

Magento Open Source

# User Guide

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## About This Guide

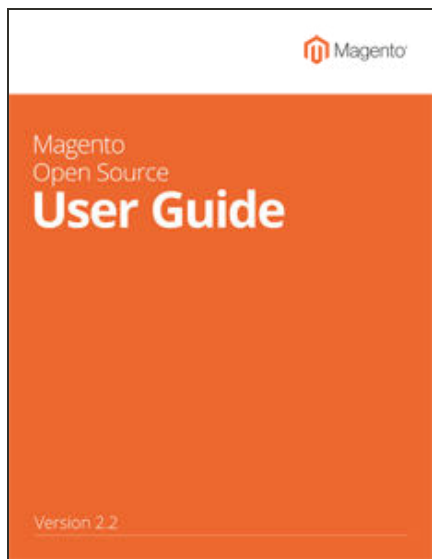
This guide answers the “why, where, and how” questions that most merchants have when learning to use Magento. You’ll find lots of step-by-step instructions, screenshots and examples, plus a comprehensive online [configuration reference](#) that is linked throughout the material. After learning the basics, you can use this guide as a springboard to more advanced topics and resources.



### Online User Guide

---

The online (HTML) guide is the primary user documentation for the current release of Magento Open Source. The content is continually updated to provide you with the best possible assistance. To learn about recent additions or changes to existing topics, see the [Change Log](#) at the end of the guide.



### PDF User Guide (You are here!)

---

You’ll find the same great information in the PDF user guide, based on the date last updated. Simply click the link to open the PDF in your browser. You can also right-click the download link to save the file to your computer. To page through the PDF as a book, set your reader’s View > Page Display to “Two Page View”. See the [Documentation Archive](#) for previous versions of the user guide. Updated: 5 February, 2019



# GETTING STARTED

## Contents

This section of the guide provides an overview of the resources that are available to you as a member of the Magento community. You'll learn about the current release, and how to log into your Magento account. Finally, you'll take a guided tour of Magento from two different perspectives, with links you can explore to learn more about each topic.

### Welcome

- [About This Guide](#)

- [Resources](#)

- [Join the Conversation!](#)

### About This Release

- [System Requirements](#)

- [Installation](#)

- [Prelaunch Checklist](#)

- [Your Login Credentials](#)

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### Your Magento Account

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- [Path to Purchase](#)

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- [Search Results](#)

- [Product Page](#)

- [Shopping Cart](#)

### Customer Journey

- [Attract New Customers](#)

- [Engage Your Customers](#)

- [Moment of Purchase](#)

- [Increase Average Order Value](#)

- [Customer Retention](#)

- [Loyalty & Advocacy](#)

- [Success!](#)

### Basic Configuration

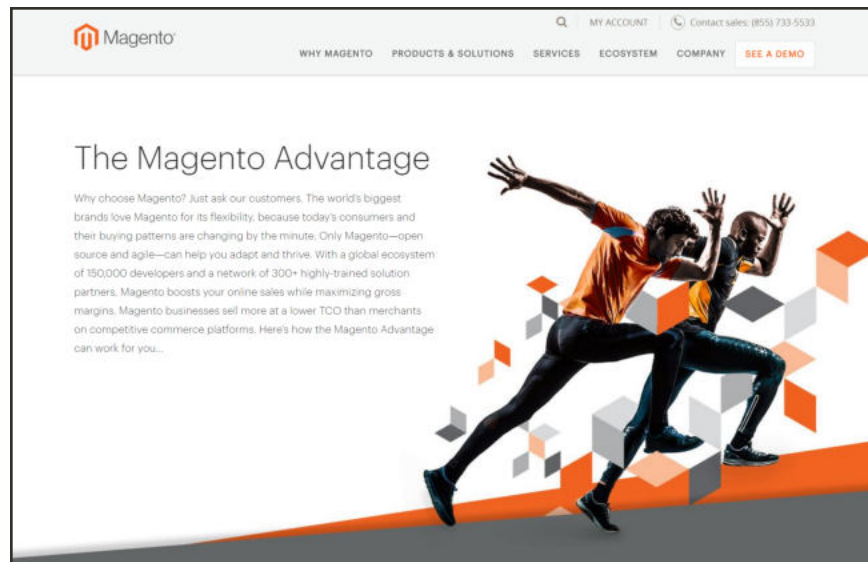




## CHAPTER 1:

# Welcome

Welcome to the next generation of the world’s leading digital commerce platform! Built on open-source technology, Magento Open Source provides online merchants with flexibility and control over the look, content, and functionality of their online stores. Magento’s intuitive Admin features marketing, search engine optimization, and product management tools that give you the power to create sites that are tailored to your unique business needs. Robust and scalable, Magento Open Source offers you a stable and customizable solution for your growing small business or as a tool to prototype new ideas and business models for larger merchants.



*Magento Advantage*

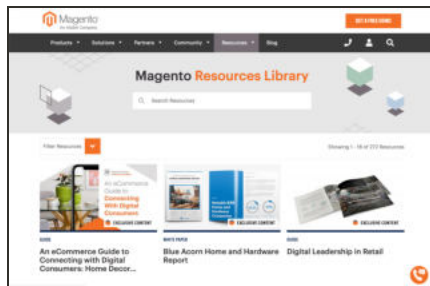
# Resources

Magento provides a wealth of business and technical resources, self-help tools, and services to help you succeed.



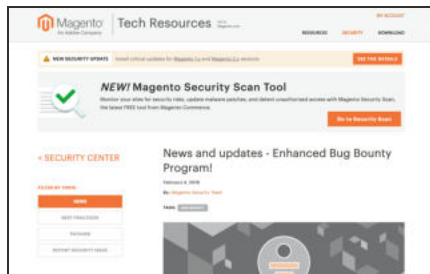
## Product Documentation

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



## Magento Resources Library

Gain access to expert insight and online business resources to help develop and improve your store. Ebooks, Magento whitepapers, and webinars.



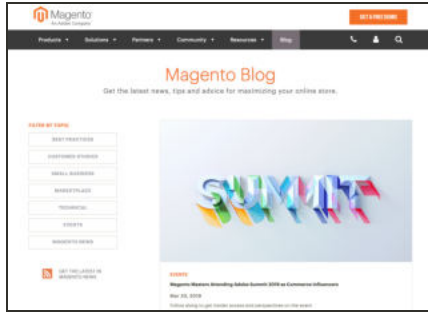
## Security Center

Join Magento's Security Alert Registry to get the latest information on potential vulnerabilities and **Security Best Practices**.



## Forums

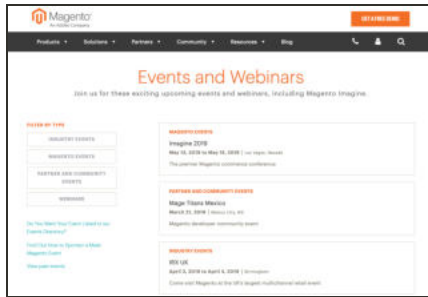
The Magento forums provide access to a network of dedicated Magento enthusiasts who share tips, tricks and support.



## Blog

---

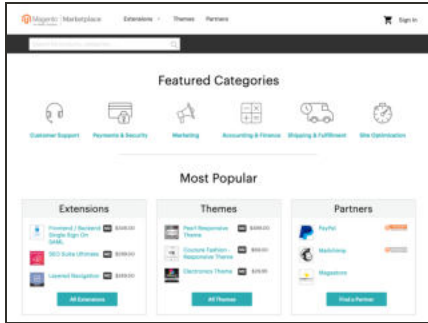
Check out the Magento blog for the latest information about new features, trends, best practices, upcoming events, and more!



## Events and Webinars

---

Keep tabs on our calendar of upcoming events and webinars. There's always something happening in the Magento ecosystem!



## Magento Marketplace

---

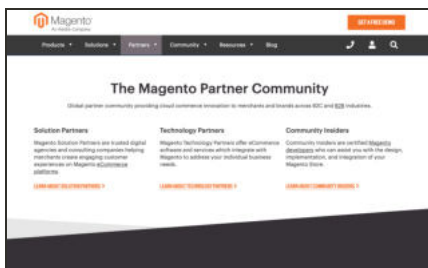
Visit Magento’s next-generation marketplace of digital commerce solutions. Magento Marketplace offers merchants a curated selection of solutions, while providing qualified developers the tools, platform, and prime location for a thriving business.



## Training & Certification

---

Learn how to unleash the power and flexibility of Magento. We provide training for every role in your business, including marketers, designers, developers, and more. Experienced Magento professionals can validate their real-world skills by earning Magento certification.



## Partners

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Magento partners are committed to your success, and provide custom integrations, best-in-class customer experiences, strategic marketing initiatives, and expert performance and scalability optimization for both on-premise and cloud-based solutions.



## Expert Consulting Services

---

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

# Join the Conversation!

Keep up with the latest news from the ecosystem, and connect with other merchants and developers on social media networks.



## Magento Forums

---

This is the place to find solutions, become acquainted with international communities, and join a special interest chat! Share your knowledge and earn kudos from others!



## Facebook

---

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



## Twitter

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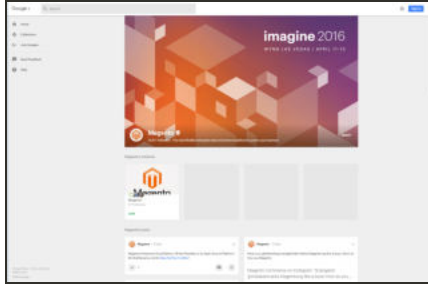
Follow us on Twitter!



## LinkedIn

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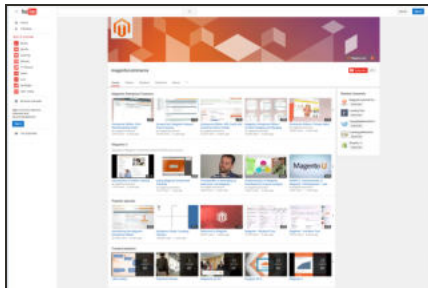
Join a Magento group on LinkedIn.



## Google+

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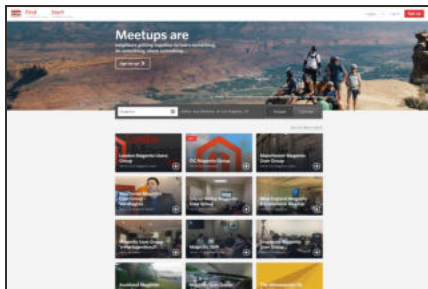
Add us to your circle on Google+.



## YouTube

---

Learn while you watch videos on our YouTube channel!



## Meetup

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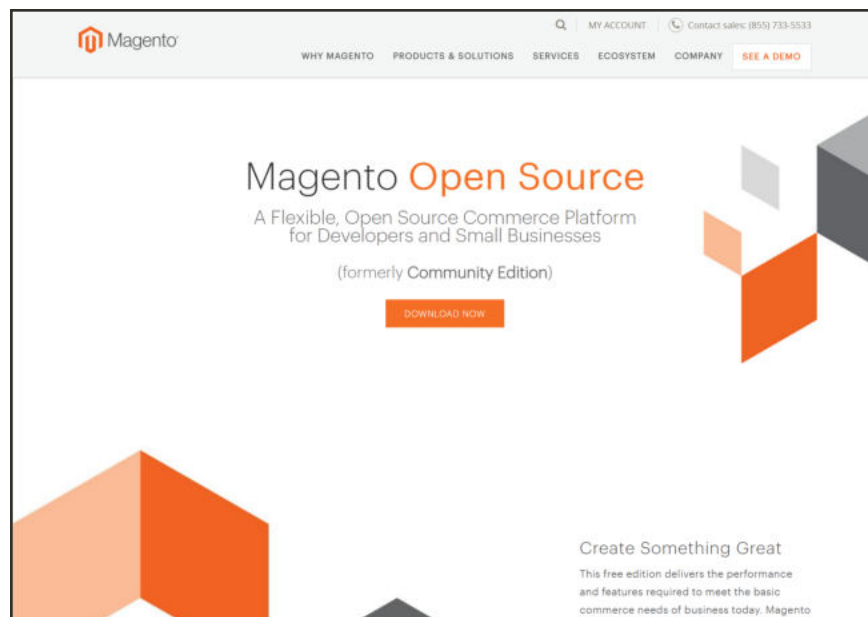
Find a Magento Meetup near you!



## CHAPTER 2:

# About This Release

As a best practice, we recommend that you keep your Magento installation up to date, so you can benefit from the latest advancements. Release notes provide a detailed description of the changes in each product release, with links to additional technical information, installation instructions, and support resources. To learn more about current and past releases, see [Release Information](#).



*Magento Open Source*

## Installation

To download and install the latest release of Magento 2.3.x on your server, see the [Installation](#) and [Configuration](#) in our technical documentation. The Magento installation can be deployed to run in either production or developer mode. Some tools and configuration settings are designed specifically for developers, and can be accessed only while the store is running in developer mode. To learn more, see [Magento Modes](#).

The Magento installation guide provides multiple options including download zip file, Composer, and cloned code repository. We recommend reviewing the following information:

- [System requirements](#)
- [Prerequisites](#)
- [Installation roadmap](#)
- [Post Installation](#)

To update an existing installation, see [Web Setup Wizard](#) in the System section of this guide.



## Prelaunch Checklist

After you complete the design, development, and testing of your store, check the following configuration settings to make sure everything is correct before the store “goes live.” For a comprehensive description of every configuration setting, see the [Configuration Reference](#).

### General Settings

- Store URLs**  
Verify that the store URLs for the storefront and Admin are correct for a live production environment.
- Security Certificate**  
Before launching your store, install a 100% Signed and Trusted Security Certificate for the domain specified in the Base URL.
- Store Email Addresses**  
Complete all the email addresses that are used to send and receive email notifications, such as new orders, invoices, shipments, credit memos, product price alerts, newsletters, and so on. Make sure that each field contains a valid business email address.

### Marketing Settings

- Email Templates**  
Update the default email templates to reflect your brand. Make sure to update the configuration if you create new templates.
- Sales Communications**  
Make sure that your invoices and packing slips include the correct business information and reflect your brand.
- Google Tools**  
Magento is integrated with Google API to allow your business to use Google Analytics and Google AdWords.

## Sales & Marketing Settings



### Cart Options

Take a look at the cart configuration settings, to see if there's anything that you want to change. This is where you can set the minimum order amount and lifetime of the prices in the cart.



### Checkout Options

Take a look at the checkout options, to see if there's anything that you want to change. This is where you can set up terms and conditions, and configure guest checkout.



### Taxes

Make sure that taxes are properly configured according to your business tax rules and local requirements.



### Shipping Methods

Enable all carriers and shipping methods to be used by the company.



### PayPal

If you plan to offer your customers the convenience of paying with PayPal, open a PayPal Merchant Account, and set up a payment method. Run some test transactions in Sandbox Mode before the store goes live.



### Payment Methods

Enable the payment methods that you plan to use, and make sure that they are properly configured. Check the order status settings, accepted currency, allowed countries, and so on.

## System Settings



### Cron (Scheduled Tasks)

Cron jobs are used to process email, catalog price rules, newsletters, customer alerts, Google sitemaps, update currency rates, and so on. Make sure that Cron jobs are set to run at the appropriate time interval, in minutes.

## Your Login Credentials

Before you go any further, make sure that you have the information that you need to access the Admin of your store, and your Magento account.



### Storefront URL

The address for your storefront is usually the domain that is assigned to your IP address. Some stores are installed the root, or topmost directory. Others are installed in a directory below the root. Your store might be located in a subdomain that is associated with your primary domain. Your store URL might look like one of the following:

`http://mydomain.com`

`http://www.mydomain.com/mystore`

`http://www.mydomain.com/mystore`

`http://xxx.xxx.xxx.xxx`

If you don't yet have a domain, your store URL will include a series of four numbers, each separated by a period in "dotted quad" notation.



### Admin URL

The address for your store Admin was set up during the installation. The default address is the same as your store, but with `/admin` at the end. Although the examples in this guide use the default directory, we recommend that run your Admin from a location that is unique to your store.

`http://mydomain.com/admin`

`http://www.mydomain.com/admin`



### Magento Account

Your Magento account provides access to information about your products and services, account settings, billing history, and support resources. To access your account, visit the Magento site and click the My Account link in the header.



### Customer Account

While you're learning your way around the store, make sure to set up a test **customer account**, so you can experience the store and checkout process from the customer's perspective.

## For Your Records

As a best practice, keep a record of the details of your installation, your login credentials, and the email address that is associated with each account. You can print this page, write down your credentials, and keep it in a safe, convenient place.

### Store and Admin

Store URL: \_\_\_\_\_

Admin URL: \_\_\_\_\_

Admin User Name: \_\_\_\_\_

Admin Password: \_\_\_\_\_

Admin Email  
Address: \_\_\_\_\_

### Magento Account

User Name: \_\_\_\_\_

Password: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Test Customer Account

User Name: \_\_\_\_\_

Password: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Installation Information

Installation Date: \_\_\_\_\_

Magento Version: \_\_\_\_\_

Encryption Key: \_\_\_\_\_

Database Name: \_\_\_\_\_

Database User Name: \_\_\_\_\_

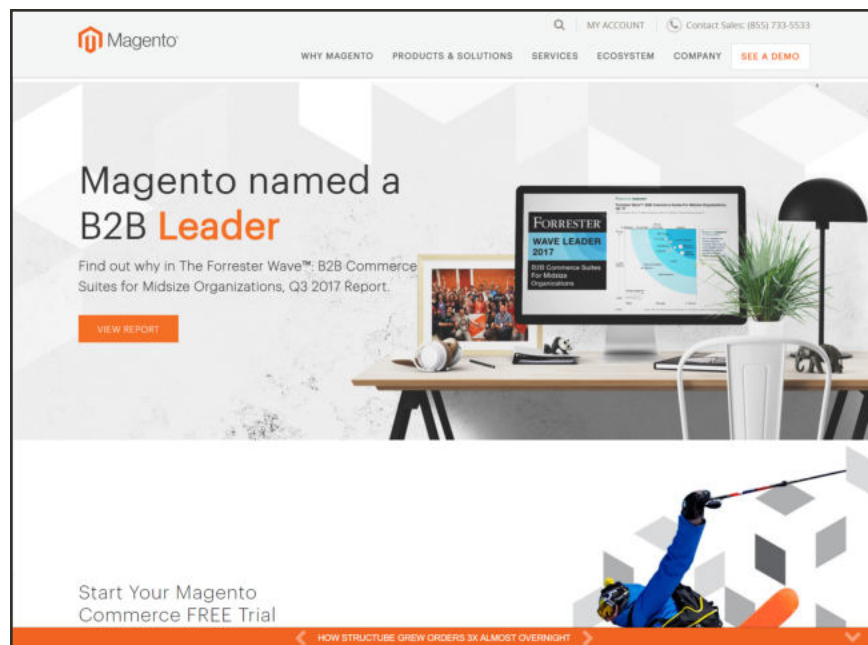
Database Password: \_\_\_\_\_



## CHAPTER 3:

# Your Magento Account

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



*Your Magento Account*

## Creating an Account

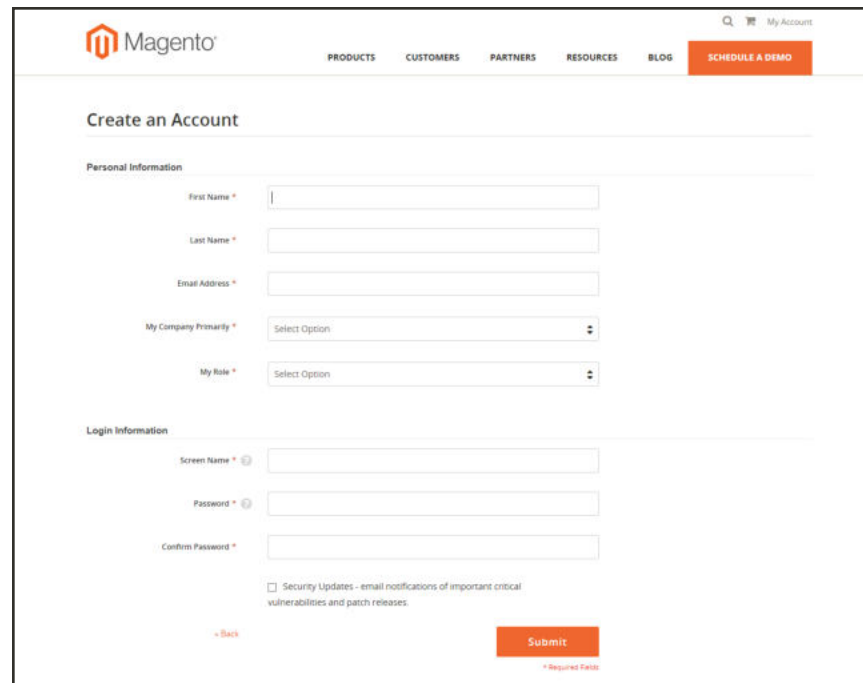
Anyone can open a free Magento account from our website. The email address that is used to open a Magento account can be associated with only one account, and the screen name that you enter becomes your identity in Magento forums.

### To create a Magento account:

1. Visit the Magento site at: <http://www.magento.com>
2. In the upper-right corner, choose **My Account**. Then under New Customers, tap **Register**.

### *Log In to Your Account*

3. Under Personal Information, do the following:
  - a. Enter your **First Name**, **Last Name**, and **Email Address**.
  - b. Set **My Company Primarily** to the best description of what your company does. Then, set **My Role** to the best description of what you do for the company.
4. Under Login Information, do the following:
  - a. Enter a **Screen Name** to identify you in the [Magento Community Forums](#).  
Your screen name can be from four to fifteen characters long, can include numbers and the underscore, but must start with a letter.
  - b. Enter a **Password** for your account. Then, enter it again to confirm.  
Your password can be from eight to sixteen characters long, and must include at least one capital letter, one number, and one special character or one lowercase letter.
  - c. When complete, tap **Submit**. Your account dashboard appears.

The image shows a screenshot of the Magento 'Create an Account' form. At the top, there is the Magento logo and a navigation menu with links for PRODUCTS, CUSTOMERS, PARTNERS, RESOURCES, BLOG, and a red button labeled 'SCHEDULE A DEMO'. The main heading is 'Create an Account'. Below this, there are two sections: 'Personal Information' and 'Login Information'. The 'Personal Information' section includes fields for First Name, Last Name, Email Address, My Company Primary (a dropdown menu), and My Role (a dropdown menu). The 'Login Information' section includes fields for Screen Name, Password, and Confirm Password. There is a checkbox for 'Security Updates - email notifications of important critical vulnerabilities and patch releases.' At the bottom left, there is a red '- Back' link, and at the bottom right, there is a red 'Submit' button. A small red asterisk indicates required fields.

*Create an Account*

### To log in to your Magento account:

1. Go to the Magento site: <http://www.magento.com>
2. In the upper-right corner, click **My Account**.
3. Enter the **Email** address that is associated with your account. Then, enter your **Password**.
4. When complete, tap **Login**.

### To receive a new password:

1. If you forget your password, click **Forgot Your Password?**
2. Enter the **Email Address** that is associated with your account, and tap **Submit**.

You will receive an email from Magento with a temporary password that you can use to log into your account. Then, reset your password from the dashboard of your account.

**To reset your password:**

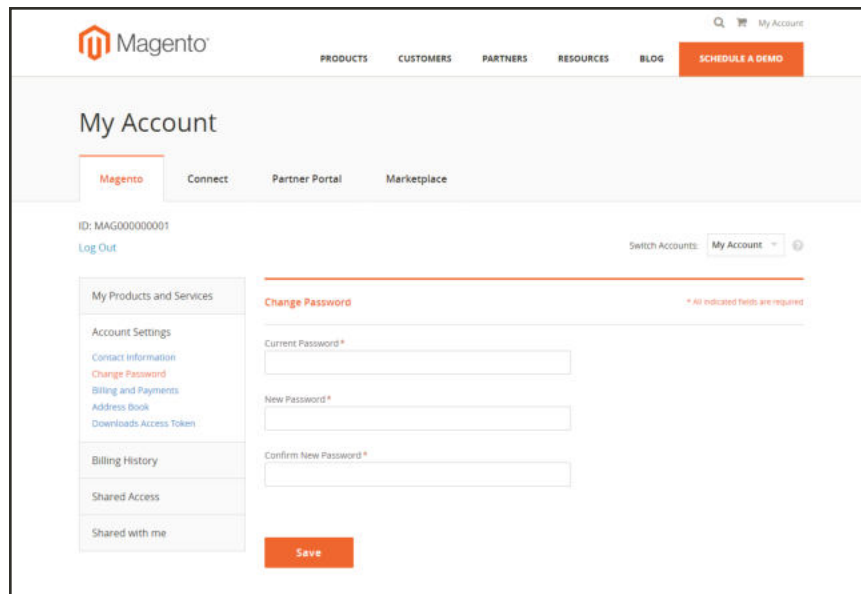
1. Log in to your Magento account.
2. In the panel on the left, choose **Account Settings**. Then, tap **Change Password**
3. Enter your **Current Password**.

If you forgot your password, enter the temporary password that was sent to you.

4. Enter your **New Password**. Then, enter it again to confirm.

Your Magento password must be between 8-16 characters, and include at least one capital letter, one number, and one special character or lowercase letter.

5. When complete, tap **Save**.



*Change Password*

**Magento Account Password Requirements**

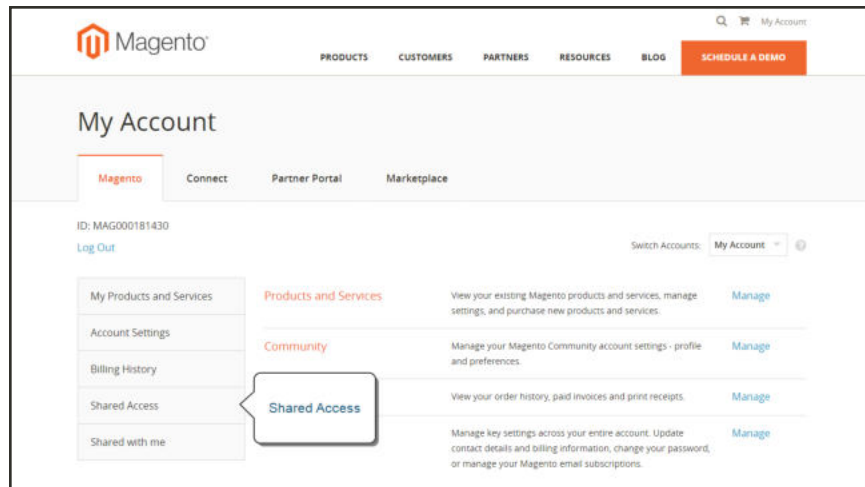
FIELD	DESCRIPTION
Password	Your Magento password must be between 8-16 characters, and include at least one capital letter, one number, and one special character or lowercase letter.



## Sharing Your Account

Your Magento account contains information that can be useful to trusted employees and service providers who help to manage your site. As the primary account holder, you have authority to grant limited access to your account to other Magento account holders. When your account is shared, all sensitive information—such as your billing history or credit card information—remains protected. It is not shared at any time with other users.

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



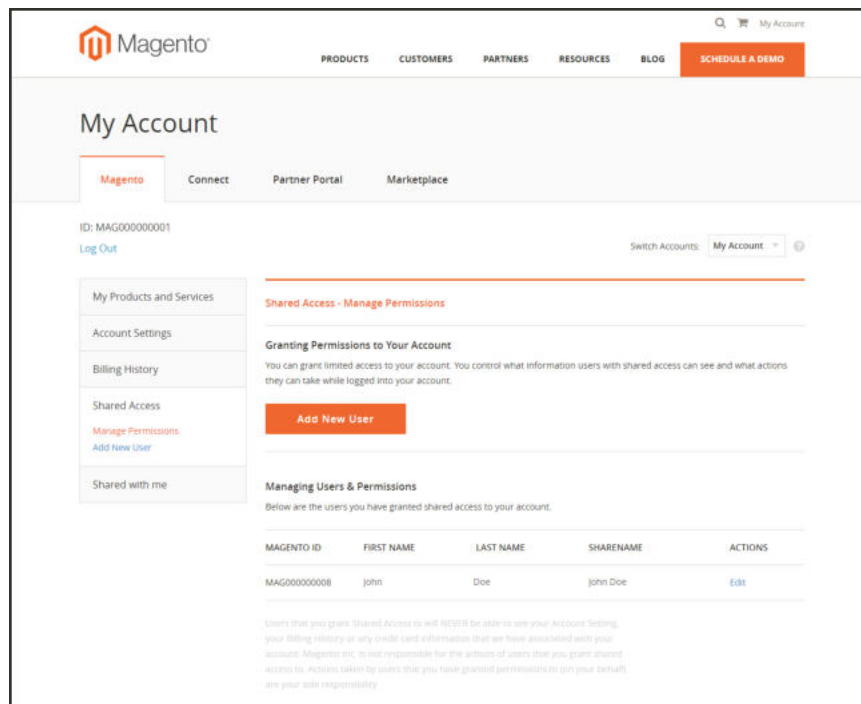
*Shared Access*

### To set up a shared account:

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

- a. Enter a **Sharename** to identify your shared account. Because the Sharename becomes an option in the Switch Accounts list, it should be something that the other person will recognize as your account.
- b. To share your personal contact information, mark the checkbox of each item that you want to make available to the other person:
  - Your Email
  - Your Phone
5. In the Grant Account Permissions section, mark the checkbox of each Magento product and service that you want to share.
6. When complete, tap **Create Shared Access**.

You are notified when the new role is saved, and the new user record appears in the Manage Permissions section of the Shared Access page. Magento also sends an email invitation with instructions for accessing the shared account to the new user.

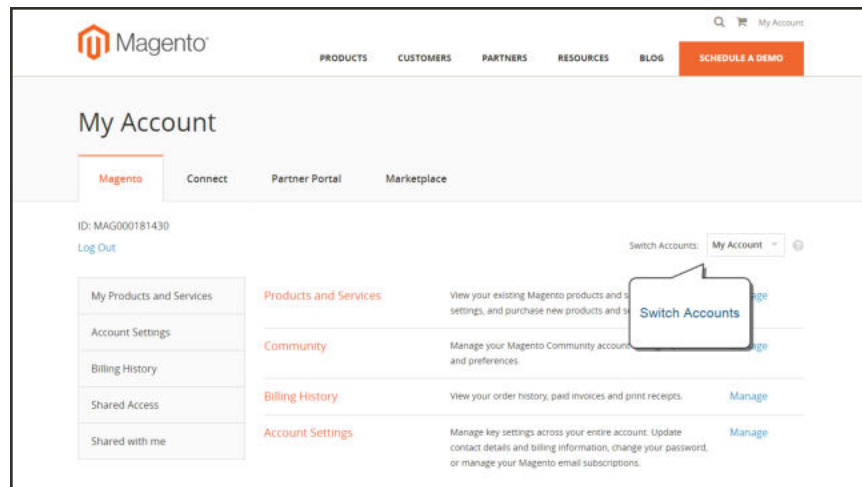


*Manage Permissions*

**To access a shared account:**

1. When you receive the invitation to a shared account, log in to your own Magento account.  
Your account dashboard has a new Switch Accounts control in the upper-right corner, with options for “My Account” and the name of the shared account.
2. To gain access to the shared account, set **Switch Accounts** to the name of the shared account.

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



*Switch Accounts*

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



## CHAPTER 4:

### Quick Tour

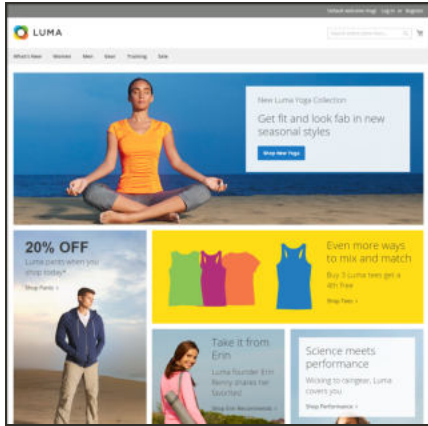
In this quick tour, we'll take a look at each page that customers usually visit while shopping in your store. The path that customers follow that leads to a sale is sometimes called the “path to purchase.” Then, we'll take a look at the major landmarks along the journey, and consider how Magento Open Source can be used to attract and engage customers, increase the average order, and build loyalty and advocacy.



*Customer Journey*

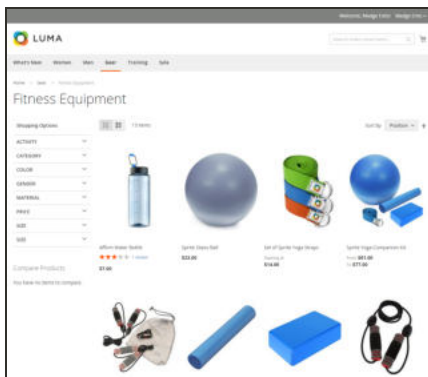
## Path to Purchase

The path customers follow that leads to a sale is sometimes called the “path to purchase.” In this quick tour, we’ll take a look at pages of strategic value that customers usually visit while shopping in your store. Then, we’ll consider different store features that can be leveraged at each stage of the customer journey.



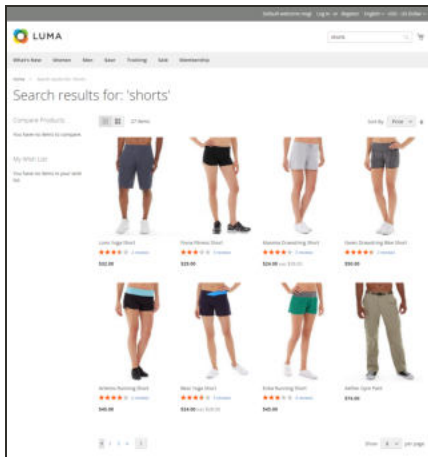
### Home Page

Your home page is like the front window display of your store. As the primary landing page, its design entices visitors to come inside for a closer look.



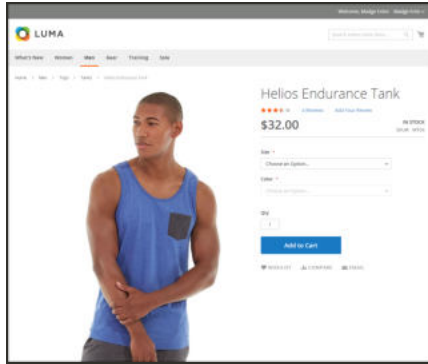
### Catalog Page

This page shows products from your catalog in either a list or grid format. The selection can be based on a category chosen from the main menu, a choice made in the layered navigation on the left, or the results of a search. Any item can be examined in more detail, or placed directly into the shopping cart.



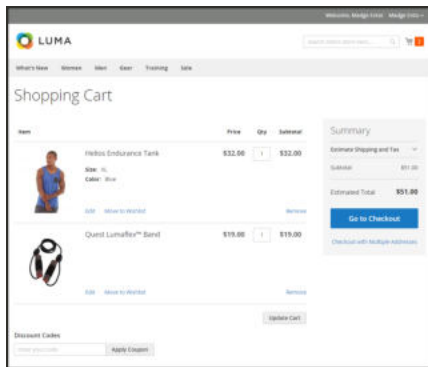
### Search Results

Did you know that people who use search are nearly twice as likely to make a purchase as those who rely on navigation alone? You might consider these shoppers to be “pre-qualified.”



## Product Page

The product page provides detailed information about a specific item in your catalog. Shoppers can read reviews, add the product to their wish lists, compare it to other products, share the link with friends, and most importantly, place the item into their shopping carts.



## Shopping Cart

The shopping cart lists each item by price and quantity selected, and calculates the subtotal. Shoppers can apply discount coupons, and generate an estimate of shipping and tax charges.

## Home Page

Did you know that most people spend only a few seconds on a page before they decide to stay or go somewhere else? That's not long to make an impression! Studies show that people also love photographs, especially of other people. Whatever design you choose, everything on your home page should move visitors along toward the next step in the sales process. The idea is to guide their attention in a cohesive flow from one point of interest to the next.

### Callouts

- Main Menu
- Search
- Your Account
- Feature a Brand
- Offer a Promotion
- Offer a Discount
- Hear from an Expert
- Appeal to a Lifestyle
- Shop by Fabric
- Popular Products
- Footer Links Block
- Footer Content
- Subscribe!





Home Page

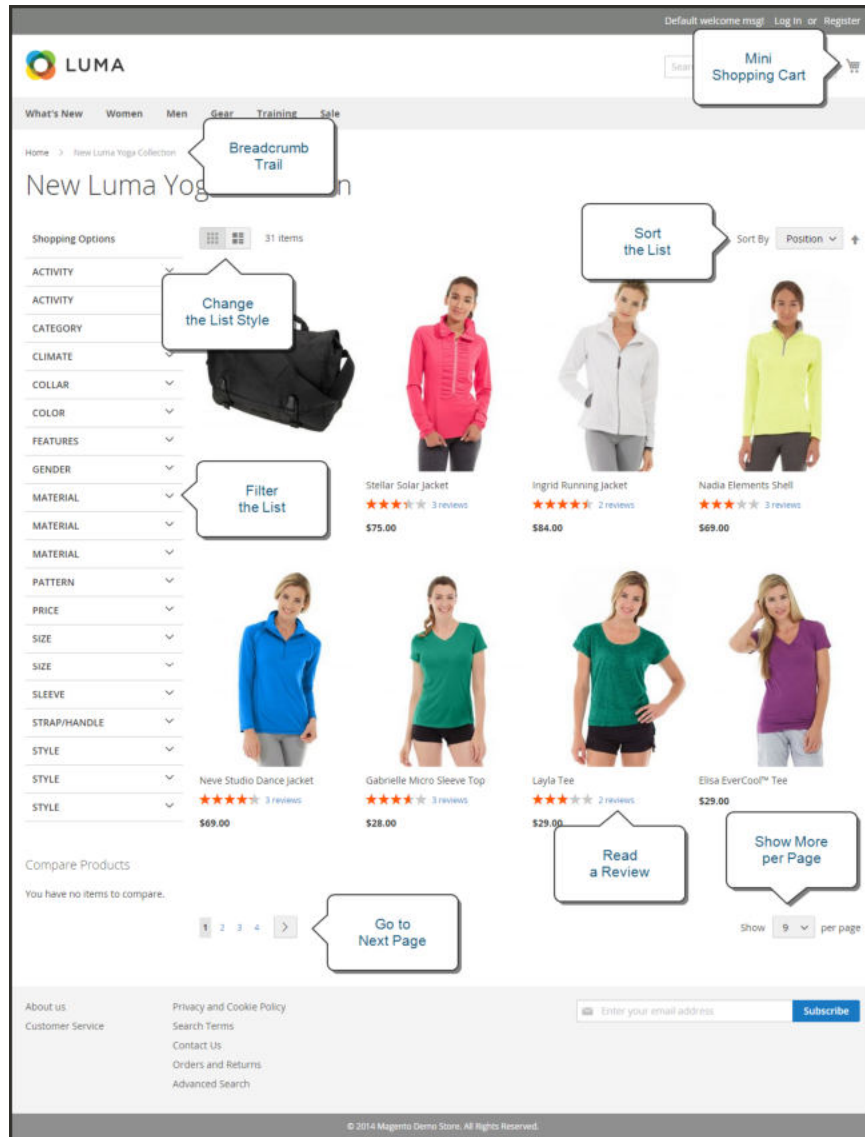
## Catalog Page

Catalog page listings typically have small product images and brief descriptions, and can be formatted as a list or as a grid. You can add banners, videos, and keyword-rich descriptions, and also create special designs for a promotion or season. You might create a special category to feature a lifestyle or brand that is a curated collection of products from different categories.

The initial product description usually gives shoppers just enough information to merit a closer look. People who know what they want can add the product to their carts and go. Customers who shop while logged in to their accounts enjoy a personalized shopping experience.

### Callouts

- Mini Shopping Cart
- Breadcrumb Trail
- Change the List Style
- Sort the List
- Filter the List
- Go to Next Page
- Read a Review
- Show More per Page



Catalog Page

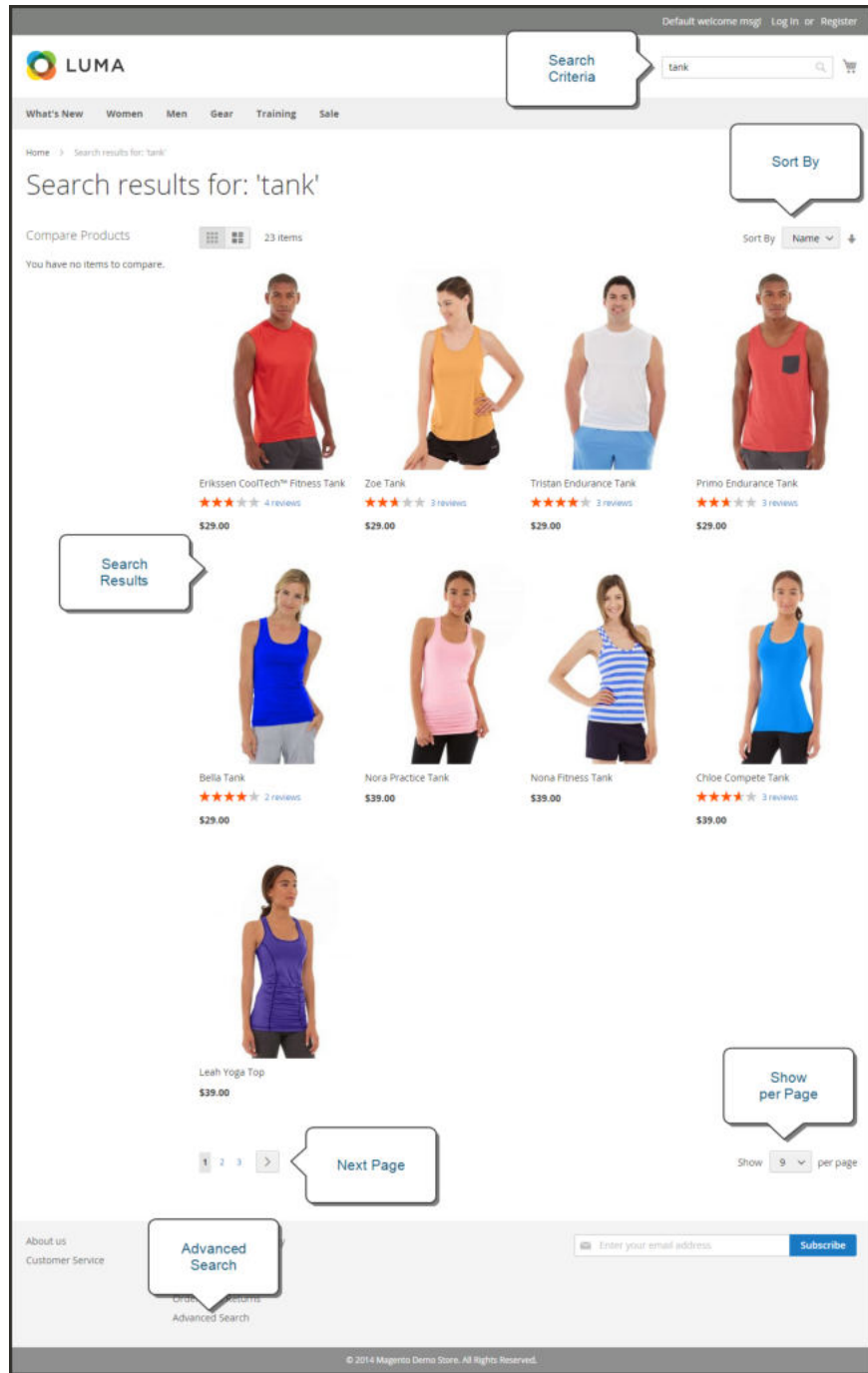
## Search Results

Did you know that people who use search are nearly twice as likely to make a purchase as those who rely on navigation alone? You might consider these shoppers to be “pre-qualified.”

Your store has a Search box in the upper-right corner, and a link to Advanced Search in the footer. All of the search terms that shoppers submit are saved, so you can see exactly what they’re looking for. You can offer suggestions, and enter synonyms and common misspellings. Then, display a specific page when a search term is entered.

### Callouts

- Search Criteria
- Sort By
- Search Results
- Show per Page
- Next Page
- Advanced Search



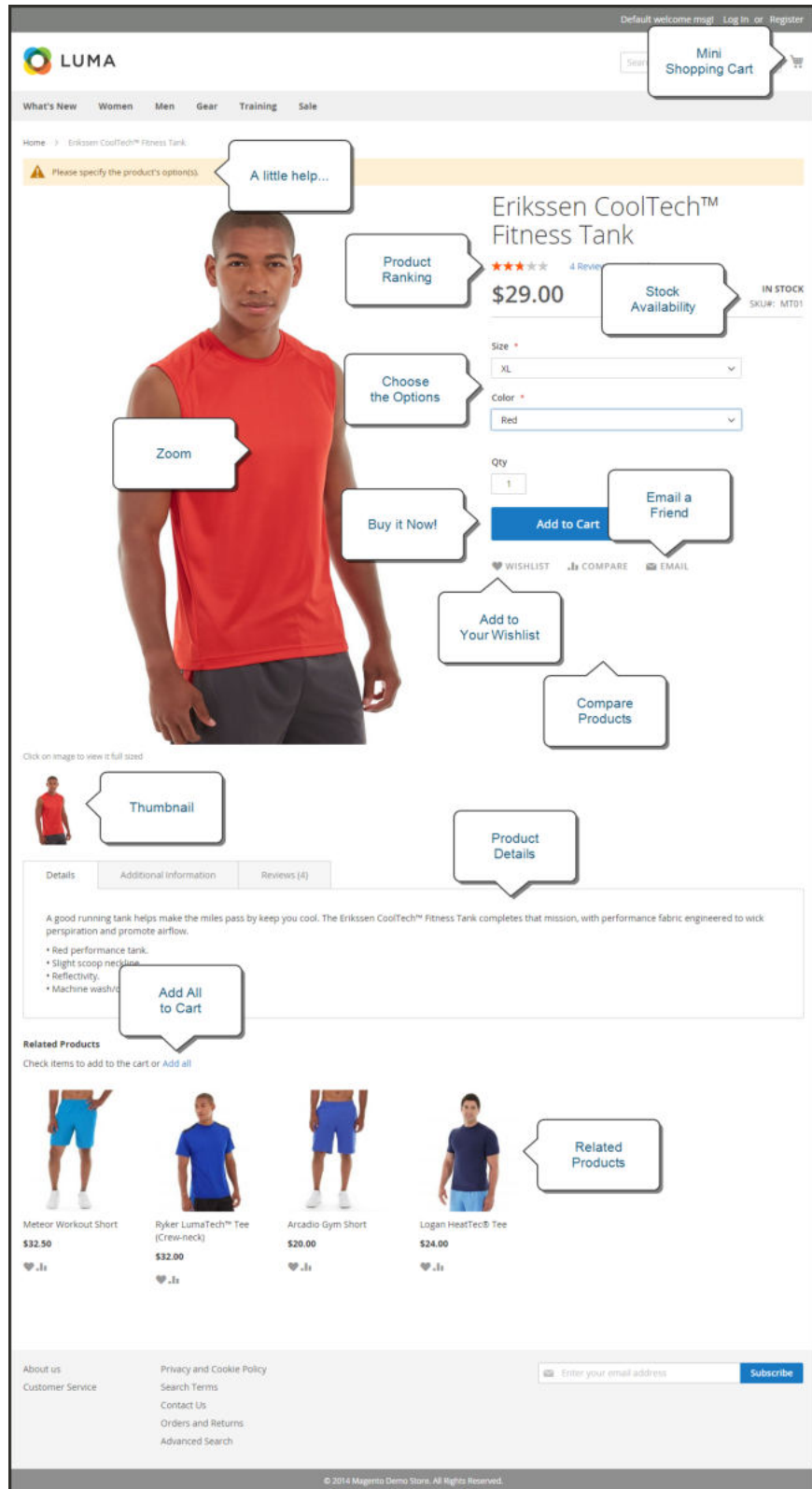
Search Results Page

## Product Page

The product page has a lot going on! The first thing that catches your eye on the product page is the main image with a high-resolution zoom and thumbnail gallery. In addition to the price and availability, there's a tabbed section with more information and a list of related products.

### Callouts

- Mini Shopping Cart
- A little help...
- Product Rating
- Stock Availability
- Choose the Options
- Zoom
- Buy it Now!
- Email a Friend
- Add to Your Wish List
- Compare Products
- Thumbnail
- Product Details
- Add All to Cart
- Related Products



Product Page

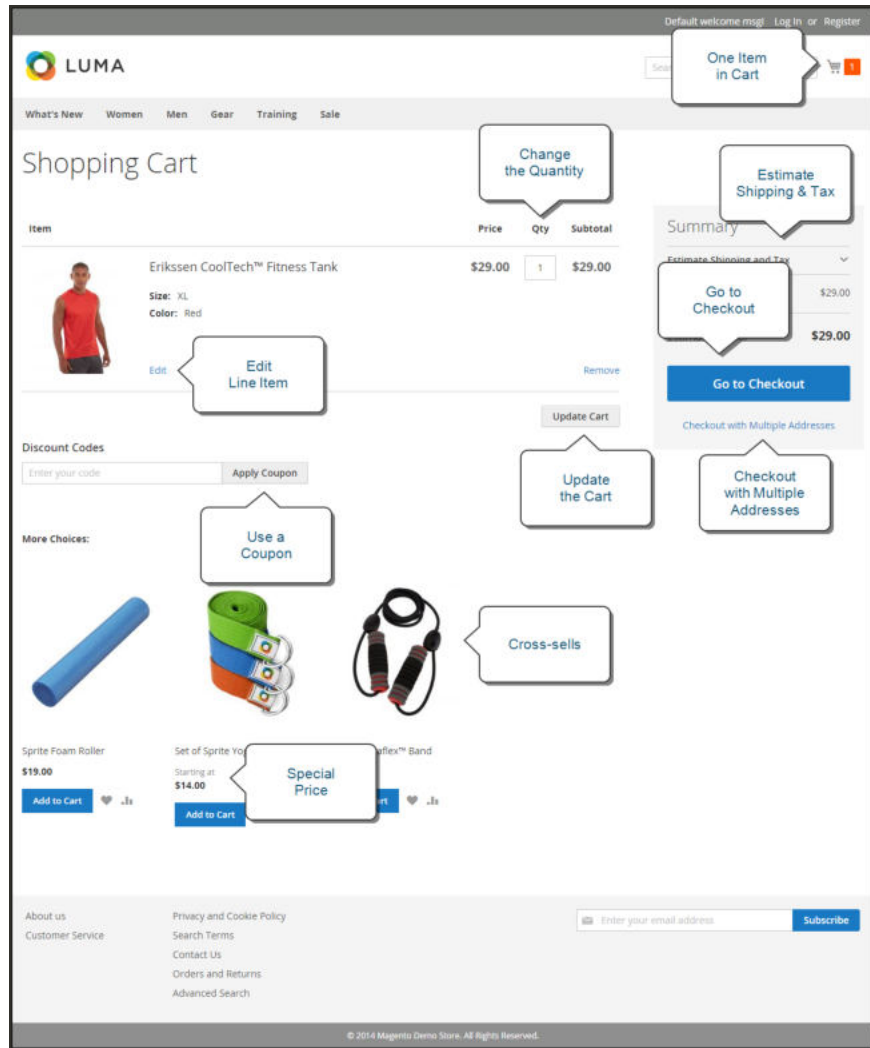
## Shopping Cart

The cart is where order total can be determined, along with discount coupons and estimated shipping and tax, and is a great place to display your trust badges and seals. It's also an ideal opportunity to offer one last item. As a cross-sell, you can select certain items to be offered as an impulse purchase whenever a specific item appears in the cart.

### Callouts

- One Item in Cart
- Change the Quantity
- Estimate Shipping & Tax
- Go to Checkout
- Edit Line Item
- Update the Cart
- Checkout with Multiple Addresses
- Use a Coupon
- Cross-sells
- Special Price





Shopping Cart Page

## Customer Journey



### Attract New Customers

---

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



### Engage Your Customers

---

Design your site with prepared templates, or create a custom design with features that invite people to interact with your store.



### Increase AOV

---

Increase average order value with promotions and content that encourage your customers to shop more.



### Moment of Purchase

---

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



## Customer Retention

---

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



## Loyalty & Advocacy

---

Encourage customers to write product reviews, create wish lists, and send email about products to their friends. Strengthen your relationship with your customers, who in return, speak positively of your business to friends and family.

## Attract New Customers



Magento Open Source is packed with features that make it easy to create a “search engine friendly” websites and increase the likelihood of bringing the right customers to your site.

### Search Engine Optimization

---

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

### Custom URLs

---

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

### Meta Data

---

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

### Sitemap

---

Link to a sitemap from the footer of your store to give customers an overview of the catalog structure, with links to all categories and products in the store. Easy integration with Google Sitemap.

### Analytics

---

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

## Engage Your Customers



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

### Content Management

---

Magento's CMS makes it easy to store pages, or parts of pages, that you can use in your store. Even those without a technology background can create and manage site content.

### Design & Theme

---

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

### Multiple Stores, Sites & Views

---

Control the look and feel of multiple sites, introduce new market and languages, and track analytics from a single Admin.

### Multiple Devices

---

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

### Shopping Tools

---

Your store includes a set of shopping tools that create opportunities for your customers to interact with your store, connect on social media, and share with friends.

### Sophisticated Search

---

Filter product by price, manufacturer, or any other criteria to reduce the time to purchase.

## Increase Average Order Value



Magento Open Source provides a range of tools to help you tailor the shopping experience, and encourage your customers to put more items in their shopping carts and spend more money.

### Targeted Promotions

---

Use catalog and shopping cart price rules to create promotions that kick into gear when a set of conditions is met.

### Coupons

---

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

### Product Suggestions

---

Another way to increase AOV is to offer suggestions for related products and opportunities to up-sell and cross-sell at strategic points along the path to conversion.

### User Permissions & Roles

---

Restrict access to data in the Admin on a “need to know” basis. Create multiple admin roles for read-only or and editing privileges. Track and review all activity at a granular level to specific stores and websites.

## Full-Page Caching

---

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

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

## Index Management

---

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

## Moment of Purchase



Now that you've given your customer an engaging shopping experience, make it easy for them to complete their purchases. Magento is designed to help you streamline your checkout process experience while boosting conversion rates.

### Instant Purchase

---

Simplify ordering and boost conversion rates by allowing your customers to speed through checkout by using stored payment and shipping information.

### Shopping Assistance

---

Assisted shopping makes it easy for customer service reps to create orders for customers.

### Security

---

Whether an order is fulfilled online or over the phone, Magento provides sophisticated security, including **CAPTCHA** and SSL encryption, with best-in-breed encryption and hashing algorithms to protect the security of the system.

### Order Processing

---

Magento supports a complete order processing workflow. It's easy to customize order statuses and track communications between sales reps and customers.

### Multiple Payment Options

---

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

### PayPal Merchant Solutions

---

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

### Magento Shipping

---

Offer seamless access to global carrier networks, and use customer experience rules to streamline operations and automate processes.



## Multiple Shipping Options

---

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

## Shipping Labels

---

Merchants have complete control over package characteristics such as weight and size. Shipping labels, rate, and bar code information originates directly from the carrier. Labels can be generated for single or multiple orders.

## Retain Customers



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

### Email Marketing Automation

---

Send professionally designed, dynamic email campaigns with with live data from your Magento store, powered by [dotdigital](#).

### Custom Coupons

---

Create coupons codes for social media, email, or print campaigns. You can incorporate coupon codes into any design you like.

### Newsletters

---

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

### RSS Feed

---

When RSS feeds are enabled, any additions to products, specials, categories, and coupons are automatically sent to the subscribers of each feed. A link to all RSS feeds that you publish is in the footer of your store.

## Build Loyalty & Advocacy



Give customers a direct connection to your brand by allowing them to create customer accounts where they can see their purchase history, wish list, and newsletter subscriptions. Use product ratings and reviews to give new customers objective product opinions and promote a sense of community. These features turn customer satisfaction into one of the most powerful and cost-efficient marketing tools at your disposal.

### Advanced Reporting

---

Gain valuable insights at a glance with dynamic product, order, and customer reports, powered by Magento Business Intelligence.

### Dashboard Snapshots

---

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

### Customer Accounts

---

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

### Advocacy Tools

---

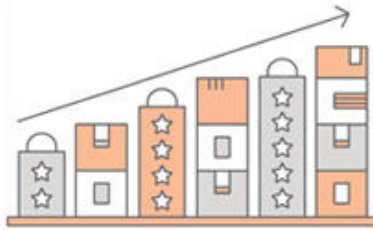
Customers who share **wish lists** make a powerful endorsement of your brand. Wish lists become powerful advocacy tools when shared by email or RSS feed, and gift cards bring motivated new shoppers to your store.

### Reviews & Ratings

---

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

## Success!



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

### Implementation

---

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

### Design

---

You can use a prepared theme and design your own home page, or work with an experienced Magento designer or [Magento Associate](#) to customize your site.

### Product Catalog

---

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

### Payment Methods

---

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

### Shipping Methods

---

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

### Taxes

---

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

### Thanks for your order!

---

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

# Basic Configuration

## Contents

This section of the guide introduces your store's Admin, and walks you through the basic configuration settings. You'll learn the concepts of store hierarchy and configuration scope, and establish best practices for industry standards and requirements.

### Store Admin

- Your Admin Account

- Admin Sidebar

- Admin Workspace

  - Dashboard

  - Message InBox

  - Global Search

  - Grid Controls

  - Actions Control

### Store Details

- Store Information

- Locale Options

- State Options

- Country Options

- Merchant Location

- Currency

- Store Email Addresses

- Contact Us

### Storefront Branding

- Uploading Your Logo

- Uploading a Favicon

- Welcome Message

- Store Demo Notice

- Copyright Notice

### Websites, Stores & Views

- Configuration Scope

- Single Store Mode

### Industry Compliance

- PCI Compliance

- Privacy Policy

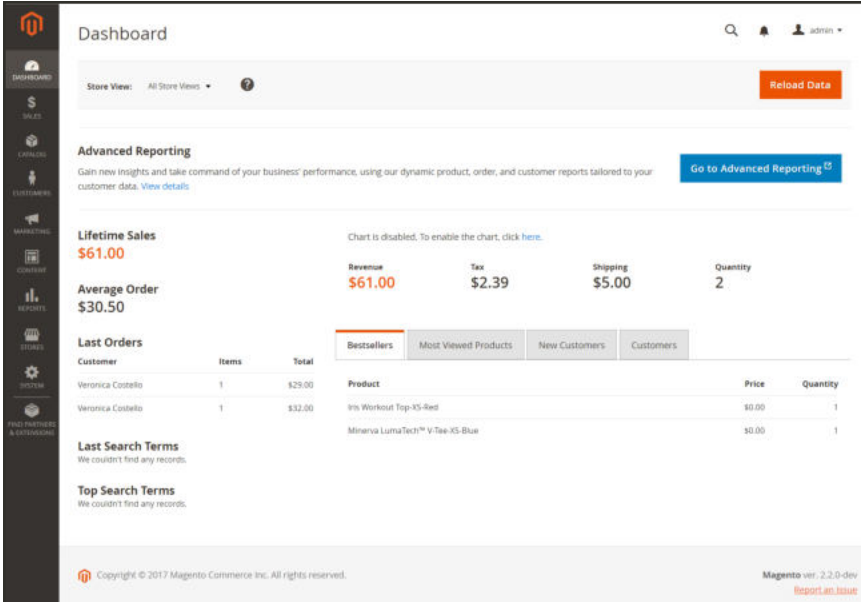
- Cookie Law Compliance

  - Cookie Restriction Mode

  - Cookie Reference

## CHAPTER 5: Store Admin

Your store Admin is the password-protected back office where you, as the merchant, can set up products, promotions, manage orders, and perform other administrative tasks. All basic configuration tasks and store management operations are performed from the Admin.



Dashboard

Store View: All Store Views ? Reload Data

**Advanced Reporting**  
Gain new insights and take command of your business' performance, using our dynamic product, order, and customer reports tailored to your customer data. [View details](#) Go to Advanced Reporting <sup>45</sup>

**Lifetime Sales**  
\$61.00

Chart is disabled. To enable the chart, click [here](#).

Revenue	Tax	Shipping	Quantity
\$61.00	\$2.39	\$5.00	2

**Average Order**  
\$30.50

**Last Orders**

Customer	Items	Total
Veronica Costello	1	\$29.00
Veronica Costello	1	\$32.00

**Bestsellers** | Most Viewed Products | New Customers | Customers

Product	Price	Quantity
19x Workout Top-XS-Red	\$0.00	1
Minerva LumaTech™ V-Top-XS-Blue	\$0.00	1

**Last Search Terms**  
We couldn't find any records.

**Top Search Terms**  
We couldn't find any records.

Copyright © 2017 Magento Commerce Inc. All rights reserved. Magento ver. 2.2.0-dev  
[Report an Issue](#)

*Admin Sidebar and Dashboard*

Your initial sign-in credentials were set up during the Magento installation. If you forget your password, a temporary password can be sent to the email address that is associated with the account. For increased security, you can configure your store to require a case-sensitive user name and password. For additional security, the Admin login can be configured to require a **CAPTCHA**. To learn more, see: [Configuring Admin Security](#).

In addition to the default Admin account, you can create as many **additional accounts** that are needed to manage the store and to support customer accounts. Each account can be associated with a specific **role** and **level of access**, based on the person's business need to know. The email address that is associated with each Admin account must be unique.

## Admin Sign In

You will first learn how to sign in and out of the Admin and how to reset your password. All of the instructions in the rest of this guide are written for a user with full administrative privileges, and begin with the assumption that you are logged in to the Admin. To learn more about Admin users and roles, see [Permissions](#)

The [Advanced Admin](#) configuration determines how many times an admin user can try to log in before the account is locked. By default, six attempts are allowed. To unlock a user account, see: [Locked Users](#).

Depending on Admin configurations, you may also need to resolve a [CAPTCHA](#) or [reCAPTCHA](#) or enter a configured [Two-Factor Authentication](#) code.

When entering your credentials, the username and password may automatically populate if your browser is set to use the autocomplete function. If enabled, you can save your credentials for the Magento Admin login page.



*Admin Sign In*

### To sign in to the Admin:

1. In the address bar of your browser, enter the URL that was specified during the installation, followed by the base URL of your store's Admin. The default Admin URLs look something like this:

```
http://www.yourdomain.com/admin
```

You can bookmark the page or save a shortcut on your desktop for easy access.

2. Enter your Admin **User Name** and **Password**. These values may populate depending on your browser's autocomplete setting.
3. (Optional) You may need to resolve a [CAPTCHA](#) or [reCAPTCHA](#) or enter a configured [Two-Factor Authentication](#) code.
4. Tap **Login**.



### To reset your password:

1. If you forget your password, click the **Forgot Your Password?** link. Then, enter the **Email Address** that is associated with the Admin account.



*Forgot Password*

2. Tap **Retrieve Password**.

If an account is associated with the email address, an email will be sent to reset your password.

Your Admin password must be seven or more characters long and include both letters and numbers.

### To sign out of the Admin:

In the upper-right corner, tap the **Account** (  ) icon. Then on the menu, choose **Sign Out**.



*Sign Out*

The Sign-In page displays, with a message that you are logged out. It's always a good idea to sign out of the Admin whenever you leave your computer unattended.


### Admin Password Requirements

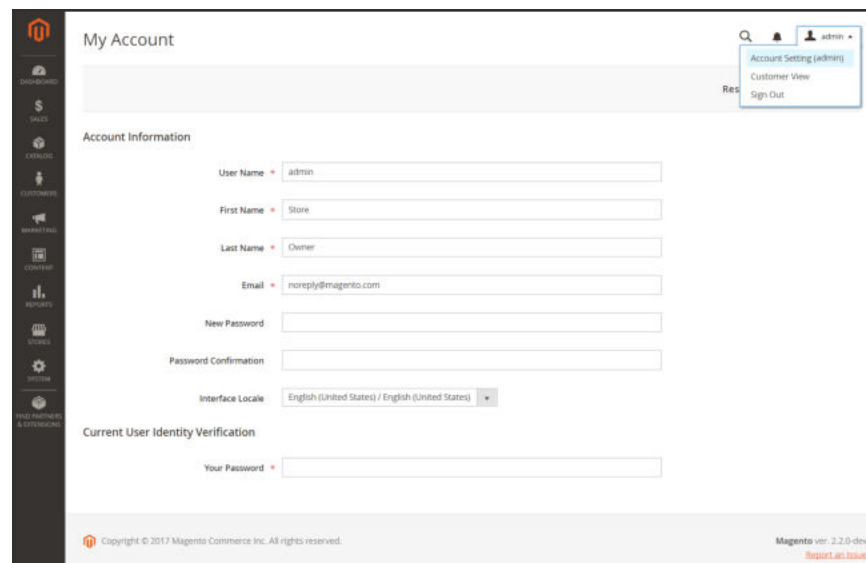
FIELD	DESCRIPTION
Password	An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: <a href="#">Configuring Admin Security</a> .

## Your Admin Account

Your Admin account was initially set up during the installation, and might contain initial placeholder information, or information from the sample data. You can personalize your user name and password, and update your first and last name, and email address at any time. To learn more about Admin accounts and roles, see: [Permissions](#).

### To edit your account information:

1. In the upper-right corner, tap the **Account** (  ) icon. Then, choose **Account Setting**.
2. Make any changes necessary changes to your account information. If you change your login credentials, make sure to write them down.
3. When complete, tap **Save Account**.



The screenshot displays the 'My Account' page in the Magento Admin interface. The page title is 'My Account'. In the top right corner, there is a user profile dropdown menu for 'admin' with options: 'Account Setting (admin)', 'Customer View', and 'Sign Out'. Below this, the 'Account Information' section contains several input fields: 'User Name' (admin), 'First Name' (Store), 'Last Name' (Owner), 'Email' (noreply@magento.com), 'New Password', 'Password Confirmation', and 'Interface Locale' (English (United States) / English (United States)). Below the account information is the 'Current User Identity Verification' section with a 'Your Password' field. The footer of the page includes the copyright notice 'Copyright © 2017 Magento Commerce Inc. All rights reserved.' and the version information 'Magento ver. 2.2.0-dev' with a 'Report an Issue' link.

*Account Information*

## Admin Sidebar

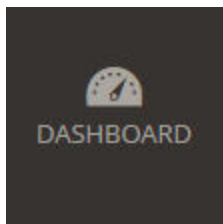
The sidebar on the left is the main menu for your store's Admin, and is designed for both desktop and mobile devices. The flyout menu provides access to all the tools you need to manage your store on a daily basis.



### Admin Startup Page

---

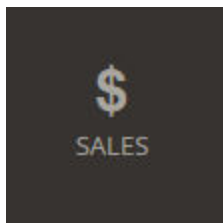
Displays the Admin startup page, which by default is the Dashboard.



### Dashboard

---

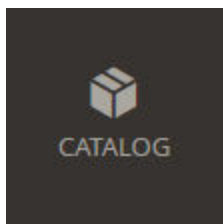
The Dashboard provides a quick overview of the sales and customer activity in your store, and is usually the first page that appears when you log in to the Admin.



### Sales

---

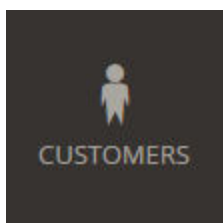
The Sales menu is where you can find everything related to the operations of processing orders, invoices, shipments, credit memos, and transactions.



### Catalog

---

The Catalog menu is used to create products and define categories.



### Customers

---

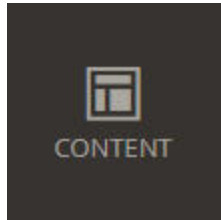
The Customers menu is where you can manage customer accounts, and see which customers are online at the moment.



## Marketing

---

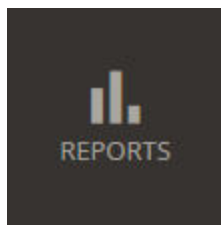
The Marketing menu is where you set up catalog and shopping cart price rules and coupons. Price rules trigger actions when a set of specific conditions is met.



## Content

---

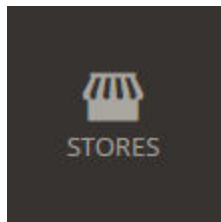
The Content menu is where you manage the content elements and design of your store. You will learn how to create pages, blocks, and frontend apps, and manage the presentation of your store.



## Reports

---

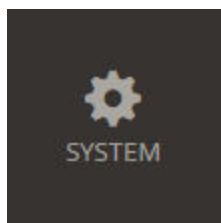
The Reports menu provides a broad selection of reports that give you insight into every aspect of your store, including sales, shopping cart, products, customers, tags, reviews, and search terms.



## Stores

---

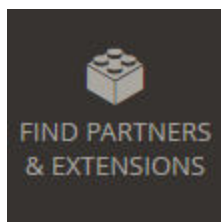
The Stores menu includes tools to configure and maintain every aspect of your store, including multisite installation settings, taxes, currency, product attributes, and customer groups.



## System

---

The System menu includes tools to manage system operations, install extensions, and manage Web Services for integration with other applications.



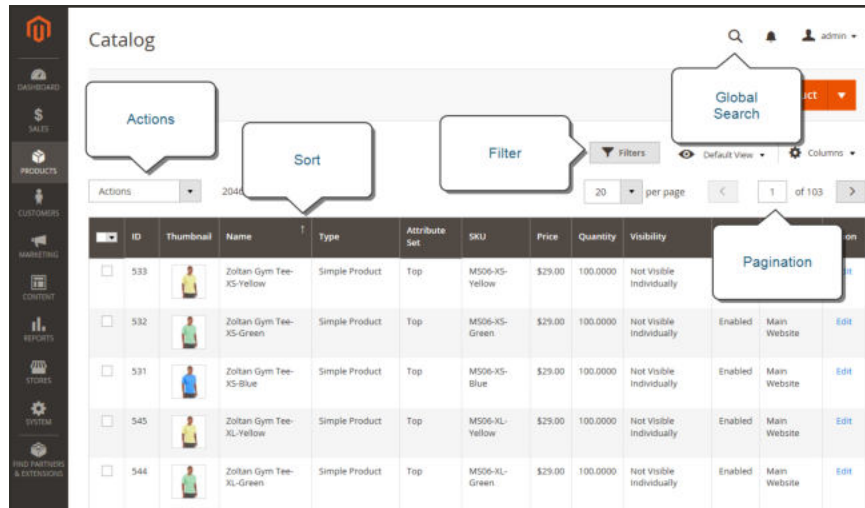
## Find Partners & Extensions

---

This is where you can find a marketplace Magento Partners and solutions for your store.

## Admin Workspace

The Admin workspace provides access to all the tools, data, and content that you need to run your store. The default start up page can be set in the configuration. Many Admin pages have a grid that lists the data for the section, with a set of tools to search, sort, filter, select, and apply actions. By default, the Dashboard is the startup page for the Admin. However, you can choose any other page to appear as the startup page when you log in. You can tap the Magento logo in the Admin sidebar to return to the Admin startup page.



Admin Workspace

### To change the Admin startup page:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand ☺ the **Startup Page** section.
4. Set **Startup Page** to the page that you want to appear first after you log in to the Admin.



Startup Page

5. When complete, tap **Save Config**.

## Workspace Controls

CONTROL	DESCRIPTION
Search	The Global Search box can be used to find any value in the database, including product, customer, and order records.
Sort	The header of each column can be used to sort the list in ascending or descending order.
Filters	<p>Defines a set of search parameters that determines the records that appear in the grid.</p> <p>In addition, the filters in the header of some columns can be used to limit the list to specific values. Some filters have additional options that can be selected from a list box, and for others, you can simply type the value you want to find.</p>
Default View	Determines the default column layout of the grid.
Columns	Determines the selection of columns and their order in the grid. The column layout can be changed, and saved as a “view.” By default, only some of the columns are included in the grid.
Paginate	The pagination controls are used to view the additional pages of results.
Actions	The Actions control applies an operation to all selected records. To select individual records, mark the checkbox in the first column of each row, or use the Select control.
Select	The Select control is used to select multiple records that are to be the target of action. Options: Select All / Deselect All

## Potential Startup Pages

SIDEBAR	PAGES	
	<b>Dashboard</b>	
Sales	Operations	<b>Orders</b> <b>Invoices</b> <b>Shipments</b> <b>Credit Memos</b> <b>Billing Agreements</b> <b>Transactions</b>
Catalog	<b>Products</b> <b>Categories</b>	

**Potential Startup Pages (cont.)**

SIDEBAR	PAGES	
Customers	<ul style="list-style-type: none"> <li>All Customers</li> <li>Now Online</li> </ul>	
Marketing	<ul style="list-style-type: none"> <li>Promotions</li> <li>Communications</li> </ul>	<ul style="list-style-type: none"> <li>Catalog Price Rules</li> <li>Cart Price Rules</li> <li>Email Templates</li> <li>Newsletter Template</li> <li>Newsletter Queue</li> <li>Newsletter Subscribers</li> </ul>
	<ul style="list-style-type: none"> <li>SEO &amp; Search</li> <li>User Content</li> </ul>	<ul style="list-style-type: none"> <li>URL Rewrites</li> <li>Search Terms</li> <li>Search Synonyms</li> <li>Site Map</li> <li>Reviews</li> </ul>
Content	<ul style="list-style-type: none"> <li>Elements</li> <li>Design</li> <li>Content Staging</li> </ul>	<ul style="list-style-type: none"> <li>Pages</li> <li>Blocks</li> <li>Widgets</li> <li>Configuration</li> <li>Themes</li> <li>Schedule</li> <li>Dashboard</li> </ul>
Reports	<ul style="list-style-type: none"> <li>Marketing</li> <li>Reviews</li> <li>Sales</li> </ul>	<ul style="list-style-type: none"> <li>Products in Cart</li> <li>Search Terms</li> <li>Abandoned Carts</li> <li>Newsletter Problem Reports</li> <li>By Customers</li> <li>By Products</li> <li>Orders</li> <li>Tax</li> <li>Invoiced</li> </ul>

## Potential Startup Pages (cont.)

SIDEBAR	PAGES
	Shipping
	Refunds
	Coupons
	PayPal Settlement
	Braintree Settlement
Customers	Order Total
	Order Count
	New
	Wish Lists
Products	Views
	Bestsellers
	Low Stock
	Ordered
	Downloads
Statistics	Refresh Statistics
Business Intelligence	Advanced Reporting
	BI Essentials
Stores	Settings
	All Stores
	Configuration
	Terms and Conditions
	Order Status
	Taxes
	Tax Rules
	Tax Zones and Rates
	Currency
	Currency Rates
	Currency Symbols
	Attributes
	Product
	Attribute Set
	Rating
	Other Settings
	Customer Groups



Potential Startup Pages (cont.)

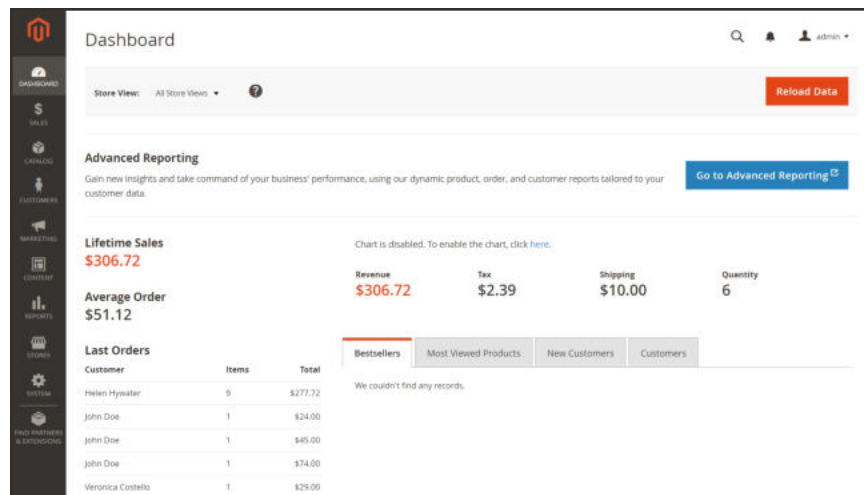
SIDEBAR	PAGES	
System	Data Transfer	Import
		Export
		Import/Export Tax Rates
		Import History
	Extensions	Integrations
	Tools	Cache Management
		Index Management
		Backups
		Web Setup Wizard
	Permissions	All Users
Locked Users		
User Roles		
Action Logs		
Other Settings	Notifications	
	Custom Variables	
	Manage Encryption Key	
<hr/>		
Find Partners & Extensions		

## Dashboard

The dashboard is usually the first page that appears when you log in to the Admin, and gives an overview of sales and customer activity. The blocks on the left provide a snapshot of lifetime sales, average order amount, the last five orders, and search terms. The graph shows the orders and amounts for the selected date range. You can use the tabs above the graph to toggle between the two views. The tabs at the bottom provide quick reports about your best-selling and most viewed products, new customers and those who have purchased the most.

The dashboard is the default **startup page** for the Admin, although you can change the configuration to display a different page when you log in. You can also set the starting dates used in dashboard reports, and disable the display of the charts section.

You can produce Dashboard snapshot reports for each store view. The tabs at the bottom of the page summarize your best-selling and most viewed products, new customers, and those who have purchased the most during the time period specified.



*Dashboard*

### To configure the chart:

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**. Then, do any of the following:

#### Enable Charts

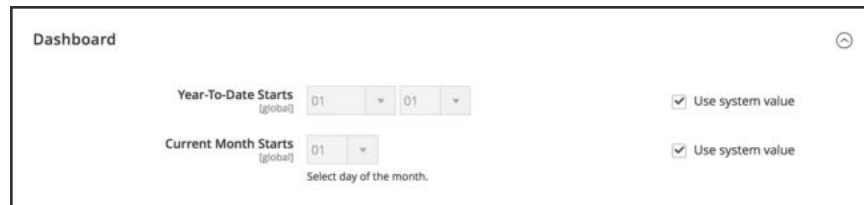
1. In the panel on the left, under **Advanced**, choose **Admin**.
2. In the Dashboard section, clear the **Use system value** checkbox and set **Enable Charts** to “Yes.”



*Enable Charts*

#### Set the Beginning Dates

1. In the panel on the left under General, choose **Reports**.
2. In the Dashboard section do the following:
  - a. Clear the **Use system value** checkboxes.
  - b. Set **Year-To-Date Starts** to the **Month** and **Day**.
  - c. Set **Current Month Starts** to the **Day**.

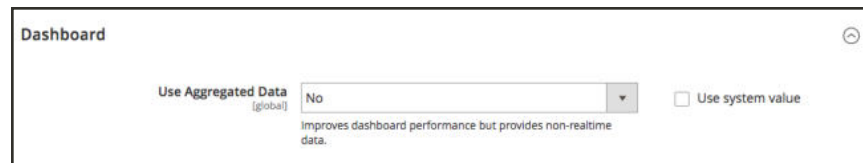


*Beginning Date*

## Choose the Data Source

If you have a lot of data to process, the performance of the Dashboard can be improved by turning off the display of real time data.

1. In the panel on the left, tap to expand **Sales**. Then, choose **Sales**.
2. Tap to expand the **Dashboard** section, and do the following:
  - a. Clear the **Use system value** checkbox.
  - b. Set **Use Aggregated Data (beta)** as follows:
    - For real-time data, choose "Yes."
    - For historical data, choose "No."



*Data Source*

## Change the Startup Page

1. In the panel on the left, tap to expand **Advanced**. Then, choose **Admin**.
2. Tap to expand the **Startup Page** section.
3. Clear the **Use system value** checkboxes.
4. Choose the **Startup Page** that you want to appear when you log in to the Admin. The list includes every page in the Admin menu structure.



*Startup Page*

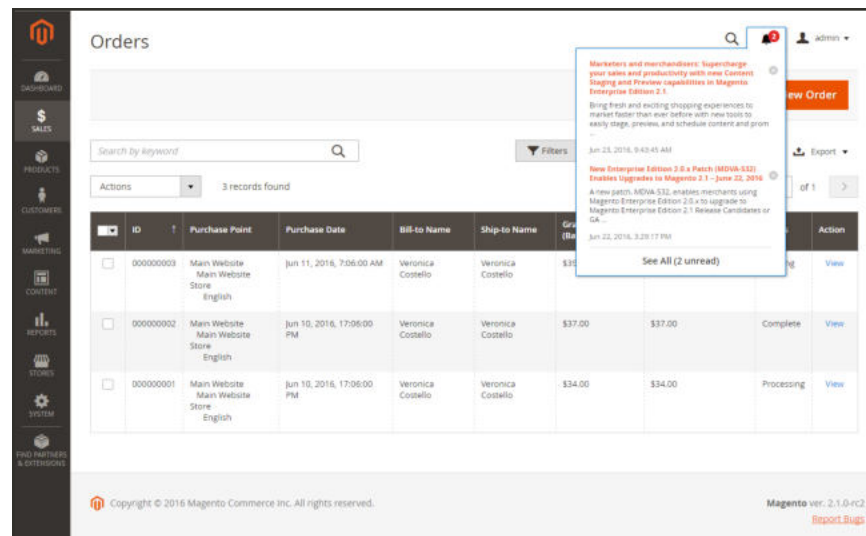
2. When complete, tap **Save Config**.

## Dashboard Reports

REPORT	DESCRIPTION
Sales	The Dashboard reports on Lifetime Sales, Revenue, Tax, Shipping, and Quantity for the time period specified.
Orders	The Orders tab at the top displays a chart of all orders during the specified time period. Below the chart is the total revenue, tax, shipping, and quantity ordered. The lifetime sales amount and the last five orders are on the left.
Amounts	The Amounts tab at the top displays a chart of all order amounts during the specified time period. The average order amount and the last five orders are on the left.
Search Terms	The last five search terms, and top five search terms appear on the left.
Products	The Bestsellers tab shows the price and quantity ordered of your best-selling products. The products that have been viewed the most during the specified time period are listed on the Most Viewed Products tab.
Customers	The Customers tab at the bottom lists the customers who have ordered the most during the specified range of time. The New Customers tab lists all new customers who have registered for an account during the time period. On the left, the Last Orders section lists the most recent orders by customer.

## Message Inbox

Your store receives messages from Magento on a regular basis. The messages might refer to system updates, patches, new releases, scheduled maintenance or upcoming events, and are rated by importance. The bell icon in the header indicates the number of unread messages in your inbox.



### Incoming Messages

Any message of critical importance appears in a pop-up window when you log into your store. The notice continues to appear after each login until the message is either marked as read, or removed.



### Message of Critical Importance

The Notifications grid lists all messages ranked by severity, with the most recent at the top. The Action commands can be used to mark individual messages as read, view more detailed information, or to remove the message from the inbox.

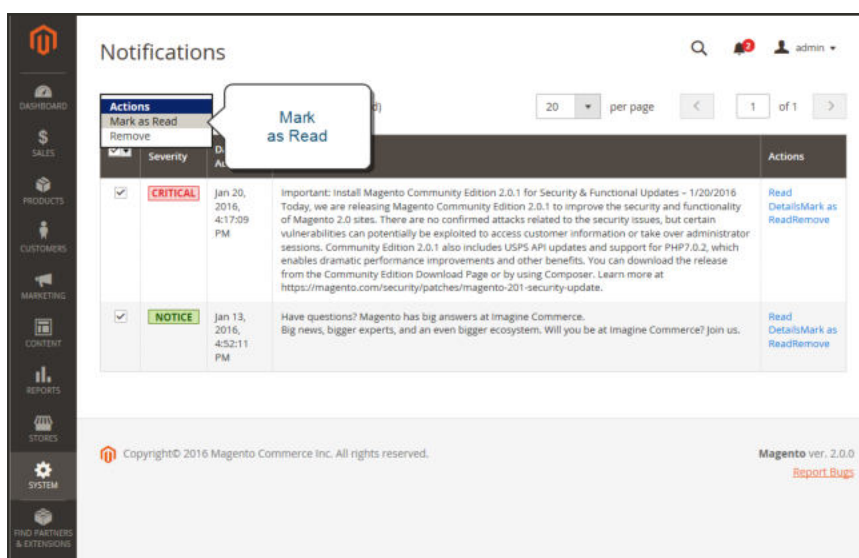
The configuration determines how often the inbox is updated, and how the messages are delivered. If your store Admin has a secure URL, notifications must be delivered over HTTPS.

### To view incoming messages:

1. Tap the **Notification** icon in the header, and read the summary. Then, do one of the following:
  - If necessary, tap the message to display the full text.
  - To delete the message, tap the delete icon to the right of the message.
  - To display the Notifications grid, click **See All**.
2. For a message of critical importance, do one of the following:
  - Click **Read Details**.
  - To remove the popup, but keep the message active, tap **Close**.

### To view all notifications:

1. Do one of the following:
  - Tap the **Notification** icon in the header. Then in the footer of the summary, click **See All**.
  - On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Notifications**.
2. In the **Action** column, do any of the following:
  - For more information, tap **Read Details**. The linked page opens in a new window.
  - To keep the message in your inbox, tap **Mark As Read**.
  - To delete the message, tap **Remove**.



*All Notifications*

3. To apply an action to multiple messages, do one of the following:
  - Mark the checkbox in the first column to select each message to be managed.
  - To select multiple messages, set the **Mass Actions** control as needed.
4. Set the **Actions** control to one of the following:
  - Mark as Read
  - Remove
5. Tap **Submit** to complete the process.

### To configure notifications:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Scroll down, and in the panel on the left under **Advanced**, choose **System**.
3. Expand ☺ the **Notifications** section, and do the following:
  - a. If your store Admin runs over a **secure URL**, set **Use HTTPS to Get Feed** to “Yes.”
  - b. Set **Update Frequency** to determine how often your inbox is updated. The interval can be from one to twenty-four hours.



Setting	Value	Use system value
Use HTTPS to Get Feed [global]	No	<input checked="" type="checkbox"/>
Update Frequency [global]	1 Hour	<input checked="" type="checkbox"/>
Last Update [global]	Jun 9, 2017 11:35:17 AM	

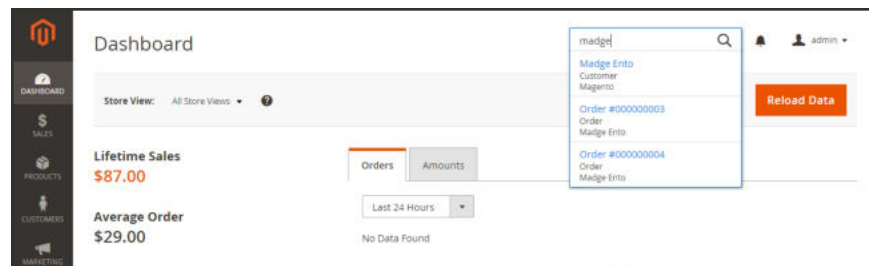
### *Notifications*

4. When complete, tap **Save Config**.



## Global Search

The magnifying glass in the header of the Admin can be used to find any record in the database. The results can include customers, products, orders, or any related attribute. For example, if you enter a customer name, the results might include the customer record as well as any orders that are associated with the name.



*Search*

### To find a match:

1. In the header, tap the **magnifying glass** (🔍) to open the search box. Then, do one of the following:
  - To find a close match, enter the first few letters of what you want to find.
  - To find an exact match, enter the word, or multiple words that you want to find.
2. In the search results, click any item to open the record.

## Grid Controls

Admin pages that manage data display a collection of records in a grid. The controls at the top of each column can be used to sort the data. The current sort order is indicated by an ascending or descending arrow in the column header. You can specify which columns appear in the grid, and drag them into different positions. You can also save different column arrangements as views that can be used later. The Action column lists operations that can be applied to an individual record. In addition, data from the current view of most grids can be exported to a [CSV](#) or XML file.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000002	Main Website Main Website Store Default Store View	Nov 12, 2015 5:41:55 PM	Veronica Costello	Veronica Costello	\$61.00	\$61.00	Closed	View
000000001	Main Website Main Website Store Default Store View	Nov 12, 2015 5:41:54 PM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	View

*Orders Grid*

### To sort the list:

1. Tap any column header. The arrow indicates the current order as either ascending or descending.
2. Use the pagination controls to view additional pages in the collection.

### To paginate the list:

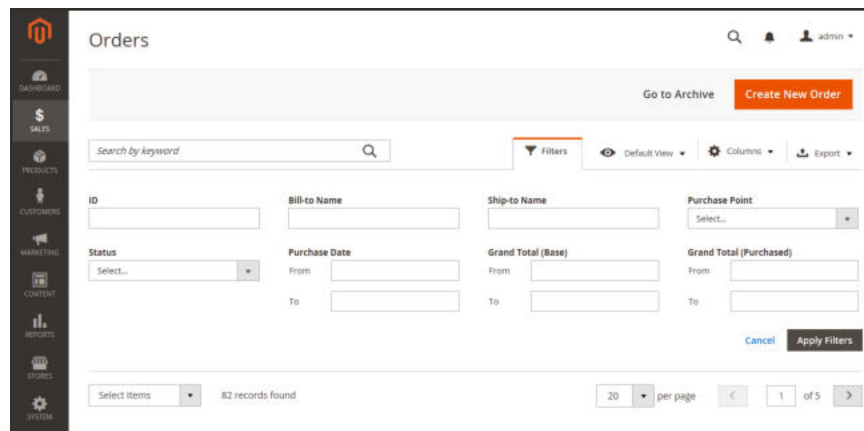
1. Set the **Pagination** control to the number of records that you want to view per page.
2. Tap **Next** and **Previous** to page through the list, or enter a specific **Page Number**.



*Next and Previous*

### To filter the list:

1. Tap **Filters**.
2. Complete as many filters as necessary to describe the record you want to find.
3. Tap **Apply Filters**.



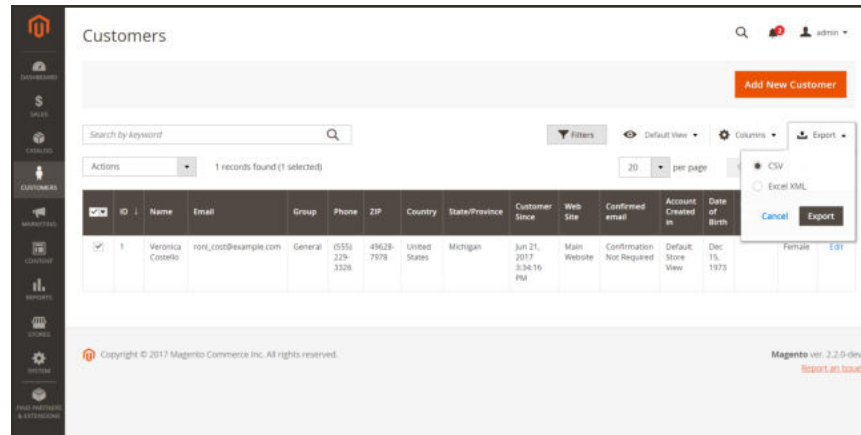
*Filter Controls*

### To export data:

1. Select the records that you want to export.

Product data cannot be exported from the grid. To learn more, see [Export](#).

2. On the **Export** (📄) menu in the upper-right corner, choose one of the following file formats:
  - CSV
  - Excel XML

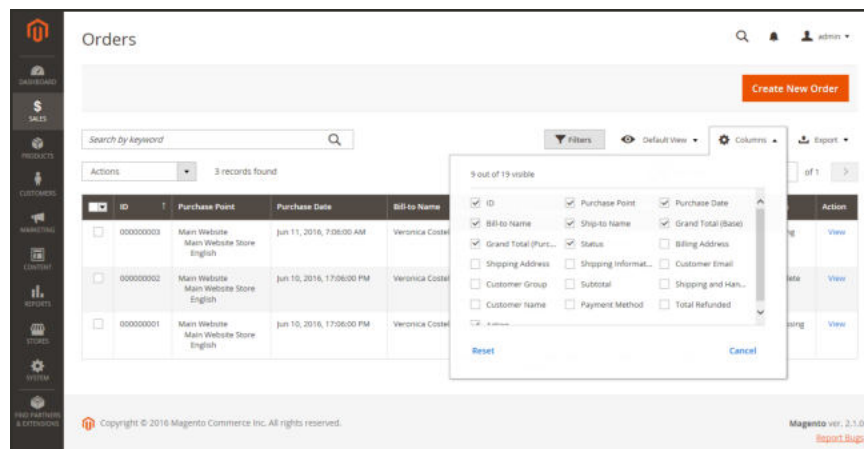


*Export Control*

3. Tap **Export**.
4. Look for the downloaded file of exported data at the bottom of your browser window. Then, open the file from the pop-up menu.

## Grid Layout

The selection of columns and their order in the grid can be changed according to your preference, and saved as a “view.” By default, only nine of twenty available columns are visible in the grid.



*Order Grid Columns*

### To change the selection of columns:

1. In the upper-right corner, tap the **Columns** (✳) control. Then, do the following:
  - Mark the checkbox of any column you want to add to the grid.
  - Clear the checkbox of any column you want to remove from the grid.
2. Make sure to scroll down to see all available columns.

### To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

### To save a grid view:

1. Tap the **View** (👁) control. Then, tap **Save Current View**.
2. Enter a **name** for the view. Then, click the **arrow** (➔) to save all changes.

The name of the view now appears as the current view.

### To change the grid view:

Tap the **View** (👁) control. Then, do one of the following:

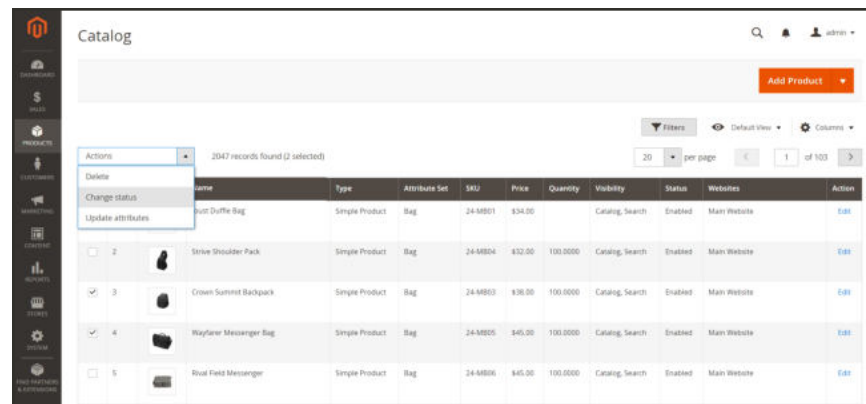
- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** (✎) icon. Then, update the name.

## Actions Control

When working with a collection of records in the grid, you can use the Actions control to apply an operation to one or more records. The Actions control lists each operation that is available for the specific type of data. For example, for product records, you can use the Actions control to update the attributes of selected products, change the status from “Disabled” to “Enabled,” or to delete records from the database. .

You can make as many changes as necessary, and then update the records in a single step. It’s much more efficient than changing the settings individually for each product.

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



*Applying an Action to Selected Records*

### Step 1: Select Records

The checkbox in the first column of the list identifies each record that is a target for the action. The **filter controls** can be used to narrow the list to the records you want to target for the action.

1. Mark the checkbox of each record that is a target for the action. Or, use one of the following Actions to select a group of records:
  - Select All / Unselect All
  - Select All on This Page/ Deselect All on This Page
2. If needed, set the filters at the top of each column to show only the records that you want to include.

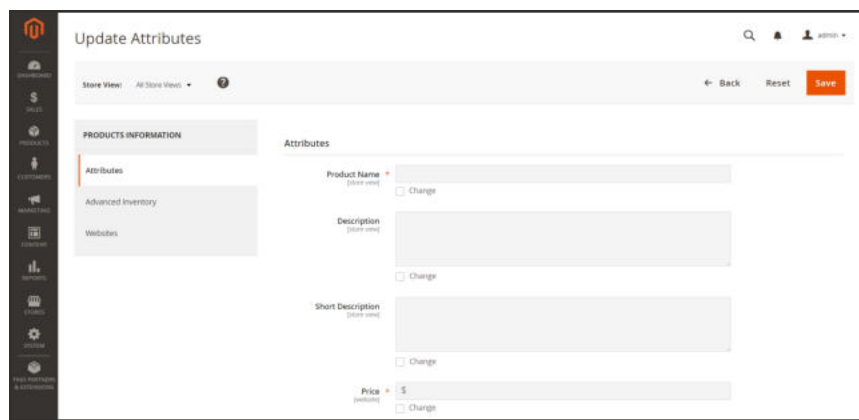
## Step 2: Apply an Action to Selected Records

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

### Example: Update Attributes

1. In the list, mark the checkbox of each record to be updated.
2. Set the **Actions** control to “Update Attributes,” and tap **Submit**.

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



*Update Attributes*

3. Mark the **Change** checkbox next to each attribute, and make the necessary changes.
  4. Tap **Save** to update the attributes for the group of selected records.
2. When complete, tap **Submit**.

**Actions**

<b>ACTION</b>	<b>DESCRIPTION</b>
Select All	Marks the checkbox of all records in the list.
Unselect All	Clears the checkbox of all records in the list.
Select All on This Page	Marks the checkbox of records on the current page.
Deselect All on This Page	Clears the checkbox of records on the current page.

**Actions by Grid**

<b>MENU</b>	<b>LIST</b>	<b>ACTIONS</b>
<b>SALES</b>		
	Orders	Cancel Hold Unhold Print Invoices Print Packing Slips Print Credit Memos Print All Print Shipping Labels
	Invoices	PDF Invoices
	Shipments	PDF Shipments Print Shipping Labels
	Credit Memos	PDF Credit Memos
<b>PRODUCTS</b>		
	Catalog	Delete Change Status Update Attributes
<b>CUSTOMERS</b>		
	All Customers	Delete Subscribe to Newsletter Unsubscribe from Newsletter Assign a Customer Group



**Actions by Grid (cont.)**

MENU	LIST	ACTIONS
		Edit
<b>MARKETING</b>		
<b>Communications</b>		
	Newsletter Subscribers	Unsubscribe Delete
<b>SEO &amp; Search</b>		
	Search Synonyms	Delete
	Search Terms	Delete
<b>User Content</b>		
	Reviews	Delete Update Status
<b>CONTENT</b>		
<b>Elements</b>		
	Pages	Delete Disable Enable Edit
	Blocks	Delete Edit
<b>REPORTS</b>		
	Refresh Statistics	Refresh Lifetime Statistics Refresh Statistics for the Last Day
<b>STORES</b>		
<b>Settings</b>		
	Order Status	Unassign

**Actions by Grid (cont.)**

MENU	LIST	ACTIONS
<b>SYSTEM</b>		
<b>Tools</b>		
	Cache Management	Enable Disable Refresh
	Backups	Delete
	Index Management	Update on Save Update by Schedule
<b>Other Settings</b>		
	Notifications	Mark as Read Remove

## Admin Session Lifetime

As a security measure, the Admin is initially set to time out after 900 seconds, or fifteen minutes of keyboard inactivity. However, you can adjust the lifetime of the session to fit your work style.

### To set the session lifetime:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand ☺ the **Security** section.
4. In the **Admin Session Lifetime (seconds)** field, enter the number of seconds that a session remains active before it times out.

**Security**

**Admin Account Sharing** [store view] No  Use system value  
If set to Yes, you can log in from multiple computers into same account. Default setting No improves security.

**Password Reset Protection Type** [store view] By IP and Email  Use system value

**Recovery Link Expiration Period (hours)** [global] 2  Use system value  
Please enter a number 1 or greater in this field.

**Max Number of Password Reset Requests** [store view] 5  Use system value  
Limit the number of password reset request per hour. Use 0 to disable.

**Min Time Between Password Reset Requests** [store view] 10  Use system value  
Delay in minutes between password reset requests. Use 0 to disable.

**Add Secret Key to URLs** [global] No  Use system value

**Login is Case Sensitive** [global] No

**Admin Session Lifetime (seconds)** [global] 900  Use system value  
Please enter at least 60 and at most 31536000 (one year).

**Maximum Login Failures to Lockout Account** [global] 6  Use system value  
We will disable this feature if the value is empty.

**Lockout Time (minutes)** [global] 30  Use system value

**Password Lifetime (days)** [global] 90  Use system value  
We will disable this feature if the value is empty.

**Password Change** [global] Forced  Use system value

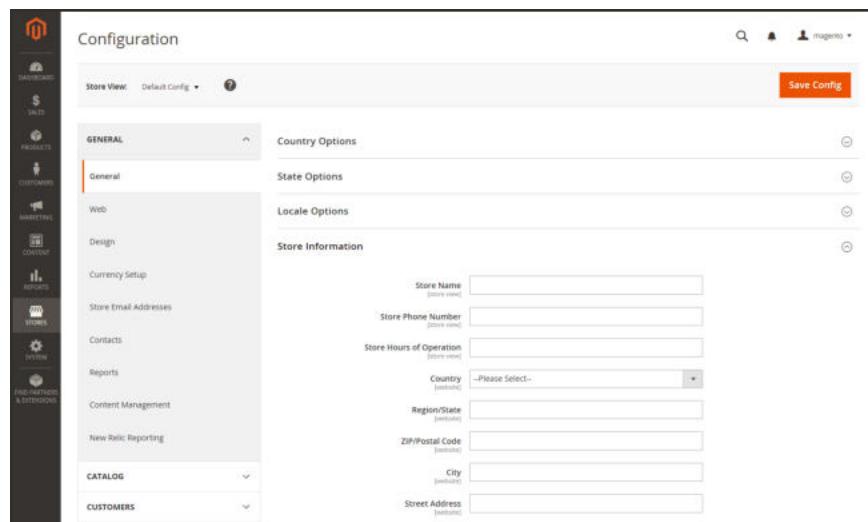
*Security*

- When complete, tap **Save Config.**



## CHAPTER 6: Store Details

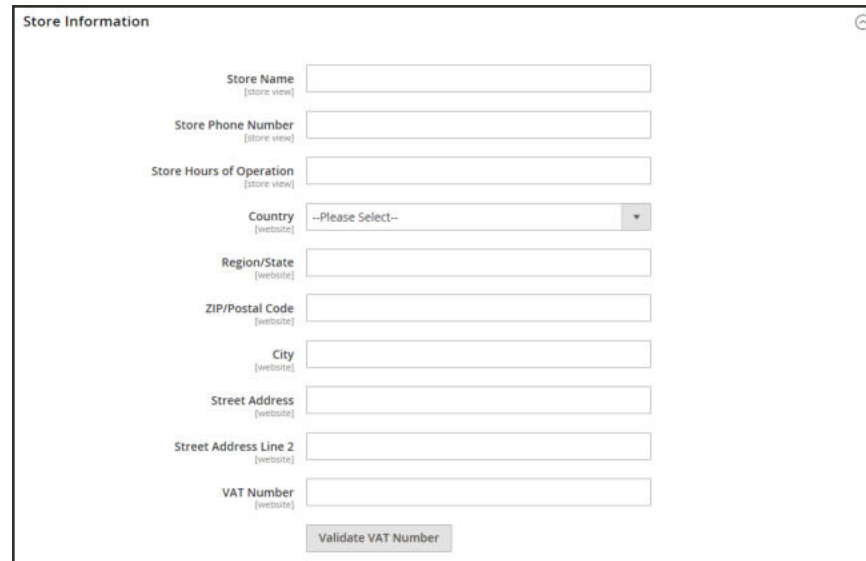
The basic information for your store includes the store name and address, telephone number and email address, that appear on email messages, invoices, and other communications sent to your customers.



*General Configuration*

## Store Information

The Store Information section provides the basic information that appears on sales documents and in other communications.



The screenshot shows a form titled "Store Information" with a close button in the top right corner. The form contains the following fields:

- Store Name [store view]
- Store Phone Number [store view]
- Store Hours of Operation [store view]
- Country [website] (dropdown menu with "--Please Select--")
- Region/State [website]
- ZIP/Postal Code [website]
- City [website]
- Street Address [website]
- Street Address Line 2 [website]
- VAT Number [website]

At the bottom of the form is a button labeled "Validate VAT Number".

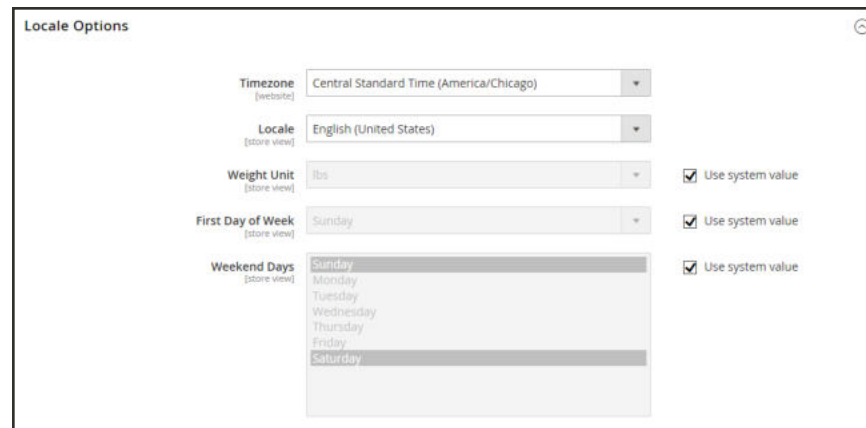
*Store Information*

**To enter your store information:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand ☺ the **Store Information** section, and do the following:
  - a. Enter the **Store Name** that you want to use in all communications.
  - b. Enter the **Store Phone Number**, formatted as you want it to appear.
  - c. In the **Store Hours of Operation** field, enter the hours your store is open for business. For example: Mon - Fri, 9-5, Sat 9-noon PST.
  - d. Select the **Country** where your business is located.
  - e. Select the **Region/State** with the country.
  - f. Enter the **Store Address**. If the address is long, continue the address on **Store Address Line 2**.
  - g. If applicable, enter the **VAT Number** of your store. To verify the number, click the **Validate VAT Number** button. To learn more, see: [VAT ID Validation](#).
4. When complete, tap **Save Config**.


## Locale Options

The locale determines the language, country, tax rate, and other settings that are used throughout the store. The Locale Options determine the time zone and language used for each store, and identify the days of the work week in your area.



*Locale Options*

### To set the store locale:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand  the **Locale Options** section.
4. Select your **Timezone** from the list. Then, do the following:
  - a. Set **Locale** to the store language.
  - b. Set **Weight Unit** to the unit of measurement that is typically used for shipments from your locale.
  - c. Set **First Day of the Week** to the day that is considered to be the first day of the week in your area.
  - d. In the **Weekend Days** list, select the days which fall on a weekend in your area. (To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.)
5. When complete, tap **Save Config**.



## State Options

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

Because standard address formats vary from one country to another, you can also edit the template that is used to format the address for invoices, packing slips, and shipping labels.

*State Options*

### To set up the state options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand ☺ the **State Options** section, and do the following:
  - a. In the **State is required for** list, select each country where Region/State is a required entry.
  - b. Set the **Allow to Choose State if It is Optional for Country** field to one of the following:
 

Yes	In countries where the state field is not required, includes the State field as an optional entry.
No	In countries where the state field is not required, omits the State field.
4. When complete, tap **Save Config**.

## Country Options

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

The screenshot shows the 'Country Options' configuration page. It features five sections, each with a dropdown menu and a 'Use system value' checkbox:

- Default Country** [store view]: United States (selected).  Use system value
- Allow Countries** [website]: Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda.  Use system value
- Zip/Postal Code is Optional for** [global]: Guam, Guatemala, Guernsey, Guinea, Guinea-Bissau, Guyana, Haiti, Heard Island and McDonald Islands, Honduras, Hong Kong SAR China.  Use system value
- European Union Countries** [global]: Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina, Armenia, Aruba, Australia, Austria.  Use system value
- Top destinations** [global]: Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda.

*Country Options*

### To set the country options for your store:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand ☺ the **Country Options** section, and do the following:
  - a. Choose the **Default Country** where your business is located.
  - b. In the **Allow Countries** list, select each country from which you accept orders. By default, all countries in the list are selected. To select multiple countries, hold down the Ctrl (PC) or Command (Mac) key.
  - c. In the **Zip/Postal Code is Optional for** list, select each country where you conduct business that does not require a ZIP or postal code to be included as part of the street address.
  - d. In the **European Union Countries** list, select each country in the EU where you conduct business. By default, all EU countries are selected.
  - e. In the **Top Destinations** list, select the primary countries that you target for sales.
4. When complete, tap **Save Config**.

## Merchant Location

The Merchant Location setting is used to configure **payment methods**. If no value is entered, the **Default Country** setting is used.

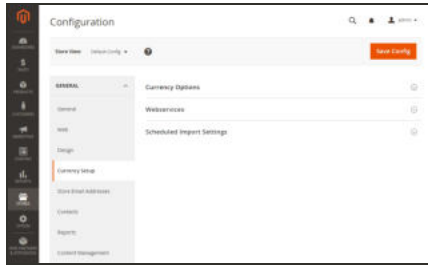


### *Merchant Location*

#### To enter the merchant location:

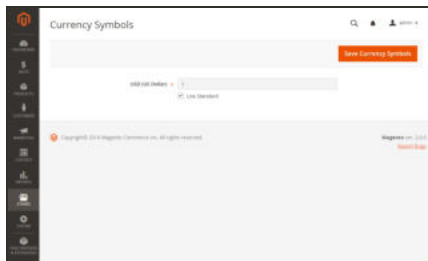
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Merchant Location** section. Then, choose your **Merchant Country**.
4. When complete, tap **Save Config**.

# Currency



## Currency Setup

Defines the base currency and any additional currencies that are accepted as payment. Also establishes the import connection and schedule that is used to update currency rates automatically.



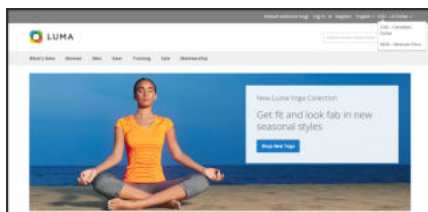
## Currency Symbols

Defines the currency symbols that appear in product prices and sales documents such as orders and invoices. Magento support currencies from over two hundred countries around the world.



## Updating Currency Rates

Currency rates can be updated manually or imported into your store as needed, or according to a predefined schedule.



## Currency Chooser

If multiple currencies are available, the currency chooser appears in the header of the store.

## Store Email Addresses

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

- General Contact
- Sales Representative
- Customer Support

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

### Process Overview:

Step 1: [Set Up the Email Addresses for Your Domain](#)

Step 2: [Configure the Email Addresses for Your Store](#)

Step 3: [Update the Sales Email Configuration](#)

### Step 1: Set Up the Email Addresses for Your Domain

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

### Step 2: Configure the Email Addresses for Your Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Store Email Addresses**.
3. Expand ☺ the **General Contact** section, and do the following:

The screenshot shows a configuration panel titled 'General Contact'. It contains two rows of settings:

- Sender Name** (store view): Input field contains 'Owner'. To the right is a checked checkbox labeled 'Use system value'.
- Sender Email** (store view): Input field contains 'owner@example.com'. To the right is a checked checkbox labeled 'Use system value'.

#### *General Contact*

- a. In the **Sender Name** field, type the name of the person to appear as the sender of any email messages that is associated with the General Contact identity.
  - b. In the **Sender Email** field, type the associated email address.
4. Repeat this process for each store email addresses that you plan to use.
  5. When complete, tap **Save Config**.

### Step 3: Update the Sales Email Configuration

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

1. In the panel on the left, under **Sales**, choose **Sales Emails**. The page has a separate section for each of the following:
  - Order and Order Comments
  - Invoice and Invoice Comments
  - Shipment and Shipment Comments
  - Credit Memo and Credit Memo Comments
2. Starting with **Order**, expand the section for each message, and make sure that the correct sender is selected.

The screenshot shows the 'Order' configuration panel with the following settings:

- Enabled**: Yes (Use system value checked)
- New Order Confirmation Email Sender**: Sales Representative (Use system value checked)
- New Order Confirmation Template**: New Order (Default) (Use system value checked)
- New Order Confirmation Template for Guest**: New Order for Guest (Default) (Use system value checked)
- Send Order Email Copy To**: (Empty text field, Comma-separated)
- Send Order Email Copy Method**: Bcc: (Use system value checked)

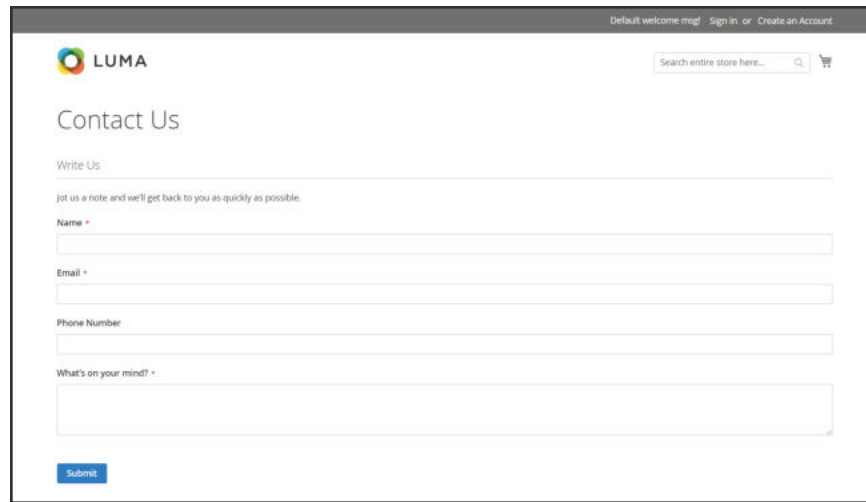
#### *Sales Email Order Configuration*

3. When complete, tap **Save Config**.

## Contact Us

The Contact Us link in the footer of the store is an easy way for customers to keep in touch with you. Customers can complete the form to send a message to your store. A standard Magento installation displays the default Contact Us form. After submitting the form, a thank you message appears

It is important to understand that the default Contact Us form is rendered directly from code rather than from a CMS page.

The screenshot shows the 'Contact Us' page for a store named 'LUMA'. At the top left is the LUMA logo. At the top right, there is a search bar with the placeholder text 'Search entire store here...' and a shopping cart icon. Below the logo, the page title 'Contact Us' is displayed. Underneath, there is a section titled 'Write Us' with a sub-header 'Write Us' and a message: 'Got us a note and we'll get back to you as quickly as possible.' The form contains four input fields: 'Name \*', 'Email \*', 'Phone Number', and 'What's on your mind? \*'. A blue 'Submit' button is located at the bottom left of the form area.

*Default Contact Us Page*

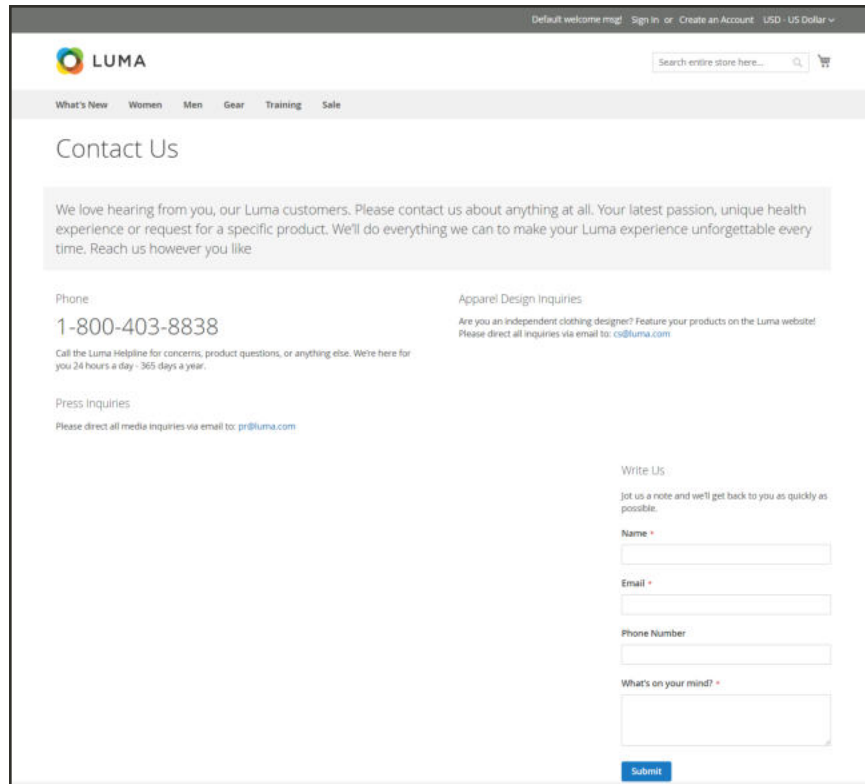
The store footer includes a link to the Contact Us page that is available throughout the store.



*Contact Us Link in Footer*

The Luma sample data includes additional information on the Contact Us page that shows how you might customize the page for your store.





Contact Us Page

### To configure Contact Us:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Contacts**.
3. Expand ☺ the **Contact Us** section. If necessary, set **Enable Contact Us** to “Yes.”

Contact Us

Enable Contact Us [store view] Yes Use system value

*Contact Us*

4. Expand ☺ the **Email Options** section. Then, do the following:

Email Options

Send Emails To [store view] hello@example.com Use system value

Email Sender [store view] Custom Email 2 Use system value

Email Template [store view] Contact Form (Default) Use system value

Email template chosen based on theme fallback when "Default" option is selected.

*Email Options*

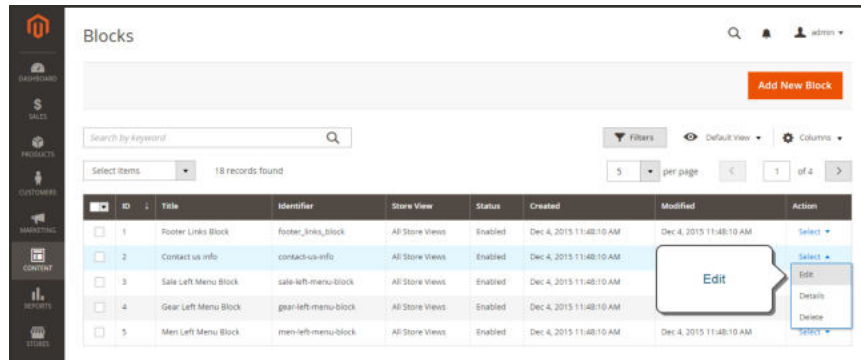
- a. In the **Send Emails to** field, enter the email address where messages from the Contact Us form are sent.
  - b. Set **Email Sender** to the store identity that appears as the sender of the message from the Contact Us form. For example: Custom Email 2.
  - c. Set **Email Template** to the template that is used for messages sent from the Contact Us form.
5. When complete, tap **Save Config.**

### To customize the content:

#### Method 1: Using Sample Data

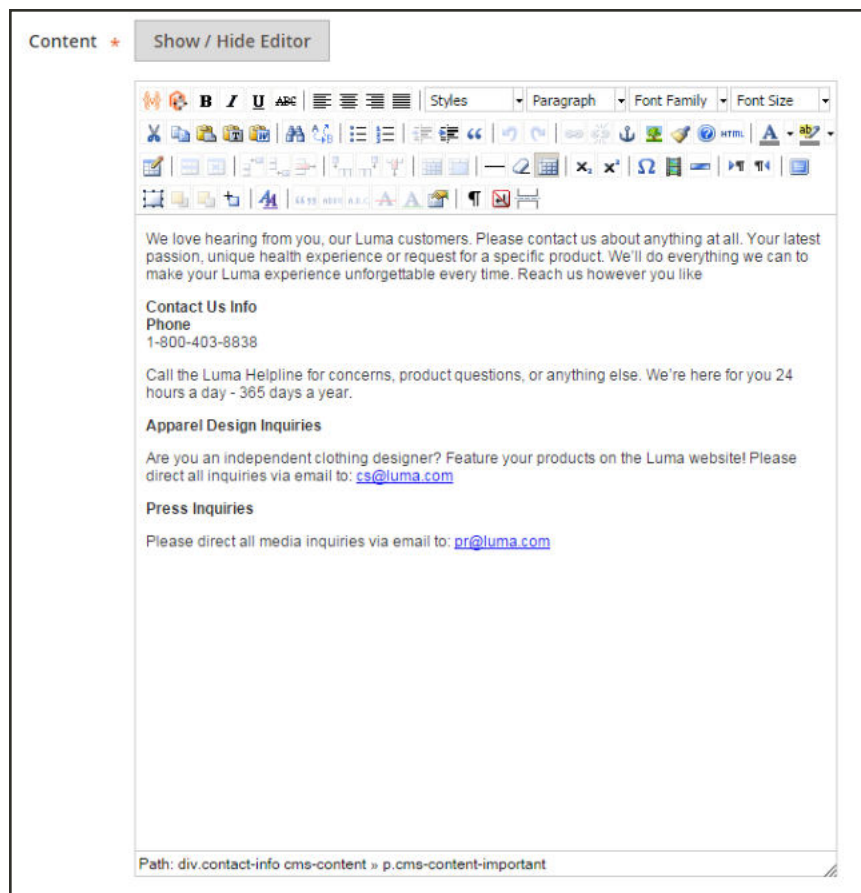
The Luma sample data includes a Contact Us Info block that can be customized for your store. The contact-us-info block can be easily modified to add your own content to the Contact Us page.

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. Find the **Contact Us Info** block in the list, and open in **Edit** mode.



Contact Us Info

3. Scroll down to the **Content** field, and make any changes necessary.
  - Use the editor **toolbar** to format the text, and add **images** and **links**.
  - Tap **Show / Hide Editor** to work directly with the HTML.



Contact Us Demo Content

4. When complete, tap **Save Block**.

## Method 2: Without Sample Data

1. To create a CMS page for the Contact Us form, do the following:
  - a. Follow the standard instructions to create a **new page**, with the following settings:

Page Title: Contact Us

Content Heading: Contact Us

- b. Under **Search Engine Optimization**, enter the following settings:

URL Key: contact

Meta Title: Contact Us

- c. Under **Design**, set **Layout** to “1 column.”

