warranties or services.
- ❖ **Downloadable Product:** This is a digitally downloadable product that sells one or more files of a product and provides samples of those files. These downloadable files can reside on your server or be provided as URLs to any other server.
- ❖ **Bundle:** This product is composed of components that are presented in different ways and are made from existing products. A good example of a bundle is a complete computer. For this computer, you can configure how much RAM or what kind of monitor is included with this computer in your store.

Creating a New Product

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

To create a new product:

1. In the Admin Panel, select Catalog > Manage Products to display the Manage Products page, as shown in Figure 93.

Name	Type	Price	Status	Actions
100 HP TouchSmart	Simple Product	\$ 750.00	Enabled	View Product
101 HP i5 Computer	Simple Product	\$ 600.00	Enabled	View Product
102 Samsung Computer	Simple Product	\$ 600.00	Enabled	View Product
103 HP Computer	Simple Product	\$ 600.00	Enabled	View Product
104 Microsoft Windows 8.1	Simple Product	\$ 80.00	Enabled	View Product
105 Logitech Webcam	Simple Product	\$ 100.00	Enabled	View Product
106 Logitech Webcam	Simple Product	\$ 100.00	Enabled	View Product
107 Microsoft Windows 8.1	Simple Product	\$ 80.00	Enabled	View Product
108 HP i5 Computer	Simple Product	\$ 600.00	Enabled	View Product
109 HP i5 Computer	Simple Product	\$ 600.00	Enabled	View Product
110 HP i5 Computer	Simple Product	\$ 600.00	Enabled	View Product

Figure 93. Manage Products Page

Note: Figure 93 shows the products defined in the Sample Data provided with Magento. If you downloaded Sample Data, as described in the Step 2: Downloading Sample Data section on page 11, then you may want to leave the products in for you to refer to as examples and delete them later.

- 2 Click Add Product on the top right of the page to display the New Product page (Figure 94).

Figure 94. New Product Page

Product Wizard, First Page

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

1. In the Attribute Set field, select the attribute set that contains the attributes that best describe this product. See “Managing Product Attributes,” page 88, for a description of how to define attributes.

- 2 In the Product Type field, choose the type of product you want to create.
- 3 Click Continue to display the General tab, as shown in Figure 95. (This tab may look different depending on the product type that you choose.).

The screenshot shows the 'New Product (Default)' form in the Magento admin interface. On the left is a sidebar with a 'Product Information' section containing a list of tabs: General, Price, Meta Information, Images, Description, Design, Receiving Profile, Gift Options, Inventory, Reviews, Categories, Related Products, Up-sells, Cross-sells, and Custom Options. The 'General' tab is selected. The main form area has a title bar with 'New Product (Default)' and buttons for 'Back', 'Cancel', 'Save', and 'Save and Continue Edit'. Below the title bar is a 'Continue New Introduction' button. The form fields include: 'Name *' (text), 'SKU *' (text), 'Weight *' (text), 'Status *' (dropdown with '-- Please Select --'), 'Tax Class *' (dropdown with '-- Please Select --'), 'URL Key' (text), 'Visibility *' (dropdown with 'Catalog Search'), 'Manufacturer' (text), 'Enter' (text), 'Set Product as New from Date' (calendar icon), 'Set Product as New to Date' (calendar icon), 'Country of Manufacture' (dropdown), and 'In Stock' (dropdown with 'No'). Each field has a small icon indicating its type or a mandatory status.

Figure 95. General Tab

General Tab

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

- ❖ Name: The product name as it appears in the frontend.
- ❖ SKU: The product's store keeping unit (SKU). Magento CE uses SKU as a unique identifier for this product. SKU is global, meaning if you update the SKU for a product in one web store, it updates in all other web stores as well.
- ❖ Weight: The product's weight. This value is usually used for shipping calculations. Specify only the number. Shipping service providers will interpret it according to the measurement units they use.
- ❖ Status: Select Enabled to make this product available on the frontend.
- ❖ Tax Class: The tax class of the product. See "Product Tax Class," page 132, for more information.

- ❖ **Visibility:** Determines whether the product is displayed in the catalog pages and/or search results. The following options are available:
 - **Not Visible Individually** - The product will not be displayed individually in the frontend; however, it can be a component of a composite, configurable, bundle, or grouped product.
 - **Catalog** - The product will be displayed on pages of categories it is associated to, but it will not appear in search results.
 - **Search** - The product will be displayed when your customers search for it either using the quick or Advanced Search tools, but will not be displayed on the related category page.
 - **Catalog, Search** - The product will be available on category view pages to which it is associated and on the search result page.

The following describes the other fields in this page:

- ❖ **URL key:** The search engine-friendly URL identifier is the name used for this product in the product's URL. You cannot use spaces in this field. If the URL key is left blank, one is automatically generated by Magento CE.
- ❖ **Manufacturer:** Select the name of the manufacturer from the drop-down list.
- ❖ **Color:** Select the color of the product, if applicable.
- ❖ **Set Product as New from/to Date:** The date range in which this product can be promoted as a new product in various locations throughout your site.
- ❖ **Country of Manufacture:** Select the country in which the product was manufactured.
- ❖ **In feed:** Determines whether this product is included in your store's product RSS feed.

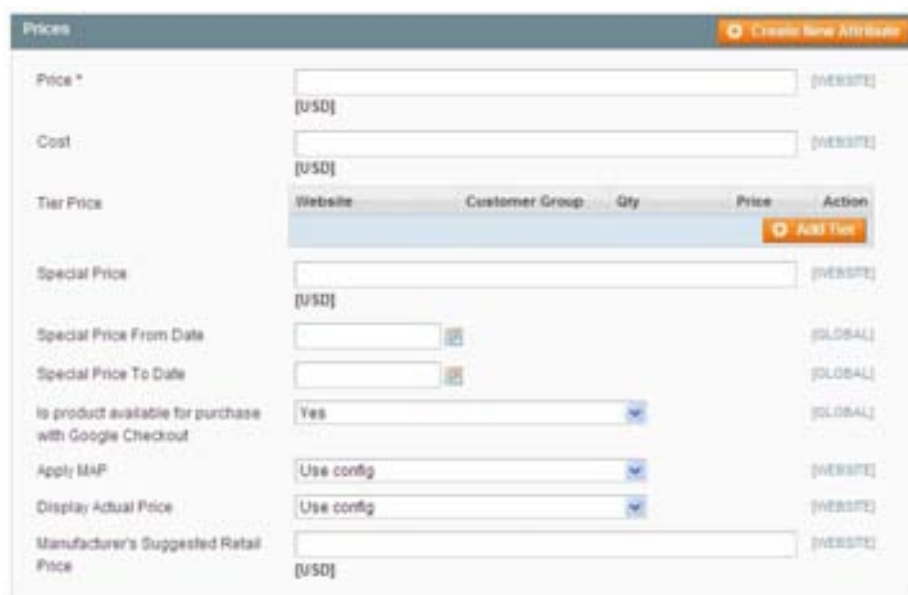
Setting Up Your Catalog

Note: Additional fields may appear on this (and other pages) if you add attributes to the Default attribute set or base the product on another attribute set.

Note: The Create New Attribute button opens a popup window that enables you to enter an attribute to be added to the selected attribute set. However, we recommend defining the attributes structure first.

Prices Tab

Click the Prices tab in the Product Information panel on the left to display the Prices tab, as shown in Figure 96.



The screenshot shows the 'Prices' tab interface. At the top right is a button labeled 'Create New Attribute'. The form contains several input fields and a table:

- Price ***: Input field with a red asterisk, followed by a currency selector set to '[USD]' and a '[WEBSITE]' scope indicator.
- Cost**: Input field with a currency selector set to '[USD]' and a '[WEBSITE]' scope indicator.
- Tier Price**: A table with columns: Website, Customer Group, Qty, Price, and Action. An 'Add Tier' button is located to the right of the table.
- Special Price**: Input field with a currency selector set to '[USD]' and a '[WEBSITE]' scope indicator.
- Special Price From Date**: Date input field with a '[GLOBAL]' scope indicator.
- Special Price To Date**: Date input field with a '[GLOBAL]' scope indicator.
- Is product available for purchase with Google Checkout**: Dropdown menu set to 'Yes' with a '[GLOBAL]' scope indicator.
- Apply MAP**: Dropdown menu set to 'Use config' with a '[WEBSITE]' scope indicator.
- Display Actual Price**: Dropdown menu set to 'Use config' with a '[WEBSITE]' scope indicator.
- Manufacturer's Suggested Retail Price**: Input field with a currency selector set to '[USD]' and a '[WEBSITE]' scope indicator.

Figure 96. Prices Tab

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

This tab enables you to enter the Price, Cost and Special Price information for this product. You can also add Tier Pricing, as described in “Tier Pricing,” page 208.

- ❖ The Special Price field is used for discounting or promotions, as described in “Special Prices,” page 206.

- ❖ The Cost field is only used in the backend. It can be used for generating margin and profit reports.
- ❖ The Apply Map, Display Actual Price, and Manufacturer's Suggested Retail Price fields are used for implementing the Minimum Advertised Price feature for this product. For more information, see "Minimum Advertised Price," page 209.

Meta Information Tab

Click Meta Info on the left to display the Meta Information tab, as shown in Figure 97.

Figure 97. Meta Information Tab

4. Specify information that enables search engines to more easily find and index this product.

Images Tab

Customers generally like to see what they are buying before they make a purchase.

The Images tab enables you to upload pictures of your product.

1. Click the Images tab on the left to display the Images tab, as shown in Figure 98.



Figure 98. Images Tab

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

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

- 3 After you have specified the image files of this product, click the Upload Files button. The Images tab shows uploaded the image files, as shown in Figure 99.

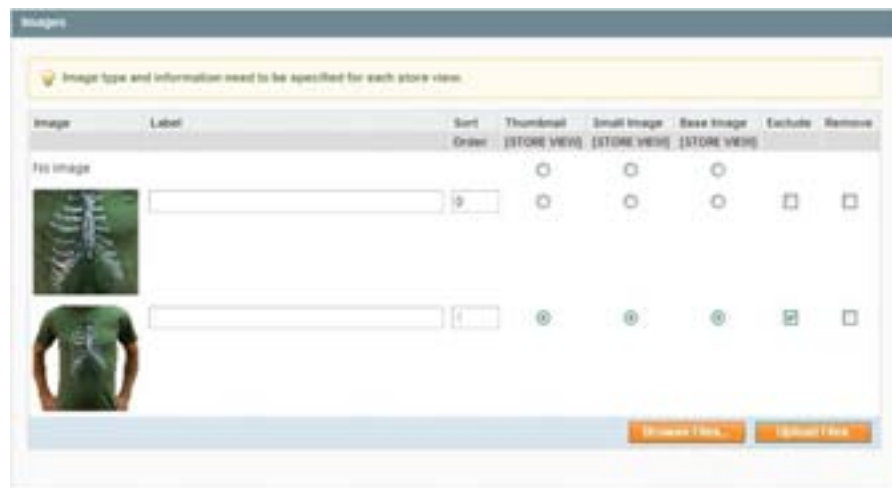


Figure 99. Images Tab with Images Uploaded

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

- ❖ Remove: Deletes the image from the collection; if the Remove check box is selected, the image will be removed after you save the product

Description Tab

Click Description on the left to open the Description tab, which enables you to create descriptions for the product (see Figure 100).

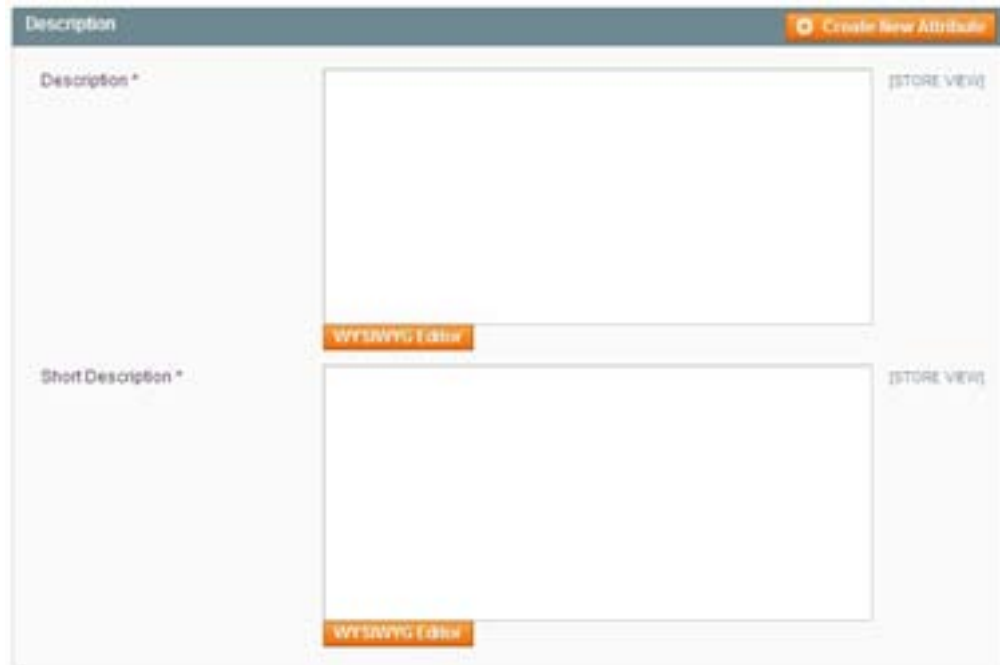
The screenshot shows a web interface for editing a product's description. At the top, there's a header bar with the word "Description" on the left and a button labeled "Create New Attribute" on the right. Below the header, the main area is divided into two sections. The top section is labeled "Description *" and contains a large, empty rectangular box for text entry. To the right of this box is a small button labeled "[STORE VIEW]". Below the top section is another section labeled "Short Description *", which also contains a large, empty rectangular box for text entry. To the right of this box is another small button labeled "[STORE VIEW]". Between the two text boxes, there are two orange buttons, each labeled "WYSIWYG Editor", one for each text area.

Figure 100. Description Tab

Both of the fields on this tab are mandatory. For both fields, you can use the WYSIWYG editor to format your descriptions.

- ❖ Description: The information that you enter in the Description field is shown in the product's page under the title Product Description.
- ❖ Short Description: The information that you enter in the Short Description field appears on the product's page under the title Quick Overview. This information is also shown when products are displayed in a list.

Design Tab

The Design tab contains additional settings to control the appearance of this product's product page, as shown in Figure 101.

The screenshot shows the 'Design' tab in a Magento product configuration interface. It features a sidebar on the left with the following options: 'Custom Design', 'Active From', 'Active To', 'Custom Layout Update', 'Page Layout', and 'Display product options in'. The main content area contains the following settings:

- Custom Design:** A dropdown menu currently showing '- Please Select -'.
- Active From:** A date selection field.
- Active To:** A date selection field.
- Custom Layout Update:** A large, empty text area for XML code.
- Page Layout:** A dropdown menu showing 'No layout updates'.
- Display product options in:** A dropdown menu showing 'Block after info Column'.

On the right side of the form, there are six links, each labeled '[STORE VIEW]'. In the top right corner of the tab, there is a button labeled 'Create New Attribute'.

Figure 101. Design Tab

All of these settings are optional. For more information about custom designs and page layouts, see “Design and Content,” page 169.

1. Select a custom design from the Custom Design drop-down list. Magento CE comes with several custom designs already defined, and you can modify these custom designs or create your own.
2. For the Active From and Active To fields, select the start and end dates for this custom design to be applied to this product. If you do not select a start date, the custom design is applied immediately. If you do not select an end date, the custom design is applied to this product until you manually deactivate it.
3. The Custom Layout Update is essentially a static block, with a few differences. Rather than HTML, the structure must be in XML format. The Update will appear at the bottom of the page, below the products, whereas a static block will appear above the products (if the static block is set to display with products). The Custom Layout Update will appear on the page only during the dates specified in the Active date range.

4. For Page Layout, select a layout from the drop-down list.
 - ❖ No layout updates: Uses the default settings that come with the Magento CE installation
 - ❖ Empty: Displays the category page without any objects, except for the content (products or static blocks only), category name, and view options (number to display per page, view as grid or list, and sort be options)
 - ❖ 1 column: Displays the contents, category name and view options, as well as the header, footer, search field, and navigation bar
 - ❖ Column on the left: Adds the left column to the 1 column display, which by default includes the currency selection and layered navigation
 - ❖ Column on the right: Adds the right column to the 1 column display, which by default includes the shopping cart view, wishlist, compared products list, polls, and newsletter sign-up
 - ❖ 3 columns: Displays both the left and the right columns
5. For Display Product Options In, select a location for the product options to appear in the layout.

Recurring Profile Tab

By default, the Recurring Profile tab only appears for simple and virtual products. However you can configure it to become available for other product types, by changing the Apply To option of the Enable Recurring Profile attribute. A recurring profile enables you to set and configure recurring payments on a product. These are most often used for subscriptions or products with installment payment plans. When a product like this is purchased from your store, the customer is redirected to a third-party payment system where a “recurring payment agreement” with the store is authorized by the customer.

Currently, creating recurring profiles is available only for the PayPal Express Checkout payment method.

To enable a recurring profile for this product, select Yes for Enable Recurring Profile. Additional options become visible, as shown in Figure 102.

Recurring Profile Create New Attribute

Enable Recurring Profile ☒ Yes (20,004)
 * Products with recurring profile participate in catalog as normal items

Recurring Payment Profile (20,004)

Schedule

Customer Can Define Start Date: No (20,004)
 Schedule Description:
 * Short description of the recurring payment. By default equals to the product name.

Maximum Payment Failures:
 * The number of scheduled payments that can fail before the profile is automatically suspended.

Auto Bill on Next Cycle: ☒ No (20,004)
 * Automatically bill the outstanding balance amount in the next billing cycle (if there were failed payments).

Billing

Billing Period Unit: -- Please Select -- (20,004)
 * Unit for billing during the subscription period.

Billing Frequency:
 * Number of billing periods that make up one billing cycle.

Maximum Billing Cycles:
 * The number of billing cycles for payment period.

Trial Period

Trial Billing Period Unit: -- Not Selected -- (20,004)
 Trial Billing Frequency:
 Maximum Trial Billing Cycles:
 Trial Billing Amount:

Initial Fees

Initial Fee:
 * Initial non-recurring payment amount due immediately upon profile creation.

Allow Initial Fee Failure: ☒ No (20,004)
 * Whether to suspend the payment profile if the initial fee fails or add it to the outstanding balance.

Figure 102. Recurring Profile Tab

Most of the options on this tab are self-explanatory. For additional details on how recurring profiles work, see the <http://www.magentocommerce.com/knowledgebase/entry/working-with-recurring-profiles/> article in the Magento Knowledge Base.

Note: Creating a recurring profile for a product does not create subsequent orders in the Magento Admin Panel.

Gift Options Tab

The Gift Options tab contains one option. The Allow Gift Message option determines whether customers are able to add a gift message to this particular product during checkout.

The default value of this setting is controlled by a Sales configuration setting (System > Configuration > Sales > Gift Options). To change this option, clear the Use Config Settings check box.

Inventory Tab

The Inventory tab enables you to control various aspects of inventory management for this product.

Many of the settings on this tab are controlled by the Inventory configuration settings (System > Configuration > Inventory). To override these configuration settings for this product, clear the appropriate Use Config Settings check box.

1. Select the Inventory option in the left panel to display the Inventory tab, as shown in Figure 103.

Setting	Value	Use Config Settings	Link
Manage Stock	Yes	<input checked="" type="checkbox"/>	[GLOBAL]
Qty*	0	<input checked="" type="checkbox"/>	[GLOBAL]
Qty for Item's Status to become Out of Stock	0	<input checked="" type="checkbox"/>	[GLOBAL]
Minimum Qty Allowed in Shopping Cart	1	<input checked="" type="checkbox"/>	[GLOBAL]
Maximum Qty Allowed in Shopping Cart	10000	<input checked="" type="checkbox"/>	[GLOBAL]
Qty Uses Decimals	No	<input checked="" type="checkbox"/>	[GLOBAL]
Backorders	No Backorders	<input checked="" type="checkbox"/>	[GLOBAL]
Notify for Quantity Below	1	<input checked="" type="checkbox"/>	[GLOBAL]
Enable Qty Increments	No	<input checked="" type="checkbox"/>	[GLOBAL]
Stock Availability	Out of Stock	<input checked="" type="checkbox"/>	[GLOBAL]

Figure 103. Inventory Tab

Setting Up Your Catalog

- 2 In the Manage Stock field, select Yes to specify that all inventory options are available for this single product, or select No to specify that you do not want to manage product inventory (in this case, the product is permanently available in the store to your customers).
- 3 In the Qty field, specify how many items of this product you have in stock.
- 4 In the Qty for Item's Status to become Out of Stock field specifies that if stock quantity falls below this level, then the product becomes Out of Stock.
- 5 The Minimum / Maximum Qty Allowed in Shopping Cart fields enable you to limit availability to products that have great prices to retailers, so that they are not sold to wholesale customers.
- 6 In the Qty Uses Decimals field, select Yes to specify that customers can enter decimal quantities for this product, as opposed to integers. This is suitable for a product sold by the weight, volume or length. For example: 2.35 pounds of concrete or 3.75 feet of carpeting.
- 7 The Backorders field enables your customers to place an order for a product that has an in-stock quantity of less than 0. This option also enables you to notify your customers that even though there are no items of a product currently available, they can still place an order. You can do this by selecting the Allow Qty Below 0 option and the Notify Customer option. You can also enable this option without notifying customers by only selecting the Allow Qty below 0 option.
- 8 The Enable Qty Increments field enables you to choose whether this product is sold in quantities other than 1 (for example wine that is sold in multiples of 6 bottles). If you select Yes for this option, the Qty Increments field becomes visible, enabling you to specify the quantity increment for this product.
- 9 In the Stock Availability field, select the In Stock option if this product is in stock, or select Out of Stock otherwise.

Websites Tab

The Websites tab enables you to choose which websites, stores, and store views this product is available on. Use the check boxes to make your selections. To set up websites, stores, and store views, see “Setting Up Your Store Hierarchy,” page 127.

1. Select the Websites option in the left panel to display the Websites tab, as shown in Figure 104.



Figure 104. Websites Tab

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

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

Categories Tab

The Categories tab enables you to assign this product to one or more categories.

1. Select the Categories option in the left panel to display the Categories tab, as shown in Figure 105.



Figure 105. Categories Tab

- 2 Specify the categories to which this product belongs by selecting the appropriate check boxes.

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

Note: You can also assign products to a category while editing the category.

Related Products, Cross-Sell, and Up-Sell Tabs

Each of these pages is similar and enables you to configure relationships between products. The interface in Figure 106 appears in each of these pages:



Figure 106. Product Relationship Interface

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

For more information about these pages, see “Promotions,” page 189.

Product Alerts Tab

This page is only available when alerts are enabled (System > Configuration > Catalog).

Product Alerts

Price alert subscription was saved successfully

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

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

Stock notification was saved successfully

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

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

Figure 107. Product Alerts Tab

This page displays a list of the customers that have subscribed to each type of alert for this product, and the dates on which they were notified about changes.

Product Reviews Tab

This tab provides a list of reviews posted by customers about a product that is being edited (the tab is not available for new product records for which there are no reviews). You can use the Edit button that appears in each review row to approve, edit or remove the review.

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

Page 1 of 1 pages | View 20 per page | Total 2 records found | [Pending Reviews RSS](#) [Reset Filter](#) [Search](#)

ID	Created On	Status	Title	Nickname	Review	Visible In	Type	Product Name	Product SKI	Action
74	Aug 31, 2007 7:21:33 PM	Approved	Amazing	Me	What a cool shirt, I wear it everyday	Main Website Main Store - German Main Website Main Store - French	Guest	Coolerco: Functioning On Impulse T-Shirt	cool_1	Edit
63	Aug 29, 2007 8:07:46 AM	Approved	Comfortable!	Essent	This is the most comfortable shirt I own. I...	Main Website Main Store - English Main Website Main Store - French	Customer	Coolerco: Functioning On Impulse T-Shirt	cool_1	Edit

Figure 108. Product Reviews Tab

Product Tags Tab

This tab displays the tags that customers have assigned to a product, and how many times each tag was used. This tab is not available in new product records for which no tags have been assigned.

Tag Name	# of Uses	Status
	From: <input type="text"/>	To: <input type="text"/>
	Set: <input type="text"/>	<input type="button" value="OK"/>
blue	1	Approved
bones	4	Approved
cool t-shirt	1	Approved
emo	1	Approved
Del	1	Approved
good	1	Approved
green	3	Approved
hip	3	Approved
Huhuhu	2	Approved
Hupe	1	Approved
mal	1	Approved
	1	Approved

Figure 109. Product Tags Tab

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

Customers Tagged Product Tab

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

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

Figure 110. Customers Tagged Product Tab

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

Custom Group Configuration Pages

Additional configuration pages may appear depending upon the groups that you have created using the Attribute Sets tool. See “Creating Attribute Sets,” page 92, for more information about attribute sets. An example custom group T-Shirts attribute is shown in Figure 111.

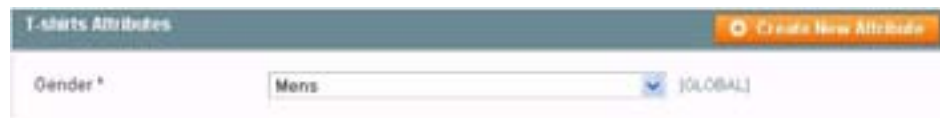


Figure 111. Custom Attribute

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

Custom Options Tab

This page enables you to easily create product variants or products that can accept customer input, such as custom imprints or gifts. See “Creating Variations of a Product,” page 121, for more information on this topic.

Product Type Dependent Configuration Pages

Depending upon the product type, additional configuration tabs may be available.

The following provides a quick review of these types of pages.

Downloadable Products: Downloadable Information Tab

The Downloadable Information tab enables you to specify options for a downloadable product.

Figure 112. Downloadable Information Tab

This page contains two sections:

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

- Selecting the URL option, specifying the link to a file that is already on a server in a different location, and clicking the Upload Files button.

Samples that you put in the Samples section appear in the store as shown in Figure 113.

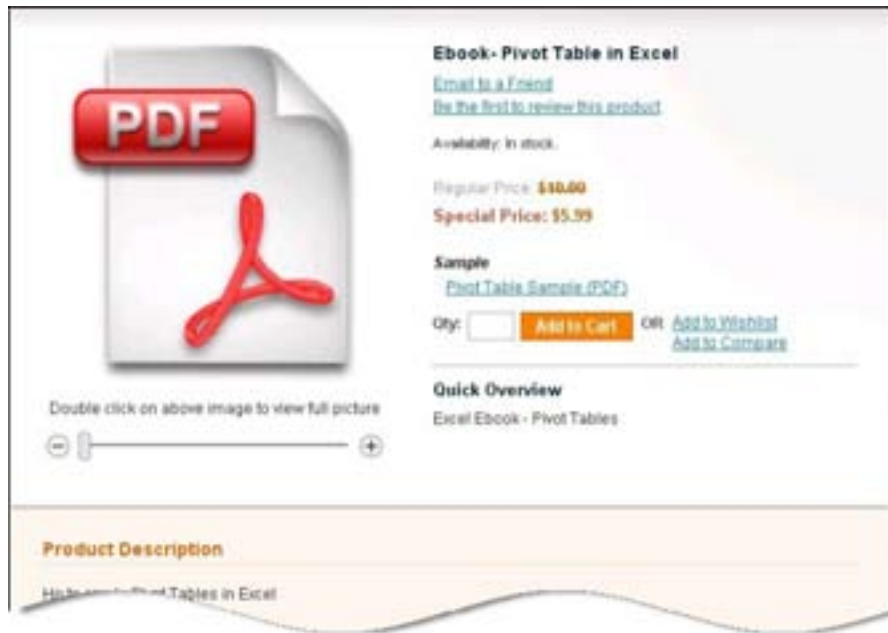


Figure 113. Downloadable Product Sample

- ❖ The Links section contains the actual products that can be purchased, along with possible samples for them.
- The Links can be purchased separately option controls whether each of the downloadable products can be purchased by itself or not. This feature enables, for example, the tracks of a music CD product to be purchased separately. If you set this option to Yes, then you must input the price for each of the downloadable items.
- Each of the items also has two options controlling its behavior. The Max. Downloads option controls how many times after purchase a product can be downloaded by the customer. The Shareable option controls whether after each purchase of the product, the downloadable item is available for download without logging in, or if it requires

Setting Up Your Catalog

logging in. If the Shareable option is set to Yes, then customers can click links in the Order Confirmation email that they receive in order to get the product. However, this setting also enables anyone who gets this link to download the product. Setting this option to Yes is the only way to enable Guests to check out (or to enable a comparable quick checkout method, such as PayPal Express or Google Checkout) to download the product. There are configuration settings that must be selected to match your store.

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

Figure 114 shows a product in a store with three links and samples for each of them, for which the setting Links can be purchased separately was set to Yes.

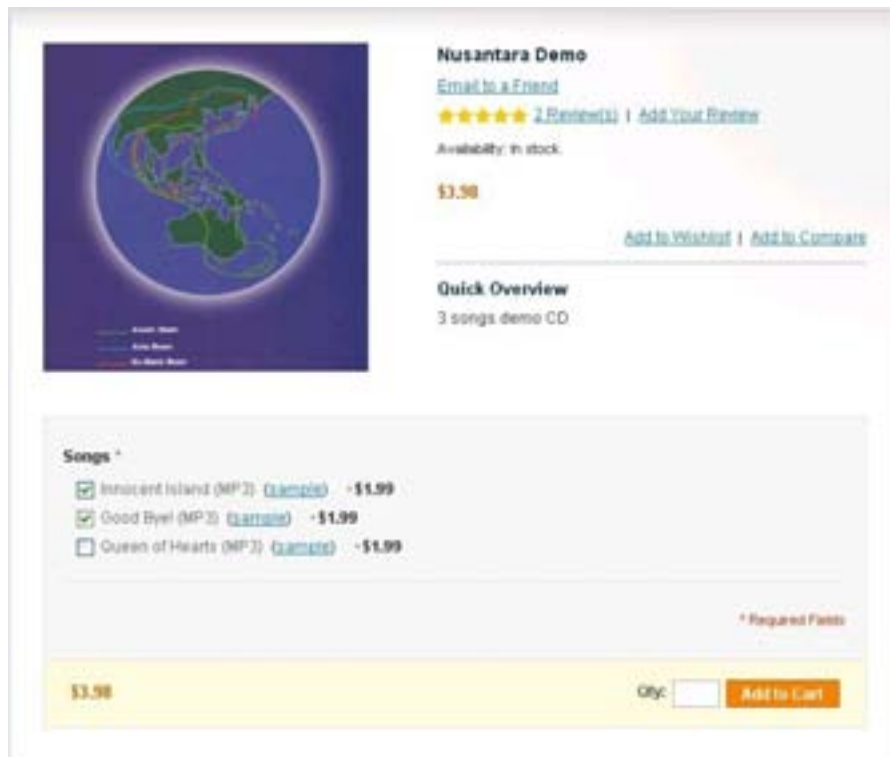
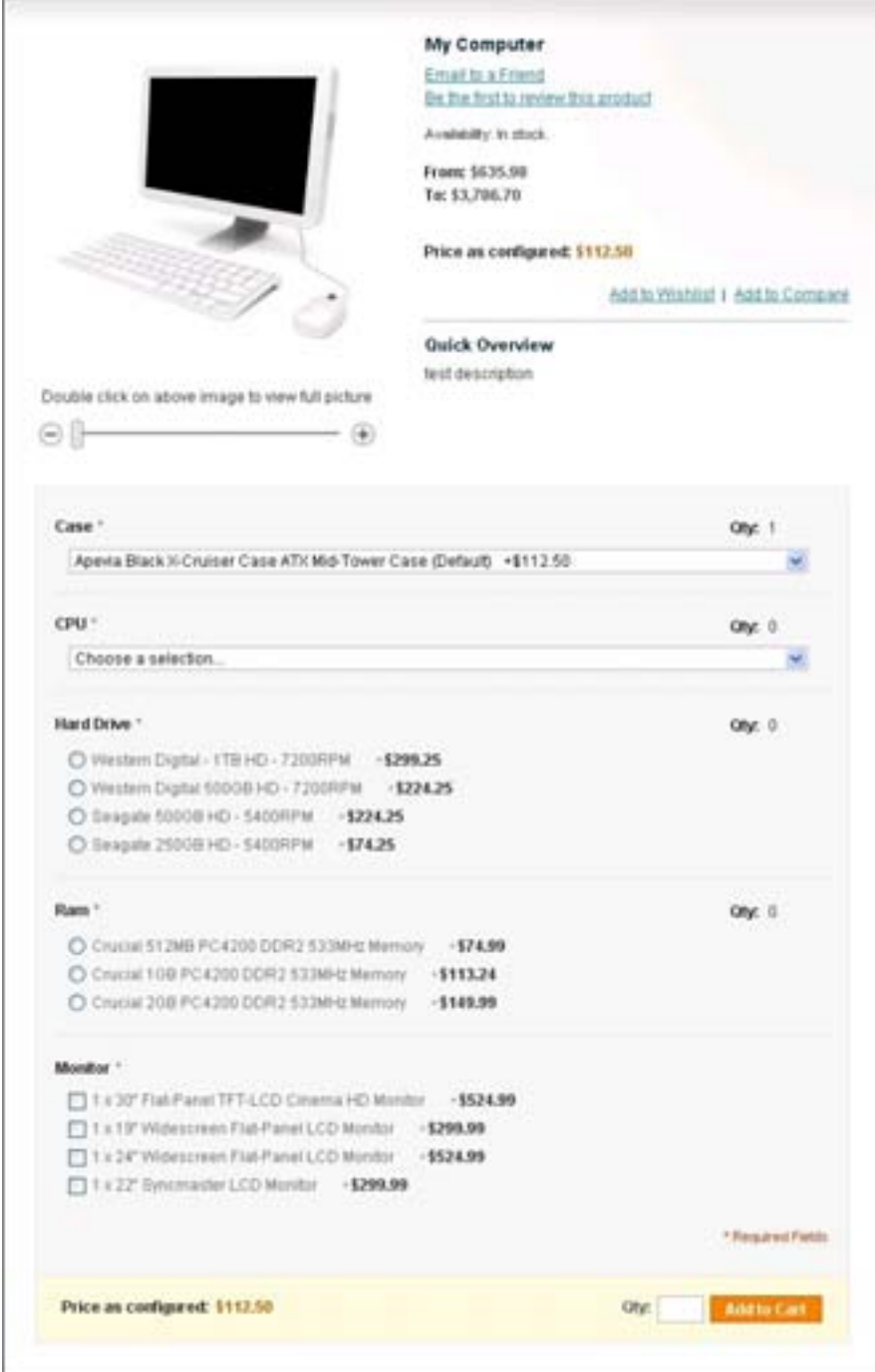


Figure 114. Downloadable Product Links and Samples

Bundle Product: Bundle Items Tab

An example of a bundled product is the Build Your Own Computer offering found in the demo store, as shown in Figure 115.



My Computer
[Email to a Friend](#)
[Be the first to review this product](#)
 Availability: In stock
 From: \$635.98
 To: \$3,796.70
 Price as configured: **\$112.50**
[Add to Wishlist](#) | [Add to Compare](#)

Double click on above image to view full picture

Quick Overview
 test description

Case * Qty: 1
 Apevia Black X-Cruiser Case ATX Mid-Tower Case (Default) +\$112.50

CPU * Qty: 0
 Choose a selection...

Hard Drive * Qty: 0
☐ Western Digital - 1TB HD - 7200RPM - \$299.25
☐ Western Digital 6000B HD - 7200RPM - \$224.25
☐ Seagate 6000B HD - 5400RPM - \$224.25
☐ Seagate 2500B HD - 5400RPM - \$74.25

Ram * Qty: 0
☐ Crucial 512MB PC4200 DDR2 533MHz Memory - \$74.99
☐ Crucial 1GB PC4200 DDR2 533MHz Memory - \$113.24
☐ Crucial 2GB PC4200 DDR2 533MHz Memory - \$149.99

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

* Required Fields

Price as configured: **\$112.50** Qty: [Add to Cart](#)

Figure 115. Bundle Product

Setting Up Your Catalog

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

- ❖ **SKU Fixed or Dynamic (General tab)**: Specifies whether the entire product is assigned an SKU based on its components, or is the SKU fixed for the bundle.
- ❖ **Weight Fixed or Dynamic (General tab)**: Specifies whether the entire product's weight is based on the weight of its individual components, or is the weight fixed for the entire bundle.
- ❖ **Price Fixed or Dynamic (Price tab)**: Specifies whether the price of the product is based on the price of its individual component, or is the price fixed for the entire bundle.
- ❖ **Price View (Price tab)**: Specifies whether the product's price is shown as a range, from the least expensive component to the most expensive (Price Range), or is only the least expensive shown (As Low As).