2. Under **Content**, do the following:

- a. Add any information that you want to include. The content that you enter will appear to the left of the form.
  - a. If you want to align your content with the top of the form, enclose it in a `<div>` tag that floats left as shown in the following example:

### Example

```
<div style="float: left; padding-right: 15px;">
<p>We'd love to hear from you!</p>

</div>
```

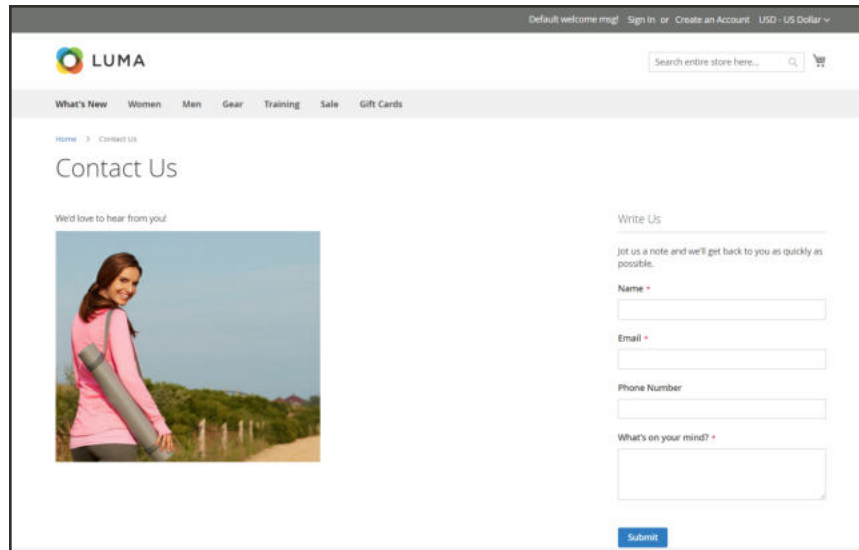
- b. Tap **Show / Hide Editor** to remove the toolbar. Then, paste the following code on a line below the content that you entered in the last step.

### “Contact Us”

```
{{block class="Magento\Contact\Block>ContactForm"
name="contactForm" template="Magento_Contact::form.phtml"}}
```

3. When complete, tap **Save Page**.

Your custom form now appears instead of the default form whenever the Contact Us link in the footer is clicked. Make sure to test your content on a mobile device to ensure that it renders correctly.



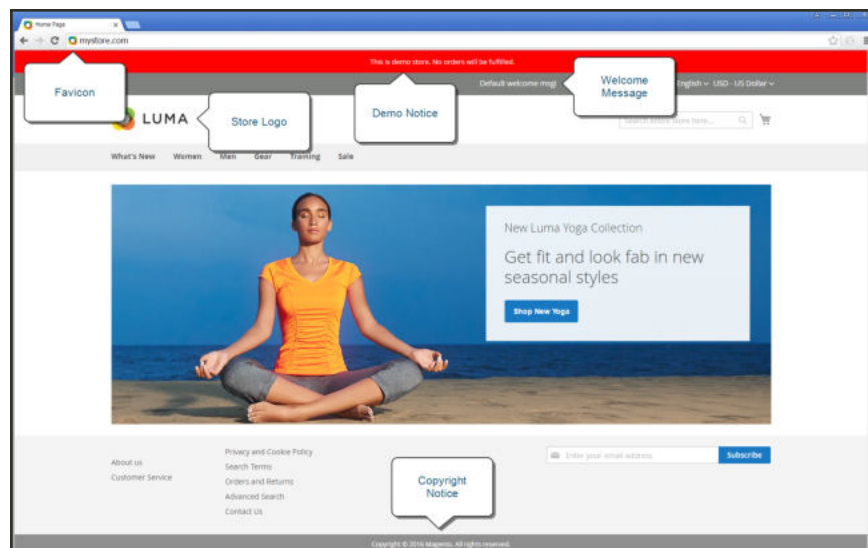
*Contact Us Custom Page*



## CHAPTER 7:

# Storefront Branding

One of the first things you'll want to do is to change the logo in the header, and upload a favicon for the browser. You'll also want to update the copyright notice in the footer,. These are a few simple design tasks that you can take care of right away. While your store is in development, you can turn on the store demo notice, and then remove it when you're ready to launch.



*Storefront Branding*

## Uploading Your Logo

The size and location of the logo in the header is determined by the store's theme. Your logo can be saved as either a GIF, PNG, or JPG (JPEG) file type, and uploaded from the Admin of your store.



*Logo in Header*

The logo image resides in the following location on the server. Any image file with the name “logo.gif” is used as the default theme logo.

**Full path:** `app/design/frontend/[vendor]/[theme]/web/images/logo.gif`

**Relative path:** `images/logo.gif`

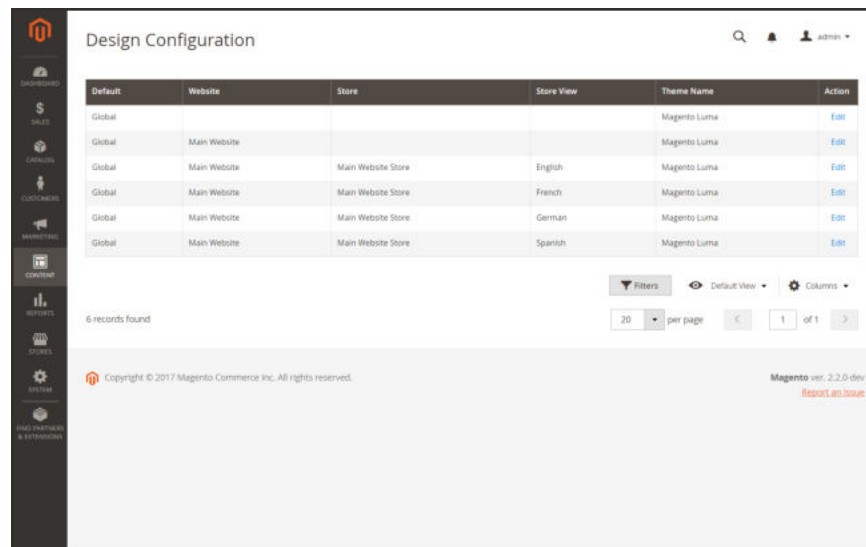
If you don't know the size of the logo, or any other image that is used in your theme, open the page in a browser, right-click the image, and inspect the element.

In addition to the logo in the header, your logo also appears on [email templates](#) and on [PDF invoices](#) and other sales documents. The logos used for email templates and invoices have different size requirements, and must be uploaded separately. To learn more, see: [Communications](#).




## To upload your logo:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.



*Design Configuration*

2. Find the store view that you want to configure, and in the **Action** column, click **Edit**.
3. Expand  the **Header** section. Then, do the following:

*Header*

- a. To upload a new logo, tap **Upload**. Then, choose the file from your computer.
  - b. Enter the **Logo Image Width** and **Logo Image Height**.
  - c. In the **Logo Image Alt** field, enter the text that you want to appear when someone hovers over the image.
4. When complete, tap **Save Configuration**.

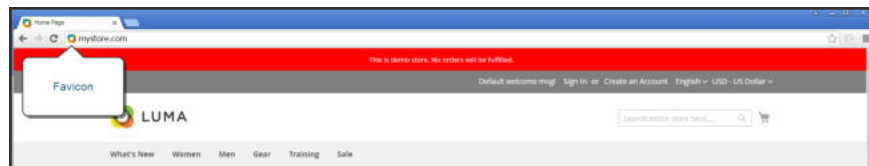
## Logo File Formats

FILE FORMAT	DESCRIPTION
PNG	(Portable Network Graphics) This newer alternative to the GIF format supports up to 16 million colors (24 bit). The lossless compression format produces a high-quality bitmap image with crisp text, but a larger file size than some formats. The PNG format supports transparent layers, and is designed to be both viewed and streamed online.
GIF	(Graphics Interchange Format) A widely supported, and older bitmap format that is limited to 256 (8 bit) colors. The GIF format supports simple animation and transparent layers.
JPG (JPEG)	(Joint Photographics Expert Group) A compressed bitmap format that is used by most digital cameras. The lossy compression causes some data loss, which is sometimes noticeable as blurry spots in text.

## Adding a Favicon

Favicon is short for “favorite icon,” and refers to the little icon on the tab of each browser page. Depending on the browser, the favicon also appears in address bar, just before the URL.

Favicons are generally 16 x 16 pixels or 32 x 32 pixels in size. Magento accepts ICO, PNG, APNG, GIF, and JPG (JPEG) file types, although not all browsers support these formats. The most widely-supported file format to use for a favicon is ICO. Other image file types can be used, although the format might not be supported by all browsers. There are many free tools available online that you can use to generate an ICO image or convert an existing image to the format.



*Favicon in Address Bar*


### Process Overview:

- Step 1: [Create a Favicon](#)
- Step 2: [Upload the Favicon to Your Store](#)
- Step 3: [Refresh the Cache](#)

### Step 1: Create a Favicon

1. Create a 16 x 16 or 32 x 32 graphic image of your logo, using the image editor of your choice.
2. (Optional) Use one of the available online tools to convert the file to the .ico format. Then, save the file to your computer.

### Step 2: Upload the Favicon to Your Store

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **HTML Head** section. Then, do the following:

HTML Head

Favicon Icon

Allowed file types: ico, png, gif, jpg, jpeg, apng. Not all browsers support all these formats!

Default Page Title: Magento Commerce

Page Title Prefix:

Page Title Suffix:

Default Meta Description:

Default Meta Keywords:

Scripts and Style Sheets: `<link rel="stylesheet" type="text/css" media="all" href="{{MEDIA_URL}}styles.css" />`

This will be included before head closing tag in page HTML.

Display Demo Store Notice:

### HTML Head

- a. Tap **Upload**. Then, navigate to the favicon file that you prepared, and tap **Open**.

Favicon Icon

Allowed file types: ico, png, gif, jpg, jpeg, apng. Not all browsers support all these formats!

favicon.ico  
64x64, 31 KB

### Favicon

- b. If you want to delete the current favicon, tap **Delete** ( ) in the lower-left corner of the image. Then, upload another.
4. When complete, tap **Save Configuration**.

### Step 3: Refresh the Cache

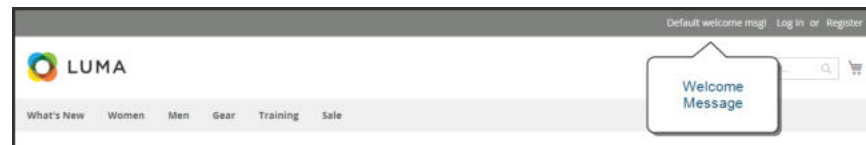
1. When prompted to refresh the cache, click the **Cache Management** link in the message at the top of the workspace.
2. In the list, mark the **Page Cache** checkbox that is marked “Invalidated.”
3. Set **Actions** to “Refresh.” Then, tap **Submit**.
4. To view the new favicon, return to your storefront and press **F5** to refresh the browser.

## Favicon File Formats

FILE FORMAT	DESCRIPTION
PNG	(Portable Network Graphics) This newer alternative to the GIF format supports up to 16 million colors (24 bit). The lossless compression format produces a high-quality bitmap image with crisp text, but a larger file size than some formats. The PNG format supports transparent layers, and is designed to be both viewed and streamed online.
APNG	(Animated Portable Network Graphics) A file format similar to PNG that supports simple animation.
GIF	(Graphics Interchange Format) A widely-supported, and older bitmap format that is limited to 256 (8 bit) colors. The GIF format supports simple animation and transparent layers.
JPG (JPEG)	(Joint Photographics Expert Group) A compressed bitmap format that is used by most digital cameras. The lossy compression causes some data loss, which is sometimes noticeable as blurry spots in text.

## Welcome Message

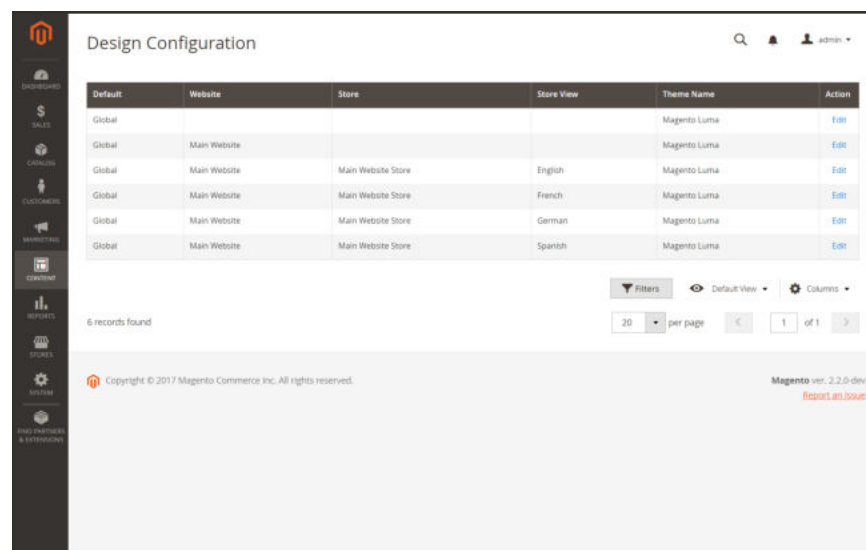
The Welcome message in the header expands to include the name of the customer who is logged in. Before you launch your store, be sure to change the default Welcome text for each [store view](#).




*Welcome Message*

### To change the welcome message:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**. Then, do the following:



*Design Configuration*

- a. Under **Other Settings**, expand  the **Header** section.
- b. Enter the **Welcome Text** that you want to appear in the header of your store.

*Header*

3. When complete, tap **Save Configuration**.
4. When prompted to update the Page Cache, click the **Cache Management** link at the top of the workspace. Then, follow the instructions to refresh the cache.

## Copyright Notice

Your store has a copyright notice in the footer of each page. As a best practice, the copyright notice should include the current year, and identify your company as the legal owner of the content on the site.

*Copyright Notice*

The `&Copy;` character code is used to insert the copyright symbol, as shown in the following examples:

### Long Format Example

Copyright &Copy; 2013-2017 Magento, Inc. All rights reserved.

### Short Format Example

&Copy; 2017 Magento, Inc. All rights reserved.

## To change the copyright notice:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**, and do the following:

Default	Website	Store	Store View	Theme Name	Action
Global				Magento Luma	<a href="#">Edit</a>
Global	Main Website			Magento Luma	<a href="#">Edit</a>
Global	Main Website	Main Website Store	English	Magento Luma	<a href="#">Edit</a>
Global	Main Website	Main Website Store	French	Magento Luma	<a href="#">Edit</a>
Global	Main Website	Main Website Store	German	Magento Luma	<a href="#">Edit</a>
Global	Main Website	Main Website Store	Spanish	Magento Luma	<a href="#">Edit</a>

*Design Configuration*

- a. Under **Other Settings**, expand  the **Footer** section.

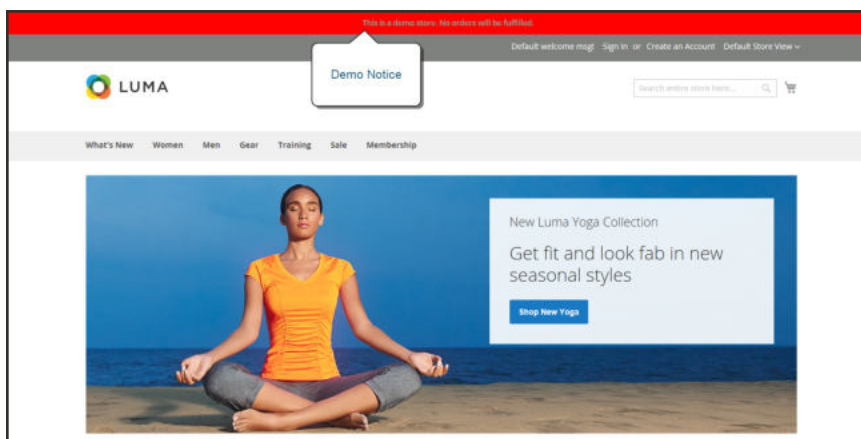
*Footer*

- b. In the **Copyright** box, enter the copyright notice that you want to appear in the footer of each page. Use the `&Copy;` character code to insert a copyright symbol.
3. When complete, tap **Save Configuration**.




## Store Demo Notice

If your store is online, but still under construction, you can display a store demo notice at the top of the page to let people know that the store is not yet open for business. When you are ready to “go live,” simply remove the message. It’s like flipping the sign hanging in the window from “Closed” to “Open.” The format of the demo notice is determined by the theme of your store.



*Store Demo Notice*

### To set the store demo notice:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **HTML Head** section.
4. Scroll down to the bottom, and set the **Display Demo Store Notice** to your preference.

HTML Head

Favicon Icon   
Allowed file types: ico, png, gif, jpeg, jpeg, jpeg, png. Not all browsers support all these formats.

Default Page Title

Page Title Prefix

Page Title Suffix

Default Meta Description

Default Meta Keywords

Scripts and Style Sheets   
This will be included before head closing tag in page HTML.

Display Demo Store Notice

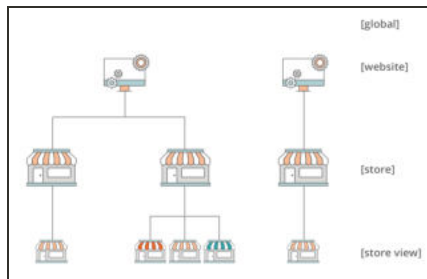
*HTML Head*

5. When complete, tap **Save Configuration**.

## CHAPTER 8:

# Websites, Stores & Views

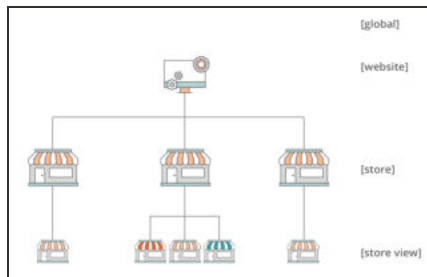
Every Magento installation has a **hierarchy** of website(s), store(s), and store view(s). The term “scope” determines where in the hierarchy a database entity — such as a product, attribute, or category — content element, or configuration setting applies. Websites, stores, and store views have one-to-many parent/child relationships. A single installation can have multiple websites, and each website can have multiple stores and store views.



## Websites

---

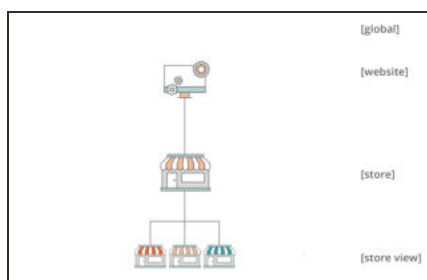
Magento installations begin with a single website which by default, is called “Main Website.” You can also set up multiple websites for a single installation, each with its own IP address and domain.



## Stores

---

A single website can have multiple stores, each with its own main menu. The stores share the same product catalog, but can have a different selection of products and design. All stores under the same website share the same Admin and checkout.



## Store Views

---

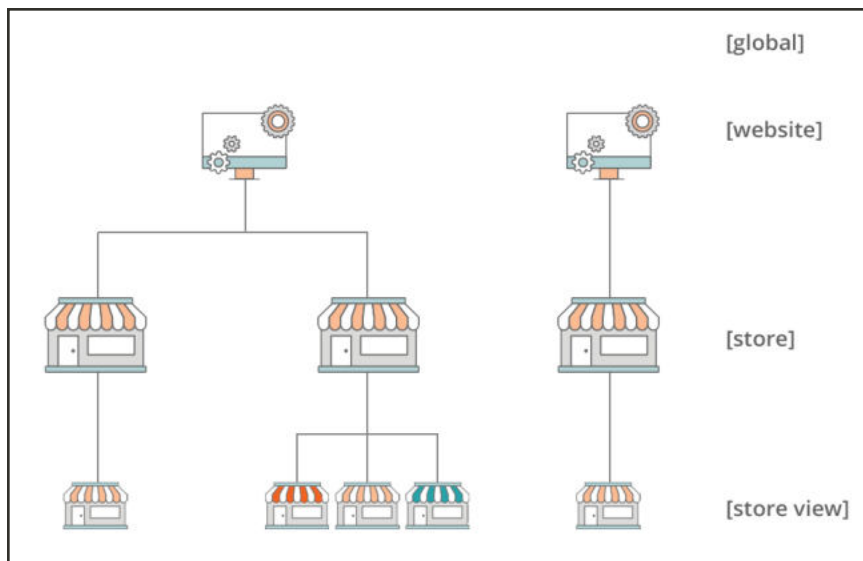
Each store that is available to customers is presented according to a specific “view”. Initially, a store has a single default view. Additional store views can be added to support different languages, or for other purposes. Customers can use the language chooser in the header to change the store view.

## Scope

If your Magento installation has a hierarchy of websites, stores, or views, you can set the context, or “scope” of a configuration setting to apply to a specific part of the installation. The context of many database entities can also be assigned a specific scope to determine how it is used in the store hierarchy. To learn more, see: [Product Scope](#) and [Price Scope](#).

Some configuration settings such as postal code, have a [global] scope because the same value is used throughout the system. The [website] scope applies to any stores below that level in the hierarchy, including all stores and their views. Any item with the scope of [store view] can be set differently for each store view, which is typically used to support multiple languages.

Unless the store is running in [Single Store Mode](#), the scope of each configuration setting appears in small text below the field label. If your installation includes multiple websites, stores or views, you should always choose the [Store View](#) where the settings apply before making any changes.



*Hierarchy of Websites, Stores, and Store Views*

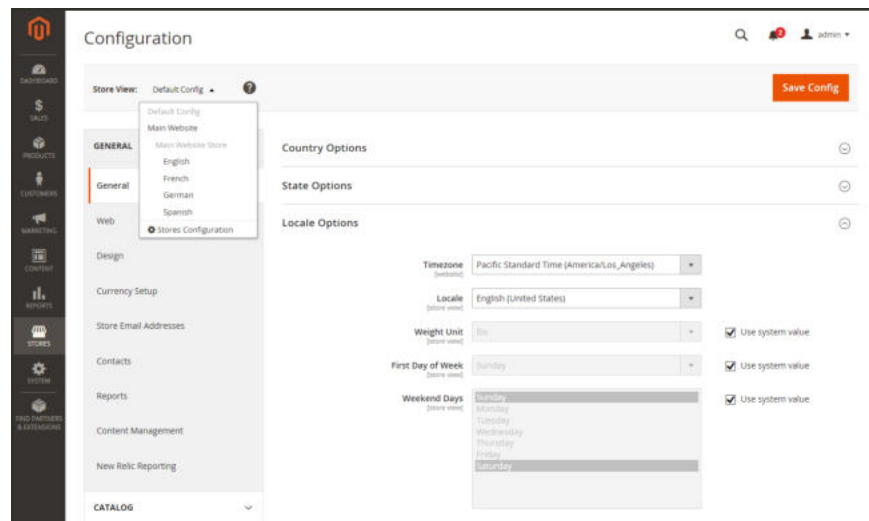
### Scope Settings

SCOPE	DESCRIPTION
Global	System-wide settings and resources that are available throughout the Magento installation.
Website	Settings and resources that are limited to the current website. Each website has a default store.
Store	Settings and resources that are limited to the current store. Each store has a default root category (main menu) and default store view.
Store View	Setting and resources that are limited to the current store view.

## Changing Scope

The Store View chooser in the upper-left corner of many Admin pages filters the view of the page for a specific scope, and also sets the value of some entities that are used by Magento. It lists each level in the hierarchy by name, and is used to change the scope to another level. Any settings that represent the current scope are grayed out, so only those that represent the current scope setting are available. The scope is initially set to “Default Config.” For Admin users with restricted access, the list of available store views includes only those to which the user has **permission** to access.

The checkbox to the right of many configuration settings can be used to either apply or override the default setting, according to the current scope. The field value cannot be changed when the checkbox is marked. To change the current value, first clear the checkbox, and then enter the new value. You are prompted to confirm whenever you change scope. The checkbox label changes according to the current scope, and always refers to the parent level which is one step up in the hierarchy. Because the parent level is a container for all the items below that level, the value from the parent level is inherited, unless it is overridden.



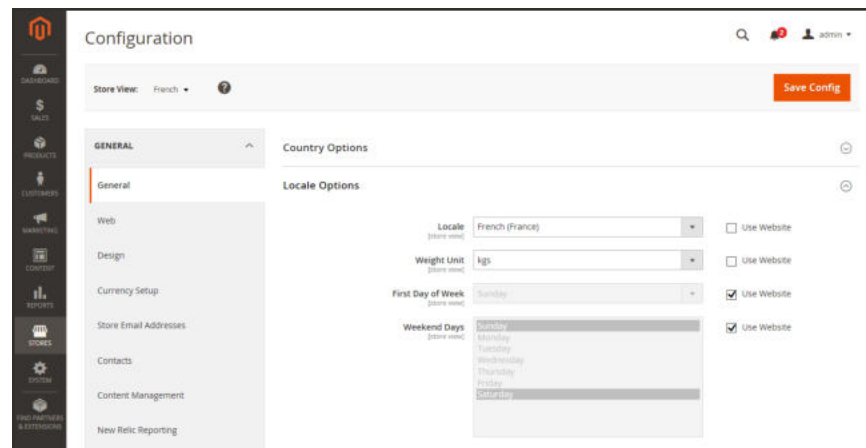
*Default Config with "Use System Value" Checkboxes*

### To set the configuration scope:

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

1. On the Admin sidebar, do one of the following:
  - For most configuration settings, tap **Stores**. Then under **Settings**, choose **Configuration**.
  - For **design-related settings**, tap **Content**. Under **Design**, choose **Configuration**. Then in the grid, choose the applicable store view.
2. Navigate to the configuration setting to be changed. Then, do the following:

- a. In the upper-left corner, set **Store View** to the specific view where the configuration applies. When prompted to confirm scope switching, tap **OK**.  
A checkbox appears after each field, and additional fields might become available.
  - b. Clear the **Use system value** checkbox after any field that you want to edit. Then, update the value for the view.
  - c. Repeat this process for every field that needs to be updated on the page.
3. When complete, tap **Save Config**.



*Setting the Locale of the French Store View*

## Store Hierarchy

LEVEL	DESCRIPTION
Default Config	The default system configuration.
Main Website	The name of the website at the top of the hierarchy.
Main Website Store	The name of the default store that is associated with the parent website.
Default Store View	The name of the default store view that is associated with the parent store.
Stores Configuration	Jumps to the Stores grid, and is the same as choosing Stores > All Stores from the Admin sidebar.

## Default Value Options

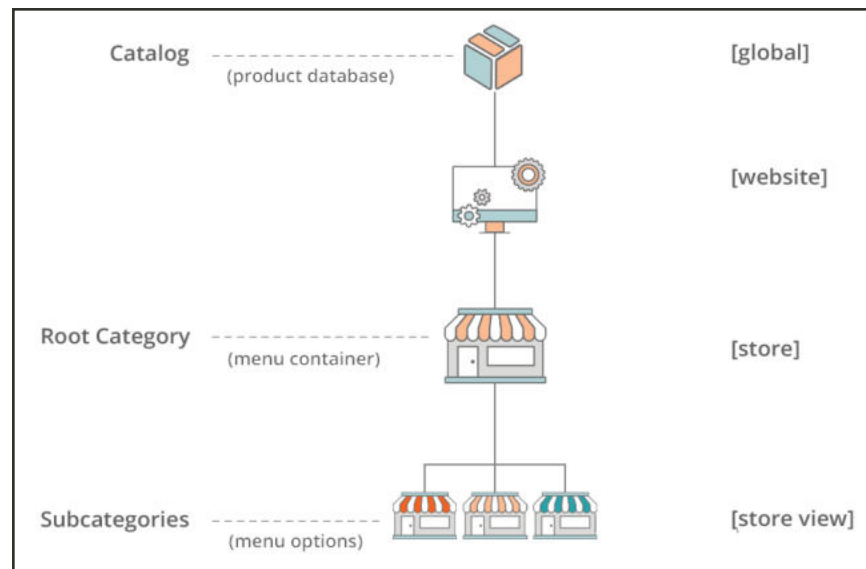
CHECKBOX	DESCRIPTION
Use system value	The “Use system value” checkbox appears when the configuration scope is set to “Default Config.”
Use Default	The “Use Default” checkbox appears when the configuration scope is set to “Main Website,” and refers to the default store that is assigned to the website.
Use Website	The “Use Website” checkbox appears when the configuration scope is set to a specific store view. When marked, it uses the setting from the parent website that is associated with the store view. In this case, the store level is skipped because it is understood to apply to the default store that is associated with the website.

## Catalog Scope

Magento uses the term “catalog” to refer to the product database as a whole. Access to catalog data is determined by several factors, including the **scope** setting, the catalog configuration, and the **root category** that is assigned to the store. The catalog includes products that are enabled and available for sale, as well as those that are currently not offered for sale.

In sales, the term “catalog” usually refers to a curated selection of products that is available for sale. For example, a store might have a “Spring Catalog” and a “Fall Catalog”.

Like the table of contents of a printed catalog, the main menu of your store — or “top navigation” — organizes products by category to make it easy for customers to find what they want. The main menu is based on a “root category,” which is a container for the menu that is assigned to the store. Because the specific menu options are defined at the store view level, each view can have a different main menu based on the same root category. Within each menu, you can offer a curated selection of products that is suitable for the store.

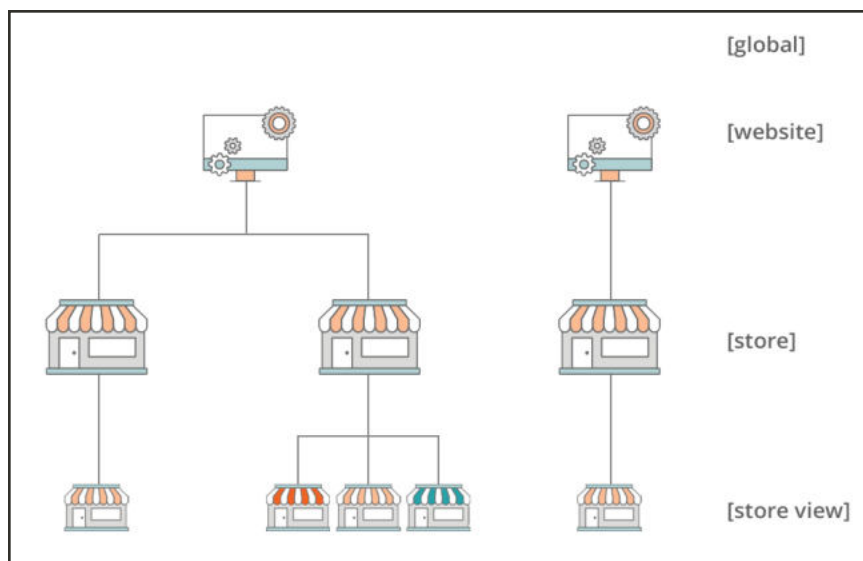


*Product Catalog in Store Hierarchy*



## Product Scope

For installations with multiple websites, stores, and views, the **scope** setting determines where products are available for sale, and the product information that is available for each store view. Initially, all products that you create are published to the default website, store, and store view.



*Multisite Installation*

If you have only a single store with the default view, you can run your store in **Single Store Mode** to hide the scope settings. However, if your store has multiple views, a scope indicator appears below the name of each field.

- To edit product information for a specific view, use the Store View control in the upper-left corner to choose the view. Additional controls become available for any field that can be edited at the store view level.
- To define the scope of a product in a multisite installation, see the **Product in Websites** section of product information.

The process of editing a product for a store view is like adding a layer of product information that is specific to the view.

You can only edit or assign products for the site you have permissions for, not for all sites where the product is assigned.

Although the Spanish store view is selected in the following example, the product information still appears in the original language of the default store view. To translate the product information, you must switch to the Spanish view, and translate the text fields — such as product title, description, and the meta data. To learn more, see: **Translating Products**.

### To edit a product for a different view:

1. In the upper-left corner, set **Store View** to the specific view to be edited. When prompted to confirm, tap **OK** to switch scope.



*Store View*

2. A checkbox appears below any field that can be edited for the store view. To override the default value, clear the **Use Default Value** checkbox. Then, update the field with the new value for the store view.



*Translating Product Name for Spanish Store View*

3. When complete, tap **Save**.
4. In the upper-left corner, set the **Store View** chooser back to the default.
5. To verify the change in your store, do the following:
  - a. In the upper-right corner, tap the **Admin** menu arrow. Then, choose **Customer View**.



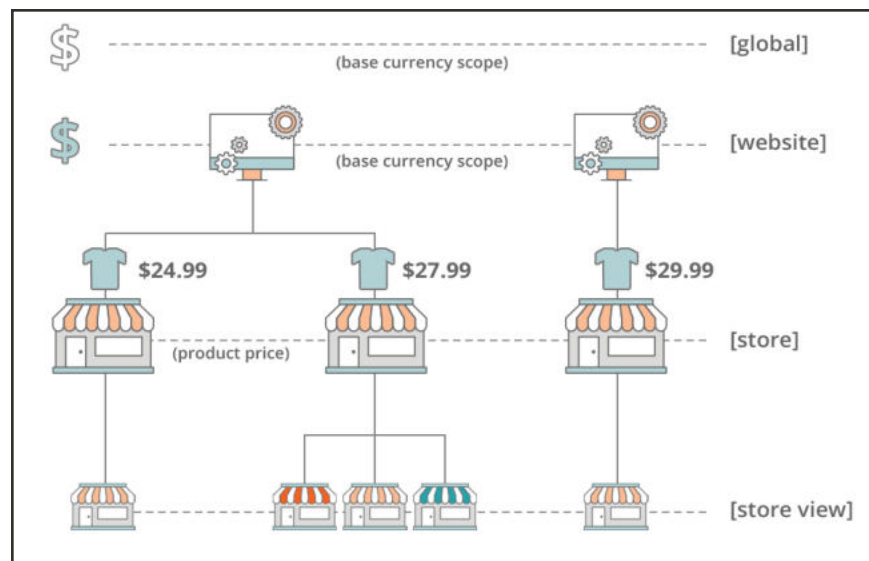
*Customer View*

- b. In the upper-right corner of the store, set the **Language Chooser** to the store view of the product that you edited. Then, find the product that you edited for the view.

## Price Scope

The scope of the **base currency** that is used for product prices can be configured to apply at either the global or website level. If applied at the global level, the same price is used throughout the store hierarchy. If the price configuration is set to the website level, the same product can be available at different prices in different stores. By default, the scope of product pricing is global.

Different factors can affect the price of the same product in one location and not another. For example, there might be additional costs to bring the product to market, and other considerations that impact the price of products sold in a specific store. The following illustration shows a multisite installation with the base currency set to the website level. In each store, the same product has a different price.



*Price Scope*

**To configure price scope:**

1. On the Admin menu, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Scroll down to the **Price** section. Then, set **Catalog Price Scope** to one of the following:
  - Global
  - Website

The scope setting that you choose appears below price fields in your catalog.




*Catalog Price Scope*

4. When complete, tap **Save Config**.

## Customer Account Scope

The scope of customer accounts can be limited to the website where the account was created, or shared with all websites and stores in the [store hierarchy](#).

### To set the scope of customer accounts:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand  the **Account Sharing Options** section.



### *Account Sharing Options*

4. If necessary, clear the **User system value** checkbox. Then, set **Share Customer Accounts** to one of the following:

Global	Shares customer account information with every website and store in the Magento installation.
Per Website	Limits customer account information to the website where the account was created.
5. When complete, tap **Save Config**.

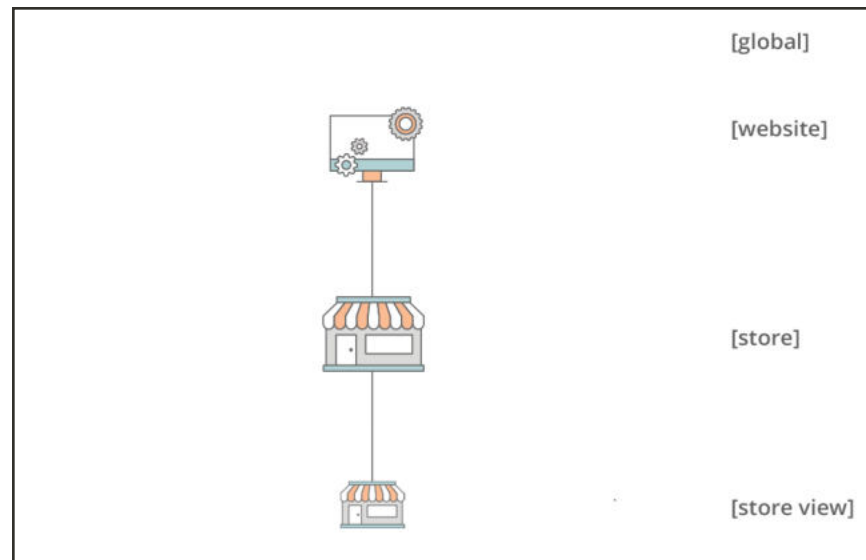
## Scope Quick Reference

SCOPE	DESCRIPTION
<b>GLOBAL</b>	
Admin	All websites, stores, and store views in the installation are managed from the same <b>Admin</b> .
Default Config	The global <b>default configuration</b> settings are used through the store hierarchy, unless they are overridden at a lower level.
Catalog	The term “catalog” refers to the product database as a whole, and is available throughout the installation.
Product Prices	<b>Product prices</b> can be configured to be applied at either a global or website level.
Product Configurations	Attributes that are used as <b>configurable product</b> options must have a global scope.
Customers	Customer accounts can be configured to be applied at a global or website level. Each website can have a separate set of <b>customer accounts</b> , or share the same customer accounts with other websites in the installation.
<b>WEBSITE</b>	
Domain	Additional <b>websites</b> can be set up as subdomains of the primary domain, or have separate IP addresses and dedicated domains.
Customers	Customer accounts can be configured to be applied at a global or website level. Each website can have a separate set of <b>customer accounts</b> , or share the same customer accounts with other websites in the installation.
Currency	Each website can be assigned a different <b>base currency</b> . The base currency is used to process all transactions, although a different display currency might appear to the customer, according to the locale of the store view.
Products	Individual products are assigned to the hierarchy at the website level. The Products grid lists all products in the catalog, and the websites where they are available. The <b>Product in Websites</b> setting identifies each website where the product is available.

SCOPE	DESCRIPTION
Product Prices	<b>Product prices</b> can be configured to be applied at either a global or website level.
Payment Methods	<b>Payment methods</b> are configured at the website level, although the title and instructions can be configured for each store view.
Checkout	The <b>checkout process</b> takes place at the website level, although some display options can be configured for each store view. All stores associated with a website have the same <b>checkout configuration</b> .
<b>STORE</b>	
Root Category	Each store can have a separate set of products and main menu that is based on a “root” category and subcategories. Each catalog has a <b>root category</b> that is assigned at the store level.
<b>STORE VIEW</b>	
Subcategories	The <b>subcategories</b> that make up the main menu (under the root) are assigned at the store view level.
Locale	Each store view can be assigned a different <b>locale</b> . The display currency, units of measurement, and most of the Admin interface are specific to the locale.
Languages	To support multiple languages, all content, including product descriptions, must be <b>translated</b> for each store view.
Display Currency	A different <b>display currency</b> can be used for each store view, although the transactions are processed at the website level using the base currency.

## Single Store Mode

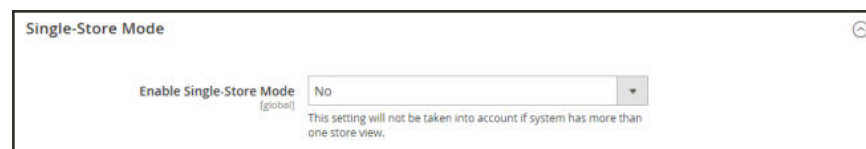
If your Magento installation has only a single store and store view, you can simplify the display by turning off all store view options and scope indicators. Most of the screenshots in this guide were taken with Single Store Mode disabled to show the scope indicator for each setting. Single Store Mode is overridden if you [add more store views](#) later.



*Single Website, Store, and View*

### To set single store mode:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Under **General**, scroll down to the bottom of the page, and expand the **Single-Store Mode** section.
3. Set **Enable Single-Store Mode** to “Yes.”



*Single Store Mode*

4. Tap **Save Config**.



5. When prompted to refresh the cache, do the following:
  - a. Tap the **Cache Management** link in the system message at the top of the page.



*System Message*

- b. Mark the **Page Cache** checkbox.
- c. With **Actions** set to “Refresh,” tap **Submit**.





## CHAPTER 9:

# Industry Compliance

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

- Legal Requirements
- Industry Guidelines
- Best Practices

In this chapter, you will learn about **PCI compliance**, and the importance of establishing procedures to protect payment information. You will also learn how to bring your store into compliance with **Global Data Protection Regulations** and the **cookie law**, which is required in some countries and considered to be a best practice in others. In addition, you will learn how to customize and maintain a **privacy policy** for your store.

## PCI Compliance Guidelines

The Payment Card Industry (PCI) has established a set of requirements for businesses that accept payment by credit card over the Internet. In addition to maintaining a secure server environment, merchants who handle customer credit card information must meet the following guidelines:

### PCI Requirements

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

To learn more, see: [Magento Approach to PCI Compliance](#).

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

## GDPR Compliance

The General Data Protection Regulation (GDPR) is legislation that regulates data protection and privacy for all individuals in the European Union and the European Economic Area. The legislation also applies to the export of personal data outside the EU. The GDPR was adopted in April 2016, and became enforceable on 25 May, 2018. Business that are not based in the EU, but engage in global commerce are required to comply with the regulation.

All organizations that process personal data must disclose the following:

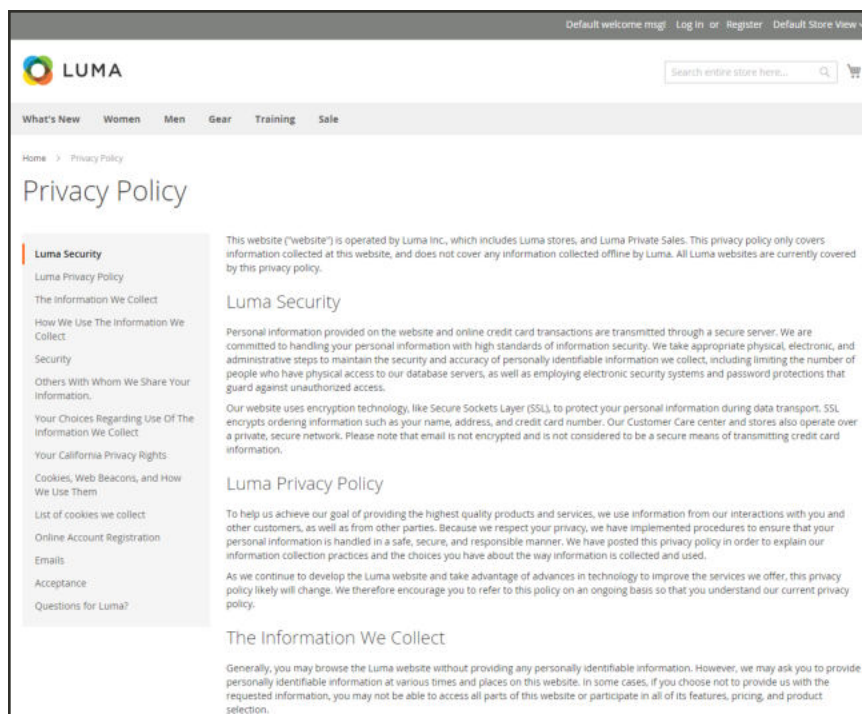
- The type of data that is collected
- The purpose for collecting the data
- The method that is used to collect the data
- How long the data is retained
- Whether or not the data is shared with others

### Best Practices

- Examine the current [privacy policies](#) for all of your Magento stores to ensure that they align with GDPR requirements. .
- Update your [Google](#) settings to ensure that its use of personal data follows GDPR requirements.
- Maintain transparency, and keep thorough documentation.
- Visit the [Magento website](#) to learn how Magento helps merchants prepare for GDPR compliance.
- For developers in need of technical information, including data flow diagrams and mapping, see: [Magento 2.3 GDPR compliance](#).

## Privacy Policy

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

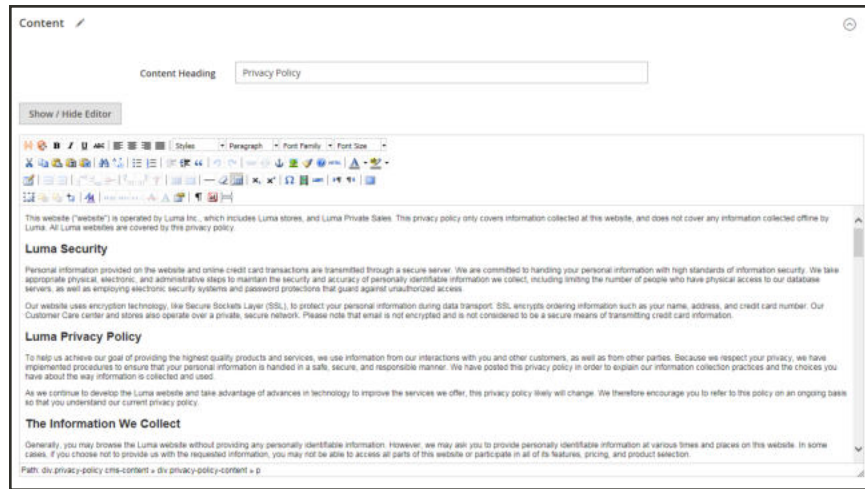


### *Privacy Policy*

#### To edit your privacy policy:

The Luma sample data includes a sample privacy policy that you can modify for your use..

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. In the grid, find **Privacy Policy**. Then in the **Action** column, set **Select to Edit**.
3. Expand the **Content** section, and make the necessary changes to the content. To learn more, see: [Using the Editor](#).



Content

If you change the URL key of the privacy policy page, you must also create a **custom URL rewrite** to redirect traffic to the new URL key. Otherwise, the link in the footer will return “404 Page Not Found.”

4. When complete, tap **Save Page**.

## Cookie Law Compliance

Cookies are small files that are saved to the computer of each visitor to your site, and used as temporary holding places for information. Information that is saved in cookies is used to personalize the shopping experience, link visitors to their shopping carts, measure traffic patterns, and improve the effectiveness of promotions. To keep pace with legislation in many countries regarding the use of cookies, Magento offers merchants a choice of methods to obtain customer consent.

If you have modified the default [Google settings](#) to comply with the [General Data Protection Regulation](#), it is no longer necessary to obtain user consent for the use of Google Analytics cookies.

### Method 1: Implied Consent

Implied consent means that visitors to your store have a clear understanding that cookies are a necessary part of operations, and by using your site, have indirectly granted permission to use them. The key to gaining implied consent is to provide enough information for a visitor to make an informed decision. Many stores display a message at the top of all standard pages that provides a brief overview of how cookies are used, with a link to the store's privacy policy. The privacy policy should describe the type of information that your store collects, and how it is used.

### Method 2: Expressed Consent

Operating your store in [cookie restriction mode](#) requires visitors to express their consent before any cookies can be saved to their computers. Unless consent is granted, many features of your store will be unavailable. For example, if Google Analytics is available for your store, it can be invoked only after the visitor has granted permission to use cookies.

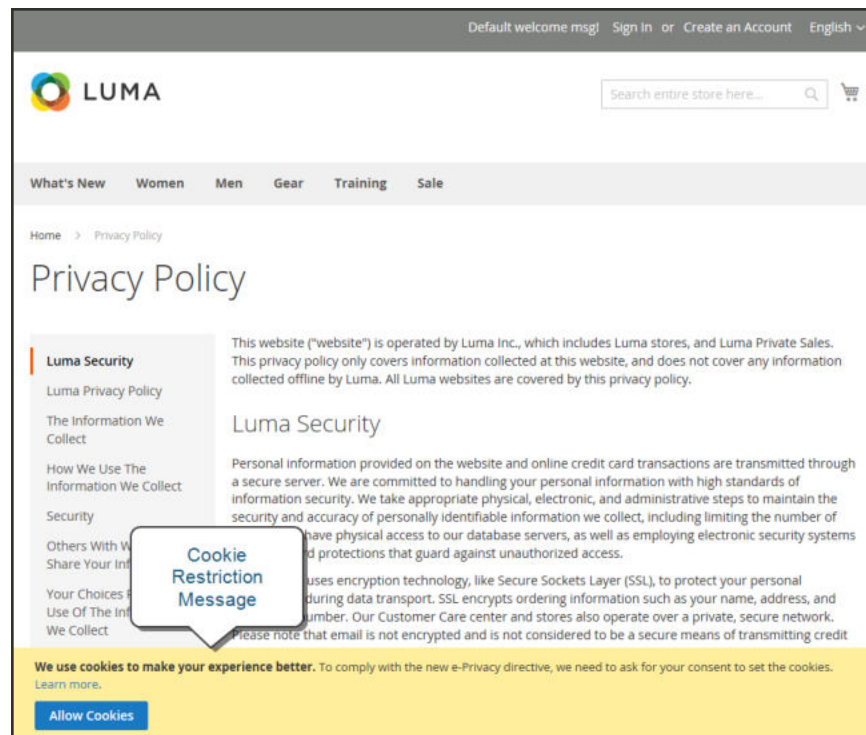


## Cookie Restriction Mode

When Cookie Restriction Mode is enabled, visitors to your store are notified that cookies are required for full-featured operations. Depending on your theme, the message might appear above the header, below the footer, or somewhere else on the page. The message links to your privacy policy for more information, and encourages visitors to click the Allow button to grant consent. After consent is granted, the message disappears.

Your [privacy policy](#) should include the name of your store and contact information, and explain the purpose of each cookie that is used by your store. To learn more, see: [Cookie Reference](#).

If you change the URL key of the privacy policy, you must also create a custom URL rewrite to redirect traffic to the new URL key. Otherwise, the link in the Cookie Restriction Mode message will return “404 Page Not Found.”



*Cookie Restriction Notice In Footer*

## Step 1: Enable Cookie Restriction Mode

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**. Expand the **Default Cookie Settings** section, and do the following:



The screenshot shows the 'Default Cookie Settings' configuration panel. It contains the following fields and options:

- Cookie Lifetime**: Input field with value '3600' and a checkbox for 'Use system value'.
- Cookie Path**: Input field.
- Cookie Domain**: Input field.
- Use HTTP Only**: Dropdown menu with 'Yes' selected. Below it is a red warning: 'Warning: Do not set to "No". User security could be compromised.'
- Cookie Restriction Mode**: Dropdown menu with 'No' selected and a checkbox for 'Use system value'.

*Default Cookie Settings*

- a. Enter the **Cookie Lifetime** in seconds.
  - b. If you want to make cookies available to other folders, enter the **Cookie Path**. To make the cookies available anywhere in the site, enter a forward slash.
  - c. To make the cookies available to a subdomain, enter the subdomain name in the **Cookie Domain** field. (subdomain.yourdomain.com) To make cookies available to all subdomains, enter the domain name preceded by a period. (.yourdomain.com)
  - d. To prevent scripting languages such as JavaScript from gaining access to cookies, make sure that **Use HTTP Only** is set to "Yes."
  - e. Set **Cookie Restriction Mode** to "Yes."
- If necessary, clear the checkbox, and tap **OK** to confirm scope switching.
3. When complete, tap **Save Config**.
  4. When prompted to update the cache, click the **Cache Management** link in the system message. Then, refresh each invalid cache.

## Step 2: Update Your Privacy Policy

Update your **privacy policy** as needed to describe the information that your company collects, and how it is used.

## Cookie Reference

The default Magento cookies are classified as Exempt / Non-Exempt to help merchants meet **GDPR** requirements. Merchants should use this information as a guide, and consult with legal advisors to update their Privacy and Cookie Policies as part of a comprehensive GDPR compliance strategy.

### Magento 2.x Default Cookies

The following cookies are used by Magento Commerce “out of the box” for on-premise and cloud installations. These cookies may be required by functionality that is explicitly requested by the customer. To learn about the lifetime of session cookies, see: [Customer Session Lifetime](#).

Some of these cookies may provide configuration options, including enable/disable, as needed.

#### Requested Functionality Cookies (Exempt)

##### **guest-view**

Stores the Order ID that guest shoppers use to retrieve their order status. Guest orders view. Used in "Orders and Returns" widgets.

- Is Secure? No
- HTTP Only: Yes
- Expiration Policy: Session
- Module: Magento\_Sales

##### **login\_redirect**

Preserves the destination page the customer was navigating to before being directed to log in. Used in mini cart for logged in customers if Stores > Settings > Configuration > Sales > Checkout > Shopping Cart Sidebar > [Display Shopping Cart Sidebar](#) is set to "Yes".

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer

##### **mage-messages**

Tracks error messages and other notifications that are shown to the user, such as the cookie consent message, and various error messages. The message is deleted from the cookie after it is shown to the shopper.

There is not an option to disable this cookie.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Duration 1 year. Cleared on frontend when the message is displayed to the user.
- Module: Magento\_Theme

#### **mage-translation-storage(local storage)**

Stores translated content when requested by the shopper. Used when **Translation Strategy** is configured as "Dictionary (Translation on Storefront side)".

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Translation

#### **mage-translation-file-version (local storage)**

Tracks the version of translations in local storage. Used when **Translation Strategy** is configured as "Dictionary (Translation on Storefront side)".

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Translation

#### **product\_data\_storage (local storage)**

Stores configuration for product data related to Recently Viewed / Compared Products.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: Magento\_Catalog

#### **recently\_compared\_product (local storage)**

Stores product IDs of recently compared products.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules

- Module: `Magento_Catalog`

#### **recently\_compared\_product\_previous (local storage)**

Stores product IDs of previously compared products for easy navigation.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: `Magento_Catalog`

#### **recently\_viewed\_product (local storage)**

Stores product IDs of recently viewed products for easy navigation.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: `Magento_Catalog`

#### **recently\_viewed\_product\_previous (local storage)**

Stores product IDs of recently previously viewed products for easy navigation.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage rules
- Module: `Magento_Catalog`

#### **stf**

Records the time messages are sent by the SendFriend (**Email a Friend**) module.

- Is Secure? Yes
- HTTP Only: Yes
- Expiration Policy: Session
- Module: `Magento_SendFriend`

#### **X-Magento-Vary**

Configuration setting that improves performance when using Varnish static content caching.

- Is Secure? Yes
- HTTP Only: Yes
- Expiration Policy: Based on PHP setting `session.cookie_lifetime`
- Module: `Magento_PageCache`

## Persistent Customization Session Cookies (Exempt)

### amz\_auth\_err

Used if "Enable Login with Amazon" is enabled. Value "1" indicates an authorization error.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: 1 year
- Module: Amazon Pay

### amz\_auth\_logout

Used if "Enable Login with Amazon" is enabled. Value "1" indicates that the user should be logged out.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: 86400s (24h)
- Module: Amazon Pay

### form\_key

A security measure that appends a random string to all form submissions to protect the data from Cross-Site Request Forgery (CSRF).

- Is Secure? No
- HTTP Only: No
- Expiration Policy:
  - PHP: Based on PHP setting session.cookie\_lifetime
  - JS: Session
- Module: Page Cache

### mage-cache-sessid

The value of this cookie triggers the cleanup of local cache storage. When the cookie is removed by the backend application, the Admin cleans up local storage, and sets the cookie value to "true."

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer

**mage-cache-storage**

Local storage of visitor-specific content that enables ecommerce functions.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer, Magento\_Persistent

**mage-cache-storage (local storage)**

Local storage of visitor-specific content that enables ecommerce functions.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer, Magento\_Persistent, Magento\_NegotiableQuote

**mage-cache-storage-section-invalidation (local storage)**

Forces local storage of specific content sections that should be invalidated.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Per local storage
- Module: Magento\_Customer

**persistent\_shopping\_cart**

Stores the key (ID) of persistent cart to make it possible to restore the cart for an anonymous shopper.

- Is Secure? Yes
- HTTP Only: Yes
- Expiration Policy: Based on configuration [Persistent Shopping Cart](#) > General Options > Persistence Lifetime (seconds)
- Module: Magento\_Persistent

**private\_content\_version**

Appends a random, unique number and time to pages with customer content to prevent them from being cached on the server.



It is set in multiple places: in PHP, in JavaScript as a cookie, and in JavaScript to local storage.

For the HTTP Only Yes (based on request) means that the cookie Secure if set during HTTPS request, and unsecure if set during HTTP request.

- Is Secure? Yes (based on request), No
- HTTP Only:
  - PHP: 1 year / 315360000s (10yr)
  - JS: 1 day
  - JS local storage: Per local storage rules (forever)
- Expiration Policy: Based on configuration [Persistent Shopping Cart](#) > General Options > Persistence Lifetime (seconds)
- Module: Magento\_PageCache, Magento\_Customer

### **section\_data\_ids**

Stores customer-specific information related to shopper-initiated actions such as display wish list, checkout information, etc.

- Is Secure? No
- HTTP Only: No
- Expiration Policy: Session
- Module: Magento\_Customer

### **store**

Tracks the specific store view / locale selected by the shopper.

- Is Secure? No
- HTTP Only: Yes
- Expiration Policy: 1 year
- Module: Magento\_Store

## Google Analytics Cookies

The following cookies are used when [Google Analytics](#) is fully enabled for your Magento installation. To disable these cookies for GDPR compliance, see: [Google Settings for GDPR](#). To learn more, see: [Google Analytics Cookie Usage on Websites](#).

### Google Analytics Cookies (Non-Exempt)

JavaScript Library: ga.js:

- `__utma`: Distinguishes shoppers and sessions .This cookie is created when the JavaScript library executes and there is no existing `__utma` cookie. The cookie is updated every time data is sent to Google Analytics.
- `__utmt`: Used to throttle request rate.
- `__utmb`: Determines new sessions/visits. This cookie is created when the JavaScript library executes and there is no existing `__utmb` cookie. The cookie is updated every time data is sent to Google Analytics.
- `_utmz`: Saves the traffic source or campaign that explains how the shopper reached your site. The cookie is created when the JavaScript library executes, and is updated every time data is sent to Google Analytics.
- `__utmv`: Stores visitor-level custom variable data. This cookie is created when a developer uses the `_setCustomVar` method with a visitor-level custom variable. This cookie is updated every time data is sent to Google Analytics.

## Accessibility

Some visitors to your site rely on keyboard controls for navigation —rather than a mouse — while others might use touch or voice commands. Although keyboard navigation controls vary by browser and platform, the Tab key is commonly used to move the focus through the fields, links, and buttons on a page. To learn more, see [Keyboard Shortcuts](#).

### Keyboard Navigation

ENVIRONMENT	COMMAND	
Windows	Next Page	Alt + Right
	Previous Page	Alt + Left
	Next Field	Tab
	Previous Field	Shift + Tab

**Keyboard Navigation (cont.)**

ENVIRONMENT	COMMAND	
macOS	Next Page	Cmd + Right
	Previous Page	Cmd + Left
	Next Field	Tab
	Previous Field	Shift-Tab
General	Button - choose	Enter (Return)
	Link - go to	Enter (Return)
	Options - navigate	Up, Down, Left, Right
	Options - choose	Spacebar
	Slider	Left, Right, Home, End
	Close	Esc
	Scroll Vertically	PgUp, PgDn
	Scroll Horizontally	Left, Right

# CATALOG

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  - Search Engine Optimization
  - Related Products, Up-sells, and Cross-sells
  - Customizable Options
  - Product in Websites
  - Design
    - Scheduled Design Update
  - Gift Options
  - Downloadable Information
  - Grouped Products
  - Bundle Items

### Managing Pricing

- Advanced Pricing
  - Group Pricing
  - Special Pricing

### Tier Pricing

- Minimum Advertised Price
  - MAP Logic
  - MAP Configuration

### Managing Inventory

- Stock Options
  - Product Stock Options
  - Stock Message Scenarios
- Product Alerts
  - Product Alert Run Settings

### Images and Videos

- Uploading Product Images
- Adding Product Video
- Media Gallery
- Placeholders
- Watermarks
- Swatches
  - Creating Swatches

### Categories

- Best Practices
- Creating Categories
  - Root Categories
  - Hidden Categories
- Content Settings
- Display Settings
- Search Engine Optimization
- Products in Category
- Design Settings

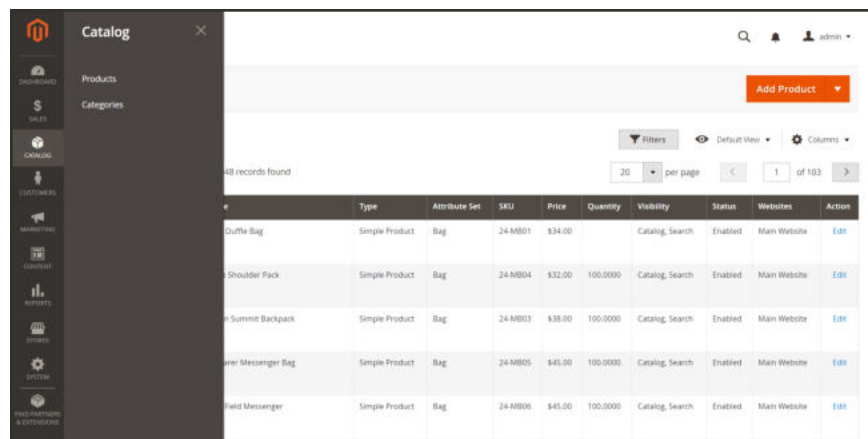
### Using Product Attributes

- Best Practices
- Adding an Attribute
- Attribute Input Types
  - Date & Time Options

### Using a Flat Catalog

## CHAPTER 10: Catalog Menu

The Catalog Menu provides easy access to product creation, category and inventory management tools.

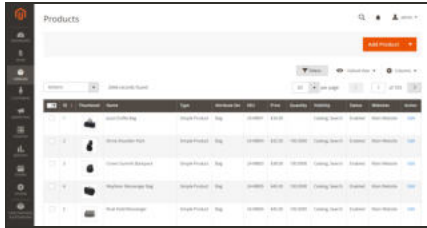


*Catalog Menu*

### To display the Catalog menu:

On the Admin sidebar, tap **Catalog**.

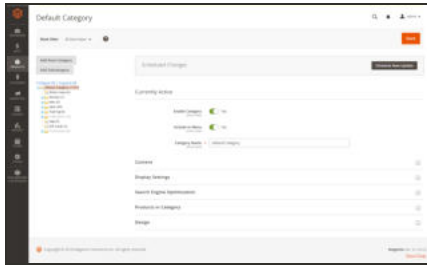
## Menu Options



### Products

---

Create new products of every type, and manage your inventory.



### Categories

---

Create the category structure that is the foundation of your store's navigation.

## Catalog URLs

The URLs you assign to products and categories play a major role in determining how well your site is indexed by search engines. Before you start building your catalog is an ideal time to consider the available options.

### URL Formats

#### Dynamic URL

A dynamic URL is created “on the fly,” and might include a query string with variables for the product ID, sort order, and the page where the request was made. When a customer searches for a product in your store, the resulting URL might look something like this:

```
http://mystore.com/catalogsearch/result/?q=racer+back  
http://mystore.com/women/tops-women.html?style_general=135
```

#### Static URL

A static URL is a fixed address for a specific page. A static URL can be displayed in a search-engine friendly format, or one that references products and categories by ID. Search-engine friendly URLs include words that people might use to look for a product, and require Web Server Rewrites to be enabled. Files with static URLs are commonly used for product and category pages, content pages, and **theme assets**.

```
http://mystore.com/antonia-racer-tank.html
```

### URL Components

#### URL Key

The URL key is the part of a static URL that describes the product or category. When you create a product or category, an initial URL key is automatically generated, based on the name. To change the URL key, see the **Search Engine Optimization** section of the product information.

The URL key should consist of lowercase characters with hyphens to separate words. A well-designed, “search engine friendly” URL key might include the product name and key words to improve the way it is indexed by search engines. The URL key can be configured to create an automatic redirect if the URL key changes.



## HTML Suffix

Your catalog can be configured to either include or exclude the suffix as part of category and product URLs. There are various reasons why people might choose to use or to omit the suffix. Some believe that the suffix no longer serves any useful purpose, and that pages without a suffix are indexed more effectively by search engines. However, your company might have a standardized format for URLs that requires a suffix.

Because the suffix is controlled by the system configuration, you should never type it directly into the URL key of a category or product. (Doing so will result in a double suffix at the end of the URL.) Whether you decide to use the suffix or not, be consistent and use the same setting for all your product and category pages. Here are examples of URLs with—and without—a suffix.

```
http://mystore.com/helena-hooded-fleece.html
http://mystore.com/helena-hooded-fleece.htm
http://mystore.com/helena-hooded-fleece
```

## Category Path

You can configure the URL to either include or exclude the category path. By default, the category path is included in all category and product pages. The following examples show the same product URL with, and without, the category path.

### URL with Category Path

```
http://mystore.com/women/tops-women/hoodies-and-sweatshirts-women/helena-
hooded-fleece.html
```

### URL without Category Path

```
http://mystore.com/helena-hooded-fleece.html
```

To prevent search engines from indexing multiple URLs that lead to the same content, you can exclude the category path from the URL. Another method is to use a canonical meta tag to let search engines know which URLs to index and which to ignore. By default, Magento does not include the category path in product URLs.

### To configure catalog URLs:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Search Engine Optimizations** section, and do the following:
  - a. Set **Product URL Suffix** to “html” or “htm.” Enter the suffix without a period, because it is applied automatically.
  - b. Set **Category URL Suffix** to “html” or “htm.” Enter the suffix without a period, because it is applied automatically.
  - c. Set **Use Categories Path for Product URLs** to your preference.

### *Search Engine Optimization*

4. When complete, tap **Save Config**.
5. When prompted, click the **Cache Management** link in the system message, and refresh the invalid cache.



### *Refresh Cache*

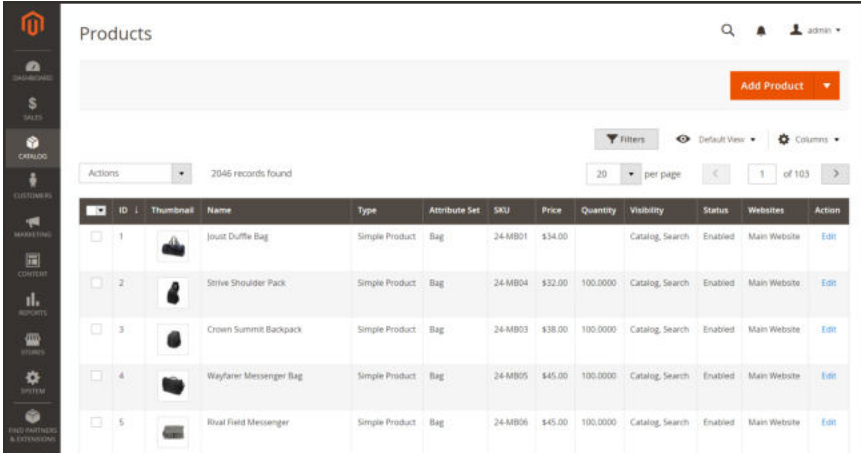


## CHAPTER 11: Products Grid






All products in the catalog are accessible from the [Products](#) page, where you can create new products and edit existing ones. For a multisite installation, each website can offer a different selection of products for sale from the same catalog.

The Products grid lists all products in the catalog, indicates the website(s) where they are available, and if they are currently enabled for sale.

You can browse through the list page by page, or search for specific products. Use the standard [controls](#) to sort and filter the list, and apply [actions](#) to selected products.

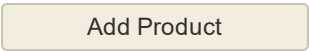


The screenshot shows the 'Products' page in the Magento admin interface. It features a sidebar on the left with navigation icons for Dashboard, Sales, Catalog, Customers, Reports, System, and Integrations. The main content area displays a table of products with the following data:

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
1		Joust Duffle Bag	Simple Product	Bag	24-MB01	\$34.00		Catalog, Search	Enabled	Main Website	Edit
2		Strike Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	100,000	Catalog, Search	Enabled	Main Website	Edit
3		Crown Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	100,000	Catalog, Search	Enabled	Main Website	Edit
4		Wayfarer Messenger Bag	Simple Product	Bag	24-MB05	\$45.00	100,000	Catalog, Search	Enabled	Main Website	Edit
5		Rival Field Messenger	Simple Product	Bag	24-MB06	\$45.00	100,000	Catalog, Search	Enabled	Main Website	Edit

*Products Grid*

## Workspace Controls

CONTROL	DESCRIPTION
	<p>Initiates the process to create a new simple product. To choose a specific product type, click the down arrow. Options:</p> <ul style="list-style-type: none"> <li>Simple Product</li> <li>Configurable Product</li> <li>Grouped Product</li> <li>Virtual Product</li> <li>Bundle Product</li> <li>Downloadable Product</li> </ul>
Actions	<p>Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the checkbox in the first column of each product. Options:</p> <ul style="list-style-type: none"> <li>Delete</li> <li>Change Status</li> <li>Update Attributes</li> </ul>
Filters	Initiates a catalog search based on the current filters.
[Default] View	Indicates the current grid column layout. If there are saved grid column views, you can choose another.
Columns	<p>Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the checkbox in the first column of each product. Product list actions include:</p> <ul style="list-style-type: none"> <li>Delete</li> <li>Change Status</li> <li>Update Attributes</li> </ul> <p>Use the <b>Columns control</b> to customize the selection of columns in the grid.</p>
<b>Actions</b>	<p>Can be used to select multiple records as the target of action. The checkbox is marked in the first column of each selected record.</p> <p>Options: Select/Deselect All</p>
Edit	Opens the product in edit mode. You can accomplish the same thing by clicking anywhere on the row.

## Default Columns

COLUMN	DESCRIPTION
(Checkbox)	<p>Selects multiple records to be subject to an action. The checkbox in the first column of each selected record is marked . Options:</p>

**Default Columns (cont.)**

COLUMN	DESCRIPTION
	Select All Selects all records found that match the current filter settings.
	Select All on This Page Selects only the records found on the current page that match the filter settings.
ID	A unique, sequential number that is assigned when a new product is saved for the first time.
Thumbnail	Displays a thumbnail of the main product image.
Name	The product name.
Type	The product type.
Attribute Set	The name of the attribute set that is used as a template for the product.
SKU	The unique Stock Keeping Unit that is assigned to the product.
Price	The unit price of the product.
Quantity	The quantity that is currently in stock.
Visibility	Indicates where the product is visible in the catalog. Options: Not Visible Individually Catalog Search Catalog, Search
Status	Indicates the current status of the product. Options: Enabled Disabled
Websites	Indicates the website(s) where the product is available.
Action	Opens the product in Edit mode.



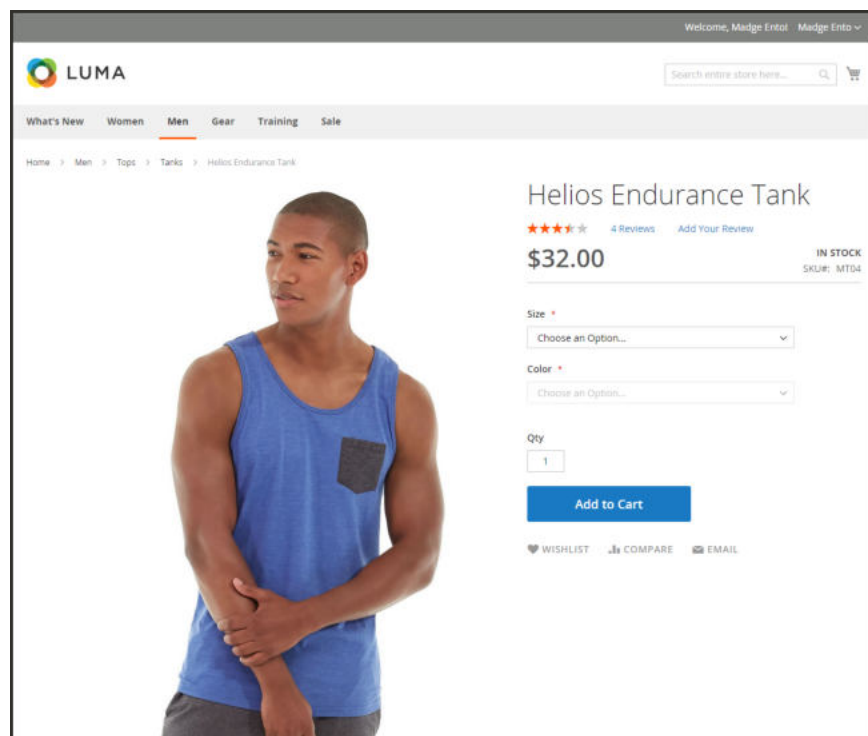
## CHAPTER 12:

# Creating Products

Choosing a product type is one of the first things you must do to create a new product. In this chapter, you will learn how to create a product of each type. In addition to the basic product types, the term, **complex product**<sup>1</sup> is sometimes used to refer to products with multiple options, such as a configurable product that is available in various colors and sizes. To learn more about the available options, see [Product Settings](#) and [Advanced Settings](#).

If you are just starting out, you can create a few sample products to experiment with each product type. For a deeper understanding, make sure to read about catalog [navigation](#), how to set up [categories](#) and [attributes](#), and the catalog [URL options](#) that are available to you.

After you learn the basics, the most efficient way to add a large number of products to the catalog is to [import](#) them from a CSV file.



*Product Catalog*

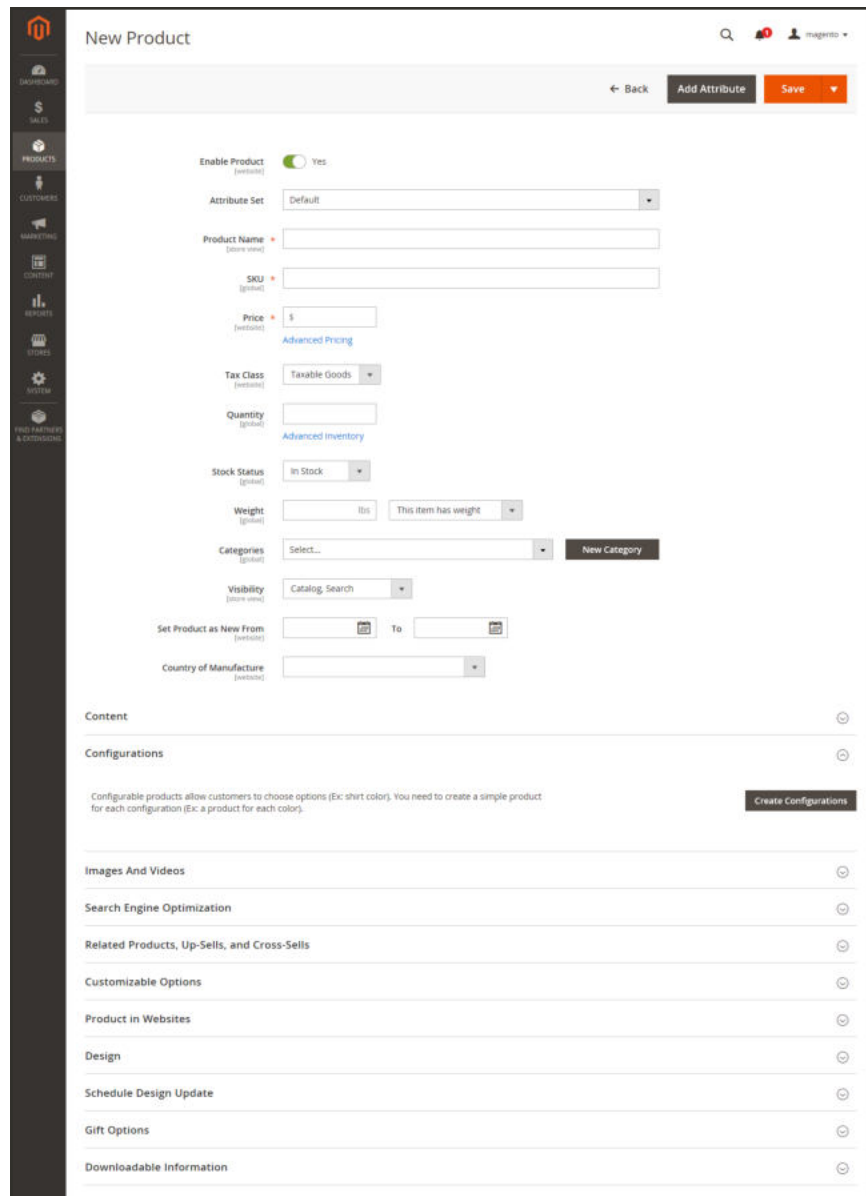
---

<sup>1</sup>A product that requires the customer to choose from a selection of options.



# Product Workspace



The product workspace is basically the same for all product types, although the selection of fields changes depending on the attribute set that is used. The product attributes are at the top of the form, followed by expandable sections of product information. When a new product is saved for the first time, the Store View chooser appears in the upper-left of the form.



*Product Workspace*

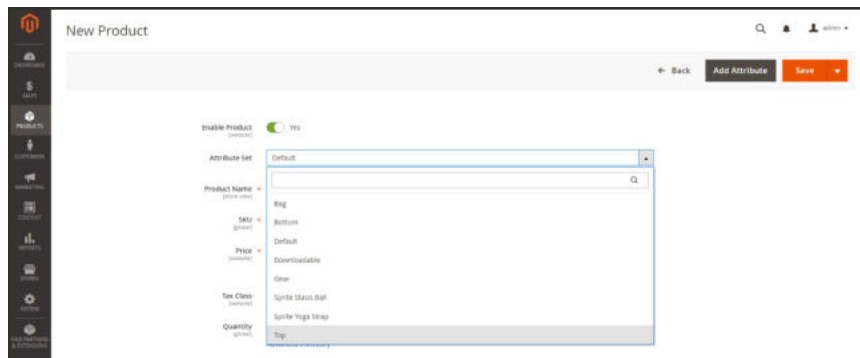
### Enable Product

The online status of the product is indicated by the switch at the top of the form. To change the online status, simply set the Enable Product switch to the “Yes” or “No” position.

CONTROL	DESCRIPTION
	Indicates that the product is currently online.
	Indicates that the product is currently offline.

### Attribute Set

The name of the **attribute set** appears in the upper-left corner, and determines the fields that appear in the product record. To choose a different attribute set, click the down arrow next to the default attribute set name.



*Attribute Sets*

### Expand/Collapse

To expand or collapse a section, tap either the expand ☺ or collapse ☹ button to the right.

## Save Menu

The Save menu includes several options that let you save and continue, save and create a new product, save and duplicate the product, or save and close.



*Save Menu*

## Save Menu

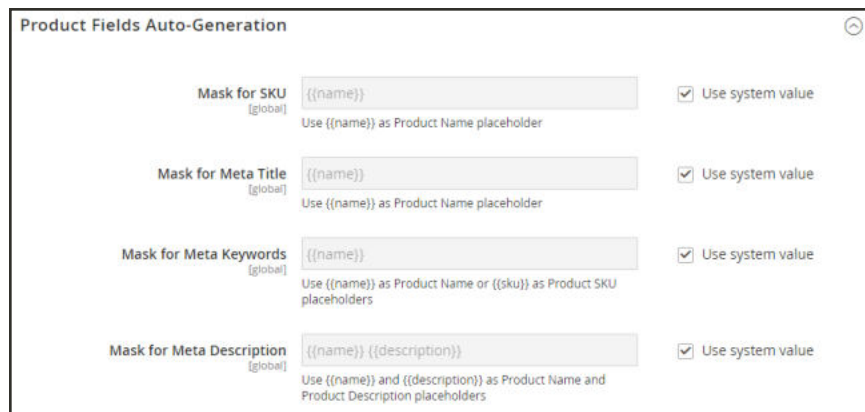
COMMAND	DESCRIPTION
Save	Save the current product, and continue working.
Save & New	Save and close the current product, and begin a new product, based on the same product type and template.
Save & Duplicate	Save and close the current product, and open a new duplicate copy.
Save & Close	Save the current product and return to the Inventory workspace.

## Default Field Values

To save time when creating products, the default value of several product fields references values from another field. You can either accept the default value, or enter another. The following fields have automatically generated default values:


FIELD	DESCRIPTION
SKU	Based on product Name.
Meta Title	Based on product Name.
Meta Keywords	Based on product Name.
Meta Description	Based on product Name and Description.

The placeholders that represent the value of another field are enclosed in double-curly braces. Any attribute code that is included in the product **attribute set** can be used as a placeholder.



*Product Fields Auto-Generation*

### To edit the placeholder value:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Product Fields Auto-Generation** section. Then, make any changes needed to the placeholder values.

For example, if there's a specific keyword that you want to include for every product, or a phrase that you want to include in every meta description, you can type the value directly into the appropriate field.

If you want to keep the existing placeholder values, be careful to preserve the double curly braces that enclose each markup tag.

4. When complete, tap **Save Config**.

### Common Placeholders

#### PLACEHOLDER

{{color}}

{{country\_of\_manufacture}}

{{description}}

{{gender}}

{{material}}

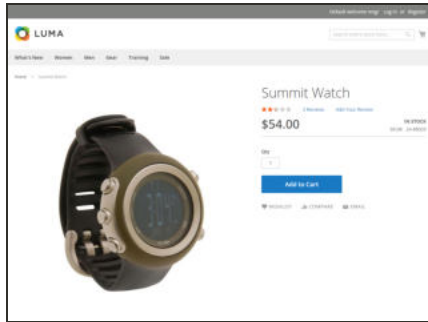
{{name}}

{{short\_description}}

{{size}}

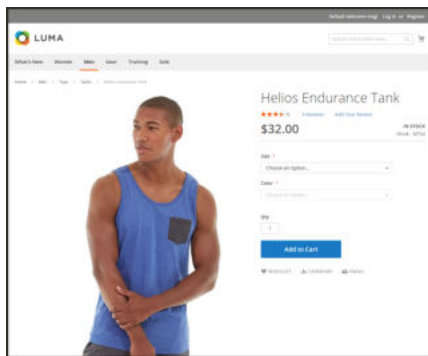
{{sku}}

# Product Types



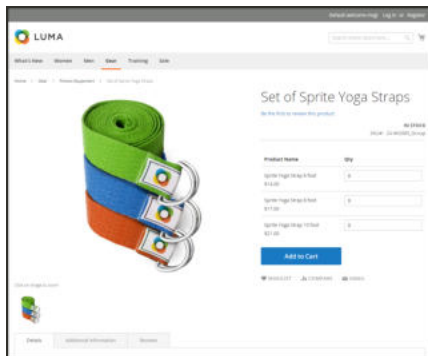
## Simple Product

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



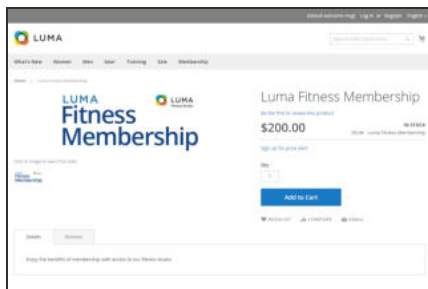
## Configurable Product

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



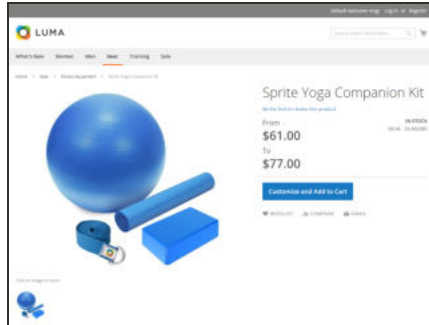
## Grouped Product

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



## Virtual Product

Virtual products are not tangible products, and are typically used for products such as services, memberships, warranties, and subscriptions. Virtual products can be used in association with grouped and bundle products.



## Bundle Product

---

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



## Downloadable Product

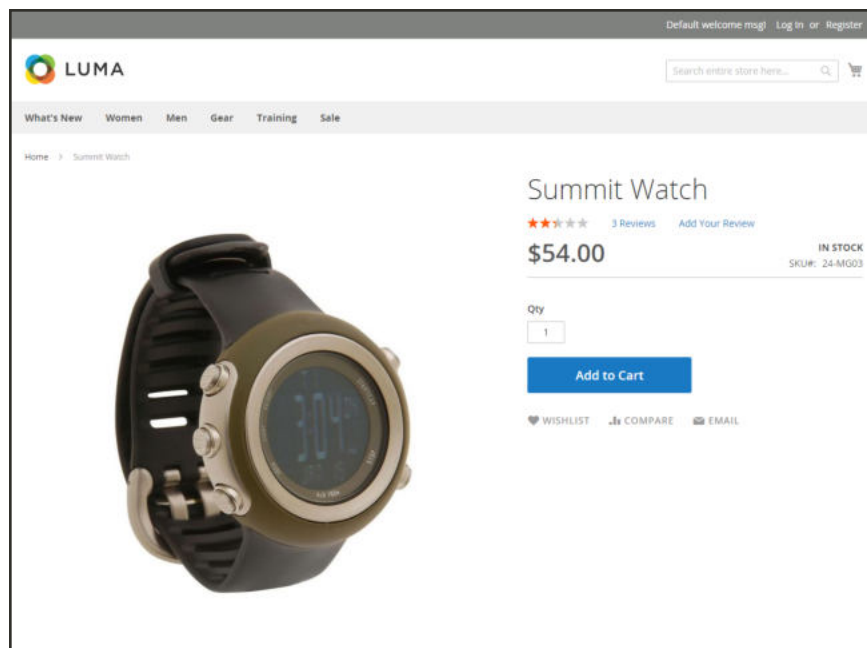
---

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

## Simple Product

One of the keys to harnessing the power of product types is learning when to use a simple, standalone product. A simple product can be sold individually, or as part of a grouped, configurable, or bundle product. A simple product with custom options is sometimes referred to as a composite product.

The following instructions take you through the process of creating a simple product using a **product template**, required fields, and basic settings. Each required field is marked with a red asterisk (\*). When you finish the basics, you can complete the **advanced settings** and **other settings** as needed.




*Simple Product*

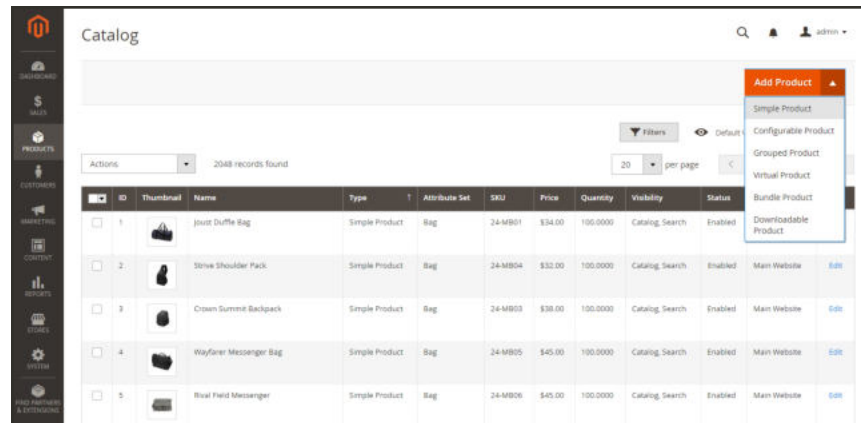
### Process Overview:

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Attribute Set**
- Step 3: **Complete the Required Settings**
- Step 4: **Complete the Basic Settings**
- Step 5: **Complete the Product Information**
- Step 6: **Publish the Product**



## Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (  ) menu, choose **Simple Product**.



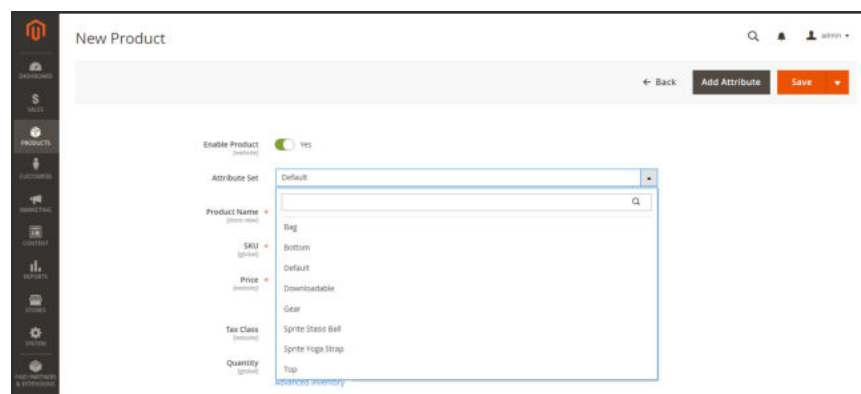
*Add Simple Product*

## Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set.
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.



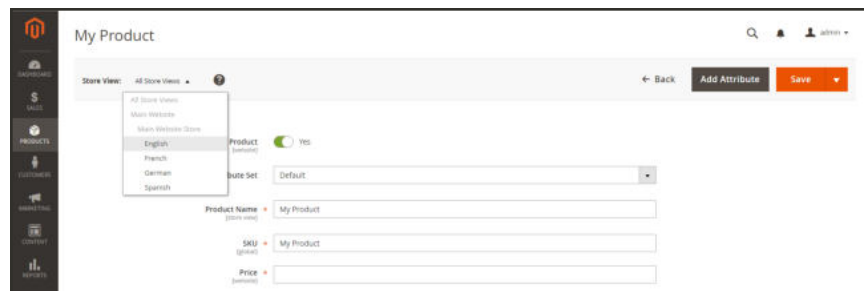
*Choose Attribute Set*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No”  position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*

### Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. Enter the **Quantity** of the product that is currently in stock.

Take note that by default, **Stock Status** is set to “In Stock.”

**Inventory Management:** If you enable **Inventory Management**, Single Source merchants set the quantity in this section. Multi Source merchants add sources and quantities in the Sources section. See the following Assign Sources and Quantities (Inventory Management) section.

3. Enter the **Weight** of the product.
4. Accept the default **Visibility** setting, “Catalog, Search.”
5. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

**Choose an existing category:**

- a. Start typing in the box to find a match.
- b. Mark the checkbox of each category that is to be assigned.

**Create a new category:**

- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
6. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
  7. Choose the **Country of Manufacture**.

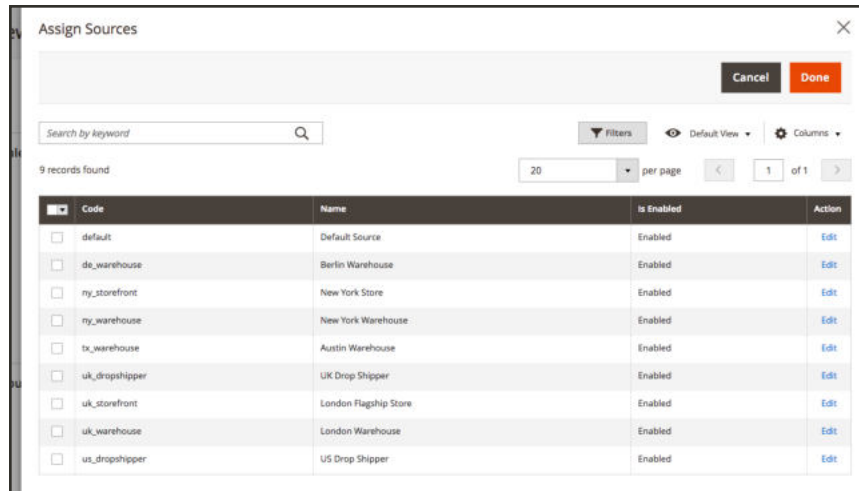
*Product Details*

There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.

**Assign Sources and Quantities (Inventory Management)**

For Multi Source merchants using Inventory Management, scroll down to the Sources section and assign sources and quantities:

1. To add a source, tap **Assign Sources**. The Assign Sources page displays.
2. Browse or search for a source you want to add. Select the checkbox next to the source(s) you want to add for the product.



*Assign sources to the product*

3. Tap **Done** to add the sources.
4. To change settings and quantities per assigned source, do the following:
  - a. Set **Source Item Status** to In Stock.
  - b. Enter an amount update the **Qty** for on-hand stock.
  - c. To set a notification for inventory quantities, do one of the following:

Custom Notify Quantity

Clear the **Notify Quantity Use Default** checkbox and enter an amount in **Notify Quantity**.

Default Notify Quantity

Select the **Notify Quantity Use Default** checkbox. Magento checks and uses the setting in Advanced Inventory or global Store configuration.

Assign Sources  
Advanced Inventory

Assigned Sources

Name	Source Status	Source Item Status	Qty *	Notify Qty	
Default Source	Enabled	In Stock ▼	0	1	
				<input checked="" type="checkbox"/> Use Default	
Germany Warehouse	Enabled	In Stock ▼	324	1	
				<input checked="" type="checkbox"/> Use Default	
London Warehouse	Enabled	In Stock ▼	130	1	
				<input checked="" type="checkbox"/> Use Default	
UK Drop Shipper	Enabled	In Stock ▼	1003	1	
				<input checked="" type="checkbox"/> Use Default	

*Update Product Quantities per Source*

### Step 5: Complete the Product Information

Scroll down and complete the information in the following sections as needed:

- [Content](#)
- [Images and Videos](#)
- [Related Products, Up-Sells, and Cross-Sells](#)
- [Search Engine Optimization](#)
- [Customizable Options](#)
- [Products in Websites](#)
- [Design](#)
- [Gift Options](#)

### Step 6: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” position.
2. Do one of the following:

### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (▼) menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close

On the **Save** (☐) menu, choose **Save & Close**.



*Save & Close*

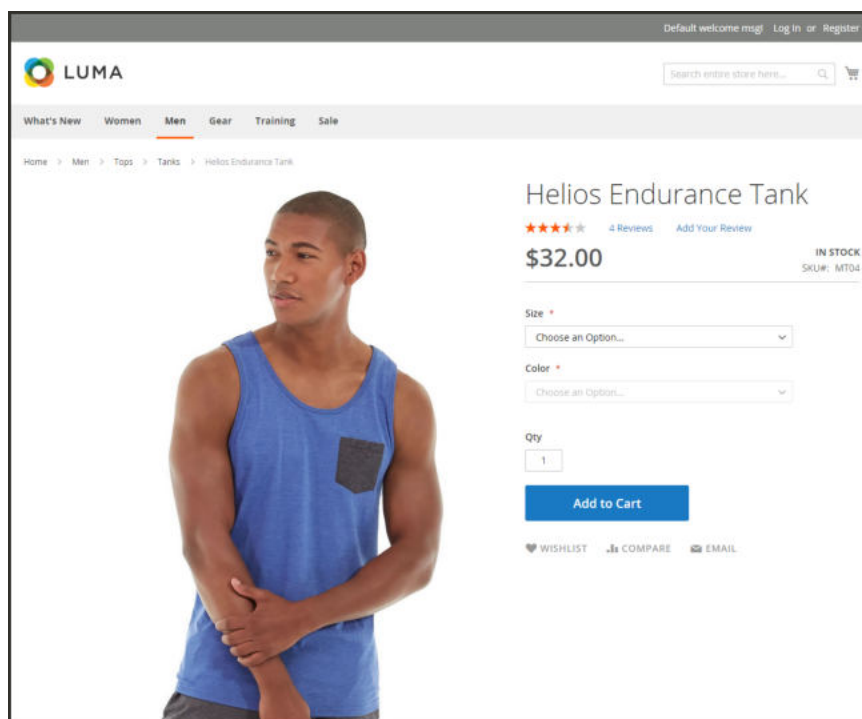
### THINGS TO REMEMBER

- ☑ Simple products can be included in configurable, bundle, and grouped product types.
- ☑ A simple product can have custom options with a variety of input controls, which makes it possible to sell many product variations from a single SKU.

## Configurable Product

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

The following instructions take you through the process of creating a configurable product using a [product template](#), required fields, and basic settings. Each required field is marked with a red asterisk (\*). When you finish the basics, you can complete the [advanced settings](#) and [other settings](#) as needed.



*Configurable Product*

## Part 1: Creating a Configurable Product

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

Before you begin, prepare an **attribute set** that includes an attribute that is set to one of the allowable input types for each product variation. For example, the attribute set might include dropdown attributes for color and size.

The properties of each attribute that is used for a configurable product variation must have the following settings:

### Product Variation Attribute Requirements

PROPERTY	SETTING
Scope	Global
Catalog Input Type for Store Owner	The input type of any attribute that is used for a product variation must be one of the following: Dropdown Visual Swatch Text Swatch
Values Required	Yes

**Process Overview:**

**Part I: Create Configurable Product**


Step 1: [Choose the Product Type](#)

Step 3: [Complete the Required Settings](#)

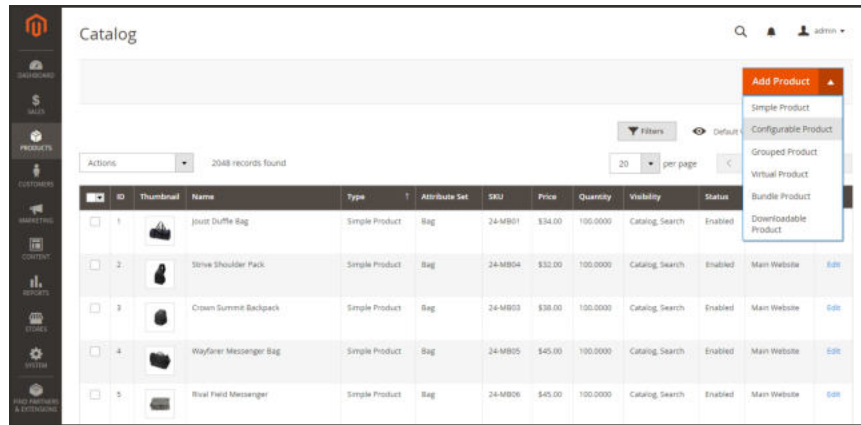
Step 4: [Complete the Basic Settings](#)

Step 5: [Save and Continue](#)

### Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (  ) menu, choose **Configurable Product**.





Add Configurable Product

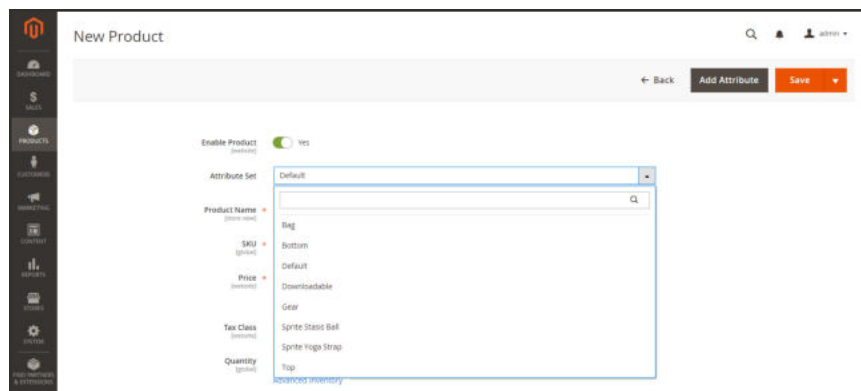
### Step 2: Choose the Attribute Set

The **attribute set** determines the selection of fields that are used in the product. The attribute set that is used in the following example has drop-down attributes for color and size. The name of the attribute set is indicated at the top of the page, and is initially set to “Default”.

- To choose the attribute set for the product, click the field at the top of the page and do one of the following:
  - In the **Search** box, enter the name of the attribute set.
  - In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.

- If you need to add an additional attribute to the attribute set, tap **Add Attribute**. Then, follow the instruction in **Adding an Attribute to a Product**.



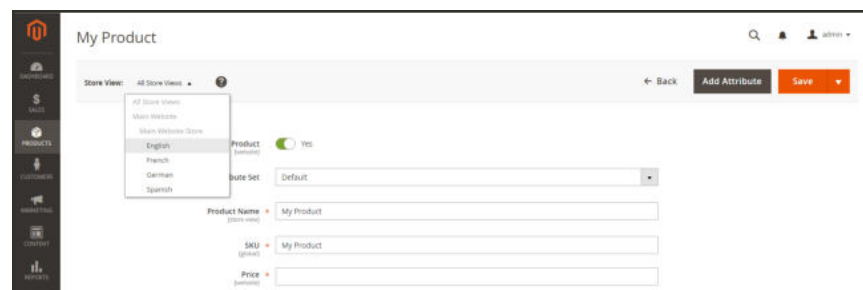
Choose Template

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set **Enable Product** to the “No” (  ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*

### Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. The **Quantity** is determined by the product variations, so you can leave it blank for now.

The Stock Status of a configurable product is determined by each associated configuration. Because the product was saved without entering a quantity, the Stock Status is now set to “Out of Stock.”

- a. Enter the product **Weight**.
  - b. Accept the default **Visibility** setting, “Catalog, Search.”
3. To feature the product in the list of **new products**, select the **Set Product as New** checkbox.
  4. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

**Choose an existing category:**

- a. Start typing in the box to find a match.
- b. Mark the checkbox of the category that is to be assigned.

**Create a new category:**

- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
5. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
  6. Choose the **Country of Manufacture**.

*Product Details*

There might be additional attributes that are used to describe the product. The selection varies attribute set, and you can complete them later.

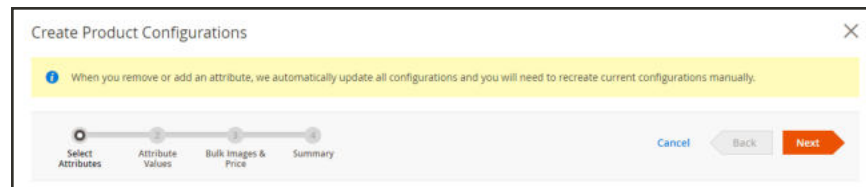
**Step 5: Save and Continue**

This is a good time to save your work. In the upper-right corner, tap **Save**. In the next step, you'll set up the configurations for each variation of the product.

## Part 2: Adding Configurations

The following example shows how to add configurations for three colors and three sizes. In all, nine simple products will be created with unique SKUs to cover every possible combination of variations. By default, the product name and SKU for each variation is based on the parent product name or SKU, plus the attribute value.

The progress bar at the top of the page shows where you are in the process, and guides you through each step.



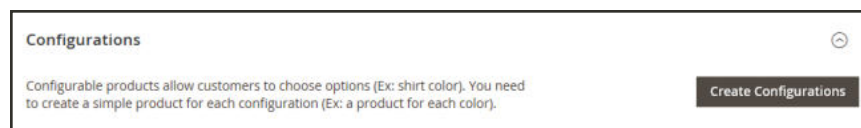
*Progress Bar*

### Process Overview: Part II: Add Configurations

- Step 1: **Choose the Attributes**
- Step 2: **Enter the Attribute Values**
- Step 3: **Configure the Images, Price, and Quantity**
- Step 4: **Generate the Product Configurations**
- Step 5: **Add a Product Image**
- Step 6: **Complete the Product Information**
- Step 7: **Publish the Product**
- Step 8: **Configure the Cart Thumbnails (Optional)**

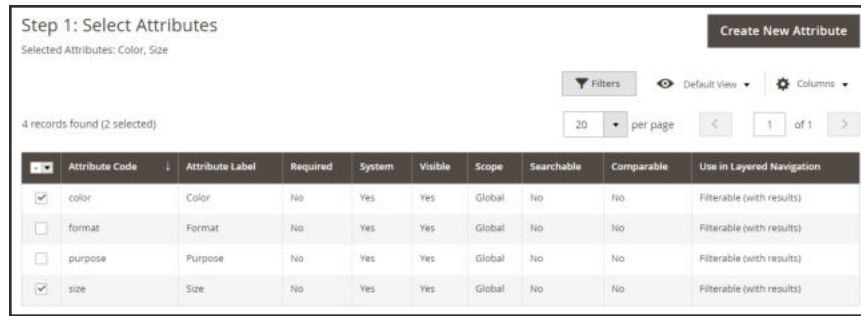
### Step 1: Choose the Attributes

- Continuing from Part I, scroll down to the **Configurations** section. Then, tap **Create Configurations**.



*Configurations*

- Mark the checkbox of each attribute that you want to include as a configuration. For this example, we choose color and size.
- The list includes all attributes from the attribute set that can be used in a configurable product.

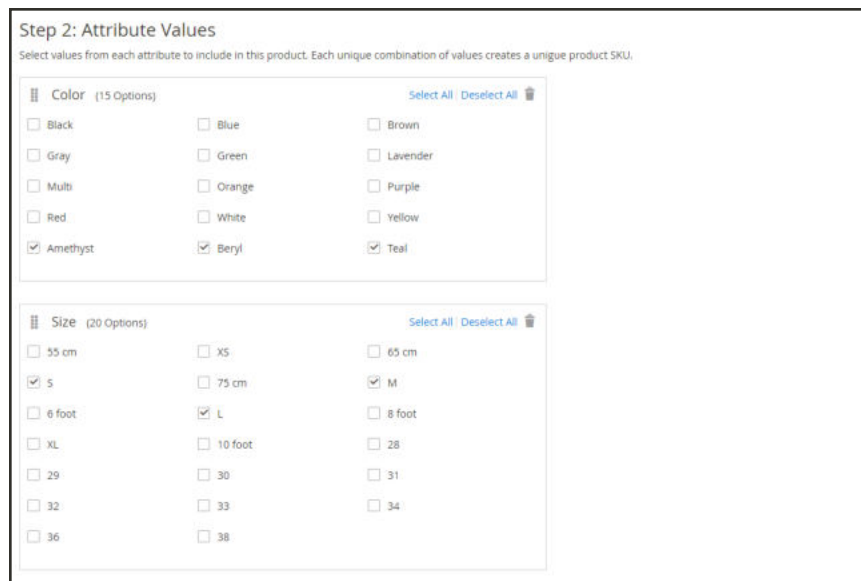



Select Attributes

4. If you need to add a new attribute, tap **Create New Attribute**. Complete the attribute properties, and tap **Save Attribute**. Then, mark the checkbox to select the attribute.
5. In the upper-right corner, tap **Next**.

### Step 2: Enter the Attribute Values

1. For each attribute, mark the checkbox of the values that apply to the product.



2. To rearrange the attributes, grab the Change Order (  ) icon and move the section to a new position. The order determines the position of the drop-down lists on the product page.
3. In the progress bar, tap **Next**.

### Step 3: Configure the Images, Price, and Quantity

This step determines the images, pricing and quantity of each configuration. The available options are the same for each, and you can choose only one. You can apply the same setting to all SKUs, apply a unique setting to each SKU, or skip the settings for now.

1. Choose the configuration options that apply.

#### Configure the Images

##### Method 1: Apply a Single Set of Images to All SKUs

1. Select **Apply single set of images to all SKUs**.
2. Browse to each image that you want to include in the product gallery, or drag them to the box.




*Use Same Images for All SKUs*

##### Method 2: Apply Unique Images for Each SKU

Because we already uploaded an image for the parent product, we'll use this option to upload an image of each color. This is the image that will appear in the shopping cart when someone buys the shirt in a specific color.

1. Select **Apply unique images by attribute to each SKU**.
2. Select the **attribute** that the images illustrate. For example: color.
3. For each attribute value, either browse to the images that you want to use for that configuration, or drag them to the box.

If you drag the an image to a value box, it appears in the sections for the other values, as well. If you want to delete an image, tap the trashcan (  ) icon.

Images

Apply single set of images to all SKUs  
 Apply unique images by attribute to each SKU  
 Skip image uploading at this time

Select attribute: Color

Amethyst

Browse to find or drag image here

*Unique Images per SKU*

## Configure the Prices

### Method 1: Apply the Same Price to All SKUs

1. If the price is the same for all variations, select **Apply single price to all SKUs**.
2. Enter the **Price**.

Price

Apply single price to all SKUs  
 Apply unique prices by attribute to each SKU  
 Skip price at this time

Price: \$ 32.00

*Same Price per SKU*

### Method 2: Apply a Different Price for Each SKU

1. If the price differs for each or for some variations of the product, select **Apply unique prices by attribute to each SKU**.
2. Select the **attribute** that is the basis of the price difference.
3. Enter the **price** for each attribute value. In this example, the XL size costs more.

Price

Apply single price to all SKUs  
 Apply unique prices by attribute to each SKU  
 Skip price at this time

Select attribute: Size

S: \$ 32

M: \$ 32

L: \$ 32

XL: \$ 34

*Unique Price per SKU*

## Configure the Quantity

### Method 1: Apply the Same Quantity to All SKUs

1. If the quantity is the same for all SKUs, select **Apply single quantity to each SKU**.
2. Enter the **Quantity**.

*Same Quantity for All SKUs*

### Apply the Same Quantity to All SKUs (Inventory Management)

For Multi Source merchants using **Inventory Management**, assign sources and add quantities for all generated product variants:

1. Select the **Apply single quantity to each SKUs** option.
2. To add a source, tap **Assign Sources**. The Assign Sources page displays.
3. Browse or search for a source you want to add. Select the checkbox next to the source(s) you want to add for the product.
4. Enter an on-hand inventory amount per source.

Source	Source Status	Quantity Per Source	Action
New York Warehouse	Enabled	300	Remove
Austin Warehouse	Enabled	350	Remove

*Same Quantity for All SKUs*

### Method 2: Apply Different Quantity by Attribute

1. If the quantity is the different for each SKU, select **Apply unique quantity by attribute to each SKU**.
2. Enter the **Quantity** for each.



*Different Quantities per Attribute*

2. When complete, tap **Next** in the upper-right corner.

#### Step 4: Generate the Product Configurations

1. Wait a moment for the list of products to appear.
2. Do one of the following:
  - If you are satisfied with the configurations, tap **Next**.
  - To make corrections, tap **Back**.

Images	SKU	Quantity	Color	Size	Price
	Jewel Tone Tee-Amethyst-S	100	Amethyst	S	\$ 39.99
	Jewel Tone Tee-Amethyst-M	100	Amethyst	M	\$ 39.99
	Jewel Tone Tee-Amethyst-L	100	Amethyst	L	\$ 39.99




*Summary*

The current product variations appear at the bottom of the Configuration section.

Step 4: Summary


New Product Review ⊙

Here are the products you're about to create.

Images	SKU	Quantity	Color	Size	Price
	Jewel Tone Tee-Amethyst-S	100	Amethyst	S	\$ 39.99
	Jewel Tone Tee-Amethyst-M	100	Amethyst	M	\$ 39.99
	Jewel Tone Tee-Amethyst-L	100	Amethyst	L	\$ 39.99

*Current Configurations*

### Step 5: Add a Product Image

1. Scroll down to the **Images and Videos** section. Then, expand  the section.
2. Click the **Camera** tile, and browse to the main image that you want to use for the configurable product.


To learn more, see: [Images and Videos](#).

### Step 6: Complete the Product Information

Scroll down and complete the information in the following sections as needed:

- [Content](#)
- [Related Products, Up-Sells, and Cross-Sells](#)
- [Search Engine Optimization](#)
- [Customizable Options](#)
- [Products in Websites](#)
- [Design](#)
- [Gift Options](#)

### Step 7: Publish the Product

1. If you are ready to publish the product in the catalog, set **Enable Product** to the “Yes” (  ) position.
2. Do one of the following:

### Method 1: Save and Preview

(This is the Drop-down text)

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** ( ▼ ) menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close

On the **Save** ( ▼ ) menu, choose **Save & Close**.



*Save & Close*

### Step 8: Configure the Cart Thumbnails (Optional)

If you have a different image for each variation you can set the configuration to use the correct image for the shopping cart thumbnail.

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under Sales, choose **Checkout**. Then, expand ☺ the **Shopping Cart** section.
3. Set **Configurable Product Image** to “Product Thumbnail Itself.”
4. When complete, tap **Save Config**.

The screenshot shows a configuration window titled "Shopping Cart" with a close button in the top right corner. It contains five rows of settings:

- Quote Lifetime (days)** [website]: A text input field containing "30" and a checked checkbox labeled "Use system value".
- After Adding a Product Redirect to Shopping Cart** [store view]: A dropdown menu showing "No" and a checked checkbox labeled "Use system value".
- Grouped Product Image** [store view]: A dropdown menu showing "Product Thumbnail Itself" and a checked checkbox labeled "Use system value".
- Configurable Product Image** [store view]: A dropdown menu showing "Product Thumbnail Itself" with a blue border and a checked checkbox labeled "Use system value".
- Preview Quote Lifetime (minutes)** [store view]: A text input field containing "30".

*Shopping Cart - Configurable Product Image*

### THINGS TO REMEMBER

- A configurable product allows the shopper to choose options from drop-down, multiple select, visual swatch and text swatch input types. Each option is actually a separate, simple product.
- The attributes that are used for product variations must have a global scope and the customer must be required to choose a value. The product variation attributes must be included in the attribute set that is used as a template for the configurable product.
- The attribute set that is used as a template for a configurable product must include the attribute(s) that contain the values that are needed for each product variation.
- The thumbnail image in the shopping cart can be set to display the image from the configurable product record, or from the product variation.

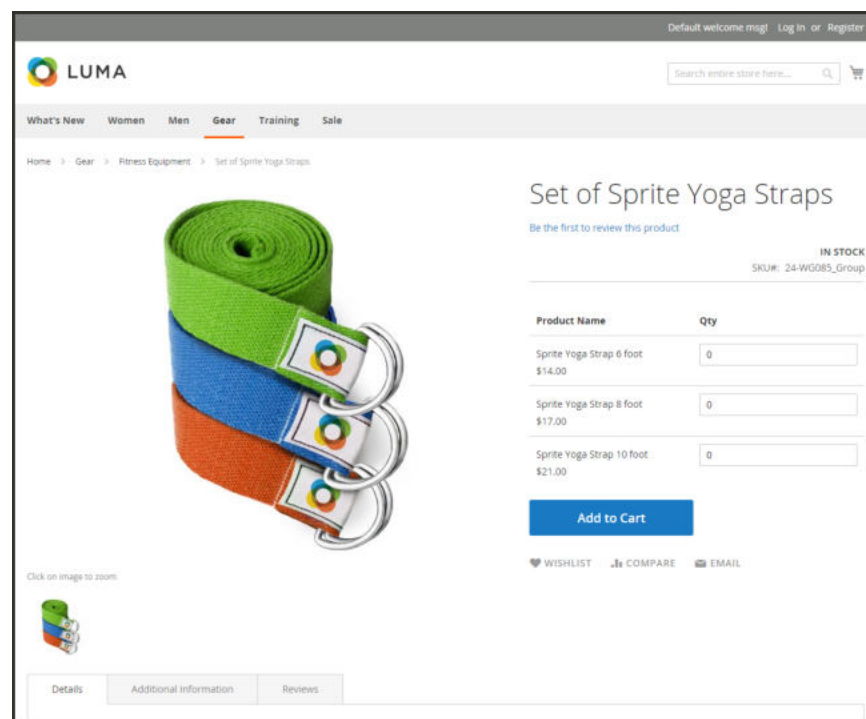
## Grouped Product

A grouped product consists of simple standalone products that are presented as a group. You can offer variations of a single product, or group them by season or theme. Presenting a grouped product can create an incentive for customers to purchase additional items. A grouped product provides an easy way to offer variations of a product, and list them all on the same page.

For example, you might sell open stock flatware, and list every type of utensil that is used in a formal place setting. Some might order multiple salad forks, fish forks, dinner forks, dinner knives, fish knives, butter knives, soup spoons, and dessert spoons. Other customers might order a simple fork, knife, and spoon. Customers can order as many of each item as they want.

Although they are presented as a group, each product in the group is purchased as a separate item. In the shopping cart, each item and the quantity purchased appears a separate line item.

The following instructions take you through the process of creating a grouped product using a [product template](#), required fields, and basic settings. Each required field is marked with a red asterisk (\*). When you finish the basics, you can complete the [advanced settings](#) and [other settings](#) as needed.



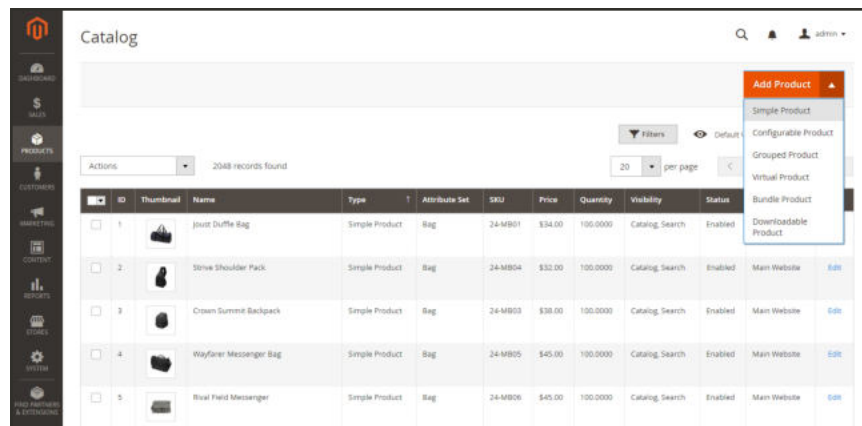
*Grouped Product*

**Process Overview:**

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Attribute Set**
- Step 3: **Complete the Required Settings**
- Step 4: **Complete the Basic Settings**
- Step 5: **Add Products to the Group**
- Step 6: **Publish the Product**
- Step 7: **Configure the Cart Thumbnails (Optional)**

### Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.
2. In the upper-right corner on the **Add Product** ( ) menu, choose **Grouped Product**.



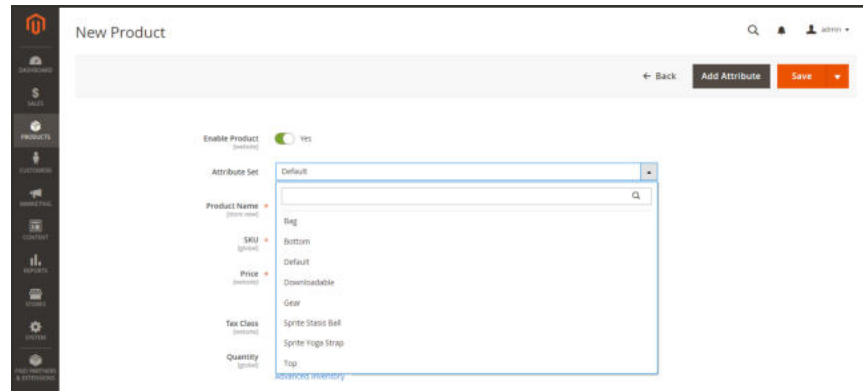
*Add Simple Product*

### Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set.
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.



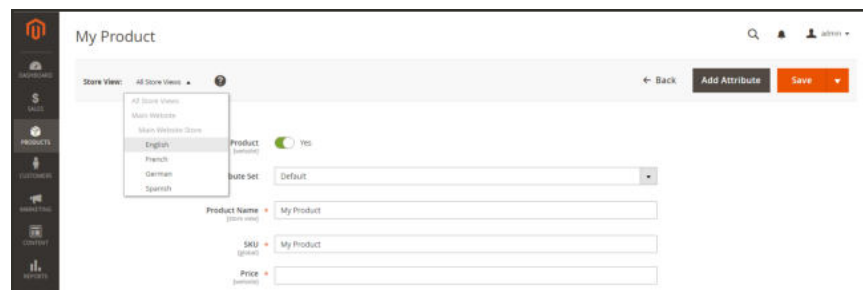
Choose Template

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.  
Take note that the **Quantity** field is not available because the value is derived from the individual products that make up the group.
3. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” (  ) position.
4. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

5. Choose the **Store View** where the product is to be available.



Choose Store View

### Step 4: Complete the Basic Settings

1. Accept the **Stock Status** setting, “In Stock.”
2. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

**Choose an existing category:**

- a. Start typing in the box to find a match.
- b. Mark the checkbox of the category that is to be assigned.

**Create a new category:**

- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
3. Accept the **Visibility** settings, “Catalog, Search.”
  4. To feature the product in the list of **new products**, choose the **Set Product as New From** and **To** dates on the calendar.
  5. Choose the **Country of Manufacture**.

There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.

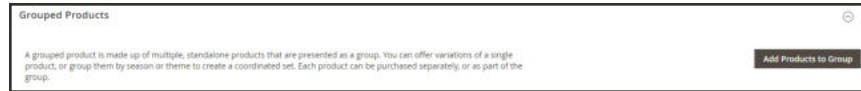
The screenshot displays the 'My Grouped Product' configuration page in the Magento Admin. At the top, there's a navigation bar with 'Back', 'Add Attribute', and 'Save' buttons. A yellow banner indicates 'You saved the product.' The main form includes several sections: 'Enable Product' (toggled off), 'Attribute Set' (Default), 'Product Name' (My Grouped Product), 'SKU' (My Grouped Product), 'Quantity' (0), 'Stock Status' (In Stock), 'Categories' (Select...), 'Visibility' (Catalog, Search), 'Set Product as New From' and 'To' dates, and 'Country of Manufacture'.

*Grouped Product Details*



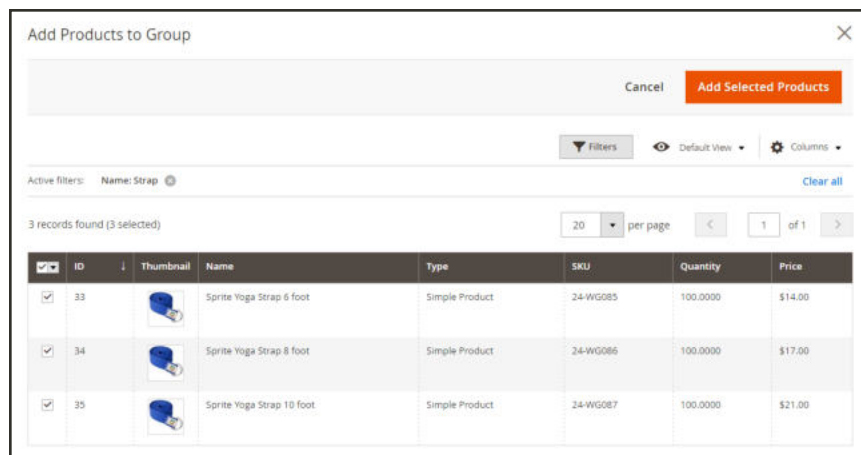
### Step 5: Add Products to the Group

1. Scroll down to the **Grouped Products** section. Then, tap **Add Products to Group**.



*Grouped Products*

2. If necessary, use the **filters** to find the products that you want to include in the group.
3. In the list, mark the checkbox of each item that you want to include in the group.

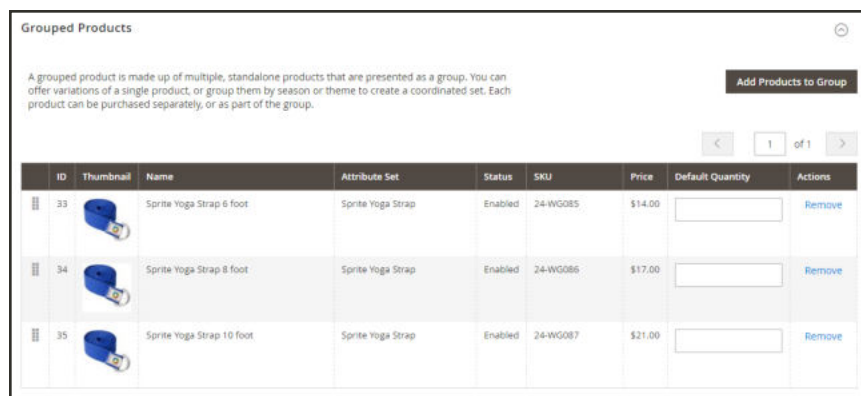


*Add Selected Products*


4. Tap **Add Selected Products** to add them to the group.

The selected products appear in the Grouped Products section.

For Multi Source merchants with Inventory Management, the grid includes a **Quantity per Source** column with each assigned source and inventory stock amount.



*Products in Group*


5. Then, do any of the following:
  - Enter a **Default Quantity** for any of the items.
  - To change the order of the products, grab the **Change Order** icon (  ) in the first column, and drag the product to the new position in the list.
  - To remove a product from the group, click **Remove**.

### Step 5: Complete the Product Information


Complete the information in the following sections as needed:

- **Content**
- **Images and Videos**
- **Search Engine Optimization**
- **Related Products, Up-Sells, and Cross-Sells**
- **Customizable Options**
- **Products in Websites**
- **Design**
- **Gift Options**

### Step 6: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:


#### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (  ) menu. The store opens in a new browser tab.



*Customer View*

## Method 2: Save and Close


On the **Save** (  ) menu, choose **Save & Close**.

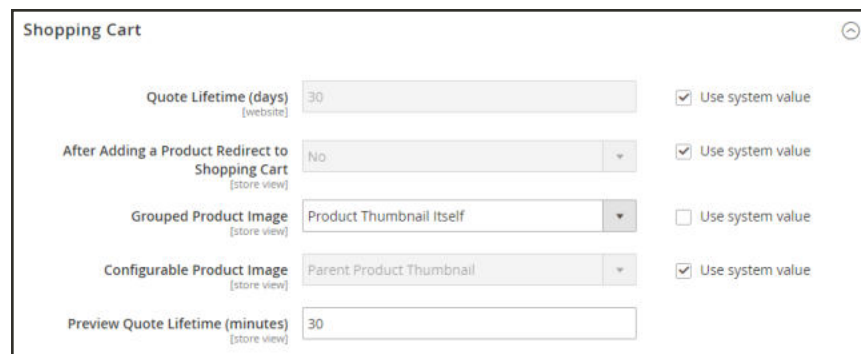


*Save & Close*

## Step 7: Configure the Cart Thumbnails (Optional)

If you have a different image for each product in the group, you can set the configuration to use the correct image for the shopping cart thumbnail.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand  the **Shopping Cart** section. Then, do the following:
  - a. If necessary, clear the Use system value checkbox.
  - b. Set **Grouped Product Image** to “Product Thumbnail Itself.”
4. Tap **Save Config**.



*Shopping Cart*

**THINGS TO REMEMBER**

- A grouped product is essentially a collection of simple associated products.
  
- Each item purchased appears individually in the shopping cart, rather than as part of the group.
  
- The thumbnail image in the shopping cart can be set to display the image from the grouped parent product, or associated product.

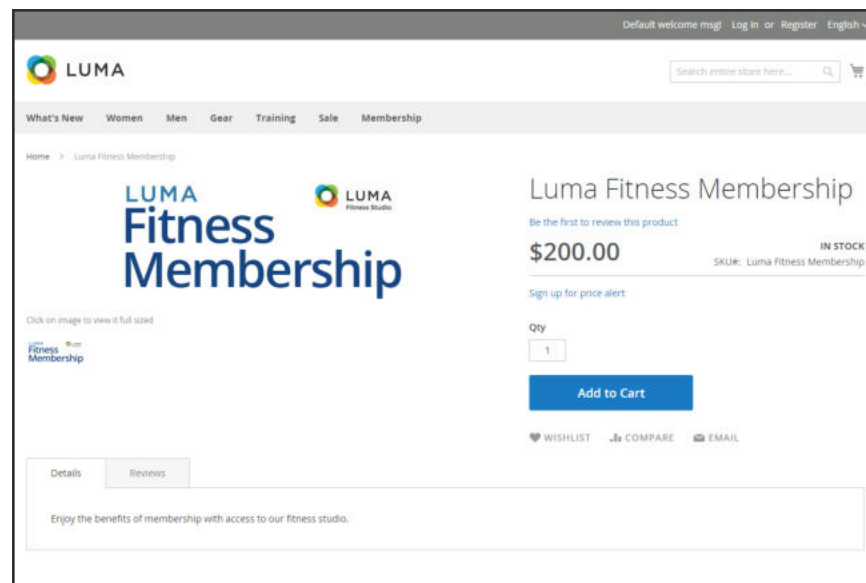
## Virtual Product

Virtual products — or digital goods — represent non-tangible items such as memberships, services, warranties, or subscriptions and digital downloads of books, music, videos, or other products. Virtual products can be sold individually, or included as part of the following product types:

- **Grouped Product**
- **Bundle Product**

Aside from the absence of the Weight field, the process of creating a virtual product and a simple product is the same. The following instructions take you through the process of creating a virtual product using a **product template**, required fields, and basic settings. When you finish the basics, you can complete the **advanced settings** and **other settings** as needed.

PayPal has deprecated support for the sale of digital goods through PayPal Express Checkout, and recommends that you use either **PayPal Payments Standard** or any other PayPal payment gateway to process any order that includes virtual products.




*Virtual Product*

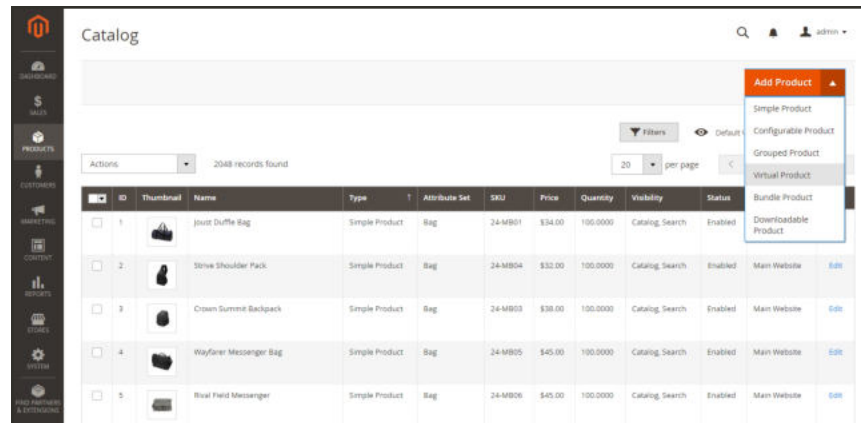
### Process Overview:

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Attribute Set**
- Step 3: **Complete the Required Settings**
- Step 4: **Complete the Basic Settings**
- Step 5: **Complete the Product Information**
- Step 6: **Publish the Product**



## Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (  ) menu, choose **Virtual Product**.



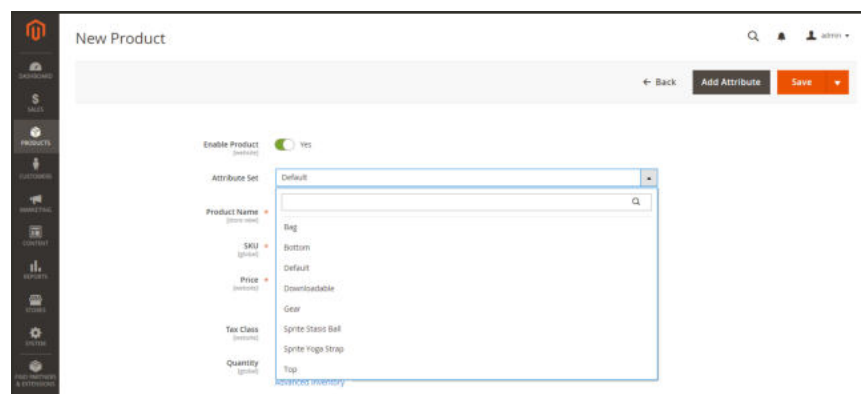
*Add Virtual Product*

## Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set.
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.



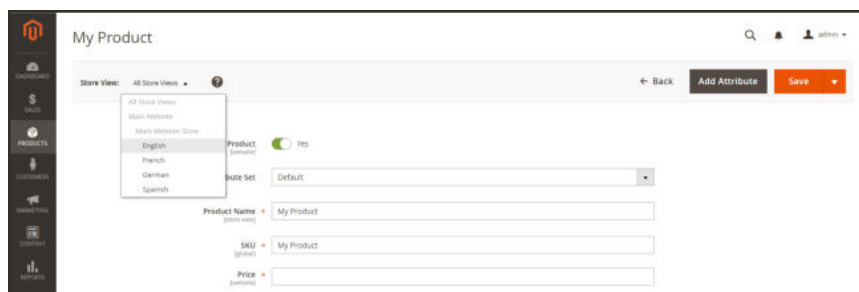
*Choose Attribute Set*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” (  ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*

### Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. Enter the **Quantity** of the product that is currently in stock. Then, do the following:
  - a. Accept the default **Stock Status** setting, “In Stock.”
 

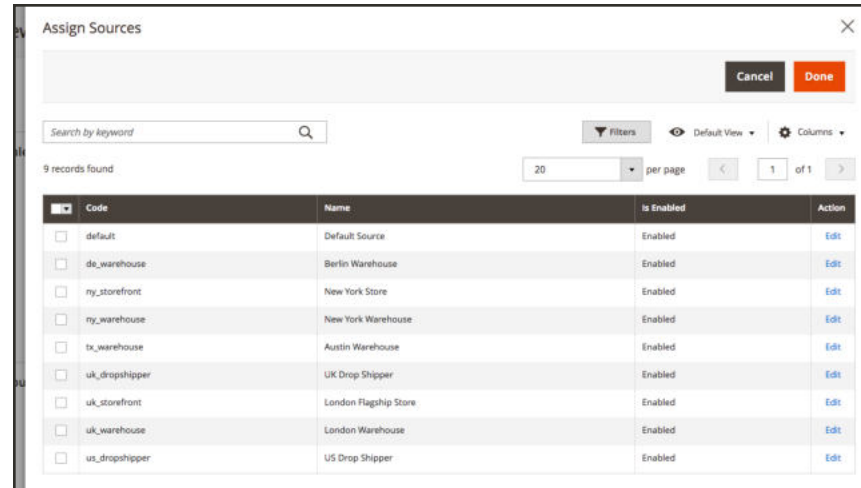
Note that the **Weight** field is not used, because a virtual product is not shipped.
  - b. Accept the default **Visibility** setting, “Catalog, Search.”

#### Assign Sources and Quantities (Inventory Management)

For Multi Source merchants using Inventory Management, scroll down to the Sources section and assign sources and quantities:



1. To add a source, tap **Assign Sources**. The Assign Sources page displays.
2. Browse or search for a source you want to add. Select the checkbox next to the source(s) you want to add for the product.



*Assign sources to the product*

3. Tap **Done** to add the sources.
4. To change settings and quantities per assigned source, do the following:
  - a. Set **Source Item Status** to In Stock.
  - b. Enter an amount update the **Qty** for on-hand stock.
  - c. To set a notification for inventory quantities, do one of the following:

Custom Notify Quantity

Clear the **Notify Quantity Use Default** checkbox and enter an amount in **Notify Quantity**.

Default Notify Quantity

Select the **Notify Quantity Use Default** checkbox. Magento checks and uses the setting in Advanced Inventory or global Store configuration.

Name	Source Status	Source Item Status	Qty *	Notify Qty
Default Source	Enabled	In Stock	0	1
Germany Warehouse	Enabled	In Stock	324	1
London Warehouse	Enabled	In Stock	130	1
UK Drop Shipper	Enabled	In Stock	1003	1

*Update Product Quantities per Source*

5. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

**Choose an existing category:**

- Start typing in the box to find a match.
- Mark the checkbox of the category that is to be assigned.

**Create a new category:**

- Tap **New Category**.
- Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
- Tap **Create Category**.


There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.

**Step 5: Complete the Product Information**


Complete the information in the following sections as needed:

- Content
- Images and Videos
- Search Engine Optimization
- Related Products, Up-Sells, and Cross-Sells
- Customizable Options
- Products in Websites
- Design
- Gift Options

### Step 6: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:

#### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (  ) menu. The store opens in a new browser tab.



*Customer View*

#### Method 2: Save and Close

On the **Save** (  ) menu, choose **Save & Close**.



*Save & Close*

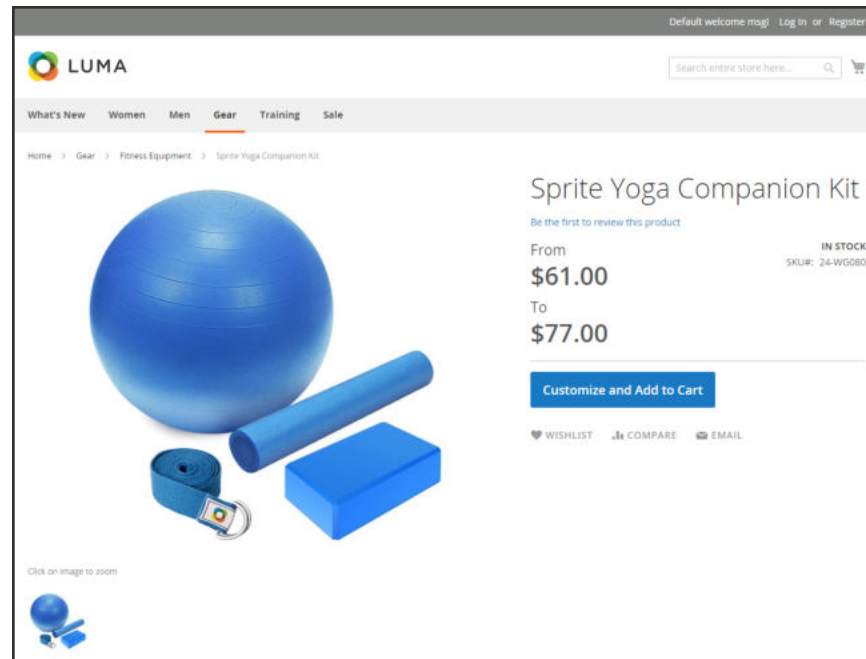
**THINGS TO REMEMBER**

- Virtual products are used for non-tangible products such as services, subscriptions, and warranties.
- Virtual products are much like simple products, but without weight.
- Shipping Options do not appear during checkout unless there is a tangible product in the cart.

## Bundle Product

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

- **Simple Product**
- **Virtual Product**



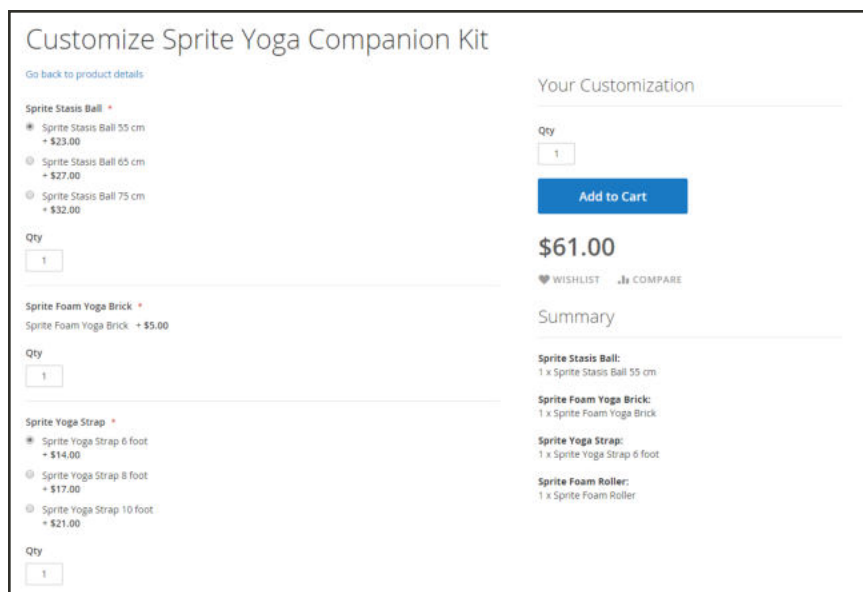
*Bundle Product*

## Customizing the Bundle

The selection of options appears when the customer taps either the Customize and Add to Cart button. Because the products that are included in the bundle vary, the SKU, Price, and Weight can be set to either a dynamic or fixed value.

Minimum Advertised Price (MAP) is not available for Bundle products with dynamic pricing.

If **Instant Purchase** is available, the Instant Purchase button appears below the Add to Cart button for each item in the bundle.




*Customize Bundle*

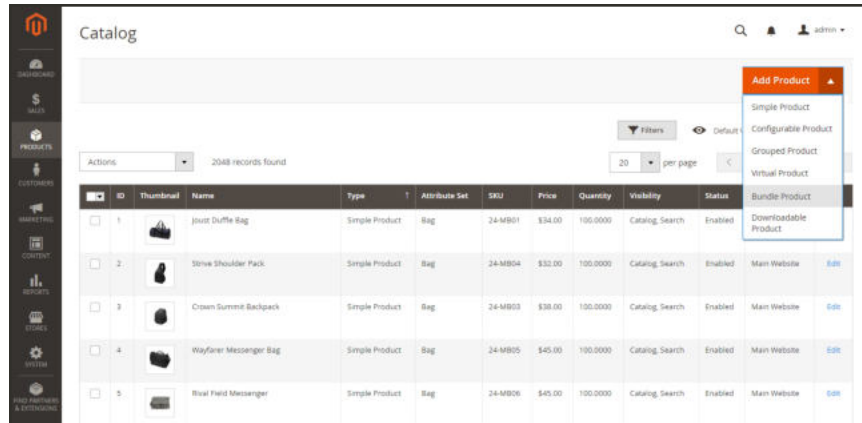
The following instructions take you through the process of creating a bundle product using a **product template**, required fields, and basic settings. Each required field is marked with a red asterisk (\*). When you finish the basics, you can complete the **advanced settings** and **other settings** as needed.

### Process Overview:

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Attribute Set**
- Step 3: **Complete the Required Settings**
- Step 4: **Complete the Basic Settings**
- Step 5: **Add the Bundle Items**
- Step 6: **Complete the Product Information**
- Step 7: **Publish the Product**

### Step 1: Choose the Product Type

1. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (  ) menu, choose **Bundle Product**.



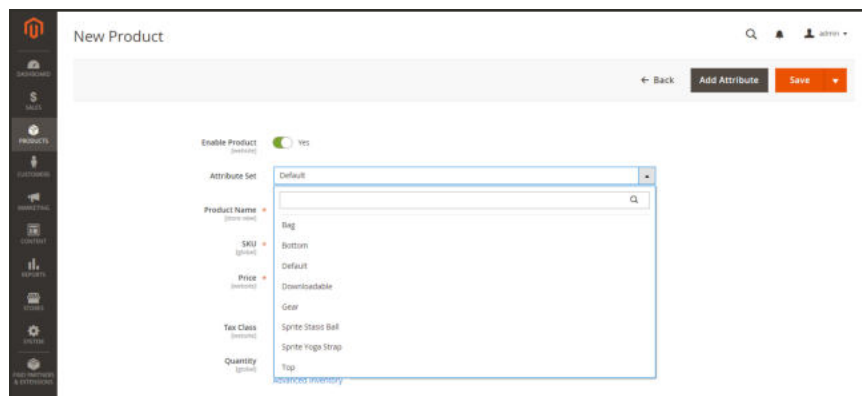
*Add Bundle Product*

### Step 2: Choose the Attribute Set

To choose the **attribute set** that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set,
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.



*Choose Template*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. You can either accept the default **SKU** that is based on the product name, or enter a different value. To determine the type of SKU that is assigned to each bundle item, do the following:
  - A **Dynamic SKU** can be assigned automatically to each bundle item by adding a suffix to the default SKU. By default, Dynamic SKU is set to “Yes.”
  - If you prefer to assign a unique SKU for each bundle item, set **Dynamic SKU** to the “No” (  ) position.

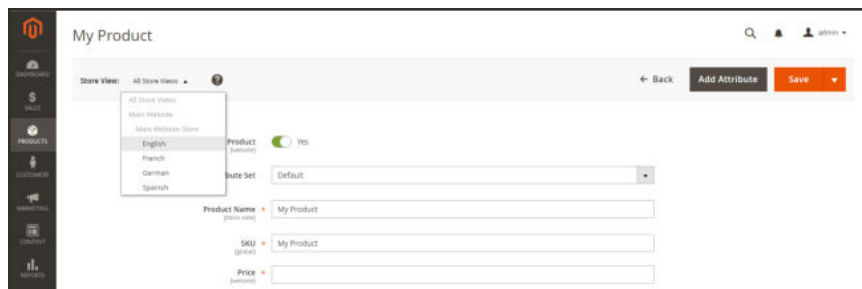


*Dynamic SKU and Price*

3. To determine the price of the bundle, do one of the following:
  - A **Dynamic Price** changes to reflect the options chosen by the customer. By default, Dynamic Price is set to “Yes,” and the Price field is left blank.
  - To charge a fixed price for the bundle, set **Dynamic Price** to the “No.” (  ) position. Then, enter the **Price** that you want to charge for the bundle.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” (  ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*



### Step 4: Complete the Basic Settings

1. If the bundle has Fixed Pricing, set **Tax Class** to one of the following:

- None
- Taxable Goods

If the bundle has Dynamic Pricing, the tax is determined for each bundle item.

2. Take note of the following:

- The **Quantity** is not available because the value is determined for each bundle item.
- The **Stock Status** is set by default to “In Stock.”

3. To determine the weight of the bundle, do one of the following:

- A **Dynamic Weight** changes to reflect the options chosen by the customer. By default, Dynamic Weight is set to “Yes,” and the Weight field is left blank.
- To assign a fixed weight to the bundle, set **Dynamic Weight** to the “No.” (  ) position. Then, enter the **Weight** of the bundle.



*Dynamic Weight*

4. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
5. Accept the default **Visibility** setting, “Catalog, Search.”
6. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

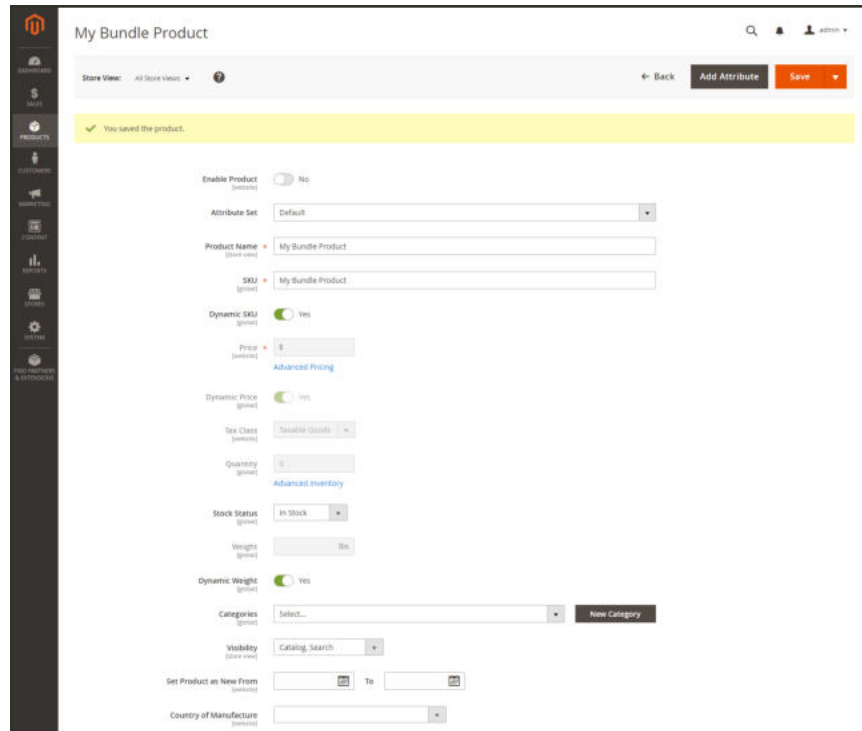
#### Choose an existing category:

- a. Start typing in the box to find a match.
- b. Mark the checkbox of each category that is to be assigned.

#### Create a new category:

- a. Tap **New Category**.
- b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
- c. Tap **Create Category**.

7. Choose the **Country of Manufacture**.



*Bundle Details*

There might be additional attributes that describe the product. The selection varies attribute set, and you can complete them later.

### Step 5: Add the Bundle Items

1. Scroll down to the Bundle Items section. Then, set **Ship Bundle Items** to one of the following:
  - Separately
  - Together



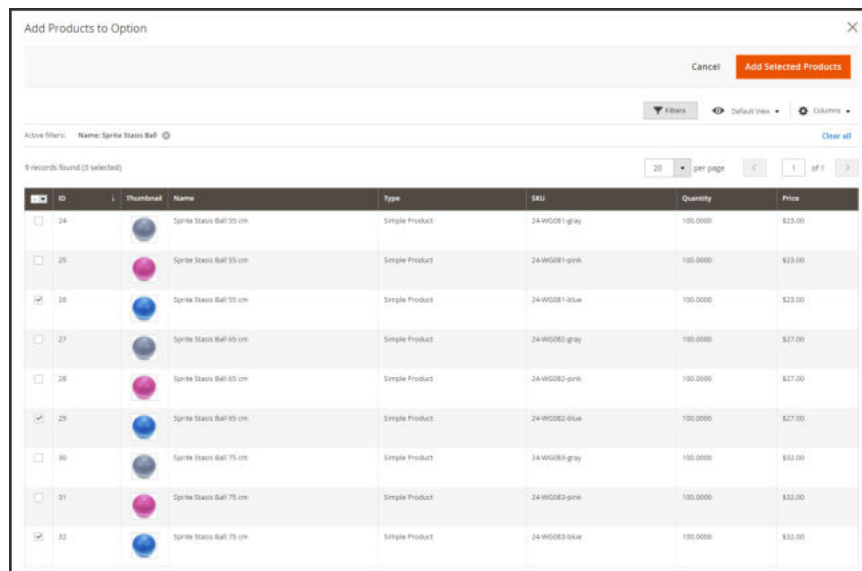
*Bundle Items*

2. Tap **Add Option**, Then, do the following:



*Add Bundle Options*

- a. Enter an **Option Title** to be used field label.
- b. Set **Input Type** to one of the following:
  - Drop-down
  - Radio buttons
  - Checkbox
  - Multiple Select
- c. To make the field a required entry, mark the **Required** checkbox.
- d. Tap **Add Products to Option**. Then, mark the checkbox of each product that you want to include in this option. If there are many products, use the **list filters** and **pagination controls** to find the products you need.
- e. Tap **Add Selected Products**.



*Add Selected Products*

- f. After the items appear in the Options section choose one to be the **Default** selection.
- g. In the **Default Quantity** column, enter the quantity of each item that is to be added to the bundle when a customer chooses the item.

- h. To allow customers to change the quantity of a bundle item, select the **User Defined** option.


The quantity can be a preset or user-defined value. However, do not assign the User Defined property to checkbox or multiple-select input types.

By default, the Default Quantity that is included in a bundle item cannot be changed by the customer. However, the customer can enter the quantity of the item that is to be included in the bundle.

For example, if the Default Quantity of the Sprite Status Ball is set to 2, and the customer orders 4 of that bundle option, the total number of total balls purchased is 8.

Is Default	Name	SKU	Default Quantity	User Defined
<input type="checkbox"/>	Sprite Status Ball 55 cm	24-WG081-blue	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Sprite Status Ball 65 cm	24-WG082-blue	1	<input type="checkbox"/>
<input type="checkbox"/>	Sprite Status Ball 75 cm	24-WG083-blue	1	<input checked="" type="checkbox"/>

*Item Detail*

- Repeat these steps for each item you want to add to the bundle.
- To remove any item from the bundle, tap the **Delete** (  ) icon.
- When complete, tap **Save**.

### Step 6: Complete the Product Information

Scroll down and complete the information in the following sections as needed:

- [Content](#)
- [Images and Videos](#)
- [Search Engine Optimization](#)
- [Related Products, Up-Sells, and Cross-Sells](#)
- [Customizable Options](#)
- [Products in Websites](#)
- [Design](#)
- [Gift Options](#)

### Step 7: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:

#### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (  ) menu. The store opens in a new browser tab.



*Customer View*

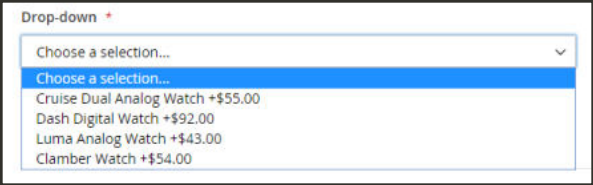

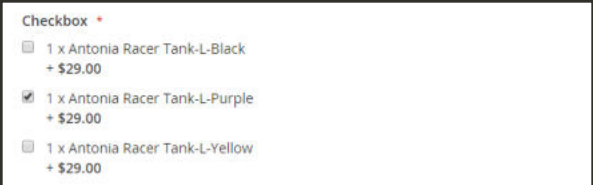

#### Method 2: Save and Close

On the **Save** (  ) menu, choose **Save & Close**.



*Save & Close*

### Input Controls

CONTROL	DESCRIPTION
<p>Drop-down</p>	<p>Displays a drop-down list of options with the product name and price. Only one item can be selected.</p> 
<p>Radio Buttons</p>	<p>Displays a radio button for each option, followed by the product name and price. Only one item can be selected.</p> 
<p>Checkbox</p>	<p>Displays a checkbox for each option, followed by the product name and price. Multiple items can be selected.</p> 
<p>Multiple Select</p>	<p>Displays a list of options with the product name and price. To select multiple items, hold down the Ctrl (or Option) key, and click each item.</p> 

## Field Descriptions

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

## THINGS TO REMEMBER

- Customers can “build their own” bundle product.
- Bundle items can be simple or virtual products without custom options.
- The Price View can be set to a price range or to “As Low As.”
- SKU and Weight can be either “Fixed” or “Dynamic.”
- The quantity can be a preset or user-defined value. However, do not assign the User Defined property to checkbox or multiple-select input types.
- Bundle items can be shipped together or separately.

## Downloadable Product

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

Because the actual download doesn't become available until after the purchase, you can provide samples, such as an excerpt from a book, a clip from an audio file, or a trailer from a video that the customer can try before purchasing the product. The files that you make available for download can be either uploaded to your server, or from a different server.



*Downloadable Product*

Downloadable products can be configured to require that the customer log in to an account to receive the link, or can be sent by email and shared with others. The status of the order before the download becomes available, default values, and other delivery options are set in the configuration. To learn more, see: [Configuring Download Options](#).

The following instructions take you through the process of creating a downloadable product using a [product template](#), required fields, and basic settings. Each required field is marked with a red asterisk (\*). When you finish the basics, you can complete the [advanced settings](#) and [other settings](#) as needed.


Downloadable file names can include letters and numbers. Either a dash or underscore character can be used to represent a space between words. Any invalid characters in the file name are replaced with an underscore.

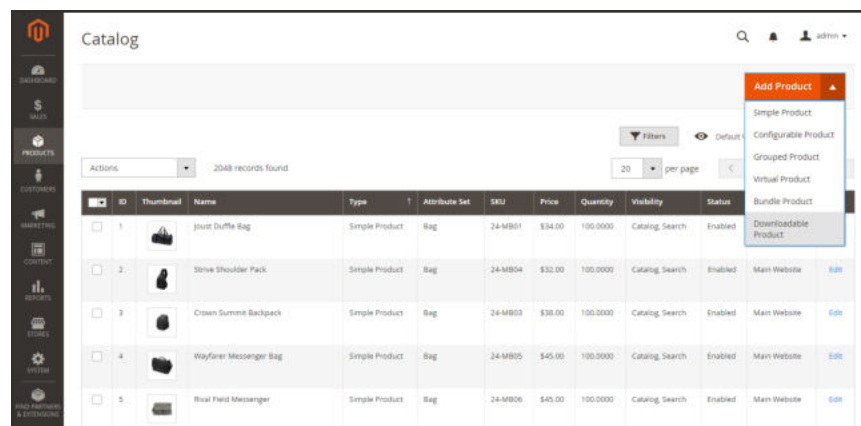


**Process Overview:**

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Attribute Set**
- Step 3: **Complete the Required Settings**
- Step 4: **Complete the Basic Settings**
- Step 5: **Complete the Downloadable Information**
- Step 6: **Complete the Product Information**
- Step 7: **Publish the Product**

**Step 1: Choose the Product Type**

1. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.
2. In the upper-right corner on the **Add Product** (  ) menu, choose **Downloadable Product**.

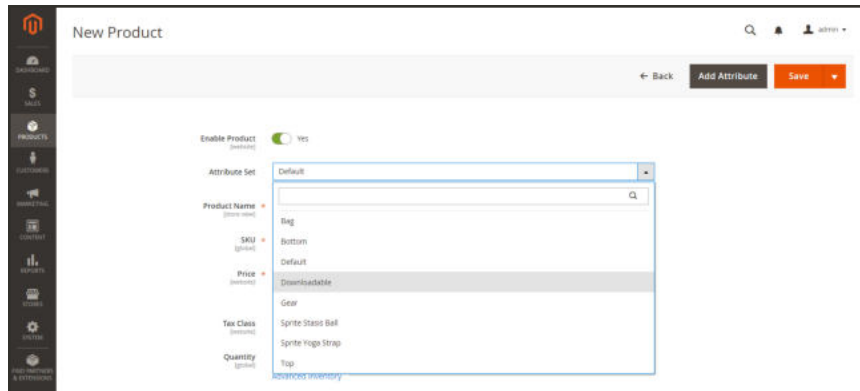
*Add Downloadable Product***Step 2: Choose the Attribute Set**

The sample data includes an **attribute set** called “Downloadable” that has special fields for downloadable products. You can use an existing template, or create another before the product is saved.

To choose the attribute set that is used as a template for the product, do one of the following:

- In the **Search** box, enter the name of the attribute set.
- In the list, choose the “Downloadable” attribute set.

The form is updated to reflect the change.



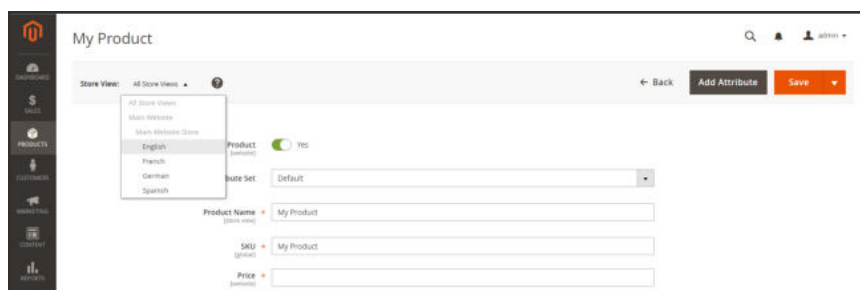
*Choose Attribute Set*

### Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.
3. Enter the product **Price**.
4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” (  ) position.
5. Tap **Save** and continue.

When the product is saved, the **Store View** chooser appears in the upper-left corner.

6. Choose the **Store View** where the product is to be available.



*Choose Store View*

### Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
  - None
  - Taxable Goods
2. Enter the **Quantity** of the product that is currently in stock. For Multi Source merchants with Inventory Management, see the expanded instructions.

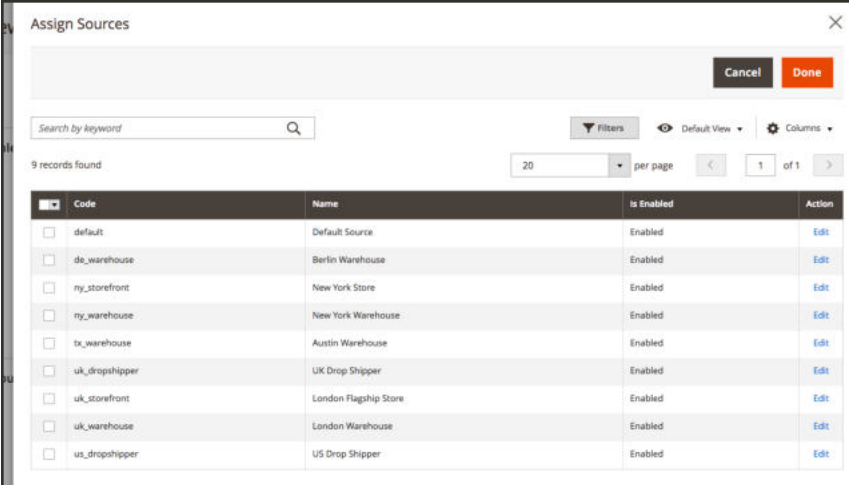
Take note of the following:

- By default, **Stock Status** is set to “Out of Stock.”
- The **Weight** field is not used, because downloadable products are not shipped.

### Assign Sources and Quantities (Inventory Management)

For Multi Source merchants using Inventory Management, scroll down to the Sources section and assign sources and quantities:

1. To add a source, tap **Assign Sources**. The Assign Sources page displays.
2. Browse or search for a source you want to add. Select the checkbox next to the source(s) you want to add for the product.



The screenshot shows the 'Assign Sources' modal window. At the top right are 'Cancel' and 'Done' buttons. Below is a search bar labeled 'Search by keyword' and a 'Filters' button. A table lists 9 records found, with 20 per page and 1 of 1 page. The table has columns for Code, Name, Is Enabled, and Action.

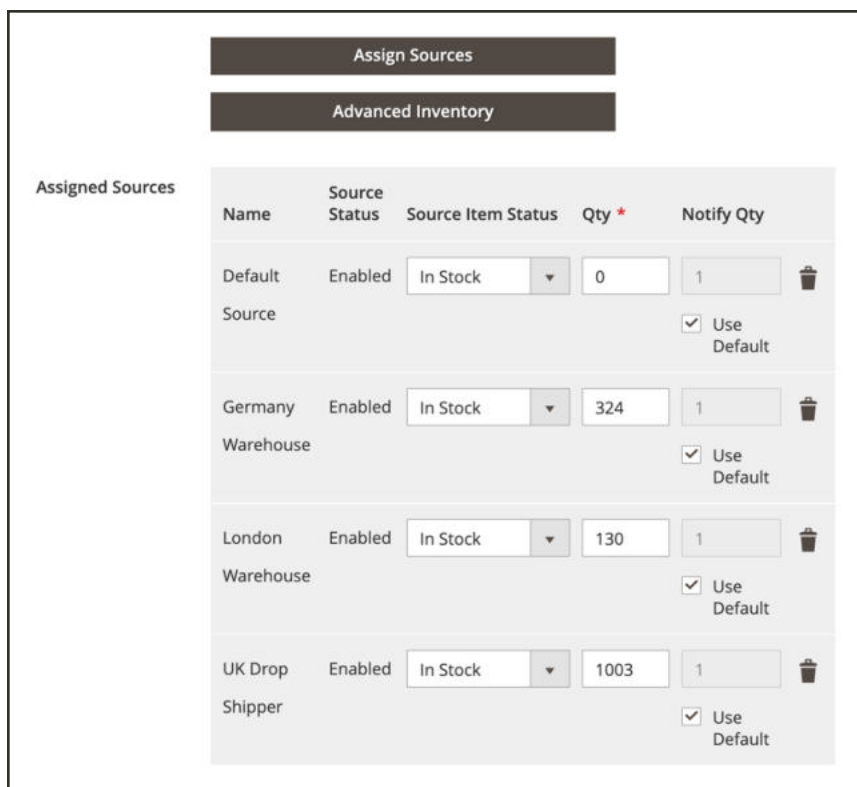
Code	Name	Is Enabled	Action
<input type="checkbox"/> default	Default Source	Enabled	Edit
<input type="checkbox"/> de_warehouse	Berlin Warehouse	Enabled	Edit
<input type="checkbox"/> ny_storefront	New York Store	Enabled	Edit
<input type="checkbox"/> ny_warehouse	New York Warehouse	Enabled	Edit
<input type="checkbox"/> tx_warehouse	Austin Warehouse	Enabled	Edit
<input type="checkbox"/> uk_dropshipper	UK Drop Shipper	Enabled	Edit
<input type="checkbox"/> uk_storefront	London Flagship Store	Enabled	Edit
<input type="checkbox"/> uk_warehouse	London Warehouse	Enabled	Edit
<input type="checkbox"/> us_dropshipper	US Drop Shipper	Enabled	Edit

*Assign sources to the product*

3. Tap **Done** to add the sources.
4. To change settings and quantities per assigned source, do the following:
  - a. Set **Source Item Status** to In Stock.
  - b. Enter an amount update the **Qty** for on-hand stock.

c. To set a notification for inventory quantities, do one of the following:

- Custom Notify Quantity      Clear the **Notify Quantity Use Default** checkbox and enter an amount in **Notify Quantity**.
- Default Notify Quantity      Select the **Notify Quantity Use Default** checkbox. Magento checks and uses the setting in Advanced Inventory or global Store configuration.



*Update Product Quantities per Source*

5. Accept the default **Visibility** setting, “Catalog, Search.”
6. To feature the product in the list of **new products**, mark the **Set Product as New** checkbox.
7. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

**Choose an existing category:**

- a. Start typing in the box to find a match.
- b. Mark the checkbox of each category that is to be assigned.

**Create a new category:**


- a. Tap **New Category**.
  - b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.
  - c. Tap **Create Category**.
8. Set **Format** to one of the following:
- Download
  - DVD

If necessary, you can edit the **attribute** to add more values.

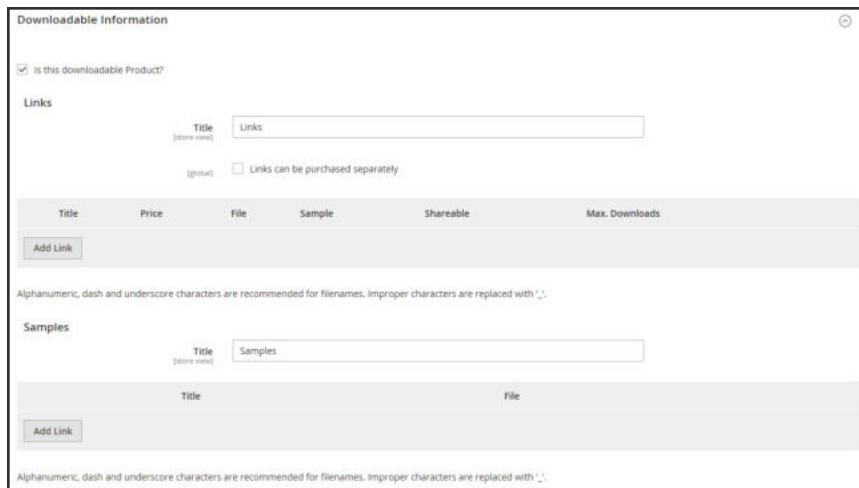
*Product Details*

There might be additional attributes that describe the product. The selection varies attribute set, and you can complete them later.

**Step 5: Complete the Downloadable Information**

1. Scroll down to **Downloadable Information**, and expand  the section. Then, mark the **Is this downloadable product?** checkbox.

The Downloadable Information section has two parts. The first part describes each download link, and the second part describes each sample file. The default value for many of these options can be set in the **configuration**.



*Downloadable Information*

### Part 1: Complete the Links

1. In the Links section, enter the **Title** that you want to use as a heading for the download links.
2. If applicable, mark the **Links can be purchased separately** checkbox.
3. Tap **Add Link**. Then, do the following:

- a. Enter the **Title** and **Price** of the download.
- b. For both **File** and **Sample** files, choose one of the following methods of distribution for the downloads:

**Upload File**                      To upload the the distribution file to the server, choose “Upload File.” Then, browse to the file, and select it for upload.

**URL**                                      To access the distribution file from a URL, choose “URL” Then, enter the full URL to the download file.

- c. Set **Shareable** to one of the following:

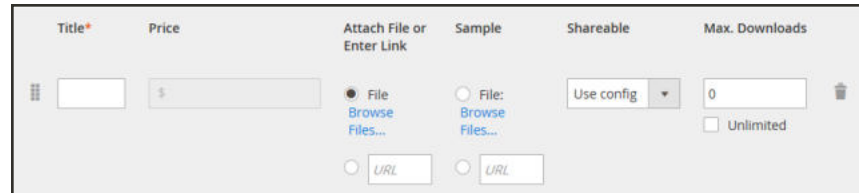
**No**                                      Requires customers to log in to their accounts to access the download link.

**Yes**                                      Sends the link by email, which customers can share with others.

**Use Config**                      Uses the method that is specified in the **Downloadable Product Options** configuration.

- d. Do one of the following:

- To limit downloads per customer, enter the number of **Max. Downloads**.
- To allow unlimited downloads, mark the **Unlimited** checkbox.



The screenshot shows a form titled "Link Detail" with several fields and options:

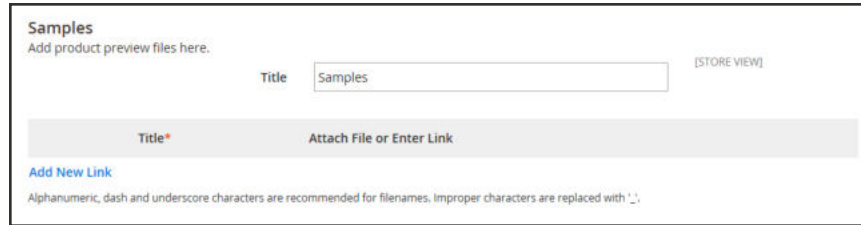
- Title\***: A text input field.
- Price**: A text input field with a dollar sign (\$) on the left.
- Attach File or Enter Link**: A section with two radio buttons: "File" (selected) and "File: Browse Files...". Below the "File" radio button is a "Browse Files..." link. Below the "File:" radio button is another "Browse Files..." link.
- Sample**: A section with two radio buttons: "File: Browse Files..." and "URL". Below the "File:" radio button is a "Browse Files..." link. Below the "URL" radio button is a "URL" input field.
- Shareable**: A dropdown menu with "Use config" selected.
- Max. Downloads**: A text input field with "0" entered, and a trash icon to its right. Below it is an "Unlimited" checkbox.

*Link Detail*

4. To add another link, tap **Add Link**. Then, repeat these steps.


## Part 2: Complete the Samples

1. In the Samples section, enter the **Title** that you want to use as a heading for the samples.
2. To complete the information for each sample, tap **Add Link**.



### *Samples*

3. Complete the link detail as follows:
  - a. Enter the **Title** of the individual sample.
  - b. Choose one of the following distribution methods:
 

Upload File	To upload the the sample distribution file to the server, choose “Upload File.” Then, browse to the file, and select it for upload.
URL	To access the sample distribution file from a URL, choose “URL” Then, enter the full URL to the download file.
  - c. To add another sample, tap **Add Link**, and repeat these steps.
  - d. To change the order of the samples, grab the **Change Order** (  ) icon, and drag the sample to a new position.




## Step 6: Complete the Product Information


Scroll down and complete the information in the following sections as needed:

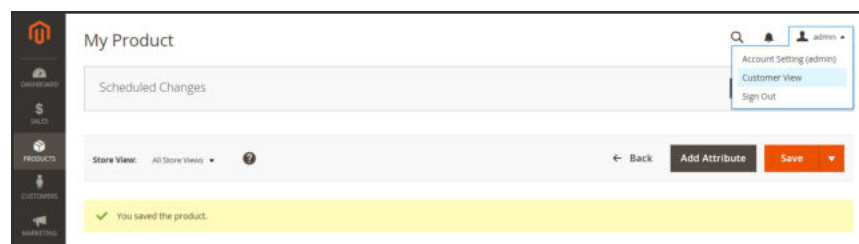
- [Content](#)
- [Images and Videos](#)
- [Search Engine Optimization](#)
- [Related Products, Up-Sells, and Cross-Sells](#)
- [Customizable Options](#)
- [Products in Websites](#)
- [Design](#)
- [Gift Options](#)

## Step 7: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the “Yes” (  ) position.
2. Do one of the following:

### Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (  ) menu. The store opens in a new browser tab.



*Customer View*

### Method 2: Save and Close

On the **Save** (  ) menu, choose **Save & Close**.



*Save & Close*

### THINGS TO REMEMBER

- Downloadable products can be uploaded to the server, or linked to from another server on the Internet.
- You can determine the number of times a customer can download a product.
- Customers who purchase a downloadable product can be required to log in before going through checkout.
- The delivery of a downloadable product can be made when the order is in either a “Pending” or “Invoiced” state.

## Configuring Download Options

The downloadable configuration settings determine the default values and delivery options for downloadable products, and specify if guests can purchase downloads.

### To configure download options:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Downloadable Product Options** section, and do the following:

Downloadable Product Options		
Order Item Status to Enable Downloads <small>[website]</small>	Invoiced	<input checked="" type="checkbox"/> Use system value
Default Maximum Number of Downloads <small>[website]</small>	0	<input checked="" type="checkbox"/> Use system value
Shareable <small>[website]</small>	No	
Default Sample Title <small>[store view]</small>	Samples	<input checked="" type="checkbox"/> Use system value
Default Link Title <small>[store view]</small>	Links	<input checked="" type="checkbox"/> Use system value
Open Links in New Window <small>[website]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Use Content-Disposition <small>[store view]</small>	inline	
Disable Guest Checkout if Cart Contains Downloadable Items <small>[website]</small>	Yes	<input checked="" type="checkbox"/> Use system value

Guest checkout will only work with shareable.

### *Downloadable Product Options*

- To determine the stage in the order workflow when the download becomes available, set **Order Item Status to Enable Downloads** to one of the following:
  - Pending
  - Invoiced
- To set a default limit on the number of downloads that a single customer can make, enter the number in the **Default Maximum Number of Downloads** field.
- Set **Shareable** to one of the following:
 

Yes	Allows customers to email the download link to others.
No	Prevents customers from sharing the download link with others by requiring customers to log in to their accounts to access download links.
- In the **Default Sample Title** field, enter the heading that you want to appear above the selection of samples.



*Sample Title*

- e. In the **Default Link Title** field, enter the default text that you want to use for download links.
  - f. If you want the download link to open in a new browser window, set **Opens Links in New Window** to “Yes.” This setting is used to keep the browser window to your store open.
  - g. To determine how downloadable content is delivered, set **Use Content Disposition** to one of the following:

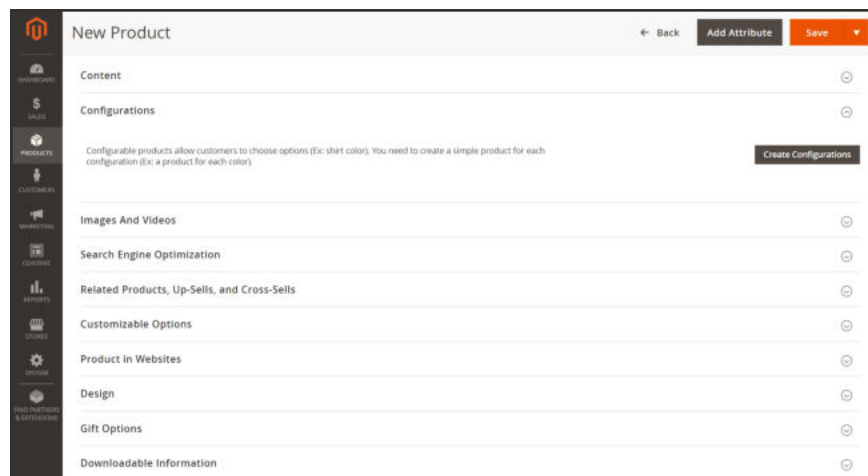
Attachment	Delivers the download link by email as an attachment.
Inline	Delivers the download link as a link on a web page.
  - h. If you want to require that purchasers register for a customer account and log in before purchasing a download, set **Disable Guest Checkout if Cart Contains Downloadable Items** to “Yes.”
4. When complete, tap **Save Config**.



## CHAPTER 13:

# Product Settings

The most frequently used product settings and attributes are located at the top of the page, followed by custom attributes. Any other product settings are in expandable sections at the bottom of the page.

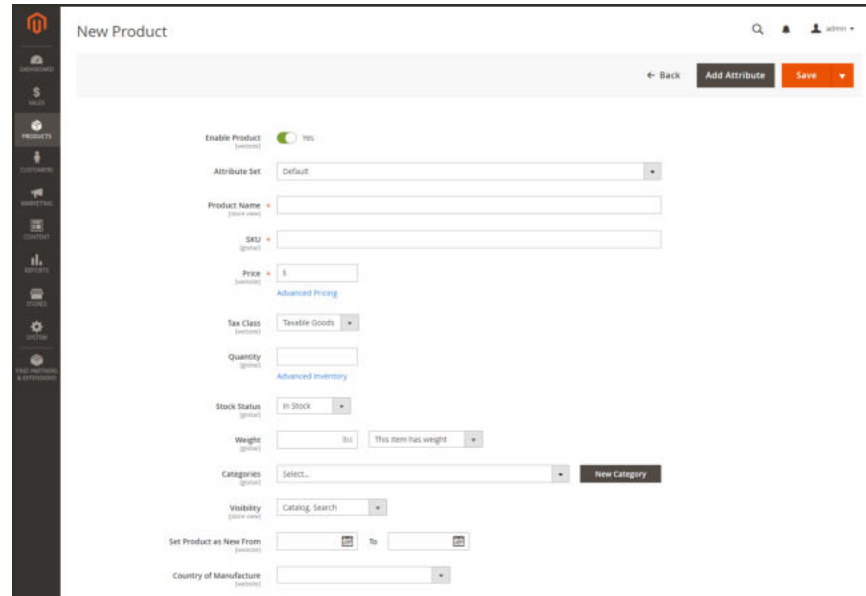


*Product Settings*

## Advanced Product Settings

To access the advanced pricing and inventory settings, click the link below the Price and Quantity fields. To learn more, see:

- [Managing Pricing](#)
- [Managing Inventory](#)



The screenshot displays the 'New Product' form in a Magento admin interface. The form is titled 'New Product' and includes a search bar, a user profile icon, and a 'admin' dropdown menu. Below the title, there are navigation buttons: 'Back', 'Add Attribute', and 'Save'. The form fields are organized into sections:

- Enable Product:** A toggle switch set to 'Yes'.
- Attribute Set:** A dropdown menu set to 'Default'.
- Product Name:** A text input field.
- SKU:** A text input field.
- Price:** A text input field with a '\$' symbol. Below it is a link for 'Advanced Pricing'.
- Tax Class:** A dropdown menu set to 'Taxable Goods'.
- Quantity:** A text input field. Below it is a link for 'Advanced Inventory'.
- Stock Status:** A dropdown menu set to 'In Stock'.
- Weight:** A text input field with a unit dropdown set to 'lbs' and a checkbox for 'This item has weight'.
- Categories:** A dropdown menu set to 'Select...'. To its right is a 'New Category' button.
- Visibility:** A dropdown menu set to 'Catalog, Search'.
- Set Product as New From:** Two text input fields with a 'To' label between them.
- Country of Manufacture:** A dropdown menu.

*Advanced Links*

## Other Product Settings

The remaining product settings are located at the bottom of the page. Some settings are available for all products, and others are available for specific product types. Additional settings might appear when the product is saved for the first time.

### To expand or collapse each section:

Tap the section. The button indicates if it is currently expanded ☺ or collapsed ☹.



*Other Settings*

### General Settings

SECTION	DESCRIPTION
<b>Content</b>	The Content section is used to enter the main product description that appears on the product page. The short description can be used in most RSS feeds, and might also appear in catalog listings, depending on theme. The product description can be formatted using the <b>editor</b> toolbar.
<b>Product Reviews</b>	The Product Reviews section lists all reviews that customers have submitted about the product. The section appears only after a new product has been saved.
<b>Images and Videos</b>	From the Images and Videos section, you can perform basic image management tasks such as upload multiple images, rearrange the order of images, and control how each image is used. For more control over individual images, you can open each image in “detail view.”



SECTION	DESCRIPTION
<b>Search Engine Optimization</b>	The Search Engine Optimization section specifies the <b>URL Key</b> and <b>meta data</b> fields that are used by search engines to index the product. Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in both the meta title and meta description.
<b>Related Products, Up-Sells, Cross-Sells</b>	This section is used to set up simple promotional blocks that present a selection of additional products that might be of interest to the customer.
<b>Product in Websites</b>	The Product in Websites section shows the current scope of the product within the store hierarchy.
<b>Design</b>	The Design settings give you the ability to apply a different theme to the product page, change the column layout, determine where product options appear, and enter custom XML code
<b>Scheduled Design Update</b>	Gives you the ability to apply a different theme to the product page, change the column layout, determine where product options appear, and enter custom XML code
<b>Gift Options</b>	Gift Options can be set at the product level to allow a gift message to be added to the product during checkout.

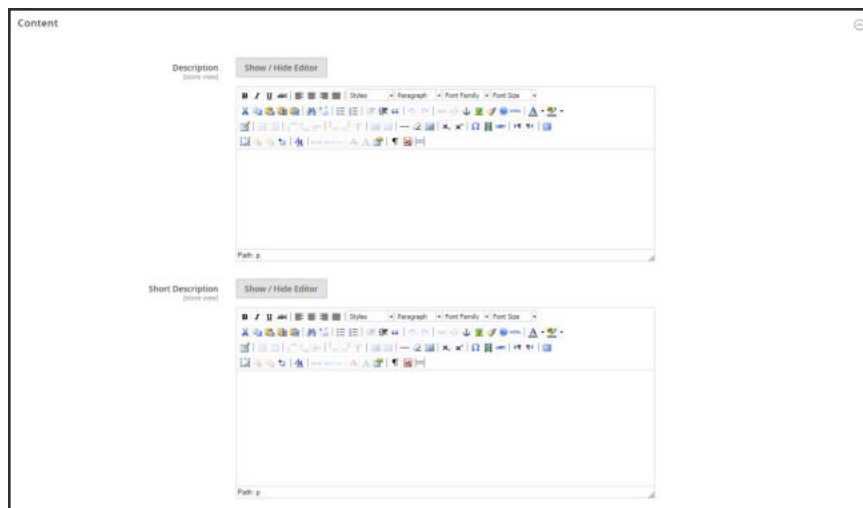
### Product-Specific Settings

SECTION	DESCRIPTION
<b>Configurations</b>	The Configuration section lists any existing variations of the product, and can also be used to generate variations for use with the Configurable product type.
<b>Customizable Options</b>	Customizable options are based on variations of a single SKU, and can be a good solution if your inventory needs are simple.
<b>Downloadable Information</b>	The Downloadable Information section is used to generate the links to downloadable products and samples.
<b>Grouped Products</b>	The Grouped Products section is used to add items to a Grouped product type, and also to edit the current selection of items.
<b>Bundle Items</b>	The Bundle Items section is used to add items to a Bundle product type, and also to edit the current selection of items.

## Content

The Content section is used to enter and edit the main product description that appears on the product page. The short description can be used in most RSS feeds, and might also appear in catalog listings, depending on theme. The product description can be formatted using the [editor](#) toolbar.

Enter only plain ASCII characters into the text box. If pasting text from a word processor, save it first as a plain .TXT file to remove any invisible control characters.



*Content*

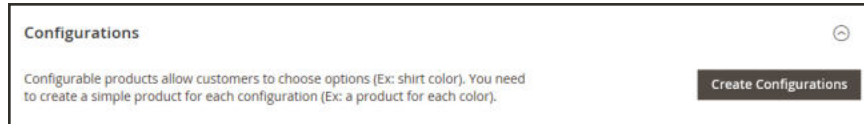
### To enter the product description:

1. Open the product in edit mode. Then, scroll down and expand ☺ the **Content** section.
2. Enter the main product **Description**, and use the [toolbar](#) to format as needed.  
You can drag the lower-right corner to change the height of the text box.
3. Enter a **Short Description** of the product, and format as needed.

To learn more, see: [Using the Editor](#).

# Configurations

The Configurations section lists any existing variations of the product, and can also be used to generate variations for use with the Configurable product type. To learn more, see: [Configurable Product](#).



*Configurations Section*

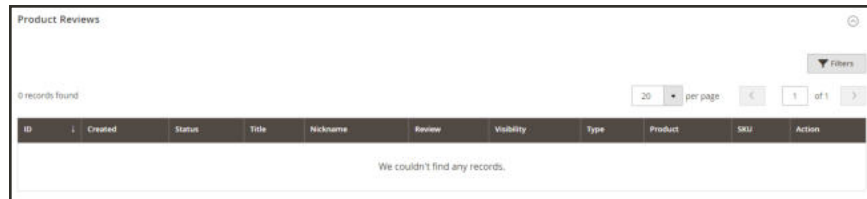
A screenshot of the 'Product Configurations' table in a Magento admin interface. The table lists four variations of a 'Abornnable Hoodie-S-Blue' product. Each row includes an image of the hoodie, the variation name, SKU, price, quantity, weight, status, attributes, and an action menu.

Image	Name	SKU	Price	Quantity	Weight	Status	Attributes	Actions
	Abornnable Hoodie-XS-Blue	MH09-XS-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: XS	Select
	Abornnable Hoodie-S-Blue	MH09-S-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: S	Select
	Abornnable Hoodie-M-Blue	MH09-M-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: M	Select
	Abornnable Hoodie-L-Blue	MH09-L-Blue	\$69.00	100	1.0000	Enabled	Color: Blue, Size: L	Select

*Product Configurations*

## Product Reviews

The Product Reviews section lists all reviews that customers have submitted about the product. The section appears with the other product information only after a new product has been saved for the first time. To learn more, see: [Product Reviews](#).



*Product Reviews*

## Images and Videos

From the Images and Videos section, you can perform basic image management tasks such as upload multiple images, rearrange the order of images, and control how each image is used. For additional control over individual images you can open each image in “detail view.” To learn more, see: [Catalog Images and Video](#).

### To upload an image:

1. Open the product in edit mode.
2. Scroll down and expand ☺ the **Images and Videos** section.



*Images and Videos*

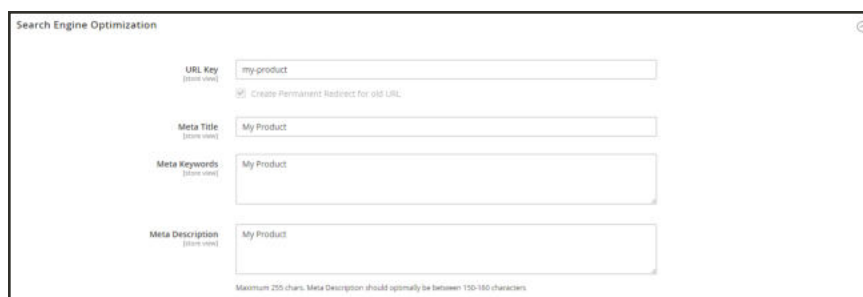
3. If you're ready to add a product image, do one of the following:
  - Drag an image from your desktop, and drop it on the **camera** (📷) tile.
  - Tap the **camera** (📷) tile, and navigate to the image file on your computer. Then, choose the image, and tap **Open**.

A **placeholder** image appears in the catalog until a product image is available.

## Search Engine Optimization

The Search Engine Optimization section specifies the **URL Key** and **meta data** fields that are used by search engines to index the product. Although some search engines ignore meta keywords, others continue to use them. The current **SEO best practice** is to incorporate high-value keywords in both the meta title and meta description.

The default value for each meta data field can be auto-generated based on values specified in the configuration. Each field contains a placeholder that is replaced by an actual value. To learn more, see: [Default Field Values](#).



The screenshot shows the 'Search Engine Optimization' configuration form. It includes the following fields and options:

- URL Key** (text view): Input field containing 'my-product'.
- Create Permanent Redirect for old URL.**
- Meta Title** (text view): Input field containing 'My Product'.
- Meta Keywords** (text view): Input field containing 'My Product'.
- Meta Description** (text view): Input field containing 'My Product'.

At the bottom of the form, there is a note: 'Maximum 255 chars. Meta Description should optimally be between 150-160 characters.'

*Search Engine Optimization*

### To complete the SEO fields:

1. Open the product in edit mode. Then, scroll down and expand ☺ the **Search Engine Optimization** section.
2. The default **URL Key** is based on the product name. You can use the default, or change it as needed. To learn more, see: [Catalog URLs](#).
3. The **Meta Title** is the text that appears at the top of the browser window. You can use the default, which is based on the Product Name, or change it as needed.
4. The **Meta Keywords** are used by some search engines more than others. Enter a few high-value key words to help the product gain more visibility.
5. The **Meta Description** is the text that appears in search results listings. For best results, enter a description that is between 150-160 characters in length.

## Field Descriptions

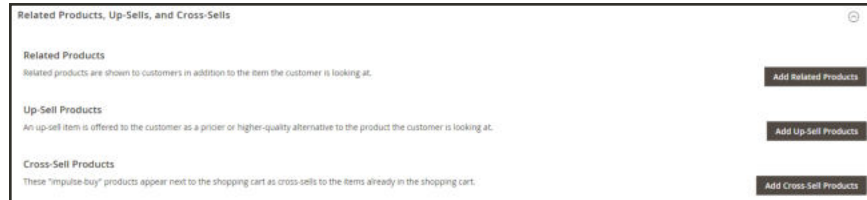
FIELD	SCOPE	DESCRIPTION
URL Key	Store View	<p>Determines the online address of the product. The URL key is added to the base URL of the store, and appears in the address bar of a browser. Magento initially creates a default, “search engine friendly” URL, that is based on the product name.</p> <p>The URL Key should be all lowercase characters, with hyphens instead of spaces. Do not include a suffix such as .html in the URL Key, because it is managed in the configuration.</p>
Meta Title	Store View	<p>The title appears in the title bar and tab of your browser, and is also used as the title on a search engine results page (SERP<sup>1</sup>). The meta title should be unique to the page, and less than 70 characters in length.</p> <p>Auto-generated value: {{name}}</p>
Meta Keywords	Store View	<p>Relevant keywords for the product. Consider using keywords that customers might use to find the product.</p> <p>Auto-generated value: {{name}}</p>
Meta Description	Store View	<p>The meta description provides a brief overview of the page for search results listings. An ideal length is between 150-160 characters in length, with a maximum of 255 characters. Although not visible to the customer, some search engines include the meta description on the search results page.</p> <p>Auto-generated value: {{name}} {{description}}</p>

---

<sup>1</sup>Search Engine Results Page

## Related Products, Up-Sells, and Cross-Sells

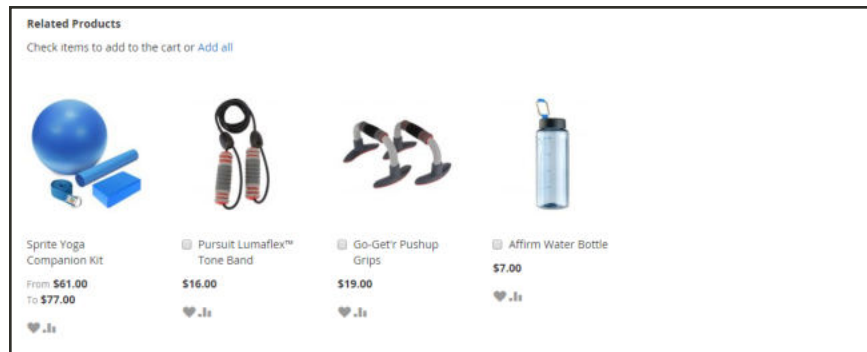
This section is used to set up simple promotional blocks that present a selection of additional products that might be of interest to the customer. To learn more, see: [Product Relationships](#).



*Related Products, Up-Sells, and Cross-Sells*

### Related Products


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

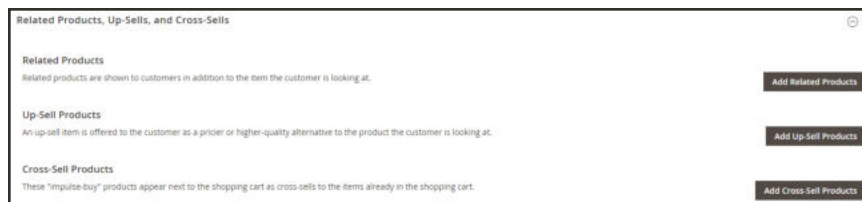


*Related Products*



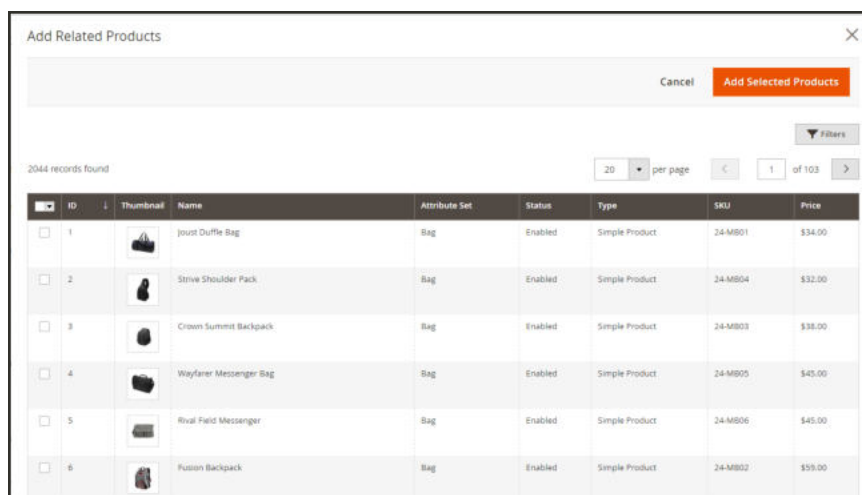
### To set up related products:

1. Open the product in edit mode.
2. Scroll down and expand  the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Related Products**.



*Related Products*

3. Use the **filter controls** to find the products that you want.
4. In the list, mark the checkbox of any product you want to feature as a related product.

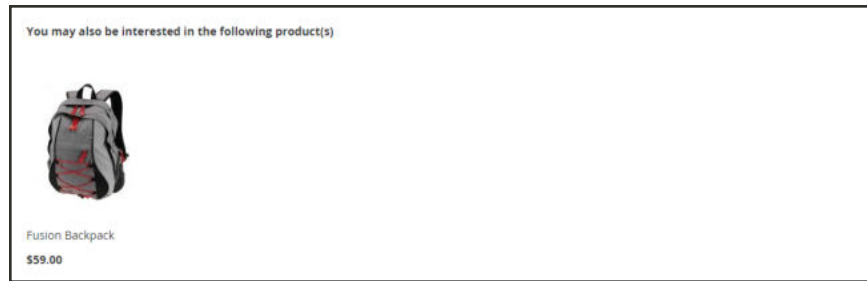


*Related Products*

5. When complete, tap **Add Selected Products**.


## Up-sells

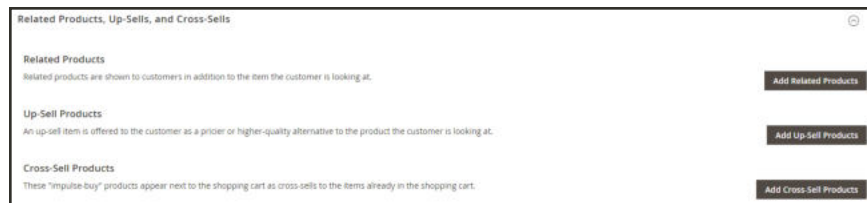
Up-sell products are items that your customer might prefer instead of the product currently considered. An item offered as an up-sell might be of a higher quality, more popular, or have better profit margin. Up-sell products appear on the product page under a heading such as, “You may also be interested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



*Upsell*

### To select up-sell products:

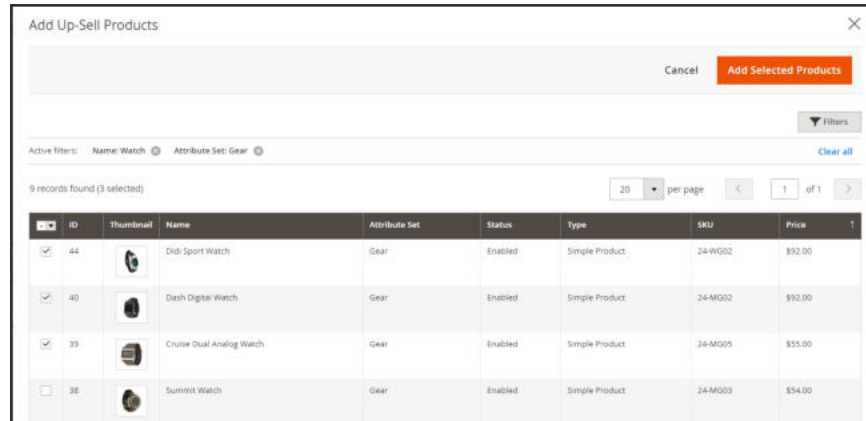
1. Open the product in edit mode.
2. Scroll down and expand  the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Up-Sell Products**.



*Add Upsell Products*

3. Use the **filter controls** to find the products that you want.

- In the list, mark the checkbox of any product you want to feature as an up-sell product.



*Upsell Products*

- When complete, tap **Add Selected Products**.

## Cross-sells


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

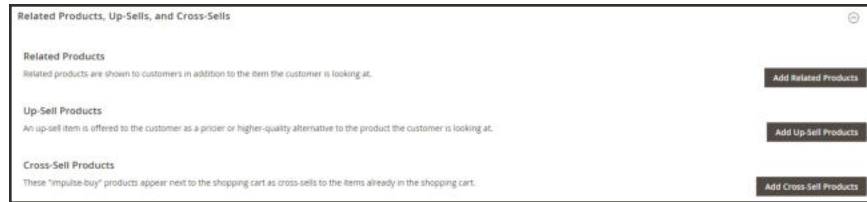
To show or hide cross-sell items per store view, see the Store > Configuration > Sales > **Checkout > Shopping Cart** option called Show Cross-sell Items in the Shopping Cart. You may want to hide cross-sells during specific sales or for A/B testing in a store view.



*Cross-sells in Shopping Cart*

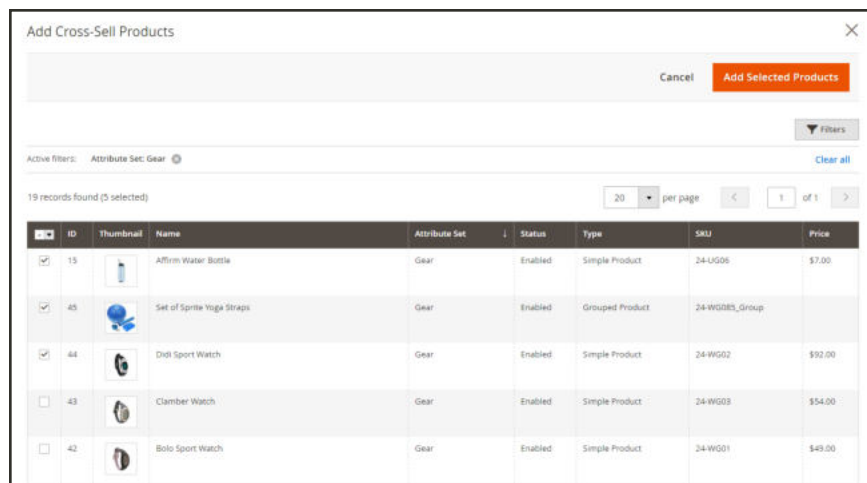
**To select cross-sell products:**

1. Open the product in edit mode.
2. Scroll down and expand  the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Cross-Sell Products**.



*Add Cross-Sell Products*

3. Use the **filter controls** to find the products that you want.
4. In the list, mark the checkbox of any product you want to feature as a cross-sell product.



*Cross-sell Products*

5. When complete, tap **Add Selected Products**.

## Product View Optimization

After using [Google Content Experiments](#) to set up a series of A/B tests, use the Product View Optimization section to paste the snippet of code from Google into the original product that is to be tested.

This section appears only if Google Content Experiments is enabled in the [Google Analytics](#) Google API configuration.

A screenshot of the 'Product View Optimization' section in a Magento admin interface. The section has a title 'Product View Optimization' in the top left and a close button in the top right. Below the title is a label 'Experiment Code' followed by a large, empty text input field. At the bottom of the form, there is a small note: 'Experiment code should be added to the original page only.'

*Product View Optimization*

## Customizable Options

Adding customizable options to a product is an easy way to offer customers a selection of options with a variety of text, selection, and date input types. Customizable options are a good solution if your inventory needs are simple. However, because they are based on variations of a single SKU, they cannot be used to manage stock. If you have multiple products with the same options, you can set up one product, and import the options to the other products.

### To create customizable options:

1. Open the product in edit mode.
2. Scroll down and expand  the **Customizable Options** section. Then, tap **Add Option**.



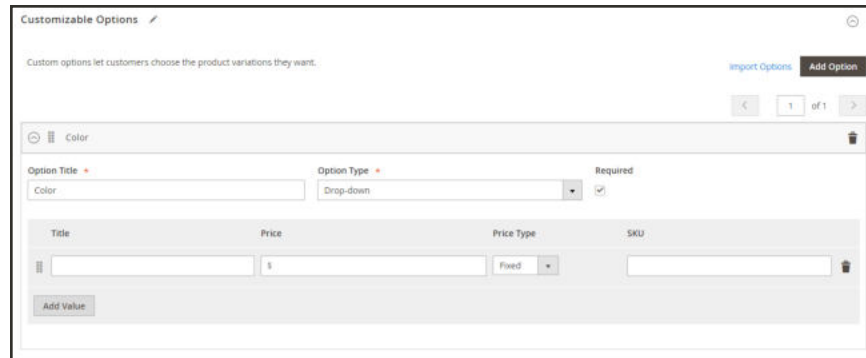
*Customizable Options*

3. In the upper-left corner, tap **New Option**. Then, do the following:
  - a. In the **Option Title** field, enter a name for the option.
  - b. Set the **Option Type** for data entry.
  - c. If the option is not required to purchase the product, clear the **Required** checkbox.




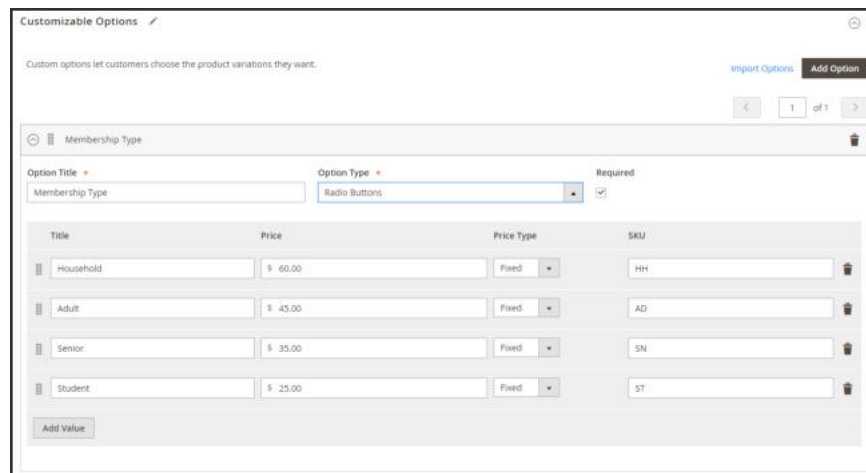
*New Option*

4. Tap **Add New Row**. Then, complete the following:



*Add Value*

- a. In the **Title** field, enter a name for this option.
- b. In the **Price** field, enter any markup or markdown from the base product price that applies to this option.
- c. Set **Price Type** to one of the following:
  - Fixed                      The price of the variation differs from the price of the base product by a fixed monetary amount, such as \$1.
  - Percentage                The price of the variation differs from the price of the base product by a percentage, such as 10%.
- d. Enter a **SKU** for the option. The option SKU is a suffix that is added to the product SKU.
- e. To change the order of the options, tap the **Change Order** icon , and drag the option to a new position in the list.



*Change Order of Options*

- f. Repeat this step for each option to be added.
5. When complete, tap **Save**.

### To import customizable options:

1. In the Customizable Options section, tap **Import Options**.



*Customizable Options*

2. All products with customizable options appear in the grid.
3. In the list, mark the checkbox of the product with the options that you want to import.
4. Tap **Import**.
5. When complete, you can continue to add more custom options, or tap **Save and Close**.

### Input Controls

INPUT TYPE	DESCRIPTION
<b>TEXT</b>	
Field	A single line input field for text.
Area	A multiple-line input box for paragraphs of text. You can use the WYSIWYG Editor to format the text with HTML tags, or type HTML directly into the text area.
<b>FILE</b>	
File	A file to be uploaded by the customer.
<b>SELECT</b>	
Drop-down	A drop-down list of options. Only one item can be selected at a time.
Radio Buttons	A set of options that allows only one to be selected at a time.



**Input Controls (cont.)**

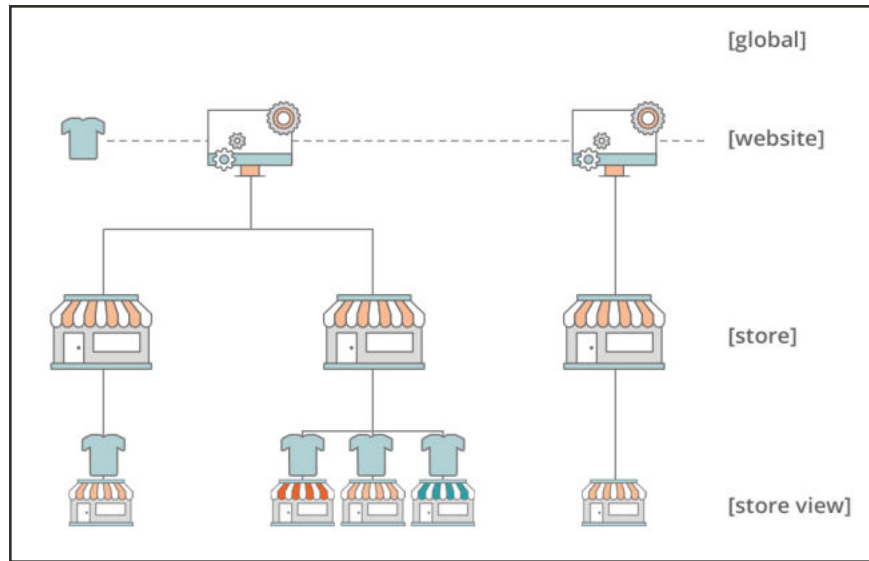
INPUT TYPE	DESCRIPTION
Checkbox	A checkbox is a variation of a yes/no option. If the product has more than one checkbox, multiple selections can be made at the same time.
Multiple Select	A drop-down list of options that accepts multiple selections. To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.

**DATE**

Date	Date	An input field for a date value. The date can be typed directly into the field, selected from a list or calendar. The method of input used and format of the date is determined by the <a href="#">Date &amp; Time Custom Options</a> configuration.
	Date & Time	An input field for date and time values.
	Time	An input field for a time value.

## Product in Websites

The Product in Websites section identifies each website where the product is available, according to the [store hierarchy](#).



*Multisite Installation*

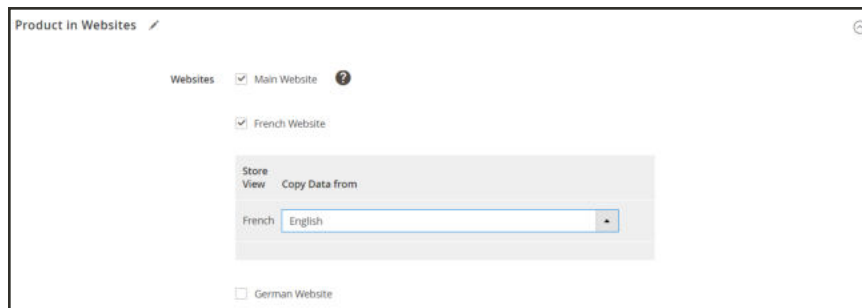
### To copy a product to a different website:

1. Open the product in edit mode.
2. Scroll down and expand the **Product in Websites** section.



*Product in Websites*

3. Mark the checkbox of the website where the product is to be copied  
For an single website installation, the website checkbox is marked by default.
4. Choose the **Store View** where the product is to be copied from.



*Product in Websites*

5. When complete, tap **Save**. Then, do the following:
  - a. When you return to the product record, set the **Store View** chooser to the store view to which the product was copied. When prompted to confirm scope switching, tap **OK**.
  - b. Enter the **Price** of the product for this store view.

Because the scope of the base currency is set to "website," it is possible to sell the product for a different price in each website.

6. When complete, tap **Save**.

## Design

The Design settings give you the ability to apply a different theme to the product page, change the column layout, determine where product options appear, and enter custom XML code.



*Design*

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Theme	Store View	Gives you the ability to apply a different theme to the product. Options: (All available themes)
Display Product Options In	Store View	Determines where the product options appear on the product page. Product Info Column / Block after Info Column
Layout Update XML	Store View	Add XML code to customize the theme.

## Schedule Design Update

The Schedule Design Update section gives you the ability to make temporary changes to the appearance of the product page. You can schedule design changes for a season, promotion, or just to mix things up. Design changes can be scheduled in advance, so they go into effect, or “drip” on schedule.



*Scheduled Design Update*

## Gift Options

Gift Options can be set at the product level to allow a gift message to be included during checkout. To override the default configuration setting, clear the Use Config Settings checkbox.



*Gift Options*

### To set gift options for a single product:

1. Open the product in edit mode.

Scroll down and expand  the **Gift Options** section. Then, do the following:

- a. To override the default setting, clear the **Use Config Settings** checkbox.
  - b. Set **Allow Gift Message** as needed for the product.
2. When complete, tap **Save**.

## Downloadable Information

The Downloadable Information section is used to generate the links to downloadable products and samples. To learn more, see: [Downloadable Product](#).

Downloadable Information

Is this downloadable Product?

**Links**

Title [store view]

[toggle]  Links can be purchased separately

Title	Price	File	Sample	Shareable	Max. Downloads
<input type="button" value="Add Link"/>					

Alphanumeric, dash and underscore characters are recommended for filenames. Improper characters are replaced with '\_'.  
\_

**Samples**

Title [store view]

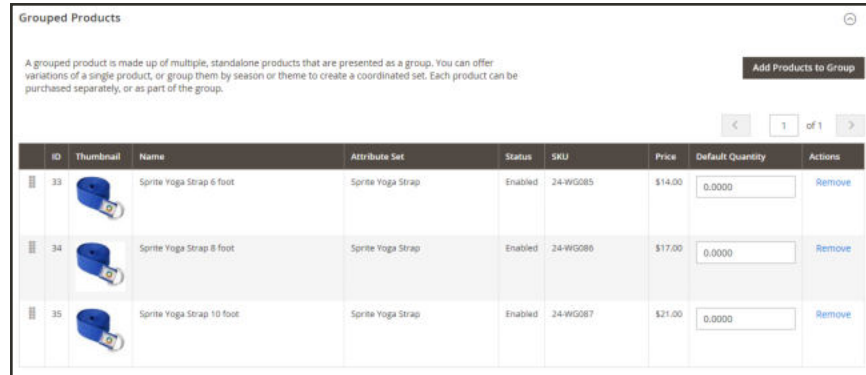
Title	File
<input type="button" value="Add Link"/>	

Alphanumeric, dash and underscore characters are recommended for filenames. Improper characters are replaced with '\_'.  
\_

### *Downloadable Information*

## Grouped Products

The Grouped Products section is used to add individual products to a **Grouped** product. After the products are added, they appear in the section.



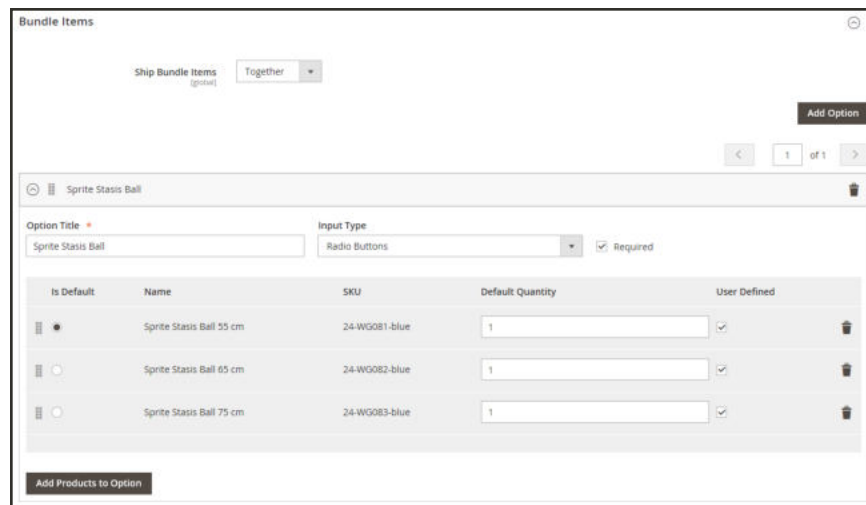
*Grouped Product Items*

## Bundle Items

The Bundle Items section is used to add items to a **Bundle** product type, and also to edit the current selection of items.



*Bundle Items Section*



*Bundle Items*



## CHAPTER 14:

# Managing Price

Magento supports a number of pricing options that you can use for promotions, or to meet the minimum advertised pricing requirements of the manufacturer. Changes to product pricing can be made on schedule, or by price rule that is applied at the product level or in the shopping cart. Topics in this chapter:

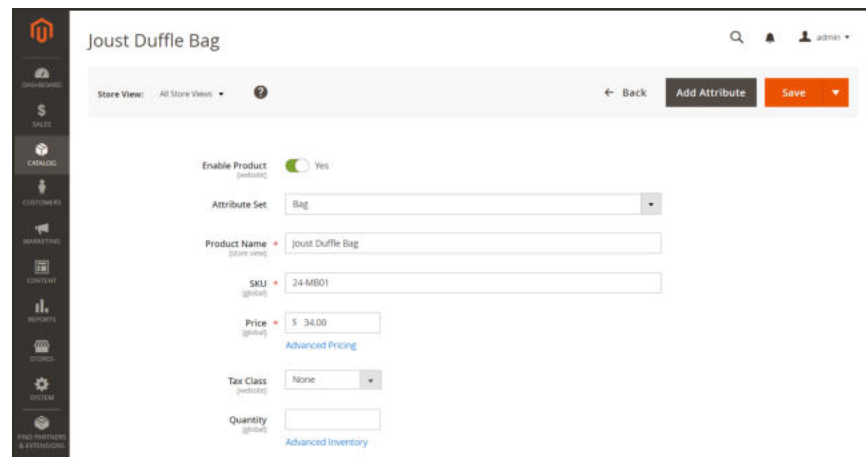
- [Advanced Pricing](#)
- [Group Price](#)
- [Special Price](#)
- [Tier Price](#)
- [Minimum Advertised Price](#)



## Advanced Pricing

The Advanced Pricing settings define the conditions required for special pricing that is available for a specific customer group. Advanced Pricing can be applied to simple, virtual, downloadable, and bundle products. To apply discounted pricing to other product types, use a [catalog price rule](#). To learn more, see: [Price Scope](#).

Advanced pricing data is synchronized with product pages. For example, if you update a tier price quantity, the system updates the value on the product page.



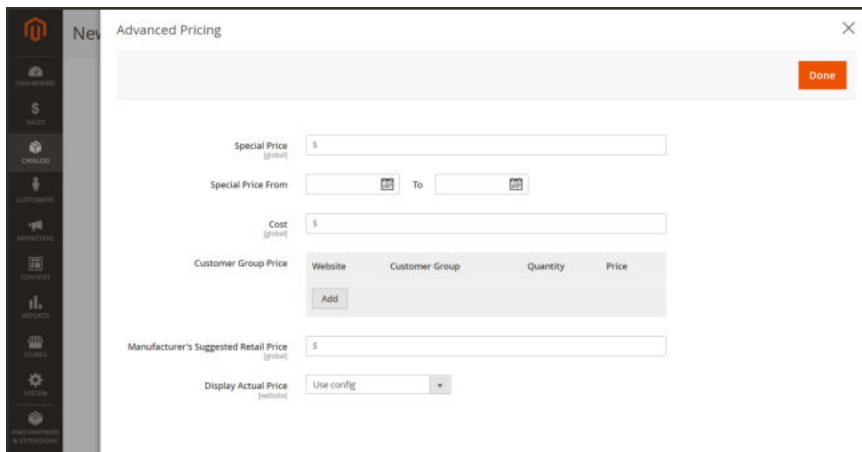
The screenshot displays the 'Joust Duffle Bag' product edit page in the Magento Admin interface. The left sidebar contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, Settings, and Product Attributes & Extensions. The main content area shows the following settings:

- Enable Product:** Yes (checked)
- Attribute Set:** Bag
- Product Name:** Joust Duffle Bag
- SKU:** 24-MB01
- Price:** \$ 34.00, with a link to [Advanced Pricing](#)
- Tax Class:** None
- Quantity:** (empty field), with a link to [Advanced Inventory](#)

*Advanced Pricing*

### To display the Advanced Pricing options:

1. Open the product in edit mode.
2. Under the **Price** field, click **Advanced Pricing**.
3. Follow the instructions for the type of advanced pricing that is needed.
  - [Group Price](#)
  - [Special Price](#)
  - [Tier Price](#)
  - [Minimum Advertised Price](#)


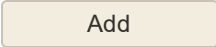


*Advanced Pricing*

### Field Descriptions

FIELD	DESCRIPTION
Special Price	Offers a discounted price during a specified time period. When a special price is available, the retail price is crossed out and the special price appears below in large, bold text.
From	Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.
To	Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.
Cost	The actual cost of the item.
Customer Group Price	Sets up promotional and tier prices for specific customer groups for the current website. Options include: <ul style="list-style-type: none"> <li>Website: Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.</li> <li>Customer Group: (Required) Identifies the customer group that qualifies to receive the discount price. When a value in a group or catalog field is changed, the corresponding custom price row that matched the previous setting is deleted from the shared catalog Options:</li> </ul>

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
	<p>ALL GROUPS</p> <p>Applies the rule to all customer groups.</p> <p>NOT LOGGED IN</p> <p>Applies the rule guests and customers who are not logged in to their accounts.</p>
Quantity	Specifies the quantity that is required to receive a tier price.
Price	<p>(Required) Specifies a fixed or discount product price for members of the customer group, within the specific website. Options: Fixed / Discount</p> <p>Fixed (Default) The discount price is entered as a fixed decimal value. For example, enter “9.99” as the discount price.</p> <p>Discount The discount price is entered as a percentage (%) of the base product price. For example, enter “10” for a 10% discount.</p>
	<p> Deletes the current rule.</p>
	<p> Inserts an additional row for a new rule</p>
Manufacturer’s Suggested Retail Price	The manufacturer’s suggested retail price (MSRP) for the product.
Display Actual Price	<p>Determines where the actual price of the product is visible to the customer. Options:</p> <p>Use Config Uses the current configuration setting for the price display.</p>

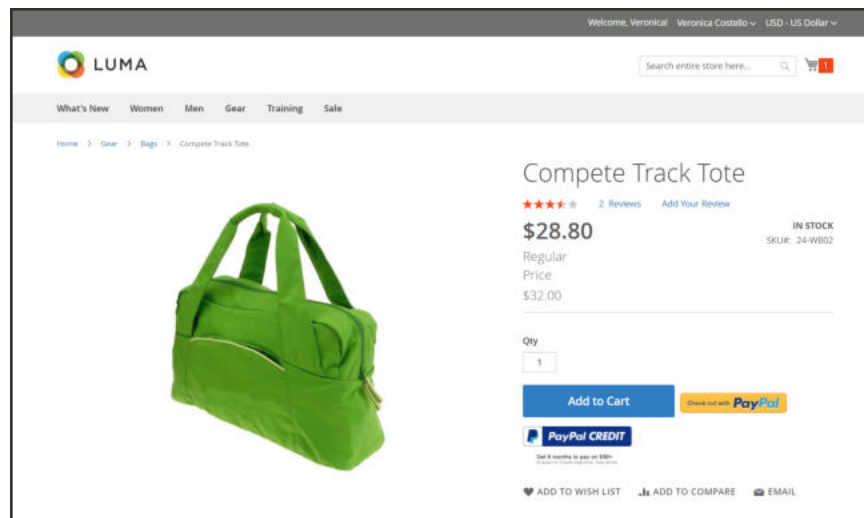
**Field Descriptions (cont.)**

FIELD	DESCRIPTION
On Gesture	Displays the actual product price in a popup, in response to the "Click for price" or "What's this?" link.
In Cart	Displays the actual product price in the shopping cart.
Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is submitted.

## Group Price

A discounted price on any product can be extended to members of a specific customer group, provided they shop while logged in to their accounts. The discounted price appears on the product page with the regular price noted below, and replaces the regular price in the shopping cart.

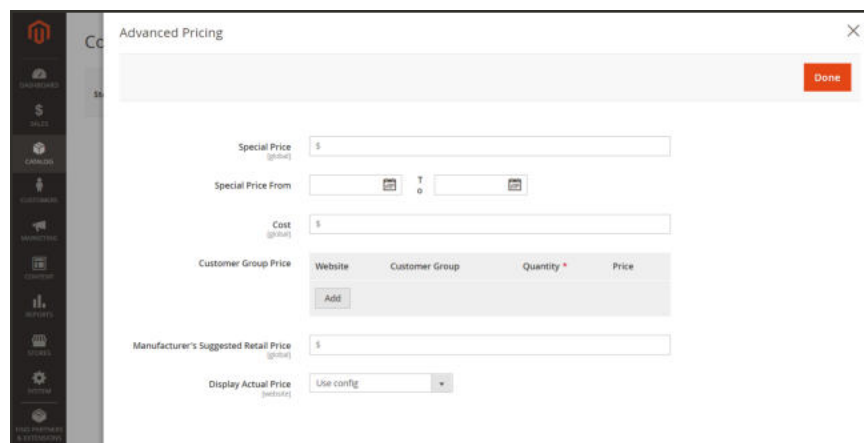
Customer group prices are a component of tier pricing, and are set up in a similar way. The only difference is that customer group prices have a quantity of 1.



*Customer Group Discount*

### To set up a group price:

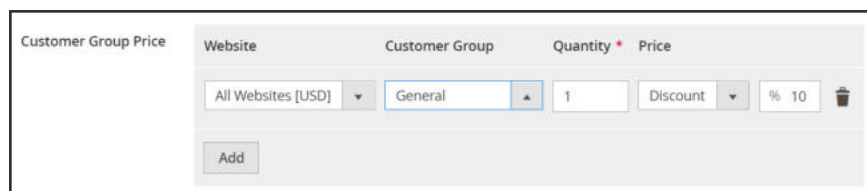
1. Open the product in edit mode. Then below the **Price** field, click **Advanced Pricing**.
2. In the **Customer Group Price** section, tap **Add**. Then, do the following:



*Group Price*

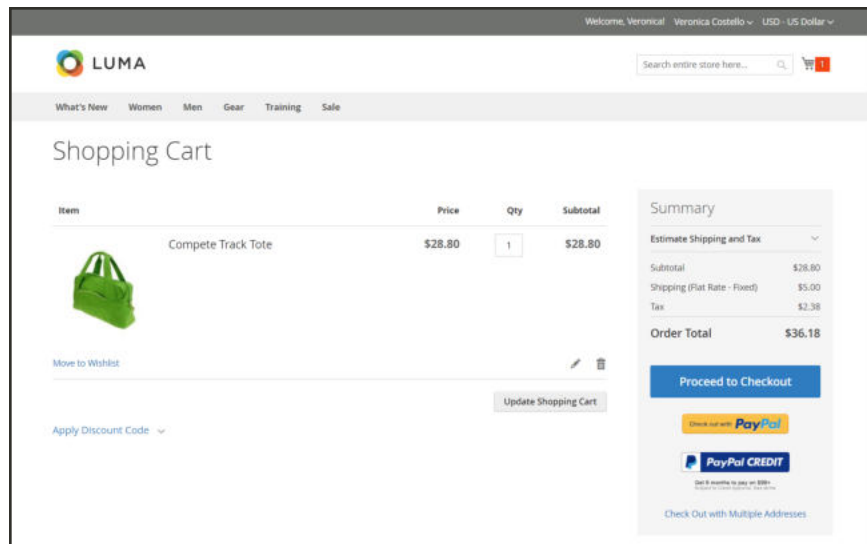
- a. For a multisite installation, choose the **Website** where the group price applies.
- b. Choose the **Customer Group** that is to receive the discount.
- c. Enter a **Quantity** of 1.
- d. Under **Price**, do one of the following:
  - Choose **Fixed**. Then, enter the discounted product price.
  - Choose **Discount**. Then, enter the discounted price as a percentage of the product price.

The following example extends a 10% discount to members of the General customer group who are logged in to their customer accounts.



*10% Discount Customer Group Price*

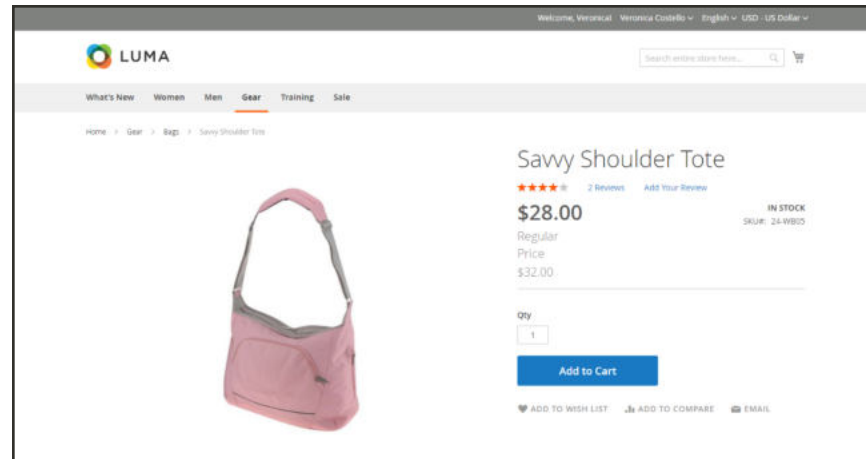
- 3. To add another group price, tap **Add**, and repeat these steps.
- 4. When complete, tap **Done**. Then, tap **Save**.



*Group Price in Shopping Cart*

## Special Price


A special price can be offered for a designated period of time. During the specified time period, the special price appears instead of the regular price, followed by a notation that shows the regular price.



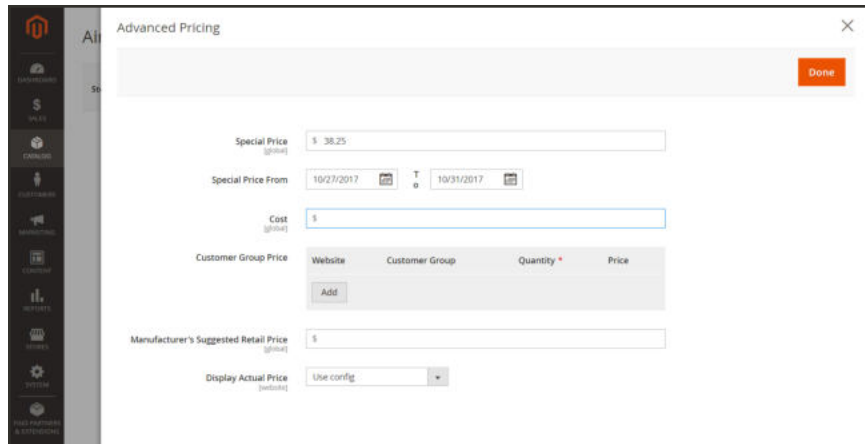
*Special Price on Product Page*

To assign a special price to multiple products, such as multiple variations of a **configurable product**, use the **Actions control+** as described in Method 2.

### Method 1: Apply Special Price to an Individual Product

1. Open the product in edit mode.
  - a. Scroll down to the **Price** field, and click **Advanced Pricing**. Then, enter the amount of the **Special Price**.
  - b. Use the **Calendar** (  ) to choose the **Start Date** and **End Date** for the special price promotion.

The special price goes into effect immediately after midnight at the beginning of the start date (00:01), and continues until just before midnight (23:59) on the day before the end date.



*Special Pricing Settings*

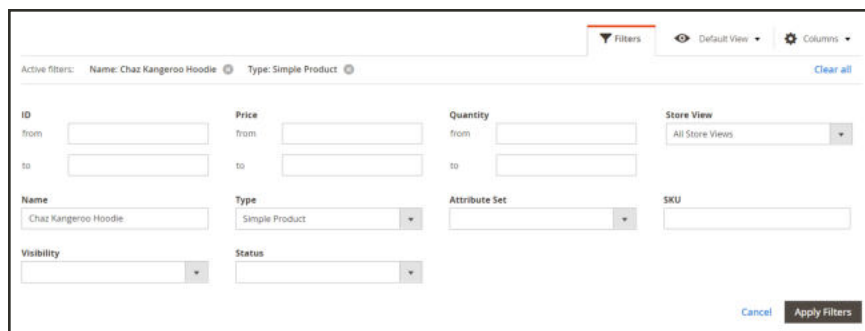
2. When complete, tap **Done**. Then, tap **Save**.

In the storefront, the Special price should appear in both catalog listing, and on the product page.

### Method 2: Apply Special Price to Multiple Products

The following example shows how to assign the same special price to multiple product variations of a configurable product.

1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Tap **Filters**. Then, do the following:
  - a. Enter the **Name** of the configurable product.
  - b. Set **Type** to “Simple Product.”



*Filters*

- c. Tap **Apply Filters**.

The grid lists all simple products that are associated as variations of the configurable product.



ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
52		Chaz Kangeroo Hoodie-XS-Black	Simple Product	Top	MH01-XS-Black	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
53		Chaz Kangeroo Hoodie-XS-Gray	Simple Product	Top	MH01-XS-Gray	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
54		Chaz Kangeroo Hoodie-XS-Orange	Simple Product	Top	MH01-XS-Orange	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
55		Chaz Kangeroo Hoodie-S-Black	Simple Product	Top	MH01-S-Black	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
56		Chaz Kangeroo Hoodie-S-Gray	Simple Product	Top	MH01-S-Gray	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit

*Product Variations*

3. If you want to assign the same special price to all of the products, set the control in the header of the first column to “Select All.” Otherwise, mark the checkbox of each product that you want to include.
4. Set the **Actions** control to “Update attributes.”

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
52		Chaz Kangeroo Hoodie-XS-Black	Simple Product	Top	MH01-XS-Black	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
53		Chaz Kangeroo Hoodie-XS-Gray	Simple Product	Top	MH01-XS-Gray	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
54		Chaz Kangeroo Hoodie-XS-Orange	Simple Product	Top	MH01-XS-Orange	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
55		Chaz Kangeroo Hoodie-S-Black	Simple Product	Top	MH01-S-Black	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit
56		Chaz Kangeroo Hoodie-S-Gray	Simple Product	Top	MH01-S-Gray	\$52.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit

*Update Attributes*

5. Scroll down to the **Special Price** field. Then, do the following:
  - a. Mark the **Change** checkbox below the **Special Price** field. Then, enter the special price that you want to offer.
  - b. Mark the **Change** checkbox below the **Special Price From Date** field. Click the **Calendar** ( ), and choose the first date of the special price promotion.

The special price goes into effect immediately after midnight at the beginning of the start date (00:01), and continues until just before midnight (23:59) on the day before the end date.

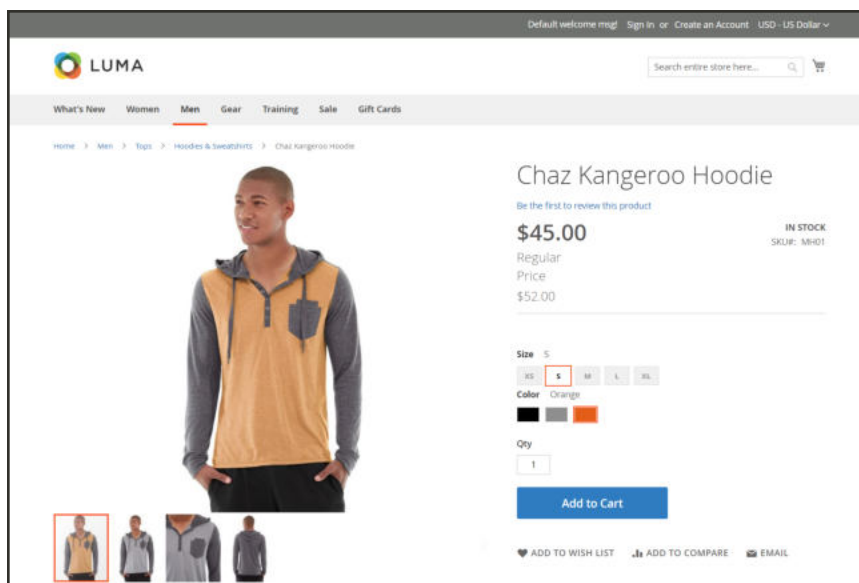
- c. Mark the **Change** checkbox below the **Special Price To Date** field. Click the **Calendar** ( ), and choose the last date of the special price promotion.

*Special Price Fields*

- When complete, click **Save**.

A message indicates how many records were updated with the special price.

The special price becomes available in the store on the date specified, and appears in catalog listings as well as on the product page. For a configurable product, the regular price also appears on the product page when the options are chosen.



*Special Price for Configurable Product*

### Troubleshooting

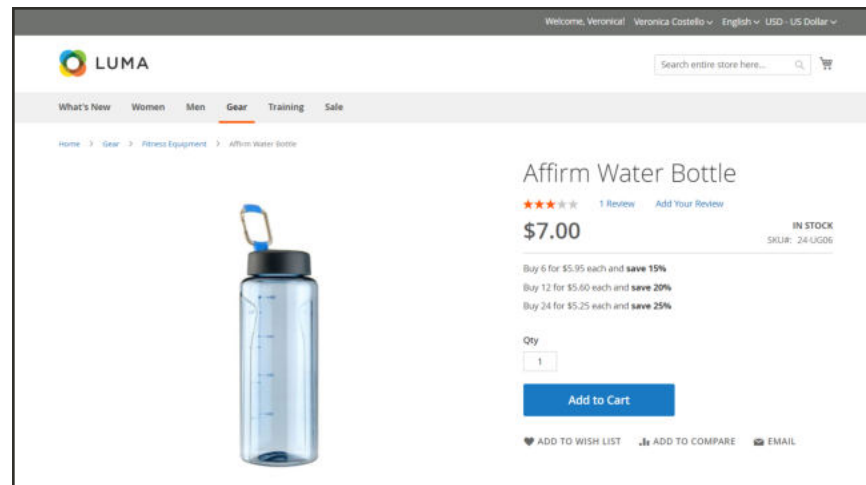
If the special price doesn't appear correctly in the storefront on both the catalog listing and product pages, do the following:

- Clear your browser cache.
- On the Admin sidebar, tap **System**. Then, choose **Cache Management**.
- Tap **Flush Magento Cache**.

## Tier Price

Tier pricing lets you offer a quantity discount from a product listing or product page in the storefront. The discount can be applied to a specific store view or customer group.

If you have many products to update, it is most efficient to import the tier price changes, rather than enter them individually. To learn more, see: [Importing Tier Prices](#).



*Tier Price on Product Page*

The product page calculates the quantity discount and displays a message such as:

Buy 6 for \$5.95 each and save 15%

The prices in the storefront take precedence from the highest to the lowest quantity. Therefore, if you have a tier for the quantity 5 and one for the quantity 10, and a customer adds 5, 6, 7, 8 or 9 items to the shopping cart, the customer receives 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 tier for a quantity of 5, and discounted price for 10 applies.

### To set up a tier price:

1. Open the product in edit mode.
2. Below the **Price** field, click **Advanced Pricing**.
3. In the **Tier Price** section, tap **Add**. If you're creating a tier of several prices, tap **Add** for each additional level, so you can work all tiers at the same time. Each tier in the group has the same website and customer group, but a different quantity and price.
4. For each tier, do the following:
  - a. If your store has multiple websites, choose the **Website** where the tier pricing applies.
  - b. If necessary, choose the **Customer Group** that is to receive the discount.

- c. In the **Qty** field, enter the quantity that must be ordered to receive the discount.
- d. Use one of the following methods to enter the tier prices:

**Method 1: Enter Price as Fixed Amount**

1. Set **Price** to “Fixed”.
2. In the next field, enter the adjusted price for one unit at that tier.

Website	Customer Group	Quantity	Price
All Websites [USD]	General	6	Fixed \$ 5.95
All Websites [USD]	General	12	Fixed \$ 5.60
All Websites [USD]	General	24	Fixed \$ 5.25

*Tier Price as a Fixed Amount*

**Method 2: Enter Price as Percentage**

1. Set **Price** to “Discount”.
2. In the next field, enter the discounted price as a percentage off the base price of the product. For example, for a 15 percent discount, enter the number 15. (The price is saved with two decimal positions, such as “15.00”.)

Website	Customer Group	Quantity	Price
All Websites [USD]	General	25	Discount % 15
All Websites [USD]	General	50	Discount % 20
All Websites [USD]	General	75	Discount % 25

*Tier Price as a Percentage*

5. To add another set of tier pricing for a different website or customer group, repeat the process.
6. When complete, tap **Done**. Then, tap **Save**.

## Minimum Advertised Price

Merchants are sometimes prohibited from displaying a price that is lower than the manufacturer's suggested retail price (MSRP). Magento's Minimum Advertised Price (MAP) gives you the ability to remain in compliance with the manufacturer's requirements while offering your customers a better price. Because requirements differ from one manufacturer to another, you can configure your store to prevent the display of your actual price on pages where it is not allowed to appear according to the terms of the manufacturer.

### MAP Logic

For products with prices that depend on a selected options, (such as custom options, or simple products with their own SKUs and stock management), the following logic is applied, according to the product type and price setting. The actual price is used by order management and customer management tools, and reports.

#### Using MAP with Product Types

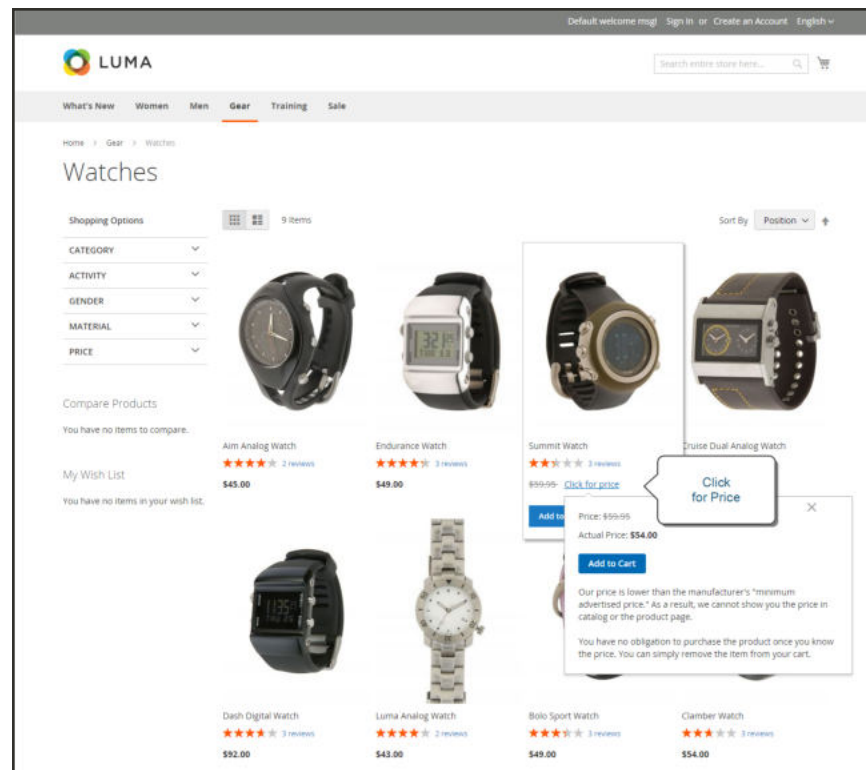
PRODUCT TYPE	DESCRIPTION
Simple, Virtual	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Custom option prices appear normally.
Grouped	The prices of associated simple products do not automatically appear on catalog list and product pages, but are included only according to the Display Actual Price setting.
Configurable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Option prices appear normally.
Bundle (with fixed price)	The actual price does not automatically appear on catalog pages, but is included only according to the Display Actual Price setting. The prices of bundle items appear normally. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">MAP is not available for <b>bundle products</b> with dynamic pricing.</div>
Downloadable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. The price associated with each download link appears normally.

## Using MAP with Price Settings

PRICE SETTING	DESCRIPTION
Main Price	When MAP is applied to the main price, the prices of options, bundle items, and associated products (which add or subtract from the main price) appear normally.
Associated Product Price	If a product does not have a main price, and its price is derived from the associated product prices (such as in a grouped product), the MAP settings of the associated products are applied.
MSRP	If a product in the cart has the Manufacturer's Suggested Retail Price (MSRP) specified, the price is not crossed-out.
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 appears according to the Display Actual Price setting.</p>
Special Price	If the Special price is specified, the special price is displayed according to the Display Actual Price setting.

## Configuring MAP

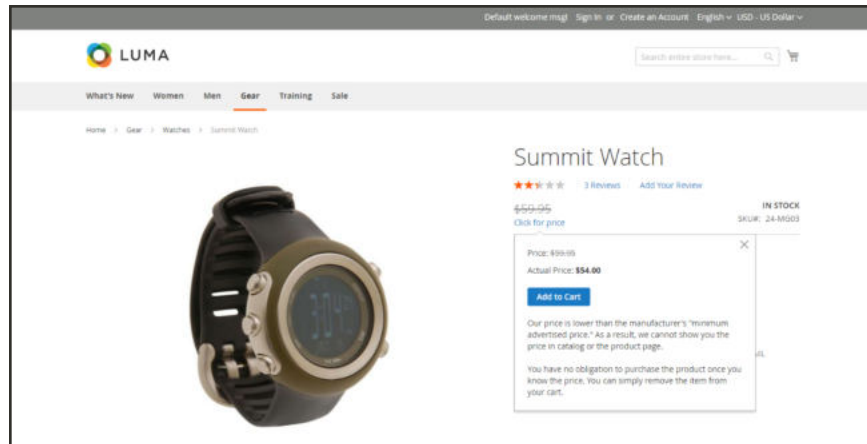
Your store's MAP settings can be applied to all products in your catalog, or configured for specific products. When Minimum Advertised Price is enabled globally, all product prices in the storefront are hidden from view. There are a variety of configuration options that you can use to remain in compliance with the terms of your agreement with the manufacturer, while still offering your customers a better price.



*Actual Price Appears “On Gesture”*

On the global level, you can enable or disable MAP, apply it to all products, define how the actual price is displayed, and edit the text of the related messages and information tips that appear in the store.

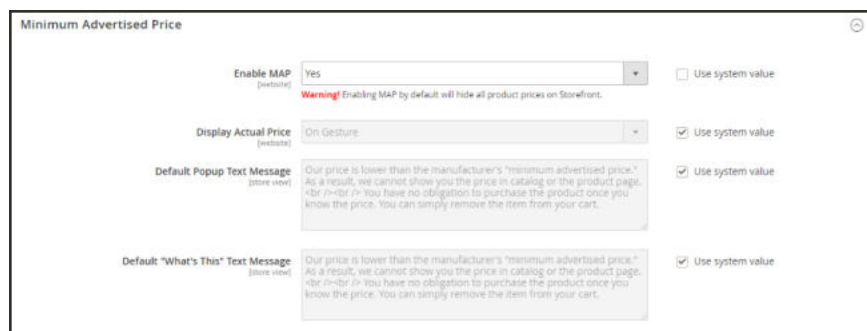
When MAP is enabled, the product-level MAP settings become available. You can apply MAP to an individual product by entering the MSRP, and choosing how you want the actual price to appear in the store. Product-level MAP settings override the global MAP settings.



*Click for Price*

**To configure MAP:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If applicable, in the upper-right corner, set **Store View** to the view where the configuration applies.
3. In the panel on the left under **Sales**, choose **Sales**.
4. Expand ☺ the **Minimum Advertised Price** section.
5. If necessary, set **Enable MAP** to “Yes.” Then, do the following:



*Minimum Advertised Price*



### Method 1: Configure MAP for All Products:

1. To determine when and where you want the actual price to be visible to customers, do the following:
  - a. To change the default value, clear the **Use system value** checkbox.
  - b. Set **Display Actual Price** to one of the following:
    - In Cart
    - Before Order Confirmation
    - On Gesture (on click)
2. Enter the text that you want to appear in the **Default Popup Text Message**.
3. Enter any additional explanation that you want to appear in the **Default “What’s This” Text Message**.
4. When complete, tap **Save Config**.

### Method 2: Configure MAP for a Single Product

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Open the product in **Edit** mode.
3. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**. Then, do the following:

The screenshot shows the 'Advanced Pricing' configuration panel. It contains the following elements:

- Special Price:** A text input field with a currency symbol and a 'Save' button.
- Special Price From:** A range selector with 'From' and 'To' fields and a calendar icon.
- Cost:** A text input field with a currency symbol.
- Tax Price:** A table with columns for Website, Customer Group, Quantity, and Price. An 'Add' button is located below the table.
- Manufacturer's Suggested Retail Price:** A text input field with a currency symbol.
- Display Actual Price:** A dropdown menu currently set to 'On Gesture'.

*Manufacturer's Suggested Retail Price*

- a. Enter the **Manufacturer's Suggested Retail Price**.

In this example, the product price is \$54.00, and the MSRP is 59.95.

- b. Set **Display Actual Price** to one of the following:

Use config	(Default) Applies the MAP configuration setting.
On Gesture	Displays the actual product price in a popup when the customer clicks the "Click for price" or "What's this?" link.
In Cart	Displays the actual product price in the shopping cart.
Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is confirmed.

The Manufacturer's Suggested Retail Price and Display Actual Price fields appear only when **Minimum Advertised Price** is enabled in the configuration.

6. When complete, tap **Done**. Then, tap **Save**.



## CHAPTER 15:

# Managing Inventory

Magento Inventory Management gives you the tools to manage your product inventory. Merchants with a single store to multiple warehouses, stores, drop shippers, and more can use these features to maintain quantities for sales and handle shipments to complete orders. Track your inventory quantities, provide accurate salable stock amounts to customers for all of your websites, and ship according to recommendations based on distance or priority. And configure your preferred product configurations globally (for all stores and products), per source, and per product. These features grow with your business, allowing you to work from a single warehouse or complex shipping networks with a few additional settings.

Inventory Management features are supported by the Community Engineering efforts of the Multi Source Inventory (MSI) project. Learn more about this project and additional developer documentation in [Magento Extensions](#).