The Bundle Items tab contains the following settings:

- ❖ **Ship Bundle Items**: Specifies whether individual components are shipped separately or whether the entire product is shipped.
- ❖ **Bundle Items**: Bundled Items appear in the store as a list of available options. You can add a new option using the Add New Option button. For each option you can configure its title, input type (single and multiple selection fields are available), whether the field is mandatory (for example: it can be True for a computer processor and False for an additional battery of a laptop computer), and its position on the page.

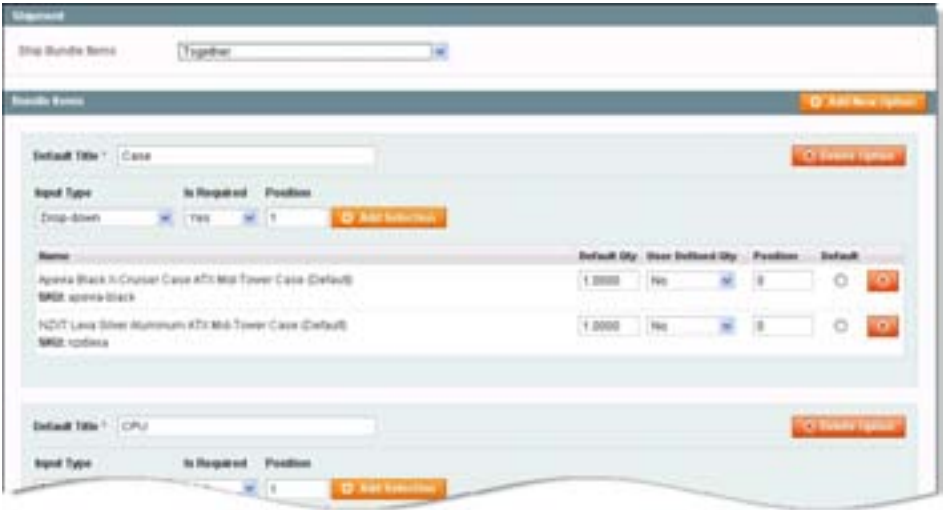


Figure 116. Bundle Items Tab

After you add options, you can specify individual values for each option. Click the Add Selection button to open a selection area, as shown in Figure 117.

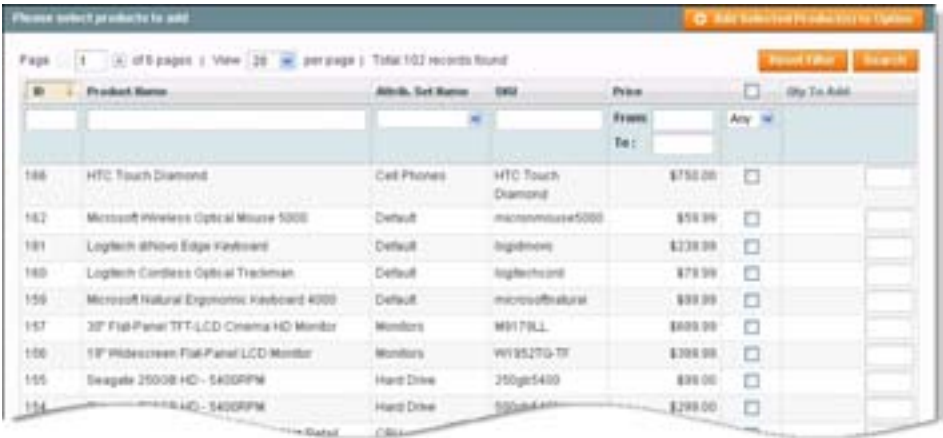


Figure 117. Adding Products to a Bundle

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

- ❖ Default Qty: Specifies the default quantity shown in the product view page
- ❖ User Defined Qty: When set to Yes, this option enables customers to enter a quantity for a given selection

Setting Up Your Catalog

- ❖ Position: Specifies the Orders of a selection
- ❖ Default: Specifies the predefined value

Grouped Product: Associated Products Tab

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

In the store, a grouped product appears as shown in Figure 118.

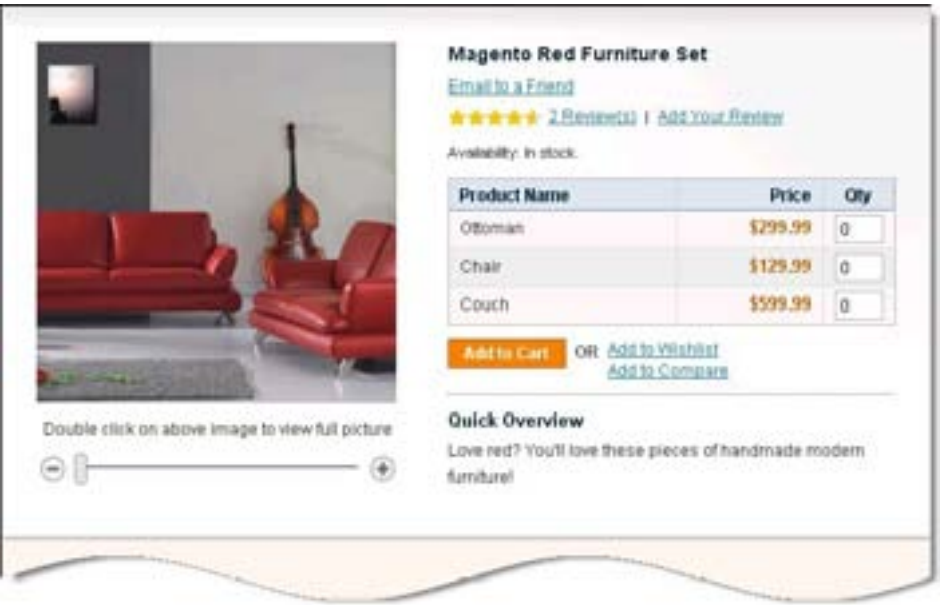


Figure 118. Grouped Product

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

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

Figure 119. Associated Products in a Grouped Product

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

Configurable Product: Associated Products Tab

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

The configurable product appears in the store with a section that provides customers with options, such as the Size option shown in Figure 120.



Figure 120. Configurable Product

Setting Up Your Catalog

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

Select Configurable Attributes

This section enables you to select the product attributes that can be configured. The only attributes that are available on this tab are those that have a scope of Global, an input type of Dropdown, and the Use to create configurable product option set to Yes.



Figure 121. Select Configurable Attributes

Use the check boxes to select one or more desired attribute, and then click Continue.

Create Simple Associated Product

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



Figure 122. Create Simple Associated Product

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

The Copy from Configurable button works in a very similar manner to the above, but it pre-fills many of the fields with information from the selected configurable product, as shown in Figure 123.

Quick simple product creation

Name * [STORE VIEW] ☒ Autogenerate

SKU * [GLOBAL] ☒ Autogenerate

Weight * [GLOBAL]

Status * [WEBOTE]

Visibility * [STORE VIEW]

Shirt Size *

Qty *

Stock Availability

Figure 123. Quick Simple Product Creation

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

Super Product Attributes Configuration

This section enables you to specify the attribute name that appears in the store for selection and the price for each of the options. Two price options are provided: Fixed or Percentage.

Super product attributes configuration

Price values for options should be specified in system base currency.
Attribute names can be specified per store.

Attribute Name	Option	Price	Fixed
Shirt Size	Option: Small	<input type="text"/>	<input checked="" type="checkbox"/>
	Option: Medium	<input type="text"/>	<input checked="" type="checkbox"/>
	Option: Large	<input type="text"/>	<input checked="" type="checkbox"/>

Setting Up Your Catalog

The price for configurable products is a combination of the price from the Prices tab, as described in “Prices Tab,” page 99, and the values entered in this area. This means that if the configurable product’s price is \$20 and the price for the Medium option is: Percentage and 10, then this variation of the product costs \$22. The price of the associated products is not used for calculation.

Page 1 of 1 pages | View 20 per page | Total 3 records found

[Filter](#) [Search](#)

<input checked="" type="checkbox"/>	ID	Name	Attrib. Set Name	SKU	Price	Inventory	Shirt Size	Actions
Yes				coal_	From: <input type="text"/> To: <input type="text"/>			
<input checked="" type="checkbox"/>	35	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_sm	\$15.00	In Stock	Small	Edit
<input checked="" type="checkbox"/>	117	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_md	\$15.00	In Stock	Medium	Edit
<input checked="" type="checkbox"/>	118	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_lg	\$15.00	In Stock	Large	Edit

Figure 124. Selecting Associated Products

Completing the Product Wizard

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

To edit an existing product:

1. From the Catalog menu, select the Manage Products option to display a list of products, as shown in Figure 125.

<input type="checkbox"/>	Product Name	Type	Attributes	Price	Actions
<input type="checkbox"/>	Apple iMac (15-inch Retina Display)	Simple Product	Apple iMac (15-inch Retina Display)	\$1,299.00	Edit Delete Duplicate
<input type="checkbox"/>	Canon EOS 70D DSLR Camera	Simple Product	Canon EOS 70D DSLR Camera	\$1,199.00	Edit Delete Duplicate
<input type="checkbox"/>	HP Pavilion 15.6-inch Laptop	Simple Product	HP Pavilion 15.6-inch Laptop	\$599.00	Edit Delete Duplicate
<input type="checkbox"/>	Lenovo ThinkPad X1 Carbon	Simple Product	Lenovo ThinkPad X1 Carbon	\$1,299.00	Edit Delete Duplicate
<input type="checkbox"/>	Microsoft Surface Pro 4	Simple Product	Microsoft Surface Pro 4	\$1,299.00	Edit Delete Duplicate
<input type="checkbox"/>	Samsung Galaxy S6 Edge	Simple Product	Samsung Galaxy S6 Edge	\$699.00	Edit Delete Duplicate
<input type="checkbox"/>	Apple Watch Series 1	Simple Product	Apple Watch Series 1	\$349.00	Edit Delete Duplicate
<input type="checkbox"/>	Amazon Echo	Simple Product	Amazon Echo	\$99.00	Edit Delete Duplicate
<input type="checkbox"/>	Google Home	Simple Product	Google Home	\$129.00	Edit Delete Duplicate

Figure 125. Product List

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

Mass-Changing Products

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

- ❖ **Delete:** Deletes the selected products from the store.
- ❖ **Change Status:** Disables or enables multiple products at once.
- ❖ **Update Attributes:** Updates the attributes of multiple products. When you click the Submit button, a new page opens containing a list of all attributes for all selected products. Select the Change check box for any attribute that you want to change, then specify the new attribute values. Click Save to confirm the changes.

Note: You can use the Duplicate Product feature to create separate products without having to enter every value each time. To use it, click the Duplicate button on the product page of an existing product.

Creating Variations of a Product

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

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

To create variations of a product:

1. From the Catalog menu, select the Manage Products option to display a list of products.
2. Click the Add Product button to create a new product or click the Edit link to the right of the relevant product to open the edit page.
3. Select the Custom Options tab.
4. Click the Add New Options button on the top right of this page to display the controls shown in Figure 126.

The image shows a web-based form titled "Custom Options". At the top right of the form area is an orange button labeled "Add New Options". Below this, there are four main input fields: "Title" (a text box), "Input Type" (a dropdown menu), "Is Required" (a checkbox), and "Sort Order" (a text box). The "Input Type" dropdown menu is currently open, displaying a list of options: "Text", "Field", "Area", "Select", "Drop-down", "Radio Buttons", "Checkbox", and "Multiple Select". To the right of the "Is Required" checkbox is an orange button labeled "Cancel/Update".

Figure 126. Creating Custom Options

5. In the Title field, specify a name for this new property, such as the name Size.

- 6 In the Input Type field, select the type of input that can be given in this field, such as text or dropdown menu, as shown above.
- 7 In the Is Required field, select Yes to indicate that this is a mandatory field, meaning that a customer must select an option in this field in order to purchase this specific product.
- 8 If there is more than one option, then specify the order in which this option appears in the Sort Order field. A value of 1 indicates that it appears first.
- 9 Click the Add New Row button to display the row shown in Figure 127, in which you can define the new variation of this product. For example, the product in a certain size and its corresponding price.

The screenshot shows a 'Custom Options' form. At the top, there's a header bar with 'Custom Options' on the left and 'Add New Option' on the right. Below this is a table with columns: Title, Input Type, Is Required, and Sort Order. The first row has 'Size' in the Title field, 'Drop-down' in the Input Type field, 'Yes' in the Is Required field, and '1' in the Sort Order field. To the right of this table is a 'Delete Option' button. Below the first table is a second table with columns: Title, Price, Price Type, SKU, and Sort Order. The first row in this table has 'XL' in the Title field, '10' in the Price field, 'Fixed' in the Price Type field, 'short-sleeved' in the SKU field, and '1' in the Sort Order field. To the right of this table is an 'Add New Price' button.

Figure 127. Creating a Product Variation

- 10 In the Title field, specify the name of this variation of the product, such as Size XL.
- 11 All the prices in these rows are relative to the price of this product as defined in the Prices page of the product wizard described on page 99. In the Price Type field, select one of the following options:

Setting Up Your Catalog

- ❖ Fixed: To specify that the price of this variation of the product differs from the price of the base product by a fixed monetary amount, such as \$1.
- ❖ Percentage: To specify that the price of this variation of the product differs from the price of the base product by a percentage, such as 10%.

12. In the Price field, specify the difference between the price of this variation of the product and the price of the base product. Specify a fixed amount or a percentage according to the value that you entered in the Price Type field. You can also enter negative values.
13. In the SKU field, specify the SKU for this variation of the product.
14. If there is more than one variation, then specify the order in which this option appears in the Sort Order field. A value of 1 indicates that it appears first.
15. Click the Save button. This example product is shown in the web store, as shown in Figure 128



Figure 128. Product Variation in the Frontend

In this example, you can see that the price is \$13.50. However, if the Green color is selected, then the price is \$18.75, as shown in Figure 129.

Figure 129 Price Change for Product Variation

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

Remove	Product Name	Unit Price	Qty	Subtotal
	Addit The Rock And Roll Baseball: L/S, Cat T shirt Size: Small Color: Green	\$10.75	1	\$10.75

Importing and Exporting Product Data

Unless you have a small product catalog, the prospect of creating each product manually, one by one, is daunting. Magento CE has a solution: Import your product data from a comma-separated values (CSV) spreadsheet file. You can also export your product data to a CSV file.

Working with CSV Files

In order to import a CSV file into Magento CE, it must have certain characteristics. Specifically, each column heading must exactly match the Attribute Code for the attribute in that column.

Tip: To ensure that a CSV file's column headings are understood by Magento CE, first export a product CSV file (see "Exporting Product Data," page

126). You can then edit this file (by adding or updating rows) and then re-import it.

For the Category column, specify product category in textual form based on a category's path, with a slash (/) between each category level; for example, Furniture/Living Room. Do not include the Root Category in the path.

Importing Product Data

With the Import feature, you can upload a file that contains the records for as many products as you want.

The file that you upload must be in Comma-Separated Values (CSV) format. Most spreadsheet and database applications can read and create CSV files.

To import a product CSV file:

1. In the Admin Panel, select System > Import/Export > Import to open the Import page, as shown in Figure 130.



Figure 130. Import Page

2. Select Products from the Entity Type drop-down list.
3. Select one of the Import Behavior options from the drop-down list:

- ❖ Append Complex Data: Adds new or edited products to your store's database. Magento CE will not create duplicate entries for existing products and customers included in your CSV file.
 - ❖ Replace Existing Complex Data: Completely replaces your existing data or portions thereof.
 - ❖ Delete Entities: Completely deletes your existing database or portions thereof.
4. Click Browse and locate the CSV file in your local computer's file system.

Note The total size of the CSV file must not exceed the maximum size for your environment (typically 32 MB) and must be saved with UTF-8 encoding. Check your spreadsheet or database application documentation for information about saving a CSV file with UTF-8 encoding.

5. Click Check Data to validate the uploaded file.
6. If the uploaded file is valid, a "File is valid!" response appears. Import your products or customers by clicking Import. If your file contains errors, Magento CE notifies you of the errors and enables you to skip the erroneous rows and importing the valid products or customers by clicking Import.

When the import is complete, the "Import was successfully done" message appears.

Exporting Product Data

To export product information:

1. In the Admin Panel, select System > Import/Export > Export.
2. Select Products from the Entity Type drop-down list. The system generates a list of entity attributes that are relevant to your products.
3. By default, all attributes are exported to the CSV file. In the Entity Attributes list, select the Skip check box for any attributes that you want to exclude from the CSV file.

Setting Up Your Catalog

4. By default, all records are exported to the CSV file. Use the controls in the Filter column to limit the records that are exported.
5. Click Continue to export your selected product information to a CSV file.
6. Open the saved file in your favorite spreadsheet application and edit as needed.

9 Setting Up Your Store Hierarchy

If you have planned your store hierarchy (see “Store Hierarchy,” page 25) and set up the appropriate root categories (see “Creating Categories,” page 79), you are ready to set up your store hierarchy.

To set up your store hierarchy:

1. In the Admin Panel, select System > Manage Stores to open the Manage Stores page, as shown in Figure 131.



Figure 131. Manage Stores Page

- 2 To create a new website:
 - a. Click Create Website to open the New Website page.
 - b. In the Name field, specify a name for this website. Typically this will be the site's domain name (for example, somecompany.com).
 - c. In the Code field, specify a code name that the Apache Web server will use to point to the domain name (for example, somecompany_com).
 - d. (Optional) In the Sort Order field, specify an integer number to determine where this website is listed in scope-selection drop-down lists in the backend. A specification of 1 places this website at the top of the list, 2 places it second, and so on.
 - e. Click Save Website.
- 3 To create a new store:
 - a. From the Manage Stores page, click Create Store to open the New Store page.

- b. In the Website drop-down list, select the website that will be the parent of this store.
- c. In the Name field, specify a name for this store.
- d. In the Root category drop-down list, select the root category for this store. A root category can be assigned to more than one store, or to stores in different websites.
- e. Click Save Store.

4. To create a new store view:

- a. From the Manage Stores page, click Create Store View to open the New Store View page.

Setting Up Your Store Hierarchy

- b. In the Store drop-down list, select the store that is associated with this store view.
- c. In the Name field, specify a name for this store view, for example, French.
- d. In the Code field, specify a code for this store view, for example, somecompany.fr.
- e. In the Status drop-down list, select whether this store view is Enabled or Disabled.
- f. (Optional) In the Sort Order field, specify an integer number to determine where this store view is listed under its associated store in scope-selection drop-down lists in the backend. A specification of 1 places this website at the top of the list, 2 places it second, and so on.
- g. Click Save Store View.

Note: If you are associating a separate domain with each website, some modifications must be made to the web server configuration files. For details, see the following Magento Knowledge Base article:
<http://www.magentocommerce.com/knowledge-base/entry/tutorial-multi-sitemulti-domain-setup>

10 Taxes

Important: No guarantee is offered with respect to any of the information given here.
Please contact an expert before you take any decisions about tax matters.

Magento CE provides a variety of options for defining taxes that can be accessed by selecting the Sales menu and then the Tax option. Tax classes are used to define [“tax rules.”](#) Tax rules are defined as a combination of a Product Class, a Customer Class and a Tax Zone and Rate, as described below.

Each type of customer can be assigned a class when you define them, and each product is assigned a tax class. For a description of how to define a customer, see “Managing Customers,” page 224. For a description of how to define a product, see “Creating a New Product,” page 96.

Magento CE analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the shopping cart, and the region (as defined by the customer’s shipping address, billing address or shipping origin).

Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union. For more information, see “Appendix: VAT ID Validation,” page 279.

Note: When you set up tax options, be sure to set your store scope so that the options are applied across stores and websites appropriately.

Important: You can restrict access to tax settings in the Admin panel by setting permissions for users. You set permissions by creating roles. For more information, see “Limiting Administrator Access to the Admin Panel (Backend),” page 249.

Note that to access tax functionality you need to make sure that the Sales/Tax areas are checked along with the System/Tax areas. If you are setting up another website and you want to load catalog prices

including tax for a different region than your default shipping origin, you'll also need to allow access to the

System/Shipping settings for that role, because shipping origin determines what the assumed store tax rate is for catalog prices.

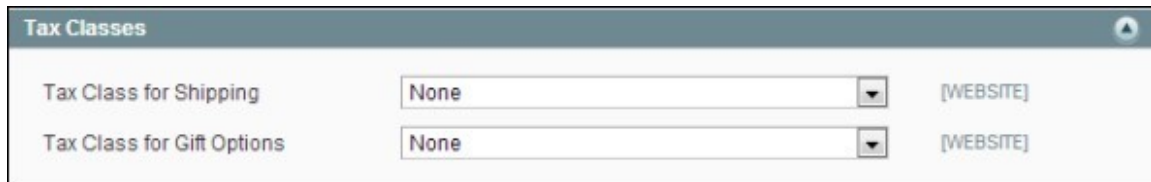
Tip: For more information about tax updates, including recommended tax configurations for different countries, see

<http://www.magentocommerce.com/knowledgebase/entry/magento-ce-18-ee-113-tax-calc.>

General Taxation Settings

To configure general taxation settings:

1. From the System menu, select the Configuration option.
2. From the SALES section in the panel on the left, select Tax.
3. Expand the Tax Classes section, as shown in Figure 132.



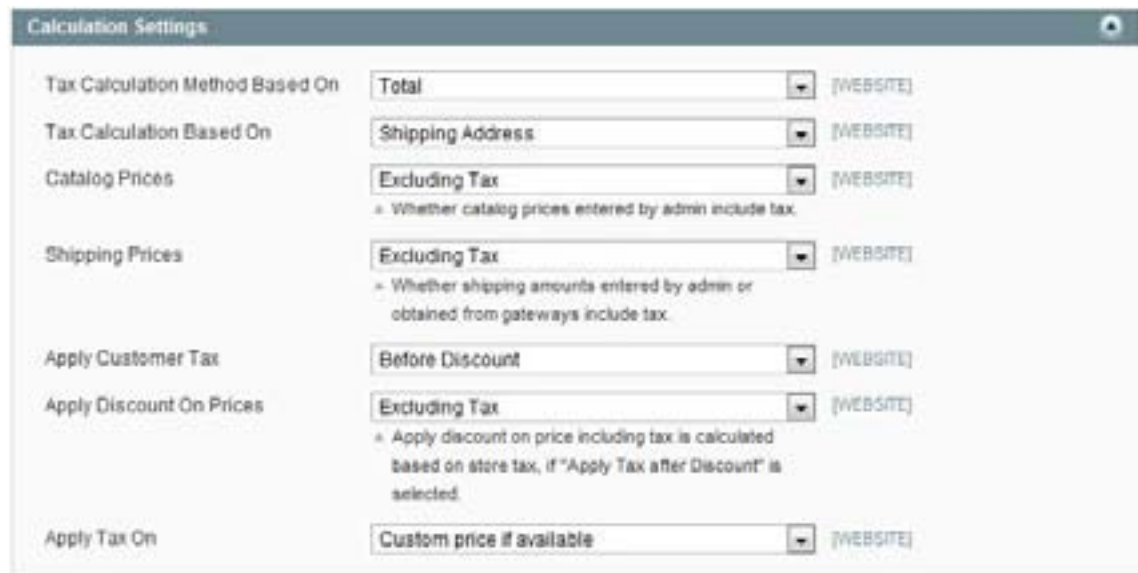
Tax Classes		
Tax Class for Shipping	None	[WEBSITE]
Tax Class for Gift Options	None	[WEBSITE]

Figure 132. Tax Class for Shipping and Gift Options

4. In the Tax Class for Shipping field, designate a product tax class for the shipping amount, or select None if your store does not charge an additional tax on shipping expenses.
5. In the Tax Class for Gift Options field, designate a product tax class for gift options, or select None if your store does not charge an additional tax on gift options.

Note: For more information about product tax classes and how to set them up, see “Product Tax Class,” page 132.

6. Expand the Calculation Settings section, as shown in Figure 133.



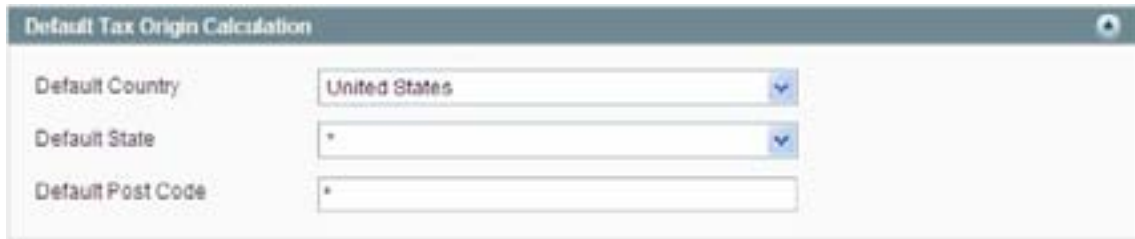
Calculation Settings		
Tax Calculation Method Based On	Total	[WEBSITE]
Tax Calculation Based On	Shipping Address	[WEBSITE]
Catalog Prices	Excluding Tax	[WEBSITE]
» Whether catalog prices entered by admin include tax.		
Shipping Prices	Excluding Tax	[WEBSITE]
» Whether shipping amounts entered by admin or obtained from gateways include tax.		
Apply Customer Tax	Before Discount	[WEBSITE]
Apply Discount On Prices	Excluding Tax	[WEBSITE]
» Apply discount on price including tax is calculated based on store tax, if “Apply Tax after Discount” is selected.		
Apply Tax On	Custom price if available	[WEBSITE]

Figure 133. Tax Calculation Settings

7. In the Tax Calculation Method Based On field, select which amount is used as the basis for calculating taxes. Because of rounding, this selection may affect the total amount of tax you charge on an order.

Option	Description
Unit Price	Using this rounding rule, Magento calculates the tax for each item and displays prices taxinclusive. To calculate the tax total, Magento rounds each of the item taxes individually and then adds them together.
Row Total	Using this rounding rule, Magento calculates the tax for each line. To calculate the tax total, Magento rounds each of the line item taxes and then adds them together.
Option	Description
Total	Using this rounding rule Magento calculates the tax for each item and adds those tax values to calculate the total unrounded tax amount for the order. Magento then applies the specified rounding mode to the total tax to determine the total tax for the order.

8. In the Tax Calculation Based On field, select whether the tax is calculated based on the customer's shipping address, billing address, or your store's shipping origin.
9. In the Catalog Prices field, specify whether the catalog prices of items include tax or exclude tax.
10. In the Shipping Prices field, select whether the shipping amounts include tax or exclude tax.
11. In the Apply Customer Tax field, select whether tax is applied to the original or discounted price.
12. In the Apply Discount on Prices field, select whether any discounts applied include the tax or exclude it.
13. In the Apply Tax On field, select whether tax is applied to custom prices or to original prices.
14. Expand the Default Tax Origin Calculation section to specify which country is used by Magento as the default for tax calculation, as shown in Figure 134.



Default Tax Origin Calculation

Default Country: United States


Default State: *

Default Post Code: *

Figure 134. Default Tax Origin Calculation

Note: If you select Including Tax for any of the options described in the following steps, then the tax is only displayed if there is a tax rule that matches the tax origin or if Magento detects that the customer address matches the tax rule (which happens after a customer creates an account, logs in, or uses the Tax and Shipping estimation tool in the cart).

15. Expand the Price Display Settings tab to select how prices for products shipping are displayed in the catalog (including tax, excluding tax, or both).
16. Expand the Shopping Cart Display Settings section to select how taxes and prices are shown for products and in a shopping cart according to the requirements (legal and otherwise) of your store, as shown in Figure 135.



Shopping Cart Display Settings		
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	Excluding Tax	[STORE VIEW]
Display Gift Wrapping Prices	Excluding Tax	[STORE VIEW]
Display Printed Card Prices	Excluding Tax	[STORE VIEW]
Include Tax In Grand Total	No	[STORE VIEW]
Display Full Tax Summary	No	[STORE VIEW]
Display Zero Tax Subtotal	No	[STORE VIEW]

Figure 135. Shopping Cart Tax Display Settings

17. Expand the Orders, Invoices, Credit Memos Display Settings tab to select how prices and taxes are displayed in orders, invoices, and credit memos.
18. Expand the Fixed Product Taxes tab to specify the behavior of fixed per product taxes, such as the European DEEE/WEEE (Waste Electrical and Electronic Equipment) tax, according to the requirements for your store and products.

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

Product Tax Class

You create product tax classes and assign products to them depending on the type of product.

For example, food might not be taxed (or might be taxed at a different rate).

To define a product tax class:

1. Select Sales > Tax > Product Tax Class to display the Product Tax Classes page (Figure 136), which shows a list of the previously defined product tax classes.

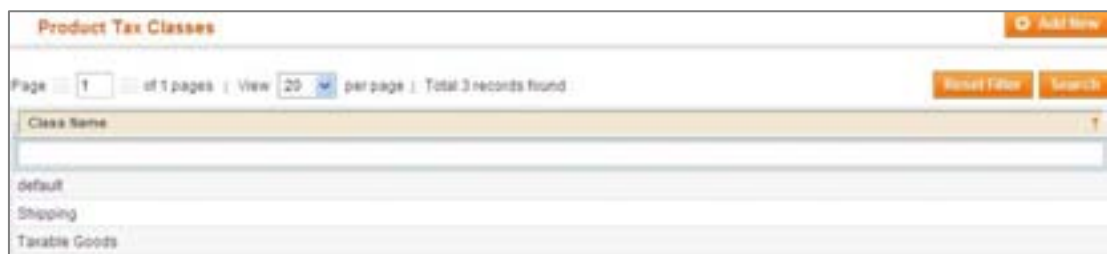


Figure 136. Product Tax Classes Page

2. Click the Add New button to display the New Class page, as shown in Figure 137.

Figure 137. New Product Tax Class Page

3. In the Class Name field, specify a name for this tax class.

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

4. Click Save Class.

Customer Tax Class

You create customer tax classes and assign customers to them depending on the type of customer.

For example, in some jurisdictions, wholesale transactions are not taxed but retail transactions are.

To define a customer tax class:

1. Select Sales > Tax > Customer Tax Classes to display a list of the previously defined customer tax classes.
2. Click the Add New button to display the New Class page, as shown in Figure 138.

Figure 138. New Customer Tax Class Page

3. In the Class Name field, specify a name for this tax class.

Note: You can link a customer tax class to a customer group by editing the customer group. You can then assign this customer group when creating or editing a customer.

4. Click the Save Class button.

Tax Zones and Rates

Tax rates are generally applicable to transactions that take place in specific geographical areas. The Tax Zones and Rates feature enables you to specify the tax rate for each geographical area for which you collect and remit taxes. Because you give each tax zone and rate specification a unique identifier, you can have multiple tax rates for a given geographic area (for example, for places that do not tax food or medicine but tax other products).

Note: Store tax is used for initial display purposes on orders. Store tax is calculated based on the store's address. Actual customer tax on an order is calculated after a customer enters their information, and then Magento calculates the actual tax based upon your store's tax configuration.

To define tax zones and rates:

1. Select Sales > Tax > Manage Tax Zones and Rates option to display a list of the previously defined tax zones and rates.

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

Figure 139. Manage Tax Rates Page

2. Click Add New Tax Rate to display the Add New Tax Rate page, as shown in Figure 140.

Add New Tax Rate [Back] [Reset] [Save Rate]

Tax Rate Information

Tax Identifier *

Country *

State

Zip/Post is Range

Range From *

Range To *

Rate Percent *

Tax Titles

English French German

Note: Leave empty to use tax identifier

Figure 140. Add New Tax Rate Page

3. Set the Tax Rate Information (and optional Tax Titles) options as shown in the following table.

Option	Description
Tax Identifier	This is the title of the newly created tax rate. Do not use spaces. This identifier is not visible to customers if the alternate Tax Titles section is used.
Country and State	Select the country and state to which the specific tax applies. Country is required. State becomes enabled if you specify a country that has states.
Option	Description
Zip/Post is Range	If you select No, specify the Zip or postal code in the Zip/Post Code field. You can use the asterisk (*) wildcard character in this field; for example, 90* means all Zip codes from 90000 through 90999. Select Yes if you want this tax applied to a specific range of Zip codes.
Range From / Range To	Specify the starting and ending Zip or postal code ranges.
Rate Percent	Specify the tax rate. Enter the tax rate as a percentage number. For example, enter 9.75 for a tax rate of 9.75%.

Tax Titles	This option applies only if you have a store in different languages and you want to have the languages displayed differently. Tax Titles let you name your tax rate if you have a store that is translated into different languages and you use the same tax rates for all languages.
------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

4. Click the Save Rate button.

Tip: You can export your tax rates to either CSV (comma-separated value) format or Excel XML format using the Export button at the top of the grid. It can be easier to manage your tax rates in a spreadsheet format if you are familiar with the requirements for importing and exporting in CSV or XML formats.

Tax Management Rules

Tax rules are defined as a combination of a customer tax class and a product tax class with a tax rate. In other words, based on the class of the customer (customer tax class), the class of the products (product tax class) in the shopping cart, and the region (tax rate depending on the shipping address, billing address, or shipping origin), Magento calculates the appropriate tax for each order.

Note: When you set up tax options, be sure to set your store scope so that the options are applied across stores and websites appropriately.

To define Tax Management Rules:

1. To define how taxes are charged, select Sales > Tax > Manage Tax Rules to display a list of the previously defined tax rules, as shown in Figure 141.

Manage Tax Rules					
<div> Page 1 of 1 pages View 20 per page Total 2 records found </div> <div> Add New Tax Rule Reset Filter Search </div>					
Name	Customer Tax Class	Product Tax Class	Tax Rate	Priority	Sort Order
Retail Customer-Taxable Goods-Rate 1	Retail Customer	Taxable Goods	US-CA-^Rate 1, US-NY-^Rate 1	1	1
Retail Customer-default-Rate 1	Retail Customer	default	US-CA-^Rate 1, US-NY-^Rate 1	1	1

Figure 141. Manage Tax Rules Page

Each tax rule is composed of a customer tax class, a product tax class, and a tax rate.

- To define a new tax rule, click Add New Tax Rule to display the Edit Rule page, as shown in Figure 142.

Tax Rule Information	
Name *	Retail Canada - PST
Customer Tax Class *	Retail Customer
Product Tax Class *	Taxable Goods Shipping
Tax Rate *	Canada-GST Canada-SK-PST US-CA-*Rate 1 US-NY-*Rate 1
Priority *	1 <small>▲ Tax rates at the same priority are added, others are compounded.</small>
Calculate off subtotal only	<input checked="" type="checkbox"/>
Sort Order *	0

Figure 142. Edit Rule Page

3. In the Tax Rule Information area, select the options as shown in the following table.

Option	Description
Name	Specify a name for this tax rule that will make it easy to identify.
Customer Tax Class	Select the customer tax class to which you will apply this tax rule.
Product Tax Class	Select the product tax class to which you will apply this tax rule.

Tax Rate	Select the tax rate to apply for this tax rule.
Option	Description
Priority	Specify the priority of this tax, when more than one tax applies. Lower numbers have higher priority. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount.
Calculate off subtotal only	Important: Check this checkbox for taxes to be calculated off only the subtotal of the order. This means that for this tax rule, tax applies only to the subtotal of the order.
Sort Order	Specify the order in which tax rules are displayed on the Manage Tax Rules page. Lower numbers have higher sort order in the list.

- Click Save Rule or Save and Continue Edit to save your changes.

Tip: When numerous taxes must be defined, you can ease the process by importing them from a spreadsheet. Select Sales > Tax > Import/Export Tax Rates.

Fixed Product Tax

Some tax jurisdictions have a fixed tax that must be added to certain types of products.

Magento lets you set up a fixed product tax (FPT) for use in your store's tax calculations. For example, in some countries FPT can be used to set up a WEEE tax, also known as "ecological tax" or "eco tax," that is collected on certain types of electronics to offset the cost of recycling. This tax is a fixed amount, rather than a percentage of the product price.