### Learning about Inventory Management

Inventory Management provides extensive features to manage product quantities, source locations, configurations, and shipments. Learn more about Single and Multi Source support, workflows, terms, and getting started.



### Getting Started with Inventory Management

Inventory Management provides extensive features to manage product quantities, source locations, configurations, and shipments. Learn more about Single and Multi Source support, workflows, terms, and getting started.



## Configuring Inventory Management

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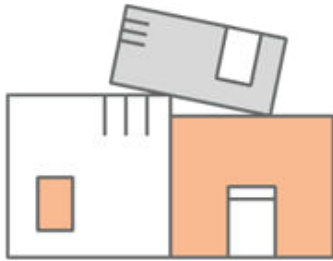
Enable inventory management in Magento. Configure inventory settings at the global to product level for stocks, sources, and products. These settings include thresholds, backorders, and more.



## Managing Sources

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Create and manage locations that store and ship your products. Single Source merchants use the Default Source for all product inventory while Multi Source merchants use additional custom sources.



## Managing Stocks

---

Create and manage stocks to link your sales channels or websites to sources. Stocks provide an aggregated salable quantity of products. Single Source merchants use the Default Stock while Multi Source merchants use additional custom stocks.



## Managing Inventory Quantities

---

Assign sources and add inventory quantities for tracking and selling products across locations. Update amounts per product, through bulk actions, or import and export features.



## Managing Orders and Shipments

---

Generate full or partial shipments to fulfill orders from one or more sources, return stock to sources when issuing credit memos, and manage unshipped orders.

## Learning about Inventory Management

Magento enhances inventory management, enabling you to manage inventory across one or multiple locations and sales channels. These features include terms and concepts that may be new to you and your company. Learn more in the following topics to get a deeper understanding of sources, stocks, shipments, and more!



### About Sources and Stocks

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Manage your inventory from every location in your company and sales channel. Learn about sources and stocks for managing and selling your products.



### About Source Selection Algorithm and Reservations

---

Learn about the heart of Inventory Management. The Source Selection Algorithm and reservations track every available product virtually and on-hand to provide accurate available product amounts for sale and at shipment.



### About Order Status and Reservations

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As you manage orders with shipments, refunds, and cancellations, Magento automatically updates your inventory quantities with reservations. Reservations ensure you do not oversell products across your entire stock.



### About Product Types

---

Inventory Management supports all product types. Options and requirements may differ per product type for sources, stocks, and shipping.

## About Stocks and Sources

Manage your inventory regardless of warehouse location, type of product or service, or sales channel. Fulfill orders and ship products from multiple warehouses, brick-and-mortar stores, distribution centers, and drop shipping to complete orders with a focus on balanced inventory, shipping costs, and more.

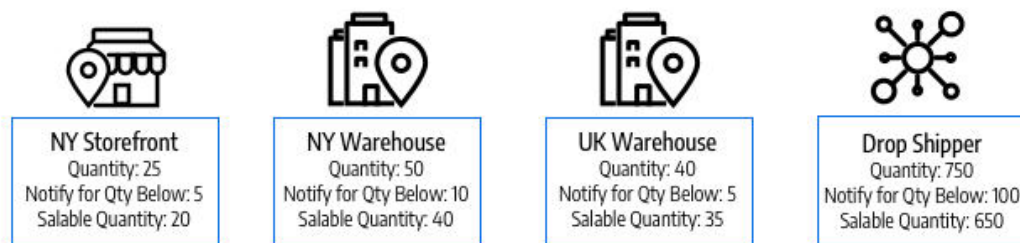
These descriptions include products, sources, and stocks for a bicycle company with multiple shipment locations and websites in the United States and Europe.

### Sources

**Sources** are the physical locations where product inventory is managed and shipped for order fulfillment, or where services are available. These locations can include warehouses, brick-and-mortar stores, distribution centers, and drop shippers. Magento leverages the quantities and salable quantities per stock and manages inventory amounts automatically for managed products and orders. If you have one source, you are considered in Single Source mode. If you have multiple sources, you are considered in Multi Source mode.

A source can have priority in the scope of stock in one warehouse, but not necessarily in all warehouses as the source can be re-used in different stocks. The number of stocks and sources adds to the complexity for determining the best warehouse or store to fulfill an order. For example, you may have a limited number of products available from your brick-and-mortar locations with an extensive inventory in your warehouses, and services in key locations with limited availability.

In this example, the merchant has a mountain bike available for shipment from stores, warehouses, and a drop shipper.



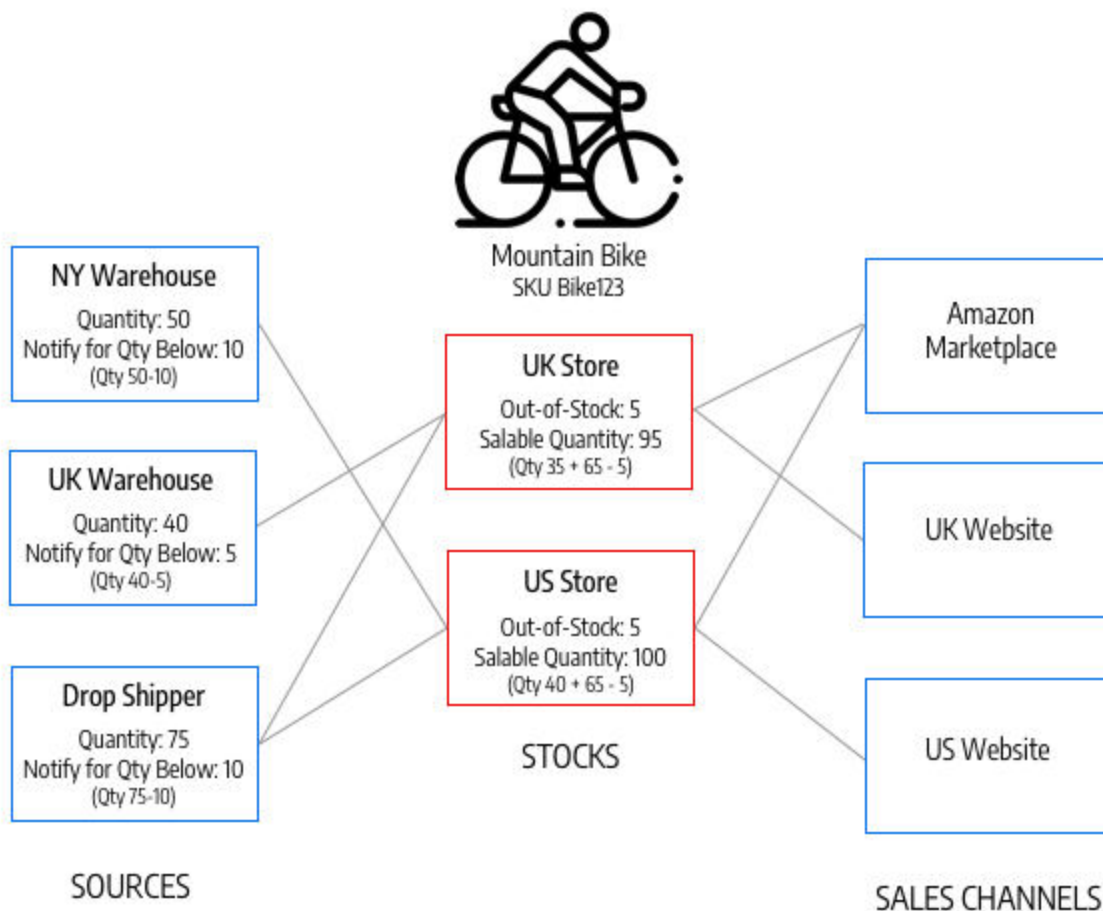
*Example Sources for a Mountain Bike*

### Stocks

**Stocks** represent a virtual, aggregated inventory of products available for sale to your sales channels (currently these are websites). Each stock maps your sales channels with sources for available inventories and salable quantities. Depending on your site configuration, the stock may be assigned to one or more sales channels and sources.

Sales Channels represent entities selling your inventory, including websites, stores views, and so on. Sales Channels can only be associated to one Stock. Each sales channel can only have a single stock assigned to it, and a single stock can be assigned to multiple websites. Through the stock, you can modify the prioritization of sources used when shipping orders and by the [Source Selection Algorithm](#).

You start with a Default Stock assigned with the Default Source and your website, best used by Single Source merchants. Only the Default Source can be assigned to this stock. Multi Source merchants create custom stocks for custom sources and websites as needed.



### Product Quantities

Quantity is the number of products in your active inventory, available for purchase. The quantity of products increases and decreases when you complete shipments or adjust inventory. Adding products to a cart will not affect this amount. The Salable Quantity tracks the availability of the product for a sales channel and also uses this value for determining available stock for purchase. Depending on the number of your sources, you see and manage product quantity for one of the following:



- **Quantity:** For Single Source merchants, the Quantity column and value tracks the amount of on-hand inventory available.
- **Quantity per Source:** For Multi Source merchants, the Quantity per Source column and values track the on-hand inventory available by location. If you add multiple sources, this value replaces the Quantity and lists every source and assigned quantity.

Reservations track stock requests for the entire shopping process: adding products to cart, completing checkout, and managing refunds. For available inventory and stock, reservations reserve inventory amounts per order through the checkout process, subtracted from the salable quantity. Reservations convert to quantity deductions when invoicing and shipping products.

Salable Quantity calculates the virtual inventory of products (or availability), taking into account configured thresholds, reserved or sold amounts, and quantities per source. For each stock, Magento accesses all assigned sources and aggregates associated product quantities. With this base value, it then subtracts all reservation amounts and the Notify for Quantity Below threshold.



*Calculating the Salable Quantity for a Stock*

## Inventory Configurations

Every product, source, and stock includes a number of options to configure for your store at the global, source, stock, and product level. For a full list of these options, see [Configuring Inventory Management](#).

The following are important options to understand for Inventory Management:

- **Notify for Quantity Below** sets an amount to trigger a low stock warning and subtracts from your Salable Quantity. If you enable backorders, this value is not deducted from the Salable Quantity.
- **Backorders** sets if products can be sold beyond a zero inventory, saving orders until restocked. When enabled, we recommend configuring the Out-of-Stock Threshold.
- **Out-of-Stock Threshold** indicates when a product is out of stock and cannot be sold further. The value supports negative and positive amounts. If you enable backorders, we recommend setting this value to a negative amount for the maximum amount of products that can be backordered before the product is truly considered out of stock.

## About Source Selection Algorithm and Reservations

The heart of Inventory Management tracks every available product virtually and on-hand in your warehouses and stores. The Source Selection Algorithm and Reservations systems run in the background, keeping your salable quantities updated, checkout free of collisions, and shipment options recommended.

### Source Selection Algorithm

The Source Selection Algorithm (SSA) analyzes and determines the best match for sources and shipping using the priority order of sources configured in a stock. During order shipment, the algorithm provides a recommended list of sources, available quantities, and amounts to deduct according to the selected algorithm. Inventory Management provides a Priority algorithm and supports extensions for new options.

With multiple source locations, global customers, and carriers with various shipping options and fees, knowing your actual available inventory and finding the best shipment option can be difficult. SSA does the work for you from tracking inventory salable quantities across all sources to calculating and making recommendations for shipments.

**Track Inventory:** Using stocks and sources, the SSA checks the sales channel of incoming product requests and determines available inventory:

- Calculates the aggregated virtual salable quantity of all assigned sources per stock: aggregates Quantity - Out-of-Stock Threshold per source
- Subtracts the Out-of-Stock Threshold amount from salable quantity to protect against overselling
- Reserves inventory quantities on order submission, deducting from in-stock inventory at order processing and shipment
- Supports backorders with enhanced options for negative thresholds

**Manage Shipments:** The algorithm helps when you process and ship orders. You can run the algorithm to get recommendations on the best sources for shipping the product or override the selections to:

- Ship partial shipments, sending only a few products from specific locations and completing the full order at a later date
- Ship the entire order from one source
- Break the shipments across multiple sources in different amounts to keep a balanced stock across all warehouses and stores

SSA is able extensible for third party support and custom algorithms for recommending cost effective shipments.

SSA functions differently for Virtual and Downloadable products, which may not incur shipping costs. In these cases, the system runs the algorithm implicitly when it creates invoices, and always uses the suggested results. You cannot adjust these results for Virtual and Downloadable products.

### Source Priority Algorithm

Custom stocks include an assigned list of sources to sell and ship available product inventory through your storefront. The Source Priority algorithm uses the order of assigned sources in the stock to recommend product deductions per source when invoicing and shipping the order.

When run, the algorithm:

- Works through the configured order of sources at the stock level starting at the top
- Recommends a quantity to ship and source per product based on the order in the list, available quantity, and quantity ordered
- Continues down the list until the order shipment is filled
- Skips disabled sources if found in the list

To configure, assign and order sources to a custom stock. See [Prioritizing Sources for a Stock](#).

The following example details the mapped sources in order, available quantity, and recommended source and amount to deduct and ship. The top source is a Drop Shipper in the United Kingdom with an available quantity of 240.

**Assigned Sources**

	Code	Name
	uk_drop_shipper	Drop Shipper UK
	uk_warehouse	London Warehouse
	de_warehouse	Berlin Warehouse
	uk_store	London Flagship Store

Assigned, prioritized sources for the UK Stock.

The sources display when shipping an order.

Product	SKU	Qty To Ship	Available Sources															
Mountain Bike	bike	3	<table border="1" style="border-collapse: collapse; width: 100%; text-align: center;"> <thead> <tr style="background-color: #333; color: white;"> <th style="width: 30%;">Source</th> <th style="width: 20%;">Qty Available</th> <th style="width: 50%;">Qty To Deduct *</th> </tr> </thead> <tbody> <tr> <td>Drop Shipper UK</td> <td>240</td> <td><input style="width: 50px;" type="text" value="3"/></td> </tr> <tr> <td>London Warehouse</td> <td>230</td> <td><input style="width: 50px;" type="text" value="0"/></td> </tr> <tr> <td>Berlin Warehouse</td> <td>1000</td> <td><input style="width: 50px;" type="text" value="0"/></td> </tr> <tr> <td>London Flagship Store</td> <td>150</td> <td><input style="width: 50px;" type="text" value="0"/></td> </tr> </tbody> </table>	Source	Qty Available	Qty To Deduct *	Drop Shipper UK	240	<input style="width: 50px;" type="text" value="3"/>	London Warehouse	230	<input style="width: 50px;" type="text" value="0"/>	Berlin Warehouse	1000	<input style="width: 50px;" type="text" value="0"/>	London Flagship Store	150	<input style="width: 50px;" type="text" value="0"/>
Source	Qty Available	Qty To Deduct *																
Drop Shipper UK	240	<input style="width: 50px;" type="text" value="3"/>																
London Warehouse	230	<input style="width: 50px;" type="text" value="0"/>																
Berlin Warehouse	1000	<input style="width: 50px;" type="text" value="0"/>																
London Flagship Store	150	<input style="width: 50px;" type="text" value="0"/>																

*Example SSA recommendations for a Mountain Bike*

## Distance Priority Algorithm

The Distance Priority algorithm compares the location of the shipping destination address with source locations to determine the closest source to fulfill shipments. The distance may be determined by physical distance or time spent traveling from one location to another, using imported database locations or Google directions (driving, walking, or bicycling).

You have two options for calculating the distance and time to find the closest source for shipment fulfillment:

- **Google MAP:** Uses [Google Maps Platform](#) services to calculate the distance and time between the shipping destination address and source locations (address and GPS coordinates). This option uses the source's Latitude and Longitude. You must provide a Google API key with [Geocoding API](#) and [Distance Matrix API](#) enabled. This option requires a Google billing plan and may incur charges through Google.
- **Offline Calculation:** Calculates the distance using downloaded and imported geocode data to determine the closest source to the shipping destination address. This option uses the country codes of the shipping address and source. To configure this option, you may require developer assistance to initially download and import geocodes using a command line.

To configure, select configurations and complete additional steps such as the Google API key or downloading shipping data. See [Configuring Distance Priority Algorithm](#).

## Custom Algorithms

Magento supports custom development and extensions to add alternative algorithms to prioritize sources. For example, you can have one priority algorithm based upon geography and another based upon expense of stock or a customer attribute. When the cost of stock changes, your implementation can easily change algorithms to ensure the lowest cost.

## Reservations

Instead of immediately deducting or adding product inventory quantities, reservations hold inventory amounts until orders ship or cancel. Reservations work entirely in the backend to automatically update your salable quantity at the stock level.

### Order reservations

Reservations place holds on inventory quantities deducted from the salable quantity when submitting an order. The reservations are at the stock level, counting against quantities until the order is invoiced and shipped, canceled, etc. When shipping the order, you can use the SSA recommendations or manually enter quantity deductions per source. When shipped, the reservations are automatically cleared and the quantity deducted. The salable quantity recalculates for the stock with an updated quantity and any reservation amounts still in the system.

The following diagram helps define the process of reservations during an order and through to shipment.



A customer submits an order. Magento checks the current inventory salable quantity. If enough inventory is available at the stock level, a reservation enters placing a temporary hold for the product SKU (for that stock) and recalculates the salable quantity.

After invoicing the order, you determine the product amounts to deduct and ship from your sources. The shipment is processed and sent from the selected source(s) to the customer. The quantities automatically deduct from the source inventory quantity and reservations clear. For complete details and examples, see [About Order Status and Reservations](#).

### Updating Reservations

As changes complete in orders and product amounts, Magento automatically enters reservation compensations. You do not need to enter compensations through the Admin or code to update or clear these holds. Reservations are only affected by entered reservations to put a hold on a quantity or to clear a hold amount (compensating the reservations).

Here is how they work:

- **Submitted Order:** When an order submits for an amount of products, a reservation enters for that amount. For example, ordering 5 backpacks from a US website enters a reservation of -5 for that SKU and stock. The salable quantity is reduced by 5.
- **Canceled Order:** When an order is canceled (all or partial), a compensation reservation enters to clear that amount. For example, canceling 3 backpacks enters a +3 reservation for that SKU and stock, clearing the hold. The salable quantity is increased by 3.
- **Shipped Order:** When an order ships (all or partial), a compensation reservation enters to clear that amount. For example, shipping 2 backpacks enters a +2 reservation for that SKU and stock, clearing the hold. The product quantity is directly reduced by 2 for the shipment. The calculated salable quantity is also updated for the reduced stock amount, but no longer affected by the reservation.



All reservations need to be cleared by compensations when orders complete fulfillment, products cancel, credit memos are issued, etc. If compensations do not clear out reservations, you may have quantities held in stasis, not available for sale and never shipping.

**Developer options:** If you want to review reservations, a series of command line options are available. You can only review reservations through a command line interface. Using CLI commands may require developer assistance. See [Inventory Management CLI Reference](#).

If you remove all sources from a product for a stock with pending orders, you may have stuck reservations.

**Important:** Unassigning a source clears all quantity data. Reassigning a source with quantity data can potentially cause issues with pending orders with reservations and affect stock salable quantity counts. Keep in mind, all product quantities in shopping carts and submitted orders have associated reservations. If you unassign the only sources providing those products to the stock, orders cannot be completed and shipped for that sales channel.

**Recommendation:** We recommend processing all pending orders and sending shipments prior to removing sources or transferring all inventory.

## About Order Status and Reservations

Inventory Management supports partial and full invoicing, payments, shipping, and cancellations per order. As you manage an order through processing, invoicing, shipment, and potentially refunds, Magento automatically enters or changes reservations to update the salable

quantity for a stock (or sales channel) and the on-hand inventory quantity per source. You do not have to actively access or enter reservations. Completing actions to fulfill, cancel, or refund an order does it for you.

These reservations always add to your salable quantity, with positive or negative amounts to increase or decrease quantities. These reservations are compensations, updating your on-hand inventory and salable quantities for up-to-date amounts for your store.

For specifics on orders and shipments, see [Managing Orders and Shipments](#).

## Order Management Options

Depending on inventory status and customer requests, you may need to update orders with partial payments and cancellations, partial shipments from multiple sources or for back orders, or credit memos to refund returned products.

### Shipments

After invoicing orders, send partial or full shipments until you fulfill the entire order. Each shipment converts reservation, deducting the amount from the product quantity per source. Reservation compensations enter to update the salable quantity for your stock. If you send partial shipments, each shipment deducts that amount from your product quantity and reservations. Any unshipped product reservations remain in place until they are also shipped at a later time. This keeps your salable amount current, gives you control over product inventory, and supports multiple source shipments and backorders.

### Canceled orders

If a customer cancels their order prior to shipment (partial or in full), a new reservation is entered to return the inventory amount to the salable quantity. The reservations effectively cancel each other out, not deducting the quantity from any sources. Other customers can actively purchase those product quantities through the associated stocks and sales channels.

### Refunded orders

If a customer requests a refund, issue the credit memo for the partial or full product amounts. When you receive the returned products, enter a credit memo to provide the funds and update product amounts. When selecting the **Return to Stock** option, Magento adds quantities back to the product SKUs and sources that shipped the orders and reservation compensations to update salable quantities for the associated stock.

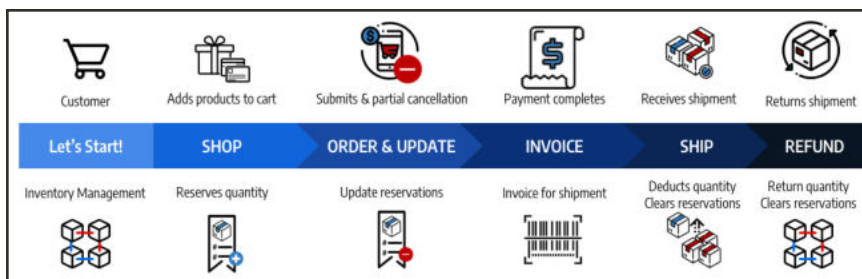
## Order types

Simple orders begin with a shopping cart, continue to payment, and end with a satisfied delivery. In these orders, Inventory Management easily processes reservations against the availability (or salable quantity) in the cart and checkout, and deducts from the on-hand inventory at shipment.



*Process for a Simple Order*

A more complicated order may have partial cancellations, partial shipments, and refunds. In these situations, reservations affect the available inventory to add quantities for cancellations and refunds and decrease quantities when ordered and shipped.



*Process for a Complicated Order*

Availability reservations and inventory changes occur based on the order status.

### Status and Reservations

The following table details order and credit memo status with reservation changes entered by Magento to manage your inventory.

#### Order and Credit Memo Status and Reservations

ORDER STATUS	DESCRIPTION	RESERVATION FOR SALABLE QUANTITY
Open	New and just submitted, no processing	Reservation saved when order is submitted for the stock
Canceled	Canceled in partial or full prior to payment	Reservation compensation entered to return partial or full quantity back to the stock salable quantity
On Hold	Payment and shipping not processed or invoiced	Reservation stays in place
CREDIT MEMO STATUS	DESCRIPTION	RESERVATION FOR SALABLE QUANTITY






**Order and Credit Memo Status and Reservations (cont.)**

ORDER STATUS	DESCRIPTION	RESERVATION FOR SALABLE QUANTITY
Suspected Fraud	Not processed due to fraud	If approved or in review, reservation stays in place
		If declined, reservation stays in place until merchant makes a decision
		If canceled, reservation compensation entered to return full quantity back to the stock salable quantity
Pending	Waiting for payment	Reservation stays in place
Processing	Payment processing, not received	Reservation stays in place
Pending Payment	Payment not received	Reservation stays in place
Payment Review	Payment being reviewed for processing and completion	Reservation stays in place
Complete	Paid and shipped in full	Reservation amount deducts from product quantity for the selected source when invoiced partial or in full
		Reservation compensation entered to update the total salable quantity
Closed	Refunded or archived	If archived, no change in quantities
		If refunded in partial or full, reservation compensation entered and converted to add back product quantities per source and salable quantity per stock
CREDIT MEMO STATUS	DESCRIPTION	RESERVATION FOR SALABLE QUANTITY
Open	The refund is due, not completed	No change in reservations
Refunded	Completed, funds returned	If refunded in partial or full, reservation compensation entered and converted to add back product quantities per source and salable quantity per stock

**Example Complex Order**

Jenny Sanders orders bikes and clothing for her family vacation and fun. She sees some great sales on your Biking Adventures store with stock and sources spanning the United States, Canada, and Europe. Time to put in an order!

She buys two great park bikes for her daughters, a BMX bike for her son, a nice mountain bike for herself, and a modern German cross-country bike for her husband. The store had a sale on cute shirts, so she bought some for the whole family to match. See the list of vacation purchases below, the matching SKUs, and the reservations entered against the stock salable quantities.

		
Order	SKUs	Reservations
2 x Kids Bikes, Girl 1 x Kids Bike, Boy 1 x Mountain Bike, Womens 1 x Mountain Bike, Mens 3 x TShirts, Small 2 x TShirts, Medium	Bike-24-G, \$75.00 Bike-23-B, \$75.00 MtnBike-15-W, \$150 MtnBike-17-M, \$350 BikeFun-Sm-Red, \$9.99 BikeLife-Med-Red, \$15.99	-2 US Stock -1 US Stock -1 US Stock -1 EU Stock -3 Canada Stock -2 Canada Stock

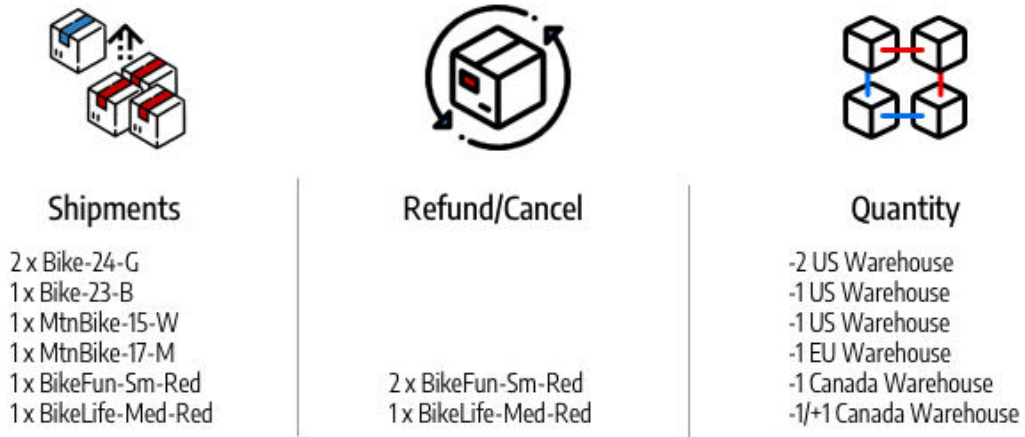
*Example order from Biking Adventures*

She shows her family the great finds, but makes some changes. Before payment completes, she cancels two of the 33-BikeFun SKUs (her daughters did not like them). This is a partial cancellation due to payment pending, so no credit memo needed. To update, Magento adds back to the salable quantity stock for Canada. The order is paid and all products ship, arriving in time for vacation! Magento updates the salable quantity and source quantities for the shipping warehouses for the shipped products.

But her husband didn't quite fit in the shirt. Jenny requests a refund and sends back his shirt. When creating the credit memo, this adds one 54-BikeLife shirt back to the Canada stock and shipping warehouse.

- **Shipped products:** With products purchased and shipped, Magento updates the inventory. Reservation compensations convert to on-hand inventory quantity deductions from the shipped source. The available salable quantity updates for the stock.
- **Canceled products:** By canceling stock, Magento removes the reservation for that product. Reservation compensation is entered to the stock level to add back salable quantities for the partial cancellation of two shirts. This does not affect the inventory quantity at the source level.
- **Credit Memo/Refunded product:** By returning stock, we need to add back to our quantities. When issuing the credit memo, we select to return to stock. Magento adds back

inventory quantity to the shipped source for the product. Reservation compensations enter to clear any remaining reservations. The salable quantity recalculates against the updated quantity.



Example Quantity Updates

## About Product Types

Inventory Management supports inventory and order management for all product types in Magento: simple, configurable, virtual, downloadable, bundle, and grouped. Options and requirements may differ per product type for sources, stocks, and shipping.

- Single Source merchants create and update product settings and quantities without requiring additional updates. All created and newly imported products automatically assign to the Default Source and Default Stock, immediately available to customers if enabled and In-Stock.
- Multi Source merchants assign sources, quantities per source, and settings during or after product creation. Magento assigns all newly imported products to the Default Source, requiring additional edits to assign sources and quantities.

### Supported Products

PRODUCT TYPE	SINGLE SOURCE	MULTI SOURCE	SOURCE AND STOCK	SHIPPING AND SOURCE SELECTION ALGORITHM
Simple	Yes	Yes	Default Source Default Stock	Supports SSA recommendations and overrides at shipping

**Supported Products (cont.)**

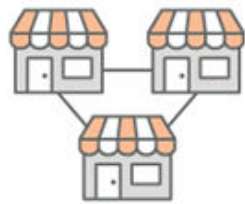
PRODUCT TYPE	SINGLE SOURCE	MULTI SOURCE	SOURCE AND STOCK	SHIPPING AND SOURCE SELECTION ALGORITHM
			custom source/stock	
<b>Configurable</b>	Yes	Yes	Default Source Default Stock custom source/stock	Supports SSA recommendations and overrides at shipping
<b>Virtual</b>	Yes	Yes	Default Source Default Stock custom source/stock	Always uses the SSA recommendation. The system runs the algorithm implicitly when it creates invoices, and always uses the suggested results.  You cannot adjust these results.
<b>Downloadable</b>	Yes	Yes	Default Source Default Stock custom source/stock	Always uses the SSA recommendation. The system runs the algorithm implicitly when it creates invoices, and always uses the suggested results.  You cannot adjust these results.
<b>Bundle</b>	Yes	No	Default Source Default Stock	Supports SSA recommendations and overrides at

**Supported Products (cont.)**

PRODUCT TYPE	SINGLE SOURCE	MULTI SOURCE	SOURCE AND STOCK	SHIPPING AND SOURCE SELECTION ALGORITHM
<b>Grouped</b>	Yes	Yes	Default Source Default Stock custom source/stock	shipping Supports SSA recommendations and overrides at shipping

## Getting Started with Inventory Management

Quickly set up your sources, stocks, and inventory quantities as a Single or Multi Source merchant. Learn more about planning and structuring your inventory, changes in Inventory Management, and much more. Each section provides links to more information and instructions.



### Configuring Single and Multi Merchants

Learn more about the kind of merchant you are! We provide a quick list of steps to get configured and ready to sell and ship from one or multiple locations.



### Expanding and Restructuring Inventory

As your business changes, you may need to expand and add sources or cut back on locations and transfer inventory.



## Migrating and Upgrading

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This information provides details for existing Magento users upgrading or migrating to Inventory Management. These features include new configurations, options, and settings added to existing catalogs. This topic also covers third part support, Magento Order Management, and extension information.

## Configuring Single and Multi Source Merchants

Magento supports inventory management for all sizes of businesses, including a single store with one website to an international network of websites, stores, warehouses, and drop shippers. All merchants using Magento fall into two types based on the number of locations, or sources, in your business.

- Single Source merchants ship products from one location. You are considered a Single Source merchant/mode until you start adding custom sources and stocks to your installation.
- Multi Source merchants ship products from more than one location such as brick-and-mortar stores, warehouses, drop shippers, and distribution centers. After adding custom sources per location, you automatically become a Multi Source merchant or mode.

### Single Source Merchants

Single source merchants have a single location that manages on-hand inventory and fulfills orders. Typically, you have multiple websites (or sales channels) selling products from the same catalog, inventory, and location.

For example, you have one website or a multisite implementation with sites for United States, Germany, France, and Brazil all pulling products from one large warehouse. This single source manages all inventory quantities, shipments, and returns regardless of which sales channel receives the order.

To get started, we recommend:

- Configure [global and product settings](#) for your store's inventory as needed.
- Update the [Default Source](#) with information for your single inventory location. You don't need to create additional sources.
- Update the [Default Stock](#). Ensure all of your websites are selected as sales channels. As you add new websites, Magento automatically adds them to the Default Stock. You don't need to create additional sources.

As your business expands, add additional sources and stocks and update your inventory management configuration to become a multi source merchants. See [Expanding to Multi Source Inventory](#) for all details.

### Multi Source Merchants

Multi Source merchants have one website or a multisite implementation and manage on-hand inventory and fulfilling orders through multiple locations. This is called multi-sourcing.

For example, you have a multisite implementation with websites for United States, Germany, France, and Brazil. Your business includes a number of warehouses and stores in these countries and drop shipper services that manage all inventory stock and fulfill orders. These locations and websites become sources and stocks in Magento. You may create a stock for the

Americas and another for Europe, assigning websites and sources based on locales and locations. Customers shopping each website only have access to salable inventories from the assigned sources.

To get started, we recommend:

- Configure global settings for your store's inventory as needed.
- Add **custom sources** for your inventory locations: warehouses, stores, distribution centers, and drop shippers.
- Add **custom stocks** for each region to map your websites with a number of sources. Reorder the sources in each stock in priority of location, helpful when fulfilling your orders.
- Assign sources to products, adding quantities per location.
- Complete any further configurations per product for quantity thresholds, backorders, and so on.

## Expanding and Restructuring Inventory

As your business grows and changes, Inventory Management supports your needs. You can expand to a Multi Source merchant or reduce down to a Single Source merchant with ease.

### To expand to Multi Source:

Single Source merchants may add new stores, warehouses, drop shippers, and more.

Expanding requires only a few additions and stock updates to expand to multisourcing:

- Add **custom sources** for each new location. You will only use the Default Source for Bundle products.
- Add **custom stocks** as needed for your new sources. For example, you may want to create stocks per website, country, locale, or other method. You can assign sources to your custom stocks. You will only use the Default Stock for Bundle products.
- Update **source assignments and quantities** for your products. You can also use the **Mass Actions Tool** and **Magento Import-Export** feature to quickly add sources and product data.

### To restructure to Single Source:

For Multi Source merchants wanting to reduce online sales to one location for shipping, modify your sources, stock, and quantities to update:

- Disable **custom sources**.
- Transfer product inventory to your Default Source. We recommend using mass actions. See **Transferring Inventory to Source**.
- Assign all websites to the **Default Stock**.

## Migrating and Upgrading to Inventory Management



If upgrading to Magento v2.3.x, this information provides details on new features and changes to your existing catalog and Inventory configurations.

Magento Inventory Management includes features, enhancements, and developer support that enhances and updates all product stock management and add new features. All features are available out-of-the-box including the Source Selection Algorithm and Concurrent Checkout to match order quantities to sources and order fulfillment. Depending on your websites, stores, and merchant type, you can create additional stock and sources, assigning inventory amounts, and more. For complete information, see [Inventory Management](#) and [Learn about Inventory Management](#).

When first installing or upgrading to Magento 2.3.x Open Source, Commerce, or Commerce Cloud, the following initial changes occur:

- [Inventory Management](#) enables at the global store or product level. The Manage Stock option enables or disables tracking of inventory quantities, calculations of aggregated salable quantities, and reservation management for tracking purchases through to invoice and shipment. You can disable this option to use an ERP and other third party services for managing stock, orders, and shipments. For additional information, see [Inventory Management Modules](#) below.
- A [Default Source](#) and [Default Stock](#) add to the system. Do not disable or remove these defaults. Magento assigns existing and newly imported products to these defaults.
  - Stocks provide an aggregated, virtual Salable Quantity with reservations to track shopping carts and orders, ensuring concurrent checkout.
  - All existing products in your catalog assign to the Default Source. Until you add new sources, the product interface does not change. If you only ship products from one location, you will not see additional differences for sources. You can create custom [sources](#) and [assign quantities](#) per shipment location.
  - Your website assigns to the Default Stock. You can create custom [stocks](#) to connect sales channels (websites) and sources (locations).
- Additional [configuration options](#) add to your products and global store. Some existing configurations options receive updated options and behaviors:
  - Notify for Quantity Below sends notifications and deducts from the Salable Quantity.
  - Out-of-Stock Threshold supports positive amounts, zero, and negative amounts. With Backorders enabled, positive amounts are ignored, considered zero (or infinite).
  - Backorders supports zero (infinite) and negative amounts. When enabled, the Notify for Quantity Below does not deduct from the Salable Quantity.
- New Reservations track potential sales, converting to quantity deductions when the order ships. You never directly access or create reservations. Magento creates and manages reservations behind-the-scenes through orders, shipments, and credit memos.

- **Orders and shipments** include new features to recommend shipments using the Source Selection Algorithm and support partial shipments from multiple sources to fulfill an order.
- New **import/export features** allow you to mass add sources, update inventory quantities, and set stock status (in/out of stock) for all SKUs in your catalog. These features allow you to modify for one, selected, or all sources.
- New bulk options through the Product grid page support **assigning sources**, **unassigning sources**, and **transferring inventory to sources**.

## Magento Order Management and Inventory Management

If you use **Magento Order Management** in your Magento implementation to manage, sell, and fulfill inventory from any sales channel, you need to fully disable the **Inventory Management extensions**. These modules provide all Inventory Management features to Magento, including Single and Multi Source management, stocks, reservations, and more.

We may support integrations between Magento Inventory Management (also known as MSI) and Magento Order Management in a later release.

Magento Order Management provides extensive features and services for advanced omnichannel order management, global inventory and multisourcing, store to warehouse fulfillment, and centralized customer service. For a complete list of features, see the **OMS Feature list**.

Magento Inventory Management extends existing Magento features with additional options to track in-flight orders, on-hand inventory, available inventory for a stock, and APIs for extension development.

## Inventory Management Modules

You may need to disable Inventory Management modules to:

- Speed up upgrade of merchants currently on Magento 2.0/2.1/2.2 and migrating to 2.3.x.
- Use custom or third party inventory and order management modules.
- Use Magento Order Management for inventory management. The current connector does not support Inventory Management interfaces. For OMS merchants upgrading to Magento 2.3.x, they need to disable these modules.

For complete details, see the DevDocs **Manage Inventory Management modules**.

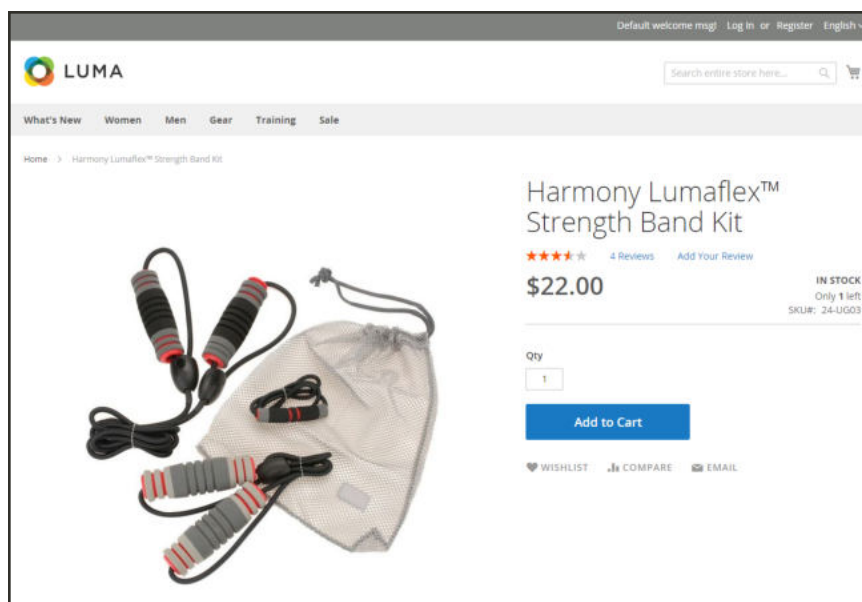
## Configuring Inventory Management

Magento supports inventory configuration settings at the product and global level, and provides additional settings that affect source availability, storefront products, and order shipment. The configuration settings apply to the catalog (Store > Configuration > Catalog > Inventory) as a whole or for specific products (Catalog > Products > Advanced Inventory).

Your catalog can be configured to display inventory data in your storefront, manage active shopping carts, and more. Display the availability of each item as “In Stock” or “Out of Stock” and the available inventory when stock is low.

The out of stock threshold indicates when a product needs to be reordered, subtracts from the Salable Quantity for a stock, and can be set to support enabled or disabled backorders. Allow backorders for your store, setting a maximum amount of orders for all or specific products.

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



*Example of In Stock, Only 1 Left*

## Configuration options

Magento stores and products support the following configurations for managing products, inventory, notifications and more. Magento provides additional configuration settings for bulk actions and the Distance Priority algorithm. For complete details, see [Inventory](#) configuration information.

OPTION	DESCRIPTION
Manage Stock	Enables Magento to manage all inventory. Sets if inventory control is used for this product or all products in Magento. Displays more options if set to Yes.
Only X left Threshold	Sets a quantity amount to notify when a specific amount is left available for purchase. This amount is tracked at the stock level.
Out-of-Stock Threshold	Your Safety Stock, Quantity to trigger an "out of stock" notification and to mitigate the risk of stockouts. This value affects backorders. Backorders disabled: We recommend entering a positive value over 0, such as 5 or 25. Backorders enabled: Enter a negative threshold for the maximum amount of allowed backorders, such as -5 or -25. A value of 0 acts as infinite stock. A positive value is ignored and treated as 0.
No Backorders	Does not accept backorders when product is out of stock
Allow Qty Below 0	Accepts backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	Accepts backorders when the quantity falls below zero, but notifies customers that orders can still be placed.
Minimum Qty Allowed in Shopping Cart	Sets the minimum quantity of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Sets the maximum quantity of the product that can be purchased in a single order.
Qty Uses Decimals	Allows decimal amounts, instead of whole numbers, for the quantity of a product. This is helpful for products sold by weight, volume, or length. Specified on the level of Source, calculated on the Stock level based on assigned Sources.
Allow Multiple Boxes for Shipping	Sets if parts of a product can be shipped separately.

OPTION	DESCRIPTION
Backorders	Indicates if Backorders are allowed. Specified on the level of Source, calculated on the Stock level based on assigned Sources. If enabled to allow backorders, we recommend setting a negative value for the Out-of-Stock Threshold. For details, see <a href="#">Configuring Backorders</a> .
No Backorders	Does not accept backorders when product is out of stock
Allow Qty Below 0	Accepts backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	Accepts backorders when the quantity falls below zero, but notifies customers that orders can still be placed.
Notify for Quantity Below	Sets the quantity that triggers a Quantity Below notification, warning of low stock. This amount is deducted from the Salable Quantity, not from the inventory Quantity.
Enable Qty Increments	Sets if the product can be sold in quantity increments. If enabled, enter the quantity of products that must be purchased in an incremental step.
Automatically Return Credit Memo Item to Stock	Inventory Management does not use this value. When you complete a return or Credit Memo, the product quantity is automatically returned to the affected source quantity.

### Configuration Fall Back and Inheritance

Configurations override or apply in the following path of inheritance: Product **Sources** section overrides Product **Advanced Options** overrides global **Inventory** store configuration.

When Magento checks for custom settings to apply, it follows this order:

1. Magento checks for custom settings at the Product level in the **Sources** section. A few settings are available.
2. Magento then checks the Product **Advanced Inventory** settings.
3. If **Use Config Settings** is selected for the product settings, it checks for a value in the Stores > Configuration > **Inventory** page.

For example, you may configure backorders differently across your store. You may have backorders configured as follows:

- Globally: Enable backorders for the store, set Out-of-Stock Threshold to -50
- Product: Disable backorders for a specific product, set Out-of-Stock Threshold to 10

## Enabling Inventory Management

To manage your product inventory, enable Inventory Management at the global store or product level. When the **Manage Stock** option is enabled, Magento Inventory Management automatically tracks product quantities available for the site through configured stocks and sources. Every feature and option begins tracking and reporting when enabled, without additional configuration.

Your business runs and inventory updates at the speed of sales. As customers shop, you receive exact, updated information for available stock per sales channel and source. Available salable quantities update per stock when customers add products to cart and complete purchases and when and you manage orders, create shipments, and issue refunds. Arrivals of new or transferred stock update to your sources, immediately available for online sales. Backorders complete up to specified thresholds without infinite orders or additional configurations. And you enter and complete partial or full shipments across one or more sources with recommendations, giving you complete control over order fulfillment and on-hand inventory.

By default, Inventory Management is enabled by default when installing or upgrading Magento. Depending on your business needs, you may want to enable or disable Magento tracked Inventory Management.


How this setting works in Single and Multi Source inventories:

- To use Magento Inventory Management, enable Manage Stock.
- Manage Stock settings at the product level override the store configuration.
- To use Magento Order Management or third party services such as ERP, disable Manage Stock.
- If the product level configuration uses the system default, the store configuration overrides.

With Inventory Management enabled, see the following to configure all settings:

- **Configuring Global Options:** Settings that affect your entire catalog, considered the system default settings
- **Configuring Product Options:** Settings for a specific product that override global options

### To manage stock for a store:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. Select the Store View to edit:
3. Tap **Catalog**. Then choose Catalog and Inventory.
4. Expand  the Stock Options section, and configure Manage Stock:

- To manage inventory and use all Magento features, select Yes.
  - To disable Magento Inventory Management, select No. You may need to clear the Use system value checkbox.
5. When complete, tap **Save Config**.

**Product Stock Options**

Please note that these settings apply to individual items in the cart, not to the entire cart.

**Manage Stock** [global] Yes  Use system value  
Changing can take some time due to processing whole catalog.

**Backorders** [global] No Backorders  Use system value  
Changing can take some time due to processing whole catalog.

**Maximum Qty Allowed in Shopping Cart** [global] 10000  Use system value

**Out-of-Stock Threshold** [global] 0  Use system value

**Minimum Qty Allowed in Shopping Cart** [global]

Customer Group	Minimum Qty	Action
ALL GROUP!	1	

**Notify for Quantity Below** [global] 1  Use system value

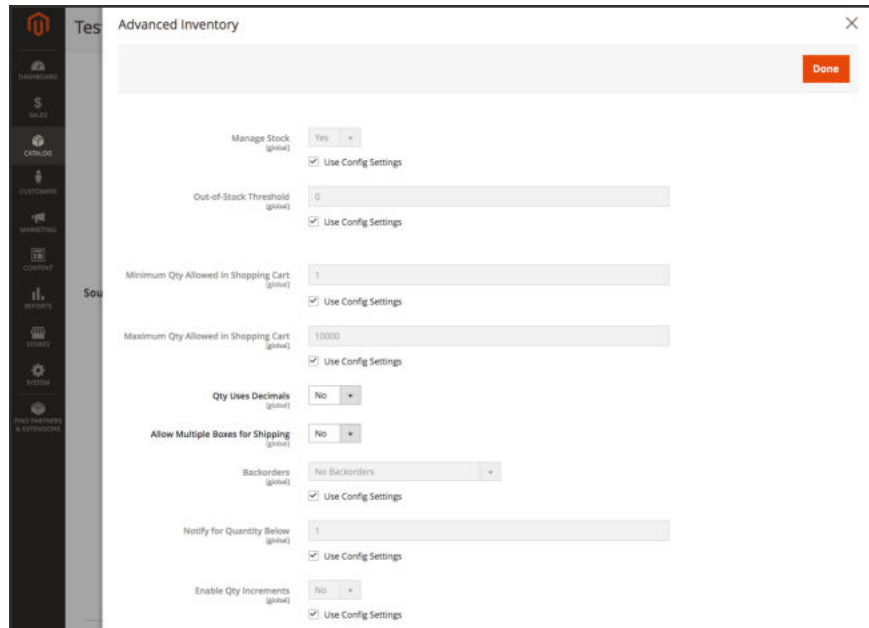
**Enable Qty Increments** [global] No  Use system value

**Automatically Return Credit Memo Item to Stock** [global] No

*Product Stock Options*

### To manage stock for a product:

1. On the Admin sidebar, tap **Catalog**. Then choose **Products**.
2. Locate and open a product in **Edit** mode.
3. In the Sources section, tap **Advanced Inventory**.
4. Configure Manage Stock:
  - To manage inventory and use all Magento features, select Yes.
  - To disable Magento Inventory Management, select No. You may need to clear the Use system value checkbox.
5. When complete, tap **Done**.



*Advanced Inventory for a Product*

## Configure Global Options

Configure the default configuration options for product and stock for your websites. Some of these settings can be overridden per product through [Configuring Product Options](#). To configure Distance Priority settings, see [Configuring Distance Priority Algorithm](#).

### To configure product and stock options globally:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under Catalog, choose **Inventory**.
3. Expand ☯ the **Stock Options** section.
  - a. To adjust the quantity on hand when an order is placed, set **Decrease Stock When Order is Placed** to “Yes.”
  - b. To return items to stock if an order is canceled, **Set Items’ Status to be in Stock When Order in Cancelled** to “Yes.”
  - c. Set **Display Out of Stock Products** to “Yes” to continue to display products in the catalog that are no longer in stock.

If [price alerts](#) are enabled, customers can sign up to be notified when the product is back in stock.

- d. Enter an amount for **Only X left Threshold** to start displaying the last remaining inventory amount on the product page.



The message begins to appear when the quantity in stock reaches the threshold. For example, if set to 3, the message “Only 3 left” appears when the quantity in stock reaches 3. The message adjusts to reflect the quantity in stock, until the quantity reaches zero.

- e. To display an “In Stock” or “Out of Stock” message on the product page, set **Display Products Availability In Stock on Storefront** to “Yes.”

**Stock Options**

Decrease Stock When Order is Placed   Use system value

Set Items' Status to be In Stock When Order is Cancelled   Use system value

Display Out of Stock Products   Use system value  
Products will still be shown by direct product URLs.

Only X left Threshold   Use system value

Display Products Availability in Stock on Storefront   Use system value

*Stock Options*

- 4. Expand ☺ the **Product Stock Options** section.
  - a. To activate **inventory control** for your catalog, set **Manage Stock** to “Yes.”

**Product Stock Options**

Please note that these settings apply to individual items in the cart, not to the entire cart.

Manage Stock   Use system value  
Changing can take some time due to processing whole catalog.

Backorders   Use system value  
Changing can take some time due to processing whole catalog.

Maximum Qty Allowed in Shopping Cart   Use system value

Out-of-Stock Threshold   Use system value

Minimum Qty Allowed in Shopping Cart  Use system value

Customer Group	Minimum Qty	Action
ALL GROUP!	1	

Notify for Quantity Below   Use system value

Enable Qty Increments   Use system value

Automatically Return Credit Memo Item to Stock   Use system value

*Product Stock Options*

- b. Set **Backorders** to one of the following:
  - No Backorders                      To not accept backorders when product is out of stock.

Allow Qty Below 0	To accept backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.

**c.** Enter the **Maximum Qty Allowed in Shopping Cart**.

**d.** Enter an amount for the **Out-of-Stock Threshold**:

Positive amount	With Backorders disabled, enter a positive amount.
Zero	With Backorders enabled, entering zero allows for infinite backorders.
Negative amount	With Backorders enabled, we recommend entering a negative amount. The amount is added to the Salable Quantity. For example, enter -50 to allow orders up to this amount.

**e.** Enter the **Minimum Qty Allowed in Shopping Cart** for selected group and amounts.

**f.** In the **Notify for Quantity Below** field, enter the stock level that triggers notification that the item is out of stock.

**g.** To activate quantity increments for the product, set **Enable Qty Increments** to "Yes." Then in the **Qty Increments** field, enter the number of the items that must be purchased to meet the requirement. For example, an item that is sold in increments of 6 can be purchased in quantities of 6, 12, 18, and so on.

**h.** For Inventory Management, **Automatically Return Credit Memo Item to Stock** is set to "No." When submitting a credit memo, you enter and select to return stock to sources.

**5.** Expand ☺ the **Admin bulk operations** section.

**a.** Set **Run asynchronously** to run bulk operations asynchronously for mass product actions including bulk **assign sources**, **unassign sources**, and **transfer inventory to source**. It collects bulk actions up to the Asynchronous batch size, then runs those actions. This option is disabled by default. We recommend reviewing your performance with bulk actions before enabling.

**Important:** To configure and support asynchronous queue managers, you need to issue a command using the command line. This step may require developer assistance. See [Magento DevDocs, Start message queue consumers](#).

**b.** If enabled, set the **Asynchronous batch size**. The default batch size is 100. When bulk processes reach this amount, they perform them at that time.

**Admin bulk operations**

Run asynchronously [global] Yes  Use system value  
An asynchronous queue manager must be configured

Asynchronous batch size [global] 100  Use system value

### *Admin Bulk Operations*

6. When complete, tap **Save Config**.

## Configuring Product Options

These configurations apply only to the edited product, overriding all configurations at the global website level. Modify these settings when editing a product, through the Sources section and Advanced Inventory page.

- Configure product options by source
- Configure product Advanced Inventory options

### To configure product options by source:

Configure the quantities and additional settings per **added source** for the product.

1. On the Admin sidebar, tap **Catalog**. Then choose **Products**.
2. Locate and open a product in **Edit** mode.
3. Expand ☺ the Sources section, and configure product settings per source:
  - a. Enter a Quantity amount.
  - b. Set the Stock Status as In Stock or Out of Stock.
  - c. To modify the Notify for Quantity Below per source, clear or select the **Notify Quantity Use Default** checkbox. If cleared, enter the stock level that triggers notification that the item is out of stock. This amount is subtracted from the Salable Quantity at the stock level.
 

Select to use Default	Magento checks the product Advanced Inventory options for configuration settings.
Clear to Modify	Enter a value for the Notify Quantity, overriding Advanced Inventory and Store configuration settings.
4. When complete, tap **Done**, then **Save**.

Assign Sources

Advanced Inventory

Assigned Sources

Name	Source Status	Source Item Status	Qty *	Notify Qty	
Default Source	Enabled	In Stock ▼	0	1	
				<input checked="" type="checkbox"/> Use Default	
Germany Warehouse	Enabled	In Stock ▼	324	1	
				<input checked="" type="checkbox"/> Use Default	
London Warehouse	Enabled	In Stock ▼	130	1	
				<input checked="" type="checkbox"/> Use Default	
UK Drop Shipper	Enabled	In Stock ▼	1003	1	
				<input checked="" type="checkbox"/> Use Default	

Sources Section for Product

- When complete, tap **Done**, then **Save**.

### Field Descriptions

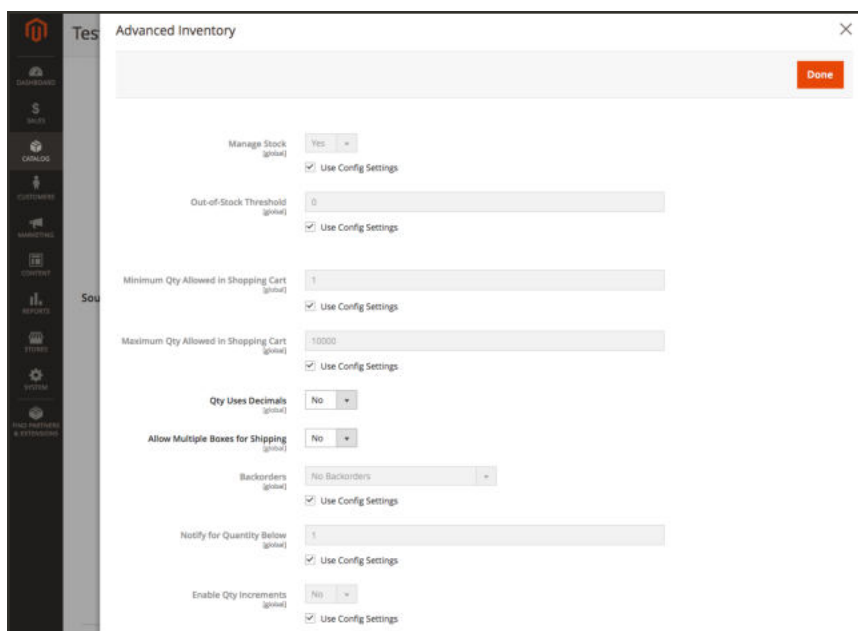
FIELD	SCOPE	DESCRIPTION
Source Code	Global	The unique code for a <b>source</b> .
Name	Global	The unique name for a source.
Status	Global	Product is enabled or disabled in the catalog.
Source Item Status	Global	Determines the current availability of the product. Options: <ul style="list-style-type: none"> <li>In Stock      Makes the product available for purchase.</li> <li>Out of Stock    Unless Backorders are activated, prevents the product from being available for purchase and removes the listing from the catalog.</li> </ul>

**Field Descriptions (cont.)**

FIELD	SCOPE	DESCRIPTION
Qty	Global	On-hand stock amounts for each source, or location
Notify Quantity	Global	An amount for the Notify for Quantity Below for this specific source if Notify Quantity Use Default is not selected.
Notify Quantity Use Default	Global	Indicates to use the default setting for Notify for Quantity Below in the product Advanced Inventory or global setting in Store configuration.

**To configure advanced product options:**

1. On the Admin sidebar, tap **Catalog**. Then choose **Products**.
2. Locate and open a product in **Edit** mode.
3. Expand ☺ the Sources section, tap **Advanced Inventory** and configure:
  - a. To activate **inventory control** for your catalog, set **Manage Stock** to “Yes.”



*Advanced Inventory for a Product*

- b. Enter an amount for the **Out-of-Stock Threshold**:
 

Positive amount	With Backorders disabled, enter a positive amount.
-----------------	--

Zero	With Backorders enabled, entering zero allows for infinite backorders.
Negative amount	With Backorders enabled, we recommend entering a negative amount. The amount is added to the Salable Quantity. For example, enter -50 to allow orders up to this amount.

- c.** Enter the **Minimum Qty Allowed in Shopping Cart**.
- d.** Enter the **Maximum Qty Allowed in Shopping Cart**.
- e.** Set **Qty uses Decimals** to Yes/No if customers can use a decimal value rather than a whole number when entering the quantity ordered.
- f.** Set **Allow Multiple Boxes for Shipping** to Yes/No if the product can be sold separately, in many boxes.
- g.** Set **Backorders** to one of the following. For complete information on backorders, see [Configuring Backorders](#).

No Backorders	To not accept backorders when product is out of stock.
Allow Qty Below 0	To accept backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.

- h.** In the **Notify for Quantity Below** field, enter the stock level that triggers notification that the item is out of stock. This amount is subtracted from the Salable Quantity at the stock level.
  - i.** To activate quantity increments for the product, set **Enable Qty Increments** to “Yes.” Then in the **Qty Increments** field, enter the number of the items that must be purchased to meet the requirement. For example, an item that is sold in increments of 6 can be purchased in quantities of 6, 12, 18, and so on.
- 4.** When complete, tap **Done**, then **Save**.

**Field Descriptions**

FIELD	SCOPE	DESCRIPTION	
Manage Stock	Global	Determines if inventory control is used to manage this product in your catalog. Options:	
		Yes	Enables all Magento Inventory Management features.
		No	Disables all Magento Inventory Management features.

**Field Descriptions (cont.)**

FIELD	SCOPE	DESCRIPTION
Out-of-Stock Threshold	Global	Determines the stock level at which a product is considered to be out of stock.
		Positive amount      With Backorders disabled, enter a positive amount.
		Zero      With Backorders enabled, entering zero allows for infinite backorders.
		Negative amount      With Backorders enabled, we recommend entering a negative amount. The amount is added to the Salable Quantity. For example, enter -50 to allow orders up to this amount.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum number of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of the product that can be purchased in a single order.
Qty Uses Decimals	Global	Determines if customers can use a decimal value rather than a whole number when entering the quantity ordered. Options:
		Yes      Permits values to be entered as decimals, rather than whole numbers, which is suitable for products sold by weight, volume or length.
		No      Requires quantity values to be entered as whole numbers.
Allow Multiple Boxes for Shipping	Global	Determines if parts of the product can be shipped separately. Options: Yes / No
Backorders	Global	Determines how backorders are managed. Backorders do not change the processing status of the order. Funds are still authorized or captured immediately when the order is placed, regardless of whether the product is in stock. Products are shipped as they become available.

When enabled, we recommend entering a negative amount for the Out-of-Stock Threshold.



**Field Descriptions (cont.)**

FIELD	SCOPE	DESCRIPTION
		Options:
		No Backorders Does not accept backorders when product is out of stock.
		Allow Qty Below 0 Accepts backorders when the quantity falls below zero.
		Allow Qty Below 0 and Notify Customer Accepts backorders when the quantity falls below zero, but notifies customers that orders can still be placed.
Notify for Quantity Below	Global	Sets the quantity that triggers a Quantity Below notification, warning of low stock. This amount is deducted from the Salable Quantity, not from the inventory Quantity.
Enable Qty Increments	Global	Determines if the product can be sold in quantity increments. Options: Yes / No

## Configuring Backorders

Backorders allow your store to continue selling products after the quantity reaches zero, or is effectively out of stock. When a customer order is a backorder, the funds are authorized and captured immediately, the processing status of the order does not change, and the shipping remains on-hold until stock is available.

Depending on your store and sales, you may want to enable or disable backorders at the following levels:

- Global - All products in your catalog at the site level
- Source - All products with the assigned source
- Product - Specific products overriding settings for site, source, and stock

### Understand Backorder Settings

We recommend configuring specific thresholds and settings to best support backorders.

#### Out-of-Stock Threshold

Use a negative value for this threshold to set the maximum amount of products that can be backordered before the product is truly considered out of stock. This amount adds to the salable quantity. The value set at the product level overrides any value set at the global level.

The formula for the Salable Quantity is: (Quantity - (out-of-Stock Threshold)).

The following is an example:

- Quantity: 25
- Notify for Quantity Below: 10
- Only X left Threshold: 5
- Out of Stock Threshold: -50

The Salable Quantity for this product is 75 (25 - (-50)).

Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity per Source	Salable Quantity
	Endeavor Daytrip Backpack	Simple Product	Default	24-WB06	\$33.00	New York Warehouse : 25	New York Stock : 15

*Example Salable Quantity before backorders enabled*

Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity per Source	Salable Quantity
	Endeavor Daytrip Backpack	Simple Product	Default	24-WB06	\$33.00	New York Warehouse : 25	New York Stock : 75

*Example Salable Quantity after backorders enabled*

When customers purchase over 25 products, new orders enter as backorders. As the product's salable quantity reduces to 5 (70 items have been sold), the product page will display a message "Only 5 left" on front-end. When the salable quantity reaches 0, the product displays as Out of Stock in the storefront.

### Notify for Quantity Below

The Notify for Quantity Below configuration option is configurable at the global, source, and product levels. It sends an email notification when a product's quantity reaches a low quantity. For this example, the notification sends when the product has a quantity of 10 or less. When backorders are enabled, the Notify for Quantity Below is not deducted from the Salable Quantity.

### Stock Status

Products must be set to **In Stock** status when enabling backorders. You can set this through the Product page. For multi source merchants, you must have at least one source marked as In Stock. Access and set the status through the product page and assigned sources grid.


### Configure Backorders Globally

These steps enable backorders for all products at the site level.

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. Select Default Config for the Store View.
3. Tap **Catalog**, then choose **Inventory**.

- Expand  the Product Stock Options, and locate Backorders. Clear the **Use system value** checkbox and select an option from the drop-down menu:

No Backorders	To not accept backorders when product is out of stock.
Allow Qty Below 0	To accept backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.

- Expand  the Product Stock Options, and locate Out-of-Stock Threshold. Clear the **Use system value** checkbox to enter a different amount.

Positive amount	With Backorders disabled, enter a positive amount.
Zero	With Backorders enabled, entering zero allows for infinite backorders.
Negative amount	With Backorders enabled, we recommend entering a negative amount. The amount is added to the Salable Quantity. For example, enter -50 to allow orders up to this amount.

- Tap **Save Config.**

### Configure Backorders for a Product

Product level configurations override global configurations. You may want to configure backorders at the product level to override the settings at the global store or source level. For example, your store may globally support backorders. With product settings, you can disable backorders or change the Out-of-Stock threshold without affecting other products and sources.

- On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
- Locate and open a product in **Edit** mode. Scroll down the page to the Sources area.
- Tap **Advanced Inventory**. A page of product specific configurations displays. Any setting listed as global displays the current global setting for the store.
- Locate **Backorders** and clear the **Use Config Setting** checkbox and select an option from the drop-down menu:

No Backorders	To not accept backorders when product is out of stock.
Allow Qty Below 0	To accept backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.

- Locate Out-of-Stock Threshold and clear the **Use Config Setting** checkbox to enter an amount:

Positive amount	With Backorders disabled, enter a positive amount.
Zero	With Backorders enabled, entering zero allows for infinite backorders.
Negative amount	With Backorders enabled, we recommend entering a negative amount. The amount is added to the Salable Quantity. For example, enter -50 to allow orders up to this amount.

6. Tap **Done**, then tap **Save**.

The screenshot shows the 'Advanced Inventory' configuration page. The settings are as follows:

- Manage Stock: Yes
- Use Config Settings:
- Out-of-Stock Threshold: -50
- Use Config Settings:
- Minimum Qty Allowed in Shopping Cart: 1
- Use Config Settings:
- Maximum Qty Allowed in Shopping Cart: 10000
- Use Config Settings:
- Qty Uses Decimals: No
- Allow Multiple Boxes for Shipping: No
- Backorders: Allow Qty Below 0
- Use Config Settings:
- Notify for Quantity Below: 1
- Use Config Settings:
- Enable Qty Increments: No
- Use Config Settings:

*Advanced Inventory configured for Backorders*

## Configuring Source Priority Algorithm

Custom stocks include an assigned list of sources to sell and ship available product inventory through your storefront. This algorithm uses the order of assigned sources in your stock to make recommendations.

When run, the algorithm:

- Works through the configured order of sources at the stock level starting at the top
- Recommends a quantity to ship and source per product based on the order in the list, available quantity, and quantity ordered
- Continues down the list until the order shipment is filled
- Skips disabled sources if found in the list

To configure, arrange those sources from top-to-bottom in priority for fulfilling orders. The Source Selection Algorithm (SSA) provides an algorithm Priority using this order when determining shipment and inventory deductions. See [Prioritizing Sources for a Stock](#).

**Important:** When using the [Distance Priority](#) algorithm for shipping, if routes and data do not return for the selected [Computation mode](#) (driving, bicycling, or walking) for a shipment, the SSA defaults to using the Source Priority.

Assign Sources			
Assigned Sources	Code	Name	Unassign
	uk_warehouse	London Warehouse	
	uk_drop_shipper	Drop Shipper UK	
	de_warehouse	Berlin Warehouse	
	uk_store	London Flagship Store	
	us_drop_shipper	Drop Shipper US	

*Source order after prioritization*

## Configuring Distance Priority Algorithm

The Distance Priority algorithm compares the location of the shipping destination address with source locations to determine the closest source to fulfill shipments. The distance may be determined by physical distance or time spent traveling from one location to another, using database data or driving, walking, or bicycling directions. Use this [Source Selection Algorithm](#) to recommend the closest source to shipping destination addresses.

We recommend entering the full street address and GPS coordinates for your [sources](#) if using the Distance Priority algorithm.

You have two options for calculating the distance and time to find the closest source for shipment fulfillment:

- Google MAP:** Uses [Google Maps Platform](#) services to calculate the distance and time between the shipping destination address and source locations. This option uses the source's Latitude and Longitude (GPS coordinates) and may use the street address depending on the computation mode. This option uses the source's Latitude and Longitude. You must provide a Google API key with [Geocoding API](#) and [Distance Matrix API](#) enabled, and may incur charges through Google.

- **Offline Calculation:** Calculates the distance using downloaded and imported geocode data using zip/post codes and GPS coordinates to determine the closest source to the shipping destination address. To configure this option, you may require developer assistance to initially download and import geocodes using a command line.

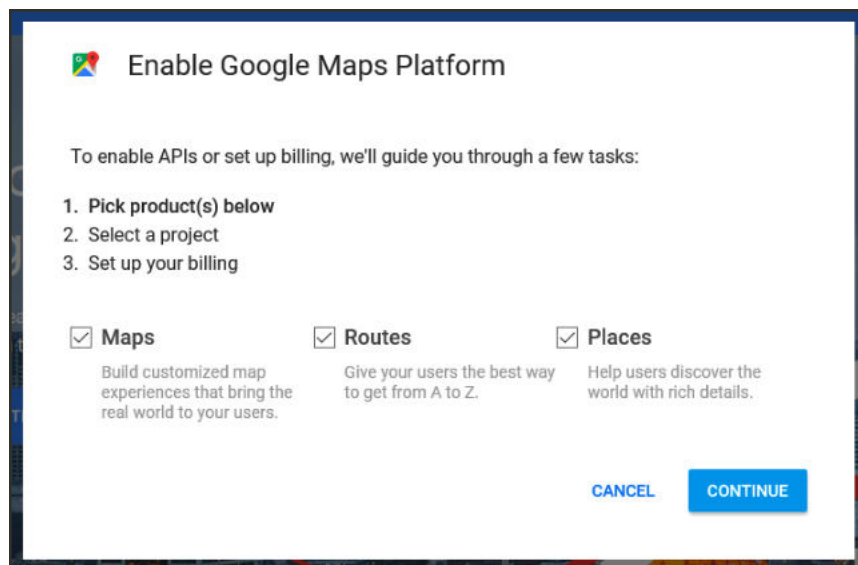
### To configure Google Maps:

You do not need a Google account to get started. The process includes Google account and project creation if needed. This option requires a billing account and payment method added to your Google account to complete configurations and use the algorithm.

#### Step 1: Create the Google API Key

The key is from the [Google Maps Platform](#) and should have [Geocoding API](#) and [Distance Matrix API](#) enabled. For details, see [Configuring Distance Priority Algorithm](#).

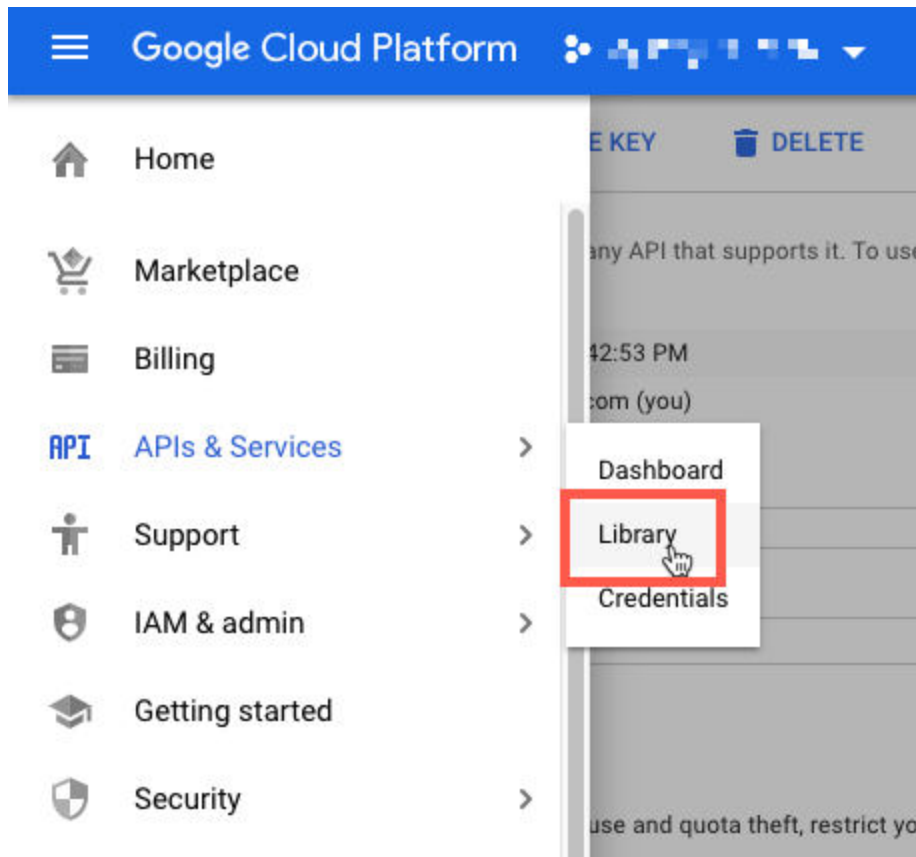
1. Visit [Google Maps Platform](#) and click **Get Started**.
2. To enable the platform, select Maps, Routes, and Places and click **Continue**.



*Google Maps Platform for your Key*

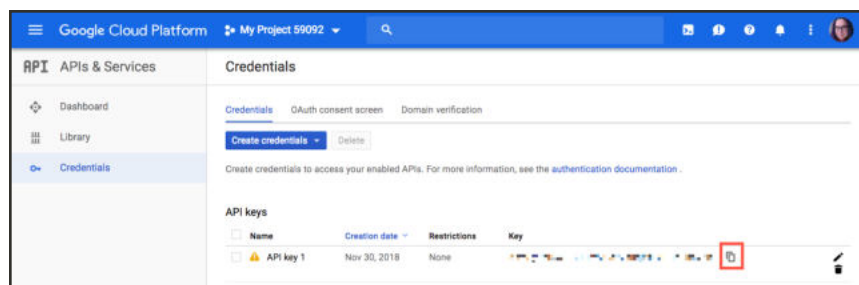
3. Sign in with a Google account or create a new account.
4. Set up a project:
  - a. Select a project or enter a new project name.
  - b. Select **Yes** to accept the terms.
  - c. Click **Next**.

5. Enter a billing account, or create one. You can skip and add a billing account later. The account is required to use this service.
6. Click **Console** to open and configure your Google Cloud Platform options.
  - a. Open your project.
  - b. Expand the menu and click **APIs & Services > Library**.



*Google API Services*

- c. Search for **Geocoding API** and **Distance Matrix API**. Select and enable each service.
7. Expand the menu and click **APIs & Services > Credentials**. Copy the Google API Key.



*Google API Key Copy*

### Step 2: Configure the Google MAP Provider

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under Catalog, choose **Inventory**.
3. Expand ☺ the **Distance Provider for Distance Based SSA** section, and set **Provider** to "Google MAP".



*Distance Providers for Distance Based SSA*

4. Expand ☺ the **Google Distance Provider** section, and configure the settings:
  - a. Enter the **Google API Key**, copied from your Google Account.
  - b. For **Computation mode**, select a configuration.

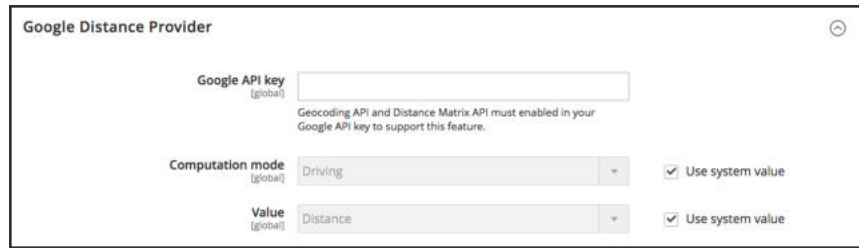
**Important:** When using this algorithm for shipping, if routes and data does not return for the selected Computation mode (driving, bicycling, or walking) for a shipment, the SSA defaults to using the Source Priority. We recommend also setting the **priority for sources per stock**.

Driving	Default setting, requests standard driving directions using the road network
Walking	Requests walking directions using pedestrian paths and sidewalks (where available)
Bicycling	Requests bicycling directions using bicycle paths and preferred streets (where available). The <b>Distance Matrix Service</b> is currently only available in the US and some Canadian cities.

- c. For **Value**, select a value type:

Distance	Default setting, returns the distance between points in metrics (kilometers and meters) or imperial (miles and feet)
Time to Destination	Returns the time required to travel from the source locations to the shipping address in hours and minutes





*Google Distance Provider*

- When complete, tap **Save Config**.

**To configure Offline Calculation:**

Offline calculations use country codes to determine the distance between the shipping destination and source addresses. This option may require developer assistance to configure. You will issue a an Inventory Management CLI command to download and import data from [geonames.org](https://www.geonames.org).

**Step 1: Download and Import Geocodes**

Complete command line configuration to download and import geocodes countries to ship to and have source locations in. This step may require developer assistance. See DevDocs [Import geocodes for Inventory Management](#).

Complete these commands anytime you need to add more geocodes.

**Step 2: Configure Offline Calculation**

- On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
- In the panel on the left under Catalog, choose **Inventory**.
- Expand ☺ the **Distance Provider for Distance Based SSA** section, clear the **Use system value** checkbox and set **Provider** to "Offline Calculation".

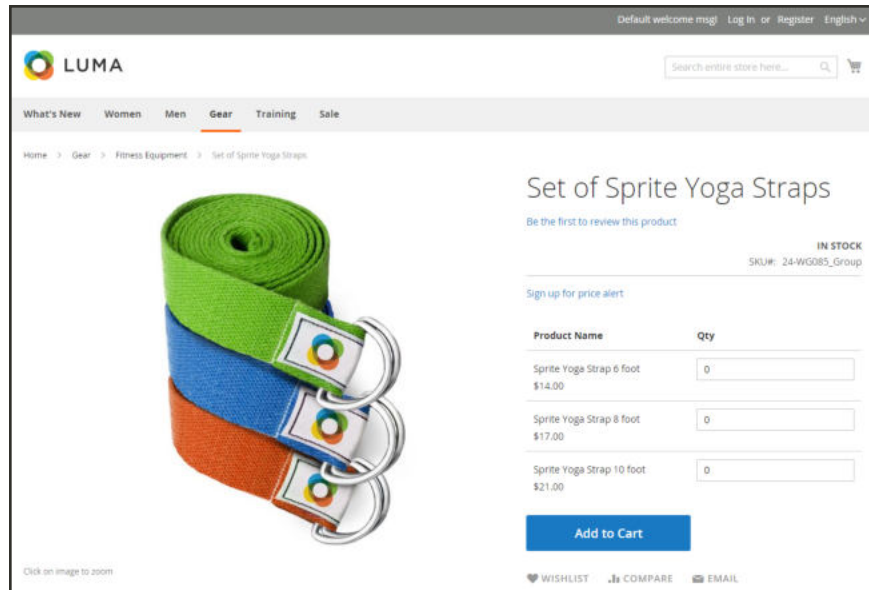


*Distance Providers for Distance Based SSA*

- When complete, tap **Save Config**.

## Product Alerts

Customers can subscribe to two types of alerts by email: price change alerts and in-stock alerts. For each type of alert, you can determine if customers are able to subscribe, select the email template that is used, and identify the sender of the email.



*Sign Up for Price Alert*

### Price Change Alerts

When price change alerts are enabled, a “Sign up for price alert” link appears on every product page. Customers can click the link to subscribe to alerts related to the product. Guests are prompted to open an account with your store. Whenever the price changes, or the product goes on special, everyone who has signed up to be notified receives an email alert.

### In-Stock Alerts

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

The screenshot shows the 'Overnight Duffle' product configuration page in the Magento admin. It features two sections for alert subscriptions: 'Alert Stock' and 'Alert Price'. The 'Alert Stock' section shows one record found, with a table listing a customer named Veronica Costello. The 'Alert Price' section shows zero records found and a message stating 'There are no customers for this alert.' The interface includes navigation buttons like 'Back', 'Add Attribute', and 'Save', as well as pagination controls for both sections.

First Name	Last Name	Email	Subscribe Date	Last Notified	Send Count
Veronica	Costello	roni_cost@example.com	Jun 7, 2018		0

First Name	Last Name	Email	Price	Subscribe Date	Last Notified	Send Count
There are no customers for this alert.						

*List of Product and Price Alert Subscriptions*

### To set up product alerts:

First, you need to set up and configure price alerts through the Stores > Configuration settings.

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Click to expand the **Product Alerts** section. Configure price alerts:
  - a. To offer price change alerts to your customers, set **Allow Alert When Product Price Changes** to “Yes.”
  - b. Set **Price Alert Email Template** to the template that you want to use for the price alert notifications. The default email template is selected for your theme. To create a new email template, see [templates below](#).
  - c. To offer alerts when out-of-stock products become available again, set **Allow Alert When Product Comes Back in Stock** to “Yes.”

The “Sign up to get notified when this product is back in stock” message appears only when Inventory Stock Options - Display Out of Stock Products is set to “Yes.”

- d. Set **Stock Alert Email Template** to the template that you want to use for product stock alerts.
- e. Set **Alert Email Sender** to the [store contact](#) that you want to appear as the sender of the email alert.

### *Product Alerts*

4. When complete, tap **Save Config**.

### To configure product alerts email templates:

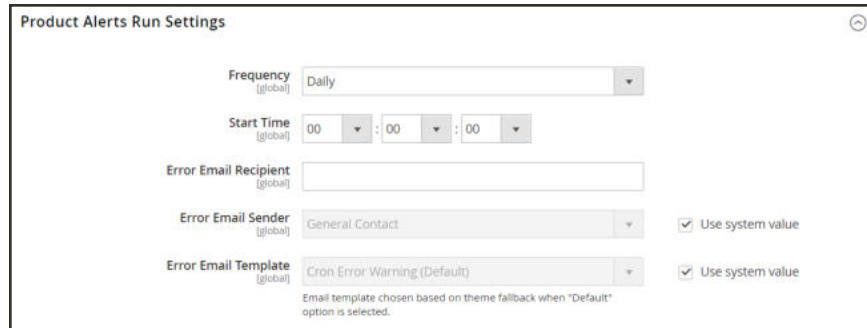
Next, configure, add, or modify the [email template](#) for your price alert. You may want to edit your price alert configurations after creating any new templates.

1. On the Admin sidebar, tap **Marketing**. Then under Communications, choose **Email Templates**.
2. Tap **Add New Template**.

3. Under **Load default template**, in the **Template** list, choose the template that you want to customize. This may be the alert template from your theme. Or you can select the Price Alert or Stock Alert templates under `Magento_PriceAlert`. Tap **Load Template**.
4. Enter a **Template Name**. You can select this name in the Price Alerts configuration.
5. Read through the existing content and make changes as needed for the following:
  - **Template Subject**: Displays in the subject line of an email.
  - **Template Content**: Displays in the full content of the sent email.
6. To add generated information from Magento data, use the **Insert Variable** option. A list of available variables displays.
7. Tap **Save Template**.

## Product Alert Run Settings

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



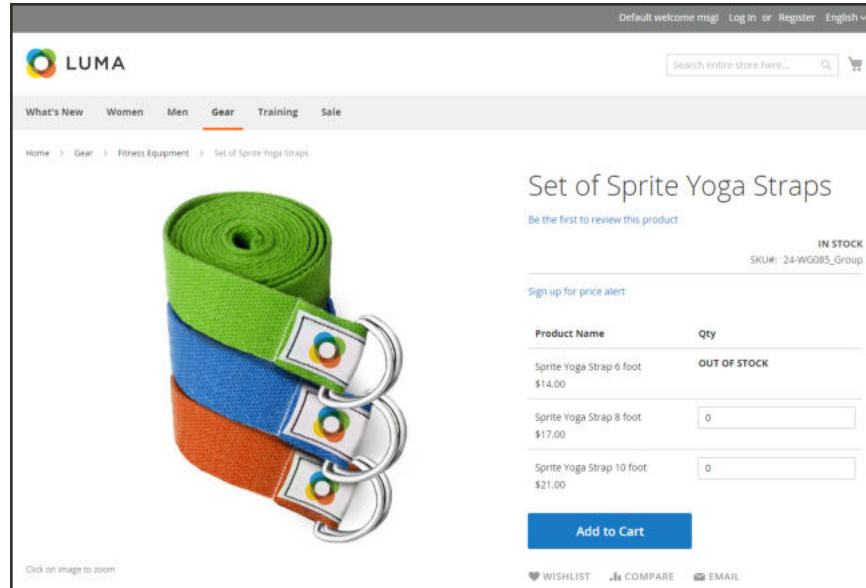
*Product Alert Run Settings*

### To set up product alerts:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Product Alerts Run Settings** section, and do the following:
  - a. To determine how often product alerts are sent, set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly
  - b. To determine the time of day product alerts are sent, set **Start Time** to the hour, minute, and second.
  - c. In the **Error Email Recipient** field, enter the email of the person to be contacted if an error occurs.
  - d. In the **Error Email Sender** field, select the store identity that appears as the sender of the error notification.
  - e. Set **Error Email Template** to the transactional email template to be used for the error notification.
4. When complete, tap **Save Config**.

## Stock Message Scenarios

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



Grouped Product with “Out of Stock” Message

### Product Page Stock Messages

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

#### Example 1: Show Availability Message

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

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
<b>Product Inventory</b>		
Manage Stock	Yes	
Stock Availability	In Stock	“Availability: In Stock”
	Out of Stock	“Availability: Out of Stock”

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

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
<b>Product Inventory</b>		
Manage Stock	No	“Availability: In Stock”

**Example 2: Hide Availability Message**

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

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

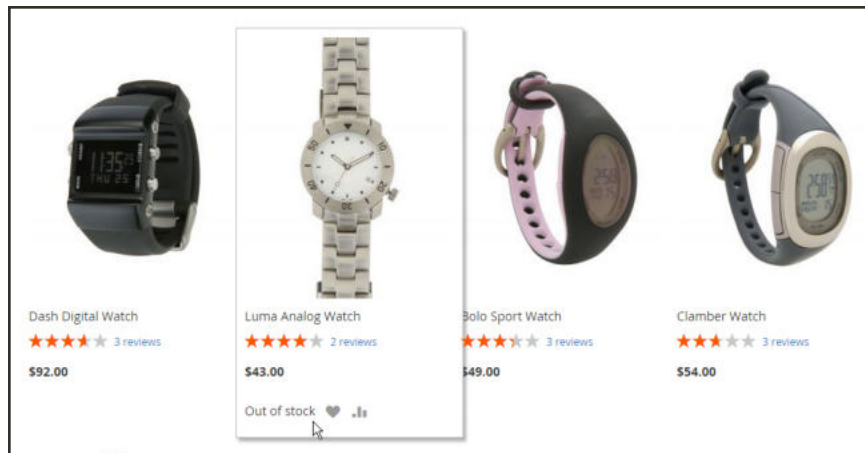


**Scenario 2:** When stock is not managed for a product, this combination of configuration and product settings prevents the availability message from appearing on the product page.

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

### Catalog Page Stock Messages

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



*“Out of Stock” Message on Category Page*

**Example 1: Show Product with “Out of Stock Message”**

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

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

**Example 2: Show Product without “Out of Stock Message”**

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

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

**Example 3: Hide Product Until Back in Stock**

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

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	No	None

## Managing Sources

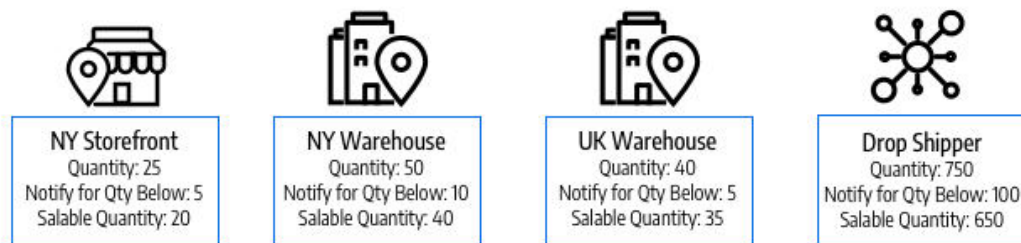
Sources represent locations storing and shipping your product stock. Any location with available stock and capable of order fulfillment can be added as a source such as warehouses, brick-and-mortar stores, distribution centers, and drop shippers.

Sources are the physical locations where product inventory is managed and shipped for order fulfillment, or where services are available. These locations can include warehouses, brick-and-mortar stores, distribution centers, and drop shippers. You allocate inventory quantities to these sources, and Magento automatically aggregates the total salable products for your stocks. For large companies, add multiple sources for all of your locations: in different geographic locations by country and continent, locations in a city, based on the type of inventory, even based on services.

You start with a Default Source you can update but not disable. This source is used by Single Source Merchants and for product migration. You always need a default source.

- **Location Information** - Each source includes the name, country, physical address of the location, and a point of contact.
- **Enabling Resources** - You can enable and disable sources as needed. Only enable a source if it accepts and fulfills orders and backorders.
- **Available Inventory** - Assign and update inventory quantities for each source through the product page. The inventory quantities are calculated, provided, and reserved through the source and stock mapping. See [Managing Inventory Quantities](#).

The following diagram helps define the Sources for a Bicycle Shop merchant selling a mountain bike, available to stocks and accessible by the SSA for shipments.



*Example Sources for a Mountain Bike*

All stores begin with a Default Source that must remain enabled:

- All new products imported into Magento require a source and stock, automatically assigned for immediate access to inventory management.
- Single Source merchants use the Default Source as their single point of inventory location and shipments.
- Bundle products currently do not support multi-sourcing and must be assigned to Default Source and Default Stock.

## Editing Sources

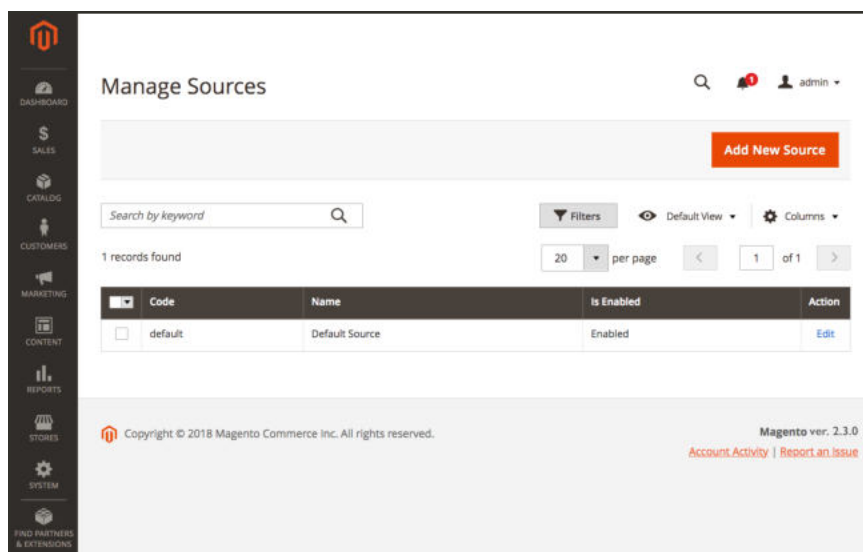
You can update the name, address, GPS location, and point of contact information. The source's code is a protected value, acting as a unique ID associating the source with your product quantities and stocks.

If editing the Default Source, you can edit all configurations except the code. We recommend Single Source merchants add information for their location, including the address, a contact, and GPS coordinates.

The **Manage Sources** page lists all available inventory locations and fulfillment facilities. You can add new inventory sources, and edit existing locations.

### To manage inventory sources:

1. On the Admin sidebar, tap **Stores**. Then under **Inventory**, choose **Sources**.
2. To add a new inventory location, see [Adding a New Source](#).
3. Find the inventory source and open in **Edit** mode. Then, update the information, and save the changes.



*Manage Sources*

### Button Bar

COLUMN	DESCRIPTION
<b>Add New Source</b>	Opens the New Source form that is used to enter a new inventory source, fulfillment facility, or location.

**Column Descriptions**

COLUMN	DESCRIPTION
Code	A unique, alphanumeric code that is used by the system to identify the inventory source. You cannot edit this value after creating a source.
Name	A unique name that identifies the inventory source for Admin users.
Is Enabled	Indicates if the inventory source is active and available to use.
Action	Edit Opens the inventory source record in edit mode.

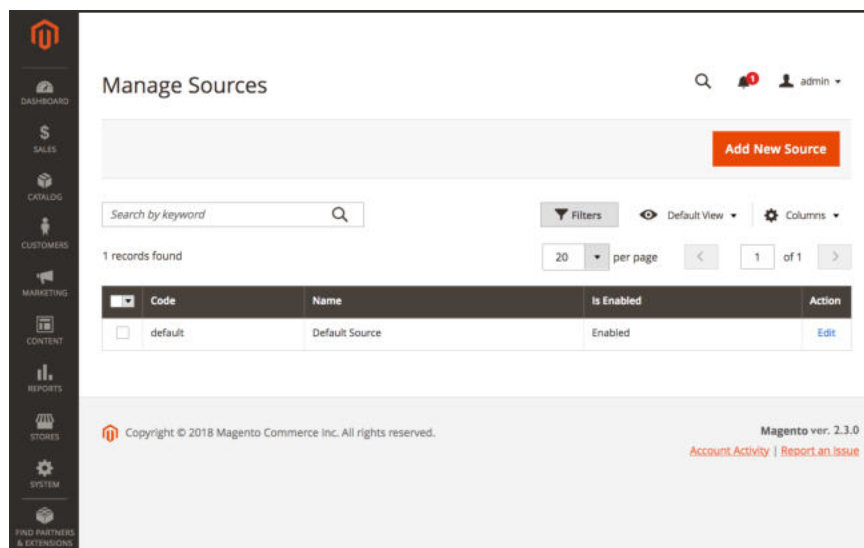
## Adding a New Source

Manage inventory and order fulfillment from multiple locations with custom sources. Create a source for each location such as warehouses, brick-and-mortar stores, distribution centers, and drop shippers. Assign sources and update quantities per product


If editing the Default Source, you can edit all configurations except name and code. We recommend single source merchants add information matching their location.

### To add a new inventory source:

1. On the Admin sidebar, tap **Stores**. Then under **Inventory**, choose **Sources**.
2. Tap **Add New Source**.



*Manage Sources*

3. Expand  the **General** section, and do the following:
  - a. Enter a unique **Name** to identify the inventory source.
  - b. Enter a unique **Code**. The code supports upper and lower case letters, numbers, dashes, and underscores. The code is a unique ID used when assigning to stock and exporting-importing data.
  - c. If this inventory source is ready to use, set **Is Enabled** to “Yes.”
  - d. Enter a brief **Description** for this location for quick reference or additional details.
  - e. In the **Latitude** and **Longitude** fields, enter the Global Positioning System (GPS) coordinates of the facility location.

To find the GPS coordinates with **Google Maps**, enter the address in the **Search** box. Right-click the marker on the map and choose **What’s here?** The GPS coordinates appear in the details box below the street address.



The screenshot shows a form titled "General" with the following fields and controls:

- Name**: A text input field with a red asterisk indicating it is required.
- Code**: A text input field with a red asterisk indicating it is required.
- Is Enabled**: A toggle switch currently set to "Yes". Below it is a note: "The Default Source must be enabled. A default source is required for single source merchants and product migration."
- Description**: A large text area for entering a description.
- Latitude**: A text input field.
- Longitude**: A text input field.

*General*

4. Expand ☺ the **Contact Info** section, and do the following:
  - a. For the **Contact Name**, enter the full name of the primary contact at the location.
  - b. Enter an **Email** address for contacting the location.
  - c. For the **Phone**, enter the area code and phone number.
  - d. In the **Fax** field, enter the area code and phone number of the fax, if available.




The screenshot shows a form titled "Contact Info" with the following fields:

- Contact Name**: A text input field.
- Email**: A text input field.
- Phone**: A text input field.
- Fax**: A text input field.

*Contact Info*

5. Expand ☺ the **Address Data** section, and do the following:
  - a. Choose the **Country**.
  - b. For the **State/Province**, enter the standard abbreviation for the state or province.
  - c. Enter the **City**.
  - d. Enter the physical **Street** address.
  - e. For the **Postcode**, enter the ZIP or postal code.

*Address Data*

6. To save your work, do one of the following:
- To save your work and continue editing, tap **Save & Continue**.
  - To save your work and return to the Manage Sources page, tap the down arrow (  ) and choose **Save & Close**.
  - To save your work on the current source record and enter a new source, choose **Save & New**.

**Button Bar**

COLUMN	DESCRIPTION
<b>Back</b>	Returns to the Manage Sources page.
<b>Reset</b>	Restores all fields in the form to their values at the time of the last save.
<b>Save &amp; Continue</b>	Saves all changes, and keeps the form open for further editing. Click the down arrow for these additional options: <ul style="list-style-type: none"> <li>Save &amp; Close      Saves changes to the current record, closes the form, and returns to the Manage Sources page.</li> <li>Save &amp; New        Saves changes and closes the current record, and opens a new blank form.</li> </ul>

**Field Descriptions**

FIELD	DESCRIPTION
<b>GENERAL</b>	
Name	(Required) A unique name that identifies the inventory source for Admin users.



**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Code	<p>(Required) A unique, alphanumeric code that is used by the system to identify the inventory source. Enter the code in upper or lowercase characters and/or numbers, without spaces. If necessary, a hyphen or underscore can be used instead of a space.</p> <p>The code cannot be edited after creating the source. It is a unique ID used when you assign sources to stocks and export and/or import product data.</p>
Is Enabled	Determines if the inventory source is available to be used. Options: Yes / No
Description	A brief description of the inventory source location. Include details helpful to your Admin users.
Latitude	<p>Specifies the latitude coordinate of the inventory source for GPS. Enter the value as a number, preceded by a plus or minus sign as needed. The degree symbol and letters are not permitted. For example:</p> <p>Latitude 32.7555</p>
Longitude	<p>Specifies the longitude coordinate of the inventory source for GPS. Enter the value as a number, preceded by a plus or minus sign as needed. The degree symbol and letters are not permitted. For example:</p> <p>Longitude -97.3308</p>
<b>CONTACT INFO</b>	
Contact Name	The name of the primary contact at the inventory source location.
Email	The email of the primary contact.
Phone	The area code and telephone number of the primary contact, using the format that you prefer. For example: (123) 456-7890 or 123-456-7890
Fax	The area code and fax number of the primary contact.
<b>ADDRESS DATA</b>	
Country	(Required) The country where the inventory source is located.
State/Province	The state or province where the inventory source is located.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
City	The city where the inventory source is located.
Street	The street address of the inventory source.
Postcode	(Required) The ZIP or postal code of the inventory source.

## Disabling Sources

Sources may not be deleted to ensure all order data retains in Magento. Sources, orders, and shipments are directly connected to each other. You can disable sources and modify information including location and point of contact.

Depending on the status of your locations, you may need to disable a source. A disabled source retains all assignments per stocks and products but is not accessed for inventory and orders:

When disabled:

- Inventory Management ignores and does not list the source for shipment or order processing.
- Stocks do not access inventory quantities from the source for aggregated inventory totals.
- Order shipments cannot be assigned to disabled locations.

You cannot disable the Default Source. Magento uses this source for all new, imported products, for bundle products, and for third party system support. You can enable or disable custom sources at any time.

This option is helpful for the following situations:

- **Adding a new store or warehouse:** As you open new storefronts or bring new warehouses and shipment locations online, add a source entry to set up product inventory using import and connect to potential stocks.
- **Seasonal shipments:** Holidays can be an extremely busy time of the year. You may want to restrict shipping only from specific shipment locations such as warehouses to keep brick-and-mortar locations well stocked and focused on local shoppers. Or you may add new shipment locations for a limited time to handle higher rates of sales and incoming orders.
- **Closing a location:** When closing a location for movement to new facilities or permanently, disable to stop new shipments from the location.

**To disable a source:**

1. On the Admin sidebar, tap **Stores**. Then under Inventory, choose **Sources**.
2. Locate a source and tap **Edit**.

3. Expand  the **General** section, and set the **Is Enabled** toggle:

Yes

Source is enabled. The quantity adds to Salable Quantity. The source lists with current quantity when shipping orders. The Source Selection Algorithm checks it the source for shipping.

No

Source is disabled. Quantities are not added to Salable Quantities. The sources does not list when shipping orders. Shipping options skip this source.

4. Select **Save and Close**.

## Managing Stock

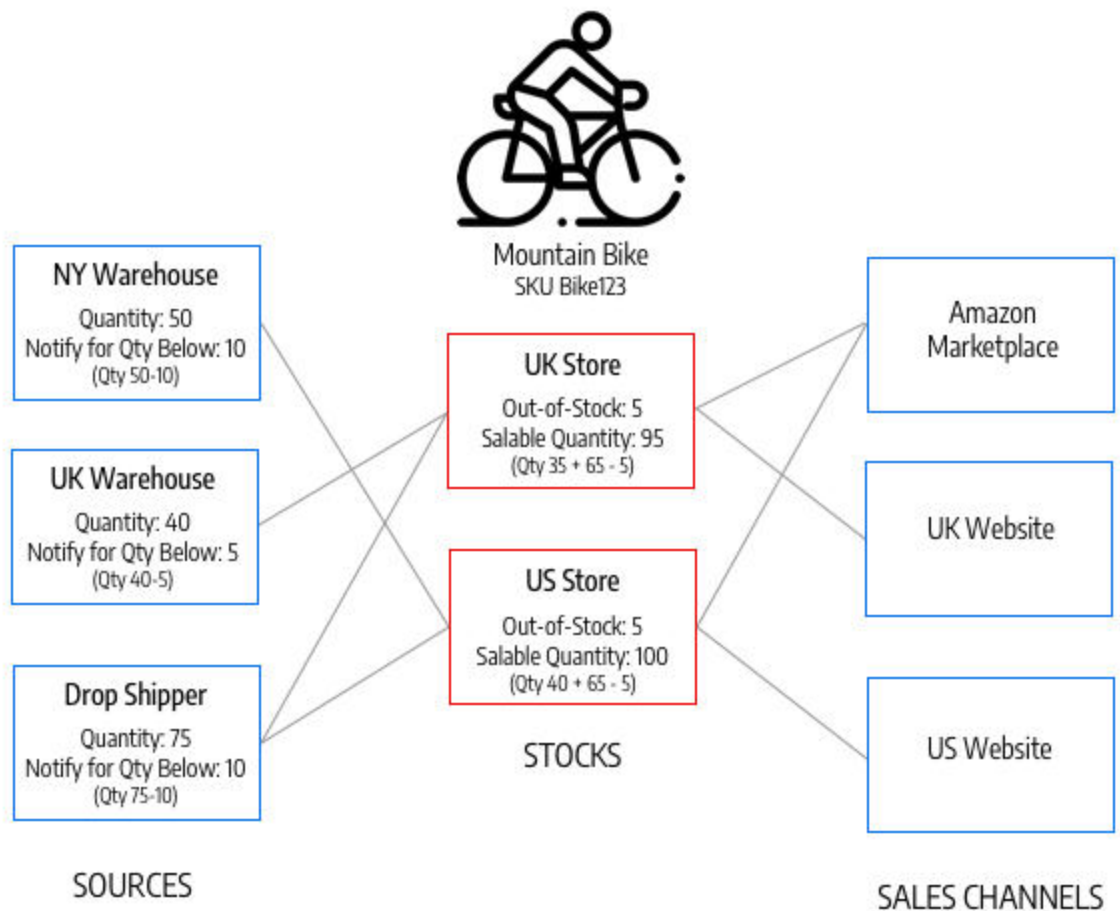
Stock represents a virtual, aggregated inventory of products for sources of your sales channels (currently these are websites). Depending on your site configuration, the stock may be assigned to one or more sales channels. Each sales channel can only have a single stock assigned to it, and a single stock can be assigned to multiple websites. Through the stock, you can modify the prioritization of sources used as orders come through a website.

You start with a Default Stock that cannot be removed or disabled. You can add additional sales channels to the stock only. The only assigned source is Default Source. This stock is used by Single Source Merchants, 3rd party integrations, and imported products.

Sales Channels represent entities selling your inventory. By default, Magento provides your store websites as sales channels. Sales channels can be extended to support additional channels such as B2B customers groups and store views. Each sales channels can only be associated to one Stock.

- **Sales Channel Support** - Sales channels currently include websites out-of-the-box. You can extend sales channels to include custom options like B2B customers groups and store views. Each sales channel can only have a single stock assigned to it. A single stock can be assigned to multiple websites.
- **Map to Sources** - Each stock can have one or more enabled or disabled sources assigned, calculating the virtual aggregated inventory per product.
- **Priority Order Fulfillment** - The out-of-the-box Priority algorithm for the Source Selection Algorithm uses the stock's source list from top-to-bottom when fulfilling orders.

The following diagram helps define how a Stock works in relation to Sources and Sales Channels for a Bicycle Shop merchant.

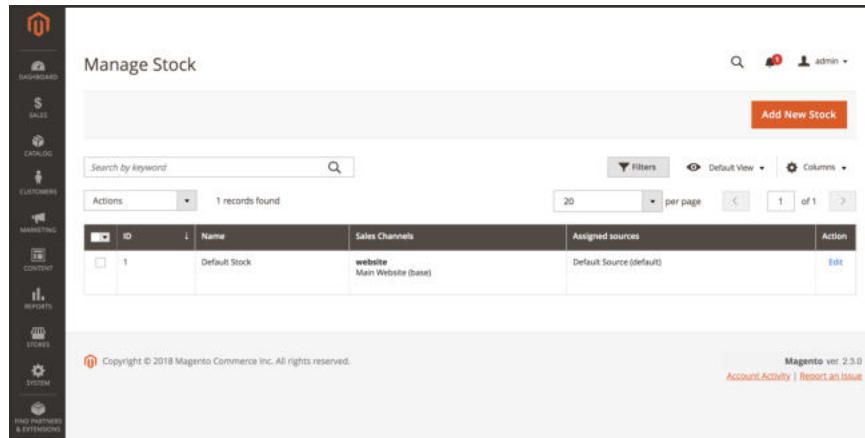


All stores start with a Default Stock. It must remain "Enabled" for the following:

- It is used when importing new products, automatically assigning products to the default source and stock for immediate access to Inventory Management.
- You cannot add additional sources beyond the Default Source to this stock.
- It is required and used by Single Source merchants, Bundle products, and Grouped products.

For Multi Source merchants, create and configure stocks as needed to best fit your stores and order fulfillment. When you assign new stock to a sales channel, any pre-existing stock in that sales channel becomes unassigned.

For a multisite installation, the Default Stock is initially assigned to the **Main Website** and default store.



*Manage Stock*

**Button Bar**

COLUMN	DESCRIPTION
<b>Add New Stock</b>	Opens the New Stock form that is used to enter a new inventory stock for mapping inventory to sales channel.

**Manage Stock Column Descriptions**

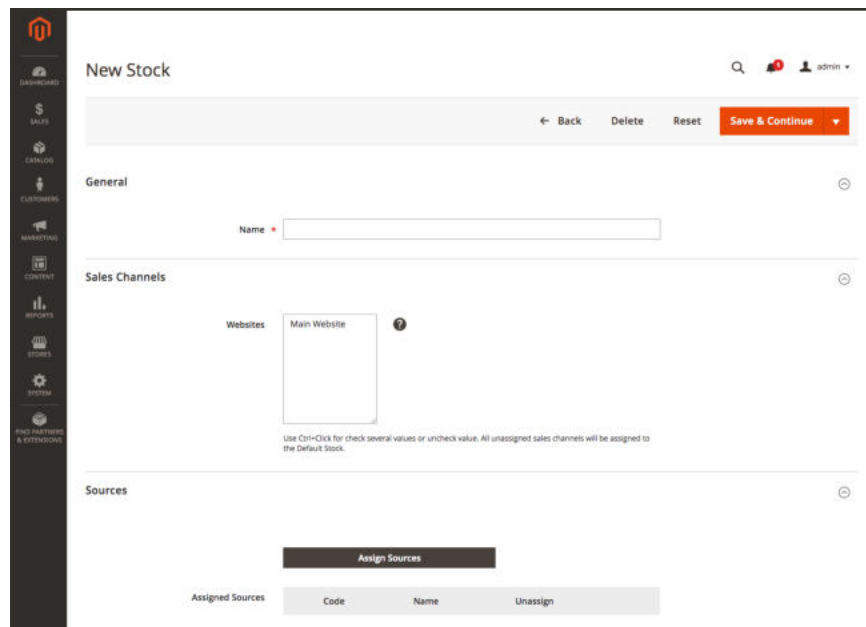
COLUMN	DESCRIPTION		
ID	Unique, numeric ID generated for the stock entry.		
Name	Unique name that identifies the inventory stock.		
Sales Channels	Defines the <b>scope</b> of the stock by assigning the stock to specific website(s) as “sales channels.”		
Assigned sources	Sources assigned to the stock that supply all product quantities.		
Action	<table border="0"> <tr> <td>Edit</td> <td>Opens the inventory stock record in edit mode.</td> </tr> </table>	Edit	Opens the inventory stock record in edit mode.
Edit	Opens the inventory stock record in edit mode.		

## Adding a New Stock

Stocks map your sources to sales channels (or websites), providing a direct link to salable quantities and product inventories.


When creating a custom stock, you assign websites and sources. Sources can include enabled and disabled sources. For example, you may add a new warehouse to your stock, preparing to open the location for managing inventory and completing shipments.

After adding sources, you need to prioritize the order for the sources from top (first) to bottom (last). This order affects recommendations during order shipment.




*New Stock*

### To add new stock:

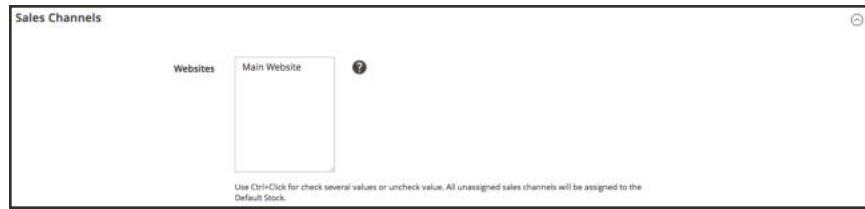
1. On the Admin sidebar, tap **Stores**. Then under **Inventory**, choose **Stock**.
2. Tap **Add New Stock**.
3. Expand  the **General** section. Then, enter a unique **Name** to identify the new stock.



*General*

4. Expand  the **Sales Channels** section. Then, select the **Websites** where this stock is available. For a multisite installation, hold the Ctrl key and tap each website.

If you select a website or sales channel assigned to another stock, it will be unassigned from that stock. Any Sales Channels not assigned to a custom stock are assigned to the Default Stock.



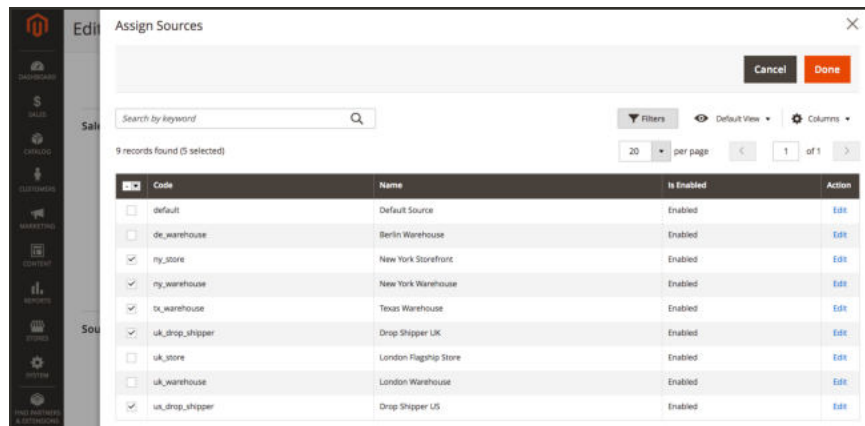
*Sales Channels*

5. Expand  the **Sources** section. For any stock other than the default, do the following:
  - a. Tap **Assign Sources**.



*Assigned Sources*

- b. Select checkboxes for all sources you want to assign to the stock.
  - c. Tap **Done**. The added sources display in Assigned Sources.



*Assign Sources to Stock*

6. Use  to drag and drop the sources into a priority from top (first) to bottom (last). This order is important when shipping orders.



Assign Sources			
Assigned Sources	Code	Name	Unassign
	uk_warehouse	London Warehouse	
	uk_drop_shipper	Drop Shipper UK	
	de_warehouse	Berlin Warehouse	
	uk_store	London Flagship Store	
	us_drop_shipper	Drop Shipper US	


Assigned Sources Example

- On the **Save** ( ) menu, choose **Save & Close**.

### Field Descriptions

FIELD	DESCRIPTION
<b>GENERAL</b>	
Name	Name for the stock. For example: UK Stock, US Stock
<b>SALES CHANNELS</b>	
Websites	<p>Defines the <b>scope</b> of the stock by assigning the stock to specific website(s) as “sales channels.”</p> <p>Select one or more websites per stock. Each website can only be assigned to one stock.</p>
<b>SOURCES</b>	
<b>Assign Sources</b>	<p>Assigns inventory sources to this stock.</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;">                     Custom sources cannot be assigned to Default Stock.                 </div>
Assigned Sources	<p>List of assigned sources. Drag and drop the sources using  into a prioritized order for order fulfillment and shipping.</p> <p>Code                      Unique code id for the source.</p> <p>Name                      Name description for the source.</p>

### Field Descriptions (cont.)

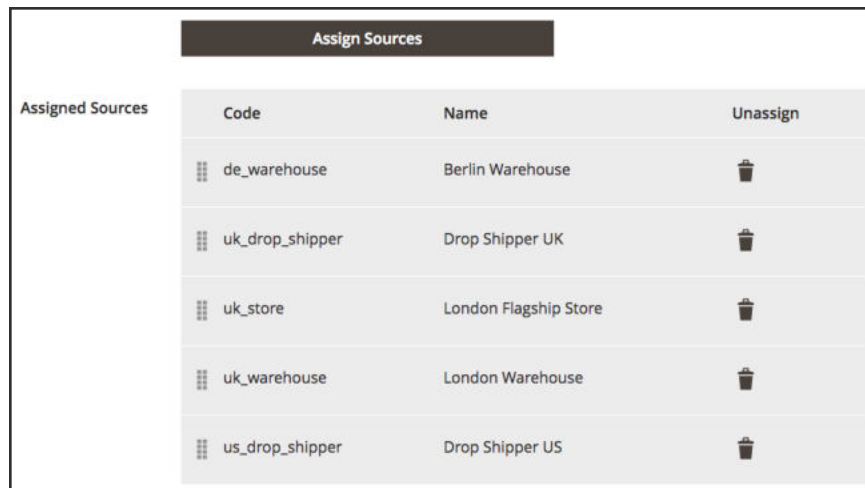
FIELD	DESCRIPTION
Unassign	Remove the assigned source from the stock using  .











## Prioritizing Sources for a Stock

After adding **sources** to the **stock**, arrange those sources from top-to-bottom in priority for fulfilling orders. The Source Selection Algorithm (SSA) provides an algorithm Priority using this order when determining shipment and inventory deductions.

The source priority on stocks does not influence assigned sources when editing product inventories.

In this example, the UK Stock has sources assigned out of order for a store and two warehouses in London and a warehouse in Berlin.








Assign Sources			
Assigned Sources	Code	Name	Unassign
	de_warehouse	Berlin Warehouse	
	uk_drop_shipper	Drop Shipper UK	
	uk_store	London Flagship Store	
	uk_warehouse	London Warehouse	
	us_drop_shipper	Drop Shipper US	

*Source order before prioritization*

The merchant prefers to have shipments prioritized from the larger Berlin warehouse, then the London warehouse, the London overflow location, and finally the storefront in London. To reorder, the entries are dragged and dropped in order.

Use  to drag and drop the sources into a priority from top (first) to bottom (last). This order is important when shipping orders. SSA recommends shipments based on the order of sources

Assign Sources			
Assigned Sources	Code	Name	Unassign
	uk_warehouse	London Warehouse	
	uk_drop_shipper	Drop Shipper UK	
	de_warehouse	Berlin Warehouse	
	uk_store	London Flagship Store	
	us_drop_shipper	Drop Shipper US	

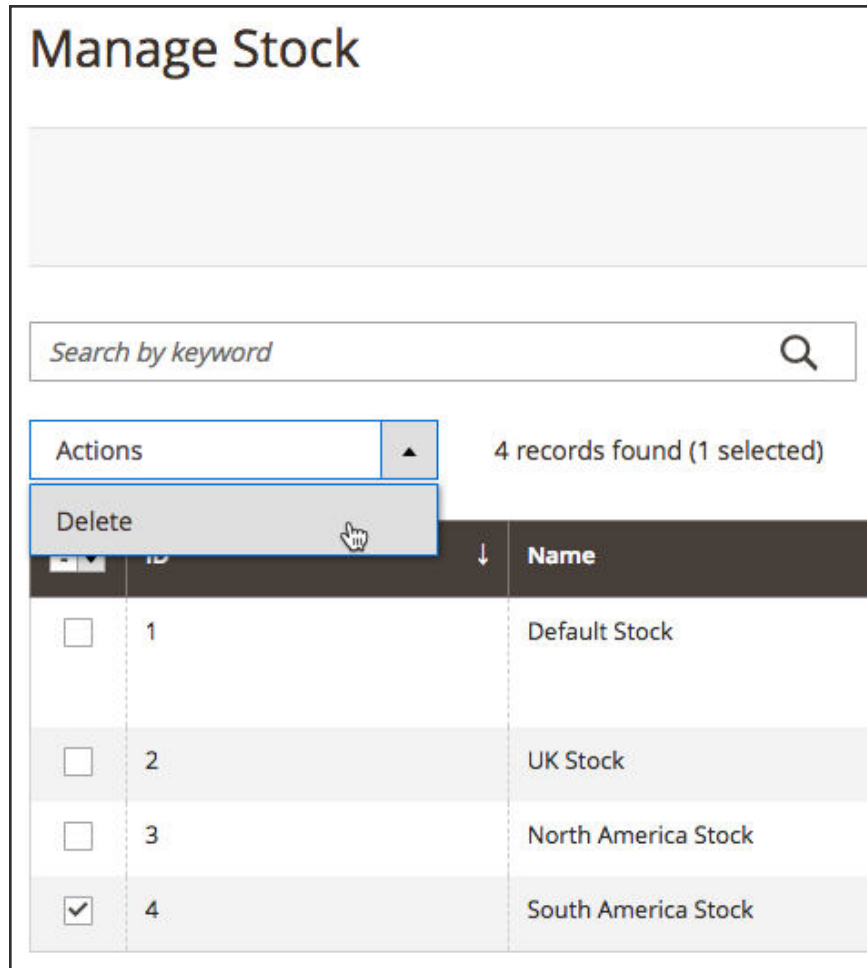
*Source order after prioritization*

## Deleting Stocks

When you delete the stock, all assigned web sites are assigned to the Default Stock. We recommend reassigning websites to other stocks prior to deletion.

**Important:** Deleting a **stock** can affect salable quantities and unprocessed orders for a sales channel. If you continue using a sales channel, please add the sales channel to another existing or new stock.

1. On the Admin sidebar, tap **Stores**. Then under Inventory, choose **Stocks**.
2. Select one or more stocks you want to delete. Browse or search and select checkboxes for stocks you want to delete.
3. From the Actions drop-down menu, select **Delete**.



Select Delete from the Actions menu

4. A verification displays. Tap **OK**. The stock is deleted and any assigned sales channels are unmapped.



Stock delete verification message

## Managing Inventory Quantities

The following information details how to assign sources and quantities for new products, or changing to existing products.

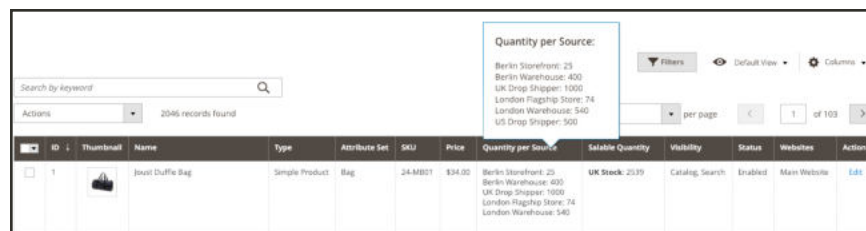
When creating new products, assign sources and quantities during product creation. See [Product Types](#) documentation for full instructions. These pages includes Single and Multi Source information for sources and quantities per source.

When first accessing an upgraded Magento with Inventory Management, all products and quantities are assigned to the Default Source. When importing new products via .csv file, they are also assigned to the Default Source.

Single and Multi Source merchants can update sources, inventory quantities, and thresholds per product or in bulk.

- Single Source merchants can update product quantities for the Default Source; this is the total amount of products available for sale.
- Multi Source merchants can assign multiple sources and quantities per product for each location (warehouses, stores, drop shippers, etc). We recommend having Sources added prior to setting product inventory amounts.

When adding sources and quantities to your products, you can view the amounts through the Product Grid. If you have a high number of sources, hover the Quantity per Source to see the full, scrollable list of sources with current quantities.



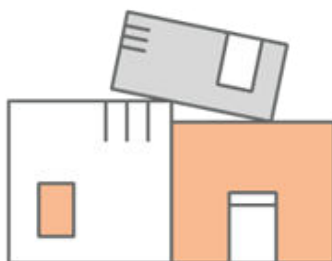
*Product Quantities per Source*

You have the following options to assign inventory to products.



### Assigning Sources per Product

Assign sources manually per product in your catalog.



### Assigning Quantities per Product

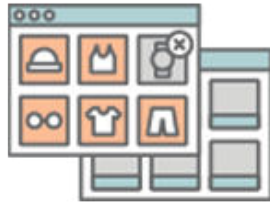
Add on-hand inventory amounts to your products per source. This information is specific for Multi Source merchants.



### Bulk Assigning Sources

---

Assign sources to selected products as a mass action.



### Bulk Unassigning Sources

---

Unassign sources from selected products as a mass action. We recommend using the Transfer Inventory to Source option if you need to transfer inventory and remove the source.



### Transferring Inventory to Source

---

Mass transfer all inventory from one origin source to a destination source.



### Importing and Exporting Quantities

---

Use import and export features to update multiple product SKUs with sources and inventory quantities.

## Assigning Sources per Product

Before modifying quantities and settings, you need to assign **sources** to the products.

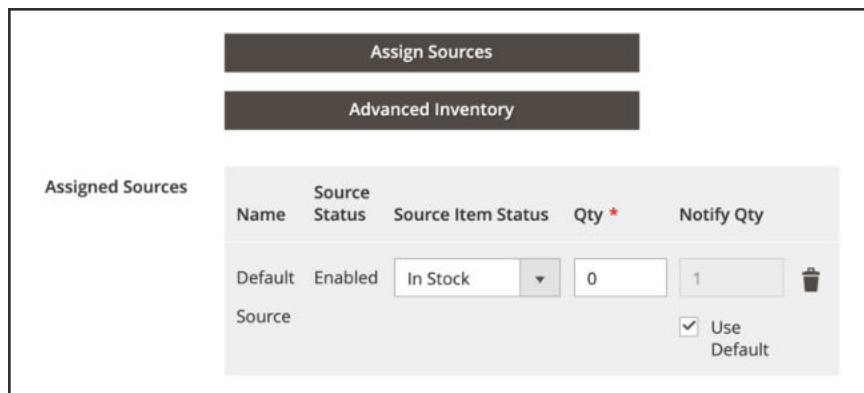
**Important:** Unassigning a source clears all quantity data. Reassigning a source with quantity data can potentially cause issues with pending orders with reservations and affect stock salable quantity counts. Keep in mind, all product quantities in shopping carts and submitted orders have associated reservations. If you unassign the only sources providing those products to the stock, orders cannot be completed and shipped for that sales channel.

**Recommendation:** We recommend processing all pending orders and sending shipments prior to removing sources or transferring all inventory.

**To assign sources:**

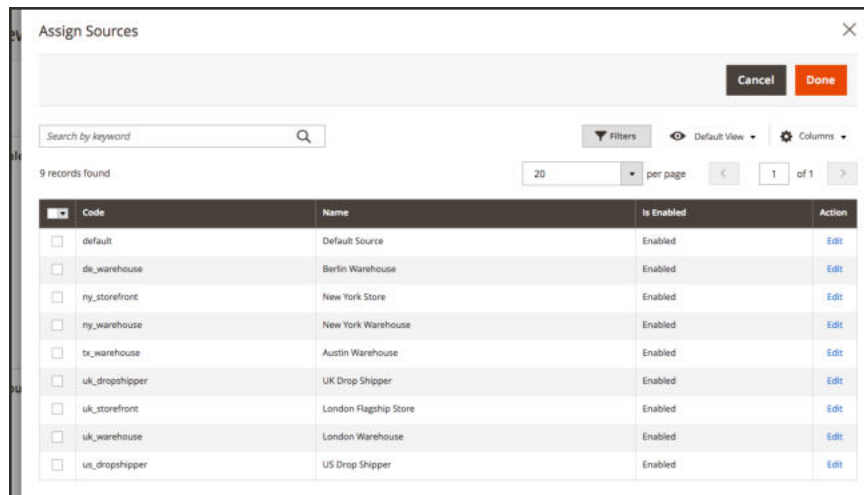
1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Locate and open a product in **Edit** mode.
3. Expand ☺ the **Sources** section. This section allows you to modify the source, update inventory quantities, and more.

Currently, only Simple, Configurable, Virtual, Downloadable, and Grouped products support multiple sources. Bundle products can be created and managed with only the Default Source and Stock.




*Product Sources section*

4. To add a source, tap **Assign Sources**. The Assign Sources page displays.
5. Browse or search for a source you want to add. Select the checkbox next to the source(s) you want to add for the product.



*Assign sources to the product*

6. Tap **Done** to add the sources.
7. Do one of the following to save:
  - Tap **Save**.
  - On the **Save** (  ) menu, choose **Save & Close**.

After assigning sources, update the **inventory quantity** for each product source.


## Assigning Quantities per Product

After adding **sources**, update the inventory quantities for your product. These values track the on-hand, available stock amounts.

To hide a source's inventory from shipments without removing the source, select Out of Stock for Source Item Status. The SSA and shipment options only access sources listed as In Stock with available inventory quantity.

All updated quantities and sources display in the product grid.

### To update quantities:

1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Locate and open a product in **Edit** mode.
3. Expand  the **Sources** section, and do the following:
  - a. For a Source, Set **Source Status** to "In Stock". To see the source code, hover over the name.
  - b. Enter an amount update the **Qty** for on-hand stock.
  - c. To set a notification for inventory quantities, do one of the following:

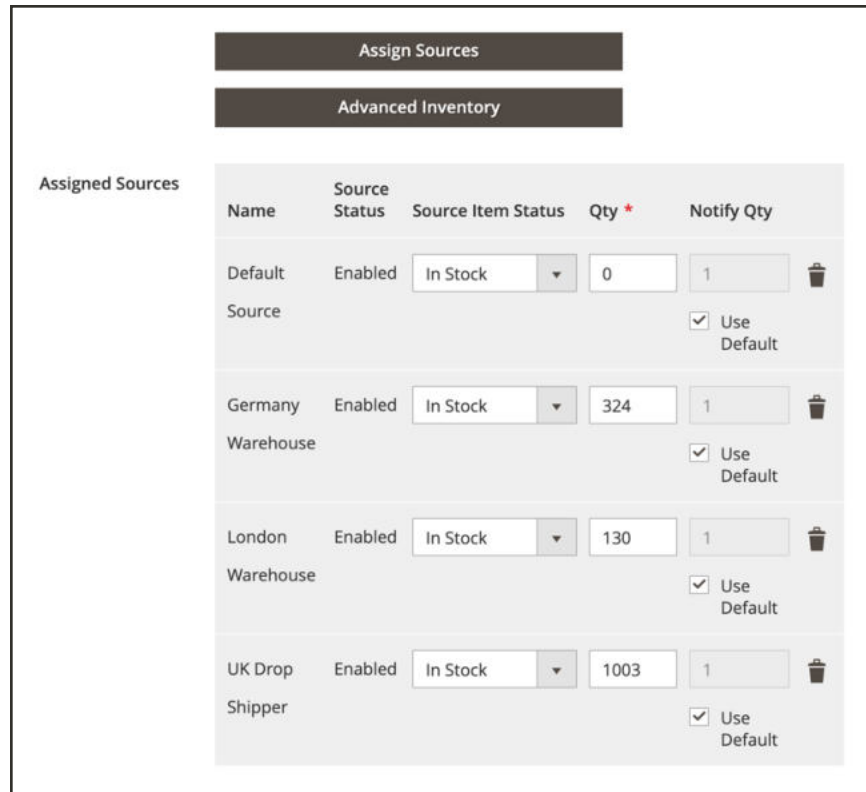


Custom Notify Quantity

Clear the **Use Default** checkbox and enter an amount in **Notify Qty**.

Default Notify Quantity

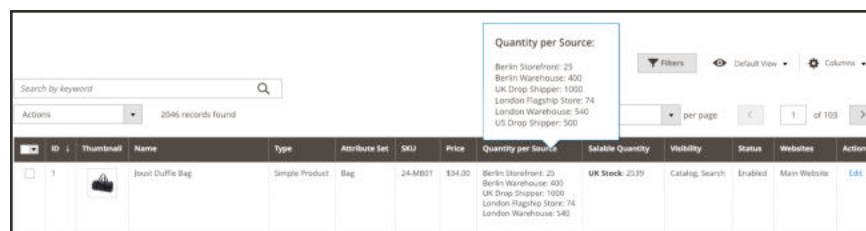
Select the **Use Default** checkbox. Magento checks and uses the setting in Advanced Inventory or global Store configuration.



Update Product Quantities per Source

- Do one of the following to save:
  - Tap **Save**.
  - On the **Save ( )** menu, choose **Save & Close**.

The Product Grid updates with a list of all sources and related quantities. For products with more than five assigned sources, hover over the Quantity per Source column to see the full list.



Product Quantities per Source

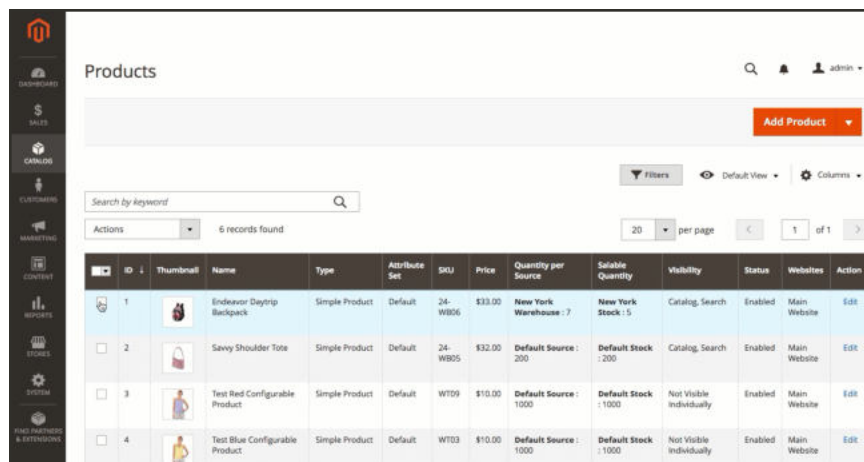
## Bulk Assigning Sources

Use the Assign Sources tool to add one or more sources to your products. The tool helps when creating and assigning custom sources to your Default Stock or custom stocks and preparing new locations and inventory.

After adding new custom sources, you can add **inventory quantities per product** or for multiple products through the Admin or using the **import feature**.

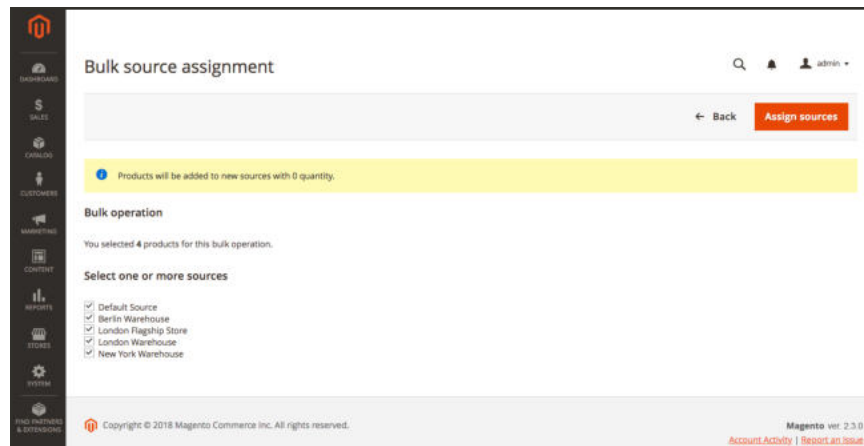
### To update quantities:

1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Select the products you want to modify sources. Browse or search to find the products and select those checkboxes.
3. Tap the **Actions** drop-down menu, and choose Assign Inventory Source. Tap **OK** to verify.



*Select products to add sources*

4. Select checkboxes for all sources you want to add to the products.
5. Tap **Assign Sources**.



*Select products to add sources*

The sources are added to the products with an inventory quantity of 0. You can add **inventory quantities** per source.

## Bulk Unassigning Sources

When unassigning a source from a product, you are indicating the product will no longer be stocked at that location. This process will completely clear all inventory data for source currently assigned to the product. If you need to move the existing inventory to a new location, consider using the Transfer inventory option.

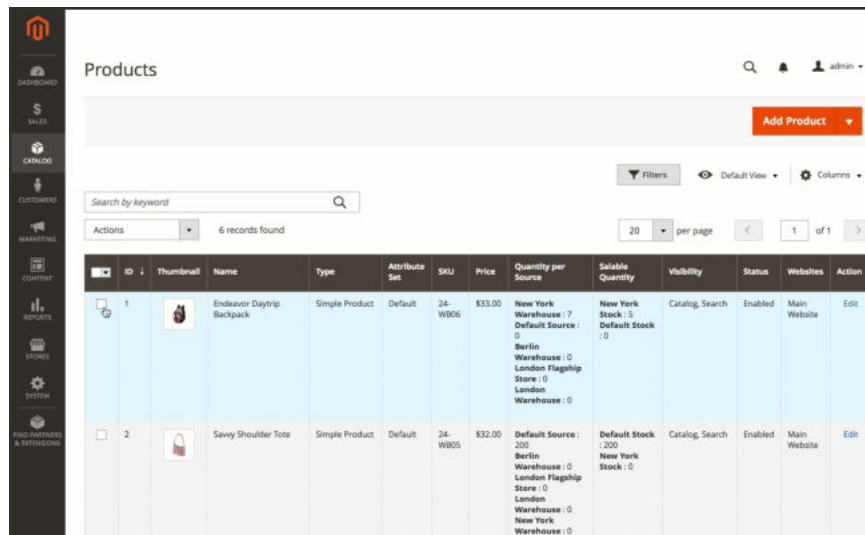
**Important:** Unassigning a source clears all quantity data. Reassigning a source with quantity data can potentially cause issues with pending orders with reservations and affect stock salable quantity counts. Keep in mind, all product quantities in shopping carts and submitted orders have associated reservations. If you unassign the only sources providing those products to the stock, orders cannot be completed and shipped for that sales channel.

**Recommendation:** We recommend processing all pending orders and sending shipments prior to removing sources or transferring all inventory.

We strongly recommend completing all orders and shipments for those products prior to removing the source.

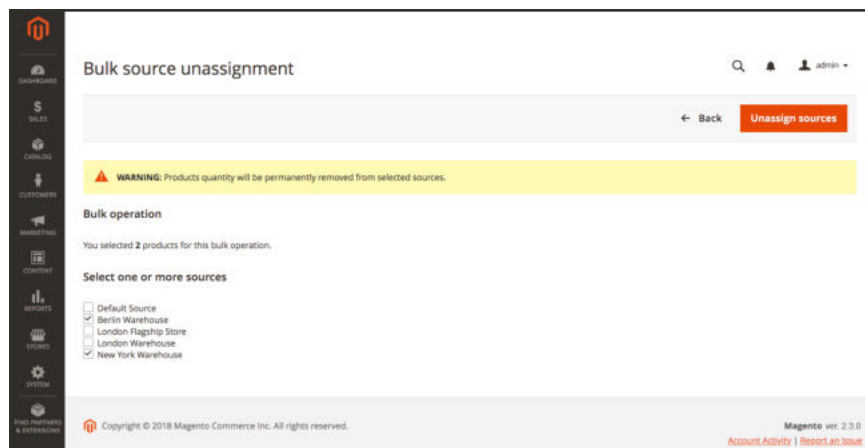
### To update quantities:

1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Select the products you want to modify sources. Browse or search to find the products and select those checkboxes.
3. Tap the **Actions** drop-down menu, and choose Unassign Inventory Source. Tap **OK** to verify.



Select products to remove sources

4. Select the source you want to remove from the products.
5. Tap **Unassign Sources**. An alert displays that unassigning will remove all specific source and quantity data from the product.
6. To complete, tap **Unassign Sources**.



Remove sources from selected products

## Transferring Inventory to Source

Depending on your business needs and status of location, Multi Source merchants may need to transfer product inventory from one source location to another. For example, you may be closing a warehouse location or no longer ship specific products from a location, moving all operations for those products to a new location.

This option allows you to select one or more products, the origin source to transfer inventory, and the destination source to receive quantities:

- Inventory quantities, Source Item Status (In Stock/Out of Stock), and the Notify Quantity for the selected source are moved per product.
- If a product does not have that source, it is skipped.
- All product inventory for the source is moved. You cannot transfer a partial quantity.

**Important:** If the origin and destination sources are in different stocks, this will affect the aggregated Salable Quantity and reservations for in-progress orders.

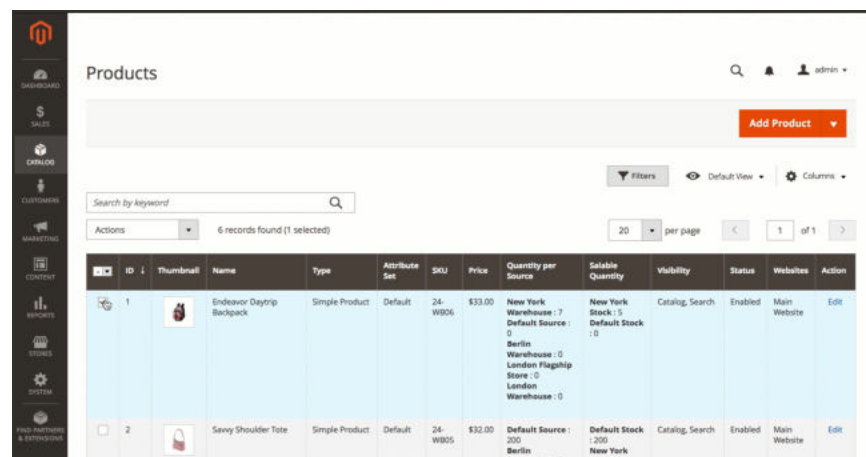
You have an option to also unassign the source when transferring inventory quantities.

**Important:** Unassigning a source clears all quantity data. Reassigning a source with quantity data can potentially cause issues with pending orders with reservations and affect stock salable quantity counts. Keep in mind, all product quantities in shopping carts and submitted orders have associated reservations. If you unassign the only sources providing those products to the stock, orders cannot be completed and shipped for that sales channel.

**Recommendation:** We recommend processing all pending orders and sending shipments prior to removing sources or transferring all inventory.

### To transfer inventory to source:

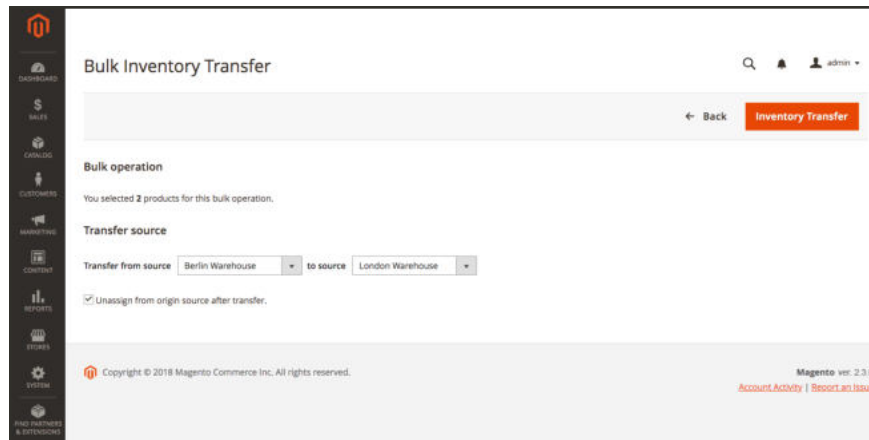
1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Select the products you want to modify sources. Browse or search to find products and select checkboxes for transfer.
3. Tap the **Actions** drop-down menu, and choose Transfer Inventory to Source. Tap **OK** to verify.



Select products to transfer inventory

4. Select the origin source to transfer products to a new destination. Tap **Continue**.
5. Select the destination source to transfer products to a new destination.

- To remove the source from the products, select the optional checkbox **Unassign from origin source after transfer**.



*Select origin and destination for transfer*

- Tap **Inventory Transfer**. All product quantities are deducted from the origin source and added to the destination source. The Quantity and Salable Quantity automatically update.

## Importing and Exporting Inventory

For catalogs with a large amount of products, use the Import and Export features of Magento with expanded Inventory Management options to update sources and quantities by SKU. With these options, you can add new sources and update inventory quantities for all or a specific source. For example, you can export products for a source in Germany without affecting product information for sources in France, England, or the US.

- Magento automatically assigns the Default Source to your products when upgrading Magento or importing new products. If you import products with a custom source assigned, the Default Source will still be added with a quantity of 0. To update sources and quantities, use these import instructions.
- Single Source merchants use import to update only product quantities. All existing and added products are assigned to the Default Source.
- Multi Source merchants use import to add multiple sources and quantities per row per SKU.

To import updates, first export a CSV file for a specific or all sources. Edit the CSV file and add a row per SKU for each source and quantity. You need the source's code when adding a new source and adding quantities of stock. You cannot add or update stocks using import-export features.

### CSV file content

The export-import file includes the following information according to source:

- `source_code`: The code for sources in Magento. You will see a row for each source and SKU.
- `sku`: The SKU for the product in Magento. The SKU must match a product in your store to properly update Inventory Management data.
- `status`: 0 for Out of Stock. 1 for In Stock. This value must be 1 to purchase stock from this source.
- `quantity`: The total amount of inventory available for this SKU and source.

Use this option to quickly update multiple products and assigned sources to update and correct any inaccuracies in inventory records rather than one at a time through the application interface. For a base file, export first and update as needed.

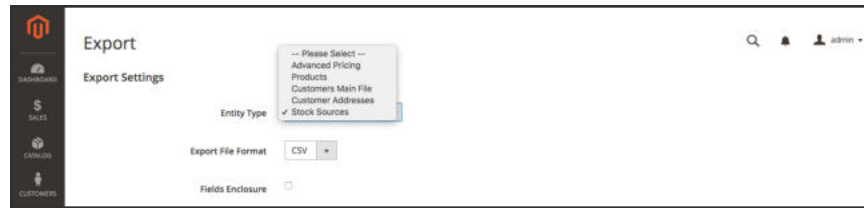
source_code	sku	status	quantity
default	testSimpleProduct	1	45
default	testSimpleProduct2	1	245
default	testConfigProduct-red	1	1000
default	testConfigProduct-blue	1	1000
default	testConfigProduct-green	1	1000
NY	testSimpleProduct2	1	500
TX	testSimpleProduct2	1	375
NY	testSimpleProduct	1	125
TX	testSimpleProduct	1	200

*Example CSV file for Import - Export Inventory Data*

### To export product data for all sources:

1. On the Admin sidebar, tap **System**. Under Data Transfer, choose **Export**.
2. From the **Entity Type** drop-down menu, select **Stock Sources**. The export only extracts data for products with a SKU.
3. Tap **Continue**. The file generates and downloads to open and edit.

After updating inventory amounts and product data, import the file back into Magento.

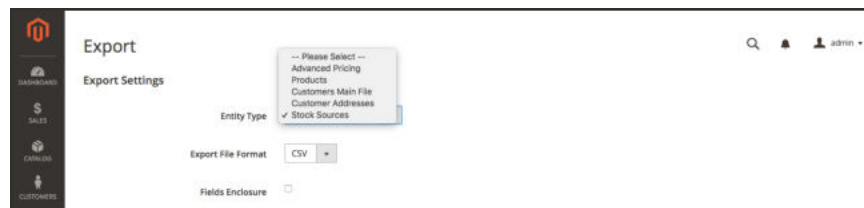


*Export Stock Sources for product data and sources*

### To export product data for a specific source:

1. On the Admin sidebar, tap **System**. Under Data Transfer, choose **Export**.
2. From the **Entity Type** drop-down menu, select **Stock Sources**. The export only extracts data for products with a SKU.
3. To filter the exported products for a specific source, scroll to the **Entity Attributes**. For **source\_code**, enter the code for the source in the filter field.
4. Tap **Continue**. The file generates and downloads to open and edit.

After updating inventory amounts and product data, import the file back into Magento.



*Export Stock Sources for product data and sources*

### To import product data:

1. On the Admin sidebar, tap **System**. Under Data Transfer, choose **Import**.
2. From the Entity Type drop-down menu, select **Stock Sources**. The export only extracts data for products with a SKU.
3. Select configurations for the Import Behavior.
4. Select the .csv file to import.
5. Tap **Check Data** and complete the import.



*Import product data and sources*

## Managing Orders and Shipments

Inventory Management includes additional features and options for managing inventory quantities through the shipment process. As you review and fulfill shipments, cancel orders, and issue credit memos, product salable and on-hand quantities automatically update.

This information includes specifics for Inventory Management. For additional information, see the [Orders](#) section.

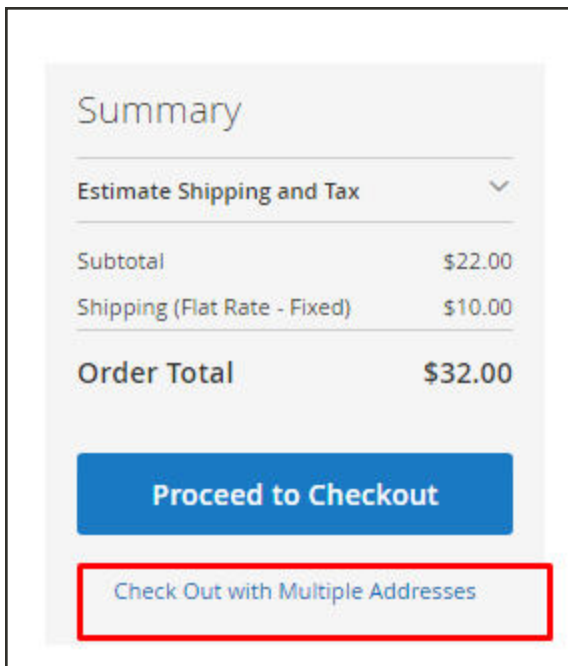
### Orders

Magento supports single orders and multiaddress orders out-of-the-box without additional configurations. As customers or your staff enter orders, Inventory Management tracks inventory using reservations against the salable quantity, deducting from inventory quantity when invoicing and shipping the products.

### Multiaddress Orders

For multiaddress orders, a series of single orders are generated, one for each destination address entered. During checkout, customers select each set of products associated per address during checkout generates as single orders according to the destination address. Each order includes the products associated per address.

Magento manages inventory for these multiaddress orders exactly like single orders, allowing for Source Selection Algorithm recommendations or overrides during shipment, partial shipments, canceling orders, and refunding with stock updates.



*Multiaddress at Checkout*

**Refunds**

When entering a **credit memo** to issue a refund, you have an option to return the product quantity to the deducted source. The order information includes the inventory source that shipped the product. We recommend awarding the returned product quantity through a credit memo when you receive the returned product.

Items to Refund								
Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Endeavor Daytrip Backpack	\$33.00	Ordered 3	<input checked="" type="checkbox"/>	<input type="text" value="3"/>	\$99.00	\$0.00	\$0.00	\$99.00
SKU: backpack		Invoiced 3						
		Shipped 3						

*Items to Refund with Return to Stock Selected*

**Cancel Unshipped Orders**

If an order has not been shipped and is canceled (in full or partial), Inventory Management automatically returns the product stock to the salable quantity. Until invoice and shipping, purchased products are reserved against the salable quantity, not deducted from the actual quantity. Invoicing and shipping converts the reservation to an inventory deduction.

Behind the scenes, Inventory Management automatically enters a compensation reservation removing the hold on the product quantity. The quantity returns to the aggregated virtual salable quantity.

## Shipments

With Magento Inventory Management enabled, you can send partial or complete shipments from one or more sources to fulfill orders. You control your outgoing inventory for each order, setting the amounts to deduct, sending one or more shipments, and delivering in stock and backorders as inventory is available. For each line item in the order, enter an amount to deduct from the source quantity. Generate a shipment per source as you have inventory stock, until the entire order is fulfilled.

### Partial Shipments

For Multi Source merchants, Magento generates a shipment for every source you select. The general workflow allows you to select a source, set the products quantity to deduct to fulfill the order, and proceed to shipment. When complete, create additional shipments for each source until you have fulfilled the order.

Single Source merchants may also send partial shipments to support backorders or balance inventory as orders come in for popular items.

### Recommendations and Source Selection Algorithm

The [Source Selection Algorithm](#) provides recommendations for partial and full shipments. You can access Source Selection Algorithms when creating shipment invoices for an order. Through the Ship page, run the Source Priority or Distance Priority algorithm at any time to determine the best options for matching ordered quantities and available sources. The system supports shipping a complete order from one source, and breaking the order into multiple partial shipments across multiple sources. You can access these options for immediate fulfillment and staggered shipments to send smaller amounts over a period of time.

To complete and ship an order, it must have completed payment and be invoiced. At this time, you can rerun the SSA for recommendations and ship from one or more sources, or override the SSA recommendations with manually set sources and quantities to fulfill shipment.

- We recommend rerunning the SSA to review recommendations for every shipment.
- If you want to change the selections, you can override with manual source deductions.

### Shipments and Reservations

As shipments generate, reservations for products clear and product quantity is deducted. The on-hand quantity per stock updates based on the shipment details. For example, if you send shipments for 10 products from two sources, the quantities for those sources deduct 10 each. The Salable Quantity automatically refreshes for associated stocks, providing customers and staff with the latest product amounts. And the reservations clear completely, no longer counting against the Salable Quantity.

**Developer options:** If you want to review reservations, a series of command line options are available. You can only review reservations through a command line interface. Using CLI commands may require developer assistance. See [Inventory Management CLI Reference](#).

## Creating Shipments with Inventory Management

With Inventory Management, send one or more shipments to fulfill as you have inventory. Repeat these instructions to generate additional shipments as needed, using recommended or manually entered quantities and sources. These instructions detail how Multi Source merchants send shipments. Single Source merchants send shipments without these additional steps. See [Creating a Shipment](#).

When creating shipments, use the Source Selection Algorithm for calculated recommendations. Follow and use these recommendations or set the amounts per source, generating custom shipments. You control your outgoing inventory for each order, setting the amounts to deduct, sending one or more shipments, and delivering in stock and backorders as inventory is available. For each line item in the order, enter an amount to deduct from the source quantity.

You may need to send partial shipments to:

- Fulfill backorders as inventory arrives
- Balance inventory deductions across sources

As you enter shipments, your on-hand inventory quantities deduct entered amounts. In effect, reservations convert to actual quantity deductions.

### To create a shipment:

1. On the Admin sidebar, choose **Sales**. Then, choose **Orders**.
2. Locate the order and open in **View** mode.
3. If the order has been paid and invoiced, and is ready to ship, tap **Ship**.
4. Complete the Source Selection for sending products per source:
  - a. To view shipping recommendations, tap **Source Selection Algorithm** and select an algorithm.

#### Source Priority

Recommends shipments from sources according to the orders of sources assigned to the stock.

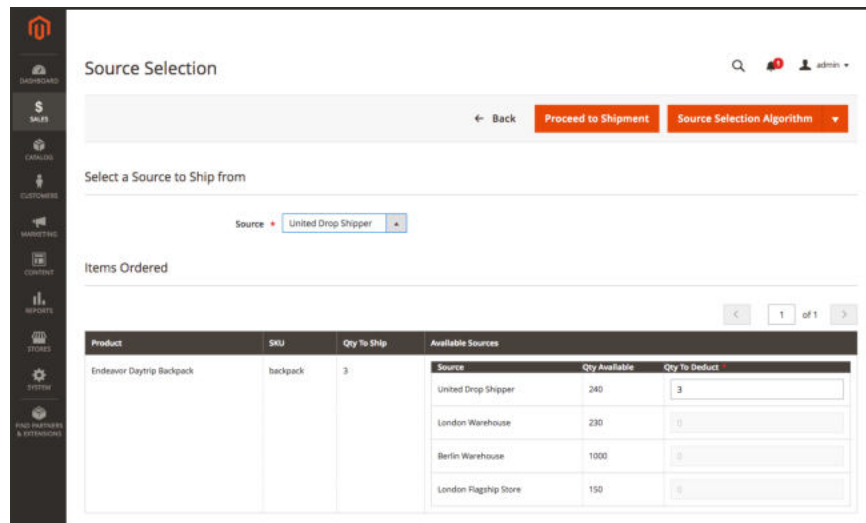
#### Distance Priority

Recommends shipments from sources closest to the shipping address based on physical distance or shortest time to deliver.

**Important:** When using this algorithm for shipping, if routes and data does not return for the selected **Computation mode** (driving, bicycling, or walking) for a shipment, the SSA defaults to using the Source Priority. We recommend also setting the **priority for sources per stock**.

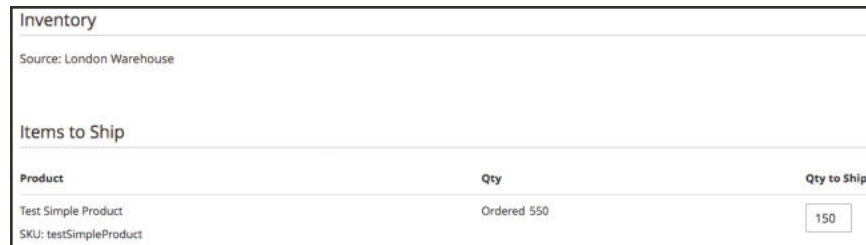
- b. For the **Select a Source to Ship from**, select a source from the drop-down menu to send a shipment.
- c. For each line item, keep the recommended amount or enter a specific amount in the **Qty to Deduct**.

- d. Tap **Proceed to Shipment**.



*Select a Source and enter a Quantity*

- 5. Review the New Shipment page to enter any additional changes. The Inventory section displays the source, products shipping, total ordered quantity, and quantity to ship.



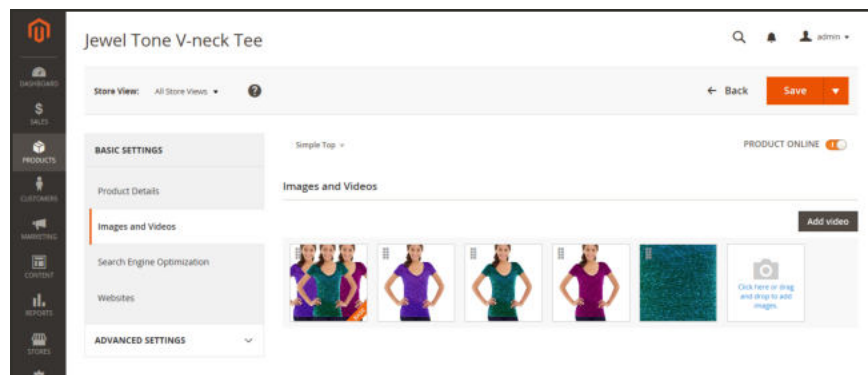
*Inventory details for the Shipment, example Partial Shipment*

- 6. Tap **Submit Shipment** to complete.

## CHAPTER 16:

# Catalog Images and Video

Using high-quality images of consistent proportion gives your catalog a professional look with commercial appeal. If you have a large catalog with several images per product, you can easily have hundreds, if not thousands of product images to manage. Before you get started, establish a naming convention for your image files, and organize them so you can find the originals if you ever need them.



*Product Images*

A single product image is rendered in different sizes throughout the catalog. The display size of the image container on the page is defined in the style sheet of your theme. However, where the image appears in your store is determined by the role that is assigned to the image. The main product image, or “base” image, must be large enough to produce the magnification that is needed for zoom. In addition to the main image, a smaller version of the same image might appear in product listings, or as a thumbnail in the shopping cart. You can upload an image in the largest size that is needed, and let Magento render the sizes needed for each use. The same image can be used for all roles, or a different image can be assigned to each role. By default, the first image that is uploaded is assigned to all three roles.

## Uploading Product Images

For each product, you can upload multiple images, rearrange their order images, and control how each image is used. If you have a large quantity of images to manage, you might prefer to import them as a batch, rather than upload each one individually. To learn more, see [Importing Product Images](#).



If you intend to upload large images for viewing on the Product Details page, you may want to consider setting a maximum pixel size (width and height) and automatically resizing the files prior to upload. We provide an option to enable automatic resizing of significantly larger image files as you upload. To learn more, see [Resizing Product Images](#).

### To manage images:

1. Open the product in edit mode.
2. To work with a specific store view, set the **Store View** chooser in the upper-left corner to the applicable view.
3. Scroll down and expand the **Images and Videos** section. Then, do any of the following:

### Upload an Image


To upload an image, do one of the following:

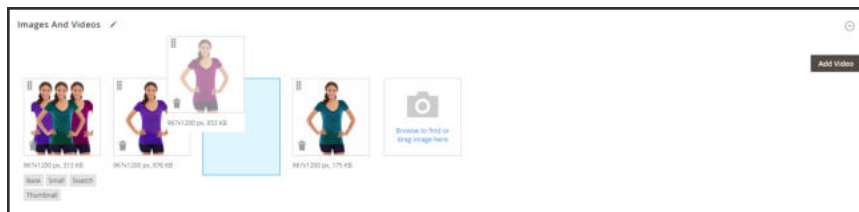
- Drag an image from your desktop, and drop it on the **camera** (  ) tile in the Images box.
- In the Images box, tap the **camera** (  ) tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.



*Upload or Drag and Drop*


### Rearrange Images

To change the order of images in the gallery, tap the **Sort** (  ) icon at the bottom of the image tile. Then, drag the image to a different position in the Images box.

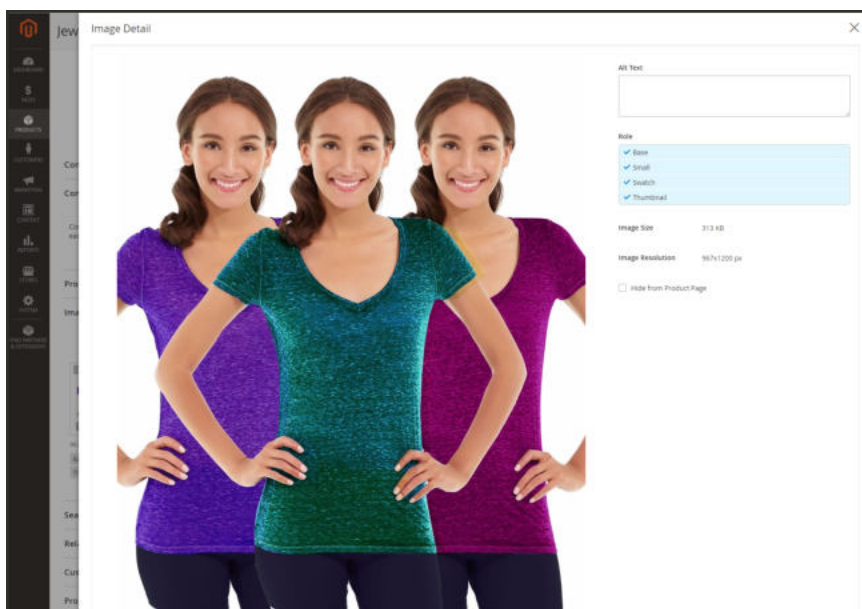


*Change Order*

### Delete an Image

To remove an image from the gallery, tap the **Delete** (  ) icon in the upper-right corner of the image tile. Then, tap **Save**.

4. Tap the image that you want to open in detail view: Then, do any of the following:



*Image Detail View*

### Enter Alt Text

Image Alt text is referenced by screen readers to improve web accessibility, and by search engines when indexing the site. Some browsers display the Alt text on mouseover. Alt text can be several words long, and include carefully selected key words.

In the **Alt Text** box, enter a brief description of the image.

### Assign Roles

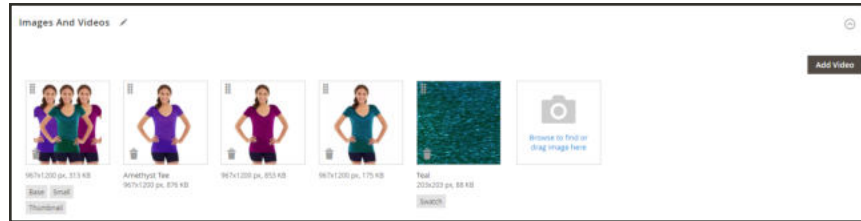
By default, all roles are assigned to the first image that is uploaded to the product. To reassign a role to another image, do the following:

1. Tap an image tile to open the image in detail view.



- In the **Role** box, choose the role that you want to assign to the image.

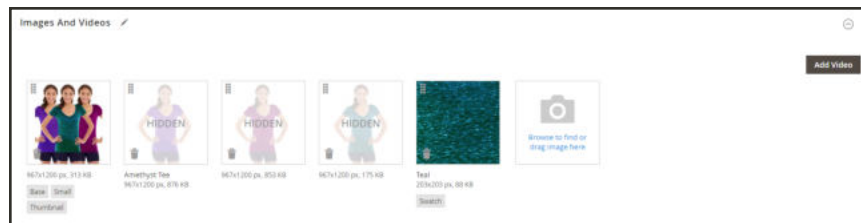
When you return to the Images and Videos section, the currently assigned roles appear below each image.



*Assigned Roles*

### Hide Image

To exclude an image from the thumbnail gallery, mark the **Hidden** checkbox. Then, tap **Save**.



*Hidden Images*

- To close detail view, click the **Close** ( ✕ ) box in the upper-right corner.
- When complete, tap **Save**

## Image Roles

IMAGE ROLE	DESCRIPTION
Thumbnail	Thumbnail images appear in the thumbnail gallery, shopping cart, and in some blocks such as Related Items. Example size: 50 x 50 pixels
Small Image	The small image is used for the product images in listings on category and search results pages, and to display the product images needed for sections such as for Up-sells, Cross-sells, and the New Products List. Example size: 470 x 470 pixels
Base Image	The base image is the main image on the product detail page. Image zoom is activated if you upload an image that is larger image than the image container. Depending on the level of zoom that you want to achieve, the base image should be two or three times the size of the container. Example sizes: 470 x 470 pixels (without Zoom) 1100 x 1100 pixels (with Zoom)
Swatch	A swatch can be used to illustrate the color, pattern, or texture. Example size: 50 x 50 pixels

## Resizing Product Images


When uploading product images, you may add larger images with varying sizes to provide detailed, high quality zooms on the Product Details page. To ensure all images have a similar size and look, we provide an image upload resizing option to ensure all images match a specific pixel size. This option automatically resizes all product images using the configuration settings, which can help with performance of zoom, faster loading of images, and keep a uniform look to your product images.

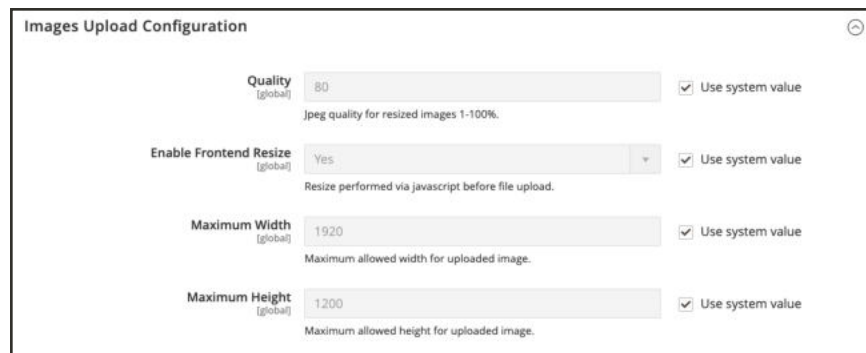
Setting a maximum pixel width and height resizes the image to the physical dimensions by pixel. Magento resizes the image according to the higher amount of either width or height while keeping the proportions. Reducing the quality amount for JPG images reduces the file size.

For example, a 3000 x 2100 pixel JPG at 100% could be a 5mb+ image. Resizing this image would reduce the width to 1920 pixels, keeping proportions, and quality to 80% to provide much smaller file size with high quality.

### To enable image resizing:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. Tap **Advanced**. Then choose **System**.

3. Expand  the Images Upload Configuration section, and configure. TO change default settings, you may need to clear the Use system value checkbox.
  - a. To enable, make sure **Enable Frontend Resize** is set to "Yes".
  - b. Enter a **Quality** setting from 1 to 100%. Recommend 80-90% for a reduced file size and high quality.
  - c. Set the **Maximum Width** in pixels for the image. When the image is resized, it does not exceed this width and retains proportions.
  - d. Set the **Maximum Height** in pixels for the image. When the image is resized, it does not exceed this height and retains proportions.



*Image Upload Configuration*

4. When complete, tap **Save Config**.

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Quality	Global	Determines the JPG quality for the resized image. Lower quality reduces the file size. We recommend 80-90% to help reduce file size with high quality. Default: 80
Enable Frontend Resize	Global	Enable to allow Magento to resize large, oversized images you may upload for the Product Details Page. Magento resizing the image files using JavaScript prior to uploading the file. When the image is resized, it keeps the exact proportions, meeting and not exceeding the largest size for Maximum Width or Maximum Height. Default: Yes

**Field Descriptions (cont.)**

FIELD	SCOPE	DESCRIPTION
Maximum Width	Global	Determines the maximum pixel width for the image. When the image is resized, it does not exceed this width.  Default: 1920
Maximum Height	Global	Determines the maximum pixel height for the image. When the image is resized, it does not exceed this height.  Default: 1200


## Adding Product Video

To add product video, you must first obtain an API Key from your Google account, and enter it in the configuration of your store. Then, you can link to the video from the product.

### Step 1: Get Your YouTube API Key

1. Log in to your Google account, and visit the [Google Developers Console](#). Then, do the following:
  - a. Under Use Google APIs, click **Enable and manage APIs**.
  - b. In the panel on the left choose **Credentials**. Expand the Add Credentials menu, and choose **API key**.
  - c. When prompted to create a new key, choose **Server key**. Enter a name for the key, and tap **Create**.
2. Wait a few moments while the key is generated. Then, copy the key to the clipboard.  
In the next step, you will paste the key into your store's configuration.

### Step 2: Configure Magento

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Product Video** section. Then, paste your **YouTube API key**.



Product Video

YouTube API key

[STORE VIEW]

*Product Video*

4. When complete, click **Save Config**.
5. When prompted, refresh the cache.

### Step 3: Link to the Video

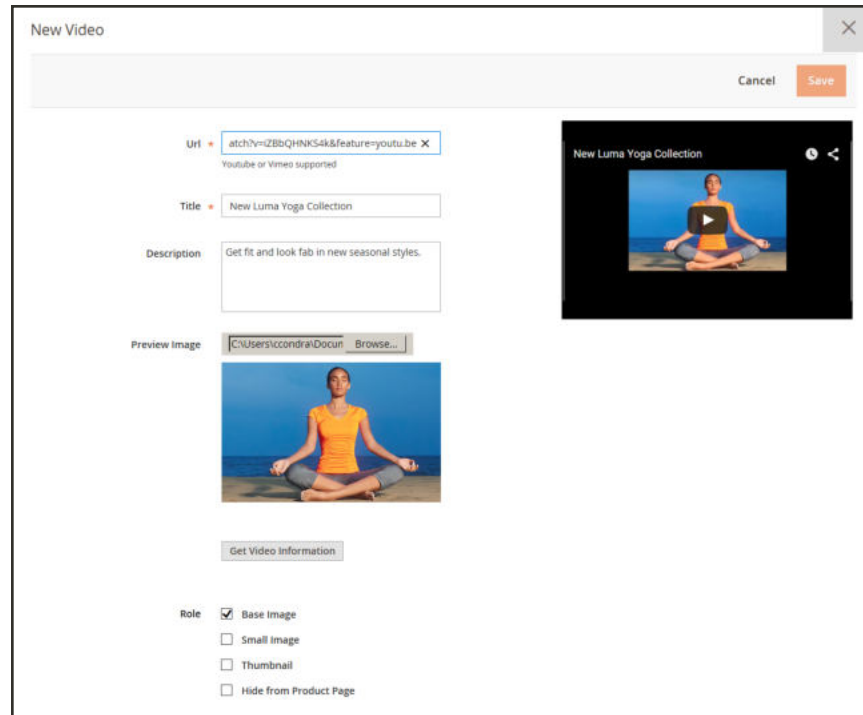
1. Open a product in edit mode. Then in the Images and Video section, tap **Add Video**.

If you haven't yet entered your YouTube API key, tap **OK** to continue. You won't be able to link to a YouTube video, but you can go through the process.



*Add Video*

2. Enter the **URL** of the YouTube or Vimeo video.
3. Enter the **Title** and **Description** of the video.
4. To upload a **Preview Image**, browse to the image and select the file.
5. If you prefer to use the video meta data, tap **Get Video Information**.
6. To determine how the video is used in the store, mark the checkbox of each **Role** that applies:
  - Base Image
  - Small Image
  - Swatch Image
  - Thumbnail
  - Hide from Product Page
7. When complete, tap **Save**.



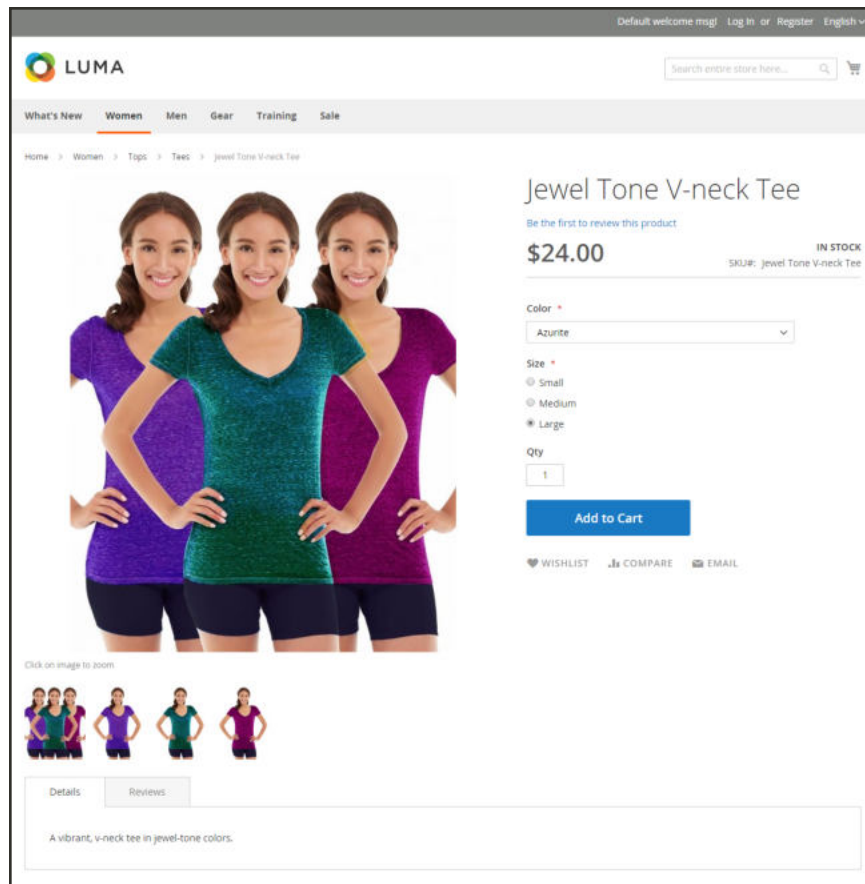
*New Video*

### Field Descriptions

FIELD	DESCRIPTION
URL	The URL of the associated video.
Title	The video title.
Description	The video description.
Preview Image	An uploaded image that is used as a preview of the video in your store.
Get Video Information	Retrieves the video meta data that is stored on the host server. You can use the original data, or update it as needed.
Role	Determines how the preview image is used in your store. Options: Base Image Small Image Thumbnail Swatch Image Hide from Product Page

## Media Gallery

The media gallery on the product page displays multiple images, video, or swatches related to the product. Each thumbnail can show a different view or variation of the product. Click a thumbnail to browse through the gallery, Although the position of the gallery varies by theme, the default position is just below the main image on the product page. For accessibility controls, see [Keyboard Navigation](#).

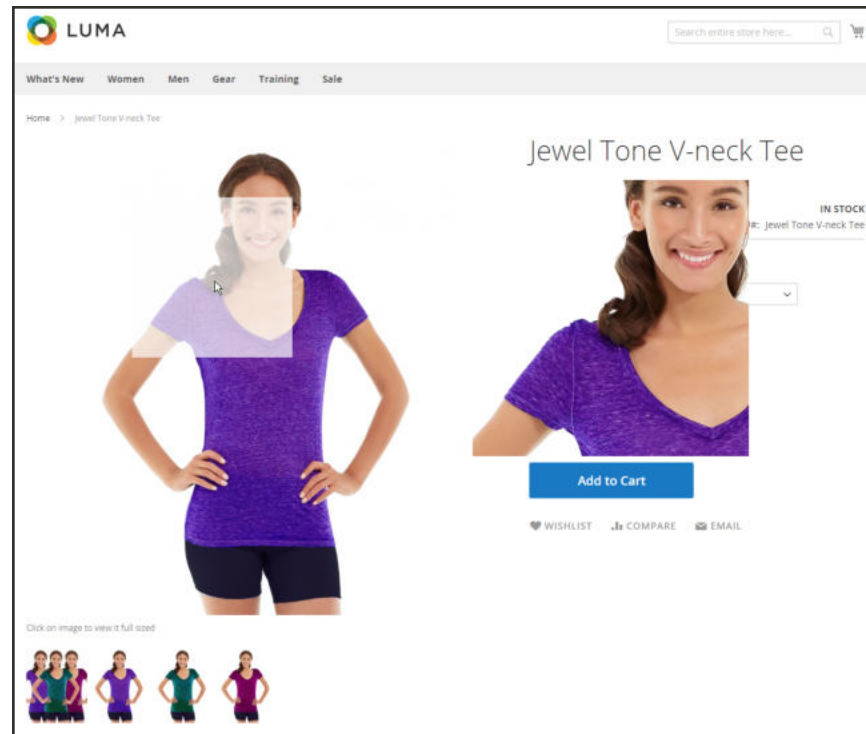


*Media Gallery*



## Image Zoom

Customers can view a magnified portion of the image on mouseover, if the **base image** is large enough to create the zoom effect. When zoom is activated, you can click the main image and move the cursor around to magnify different parts of the image. The magnified selection appears to the right of the image.



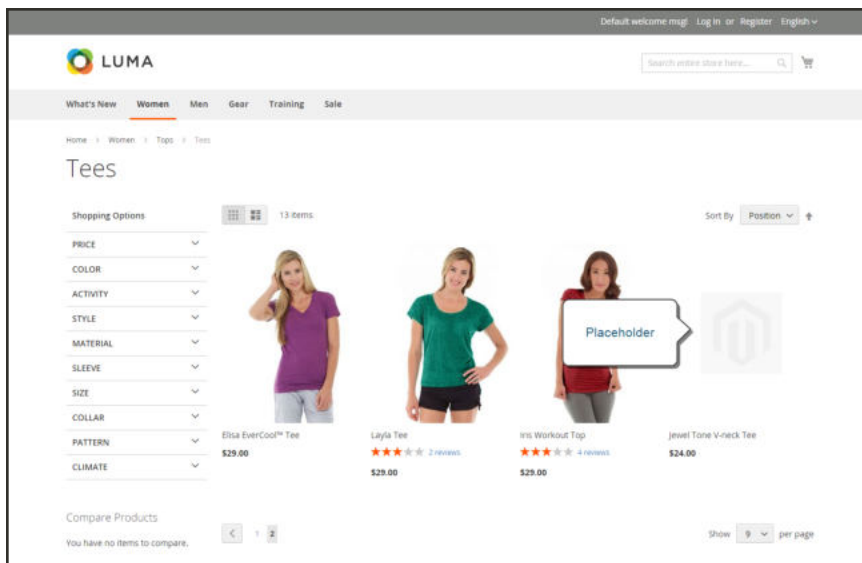
*Image Zoom*

## Light Boxes and Sliders

There are many third-party light boxes and sliders that you can use to enhance the presentation of your product images. Look for extensions in **Magento Marketplace**.


## Placeholders

Magento uses temporary images as placeholders until the permanent product images become available. A different placeholder can be uploaded for each role. The initial placeholder image is the Magento logo, which you can replace with an image of your choice.



*Image Placeholder*

### To upload placeholder images:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, and choose **Catalog**.
3. Expand  the **Product Image Placeholders** section.
4. For each image role, tap **Choose File**. Find the image on your computer and upload the file. You can use the same image for all three roles, or upload a different placeholder image for each role.



*Product Image Placeholders*

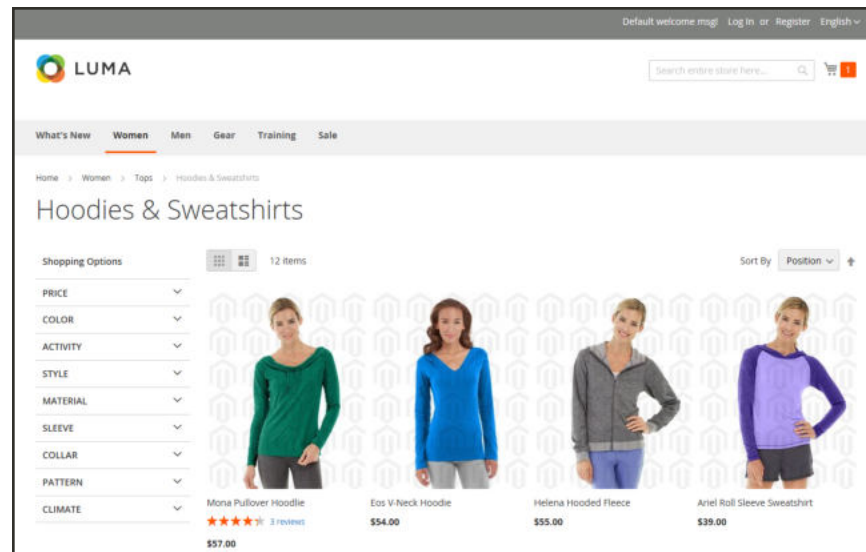
5. When complete, tap **Save**.

## Watermarks

If you go to the expense of creating your own original product images, there is not much you can do to prevent unscrupulous competitors from stealing them with the click of a mouse. However, you can make them a less attractive target by placing a watermark on each image to identify them as your property. A watermark file can be either a JPG (JPEG), GIF, or PNG image. Both GIF and PNG file types support transparent layers, which can be used to give the watermark a transparent background.


The watermark used for the “small” image in the following example is a black logo with a transparent background, and saved as a PNG file with the following settings:

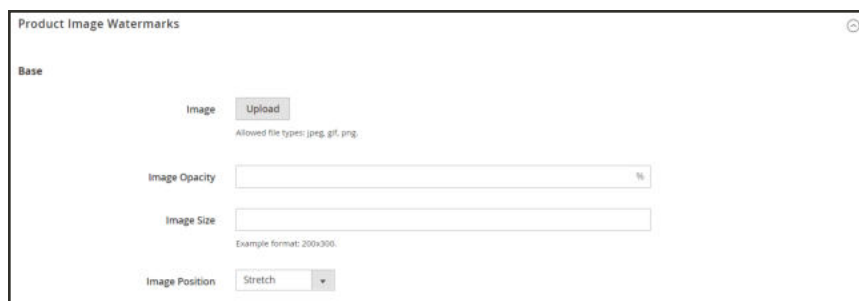
Size: 50x50  
Opacity: 5  
Position: Tile



*Tiled Watermark*

### To add watermarks to product images:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Product Image Watermarks** section.
4. Complete the **Base**, **Thumbnail**, **Small**, and **Swatch Image** image settings as follows. The fields in each section are the same.
  - a. Enter the **Image Opacity** as a percentage. For example: 40
  - b. Enter the **Image Size**, in pixels. For example: 200 x 200
  - c. Tap **Upload**, and choose the image file that you want to use.
  - d. Set **Image Position** to determine where the watermark appears.



*Product Image Watermarks - Base*

5. When complete, tap **Save Config**.
6. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.




*Refresh Cache*

### To restore the default value:

Tap **Use Default Value** (  ).

**To delete a watermark:**

1. In the lower-left corner of the image, tap **Delete** (  ).



*Delete Watermark*

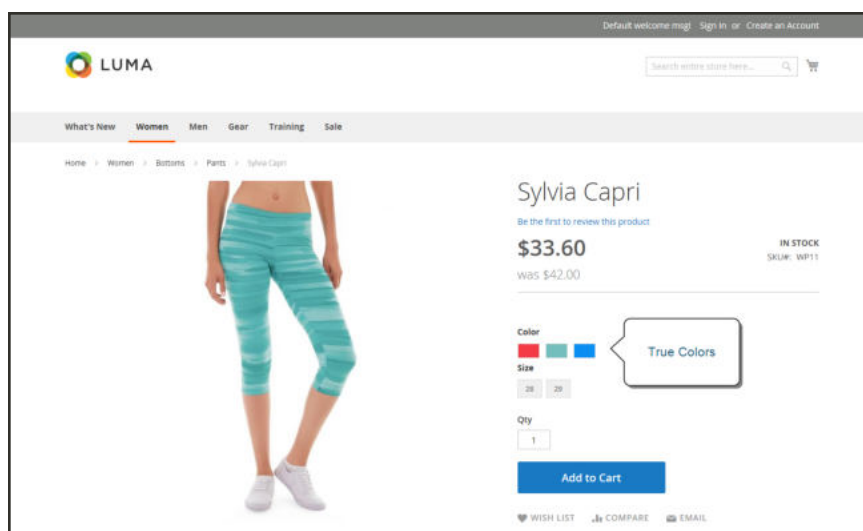
2. Tap **Save Config**.
3. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.

If the watermark image persists in the storefront, return to Cache Management and tap **Flush Magento Cache**.

## Swatches

Customers have high expectations when it comes to color, and it is crucial that product descriptions accurately represent each available color, pattern, or texture. For example, the capris in the illustration below are not simply available in red, green, and blue. Rather, they are available only in very specific shades of red, green, and blue, which are probably unique to this product.

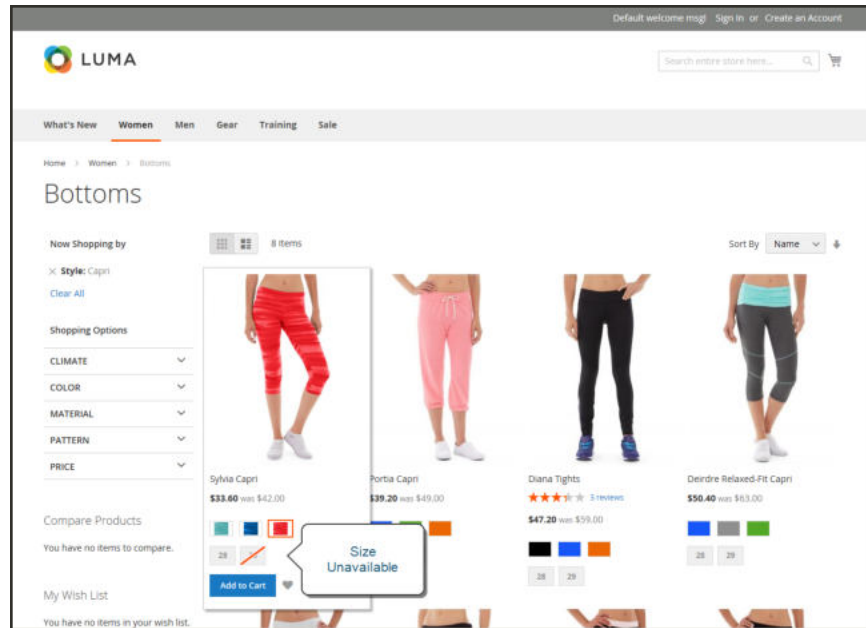
For **configurable products**, color can be indicated by a visual swatch, text swatch, or a drop-down input control. Swatches can be used on the product page, in product listings, and in **layered navigation**. On the product page, swatches are synchronized to display the corresponding product image when the swatch is chosen. When chosen, the corresponding value appears in the input field, and the swatch is outlined as the current selection.



*Swatches on Product Page*

## Text-Based Swatches

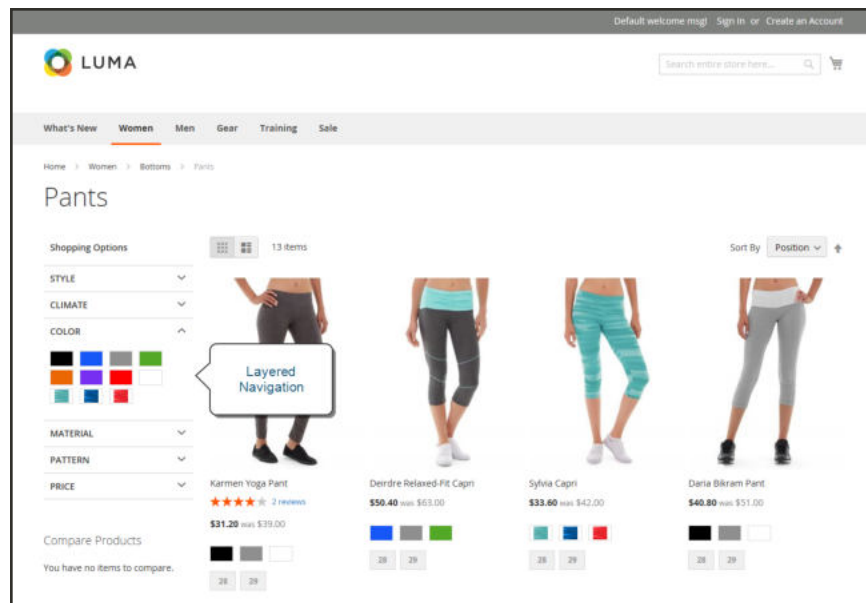
If an image isn't available for a swatch, the attribute value appears as text. A text-based swatch is like a button with a text label, and behaves in the same way as a swatch with an image. When text-based swatches are used to show the available sizes, any size that is not available is crossed out.



Text-Based Swatches for Size

## Swatches in Layered Navigation

Swatches can also be used in layered navigation, provided that the Use in Layered Navigation property of the color attribute is set to “Yes.” The following example shows both text-based and color image swatches in layered navigation.



Swatches in Layered Navigation

## Creating Swatches

Swatches can be defined as a component of the color attribute, or set up locally for a specific product and uploaded as **product images**.

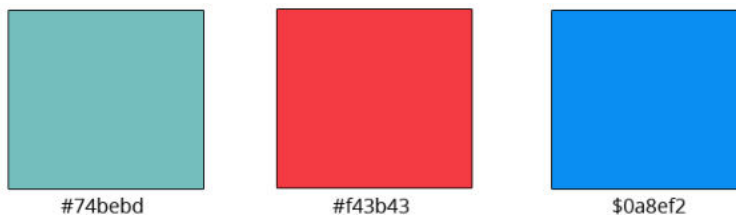
In the following examples, the Sylvia Capris are available in specific values of red, green, and blue. Because the swatches were taken from the product image, each is a true representation of the color. The color attribute is used to manage the information for all product colors and swatches.

### Step 1: Create the Swatches

Use either of the following methods to create swatches for your products:

#### Method 1: Add a Color Swatch

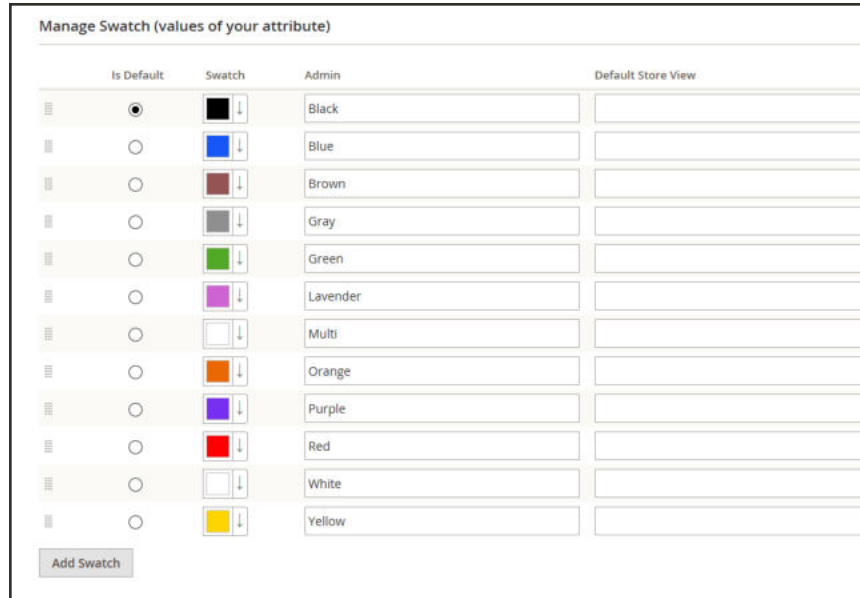
1. To capture the true color of a product, open the image in a photo editor and use the eye dropper tool to identify the exact color. Then, take note of the equivalent hexadecimal value.



*Hexadecimal Color Values*

2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
3. In the grid, open the **color** attribute in edit mode.
4. Verify that **Catalog Input Type for Store Owner** is set to “Visual Swatch.”
5. Under **Manage Swatch** (values of your attribute), tap **Add Swatch**. Then, do the following:





Manage Swatch Values

- a. In the Swatch column, tap the new swatch to display the menu. Then, select **Choose a color**.



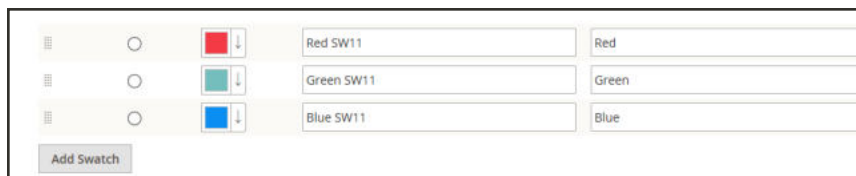
Choose a Color

- b. In the color picker, place your cursor in the # field, and press the **Backspace** key to delete the current value. Then, enter the six-character hexadecimal value of the new color..



- c. To save the swatch, tap the Color Wheel ( ) in the lower-right corner of the color picker.
- d. In the Admin column, enter a label to describe the color to the store administrator. Then if applicable, enter the translation of the color for each each language supported. In the following example, we include the SKU for reference in the Admin label because the colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.

- e. In the **Is Default** column, select the swatch that is to be the default option.
- f. To change the order of the swatches, simply drag each swatch into position.



*Swatch Labels*

6. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.
7. The last step is to open each product in **Edit** mode, and update the **Color** attribute with the correct swatch. To update multiple products at the same time, follow the steps below.

### Method 2: Upload a Swatch Image

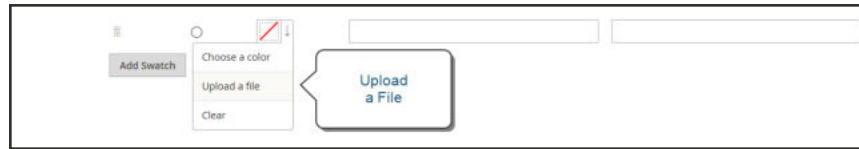
1. To capture an image for a swatch, open the product image in a photo editor, and save a square area of the image that depicts the color, pattern, or texture. Then repeat for each variation of the product. The size and dimensions of the swatch is determined by the theme. As a general rule, saving an image as a square helps to preserve the aspect ratio of a pattern.



*Swatch Images*

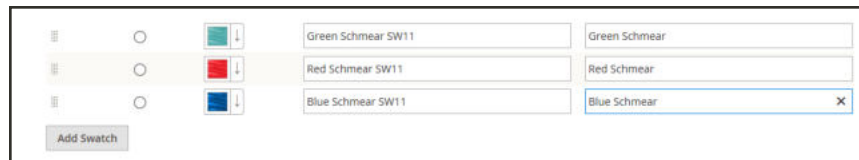
2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
3. In the grid, open the **color** attribute in edit mode.
4. Verify that **Catalog Input Type for Store Owner** is set to “Visual Swatch.”
5. Under **Manage Swatch** (values of your attribute), tap **Add Swatch**. Then, do the following:

- a. In the Swatch column, tap the new swatch to display the menu. Then, choose **Upload a file**.



*Upload a File*

- b. Navigate to the swatch file that you prepared, and choose the file to upload.
- c. Repeat these steps for each swatch image.
- d. Enter the labels for the Admin and Storefront. In this example, we include the SKU in the admin label for reference because these colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.

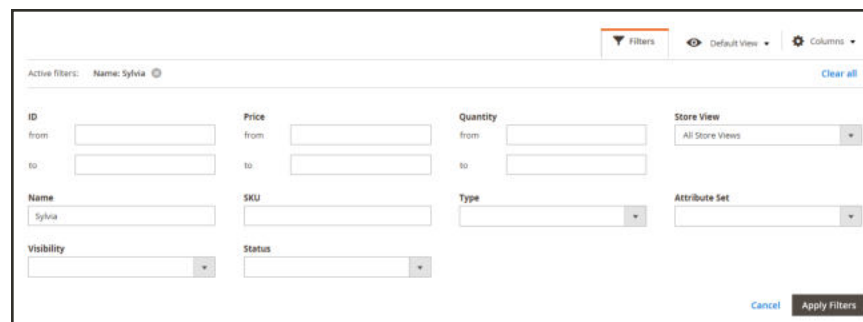


*Enter Labels*

6. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.
7. The last step is to open each product in **Edit** mode, and update the **Color** attribute with the correct swatch. To update multiple products at the same time, follow the steps below.







## Step 2: Update Your Products

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. **Filter** the list by Name or SKU to include only the applicable products. The following example filters the list on a partial product name.



*Filters*

- In the grid, mark the checkbox of each product to which the swatch applies. In this example, all blue capris are selected. Then, set the **Actions** control to “Update Attributes.”

Actions		7 records found (2 selected)										
<input type="checkbox"/> Delete <input type="checkbox"/> Change status <input checked="" type="checkbox"/> Update attributes		Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action	
		Sylvia Capri-29-Red	Simple Product	Bottom	WP11-29-Red	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>	
<input type="checkbox"/>	1891		Sylvia Capri-29-Green	Simple Product	Bottom	WP11-29-Green	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	1890		Sylvia Capri-29-Blue	Simple Product	Bottom	WP11-29-Blue	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input type="checkbox"/>	1889		Sylvia Capri-28-Red	Simple Product	Bottom	WP11-28-Red	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input type="checkbox"/>	1888		Sylvia Capri-28-Green	Simple Product	Bottom	WP11-28-Green	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	1887		Sylvia Capri-28-Blue	Simple Product	Bottom	WP11-28-Blue	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>
<input type="checkbox"/>	1893		Sylvia Capri	Configurable Product	Bottom	WP11	\$42.00	0.0000	Catalog_Search	Enabled	Main Website	<a href="#">Edit</a>

*Update Attributes*

- Scroll down to the **Color** attribute, and mark the **Change** checkbox.

Color Blue SW11 [GLOBAL]

Change

*Change*

- Choose the swatch that applies to the selected products, and tap **Save**. Then when prompted, refresh the cache.



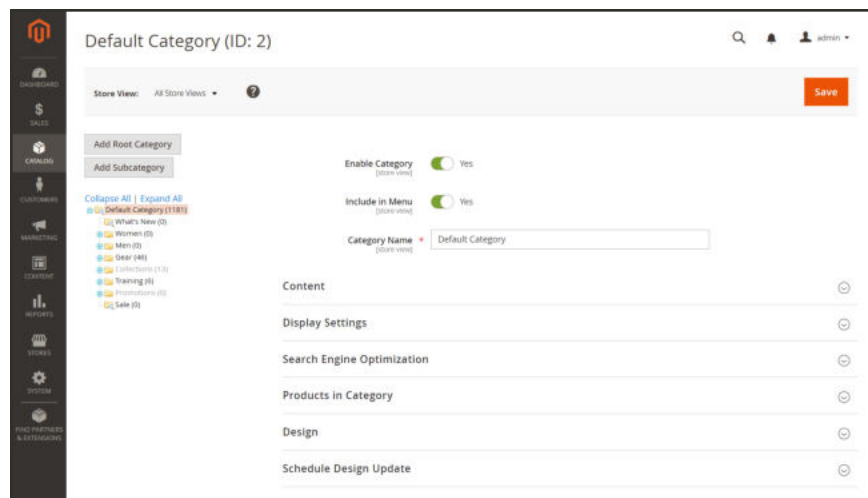
*Swatch in Storefront*



## CHAPTER 17:

# Categories

Before you add products to your catalog, you need to establish the basic category structure of your catalog. Every product must be assigned to at least one category. Categories are usually created in advance, before products are added to the catalog. However, you can also add categories “on the fly” while creating a product. The category structure of the catalog is reflected by the main menu — or **top navigation** — of the store.



*Category Tree*

### Controls

FIELD	DESCRIPTION
Add Root Category	Creates a new root category.
Add Subcategory	Adds a subcategory below the current category or subcategory.
Collapse All / Expand All	Either collapses or expands the category tree.
Delete	Removes the current category or subcategory from the tree.
Save	Saves any changes made to the category.

## Best Practices for Product Categories



### Category Structure

The structure of the categories in the main menu can impact customer experience and performance. As a best practice, it is usually best to identify one over-arching top-level category, and avoid having other categories with the same name. For example, rather than having multiple categories for “Women” organized under different departments, such as Clothing/Women, Shoes/Woman, Hats/Women, It can be more efficient to make the top-level parent category “Women,” and then create subcategories as needed below. Be consistent with the category structure, and use the same approach for all product types in your catalog.



### Business Rules and Automation

Consider the category structure and available attribute values when using business logic to show similar items on a catalog page, or to set up a personalized promotion, automated process, or search criteria. For example, if you were to specify “polo” as a parent category, the results might include mixed gender and age-inappropriate products. However, if you were to match a specific subcategory of polo shirts, the results would be more narrow and likely to appeal to a specific customer — especially when combined with other attribute values that target a specific customer.

Consider the number of products that must be filtered through and retrieved when referencing a specific category path. The difference in results can be dramatic. Consider the different results returned by the following category paths:

[Category: All Products/Shirts/Father’s Day/Polos/Sale]

[Category Path: Men/Shirts/Polos]

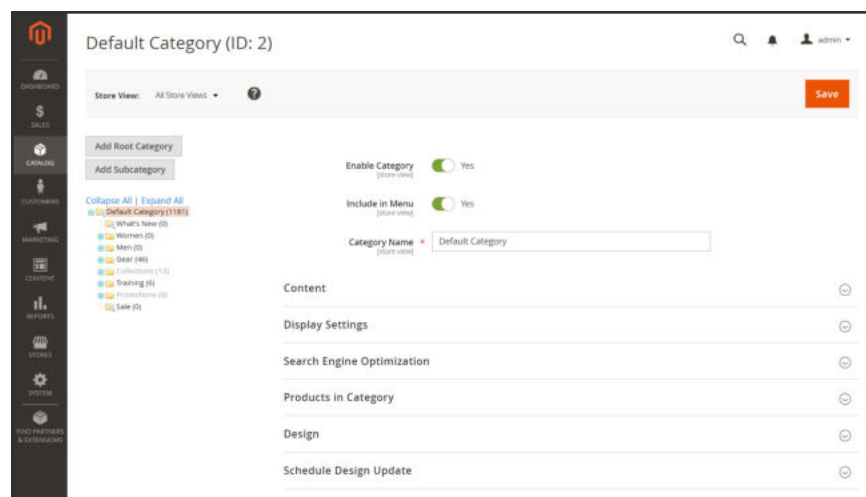
[Child Category: Polos]

It’s important to clearly define categorical relationships such as parent category, sub category, category path, and any associated keywords and attributes such as availability, sale price, brand, size and color.

## Creating Categories

The category structure of your catalog is like an upside-down tree, with the root at the top. Each section of the tree can be expanded and collapsed. Any disabled or hidden categories are grayed out. The first level of categories below the **root** typically appear as options in the **main menu**. You can create as many additional subcategories as needed, according to the **maximum menu depth** that is set in the configuration. Categories can be dragged and dropped to other locations in the tree. The category ID number appears in parentheses after the category name at the top of the page.

For a website with multiple **stores**, you can create a different root category for each store that defines the set of categories that is used for the **top navigation**.



*Category Tree*

### Process Overview:

- Step 1: **Create a Category**
- Step 2: **Complete the Basic Information**
- Step 3: **Complete the Category Content**
- Step 4: **Complete the Display Settings**
- Step 5: **Complete the Search Engine Optimization Settings**
- Step 6: **Choose the Products in Category**
- Step 7: **Complete the Design Settings**



### Step 1: Create a Category

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. Set **Store View** to determine where the new category is to be available.
3. In the category tree, tap the parent category of the new category. The parent is one level above the new category.

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

4. Tap **Add Subcategory**.

### Step 2: Complete the Basic Information

1. If you want the category to be immediately available in the store, set **Enable Category** to the "Yes" position.
2. To include the category in the **top navigation**, set **Include in Menu** to the "Yes" position.
3. Enter the **Category Name**.


The screenshot shows a form titled "Basic Information" with the following elements:

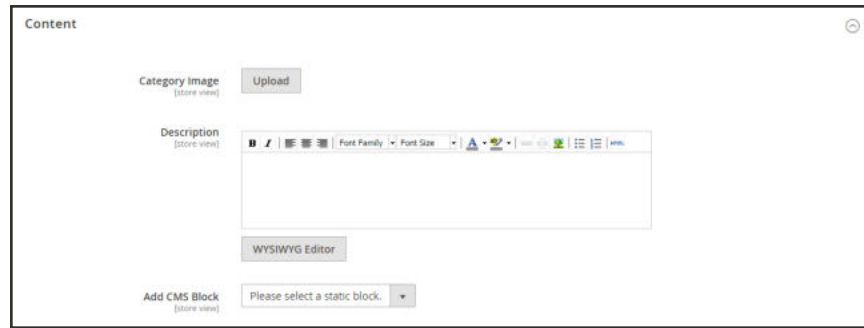
- Enable Category**: A toggle switch is turned on, with "Yes" selected.
- Include in Menu**: A toggle switch is turned on, with "Yes" selected.
- Category Name**: A text input field with a red asterisk indicating it is required.

*Basic Information*

4. Tap **Save** and continue.

### Step 3: Complete the Category Content

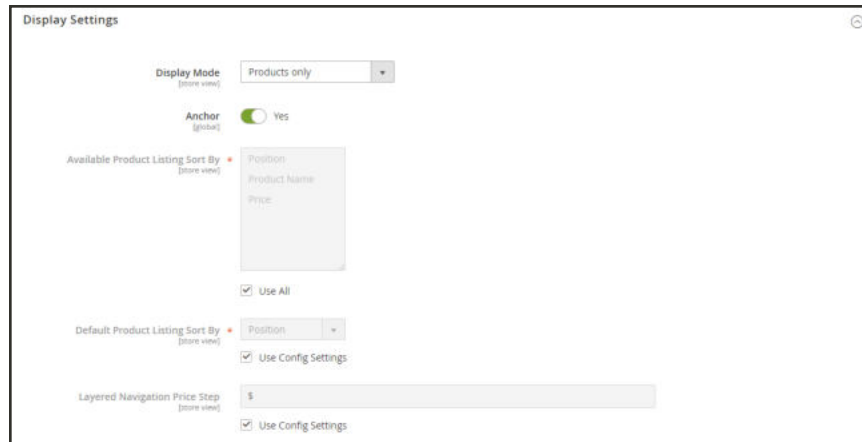
1. Expand  the **Content** section.
2. To display a **Category Image** at the top of the page, tap **Upload**. Then, choose the image that you want to represent the category.
3. In the **Description** box, enter the text that you want to appear on the category landing page. Then, format the text as needed. To learn more, see: [Using the Editor](#).
4. To include a content block on the category landing page, choose the **CMS Block** that you want to appear.
5. Tap **Save** and continue.



*Content*

### Step 4: Complete the Display Settings

1. Expand ☺ the **Display Settings** section.
2. Set **Display Mode** to one of the following:
  - Products Only
  - Static Block Only
  - Static Block and Products
3. If you want the category page to include the “Filter by Attribute” section of layered navigation, set **Anchor** to the “Yes” position.
4. To change the **Available Product Listing Sort By** options, do the following:
  - a. Clear the **Use All** checkbox.
  - b. Select one or more of the available values to be available for customers to sort the list. By default, all available values are included. For example, the values might include:
    - Position
    - Product Name
    - Price
5. To set the default sort order for the category, choose the **Default Product Listing Sort By** value.
6. To change the default layered navigation **price step** setting, do the following:
  - a. Clear the **Use Config Settings** checkbox.
  - b. Enter the value to be used as an incremental price step for layered navigation.
7. Tap **Save** and continue.



*Display Settings*

### Step 5: Complete the Search Engine Optimization Settings

1. Expand ☺ the **Search Engine Optimization Settings** section.
2. Complete the following **meta data** for the category:
  - Meta Title
  - Meta Keywords
  - Meta Description

A screenshot of the 'Search Engine Optimization' settings form. The form is titled 'Search Engine Optimization' and has a close button in the top right corner. It contains three input fields: 'Meta Title [store view]', 'Meta Keywords [store view]', and 'Meta Description [store view]'. Each field is currently empty.

*Search Engine Optimization*

3. Tap **Save** and continue.

### Step 6: Choose the Products in Category

1. Expand ☺ the **Products in Category** section. Then, use one of the following methods to add products to the category.
2. Use the **filters** as needed to find the products.

To display all records that are not yet included in the category, set the record chooser in the first column to "No." Then, click **Search**.
3. In the first column, mark the checkbox of each product to include in the category.

<input checked="" type="checkbox"/>	ID	Name	SKU	Price	Position
Yes				From To	From To
<input checked="" type="checkbox"/>	2046	Set of Sprite Yoga Straps	24-WG085_Group		00
<input checked="" type="checkbox"/>	51	Sprite Yoga Companion Kit	24-WG080		00
<input checked="" type="checkbox"/>	44	Didi Sport Watch	24-WG02	\$92.00	00
<input checked="" type="checkbox"/>	43	Clamber Watch	24-WG03	\$54.00	00

*Products In Category*

4. Tap **Save** and continue.

### Step 7: Complete the Design Settings

1. Expand ☺ the **Design** section. Then, do the following:
  - a. To change the design of the category pages, choose the **Theme** that you want to apply.
  - b. To change the column layout of the category pages, choose the **Layout** that you want to apply.
  - c. To enter custom code, enter valid XML code in the **Layout Update XML** box.
  - d. To use the same design for product pages, set **Apply Design to Products** to the “Yes” position.

**Design**

Theme [store view] -- Please Select --

Layout [store view] No layout updates

Layout Update XML [store view]

Apply Design to Products [store view]  No

*Design*

2. To schedule the design update for a specific time period, do the following:
  - a. Expand the **Schedule Design Update** section.
  - b. Use the calendar (📅) to choose the Schedule Update **From** and **To** dates.

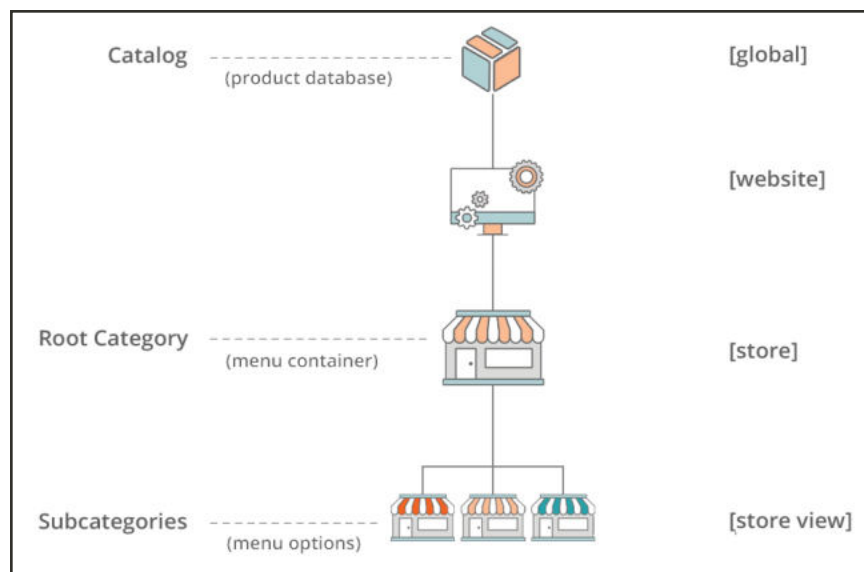


*Scheduled Design Update*

3. When complete, tap **Save**.

## Root Categories

The products in the main menu are determined by the root category that is assigned to the **store**. The root category is basically a container for the main menu in the category tree. You can create a root category with an entirely new set of products, or copy products from an existing root category. The root category can be assigned to the current store, or to any other store in the same website.



### *Scope of Main Menu*

From the Admin, the category structure is like an upside-down tree, with the root on top. The root has a name, but no URL key, and does not appear in the **top navigation** of the store. All other categories in the menu are nested below the root. Because the root category is the highest level of the catalog, your store can have only one root category active at a time. You can, however, create additional root categories for alternate catalog structures, different stores, and views.

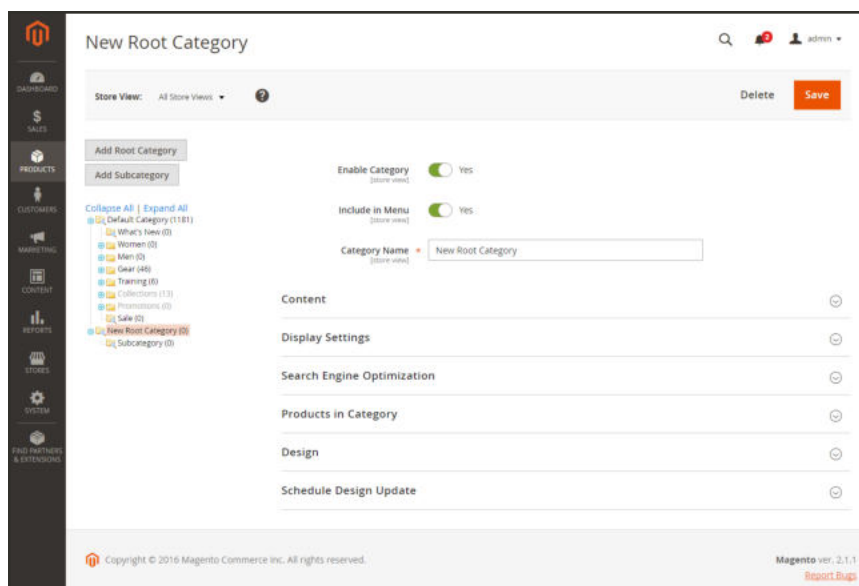
The following example shows how to create a new root category and assign it to a different store.

#### **Process Overview:**


- Step 1: **Create a New Root Category**
- Step 2: **Build Out the Main Menu**
- Step 3: **Assign the Root Category to the Store**

### Step 1: Create a New Root Category

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the panel on the left, tap **Add Root Category**.



*New Root Category*

3. Assign a **Category Name**.  
The name you choose will initially be assigned to all store views.
4. If you want to add products to the catalog from the current catalog, do the following:
  - a. Expand  the **Products in Category** section.
  - b. Use the **search filters** to find the products you want. Then, mark the checkbox of each product that you want to copy into the new catalog.
5. When complete, tap **Save**.

### Step 2: Build Out the Main Menu

1. In the panel on the left, select the new root category that you created in the previous step.
2. Tap **Add Subcategory**. Then, follow the instructions to create the **category structure** for the main menu.



### Step 3: Assign the Root Category to the Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. In the **Stores** column of the grid, click the store that you want to assign the new catalog.
3. Set **Root Category** to the new root category that you created.
4. Make sure that the store has a **Default Store View** assigned. The store must have at least one **store view**.
5. When complete, tap **Save Store**.
6. To verify that the store has a new catalog, do the following:
  - a. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.  
Any products that were copied to the new catalog appear in the grid.
  - b. Visit the storefront to verify that the new catalog and main menu are working correctly.

## Hidden Categories

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

### To create hidden categories:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree, select the category you want to hide. Then, do the following:
  - a. Set **Is Active** to “Yes.”
  - b. Set **Include in Menu** to “No.”
3. In the **Display Settings** section, set **Anchor** to “No.”

The hidden category is active, but does not appear in the top menu, or in layered navigation.

4. Although the category is hidden, you can still create subcategories beneath it, and make them active. Complete the following settings for each hidden subcategory:
  - a. Set **Enable Category** to “Yes.”
  - b. In the **Display Settings** section, set **Anchor** to “Yes.”

As active categories, you can now link to them from other places in your store, but they will not appear in the menu.

5. When complete, tap **Save**.

## Modifying a Category

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

### To move a category:

1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. To move a category, drag-and-drop the category to a new position in the tree. Changes to the category structure are saved automatically.

### To delete a category:

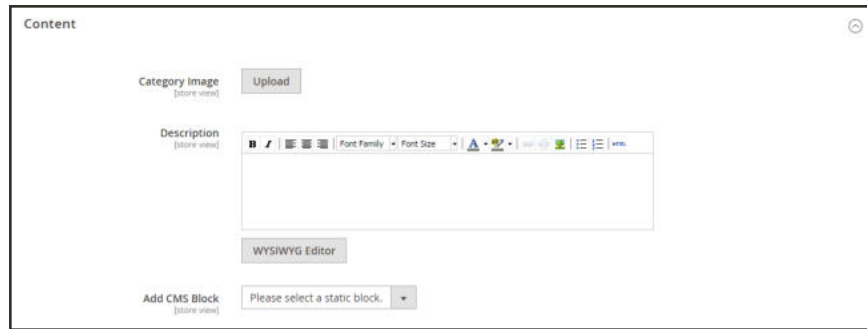
3. In the category tree, select the category that you want to delete.

A deleted category cannot be restored, so make sure that you have selected the correct category before proceeding.

4. Tap **Delete Category**. Then when prompted to confirm, tap **OK**.

## Content Settings

The Content settings determine any additional content appears on the category page. In addition to the list of category products, the page can include an image, description, and CMS block.



*Category Content*

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Category Image	Store View	<p>Specifies an image for the top of the category page.</p> <p><b>Upload</b> Uploads an image file from your local computer to the gallery, and uses it as the category image.</p>
Description	Store View	<p>Specifies a description that appears on the category page.</p> <p><b>WYSIWYG Editor</b> Toggles the editor between WYSIWYG and HTML modes.</p>
Add CMS Block	Store View	<p>Adds an existing CMS block to the category page.</p>

## Display Settings

The Display Settings determine which content elements appear on a category page and the order in which products appear. You can enable CMS blocks, set the anchor status of the category, and manage sorting options from the Display Settings tab. For examples of how categories are reflected in the storefront, see: [Catalog Navigation](#).

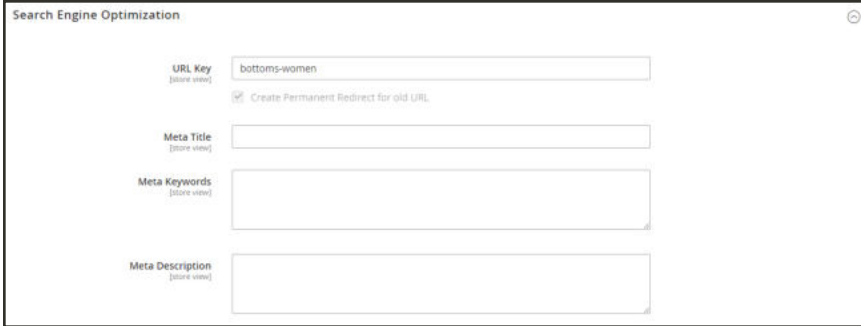
*Display Settings*

### Field Descriptions

FIELD	DESCRIPTION
Display Mode	Determines the content elements displayed on the category page. Options: Products Only Static Block Only Static Block and Products
Anchor	When set to “Yes,” includes the “filter by attribute” section in the layered navigation. Options: Yes / No
Available Product Listing Sort By	(Required) The default values are Position, Name, and Price. To customize the sorting option, clear the Use All Available Attributes checkbox and select the attributes you want to use. You can define and add attributes as needed.
Default Product Listing Sort By	(Required) To define the default “Sort By” option, clear the “Use Config Settings” checkbox and select an attribute.
Layered Navigation Price Step	By default, Magento displays the price range in increments of 10, 100, and 1000, depending on the products in the list. To change the Price Step range, clear the “Use Config Settings” checkbox.

## Search Engine Optimization

The Search Engine Optimization section specifies the **URL Key** and **meta data** fields that are used by search engines to index the category. Although some search engines ignore meta keywords, others continue to use them. The current **SEO best practice** is to incorporate high-value keywords in both the meta title and meta description.



The screenshot shows the 'Search Engine Optimization' section of a Magento admin panel. It contains the following fields and options:

- URL Key** [store view]: A text input field containing the value 'bottoms-women'.
- Create Permanent Redirect for old URL.
- Meta Title** [store view]: An empty text input field.
- Meta Keywords** [store view]: An empty text input field.
- Meta Description** [store view]: An empty text input field.

*Search Engine Optimization*

## Field Descriptions

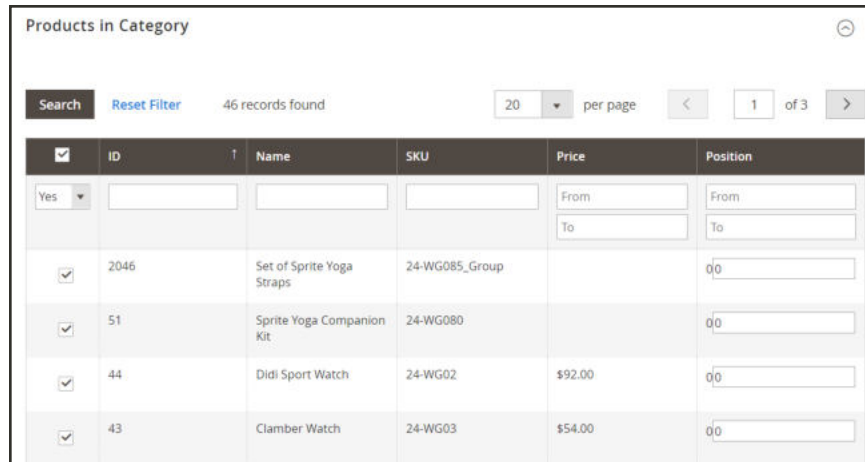
FIELD	SCOPE	DESCRIPTION
URL Key	Store View	<p>Determines the online address of the category page. The URL key is added to the base URL of the store, and appears in the address bar of a browser. In the configuration, you can either include or exclude the category URL key in the product URL.</p> <p>The URL Key should be all lowercase characters, with hyphens instead of spaces. Do not include a suffix such as .html, because it is managed in the configuration.</p>
Meta Title	Store View	<p>The title appears in the title bar and tab of your browser, and is also the title on a search engine results page (<a href="#">SERP</a><sup>1</sup>). The meta title should be unique to the page, and less than 70 characters in length.</p>
Meta Keywords	Store View	<p>Relevant keywords for the category. Consider using keywords that customers might use to find products in the category.</p>
Meta Description	Store View	<p>The meta description provides a brief overview of the page for search results listings. An ideal length is between 150-160 characters in length, with a maximum of 255 characters. Although not visible to the customer, some search engines include the meta description on the search results page.</p>

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<sup>1</sup>Search Engine Results Page

## Products in Category

The Products in Category section lists the products that are currently assigned to the category. The search filters at the top of each column are used to add and remove products from the category.



Category Products

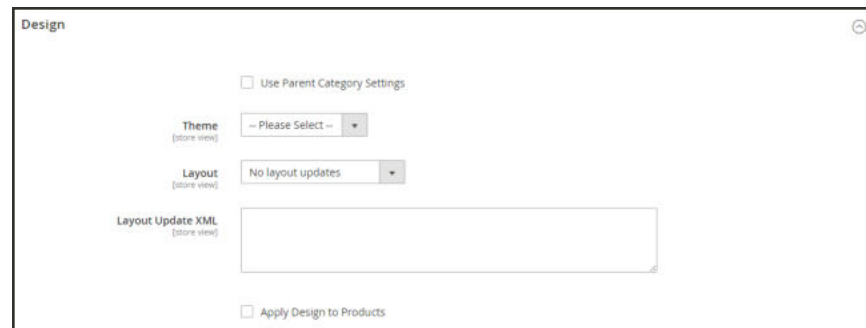
### Workspace Controls

CONTROL	DESCRIPTION
<input checked="" type="checkbox"/>	The checkbox in the header of the first column can be used to select or deselect all products.  The control in the first row determines the type of search, and can be set to include any record, or only those that are either assigned or not assigned to the category. The checkbox in the first column of each row identifies products to be added to the category. Options: Yes / No / Any
Search Filters	The <b>filter controls</b> at the top of each column can be used to enter specific values you want to either include or omit from the list, depending on the Select All setting.
Reset Filter	Clears all search filters.
<input type="button" value="Search"/>	Searches the catalog based on the filter criteria, and displays the result.



## Design Settings

The Design section gives you control over the look and feel of a category, all associated product pages, and page layout. You can customize a category page and its associated products for a promotion, or to differentiate the category. For example, you might develop a distinctive design for a brand or special line of products, or apply an update for a specific period of time.



The screenshot shows the 'Design' settings panel. At the top, there is a checkbox labeled 'Use Parent Category Settings'. Below this, there are three main sections: 'Theme' with a dropdown menu currently set to '-- Please Select --', 'Layout' with a dropdown menu set to 'No layout updates', and 'Layout Update XML' with a large empty text area. At the bottom of the panel, there is another checkbox labeled 'Apply Design to Products'.

*Design*

The Scheduled Design Update section determines the range of dates when a custom design is applied to category pages.



The screenshot shows the 'Schedule Design Update' settings panel. It features a 'Schedule Update From' field with a calendar icon, followed by the word 'To', and another field with a calendar icon for the end date.

*Scheduled Design Update*

## Field Descriptions

FIELD	DESCRIPTION
Use Parent Category Settings	Allows the current category to inherit the design settings from the parent category. If used, all other fields in the Design section become unavailable. Options: Yes / No
Theme	Applies a custom theme to the category.
Layout	Applies a different layout to the category page. Options: <ul style="list-style-type: none"> <li>No layout updates    By default, layout updates are not available for category pages.</li> <li>Empty    Use to define your own page layout. (Requires an understanding of XML.)</li> <li>1 column    Applies a one-column layout to the category page.</li> <li>2 columns with left bar    Applies a two-column layout with a left sidebar to the category page.</li> <li>2 columns with right bar    Applies a two-column layout with a right sidebar to the category page.</li> <li>3 columns    Applies a three-column layout to the category page.</li> </ul>
<b>Layout Update XML</b>	Updates the theme layout with custom XML code.
Apply Design to Products	When selected, applies the custom settings to all products in the category.

### SCHEDULED DESIGN UPDATE

Schedule Update From/To	Determines the range of dates when a custom layout is applied to the category.
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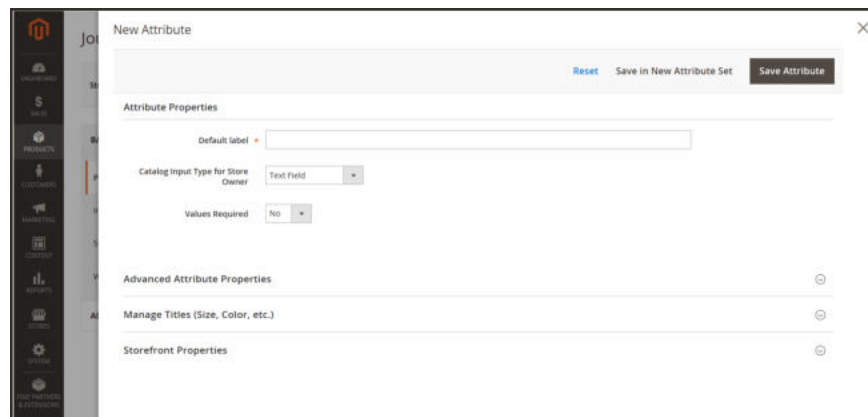


## CHAPTER 18:

# Product Attributes

Attributes are the building blocks of your product catalog, and describe specific characteristics of a product. Product attributes can be organized into **attribute sets**, which are then used as templates for creating products.

Attributes determine the type of input control that is used for product options, provide additional information for product pages, and are used as search parameters and criteria for layered navigation, product comparison reports, and promotions. You can create as many attributes and attribute sets as necessary to describe the products in your catalog. In addition to the attributes that you can create, system attributes, such as price, are built into the core Magento platform and cannot be changed.



*Creating a New Attribute While Editing a Product*

## Best Practices for Product Attributes

- Attribute Names**

Establish consistent attribute naming conventions, that includes letter case and punctuation. For example, `Color:Green` and `Color:green` might be considered as two different attribute values by different systems. Such noise in the data can affect business rules, search results and data filters for applications that match products to rules.
- Attribute Use**

Consider how attributes are to be used when assigning properties and values. Identify the attributes that are used as labels for presentation, such as a title or product name, image, price, and description, and which attributes are used for data entry. Consider how the attributes are represented on different pages throughout the site, and how they appear on category pages, product detail pages, category grids, and thumbnail sliders.
- Color**

Ad-hoc color descriptions can pose a challenge from the standpoint of database operations. Color names such as “Azure Skies” or “Robin Egg Blue” have great appeal, but might not return the best results when used as search criteria, or if merchandising requires you to specify `Color_Family:Blue`. Take into consideration how colors are represented in search results and layered navigation, and establish some guidelines for your business needs. Then, be consistent when assigning color attribute values throughout your catalog.

## Creating Product Attributes

Attributes can be created while working on a product, or from the Product Attributes page. The following example shows how to create attributes from the Stores menu.

*New Attribute Properties*

### Process Overview:

- Step 1: Describe the Basic Properties
- Step 2: Describe the Advanced Properties
- Step 3: Enter the Field Label
- Step 4: Describe the Storefront Properties

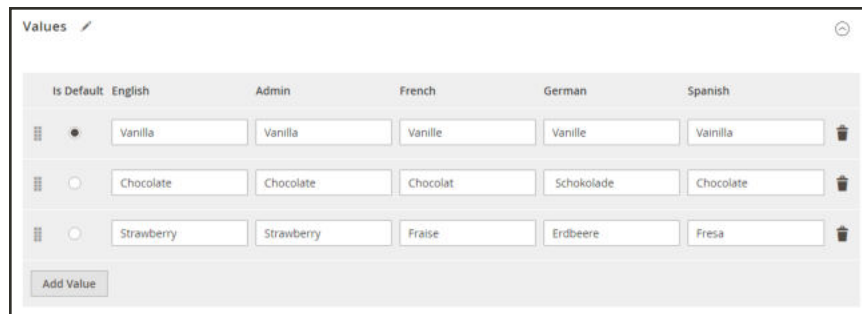
### Step 1: Describe the Basic Properties

1. On the Admin sidebar, tap **Stores**. Then under Attributes, choose **Product**.
2. Tap **Add New Attribute**.



*Attribute Properties*

3. Under Attribute Properties, enter a **Default Label** to identify the attribute.
4. Set **Catalog Input Type for Store Owner** to the type in input control to be used for data entry.
5. For Dropdown and Multiple Select input types, do the following:
  - a. Under **Manage Options**, tap **Add Option**.
  - b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.
  - c. Tap **Add Option** and repeat the previous step for each option that you want to include in the list.
  - d. Select **Is Default** to use the option as the default value.
6. If you want to require the customer to choose an option before the product can be purchased, set **Values Required** to “Yes.”



*Manage Options*

## Step 2: Describe the Advanced Properties (if needed)

1. Enter a unique **Attribute Code** in lowercase characters, and without spaces.

The screenshot shows the 'Advanced Attribute Properties' form with the following settings:

- Attribute Code:** flavor
- Scope:** Global
- Unique Value:** No
- Input Validation for Store Owner:** None
- Add to Column Options:** Yes
- Use in Filter Options:** Yes

*Advanced Attribute Properties*

2. Set **Scope** to indicate where in your store hierarchy the attribute can be used.
3. If you want to prevent duplicate values from being entered, set **Unique Value** to “Yes.”
4. To run a validity test of any data entered into a text field, set **Input Validation for Store Owner** to the type of data that the field should contain. This field is not available for input types with values that are selected. The test can validate any of the following:
  - Decimal Number
  - Integer Number
  - Email
  - URL
  - Letters
  - Letters (a-z, A-Z) or Numbers (0-9)

The screenshot shows the 'Input Validation for Store Owner' dropdown menu with the following options:

- None
- Decimal Number
- Integer Number
- Email
- URL
- Letters
- Letters (a-z, A-Z) or Numbers (0-9)


*Input Validation*

5. To add this attribute to the product grid, set the following options to "Yes."



- Add to Column Options**      Includes the attribute as a column in the Products grid.
- Use in Filter Options**        Adds a filter control to the column header in the Products grid.

### Step 3: Enter the Field Label

1. Expand  the **Manage titles** section.
2. Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.

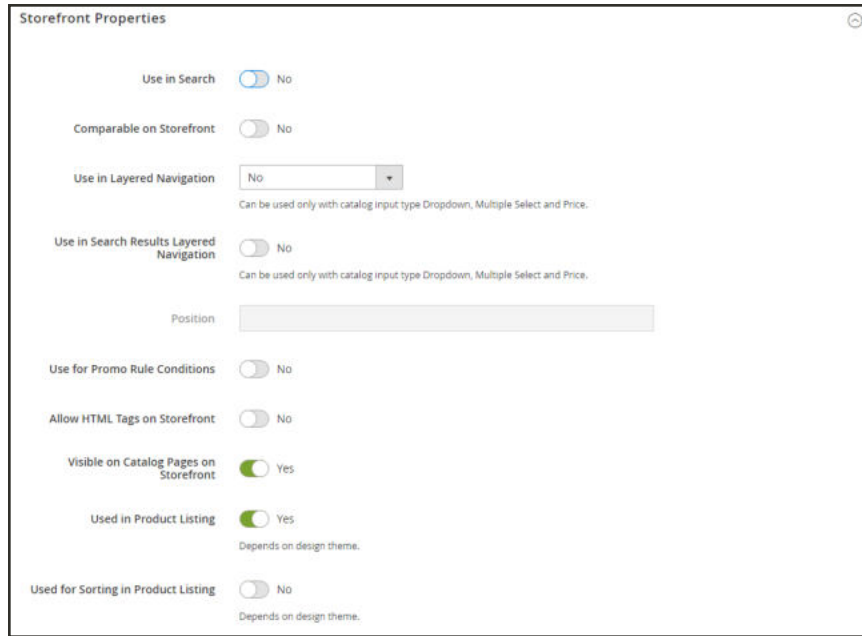


*Manage Titles*

### Step 4: Describe the Storefront Properties

1. In the panel on the left, choose **Storefront Properties**.
2. If the attribute is to be available for search, set **Use in Search** to “Yes.”
3. To include the attribute in Product Compare, set **Comparable on Storefront** to “Yes.”
4. For dropdown, multiple select and price fields, do the following:
  - a. To use the attribute as a filter in layered navigation, set **Use in Layered Navigation** to “Yes.”
  - b. to use the attribute in layered navigation on search results pages, set **Use in Search Results Layered Navigation** to “Yes,”
  - c. In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.
5. To use the attribute in price rules, set **Use for Promo Rule Conditions** to “Yes,”
6. To allow the text to be formatted with HTML, set **Allow HTML Tags on Frontend** to “Yes.” This setting makes the WYSIWYG editor available for the field.  
To include the attribute in catalog page listings, set **Visible on Catalog Pages on Storefront** to “Yes.”
7. Complete the following settings if supported by your theme:

- a. To include the attribute on the product detail page, set **Visible on Catalog Pages on Storefront** to “Yes.”
  - b. To include the attribute in product listings, set **Used in Product Listing** to “Yes.”
  - c. To use attribute as a sort parameter for product listings, set **Used for Sorting in Product Listing** to “Yes.”
8. When complete, tap **Save Attribute**.



*Storefront Properties*

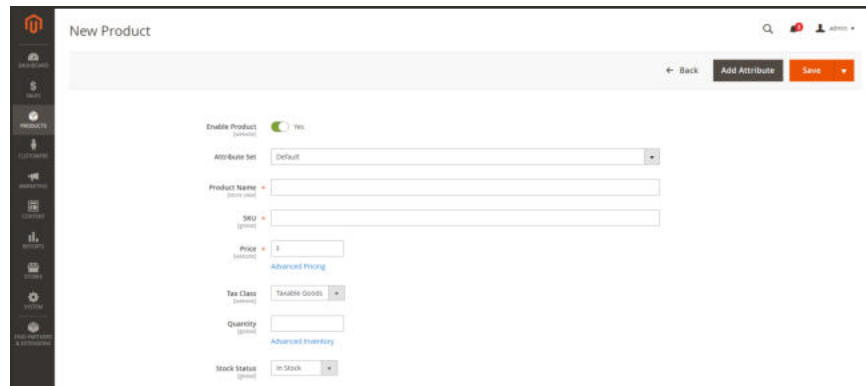
### Attributes for Configurable Products

Any attribute that is used as a drop-down list of options for a **configurable product** must have the following properties:

PROPERTY	VALUE
Catalog Input Type for Store Owner	Dropdown
Scope	Global

## Adding an Attribute to a Product

Although attributes are managed primarily from the **Stores** menu, you can also add new attributes “on the fly” while working on a product. You can choose from the list of existing attributes, or create a new attribute. The new attribute is added to the **attribute set** upon which the product is based.



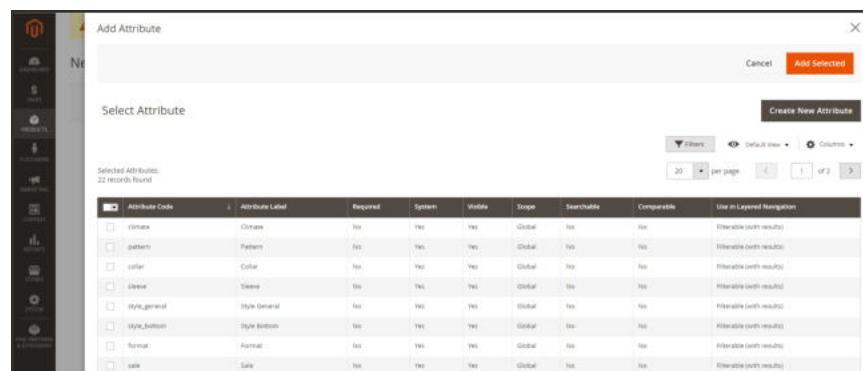
*Add Attribute*

### Process Overview:

- Step 1: **Add a New Attribute**
- Step 2: **Describe the Basic Properties**
- Step 3: **Describe the Advanced Properties**
- Step 4: **Enter the Field Label**
- Step 5: **Describe the Frontend Properties**

### Step 1: Add a New Attribute

1. Open the product in edit mode. Then in the upper-right corner, tap **Add Attribute**.



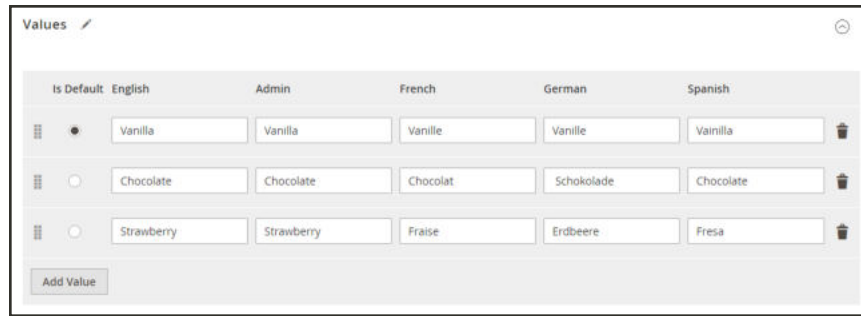
*New Attribute*

2. To add an existing attribute to the product, use the **filter controls** to find the attribute in the grid. Then, do the following:
  - a. Mark the checkbox in the first column of each attribute to be added.
  - b. Tap **Add Selected**.
3. To define a new attribute, tap **Create New Attribute**, and complete the following steps.

## Step 2: Describe the Basic Properties

1. Under **Attribute Properties**, enter a **Default Label** to identify the attribute.

2. Set **Catalog Input Type for Store Owner** to the type in **input control** to be used for data entry. If the attribute is used for a **configurable product**, choose “Dropdown.” Then, set **Required** to “Yes.”
3. For Dropdown and Multiple Select input types, do the following:
  - a. Under **Values**, tap **Add Value**.
  - b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.
  - c. Tap **Add Value** and repeat the previous step for each option that you want to include in the list.
  - d. Select **Is Default** to use the option as the default value.

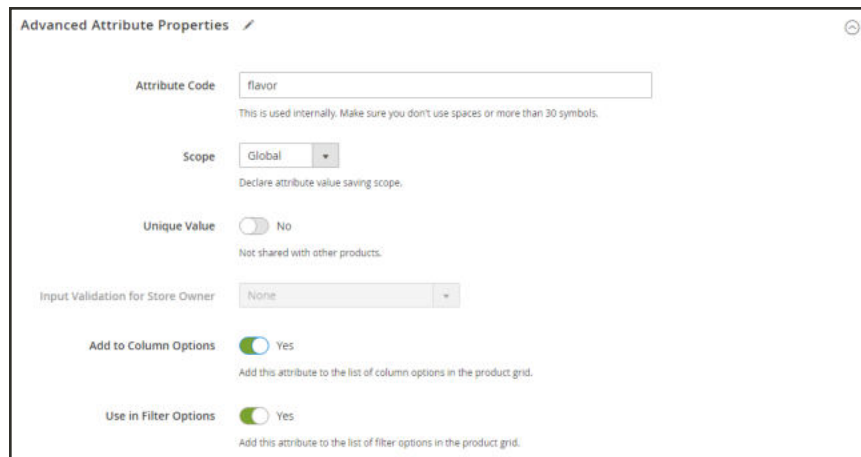


*Values*

4. If you want to require the customer to choose an option before the product can be purchased, set **Required** to “Yes.”

**Step 3: Describe the Advanced Properties** (if needed)

1. Enter a unique **Attribute Code** in lowercase characters, and without spaces.



*Advanced Attribute Properties*

2. Set **Scope** to indicate where in your store hierarchy the attribute can be used.  
If the attribute is used for a **configurable product**, choose “Global.”
3. If this attribute applies only to this product, set **Unique Value** to “Yes.”

4. To run a validity test of any data entered into a text field, set **Input Validation for Store Owner** to the type of data that the field should contain. This field is not available for input types with values that are selected. Input validation can be used for any of the following:
  - Decimal Number
  - Integer Number
  - Email
  - URL
  - Letters
  - Letters (a-z, A-Z) or Numbers (0-9)



*Input Validation*

5. If you want to be able to include the attribute as a column in the Products grid, set **Add to Column Options** to “Yes.”
6. If you want to be able to filter the Products grid by this column, set **Use in Filter Options** to “Yes.”

**Step 4: Enter the Field Label**

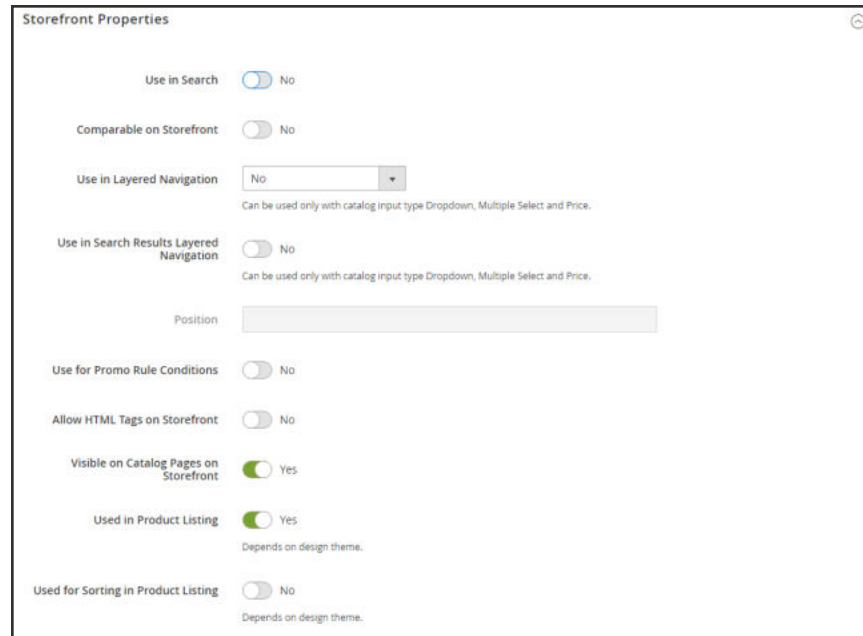
1. Expand ☺ the **Manage titles** section.
2. Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.



*Manage Titles*

### Step 5: Describe the Storefront Properties

- Expand  the **Storefront Properties** section. Then, do the following:



*Storefront Properties*

- To make the attribute available for search, set **Use in Search** to “Yes.”
- To include the attribute in Product Compare, set **Comparable on Storefront** to “Yes.”
- To include dropdown, multiple select, or price attributes in layered navigation, set **Use in Search Results Layered Navigation** to one of the following:

Filterable (with results)

Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters.

The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.

Filterable (no results)

Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.

- To use in layered navigation on search results pages, set **Use in Search Results Navigation** to “Yes.”

- e. In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.
- f. To use the attribute in price rules, set **Use for Promo Rule Conditions** to “Yes.”
- g. To allow the text to be formatted with HTML, set **Allow HTML Tags on Storefront** to “Yes.”

This setting makes the WYSIWYG editor available when editing the field.

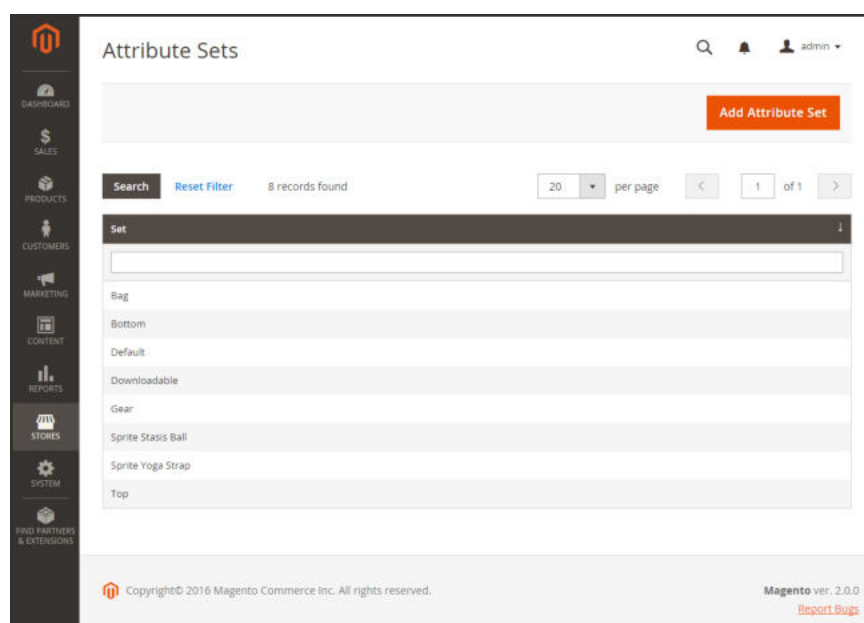
- h. To include the attribute on the product page, set **Visible on Catalog Pages on Storefront** to “Yes.”
2. Complete the following settings as supported by your theme:
    - a. To include the attribute in product listings, set **Used in Product Listing** to “Yes.”
    - b. To use attribute as a sort parameter for product listings, set **Used for Sorting in Product Listing** to “Yes.”
  3. When complete, tap **Save Attribute**.



## Attribute Sets

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

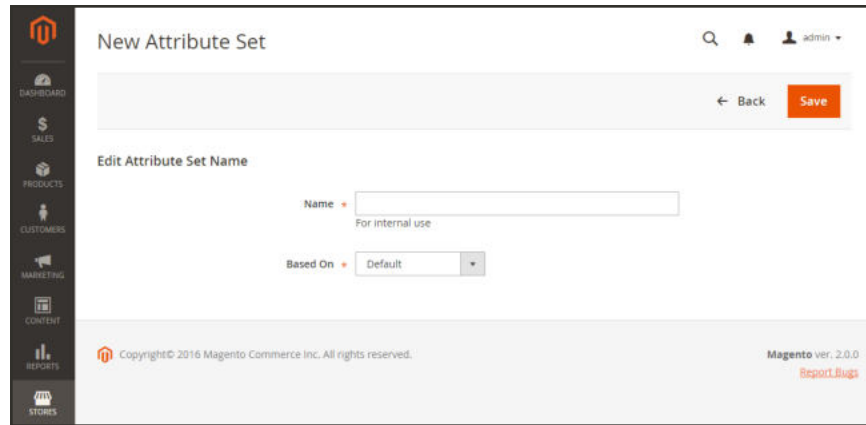
The attributes are organized into groups that determine where they appear in the product record. Your store comes with an initial attribute set called “default” which includes a set of commonly-used attributes. If you would like to add only a small number of attributes, you can add them to the default attribute set. However, if you sell products that require specific types of information, such as cameras, it might be better to create a dedicated attribute set that includes the specific attributes that are needed to describe the product.