Taxes

Your tax jurisdiction might also have rules about how you display the price of products to your customers, either with or without tax. Be sure you understand those rules so that you can set your FPT display options accordingly.

Fixed Product Tax (FPT) Calculation

Fixed product taxes are applicable at an item level based on the product. In some jurisdictions this tax is subject to an additional % tax calculation.

FPT taxed/not taxed	Display setting and associated calculation
FPT is not taxed	<p>Excluding FPT: Treat FPT as a separate row in the cart and include the value of FPT in the appropriate tax calculations.</p> <p>Including FPT: FPT is added to the base price of an item but is not included in tax- rule-based calculations.</p> <p>Excluding FPT, FPT description, final price: Item prices are shown without FPT, FPT amount, and with FPT included. FPT is not included in tax-rule-based calculations.</p>
FPT taxed/not taxed	Display setting and associated calculation
FPT is taxed	<p>Excluding FPT: Treat FPT as a separate row in the cart and include the value of FPT in the appropriate tax calculations.</p> <p>Including FPT: FPT is included in the price of an item, and no change to tax calculations is required.</p> <p>Excluding FPT, FPT description, final price: Item prices are shown without FPT, FPT amount, and with FPT included. FPT is included in tax-rule-based calculations.</p>

Note: How you set the option to Display Prices in Sales Modules and Display Prices in Emails can affect customer confidence in their orders. For example, if you choose to display

Order Review prices without showing FPT, customers who buy items with associated FPT will see a total that includes the FPT tax amount, but they will not see an itemized entry for this amount. This might cause abandoned carts if your customers see an order total that does not match what they expect, based on an itemized list of products in the order.

Step 1: Enable the FPT Tax

To enable FPT:

1. From the Admin panel, select System › Configuration.
2. In the Configuration panel on the left, under Sales, select Tax.
3. Click to expand the Fixed Product Taxes section. The section displays the set of options shown in the following figure.

Fixed Product Taxes		
Enable FPT	Yes	[WEBSITE]
Display Prices In Product Lists	Including FPT and FPT description	[WEBSITE]
Display Prices On Product View Page	Including FPT and FPT description	[WEBSITE]
Display Prices In Sales Modules	Including FPT and FPT description	[WEBSITE]
Display Prices In Emails	Including FPT and FPT description	[WEBSITE]
Apply Discounts To FPT	No	[WEBSITE]
Apply Tax To FPT	No	[WEBSITE]
Include FPT In Subtotal	No	[WEBSITE]

Figure 143. Fixed Product Taxes Options

4. Set Enable FPT to "Yes."

5. Select one of the following options to determine how Fixed Product Taxes are displayed throughout your store (product page, catalog listing, etc.).

Option	Description
Including FPT only	The displayed price includes a fixed product tax, but not a description of the tax.
Including FPT and FPT description	The displayed price includes a fixed product tax and a description of the tax.
Excluding FPT	The displayed price does not include a fixed product tax.
Excluding FPT, FPT description, final price	The displayed price is shown not including FPT, and the FPT amount and subtotal are displayed on separate lines.

If you select Excluding FPT, FPT description, final price, the following figure shows what your customers see on the shopping cart page.

The screenshot shows a shopping cart interface. At the top, there's a 'Shopping Cart' header with a 'Proceed to Checkout' button. Below the header, a message states '24" Monitor was added to your shopping cart.' The cart table has columns for 'PRODUCT NAME', 'UNIT PRICE', 'QTY', 'SUBTOTAL', and 'REMOVE'. A single item, '24" Monitor', is listed with a unit price of \$207.50 and a quantity of 1. Below the unit price, a 'Recycling Fee' of \$10.00 is shown, leading to a 'Total' of \$217.50. A red box with the text 'FPT is shown separately with subtotal' and an arrow points to the 'Total' line item. Below the cart table, there are sections for 'Discount Codes', 'Gift Cards', and 'Estimate Shipping and Tax'. The 'Estimate Shipping and Tax' section shows a 'Subtotal' of \$217.50, a 'Grand Total Excl. Tax' of \$217.50, and a 'Grand Total Incl. Tax' of \$238.25. The tax breakdown shows 'Canada-GST (5%)' at \$10.38 and 'SK-PST at 5% (4.7619%)' at \$10.37, totaling \$20.75. A 'Proceed to Checkout' button is at the bottom right.

Figure 144. Shopping Cart Page with FPT Shown

- 6 Set Display Prices in Product Lists to determine how prices appear in products lists, such as the category page.
- 7 Set Display Prices on Product View Page to determine how prices appear on the product page.
- 8 Set Display Prices in Sales Modules to determine how prices appear in the Order Review section during checkout, and in the Items Ordered section of a sales order.
- 9 Set Display Prices in Emails to determine how prices appear in the sales email confirmation that is sent when an order is placed.
10. Set Apply Discounts to FPT to one of the following:
 - o Yes: Discounts are applied to the fixed product tax amount.
 - o No: Discounts are applied to the base price of a product without the fixed product tax included.
1. Set Apply Tax to FPT to one of the following:
 - o Yes: Tax is applied to the fixed product tax amount.
 - o No: Tax is applied to the base price of products without the fixed product tax included.
1. Set Include FPT in Subtotal to one of the following:
 - o Yes: The fixed product tax is included in the shopping cart subtotal.
 - o No: The fixed product tax is displayed under the shopping cart subtotal and is not included in the subtotal itself.
1. When complete, click the Save Config button to save the settings.

Step 2: Create a Fixed Product Tax Attribute for Products

To create the attribute:

1. From the Admin panel, select Catalog › Attributes › Manage Attributes.

- 2 To add a new FPT product attribute, click the Add New Attribute button in the upper right.
- 3 In the Attribute Code field, specify a unique identifier for this attribute. Do not use spaces or special characters. However, you can use hyphens or underscores. The maximum length is 30 characters. In this example, "eco_tax" is the attribute code.
- 4 In the Scope field, select the level at which the values of this attribute are shared, as shown in the following table.

Option	Description
Global	The value of this attribute for a given product must be the same throughout your website.
Website	The value of this attribute for a given product can differ on different websites; however, it cannot differ between store views contained under the same website.
Store View	The value of this attribute for a given product can differ on all websites and all store views. For example, if you were creating an attribute called Color, with a Store View scope, you would be able to set the color of a product to green in one store view, and blue in another store view.

- 5 In the Catalog Input Type for Store Owner field, select "Fixed Product Tax."
- 6 In the Apply To field, select one of the following options:
 - All Product Types ○ Selected Product Types: If you select this option, a dropdown list shows the product types to which you can choose to apply this attribute.
- 7 Click Save Attribute.

The following figure shows the New Product Attribute for the Fixed Product Tax.



New Product Attribute [Back] [Reset] [Save Attribute] [Save and Continue Edit]

Attribute Properties

Attribute Code *
▲ For internal use. Must be unique with no spaces.
Maximum length of attribute code must be less than 30 symbols

Catalog Input Type for Store Owner

Apply To *

Figure 145. Fixed Product Tax Attribute

Step 3: Assign the FPT Attribute to an Attribute Set

To assign the new attribute to an attribute set:

1. From the Admin panel, select Catalog > Attributes > Manage Attribute Sets.
2. In the Manage Attribute Sets area, click the name of the attribute set in which you want to include the FPT attribute. This example uses the Default attribute set.
3. The Edit Attribute Set 'Default' area displays a list of Groups and a list of Unassigned Attributes. Find your FPT attribute (eco_tax in this example) in the unassigned list and drag and drop it into the attribute group where you want it to appear.
4. Click Save Attribute Set.

In this example the eco_tax attribute is included the General attribute group, as shown in the following figure.

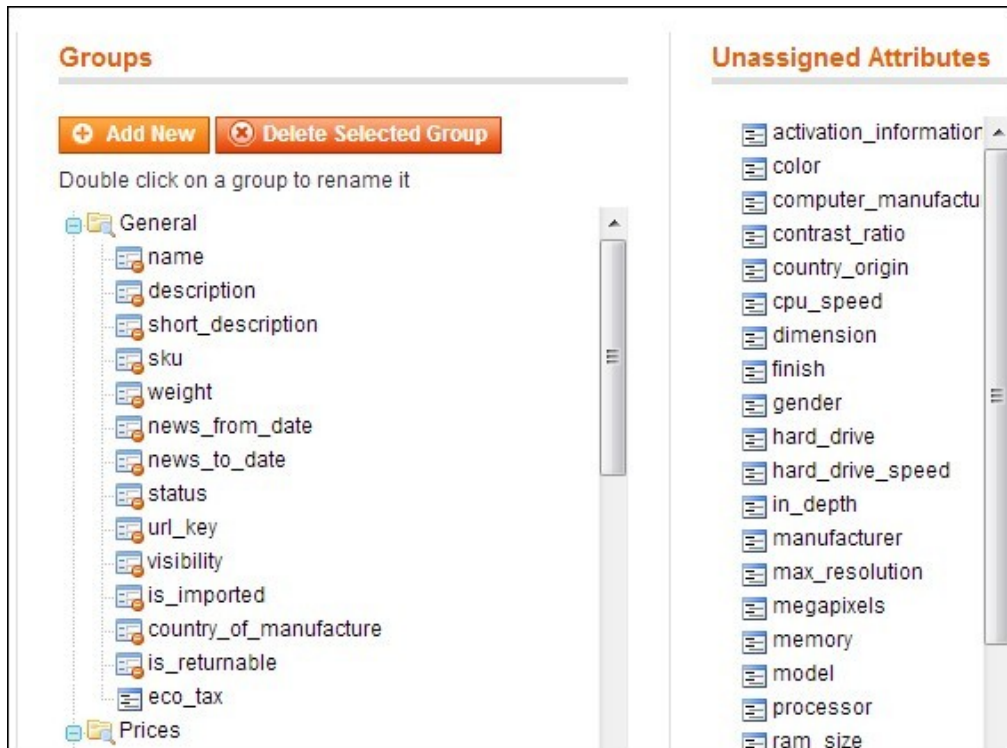


Figure 146. General Attributes Group with FPT Tax Attribute

Step 4: Apply the Fixed Product Tax to Products

To apply the FPT to products:

1. From the Admin panel, select Catalog > Manage Products.
2. For the product to which you want to add the FPT, click the Edit link in the Action column.
3. In the Eco Tax area, set the scope for the tax and the countries and states in which this tax will apply.
Depending on the choices you make, the input fields change to accommodate the details of where the tax will apply.
4. In the Tax box, enter the amount for the Fixed Product Tax.
5. To add more countries or states to which to apply the FPT, click the Add Tax button. You can apply a different amount for the tax for each locale where it applies.

- 6 When finished, click Save.

Value-Added Tax

Some countries charge a value added tax, or VAT, on goods and services. There can be different VAT rates depending on which stage you as a merchant are at in the manufacture or distribution of the products, materials, or services that you sell to your customers. In this case you may need to use more than one VAT rate in your store for tax calculation purposes.

This section provides a sample procedure for setting up a 20% VAT in the U.K. for sales to retail customers. For other tax rates and countries, follow the general procedure but enter specific information that corresponds to your country, VAT rate, customer types, and so on.

Note: Before proceeding, make sure to find out which rules and regulations apply to VAT in your area.

Note: In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. For more information, see "Appendix: VAT ID Validation," page 279.

Step 1: Set Up Customer Tax Classes

To set up example VAT customer tax classes:

1. From the Admin panel, select Sales > Tax > Customer Tax Classes.
2. Ensure that there is a customer tax class that is appropriate to use with the VAT. For this example, ensure that there is a customer tax class named Retail Customer. If Retail Customer does not exist, add it using the Add New button.

Step 2: Set Up Product Tax Classes

Taxes

To set up example VAT product tax classes:

1. From the Admin panel, select Sales > Tax > Product Tax Classes.

2. Click the Add New button and add three new classes:

o VAT

Standard o

VAT

Reduced o

VAT Zero

3. Click the Save Class button for each new class that you add.

Step 3: Set Up Tax Zones and Rates

To set up example VAT tax zones and rates:

1. From the Admin panel, select Sales > Tax > Manage Tax Zones & Rates.

2. For this example you can choose to remove the U.S. tax rates, or leave them as they are.

3. Click the Add New Tax Rate button. Add new rates as shown in the table below.

New Tax Rate	Settings
VAT Standard	Tax Identifier: VAT Standard Country and State: United Kingdom Rate Percent: 20.00
New Tax Rate	Settings
VAT Reduced	Tax Identifier: VAT Reduced Country and State: United Kingdom Rate Percent: 5.00

1. Click the Save Rate button for each new rate that you add.

Step 4: Set Up Tax Rules

A tax rule is a combination of a customer tax class, a product tax class, and a tax rate.

To set up example VAT rules:

1. From the Admin panel, select Sales > Tax > Manage Tax Rules.
2. Add new tax rules as shown in the table below.

New Tax Rule	Settings
VAT Standard	Name: VAT Standard Customer Tax Class: Retail Customer Product Tax Class: VAT Standard Tax Rate: VAT Standard Rate
VAT Reduced	Name: VAT Reduced Customer Tax Class: Retail Customer Product Tax Class: VAT Reduced Tax Rate: VAT Reduced Rate

1. Click the Save Rule button to save your VAT tax rules.

Step 5: Apply Tax Classes to Products

To apply example VAT classes to products:

1. From the Admin panel, select Catalog > Manage Products.
2. Select a product from your catalog to edit.
3. In the Product Information tab, in the General section, find the Tax Class option.

4. From the list, select the VAT class that applies to the product.
5. When finished, click the Save button.

Compound Taxes

For compound taxes, the total cost of a product or service is taxed at one rate, and then the total of that amount, including the first tax amount, is taxed a second time.

Compound tax is also known as stacked tax.

For example, in a regular tax calculation involving two tax rules, each rule is applied separately to the product subtotal, and the taxes are added together to calculate the total tax, which is then added to the product subtotal to calculate the grand total:

$$\begin{array}{r}
 \$50.00 \text{ Product Price} \\
 + \text{ } \$50.00 \text{ Product Price} \\
 \hline
 \$100.00 \text{ Subtotal} \\
 \\
 \$5.00 \text{ Subtotal} \times 1^{\text{st}} \text{ tax rate } 5\% \\
 + \text{ } \$10.00 \text{ Subtotal} \times 2^{\text{nd}} \text{ rate } 10\% \\
 \hline
 \$15.00 \text{ Total Taxes} \\
 \\
 \$100.00 \text{ Subtotal} \\
 + \text{ } \$15.00 \text{ Total Taxes} \\
 \hline
 \$115.00 \text{ Grand Total}
 \end{array}$$

Figure 147. Regular Two-Tax Calculation

With compound taxes, the first tax is added to the product subtotal, and the second tax is applied to that total:

$$\begin{array}{r}
 \$50.00 \text{ Product Price} \\
 + \underline{\$50.00 \text{ Product Price}} \\
 \$100.00 \text{ Subtotal} \\
 \\
 \$5.00 \text{ Subtotal} \times 1^{\text{st}} \text{ tax rate } 5\% \\
 + \underline{\$10.50 \text{ [Subtotal} + (\text{Subtotal} \times 1^{\text{st}} \text{rate)}] \times 2^{\text{nd}} \text{rate: } \$105 \times 10\%} \\
 \$15.50 \text{ Total Taxes} \\
 \\
 \$100.00 \text{ Subtotal} \\
 + \underline{\$15.50 \text{ Total Taxes}} \\
 \$115.50 \text{ Grand Total}
 \end{array}$$

Figure 148. Compound Tax Calculation

Setting Up a Compound Tax

You set up a compound tax in Magento using different priorities for tax rules. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount. Lower numbers have higher priority.

Important: In order for compound taxes to work correctly do not select the Calculate off subtotal only check box when you set up your tax rules that apply to compound taxes. This check box overrides the compounding calculation and cannot be used in conjunction with compound taxes.

To set up compound taxes:

1. Set up all the tax rates that will be used in your compound tax rule. See “Tax Zones and Rates,” page 133.

Taxes

- 2 Set up the first tax rule for compounding. For the first tax rule, be sure that you set a higher priority than you will set for the next tax rule, which will be compounded on top of this first tax rule. Lower numbers are used for higher priority. Use 0 for the highest priority. See “Tax Management Rules,” page 135.
- 3 Set up the second tax rule for compounding. For the second rule, be sure that you set a lower priority (use a higher number) than you set for the first tax rule.

11 Shipping

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

General Shipping Settings

To configure general shipping settings:

1. Select System › Configuration › Shipping Settings.
2. Expand the Origin section and specify the address used for shipping calculations. Typically, this is the warehouse address from which products are shipped, as shown in Figure 149.

A screenshot of the 'Origin' section in the Magento Shipping Settings configuration. It contains four input fields: 'Country' with a dropdown menu showing 'United States', 'Region/State' with a dropdown menu showing 'California', 'ZIP/Postal Code' with the text '90034', and 'City' which is empty. Each field has a small '(reset)' link to its right.

Figure 149. Shipping Origin Settings

3. Expand the Options section, as shown in Figure 150.

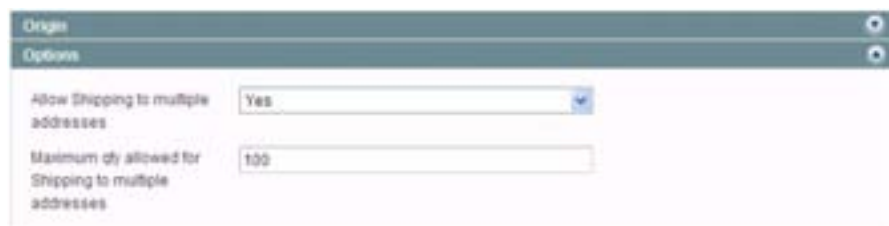
A screenshot of the 'Options' section in the Magento Shipping Settings configuration. It contains two settings: 'Allow Shipping to multiple addresses' with a dropdown menu set to 'Yes', and 'Maximum qty allowed for Shipping to multiple addresses' with a text input field containing the value '100'. Both settings have a small '(reset)' link to their right.

Figure 150. Shipping Options Settings

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

5. Click Save Config to save your changes.

Flat Shipping Rates

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

To define flat shipping rates:

1. Select System › Configuration › Shipping Method.

Shipping

2. Expand the Flat Rate section to define a fixed predefined amount for shipping, as shown in Figure 151.

The screenshot shows the 'Shipping Methods' configuration page in Magento. At the top, there is a 'Save Config' button. The main section is titled 'Flat Rate'. The configuration fields are as follows:

- Enabled:** A dropdown menu set to 'Yes'.
- Title:** A text field containing 'Flat Rate'.
- Method name:** A text field containing 'Fixed'.
- Type:** A dropdown menu set to 'Per Item'.
- Price:** A text field containing '\$.00'.
- Calculate Handling Fee:** A dropdown menu set to 'Fixed'.
- Handling Fee:** An empty text field.
- Displayed Error Message:** A text area containing the message: 'This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.'
- Ship to applicable countries:** A dropdown menu set to 'All Allowed Countries'.
- Ship to Specific countries:** A list box showing a scrollable list of countries including Afghanistan, Aland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda.
- Sort order:** An empty text field.

Figure 151. Flat Rate Shipping Settings

Tip: Magento CE also provides the option to specify table rates by expanding the Table Rates section. This feature enables you to define shipping rates by weight, destination, price, the number of items and various combinations of these categories. The table rates are entered by importing a CSV file. See <http://www.magentocommerce.com/knowledge-base/entry/how-do-i-set-up-table-rate-shipping> for more information.

3. In the Enabled field, select Yes. The flat rate method then appears as an option in the shopping cart and on the shipping page during the checkout.
4. The contents of Title and Method name fields appear in the frontend as shown in Figure 152.



Figure 152. Flat Rate Shipping Method and Title

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

- 5 In the Type field, specify the entity to which the shipping fee applies, such as Per Item. In this case, the shipping fee is dependent on the number of items shipped. If you set the rate to be per item, it is multiplied by the total quantity of items in the shopping cart. If you have two of the same item or two different items, then the rate is the same. You can also select Per Order in this field.
- 6 In the Ship to applicable countries field, you can select the Specific Countries option to enable access to the field under it in which you can select specific countries, so that the appropriate (and different) shipping rates are applied to the relevant countries, as shown in Figure 153.



Figure 153. Specific Countries Selection

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

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

Online Rates

Apart from static options such as flat rates and table rates, Magento CE also offers dynamic retrieval of rates from various shipping providers.

Shipping

Note: Most shipping providers require that you open an account with them.

Consult your shipping provider for details on how to obtain API credentials.

To enable and configure these shipping methods, expand the appropriate tabs (UPS, USPS, FedEx, or DHL) and configure the settings. The configuration of this method is similar to the configuration of a Flat Rate, as described above. The exact options depend on the service provider; contact the provider for more information.

For example, UPS rates can appear in your web store as shown in Figure

154.

The screenshot displays the 'Shipping Method' step of a Magento checkout process. On the left, a sidebar lists the steps: 'Shipping Method' is selected and highlighted in orange, while 'Billing Information', 'Payment Information', and 'Order Review' are visible below it. The main content area shows two shipping options: 'United Parcel Service' with sub-options 'Ground \$8.96', '3 Day Select \$4.89', '2nd Day Air \$11.82', and 'Next Day Air \$23.17'; and 'Flat Rate' with a sub-option 'Flat \$5.00'. A 'Back' link is at the bottom left, and a 'Continue' button is at the bottom right. On the right side, a 'YOUR CHECKOUT PROGRESS' sidebar shows the 'Billing Address' and 'Shipping Address' sections, both with a 'Change' link. The addresses listed are: Test Customer, Test Street 1, Test Street 2, Test City, California, 90123, United States, T: 123-123-1234.

Figure 154. UPS Shipping Options

Offering Free Shipping

Tip: Free shipping per product can be defined as a shopping cart price rule. See “Promotions,” page 189, for more information. This option enables you to set up free shipping that is valid only when a customer provides the appropriate discount code.

To define free shipping:

1. Select System › Configuration › Shipping Methods.
2. Expand the Free Shipping section to enable free shipping with optional minimum order amount, as shown in Figure 155.

Figure 155. Free Shipping Settings

3. In the Enabled field select Yes to enable the method.
4. In the Minimum order amount field specify the amount for an order over which shipping is provided free of charge.
5. In the Ship to applicable countries field, you can select the Specific Countries option to enable access to the field under it in which you can select specific countries, so that free shipping is only applied to the relevant countries or you can select the All Allowed Countries to specify that free shipping is available for users from all countries.

Acquiring Additional Shipping Modules

Numerous other shipping modules are provided at

<http://www.magentoocommerce.com/magento-connect> and new ones are uploaded

often. More information on installing shipping extensions is provided in “Extending Magento,” page 256.

12 Payment

Now that you have a method to calculate the cost of the shipping of your products, you can configure the payment options that enable the collection of money. Magento CE offers several payment options and many more can be added by downloading Magento payment module extensions, provided at <http://www.magentocommerce.com/magento-connect>. More information on installing payment module extensions is provided in “Extending Magento,” page 256.

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

PayPal

PayPal is one of the most popular ways to accept online payments. It enables you to accept credit cards and PayPal accounts. This section shows how to set up the PayPal Website Payments Standard method. Other PayPal payment methods are set up in a similar manner.

To set up payment by PayPal Website Payments Standard:

1. Your first step is to create a PayPal merchant account. Please check with PayPal (www.paypal.com) for detailed instructions.
2. In the Magento CE backend, select System › Configuration › PayPal to display the PayPal page, as shown in Figure 156.

Merchant Account

Merchant Country: United States [WEBSITE]
 = If not specified, Default Country from General Config will be used

Email Associated with PayPal Merchant Account: [WEBSITE]
 = [Select accounts payments via PayPal](#)

Select a PayPal Solution [Help](#)

- ☐ Express Checkout – Add an Express Checkout button to your existing shopping cart for quick and easy credit card payments. PayPal handles all payment processing. [View Demo](#) | [Learn More](#)
- ☒ Website Payments Standard – PayPal processes all of your orders, and you get paid. [View Demo](#) | [Learn More](#)
- ☐ Website Payments Pro – Process credit cards directly on your website with PayPal's all-in-one online payment processing solution. [View Demo](#) | [Learn More](#)
- ☐ Website Payments Pro Payflow Edition (includes Express Checkout) – Accept PayPal payments in your shopping cart. PayPal will process your credit card payments through the Payflow Pro Gateway. [Learn More](#)
- ☐ Payflow Pro Gateway – Don't have a PayPal merchant account? You can still accept credit card payments through the Payflow Pro Gateway. [Learn More](#)
- ☐ Express Checkout – Accept payments without customers leaving your website. Many popular web-hosting services and shopping carts come with the Payflow payment gateways built in, so they are easy to set up.
- ☐ Payflow Link (for USA and Canada) – Quick set-up service lets your customers securely complete transactions. [Learn More](#)

Figure 156. PayPal Page

3. In the Merchant Account section, select the country and specify the email address that is associated with your PayPal merchant account.
4. Select the Website Payments Standard check box to display the Website Payments Standard Settings section, shown in Figure 157.

Website Payments Standard Settings

Title: PayPal Website Payments Standard [STORE VIEW]
 = It is recommended to set this value to "PayPal" per store views

Sort Order: [STORE VIEW]

Payment Action: Sale [STORE VIEW]

Payment Applicable From: All Allowed Countries [STORE VIEW]

Sandbox Mode: No [STORE VIEW]

Transfer Cart Line Items: Yes [STORE VIEW]

Debug Mode: No [STORE VIEW]

[Paypal Billing Agreement Settings](#)

[Settlement Report Settings](#)

[Frontend Experience Settings](#)

Figure 157. PayPal Website Payments Standard Settings

- 5 In the Title field, specify a title to be shown to your customers.
- 6 In the Sort Order field, specify an integer number to indicate where this payment method should appear on the list of available payments on the frontend. A value of 1 places this payment at the top of the list, a value of 2 places it second, and so on.
- 7 In the Payment Action field, select one of the following options:
 - ❖ Authorization: Blocks or holds funds in the PayPal account until these funds have been transferred to your account. This usually occurs when you process the Order.
 - ❖ Sale: Specifies that funds are transferred to your account immediately.
- 8 In the Payment Applicable From field, leave the All allowed countries selection or select Selected Countries to select from a list of countries.
- 9 In the Sandbox Mode drop-down list, select whether this payment method is in sandbox mode. Sandbox mode is used when you are setting up and testing the payment method; no actual payments are processed.
- 10 In the Transfer Cart Line Items drop-down list, select whether information about each individual line item in the order is sent to the payment processor (Yes), or only the order total (No).
- 11 In the Debug Mode drop-down list, select whether this payment method is in debug mode. Debug mode is used when there is a problem processing a payment and you want to know what data is being exchanged with PayPal and where the error is occurring. Data (except for credit card numbers) is stored in the system log file.
- 12 Click Save Config.

Note: This procedure includes only the basic setup items for this particular PayPal payment method. For information about other PayPal payment methods and configuration options, see

<http://www.magentocommerce.com/knowledgebase/entry/setting-up-paypal-for-your-magento-store>.

PayPal Advanced

The PayPal Advanced payment method is available for merchants in the United States only.

General Concept

The PayPal Payments Advanced payment method passes the information about the card, entered by a customer, directly to PayPal; it is never stored in your Magento system. A customer does not need to have a PayPal account to use this method.

The PayPal Advanced payment method is not available for orders created from the Admin Panel.

Configuring PayPal Payments Advanced

To use the PayPal Advanced method, you should have a PayPal Payments Advanced account on PayPal. You need to have a separate account for each website.

Configuring the PayPal Advanced method for each website is a two-step procedure for each website:

1. Set the options in the Magento Admin Panel.
2. Set the required options of the PayPal Payments Advanced account on the PayPal Manager website.

Setting PayPal Payments Advanced Options in the Magento Admin Panel

To configure the PayPal Advanced payment method in the Magento Admin Panel:

1. Log in to the Magento Admin Panel.
2. Navigate to System › Configuration.
3. Select the desired website from the Current Configuration Scope drop-down list in the upper-left corner of the page.
4. Under SALES in the left column, click PayPal. In the Merchant Country field select United States. If any other country is selected, the PayPal Payments Advanced settings are not displayed.
5. In the Select a PayPal Solution section, select the PayPal Payments Advanced check box to make the payment method settings available. When the check box is selected, the corresponding configuration field set appears. The following settings are available:
 - Title: In the Title field, specify the name of the payment method that will be displayed to customers in the Payment Information section of the one-page checkout. This parameter can be set up for each store view.
 - Sort Order: When deciding to use a number of payment methods, in the Sort Order field determine the sequence number of this method in the list of available methods in the Payment Information section of the one-page checkout.

Note: The payment methods for which the sort order is not set are displayed first.

- Payment Action: Choose what type of transaction is conducted when the order is placed, and the entities that will be created in the backend as a result. The following options are available:

- Authorization: The payment is authorized and only an order is created in the backend of your store.
 - Sale: The payment is captured at PayPal's side, and as a result an order and an invoice are created in the backend of your store.
 - Payment Applicable From: Choose the countries from which customers can use this payment method. Choose between the following options:
 - All Allowed Countries: Customers from the default countries list can use this payment method.
 - Specific Countries: Only customers whose billing address includes one of the countries selected in the Countries Payment Applicable From field can use this payment method. The field basically works as a filter; so that this payment method will be listed for only those customers whose billing address is in one of these selected countries.
 - Debug Mode: In the Debug Mode field, specify whether communications with the payment system will be written into the log file. The log file for PayPal Payments Advanced is `payments_payflow_advanced.log`.
- 6 In the API/Integration Settings field set configure the following:
- In the Partner, User, Vendor and Password fields, specify your PayPal Payments Advanced account credentials.
 - Test Mode: The test mode helps testing the integration of Magento with the PayPal payment system. Transactions that are submitted while the account is in the test mode are not actually submitted to the credit card and electronic check processing networks, and credit card or bank accounts are not actually charged. Therefore, these transactions do not have valid transaction IDs. When you finish testing the integration project, the test mode must be turned off.
 - Use Proxy: Decide whether the proxy server is used for establishing the connection between Magento and the PayPal payment system. If you select Yes, two additional fields for specifying the proxy host and port are displayed.

7. Click Save Config in the upper-right corner of the page to save the settings.

Setting the PayPal Payments Advanced Account Options on the PayPal Manager Website

To make the necessary settings for the PayPal Advanced account, take the following steps:

1. Log in to <https://manager.paypal.com/>
2. Navigate to Service Settings > Hosted Checkout Pages. Options should be configured in the Set Up and Customize sections.
3. Configure the options according to the recommendations displayed in the PayPal Payments Advanced field set in the Magento Admin Panel.

PayPal Payments Advanced Method: Customer Experience

A store customer selects the PayPal Payments Advanced payment method on the Payment Information checkout step and clicks Continue. The Order Review step appears, where the PAY NOW button is available instead of the usual PLACE ORDER button. After the customer clicks PAY NOW, the PayPal-hosted form opens in the customer's browser. The customer enters the card information and clicks Verify Card. If the transaction is successful, the customer is redirected to the order confirmation page.

Note: The form also contains the Pay with PayPal button; clicking it redirects a customer to the PayPal site, where the customer can complete the payment using PayPal Express Checkout.

If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are handled on the PayPal side.

Order Processing When the PayPal Advanced Payment Method Is Used

Processing of orders that are paid using the PayPal Payments Advanced payment method is the same to regular processing of orders that are paid with PayPal. An invoice, shipment, and credit memo (online/offline refund) can be created. Multiple online refunds are not available for the PayPal Payments Advanced payment method.

When PayPal Advanced is used, an order is created in the Admin Panel once a customer clicks PLACE ORDER on the Order Review step of the one-page checkout. The order status upon creation depends on the response the system receives from PayPal, and can be one of the following:

- ❖ Processing: The transaction was successful
- ❖ Pending Payment: The system did not receive any response from PayPal
- ❖ Canceled: The transaction was not successful for some reason
- ❖ Suspected Fraud: The transaction did not pass some of the PayPal fraud filters. The system receives the response from PayPal that the transaction is under review by Fraud Service.

PayPal Express Checkout

Configuring the PayPal Express Checkout payment method is similar to setting up the other PayPal payment methods. For this reason, the details of the basic PayPal

Express Checkout setup are not described here. However, there are two aspects of PayPal Express Checkout that you should be aware of when setting it up: Saving the customer's billing address, and Order transactions.

Saving the Customer's Billing Address

Prior to version 1.11 of Magento Enterprise Edition and version 1.7 of Magento Community Edition, the PayPal Express Checkout payment method did not allow saving the complete billing address for the order in Magento. Starting with those versions this restriction has been removed and a complete billing address can be saved in a Magento order when the PayPal Express Checkout payment method is used by a customer. The billing address can be received from PayPal, and can be edited by the customer.

If you want to receive the billing address of a customer from PayPal for customers using the PayPal Express Checkout payment method, you need to take the following steps:

1. Enable the corresponding functionality is enabled in your PayPal merchant account. Contact the PayPal technical support for details.
- 2 In the Magento Admin Panel under System > Configuration > SALES > PayPal > Express Checkout Settings in the Require Customer's Billing Address field select Yes, and save the configuration. If you want to request customers billing address only for orders which contain downloadable and/or virtual products only, in the Require Customer's Billing Address field select For Virtual Quotes Only.

When customers choose to pay using PayPal Express Checkout, they are redirected to PayPal. Having logged in to PayPal and reviewed the payment information, they are redirected back to the store, to the Order Review page, where they choose the shipping method, edit the billing and shipping addresses and place the order.

Note: If a billing address cannot be received from PayPal because of your configuration or due to any other reasons, the billing address fields on the Order Review page are prepopulated with the shipping address values. A customer can edit them if necessary.

Figure 158 illustrates the Order Review store page when a customer uses the PayPal Express Checkout payment method.

Review Order

Please confirm your addresses

Billing Address

* First Name

* Last Name

Company

* Address

VAT Number

* City

* State/Province

* Zip/Postal Code

* Country

* Telephone

Fax

Same as shipping ☐

Shipping Address

* First Name

* Last Name

Company

* Address

VAT Number

* City

* State/Province

* Zip/Postal Code

* Country

* Telephone

Fax

Shipping Method

Items in Your Shopping Cart | [Edit Shopping Cart](#)

PRODUCT NAME	PRICE	QTY	SUBTOTAL
Book	\$7.00	8	\$42.00
+ Cover			
+ Mail			
Book2	\$5.00	2	\$10.00
Subtotal			\$52.00
Shipping & Handling (United Parcel Service - 3 Day Select)			\$17.83
Grand Total			\$69.83

Figure 158. The Order Review page when PayPal Express Checkout payment method is used.

If a customer leaves the billing and shipping addresses without changes, the PLACE ORDER button is enabled when the customer selects the shipping method in the Shipping Method field.

If the customer edits the billing or shipping address, the PLACE ORDER button is disabled. The customer needs to click the UPDATE ORDER DATA button first. The system will update the information, including the available shipping methods, and the PLACE ORDER button will be enabled.

After the customer clicks PLACE ORDER, the order is created in Magento, and PayPal performs the related transaction(s). The complete billing and shipping addresses are saved in the order record in Magento.

Order Transactions in PayPal Express

Magento includes the option of using a new payment action, “Order,” for the PayPal Express Checkout payment method. When a store customer submits an order, having paid using the PayPal Express Checkout payment method, for which the Order payment action is set, the funds on the customer’s card are authorized. If the authorization times out before you capture all payment, the authorization is voided, and a new authorization and capture are conducted when you create an invoice. Only the amount equal to the invoice total is authorized and captured. The maximum number of these authorizations for one order, and the periods for which the first authorization and the order in general stay valid, depend on your PayPal merchant account settings. These parameters need to be specified in the Magento Admin Panel as well. Capturing can be done only from the Magento Admin Panel, by creating one or more invoices.

Situations in which using the “Order” transaction may be appropriate include the following:

- ❖ Back orders, in which available items are sent immediately, and the remaining part of the order is sent when available; this may include more than two shipments
- ❖ Split orders, in which ordered items are sent in more than one shipment, perhaps to different addresses, and you want to collect a payment for each shipment
- ❖ Drop shipments, which are shipments from other vendors for which you accept the payment

Using the order payment action does not influence the checkout process for store customers.