*Attribute Sets*

### To create an attribute set:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Attribute Set**.
2. Tap **Add New Set**. Then, do the following:

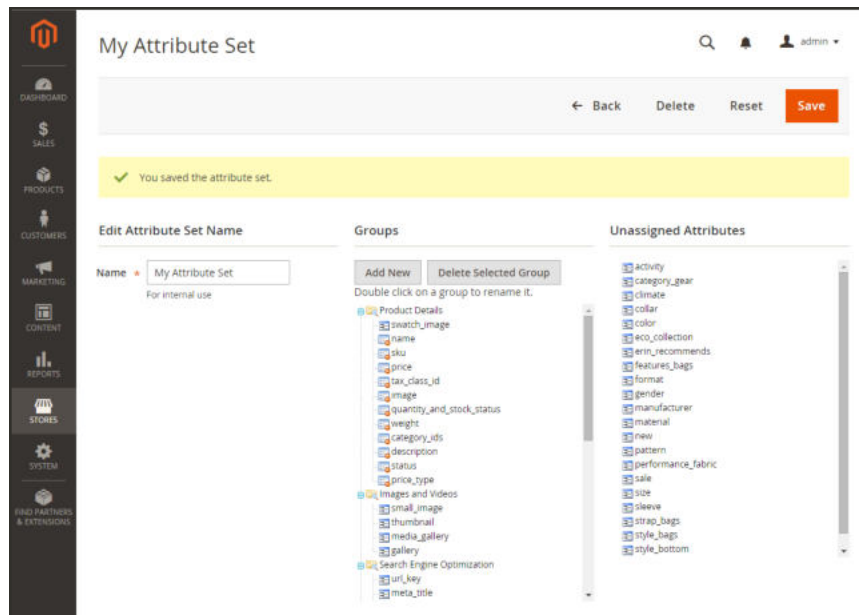


*Edit Set Name*

- a. Enter a **Name** for the attribute set.
- b. Set **Based On** to an existing attribute set to be used as a template.
- c. Tap **Save** . The next page displays the following:
  - The left column shows the name of the attribute set. The name is for internal reference, and can be changed as needed.
  - The center of the page lists the current selection of attribute groups.
  - The right column lists the selection of attributes that are currently not assigned to the attribute set.
- d. To add a new attribute to the set, drag the attribute from the **Unassigned Attributes** list to the appropriate folder in the **Groups** column.

System attributes are marked with a dot and cannot be removed from the Groups list. They can however, be dragged to another Group in the attribute set.

3. When complete, tap **Save**.



*Edit Attribute Set*

### To create a new attribute group:

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

The new group becomes a section of attributes in any product that is based on the attribute set.

## Attribute Input Types

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

### Attribute Input Types

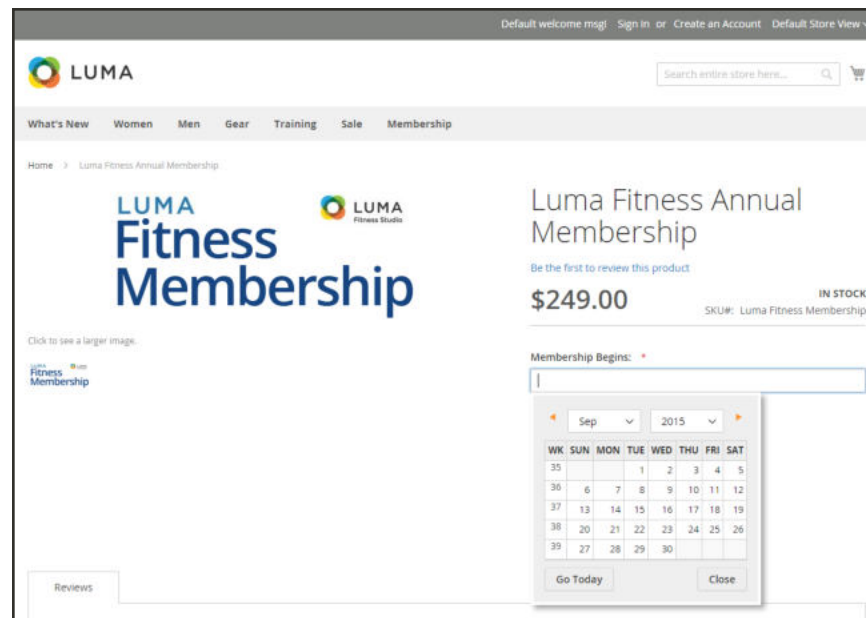
PROPERTY	DESCRIPTION
Text Field	A single line input field for text.
Text Area	A multiple-line input field for entering paragraphs of text such as a product description. You can use the WYSIWYG Editor to format the text with HTML tags, or type the tags directly into the text.
Text Editor	A fully-functioning text editor at the attribute location.
Date	Date values can be entered by making a selection from a drop-down list, or popup calendar (  ). Depending on your system configuration, dates can be typed directly into a field, or selected from the calendar or list. To format date and time values, see: <a href="#">Date &amp; Time Custom Options</a> .
Yes/No	Displays a drop-down list with pre-defined options of “Yes” and “No.”
Dropdown	Displays a drop-down list of values. Only one item can be selected at a time. The Dropdown input type is a key component of <a href="#">configurable products</a> .
Multiple Select	Displays a drop-down list of values. To select more than one option, hold the Ctrl key down and click each item.
Price	This input type is used to create price fields that are in addition to the predefined attributes, Price, Special Price, Tier Price and Cost. The currency used is determined by your system configuration.
Media Image	Associates an additional image with a product, such as a product logo, care instructions, or ingredients from a food label. When you add a media image attribute to the attribute set of a product, it becomes an additional image type, along with Base, Small, and Thumbnail. The media image attribute can be excluded from the <a href="#">media gallery</a> .
<a href="#">Fixed Product Tax</a>	Lets you define FPT rates based on the requirements of your locale.

## Attribute Input Types (cont.)

PROPERTY	DESCRIPTION
Visual Swatch	Displays a swatch that depicts the color, texture, or pattern of a configurable product. A visual swatch can be filled with a hexadecimal color value, or display an uploaded image that represents the color, material, texture, or pattern of the option.
Text Swatch	A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values.

## Date &amp; Time Options

You can customize the format of date and time fields, and select the input control that is used for data entry. Dates values can be selected from a drop-down list, or pop-up calendar.



*Pop-up Calendar*

### To format date/time fields:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, tap **Catalog**. Then, choose the **Catalog** option.
3. Expand the **Date & Time Custom Options** section.
4. To use a popup calendar as the input control for date fields, set **Use JavaScript Calendar** to “Yes.”
5. To establish the **Date Fields Order**, do the following:
  - a. Clear the **Use system value** checkbox.
  - b. Set the order of each part of the date field as needed:
    - Month
    - Day
    - Year
  - c. To set your preferred time format, do the following:
  - d. Clear the **Use system value** checkbox.
  - e. Set **Time Format** to one of the following:
    - 12h AM/PM
    - 24h
  - f. To establish the **Year Range** for the drop-down values, enter the year in “YYYY” format to set the **from** and **to** dates. If blank, the field defaults to the current year.

The screenshot shows the 'Date & Time Custom Options' configuration panel. It contains the following settings:

- Use JavaScript Calendar**: A dropdown menu set to 'Yes'.
- Date Fields Order**: Three dropdown menus for 'Month', 'Day', and 'Year', followed by a checked checkbox for 'Use system value'.
- Time Format**: A dropdown menu set to '12h AM/PM', followed by a checked checkbox for 'Use system value'.
- Year Range**: Two input fields labeled 'from' and 'to', with a note below stating 'Please use a four-digit year format.'

### *Date & Time Custom Options*

6. When complete, tap **Save Config**.





## CHAPTER 19:

# Using a Flat Catalog

Magento typically stores catalog data in multiple tables, based on the Entity-Attribute-Value (EAV<sup>1</sup>) model. Because product attributes are stored in many tables, SQL queries are sometimes long and complex.

In contrast, a flat catalog creates new tables on the fly, where each row contains all the necessary data about a product or category. A flat catalog is updated automatically—either every minute, or according to your cron job. Flat catalog indexing can also speed up the processing of catalog and cart price rules. A catalog with as many as 500,000 SKUs can be indexed quickly as a flat catalog.

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<sup>1</sup>Entity Attribute Value



## Flat Catalog Setup

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

### Process Overview:

Step 1: [Enable the Flat Catalog](#)

Step 2: [Verify the Results](#)

### Step 1: Enable the Flat Catalog

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Storefront** section. Then, do the following:
  - a. Set **Use Flat Catalog Category** to “Yes.” If necessary, clear the **Use system value** checkbox.
  - b. Set **Use Flat Catalog Product** to “Yes.”

The screenshot shows two configuration fields. The first field is 'Use Flat Catalog Category' with a dropdown menu set to 'Yes' and a checkbox labeled 'Use system value' which is unchecked. The second field is 'Use Flat Catalog Product' with a dropdown menu set to 'Yes'.

*Flat Catalog Configuration*

4. When complete, tap **Save Config**.
5. When prompted to update the cache, click the **Cache Management** link in the system message, and follow the instructions to refresh the cache.

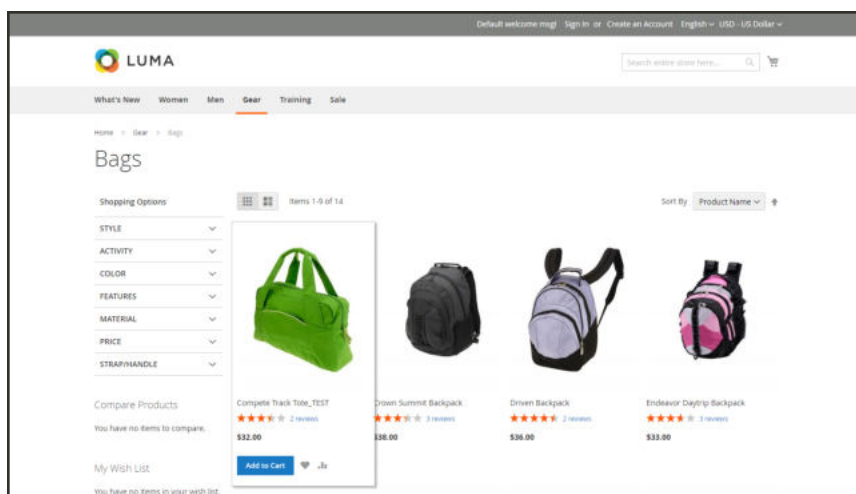
### Step 2: Verify the Results

#### Method 1: Verify the Results for a Single Product

1. On the Admin sidebar, tap **Products**. Then, choose **Categories**.
  - a. Open a product in edit mode.
  - b. In the **Name** field, add the text “\_TEST” to the end of the product name.
2. Tap **Save**.
3. On a new browser tab, navigate to the home page of your store. Then, do the following:

- a. Search for the product you edited.
- b. Use the navigation to browse to the product under its assigned category.

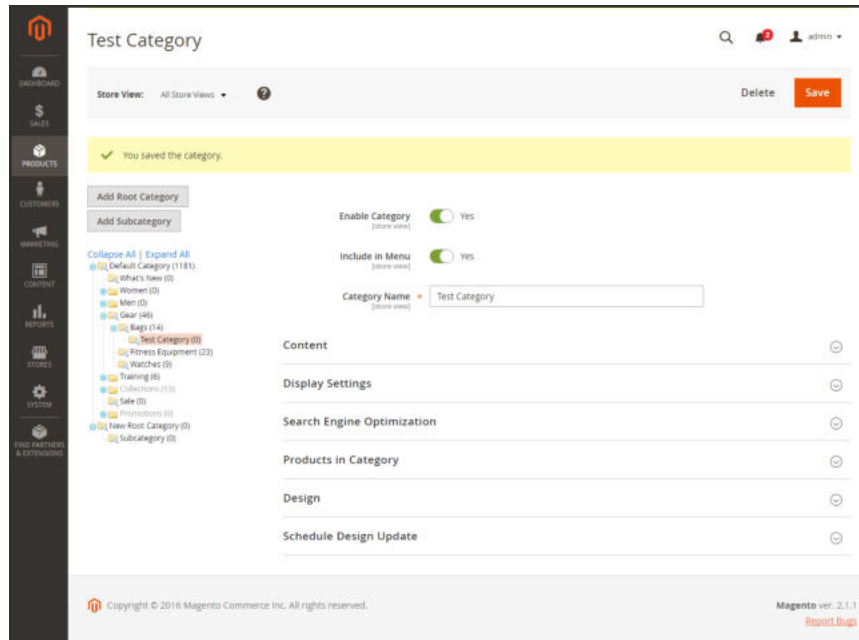
If necessary, refresh the page to see the results. The change will appear within the minute, or according to your **Cron** schedule.



*Storefront with Flat Catalog*

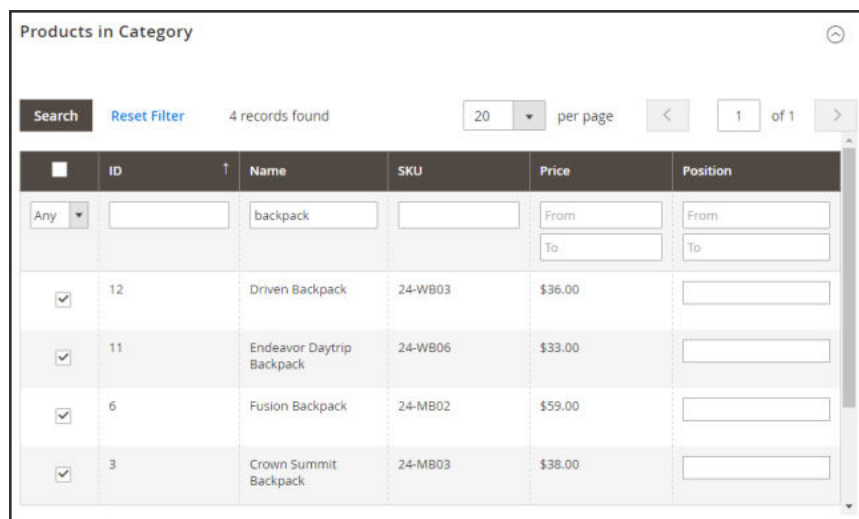
## Method 2: Verify the Results for a Category

1. On the Admin sidebar, tap **Products**. Then, choose **Categories**.
2. In the upper-left corner, verify that **Store View** is set to “All Store Views.”  
If prompted, tap **OK** to confirm.
3. In the category tree, select an existing category. Then, tap **Add Subcategory**, and do the following:
  - a. In the **Category Name** field, enter “Test Category.”
  - b. When complete, tap **Save**.



*Test Subcategory*

- c. Expand ☰ the **Products in Category** section. Then, click **Reset Filter** to display all products.
- d. Mark the checkbox of several products to add them to the new category. Then, tap **Save**.



*Test Category Products*

- 4. On a new browser tab, navigate to the home page of your store. Then, use the store navigation to browse to the category you created.

If necessary, refresh the page to see the results. The change will appear within the minute or according to your cron schedule.

### Step 3: Remove the Test Data

Do the following to remove the test data and restore the original product name and catalog configuration.

#### Remove the test category:

1. On the Admin sidebar, tap **Products**. Then, choose **Categories**.
2. In the category tree, select the test subcategory that you created.
3. In the upper-right corner, tap **Delete**. Then when prompted to confirm, tap **OK**.  
This will not remove the products that are assigned to the category.

#### Restore the original product name:

1. On the Admin sidebar, tap **Products**. Then, choose **Categories**.
2. Open the test product in edit mode.
3. Remove the “\_TEST” that you added to the **Product Name**.
4. In the upper-right corner, tap **Save**.

#### Restore the original catalog configuration:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Storefront** section, and do the following:
  - a. Set **Use Flat Catalog Category** to “No.”
  - b. Set **Use Flat Catalog Product** to “No.”
4. When complete, tap **Save Config**. Then when prompted, refresh the cache.

# MARKETING

## Contents

In this section of the guide, you'll learn how to leverage your store's built-in shopping tools to create opportunities for customer engagement, and how to set up targeted promotions with price rules. Leverage multiple sales channels by sending your product feeds to shopping sites and marketplaces. Then, use Google tools to analyze traffic, optimize your content, and plan your next campaign.

### Marketing Menu

#### Shopping Tools

- Opportunities to Engage

- Email a Friend

- Wish Lists

- Product Relationships

- Compare Products

- Recently Viewed / Compared Products

- Product Reviews

#### Promotions

#### Communications

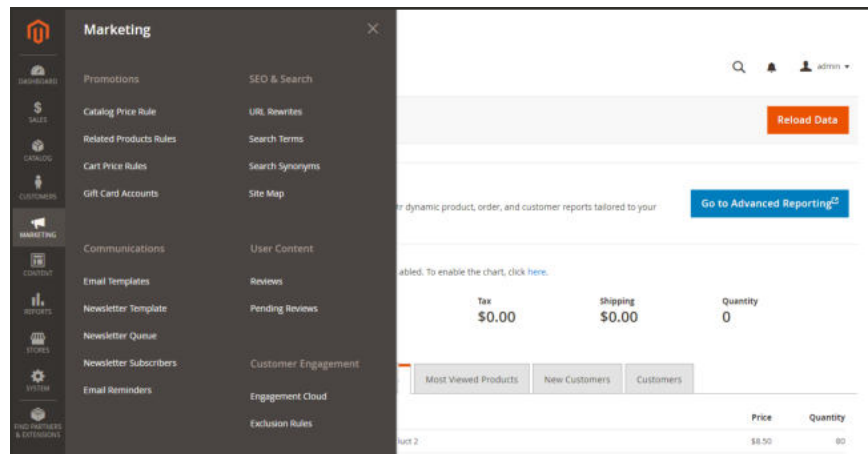
#### SEO & Search

#### Google Tools

## CHAPTER 20:

# Marketing Menu

The Marketing menu provides access tools for managing promotions, communications, SEO, user-generated content, and automated customer engagement.



*Marketing Menu*

### To display the Marketing menu:

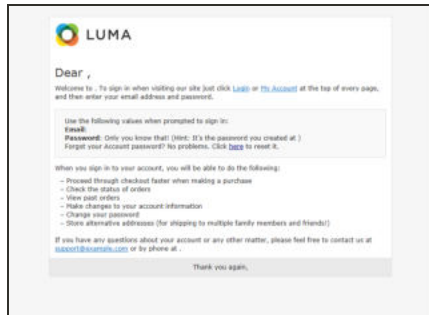
On the Admin sidebar, tap **Marketing**.

## Main Sections



### Promotions

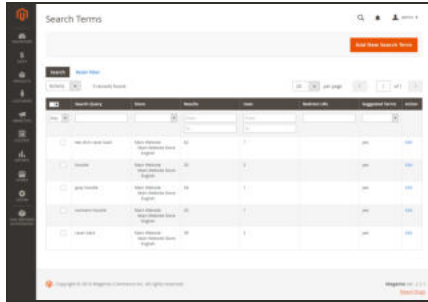
Create **catalog** and **cart** price rules that trigger discounts based on a variety of conditions. Set up promotions that spring into action when the required conditions are met.



### Communications

Customize all notifications sent from your store. Create **newsletters** and publish **RSS** feeds.

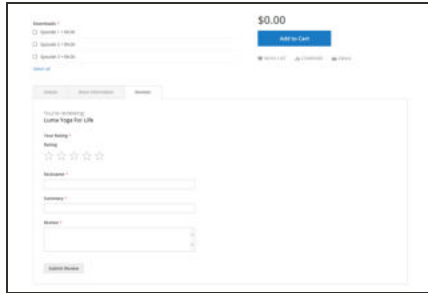




## SEO & Search

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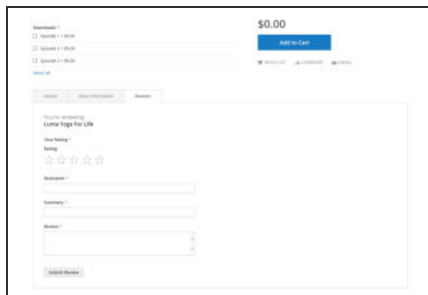
Analyze **search terms** and **synonyms** to help customers find products in the store, manage **meta data**, and create a **site map**. Use **redirects** to manage URL changes and avoid broken links.



## User Content

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Leverage user-generated product reviews to create a sense of community, and increase sales.



## Customer Engagement

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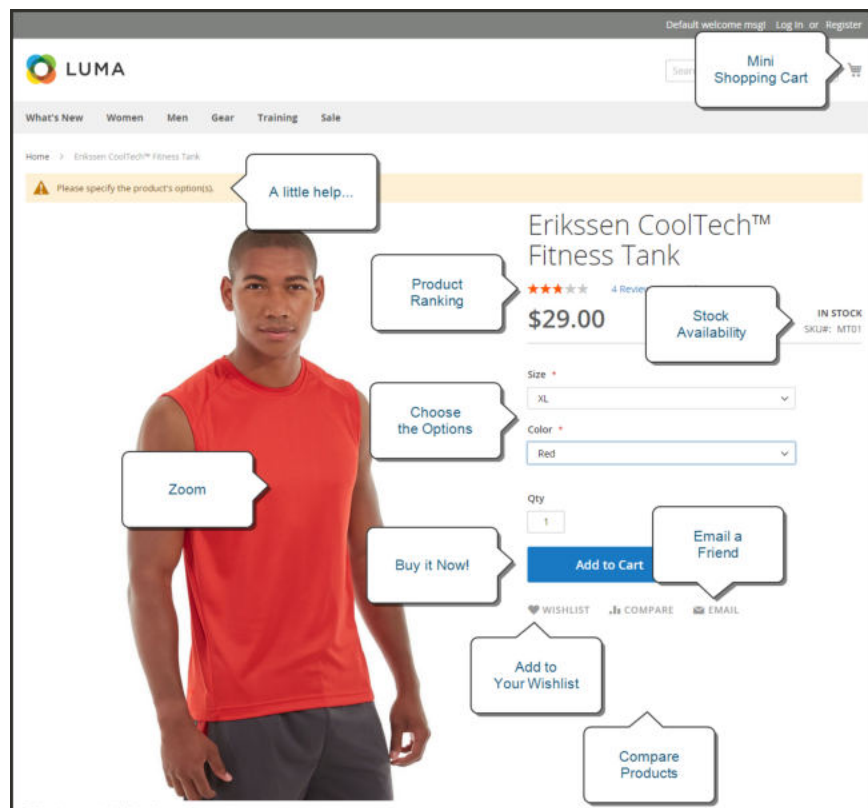
Create personalized, automated engagement campaigns that exceed customer expectations. Connect your data to boost ROI, and increase customer lifetime value.



## CHAPTER 21:

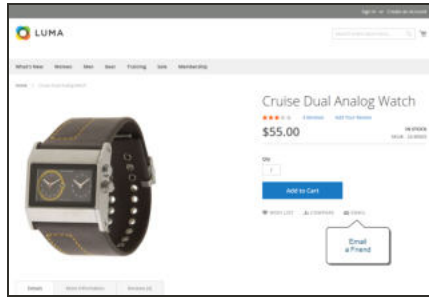
# Shopping Tools

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



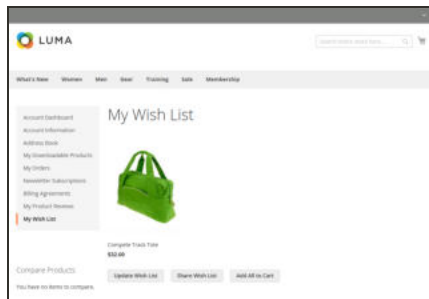
*Product Page*

# Opportunities to Engage



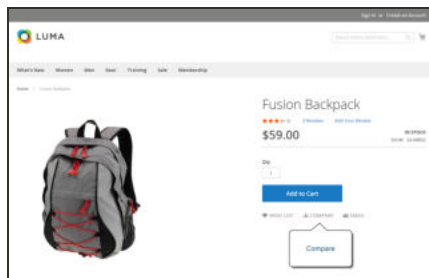
## Email a Friend

The Email a Friend link makes it easy for your customers to share links to products with their friends.



## Wish List

A wish list is a list of products that a registered customer can share with friends, or save to transfer to the cart at a later date.



## Compare Products

The Compare Products block lets your customers quickly compare the features of one product with another.

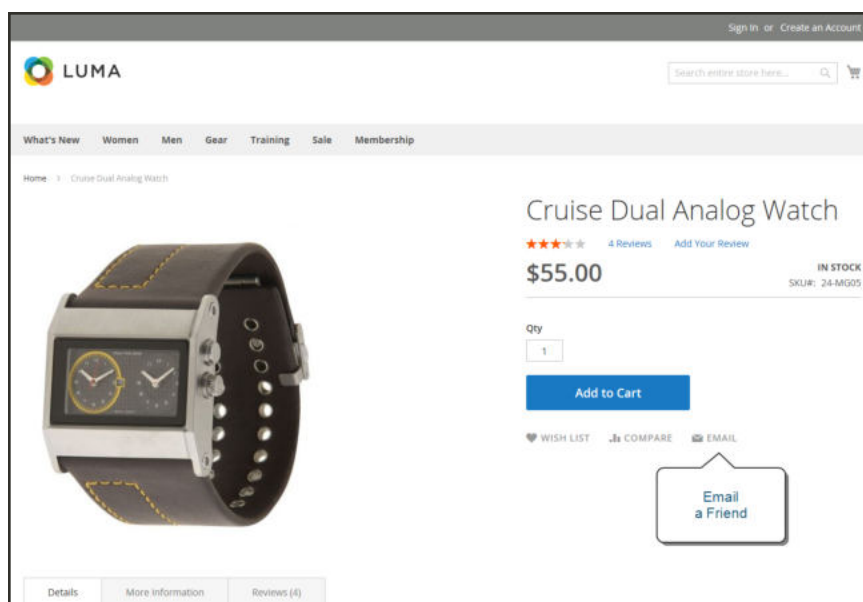


## Product Reviews

Product reviews help build a sense of community, and are considered to be more credible than any advertising money can buy.


## Email a Friend

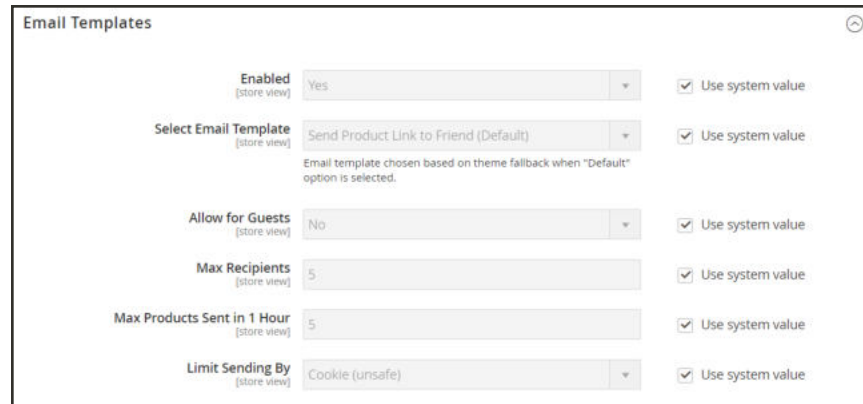
The Email a Friend link makes it easy for your customers to share links to products with their friends. In the Magento demo store, the Email a Friend link appears as an envelope icon. The message template can be customized for your voice and brand. To prevent spamming, you can limit the number of recipients for each email, and the number of products that can be shared over a one-hour period.



*Email a Friend*

### To configure Email a Friend:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Email to a Friend**.
3. Expand  the **Email Templates** section. Then, do the following:



*Email Templates*

- a. Set **Enabled** to “Yes.”
- b. Set **Select Email Template** to the template you want to use as the basis of the messages.
- c. If you want to require that only registered customers can send email to friends, set **Allow for Guests** to “No.”
- d. In the **Max Recipients** field, enter the maximum number of friends who can be on the distribution list for a single message.
- e. In the **Max Products Sent in 1 Hour** field, enter the maximum number of products that can be shared by a single user with friends over a one-hour time period.
- f. Set **Limit Sending By** to one of the following methods to identify the sender of emails:

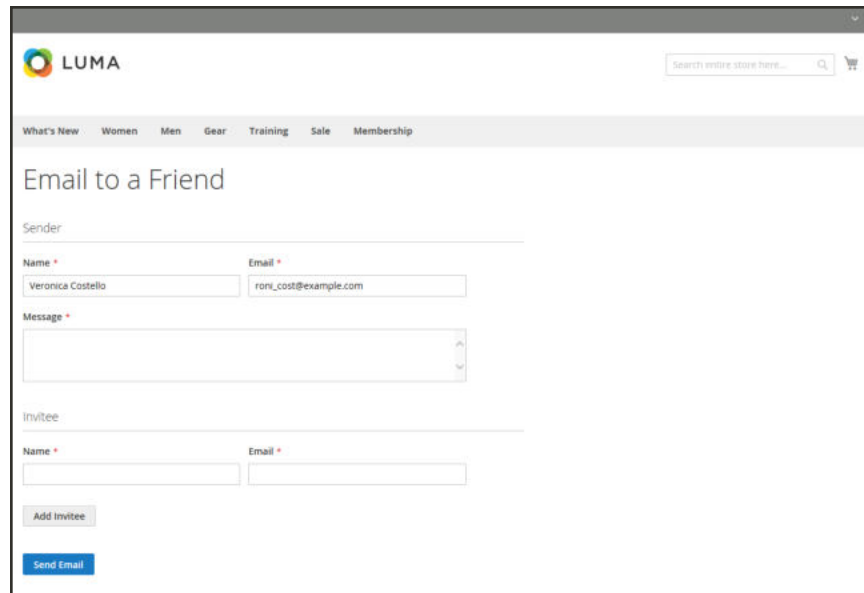
IP Address	(Recommended) Identifies the sender by the IP address of the computer that is used to send the emails.
Cookie (unsafe)	Identifies the sender by browser cookie. This method is less effective because the sender can delete the cookie to bypass the limit.

- 4. When complete, tap **Save Config.**

**To send email to a friend:**

1. On a catalog page, click the **Email a Friend** link. Then, do one of the following:
  - Log in to your customer account.
  - Sign up for a new account.
2. Complete the **Message** and enter the recipient **Name** and **Email Address**. To add more recipients, do the following:
  - a. Tap **Add Invitee**.
  - b. Enter the **Name** and **Email Address** of the additional person.

You can send the message to as many additional people as the configuration allows.
3. When ready to send the message, tap **Send Email**.

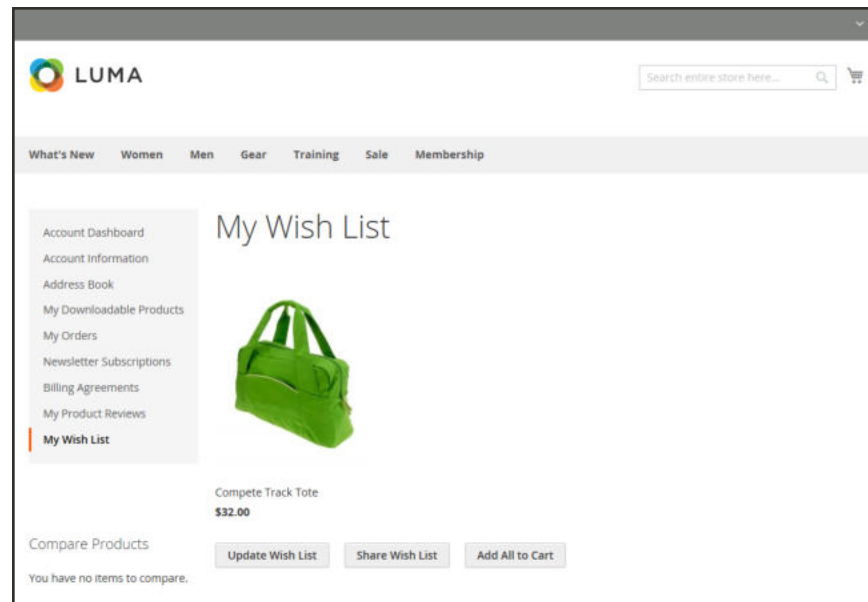
The screenshot shows the 'Email to a Friend' form on the LUMA website. At the top, there is a search bar and a shopping cart icon. Below the navigation menu, the form is titled 'Email to a Friend'. It is divided into two sections: 'Sender' and 'Invitee'. The 'Sender' section has fields for 'Name' (filled with 'Veronica Costello') and 'Email' (filled with 'roni\_cost@example.com'), followed by a 'Message' text area. The 'Invitee' section has fields for 'Name' and 'Email'. At the bottom of the form, there are two buttons: 'Add Invitee' and 'Send Email'.*Email a Friend Form*

## Wish Lists

A wish list is a list of products that a registered customer can share with friends, or save to transfer to the cart at a later date. When wish lists are enabled, the Add to Wishlist link appears in the sidebar of category and product pages. Depending on the theme, it might be a text link or a graphic image. If you prefer not to show customer wish lists in the side bar, they can be hidden from view in the [configuration](#).

Shared wish lists are sent from a store email address, but the body of the message contains a personalized note from the customer. You can customize the email template that is used when wish lists are shared, and choose the store contact that appears as the sender.

Wish lists can be updated from the dashboard of the [customer account](#). Items can be added or transferred between the wish list and cart by the customer or by the store administrator.



*Wish List in Customer Account*

When a product with multiple options is added to a wish list, any options that have been selected by the customer are included in the wish list item description. For example, if the customer adds the same pair of shoes, but in three different colors, each pair appears as a separate wish list item. On the other hand, if the customer adds the same product to the wish list multiple times, the product appears only once, but with an updated quantity that reflects the number of times the product was added.



## Configuring the Wish List

The configuration enables the wish list, and determines the email template and sender of email messages that are used when the wish list is shared. By default, a customer's wish list appears in the sidebar when shopping while logged in to their account.

### To configure the wish list:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Wish List**.
3. Expand ☺ the **General Options** section. Then, do the following:
  - a. Verify that **Enabled** is set to "Yes."
  - b. By default, the wish list appears in the sidebar of storefront pages. If you prefer to hide the wish list, set **Show in Sidebar** to "No."

The screenshot shows the 'General Options' section of the configuration interface. It contains two rows of settings:

- Enabled** (store view): A dropdown menu is set to 'Yes', and a checkbox labeled 'Use system value' is checked.
- Show in Sidebar** (store view): A dropdown menu is set to 'Yes', and a checkbox labeled 'Use system value' is checked.

*General Options*


4. Expand ☺ the **Share Options** section. Then, do the following:

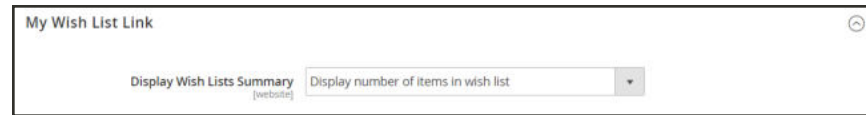
The screenshot shows the 'Share Options' section of the configuration interface. It contains four rows of settings:

- Email Sender** (store view): A dropdown menu is set to 'General Contact', and a checkbox labeled 'Use system value' is checked.
- Email Template** (store view): A dropdown menu is set to 'Wish List Sharing (Default)', and a checkbox labeled 'Use system value' is checked. Below the dropdown, it says: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Max Emails Allowed to be Sent** (store view): A text input field contains '10', and a checkbox labeled 'Use system value' is checked. Below the field, it says: '10 by default, Max - 10000'.
- Email Text Length Limit** (store view): A text input field contains '255', and a checkbox labeled 'Use system value' is checked. Below the field, it says: '255 by default'.

*Share Options*

- a. Set **Email Sender** to the store contact that appears as the sender of the message.
- b. Set **Email Template** to the template to be used when a customer shares a wish list.
- c. To limit the number of emails a customer can send in a batch, enter the **Max Emails Allowed to be Sent**. The default value is 10, and the maximum allowed is 10,000.
- d. To limit the size of the message, enter the **Email Text Length Limit**. The default value is 255.

5. Expand  the **My Wish List Link** section. Then, set **Display Wish Lists Summary** to one of the following:
  - Display number of items in wish list
  - Display item quantities

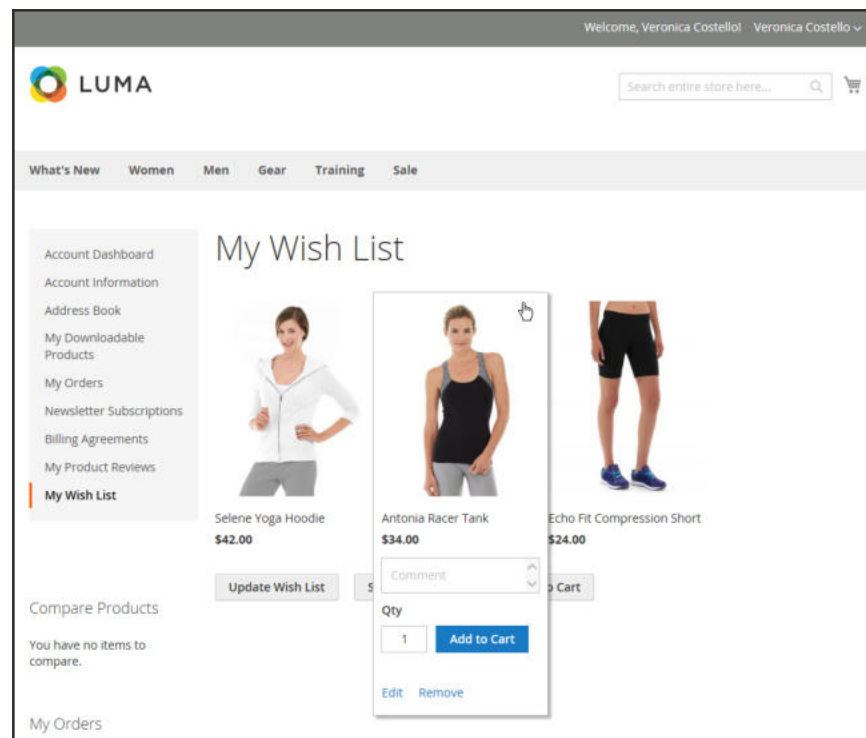


*My Wish List Link*

6. When complete, tap **Save Config.**

## Sharing a Wish List

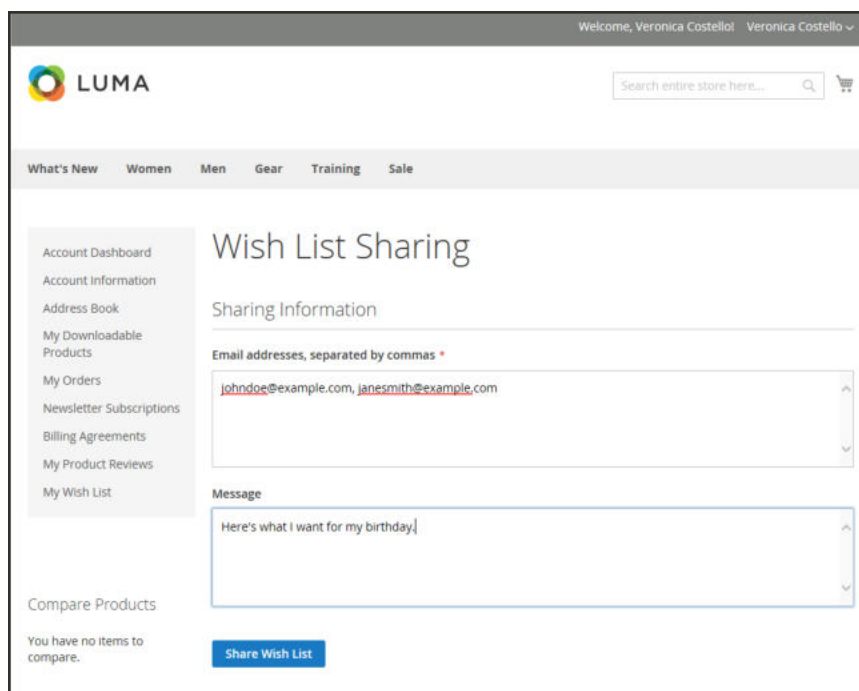
Customers can manage their wish lists from the dashboard of their accounts. Store administrators can also help customers manage their wish lists from the Admin.



*Customer Dashboard with Wish List*

### To share your wish list:

1. In the panel on the left of your customer account dashboard, choose **My Wish List**.
2. To add a comment to an item, hover over the image, and enter your **Comment** in the box.
3. To share your wish list, do the following:
  - a. Tap **Share My Wish List**.
  - b. Enter the email address of each recipient, separated by a comma.
  - c. Enter a **Message** for the body of the email.
4. When you're ready to send the message, tap **Share Wish List**.



*Customer Dashboard with Wish List*

### To transfer an item to your cart:

1. To add a single item, do the following:
  - a. Hover over the item., and enter the **Qty** that you want to add to the cart.
  - b. Tap **Add to Cart**.
2. To transfer all wish list items to the cart, tap **Add All to Cart**.

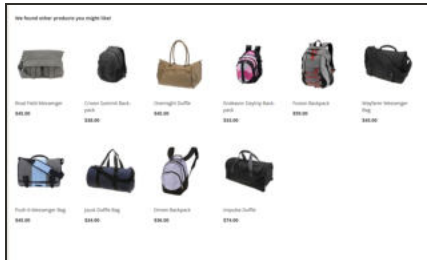
# Product Relationships

Products in your catalog can be promoted on other pages by defining the nature of the relationship between the products. The options available are: Up-sell products, Related products, and Cross-sell products.



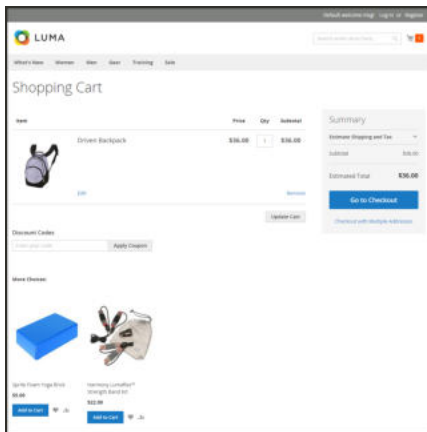
## Related Products

Related products are meant to be purchased in addition to the item the customer is viewing. They complement, enhance, or add optional features to the product.



## Up-sells

Up-sell products are items that are similar, but are perhaps of a higher-quality, more popular, or have a better profit margin than the item the customer is considering.



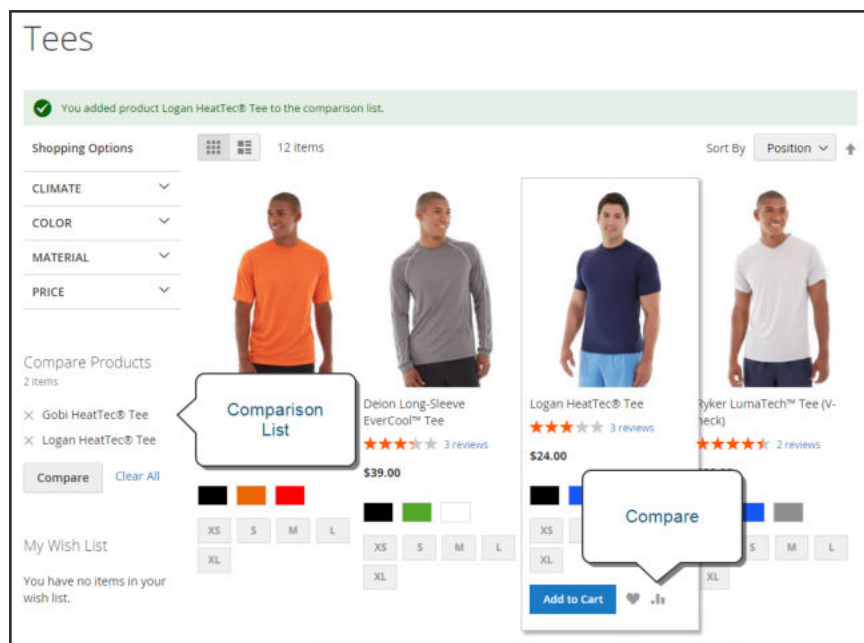
## Cross-sells

Cross-sell products are offered on the shopping cart page as last-minute purchases before the checkout process begins.

## Compare Products

Compare Products generates a detailed, side-by-side comparison of two or more products. Depending on the theme, the Add to Compare link might be represented by an icon or text. The Compare Products block usually appears in either the left or right sidebar of a catalog page.


Unlike the [Recently Viewed / Compared Products](#) block, the Admin does not include additional configuration settings for Compare Products.



*Compare Products*

### To compare products:







1. From your storefront, find the products that you want to compare, and click the **Compare** link for each.
2. Depending on the theme and page layout, there might be a Compare Products block in the sidebar. If so, you can mark the checkbox of the products to include in the report, and tap **Compare**. The Compare Products report opens in a new window.
3. To print the report, tap **Print This Page**.
4. After navigating to other pages, you can click the link in the header or sidebar to return to the report.
  - To remove a single product from the report, tap **Delete** ( × ).
  - To remove all products from the report, click the **Clear All** link.



---

## Compare Products

[Print This Page](#)


		
		
	<p><u>Gobi HeatTec® Tee</u></p> <p>★★★★★ <a href="#">3 Reviews</a></p> <p>\$29.00</p> <p><a href="#">Add to Cart</a></p> 	<p><u>Logan HeatTec® Tee</u></p> <p>★★★★★ <a href="#">3 Reviews</a></p> <p>\$24.00</p> <p><a href="#">Add to Cart</a></p> 
<b>SKU</b>	MS04	MS10
<b>Description</b>	<p>When the training gets intense, the Gobi HeatTec® Tee works as hard as you do to maintain your cool. The moisture-wicking material promises drier comfort, while breathable side panels deliver extra stretch that's sure to keep you moving.</p> <ul style="list-style-type: none"> <li>• Orange micropolyester shirt.</li> <li>• HeatTec® wicking fabric.</li> <li>• Crew neckline.</li> <li>• Machine wash/dry.</li> </ul>	<p>Soft and lightweight, the Logan HeatTec® Tee gets you through the long haul in total comfort. It boasts superior sweat-wicking performance to keep skin dry and cool, and strategic flat-lock seams to resist chafing.</p> <ul style="list-style-type: none"> <li>• Semi-fitted.</li> <li>• Crew neckline.</li> <li>• Machine wash/tumble dry.</li> </ul>

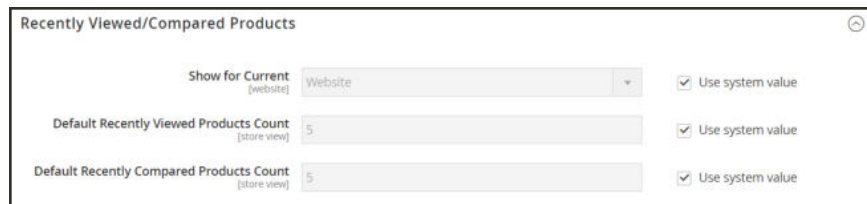
*Compare Products*

## Recently Viewed / Compared Products

The Recently Viewed and Recently Compared blocks usually appear in the right sidebar of a catalog page. The number of products listed in each block can be configured for each website, store, or store view.

### To configure Recently Viewed/Compared Products:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Recently Viewed/Compared Products** section. Then, do the following:



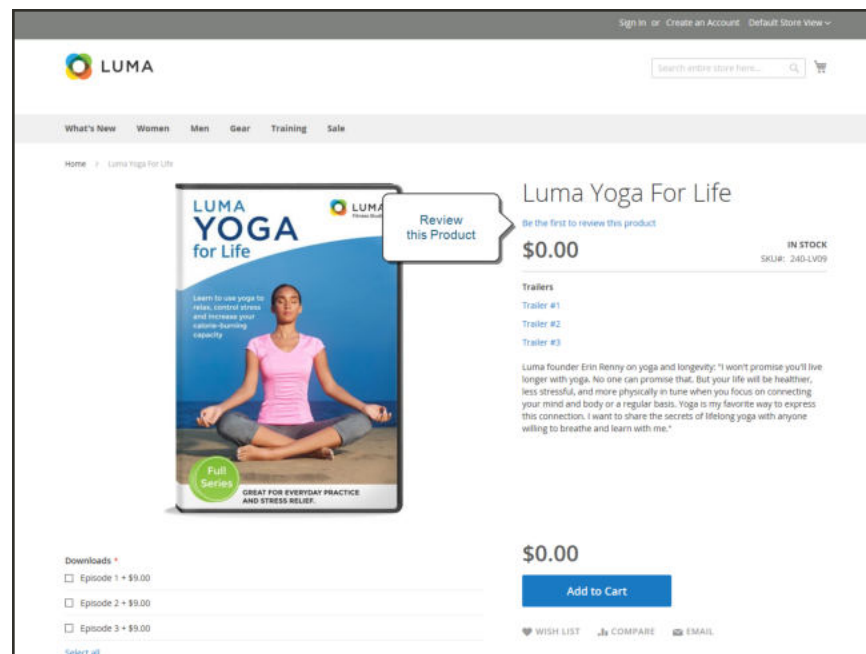
### *Recently Viewed/Compared Products*

- a. Set **Show for Current** to the website, store, or store view where the configuration applies.
  - b. In the **Default Recently Viewed Products Count** field, enter the number of recently viewed products to appear in the list.
  - c. In the **Default Recently Compared Products Count**, enter the number of recently compared products to appear in the list.
4. When complete, tap **Save Config.**

## Product Reviews

Product reviews help to build a sense of community, and are considered more credible than any advertising money can buy. In fact, some search engines give sites with product reviews a higher ranking than those without. For those who find your site by searching for a specific product, a product review is essentially the landing page of your store. Product reviews help people find your store, keep them engaged, and often lead to sales.

The configuration determines whether customers must open an account with your store before writing product reviews, or if they can submit reviews as guests. Requiring reviewers to open an account prevents anonymous submissions, and improves the quality of reviews.

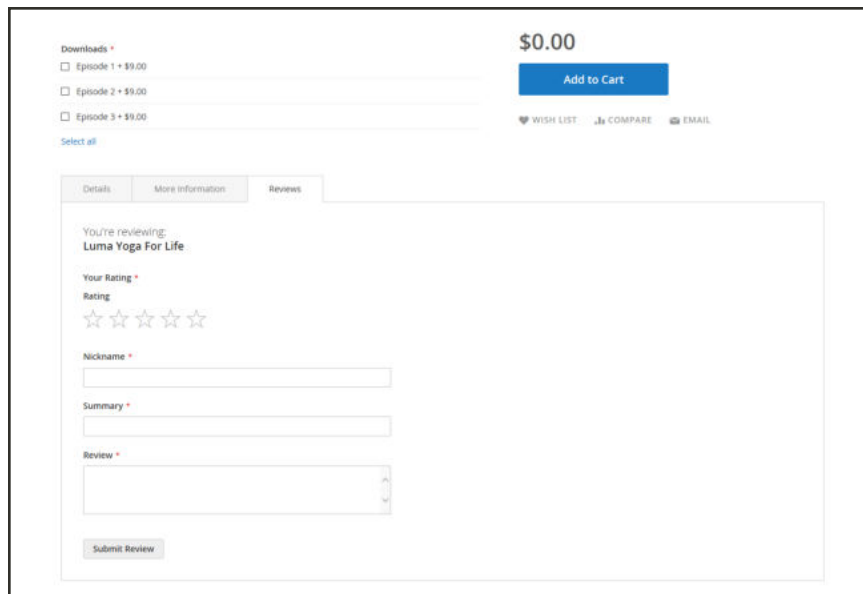


### *Add Your Review*

Customers can write reviews for any product in your catalog. Reviews can be written from the product page by clicking the “Add Your Review” link. For products that haven't been reviewed, the link says, “Be the first to review this product.” The Reviews tab lists all current reviews, and the form that is used to submit a review.

The number of stars indicates the satisfaction rating. Visitors can click the link to read the reviews and write their own. As an incentive, customers can receive reward points for submitting a review. When a review is submitted, it is sent to the Admin for moderation. When approved, the review is published in your store.





*Reviews Tab*

### To configure product reviews:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, select **Catalog**.
3. Expand ☺ the **Product Reviews** section.
4. Set **Allow Guests to Write Reviews** according to your preference.
5. When complete, tap **Save Config**.

### To moderate reviews:

1. On the Admin sidebar, tap **Marketing**. Then under **User Content**, choose **Reviews**.
2. In the list, click a pending review to view the details, and edit if necessary.
3. To approve a pending review, change the **Status** from “Pending” to “Approved.” To reject a review, select “Not Approved.”
4. When complete, tap **Save Review**.

## Ratings

When customers review a product, the default ratings are quality, price, and value. In addition to these, you can add your own custom ratings. The five-star ratings that appear on catalog pages are averaged for each product.

The screenshot shows a product review form for 'Mach Street Sweatshirt'. The form includes a 'Your Rating' section with five categories: Quality (5 stars), Price (4 stars), Value (4 stars), and Coolness Factor (5 stars). Below the ratings are input fields for 'Nickname', 'Summary', and 'Review', and a 'Submit Review' button.

*Ratings*

### To create your own ratings:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Ratings**.
2. In the upper-right corner, tap **Add New Rating**.

The screenshot shows the Magento Admin interface for managing ratings. The page title is 'Ratings'. There is a search bar, a 'Reset Filter' button, and a '4 records found' indicator. A table lists the existing ratings, and an 'Add New Rating' button is visible in the top right corner.

ID	Rating	Sort Order	Is Active
3	Price	0	Active
1	Quality	0	Active
4	Rating	0	Active
2	Value	0	Active

*Ratings*

3. In the Rating Title section, enter the **Default Value** for the new rating. If applicable, enter the translation for each store view.

The screenshot shows the 'Rating Title' configuration form. It includes a title bar 'Rating Title' and several input fields: 'Default Value' with a red asterisk, 'Default Store View', and three language-specific fields for 'French', 'German', and 'Spanish'.

*Rating Title*

4. In the Rating Visibility section, set **Visibility In** to the store view where the rating is to be used. (Hold down the Ctrl key to select multiple options.)

Ratings are not visible unless assigned to a store view.

5. In the **Sort Order** field, enter a number to determine the order of this rating when listed with others.

The screenshot shows the 'Rating Visibility' configuration form. It features a 'Visibility' dropdown menu with a question mark icon, currently displaying a list of store views: 'Main Website', 'Main Website Store', 'Default Store View', 'French', 'German', and 'Spanish'. Below the dropdown are an 'Is Active' checkbox and a 'Sort Order' input field.

*Rating Visibility*

6. When complete, tap **Save Rating**.

# Promotions

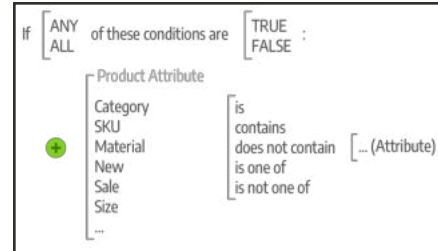
In this section of the guide, you will learn how to set up product relationships, and use price rules to trigger discounts based on a variety of conditions. You can use price rules to offer customer incentives, such as to:

- Send your best customers a coupon for a discount on a specific product
- Offer free shipping for purchases over a certain amount
- Schedule a promotion for a period of time

A rule is a collection of conditions (one or more) that apply changes in prices to products when one or all are met. Each rule can have multiple conditions, applying when all or any (one or more, but not all) statements are true or false.

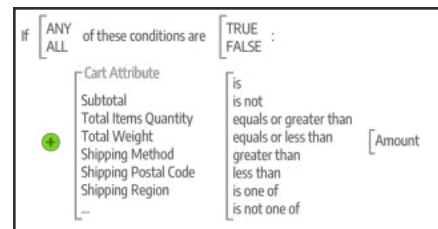
Conditions are statements that refine the list of products and situations for applying the rule. The attributes and options for conditions differ between the types of available rules. When met, the action is completed such as discounts, buy one get one free (BOGO), and other options. Rules can be simple or as complicated as need to match your business needs, seasonal discounts and promotions, and year long opportunities. For example, you may want to add a few more options for the holidays while providing free shipping year-round when carts have a high subtotal.

For **catalog price rules**, you build conditions based on **attribute sets** in your catalog, comparison functions, and selected attributes. You create the conditions like sentences by selecting a few statements. For example, you may create two price rules to apply discounts for childrens clothing and mens/womens clothing based on the category.



Example options for Catalog Price Rule

**Cart price rule** conditions can be based on any category that is a child of the store's **root**. Price rules are set up in advance, and spring into action whenever the required conditions are met. These rules use attributes including product attribute combination like matching a SKU in the cart using product attributes, product subselection like the total quantity matching conditions, condition combinations for complicated rules, and cart attributes like subtotal.



Example options for Cart Price Rule

## Contents

In this section of the guide, you will learn how to set up product relationships, and use price rules to trigger discounts based on a variety of conditions.

### Catalog Price Rules

#### Multiple SKUs

### Cart Price Rules

#### Coupon Codes

#### Coupon Report

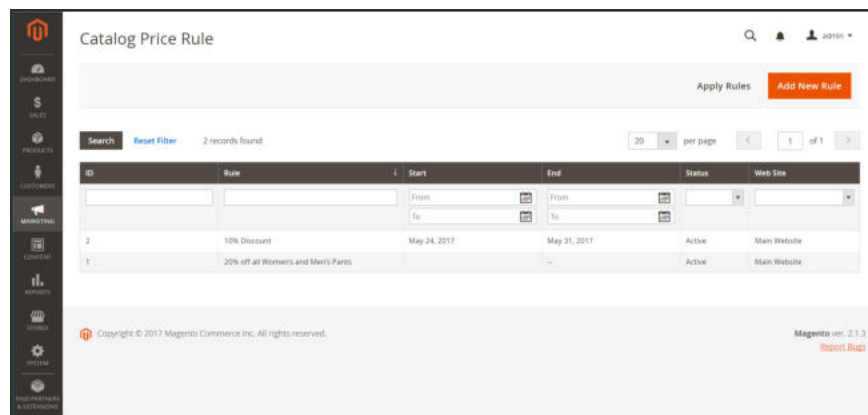
Free Shipping Promotion  
Buy X Get Y Free  
Discount with Minimum Purchase

## CHAPTER 22:

# Catalog Price Rules

Catalog price rules can be used to offer products to buyers at a discounted price, based on a set of defined conditions. Catalog price rules do not use **coupon codes**, because they are triggered before a product is placed into the shopping cart.

For example, you can define and set the conditions for a price rule that when met, automatically display products with a special or promotional price. Defined rule properties might include customer groups, product categories, a discount amount or percentage, product color, product size, or just about any product attribute set up in your store. You can set start and end dates for a price rule that automatically start and stop a promotion on the dates you define in the rule. The properties of a saved rule can be updated or modified as needed. For recurring promotions, you can even manually set a saved rule to Active or Inactive status each time you want to run the promotion.



*Catalog Rules*

If you have many rules created, you can filter the list by using the filter options at the top of each column. Complete your filter options and tap **Search** to narrow your list. To clear all filter options and display the complete list, tap **Reset Filter**.

### Filter Options

FIELD	DESCRIPTION
ID	Free-text field that filters the list for a specific rule ID number.
Rule	Free-text field that filters the list based on the rule name defined when the rule was created.
Start	Dynamic calendar fields (To: and From:) that filter the list based on the start date for the rule as defined when the rule was created.
End	Dynamic calendar fields (To: and From:) that filter the list based on the end date for the rule as defined when the rule was created.
Status	Drop-down field that filters the list based on rule status, Active or Inactive.
Website	Drop-down field that filters the list based on websites defined for a rule.

To update a rule's properties, click on the rule in the list. The Rule Information screen displays, and you can change the settings for the rule (similar to creating a new rule).



## Creating a Catalog Price Rule

Follow these instructions to apply a discount to specific products whenever a set of conditions is met. Catalog price rule discounts go into effect before the product is placed into the shopping cart.

**Process Overview:**

Step 1: **Add a New Rule**

Step 2: **Define the Conditions**

Step 3: **Define the Actions**

Step 4: **Apply and Test the Rule**

### Step 1: Add a New Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Catalog Price Rule**.
2. In the upper-right corner, tap **Add New Rule**.

The Rule Information section displays, with expandable sections for Conditions and Actions.

The screenshot shows the 'Rule Information' form with the following fields and values:

- Rule Name:** (Empty text input)
- Description:** (Empty text area)
- Status:** Active (Dropdown menu)
- Websites:** Website 1 (Dropdown menu)
- Customer Groups:** NOT LOGGED IN, General, Wholesale, Retailer (List of checkboxes)
- From:** (Date picker)
- To:** (Date picker)
- Priority:** (Text input)

*Rule Information*

3. In the **Rule Information** section, do the following:
  - a. Complete the **Rule Name** and **Description** fields. These fields are for your internal reference only.
  - b. Set the **Status** of the price rule as needed. By default, the status is "Active."

Once created, a rule status can be updated by changing the status to "Active" or "Inactive" as needed.

- c. Select the **Websites** where the rule is to be available.
  - d. Select the **Customer Groups** to which this rule applies.

To choose multiple groups, hold down the Ctrl key (PC) or the Command key (Mac), and click each option.

The options in this list is dependent on the customer groups created and managed in the Admin > Customers > Customer Groups section.

- e. Enter the **From** and **To** dates to determine when the price rule is in effect. You can either enter the dates, or choose the dates from the **Calendar** (📅).
  - If you leave the dates blank, the rule is enabled as soon as the price rule is saved.
- f. Enter a number to establish the **Priority** of this rule in relation to other rules.

The Priority setting is important when the same catalog product meet the conditions set for more than one price rule. The rule with the highest Priority setting (1 being the highest) will become active for the product.

### Step 2: Define the Conditions

Most of the available conditions are based on existing attribute values. To apply the rule to all products, leave the conditions blank.

1. Scroll down and expand ☺ the **Conditions** section. The first rule begins:



Condition - Line 1

The statement has two bold links, which when tapped, display the options for that part of the statement. If you save the condition without making additional selections, the rule applies to all products.

- Tap the **ALL** link, and chose either “ALL” or “ANY.”
- Tap the **TRUE** link, and choose either “TRUE” or “FALSE.”
- To apply the rule to all products, leave the condition unchanged.

You can create different conditions by changing the combination of these values. For this example, the following condition is used:

If ALL of these conditions are TRUE:

2. Tap the **Add** (+) button at the beginning of the next line. Select an option for the condition, such as a product attribute or combination.

- a. In the list under **Product Attribute**, choose the attribute that you want to use as the basis of the condition. For this example, the condition is "Attribute Set."



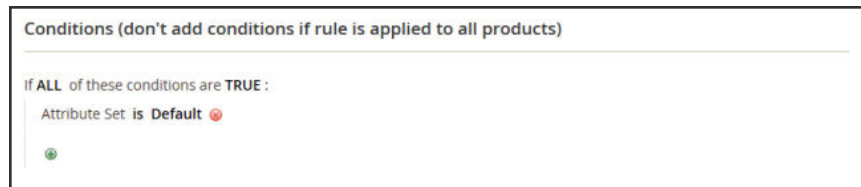
Condition Line 2, Part 1

For an attribute to appear in the list, it must be configured to be used in promo rule conditions. To learn more, see: [Product Attributes](#).

The selected condition appears in the statement, followed by two more bold links. The options differ depending on the condition attribute you select. The statement now says:

If ALL of these conditions are TRUE:  
 Attribute Set is ...

- b. Tap the **is** link, and choose the comparison operator that describes the condition to be met. These options may include option for different comparisons such as matching values, not including or including at least one of a value, and great than, equal to, and less than a numerical amount. In this example, the options are "is" and "is not."
- c. Select or enter values for the condition. Depending on the condition, you may select products from a grid or list, enter a numerical value, and so on. For this example, tap the (...) "more" link, and choose the attribute set upon which the condition is based.



Condition Line 2, Part 3

The selected item appears in the statement to complete the condition.

If ALL of these conditions are TRUE:  
 Attribute Set is Default

- 3. To add another condition line to the statement, tap the **Add (+)** button, and choose one of the following:

- Conditions Combination
- Product Attribute

Then, repeat the process until all desired conditions are complete.

If at any time you want to delete part of the condition statement, tap the **Delete** (✖) button at the end of the line.

### Step 3: Define the Actions

1. Expand ☺ the **Actions** section, and do the following:



*Actions*

2. Under **Pricing Structure Rules**, set **Apply** to one of the following:

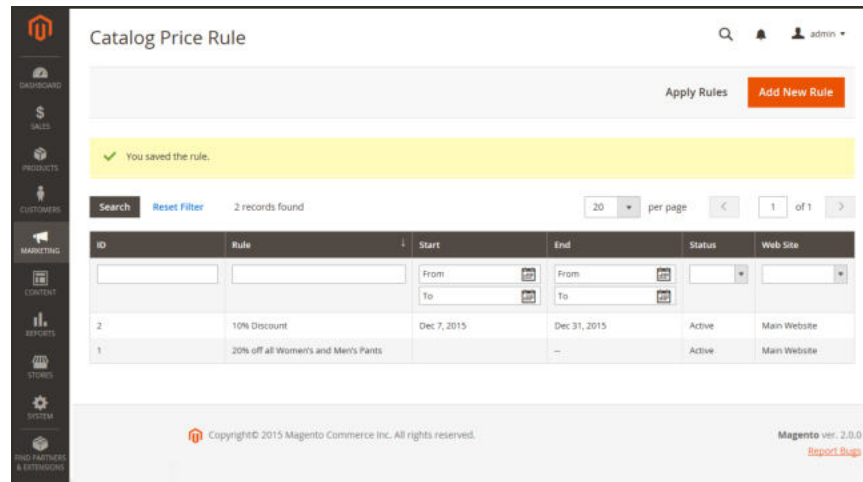
Apply as percentage of original	Discounts item by subtracting a percentage of the regular* price. For example: Enter 10 in Discount Amount for an final** price that is marked down 10% from the regular price.
Apply as fixed amount	Discounts item by subtracting a fixed amount from the regular price. For example: Enter 10 in Discount Amount for a final price that is \$10 less than the regular price.
Adjust final price to this percentage	Adjusts the final price by a percentage of the regular price. For example: Enter 50 in Discount Amount for a final price that is marked down 50% from the regular price.
Adjust final price to discount value	Sets the final price to a fixed, discounted amount. For example: Enter 20 in Discount Amount for a final price of \$20.00.

\* Regular price refers to the base product price without any advanced pricing (special/tier/group) or promotional discounts.

\*\* Final price refers to the discounted price that appears in the shopping cart.

3. Enter the **Discount Amount**.
4. To stop processing other rules after this rule is applied, set **Discard Subsequent Rules** to “Yes.”

Setting this to "Yes" safeguard prevents the system from applying multiple discounts (rules) to the same product.



*Pricing Structure Rules*

### Step 4: Apply and Test the Rule

To apply the rule, do one of the following:

- Tap **Save and Apply**.
- Tap **Save**. Then from the Catalog Price Rules page, tap **Apply Rules**.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. As new rules are added, Magento recalculates the prices and the priorities accordingly.

## Field Descriptions

FIELD	DESCRIPTION						
<b>RULE INFORMATION</b>							
Rule Name	(Required) The name of the rule is for internal reference.						
Description	A description of the rule should include the purpose of the rule, and explain how it is used.						
Status	(Required) Determines if the rule is currently active in the store. Options: Yes / No						
Websites	(Required) Identifies the websites where the rule can be used.						
Customer Groups	(Required) Identifies the customer groups to which the rule applies.						
From	Specifies the first day the price rule is in effect. If left blank, the price rule goes into effect as soon as it is saved.						
To	Specifies the last day the price rule is in effect. If left blank, the price rule continues indefinitely.						
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.						
<b>CONDITIONS</b>							
	Specifies the conditions that must be met before the catalog price rule goes into action. If left blank, the rule applies to all products.						
<b>ACTIONS</b>							
Apply	Determines the type of calculation that is applied to the purchase. Options: <table border="0" style="margin-left: 20px;"> <tr> <td style="padding-right: 20px;">Apply as percentage of original</td> <td>Discounts item by subtracting a percentage of the regular* price.</td> </tr> <tr> <td style="padding-right: 20px;">Apply as fixed amount</td> <td>Discounts item by subtracting a fixed amount from the regular price.</td> </tr> <tr> <td style="padding-right: 20px;">Adjust final price to this percentage</td> <td>Adjusts the final price by a percentage of the regular price.</td> </tr> </table>	Apply as percentage of original	Discounts item by subtracting a percentage of the regular* price.	Apply as fixed amount	Discounts item by subtracting a fixed amount from the regular price.	Adjust final price to this percentage	Adjusts the final price by a percentage of the regular price.
Apply as percentage of original	Discounts item by subtracting a percentage of the regular* price.						
Apply as fixed amount	Discounts item by subtracting a fixed amount from the regular price.						
Adjust final price to this percentage	Adjusts the final price by a percentage of the regular price.						

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
	<p>Adjust final price to discount value</p> <p>Sets the final price to a fixed, discounted amount.</p> <p>*Regular price refers to the base product price without any advanced pricing (special/tier/group) or promotional discounts.</p> <p>**Final price refers to the discounted price that appears in the shopping cart.</p>
Discount Amount	(Required) The amount of discount that is offered.
Discard Subsequent Rules	Determines if additional rules can be applied to this purchase. To prevent multiple discounts from being applied to the same purchase, select "Yes." Options: Yes / No



## Price Rule with Multiple SKUs

A single price rule can be applied to multiple SKUs, which makes it possible to create a variety of promotions based on a product, brand, or category. When creating this rule, you want to set conditions to match any products of selected SKUs. When building the rule, you can easily browse and select SKUs without needing to know all of your product SKUs from memory.

### Step 1: Verify Storefront Properties of Attribute

Before you begin, make sure that the Storefront Properties of the SKU attribute are set to "Use in Promo Rules."

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. In the search filter at the top of the **Attribute** Column, enter "sku." Then, tap **Search**.
3. Click to open the attribute in edit mode.
4. In the panel on the left, choose **Storefront Properties**. Then, make sure that **Use for Promo Rule Conditions** is set to "Yes."
5. If you changed the value of the property, tap **Save Attribute**.

### Step 2: Apply a Price Rule to Multiple SKUs

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Do one of the following:
  - Follow the instructions to create a **cart price rule**.
  - Open an existing cart price rule.
3. Expand ☺ the **Conditions** section, and do the following:
  - a. In the first line, set the first parameter to "ANY."



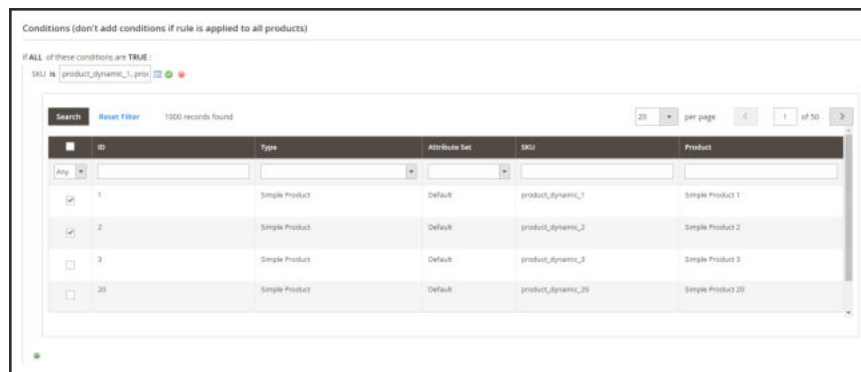
*If ANY of these conditions are TRUE*

- b. Tap **Add** (+) at the beginning of the next line. Then, in the list under **Product Attribute**, choose **SKU**.



*SKU is one of ...*

- c. For the comparison, you have options. If you want to locate at least one from a list of SKUs, select **is one of**. If you want to locate a group of SKUs that all must be found to apply, select **is**. We recommend selecting **is one of**.
- d. To complete the condition, click the (...) “more” link. Then, tap the **Chooser** button for the list of available products.



*Choose Each SKU*

- e. Browse, filter, or search to find the SKUs you want to add. In the list, mark the checkbox of each product that is to be included. Then, tap **Save and Apply** to add the SKUs to the condition.



*Multiple SKUs Added to Condition*

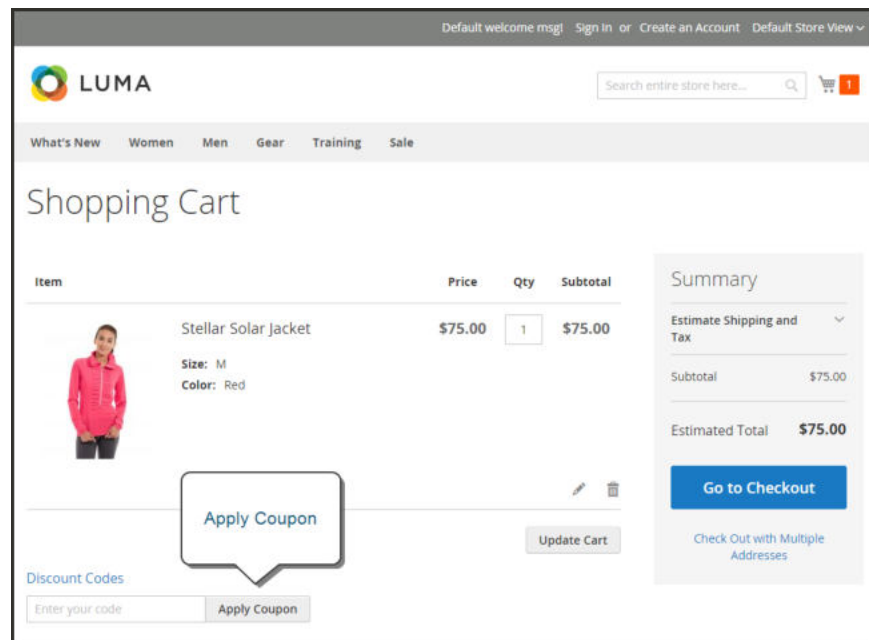
- 4. Complete the rule, including any **Actions** to be taken when the conditions are met.
- 5. When complete, tap **Save**.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.

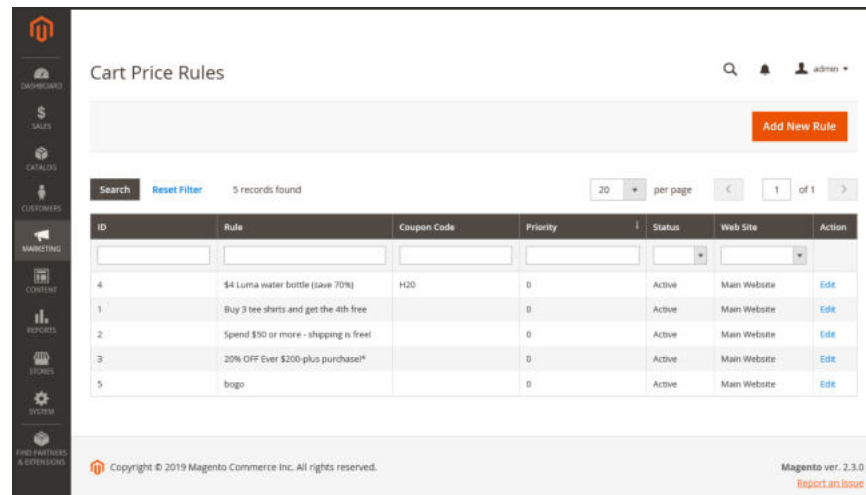
## CHAPTER 23:

# Cart Price Rules

Cart price rules apply discounts to items in the shopping cart, based on a set of conditions. The discount can be applied automatically as soon as the conditions are met, or when the customer enters a valid coupon code. When applied, the discount appears in the cart under the subtotal. A cart price rule can be used as needed for a season or promotion by changing its status and date range.



*Apply Coupon in Cart*



### Cart Price Rules

If you have many rules created, you can filter the list by using the filter options at the top of each column. Complete your filter options and tap **Search** to narrow your list. To clear all filter options and display the complete list, tap **Reset Filter**.

### Filter Options

FIELD	DESCRIPTION
ID	Free-text field that filters the list for a specific rule ID number.
Rule	Free-text field that filters the list based on the rule name defined when the rule was created.
Coupon Code	Free-text field that filters the list based on the code name defined when the rule was created.
Start	Dynamic calendar fields (To: and From:) that filter the list based on the start date for the rule as defined when the rule was created.
End	Dynamic calendar fields (To: and From:) that filter the list based on the end date for the rule as defined when the rule was created.
Status	Drop-down field that filters the list based on rule status, Active or Inactive.
Website	Drop-down field that filters the list based on websites defined for a rule.
Priority	Free-text field that filters the list based on the priority defined for a rule.

To update a rule's properties, click on the rule in the list. The Rule Information screen displays, and you can change the settings for the rule (similar to creating a new rule).

## Create a Cart Price Rule

Complete the following steps to add a new rule, describe the conditions, and define the actions. Then, complete the labels, and test the rule.

### Process Overview:

Step 1: [Add a New Rule](#)

Step 2: [Describe the Conditions](#)

Step 3: [Define the Actions](#)

Step 4: [Complete the Labels](#)

Step 5: [Save and Test the Rule](#)

### Step 1: Add a New Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Tap **Add New Rule**. Then, do the following:
  - a. Under **Rule Information**, complete the **Rule Name** and **Description**.
  - b. If you do not want the rule to go into effect immediately, set **Active** to “No.”

The screenshot shows the 'New Cart Price Rule' configuration page. The 'Rule Information' section includes the following fields and options:

- Rule Name:** A text input field.
- Description:** A larger text area.
- Active:** A toggle switch set to 'Yes'.
- Websites:** A selection box currently showing 'Main Website'.
- Customer Groups:** A selection box with options: 'NOT LOGGED IN', 'General', 'Wholesale', and 'Retailer'.
- Coupon:** A dropdown menu set to 'No Coupon'.
- Uses per Customer:** A text input field with a note: 'Usage limit enforced for logged in customers only.'
- From:** A date selection field.
- To:** A date selection field.
- Priority:** A text input field.
- Public in RSS Feed:** A toggle switch set to 'Yes'.

Below the 'Rule Information' section are expandable sections for 'Conditions', 'Actions', 'Labels', and 'Manage Coupon Codes'.

### *Rule Information*

3. To establish the **scope** of the rule, do the following:
  - a. Select the **Websites** where the promotion is to be available.
  - b. Select the **Customer Groups** to which the promotion applies.
    - If you want the promotion to be available only to registered customers, do not choose the “NOT LOGGED IN” option.
4. To have the cart rule applied to all cart items, set **Coupon** to "No Coupon" and skip to step 5. To associate a **coupon** with a price rule, set **Coupon** to “Specific Coupon.” Then, do the following:

Coupon Settings

- a. Enter a free-text **Coupon Code** that the customer must enter to receive the discount.
- b. To set a limit on the number of times the coupon can be used, complete the following:

Uses per Coupon                      Determines how many times the coupon code can be used. If there is no limit, leave the field blank.

Uses per Customer                    Determines how many times the coupon code can be used by the same registered customer who belongs to any of the selected customer groups. The setting does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. If there is no limit, leave the field blank.

To learn more, see: [Coupon Codes](#).

- c. Use the **Calendar** (📅) to choose the **From** and **To** date range for the promotion.
5. To set a limit on the number of times the coupon can be used, complete the following:

Uses per Customer                    Determines how many times the coupon code can be used by the same registered customer who belongs to any of the selected customer groups. The setting does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. If there is no limit, leave the field blank.

- 6. Enter a number to define the **Priority** of this price rule in relation to the Action settings of other price rules which are active at the same time.

The Priority setting is important when two cart rules/coupon codes are valid for the same product at the same time. The rule with the highest Priority setting (1 being the highest) will control the cart action.

- 7. To apply the rule to published **RSS feeds**, set **Public In RSS Feed** to “Yes.”

8. This is a good time to save your work. Tap **Save and Continue Edit**.

After the rule is saved, the name of the cart price rule appear at the top of the page.



## Step 2: Describe the Conditions

In this step, the conditions are described that must be met for an order to qualify for the promotion. The rule goes into action whenever the set of conditions is met.



*Conditions*

1. In the panel on the left, select **Conditions**. The first rule appears by default, and states:

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

The statement has two bold links which when tapped, display the selection of options for that part of the statement. You can create different conditions by changing the combination of these values. Do any of the following:

- Click the **ALL** link, and select “ALL” or “ANY.”
  - Click the **TRUE** link and select “TRUE” or “FALSE.”
  - Leave the condition unchanged to apply the rule to all products.
2. Click **Add** ( + ) at the beginning of the next line. Select an option for the condition, such as cart attribute, product subselection, or combination. For this example, complete the next part of the condition as follows:
    - a. When prompted to **Choose the condition to add**, choose "Products Subselection."



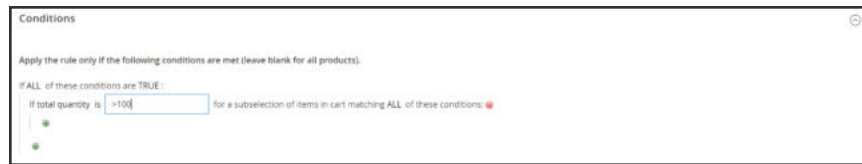
*Products Subselection*

- b. When the next part of the condition appears, mouse over the line so you can see where each link with variable values is located.



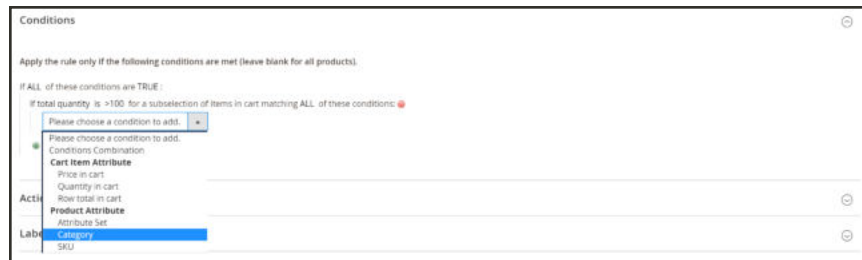
*If ALL of these conditions are TRUE*

- c. Click the "more" (...) link, and enter ">100." This condition requires the total quantity of the cart to be greater than 100.



*Total Quantity Value*

- 3. Click **Add** (+) at the beginning of the next line. Then add a condition that is based on **Category**.



*Category*

- a. In the next part of the condition, click the "more" (...) link to display the input field. Then, open the **Chooser** ( ) to display the category tree.
- b. Mark the checkbox of the category that you want to use as a condition for the price rule. The condition can be based on any category that is a child of the store's **root category**.



*Choosing a Category for a Condition*

4. To add more conditions, click **Add** (+) and define another condition.

You can repeat the process as many times as needed to describe the conditions that must be met for the price rule. Here are some examples:

### Example 1: Regional Price Rule

To create a regional price rule, use one of the following cart attributes:

- Shipping Postcode
- Shipping Region
- Shipping State/Province
- Shipping Country

### Example 2: Shopping Cart Totals

To base the condition on shopping cart totals, use one of the following cart attributes:

- Subtotal
- Total Items Quantity
- Total Weight

### Step 3: Define the Actions

The shopping cart price rule actions describe how prices are updated when the conditions are met.

1. Scroll down to **Actions**, and expand ☺ the section. Then, do the following:

*Cart Price Rule Actions*

- a. Set **Apply** to one of the following discount options:

Percent of product price discount	Discounts item by subtracting a percentage from the original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Fixed amount discount	Discounts item by subtracting a fixed amount from the original price of each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.
Fixed amount discount for whole cart	Discounts the entire cart by subtracting a fixed amount from the cart total. For example: Enter 10 in Discount Amount to subtract \$10 from the cart total. By default, the discount applies only to the cart subtotal. To apply the discount to the subtotal and shipping separately, see <a href="#">Apply to Shipping Amount</a> .
Buy X get Y free	Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)

- b. Enter the **Discount Amount** as a number, without symbols. For example, depending on the discount option selected, the number 10 might indicate a percentage, a fixed amount, or a quantity of items.
- c. For a "Buy X get Y Free" discount, enter the quantity in the **Discount Qty Step (Buy X)** field that the customer must purchase to receive the discount.
- d. In the **Maximum Qty Discount is Applied To** field, enter the maximum quantity of the same product that can qualify for the discount in the same purchase.

- e. Set **Apply to Shipping Amount** (  ) as follows:
    - Yes Applies the discount amount separately to the subtotal and shipping amounts.
    - No Applies the discount amount only to the subtotal.
  - f. To stop processing other rules after this rule is applied, set **Discard Subsequent Rules** (  ) to “Yes.” This safeguard prevents customers from receiving multiple discounts for the same product.
  - g. To determine if free shipping is applied to orders that meet the conditions, set **Free Shipping** to one of the following:
    - No Free shipping is not available.
    - For matching items only Free shipping is available only for items that match the conditions of the rule.
    - For shipment with matching items Free shipping is available for any shipment that includes matching item(s).
  - h. In the **Add Rewards Points** field, enter the number of points the customer earns whenever the cart price rule is applied. (If reward points aren’t enabled, leave this field blank.)
2. Define as many additional conditions as needed for the action.
  3. When complete, tap **Save and Continue Edit**.

### Step 4: Complete the Labels

The label appears in the totals section of the order to identify the discount. The label text is enclosed in parentheses, after the word, “Discount”. You can enter a default label for all store views, or enter a different label for each view.

Subtotal	\$112.00
Shipping & Handling	\$0.00
Discount (Special)	-\$15.00
Tax	\$8.00
<b>Grand Total</b>	<b>\$105.00</b>

*Discount Label in Totals Section of Order*

1. Scroll down to **Labels**, and expand  the section.
2. Enter the text that you want used as the **Default Rule Label for All Store Views**.

Labels ✎

Default Rule Label for All Store Views

*Default Label*

3. If your store has multiple views, or multiple websites with multiple views, enter the appropriate label text for each. For example, if each store view is in a different language, enter the translation of the label for each view.

Store View Specific Labels ?

Main Website

Main Website Store

English	<input type="text" value="Special"/>
French	<input type="text" value="Spécial"/>
German	<input type="text" value="Besondere"/>
Spanish	<input type="text" value="Especial"/>

### Step 5: Save and Test the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. As new rules are added, Magento recalculates the prices and the priorities accordingly.

### Field Descriptions

FIELD	DESCRIPTION										
<b>RULE INFORMATION</b>											
Rule Name	(Required) The name of the rule is for internal reference.										
Description	A description of the rule should include the purpose of the rule, and explain how it is used.										
Active	(Required) Determines if the rule is currently active in the store. Options: Yes / No										
Websites	(Required) Identifies the websites where the rule can be used.										
Customer Groups	(Required) Identifies the customer groups to which the rule applies.										
Coupon	(Required) Indicates if a coupon is associated with the rule. Options: <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">No Coupon</td> <td>No coupon is associated with the rule.</td> </tr> <tr> <td>Specific Coupon</td> <td>A specific coupon is associated with the rule.                             <table border="0" style="width: 100%;"> <tr> <td style="width: 20%;">Coupon Code</td> <td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td> </tr> <tr> <td>Use Auto Generation</td> <td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td> </tr> </table> </td> </tr> <tr> <td>Auto</td> <td>Displays the Coupons Information section to define the format of the coupon codes to be generated.</td> </tr> </table>	No Coupon	No coupon is associated with the rule.	Specific Coupon	A specific coupon is associated with the rule. <table border="0" style="width: 100%;"> <tr> <td style="width: 20%;">Coupon Code</td> <td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td> </tr> <tr> <td>Use Auto Generation</td> <td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td> </tr> </table>	Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.	Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.	Auto	Displays the Coupons Information section to define the format of the coupon codes to be generated.
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Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.										
Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.										
Auto	Displays the Coupons Information section to define the format of the coupon codes to be generated.										
Uses per Customer	Determines how many times the coupon code can be used by the same registered customer who belongs to any selected customer group. Does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. For no limit, leave blank.										
From	The first date the coupon can be used.										
To	The last date the coupon can be used.										

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.
Public in RSS Feed	Determines if the promotion is included in your store’s public RSS feed. Options: Yes / No.

**CONDITIONS**

	Specifies the conditions that must be met before the cart price rule goes into action. If left blank, the rule applies to all products in the cart.
--	---

**ACTIONS**

Apply	Determines the type of calculation that is applied to the purchase. Options:
Percent of product price discount	Discounts item by subtracting a percentage from the original price. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Fixed amount discount	Discounts item by subtracting a fixed amount from the original price of each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.
Fixed amount discount for whole cart	Discounts the entire cart by subtracting a fixed amount from the cart subtotal. For example: Enter 10 in Discount Amount to subtract \$10 from the cart subtotal. By default, the discount applies only to the cart subtotal. To apply the discount to the subtotal and shipping separately, see <a href="#">Apply to Shipping Amount</a> .
Buy X Get Y Free (discount amount is Y)	Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)
Discount Amount	(Required) The amount of discount that is offered.





## Coupon Codes

Coupons codes are used with **cart price rules** to apply a discount when a set of conditions is met. For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount. To apply the coupon to a purchase, the customer can enter the coupon code in the cart, or possibly at the cash register of your “brick and mortar” store. Here are a few ways that you can use coupons in your store:

- Email coupons to customers
- Produce printed coupons
- Create in-store coupons for mobile users

Coupon codes can be sent by email, or included in newsletters, catalogs, and advertisements. The list of coupon codes can be exported and sent to a commercial printer. You can also create in-store coupons with a quick response code that shoppers can scan with their smart phones. The QR code can link to a page on your site with more information about the promotion.

### Method 1: Create a Specific Coupon

1. Follow the instructions to create a **cart price rule**.
2. On the General Information page, set **Coupon** to “Specific Coupon.”
  - a. Enter a **Coupon Code** to be used with the promotion.  
 The format of the code as numeric, alphanumeric or alphabetical is determined by the **configuration**.
  - b. To limit the number of times the coupon can be used, complete the following:
    - Uses per Coupon
    - Uses per Customer

For unlimited use, leave these fields blank.

*Coupon Information*

- c. To make the coupon valid for a period of time, complete the **From** and **To** dates. To select the date, tap the **Calendar** (📅) button next to each field. If you leave the date range empty, the rule will not expire.

3. Complete the **cart price rule** as needed.

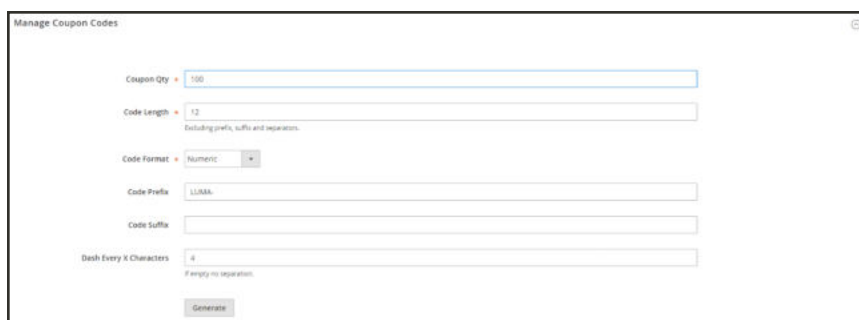
### Method 2: Generate a Batch of Coupons

1. Follow the instructions to create a **cart price rule**.
2. Under **Coupon Code**, mark the **Use Auto Generation** checkbox.
3. To limit the number of times each customer can use the coupon, enter the number of **Uses per Customer**.



*Generate Auto-numbered Coupons*

4. Scroll down and expand the **Manage Coupon Codes** section. Then, do the following:



- a. In the **Coupons Qty** field, enter the number of coupons that you want to generate.
- b. Enter the **Code Length**, not including the prefix, suffix, or separators.
- c. Set the **Code Format** to one of the following:
  - Alphanumeric
  - Alphabetical
  - Numeric
- d. (Optional) Enter a **Code Prefix** to be added to the beginning of the code.
- e. (Optional) Enter a **Code Suffix** to be added to the end of the code.
- f. (Optional) In the **Dash Every X Characters** field, enter the number of characters between each dash. For example, if the code is twelve characters long, and there is a dash every four characters, it will look like this: xxxx-xxxx-xxxx. Dashes make codes easier to read and enter.

5. When complete, tap **Generate**. The list of generated codes appears below.

Coupon Code	Created	Used	Times Used
LSMA-9879-8054-3252	Sep 15, 2016, 7:10:41 PM	No	0
LSMA-0442-8030-7002	Sep 15, 2016, 7:10:41 PM	No	0
LSMA-4245-4854-4853	Sep 15, 2016, 7:10:41 PM	No	0
LSMA-4554-4030-9040	Sep 15, 2016, 7:10:41 PM	No	0
LSMA-3858-1230-2204	Sep 15, 2016, 7:10:41 PM	No	0
LSMA-9020-4858-8020	Sep 15, 2016, 7:10:41 PM	No	0

*Generated Codes*

## Configuring Coupon Codes

The length and format of automatically generated coupon codes is controlled by the configuration. The characters can be set to all numbers, all letters, or a combination. You can insert a dash at set intervals to make it easy to read, and add a .prefix and suffix to associate the code with a specific campaign or initiative.

**Auto Generated Specific Coupon Codes**

Code Length   Use system value  
Excluding prefix, suffix and separators.

Code Format   Use system value

Code Prefix

Code Suffix

Dash Every X Characters   
If empty no separation.

*Auto Generated Specific Coupon Codes*

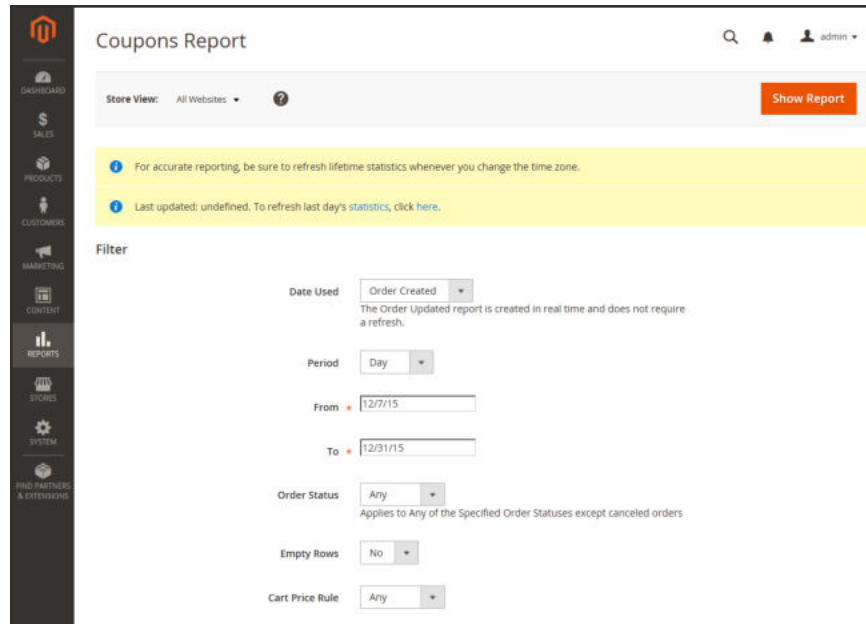
### To format coupon codes:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Promotions**.
3. In the **Auto Generated Specific Coupon Codes** section, do the following:
  - a. Enter the **Code Length**, including prefix, suffix, and separators.
  - b. Set the **Code Format** to one of the following:
    - Alphanumeric
    - Alphabetical
    - Numeric

- c. To add a **Code Prefix**, enter the value that you want to appear at the beginning of all coupon codes.
  - d. To add a **Code Suffix**, enter the value that you want to appear at the end of all coupon codes.
  - e. To insert a **Dash Every X Characters**, enter the number of characters between each dash. Coupon codes with different dash patterns are considered to be different codes, even if the numbers are the same.
4. When complete, tap **Save Config**.

# Coupons Report

The Coupons Report can be filtered for a specific store view, time period, order status, and price rule.



*Coupon Report Filters*

### To run the report:

1. On the Admin sidebar, tap **Reports**. Then under **Sales** choose **Coupons**.
2. If you have multiple store views, set **Store View** in the upper-left corner to establish the scope of the report.
3. To refresh the sales **statistics** for the day, click the message at the top of the workspace.
4. To filter the data, do the following:
  - a. Set **Date Used** to one of the following:
    - Order Created
    - Order Updated

The Order Updated report is created in real-time, and does not require a refresh.
  - b. To define the period of time covered by the report, set **Period** to one of the following:
    - Day
    - Month
    - Year
  - c. Enter the **From** and **To** dates in M/D/YY format to define the date range of the report.
  - d. To print a report for a specific **order status**, set **Order Status** to “Specified,” Then, choose the order status from the list.
  - e. Set omit rows without data from the report, set **Empty Rows** to “No.”
  - f. Do one of the following:
    - To include all coupon activity from all price rules, set **Cart Price Rule** to “Any.”
    - To include only activity that is related to a specific price rule, set **Cart Price Rule** to “Specified,” Then, select the specific cart price rule in the list.
5. When ready to run the report, tap **Show Report**. The report appears at the bottom of the page.

## Free Shipping Promotion

Free shipping can be offered as a promotion, either with, or without a **coupon**. A free shipping coupon, or voucher, can also be applied to customer pick-up orders, so the order can be invoiced and “shipped” to complete the **workflow**.

Some shipping carrier configurations give you the ability of offer free shipping based on a minimum order. To expand upon this basic capability, you can use shopping cart price rules to create complex conditions based on multiple product attributes, cart contents, and customer groups.

### Process Overview:

Step 1: **Enable Free Shipping**

Step 2: **Create a Cart Price Rule**

Step 3: **Complete the Labels**

Step 4: **Save and Test the Rule**

### Step 1: Enable Free Shipping

1. Enable **Free Shipping** in your store’s configuration.
2. Complete the free shipping settings for any **carrier service** that you want to use for free shipping.



## Step 2: Create a Cart Price Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Follow the steps below to set up the type of free shipping promotion that you want to offer.



### Example 1: Free Shipping for Any Order

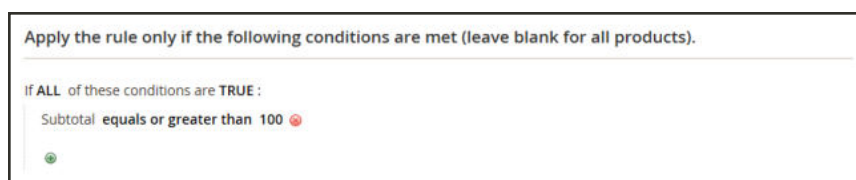
1. Complete the **Rule Information** as follows:
  - a. Enter a **Rule Name** for internal reference.
  - b. Enter a brief **Description** to describe the rule.
  - c. Set **Active** to “Yes.”
  - d. In the **Websites** box, select each site where the free shipping coupon is to be available.
  - e. Select the **Customer Groups** to which the rule applies.
  - f. Set **Coupon** to one of the following:
    - To offer a free shipping promotion without a coupon, accept the default, “No Coupon” setting.
    - To use a coupon with the price rule, select “Specific Coupon.” If necessary, complete the instructions to set up a **coupon**.
2. Scroll down and expand ☺ the **Actions** section. Then, do the following:
  - a. Set **Apply** to “Percent of product price discount.”
  - b. Set **Apply to Shipping Amount** to “Yes.”
  - c. Set **Free Shipping** to “For shipment with matching items.”

The screenshot shows the 'Actions' configuration section for a Price Rule. The 'Apply' dropdown is set to 'Percent of product price discount'. The 'Discount Amount' is set to 0. The 'Maximum Qty Discount is Applied To' is set to 0. The 'Discount Qty Step (Buy X)' is set to 0. The 'Apply to Shipping Amount' toggle is turned on (Yes), with a note that the discount amount is applied to subtotal and shipping amount separately. The 'Discard subsequent rules' toggle is turned off (No). The 'Free Shipping' dropdown is set to 'For shipment with matching items'.

*Price Rule Action*

## Example 2: Free Shipping for Orders Over \$Amount

1. Complete the **General Information** settings as described in the previous example.
2. Scroll down and expand  the **Conditions** section.
3. Tap **Add** () to insert a condition. Then, do the following:
  - a. In the list under **Cart Attribute**, choose **Subtotal**.
  - b. Click the **is** link, and choose “equals or greater than.”
  - c. Click the (...) “more” link, and enter a threshold value for the Subtotal, such as 100, to complete the condition.




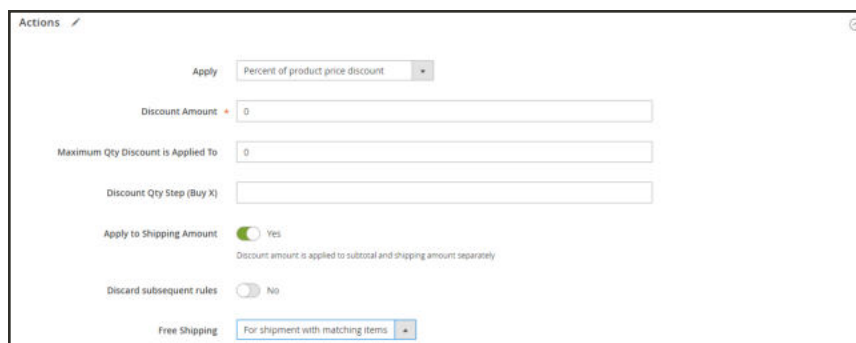
Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE:

Subtotal equals or greater than 100

### Condition

4. If necessary, expand  the **Actions** section. Then do the following:
  - a. Set **Apply** to “Percent of product price discount.”
  - b. Set **Apply to Shipping Amount** to “Yes.”
  - c. Set **Free Shipping** to “For shipment with matching items.”



Actions

Apply: Percent of product price discount

Discount Amount: 0

Maximum Qty Discount is Applied To: 0

Discount Qty Step (Buy X):

Apply to Shipping Amount:  Yes  
Discount amount is applied to subtotal and shipping amount separately

Discard subsequent rules:  No

Free Shipping: For shipment with matching items

### Actions

**Step 3: Complete the Labels**

Complete **Step 4** of the cart price rule instructions to enter any labels that appear during checkout.

**Step 4: Save and Test the Rule**

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.

## Buy X Get Y Free

This example shows how to set up a **cart price rule** for a “Buy X, Get Y Free” promotion. The format of the discount is as follows:

Buy X quantity of product, get Y quantity for free.

### Process Overview:

Step 1: **Create a Cart Price Rule**

Step 2: **Define the Conditions**

Step 3: **Define the Actions**

Step 4: **Complete the Label**

Step 5: **Save and Test the Rule**

### Step 1: Create a Cart Price Rule


Complete **Step 1** of the cart price rule instructions to complete the rule information.

### Step 2: Define the Conditions

Complete **Step 2** of the cart instructions to define the conditions for the price rule. This is the first of two conditions that can be added to the rule, and determines when the rule is triggered. It can be based upon a combination of product attributes, products, and cart attributes. If left blank, the rule is triggered for every cart.

*Condition*

### Step 3: Define the Actions

1. Expand  the **Actions** section, and do the following:
  - a. Set **Apply** to “Buy X get Y free (discount amount is Y).”
  - b. Set **Discount Amount** to 1. This is the quantity the customer will receive for free.
  - c. To limit the number of discounts that can be applied when the condition is met, enter the number in the **Maximum Qty Discount is Applied To** field. For example, enter “1” to discount only one item.

- d. In the **Discount Qty Step (Buy X)** field, enter the quantity that the customer must purchase to qualify for the discount. In this example, the customer must purchase three.
- e. If you want to prevent other discounts from being applied to the purchase, set **Discard subsequent rules** to "Yes."

*Buy 3 Get 1 Free*

- 2. To apply the rule only to specific items in the cart, complete the condition to describe the cart item(s) and/or product attribute(s) that are required for the promotion. The following example uses the SKU to apply the rule to all associated variations of a configurable product.

*Condition for Cart Items*

- 3. To include **Free Shipping**, choose one of the following options:
  - For matching items only
  - For shipment with matching items
- 4. Tap **Save and Continue Edit**. Then, complete the rest of the rule as needed.

**Step 4: Complete the Label**

Complete **Step 4** of the cart price rule instructions to enter the label that appears during checkout.

**Step 5: Save and Test the Rule**

- 1. When complete, tap **Save Rule**.
- 2. Test the rule to make sure that it works correctly.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.

## Examples

Buy X Get Y Free is processed as a single action, with a “row total” dependency. All items must be from the same SKU to qualify for the promotion. For example:

```
Buy X quantity of product from category A, get Y quantity of the same product for free.
```

To limit the free product to categories A, B, and C, set the action as follows:

```
If ALL of these conditions are TRUE:  
Category is one of A, B, C
```

To limit the free items from any category A, B, C and receive Y from SKUs D123, E123, F123, set the action as follows:

```
If ALL of these conditions are TRUE:  
SKU is one of D123, E123, F123
```

Use the following formula to determine the correct value for the Maximum Qty Discount:

```
Formula = (X+Y) * (M/Y)  
Where  
X = number of items purchased  
Y = number of free items  
M = Maximum number of free items allowed
```

For example:

```
Buy 5 Get 2 Free with maximum of 4 free items allowed.  
Where  
X = 5  
Y = 2  
M = 4  
Maximum Qty Discount = (5+2)*(4/2)=(7)*(2)=14
```

Buy 5 Get 3 Free with maximum of 9 free items allowed.

Where

X = 5

Y = 3

M = 9

Maximum Qty Discount =  $(5+3)*(9/3)=24$

Buy 20 Get 2 Free with maximum of 20 free items allowed.

Where

X = 20

Y = 2

M = 20

Maximum Qty Discount =  $(20+2)*(20/2)=(22)*(10)=220$

## Discount with Minimum Purchase

Cart price rules can be used to offer a percentage discount based on a minimum purchase. In the following example, a 25% discount is applied to all purchases over \$200.00 in a specific category. The format of the discount is as follows:

X% off all Y (category) over \$Z dollars

### Process Overview:

- Step 1: [Create a Shopping Cart Rule](#)
- Step 2: [Define the Conditions](#)
- Step 3: [Define the Actions](#)
- Step 4: [Apply the Labels](#)
- Step 5: [Save and Test the Rule](#)

### Step 1: Create a Shopping Cart Rule

Follow the basic [instructions](#) to create a cart rule.

### Step 2: Define the Conditions

1. Scroll down and expand ☺ the **Conditions** section.
2. Tap **Add** (+), and choose **Product Attribute Combination**.



*Product Attribute Combination*

3. Tap **Add** (+) at the beginning of the next line. Then in the list under **Product Attribute**, choose **Category**.





Category

- a. Click the (...) “more” link to display additional options.



Category IS

- b. Tap the **Chooser** (☰) button to see the available categories. In the category tree, mark the checkbox of each category that you want to include. Then, press **Enter** to add the categories to the condition.



Category IS

- 4. Tap **Add** (+) at the beginning of the next line, and do the following:

- a. In the list under **Cart Item Attribute**, choose **Price in cart**.



Category IS

- a. Click the **is** link, and choose “equals or greater than.”
- b. Click the (...) “more” link and enter the amount that the Price in Cart must be to meet the condition. For example, enter 200.

*Enter the Price to Complete the Condition*

5. Tap **Save and Continue Edit**.

### Step 3: Define the Actions

1. Expand  the **Actions** section, and do the following:

*Actions*

- a. Set **Apply** to “Percent of product price discount.”
  - b. Enter the **Discount Amount**. For example, enter 25 for a twenty-five percent discount.
  - c. To prevent additional promotions from being applied to the purchase, set **Discard subsequent rules** to “Yes.”
2. Tap **Save and Continue Edit**. Then, complete the rule as needed.

**Step 4: Complete the Labels**

Complete **Step 4** of the cart price rule instructions to enter any labels that appear during checkout.

**Step 5: Save and Test the Rule**

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.

# Communications

## Contents

In this section of the guide, you will learn how to customize email and newsletter templates, as well as PDF invoices and packing slips. You will also learn how to personalize the content with variables and markup tags.

### Email

- Supported Email Clients
- Preparing Your Email Logo
- Configuring Email Templates
  - Sales Email
  - Payment Failed Email
  - Admin Email
- Customizing Email Templates
  - Header Template
  - Footer Template
  - Message Templates
- Configuring Email Communications

### Sales Documents

- Configuring Sales Emails
- PDF Logo Requirements
- Adding Reference IDs to Header

### Newsletters

- Configuring Newsletters
- Newsletter Templates
- Sending Newsletters
- Managing Subscribers

### RSS Feeds

### Using Variables

- Adding Predefined Variables
- Creating Custom Variables
- Markup Tags
- Variable Reference



## CHAPTER 24:

# Email

Email templates define the layout, content, and formatting of automated messages sent from your store. They are called **transactional emails**<sup>1</sup> because each one is associated with a specific type of transaction, or event.

Magento includes a set of responsive email templates that are triggered by a variety of events that take place during the operation of your store. Each template is optimized for any screen size, and can be viewed from the desktop, as well as on tablets and mobile devices. You will find a variety of prepared email templates related to customer activities, sales, product alerts, admin actions, and system messages that you can customize to reflect your brand.

---

<sup>1</sup>An automated email message that is sent in response to a specific event or transaction.

## Supported Email Clients

A wide range of technologies is supported by the various email clients and services available today. Although there is some variation in the way email messages are rendered, we have found the following services to be compatible with Magento Open Source.

### Desktop Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
OS X 10.8	Apple Mail 6
OS X 10.7	Outlook 2011 Outlook 2013
Windows 8	Outlook 2010
Windows 7	Outlook 2007 Outlook 2003

### Mobile Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
Android 4.2, “Jelly Bean”	Native email app
Android 2.3, “Gingerbread”	Native email app
Gmail App (Android 4.2)	Native email app
Blackberry 5 OS	Native email app
IOS 8	iPhone 6 iPhone 6 Plus
IOS 7	iPad (Retina) iPad Mini iPhone 5s
<b>Mail on these devices:</b>	
IOS 6	iPhone 5 iPhone 4s

**Web Clients**

EMAIL APPLICATION	BROWSERS SUPPORTED*
AOL Mail	Chrome Internet Explorer Firefox
Gmail	Chrome Internet Explorer Firefox
Yahoo! Mail	Chrome Internet Explorer Firefox
Outlook.com	Chrome Internet Explorer

\* The latest version of each browser was used for testing.



## Preparing Your Email Logo

Logos can be saved as any of the following file types. Logos with transparent backgrounds can be saved as either .GIF or .PNG files.

- JPG/JPEG
- GIF
- PNG

To ensure that your logo renders well on high-resolution devices, the uploaded image should be three times the size of the dimensions that are specified in the header template. Typically, original logo artwork is created as a vector image, so it can be scaled up without losing resolution. The image can then be saved in one of the supported bitmap image formats.



*Logo Three Times Display Size*

To take advantage of the limited vertical space in the header, make sure to crop the image to eliminate any wasted space at the top or bottom. When editing the image, be careful to preserve the **aspect ratio**<sup>1</sup> of the logo, so the height and width resize proportionally.

As a general rule, you can make an image smaller than the original, but not larger without losing resolution. Taking a small image and scaling it up in a photo editor lowers the resolution of the image. For example, if the display dimensions of the logo are 168 pixels wide by 48 pixels high in the header template, the uploaded image should be 504 pixels wide by 144 pixels high.

LOGO DIMENSIONS	1 X (DISPLAY SIZE)	3 X (IMAGE SIZE)
Width:	168 px	504 px
Height:	48 px	144 px

<sup>1</sup>The proportional relationship between the width and height of an image.

## Configuring Email Templates

The configuration determines the logo, as well as the header and footer templates that are used for all transactional email messages that are sent from your store.


### *Transactional Emails*

#### Process Overview:

Step 1: **Upload Your Logo**

Step 2: **Select the Header and Footer Templates**

#### Step 1: Upload Your Logo

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Transactional Emails** section. Then, do the following:
  - a. To upload your prepared **Logo Image**, tap **Upload**. Find the file on your computer, and select the file.
  - b. In the **Logo Image Alt** field, enter alternate text to identify the image.
  - c. Enter the **Logo Width** and **Logo Height** in pixels. Enter each value as a number, without the “px” abbreviation. These values refer to the display dimensions of the logo in the header, and not to the actual size of the image.

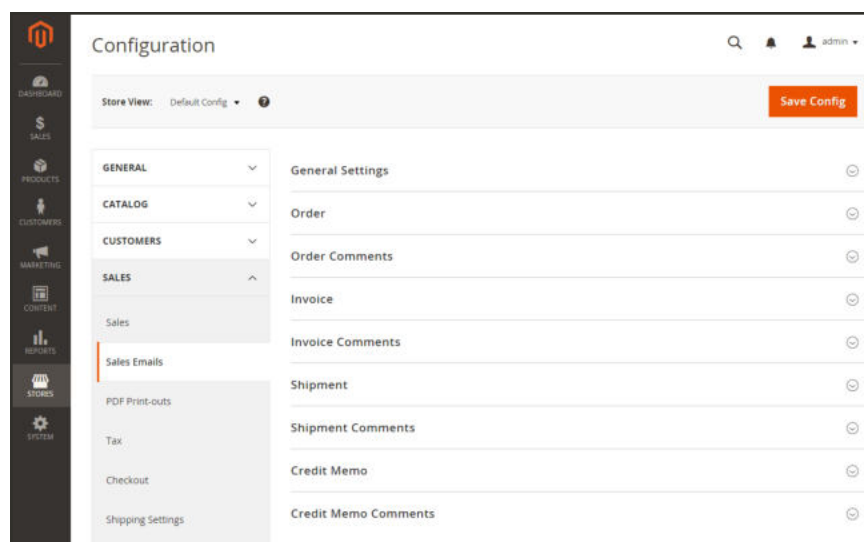
## Step 2: Choose the Header and Footer Templates

If you have custom header and footer templates for your store, or for different stores, you can specify which templates are used for each, according to the **scope** of the configuration.

1. Choose the **Header Template** to be used for all transactional email messages.
2. Choose the **Footer Template** to be used for all transactional email messages.
3. When complete, tap **Save Config**.

## Sales Email

A number of email messages are triggered by the events related to an order, and the configuration is similar. You must identify the store contact that appears as the sender of the message, the email template to be used, and anyone else who is to receive a copy of the message. Sales emails can be sent when triggered by an event, or by predetermined interval.




*Sales Emails*

## Step 1: Update the Email Templates

Make sure that you have updated each **email template** to reflect your brand. For a complete list of templates, see: Email Template List.

## Step 2: Choose the Type of Transmission

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales Emails**.

3. Expand  the **General Settings** section. Then, set **Asynchronous Sending** to one of the following:

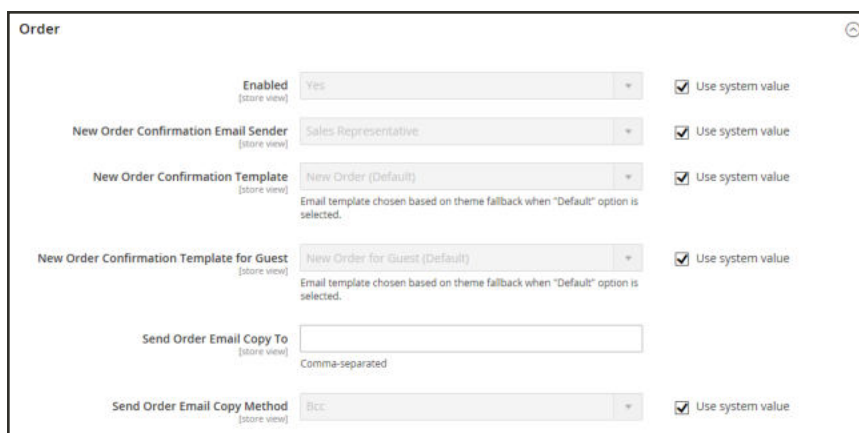
- Disable                      Sends sales email when triggered by an event.
- Enable                        Sends sales email at predetermined, regular intervals.



*General Settings*

### Step 3: Complete the Details for Each Sales Email Message

4. Expand  the **Order** section. Then, do the following:

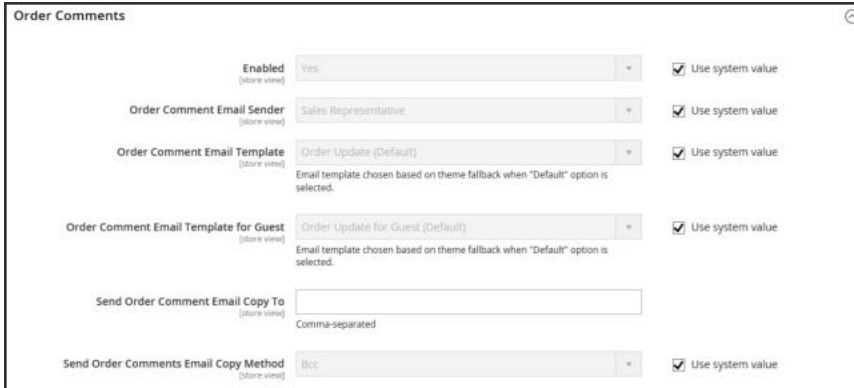


*Order*

- a. Verify that **Enabled** is set to “Yes.”
- b. Set **New Order Confirmation Email** to the store contact that appears as the sender of the message.
- c. Set **New Order Confirmation Template** to the template that is used for the email that is sent to registered customers.
- d. Set **New Order Confirmation Template for Guest** to the template that is used for the email that is sent to guests who do not have an account with your store.
- e. In the **Send Order Email Copy To** field, enter the email address of anyone who is to receive a copy of the new order email. If sending a copy to multiple recipients, separate each address with a comma.
- f. Set **Send Order Email Copy Method** to one of the following:

Bcc	Sends a “blind courtesy copy” by including the recipient in the header of the same email that is sent to the customer. The BCC recipient is not visible to the customer.
Separate Email	Sends the copy as a separate email.

5. Expand  the **Order Comments** section, and repeat these steps.



**Order Comments**

Enabled   Use system value

Order Comment Email Sender   Use system value

Order Comment Email Template   Use system value  
Email template chosen based on theme fallback when "Default" option is selected.

Order Comment Email Template for Guest   Use system value  
Email template chosen based on theme fallback when "Default" option is selected.

Send Order Comment Email Copy To  Comma-separated

Send Order Comments Email Copy Method   Use system value

### *Order Comments*

6. Complete the configuration for the remaining sales emails:

- Invoice
- Shipment
- Credit Memo

7. When complete, tap **Save Config.**

## Payment Failed Email

A notification is sent to the customer if the payment method that is chosen during checkout fails to complete the transaction.

The screenshot shows the 'Payment Failed Emails' configuration panel. It contains the following fields and options:

- Payment Failed Email Sender:** Dropdown menu set to 'General Contact' with a 'Use system value' checkbox checked.
- Payment Failed Email Receiver:** Dropdown menu set to 'General Contact' with a 'Use system value' checkbox checked.
- Payment Failed Template:** Dropdown menu set to 'Payment Failed (Default)' with a 'Use system value' checkbox checked. Below the dropdown, it says: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Send Payment Failed Email Copy To:** A text input field with the placeholder text 'Separate by ","'.
- Send Payment Failed Email Copy Method:** Dropdown menu set to 'Bcc'.

### *Payment Failed Emails*

#### Step 1: Update the Email Templates

Make sure that you have updated each **email template** to reflect your brand. For a complete list of templates, see: Email Template List.

#### Step 2: Configure the Payment Failed Emails

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☺ the **Payment Failed Emails** section. Then, do the following:
  - a. Set **Payment Failed Email Sender** to the store contact that appears as the sender of the message.
  - b. Set **Payment Failed Email Receiver** to the store contact that is to receive notification of failed email transmissions.
  - c. Set **Payment Failed Template** to the template that is used for the email that is sent when the payment method fails during checkout.
  - d. In the **Send Payment Failed Email Copy To** field, enter the email address of anyone who is to receive a copy of the payment failed notification. If sending a copy to multiple recipients, separate each address with a comma.

- e. Send **Payment Failed Copy Method** to one of the following:

**Bcc** Sends a “blind courtesy copy” by including the recipient in the header of the same email that is sent to the customer. The BCC recipient is not visible to the customer.

**Separate Email** Sends the copy as a separate email.

4. When complete, tap **Save Config.**

## Admin User Email


The Admin email template configuration determines the email templates that are sent when users forget and reset their passwords, the store contact that appears as the sender of the message, and how long the password recovery link remains valid.

The screenshot shows the 'Admin User Emails' configuration interface. It contains three rows of settings:

- Forgot Password Email Template** (Global): Set to 'Forgot Admin Password (Default)'. A note below reads: 'Email template chosen based on theme fallback when "Default" option is selected.' The 'Use system value' checkbox is checked.
- Forgot and Reset Email Sender** (Global): Set to 'General Contact'. The 'Use system value' checkbox is checked.
- User Notification Template** (Global): Set to 'User Notification (Default)'. A note below reads: 'Email template chosen based on theme fallback when "Default" option is selected.' The 'Use system value' checkbox is checked.

### *Admin User Emails*

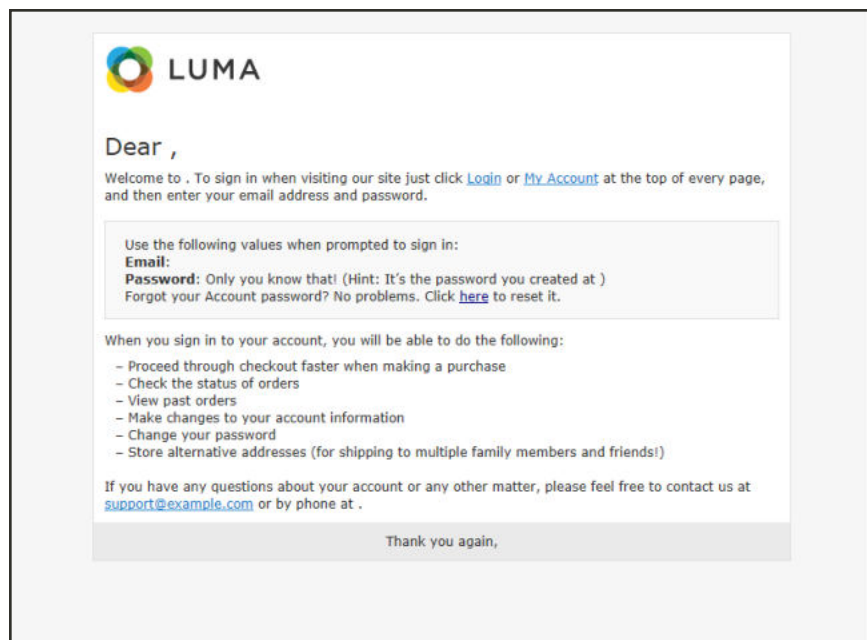
### To configure the Admin email templates:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand  the **Admin User Emails** section. Then, do the following:
  - a. Set **Forgot Password Email Template** to the template that is sent when Admin users forget their passwords.
  - b. Set **Forgot and Reset Email Sender** to the store contact that appears as the sender of the message.
  - c. Set **User Notification Template** to the email template that is used as the default for admin notifications.
4. When complete, tap **Save Config.**

## Customizing Email Templates

Magento includes a default email template for the body section of each message that is sent by the system. The template for the body content is combined with the header and footer templates to create the complete message. The content is formatted with HTML and CSS, and can be easily edited, and customized by adding **variables** and **frontend apps**. Email templates can be customized for each website, store, or store view. Make sure to update the system configuration after creating a customized template, so the custom template is used instead of the default.

The default templates include your logo and store information, and can be used without further customization. However as a best practice, you should view each template, and make any necessary changes before they are sent to customers.

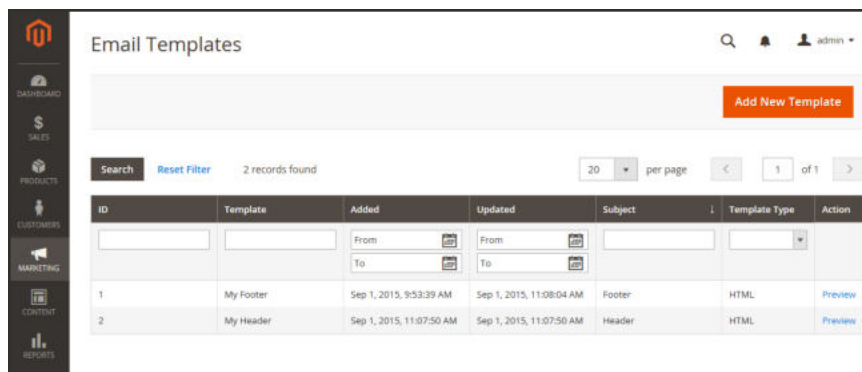


*Preview of Welcome Template*



## Header Template

The email header template includes your logo that is linked to your store. In addition, you can easily insert variables to add store contact information to the header.



*Email Templates*

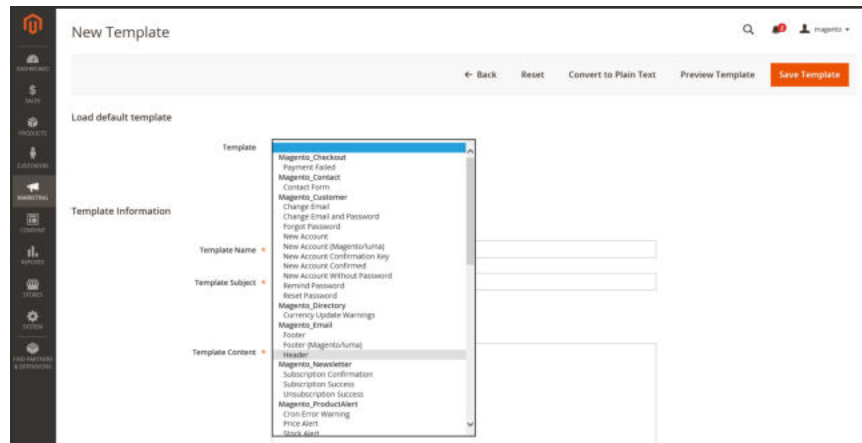
### Process Overview:

- Step 1: [Load the Template](#)
- Step 2: [Customize and Preview the Template](#)
- Step 3: [Update the Configuration](#)

### Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:

- a. Under **Load default template**, in the **Template** list under **Magento\_Email**, choose “Header.”



*Default Header Template*

- b. Tap **Load Template**.

The HTML code and variables from the template appear in the form.

## Step 2: Customize the Template

1. Under **Template Information**, do the following:
  - a. Enter the **Template Name** for your custom header.
  - b. Enter a **Template Subject** to help organize the templates. In the grid, the list of templates can be sorted and filtered by the Subject column.



*Header Template Information*

- c. In the **Template Content** box, modify the HTML as needed.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

- d. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.



*Insert Variable*

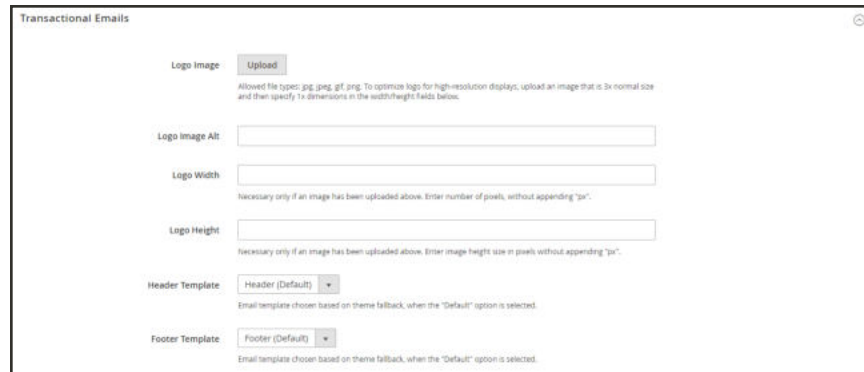
Although the Store Contact variables are the ones most often included in the header, you can enter the code for any system or **custom variable** directly into the template.

- e. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
2. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
3. When complete, tap **Save Template**.

Your custom header now appears in the list of available Email templates.

### Step 3: Update the Configuration

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Scroll down and expand ☺ the **Transactional Emails** section.
4. Choose the **Header Template** that is used as the default for email notifications.
5. When complete, tap **Save Config**.



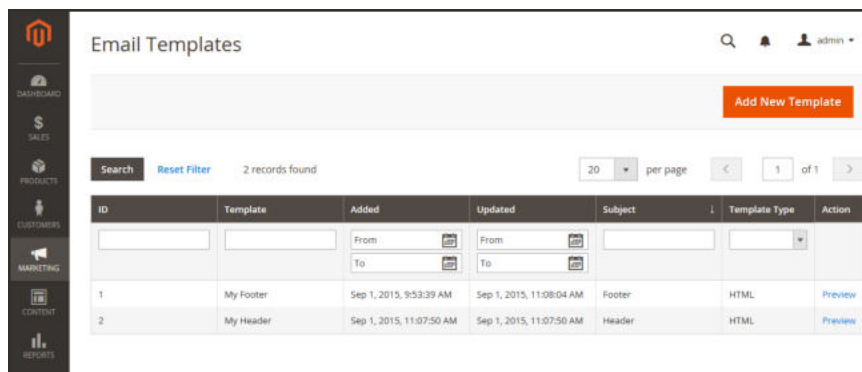
*Transactional Emails*

**Field Descriptions**

FIELD	DESCRIPTION
<b>LOAD DEFAULT TEMPLATE</b>	
Template	Lists the selection of available templates, and identifies the template to be customized.
<b>TEMPLATE INFORMATION</b>	
Template Name	The name of your custom template.
<input type="button" value="Insert Variable"/>	Inserts a Store Contact Information variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template header can be entered in the Template Styles box.

## Footer Template

The email template footer contains the closing and signature line of the email message. You can change the closing to fit your style, and add additional information, such as the company name and address below your name.



*Email Templates*

### Process Overview:

- Step 1: [Load the Default Template](#)
- Step 2: [Customize and Preview the Template](#)
- Step 3: [Update the Configuration](#)

### Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
  - a. Under **Load default template**, in the **Template** list under **Magento\_Email**, choose “Footer.”
  - b. Tap **Load Template**.



*Default Footer Template*

## Step 2: Customize and Preview the Template

1. Enter the **Template Name** for your custom footer.
2. Enter a **Template Subject** to help organize the templates. In the grid, the templates can be sorted and filtered by the Subject column.

Template information

Template Name \*

Template Subject \* {{trans "Footer"}}

Insert Variable...

Template Content \*

```

<!-- End Content -->
</td>
</tr>
</table>
<td class="footer">
<p class="closing">{{trans "Thank you, %store_name"
store_name=$store.getFrontendName()}}</p>
</td>
</tr>
</table>
</td>
</tr>
</table>
<!-- End wrapper table -->
</body>

```

Template Styles

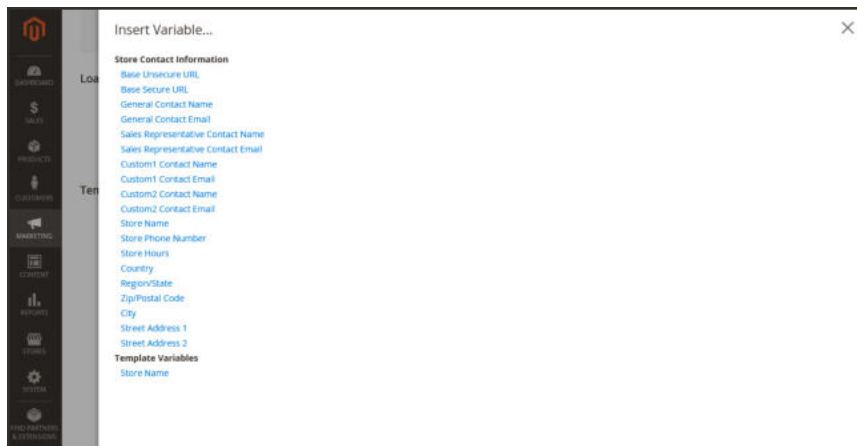
*Footer Template Information*

3. In the **Template Content** box, modify the HTML as needed.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

4. To insert a **variable**, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.




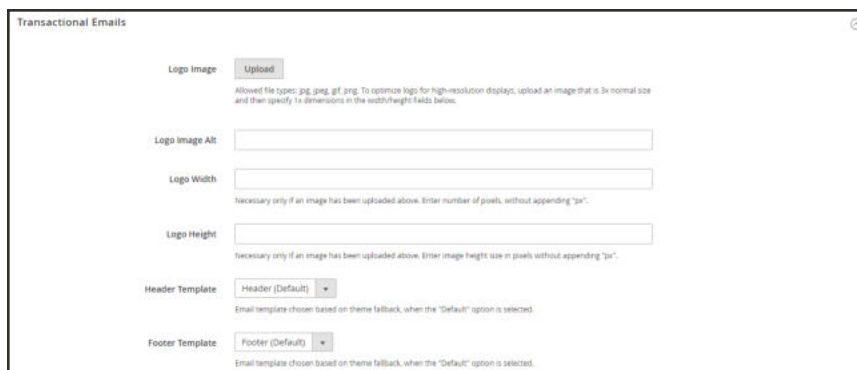
*Insert Variable*

Although the Store Contact variables are the ones most often included in the footer, you can enter the code for any system or **custom variable** directly into the template.

5. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.

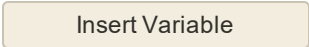
### Step 3: Update the Configuration

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Scroll down and expand  the **Transactional Emails** section.
4. Choose the **Footer Template** that is used as the default for email notifications.
5. When complete, tap **Save Config**.



*Transactional Emails*

## Field Descriptions

FIELD	DESCRIPTION
<b>LOAD DEFAULT TEMPLATE</b>	
Template	Lists the selection of available templates, and identifies the template to be customized.
<b>TEMPLATE INFORMATION</b>	
Template Name	The name of your custom template.
	Inserts a Store Contact Information variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template footer can be entered in the Template Styles box.



## Message Templates

The process of customizing the body of each message is the same as the customizing the header or footer. The only difference is that there is a different message template for each activity or event that triggers a notification. You can use the templates as they are, or customize them to match your voice and brand. In addition to the template text, there's a wide selection of **variables** that can be incorporated into the template.

### Process Overview:

Step 1: **Load the Default Template**

Step 2: **Customize the Template**

Step 4: **Update the Configuration**

Step 5: **Preview and Save**

### Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
  - a. Under **Load default template**, in the **Template** list, choose the template that you want to customize.
  - b. Tap **Load Template**.



*Default Message Template*

### Step 2: Customize the Template

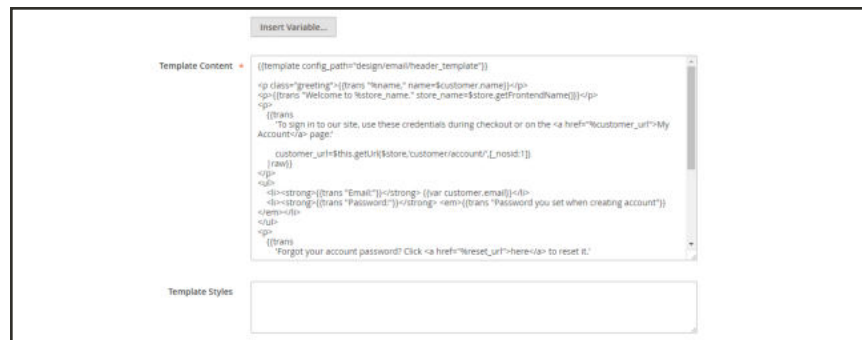
1. In the **Template Name** field, enter a name for your custom template.
2. By default, the **Template Subject** contains the first line of the message, which is the salutation. You can leave it as is, or enter something more descriptive.
3. Take note of the **Currently Used For** path to the template configuration. You will later follow this path to update the configuration.



Message Template Information

4. In the **Template Content** box, modify the HTML as needed. The content consists of a combination of HTML tags, CSS directives, variables, and text.

When working in the template code, be careful not to accidentally type over the code that is enclosed in double braces.



Template Message Content

5. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.



Insert Variable

In addition to the Store Contact variables, the list includes the Customer Account URL, Customer Email, and Customer Name. However, you are not limited to the variables in this list. You can enter the code for any system or **custom variable** directly into the template.

6. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.

### Step 3: Update the Configuration

1. In the breadcrumb trail at the top of the Template Information section, find the following information, as it relates to your template. In this example the template configuration is located on the Customer Configuration page, in the Create New Account Options section, and in the Default Welcome Email field.

Page Customer Configuration  
 Section Create New Account Options  
 Field Default Welcome Email

2. Tap the link to open the template configuration page.



3. Expand  the section. Then, find the field for the email template that you customized, and specify the new template as the default.



*Welcome Email Configuration*

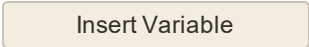
### Step 4: Preview and Save the Template

1. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
2. When complete, tap **Save Template**.

Your custom template is now available in the list of Email templates.



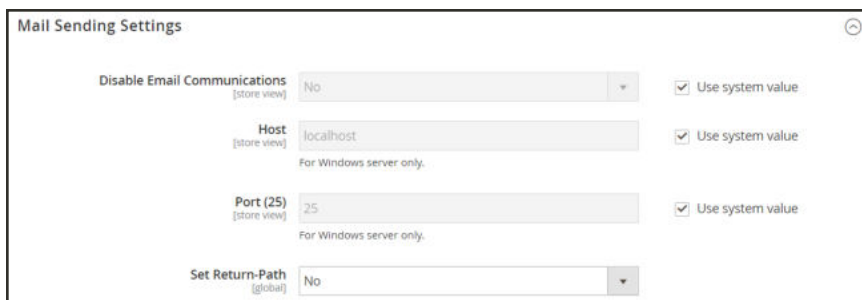
### Field Descriptions

FIELD	DESCRIPTION
<b>LOAD DEFAULT TEMPLATE</b>	
Template	Lists the selection of available templates, and identifies the template to be customized.
<b>TEMPLATE INFORMATION</b>	
Template Name	The name of your custom template.
	Inserts a variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template can be entered in the Template Styles box.

## Configuring Email Communications

The Mail Sending Settings give you the ability to route returned email or replies to email to a specific address. Also, if your store is running on a Windows server, you can verify the host and port settings.

**Security Notice!** We recommend that all merchants immediately set their mail sending configuration to protect against a recently identified potential remote code execution exploit. Until this issue is resolved, we highly recommend that you avoid using **Sendmail** for email communications. In the Mail Sending Settings, make sure that Set Return Path is set to "No." To learn more, see the [Magento Security Center posting](#).



*Mail Sending Settings*

**To configure email communications:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand ☺ the **Mail Sending Settings** section. Then, do the following:
  - a. If necessary, set **Disable Email Communications** to “No.”
  - b. If running on a Windows server, verify the following settings:
 

Host	localhost
Port (25)	25
  - c. Until the current **security issue** is resolved, we highly recommend that you set **Set Return Path** to “No.”
 

No	<b>(Recommended Security Measure)</b> Routes returned email to the default store email address.
Yes	Routes returned email to the default store email address.
Specified	Routes returned email to the email address specified in the <b>Return Path Email</b> field.
4. In the panel on the left under **Sales**, choose **Sales Emails**. Then, do the following:
  - a. Expand the **General Settings** section.
  - b. Set **Asynchronous sending** to “Enable.”



*General Settings*

5. When complete, tap **Save Config**.



## CHAPTER 25:

# Engagement Cloud

Engagement Cloud, powered by [dotdigital](#), gives you the ability to produce professional, personalized communications and reports using data from your Magento store, including:

- Create customized email communications
- Import contacts
- Schedule campaigns
- Create rules to add logic
- Automate your campaigns

## Changes In the Latest Release

### New Features

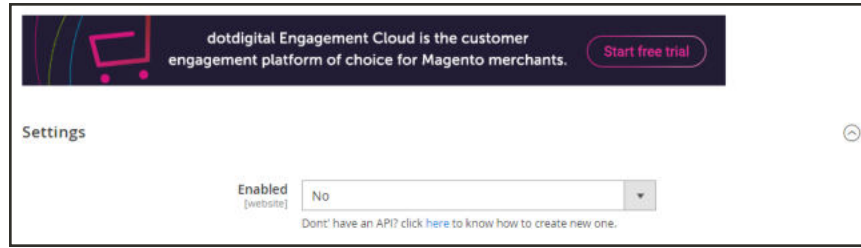
- New branding: In the Marketing Menu, “Marketing Automation” is now “Customer Engagement.” In the Magento configuration, the “dotmailer” section under “General” is now “Engagement Cloud.” The company dotmailer is now “dotdigital.”
- Support for marketing preferences in the Engagement Cloud dashboard.
- If enabled, displays the customer consent text in the customer's account dashboard as general subscription text.
- The abandoned cart and automation process have a retry function if contacts are pending.

## Setting Up Engagement Cloud

To use Engagement Cloud, you must first sign up for a free account. Then, follow the instructions to complete the setup and gain access to your account dashboard.

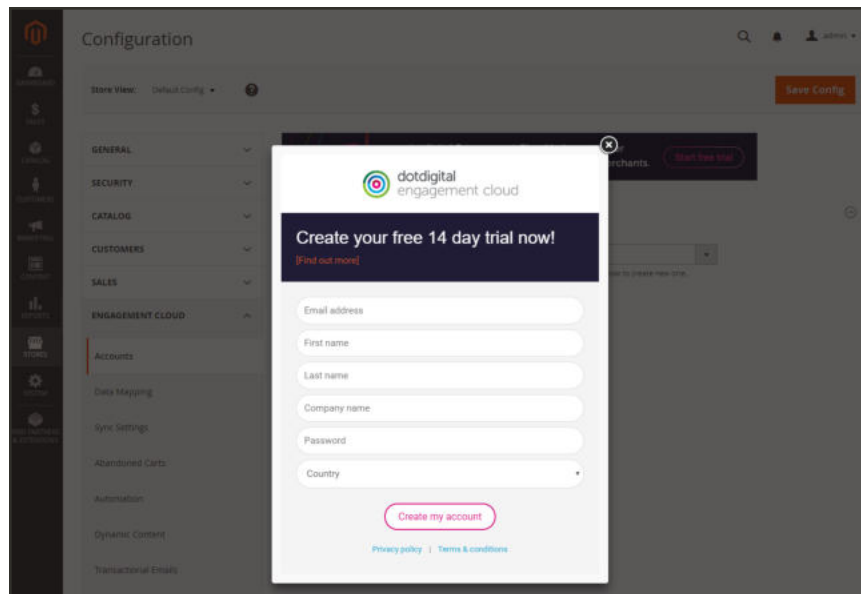
### Step 1: Sign Up for a Free Trial

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Engagement Cloud**, choose **Accounts**.
3. In the banner, tap **Start free trial**.



*Start Free Trial*

4. Complete the form, and click **Create an Account**.

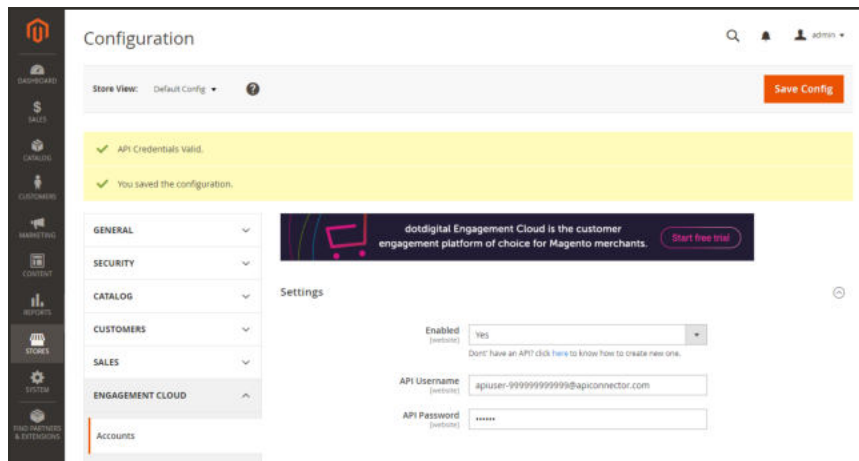


*Create an Account*

5. Wait a few moments while your account is created. Then when the “congratulations” message appears, click Close (✕).

Engagement Cloud is now enabled, and your **API Username** and **API Password** appear in the **Settings** section of the Magento configuration.

6. In the upper-right corner, tap **Save Config**.
7. When prompted, click the **Cache Management** link in the message at the top of the page. Then, refresh any invalid cache.



*Account Credentials*

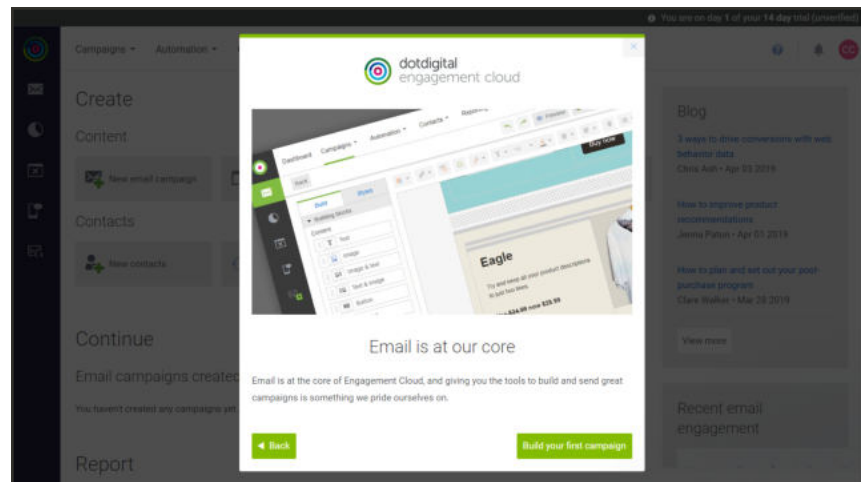
## Step 2: Log in to Your Account

1. In a new browser window, go to the [dotdigital](#) website. In the upper-right corner, click **Login**. Then, do the following:
  - a. Enter your email address and password that you specified when you signed up for the account.
  - b. Check your email for the authorization request message from dotdigital. Then, click the activation link to get started. The activation link is valid for one hour.

If you can't find the message, check your Junk Email folder.
2. During the welcome interview, you are asked to answer a few questions about your business. Complete the interview, and navigate through the introduction. Then, tap **Build your first campaign**. To continue, see: [Create a Campaign](#).

At some point while working with your free trial, you'll be asked to verify your account. When prompted, click the free trial message above the header, and follow the instructions. Until then, the status of your account will be "unverified."





*Build Your First Campaign*

### Step 3: Complete the Magento Configuration

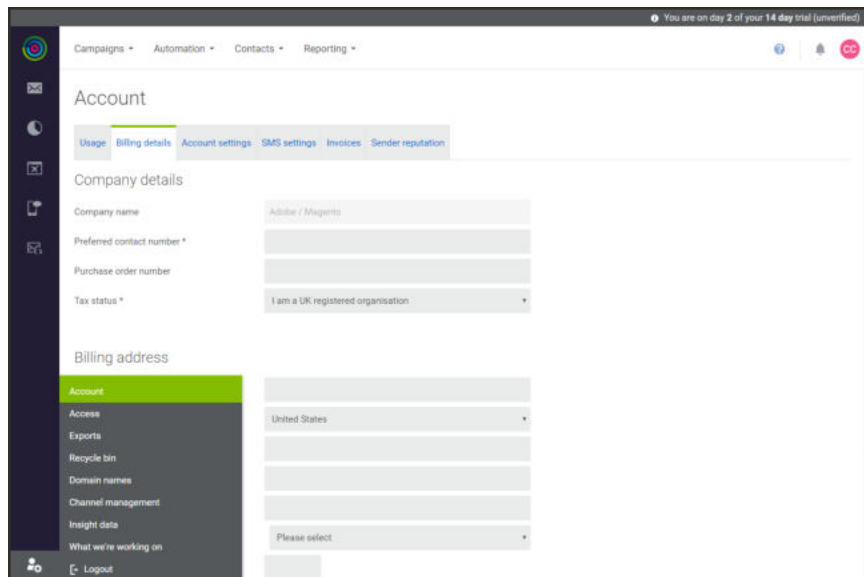
The Engagement Cloud configuration includes numerous settings to sync order, catalog, and abandoned cart data, and to configure additional features. To learn more, see the [Quick Start Configuration Guide for Magento 2](#).

## Account Details

Use the Account option on the Settings menu to update your information and settings, and view your account dashboard.

### To edit your account details:

1. In the lower-left corner, tap the **Settings** icon at the bottom of the sidebar.
2. In the menu, choose **Account**.



Account

3. On the Account page, choose the **Billing details** tab.
  - a. Update the **Company details** as needed.
  - b. Update the **Billing address** as needed.
  - c. To add a **Billing contact**, tap **New billing contact**. Then, enter the email address of the billing contact, and tap **Save**.
4. When complete, tap **Save**.

### Field Descriptions

FIELD	DESCRIPTION
<b>COMPANY DETAILS</b>	
Company name	Your company name.
Preferred contact number	Your preferred business contact telephone number, including area code.
Purchase order number	The purchase order assigned by your company for making payments for your Engagement Cloud account.
Tax status	Options: I am a UK registered organisation I am a EU registered organisation I am an IE registered organisation I am exempt from paying tax

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
	I am an AUS registered organisation
	I am an AUS registered organisation, exempt from paying tax
<b>BILLING ADDRESS</b>	
Email	The email address that is associated with billing.
Country	The country where your company is registered for business.
Building name/number	The building name and number, if applicable.
Street	The street address of your business.
City	The city where your business is located.
State	The state where your business is located.
Zip code	The ZIP code where your business is located.
<b>BILLING CONTACTS</b>	
<b>New billing contact</b>	Allows you to enter the email address of an additional billing contact.


**API Users**

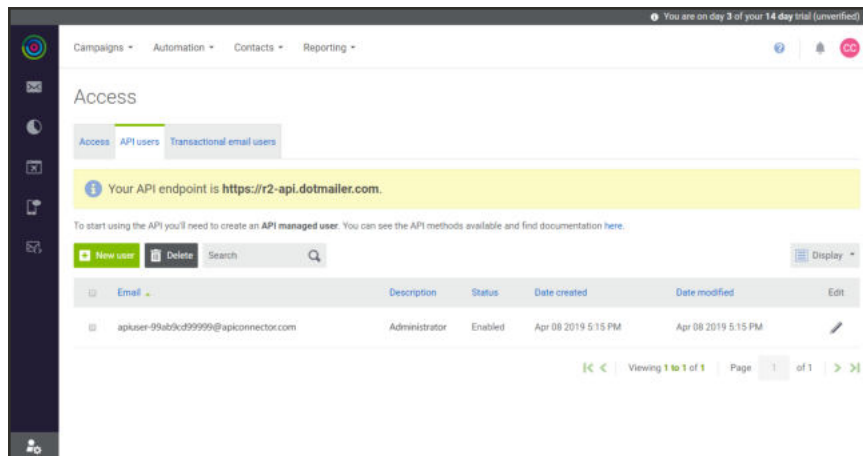
The API allows developers to establish integration with other systems, and automate tasks. The Engagement Cloud API version 2.0 web service supports both REST and SOAP.

As a best practice, it is recommended that you create one API user per supported system. For example, having only one API user for your Magento integration makes it easier to isolate and diagnose problems, and change privileges.

Only the account owner or another user with the “Can manage account” permission can create API users. To learn more, see [Getting started with the API](#).

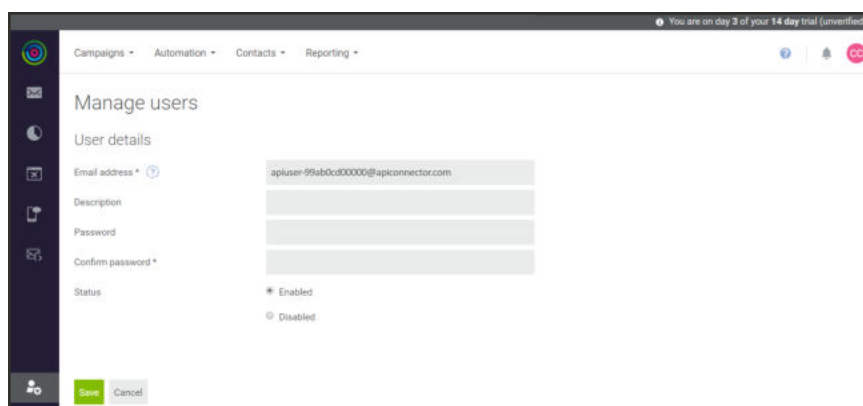
**To add an API user:**

1. Tap the **Settings** (  ) icon at the bottom of the sidebar. Then on the menu, choose **Access**.
2. On the Access page, choose the **API users** tab.



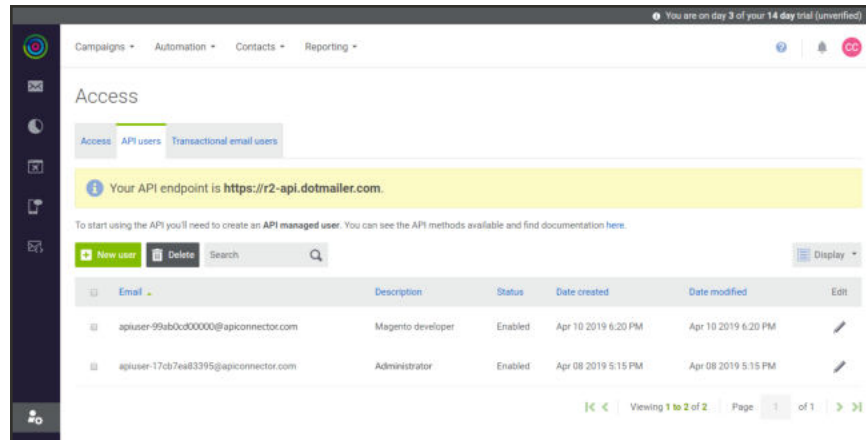
API Users

3. Tap **New user**. Then, do the following:
  - a. Accept the randomly-generated **Email address**. Each API user must have a unique email address.
  - b. In the **Description** field, describe how the account is to be used.  
Because this field appears in the list after the randomly-generated email address, it should make the user easy to identify.
  - c. Click the **password** field, and enter the password for the user. Then, enter the password again to confirm.
  - d. Verify that the **Status** “Enabled” option is selected.
4. When complete, tap **Save**.



Manage Users

The new API user is added to the Access list.



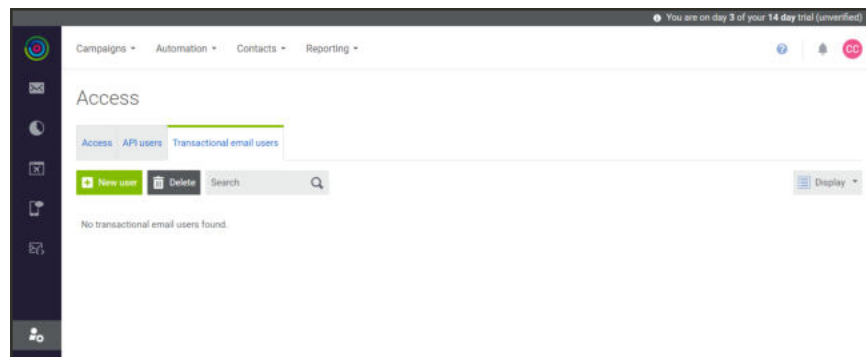
API Users List

## Transactional Email Users

Transactional email messages are automatically generated by the system in response to an event, such as an order confirmation, shipping notification, or password change.


Transactional email messages are in a legally distinct category, and must not contain any content that is related to marketing or sales.

To send transactional email through the API you can use either the REST operation Send transactional email or the SOAP method SendTransactionalEmail. Transactional email is sent by SMTP, and requires a dedicated user email address. To learn more, see [Transactional email - an overview](#).



Transactional Email Users

### To add a transactional email user:

1. Tap the **Settings** () icon at the bottom of the sidebar. Then on the menu, choose **Access**.
2. On the Access page, choose the **Transactional email users** tab.
3. Tap **New user**. Then under User Details, do the following:

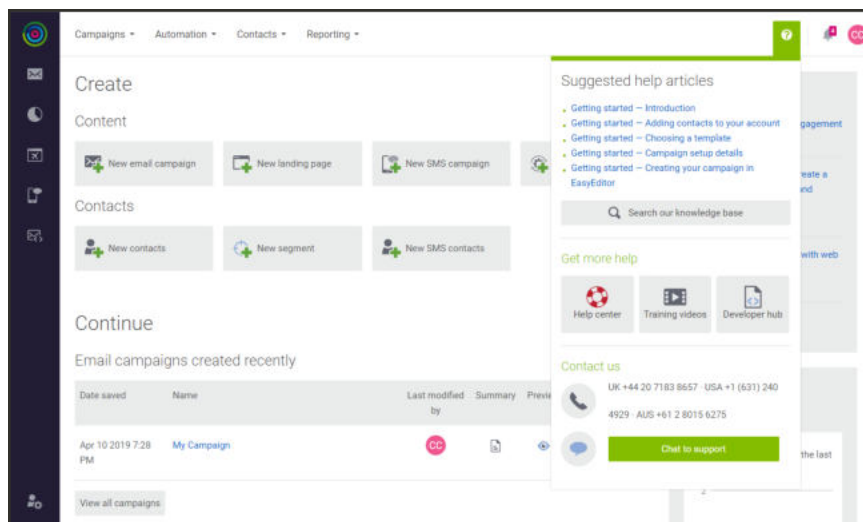
- a. Accept the randomly-generated **Email address**. Each transactional email user is assigned a unique email address.
- b. In the **Description** field, describe how the account is to be used.

Because this field appears in the list after the randomly-generated email address, it should make the user easy to identify.

## Create a Campaign

Engagement Cloud includes a large selection of professionally-designed email and newsletter templates for a variety of promotions and events. You can use any of the prepared templates, or design your own.

As you become familiar with Engagement Cloud, take advantage of the wealth of information that is available to you at all times. Help resources include online chat, suggested articles that relate to your current activity, training videos, and the Developer hub.

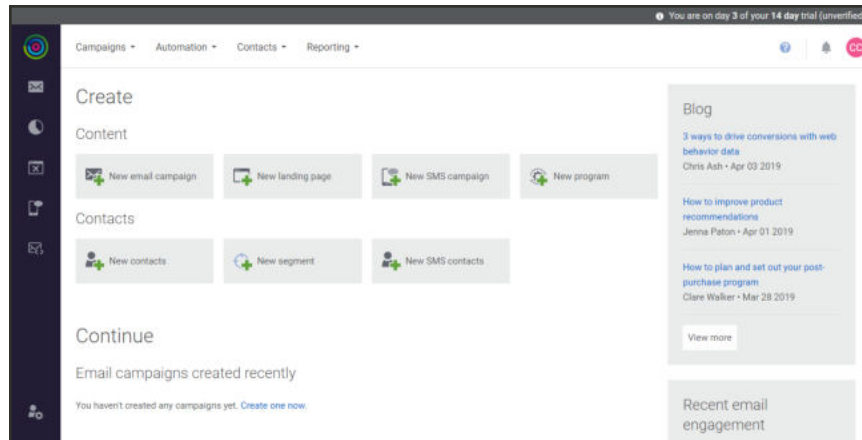


*Help Resources*


In the following example, you will rework a prepared template for the Magento Luma demo store, and become familiar with different types of content building blocks and editing techniques.

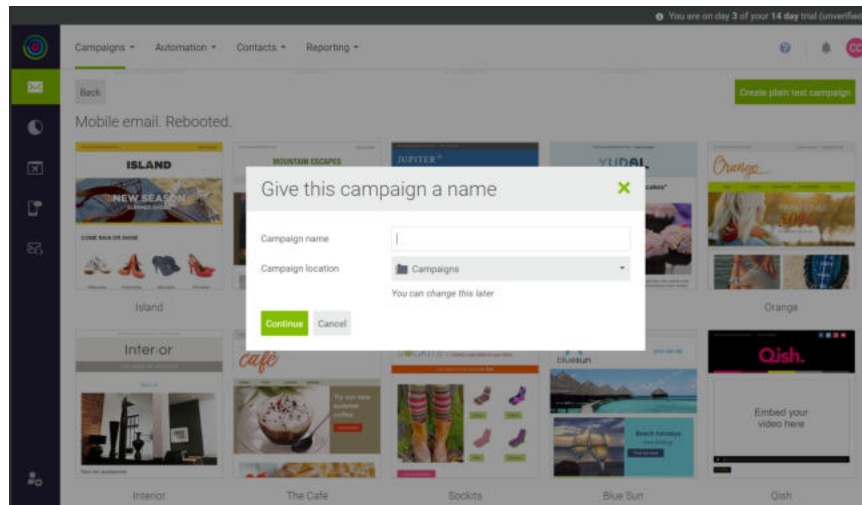
### Step 1: Create a Campaign

1. Do one of the following;
  - On the **Create** page, tap the **New email campaign** tile.
  - In the main menu under **Campaigns**, choose **New Campaign**.



*Create New Email Campaign*

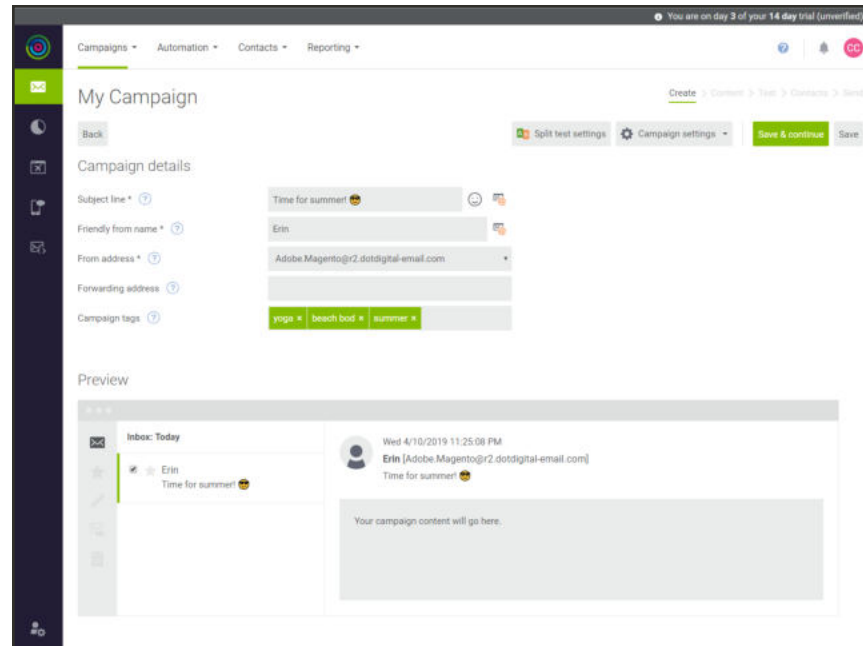
2. On the Free Templates tab of the Choose a Template page. Scroll down to find the template you want to use. Then, do the following:
  - a. Hover over the thumbnail image, to show the Select and Preview buttons. Then, do the following:
    - Tap **Preview** (  ) to see a mockup of the template.
    - Tap **Select** to choose the template for your campaign.
  - b. When prompted, enter the **Campaign name**, and accept the default **Campaign location**. Then, tap **Continue**.



*Campaign Name and Location*

- c. For an overview of the process, click **setting up your campaign** in the message at the top of the page.

- d. Under **Campaign Details**, complete the fields for the header information of the campaign email. To learn more, see the [field descriptions](#).
- e. Scroll down to see a **Preview** of the message. Then, tap **Save & continue**.



*Preview*

## Step 2: Add Your Campaign Content

Before you get started, it's important to know that you can save your work at any time. If you log out and continue your work later, you can find the most recently saved version of your campaign in the menu under Campaigns > My Campaigns. To continue editing, find your campaign in the list, and click its name.

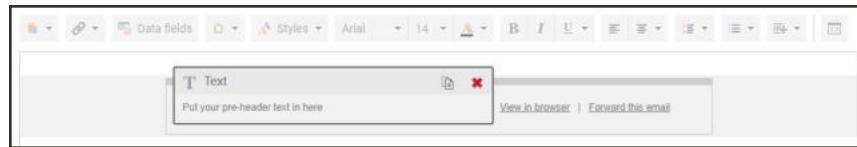
The content editor uses building blocks to represent each type of content that can be added to the template. The Build tab of the sidebar on the left displays the selection of building blocks that you can drag and drop into position. For this example, we will replace the sample content in the template with content of our own.

The following instructions walk you through each section of the template, and introduce editing and formatting tools, and techniques.

### Complete the Preheader (Optional)

The space above the header can be used to enter a brief message. You can either click the text box, and enter the text that you want to appear above the header, or delete the placeholder text.





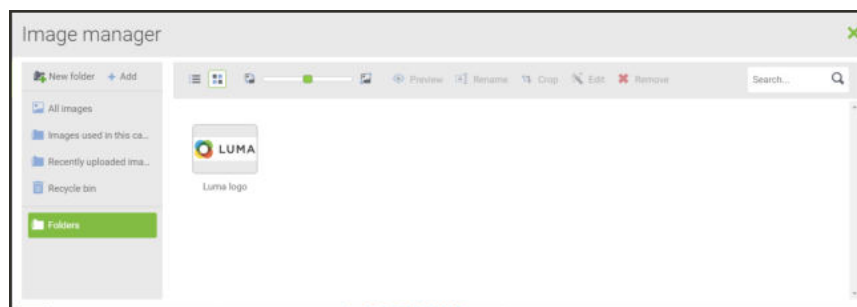
*Preheader Text*

## Upload Your Logo

- a. On the **Build** tab, scroll down and expand the **Images** section.
- b. To upload your logo, click **Manage**. Then, **click here** to upload the image.
- c. Choose the image that you want to upload.

Image manager is similar to **Media Storage**, and is used to organize images that are available in your Engagement Cloud account.


It is recommended to limit the combined size of all images in a campaign to less than 100kb.

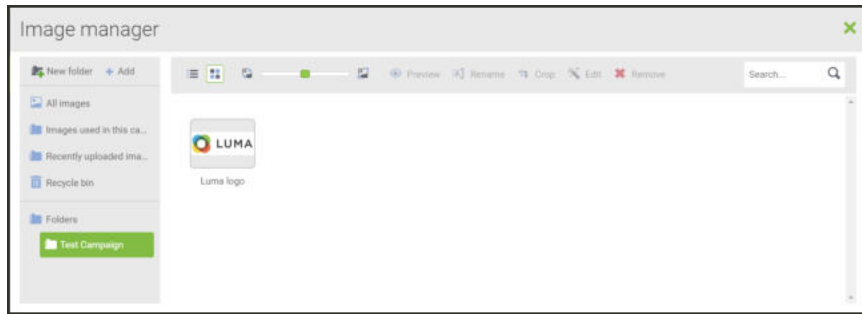


*Image Manager*

- d. To organize your images, click **New folder** in the upper-left corner. Then, enter a **name** for the untitled folder. The new folder is nested below the original parent folder.

You can create as many folders as you need, and organize them any way you want. Over time you will upload many images to your account, and it's important to organize them in a way that makes them easy to find.

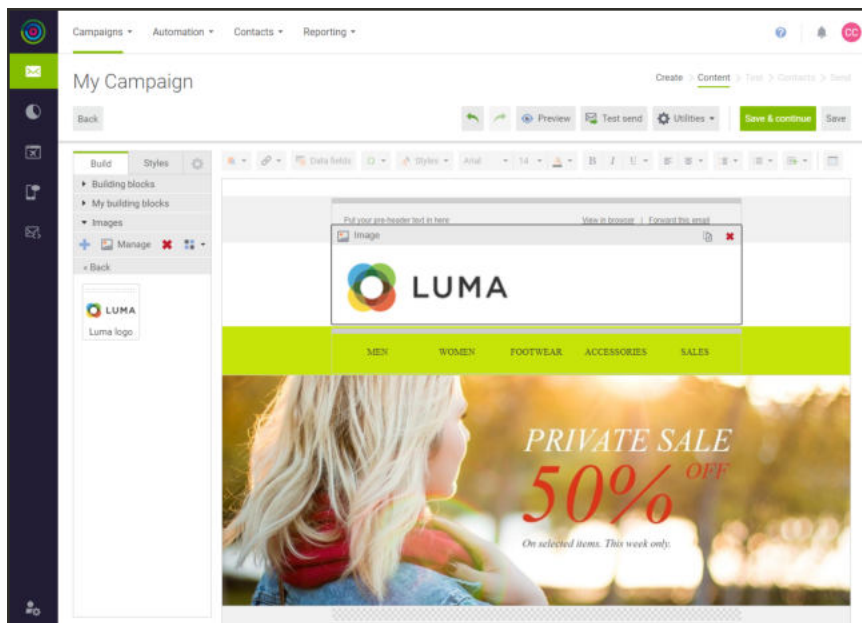
- e. In the sidebar, click the parent folder that contains the logo that you uploaded. Then, drag the image to the new folder. Then, click **Close** (  ) in the upper-right corner to return to the content editor.



*New Folder*

The logo that you uploaded appears in the sidebar, where it can be dragged into position.

- f. Drag your logo to the header to replace the placeholder image in the template.

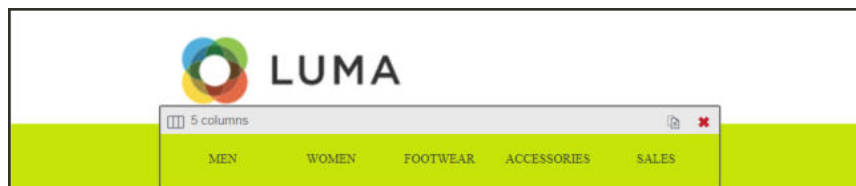


*Drag Image to Template*

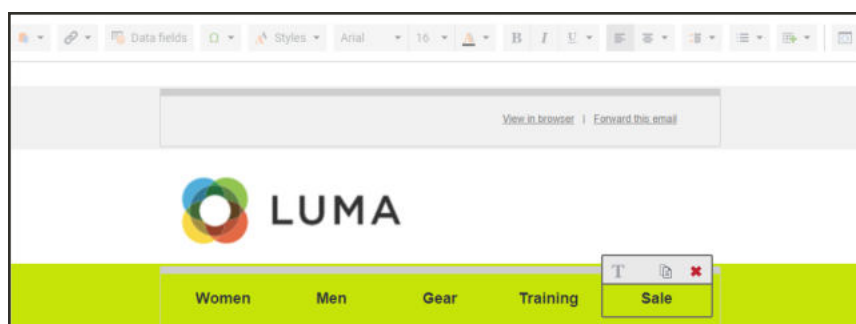
### **Edit and Format Text**

The next section of the template represents your store’s menu. However, it’s actually a building block with a multi-column layout, similar to a table. The text in each cell can be edited and formatted separately. The Columns building block in the sidebar can be used in many ways to control the text layout.

- a. Click the menu area to see the multi-column layout. The Columns building block is located in the sidebar under Layout.



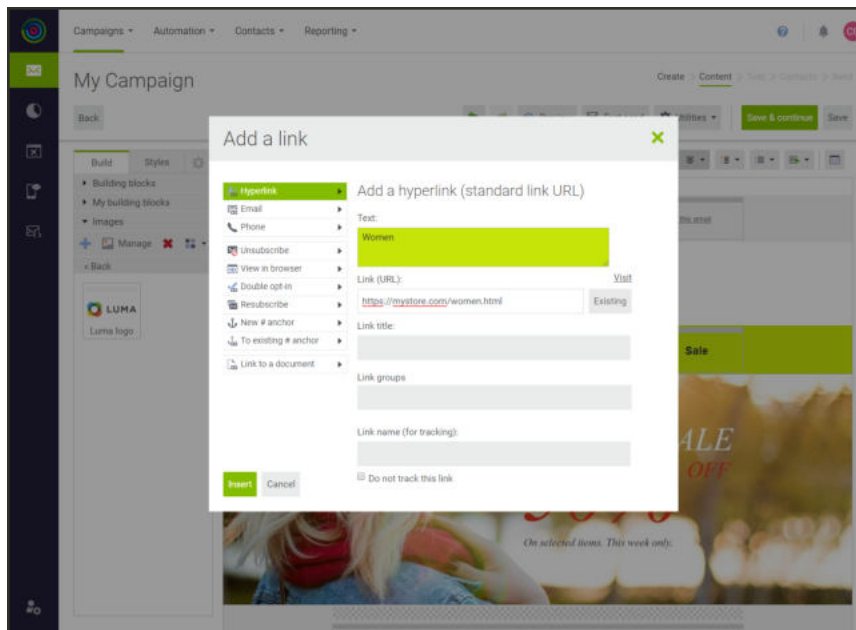
- b. Click each cell, and enter the menu options for your store. Then, use the toolbar to change the font, size, and style of the text, as needed.



## Add Links

To link each menu option in the template to your store, do the following:

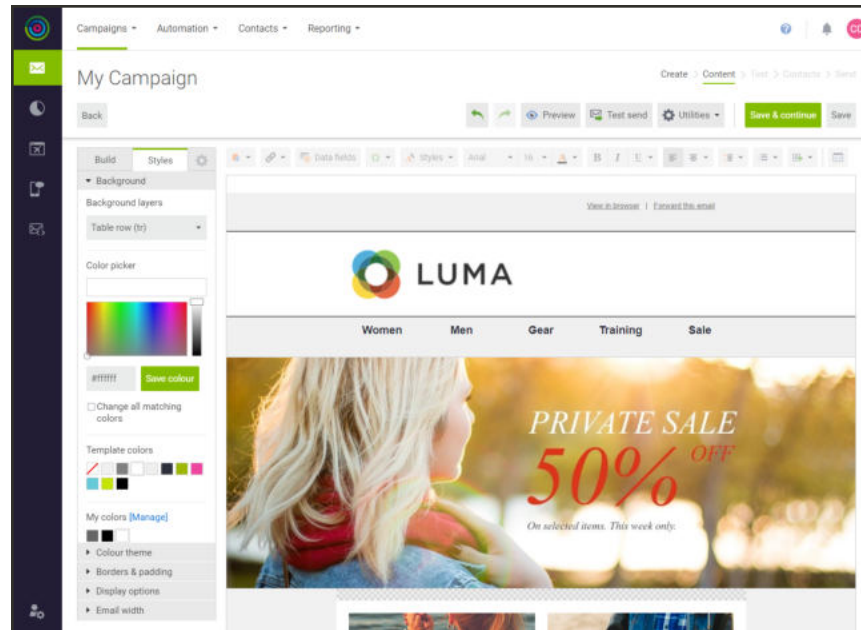
- a. Open your store in another window, and click the first menu option. Then, copy the full **URL**.
- b. In the template, select the text for the first menu option. Then in the toolbar, click the **Hyperlink ( )** tool.
- c. In the **Link (URL)** field, paste the link that you copied from your store.
- d. Enter the **Link title**. Then, enter the **Link name** for tracking.
- e. When complete, tap **Insert**.
- f. Repeat these steps to link each menu option to your store.



*Add a Link*

### Change the Background Color

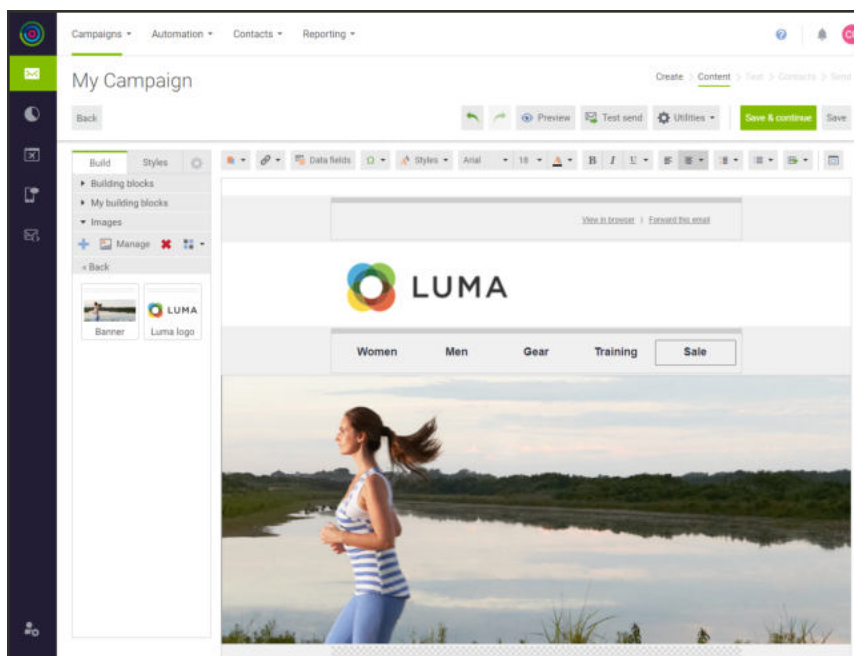
- a. In the sidebar, choose the **Styles** tab. Notice that Background layers is set to “Element table).” In the underlying HTML of the template, the menu background is actually part of a table.
- b. In the template, hover over the menu background to highlight the entire row.
- c. In the sidebar under the color picker, enter the hexadecimal code for the background color of your store’s menu. In the Magento Luma store, the background color of the menu is #f0f0f0.
- d. Tap **Save colour** to save the color in the My colors section of the sidebar.



*Background Color*

## Replace the Banner

- a. On the **Build** tab of the sidebar, under **Images**, click **Add Image** ( + ).
- b. Choose the banner image that you want to upload. After a moment, the image appears in the sidebar.
- c. From the sidebar, drag the new banner to replace the placeholder image.



*Banner*

## Add Featured Products

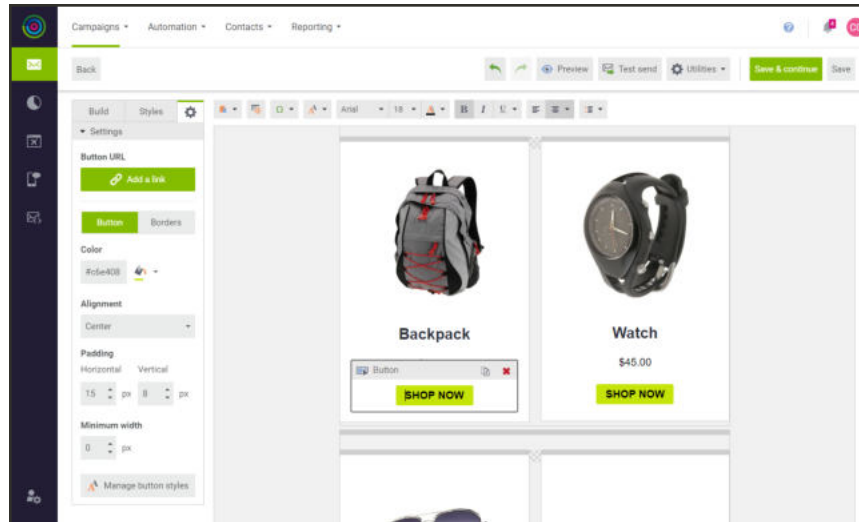
Engagement Cloud gives you the ability to dynamically incorporate data from your store into a template. However, for this simple example, product data is added as static images with links to your store. Although this template includes two rows of products, only one row is included to reduce the number of images. The “Shop Now” blocks was also removed from the template, because it didn’t introduce any new editing techniques.

- a. Upload the image for each featured product.
- b. Edit the text, as needed, for each featured product.

The price can be updated as any other text field. To change the currency, simply type a dollar sign, or any other currency symbol that you need.

- c. To update the product buttons, click the button to display its settings in the sidebar.
- d. Paste the **Button URL** for the corresponding product detail page. Then, update the color and format of the button as needed.


- e. Repeat these steps for each product button.

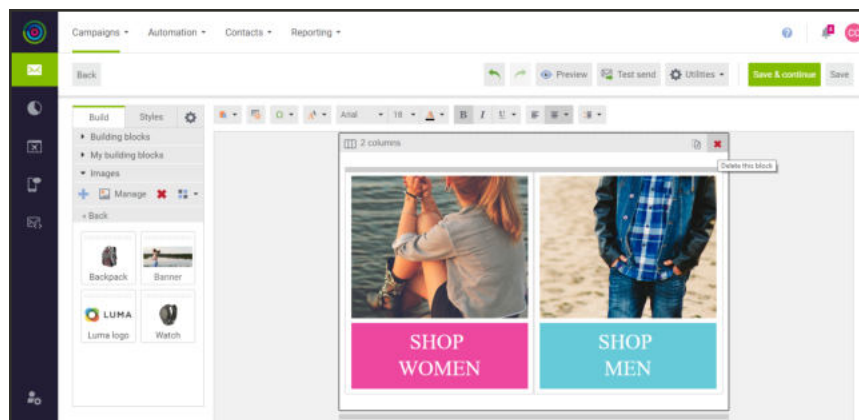


*Button Settings*

### Delete Blocks

To simplify this example, only one product block is needed from the template. You can delete the other two blocks that feature products from the catalog.

- a. Find the block with the “Shop Women” and “Shop Men” tiles.
- b. Hover over the outer container. Then in the upper-right corner, click **Delete** (  ).

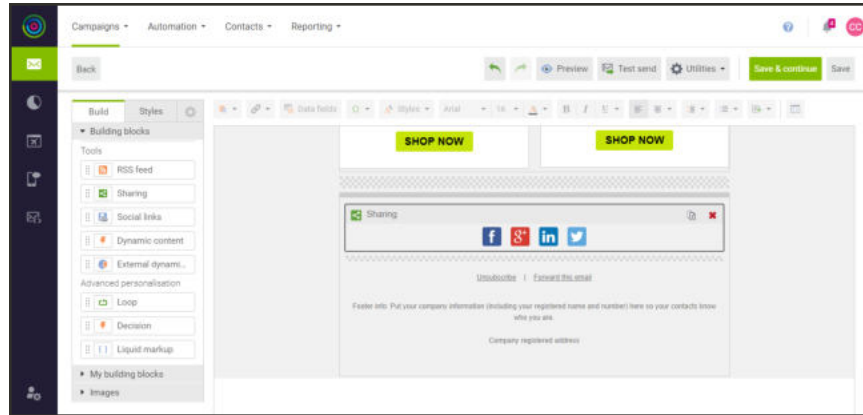


*Delete Block*

- c. Delete the second product block, so only the one that you updated remains.

## Add Social Media Links

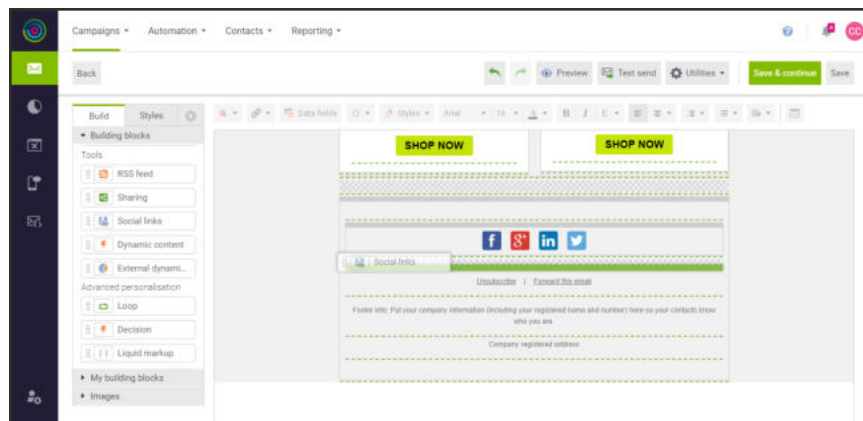
- a. Scroll down to the “Sharing” block with the social media placeholders.



*Social Media Building Block*

- b. In the building blocks sidebar under **Tools**, drag the **Social links** building block into position below the “Sharing” block with the placeholders.

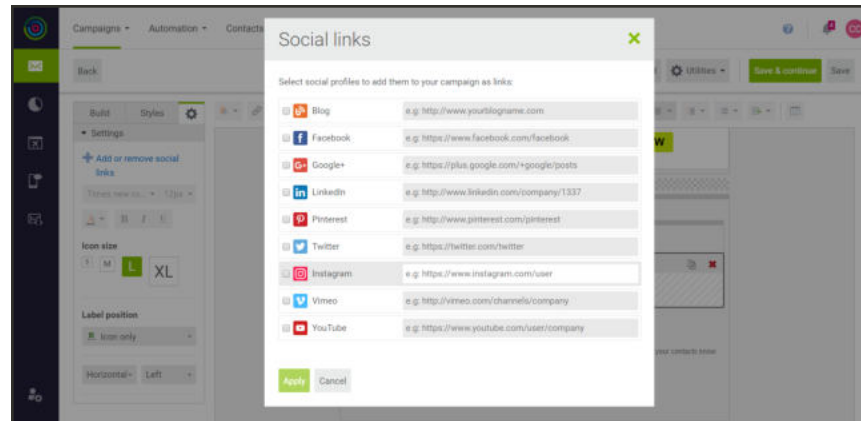
An empty social links block appears below the placeholder.




*Social Media Building Block*

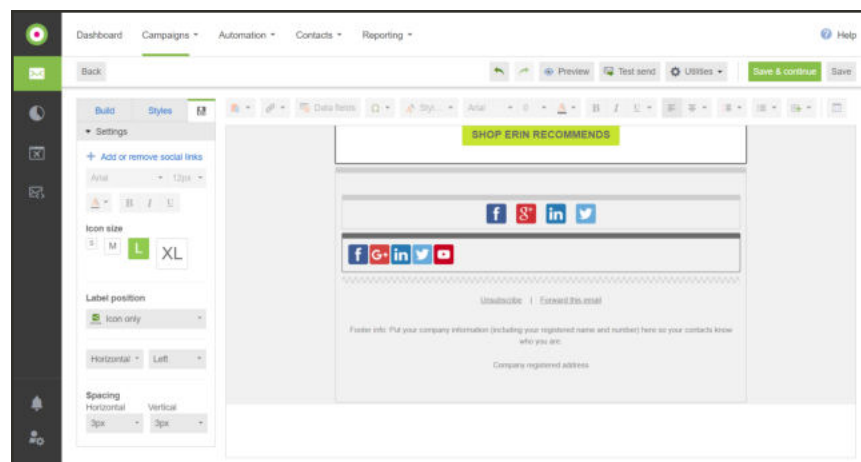
- c. Click the empty building block to open the Social links settings.
- d. Mark the checkbox of each social link that you want to include in the template.
- e. For each social link, paste the **URL** of your company profile page.
- f. When complete, tap **Apply**.





*Social Links*

- g. To adjust the format and spacing of the buttons, click anywhere in the social links building block. You can experiment with these settings to adjust the size and format of the buttons. To make your buttons look like the template, do the following:
- h. In the sidebar under **Label position**, set **Horizontal** alignment to “Center.”
- i. Under **Spacing**, set **Horizontal** to “15px” and **Vertical** to “None.”
- j. To delete the placeholder social media links, click **Close** (  ) in the upper-right corner.

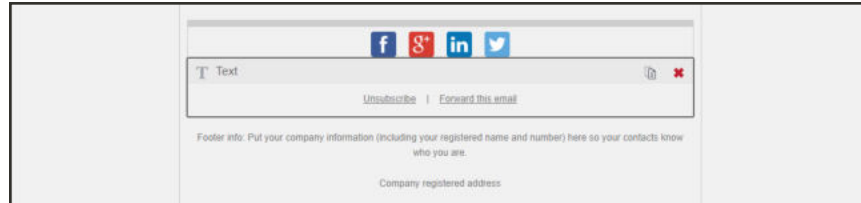


*Formatting the Social Media Links*

### Complete the Footer

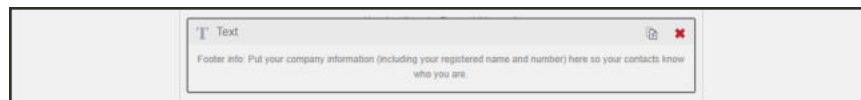
The information at the bottom of the template is important, and in many countries is required by law. You must provide a mechanism for recipients to unsubscribe, and clearly identify the sender of the email.

- a. Do not change the **Unsubscribe** and **Forward this email** links, because they contain code that manages each operation. However, you can format the text any way you like.



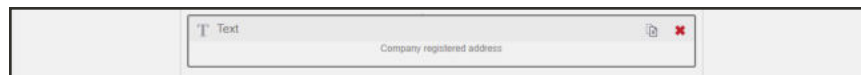
*Unsubscribe / Forward This Email*

- b. Click the **Footer info** text block, and enter your company information, including your registration number, if applicable, so recipients know who has sent the email.



*Footer Info*

- c. Click the **Company registered address** text block, and complete the information. In this example, we added a link to the Contact Us page on our site.



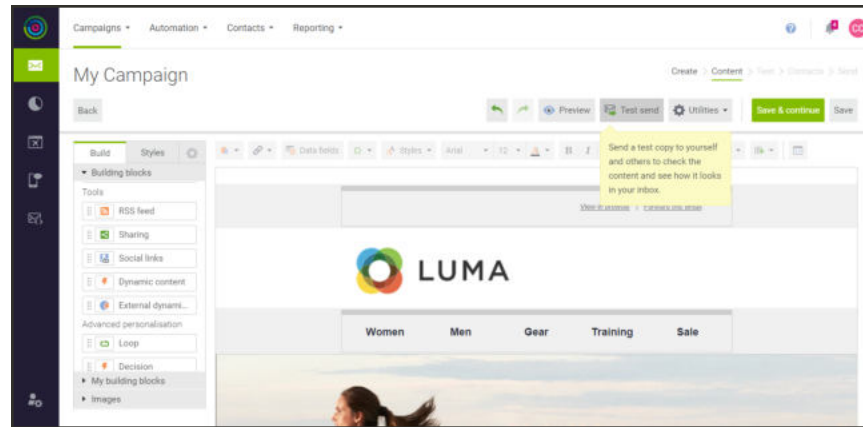
*Company Registered Address*

- d. When complete, tap **Save**.

The template is now fully customized for your store.

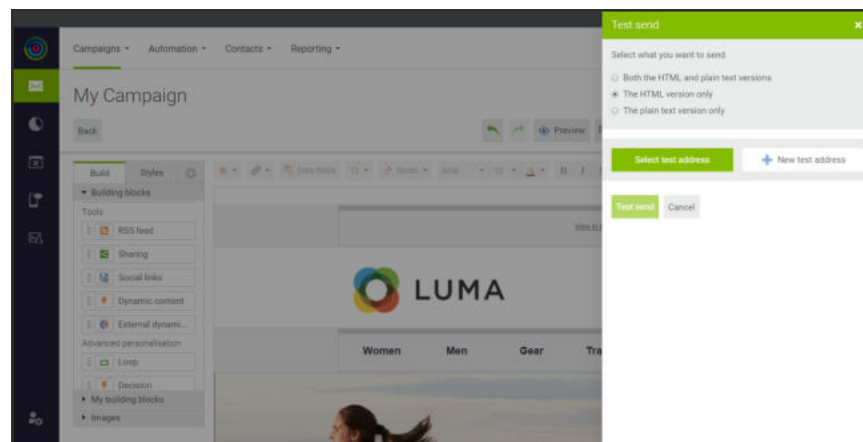
### Step 3: Send a Test

1. To test your campaign, tap **Test send** in the template header.



*Test Send*

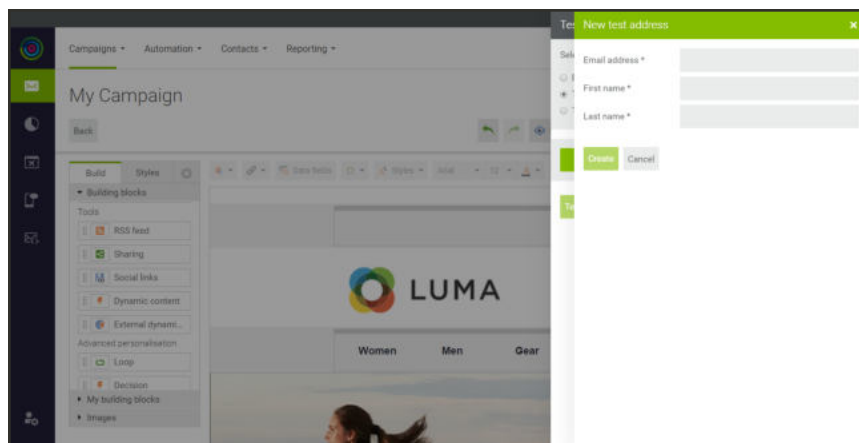
2. Select the type of output you want to send from the following:
  - HTML and plain text
  - HTML only
  - Plain text only



*Test Send Options*

3. To send the test to the address that is associated with your account, tap **Select Test Address**.
4. To send the test to more addresses, do the following:
  - a. Tap **New Test Address**.
  - b. Enter the **Email address**, **First name** and **Last name** of the recipient.

- c. Tap **Create**.



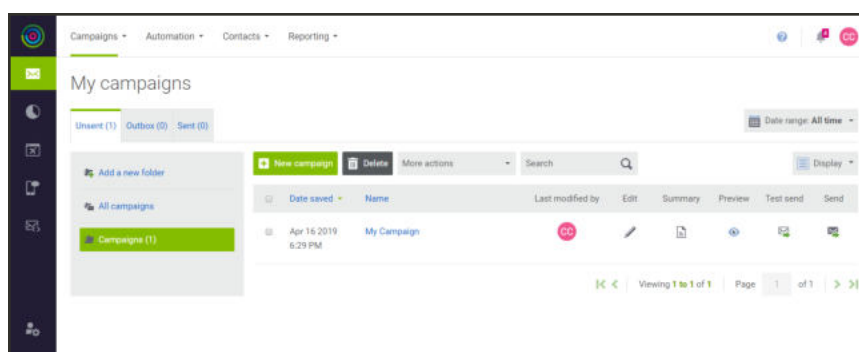
*Test Send Options*

- d. Repeat these steps to add as many recipients as you want.
5. When you are ready to send the test campaign, tap **Test Send**. If prompted, tap **Save and send**.
  6. Check your email to see how it looks!

#### Step 4: Review the Summary Report

The Summary Report validates the campaign, lists any errors that are found, and suggests areas for improvement. In addition to the Summary Report, the Reports menu has a selection of **Marketing Automation** reports.

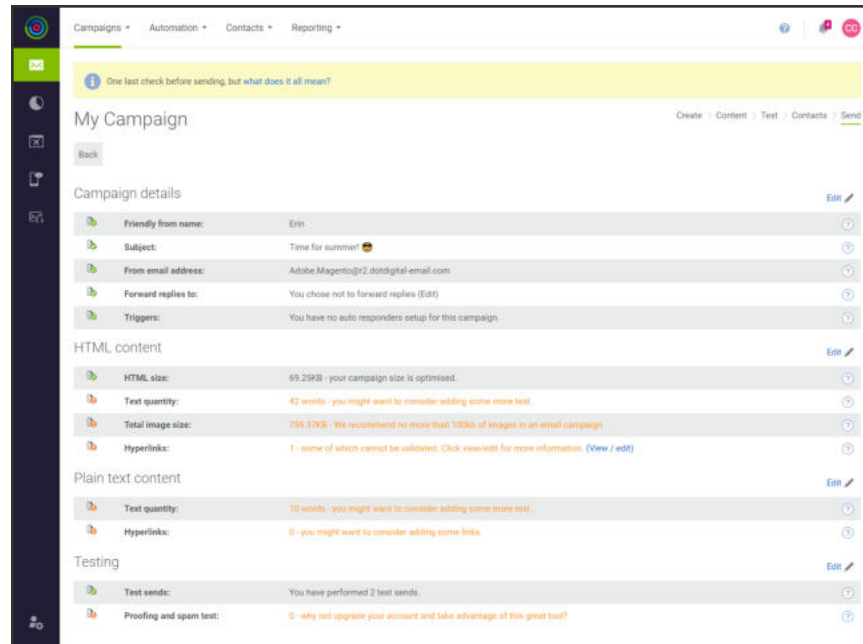
1. On the **Campaigns** menu, choose **My Campaigns**.



*My Campaigns*

2. In the record for your test campaign, click **Summary** (  ) to view the summary report.

Look for the red text in the report. They are tips and recommendations for things you can do to improve your campaign.

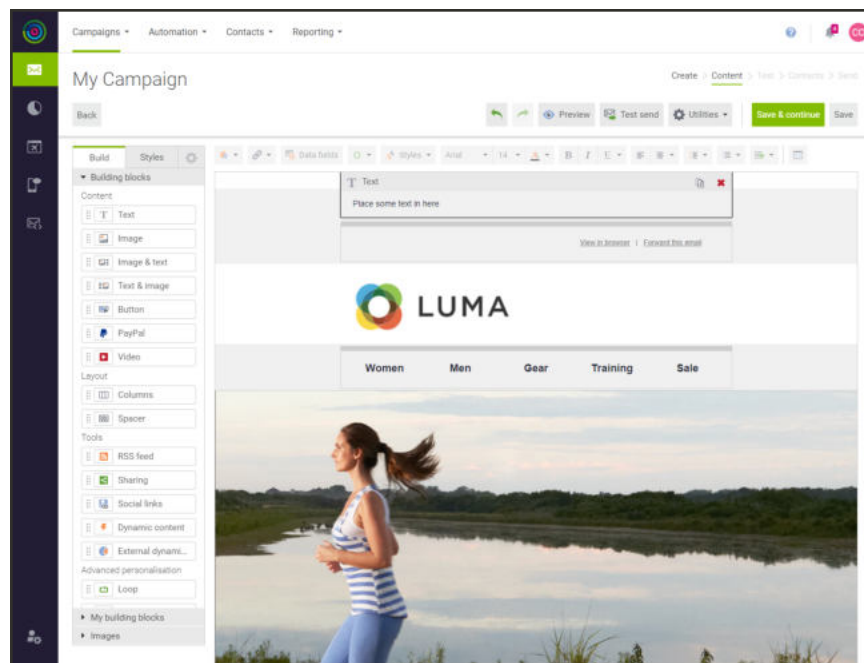


*Campaign Summary Report*

**Step 5: Add a Personal Note**

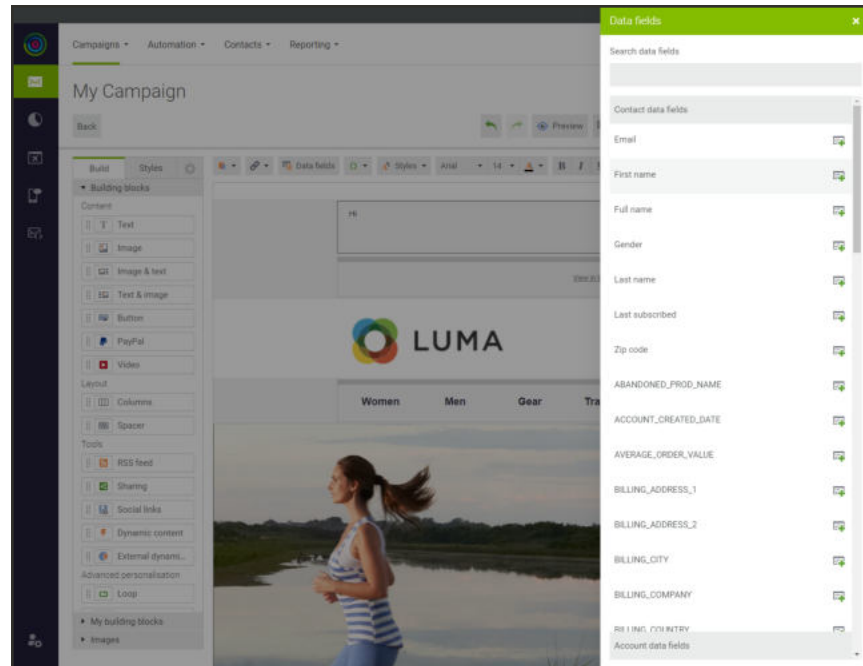
In this step, we'll add a personal note with a link, and then do another test run.

1. On the **Build** tab of the sidebar under **Building blocks**, drag a **Text** block to the top of the template.



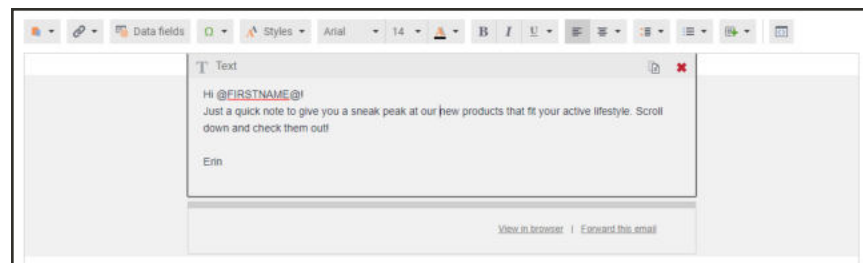
*Text Block for Personal Note*

- a. Enter the word “Hi” to begin the greeting, followed by a blank space.
- b. In the toolbar at the top of the template, tap **Data Fields**.
- c. In the list of data fields, choose **First name**.



*Data Fields*

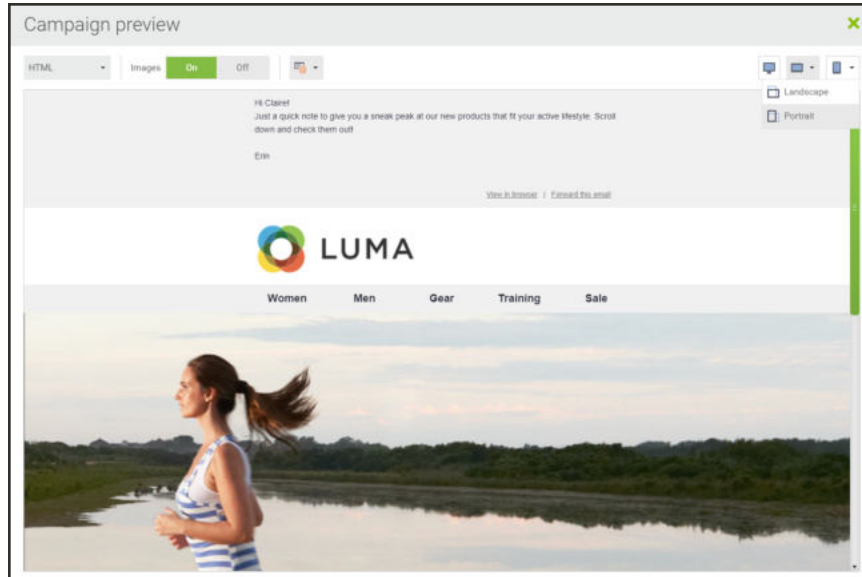
- d. Write a note to accompany the campaign.
2. When complete, **Save** your work.




*Personalized Greeting*

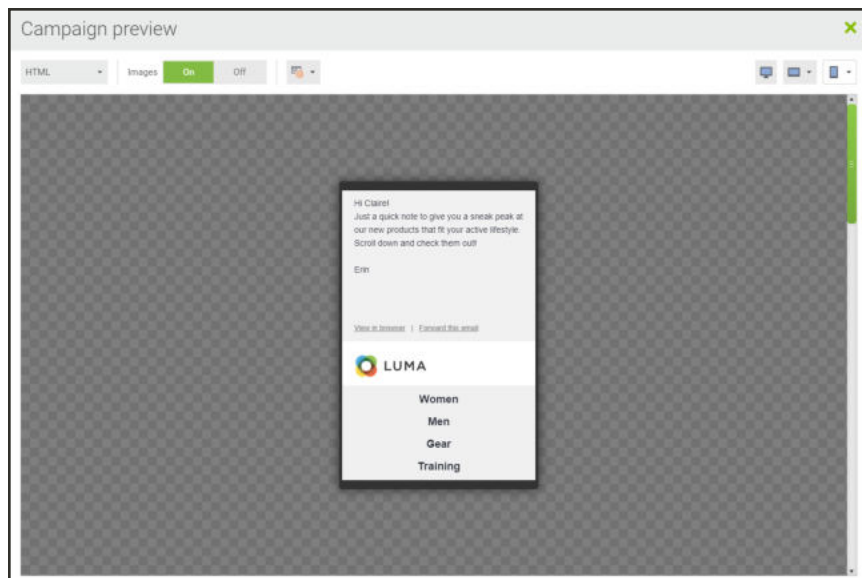
### Step 6: Preview the Campaign

1. In the button bar at the top of the workspace, tap **Preview**.



*Desktop Preview*

2. In the upper-right corner of the preview window, click **Phone** (  ), and choose **Portrait** to see how the message looks on a mobile device.



*Phone Preview*

3. In the lower-left corner of the preview window, tap **Close**.



## Congratulations!

You have created your first campaign!

### Field Descriptions

FIELD	DESCRIPTION
<b>CAMPAIGN DETAILS</b>	
Subject line	The subject line is what the recipient sees in their Inbox summary. Options: <ul style="list-style-type: none"> <li>Emoji To insert an emoji, click the emoji icon to the right of the field.</li> <li>Data Field To include a data field, click the field chooser to the right of the field.</li> </ul>
Friendly from name	Replaces the full email address in the Inbox. To include a custom data field, use the field picker to the right of the field. Option: <ul style="list-style-type: none"> <li>Data Field To include a data field, click the field chooser to the right of the field.</li> </ul>
From address	The address of the sender of the email.
Forwarding address	To forward the message to additional email addresses, separate each with a comma. Option: <ul style="list-style-type: none"> <li>Data Field To forward the message to an email address in a data field, enclose the field name in ampersands. (@...@)</li> </ul>
Campaign Tags	Tags are used to filter campaigns for reports. To add another tag, press the Tab key.

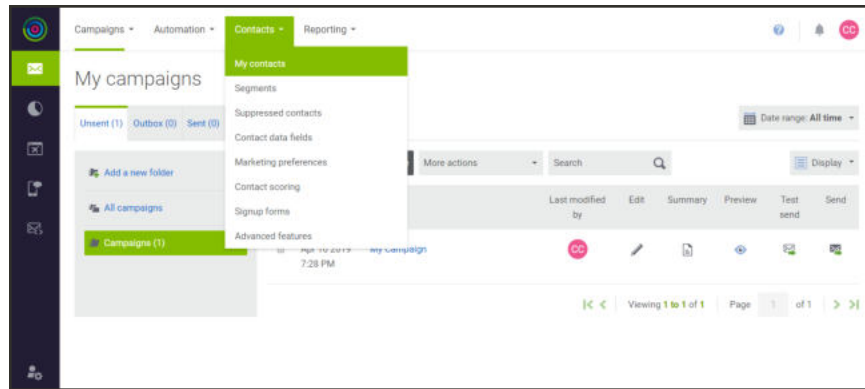
## Import Your Contacts

Your Engagement Cloud account is **synced** with your store, and maintains up-to-date address books of your customers, guests, and subscribers.

### To view your contacts:

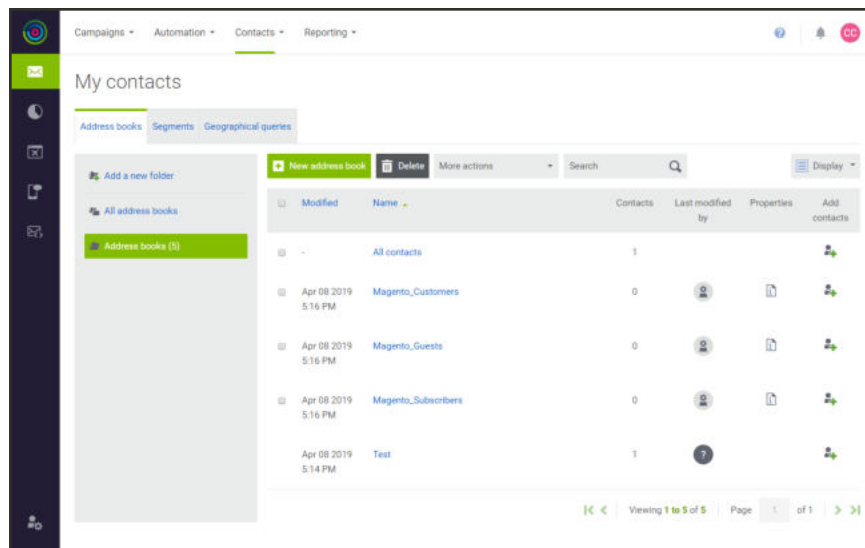
1. On the Engagement Cloud menu, choose **Campaigns > My campaigns**.

The contact list in the main menu at the top of the page includes customer, guest and subscription data that is automatically imported from your store.



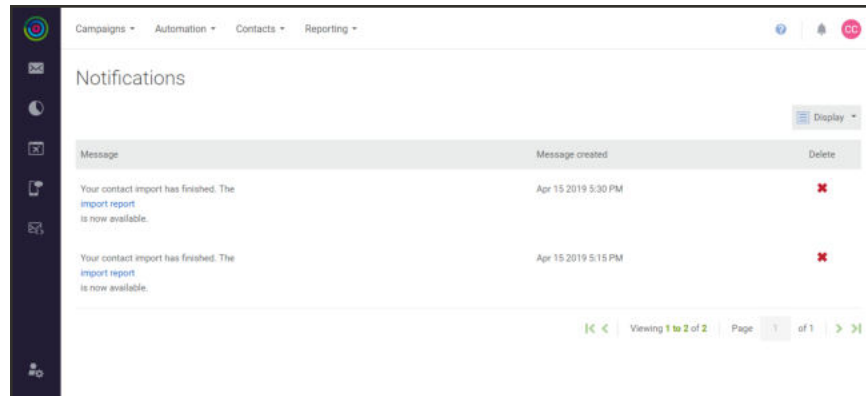
*My Contacts*

2. To view the import report, click the **Notifications** bell (  ) in the upper-right corner.



*Address Books*

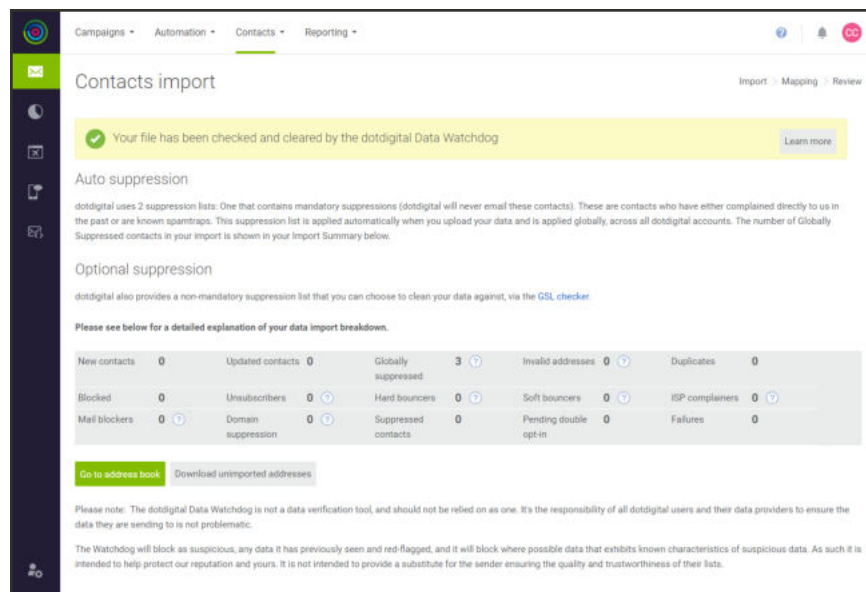
3. In the first message, click **import report**.



*Notifications*

4. In the Notifications list, click **import report**.

The Contacts import report includes a summary of all subscribers as well as duplicates, failures, soft and hard bounces, invalid email addresses, and those who have unsubscribed, or have been blocked, globally suppressed, or otherwise blacklisted. You can use this report to help keep your data clean.



*Import Report*

5. After reading the report, tap **Go to address book**.
6. In the main menu, return to **Contacts > My Contacts**. This time, click the **Magento\_Customers** address book.
7. To see all the things you can do with your customer data, click **More actions**.

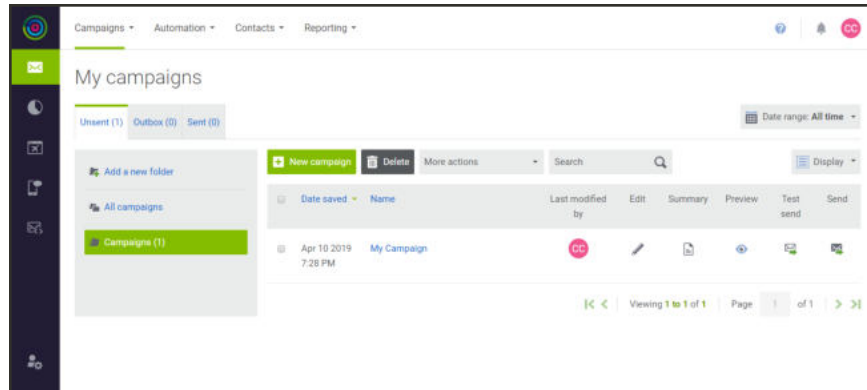
Using what we've covered so far, you should be able to create a newsletter campaign and send it to your list of subscribers.

## Schedule Your Campaign


You now have a campaign and a list of customers. The next step is to schedule the campaign, and send it on its way.

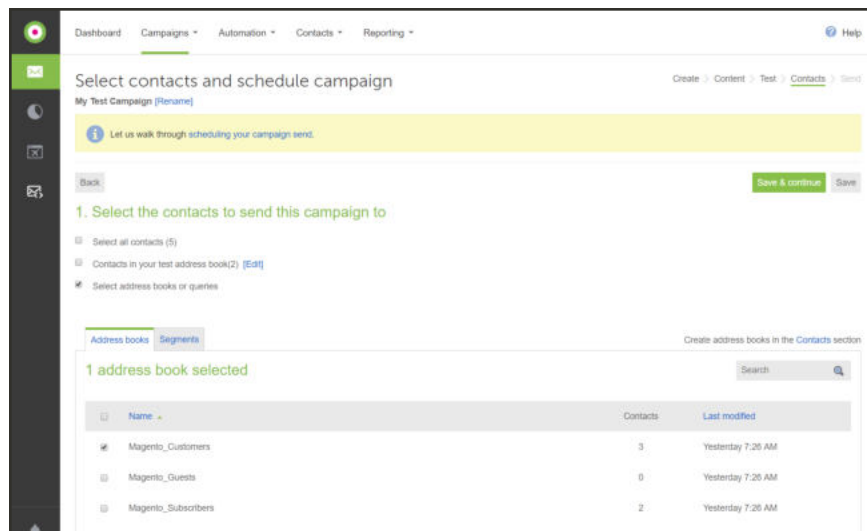
### To schedule a campaign:

1. On the main menu under **Campaigns**, choose **My Campaigns**.




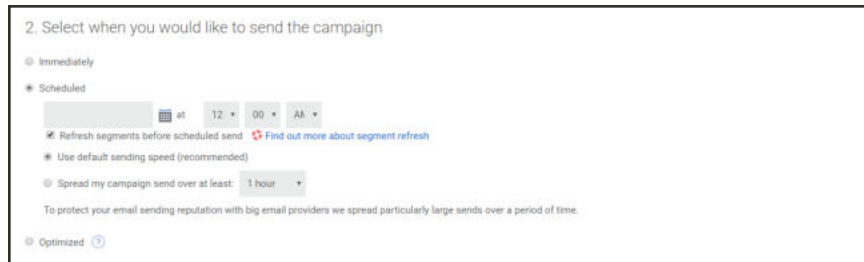
*Send Your Campaign*

2. Find your test campaign in the list, and in the last column, click **Send** (  ). Then, do the following:
  - a. Under Step 1, mark the checkbox of each address book that contains contacts to be targeted by the campaign.



*Choose the Address Book*

- b. Under Step 2, choose the **Scheduled** option. Then, click the **Calendar** (  ) to choose the **Date** and enter **Time** that the campaign will be sent.



*Schedule the Campaign*

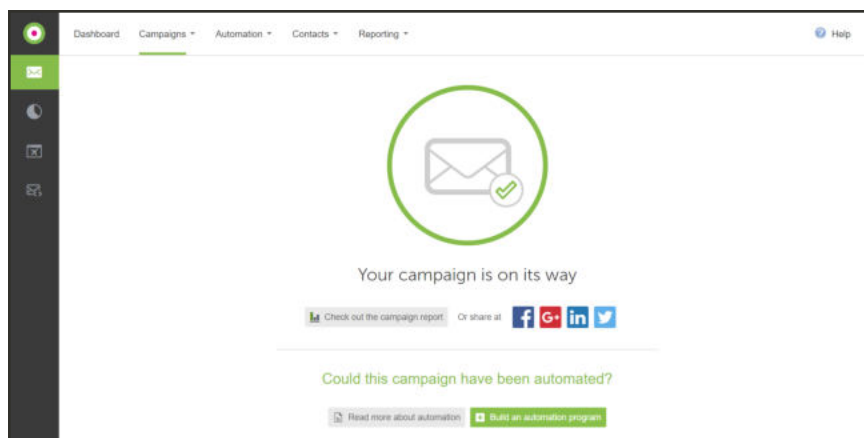
- c. Under Step 3, select “Yes” if you want to automatically resend the campaign to anyone who hasn’t opened it after a specific number of days. you can also change the subject line of the message. By default, campaigns are not sent a second time.



*Remail Options*

- 3. Tap **Save & continue**.
- 4. Take one last look at the report before you send the campaign. Then, scroll down to the bottom and tap **Send campaign immediately**. When prompted to confirm, tap **Send**.

Congratulations! Your campaign is on its way!



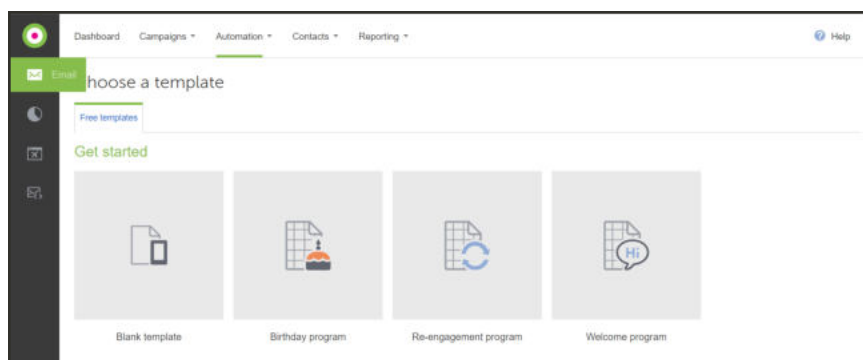
*Your Campaign Is On Its Way*

- 5. To see the results, tap **Check out the campaign report**.

- On the menu, choose **Dashboard** to see your progress. You have completed the first four tasks, and a notification is waiting for you in the upper-right corner.

## Automate a Campaign

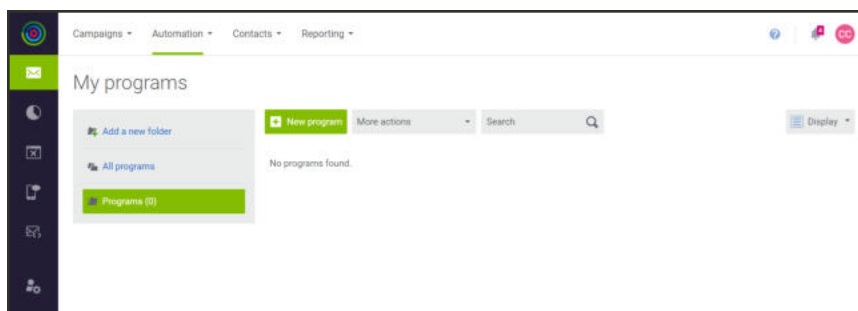
Engagement Cloud includes three prepared automation templates, plus a blank template that you can use to create custom programs. When setting up an automated campaign, you can use existing campaigns, or create placeholders for new ones. This example uses a prepared template to create a simple Welcome campaign with a follow-up message that is sent a week later.



*Choose a Template*

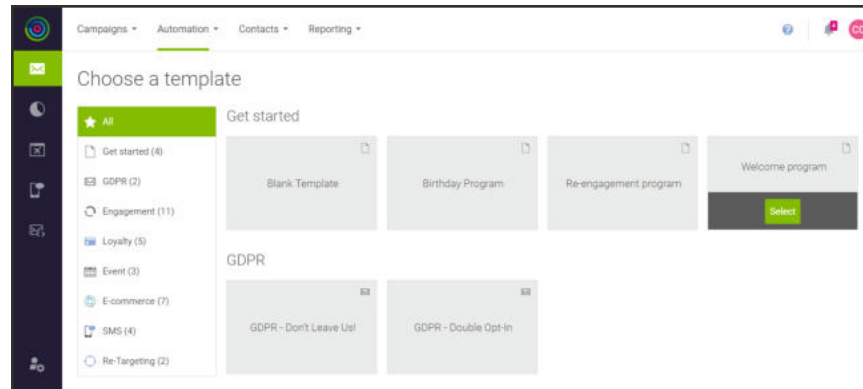
### Step 1: Create a New Program

- On the Engagement Cloud main menu, choose **Automation**. Then above the list of campaigns, tap **New program**.



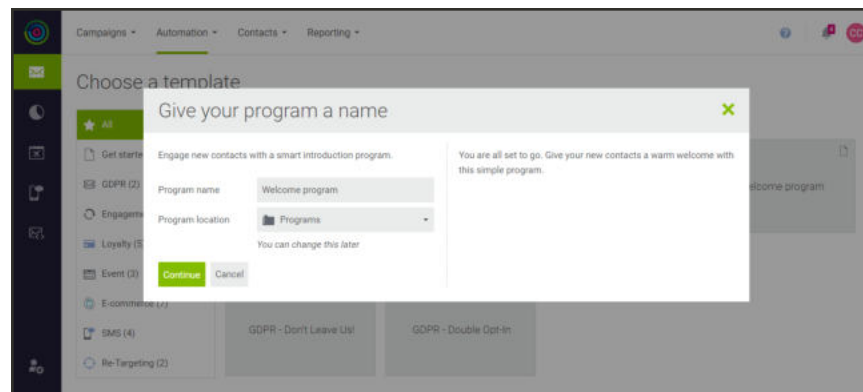
*My Programs*

- In the **Get started** section of templates, hover over the **Welcome program** template, and tap **Select**. Then, do the following:



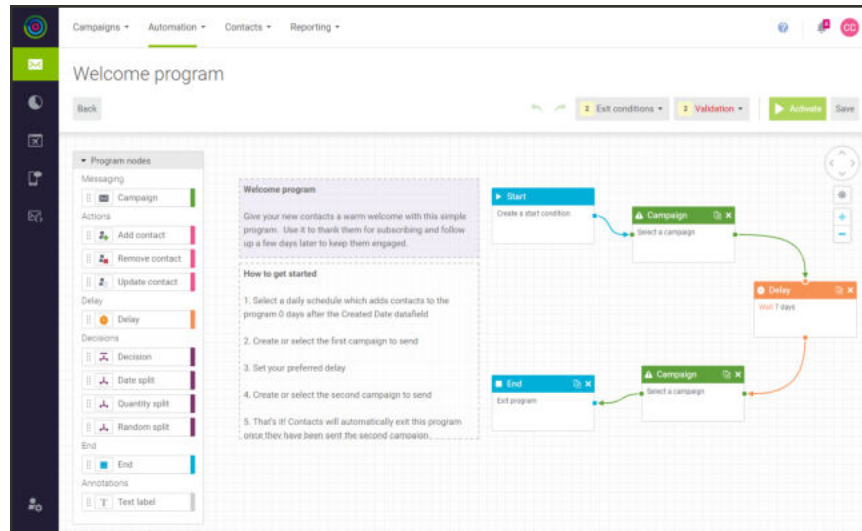
*Select Welcome Template*

3. When prompted, enter the **Program name**. For now, you can accept the Programs folder location. Then, tap **Continue**.



*Program Name*

The Edit program workspace includes a flowchart of the program logic. Each box in the diagram is a node. The panel on the left has a selection of nodes that can be added to the program. You can create sophisticated automated processes using these simple building blocks.

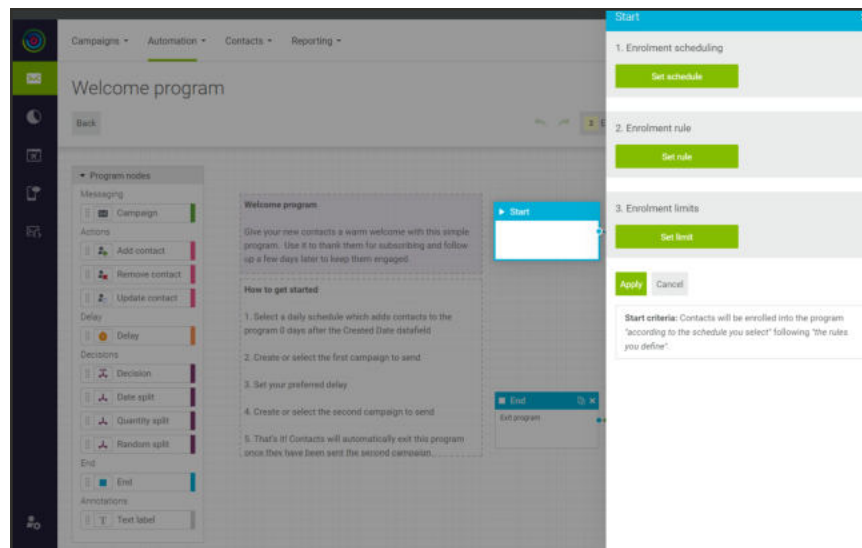


Welcome Program

### Step 2: Complete the Start Options

1. In the flowchart **Start** node, click the “Create a start condition” text box.

The panel on the left provides an overview of the process, and walks you through each step.

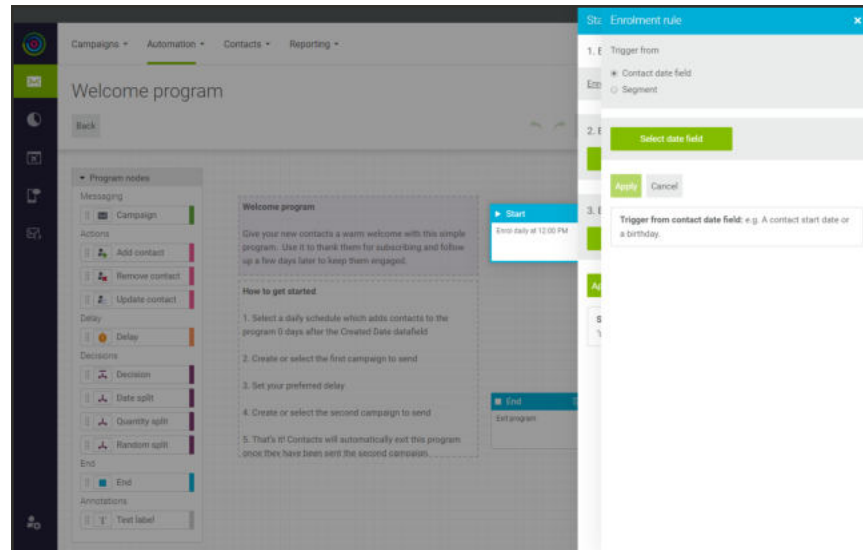


Start

2. Under 1. **Enrolment scheduling**, tap **Set schedule**.
  - a. By default, the Welcome program is scheduled to run **Daily** at **12:00 PM**.
  - b. For this example, accept the default scheduling. Then, tap **Apply**.

The text in the Start node is updated with the schedule.



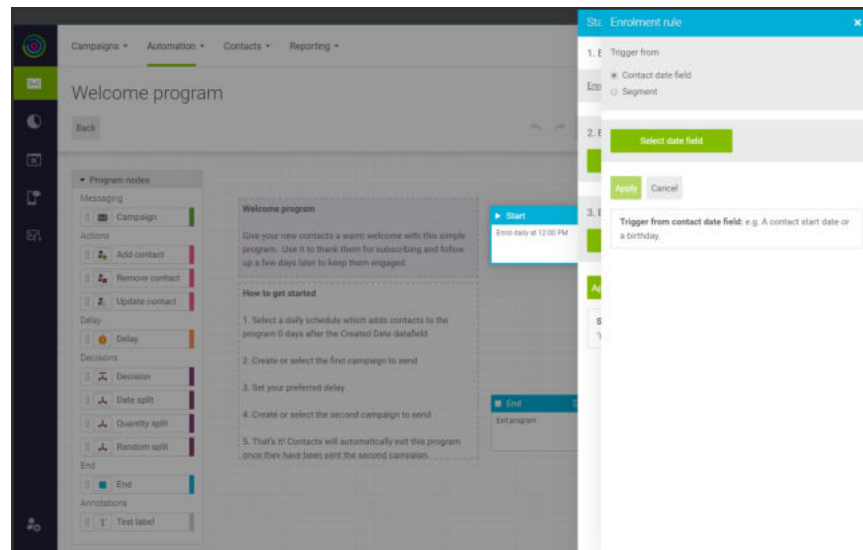


*Enrollment Scheduling*

3. Under **2. Enrolment rule**, tap **Set rule**.

The options describe the event that triggers the rule. For this program, the welcome email campaign will be triggered whenever a new account is created.

Complete the trigger description as follows:

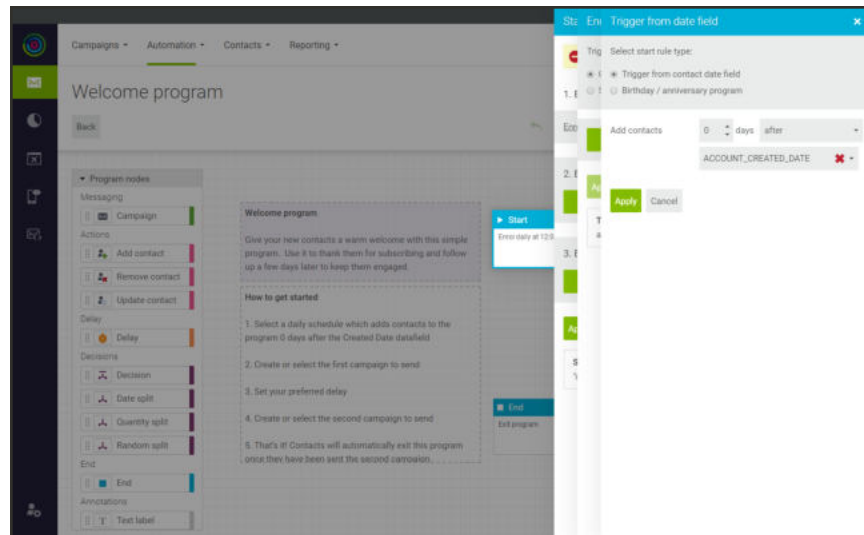


*Trigger from Date*

- a. Under “Select start rule type,” accept **Trigger from contact date field**. Tap **Select date field**. Then, choose **Contact date** as the field that triggers the rule.
- b. Accept “0” for the number of **days** to wait **after** the contact date, for the rule to go into effect. Then, select the date field that contains the value that triggers the rule.

In this example, the field is ACCOUNT\_CREATED\_DATE.

- c. When complete, tap **Apply**.

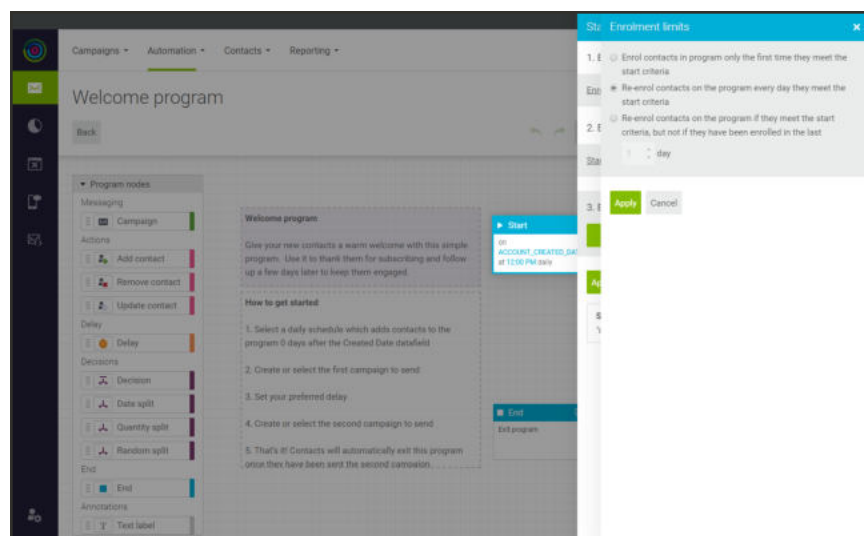


*Trigger from Date Field*

- 4. Under **3. Enrolment limits**, tap **Set enrolment limits**. Then, do the following:
  - a. For this program, accept the default option to **re-enrol contacts every day they meet the start criteria**. Then, tap **Apply**.

This option ensures that every person who signs up for a new account will be included in the next scheduled mailing.

- b. Review the options in the **Start** panel. Then, tap **Apply**.

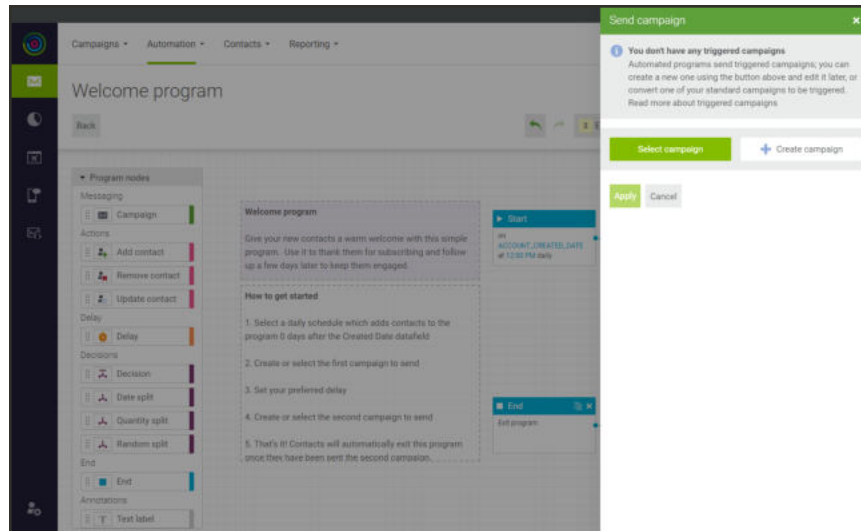


*Enrolment Limits*

### Step 3: Choose the Campaign

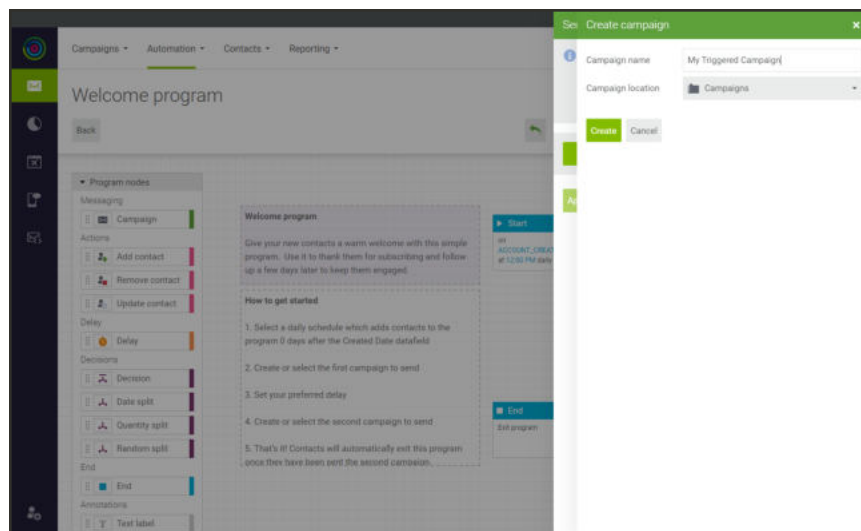
Automated programs send triggered campaigns. You can either choose an existing campaign that is set up to be triggered by a rule, or create a placeholder for a new campaign.

1. In the flowchart, click the **Campaign** node. Then, tap **Create campaign**.



*Send Campaign*

- a. Enter the **Campaign name**, and accept the default **Campaigns location**.
- b. Tap **Create**.



*Create Campaign*

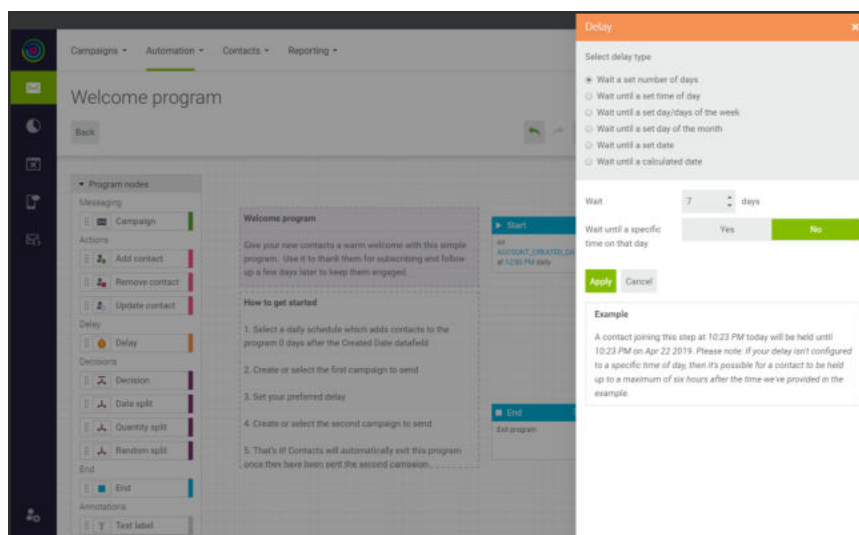
2. Tap **Apply**.

The name of the new campaign appears in the Campaign box.

### Step 4: Set the Delay

You can add a delay to the program to wait a number of days, or until a specific time of day, before sending a follow-up campaign.

1. In the flowchart, click the **Delay** node.
2. Accept the default **Wait** period of **7** days. Then, tap **Apply**.

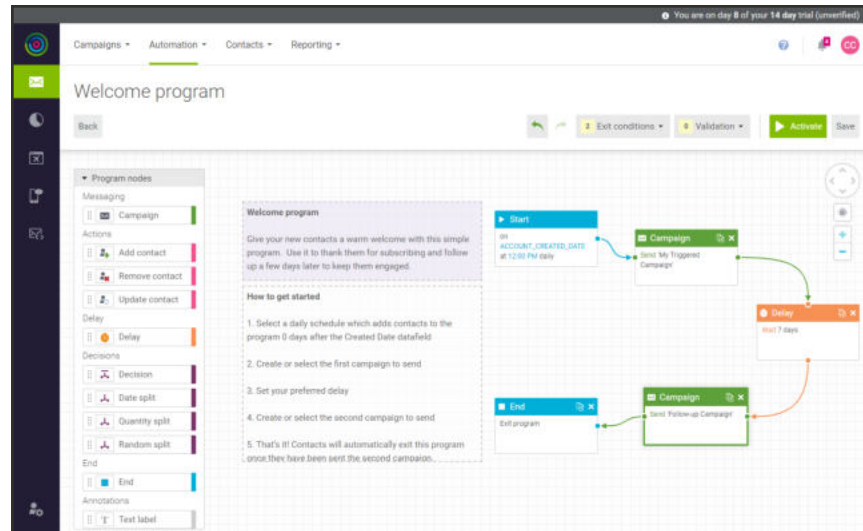


*Delay*

### Step 5: Create a Follow-Up Campaign

1. In the flowchart, click the next **Campaign** node.
2. Enter the **Campaign name**, and accept the **Campaigns** folder as the default **Campaigns location**.
3. Tap **Create**. Then, tap **Apply**.

Your follow-up campaign is added to the workflow.

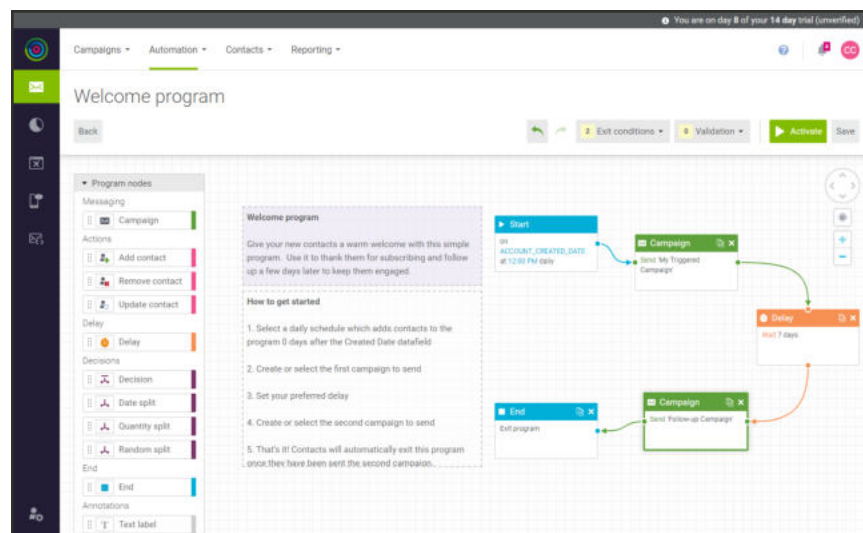


*Follow-up Campaign*

**Step 6: Define the End of the Program**

All programs have defined starting and end points.


1. Click the **End** node.
2. For this example, you can accept the default name of the end point.
3. Tap **Apply**.

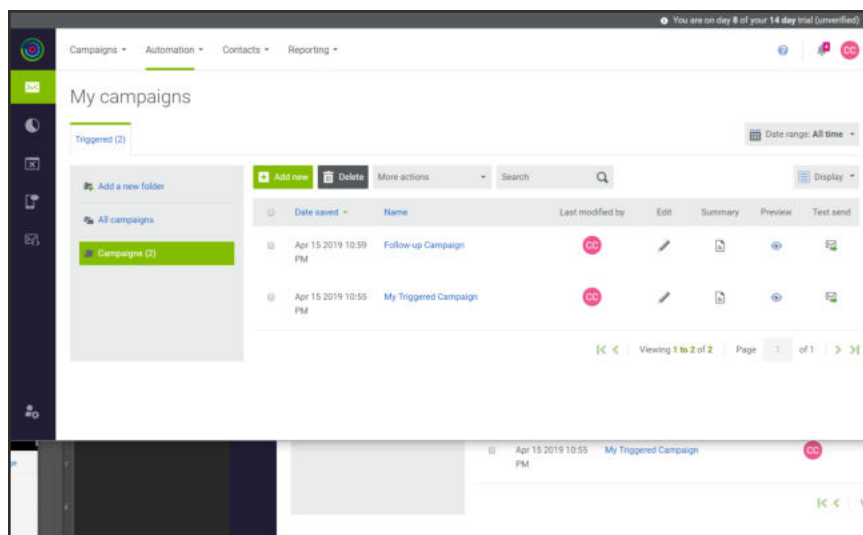


*End Node*

## Step 7: Edit Your Campaign

If you added placeholders for new campaigns, you still need to complete the definition of each campaign. However, if you used existing campaigns, your Welcome program is good to go!

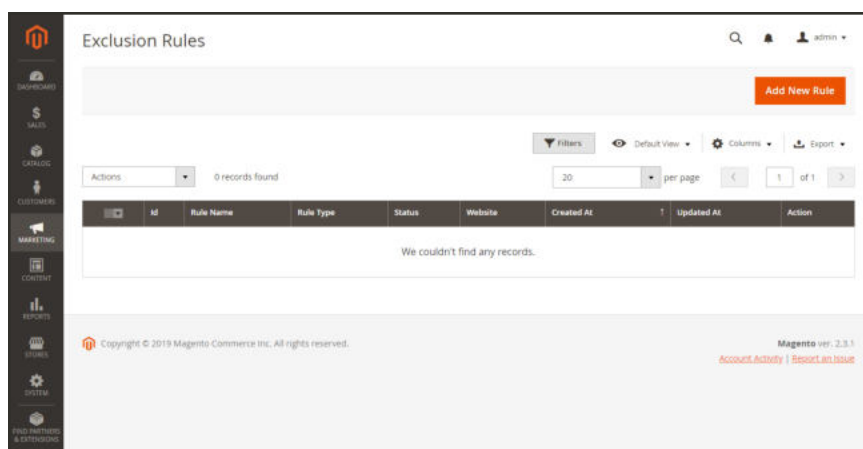
1. On the **Automation** menu, choose **Triggered campaign content**.
2. Find the campaign in the list, and click **Edit** (  ).