Configuring the Payment Action for the PayPal Express Checkout

To change the payment action settings for the PayPal Express Checkout payment method:

1. In the Magento Admin Panel, select System > Configuration > SALES > PayPal.

Configuration can be done either on the global or website level, so in the Current Configuration Scope drop-down list located in the upper left part of the page, leave Default Config or select the desired website.

2. In the Express Checkout Settings field set, in the Payment Action drop-down menu, select Order.

3. Configure these additional settings, which correspond to settings in your PayPal merchant account:

- ❖ Authorization Honor Period (days): Defines how long the primary authorization stays valid.

The value should be equal to the corresponding value in your

PayPal merchant account. The default value in your PayPal merchant account is 3. To increase this number you need to contact PayPal. The authorization becomes invalid at 11:49 p.m., U.S. Pacific Time, of the last day.

- ❖ Order Valid Period (days): Defines how long the order remains valid. When the order becomes invalid, you can no longer create invoices for it. Specify the value equal to the Order Valid Period value in your PayPal merchant account. The default value in your PayPal merchant account is 29. To change this number, you need to contact PayPal

- ❖ Number of Child Authorizations: Defines the maximum number of authorizations for one order. That is, the maximum number of the online partial invoices you can create for one order.

The number in this field should be equal to the corresponding setting in your PayPal merchant account. The default number of child authorizations in your PayPal account is 1. To increase this number, you need to contact PayPal.

4. Click Save Config in the upper-right corner of the page to save the new configuration.

Managing Orders Paid Using PayPal Express Checkout with Payment Action Set to Order

When the store customer submits the order, having paid using the PayPal Express Checkout payment method, for which the “Order” payment action is set, the order (with Processing status) is created in the Admin Panel. Two transactions are created for this order: one with type Order and one with type Authorization. See Figure 159.



Figure 159. Order transaction for PayPal Express Checkout

The funds on the customer’s account are put on hold, and you can capture the payment only from the Magento Admin Panel. To capture, you need to create an online invoice. Once you choose to create an online invoice, Magento determines whether the number of days passed from the first authorization exceeds the Order Valid Period value. If more days have passed, you cannot create an online invoice for this order.

If the order is valid, Magento determines whether the first authorization is valid, comparing the number of days passed with the Authorization Honor Period value. If the authorization is valid, the necessary sum is captured; the rest is left on hold, and the number of captures is not limited. If the authorization is not valid anymore, it is voided. A new authorization and capture are created, but for the invoice total (not the order total). From this moment, each time you create an online invoice for this order, a new authorization and capture will be conducted only for invoices totals.

Also, Magento will determine whether the number of the conducted captures is equal to the Number of Child Authorizations value each time. If the number specified there is already reached, creating online invoices for the order will not be possible.

If you click the Void button on the order view page, the Order transaction is voided.

After this, no online invoice can be created for the order.

Note: PayPal provides an option of capturing an amount larger than was ordered. However, this option is not supported in Magento.

Other Payment Methods

To define payments methods:

1. In the Admin Panel, select System > Configuration > Payment Methods to display the Payment Methods page, as shown in Figure 160.



Figure 160. Payment Methods

A few payment options are described as follows.

Saved Credit Cards

This option enables you to take credit cards and to process them offline. This method is useful when you have a card terminal in a brick and mortar store or have access to a virtual terminal. This payment method is enabled by default in the Sample Data.

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

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

To set up the Saved Credit Cards payment method:

1. Select System > Configuration > Payment Methods to display the Payment Methods page.
2. In the Current Configuration Scope drop-down list, select the scope for these configuration selections.
3. Expand the Saved CC section to define credit cards, as shown in Figure 161.

The screenshot shows a configuration window titled "Saved CC". It contains several settings, each with a label, a value field, and a "(RESTORE)" link.

Label	Value	Link
Enabled	Yes	(RESTORE)
Title	Credit Card (saved)	(STORE VIEW)
New Order Status	Pending	(RESTORE)
Credit Card Types	American Express, Visa, MasterCard, JCB, Laser, UATP, Diners Club, Switch/Maestro, Discover, Solo	(RESTORE)
Request Card Security Code	No	(RESTORE)
3D Secure Card Validation	No	(RESTORE)
Payment from Applicable Countries	All Allowed Countries	(RESTORE)
Payment from Specific Countries	Afghanistan, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina	(RESTORE)
Minimum Order Total		(RESTORE)
Maximum Order Total		(RESTORE)
Sort Order		(RESTORE)

Figure 161. Saved Credit Card Configuration Options

4. Make your configuration selections. Most of these options are self-explanatory. The options that may need some explanation are as follows:
 - ❖ Request Card Security Code: Determines whether the payment method interface on the frontend requires the customer to supply the security code on the back of the card. If your credit card terminal requires the security code, set this option to Yes.
 - ❖ 3D Secure Card Validation: Determines whether credit card validation is carried out using the 3D Secure system. You must be a 3D Secure system subscriber, and you must first set up the general 3D Secure configuration options in System > Configuration > Payment Services.

5. Click Save Config to save your changes.

This option appears in the web store as shown in Figure 162.

YOUR CHECKOUT PROGRESS

Billing Address | Change

Test Customer
Test Street 1
Test Street 2
Test City, California, 90123
United States
T: 123-123-1234

Shipping Address | Change

Test Customer
Test Street 1
Test Street 2
Test City, California, 90123
United States
T: 123-123-1234

Shipping Method | Change

Flat Rate - Fixed \$5.00

Payment Method

Figure 162. Saved Credit Card Payment Method (Frontend)

Customers who place an order in your web store and use the Saved Credit Card payment method see their card details as shown in Figure 163.

Payment Information
Name on the Card: FirstName LastName
Credit Card Type: Visa
Credit Card Number: 4111111111111111
Expiration Date: 12/2010
Order was placed using USD

Figure 163. Credit Card Information (Frontend)

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

Visa 4111111111111111

MasterCard 5555555555554444

American Express 378282246310005

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

Checks and Money Orders

This payment method enables you to accept paper checks and money orders as payment. The order remains in Pending status until the payment is received (or clears your bank, if you prefer).

This payment method is enabled by default in the Sample Data. Expand the Check/Money Order section to define how checks and money orders are accepted in your web store, as shown in Figure 164.

Check / Money Order

Enabled	Yes	[RESET]
Title	Check / Money order	[STORE VIEW]
New Order Status	Pending	[RESET]
Payment from Applicable Countries	All Allowed Countries	[RESET]
Payment from Specific Countries	Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina	[RESET]
Make Check Payable to		[STORE VIEW]
Send Check to		[STORE VIEW]
Maximum Order Total		[RESET]
Maximum Order Total		[RESET]
Sort Order		[RESET]

Figure 164. Check/Money Order Configuration Options

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

This option appears in the web store as shown in Figure 165.

The screenshot displays the Magento checkout process at the 'Payment Information' step. An orange arrow highlights the 'Check / Money order' radio button. Below it, the 'Make Check payable to' field is populated with 'TestCompany'. The 'Send Check to' section lists a test address: 'Test Address 1', 'Test Address 2', 'Test City, CA 90456', and 'United States of America'. The 'Credit Card (saved)' option is also present. The right sidebar, titled 'YOUR CHECKOUT PROGRESS', shows the current step and provides links to change billing and shipping addresses. The shipping address is also listed as a test address in California. A 'Flat Rate - Fixed \$5.00' shipping method is selected. A 'Continue' button is visible at the bottom right of the payment section.

Figure 165. Check/Money Order Payment Method (Frontend)

Other Payment Methods

There are numerous other payment methods available in the backend, and others can be obtained from Magento Connect

(<http://www.magentocommerce.com/magentoconnect>).

Most of the configuration options for these payment methods are similar to the options described in this chapter. Other configuration options are specific to each payment method, and you should consult the information you received when you subscribed to a given payment method to understand how these options work.

13 Design and Content

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

Overview

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

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

Terminology

Following are some of the terms you should be familiar with when customizing the design of your store:

Block: A Magento CE feature that modularizes page elements for easier management.

Content block: Block that produces content, such as the content of a category list, mini cart, or product list. See also Structural block.

Content Management System (CMS): A Magento CE feature that stores pages or parts of pages that you can use in your store.

Layout: File that maps content blocks to structural blocks. More than one content block can be mapped to a single structural block.

Skin file: File that define the visual functional specifications of page elements, such as text, graphics, and the logic behind buttons and other controls.

Structural block: Block created for the sole purpose of assigning visual structure to a store page; for example, header, footer, left column, main column.

Template: A collection of XML and other files that define the block structure and logic for visual presentation.

Theme: a collection of templates and skin files that control the visual elements of your store. These visual elements are applied to all pages in your store, giving your store a consistent look and feel throughout.

Changing the Web Store's Theme

When you first install Magento CE, the design elements of your store are based on the Default Theme. You can modify this theme, add themes created by others, or create new themes from scratch.

Tip: To design your own theme, see the Magento Designers Guide at http://www.magentocommerce.com/design_guide

To add and activate a theme in your store:

1. Go to the Magento Connect site (http://www.magentocommerce.com/magento_connect). This site contains hundreds of extensions, which are add-ons to Magento software that can extend or enhance the look or functionality of your store. New ones are uploaded often.
2. Click on the Core link to select one of the free extensions provided by Magento. The extensions are listed in the center of the page, as shown in Figure 166.



Figure 166. Magento Connect

3. This example demonstrates the implementation of the Modern Theme. Scroll down the list of extensions and select the Modern Theme.
4. Install the theme as you would any other Magento extension. See “Extending Magento,” page 256, for more information.
5. You can now activate this theme so that the web store

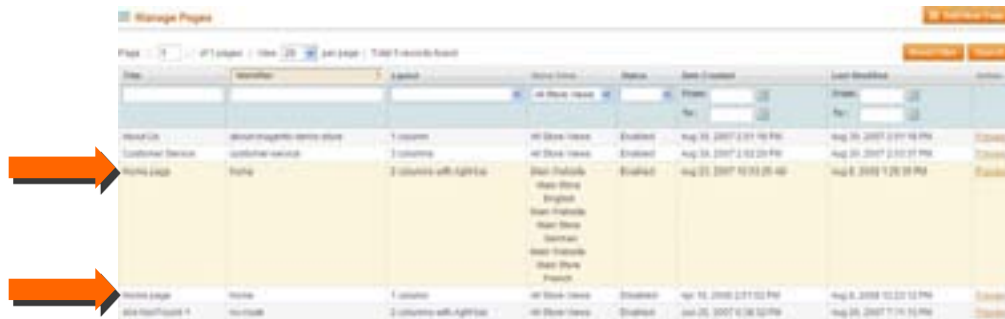
appears with a new layout. Select System > Configuration > Design and expand the Themes section. The Design page is displayed, as shown in Figure 167.



Figure 167. Design Page

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

- 6 In the Default field, specify the name of the theme. In this example it is called Modern.
- 7 Click the Save Config button on the top right of the page. The header, footer, menu bar, and background of the frontend now look different according to the new theme. 8 If your home page appears incorrect, it may be because the layout that you selected is suited to two columns when your home page has one column or vice versa. For the Modern theme, the following change must be applied so that that the frontend home page appears properly. From the top menu bar in the Admin Panel, select CMS > Pages to display the Manage Pages page, as shown in Figure 168.



Page	Identifier	Layout	Store View	Status	Date Created	Last Modified	Actions
Home page	home	2 columns with right bar	All Store Views	Enabled	Aug 15, 2007 2:01:16 PM	Aug 15, 2007 2:01:16 PM	[Edit] [Delete]
Home page	home	1 column	All Store Views	Disabled	Aug 15, 2007 2:01:16 PM	Aug 15, 2007 2:01:16 PM	[Edit] [Delete]

Figure 168. Manage Pages Page

This page shows two Home Page rows:

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

9. Click on the first and second rows of the homepage. The page shown in Figure 169 is displayed for each of them.



Edit Page 'Home page'

Back Reset Delete Page Save Page Save and Continue Edit

Page Information

Page Title * Home page

URL Key * home
Relative to Website Base URL

Store View *
 All Store Views
 Main Website
 Main Website Store
 aaaaaa
 Default Store View
 Test Site
 Test Store 1
 French

Status * Enabled

Figure 169. Edit Page Page

- ❖ Change the Enabled status of the page with 2 columns with right bar layout to Disabled.

- ❖ Change the Disabled status of the page with 1 column layout to Enabled. The homepage of the frontend now appears similar to the page shown in Figure 170.



Figure 170. Frontend Home Page With New Theme

Managing CMS Pages

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

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

To add a CMS page:

1. Select CMS > Pages to display the list of currently defined CMS pages as shown in Figure 168.
2. Click the Add New Page button on the top right of the page to display the New Page page, as shown in Figure 171.

The screenshot shows the 'New Page' form in a CMS interface. The form is titled 'New Page' and has a 'Back' button and 'Add New Page' button. It contains fields for 'Page Title *', 'URL Key *', 'Store View *', and 'Status *'. The 'Store View *' field is expanded, showing a list of options: 'All Store Views', 'Main Website', 'Main Website Store', 'Admin', 'Default Store View', 'Test Site', 'Test Store #', and 'French'. The 'Status *' field is set to 'Enabled'.

Figure 171. New Page Page

3. In the Page Title field, specify the words to appear in the browser's title bar.
4. In the URL Key field, specify the unique identifier to be used in the URL. It must contain all lower case letters and no spaces. The following example uses our_history.
5. Leave the default value in the Store View field.
6. In the Status field, select Enabled.
7. Click Content in the left navigation bar. Use the WYSIWIG editor to define the content for this page.
8. Click Design in the left navigation bar to open the design options, as shown in Figure 172.

The image shows two stacked panels from a web application. The top panel, titled 'Page Layout', has a 'Layout *' dropdown menu set to '1 column' and a 'Layout Update XML' button. Below these is a large empty rectangular box. The bottom panel, titled 'Custom Design', contains five fields: 'Custom Design From' and 'Custom Design To' (both with empty text boxes and file upload icons), 'Custom Theme' (a dropdown menu set to '-- Please Select --'), 'Custom Layout' (a dropdown menu set to '-- Please Select --'), and 'Custom Layout Update XML' (a button). Below these fields is another large empty rectangular box.

Figure 172. Custom Design Options

- 9 Click the Layout field and then select one of the following options:
- ❖ Empty: Shows the content of an empty page with no header, footer or side bars.
 - ❖ 1 Column: Displays all the content entered in a single central column with a header and footer.
 - ❖ 2 Columns with left/right bar: Displays all the content entered on the page with a header, footer and left/right bar.

- ❖ 3 columns: Displays both the left and right columns from the design package with the content shown between.

10. Click Save Page. You can now open a browser and browse to this Landing page.

The URL is taken from the value that you specified for URL Key, as described above. For example: /our_history is added to the web store's URL.

11. The following steps show how to add a link to this page from the frontend's footer. Select CMS > Static Blocks option to display the list of existing Static Blocks.

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

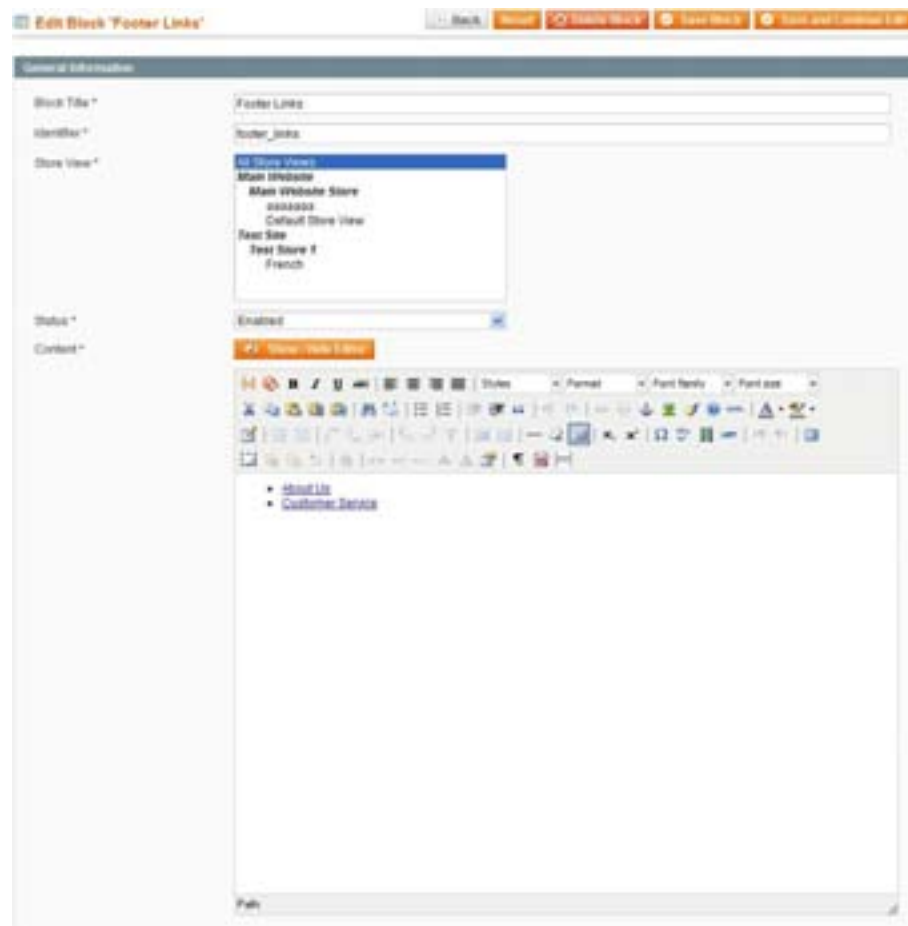



Figure 173. Editing a Static Block

13. In the Content field, use the WYSIWYG editor to add a link to the new page. You can do this by pressing ENTER after one of the existing links, typing the link text, selecting this text, and clicking the Link icon (). Use the Insert/Edit Link dialog box to specify the link attributes, as shown in Figure 174.

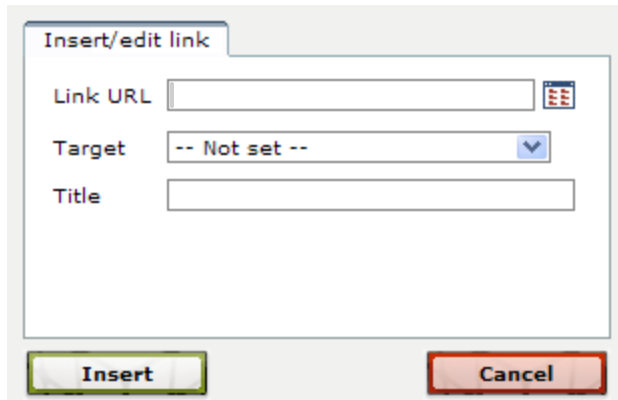
The image shows a dialog box titled "Insert/edit link". It contains three input fields: "Link URL" with a small icon to its right, "Target" with a dropdown menu showing "-- Not set --", and "Title". At the bottom of the dialog are two buttons: "Insert" and "Cancel".

Figure 174. Insert/Edit Link Dialog Box

The footer of the frontend now appears as shown in Figure 175.

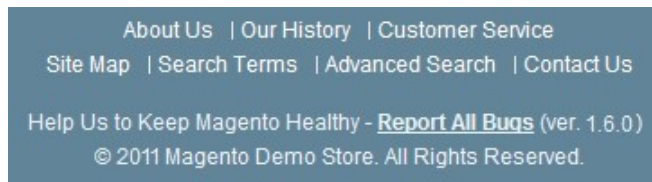


Figure 175. Updated Footer Block

Customizing Transactional Emails

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

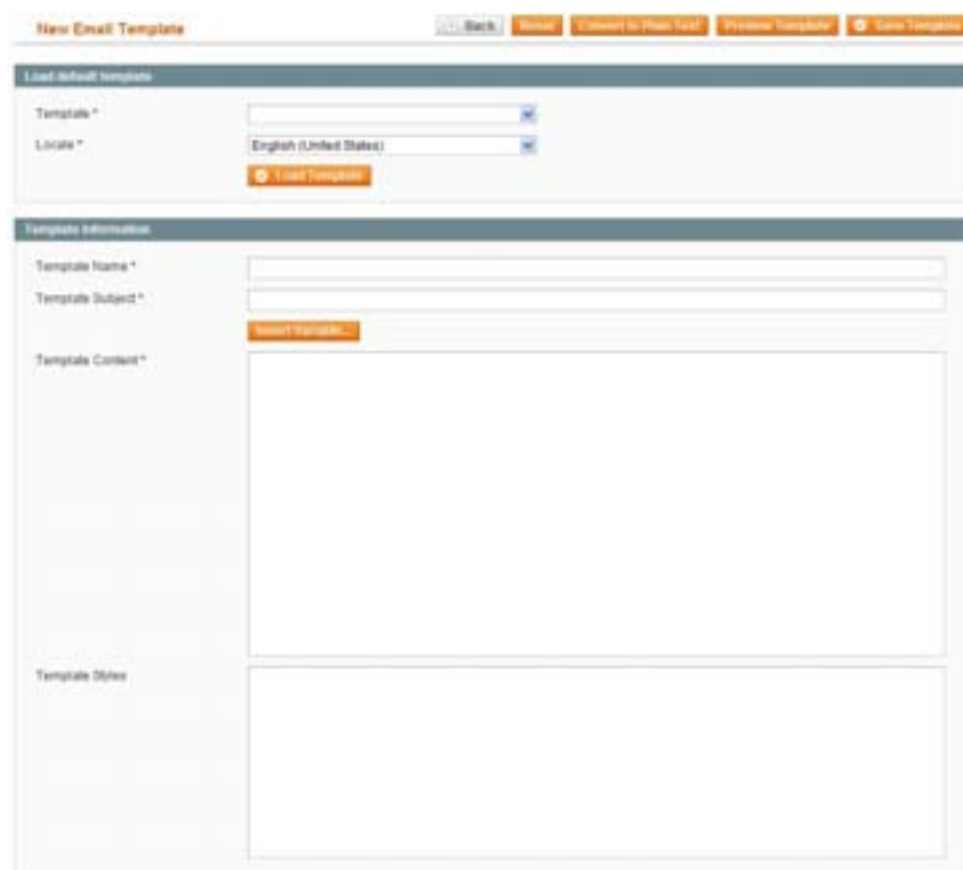
This section describes how to modify the emails that are sent from the web store, for example, when an account is created or an order is placed.

To customize a transactional email template:

1. Select System > Transactional emails to display a list of the custom email templates created in this web store.

Note: This page shows only customized emails. If this page is empty, it means that Magento will only send standard default emails.

2. Click the Add New Template button to display the New Email Template page.



The screenshot shows the 'New Email Template' page in the Magento admin interface. At the top, there is a breadcrumb trail: 'System > Transactional Emails > New Email Template'. Below this, there are several action buttons: 'Back', 'Cancel', 'Save', 'Preview Template', and 'Save Template'. The page is divided into two main sections. The first section, 'Load default template', contains a 'Template' dropdown menu, a 'Locale' dropdown menu (set to 'English (United States)'), and a 'Load Template' button. The second section, 'Template Information', contains three text input fields: 'Template Name', 'Template Subject', and 'Template Content'. There is a 'Save Template' button next to the 'Template Subject' field. Below these fields is a 'Template Style' section with a large text area.

Figure 176. New Email Template Page

3. In the Template field, select the name of one of the transactional emails that you want to customize, such as New account.
4. In the Locale field, select the language.
5. Click Load Template.
6. In the Template Name field, specify a name for the customized email template.
7. If desired, modify the Template Subject field.
8. In the Template Content area, use the WYSIWIG editor to modify the content. You must change the contact phone number and email address as well as the logo image reference at the top of the page to reflect your own store information in all active templates.
9. Click the Save Template button.
10. Now that your customized email template is ready and available, the next step is to inform Magento CE that it should use this template to send email to customers instead of the default template. This is controlled in various configuration sections depending on the type of email.

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

Facebook Open Graph Extension 2.0 for Magento

The Facebook Open Graph 2.0 extension enables you to add custom social networking buttons to your store. The extension uses the new Facebook Open Graph 2.0 protocol.

Compatibility

The Facebook Open Graph 2.0 extension is compatible with Magento Enterprise Edition and Professional Edition 1.8 and later, and Magento Community Edition 1.3 and later.

Downloading and Installing

The Facebook Open Graph 2.0 extension is free of charge; you can download it from [Magento Connect](#), the official marketplace for Magento extensions.

Installing

You can install the extension using the Magento Connect Manager. To access it in the Magento Admin Panel navigate to System › Magento Connect › Magento Connect Manager.

Setting Up

To make new social networking buttons appear in your store, after installing the extension you need to take two basic steps:

1. Create an application on the Facebook Developers site
2. Configure Magento

In the following subsections these procedures are described in detail.

Creating an application on the Facebook Developers site

The current implementation of the Facebook Open Graph 2.0 extension requires an application to be created manually on the Facebook Developers site.

To create an application:

1. Navigate to <http://developers.facebook.com/>
2. Click Apps in the top menu
3. Click Create New Application and perform all of the steps of the app creation wizard. Using the app by the Facebook Open Graph 2.0 extension implies the following restrictions and requirements:
 - Please note, that the App Namespace value, which you set on the first step of the app creation, will be used in Magento configuration.

In the left column select Settings > Basic. Under the Select how your app integrates with Facebook heading select Website. In the Site URL field enter your store address. See Figure 177.

Important Note: Your website and store should have one domain name.

facebook DEVELOPERS Documentation Support Blog Apps Search Documentation / Apps

Settings
Basic
Advanced
Open Graph
Roles
Credits
Insights

Related links
Use Debug Tool
Use Graph API Explorer
Promote with an Ad
Translate your App
View App Profile Page
Delete App

Apps » Alex app » Basic

Alex app
App ID: 117940004577467
App Secret: 2790a6c346b72d46f8a6b45c22ba82 (new)
(edit icon)

Basic Info

App Display Name: Alex app
App Namespace: alex_app_a
Contact Email: alex@alexal.com
App Domain:
Category: Other Choose a sub-category

Cloud Services

Need hosting for your app? We are partnering with the top cloud service providers to make building apps easy.
Get Started Learn More

Hosting URL: You have not generated a URL through one of our partners (Get one)

Select how your app integrates with Facebook

☒ Website Site URL:
☐ App on Facebook I want to build an App on Facebook.com
☐ Mobile Native I have an iOS or Android app
☐ Page Tab I want to build a custom tab for Facebook Pages

Save Changes

Figure 177. Website settings on Facebook Developers

- For Action Types in the Advanced settings in the Graph API URL field enter own, want or other action you want to be associated with a social networking button on your product pages. This title is for internal use. See Figure 178.

facebook DEVELOPERS Documentation Support Blog Apps Search Documentation / Apps

Settings

Open Graph

Getting Started

Dashboard

Roles

Credits

Insights

Related Tools

Use Debug Tool

Use Graph API Explorer

Promote with an Ad

Translate your App

View App Profile Page

Delete App

Apps > x.com int > Open Graph > Action Type: Own

Name: Examples: Buy, read, watch

Connected Object Type: Which object types can your action type connect to?

Action Properties:

Start Time: End Time: Sample Start Time:

End Time: Sample End Time:

More +

ID: Reference: Sample ID:

Add Another Property Examples: Author, Category, Director, Length

Post Types: owned +

Graph API URL: (highlighted with a red rectangle)

Unique Actions: ☒ Allow Multiple ☐ Allow Only Once

Requires App Token to Publish: ☐ Yes ☒ No

Hide Advanced

Save Changes Cancel

Figure 178. Object Type settings in the Facebook Developers Application

Note: You cannot set the “dislike” action as it is not supported by Facebook Open Graph 2.0.

- The Object Type you create should have the following Object Properties:
- URL (page URL)
- Title (product title)
- Image (image URL)
- Description (product description)
- Price

By default, a new Object Type has only the first four properties. To add the Price property, use the Add Another Property button on the Object Type page. See Figure 179.



Figure 179. Adding properties to an Object Type

Configuring Magento

To configure the Facebook Open Graph 2.0 extension settings in Magento Admin Panel:

1. Navigate to System > Configuration > SOCIAL > Facebook. If you don't see the SOCIAL heading in the left column, you may have not installed the extension.
2. In the Current Configuration Scope drop-down list in the upper left corner of the page select your website.
3. Under Facebook Config set the following:
 - ❖ Enable Facebook on Frontend: Select Yes if you want social buttons to appear on the frontend.
 - ❖ App Namespace: Enter the App Namespace value of your application. You can find it in the Basic Settings section of your app on the Facebook Developers site. See Figure 180 for illustration.

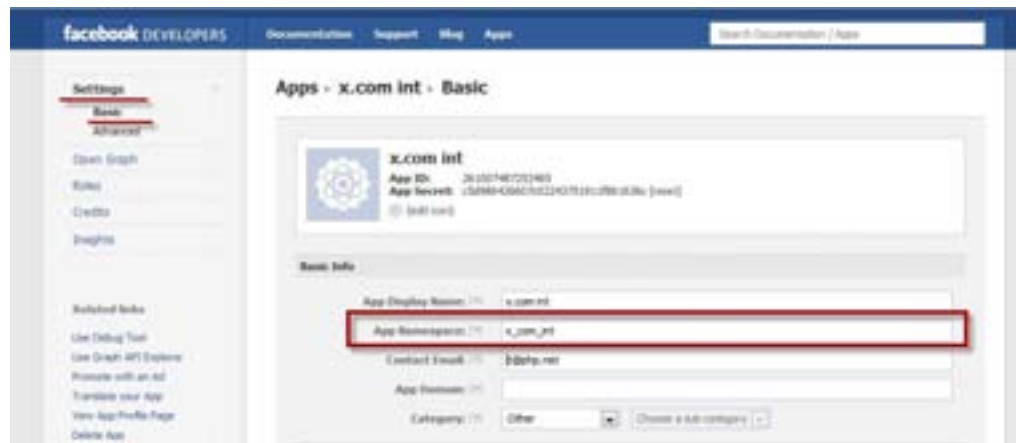


Figure 180. App Namespace value

- ❖ App ID and App Secret: Specify the App ID and App Secret values of your application. You can find it in the Basic Settings section of your app on the Facebook Developers site. See Figure 181.



Figure 181. App ID and AP Secret values

- ❖ Object Type – Enter the Open Graph Type value of your Object Type. To find it on the Facebook Developers site, open the settings of your application, navigate to Open Graph > Dashboard, click your object type, and expand the Advanced settings. On the page header the system will display the Apps > %Your Facebook Application Name% > Open Graph > Object Type: %Object name%. See Figure 182.

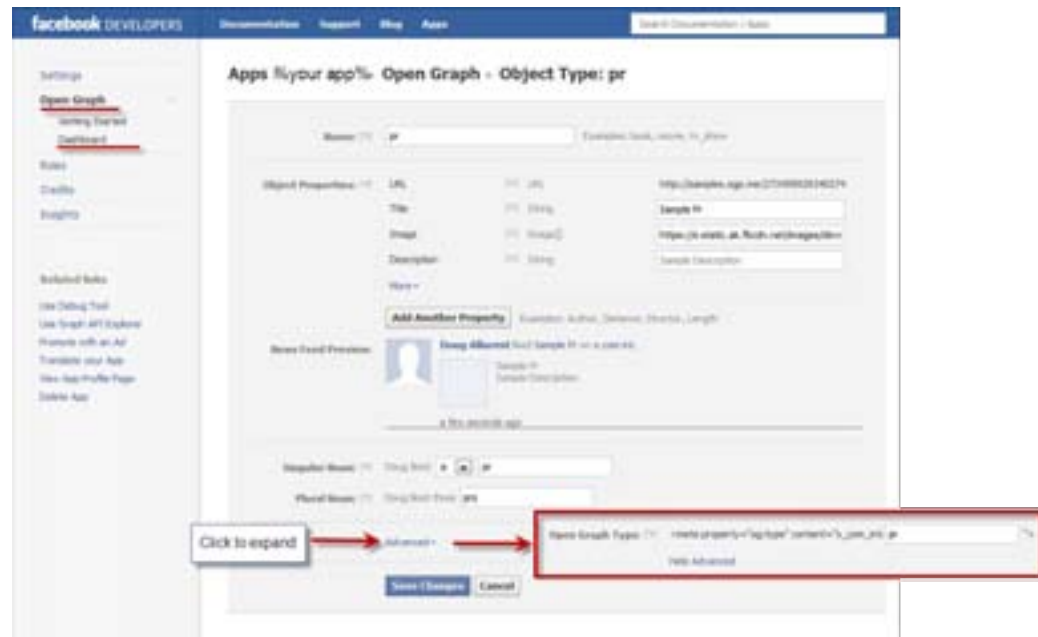


Figure 182. Open Graph Type setting

- ❖ Actions Settings (can be different for each store view: To add and configure a social networking button, click Add Action Button. For each button, specify the following:
 - In the Action column, specify the internal button action title, for example, own or want. This value should correspond to the value you have specified in the Graph API URL field on the Facebook Developers site. The Graph API URL field is available in the Advanced section of the Action Type settings. See Figure 178.
 - In the Button Title column, specify the name of the social networking button as you want it to appear in the frontend.
 - In the Enable FriendBox column decide if you want to display in the frontend the related Facebook block, which contains the count and the pictures of friends.
 - In the Count in FriendBox column, set the maximum number of friends that can be displayed in the related Facebook block. By default, it is set to 3. If you set zero value (0) or leave the field empty, then the default value is applied.

1. To save the configuration, click Save Config in the upper right corner of the page.

Now the social networking buttons you have created and the corresponding Facebook blocks will appear on the product pages of your web store. In the following section of this guide you can find the detailed description and illustrations of how these buttons look and work.

Facebook Open Graph 2.0 Extension: Web Store Customer Experience

When the Facebook Open Graph 2.0 extension is successfully installed and all configuration is done, the social networking buttons will be displayed on each product page in the frontend, along with the Facebook blocks providing the information about other Facebook users and friends who clicked your social networking buttons for the product (if set to be displayed). Information provided in the blocks depends on the customer who is logged in to Facebook and whether his or her friends have performed some actions with your app (that is clicked your social buttons). The following situations are possible (in this example, the Want and I own this social networking buttons were added) :

C

1. customer is not logged in to Facebook. See Figure 183.



Figure 183. Product page for a customer who is not logged in to Facebook

Customer is

- 2 logged in to Facebook, but none of the customer's friends wants or owns the product. See Figure 184.



Figure 184. Product page a customer who is logged in to

Customer is

Facebook, but none of his or her friends wants or owns the
product

- 3 logged in to Facebook, but he or she has not performed any action with the app yet.
See Figure 185.

Design and Content

Customer is



Customer is

Figure 185. Product page for a customer, who is logged in to Facebook, but he or she has not performed any action with the app yet

4. logged to Facebook, and his or her friends have already performed some action with the app. See Figure 186.

Customer is



Figure 186. Product page for a customer, who is logged to Facebook, and his or her friends have already performed some action with the app

Customer is

14 Promotions

This chapter describes a variety of ways to promote your products.

Overview

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

Up-selling, Related Products, and Cross-selling

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

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

Up-Sells

The up-sell products appear in the Product Information page under the Product Description, as shown in Figure 187. This example presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.



The screenshot shows a product page for the Microsoft Natural Ergonomic Keyboard 4000. The main product is displayed with its image, name, availability, price (\$99.99), and a 'Quick Overview' section. Below the main product, there is a 'Product Description' section. At the bottom, a section titled 'You may also be interested in the following product(s)' displays three up-sell products: the Logitech diNovo Edge Keyboard, a Computer, and a Gaming Computer. An orange arrow points to the first up-sell product, the Logitech diNovo Edge Keyboard.

Microsoft Natural Ergonomic Keyboard 4000
[Be the first to review this product](#)
 Availability: In stock.
\$99.99
 Qty: [Add to Cart](#) OR [Add to Wishlist](#)
[Add to Compare](#)

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

Double click on above image to view full picture

Product Description

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

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

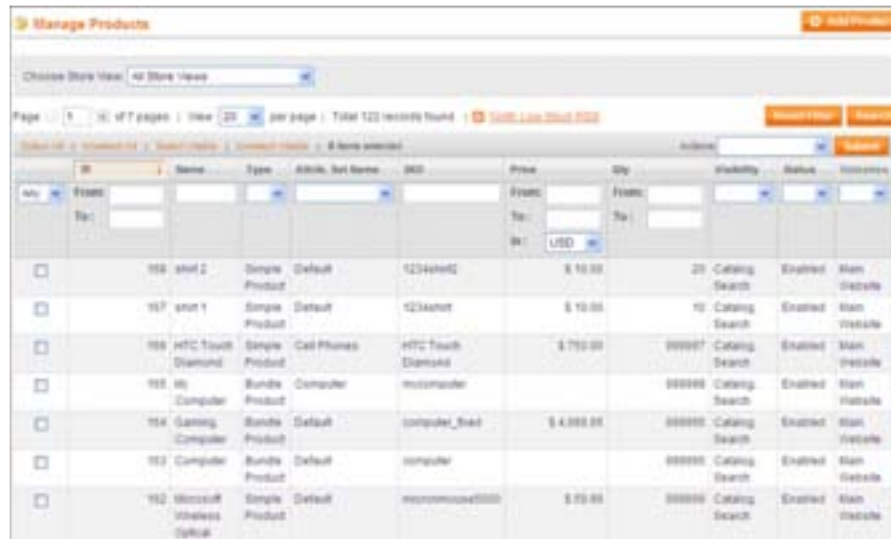
		
Logitech diNovo Edge Keyboard	Computer	Gaming Computer
\$239.99	From: \$447.99 To: \$4,477.92	From: \$4,999.95 To: \$6,348.95

Figure 187 Up-Sell Products

To add Up-sells to a product:

Promotions

1. In the Admin Panel select Catalog > Manage Products to display a list of products, as shown in Figure 188.



Name	Type	Attributes	Price	Qty	Status
shirt 2	Single Product	Default	\$ 10.00	20	Catalog Search
shirt 1	Single Product	Default	\$ 10.00	10	Catalog Search
HTC Touch Diamond	Single Product	Cell Phones	\$ 750.00	999997	Catalog Search
My Computer	Bundle Product	Computer		99999	Catalog Search
Gaming Computer	Bundle Product	Default	\$ 4,000.00	99999	Catalog Search
Computer	Bundle Product	Default		99999	Catalog Search
Microsoft Wireless Default	Single Product	Default	\$ 10.00	99999	Catalog Search

Figure 188. Manage Products Page

2. Click the Edit link which appears on the right side of the row of the product for which you want to define Up-sells. The page shown in Figure 189 is displayed:



Product Information	General
Name *	shirt 2 (STORE VIEW)
Qty *	1234567890
Weight *	0.0000
Default Category	
Status *	Enabled
Tax Class *	Taxable Goods
URL Key	shirt 1
Visibility *	Catalog Search
Active Gift Message	Use config
Manufacturer	
Cost	
Set Product as New from Date	

Figure 189. Edit Product Page

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

ID	Name	Type	Attribute	Status	Availability	Price
115	Unit 2	Simple Product	Default	Enabled	Catalog Search	\$ 10.00
116	Unit 2	Simple Product	Default	Enabled	Catalog Search	\$ 10.00
117	Unit 1	Simple Product	Default	Enabled	Catalog Search	\$ 10.00
118	HTC Touch Diamond	Simple Product	Cell Phones	Enabled	Catalog Search	\$ 100.00
119	My Computer	Bundle Product	Computer	Enabled	Catalog Search	\$ 4.999.00
120	Gaming Computer	Bundle Product	Default	Enabled	Catalog Search	\$ 4.999.00
121	Computer	Bundle Product	Default	Enabled	Catalog Search	\$ 4.999.00
122	Microsoft Wireless Optical Mouse 1000	Simple Product	Default	Enabled	Catalog Search	\$ 99.00

Figure 190. Products Selected as Up-Sell Products

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

4. Use the check box in each row or the products that you want to appear as up-sells to this product.
5. Click the Save button.

Related Products

Related Products are shown in the right column of your web store in a separate block.

The example in Figure 191 shows a mouse product that was added as a Related Product for a keyboard purchase.



Figure 191. Related Item

To add Related Products to a product:

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

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

4. Use the check box in each row of the products that you want to appear as Related Products to this product.
5. Click the Save button.

Cross-sells

Cross-sell products are shown in a block below the shopping cart products, as shown in Figure 192.



Figure 192. Cross-Sell Item

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

To add Cross-sell products to a product:

1. In the Admin Panel, select Catalog > Manage Products to display a list of products.
2. Click the Edit link that appears on the right side of the row of the product for which you want to define Related Products.
3. Select the Cross Sells tab in the panel on the left to display the Product Listing page.

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

4. Use the check box in each row of the products that you want to appear as Crosssells for this product.
5. Click the Save button.

Catalog and Shopping Cart Price Rules

There are two types of price rules in Magento CE: Catalog Price Rules and Shopping Cart Price Rules. Catalog Price Rules are applied to products before they are added to the shopping cart. Shopping Cart Price Rules are applied to products in the shopping cart.

Catalog Price Rules

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

- Defining the Catalog Price Rule Information, page 194, defines general information about the rule.
- Defining the Catalog Price Rule Conditions, page 196, defines the conditions that trigger the rule.
- Defining the Catalog Price Rule Actions, page 198, defines the actions that are executed when the conditions of this rule are met.

Defining the Catalog Price Rule Information

To create a Catalog Price Rule:

1. From the Admin Panel, select Promotions > Catalog Price Rules > Add New Rule button to display the page shown in Figure 193.

The screenshot shows a web application interface for creating a new catalog price rule. The form is titled 'General Information' and contains the following fields:

- Rule Name ***: A text input field containing 'Summer Sale'.
- Description**: A larger text area containing 'Summer T-shirt Sale - 10% off'.
- Status ***: A dropdown menu with 'Active' selected.
- Websites ***: A list box with 'Main Website' selected.
- Customer Groups ***: A list box with 'NOT LOGGED IN', 'General', 'Wholesale', and 'Retailer' selected.
- From Date**: A date input field with '07/1/09' and a calendar icon.
- To Date**: A date input field with '08/31/09' and a calendar icon.
- Priority**: An empty text input field.

Figure 193. Adding a New Catalog Price Rule

- 2 In the Rule Name and the Description fields, specify a unique name and a description for this Catalog Price Rule.
- 3 In the Status field, select Active.
- 4 In the Websites field, select the website to which this rule applies.
- 5 In the Customer Groups field, select one or more customer groups to which this rule applies.

- 6 In the From Date and To Date fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

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

Defining the Catalog Price Rule Conditions

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

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

To define Catalog Price Rule Conditions:

1. Select the Conditions option in the panel on the left to display the page shown in Figure 194.



Figure 194. Specifying Rule Conditions


- 2 The first rule appears by default: If ALL these Conditions are TRUE. It specifies whether the rules that you define must all be met or if any of them can be met (AND or OR) in order to trigger the rule's action. In our example, we wanted the discount to take effect when the product is a T-shirt and when the T-shirt costs over \$20. Therefore, leave the word ALL in the page above.
- 3 Click on the  icon to display a selection field and select the SKU option under Product Attributes from the dropdown menu. The page changes as shown in Figure 195.



Figure 195. Adding a SKU Condition

4. Click on the is link to display the comparison operator drop-down list shown in Figure 196.




Figure 196. Comparison Operator Drop-down list

5. Select the is one of comparison operator.
6. Click on the three dots to the right of the words is one of to display the value field, as shown in Figure 197.



Figure 197. Value Field

7. Click on the Chooser icon  to display a list of products from which you can select, as shown in Figure 198.

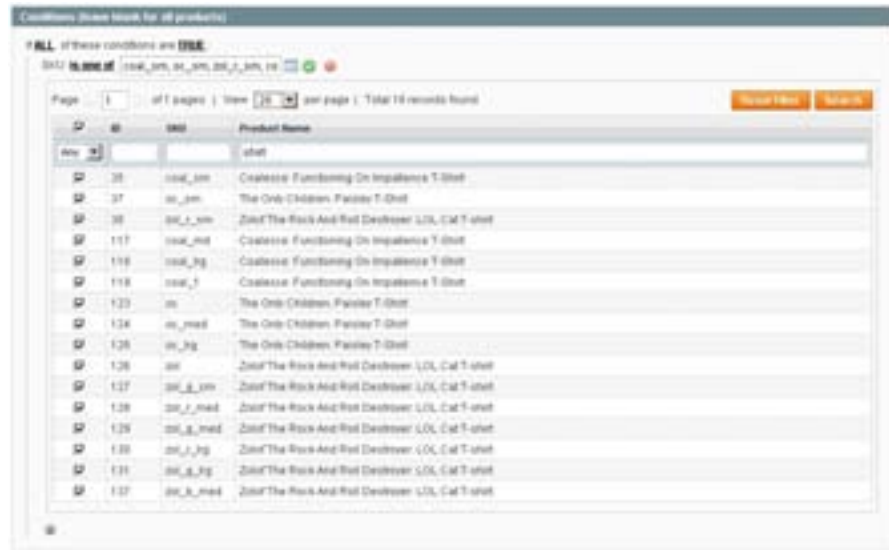


Figure 198. Item Selection

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



- 8 Select the check boxes of the products (T-shirts in this example) to which this rule is to apply.
- 9 Save this selection of products by clicking the Apply icon .
10. Now this rule specifies that it applies to T-shirts. You must now add the Condition that the product must cost over \$20 in order for the rule to apply. To do so, click on the  icon to display a selection field and select the Price option under Product Attributes from the drop-down list.
11. Click on the is link and select equals or greater than from the comparison operator drop-down list.
- 12 Enter the value 20.00 in the value field on the right to create the second Condition, as shown in Figure 199.

Figure 199. Two Conditions Specified

Defining the Catalog Price Rule Actions

Now that the conditions have been defined that trigger this rule, we must define the actions to be taken when the conditions are met. The following defines that the price is discounted by 10%.

To define Catalog Price Rule Actions:

1. Select the Actions option in the panel on the left to display the page shown in Figure 200.

Figure 200. Specifying Actions

2. The Apply drop-down list enables you to define whether the discount that is specified in the Discount amount field is a percentage or a fixed amount of the price of this product. It also enables you to define whether the discount amount is subtracted from the original price (By) or whether the Discount amount field actually defines the final price (To). For our example, in the Apply field, select By Percentage of the original price.
3. In the Discount Amount field, specify the value 10.00. This specification defines a final price that is a 10% reduction of the original price.

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

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

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

Shopping Cart Price Rules

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

The process of defining a Cart Price Rule consists of three stages:

- ❖ Defining the Cart Price Rule Information, page 199, defines general information about this rule.
- ❖ Defining the Cart Price Rule Conditions, page 201, defines the conditions that trigger the rule.
- ❖ Defining the Cart Price Rule Actions, page 201, defines the actions that are executed when the conditions of this rule are met.

Defining the Cart Price Rule Information

To create a Cart Price Rule:

1. In the Admin Panel, select Promotions > Cart Price Rules > Add New Rule button to display the page shown in Figure 201.

The screenshot shows a web form titled "General Information" for creating a Shopping Cart Price Rule. The form contains the following fields and options:

- Rule Name ***: A text input field.
- Description**: A large text area for a detailed description.
- Status ***: A dropdown menu with "Active" selected.
- Websites ***: A dropdown menu with "Main Website" and "Test Site" listed.
- Customer Groups ***: A dropdown menu with "NOT LOGGED IN", "General", "Wholesale", and "Retailer" listed.
- Coupon ***: A dropdown menu with "No Coupon" selected.
- Uses per Customer**: A text input field.
- From Date**: A date picker field.
- To Date**: A date picker field.
- Priority**: A text input field.
- Public In RSS Feed**: A dropdown menu with "Yes" selected.

Figure 201. Adding a New Shopping Cart Price Rule

1. In the Rule Name field and the Description field, specify a unique name and a description for this Shopping Cart Price Rule.
2. In the Status field, select Active.
3. In the Website field, select the website to which this coupon applies.
4. To specify that this rule only applies when a coupon code is used, select Specific Coupon in the Coupon drop-down list, and specify the code of the coupon that the customer must specify in the web store.

- 5 To specify that each customer can use this coupon only once, specify 1 in the Uses Per Customer field.

Tip: If you want to create a limited offer, the coupon can be limited to be used a certain number of times by selecting Specific Coupon in the Coupon drop-down list and specifying that number the Uses per coupon field.

- 6 In the From Date and To Date fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

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

- 7 By default, an announcement of this shopping cart price rule is included in your store's RSS feed. To suppress this announcement, select No in the Public in RSS Feed drop-down list.

Defining the Cart Price Rule Conditions

After you have set up the general information for the price rule, you create the Conditions that specify when the rule is triggered. The following example shows how to create a rule that has one condition, which checks when the shopping cart subtotal is over \$100.

To define Catalog Price Rule Conditions:

Select the Conditions option in the panel on the left and define a rule with the single condition "Subtotal equals or greater than 100," as shown in Figure 202.



Figure 202. Shopping Cart Price Rule Condition

Defining the Cart Price Rule Actions

Now that the condition has been defined that triggers this rule, you must define the actions to be taken. The following defines that 10% is reduced from the product's original price.

To define Cart Price Rule Actions:

1. Select the Actions option in the panel on the left to display the page shown in Figure 203.

The screenshot shows a form titled "Update prices using the following information". It contains several fields for configuring a price rule action:

- Apply:** A dropdown menu with "Percent of product price discount" selected.
- Discount amount *:** A text input field containing the value "10".
- Maximum Qty Discount is Applied to:** A text input field containing the value "0".
- Discount Qty Step (Buy X):** An empty text input field.
- Free shipping:** A dropdown menu with "No" selected.
- Stop further rules processing:** A dropdown menu with "No" selected.

Figure 203. Specifying Shopping Cart Price Rule Actions

2. The Action tab has two important sections. The first one controls the discount. In the Apply field, select Percent of product price discount.
3. In the Discount amount field, specify 10 to indicate that 10% is reduced from the product's original price.

Tip: Other options, not related to this example, are available, such as: Fixed amount discount, Fixed amount discount for whole shopping cart, and Buy X get Y free.

4. In the Maximum Qty Discount is Applied to field, specify the maximum quantity of products to which this discount can be applied. If you enter 5 in this field, then the first five products of

this type purchased in the same shopping cart get the 10% discount and the sixth product of the same type does not get the discount.

- 5 In the Discount Qty Step (Buy X) field, specify how often the discount is applied. This field is not relevant to our example, so leave this field empty. If you enter 8 here, then a 10% discount is applied to all the products after the eighth product is added to the shopping cart. If more than eight items are added to the shopping cart, the ninth through 15th products do not get the discount until the 16th product is added to the shopping cart, at which point the discount is 10% for all 16 products. This discount continues for every factor of eight.
- 6 In the Free Shipping field, specify whether to combine the coupon amount with a free shipping offer, for only the products for which the coupon is valid or for the entire Order, when one of these products is in the shopping cart. This field is not relevant to our example, so leave the No value in this field.
- 7 After defining the coupon as described above, select the products for which the coupon is valid. In our example, the coupon discount applies to clogs. Define a condition that applies to the SKU of clogs, as shown in Figure 204.

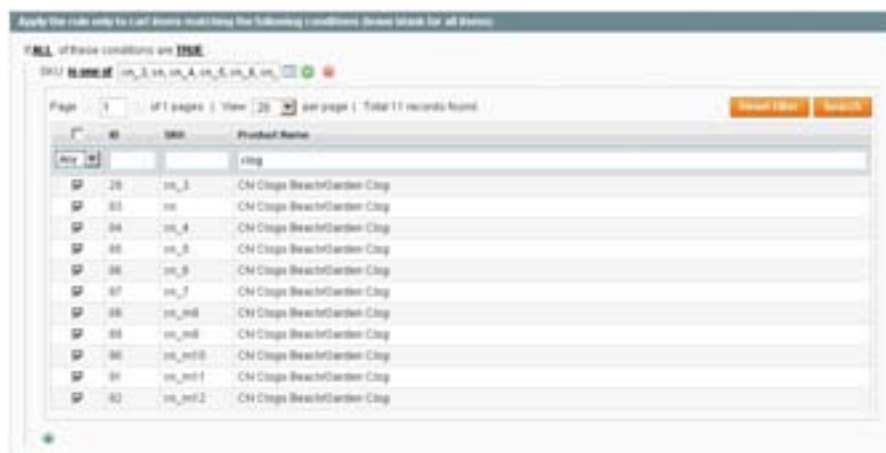


Figure 204. Specifying Products to Apply the Discount To

- 8 Click the Save Rule button.

Example: Defining a Buy 2 Get 1 Free Promotion

This section describes how to create another discount coupon with a Buy 2 get 1 free promotion. In this example, the web store is trying to push a digital camera as a family deal. This is a Shopping Cart Price rule.

To define a Buy 2 get 1 free promotion:

1. Define the Coupon Information, as described in “Shopping Cart Price Rules,” page 199, but leave the Coupon drop-down list selected to No Coupon. This selection specifies that the discount takes effect as soon as a customer adds the products to the shopping cart.

The screenshot shows the 'Update prices using the following information' section of a Magento promotion rule configuration. The 'Apply' dropdown is set to 'Buy X get Y free (discount amount is Y)'. The 'Discount amount' is set to 1, 'Maximum Qty Discount is Applied to' is 0, and 'Discount Qty Step (Buy >)' is 2. The 'Free shipping' and 'Stop further rules processing' options are both set to 'No'. Below this, the 'Apply the rule only to cart items matching the following conditions (leave blank for all items)' section shows a single condition: 'SKU is QC-2185' with a 'TRUE' status.

Update prices using the following information	
Apply	Buy X get Y free (discount amount is Y)
Discount amount*	1
Maximum Qty Discount is Applied to	0
Discount Qty Step (Buy >)	2
Free shipping	No
Stop further rules processing	No

Apply the rule only to cart items matching the following conditions (leave blank for all items)	
If ALL of these conditions are TRUE:	
SKU is QC-2185	TRUE

Figure 205. Buy X get Y Free Promotion

2. Do not define any conditions, because this rule is always applied to the Digital Camera. The deal is created for the Argus QC-2185 Quick Click 5MP Digital Camera available in the Magento Sample Data.
3. Click the Actions tab in the left navigation bar. In the Apply field, select the Buy X get Y free option.
4. In the Discount Amount field, specify 1. This is the number of units that are offered free.

5. In the Discount Qty Step field, specify 2. This is the number of units that must be purchased in order to receive the free unit.
6. In the bottom section, set up the condition to specify the SKU of the item that is featured in this promotion
7. Click the Save Rule button.

You can now send out your marketing message telling customers that if they buy 3 Argus QC-2185 Quick Click 5MP Digital Cameras one of them will be free.

Tip: It is good practice to test the effect of these rules yourself before trying them out on the public. Either use a discount code that only you know or assign your test customer to a testing customer group and limit the cart rules to only that customer group.

Auto-Generating Coupon Codes

For shopping cart price rules, you can auto-generate batches of coupon codes and track their usage.

Auto-Generating Coupon Codes Quick Reference

Batches of discount coupon codes can be generated and managed on the Manage Coupon Codes tab of the Shopping Cart Price Rule page (Promotions > Shopping Cart Price Rules > %your rule%). To make the tab appear, in the Coupon field select Specific Coupon, select the Use Auto Generation check box, and click Save and Continue Edit.

See Figure 206.

Figure 206. The Shopping Cart Price Rule page. Enabling the autogeneration of coupon codes.

The default settings for the format of auto-generated coupon codes are configured under System › Configuration › Promotions › Auto Generated Specific Coupon Codes.

For detailed description of the auto-generation of coupon codes, see Auto-Generating, Exporting, and Managing Coupon Codes, page 205.

Configuring Coupon Codes Auto-Generation Settings

You can set the default requirements for the coupon code format under System › Configuration › Promotions › Auto Generated Specific Coupon Codes. The following settings are available for configuring:

- ❖ **Code Length:** Defines a coupon code length excluding prefix, suffix and separators.

- ❖ **Code Format:** Defines a coupon code format. The options are: Alphanumeric (a combination of letters and numbers), Alphabetical (letters only), Numeric (numbers only).
- ❖ **Code Prefix:** Defines a value that will be appended to the beginning of all the coupon codes. If you do not want to use a prefix, leave this field blank.
- ❖ **Code Suffix:** Defines a value that will be appended to the end of all codes. If you do not want to use a suffix, leave this field blank.
- ❖ **Dash Every X Characters:** Defines the interval at which a dash (-) will be inserted in all coupon codes. If you do not want to use a dash, leave this field blank.

Note: Coupons whose codes differ only by dash character(s) are considered to be different coupons.

These settings can be overridden each time you need to generate a batch of coupons on the Shopping Cart Price Rule page.

Auto-Generating, Exporting, and Managing Coupon Codes

To generate and export a batch of coupon codes:

1. Log in to the Magento Admin Panel.
2. Navigate to Promotions › Shopping Cart Price Rules.
3. Select an existing rule or create a new one.
4. In the Coupon field select Specific Coupon.
5. Select the Use Auto Generation check box. Perform other rule configurations, if necessary.

Important Note: Shopping cart price rules with auto-generated coupon codes cannot be used in automated email reminders. If the shopping cart price rule

for which you set Specific Coupon in the Coupon field has been used in an automated email reminder rule, it will be automatically unassigned after saving the rule.

- 6 Click Save and Continue Editing. The Manage Coupon Codes tab appears. See Figure 207.
- 7 On the Manage Coupon Codes tab, specify the quantity of codes to be generated in the Coupon Qty field, correct the code format settings (if necessary) and click Generate. The generated coupon codes appear in the grid. For each coupon, you can see whether it has been used and how many times. To delete the coupon codes, select the check boxes in the first column, select Delete from the Actions drop-down menu, and click Submit.
- 8 To export the codes, filter the list of codes so that only the desired codes are displayed, choose the file extension in the Export to field, click Export, and save the file.

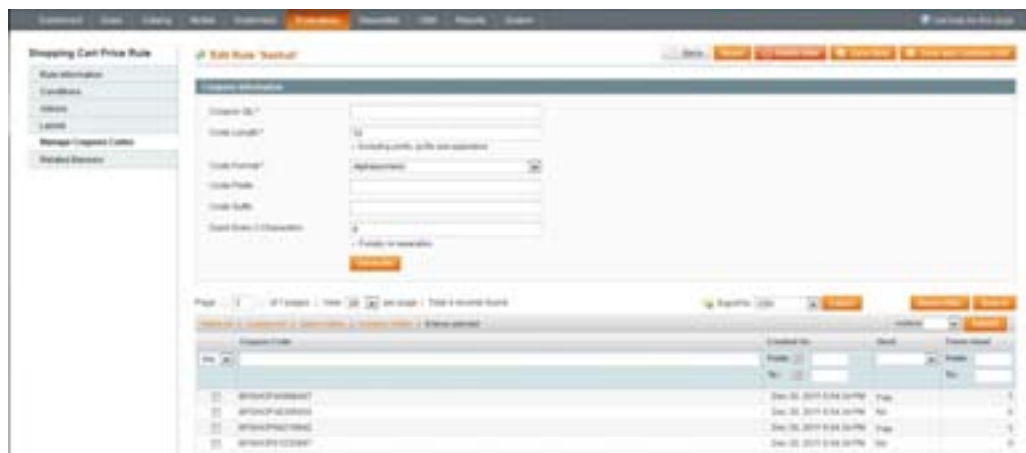


Figure 207. The Shopping Cart Price Rule page. Generating and managing coupon codes.

Tracking the Usage of Coupon Codes

Information about how often each coupon was used is displayed in the grid on the Manage Coupon Codes tab of the Shopping Cart Price Rule page. See Figure 207

above for illustration of the grid. You can also create detailed report about coupon usage in orders.

To create a report about the usage of coupons generated for a specific shopping cart price rule:

1. Navigate to Reports › Sales › Coupons. The Coupons Usage Report page opens.
2. In the Show Report For field select the scope, configure report filters. In the Shopping Cart Price Rule field select Specified and select the desired rule(s).
3. Click Show Report in the upper right corner of the page.

Special Prices

Special prices enable you to define a discounted price for a product for a specified period of time.

To define Special Price:

1. In the Admin Panel, select Catalog › Manage Products to display the list of products.
2. Click the Edit link on the right side of the relevant product's row.
3. Click the Prices tab in the left navigation panel.

Promotions

Prices Create New Price

Price * [USD] [GLOBAL]

Group Price

Website	Customer Group	Percent Discount	Action
Add Group Price			

Tier Price

Website	Customer Group	Qty	Percent Discount	Action
Add Tier				

Special Price [GLOBAL]

Special Price From Date

Special Price To Date

Price View * [GLOBAL]

Is Product Available for Purchase with Google Checkout [GLOBAL]

Apply MAP [WEBSITE]

Display Actual Price [WEBSITE]

Manufacturer's Suggested Retail Price [GLOBAL]

Figure 208. Prices Options

4. In the Special Price field, enter the special price.
5. Optionally, set Special Price From / To Date. If you leave these fields blank, the special price is applied immediately and applies until removed on the same page.
6. Click Save.

The special price is shown on the frontend as shown in Figure 209.



Microsoft Wireless
Optical Mouse 5000

Regular Price: ~~\$59.99~~

Special Price: \$49.99

[Add to Cart](#)

[Add to Wishlist](#)

[Add to Compare](#)

Figure 209. Special Price – Frontend

Tier Pricing

Tier Pricing is a promotional tool that enables a web store owner to price products differently when higher quantities are purchased. This is an effective way to move more merchandise and appeal to customers who buy more than one product at a time. When a customer adds a certain quantity of a product to their shopping cart, the price is automatically changed to reflect the discount.

To define Tier Pricing:

1. In the Admin Panel, select Catalog > Manage Products to display the list of products.
2. Click the Edit link on the right side of the relevant product's row.
3. Click the Prices tab in the left navigation panel.
4. Add tiers by clicking the Add Tier button. You can create as many tiers as you need.

The screenshot shows the 'Prices' configuration page in an admin panel. It includes fields for 'Price *' (set to 99.99), 'Cost' (set to 50.00), and 'Tier Price'. The 'Tier Price' section contains a table with columns: Website, Customer Group, Qty, Price, and Action. Two tiers are listed: one for quantity 5 and above with a price of 89.99, and another for quantity 10 and above with a price of 69.99. Below the table is an 'Add Tier' button. Other fields include 'Special Price', 'Special Price From Date', 'Special Price To Date', and 'Not available for purchase with Google Checkout'.

Website	Customer Group	Qty	Price	Action
All Websites [USD]	ALL GROUPS	5 and above	89.99	[Edit]
All Websites [USD]	ALL GROUPS	10 and above	69.99	[Edit]

Figure 210. Specifying Price Tiers

5. Click Save.

Tip: To apply a tier to multiple groups, but not all groups, create multiple tiers, each with the same Qty and Price information and select a different customer group in each.

The prices on the frontend take precedence from the highest to the lowest quantity. Therefore, if you have a tier for the quantity 5 and one for the quantity 10 and a customer adds 5, 6, 7, 8 or 9 items to the shopping cart, then the customer gets the discounted price that you specified for the quantity 5 tier. As soon as the customer adds the 10th item, the discounted price specified for the quantity 10 tier supersedes the quantity 5 tier and that discounted price (of 10) applies instead. After saving the product, it shows the Tier Pricing block on the frontend.

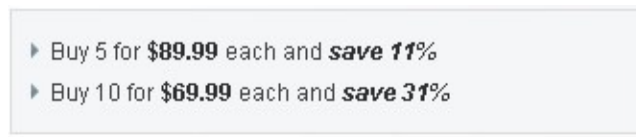


Figure 211. Tier Pricing Block- Frontend

On the product listing pages, the best available deal is displayed below the regular price, as shown in Figure 212.



Figure 212. “As Low As” Indication

Minimum Advertised Price

This section describes how a Minimum Advertised Price (MAP) policy can be applied in Magento CE.

Minimum Advertised Price – General Concept

If you have a minimum advertised price in the agreement with a manufacturer, you can still sell the merchandise at lower price, though this price will be hidden. It will not be visible to customers on the product page and will not be indexed by search engines. As a result, a price below the minimum advertised will not appear in any catalog of products collected from multiple web stores. The “crossed-out” price, which can be displayed on catalog and product pages, will be the manufacturer’s suggested retail price (MSRP). For storing the MSRP value, a new system attribute was added to the default attribute set.

An individual setting enables you to specify how the actual price is shown to customers: on clicking the Check for price link on a catalog or product page, when a product is added to the shopping cart, or before the order confirmation.

The MAP functionality can be applied to all product types except gift card products, and bundle products with dynamic pricing.

The MAP functionality only influences the way products prices are displayed on the frontend.

The following terminology is used in reference to this feature:

- ❖ Actual Price: The price that is specified in the Price of Special Price field on the product view page.
- ❖ Manufacturer's Suggested Retail Price (MSRP): The retail price as suggested by the manufacturer. The Actual Price is typically lower than MSRP.

Minimum Advertised Price – a Quick View

MAP can be enabled and configured under System > Configuration > Sales >

Minimum Advertised Price. See Figure 213.

Maximum Advertised Price

Enable MAP: No [WEBSITE]

Apply MAP (Default value): No [WEBSITE]
 - **Warning!** Applying MAP by default will hide all product prices on the frontend.

Display Actual Price: In Cart [WEBSITE]

Default Popup Text Message [STORE VIEW]
 Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page.
 You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.

Default "What's This" Text Message [STORE VIEW]
 Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page.
 You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.

Figure 213. MAP global settings

After MAP is enabled, the configuration on the product level becomes available with the Apply MAP, Display Actual Price, and Manufacturer's Suggested Retail Price fields. See Figure 214.

Prices [Create New Attribute]

Price * [USD] [WEBSITE]

Cost [USD] [WEBSITE]

Tier Price

Website	Customer Group	Qty	Price	Action
[Add Tier]				

Special Price [USD] [WEBSITE]

Special Price From Date [GLOBAL]

Special Price To Date [GLOBAL]

Is product available for purchase with Google Checkout: Yes [GLOBAL]

Apply MAP: Use config [WEBSITE]

Display Actual Price: Use config [WEBSITE]

Manufacturer's Suggested Retail Price [USD] [WEBSITE]

Figure 214. MAP settings on product level

When MAP is applied globally, all prices on the frontend are hidden; the Click for price links appear instead. If you specify the Manufacturer's Suggested Retail Price (MSRP), it will appear crossed-out. See Figure 215.



Figure 215. MAP is applied for the “Cuddle bear toy” and “Teddy bear toy” products. For the “Teddy bear toy,” the MSRP is specified, and it appears crossed out.

The way the actual price is displayed depends on the Display Actual Price setting. The following options are available:

- ❖ On Gesture (default value) - Clicking the Click for price link opens a pop-up window, containing the actual price and the information message. The actual price is shown on the last steps of the ordering process as well. See Figure 216.

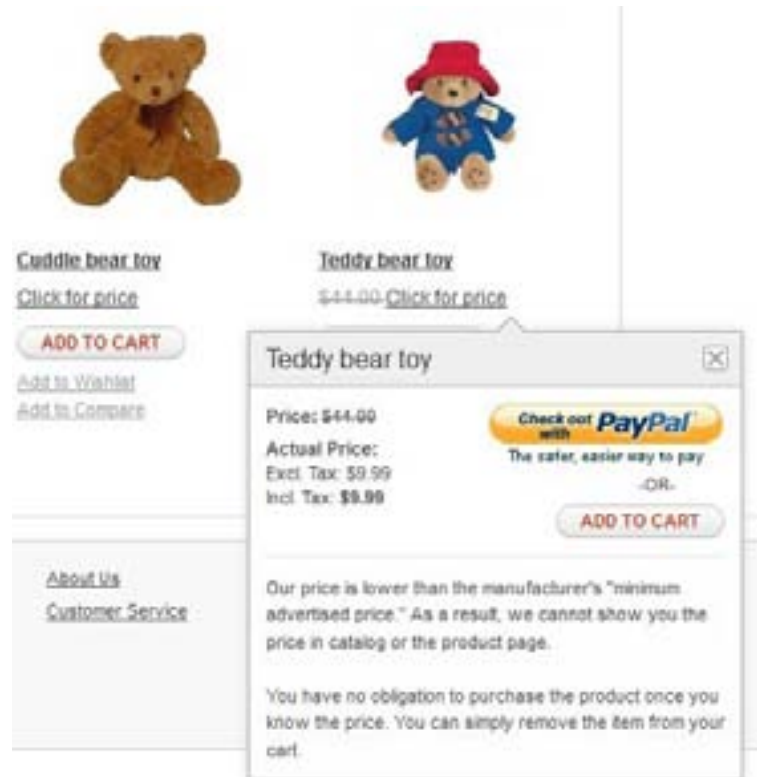


Figure 216. For the “Teddy bear toy” the Display Actual Price is set to “On Gesture.”

- ❖ In Cart - Clicking the Click for price link in a catalog redirects to the product page, where instead of the price or next to the crossed-out MSRP the following message is displayed: “To see product price, add this item to your cart. You can always remove it later.” The What’s this link is also included, which points to further explanations. The actual price of the product is displayed after it is added to the shopping cart. See Figure 217.



Figure 217. Product page on the frontend. Display Actual Price of the product is set to “In Cart.”

- ❖ Before Order Confirmation - Clicking the Click for price link in a catalog redirects to the product page, where the following message is displayed instead of the price or next to the crossed-out MSRP: “See price before order confirmation.” The What’s this link points to further explanations. The actual price and totals are displayed on the Order Review step of the one-page checkout, or on the order review pages of the Google checkout or PayPal checkout. See Figure 218.



Figure 218. Product page on the frontend. Display Actual Price of the product is set to “In Cart.”

For products that allow configuration on the frontend, and whose prices depend on the variant selected (the variants themselves can actually be either custom options or simple products with their own SKUs and stock management), the following logic is implemented if MAP is applied:

- ❖ MAP is applied to the main price; prices of the options, bundle items, and associated products (which add or subtract from the main price) are displayed normally.
- ❖ If a product does not have a main price, and its price is derived from the associated products' prices (such as in a grouped product), the MAP settings of the associated products are applied. Note that the MAP feature is not supported for bundled products with dynamic pricing.

Regarding other price settings, the MAP application logic is the following:

- ❖ If tier pricing is set, the tier price is displayed according to the Display Actual Price setting.
- ❖ If a special price is set, it is considered to be the actual price for MAP.

In the order management and customer management tools, as well as in the reports sections of the Admin Panel, only the actual price appears.

Setting Up MAP

MAP functionality can be configured at both the global and product levels.

On the global level, you can enable/disable the functionality, apply it to all products, define how the actual price is displayed, and edit the text of the MAP related messages and information tips on the frontend.

When MAP is enabled globally, product-level MAP settings become available. For a product you can choose to apply MAP, specify the MSRP, and define how the actual price is displayed.

Product-level MAP settings override the global ones.

Setting up MAP on the global level

By default the MAP functionality is disabled globally.

To enable and configure MAP:

1. In the Magento Admin Panel, select System, and click Configuration.
2. In the Current Configuration Scope in the upper left corner of the page, select the desired website.
3. In the left column under SALES, click Sales.
4. On the Minimum Advertised Price field set configure the following settings:

Option	Description	Scope
Enable MAP	Select Yes to enable the MAP.	Websit

		e
Apply MAP (Default Value)	<p>Applies MAP to all catalog products.</p> <p>If set to Yes, all prices in the catalog on the frontend are substituted with the Click for price links. On product pages, the prices are either substituted with the Click for price links or with the information about how to see prices, depending on the Display Actual Price setting.</p>	Websit e

<p>Display Actual Price</p>	<p>Defines how the actual price is displayed on the frontend. Select from the following:</p> <p>On Gesture - Clicking the Click for price link opens a pop-up window, containing the actual price. On all other stages of the ordering process (in the shopping cart, on the order review) the actual price is displayed normally.</p> <p>In Cart - Clicking the Click for price link in a catalog redirects to the product page. On the product page, the price is replaced with the following message: "To see price, add this item to your cart. You can always remove it later". The What's this link points to an information tip. The text of the information tip can be edited in the Default "What's This" Text Message field.</p> <p>The actual price is shown when customer adds the product to the shopping cart. It is also shown during the checkout as usual.</p> <p>Before Order Confirmation - Clicking the Click for price link in a catalog redirects to the product page. On the product page the price is replaced with the following message: "See price before order confirmation." The What's this link points to the information tip.</p> <p>The actual price is displayed on the Order Review step of the one page checkout or on the order review pages of the Google checkout or PayPal checkout. In the shopping cart, neither the prices nor the subtotals are displayed.</p> <p>When there is at least one item in the</p>	<p>Website</p>
-----------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	----------------

	shopping cart with Display Actual Price set to Before Order Confirmation, the order total is not shown in the cart. Instead, the message “Order total will be displayed before you submit the order” is shown.	
Option	Description	Scope
	The option selected defines how product prices are displayed in wishlists and comparison lists as well	
Default Pop-up Text Message	The text field for editing the information message displayed if the Display Actual Price field is set to On Gesture.	Store view

Default "What's This" Text Message	The text field for editing the text of the What's this information tip.	Store view
------------------------------------	-------------------------------------------------------------------------	------------

1. To save the configuration, click the Save Config button in the upper-right corner of the page.

Setting Up MAP on the Product Level

MAP settings on the product level become available once the MAP functionality is enabled.

For gift cards and bundle products with dynamic pricing, the MAP settings are not available.

To configure MAP settings on a product level:

1. Select Catalog and click Manage Products.
2. Open the product for editing.
3. On the Prices tab, the following MAP settings are available:

Option	Description
Apply MAP	Defines whether MAP is applied to the product.
Display Actual Price	Defines how the actual price of the product is displayed on the frontend. The value here overrides the corresponding global setting.
Manufacturers Suggested Retail Price	The price at which a manufacturer "suggests" to sell the product. If specified, it appears crossed-out on the catalog and product pages on the frontend.

4. To save the settings click Save or Save and Continue.

Note: If a product added to the shopping cart has MSRP specified, it will not be displayed crossed-out in the mini shopping cart or in the shopping cart side block.

How MAP Is Applied for Different Product Types

The following describes how MAP is applied for different product types.

Product type	MAP implementation
Simple, Virtual	The actual price is not shown on the catalog and product pages; it is displayed according to the Display Actual Price setting. The custom
Product type	MAP implementation
	options prices are displayed normally.
Grouped	Prices of the associated simple products are not shown on the catalog and product pages; they are displayed according to their Display Actual Price setting.
Configurable	The actual price is not shown on the catalog and product pages; it is displayed according to the Display Actual Price setting. The prices of the options are displayed normally.
Bundle with fixed price	The actual price is not shown in the catalog; it is displayed according to the Display Actual Price setting. The prices of the bundle items are displayed normally.
Downloadable	The actual price is not shown on the catalog and product pages; it is displayed according to the Display Actual Price setting. The prices of the links are displayed normally.

How MAP Is Applied for Different Price Settings

The following describes how MAP is applied for different price settings.

Price setting	MAP implementation
---------------	--------------------

Tier Price	<p>If tier pricing is set, the tier pricing message is not displayed in the catalog. On the product page a notification is displayed that indicates that the price can be lower when ordering more than a certain quantity, but the discount is displayed in percentages only. For associated products of a grouped product, the discounts are not displayed on the product page.</p> <p>The tier price is shown according to the Display Actual Price setting.</p>
Special Price	<p>If the Special price is specified, the special price is displayed according to the Display Actual Price setting.</p>

Product Group Price

The Product Group Price feature enables you to set different product prices for different customer groups on the product level. The functionality is aimed at improving the admin user experience with setting promotional prices for customer groups.

Terminology

- ❖ Regular price: The value of the price system product attribute (which by default corresponds to the Price field on the Prices tab of the Product Information page available under Catalog > Manage Products > %desired product%).
- ❖ Promotional price: A product price that is defined by any of the following system product attributes: `special_price`, `group_price`, or `tier_price`; or the resulting price after a catalog price rule is applied.

Note: The `group_price` attribute is a system product attribute which was added for storing the group price value.

Setting a Group Price for a Product

To set a group price for a catalog product:

1. Log in to the Magento Admin Panel.
2. Navigate to Catalog > Manage Products > %desired product%. The Product Information page opens.
3. On the Prices tab in the Group Price field click Add Group Price.
4. Select the target customer group and specify the price for the selected group. The Website column defines the scope of the Group Price field.

Note: For bundle products, the group price is specified as a discount percentage. If bundle items have their own group prices set for the same customer group, then the discount specified for the whole bundle product is applied to these group prices.

5. To save your changes, click Save or Save and Continue Edit.

Group Price Implementation Details

A group price can be specified for the following product types:

- ❖ Simple
- ❖ Configurable
- ❖ Virtual
- ❖ Bundle
- ❖ Downloadable

The list of product types for which a group price can be specified is defined in the settings of the group_price product attribute. The settings are available under

Catalog › Attributes › Manage Attributes › group_price. The list of product types, for which the attribute is used, can be configured in the Apply To field.

Note: For the Grouped and Gift Card product types, the Group Price functionality will not be applied even if these product types are selected in the Apply To field of the group_price attribute. In this case, for Grouped products, the Group Price field will not even be displayed on the Product Information page in the Admin Panel. For Gift Card products, the Group Price field will be displayed, but its value will not be considered by the system.

Displaying the group price in the frontend fits the general logic of price displaying in Magento. If besides the regular price, a product has promotional price(s), the lowest price value is displayed in the frontend. If a product custom option has price set as a percentage, then the lowest promotional price will be used as base for the calculation. The same logic is applied when the associated products (the options) of a configurable product have prices set as a percentage.

The following table illustrates how the minimum promotional price logic is implemented. The table provides several examples, but it is not an exhaustive list of possible combinations.

Backend Price Settings	Price Displayed in the Frontend
Price = \$4 Special Price = \$5 Tier Price = \$3	For customers from the tier price group(s): \$4 As low as: \$3 For customers from other groups: \$4
Price = \$5 Special Price = \$3 Tier Price = \$4	For all customers: Regular Price: \$5 Special Price: \$3

Price = \$5 Special Price = \$3 Tier Price = \$4 Price after a catalog price rule applied = \$2	For customers from the catalog price rule group: Regular Price: \$5 Special Price: \$2 For customers from other groups: Regular Price: \$5 Special Price: \$3
Price = \$5 Special Price = \$4 Group Price = \$3	For customers from the price group: Regular Price: \$5 Special Price: \$3 For customers from other groups: Regular Price: \$5 Special Price: \$4

Important Note: When a group price is set for a product, then the catalog price rules for the corresponding customer groups are applied to the group price, not to the regular price.

Newsletters

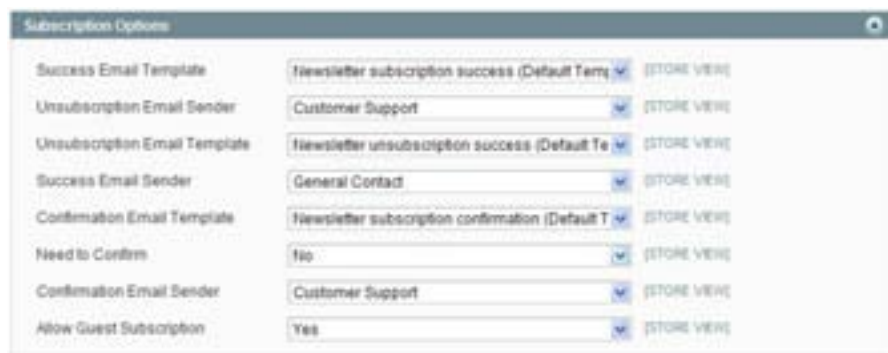
Magento CE provides a Newsletter feature, which enables store administrators to send newsletters to customers who have registered to receive them.

The first step in creating newsletters is to configure the newsletter settings for your site.

To configure newsletter settings on your site:

1. In the Admin Panel, select System › Configuration to display the configuration page.

- 2 In the CUSTOMERS area in the left navigation panel, select the Newsletter option and expand the Subscription Options area to display the page shown in Figure 219.



Setting	Value	Action
Success Email Template	Newsletter subscription success (Default Template)	[STORE VIEW]
Unsubscription Email Sender	Customer Support	[STORE VIEW]
Unsubscription Email Template	Newsletter unsubscription success (Default Template)	[STORE VIEW]
Success Email Sender	General Contact	[STORE VIEW]
Confirmation Email Template	Newsletter subscription confirmation (Default Template)	[STORE VIEW]
Need to Confirm	No	[STORE VIEW]
Confirmation Email Sender	Customer Support	[STORE VIEW]
Allow Guest Subscription	Yes	[STORE VIEW]

Figure 219. Newsletter Subscription Options

- 3 In the Need to Confirm field, select Yes to specify that each customer that registers for a newsletter will receive an email asking them to confirm their registration. This technique is called double opt-in, meaning that customers confirm that they want to receive a newsletter twice. This method reduces the number of customers that consider your newsletter as spam.

Newsletter Templates

Before sending a newsletter, create a newsletter template. You can create and save as many of these as required for any situation, whether it be an annual holiday newsletter or weekly product updates.

To create a new newsletter template:

- 1 In the Admin Panel, select Newsletter > Newsletter Templates to display a page listing the previously defined newsletter templates. You can edit an existing template or create a new one.
- 2 To add a new template, click the Add New Template button to display the New Newsletter Template page, as shown in Figure 219.

Figure 220. New Newsletter Template Page

3. In the Template Name field, specify a unique and indicative name for this template. This value is not visible for customers.
4. In the Template Subject field, specify the subject of the email to be sent to your customers.
5. In the Sender Name and Sender Email fields, specify the name and email of the sender of the email to be sent to your customers.
6. In the Template Content field, use the WYSIWIG editor to compose the body of the email. Note that this field is pre-filled with tags showing an unsubscribe link in the email. We recommend that you do not remove this link so that all emails that are sent enable your customers to unsubscribe from the newsletter.

7. Click Preview Template, to display the content with the formatting as it will be viewed by your subscribers.
8. After you have finished editing the template, click the Save Template button to save it.

Tip: After you have saved a template, a Save As button appears when you edit this template. The Save As button enables you to duplicate the template, so that you can make changes and save the template as a new template without affecting the original template. This can save you time because you will not need to reenter all the template information in order to create a new template. If you already have an existing template that is similar to the new template, simply edit the fields that you require, and then use the Save As button to create a new template.

Newsletter Queues

A newsletter that has many recipients must be sent in stages. The process of sending the newsletter is managed by a queue. After you start this queue, Magento CE sends the emails in packs.

To send your newsletter using a queue:

1. In the Admin Panel, select Newsletter › Newsletter Templates to display a list of newsletter templates.
2. In the Action drop-down list for the relevant template, select the Queue Newsletter option.
3. In the Queue Date Start field, specify when the newsletter will start being sent.
4. In the Subscribers From field, select one or more store views whose customers this newsletter will be sent to.
5. Review the template and parameters and then click the Save Newsletter button to schedule sending the newsletter.

Tip: To ensure delivery of your newsletters, it is recommended that you integrate your Magento CE installation with a third-party newsletter provider. These services are “whitelisted” by email service providers. Look for newsletter providers in the Magento Connect website.

Newsletter Reports

Three newsletter reports are provided in the Newsletter menu:

- ❖ **Newsletter Queue:** Shows the newsletter queues that have been defined and indicates their progress in sending emails.
- ❖ **Newsletter Subscribers:** Shows a list of customers that have subscribed to your newsletter. It also enables you to unsubscribe these customers manually.
- ❖ **Newsletter Problem Reports:** Shows a list of errors that have occurred while sending the email. This Report enables you to remove the incorrect emails from the subscribers list.

15 Managing Orders and Customers

This chapter describes how to manage customer records and how to add orders from the backend.

Managing Customers

Viewing and Editing Customers

To view existing customers:

1. In the Admin Panel, select Customers > Manage Customers to display the Manage Customers page, as shown in Figure 221. The Manage Customers page contains a list of all the customers that opened accounts in your web store or were added using the Add New Customer feature.



Figure 221. Manage Customers Page

2. Click the Edit link on the right side of a customer's row to display the customer information page, as shown in Figure 222.

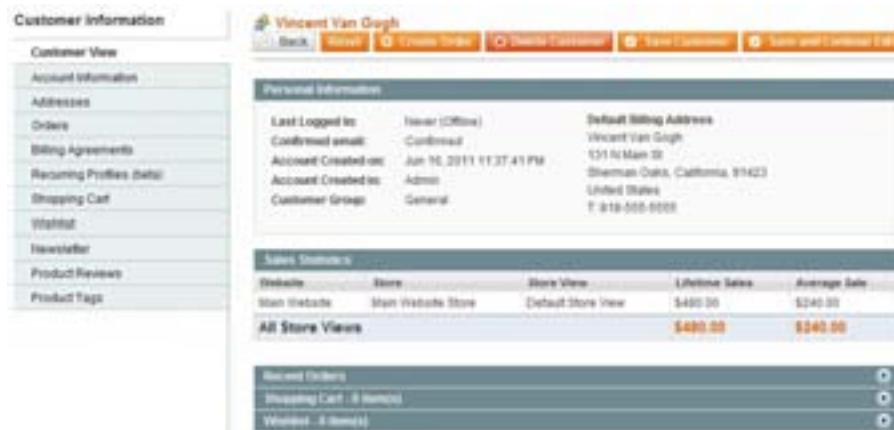


Figure 222. Customer Information Page

The tabs in the left panel provide a variety of types of information about the customer and for handling the relationship with a customer, such as: when the customer last logged in and out, addresses, ordering statistics, recent orders, current shopping cart contents, their last reviews, the newsletter to which they subscribed and so on.

Adding a Customer

Customers typically register themselves in your web store using the My Account link in the header of each page. In addition, you can use the following procedure to add a customer using the backend.

To add a new customer:

1. In the Admin Panel, select Customers > Manage Customers.
2. Click the Add New Customer button to display the New Customer page, as shown in Figure 223.

The screenshot shows the 'New Customer' page in the Magento CE admin interface. On the left, there's a sidebar with 'Customer Information' and 'Addresses' tabs. The main content area is titled 'New Customer' and has a 'Back' button. It contains two sections: 'Account Information' and 'Password Management'. The 'Account Information' section has fields for 'Account to Website' (dropdown), 'Group' (dropdown), 'Prefix' (text), 'First Name' (text), 'Middle Name/Initial' (text), 'Last Name' (text), 'Suffix' (text), 'Email' (text), 'Date of Birth' (text with a calendar icon), 'Tax/VAT Number' (text), 'Gender' (dropdown), 'Send Welcome Email' (checkbox), and 'Send Email' (text). The 'Password Management' section has a 'Password' (text) field and a checkbox for 'Send auto-generated password'.

Figure 223. New Customer Page

This page enables you to define basic identifying information about the customer and his/her various addresses. Many aspects of the information retained about a customer in Magento CE can be accessed by editing the customer's information, as described in "Viewing and Editing Customers," page 223.

3. The fields on this page are self-explanatory. Specify the customer's information and then click the Save Customer button.

Managing Customer Groups

The customer group to which the customer belongs determines which discounts are given to this customer, as defined in the Catalog Price Rules and Shopping Cart Price Rules (described in the "Catalog and Shopping Cart Price Rules," page 193), and the tax rule that is applied to that customer.

To create and edit customer groups:

1. In the Admin Panel, select Customers > Customer Groups to open the Customer Groups page, as shown in Figure 224.

ID	Group Name	Tax Class
1	General	Retail Customer
8	NOT LOGGED IN	Retail Customer
3	Retailer	Retail Customer
2	Wholesale	Retail Customer

Figure 224. Customer Groups Page

- 2 Do one of the following:
 - ❖ To create a new customer group, click Add New Customer Group.
 - ❖ To edit an existing customer group, click the row for the desired group.

The customer group editing page opens, as shown in Figure 225.

Group Information

Group Name *

Tax Class *

Figure 225. New Customer Group Page

- 3 Specify a unique name for this customer group (or modify the existing name).
- 4 Select a tax class to associate with this group.
- 5 Click Save Customer Group.

Checking Online Customers

You can check which customers are currently online and view their activity.

To view online customers:

In the Admin Panel, select Customers > Online Customers to display the Online Customers page, as shown in Figure 226.



Figure 226. Online Customers Page

Customer Reports

A variety of customer reports can be generated by selecting Reports > Customers in the Admin Panel.

The following describes the available customer reports:

- ❖ **New Accounts:** Shows the customers that have opened accounts in your web store during the period that you specify.
- ❖ **Customer by orders total:** Lists customers in descending order of money spent in your web store.
- ❖ **Customer by number of orders:** Lists customers in descending order of number of orders placed in your web store.

Importing and Exporting Customer Information

Another way to add customer records to Magento CE is by importing the data from a comma-separated values (CSV) file. The file that you upload must be in CommaSeparated Values (CSV) format. Most spreadsheet and database applications can read and create CSV files. This feature is convenient if you have existing customer information in another system and you want to bring it into Magento CE.

In order to import a CSV file into Magento CE, it must have certain characteristics. Specifically, each column heading must exactly match the Attribute Code for the attribute in that column. An easy way to get the correct column headings is to export the existing Magento CE customer data to a CSV file, then add or update the information to the CSV file before re-importing it into Magento CE.

Exporting Customer Data

To export customer information:

1. In the Admin Panel, select System > Import/Export > Export.
2. Select Customers from the Entity Type drop-down list. The system generates a list of entity attributes that are relevant to your customers.
3. By default, all attributes are exported to the CSV file. In the Entity Attributes list, select the Skip check box for any attributes that you want to exclude from the CSV file.
4. By default, all records are exported to the CSV file. Use the controls in the Filter column to limit the records that are exported.
5. Click Continue to export your selected product information to a CSV file.
6. Open the saved file in your favorite spreadsheet application and edit as needed.

Managing Orders and Customers

Importing Customer Data

With the Import feature, you can upload a file that contains the records for as many customers as you want.

To import a customer CSV file:

1. In the Admin Panel, select System > Import/Export > Import to open the Import page.
2. Select Customers from the Entity Type drop-down list.
3. Select one of the Import Behavior options from the drop-down list:
 - ❖ Append Complex Data: Adds new or edited products to your store's database. Magento CE will not create duplicate entries for existing products and customers included in your CSV file.
 - ❖ Replace Existing Complex Data: Completely replaces your existing data or portions thereof.
 - ❖ Delete Entities: Completely deletes your existing database or portions thereof.
4. Click Browse and locate the CSV file in your local computer's file system.

Note The total size of the CSV file must not exceed the maximum size for your environment (typically 32 MB) and must be saved with UTF-8 encoding. Check your spreadsheet or database application documentation for information about saving a CSV file with UTF-8 encoding.

5. Click Check Data to validate the uploaded file.
6. If the uploaded file is valid, a "File is valid!" response appears. Import your products or customers by clicking Import. If your file contains errors, Magento CE notifies you of the errors and enables you to skip the erroneous rows and importing the valid products or customers by clicking Import.

When the import is complete, the "Import was successfully done" message appears.

Managing Orders

The section "Managing Orders, page 62, introduces the procedures for handling the day-to-day order management tasks in your web store. This section assumes that you are familiar with that information.

See “Viewing the Orders in Your Web Store,” page 63 for a description of how to view and edit the Orders in your web store. This section goes into more details about the order life cycle in Magento CE.

Orders Terminology

This section describes some of the terms used for handling orders in Magento CE. In addition to creating orders, there are many features in the Magento CE backend that are part of the process of managing and fulfilling orders, such as creating invoices, shipments, and credit memos, and editing and cancelling orders.

Sales Order

When an order is created in a Magento CE web store, either in the frontend or in the backend, a sales order record is created to record this transaction. This sales order can be seen in the orders list by selecting the Orders option from the Sales menu in the backend.

This is only a temporary record. Payment has not yet been processed and the order can still be canceled.

Invoice

An invoice is a record of the receipt of payment for an order.

Note: In some cases, payment is automatically received during the creation of an Invoice.

Creating an invoice converts the temporary sales order into a permanent record of an Order, which can no longer be canceled.

Multiple invoices can be created for a single order, each containing as much or as few of the purchased products that you specify.

Shipment

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.

Credit Memo

A credit memo is a record of a refund. A product cannot be refunded until it has been paid (which means that it has been invoiced). This means that you are not able to create a credit memo before an invoice has been created.

The credit memo serves as a record of a refund, but it is not a record of the actual return of funds to the customer.

Creating New Orders

This section describes how to create an order using the backend, such as when an order is received on the phone.

To create a new order from the backend:

1. In the Admin Panel, select Sales > Orders.
2. Click the Create New Order button on the top right of the page to display the Create New Order page, as shown in Figure 227.

Name	Email	Telephone	ZIP/Postal Code	Country	State/Province	Payment Method
Test Customer	test@evanlabs.com	123-123-1234	99123	United States	California	English
John Doe	john.doe@evanlabs.com					English

Figure 227. Create New Order Page

3. Select a customer If you have multiple websites, stores, or store views, select the one to which this order applies. The Create New Order for <customer> page opens, as shown in Figure 228.

The screenshot shows the 'Create New Order for Test Customer in English' page. The page has a top navigation bar with 'Create New Order' and 'Test Customer' buttons. Below this is a sidebar with navigation links: 'Customer Group', 'Store', 'Website', 'Store View', 'Product', 'Category', 'Attribute', 'Option', 'Option Value', 'Option Value Label', 'Option Value Image', 'Option Value Video', 'Option Value Audio', 'Option Value File', 'Option Value Image Set', 'Option Value Video Set', 'Option Value Audio Set', 'Option Value File Set', 'Option Value Image Set Label', 'Option Value Video Set Label', 'Option Value Audio Set Label', 'Option Value File Set Label', 'Option Value Image Set Image', 'Option Value Video Set Image', 'Option Value Audio Set Image', 'Option Value File Set Image', 'Option Value Image Set Video', 'Option Value Video Set Video', 'Option Value Audio Set Video', 'Option Value File Set Video', 'Option Value Image Set Audio', 'Option Value Video Set Audio', 'Option Value Audio Set Audio', 'Option Value File Set Audio', 'Option Value Image Set Audio Label', 'Option Value Video Set Audio Label', 'Option Value Audio Set Audio Label', 'Option Value File Set Audio Label', 'Option Value Image Set Audio Image', 'Option Value Video Set Audio Image', 'Option Value Audio Set Audio Image', 'Option Value File Set Audio Image', 'Option Value Image Set Audio Video', 'Option Value Video Set Audio Video', 'Option Value Audio Set Audio Video', 'Option Value File Set Audio Video', 'Option Value Image Set Audio Video Label', 'Option Value Video Set Audio Video Label', 'Option Value Audio Set Audio Video Label', 'Option Value File Set Audio Video Label', 'Option Value Image Set Audio Video Image', 'Option Value Video Set Audio Video Image', 'Option Value Audio Set Audio Video Image', 'Option Value File Set Audio Video Image'. The main content area has tabs for 'Billing Address', 'Shipping Address', 'Payment Method', and 'Order Total'. The 'Billing Address' tab is active, showing fields for 'Customer Group', 'Email', 'First Name', 'Last Name', 'Address', 'City', 'State', 'Zip', and 'Phone'. The 'Shipping Address' tab is also visible, showing similar fields. The 'Payment Method' section has radio buttons for 'Credit Card', 'Credit Invoice', and 'No Payment Information Required'. The 'Order Total' section shows a subtotal of \$0.00 and a grand total of \$0.00. The 'Order Comments' section has a text area for comments.

Figure 228. Create New Order for <customer> Page

Note: If the customer does not already exist in your customer records, click Create New Customer on the first Create New Order page. You will need to complete all the address information.

4. Click the Add Products button to display the list of products, as shown in Figure 229.

ID	Product Name	SKU	Price		
100	HTC Touch Diamond	HTC Touch Diamond	\$750.00	<input type="checkbox"/>	
102	Microsoft Wireless Optical Mouse 5000	MicrosoftMouse5000	\$15.99	<input type="checkbox"/>	
101	Logitech Ultra Edge Keyboard	LogitechKeyboard	\$239.99	<input type="checkbox"/>	
103	Logitech Cordless Optical Trackman	LogitechTrackman	\$79.99	<input type="checkbox"/>	
105	Microsoft Natural Ergonomic Keyboard 4000	MicrosoftNatural	\$89.99	<input type="checkbox"/>	
107	30" Flat-Panel TFT-LCD Cinema HD Monitor	HD178LL	\$399.99	<input type="checkbox"/>	
106	16" Inscreen Flat-Panel LCD Monitor	HD162TG-TF	\$299.99	<input type="checkbox"/>	
108	Seagate 250GB HD - 5400RPM	250gb5400	\$69.99	<input type="checkbox"/>	
104	Seagate 500GB HD - 5400RPM	500gb5400	\$299.99	<input type="checkbox"/>	
103	Intel Core 2 Extreme QX6700 3.0GHz Retail	IntelCore2Extreme	\$2,349.99	<input type="checkbox"/>	
102	24" Inscreen Flat-Panel LCD Monitor	HD242TG-TF	\$599.99	<input type="checkbox"/>	
101	Intel C2D E6400 3.0GHz Retail	IntelC2D	\$199.99	<input type="checkbox"/>	
100	Western Digital 100GB HD - 7200RPM	100gb7200	\$299.99	<input type="checkbox"/>	
100	Western Digital 1TB HD - 7200RPM	1tb7200	\$399.99	<input type="checkbox"/>	

Figure 229. Product List for Creating Orders

- 5 Use the check boxes to select the products to be purchased, and click the Add Selected Product(s) to Order button.

Tip: If you selected one of the existing customers, then the left column shows a list of the products that this customer has in his/her cart, wish list, recently ordered, viewed, or compared. To add one those products to the order, select the required product and click Update Changes button.

- 6 Complete the other mandatory fields of the order. Mandatory fields are marked by an asterisk (*)
- 7 You can define many options for the order, such as choosing custom prices for products and applying discount codes.
- 8 After you have completed all the required order information, click the Submit Order button to display the order information page.
- 9 To confirm payment, click the Invoice button to generate an invoice for your review.

10. Review the invoice, and if all is well, click the Submit Invoice button at the bottom of the page.
11. When you are ready to ship the products, click the Ship button to generate a Shipment document.

Managing Orders and Customers

12. If applicable, you can add a tracking number received from the shipping service by clicking the Add Tracking Number button. Adding a tracking number enables customers to view the status of their shipment using the shipping carrier's website.
13. Review the shipment. You can modify the quantity to be shipped if only part of the order is ready.

The order status changes to Completed after all its products have been shipped.

14. Click the Email Copy of Shipment option to automatically send an email to notify the customer that the products were shipped.
15. Click the Submit Shipment button at the bottom of the page.
16. Click the Back button to return to the orders page, where you can create additional Orders if needed.

Clearing the Shopping Cart

If, at any time during the ordering process, the customer decides not to move forward with the order, you can clear the customer's shopping cart in either of two ways:

- ❖ Click the Clear Shopping Cart button on the Create New Order page (see Figure 230).



Figure 230. Clearing the Shopping Cart on the Create New Order Page

- ❖ Click the Clear Shopping Cart button on the Shopping Cart page (Customers > Manage Customers > %customer% > Manage Shopping Cart); see Figure 231.



Figure 231. Clearing the Shopping Cart on the Shopping Cart Page

Refunding

You can create a record of a product refund from an existing order by generating a credit memo.

To view the list of refunds made in your web store:

From the Sales menu, select the Credit Memos option to display the Credit Memos page, as shown in Figure 232.



Figure 232. Credit Memos Page

To refund a product from an existing order:

Note: You can create credit memos only for orders for which invoices were created. Without an invoice, an order is assumed not to be paid so that there is nothing to refund.

1. In the Admin Panel, select Sales > Orders to display a list of the existing orders.
2. Click the View link on the right side of the row of the desired order to display the order view page.
3. Click the Credit Memo button to generate a credit memo.
4. Scroll down to the Items to Refund area, and in the Qty to Refund field of each relevant product, specify the quantity of products to refund.
5. To specify that this product was actually returned to the web store, select the Return to Stock check box, as shown in Figure 233.

Managing Orders and Customers

Items to Refund							
Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount
Crocodile Functioning On Impatience T-Shirt	\$15.00	Order: 9 Invoice: 1	<input type="checkbox"/>	1	\$15.00	\$1.24	\$0.00
SKU: 118_311							
Size							
Small							
<input type="button" value="Generate Credit"/>							

Figure 233. Items to Refund

- 6 (Optional) Select the Email Copy of Credit Memo check box, as shown in Figure 234, to automatically send an email to the customer that the order has been refunded. You can also adjust the refund totals to match your business rules.

Refund Totals	
Subtotal	\$15.00
Tax	\$1.24
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
Total Refund	\$21.24

☐ Append Comments

☐ Email Copy of Credit Memo

Figure 234. Refund Totals

7. Click the Refund button at the bottom of the page. The total of the order from which this product was refunded is updated automatically.
8. Click the Back button to return to the orders page where you can create additional orders, if required.
9. Note: Refunding an order in Magento CE does not cause an actual payment refund. You must refund the payment on your own. The credit memo is only a record used to track the refunds and to provide proper values in the reports.

16 Managing Customer-Generated Content

Content

This chapter describes how to manage customer generated content, such as ratings, reviews, tags, and polls.

Managing Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to give their opinions, feedback, and comments about products.

Ratings and reviews appear in the frontend, as shown in Figure 235.



Figure 235. Ratings and Reviews Links on the Frontend

The quantity of stars indicates the satisfaction rating. You can click on the Review(s) link to display the actual reviews provided by customers or input your own Review, as shown in Figure 236.



Figure 236. Customer Reviews Frontend Interface

Generated Content

To add a review, the customer clicks on the Add Your Review link on the product information page to open the Write Your Own Review page, as shown in Figure 237.

Write Your Own Review

You're reviewing: Coalesce: Functioning On Impatience T-Shirt

How do you rate this product?*

	1 star	2 stars	3 stars	4 stars	5 stars
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Nickname*

Summary of Your Review*

Review*

[Submit Review](#)

Figure 237. Write Your Own Review Page (Frontend)

Adding a Custom Rating

By default, the customer can rate the quality, price, and value of a product. You might want to add custom ratings, to enable customers to rate such aspects as durability, warranty, and so on. This section describes how to create a new customized rating.

1. In the Admin Panel, select Catalog > Reviews & Ratings > Manage Ratings to display the Manage Ratings page, as shown in Figure 238.



Figure 238. Manage Ratings Page

2. Click the Add New Rating button to display the New Rating page, as shown in Figure 239.

New Rating Back Reset Save Rating

Tip: If you do not specify a rating title for a store, the default value will be used.

Rating Title

Default Value *

English

French

German

Rating Visibility

Visible In: Main Website Main Store
English
French
German

Figure 239. New Rating Page

3. In the Default Value field enter a name for this rating.
4. Click the Save Rating button.

Approving Reviews for Public Viewing

New reviews that are submitted by customers must be approved by the web store administrator in the backend before they appear on the frontend.

To view and approve new reviews:

1. In the Admin Panel, select Catalog > Reviews & Ratings > Customer Reviews > Pending Reviews to display the Pending Reviews page, as shown in Figure 240.



Pending reviews

Page 1 of 1 pages | View 25 per page | Total 1 records found | [Cancel Filter](#) [Search](#)

[Select All](#) | [Unselected All](#) | [Unselected All](#) | [Unselected All](#) | 0 items selected

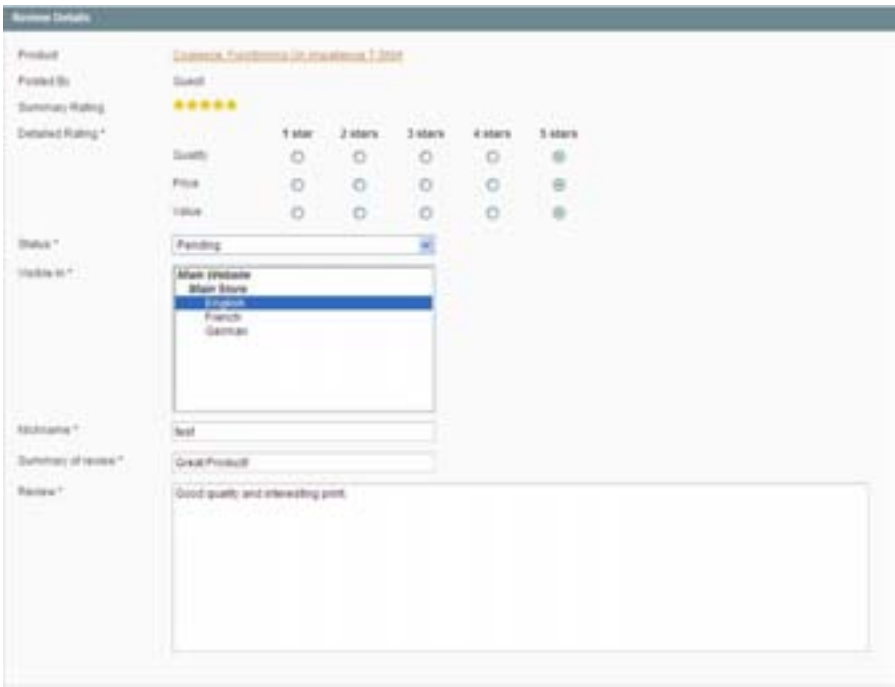
Actions: [Submit](#)

ID	Created On	Title	Nickname	Review	Votes in	Type	Product Name	Product ID	Action
114	Mar 24, 2018 11:55:12 PM	Great Product	test	Good quality and interesting point	5 stars	Guest	Cosmos Fundraising On Impulse T-Shirt	total_5	Edit

Figure 240. Pending Reviews Page

- 2 Click the Edit link on the right side of the relevant review's row to display the Review Details page, as shown in Figure 241.

Generated Content



Review Details

Product: [Cosmos Fundraising On Impulse T-Shirt](#)

Product ID: Guest

Summary Rating: ★★★★★

Detailed Rating: 1 star 2 stars 3 stars 4 stars 5 stars

Quality: ☐ ☐ ☐ ☐ ☒

Price: ☐ ☐ ☐ ☐ ☐

Value: ☐ ☐ ☐ ☐ ☐

Status: Pending

Votes in: [Alan Robinson](#) [Alan Stone](#) [French](#) [Garnage](#)

Nickname: test

Summary of review: Great Product

Review: Good quality and interesting point

Figure 241. Review Details Page

- 3 You can modify the review, if required.
- 4 In the Status field, change the Pending status to Approved or Not Approved.

Managing Tags

Tags can be assigned by customers directly in the frontend. A tag describes a specific property of a product, such as Cool, Valentine's gift and so on. Popular Tags serve as a descriptor that customers can select in order to view the products to which a specific tag has been assigned. Figure 242 shows an example of various tags as they appear in the web store.



Figure 242. Tags Display in the Frontend

Adding Tags

The number of tags that can be added to a product is unlimited and they can later be renamed or deleted. To add one or more tags to a product, the customer scrolls down on the product page to the Product Tags section, as shown in Figure 243.



Figure 243. Adding Product Tags (Frontend)

Managing Customer-

Tags must be separated by spaces, and phrases (two or more words that comprise a single tag) must be enclosed in single quotation marks (').Figure 243 shows what it looks like when a customer adds three tags:

- ❖ rock and roll
- ❖ t-shirt
- ❖ red

After a customer submits product tags, an administrator has to approve them on the backend so that they will appear on the frontend.

Approving Tags

Tags must first be approved by the backend administrator before they appear on the front-end. After a tag has been approved by the backend administrator, it can be used for other products and does not need to be approved again.

To approve a tag:

1. In the Admin Panel, select Catalog > Tags > Pending Tags to display the Pending Tags page, as shown in Figure 244.

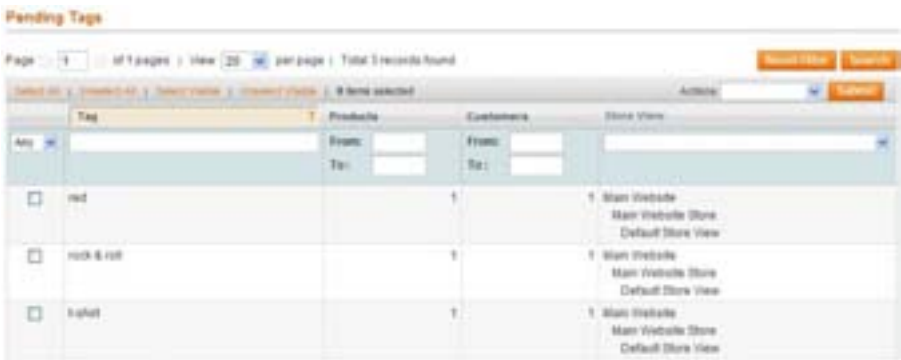


Figure 244. Pending Tags Page

Generated Content

This page shows a list of tags that have not yet been approved.

- 2 Use the check boxes in the left column to select all of the tags that you want to approve (or all of the tags that you want to disable).
- 3 In the Action drop-down list, select Change Status. The Status drop-down list becomes visible.
- 4 In the Status drop-down list, select Approve (or Disable).

Note: To modify a tag or view details about a tag, such as the product or products it was applied to, or the name of the customer who submitted it, click the row for that tag.

Note: If a customer has entered a tag that you do not want to ever see again, simply change the status to Disabled.

Managing Polls

Polls provide a powerful marketing tool for finding out the opinion of your customers about your products, store, customer service, or anything else.

It is very simple to create a poll. Figure 245 shows an example of how a poll appears in the frontend.



The image shows a web interface for a community poll. At the top, there is a header with a group of three people icon and the text "COMMUNITY POLL". Below this, the poll question "What is your favorite color" is displayed. Under the question, there are four radio button options: "Green", "Red", "Black", and "Magenta". At the bottom right of the poll area, there is a blue button labeled "Vote".

Figure 245. Poll on the Frontend

A poll occupies only a small amount of space on your store pages and is shown in the right column by default. Poll results are immediately displayed to the customer after the customer submits an answer, as shown in Figure 246.

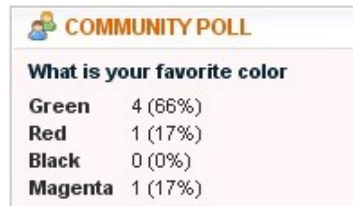


Figure 246. Poll Results

To create a poll:

1. In the Admin Panel, select CMS > Polls to open the Poll Manager page, which shows a list of existing polls.
2. Click the Add New Poll button in the top right corner of the page to display the New Poll page, as shown in Figure 247.

A screenshot of the 'New Poll' page. At the top, there are buttons for 'Back', 'Reset', and 'Save Poll'. Below these is a 'Poll information' section. It contains three fields: 'Poll Question *' (a text input field), 'Status' (a dropdown menu with 'Open' selected), and 'Visible In *' (a list box with 'Atan Website', 'Atan Store', 'English', 'French', and 'German' listed).

Figure 247. New Poll Page

3. In the Poll Question field, enter the question that your customer will be asked.

4. In the Status field, specify whether the poll is Open or Closed. The status of the poll is Open by default, which means that it appears in your store. If you do not want it to appear in your store, select the Closed option.
5. Select one or more stores that you want the poll to appear in.
6. Click the Poll Answers option in the left panel to display Assigned Answers page.
7. Click the Add New Answer button to add possible answers to your question that can be selected by customers, as shown in Figure 248.

The screenshot shows the 'New Poll' interface. At the top, there are buttons for 'Back', 'Reset', and 'Save Poll'. Below this is a section titled 'Assigned Answers'. It contains two rows of input fields. Each row has an 'Answer Title' field, a 'Votes Count' field (with a default value of 0), and a 'Delete' button. At the bottom of the section is an 'Add New Answer' button.

Figure 248. Assigned Answers Page

8. In the Answer Title field, specify the text of the answer to appear in your store for customers to select.

Generated Content

9. To influence the poll results in advance, you can add votes to the count in the Votes Count field, which is 0 by default.
10. Repeat steps 7 through 9 for each answer that you want to appear in this poll.
11. Click the Save Poll button.

Managing Customer-

Customers can answer a poll only once and you can view the results in the backend by clicking on the row for the poll in the Poll Manager page. If you have multiple polls open, they will cycle randomly in the frontend, meaning customer may see a different poll every time they refresh a frontend page.

Editing a Poll

After a poll has been created, you can edit it by clicking on the roll for the poll in the Poll Manager page (CMS > Polls).selecting the Poll Manager option from the CMS menu.

To close the poll so that it no longer appears in the store, change the Status field to Closed in the Poll information section.

To see the votes that have been tallied for each answer, click the Poll Answers option in the left panel to display the number of votes in the Vote Count field, as shown in Figure 249.





Assigned Answers		
Answer Title: *	Layered Navigation	
Votes Count: *	1899	
Answer Title: *	Price Rules	
Votes Count: *	1340	
Answer Title: *	Category Management	
Votes Count: *	724	
Answer Title: *	Compare Products	
Votes Count: *	762	

Figure 249. Poll Results (Backend)

17 Monitoring and Improving the Store

This chapter describes how to monitor and improve your web store by using reports, search terms, synonyms, redirects, and Google Analytics

Reports

This section describes some of the most important reports in Magento CE. This section first provides a full description of how to generate a Sales Report and a brief description of other important reports.

Generating Reports

Magento CE provides a variety of reports that you can access at any time. To see the reports that you can generate in Magento CE, from the Reports menu, select a type of report and then select a specific report of that type.

Some report pages have filter controls that enable you to narrow the scope of the report, as shown in Figure 250.

The image shows a screenshot of the 'Total Shipped Report' filter controls in the Magento CE admin interface. At the top, there is a title 'Total Shipped Report' and a 'Show Report' button. Below this is a dropdown menu set to 'Show Report For: All Websites'. A 'Filter' tab is selected. The filter section contains several controls: 'Match Period To' is set to 'Order Created Date'; 'Period' is set to 'Day'; 'From' and 'To' are date pickers; 'Order Status' is set to 'Any' with a subtext 'Apply to Any of the Specified Order Statuses'; and 'Empty Rows' is set to 'No'.

Figure 250. Report Filter Controls

- ❖ The Show Report For drop-down list enables you to select the store view or website (or all websites) to report on.
- ❖ The Match Period To drop-down list enables you to select which records to report on, based on either the order creation date or the order modified date.
- ❖ The Period drop-down list enables you to aggregate the report data into rows for each day, month, or year within your report From and To dates.
- ❖ Use the From and To calendar controls to determine the start and end dates that will be covered by the report.
- ❖ For Order Status, select Any to include all orders, or select Specified to select one or more order status values from a list.

Monitoring and Improving the Web Store

- ❖ The Empty Rows drop-down list enables you to select whether to include date period rows that have no data.
- ❖ The Show Actual Values drop-down list enables you to select whether to display actual (Yes) or projected (No) values. Projected values are based on estimates of amounts to be paid.

When you are finished making filter selections, click Show Report (or Refresh, in some reports) to generate the report. To export the report information shown on the screen, select the CSV (Comma Separated Values) option or the Excel XML option from the Export to drop-down list, and click Export.

Refreshing Sales Report Statistics

To reduce the performance impact of generating sales reports (those that are available under Reports > Sales), Magento CE calculates and stores the required statistics for each report. When you generate a report, the report uses the stored statistics, rather than recalculating the statistics each time you generate a report.

The sales report statistics need to be refreshed in order for the reports to use the most recent data. Refreshing the sales report statistics is a manual process.

To refresh the Sales Report statistics:

1. In the Admin Panel, select Reports > Refresh Statistics to open the Refresh Statistics page, as shown in Figure 251.



Figure 251. Refresh Statistics Page

2. Use the check boxes on the left to select the reports for which you want to have the statistics refreshed.
3. In the Actions drop-down list, select the scope of the statistics to be refreshed:
Refresh Lifetime Statistics or Refresh Statistics for the Last Day.
4. Click Submit.

Available Reports

The following describes the reports that are available in Magento CE.

Report	Path	Description
Total Ordered	Reports > Sales >	Shows orders for the specified time period.

Monitoring and Improving the Web Store

Report	Path	Description
Orders		
Order Taxes	Reports > Sales > Tax	Shows taxes charged for orders in the specified time period; grouped by tax rate.

Total Invoiced vs. Paid	Reports > Sales > Invoiced	Shows amounts paid and unpaid for invoiced orders in the specified time period.
Total Shipped	Reports > Sales > Shipping	Shows orders shipped in the specified time period, grouped by carrier/method; includes shipping charge amounts.
Total Refunded	Reports > Sales > Refunds	Shows refunds applied to orders in the specified time period.
Coupons Usage	Reports > Sales > Coupons	Shows coupons used for orders in the specified time period, grouped by coupon code.
PayPal Settlement	Reports > Sales > PayPal Settlement Reports	Shows PayPal settlements for the specified time period. Click Fetch Updates to retrieve data from PayPal.
Products in Carts	Reports > Shopping Products in carts	Shows products that are currently in Cart > shopping carts.
Abandoned Carts	Reports > Shopping Cart > Abandoned Carts	Shows shopping carts that were started but then abandoned. Tip: This report enables you to contact the customers and offer them discounts or otherwise turn an abandoned cart into a conversion.
Products Bestsellers	Reports > Products > Bestsellers	Shows the products that were sold in the highest quantity in the specified time period.
Products Ordered	Reports > Products > Products Ordered	Shows all products that were ordered in the specified time period.
Most Viewed	Reports > Products > Most Viewed	Shows the products that were viewed the most times in the specified time period.
Low Stock	Reports > Products > Low Stock	Shows the products whose stock levels are low.
Downloads	Reports > Products > Downloads	Shows the number of purchases and downloads for each downloadable product.
New Accounts	Reports > Customers > New Accounts	Shows the new accounts that were created during the specified time period.
Customers by Orders Total	Reports > Customers > Customers by orders total	Shows the customers listed in descending order of total order amount.
Customers by Number of Orders	Reports > Customers > Customers by number of orders	Shows the customers listed in descending order of number of orders placed.
Customers Reviews	Reports > Reviews > Customers Reviews	Shows the customers listed in descending order of number of reviews contributed.
Products Reviews	Reports > Reviews > Products Reviews	Shows the products listed in descending order of number of reviews.
Customers Tags	Reports > Tags > Customers	Shows the customers listed with the number of tags each one has created.
Products Tags	Reports > Tags > Products	Shows the number of unique tags and total number of tags created for each product.
Popular Tags	Reports > Tags > Popular	Shows the number of times each tag has been applied.
Search Terms	Reports > Search Terms	Shows the terms that were submitted in the

Monitoring and Improving the Web Store

Report	Path	Description
--------	------	-------------

search tool.

Tip: If you see that the **Hits** field of a product shows a high number (meaning that customers search for it often), but the **Results** column shows a low number or zero, then you should review your product names and descriptions to promote products related to this keyword.

Search Synonyms and Redirects

The following shows you how to fine-tune Magento's search behavior. Two main options are provided:

- ❖ **Search Synonyms:** Misspelled search terms may mean missed opportunities for you. If you know that a frequently used search term is often misspelled by customers, and thus does not display results, you can add additional search terms.
- ❖ **Redirects:** You can specify that when a customer searches for a certain term that they are redirected to a specific page. Direct customers to a specific product page, a specific brand landing page, or an informational page. For example, the search term "Returns" can take customers directly to the Shipping Policy page.

The following example demonstrates how to add the misspelled search term "latop" so that the results are returned for the correct term, "laptop."

To add new search synonym and or redirection:

1. In the Admin Panel, select Catalog › Search Terms to display the Search page, as shown in Figure 252.

The screenshot shows a web application interface for managing search terms. At the top, there's a 'Search' header and a 'Add New Search Term' button. Below this is a table with columns: Search Query, Store, Synonym For, Number of Items, Synonym For, Redirect URL, Display in Suggested Terms, and Action. The table contains four rows of data:

Search Query	Store	Synonym For	Number of Items	Synonym For	Redirect URL	Display in Suggested Terms	Action
laptop	Store 1, Store 2, Store 3, English		8	laptop		Yes	Edit
note	Store 1, Store 2, Store 3, English		1	note		Yes	Edit
book	Store 1, Store 2, Store 3, English		2	book		Yes	Edit
phone	Store 1, Store 2, Store 3, English		1	phone		Yes	Edit

Figure 252. Search Page

Monitoring and Improving the Web Store

- Click the Add New Search Term button to display the New Search page, as shown in Figure 253.

The screenshot shows the 'New Search' page with the following fields:

- Search Query ***: A text input field containing 'laptop'.
- Store ***: A dropdown menu with 'English' selected.
- Synonym For**: A text input field containing 'laptop'.
- Redirect URL**: A text input field containing 'http://www.example.com'.
- Display in Suggested Terms**: A dropdown menu with 'Yes' selected.

Figure 253. New Search Page

- In the Search Query field, specify the incorrect spelling of the term ("laptop" in this example).
- In the Synonym For field, specify the correct search term that is defined in your web store ("laptop" in this example).
- In the Redirect URL field, specify the URL to which the customer is redirected when no results are returned for the search term.
- Click the Save Search button.

Google Analytics

Google Analytics is a free service provided by Google to help website owners find out more about the traffic on their website and about conversions. Magento CE supports both the following Google Analytics options:

- ❖ Page View Tracking: Enables you to see the origin from which your web store visitors linked to your store.
- ❖ E-commerce Tracking: Enables you to see which customers make purchases and what they buy.

You can sign up to this service at <https://www.google.com/analytics>. While signing up, a report is displayed showing your new Google Analytics account number in the following format: UA-XXXXXXX-1. Write this number down, because it is required for configuring Google Analytics in Magento CE.

To add Google Analytics tracking to Magento:

1. In the Admin Panel, select System › Configuration › Google API
2. Expand the Google Analytics section as shown in Figure 254.

Monitoring and Improving the Web Store



Figure 254. Google Analytics Options

3. In the Enable field, select Yes.

4. In the Account number field, specify the Google Analytics account number that you wrote down when you signed up for the service.

Tip: Magento supports native integration with Google Website Optimizer, which is another free service from Google that enables you to test different versions of page elements and to select the elements that provide the best conversion rates.

18 Keeping Your Store Healthy

Now that you have your own web store running and are selling products, do not forget to keep it in good condition. Make sure that your hosting provider performs regular file and database backups

Backups and Rollbacks

Magento CE enables you to perform different types of backups (backup of database, file system, or both) and to perform rollbacks automatically.

Backup and Rollback Quick Reference

The main tasks related to creating backups and restoring the system are performed in the Magento Admin Panel under System > Tools > Backups.

Files are compressed using the .gz and .tgz formats. Backup files are stored in the `var/backups` directory in your Magento file system. The content of the `/var/cache`, `/var/log`, `/var/session` and `/var/report` folders is excluded from the backup.

Creating and Managing Backups

To create a backup:

1. Log in to the Magento Admin Panel.
2. Navigate to System > Tools > Backups.
3. Click one of the following buttons, depending on the backup type you need to create:

- ❖ System Backup: Creates a complete backup of the database and the file system. On the next step you will have the possibility to choose whether to include the media folder to the backup.
 - ❖ Database and Media Backup: Creates a backup of the database and the media folder.
 - ❖ Database Backup: Creates a backup of the database.
4. The confirmation dialog box appears. If you agree to put the store into the maintenance mode for the time of backup creation, select the corresponding check box. After the backup creation is completed, the maintenance mode is turned off automatically. If you are creating a system backup, select the Include Media folder to System Backup check box if you want to include the `media` folder. Confirm the backup creation.

Database backup files are compressed using the `.gz` format. For the system backups and database and media backups, the `.tgz` format is used. Backup files are stored in the `var/backups` directory in your Magento file system. The files that are stored in the

`/var/cache`, `/var/log`, `/var/session` and `/var/report` folders are excluded from the backup.

Records about all created backups are listed in a grid on the Backups page. Deleting a record deletes the archive file as well.

Rolling Back the System

To roll back the whole system or the database:

1. In the Magento Admin Panel, navigate to System > Tools > Backups
2. The Backups page opens, where all previously created backups are listed in a grid. For the desired backup, click the Rollback link in the Action column. Note that all changes made since the backup creation will be lost after the rollback.

3. Confirm rolling back, specify your Magento Admin Panel account password, and choose whether you want to put your store into the maintenance mode for the time of rolling back. When restoring file system or database and media files you can choose to use the FTP connection.
4. After the rollback, you are redirected to the login page to log in to the Admin Panel.
5. Refresh cache types and rebuild required indexes. This can be done under System > Cache Management and System > Index Management, respectively.

Important note: Use the Rollback functionality with caution. Customers who are in the process of checking out when you start the rollback may not be able to complete the checkout.

19 Indexing

Indexing is how Magento transforms data such as products, categories, and so on, to improve the performance of your web store. As data changes, the transformed data must be updated—or

reindexed. Magento has very sophisticated architecture that stores merchant data (including catalog data, prices, users, stores, and so on) in many database tables. To optimize storefront performance, Magento accumulates data into special tables using indexers.

For example, suppose you change the price of an item from \$4.99 to \$3.99. Magento must reindex the price change to display it on your web store.

Without indexing, Magento would have to calculate the price of every product on the fly—taking into account shopping cart price rules, bundle pricing, discounts, tier pricing, and so on. Loading the price for a product would take a long time, possibly resulting in cart abandonment.

Index Management Page

The Index Management page enables you to perform actions on the various indexes that Magento maintains. To access the Index Management page, click System › Index Management.



Index	Description	Status	Update on Store	Status	Update Required	Updated At	Actions
Product Attributes	Index product attributes for layered navigation building	Update on Store	Completed	Yes	Never		Rebuild Index
Product Prices	Index product prices	Update on Store	Completed	Yes	Apr 10, 2013 5:10:10 PM		Rebuild Index
Catalog URLs, Rewrites	Index product and categories URLs, rewrites	Update on Store	Completed	Yes	Never		Rebuild Index
Category-Product	Indexed category-product association	Update on Store	Completed	Yes	Never		Rebuild Index
Catalog Search Index	Rebuild Catalog product full-text search index	Update on Store	Completed	Yes	Never		Rebuild Index
Stock Status	Index Product Stock Status	Update on Store	Completed	Yes	Never		Rebuild Index
Tag Aggregation Data	Rebuild Tag aggregation data	Update on Store	Completed	Yes	Never		Rebuild Index

Figure 263. Index Management Page

Indexing

The page is presented differently If you enabled flat catalog product options. For more information, see “Using Flat Catalog and Product Reindexing,” page 271.

The following figure shows an example of the Index Management page with the flat catalog product options enabled.

Index	Description	Mode	Status	Reindex Required	Reindexed At	Actions
[?] Product Attributes	Index product attributes for layered navigation building	Update on Save	Reindex Required	Yes	Never	Reindex Data
[?] Product Prices	Index product prices	Update on Save	Reindex Required	Yes	Apr 10, 2013 3:10:10 PM	Reindex Data
[?] Catalog URLs Rewrites	Index product and categories URLs rewrites	Update on Save	Reindex Required	Yes	Never	Reindex Data
[?] Product Flat Data	Reorganize flat product structure to flat structure	Update on Save	Reindex Required	Yes	Never	Reindex Data
[?] Category Flat Data	Reorganize flat category structure to flat structure	Update on Save	Reindex Required	Yes	Never	Reindex Data
[?] Category Products	Indexed category/products association	Update on Save	Reindex Required	Yes	Never	Reindex Data
[?] Catalog Search Index	Rebuild Catalog product full-text search index	Update on Save	Reindex Required	Yes	Never	Reindex Data
[?] Stock Status	Index Product Stock Status	Update on Save	Reindex Required	Yes	Never	Reindex Data
[?] Tag Aggregation Data	Rebuild Tag aggregation data	Update on Save	Reindex Required	Yes	Never	Reindex Data

Figure 264. Index Management Page with Flat Data Indexing Enabled

Understanding the Columns on the Index Management Page

The following table describes the columns on the Index Management page:

Column Name	Description
Index	Name of the indexer
Description	Description of the indexer
Mode	In the preceding figures, most of the indicated indexers are set to Update on Save, which means a reindex is required when a change is saved in the Admin Panel. To change this option, see “How to Reindex Manually,” below.
Status	Displays one of the following: Reindex Required if a change has been made that requires reindexing. If a check box and Reindex Required link appears in that row, you can manually reindex as discussed in “How to Reindex Manually,” below. Ready if the index is up-to-date.

Update Required	Indicates whether or not you must manually reindex. (The value in the Mode column indicates whether the indexer must be manually updated.)
Updated At	Displays the date and time an index was last manually updated, or Never if the index has never been manually updated.
Action	Displays a Reindex Data link. Click the link to reindex that option only.

How to Reindex Manually

For the indexers that require manual updates, you have the following options on this page.

The indexers that require manual updates display with a check box next to their name (Product Attributes, Tag Aggregation Data, and, optionally, Catalog Search Index).

Task	Steps
Manually reindex	<p>To manually update one or more indexers:</p> <p>To update more than one indexer at a time, select the check box next to its name. From the Action list, click Reindex Data and click Submit.</p> <p>To update one index only, click the Reindex Data link in the Action column on the right.</p>
Change the indexing mode	<p>By default, indexers that require manual updating are set to Update on Save which means reindexing occurs after a change is made in the Admin Panel.</p> <p>The other option is to manually reindex every time a change is made. (For example, if you change product attributes in the Admin Panel, you must</p>
Task	Steps

manually update the Product Attributes index.)

To change the indexing mode:

1. Select the check box next to one or more indexers to change.
2. From the Actions list, click Change Index Mode. This displays the Index Mode list.
3. From the Index Mode list, click the desired option.
4. Click Submit. The value in the Mode column updates to indicate your choice.

Using URL Rewrites

URL rewriting (sometimes referred to as request rewriting) enables you to access resources such as product pages, categories, and so on, by additional uniform resource identifiers (URIs).

For example, suppose your web store has a product named Microsoft Natural Ergonomic Keyboard 4000 assigned to the Computer Peripherals category. By default, the product can be accessed using a URL like

`http://www.example.com/peripherals/microsoft-natural-ergonomic-keyboard-4000.html`. URL redirect enables you to create an additional URL like

`http://www.example.com/great-keyboard.html`.

Using URL rewriting, you can choose a combination of:

- ❖ Custom, category, or product URL rewrite type
- ❖ Request path, which can be any valid URI (for example, for a seasonal promotion, you might want a product URL to end with `best-valentinesgift.html`)
- ❖ Target path, which specifies the actual path to the product or category (for example, for a promotion, you might want a category named `spring-sale`)

Note: The custom and target path options enable you to redirect to a custom path, such as a Content Management System (CMS) path. The target path must be valid; otherwise, the redirect results in a 404 (Not Found) error on your web store.

❖ Redirect type (determines how search engines rank the redirect) ○ None (useful if you don't want the customer to have to wait the additional time required to redirect)

○ Temporary (HTTP 302 (Found)) ○

Permanent (HTTP 301 (Moved

Permanently)) Note: Magento recommends

choosing a permanent redirect because search engines generally preserve the page's ranking.

A 302 (Temporary) redirect does not preserve a page's ranking. For more information, consult a resource such as seomoz.org or google.com.

Sample URL Rewrites

Magento CE enables you to create redirects to add additional URLs for items. You can do this, for example, to make items more attractive to buyers. You can create a redirect to any valid path, including paths you create in your CMS.

For example, you can change the following product URL:

`http://www.example.com/peripherals/microsoft-naturalergonomic-keyboard-4000.html`

and add another one such as:

`http://www.example.com/best-keyboard.html`

or you can create another URL for a category like:

`http://www.example.com/all-on-sale.html`

To create a category path like the following for a promotion, you must first create a path using the CMS or by other means.

`http://www.example.com/save-now/spring-sale`

URL Rewrite Option: Setting Category and Product URL Suffixes

By default, Magento enables web store customers to access products and categories with a URL that ends with `.html`. You can optionally change both the product and category URL suffix to any alphanumeric string.

The examples throughout this section use the default suffix, `.html`.

To optionally change the product and category URLs:

1. Log in to the Admin Panel as an administrator.
2. Click System > Configuration.
3. In the CATALOG group, click Catalog.
4. In the right pane, expand Search Engine Optimizations.
5. Enter valid values in the Product URL Suffix and Category URL Suffix fields.
6. Valid values are alphanumeric characters (a-z, A-Z, 0-9) or the underscore character (`_`).
7. Click Save Config at the top of the page.

Getting Started with URL Rewrites

To get started:

1. Log in to the Admin Panel as an administrator.
2. Click Catalog > URL Redirects. The following figure shows a sample URL Redirect Management page.

ID	Store View	Type	ID Path	Request Path	Target Path	Options	Action
431	Main Website Main Store German	System	product1000	electronics/all-phones/100-foam-diamond.html	catalog/product/view/id/100/category/9		0.00
430	Main Website Main Store German	System	product100	100-foam-diamond.html	catalog/product/view/id/100		0.00
429	Main Website Main Store German	System	product10027	electronics/all-computers/foam-your-meaty-computer.html	catalog/product/view/id/100/category/27		0.00
428	Main Website Main Store German	System	product100	my-computer.html	catalog/product/view/id/100		0.00

Figure 265. URL Redirect Management Page

The preceding figure shows the following sample URL rewrites that are created for the Magento sample data.

The following table discusses the meanings of the columns on this page.

Column	Description
ID	A unique identifier Magento assigns to the URL rewrite.
Store View	Name of the store with which the URL rewrite is associated.
Type	Typically displays either System (system, or Magento default, URL rewrites) or Custom) URL rewrites you configure.
ID Path	The system, or actual, URI of the product or category.
Request Path	The unique part of the URI for that redirect. The request path can be any URL-encoded string. For example, great-valentinesgift.html.
Target Path	The URI that identifies the product, category, CMS page, and so on. The target path you enter must be valid; otherwise, the redirect fails with a 404 (Not Found).

Options	<p>Displays one of the following:</p> <p>R if you chose a temporary (HTTP 302) redirect.</p> <p>RP if you chose a permanent (HTTP 301) redirect.</p> <p>Nothing if you chose to not redirect.</p>
Action	Click Edit in this column to edit or delete the redirect. (You can also click the row itself.)

Creating New URL Rewrites

This section discusses how to create new custom, product, or category URL redirects.

1. Complete the tasks discussed in “Getting Started with URL Rewrites,” page 267.
2. Click Add URL Rewrite.
3. From the Create URL Rewrite list, click one of the following:

Option	Description
For Category	<p>Redirect to a category page. Magento system category paths use the format <code>catalog/category/view/id/category-string</code></p> <p>You can optionally redirect to a custom CMS path if you have already set one up.</p>
For Product	<p>Redirect to a product page. Magento system product paths use the format <code>catalog/product/view/id/string</code> or <code>catalog/product/view/id/product-string/category/category-string</code></p> <p>You can optionally redirect to a custom CMS path if you have already set one up.</p>
Custom	Redirect to any valid path. To use this option, you must know the exact request and target path.

The bottom section of the page refreshes to reflect the choices available for the type of URL rewrite you selected.

4. Do any of the following:
 - Custom redirect: Enter the required information. For more information, see step 6.
 - Category redirect: Click the name of the category.
 - Product redirect: Click the name of the product.
5. For product redirect only: Optionally click the name of a category, or click Skip choosing category to let the product remain associated with its original category. You need to click a category name only if you want the URL redirect to go to a different category.
6. Enter the following information:

Option	Description
Type	Usually displays Custom.
Store	From the list, click the name of the store to which the URL rewrite applies.
Request Path	<p>Enter a unique path to identify the product or category. The path can be in any format that uses URL percent encoding. Examples:</p> <p>best-valentines-gift.html</p> <p>greatest-keyboard.html</p> <p>products-on-sale.html</p> <p>best/products/on/sale/now.html</p>
Option	Description

Target	Enter a request path in one of the following formats:
Path	<p>Custom redirect: Any valid path.</p> <p>Category redirect:</p> <p>System path: Unless you set up a custom path using the CMS, you should leave this field unchanged. By default, system category paths have a format like:</p> <p style="text-align: center;">catalog/category/view/id/<i>categorystring</i> o</p> <p>Custom path: Any valid path • Product redirect:</p> <p>System path: Unless you set up a custom path using the CMS, you should leave this field unchanged. By default, system category paths have a format like:</p> <p style="text-align: center;">catalog/product/view/id/string or</p> <p style="text-align: center;">catalog/product/view/id/productstring/category/cate</p> <p style="text-align: center;">gory-string</p> <p>Custom path: Any valid path</p>
Redirect type	<p>From the list, click:</p> <p>No</p> <p>Temporary (302)</p> <p>Permanent (301). Magento recommends choosing this option because search engines retain the page ranking.</p>
Description	Enter an optional description.

1. At the top right corner of the page, click Save.

The following figure shows a sample product permanent redirect that adds the URL <http://www.example.com/greatest-keyboard.html> to the English web site for a product whose ID is 159.

ID	Store View	Type	IS Path	Requested Path	Target Path	Options	Action
1004	Main Website Main Store English	Custom	product/119	greatest-keyboard.html	microsoft-natural-ergonomic-keyboard-4000.html	RP	Edit

Figure 266. URL Redirect Information

Verifying URL Rewrites

This section discusses how to verify that a sample product URL rewrite is displayed correctly on your Magento web store.

1. In the Admin Panel, click System > Index Management.
2. Click Select All at the top of the left column.
3. From the Actions list, click Reindex Data.
4. Click Submit. The following figure shows an example.

Index	Description	Index	Status	Options Required	Action
Product Attributes	Index product attributes for layered navigation building	Update on Save	Reindexed	Yes	Reindex Data
Product Prices	Index product prices	Update on Save	Reindexed	Yes	Reindex Data
Catalog URL Rewrites	Index product and categories URL rewrites	Update on Save	Reindexed	Yes	Reindex Data
Product Flat Data	Reorganize flat product attributes to flat structure	Update on Save	Reindexed	Yes	Reindex Data
Category Products	Reindex category/product association	Update on Save	Reindexed	Yes	Reindex Data
Catalog Search Index	Reindex category/product/full search index	Update on Save	Reindexed	Yes	Reindex Data
Stock Status	Index Product Stock Status	Update on Save	Reindexed	Yes	Reindex Data
Tag Aggregation Data	Reindex Tag aggregation data	Update on Save	Reindexed	Yes	Reindex Data

Figure 267. Verifying Product URL Redirect

5. Click Catalog > URL Rewrite Management. To open the URL Rewrite Management page.
6. Click a row corresponding to a product redirect. The following figure shows the example used in this section.

URL Rewrite Management

436 100 Records

Page 1 of 42 pages / View 20 per page / Total 832 records found

[Reset View](#) [Search](#)

ID	Store View	Type	Request Path	Target Path	Options	Action
1004	Main Website Main Store English	Custom	product159	greater-keyboard.html	micro-soft-natural-ergonomic-keyboard-4000.html	RP

7. Open a new browser window or tab page.
8. In the browser's location or address field, construct the URL to the product as follows:
 - o Start with the scheme (http:// or https://, then your web store's domain name, followed by /.
 - o Append to it the value of the Target Path field from the Admin Panel, followed by /.
 - o Append to it the value of the Request Path field.

For a Magento web store whose domain is <http://www.example.com>, the URL should look like the following:

<http://www.example.com/sale-keyboard.html>

1. Press ENTER. The following figure shows an example of a successful redirect.

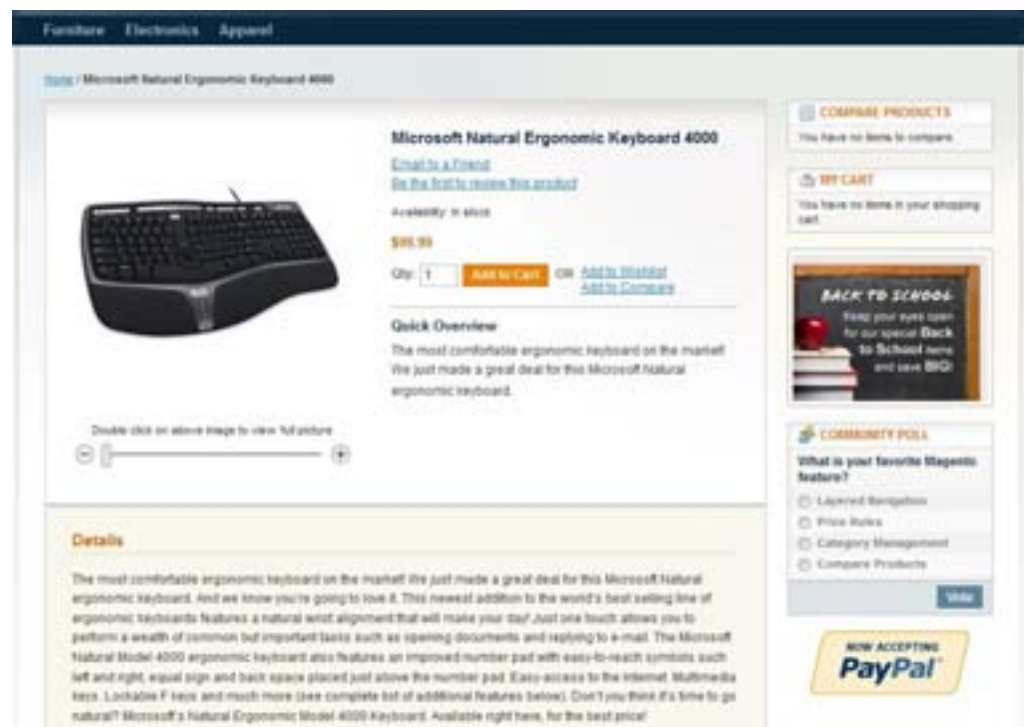


Figure 268. Successful Redirect

Note: If a 404 (Not Found) error appears, verify the target path precedes the request path and that each path is separated by one / character.

- 2 Optionally verify category and custom redirects the same way.

Editing or Deleting URL Rewrites

To edit or delete a URL rewrite:

1. Log in to the Admin Panel as an administrator.
2. Click Catalog > URL Rewrites. The URL Rewrite Management page opens.
3. Click the row of the URL redirect to edit or delete. To edit a URL redirect, you can also click Edit in the Action column.
4. To delete the URL redirect, click Delete. You are required to confirm the action. To edit a redirect, edit or change the information displayed on your screen. For additional information, see “Creating New URL Rewrites,” page 268.

Using Flat Catalog and Product Reindexing

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

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

Flat Catalog Prerequisite: Enabling Frontend Options

To enable flat catalog and product indexing:

1. Log in to the Admin Panel as an administrator.
2. Click System > Configuration.
3. In the CATALOG group, click Catalog.
4. In the right pane, click Frontend.
5. From the Use Flat Catalog Category list, click Yes.
6. From the Use Flat Catalog Product list, click Yes. The following figure shows an example.

The screenshot shows the 'Catalog' configuration page in the Magento Admin Panel. The 'Frontend' tab is selected. The 'Use Flat Catalog Category' and 'Use Flat Catalog Product' options are highlighted with a red box, both set to 'Yes'. The 'Save Config' button is visible in the top right corner.

Field	Value	Scope
List Mode	Grid (default) / List	[STORE VIEW]
Products per Page on Grid	9, 15, 30	[STORE VIEW]
Allowed Values	Comma-separated.	
Products per Page on Grid Default Value	9	[STORE VIEW]
Allowed Values	Must be in the allowed values list.	
Products per Page on List	5, 10, 15, 20, 25	[STORE VIEW]
Allowed Values	Comma-separated.	
Products per Page on List Default Value	10	[STORE VIEW]
Allowed Values	Must be in the allowed values list.	
Allow All Products per Page	No	[STORE VIEW]
Allowed Values	Whether to show "All" option in the "Show X Per Page" dropdown.	
Product Listing Sort by	Best Value	[STORE VIEW]
Use Flat Catalog Category	Yes	[GLOBAL]
Use Flat Catalog Product	Yes	[GLOBAL]
Allow Dynamic Media URLs in Products and Categories	Yes	[STORE VIEW]
Allowed Values	E.g. {{media url="path/to/image.jpg"}} {{skin url="path/to/picture.gif"}}. Dynamic directives parsing impacts catalog performance.	

Figure 269. Flat Index Frontend Options

7. In the upper right corner, click Save Config.

Verifying the Results of the Flat Catalog Configuration

This section discusses examples of both changes to individual products and changes to multiple products and categories at the same time.

Note: Magento recommends performing the tasks discussed in this section in a development environment first.

Verifying Flat Catalog Changes for a Single Product

To verify flat catalog changes for one product:

1. Log in to the Admin Panel as an administrator.
2. In a different browser tab page or window, open your web store's front page.
3. In the Admin Panel, click Catalog > Manage Products.
4. Choose a product to modify. This example uses the Nokia 2610 Phone.
5. Click the name of the product to edit it.
6. Click the General tab.
7. Append _DEMO to the value in the Name field. The following figure shows an example.

Nokia 2610 Phone (Cell Phones)

Back Reset Delete Duplicate Save Save and Continue Edit

General Create New Attribute

Name *	Nokia 2610 Phone_DEMO	[STORE VIEW]
Model *	2610	[GLOBAL]
SKU *	n2610	[GLOBAL]
Weight *	3.2000	[GLOBAL]
Manufacturer	Nokia	[GLOBAL]
Status *	Enabled	[WEBSITE]
Tax Class *	Taxable Goods	[STORE VIEW]
URL Key	nokia-2610-phone	[GLOBAL]
	<input checked="" type="checkbox"/> Create Permanent Redirect for old URL	
Visibility *	Catalog, Search	[STORE VIEW]
Set Product as New from Date		[GLOBAL]
Set Product as New to Date		[GLOBAL]
Country of Manufacture		[WEBSITE]

Figure 270. Changing an Attribute Value

- 8 Click Save.
- 9 View your web store.
- 10 Search for the product you edited or browse to the category that contains it.
- 11 If necessary, refresh the page to see the result of the change you made. The following figure shows an example.



Figure 271. Product Page Showing Updated Attribute

Verifying Flat Catalog Changes for Multiple Products

To verify flat catalog changes for multiple products:

1. Log in to the Admin Panel as an administrator.
2. In a different browser tab page or window, open your web store's front page.
3. In the Admin Panel, click Catalog > Manage Categories.
4. From the Choose Store View list, click the name of a store to view categories for that store.
(You can also click All Store Views).
5. In the left pane, click the name of an existing category.
6. Click Add Subcategory.

7. In the Name field, specify Demo category.
8. From the Is active list, click Yes.
9. Click Save Category.
10. Click the Category Products tab.
11. Click Reset Filter to display your products.
12. Select the check box of several products to add them to the new category. The following figure shows an example.

Demo category (ID: 36) Reset Table Category Save Category

General Information | Display Settings | Custom Design | **Category Products**

Page 1 of 5 pages | View 20 per page | Total 105 records found Reset Filter Search

<input type="checkbox"/>	ID	Name	SKU	Price	Position
				From To	From To
<input type="checkbox"/>	166	HTC Touch Diamond	HTC Touch Diamond	\$750.00	
<input checked="" type="checkbox"/>	165	My Computer	mycomputer		
<input checked="" type="checkbox"/>	164	Gaming Computer	computer_gamed	\$4,999.99	
<input type="checkbox"/>	163	Computer	computer		
<input checked="" type="checkbox"/>	162	Microsoft Wireless Optical Mouse 5000	micromouse5000	\$28.99	
<input type="checkbox"/>	161	Logitech 9110m Edge Keyboard	logitech9110m	\$238.99	
<input type="checkbox"/>	160	Logitech Cordless Optical Trackman	logitechcord	\$79.99	
<input checked="" type="checkbox"/>	159	Microsoft Natural Ergonomic Keyboard 4000	microsoftnatural	\$89.99	
<input checked="" type="checkbox"/>	158	Sony VAO 11.1" Notebook PC	VGN-TXW27N8W		
<input type="checkbox"/>	157	32" Flat-Panel TFT-LCD Cinema HD Monitor	W9179LL	\$599.99	
<input checked="" type="checkbox"/>	156	19" Widescreen Flat Panel LCD Monitor	W19525D-5F	\$399.99	
<input type="checkbox"/>	155	Seagate 250GB HD - 5400RPM	250gb5400	\$89.00	
<input type="checkbox"/>	154	Seagate 100GB HD - 5400RPM	100gb5400	\$299.00	
<input checked="" type="checkbox"/>	153	Intel Core 2 Extreme QX6700 3.0GHz Retail	intelcore2extreme	\$2,349.99	
<input type="checkbox"/>	152	24" Widescreen Flat Panel LCD Monitor	W24525-5F	\$699.99	
<input type="checkbox"/>	151	Intel C2D E6400 3.0GHz Retail	intelc2d	\$89.99	
<input type="checkbox"/>	150	Western Digital 500GB HD - 7200RPM	500gb7200	\$299.00	
<input type="checkbox"/>	149	Western Digital - 1TB HD - 7200RPM	1tb7200	\$399.00	
<input type="checkbox"/>	148	AMD A84 X2 3800+ 2.0GHz OEM	amda84	\$89.99	
<input checked="" type="checkbox"/>	147	22" Symmaster LCD Monitor	2250w	\$399.99	

Figure 272. Demo Category

13. Click Save Category.
14. View your web store.

15. Search for or browse to the category you created.
16. If necessary, refresh the page to see the changes you made. The following figure shows an example of adding several products to a subcategory of Electronics.

Demo category

8 Item(s) Show 9 per page

View as: [Grid](#) [List](#) Sort By [Position](#)

<p><u>22" Syncmaster LCD Monitor</u> \$399.99</p> <p>Add to Cart Add to Wishlist Add to Compare</p>	<p><u>Intel Core 2 Extreme QX9775 3.20GHz Retail</u> \$2,049.99</p> <p>Add to Cart Add to Wishlist Add to Compare</p>	<p><u>19" Widescreen Flat-Panel LCD Monitor</u> \$399.99</p> <p>Add to Cart Add to Wishlist Add to Compare</p>
<p><u>Sony VAIO 11.1" Notebook PC</u> As low as: \$2,699.99</p> <p>Add to Cart Add to Wishlist Add to Compare</p>	<p><u>Microsoft Natural Ergonomic Keyboard 4000</u> \$99.99</p> <p>Add to Cart Add to Wishlist Add to Compare</p>	<p><u>Microsoft Wireless Optical Mouse 5000</u> \$59.99</p> <p>Add to Cart Add to Wishlist Add to Compare</p>
<p><u>Gaming Computer</u> From: \$4,999.95 To: \$6,348.95</p> <p>Add to Cart Add to Wishlist Add to Compare</p>	<p><u>My Computer</u> From: \$635.97 To: \$3,786.68</p> <p>Add to Cart Add to Wishlist Add to Compare</p>	

Figure 273. Category Page

20 Getting Help

Magento CE offers a variety of options and possibilities, but also has a learning curve.

Magento provides several resources for getting help discovering Magento CE and using it daily to attain your eCommerce objectives.

You can start with the Search field at the top of the community site found at <http://www.magentocommerce.com>, which provides results from the Magento forum, knowledge base, wiki, groups, and other resources.

If you are unable to find answers to your questions, try posting your question in the Magento Answers site and the Magento forums, where thousands of participants help each other with Magento issues.

To access Magento Answers:

Go to <http://www.magentocommerce.com/answers/> and log in or using the user name and password that you created before downloading Magento CE. (If you do not have a Magento user name, you can register for one from this page.) Follow the onscreen directions to ask your question.

To access Magento forums:

Go to <http://www.magentocommerce.com/boards> and log in using the user name and password that you created before downloading Magento CE. Choose a forum that best matches your question.

If you found the answer yourself and were unable to find it elsewhere, please share it with others. Use the wiki or forums to write and share it.

There are also several other community features in addition to the forums described above that enable the exchange of ideas and help. They are:

- ❖ Groups: Link community members working on or interested in specific subjects, such as Designing For Magento and Drop Shippers.
- ❖ Chat: Provides a real time discussion with Magento community members.
- ❖ Wiki: Provides community editable pages for sharing ideas and findings, tutorials and information

The following lists other resources available to help you use get the most out of Magento:

Knowledge Base

The Magento knowledge base is a Wiki that provides instructions published by Magento or community members in the form of guides and “how-to” articles.

At: <http://www.magentocommerce.com/knowledge-base>

Getting Help

Webinar Archive

Up-to-date webinars are provided by Magento in which you can learn real-world tips and tricks in order to get the most out of your stores and promotions.

At: <http://www.magentocommerce.com/media/webinar-archive>

Screen casts

Screen casts are presentation videos that can guide you through many of the Magento features.

At: <http://www.magentocommerce.com/media/screencasts>

Magento Designer's Guide

The Magento Designer's Guide provides information for designers describing Magento concepts and design implementation in Magento.

At: http://www.magentocommerce.com/design_guide

Magento Blog

The Magento Blog contains fresh updates describing new Magento releases, interesting showcases and events.

At: <http://www.magentocommerce.com/blog>

Magento on Twitter

You can keep up with Magneto events and announcements by following Magento on Twitter.

At: <http://twitter.com/magento>

Technical Documents and Magento Core API

These provide developers with information on how to develop Magento CE.

At: <http://docs.magentocommerce.com/>

Here you can find information about all Magento classes and functions.

At: http://www.magentocommerce.com/support/magento_core_api

Here you can find information and usage examples for calling Magento CE using an API.

This enables easier integration of Magento CE with existing systems.

21 Appendix: VAT ID Validation

All editions of Magento include a value-added tax (VAT) ID validation feature. The feature is intended for B2B merchants from the European Union (EU), where VAT is charged if a merchant and a customer are in the same country, and VAT is not charged if a merchant and a customer are in different countries within EU and both parties are EU-registered business entities.

VAT identification number (VAT ID) Validation enables store administrators to create more than one default customer group, which will be automatically assigned to each customer during account creation, address creation or update, and checkout according to the customer's VAT ID, and the customer's and merchant's location countries. This feature enables merchants to create different tax rules for intra-country (domestic) and intra-EU sales, and to apply the corresponding VAT amount automatically.

Note: VAT-related tax rules do not influence other tax rules and do not prevent applying other tax rules where applicable. Only one tax rule can be applied at a given time.

Magento performs VAT ID validation using the web-services of the European Commission server: http://ec.europa.eu/taxation_customs/vies/.

VAT ID Validation Quick Reference

The following table lists the main tasks concerned with the VAT ID Validation feature and the locations, where they can be performed in the Admin Panel.

TASK	ADMIN MENU	SCOPE
Create customer groups, which can be used as default for the VAT ID Validation functionality	Customers > Customer Groups	
Enable the VAT ID Validation functionality	System > Configuration > CUSTOMERS > Customer Configuration > Create New Account Options	Store view
o Set the default groups for customers from your country and from other EU countries	System > Configuration > CUSTOMERS > Customer Configuration > Create New Account Options	Store view
o Set your country and VAT ID	System > Configuration > GENERAL > General > Store Information	Store view
o Modify Magento list of EU countries	System > Configuration > GENERAL > General > Countries Options	Global
o Edit the VAT Number customer address attribute	Customers > Attributes > Manage Customer Address Attributes	Global
o Create tax rates and tax rules for domestic, intra-EU and other VAT-related customer groups	Sales > Tax	

For assigning groups to customers, the default customer's address (billing or shipping) for tax calculation is used; the setting is configured under System › Configuration › CUSTOMERS › Customer Configuration › Create New Account Options › Tax Calculation Based On).

If the VAT ID Validation feature is enabled, you can still choose not to apply it for a certain customer by selecting the correspondent check box on the Customer Information page under Customers › Manage Customers.

Configuring VAT ID Validation

Configuring the VAT ID Validation includes these steps:

1. Creating VAT-related customer groups.
2. Creating tax classes, tax rates and tax rules.
3. Configuring the VAT ID Validation settings.
4. Setting your VAT ID and location country.
5. Modifying the list of EU member countries used by Magento. This step is only necessary if the EU gets new members or some countries leave the EU.

Creating the VAT-Related Customer Groups

VAT ID Validation functionality automatically assign one of the four default customer groups to customers according to VAT ID validation results:

- ❖ Domestic
- ❖ Intra-EU
- ❖ Invalid VAT ID

❖ Validation error.

You can create new customer groups to be used in the VAT ID Validation functionality or use existing groups, if they comply with your business logic.

Customer groups are created under Customers > Customer Groups.

When configuring the VAT ID Validation functionality, you will need to assign each of the created customer groups as a default for customers with appropriate VAT ID validation results. For details see the Enabling and Configuring the VAT ID Validation Functionality section further.

Configuring the VAT-Related Tax Rules

The VAT ID Validation functionality was implemented to facilitate the VAT applying for EU B2B merchants. In Magento, taxes are applied using the tax rules mechanism.

Each tax rule is defined by three entities:

Appendix: VAT ID Validation

❖ Customer Tax Classes

❖ Product Tax Classes ❖ Tax

Rates.

To use the VAT ID Validation functionality effectively, you need to create the appropriate tax rules.

Important Note: According to the EU taxation policy, the supply of services between businesses (B2B services) is in principle taxed at the customer's place of establishment (http://ec.europa.eu/taxation_customs/taxation/vat/how_vat_works/vat_on_services/index_en.htm). So if you sell downloadable or virtual products, which do not require shipping, the VAT rate of a customer's location country should be applied for both, intra-union and domestic sales.

It means that you additionally need to create individual tax rules for a product tax class corresponding to the downloadable and virtual product types.

The following table contains the minimal list of tax rules which must be created to use the VAT ID Validation functionality.

Tax rule #	Customer Tax Class	Product Tax Class	Tax Rate
1	A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed	A class for products of all types, except bundle and virtual	VAT rate of the merchant's country
2	A class for intra-union customers	A class for products of all types, except downloadable and virtual	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%
3 (required only if you sell products of bundle or virtual type)	A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed	A class for downloadable and virtual product types	VAT rate of the merchant's country

4 (required only if you sell products of bundle or virtual type)	A class for intra-union customers	A class for downloadable and virtual product types	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%
------------------------------------------------------------------	-----------------------------------	----------------------------------------------------	--------------------------------------------------------------------------------------

Note: It is recommended that you apply the merchant's VAT rate for customers with invalid VAT IDs and those for which validation fails. You can create other tax rules and apply other tax rates according to your business logic.

In the Magento Admin Panel, all tax rule related entities, including tax rules, tax rates, product tax classes and customer tax classes, are managed under Sales > Tax; tax classes are assigned to customer groups under Customers > Customer Groups > %customer group%.

Enabling and Configuring the VAT ID Validation Functionality

To enable VAT ID and set default groups:

1. Log in to the Magento Admin Panel.
2. Navigate to System > Configuration > CUSTOMERS > Customer Configuration.
3. In the Current Configuration Scope field in the upper-left corner leave Default Config or select the desired store view.
4. Expand the Create New Account Options field set.
5. In the Enable Automatic Assignment to Customer Group field, select Yes. The following fields appear:

- ❖ **Tax Calculation Based On:** Choose whether VAT calculation will be based on customer's shipping or billing address. If the customer does not have a shipping address (that is, the customer has only now registered and the system does not yet take into account the customer's shipping address), the Default Tax Destination Calculation address will be used for tax calculation to be displayed to the customer.

Important Note: If the Tax Calculation Based On is set to Shipping Address, then Magento will use billing address for VAT calculation, if a customer only buys downloadable and/or virtual products.

- ❖ **Group for Valid VAT ID – Domestic:** Choose a customer group, which is automatically assigned to customers coming from your country and whose VAT ID is valid. See “Configuring Additional Settings for the VAT ID Validation Feature,” page 283, for details about setting your location country.
- ❖ **Group for Valid VAT ID – Intra-Union –** Choose a customer group, which is automatically assigned to customers coming from EU countries other than yours, and whose VAT IDs are valid. See “Configuring Additional Settings for the VAT ID Validation Feature,” page 283, for details about where your location country is set.
- ❖ **Group for Invalid VAT ID:** Choose a customer group, which is automatically assigned to customers whose VAT ID is invalid.

Appendix: VAT ID Validation

- ❖ **Validation Error Group:** Choose a customer group, which is automatically assigned to customers for whom the VAT ID validation failed.
- ❖ **Validate on Each Transaction:** Choose whether VAT ID validation will be performed each time during order creation even if a previously saved customer address with validated VAT ID is used. The option applies to one-page checkout in the frontend only. If a new customer address is used (including guest checkout or if a customer has no address assigned to their account), then the validation is performed irrespective of this setting. During order creation in the Admin Panel, no automatic validations are performed.

❖ **Default Value for Disable Automatic Group Changes Based on VAT ID** (available only if Default Config is selected in Current Configuration Scope): Choose whether the automatic change of customer group based on VAT ID will be enabled or disabled by default. The setting can be overridden on the product level. The setting influences the system behavior in the following situations:

- i. The VAT ID of the customer's default address or the whole default address changes.
- ii. Customer group change was emulated during the checkout for a registered customer who had no previously saved address or for a customer, who registered during the checkout. If the automatic group change is enabled, then in the first case the customer group changes automatically, and in the second case the temporarily emulated customer group is assigned to customer. If the automatic group change is disabled, the customer group that is assigned assigned never changes, unless an administrator changes it manually.

❖ **Show VAT Number on Frontend**: Choose whether the field for entering and storing the VAT ID number will be visible in the frontend.

6 To save the settings, click Save Config.

If the VAT ID Validation feature is disabled (the Enable Automatic Assignment to Customer Group field set to No), then the system behavior is as usual, and the default customer group can be set in the Default Group field.

When the feature is enabled, the system does not automatically validate customer VAT IDs nor does it change customer groups.

Configuring Additional Settings for the VAT ID Validation Feature

To set your VAT ID and location country:

1. Navigate to System › Configuration › GENERAL › General.
2. In the Current Configuration Scope field, select the desired store view.
3. Expand the Store Information field set.
4. In the Country field, select your country.
5. In the VAT Number field, enter your VAT number. You can validate the entered value by clicking the Validate VAT Number button. The result of validation will be displayed immediately.

Note: If your VAT number is valid, then apart from validation result for each customer's VAT ID validation, the validation server will send to Magento the following additional information: VAT request identifier and VAT request date. If a customer's VAT validation is performed during checkout, then the VAT request identifier and VAT request date are saved in the Comments History section of the Order View page under Sales › Orders › (select appropriate order).

6. To save the settings, click Save Config.

To modify the list of the countries that are EU members:

1. Navigate to System › Configuration › GENERAL › General.
2. In the Current Configuration Scope field, select the desired store view.
3. Expand the Countries Options field set.

4. In the European Union Countries field make the necessary changes in the list of countries that are EU members.
5. To save the changes, click Save Config.

VAT ID Validation Implementation Details: Customer Experience

Assigning Customer Groups Based on VAT ID Value during Registration

If the VAT ID Validation feature is enabled, after registration each customer is proposed to enter the VAT ID number. However only those who are registered VAT customers are expected to fill this field.

After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address or changes the whole default address. And the group can be temporarily changed (group change will be emulated) in some cases during one-page checkout.

Applying and Assigning Customer Groups During Checkout

The system behavior concerned with the VAT ID validation and the customer group change during the checkout depends on how the Validate on Each Transaction and the Disable Automatic Group Change settings are configured. This section describes the implementation of the VAT ID Validation functionality for the checkout on the frontend.

In case a customer uses Google Express Checkout, PayPal Express Checkout or another external checkout method, when the checkout is performed completely on the side of the external payment gateway, the Validate on Each Transaction setting cannot be applied. Thus the customer group cannot change during checkout.

The following diagram illustrates the flow of VAT ID validation and customer group change during one-page checkout.

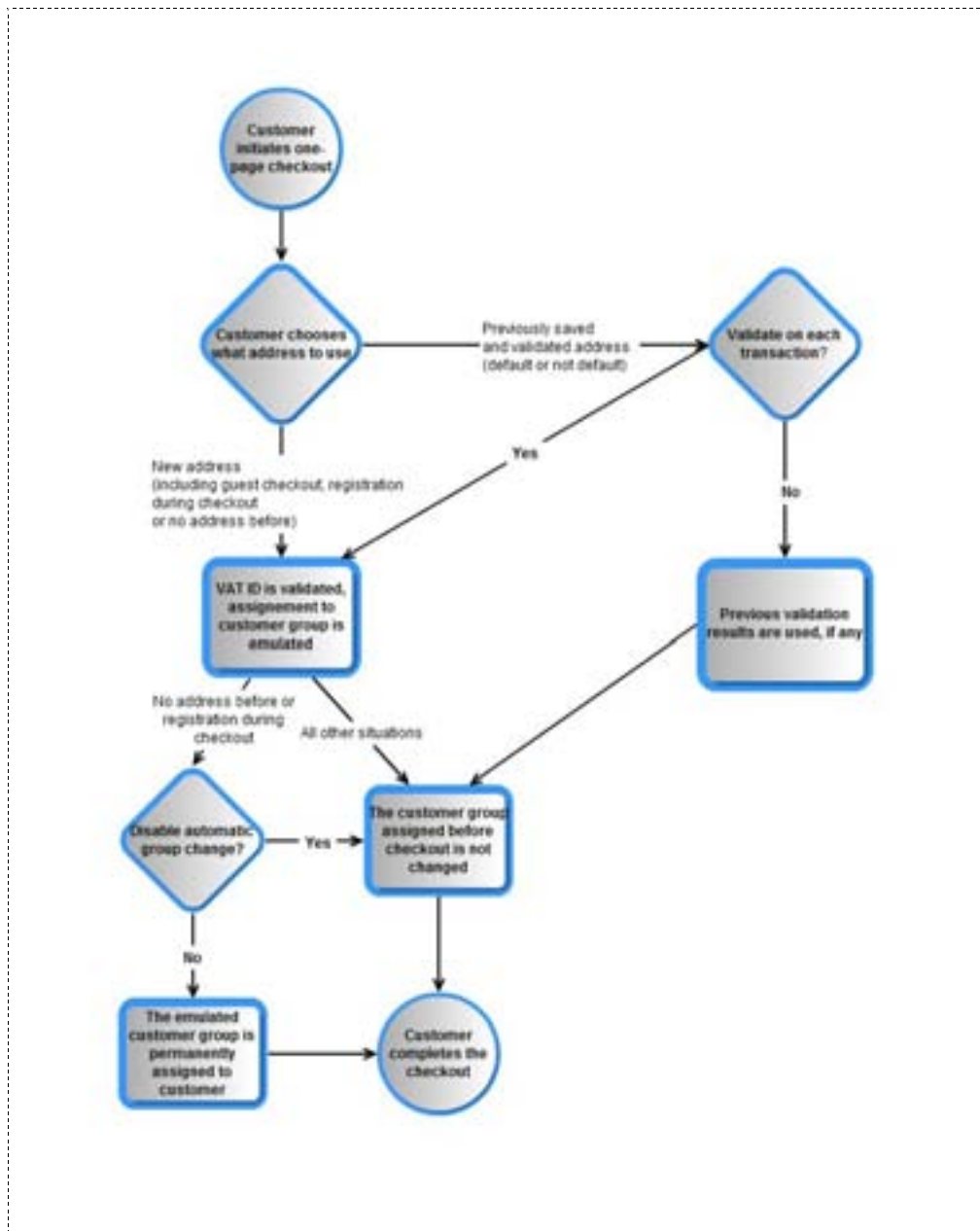


Figure 274. One-page checkout with VAT ID validation

VAT ID Validation Implementation Details:

Admin Experience

The VAT Number Customer Address Attribute

Customer VAT ID value is stored in the `vat_id` customer address attribute. The default label of this attribute is VAT number. Customer address attributes are managed under Customers > Attributes > Manage Customer Address Attributes.

The VAT number field is always present in all shipping and billing customer addresses in the backend. It is not mandatory. Displaying the field in the frontend is configured in the Show VAT Number in Frontend field under System > Configuration > CUSTOMERS > Customer Configuration > Create New Account Options.

Note: For customers not from the EU countries, consider storing the VAT number (if any), in the existing Tax/VAT Number customer attribute to avoid any possibility of customer group change (whether persistent or emulation during checkout). It is recommended that you rename the Tax/VAT Number customer attribute to avoid confusion with the new VAT Number customer address attribute that is used for the VAT ID Validation functionality.

Disabling Automatic Customer Group Change

When the VAT ID Validation functionality is enabled, the group of a customer can only be changed manually in the Admin Panel, no automatic changes of customer group can take place.

When the VAT ID Validation functionality is enabled, the system will automatically, permanently change a customer group in the following situations:

- ❖ The VAT ID of the customer's default address or the whole default address changes.
- ❖ The customer group change was emulated during the checkout for a registered customer who had no previously saved address, or a customer who registered during the checkout.

Appendix: VAT ID Validation

The automatic customer group change can be disabled by selecting the Disable automatic group change check box on the customer's page under Customers > Manage Customers > %customer% > Account Information. See Figure 275.

The screenshot shows a web interface for managing a customer's account. On the left is a sidebar with a 'Customer Information' section containing links like 'Customer View', 'Account Information', 'Addresses', 'Orders', 'Billing Agreements', 'Recurring Profiles (beta)', 'RMA', 'Shopping Cart', 'Wishlist', 'Newsletter', 'Product Reviews', 'Product Tags', 'Store Credit', 'Gift Registry', and 'Reward Points'. The main area is titled 'Kristina Augiers' and has buttons for 'Back', 'Reset', and 'Create Order'. Below this is the 'Account Information' form. The 'Group' dropdown menu is open, showing 'Retailer' as the selected option. A red circle highlights the 'Disable automatic group change' checkbox, which is checked. Other form fields include 'Associate to Website' (set to 'Sasha's website'), 'Created From' (set to 'Sasha's store view'), 'First Name' (Kristina), 'Middle Name/Initial' (empty), 'Last Name' (Augiers), 'Suffix' (empty), 'Email' (Kristina@ex.ua), 'Date Of Birth' (empty), 'Tax/VAT Number' (empty), 'Gender' (empty), and 'Photo' (empty with a 'Browse...' button).

Figure 275. Disabling automatic group change on customer level

Important Note: The setting does not influence the emulation of the customer group change during checkout.

The default value of the Disable automatic group change check box is set in the Default Value for Disable Automatic Group Changes Based on VAT ID field under System > Configuration > CUSTOMERS > Customer Configuration > Create New Account Options. The configuration setting is made on the global level. The default value applies to new customers and to customers whose records are available in the system when the VAT ID Validation functionality is enabled for the first time.

VAT ID Validation in Customer Accounts in the Admin Panel

When an administrator adds a new default address with a VAT ID to the account of a new or existing customer or changes the VAT ID of the existing default address, the system validates the VAT ID and assigns the appropriate customer group to the customer. The validation is performed after the Save or Save and Continue button is clicked.

Note: The system behavior is as described when the VAT ID Validation functionality is enabled and configured.

If you want to disable the automatic change of a customer group, select the Disable automatic group change check box on the Account Information tab of the Customer Information page.

VAT ID Validation During Order Creation in the Admin Panel

This section describes the system behavior when an admin creates a new order in the Admin Panel, with the VAT ID Validation functionality enabled and configured.

During order creation in the Admin Panel no VAT ID validation is performed automatically. To validate the VAT ID of the customer address, an administrator needs to click the Validate VAT Number button in the Billing Address or Shipping Address section of the Create New Order page. See Figure 276.

The image shows two side-by-side screenshots of the 'Billing Address' form in the Admin Panel. Both forms have a dropdown menu at the top with the text 'Has Marks, Street, London, 12345, United Kingdom'. Below the dropdown, there are input fields for 'First Name', 'Middle Name', 'Last Name', 'Suffix', 'Company', 'Street Address', 'City', 'Country', 'State/Province', 'Zip/Postal Code', 'Telephone', 'Fax', and 'VAT number'. The 'VAT number' field contains the text '123456789'. At the bottom of each form, there is a 'Save as Billing Address' checkbox and a 'Browse...' button. In the left screenshot, the 'Validate VAT ID' button is highlighted with a red circle. In the right screenshot, the 'Validate VAT ID' button is also highlighted with a red circle, and the 'Save as Billing Address' checkbox is checked.

Figure 276. Validating customer VAT ID during order creation in the Admin Panel

After the validation, the administrator receives a notification about the validation results in the form of a pop-up message.

A customer group, which should be assigned to a customer according to the validation results, can differ from the customer group that is currently assigned to the customer. In this case the system displays a dialog box suggesting that the administrator confirm or reject the group change emulation for the customer's current order. If the administrator confirms, then the group change is emulated for the current order and the corresponding VAT rate is applied (if the corresponding tax rule is configured in the system). The actual customer group of a customer is not changed.

If a new customer account is added during the order creation, and an administrator confirms using the customer group that corresponds to the VAT ID validation results,

then after the order creation the customer account is saved in the system and the customer group that was used for order creation is assigned to it.

22 Index

A

- About Us, 174
- Access Permissions, 13
- Account
 - My Account, 51
- Additional Shipping Modules, 151
- administrator users, 249
- Approving
 - Ratings and Reviews, 67
 - Reviews, 237
 - Tags, 239
- Attribute Sets
 - Defining, 92
- Attributes, 88
 - Defining, 89
 - Groups, 94
 - Sets, 92 auto-generation coupon
- codes, 204

B

- Backend
 - Accessing, 23

- Definition, 5

- backups, 250 rolling

- back, 250

- Banners, 46

- Bestsellers

- Dashboard, 62

- Products, 113

C

- CAPTCHA, 258

- Cart

- My Cart, 51, 52

- Cart Price Rule Actions

- Defining, 201

- Cart Price Rule Conditions Defining, 201

- Cart Price Rule Information

- Defining, 199

- Catalog

- Defaults, 70

- Price Rules, 194

- Rules, 194

- Shopping Cart Price Rules, 199

- Catalog Price Rule

- Defining, 196

- Catalog Price Rule Actions Defining, 198

- Categories, 107

- Creating, 79
- Definition, 38
- Displaying, 78
- Editing, 84
- Managing, 77
- Checkout, 51, 53
- Checks, 166
- CMS, 174
- CMS Pages, 174
- Comments History, 65
- Community Polls, 57
 - Managing, 240
- Comparing
 - Products, 42 compound
- taxes, 144 Configurable
- Product, 117
- Configuration
 - Basic, 23
 - Cross-sell, 108
 - Custom Group, 110
 - Custom Options, 110
 - Product Reviews, 109
 - Product Tags, 109
 - Product Type Dependent, 111
 - Related Products, 108
 - Super Product Attributes, 119
- Appendix: VAT ID Validation
 - Up-sell, 108
 - Websites, 107
- Contacting Information, 1
- Contacts, 30 Conventions, 1
- cookie restriction mode, 33
- cookies used in Magento, 35
- coupon codes auto-
 - generating, 204 tracking, 206
- Credit Cards, 163
- Credit Memo, 228 Email,
 - 233
- Credit Memos, 66
- Cross-sell Products, 48, 189, 193
- CSV file format, 124, 226
- Customer
 - Adding, 224
 - Editing, 223
 - Email Notifications, 65
 - Managing, 223
 - New, 224
 - New in Dashboard, 62
 - Online, 225
 - Report, 226
 - Tax Class, 133
 - Top in Dashboard, 62
 - Viewing, 223 Customer Emails,
 - 56 customer groups, 224 pricing,
 - 217 Customer Relations, 56
 - customer-generated content, 235

Customers Tagged, 110

Customization, 8 customizing email
templates, 177

D

Dashboard, 61 Database, 9, 13
database backup, 250 Default
Layered Navigation, 85 Demo Web
Store Accessing, 23
Descriptions, 102
Downloadable Products, 76, 111
Downloading
 Magento, 10 Sample
 Data, 11, 97

E

eco tax, 137
Emails, 56
 Addresses, 29
 Credit Memo, 233
 Customizing, 177
 Refund, 233
 Sales, 31
 Shipment, 231
 Templates, 178 exporting
product data, 124 Extending
Magento, 256
Extension Key Magento, 257

366

F

Facebook Open Graph, 179 File
names, 12 file system backup,
250
Filtering
 Products, 39
Filters
 Navigation, 84
Finding
 Products, 38 fixed product
tax (FPT), 137 flat rate
shipping, 147 Footer, 29, 50,
51
Free Shipping, 150
Frontend, 70
 Definition, 4

G

General Information Categories, 79
Google Analytics, 247 Grid
View, 44 group price, 217
Grouped Product, 116

H

Header, 28, 50, 51
Healthy Store, 249
Help, 277

Hold, 64 HTML Head, 26

I

Images, 100 importing product data,

124 Inbox, 60 Index Management

page, 263 indexing, 263 Information

Page, 64

Installing, 10, 13

Inventory, 106 Invoice, 66, 228

K

Key Magento, 257

L

Language

Emails, 178 layered

navigation by price, 86

Layered Navigation, 84

License, 3

Appendix: VAT ID Validation

M

Magento

Extension Key, 257

Introduction, 3

Managing customer records, 223

Messages, 60

Misspellings, 246

Money Orders, 166

Monitoring, 243

Most Viewed

Products In

Dashboard, 62

My Account, 51

My Cart, 51,

52 My Wish

List, 51

N

Newsletter, 219

Queues, 222

Reports, 222

Templates,

220 Notify

Customer, 65

O

Operating Systems, 9

Orders

Cancel, 64

Creating, 66, 228

Dashboard, 61

Details, 64

Filtering, 63

Hold, 64

Invoices, 65

Managing, 62, 223, 227

New, 66, 228

Sales, 228

Sorting, 64

Terminology, 228

 List View, 44

 Log in, 23, 51

Editing, 242

Managing, 240

Popular Search Terms, 75

Popular Tags, 41, 238 price

layered navigation, 86

Prices, 99

 Rules, 194

Pricing

 Tier, 208 product

data exporting, 124

Viewing, 63, 64

Appendix: VAT ID Validation

P

payment

 checks, 166 money

orders, 166 Payment,

153 payment methods

 PayPal Advanced, 155

 PayPal Express Checkout, 158

PayPal, 153

PayPal Advanced payment method,

 155

PayPal Express Checkout payment

 method, 158

Permissions, 13

Polls, 57

import, 124

Product Image Placeholders, 73

Product List Banners, 46

Product Reviews, 109

Product Tags, 109

Product Types, 96

Product Wizard, 120

Products

 Alerts, 72

 Attributes, 88

 Catalog Tab, 83

 Categories, 107

 Changing, 121

 Compared, 73

 Comparing, 42

 Creating, 96

 Cross-sell, 48

 Cross-sells, 189, 193

Editing, 120

Images, 100
Inventory, 106
Managing, 95
Meta Info, 100
New, 96
Pages, 49
Prices, 99
Ratings, 67
Recently Viewed, 73
Related, 48, 189, 192
Reviews, 67, 72
Searching, 42
SKU, 98
Sorting, 44
Tax Class, 98, 132
Tax Classes, 132
Taxes, 129
Up-sell, 47
Up-sells, 189, 190
Variations, 121
Weight, 98
Wizard, 97
Promotional Information, 45
Promotional Pages, 46
Promotions, 189, 203 Purchasing
Functionality, 52

R

Rates, 134

Ratings, 56, 67
 Customizing, 236
 Managing, 235
Recently Viewed, 45 Redirects,
246 refreshing statistics, 244
Refund
 Email, 233 Refunding, 232
reindexing, 263 Related
Products, 48, 189, 192
Reports, 243
 Customer, 226
 Generating, 67, 243
Requirements, 9
Reviews, 56, 67
 Approving, 237
 Managing, 235 rewrites
 URL, 265 rolling back a
backup, 250
Rules
 Catalog Price, 194
 Price, 194 Shopping Cart
 Price, 199

S

Sales Order, 228 sales reports
refreshing statistics, 244
Search Engine, 74
Search Redirects, 246

- Search Synonyms, 246
- Search Terms, 75
- Searching, 42
- Shipment, 66, 228
 - Email, 231
 - Rates, 147
 - Settings, 32
 - Tracking Number, 231 shipping
- additional modules, 151 flat rate, 147 free, 150 online rates, 149
- Shipping Rates, 147
- Shipping Settings, 147 SHOP
- BY Panel, 79 shopping cart
- clearing, 53, 231 Shopping
- Cart
 - Rules, 199

Appendix: VAT ID Validation

- Simple Associated Product, 119
- Site Map, 74
- Skins, 8 SKU, 98 social
- networking buttons, 179
- Sorting
 - Products, 44
- Special Prices, 206
- Staging

- Environment, 253
- store
 - creating, 127
- store hierarchy, 127 store view
 - creating, 127
- Supervising Web Store Activities, 61
- Support, 1
- Synonyms, 246
- system backup, 250 System
- Requirements, 9

T

- Tags
 - Adding, 239
 - Approving, 239
 - Definition, 41
 - Managing, 238
- Tax Class, 98, 132
 - Customer, 133
- Tax Zones, 134
- Taxation
- Settings, 129
- taxes

compound, 144

W

eco tax, 137 fixed

product tax, 137

management

rules, 135

Value Added Tax (VAT), 142

WEEE tax, 137

Taxes, 129

Testing Environment, 253

Theme, 170

Tier Pricing, 208

Appendix: VAT ID Validation

tracking coupon code usage, 206

Tracking Number, 231

U

Updating Magento CE, 254

Uploading

To the Server, 12

Up-sell Products, 47, 189, 190

URL

Product, 99

URL rewrites, 265

V

Value Added Tax (VAT), 142

Value-Added Tax (VAT), 279

ID validation, 279

website creating, 127

WEEE tax, 137

Weight, 98

Wish List, 51