*My Campaigns*

## Exclusion Rules

An exclusion rule can be created to exclude abandoned cart and review emails from being sent under certain conditions. A rule describes the conditions that must be met to trigger the action. For example, a rule might exclude all abandoned carts with a subtotal that is equal to, or less than ten.



*Exclusion Rules*

## To add a new rule:

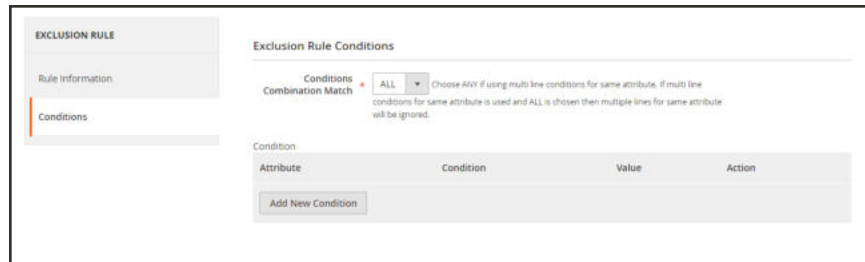
1. On the Admin sidebar, choose **Marketing**. Under **Customer Engagement**, choose **Exclusion Rules**. Then, tap **Add New Rule**.

*Rule Information*

2. On the **Rule Information** tab, do the following:
  - a. Enter a descriptive **Rule Name**.
  - b. Set **Rule Type** to one of the following:
    - Abandoned Cart Exclusion Rule
    - Review Email Exclusion Rule
  - c. Leave **Status** set to “Inactive” for now. You can later change it to “Active.”
  - d. Choose the **Websites** where the rule applies.
3. Before you define the condition, think about what you want the rule to accomplish. Then, describe the condition in terms of attribute values and actions. A rule can be set to meet any or all of the stated condition, and a single rule can have multiple conditions.

On the **Conditions** tab, set **Conditions Combination Match** to one of the following:

- ANY
- ALL




*Exclusion Rule Conditions*



4. Tap **Add New Condition**. Then, do the following:
  - a. Choose the **Attribute** that is the subject of the conditional statement.
  - b. Under **Condition**, choose the operator.
  - c. Enter the **Value** that is needed to complete the condition.

**Exclusion Rule Conditions**

Conditions **Combination Match** \* ALL Choose ANY if using multi line conditions for same attribute. If multi line conditions for same attribute is used and ALL is chosen then multiple lines for same attribute will be ignored.

Attribute	Condition	Value	Action
Payment Metho	Is	Authorize.Net	

Add New Condition

*Add New Condition*

- d. For multiple conditions, tap **Add New Condition**. Then, repeat these steps.
5. When complete, tap **Save**.



## CHAPTER 26:

# Sales Documents

In addition to the email messages related to a sale, your store generates invoices, packing slips, and credit memos in both HTML and PDF formats. Before your store goes live, make sure to update these documents with your logo and store address. You can customize the address format, and also include additional information for reference.

- Invoices
- Packing Slips
- Credit Memos

## Preparing Your Invoice Logo

Unlike the logo images used in HTML, the logo for PDF invoices and other sales documents can be a high-resolution, 300 dot per inch (DPI) image. However, the image must be rendered to fit a space that is 200 pixels wide by 50 pixels high. Be careful to preserve the aspect ratio when you resize the logo. Resize the logo to fit the height, and don't worry about any unused space to the right.

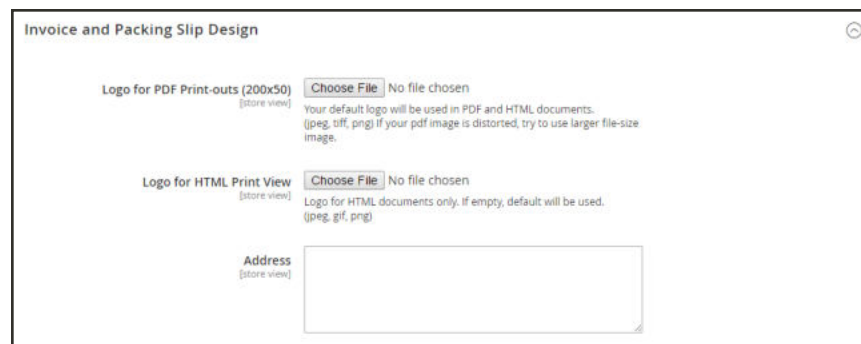


*200 x 50 pixels*

One way to resize your logo to fit the required size is to create a new, blank image with the correct dimensions. Then, paste your logo image and resize it to fit the height. With most image editing programs, you can either scale it by a percentage to preserve the aspect ratio, or hold down the Shift key and manually resize the image.

### To configure invoices and packing slips:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand ☺ the **Invoice and Packing Slip Design** section. Then, do the following:



*Invoice and Packing Slip Design*

- a. To upload the **Logo for PDF Print-outs**, tap **Choose File**. Find the logo that you have prepared, and tap **Open**.
- b. To upload the **Logo for HTML Print View**, tap **Choose File**. Find the logo that you have prepared, and tap **Open**.

4. Enter your address as you want it to appear on invoices and packing slips.
5. When complete, tap **Save Config.**

For reference, a thumbnail of the uploaded image appears before each field. Don't worry if the thumbnail appears distorted. The proportion of the logo will be correct on the invoice.

### To replace an image:

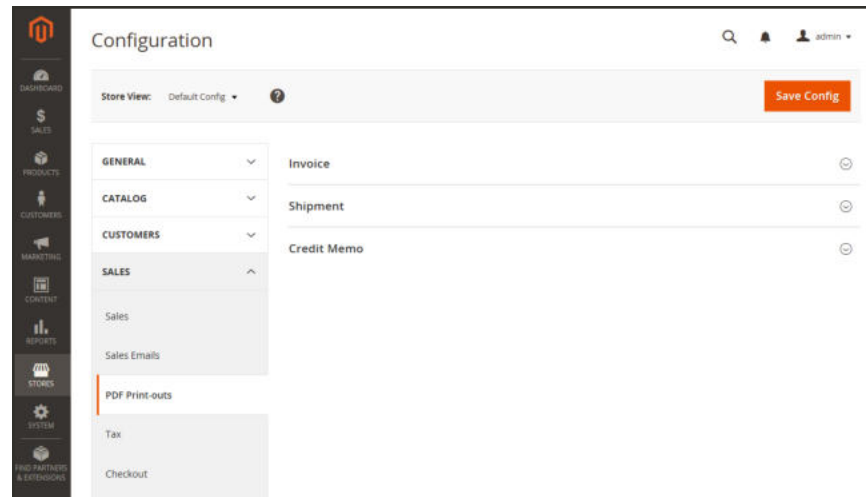
1. Tap **Choose File** and choose a different logo file.
2. Mark the **Delete Image** checkbox for the image you want to replace.
3. Tap **Save Config.**

### Image Formats

FORMAT	REQUIREMENTS
<b>PDF</b>	
File Format	JPG (JPEG), PNG, TIF (TIFF)
Image Size	200 pixels wide x 50 pixels high
Resolution	300 DPI recommended
<b>HTML</b>	
File Format	JPG (JPEG), PNG, GIF
Image Size	Determined by theme.
Resolution	72 or 96 DPI

## Adding Reference IDs to Header

The Order ID and customer IP address can be included in the header of sales documents that accompany an order. By default, both the Order ID and customer IP address appear in the header of invoices, shipment packing slips, and credit memos.



*PDF Print-outs*

### To change the Order ID setting:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **PDF Print-outs**.
3. Expand ☺ the **Invoice** section.

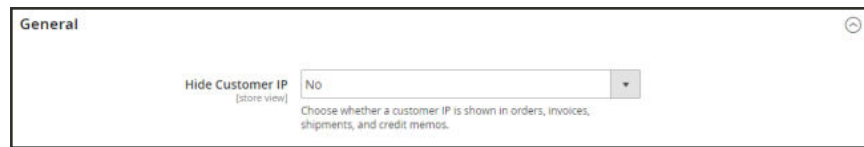


*Invoice*

4. Set **Display Order ID in Header** according to your preference.
5. Repeat for the **Shipment** and **Credit Memo** sections.
6. When complete, tap **Save Config**.

**To change the customer IP address setting:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand ☺ the **General** section.

*General*

4. Set **Hide Customer IP** to your preference.
5. When complete, tap **Save Config**.

## Customer Address Templates

You can modify the template that determines the format of customer billing and shipping addresses that appear on printed invoices, shipments, and refunds, as well as in the address book of the customer account.

### Example 1: Text Templates

#### For Text, Text One Line, HTML and PDF Address Templates

```

{{depend address attribute code}} a space, a character, or UI label
{{/depend}};

{{if address attribute code}}{{var address attribute code}} a space, a
character, or UI label

{{/if}}

```

### Example 2: JavaScript Template

#### For JavaScript Address Template

```
#{address attribute code} or User Interface label #{address attribute code}
```

The screenshot shows the 'Address Templates' configuration interface. It lists four template types, each with a text area for the template code and a checkbox for 'Use system value'.

Template Type	Template Code	Use system value
Text [store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}} {{depend suffix}} {{var suffix}} {{/depend}} {{depend company}}{{var company}} {{/depend}} {{if street1}}{{var street1}} </pre>	<input checked="" type="checkbox"/>
Text One Line [store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}} {{depend suffix}} {{var suffix}} {{/depend}}, {{var street}}, {{var city}}, {{var region}}, {{var postcode}}, {{var country}} </pre>	<input checked="" type="checkbox"/>
HTML [store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}} {{depend suffix}} {{var suffix}} {{/depend}} {{depend firstname}}&lt;br/&gt; {{/depend}} {{depend company}}{{var company}}&lt;br /&gt; </pre>	<input checked="" type="checkbox"/>
PDF [store view]	<pre> {{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}} {{depend suffix}} {{var suffix}} {{/depend}} {{depend company}}{{var company}} {{/depend}} {{if street1}}{{var street1}} </pre>	<input checked="" type="checkbox"/>

### Address Templates

**To change the order of address fields:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Address Templates** section. The section includes a separate set of formatting instructions for each of the following:
  - Text
  - Text One Line
  - HTML
  - PDF
4. Edit each template as needed, using the examples for reference.
5. When complete, tap **Save Config.**







## CHAPTER 27:

# Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento Open Source gives you the ability to publish and distribute newsletters to customers who have subscribed, plus tools to produce your newsletter, build and manage your list of subscribers, develop content, and drive traffic to your store. You can also use [Page Hierarchy](#) to create an archive of past issues.

You can add capabilities by integrating your Magento installation with a third-party newsletter service provider and by adding extensions. To learn more, see [Magento Marketplace](#).

## Configuring Newsletters

The first step in creating newsletters is to configure the newsletter settings for your site. You can require customers to click a confirmation link that is sent by email to confirm the subscription. This **double opt-in**<sup>1</sup>, method requires customers to confirm twice that they want to receive your newsletter, and reduces the possibility that it might be considered to be spam.

### To configure subscription options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Newsletter**.
3. If necessary, expand ☺ the **Subscription Options** section. Then, do the following:

Setting	Value	Use system value
Allow Guest Subscription [store view]	Yes	<input checked="" type="checkbox"/>
Need to Confirm [store view]	No	<input checked="" type="checkbox"/>
Confirmation Email Sender [store view]	Customer Support	<input checked="" type="checkbox"/>
Confirmation Email Template [store view]	Subscription Confirmation (Default) <small>Email template chosen based on theme fallback when "Default" option is selected.</small>	<input checked="" type="checkbox"/>
Success Email Sender [store view]	General Contact	<input checked="" type="checkbox"/>
Success Email Template [store view]	Subscription Success (Default) <small>Email template chosen based on theme fallback when "Default" option is selected.</small>	<input checked="" type="checkbox"/>
Unsubscription Email Sender [store view]	Customer Support	<input checked="" type="checkbox"/>
Unsubscription Email Template [store view]	Unsubscription Success (Default) <small>Email template chosen based on theme fallback when "Default" option is selected.</small>	<input checked="" type="checkbox"/>

### *Subscription Options*

<sup>1</sup>The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

- a. Confirm the email template and sender of the each of the following email messages that are sent to subscribers:
    - Success email
    - Confirmation email
    - Unsubscribe email
  - b. To use the double opt-in process to confirm subscriptions, set **Need to Confirm** to “Yes.”
  - c. To allow people who do not have an account with your store to subscribe to the newsletter, set **Allow Guest Subscription** to “Yes.”
4. When complete, tap **Save Config**.

## Newsletter Templates

You can create as many newsletter templates as you need for different purposes. You might send a weekly product update, a monthly newsletter, or annual holiday newsletter. Newsletter templates can be prepared with HTML markup, or as plain text. Unlike HTML, plain text newsletters contain no images, rich text, or formatted links. In the grid, the Template Type column indicates whether a template is HTML or text.

ID	Template	Added	Updated	Subject	Sender	Template Type	Action
1	Luma Newsletter	Sep 9, 2016, 10:54:49 AM	Sep 9, 2016, 10:54:49 AM	News You Can Use	CustomerSupport (support@example.com)	html	
2	Luma Newsletter	Sep 9, 2016, 2:40:49 PM	Sep 9, 2016, 2:40:49 PM	News You Can Use	CustomerSupport (condra@magento.com)	text	

*Newsletter Templates*

### To create a newsletter template:

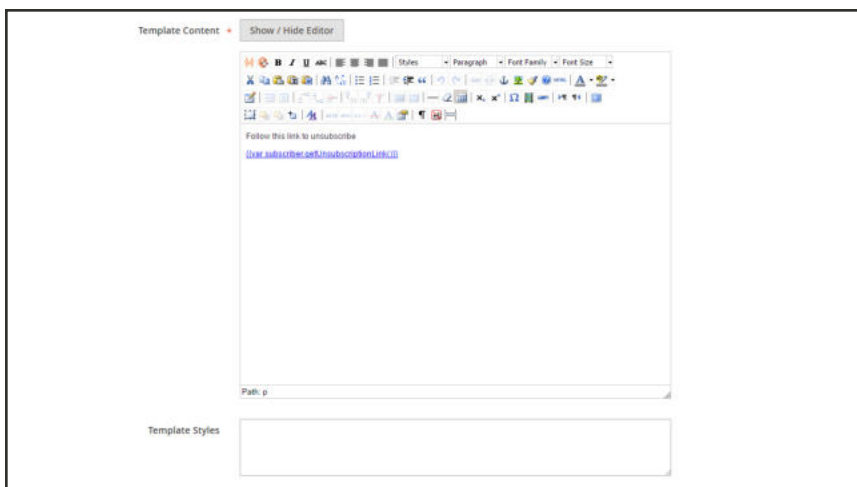
1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Template**.
2. To add a new template, click the **Add New Template** button. Then, do the following:
  - a. In the **Template Name** enter name for internal reference.
  - b. In the **Template Subject** field, describe the purpose of the newsletter.
  - c. In the **Sender Name** field , enter the name of the person who is to appear as the sender of the newsletter.
  - d. In the **Sender Email** field, enter the email address of the newsletter sender.

*Template Information*

- e. At the **Template Content** field, tap **Show / Hide Editor** to display the WYSIWYG editor. Then, update the content as needed. To learn more, see: [Using the Editor](#).

Do not remove the unsubscribe link at the bottom of the template content. In some jurisdictions, the link is required by law.

- f. In the **Template Styles** field, enter the CSS declarations needed to format the content.



*Template Information*

- 3. Tap **Preview Template** to see how it looks. Then, make any changes that are needed.
- 4. When complete, tap **Save Template**.

After you save a template, a **Save As** button appears the next time you edit the template. It can be used to save variations of the template without overwriting the original.

**To convert the template to plain text:**

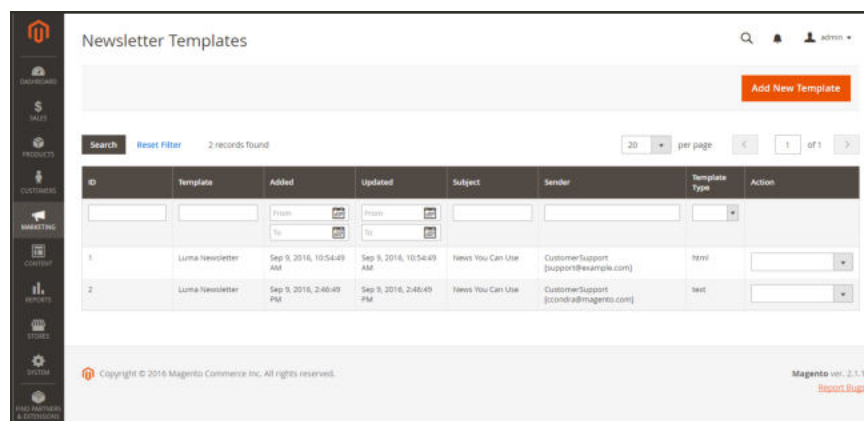
- 1. At the top of the page, tap **Convert to Plain Text**. When prompted to confirm, tap **OK**.
- 2. To preview the plain text version of the template, tap **Preview Template**. The preview opens in a new browser tab.
- 3. To save the plain text version, tap **Save Template**.

**To restore the HTML:**

- 1. At the top of the page, tap **Return HTML Version**.
- 2. To preview the HTML version of the template, tap **Preview Template**. The preview opens in a new browser tab.
- 3. To save the HTML version, tap **Save Template**.


## Sending Newsletters

To manage the load on the server, newsletters with many subscribers are sent in a queue of multiple batches. You can check the newsletter queue periodically to check the status, and see how many have been processed. Any problems that occur during transmission appear on the Newsletter Problem Report.



*Add to Newsletter Queue*

### To send a newsletter:

1. On the Admin menu, tap **Marketing**. Then under **Newsletters**, choose **Newsletter Templates**.
2. In the grid, find the template for the newsletter that is to be sent. Then, set the **Action** column to “Queue Newsletter.”
3. In the **Queue Date Start** field, select the date that the transmission is to begin from the calendar (  ).
4. In the **Subscribers From** list select each store view that is to be included in the email blast.
5. Complete the email header information as follows:
  - a. Enter a brief description of the newsletter for the **Subject** line of the email header.
  - b. Enter the **Sender Name**.
  - c. In the **Sender Email** field, enter the email address of the sender.

The default name and email address of the sender is specified in the configuration.

*Queue Information*

6. If applicable, enter a note in the **Message** box above the instructions to unsubscribe. Do not remove the instructions, which are required by law in many jurisdictions.
7. When complete, tap **Save and Resume**.

The newsletter appears in the queue waiting to be processed.

ID	Queue Start	Queue End	Subject	Status	Processed	Recipients	Action
1	Sep 8, 2016, 10:04:25 AM	---	News You Can Use	Not Sent	0	0	

*Newsletter Queue*

**To check for problems:**

1. On the Admin menu, tap **Reports**.
2. Under **Marketing**, choose **Newsletter Problem Reports**.



## Managing Subscribers

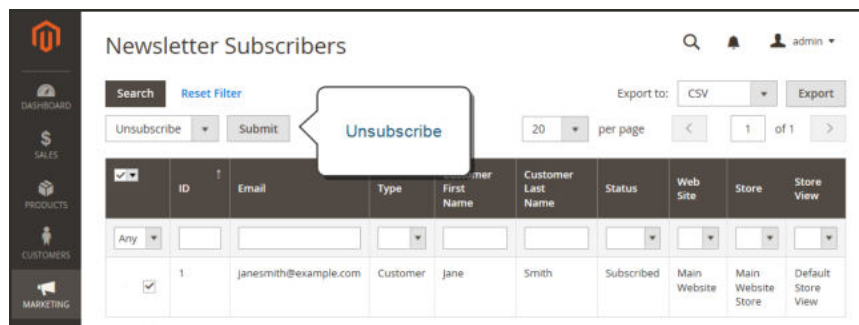
As a best practice you should manage your subscription list on a regular basis, and make sure to process any requests to unsubscribe. In some jurisdictions, it is required by law that requests to unsubscribe are processed within a specific period of time.

If you want to use a third-party service to send newsletters, you can export your subscription list as a CSV or XML file.

### To cancel a subscription:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Subscribers**.
2. Find the subscriber in the grid. Then, mark the checkbox in the first column.
3. Set the **Action** control to “Unsubscribe.” Then, tap **Submit**.

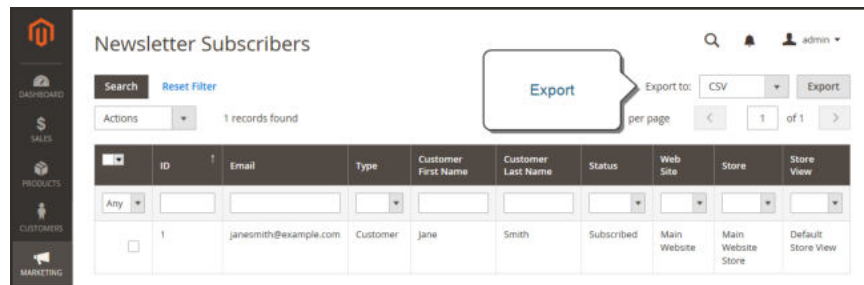
The status of the record changes to “Unsubscribed.”



*Unsubscribe*

**To export the list of subscribers:**

1. From the Newsletter Subscribers list, use the filter controls to include only records with a **Status** of “Subscribed,” and for the appropriate website, store, or store view.
2. Set the **Export to** control to one of the following:
  - CSV
  - XML
3. Tap **Export**. Then, look for the prompt at the bottom of the screen, and save the file.



*Export Newsletter Subscribers*



## CHAPTER 28:

# RSS Feeds

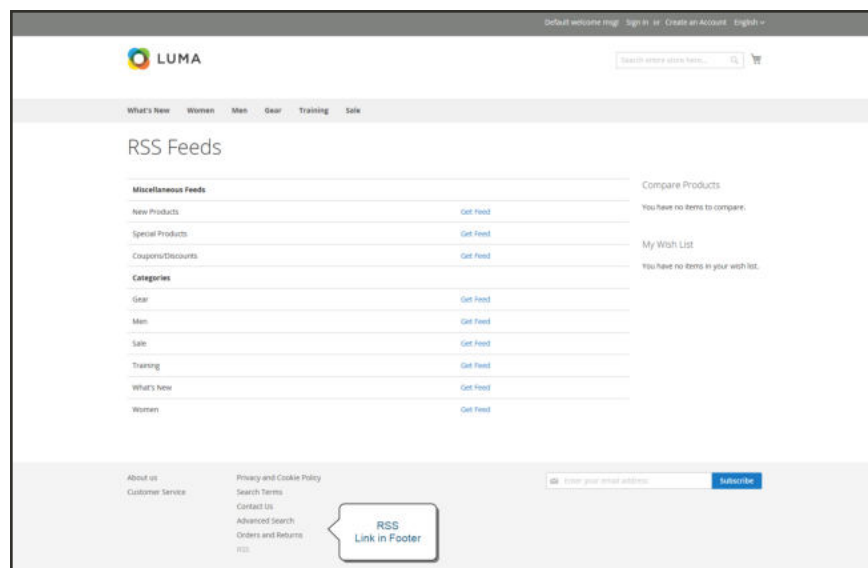
RSS (Really Simple Syndication) is an XML-based data format that is used to distribute information online. Your customers can subscribe to your RSS feeds to learn of new products and promotions. RSS Feeds can also be used to publish your product information to shopping aggregation sites, and can be included in newsletters.

When RSS feeds are enabled, any additions to products, specials, categories, and coupons are automatically sent to the subscribers of each feed. A link to all RSS feeds that you publish is in the footer of your store.



The orange RSS symbol is typically used to identify an RSS feed.

The software that is required to read an RSS feed is called a **feed reader**<sup>1</sup>, and allows people to subscribe to headlines, blogs, podcasts, and much more. Google Reader is one of the many feed readers that are available online for free.



*RSS Feeds*

<sup>1</sup>Software that is used to read syndicated content from RSS feeds.

### To set up RSS feeds for your store:

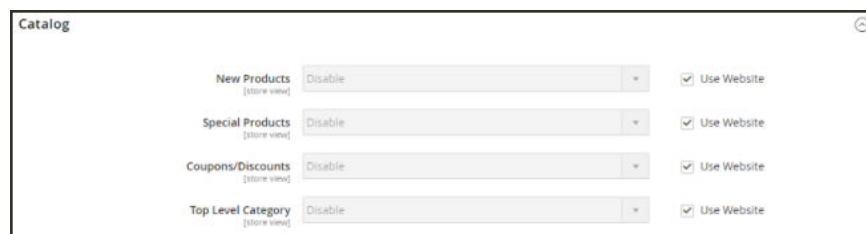
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the view(s) where the feeds are to be available. If prompted to confirm, tap **OK**.
3. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
4. Expand ☑ the **Rss Config** section. Then, set **Enable RSS** to “Enable.”

If necessary, clear the **Use Website** checkbox to change the default value.



*RSS Feeds*

5. Expand ☑ the **Wish List** section. Then, set **Enable RSS** to “Enable.”
6. Expand ☑ the **Catalog** section and set other feeds to “Enable” as needed.
  - New Products
  - Special Products
  - Coupons/Discounts
  - Top Level Category



*Catalog*

7. Expand ☑ the **Order** section. Then, set **Customer Order Status Notification** to “Enable.”
8. When complete, tap **Save Config**.

## Types of RSS Feeds

RSS FEED	DESCRIPTION
Wish List	When enabled, an RSS feed link appears at the top of customer wish list pages. Additionally, the wish list sharing page includes a checkbox that lets you include a link to the feed from shared wish lists.
New Products	Publishes notification of new products added to the catalog.
Special Products	Publishes notification of any products with special pricing.
Coupons / Discounts	Publishes notification of any special coupons or discounts that are available in the store.
Top Level Category	Publishes notification of any change to the top-level category structure of your catalog, which is reflected in the main menu.
Customer Order Status	Gives customers the ability to track their order status by RSS feed. When enabled, an RSS feed link appears on the order.





## CHAPTER 29:

# Using Variables

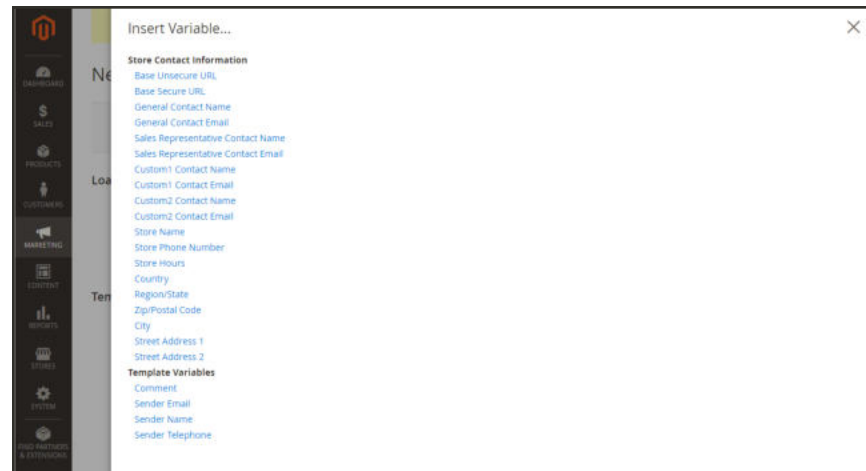
Variables are pieces of information that can be created once and used in multiple places, such as email templates, blocks, and content pages. Your store includes a large number of predefined variables that can be used to personalize communications. In addition, you can create your own custom variables.

- Predefined Variables
- Custom Variables



## Adding Predefined Variables

Predefined variables are easy to add to content email templates and content pages to personalize communications. The selection of available variables depends on the template.



*Variables for Contact Form Template*

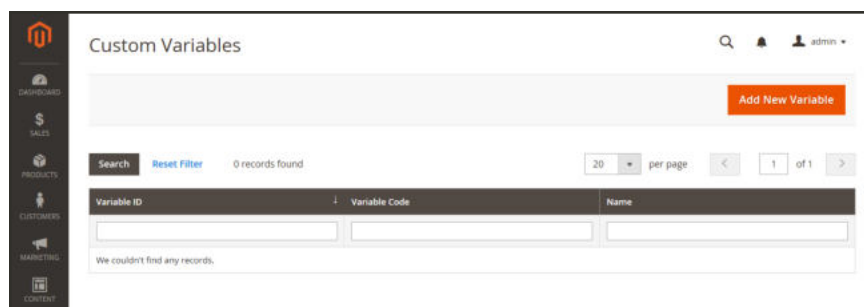
### To add a variable to an email template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Do one of the following:
  - Load an existing template.
  - Add a new template.
3. In the **Template Content** box, position the insertion point where you want the variable to appear. Then, tap **Insert Variable**.
4. In the list of available variables, choose the one you want to insert into the template.
5. To preview the template in a new browser window, tap **Preview**. Then, return to the main window.
6. When complete, tap **Save Template**.

## Adding Custom Variables

If you know a little basic HTML, you can create custom variables and use a **markup tag** to incorporate them into pages, blocks, banners, and email templates.

```
{{CustomVar code= "my_custom_variable"}}
```

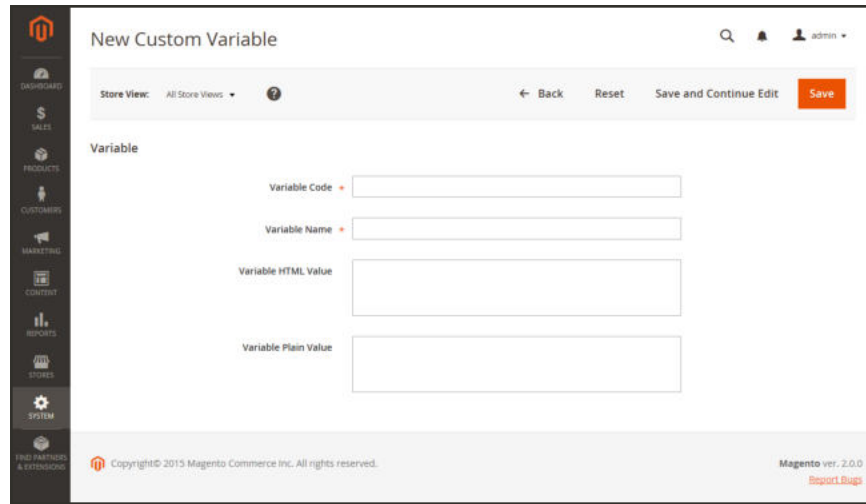


*Custom Variables*

### To create a custom variable:

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Custom Variables**.
2. Tap **Add New Variable**.
3. Enter an identifier in the **Variable Code** field. Use all lowercase characters, without spaces.
4. Enter a **Variable Name**, which is used for internal reference. Then, do one of the following:
  - In the **Variable HTML Value** text field, enter any content you want to include, using basic HTML tags. This option allows you to format the value.
  - In the **Variable Plain Value** field, enter the variable value as plain text.

You can drag the lower-right corner to make the boxes bigger.



*New Custom Variable*

5. When complete, tap **Save**.

## Markup Tags

A `markup` tag is a directive that contains snippet of code with a relative reference to an object in your store, such as a variable, URL, image, or block. Markup tags can be used anywhere the editor is available and incorporated into the HTML of content pages, blocks, email templates, newsletters, and so on.

Markup tags are enclosed in double, curly braces, and can either be generated by the Widget tool, or typed directly into HTML content. For example, rather than hard-coding the full path to a page, you can use a markup tag to represent the store URL. The markup tags featured in the following examples include:

Inserting many directives, especially widgets like the Recently Viewed / Compared Products type, can produce a negative effect on the first page load when the page is not cached. For this reason, we advise that you use them with caution. In most cases, it should not create an issue. But this is something that you should discuss with your development team.

### Custom Variable

The Variable markup tag can be used to insert a **custom variable** into an email templates, blocks, newsletters, and content pages,

```
{{CustomVar code= "my_custom_variable"}}
```

### Store URL

The Store URL markup tag represents the base URL of your website, and is used as a substitute for the first part of a full URL, including the domain name. There are two versions of this markup tag: One that goes directly to your store, and the other with a forward slash at the end that is used when a path is added.

```
{{store url='apparel/shoes/womens'}}
```

### Media URL

The dynamic media URL markup tag represents the location and file name of an image that is stored on a content delivery network (CDN). The tag can be used to place an image on a page, block, banner, or email template.

```
{{media url='shoe-sale.jpg'}}
```

## Block ID

The Block ID markup tag is one of the easiest to use, and can be used to place a block directly on a CMS page, or even nested inside another block. You can use this technique to modify a block for different promotions or languages. The Block ID markup tag references a block by its identifier.

```
{{block id='block-id'}}
```

## Template Tag

A template tag references a PHTML template file, and can be used to display the block on a CMS page or static block. The code in the following example can be added to a page or block to display the Contact Us form.

### “Contact Us” Template Tag

```
{{block class="Magento\Contact\Block>ContactForm"
name="contactForm" template="Magento_Contact::form.phtml"}}
```

The code in the next example can be added to a page or block to display the a list of products in a specific category, by category ID.

### “Category Product List” Template Tag

```
{{block type="catalog/product_list" category_id="22"
template="catalog/product/list.phtml"}}
```

## Widget Code

The Widget tool can be used to display lists of products, or to insert complex links, such as one that goes to a specific product page, based on product ID. The code that is generated includes the block reference, location of the code module, and corresponding PHTML template. After the code is generated, you can copy and paste it from one place to another.

The code in the following example can be added to a page or block to display the list of new products.

### “New Products Grid” Code

```
{widget type="catalog/product_widget_new"
display_type="new_products" products_count="10"
template="catalog/product/widget/new/content/new_grid.phtml"}}
```

The code in the next example can be added to a page or block to display a link to a specific product, by product ID.

### “Link to Product” Code

```
{widget type="catalog/product_widget_link" anchor_text="My Product Link"
title="My Product Link" template="catalog/product/widget/link/link_
block.phtml"
id_path="product/31"}}
```

## Using Markup Tags in Links

You can use markup tags with HTML anchor tags, and link directly to any page in your store. The link can be incorporated into content pages, blocks, banners, or email and newsletter templates. You can also use this technique to link an image to a specific page.

**Process Overview:**

Step 1: **Identify the Destination URL**

Step 2: **Add the Markup to the URL**

Step 3: **Complete the Anchor Tag**

### Step 1: Identify the Destination URL

If possible, navigate to the page that you want to link to, and copy the full URL from the address bar of your browser. The part of the URL that you need comes after the “dot com forward slash.” Otherwise, copy the URL Key from the CMS page that you want to use as the link destination.

**Full URL to Category Page**

```
http://mystore.com/apparel/shoes/womens
```

```
http://mystore.com/apparel/shoes/womens.html
```

**Full URL to Product Page**

```
http://mystore.com/apparel/shoes/womens/nine-west-pump
```

```
http://mystore.com/apparel/shoes/womens/nine-west-pump.html
```

**Full URL to CMS Page**

```
http://mystore.com/about-us
```

## Step 2: Add the Markup to the URL

The Store URL tag represents the base URL of your website, and is used as a substitute for the “http address” part of the store URL, including the domain name and “dot com.” There are two versions of the tag, which you can use, depending on the results you want to achieve.

<code>store direct_url</code>	Links directly to a page.
<code>store url</code>	Places a forward slash at the end, so additional references can be appended as a path.

In the following examples, the URL Key is enclosed in single quotes, and the entire markup tag is enclosed in double curly braces. When used with an anchor tag, the markup tag is placed inside the double quotes of the anchor. To avoid confusion, you can alternate using single-and double quotes for each nested set of quotes.

1. If you are starting with a full URL, delete the “http address” part of the URL, up through and including the “dot.com forward slash.” In its place, type the Store URL markup tag, up through the opening single quote.

### Store URL Markup Tag

```
http://mystore.com/apparel/shoes/womens  
{{store url='apparel/shoes/womens'}}
```

Otherwise, type the first part of the Store URL markup tag, and paste the URL key or path that you copied earlier.

### Store URL Markup Tag with URL Key

```
{{store url='  
{{store url='apparel/shoes/womens'}}
```

2. To complete the markup tag, type the closing double quotes and double braces.



### Step 3: Complete the Anchor Tag

1. Wrap the completed markup tag inside an anchor tag, using the markup tag instead of the target URL. Then, add the link text, and closing anchor tag.

#### Markup in Anchor Tag

```
<a href="{{markup tag goes here}}">Link Text</a>
```

2. Paste the completed anchor tag into the code of any CMS page, block, banner, or email template, where you want the link to appear.

#### Complete Link with Markup

```
<a href="{{store url='apparel/shoes'}}">Shoe Sale</a>
```

## Dynamic Media URLs

A dynamic media URL is a relative reference to an image or other media asset. When enabled, dynamic media URLs can be used to link directly to assets on your server, or to files stored on a **content delivery network**. The use of dynamic media URLs can impact catalog performance, and the **editor** can be configured to use either static or dynamic media URLs.

As with all **markup tags**, the directive is enclosed in double curly braces. The format of a dynamic media URL looks like this:

```
{{media url="path/to/image.jpg"}}
```

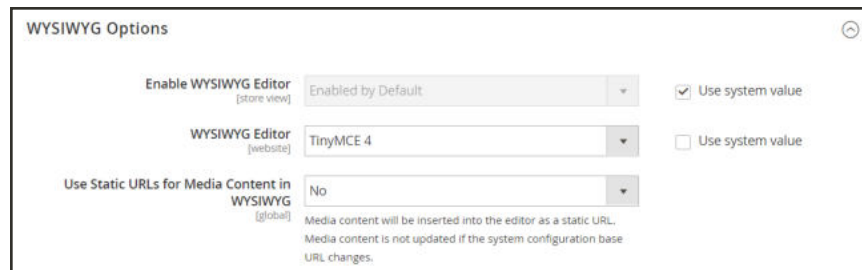
Dynamic URL directives are processed from saved HTML content when the page is rendered on the storefront. Each time the page is rendered, the content is scanned for `{{media url="..."}}`, and replaces the directive with the corresponding media URL.

Inserting many directives, especially widgets like the Recently Viewed / Compared Products type, can produce a negative effect on the first page load when the page is not cached. For this reason, we advise that you use them with caution. In most cases, it should not create an issue. But this is something that you should discuss with your development team.

### To configure static media URLs:

By default, images inserted into the catalog from the WYSIWYG editor have relative, dynamic URLs. If you prefer to use a static URL, you can change the configuration setting.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Content Management**.
3. Expand ☺ the **WYSIWYG Options** section.



### *WYSIWYG Options*

4. Set **Use Static URLs for Media Content in WYSIWYG** to one of the following:

- |     |   |
|-----|---|
| Yes | Uses static URLs for media content that is inserted with the WYSIWYG editor. Static URLs are absolute, and break if the <b>base URL</b> of the store changes.   |
| No  | (Default) Uses dynamic URLs for media content that is inserted with the WYSIWYG editor, based on the <code>{{media url="..."}}</code> directive. Dynamic URLs are relative, and do not break if the <b>base URL</b> of the store changes. |
5. When complete, tap **Save Config**.

## Variable Reference

Most email templates have a section of additional variables that are specific to the template. The following are examples of some frequently used templates.

### Email Template Variables

VARIABLE	MARKUP TAG
Email Footer Template	<code>{{template config_path="design/email/footer_template"}}</code>
Email Header Template	<code>{{template config_path="design/email/header_template"}}</code>
Email Logo Image Alt	<code>{{var logo_alt}}</code>
Email Logo Image URL	<code>{{var logo_url}}</code>
Email Logo Image Height	<code>{{var logo_height}}</code>
Email Logo Image Width	<code>{{var logo_width}}</code>
Template CSS	<code>{{var template_styles raw}}</code>

### Store Contact Information Variables

VARIABLE	MARKUP TAG
Base Unsecure URL	<code>{{config path="web/unsecure/base_url"}}</code>
Base Secure URL	<code>{{config path="web/secure/base_url"}}</code>
General Contact Name	<code>{{config path="trans_email/ident_general/name"}}</code>
General Contact Email	<code>{{config path="trans_email/ident_general/email"}}</code>
Sales Representative Contact Name	<code>{{config path="trans_email/ident_sales/name"}}</code>
Sales Representative Contact Email	<code>{{config path="trans_email/ident_sales/email"}}</code>
Custom1 Contact Name	<code>{{config path="trans_email/ident_custom1/name"}}</code>
Custom1 Contact Email	<code>{{config path="trans_email/ident_custom1/email"}}</code>

**Store Contact Information Variables (cont.)**

VARIABLE	MARKUP TAG
Custom2 Contact Name	{{config path="trans_email/ident_custom2/name"}}
Custom2 Contact Email	{{config path="trans_email/ident_custom2/email"}}
Store Name	{{config path="general/store_information/name"}}
Store Phone Telephone	{{config path="general/store_information/phone"}}
Store Hours	{{config path="general/store_information/hours"}}
Country	{{config path="general/store_information/country_id"}}
Region/State	{{config path="general/store_information/region_id"}}
Zip/Postal Code	{{config path="general/store_information/postcode"}}
City	{{config path="general/store_information/city"}}
Street Address 1	{{config path="general/store_information/street_line1"}}
Street Address 2	{{config path="general/store_information/street_line2"}}
Store Contact Address	{{config path="general/store_information/address"}}

### New Account Template Variables

VARIABLE	MARKUP TAG
Customer Account URL	<code>{{var this.getUrl(\$store, 'customer/account/')}}</code>
Customer Email	<code>{{var customer.email}}</code>
Customer Name	<code>{{var customer.name}}</code>

### New Order Template Variables

VARIABLE	MARKUP TAG
Billing Address	<code>{{var formattedBillingAddress raw}}</code>
Email Order Note	<code>{{var order.getEmailCustomerNote()}}</code>
Order ID	<code>{{var order.increment_id}}</code>
Order Items Grid	<code>{{layout handle="sales_email_order_items" order=\$order area="frontend"}}</code>
Payment Details	<code>{{var payment_html raw}}</code>
Shipping Address	<code>{{var formattedShippingAddress raw}}</code>
Shipping Description	<code>{{var order.getShippingDescription()}}</code>





## CHAPTER 30:

# Social

Your Magento store can be connected to social networks either by using the Magento Social Facebook connector, or by installing a Marketplace extension. In addition, you can easily add social plugins such as the “Like” button to CMS blocks that can be incorporated into pages throughout your store.

- [Marketplace Extensions](#)
- [Adding Social Plugins](#)



## Connect to Facebook

Magento Commerce has removed the "Magento Social" Facebook integration, and no longer supports the extension.

Magento Social is an **integration** that establishes a connection between your store and your Facebook account, and creates a shopping page with products from your catalog. When shoppers click a product on your Facebook page, they are redirected to the corresponding product page in your Magento store. All transactions take place from your Magento store.

# SEO & Search

## Contents

In this section of the guide, we'll take a look at the search capabilities of your store, what you can learn from customer search terms, and how to make your products easy to find. Finally, you'll learn best practices and techniques that you can use to bring more traffic to your store.

### Catalog Navigation

- Top Navigation
- Breadcrumb Trail
- Product Listings
- Pagination Controls
- Layered Navigation

### Catalog Search

- Quick Search
- Advanced Search
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- Weighted Search
- Configuring Catalog Search
  - MySQL
  - Elasticsearch
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### Meta Data

- Canonical Meta Tag
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  - Creating URL Rewrites

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- Popular Search Terms
- Adding Search Terms
- Search Terms Report
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### Google Tools

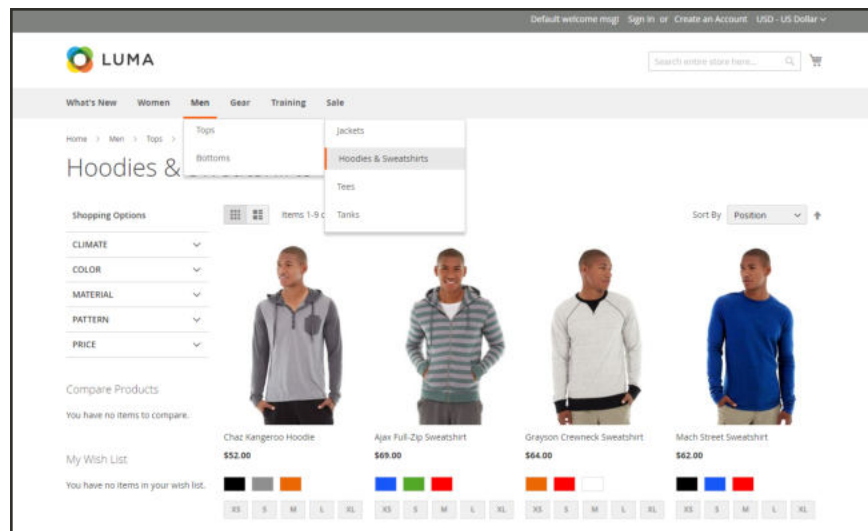
- Google Analytics
- Google Adwords

## CHAPTER 31:

# Catalog Navigation

The term **navigation**<sup>1</sup> refers to the methods shoppers use to move from page to page throughout your store. The main menu, or top navigation of your store is actually a list of category links, and provides easy access to the products in your catalog. You will also find categories in the breadcrumb trail that runs across the top of most pages, and in the layered navigation that appears on the left side of some two- or three-column pages. To learn more about category display options, see: [Display Settings](#).

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

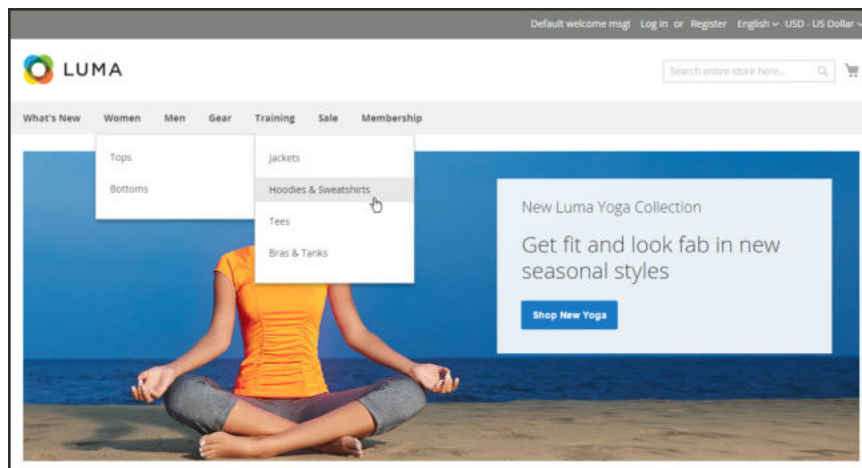


*Catalog Navigation*

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

## Top Navigation

The main menu of your store is like a directory to the different departments in your store. Each option represents a different category of products. The position and presentation of the top navigation might vary by theme, but the way it works is essentially the same.



*Top Navigation*

The category structure of your catalog can influence how well your site is indexed by search engines. The more deeply nested a category, the less likely it is to be thoroughly indexed. As a general rule, anywhere between one and three visible levels is considered to be the most effective. The **root category** counts as the first level, although it doesn't appear in the menu. The maximum number of levels that are available in the top navigation is determined by the configuration. In addition, there might be a limit to the number of menu levels that are supported by your store theme. For example, the sample Luma theme supports up to five levels, including the root.

### Counting Menu Levels

- |         |   |
|---------|---|
| Level 1 | The first level is the <b>root category</b> , which in the sample data is named “Default Category.” The root is a container for the menu, and its name does not appear as an option in the menu.  |
| Level 2 | On a desktop display, the top navigation is the main menu that appears across the top of the page. On a mobile device, the main menu typically appears as a fly-out menu of options. The second-level options in the Luma store are “What's New,” “Women,” “Men,” “Gear,” “Training,” and “Sale.” |
| Level 3 | The third-level appears below each main menu option. For example, under “Women,” the third-level options are “Tops” and “Bottoms.”  |
| Level 4 | The fourth-level options are subcategories that fly out from a third-level option. For example, under “Tops,” the fourth level menu options are “Jackets,” “Hoodies & Sweatshirts,” “Tees,” and “Bras & Tanks.”   |

### To set the top navigation:

See “[Creating Categories](#)” to define the category structure of the main menu. For a multistore installation, a different main menu can be assigned as the **root category** for each **store**.

### To set the depth of the top navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, expand **Catalog**. Then, choose **Catalog**.
3. Expand the **Category Top Navigation** section.

Because the depth of the top navigation has a global **configuration scope**, the setting applies to all websites, stores, and store views in the Magento installation. The Category Top Navigation configuration section is available only when Store View in the upper-left corner is set to “Default Config.”



*Default Config*

4. To limit the number of subcategories that appear in the top navigation, enter the number in the **Maximal Depth** field.

The default Maximal Depth value is zero, which does not place a limit on the number of subcategory levels.

5. When complete, tap **Save Config**.

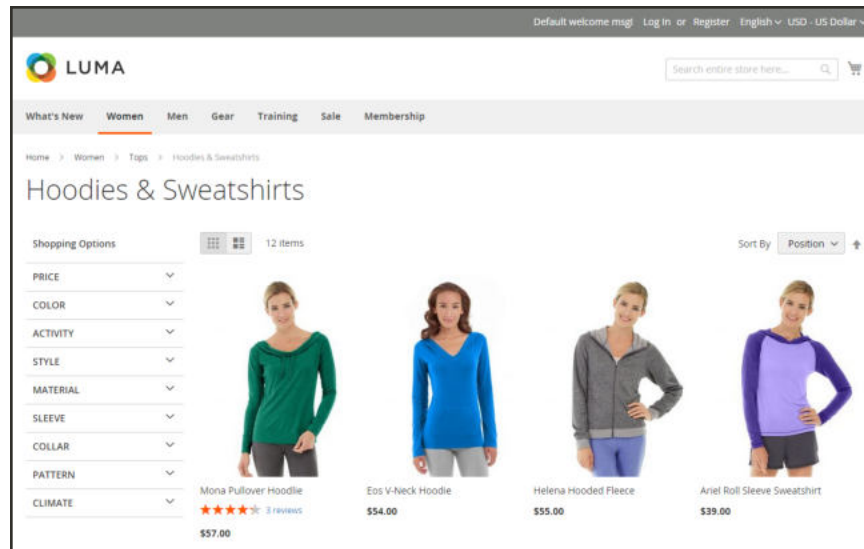


*Category Top Navigation*

## Breadcrumb Trail

A breadcrumb trail is a set of links that shows where you are in relation to other pages in the store. You can click any link in the breadcrumb trail to return to the previous page.

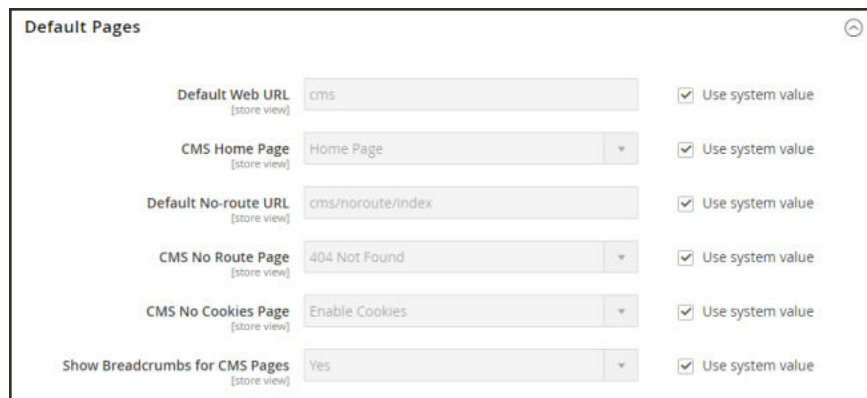
The breadcrumb trail can be configured to appear on content pages, as well as catalog pages. The format and position of the breadcrumb trail varies by theme, but it is usually located just below the header. By default, the breadcrumb trail appears on CMS pages.



*Breadcrumb Trail*

**To remove the breadcrumbs from CMS pages:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**. Then, do the following:
  - a. Expand the **Default Pages** section.
  - b. Clear the **Use system value** checkbox.
  - c. Set **Show Breadcrumbs for CMS Pages** to "No."
3. When complete, tap **Save Config**.



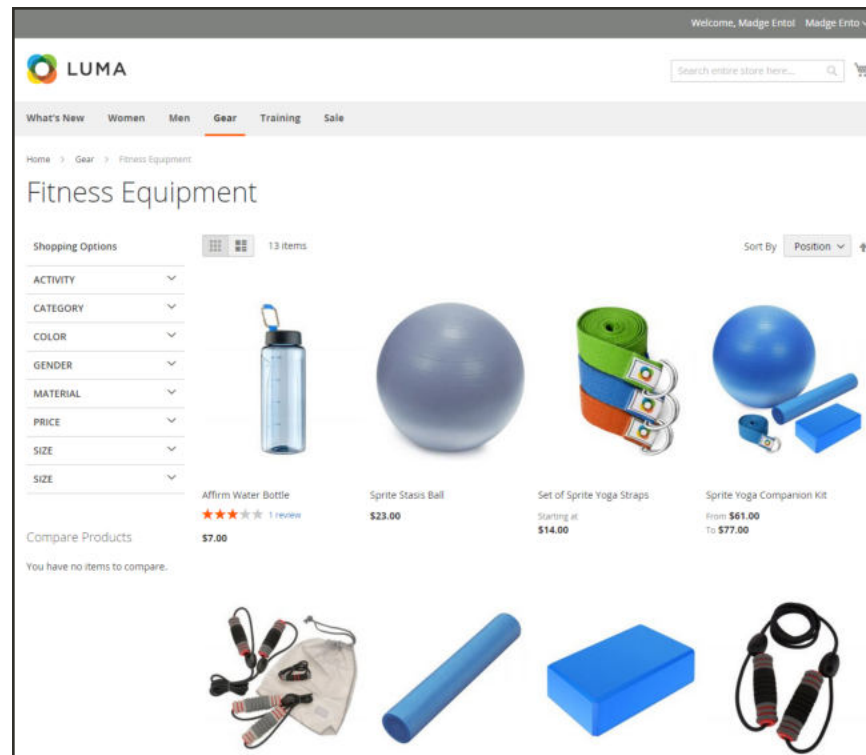
Field	Value	Use system value
Default Web URL [store view]	cms	<input checked="" type="checkbox"/>
CMS Home Page [store view]	Home Page	<input checked="" type="checkbox"/>
Default No-route URL [store view]	cms/noroute/index	<input checked="" type="checkbox"/>
CMS No Route Page [store view]	404 Not Found	<input checked="" type="checkbox"/>
CMS No Cookies Page [store view]	Enable Cookies	<input checked="" type="checkbox"/>
Show Breadcrumbs for CMS Pages [store view]	Yes	<input checked="" type="checkbox"/>

*Show Breadcrumbs for CMS Pages*



## Product Listings

Product listings can be set to appear by default as either a list or grid. You can also determine how many products appear per page, and which attribute is used to sort the list. Each catalog page with a product list has a set of controls that can be used to sort the products, change the format of the list, sort by attribute, and advance from one page to the next.



*Products Displayed as a Grid*

### To configure product listings:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Scroll down and in the panel on the left, tap **Catalog**. Then choose **Catalog**.
3. Expand ☺ the **Storefront** section, and do the following:

The screenshot shows the 'Storefront' configuration panel with the following settings:

- List Mode** (store view): Grid (default) / List.  Use system value
- Products per Page on Grid Allowed Values** (store view): 9,15,30.  Use system value. Comma-separated.
- Products per Page on Grid Default Value** (store view): 9.  Use system value. Must be in the allowed values list.
- Products per Page on List Allowed Values** (store view): 5,10,15,20,25.  Use system value. Comma-separated.
- Products per Page on List Default Value** (store view): 10.  Use system value. Must be in the allowed values list.
- Product Listing Sort by** (store view): Position.  Use system value
- Allow All Products per Page** (store view): No.  Use system value. Whether to show "All" option in the "Show X Per Page" dropdown.
- Use Flat Catalog Category** (global): No.  Use system value
- Use Flat Catalog Product** (global): No.  Use system value
- Swatches per Product** (store view): 16.  Use system value
- Show Swatches in Product List** (store view): Yes.  Use system value

### Storefront

- a. Set the default **List Mode** to one of the following:
  - Grid Only
  - List Only
  - Grid (default) / List
  - List (default) / Grid
- b. In the **Products per Page on Grid Allowed Values** field, enter the number of products that you want to appear per page when shown in grid format. To enter a selection of values, separate each number by a comma.
- c. In the **Products per Page on Grid Default Value** field, enter the default number of products to appear in the grid per page.

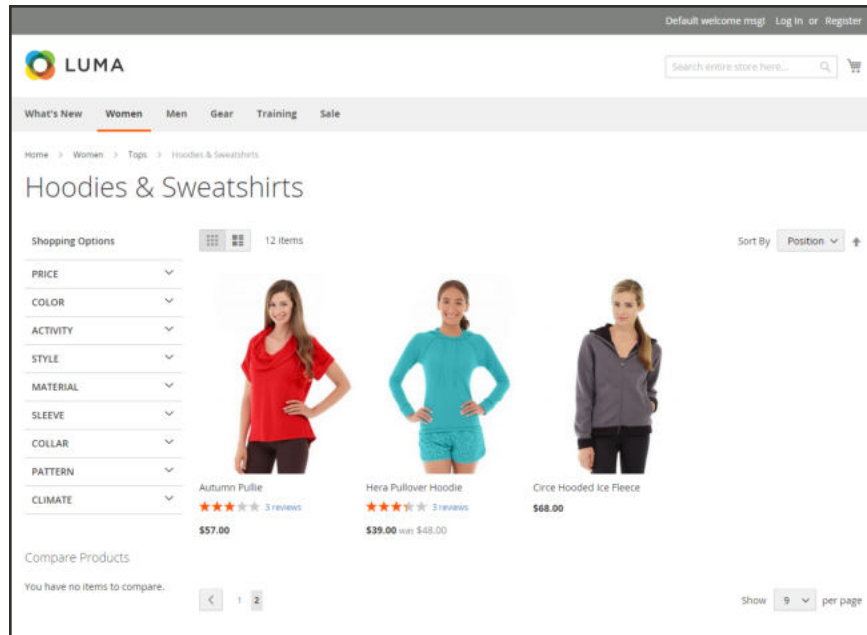
- d. In the **Products per Page on List Allowed Values** field, enter the number of products that you want to appear per page when shown in list format. To enter a selection of values, separate each number by a comma.
  - e. In the **Products per page on List Default Value** field, enter the default number of products that appear in the list, per page.
  - f. To give customers the option to list all products, set **Allow All Products on Page** to “Yes.”
  - g. Set **Product Listing Sorted** by to the default attribute that is initially used to sort the list.
4. If using a **flat catalog**, do the following:
    - a. To display a flat category listing of products, set **Use Flat Catalog Category** to “Yes.”
    - b. To display a flat product listing, set **Use Flat Catalog Product** to “Yes.”
  5. If you want to allow dynamic references for media assets in category and product URLs, set **Allow Dynamic Media URLs in Products and Categories** to “Yes.”
  6. When complete, tap **Save Config**.

### Page Controls

CONTROL	DESCRIPTION
View As	Displays the products in either a grid or list format.
Sort By	Changes the sort order of the list.
Show Per Page	Determines how many products appear per page.
Pagination Links	Navigation links to other pages.

# Pagination Controls

The Pagination settings appear at the top and bottom of the list, and control the format of the pagination links for product listings. You can set the number of links that appear in the control, and configure the Next and Previous links. For the pagination links to appear, there must be more products in the list than are allowed per page in the product list configuration.



*Pagination Controls*

## Pagination Controls



### View As

Displays the list in either a Grid or List format.



### Sort By

Changes the sort order of the list. The “Used for Sorting in Product Listing” storefront property determines which **product attributes** can be used to sort the list.



### Show Per Page


Determines how many products appear per page.

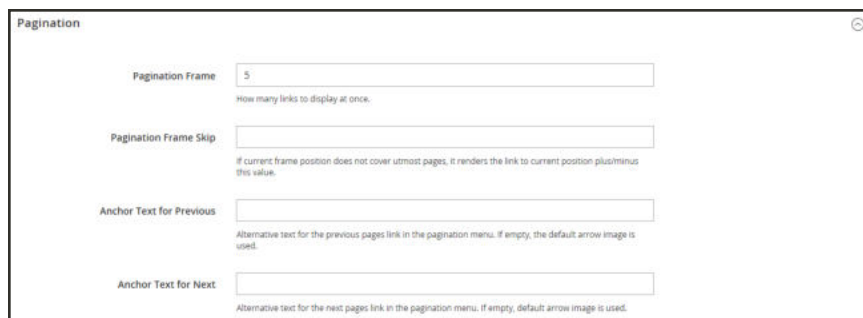


### Pagination Links

Navigation links to other pages.

### To configure the pagination controls:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Pagination** section.

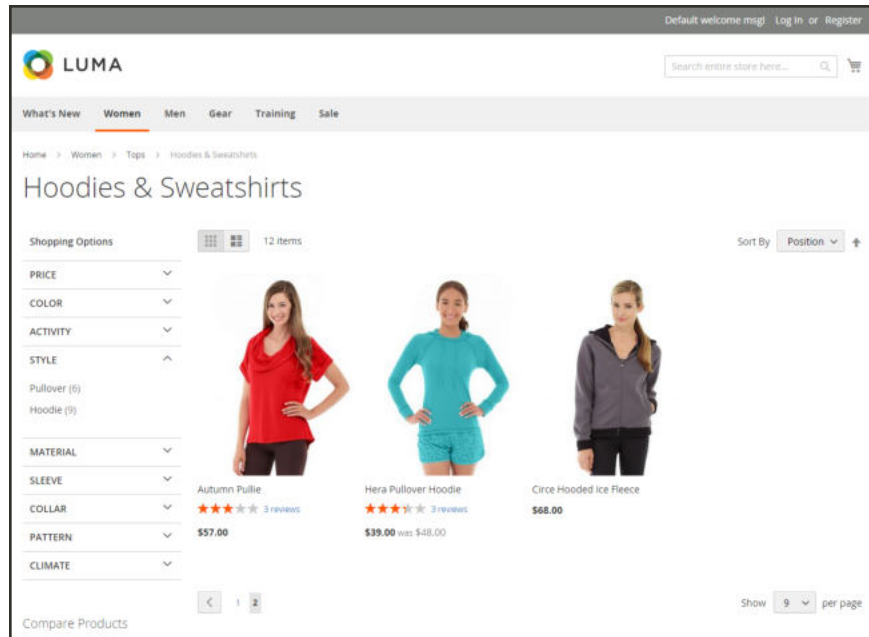


### Pagination

- a. In the **Pagination Frame** field, enter the number of links that you want to appear in the pagination control.
  - b. In the **Pagination Frame Skip** field, enter the number of links that you want to skip ahead before displaying the next set of links in the pagination control.  
  
For example, if the pagination frame has five links, and you want to jump to the next five links, how many links do you want to skip ahead? If you set this to four, then the last link from the previous set will be the first link in the next set.
  - c. In the **Anchor Text for Previous** field, enter the text that you want to appear for the Previous link. Leave blank to use the default arrow.
  - d. In the **Anchor Text for Next** field, enter the text that you want to appear for the Next link. Leave blank to use the default arrow.
4. When complete, tap **Save Config**.

## Layered Navigation

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

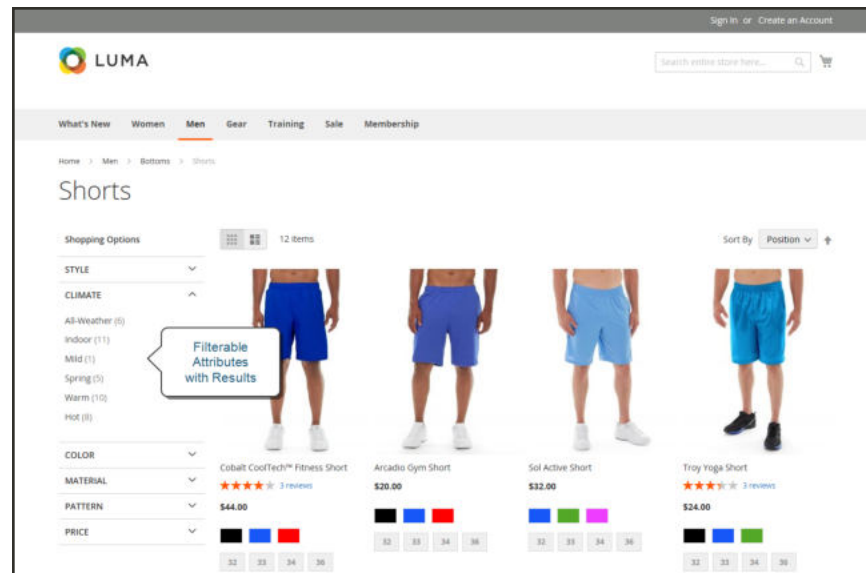


*Layered Navigation by Category and Price*

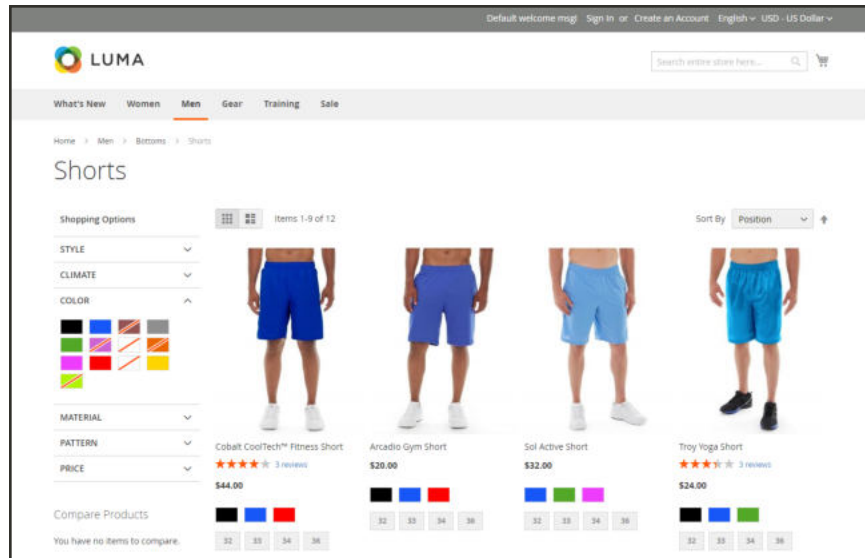
## Filterable Attributes

Layered navigation allows customers to search and browse products using facets by category or by attribute. For example, when a shopper chooses the Mens/Shorts category from the top navigation, the initial results include all products in the category. The list can be filtered further by choosing a specific style, climate, color, material, pattern, or price—or a combination of values. Filterable attributes appear in an expanding section that lists each attribute value. As an option, the list of products with matching results can be configured to include products with, or without, a match.

The attribute properties, combined with the product input type determines which attributes can be used for layered navigation. Layered navigation is available only for “anchor” categories, but can also be added to search results pages. The **Catalog Input Type for Store Owner** property of each attribute must be set to “Dropdown,” “Multiple Select,” or “Price.” To make the attributes filterable, the **Use in Layered Navigation** property of each must be set to either “Filterable (with results)” or “Filterable (no results).”



*Filterable Attributes In Layered Navigation*



*Filterable Swatch Value with No Results*



The following instructions show how to set up basic layered navigation with filterable attributes. For advanced layered navigation with price steps, see: [Price Navigation](#).

### Process Overview:

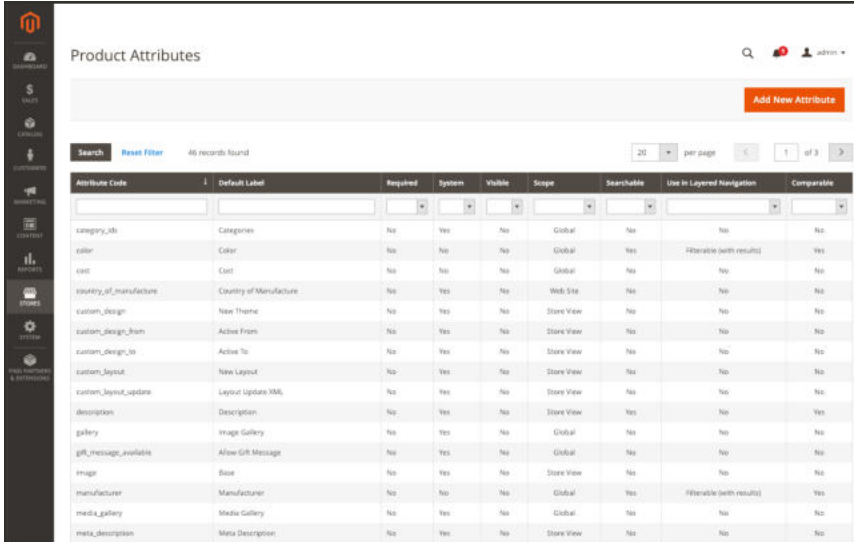
Step 1: [Set Up the Attribute Properties](#)

Step 2: [Make the Category an Anchor](#)

Step 3: [Test the Results](#)

## Step 1: Set Up the Attribute Properties

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. Find an attribute in the list using the filtered search or browsing. Select the filter to open in edit mode.



Attribute Code	Default Label	Required	System	Visible	Scope	Searchable	Use in Layered Navigation	Comparable
category_id	Categories	No	Yes	No	Global	No	No	No
color	Color	No	No	No	Global	Yes	Filterable (with results)	Yes
cost	Cost	No	No	No	Global	No	No	No
country_of_manufacture	Country of Manufacture	No	Yes	No	Web Site	No	No	No
custom_design	New Theme	No	Yes	No	Store View	No	No	No
custom_design_from	Active From	No	Yes	No	Store View	No	No	No
custom_design_to	Active To	No	Yes	No	Store View	No	No	No
custom_layout	New Layout	No	Yes	No	Store View	No	No	No
custom_layout_update	Layout Update URL	No	Yes	No	Store View	No	No	No
description	Description	No	Yes	No	Store View	Yes	No	Yes
gallery	Image Gallery	No	Yes	No	Global	No	No	No
gift_message_available	Allow Gift Message	No	Yes	No	Global	No	No	No
image	Base	No	Yes	No	Store View	No	No	No
manufacturer	Manufacturer	No	No	No	Global	Yes	Filterable (with results)	Yes
media_gallery	Media Gallery	No	Yes	No	Global	No	No	No
meta_description	Meta Description	No	Yes	No	Store View	No	No	No

*Enter search terms per column to use Filtered Search*

- a. In the panel on the left, choose **Storefront Properties**. Then, set **Use In Layered Navigation** to one of the following:

Filterable (with results)

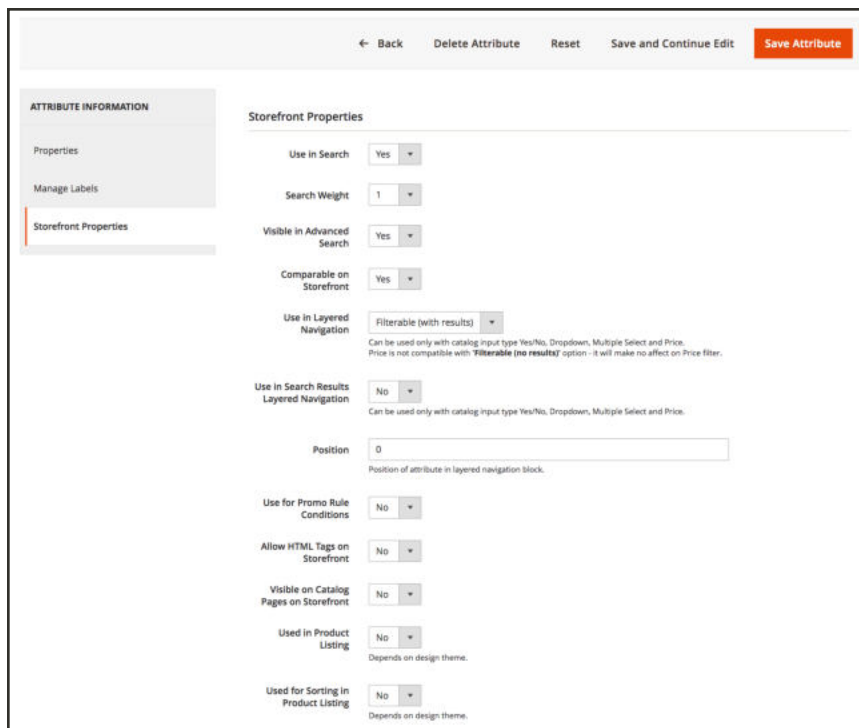
Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list should still appear as an available filter. Attribute values with a count of zero (0) product matches are omitted from the list of available filters.

The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.

Filterable (no results)

Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out. Price layered filtering is not supported by this option, and does not affect Price filters.

- b. Set **Use In Search Results Layered Navigation** to “Yes.”



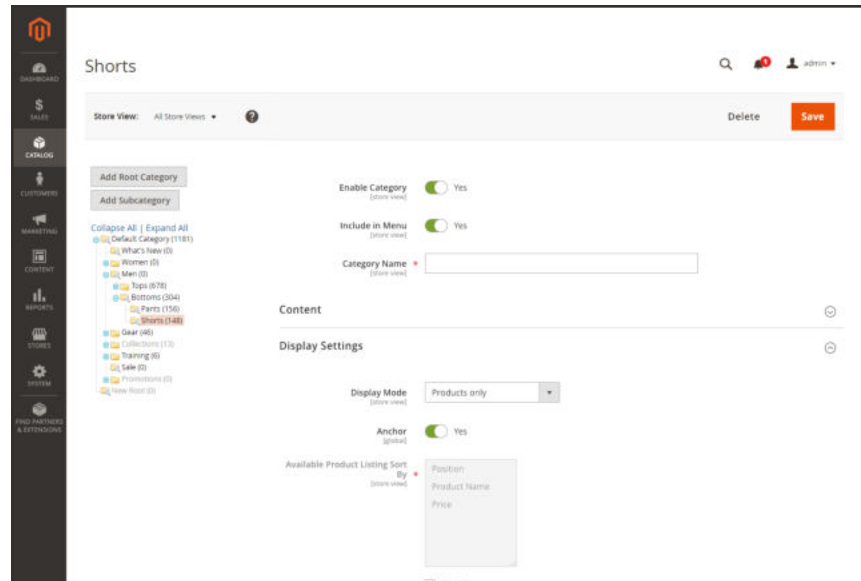
*Storefront Properties*

- 3. Repeat these steps for each attribute that you want to include in layered navigation.

The **Position** field will be grayed out by default. You must save the attribute before you can modify this setting.

## Step 2: Make the Category an Anchor

1. On the Admin sidebar, tap **Products**. Then under **Inventory** choose **Categories**.
2. In the categories tree on the left, select the category where you want to use layered navigation.
3. Expand ☺ the **Display Settings** section. Then, set **Anchor** to “Yes.”
4. Tap **Save**.



*Category Display Settings*

## Step 3: Test the Results

To test the setting, visit your store and navigate to the category from the main menu. The selection of filterable attributes appears in the layered navigation of the category page.

Search, filter, and review the displayed products.

## Price Navigation

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

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

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

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

### Example: Price Navigation Steps

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

### To configure price navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Layered Navigation** section. Then, do the following:
  - a. By default, **Display Product Count** is set to “Yes.” The change the setting, first clear the **Use system value** checkbox.
  - b. Set **Price Navigation Steps Calculation** to one of the following methods:

The screenshot shows the 'Layered Navigation' configuration panel. It contains two main settings:

- Display Product Count** (store view): A dropdown menu is set to 'Yes'. To its right is a checked checkbox labeled 'Use system value'.
- Price Navigation Step Calculation** (store view): A dropdown menu is set to 'Automatic (equalize price ranges)'. To its right is a checked checkbox labeled 'Use system value'.

#### *Layered Navigation*

### Method 1: Automatic (equalize price ranges)

Leave **Price Navigation Steps Calculation** set to the default, “Automatic (Equalize Price Ranges.)” This setting uses the standard algorithm for price navigation.

### Method 2: Automatic (equalize product counts)

To change the value of any of the following fields, first clear the **Use system value** checkbox.

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

The screenshot shows the 'Layered Navigation' configuration panel with the following settings:

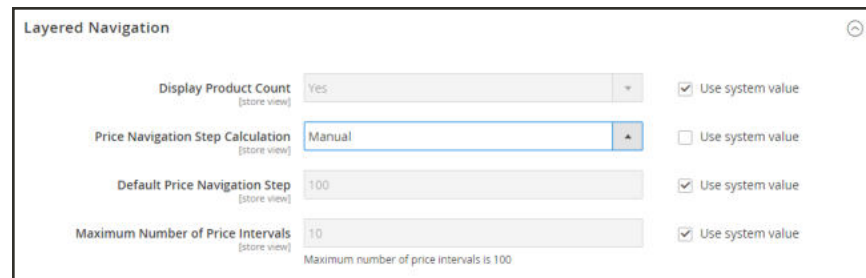
- Display Product Count** (store view): A dropdown menu is set to 'Yes'. To its right is a checked checkbox labeled 'Use system value'.
- Price Navigation Step Calculation** (store view): A dropdown menu is set to 'Automatic (equalize product counts)'. To its right is an unchecked checkbox labeled 'Use system value'.
- Display Price Interval as One Price** (store view): A dropdown menu is set to 'Yes'. Below it is a note: "This setting will be applied when all prices in the specific price interval are equal." To its right is an unchecked checkbox labeled 'Use system value'.
- Interval Division Limit** (store view): A text input field contains the number '9'. Below it is a note: "Please specify the number of products, that will not be divided into subintervals." To its right is a checked checkbox labeled 'Use system value'.

#### *Automatic (equalize product counts)*

### Method 3: Manual

To change the value of any of the following fields, first clear the **Use system value** checkbox.

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



The screenshot shows the 'Layered Navigation' configuration panel. It contains four settings, each with a 'Use system value' checkbox:

- Display Product Count** (store view): Set to 'Yes'. The 'Use system value' checkbox is checked.
- Price Navigation Step Calculation** (store view): Set to 'Manual'. The 'Use system value' checkbox is unchecked.
- Default Price Navigation Step** (store view): Set to '100'. The 'Use system value' checkbox is checked.
- Maximum Number of Price Intervals** (store view): Set to '10'. The 'Use system value' checkbox is checked. A note below the field states 'Maximum number of price intervals is 100'.

*Manual*

4. When complete, tap **Save Config**.

## Configuring Layered Navigation

The layered navigation configuration determines if a product count appears in parentheses after each attribute, and the size of the step calculation that is used in price navigation.

### To configure layered navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, expand the **Catalog** section. Then choose **Catalog**.
3. Expand the **Layered Navigation** section, and do the following:



Layered Navigation	
Display Product Count <small>[store view]</small>	Yes <input type="checkbox"/> Use system value
Price Navigation Step Calculation <small>[store view]</small>	Automatic (equalize price ranges) <input checked="" type="checkbox"/> Use system value

### *Layered Navigation*

- a. To display the number of products found for each attribute, set **Display Product Count** to “Yes.” If necessary, first clear the **Use system value** checkbox.
  - b. Set **Price Navigation Step Calculation** to “Automatic (equalize price ranges).” If necessary, first clear the **Use system value** checkbox.
4. When complete, tap **Save Config**.



## CHAPTER 32:

# Catalog Search

Research shows that people who use search are more likely to make a purchase than those who rely on navigation alone. In fact, according to some studies, people who use search are nearly twice as likely to make a purchase. In this section of the guide, we will explore how customers search for products in your catalog, and how you can configure catalog search.

- [Quick Search](#)
- [Advanced Search](#)
- [Search Results](#)
- [Configuring Catalog Search](#)
- [Flat Catalog](#)

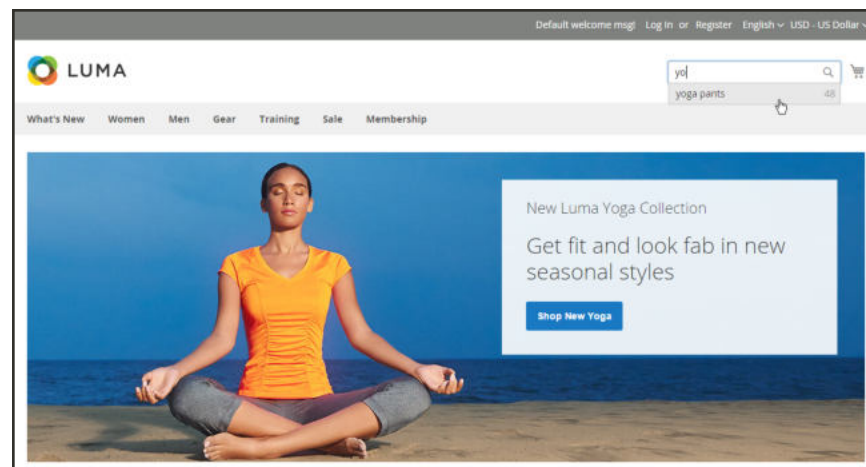


## Quick Search

The Search box in the header of the store helps visitors find products in your catalog. The search text can be the full or partial product name, or any other word or phrase that describes the product. The search terms that people use to find products can be managed from the Admin.

### To do a quick search:

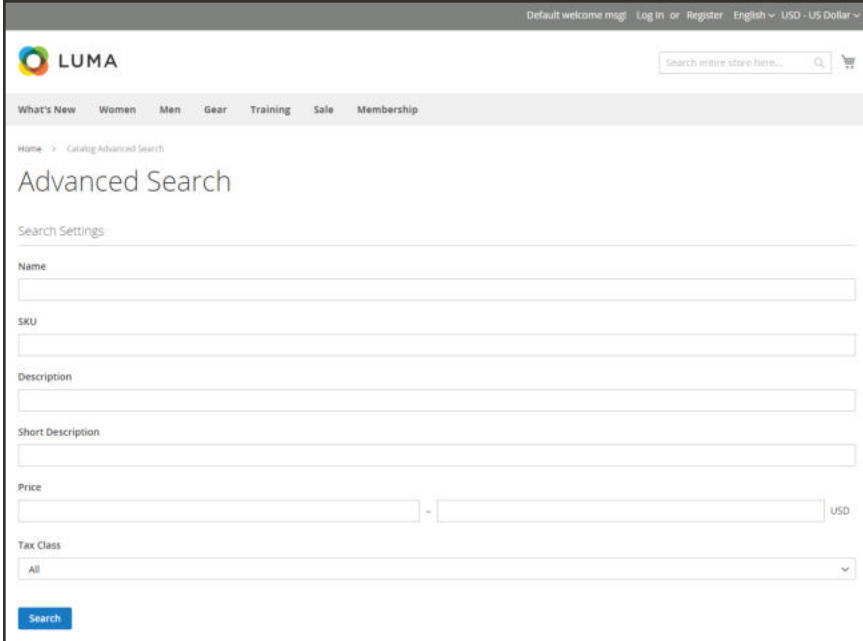
1. In the **Search** box, enter the first few letters of what you want to find.  
Any matches in the catalog appear below, with the number of results found.
2. Either press the **Enter** key or tap a result in the list of matching products.



*Search*

## Advanced Search

Advanced Search lets shoppers search the catalog based on values entered into a form. Because the form contains multiple fields, a single search can include several parameters. The result is a list of all products in the catalog that match the criteria. A link to Advanced Search is in the footer of your store.

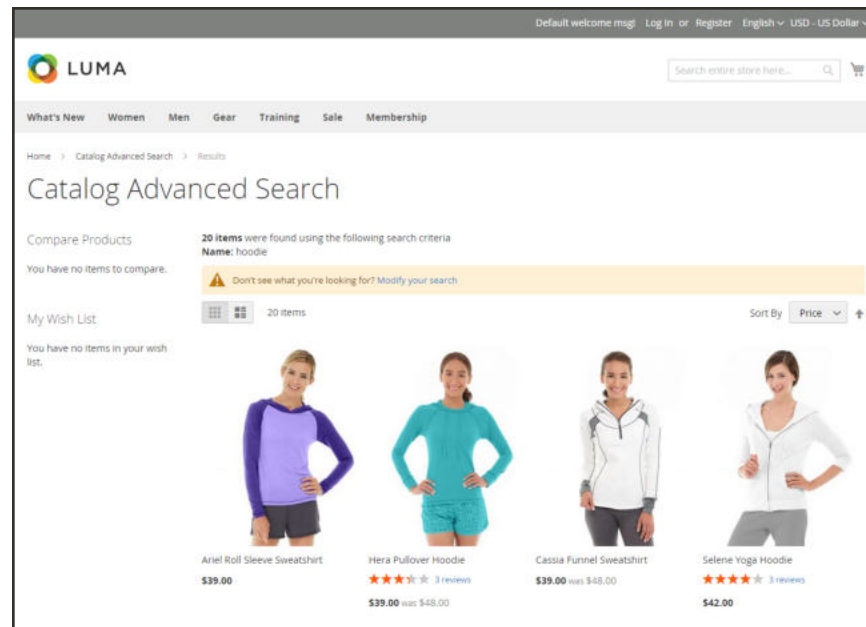
A screenshot of the LUMA Advanced Search form. The page header includes the LUMA logo, a search bar with the text "Search entire store here...", and navigation links for "What's New", "Women", "Men", "Gear", "Training", "Sale", and "Membership". The breadcrumb trail shows "Home > Catalog Advanced Search". The form is titled "Advanced Search" and contains the following fields: "Name", "SKU", "Description", "Short Description", "Price" (with a minus sign and "USD" label), and "Tax Class" (with a dropdown menu set to "All"). A blue "Search" button is located at the bottom left of the form.

*Advanced Search*

Each field in the form corresponds to an attribute from your product catalog. To add a field, set the frontend properties of the attribute to “Include in Advanced Search.” As a best practice, include only the fields that customers are most likely to use to find a product, because having too many will slow down the search.

### To use advanced search:

1. In the footer of the store, click **Advanced Search**.
2. In the Advanced Search form, full or partial values in as many fields as necessary.
3. Tap **Search** to display the results.



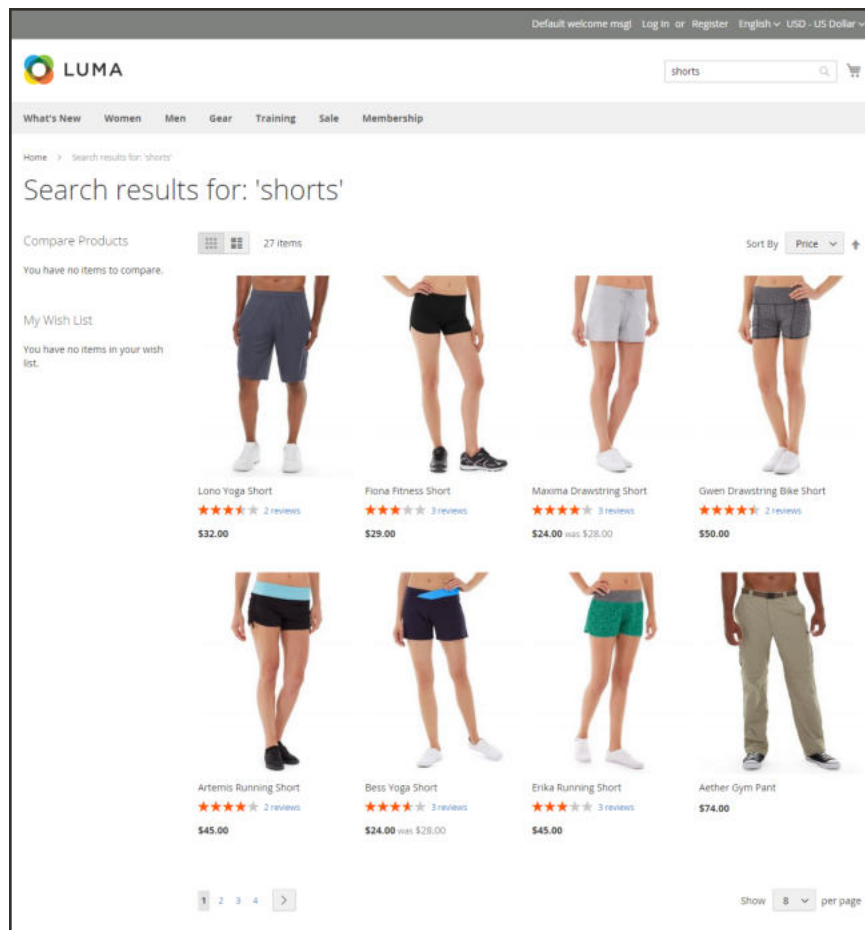
*Search Results*

4. If you don't see what you are looking for in the search results, tap **Modify your search** and try another combination of criteria.

## Search Results

The Search Results list includes all products that match the search criteria entered in the Quick Search box or the Advanced Search form. Every product list in the catalog has essentially the same controls. The only difference is that one is the result of a search query, and the other is the result of **navigation**.

The results can be formatted as either a grid or list, and sorted by a selection of attributes. **Pagination** controls appear if there are more products than fit on the page, and are used to move from one page to the next. The number of records per page is determined by the Catalog Frontend configuration. To learn more, see **Product Listings**.



*Search Results with Pagination Controls*

## Weighted Search

Product attributes that are enabled for catalog search can be assigned a weight to give them a higher value in search results. Attributes with a greater weight are returned before those with a lower weight. For example, if there are two attributes in the system, “color” with a search weight of 3 and “description” with a search weight of 1. A search for the word “red,” returns a list of products with a color attribute value of “red,” but does not return products with descriptions that contain the word “red.” In this example, the color attribute has a greater weight than the description attribute.



*Search Weight*

### To set the search weight properties of an attribute:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. Find the attribute in the list, and open in edit mode.
3. In the panel on the left, choose **Storefront Properties**. Then, do the following:
  - a. To include the attribute in search queries, set **Use in Search** to “Yes.”
  - b. To establish the search value of the attribute, set **Search Weight** to a number from 1 to 10, where 10 has the highest priority. If no value is entered, all attributes have a search weight of 1.
4. When complete, tap **Save Attribute** button.

## Configuring Catalog Search

Magento offers a choice of search engines and versions, and supports both MySQL and Elasticsearch. The search engine configuration includes a set of general settings and additional features specific to the search engine. By default, Magento uses the MySQL search engine.

### MySQL

---

MySQL is the default search engine used by Magento Open Source.

### Elasticsearch

---

Elasticsearch is a powerful and highly scalable distributed search engine that is used by many industry leaders with high-volume sites.

### General Search Options

---

All search engines include a set of search options.

#### Search Options

OPTION	SCOPE	DESCRIPTION
Minimal Query Length	Store View	The minimum number of characters allowed in a catalog search.  The value set for this option must be compatible with the corresponding range set in your selected search engine configurations. For example, if you set this value to 2 in Magento, update the value in your search engine.
Maximum Query Length	Store View	The maximum number of characters allowed in a catalog search.  The value set for this option must be compatible with the corresponding range set in your selected search engine configurations. For example, if you set this value to 300 in Magento, update the value in your search engine.
Number of top search results to cache	Store View	The number of popular search terms and results to cache for faster responses. Entering a value of 0 caches all search terms and results when entered a second time. Default value: 100
Autocomplete Limit	Store View	The maximum number of search results to display for search autocomplete. Restricting this amount increases performance of searches and reduces the displayed list size. Default value: 8

**Search Options (cont.)**

OPTION	SCOPE	DESCRIPTION
Enable Search Suggestions	Store View	Determines if search suggestions appear for common misspellings. When enabled, search suggestions are offered for any request that returns no results. Search suggestions can impact the performance of search. Options: Yes / No  When set to Yes, additional options display for Enable Search Recommendations and associated fields.
Search Suggestions Count	Store View	The maximum number of search suggestions offered. Default value: 2
Show Results Count for Each Suggestion	Store View	Determines if the number of search results is shown for each suggestion. Depending on theme, the number usually appears in brackets after the suggestion. Options: Yes / No
Enable Search Recommendations	Store View	Determines if search recommendations are offered when a search returns no results. Options include: Yes / No  When set to Yes, additional options display for Search Recommendations Count and Shows Results Count for Each Recommendation.
Search Recommendations Count	Store View	Specifies the number of search terms offered as recommendations. By default, no more than five are shown.
Show Results Count for Each Recommendation	Store View	When set to "Yes," the number of products found for the proposed search recommendation is shown in the brackets. Options: Yes / No

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### MySQL

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### General Search Options

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#### Search Options

OPTION	SCOPE	DESCRIPTION
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Maximum Query Length	Store View	The maximum number of characters allowed in a catalog search.  The value set for this option must be compatible with the corresponding range set in your selected search engine configurations. For example, if you set this value to 300 in Magento, update the value in your search engine.
Number of top search results to cache	Store View	The number of popular search terms and results to cache for faster responses. Entering a value of 0 caches all search terms and results when entered a second time. Default value: 100
Autocomplete Limit	Store View	The maximum number of search results to display for search autocomplete. Restricting this amount increases performance of searches and reduces the displayed list size. Default value: 8



**Search Options (cont.)**

OPTION	SCOPE	DESCRIPTION
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Search Suggestions Count	Store View	The maximum number of search suggestions offered. Default value: 2
Show Results Count for Each Suggestion	Store View	Determines if the number of search results is shown for each suggestion. Depending on theme, the number usually appears in brackets after the suggestion. Options: Yes / No
Enable Search Recommendations	Store View	Determines if search recommendations are offered when a search returns no results. Options include: Yes / No  When set to Yes, additional options display for Search Recommendations Count and Shows Results Count for Each Recommendation.
Search Recommendations Count	Store View	Specifies the number of search terms offered as recommendations. By default, no more than five are shown.
Show Results Count for Each Recommendation	Store View	When set to "Yes," the number of products found for the proposed search recommendation is shown in the brackets. Options: Yes / No

## MySQL

MySQL is the default search engine. By adjusting the Catalog Search configuration, you can control the behavior of the search operations and determine the size of valid query text and the display of search recommendations. By default, MySQL always has the EAV Indexer enabled. This feature improves indexation speed and restricts the indexer from use by 3rd party extensions.

**Catalog Search**

**Minimal Query Length** [store view] 1  Use system value

**Maximum Query Length** [store view] 128  Use system value

**Number of top search results to cache** [store view] 100  Use system value  
Number of popular search terms to be cached for faster response. Use "0" to cache all results after a term is searched for the second time.

**Search Engine** [global] MySQL  Use system value

**Autocomplete Limit** [store view] 8  Use system value

**Enable Search Suggestions** [store view] Yes  When you enable this option your site may slow down.

**Search Suggestions Count** [store view] 2

**Show Results Count for Each Suggestion** [store view] No  When you enable this option your site may slow down.

**Enable Search Recommendations** [store view] Yes  When you enable this option your site may slow down.

**Search Recommendations Count** [store view] 5

**Show Results Count for Each Recommendation** [store view] No

### *MySQL Configuration*

#### To configure MySQL search:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Catalog Search** section.
4. By default, the **Search Engine** is set to “MySQL.” If switching to MySQL, select that option. This affects the available fields.
5. To limit the length and word count of search query text, set the **Minimal Query Length** and **Maximum Query Length**.

**Important:** The value set for this minimum and maximum range must be compatible with the corresponding range set in your MySQL search engine configurations. For example, if you set these values to 2 and 300 in Magento, update the values in your search engine.

6. To limit the amount of popular search results to cache for faster responses, set an amount for **Number of top search results to cache**.

The default is 100. Entering a value of 0 caches all search terms and results when entered a second time.

7. To limit the maximum number of search results to display for search autocomplete, set an amount for **Autocomplete Limit**. Restricting this amount increases performance of searches and reduces the displayed list size. The default amount is 8.

8. To display search suggestions, set **Enable Search Suggestions** to “Yes.” Additional configuration options display.

- a. In the **Search Suggestion Count** field, enter the number of suggestions to offer for each search term that returns no results. The default is 2.

- b. To display the number of search results for each suggested term, set **Show Results Count for Each Suggestion** to “Yes.”

9. To offer search recommendations, set **Enable Search Recommendations** to “Yes.” Additional configuration options display.

- a. In the **Search Recommendations Count** field, enter the number of recommendations that you want to offer. The default is 5.

- a. To display the number of results for each recommendation, set **Show Results Count for Each Recommendation** to “Yes.”

10. When complete, tap **Save Config**.

## Elasticsearch

Elasticsearch is a powerful and highly scalable distributed search engine that is used by such high-volume sites as eBay, Wikipedia, and GitHub. The implementation of Elasticsearch includes both search suggestions and recommendations. For installation instructions, see [Set up Elasticsearch service](#) in the developer documentation.

### Step 1: Configure Search Options

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Catalog Search** section.
4. For the **Search Engine** field, clear the **Use system value** checkbox and choose the version that is installed on your server.

Elasticsearch (Deprecated) Elasticsearch 2.0+ has reached end of life, and is now deprecated. To learn more, see [Elastic Product End of Life Dates](#).

Elasticsearch 5.0+ (Default) Elasticsearch 5.0+ is scheduled for end of life. To learn more, see [Elastic Product End of Life Dates](#).

Elasticsearch 6.0+ (Recommended) For the best performance, we recommend that you use the latest version of Elasticsearch 6.0+.

To learn more about using Elasticsearch versions 2.x and 5.x, see [Change the Elasticsearch Client](#).

**Catalog Search**

Minimal Query Length [store view] 1  Use system value

Maximum Query Length [store view] 128  Use system value

Number of top search results to cache [store view] 100  Use system value  
Number of popular search terms to be cached for faster response. Use '0' to cache all results after a term is searched for the second time.

Enable EAV Indexer [global] Yes  Use system value  
Enable/Disable Product EAV indexer to improve indexation speed. Make sure that indexer is not used by 3rd party extensions.

Search Engine [global] Elasticsearch 5.0+  Use system value

Autocomplete Limit [store view] 8  Use system value

### *Elasticsearch Settings*

5. For **Enable EAV Indexer**, set if you want to enable or disable the Product EAV indexer. This feature improves indexation speed and restricts the indexer from use by 3rd party extensions. This option only displays for Elasticsearch or Elasticsearch 5.0+ Search Engines.

- To limit the length and word count of search query text, set the **Minimal Query Length** and **Maximum Query Length**.

**Important:** The value set for this minimum and maximum range must be compatible with the corresponding range set in your Elasticsearch search engine configurations. For example, if you set these values to 2 and 300 in Magento, update the values in your search engine.

- To limit the amount of popular search results to cache for faster responses, set an amount for **Number of top search results to cache**.

The default is 100. Entering a value of 0 caches all search terms and results when entered a second time.

- To limit the maximum number of search results to display for search autocomplete, set an amount for **Autocomplete Limit**. Restricting this amount increases performance of searches and reduces the displayed list size. The default amount is 8.

## Step 2: Configure the Elasticsearch Connection

The screenshot shows a configuration form for Elasticsearch. It contains the following fields and values:

- Elasticsearch Server Hostname** (global): localhost
- Elasticsearch Server Port** (global): 9200
- Elasticsearch Index Prefix** (global): magento2
- Enable Elasticsearch HTTP Auth** (global): No
- Elasticsearch Server Timeout** (global): 15

A **Test Connection** button is positioned below the timeout field.

*Elasticsearch Connection Settings*

- Enter the **Elasticsearch Server Hostname**. The default is: localhost.
- Enter the **Elasticsearch Server Port**.
- In the **Elasticsearch Index Prefix** field, enter a prefix to identify the Elasticsearch index. For example: Magento2.
- Set **Enable Elasticsearch HTTP Auth** to “Yes” to use HTTP authentication to prompt for a username and password to access Elasticsearch Server.
- In the **Elasticsearch Server Timeout** field, enter the number of seconds before the system times out. The default is: 15.
- To verify the configuration, tap **Test Connection**.

### Step 3: Configure Suggestions and Recommendations

Search suggestions and recommendations can impact server performance.

1. Set **Enable Search Suggestions** to “Yes.” Then, do the following:

The screenshot shows the configuration interface for Elasticsearch suggestions and recommendations. It includes the following settings:

- Enable Search Suggestions:** Set to Yes. A warning message below reads: "When you enable this option your site may slow down."
- Search Suggestions Count:** Set to 2.
- Show Results Count for Each Suggestion:** Set to No. A warning message below reads: "When you enable this option your site may slow down."
- Enable Search Recommendations:** Set to Yes. A warning message below reads: "When you enable this option your site may slow down."
- Search Recommendations Count:** Set to 5.
- Show Results Count for Each Recommendation:** Set to No.

*Elasticsearch Suggestion and Recommendation Settings*

- a. In the **Search Suggestions Count** field, enter the number of search suggestions to offer.
  - b. To show the number of results found for each suggestion, set **Show Results for Each Suggestion** to “Yes.”
2. To offer recommendations, set **Enable Search Recommendations** to “Yes.” Then, do the following:
    - a. In the **Search Recommendation Count** field, enter the number of recommendations to offer.
    - b. To show the number of results found for each recommendation, set **Show Results Count for Each Recommendation** to “Yes.”
  3. When complete, tap **Save Config.**





## CHAPTER 33:

# Search Terms

You can learn what your customers are looking for by examining the search terms they use to find products in your store. If enough people look for a product that you don't carry, perhaps it's time to add it to your catalog. Meanwhile, rather than have them leave them empty handed, why not redirect them to another product in your catalog? Here are a few ways you can leverage customer search terms:

### Landing Page

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The landing page for a search term can be a content page, a category page, a product detail page, or even a page on a different site.

### Synonyms

---

One way to improve the effectiveness of catalog search is to include different terms that people may use to describe the same item. You don't want to lose a sale just because someone is looking for a "sofa," and your product is listed as a "couch." You can capture a broader range of search terms by entering the words, "sofa" "davenport," and "loveseat" as synonyms for "couch," and direct them to the same landing page.

### Misspelled Words

---

Use search terms to capture common misspellings and redirect them to the appropriate page. For example, if you sell wrought iron patio furniture, you know that many people misspell the term as "rod iron," or even "rot iron." You can enter each misspelled word as a search term, and make them synonyms for "wrought iron." Even though the word is misspelled, the search will be directed to the page for "wrought iron."

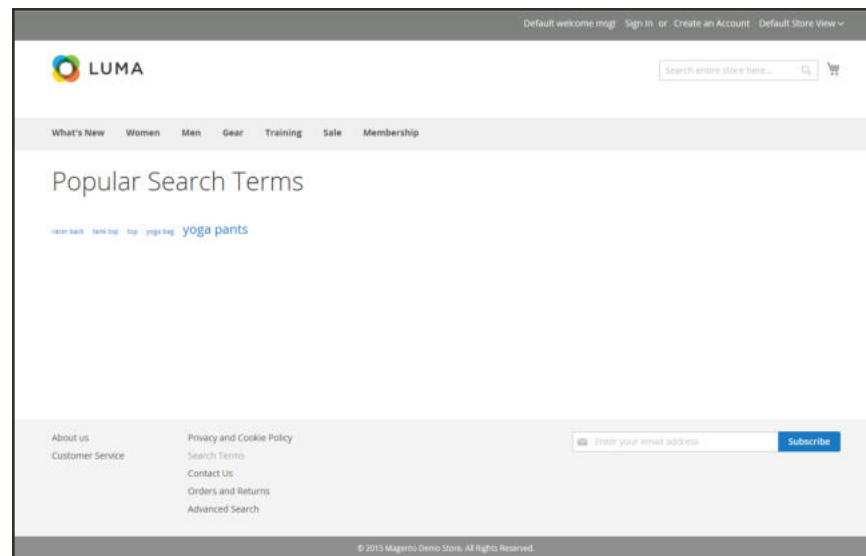


## Popular Search Terms

The Search Terms link in the footer of your store displays the search terms used by visitors to your store, ranked by popularity. Search terms appear in a “tag cloud” format, where the size of the text indicates the popularity of the term.

By default, Popular Search Terms is enabled as a search engine optimization tool, but has no direct connection to the catalog search process. Because the Search Terms page is indexed by search engines, any terms on the page can help improve your search engine ranking and the visibility of your store. The URL of the Popular Search Terms page is:

`mystore.com/search/term/popular/`



*Popular Search Terms*

### To configure Popular Search Terms:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Search Engine Optimization** section.
4. Clear the **Use system value** checkbox. Then, set **Popular Search Terms** as needed.
5. When complete, tap **Save Config**.

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

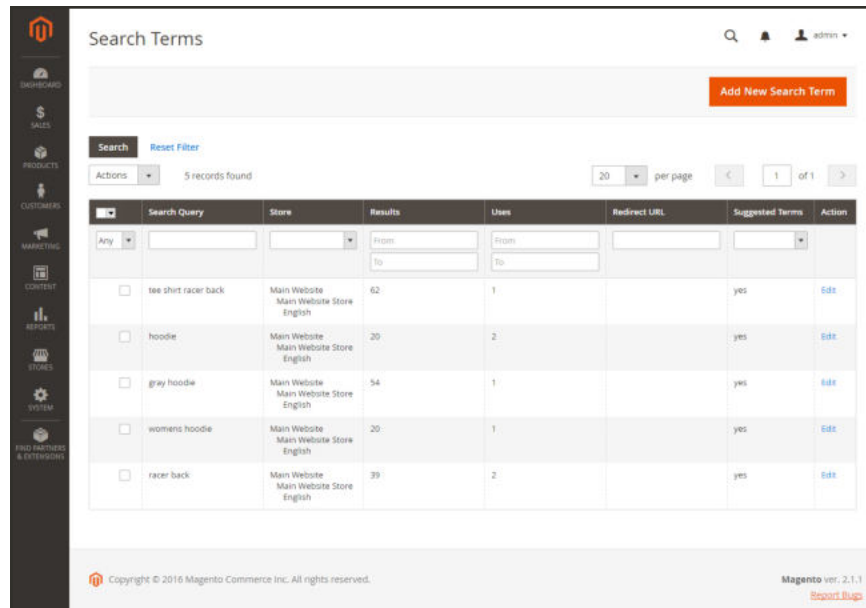
- Popular Search Terms**: Set to 'Enable'.  Use system value
- Product URL Suffix**: Set to '.html'.  Use system value. Note: You need to refresh the cache.
- Category URL Suffix**: Set to '.html'.  Use system value. Note: You need to refresh the cache.
- Use Categories Path for Product URLs**: Set to 'No'.  Use system value
- Create Permanent Redirect for URLs if URL Key Changed**: Set to 'Yes'.  Use system value
- Page Title Separator**: Set to '-'.  Use system value
- Use Canonical Link Meta Tag For Categories**: Set to 'No'.  Use system value
- Use Canonical Link Meta Tag For Products**: Set to 'No'.  Use system value

### *Search Engine Optimization*

You can further configure the caching of popular searches and additional options for your configured search engine **MySQL** or **Elasticsearch**.

## Adding Search Terms

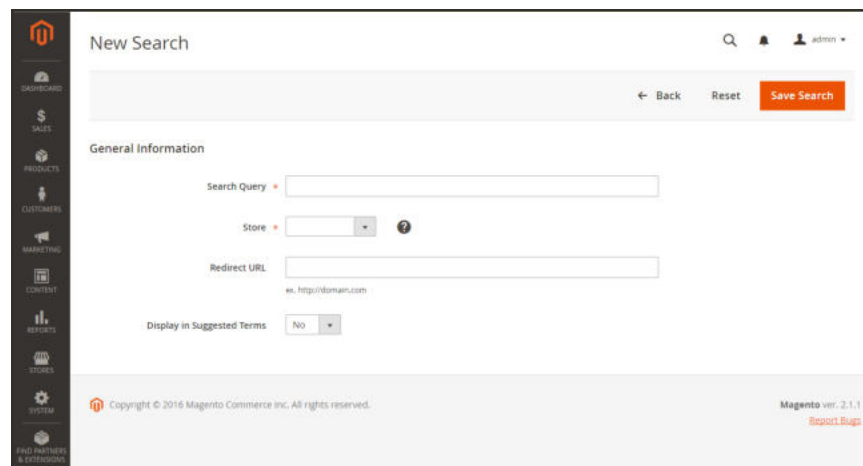
As you learn new words that people use to search for products in your catalog, you can add them to your search terms list to direct people to the most closely matching products in your catalog.



Search Terms

### To add a new search term:

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **Search Terms**.
2. Tap **Add New Search Term**. Then, do the following:



General Information

- a. Under General Information in the **Search Query** box, type the word or phrase that you want to add as a new search term.
  - b. If your store is available in multiple languages, choose the applicable **Store** view.
  - c. To redirect the search results to another page in your store, or to another website, enter the full URL of the target page in the **Redirect URL** field.
  - d. If you want this term to be available for use as a suggestion whenever a search returns no results, set **Display in Suggested Terms** to “Yes.”
3. When complete, tap **Save Search**.

### To edit a search term:

1. In the Search Terms grid, click the row of any record to open the search term in edit mode.
2. Make the necessary changes.
3. When complete, tap **Save Search**.

### To delete a search term:

1. In the list, mark the checkbox of the term to be deleted.
2. In the upper-left corner of the list, set **Actions** to “Delete.”
3. When complete, tap **Submit**.

## Search Terms Report

The Search Terms report shows the number of results for each term, and the number of times (hits) the term was used. The report data can be filtered by term, store, results, and hits, and exported for further analysis.

### To view the search terms report:

1. On the Admin sidebar, tap **Reports**. Then under **Marketing**, choose **Search Terms**.
2. Use the controls to filter the report as needed.

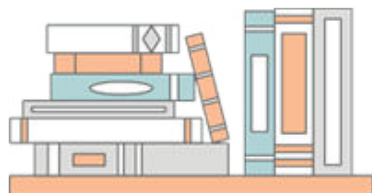
ID	Search Query	Store	Results	Hits
11	racer back	Main Website Main Website Store English	39	2
7	womens hoodie	Main Website Main Website Store English	20	1
9	gray hoodie	Main Website Main Website Store English	54	1
3	hoodie	Main Website Main Website Store English	20	2
1	tee shirt racer back	Main Website Main Website Store English	62	1

*Search Terms Report*

## CHAPTER 34:

# SEO Best Practices

Search engine optimization is the practice of fine-tuning the content and presentation of a site to improve the way the pages are indexed by search engines. Magento Open Source includes a number of features to support your ongoing SEO effort.



### Commerce Resources

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See the latest [Magento eBooks](#) to gain access to expert insight and online business resources to help develop and improve your store.



### Meta Data

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Learn more about adding and enhancing keyword-rich meta data for your site and store.



### Using a Sitemap

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A site map improves the way your store is indexed by search engines, and is specifically designed to find pages that might be overlooked by web crawlers. A site map can be configured to index all pages and images.



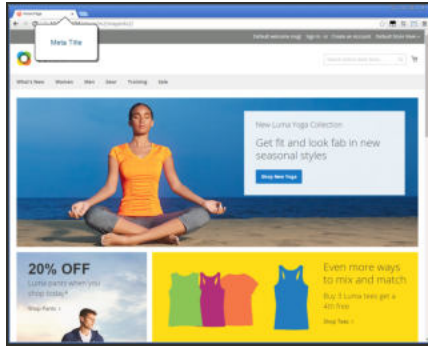
## URL Rewrites

---

The URL Rewrite tool lets you change any URL that is associated with a product, category, or CMS page.

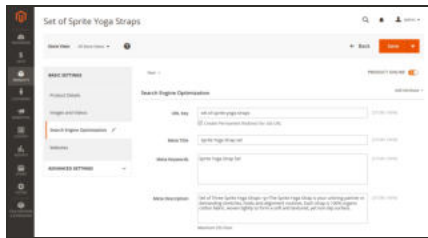
## Meta Data

Your store is loaded with places where you can enter keyword-rich meta data to improve the way search engines index your site. While setting up your store, you might enter preliminary meta data, with the intention of finishing it later. Over time, you can fine-tune the meta data to target the buying patterns and preferences of your customers.



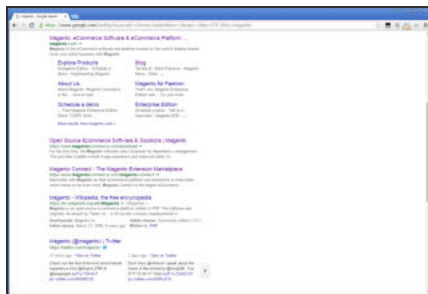
### Meta Title

The meta title appears in the title bar and tab of your browser, and search results listings. The meta title should be unique to the page, and less than seventy characters in length.



### Meta Keywords

Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in the meta title and meta description.



### Meta Description

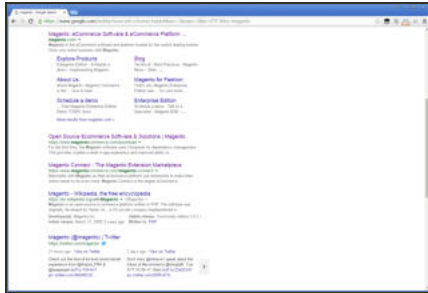
Meta descriptions provide a brief overview of the page for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field will accept up to 255 characters.





## Canonical Meta Tag

The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content.



## Rich Snippets

Rich snippets provide detailed information for search results listings and other applications. By default, structured data markup that is based on the [schema.org](https://schema.org) standard is added to your store's product template. As a result, more information is available for search engines to include as "rich snippets" in product listings.

## Canonical Meta Tag

Some search engines penalize websites that have multiple URLs that point to the same content. The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content. Using the canonical meta tag can improve your site ranking and aggregate pageviews. The canonical meta tag is placed in the <head> block of a product or category page. It provides a link to your preferred URL, so search engines will give it greater weight.

### Example 1: Category Path Creates Duplicate URLs

For example, if your catalog is configured to include the category path in product URLs, your store will generate multiple URLs that point to the same product page.

```
http://mystore.com/gear/bags/driven-backpack.html  
http://mystore.com/driven-backpack.html
```

### Example 2: Category Page Full URL

When canonical meta tags for categories are enabled, the category page of your store includes a canonical URL to the full category URL:

```
http://mystore.com/gear/bags/driven-backpack.html
```

### Example 3: Product Page Full URL

When canonical meta tags for products are enabled, the product page includes a canonical URL to the domain-name/product-url-key because product URL keys are globally unique.

```
http://mystore.com/driven-backpack.html
```

If you also include the category path in product URLs, the canonical URL remains domain-name/product-url-key. However, the product can also be accessed using its full URL, which includes the category. For example, if the product URL key is `driven-backpack`, and is assigned to the Gear > Bags category, the product can be accessed using either URL.

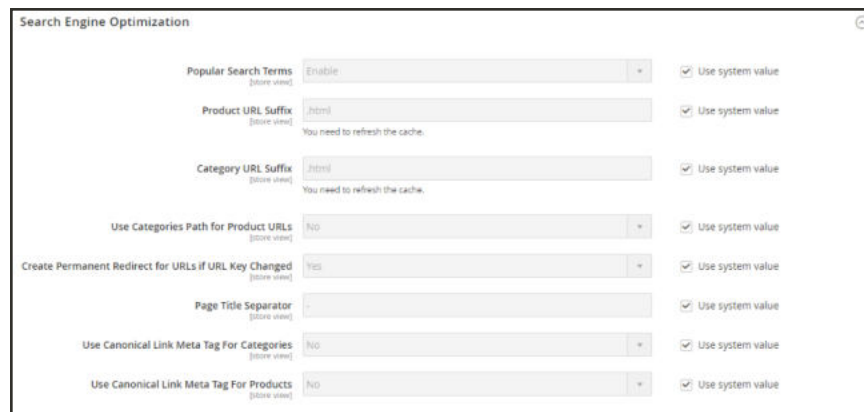
You can avoid being penalized by search engines by omitting the category from the URL, or by using the canonical meta tag to direct search engines to index either by product or category. As a best practice, it is recommended that you enable canonical meta tags for both categories and products.

### To enable the canonical meta tag:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose elect **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.

3. Expand  the **Search Engine Optimization** section.

To change any field values, you must first clear the **Use system value** checkbox after each field.



Setting	Value	Use system value
Popular Search Terms	Enable	<input checked="" type="checkbox"/>
Product URL Suffix	.html	<input checked="" type="checkbox"/>
Category URL Suffix	.html	<input checked="" type="checkbox"/>
Use Categories Path for Product URLs	No	<input checked="" type="checkbox"/>
Create Permanent Redirect for URLs if URL Key Changed	Yes	<input checked="" type="checkbox"/>
Page Title Separator	-	<input checked="" type="checkbox"/>
Use Canonical Link Meta Tag For Categories	No	<input checked="" type="checkbox"/>
Use Canonical Link Meta Tag For Products	No	<input checked="" type="checkbox"/>

### *Search Engine Optimization*

4. If you want search engines to index only category pages using the full category path, do the following:
  - a. Set **Use Canonical Link Meta Tag for Categories** to “Yes.”
  - b. Set **Use Canonical Link Meta Tag for Products** to “No.”
5. If you want search engines to index product pages only using the domain-name/product-url-key format, do the following:
  - a. Set **Use Canonical Link Meta Tag for Products** to “Yes.”
  - b. Set **Use Canonical Link Meta Tag for Categories** to “No.”
6. When complete, tap **Save Config**.

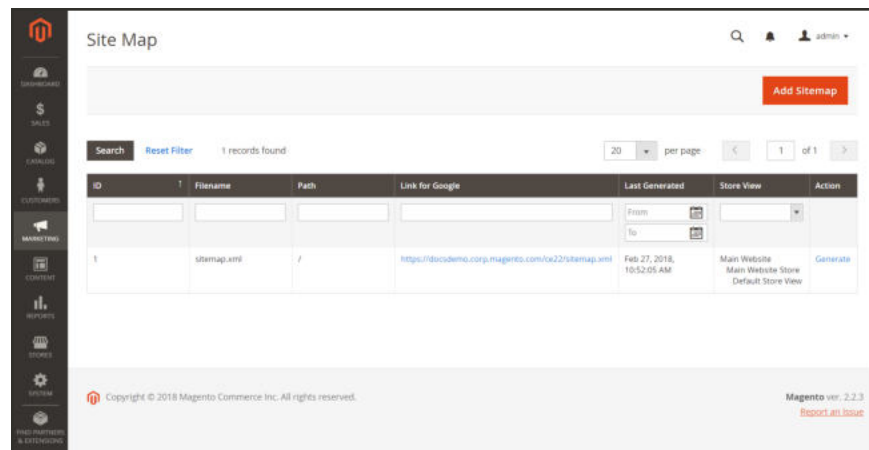
## Using a Site Map

A site map improves the way your store is indexed by search engines, and is specifically designed to find pages that might be overlooked by web crawlers. A site map can be configured to index all pages and images.

When enabled, Magento creates a file called `sitemap.xml` that is saved to your installation in the location that you specify. The configuration gives you the ability to set the frequency of the updates, and the priority for each type of content. Your site map should be updated as frequently as the content on your site changes, which might be daily, weekly, or monthly.

While your site is in development, you might include instructions in the `robots.txt` file for web crawlers to avoid indexing the site. Then before the launch, you can change the instructions to allow the site to be indexed.

For technical information, see: [Add sitemap and robots.txt](#) in the developer documentation.



*Site Map in Grid*

### Process Overview:

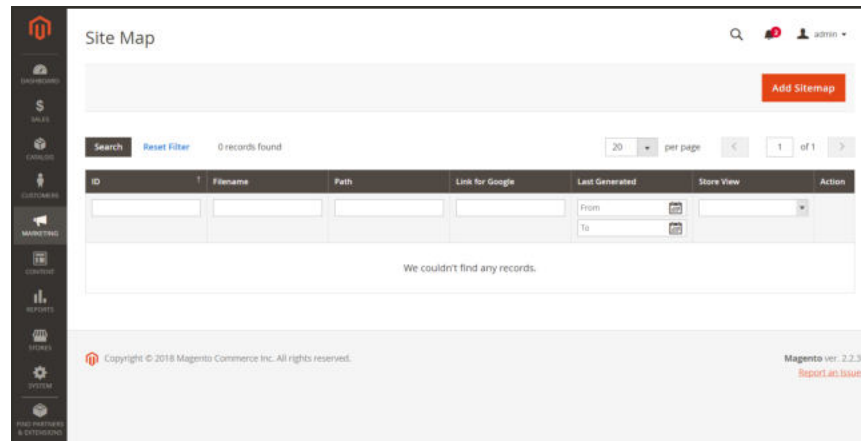
- Step 1: [Configure the Site Map](#)
- Step 2: [Generate the Site Map](#)
- Step 3: [Configure and Enable robots.txt](#) (Optional)
- Step 4: [Submit Your Site Map to Search Engines](#)
- Step 5: [Restore the Previous Robot Instructions](#) (Optional)

### Step 1: Configure the Site Map

Complete the [XML Sitemap configuration](#) to determine what is included, and how frequently the site map is updated.

## Step 2: Generate the Site Map

1. On the Admin menu, choose **Marketing**. Then under SEO & Search, choose **Site Map**.
2. Tap **Add Site Map**. Then, do the following:

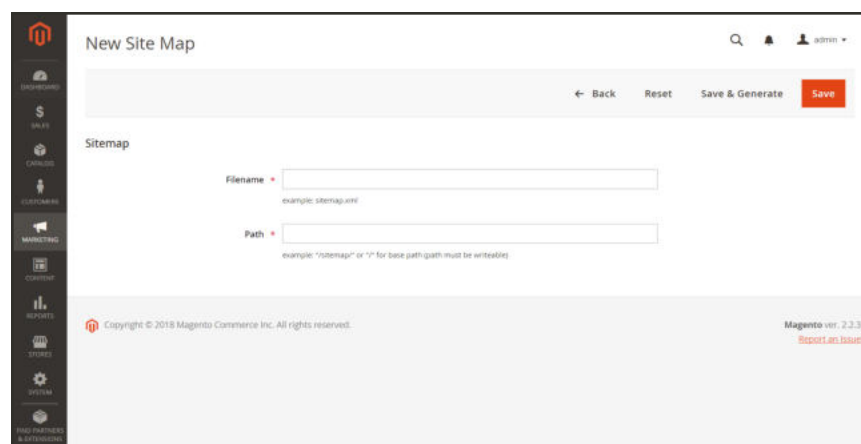


*Site Map*

- a. Enter the site map **Filename**. For example: `sitemap.xml`
- b. Enter the **Path** to determine where the site map file is to reside on the server. Make sure that the path is writeable.

`/sitemap/` Places the site map file in a directory called “sitemap.”

`/` Places the site map file at the base path, or root of your Magento installation.



*New Site Map*

3. When complete, tap **Save & Generate**.

It might take a few minutes for the site map to appear in the grid.

### Step 3: Configure and Enable robots.txt (Optional)

Complete the **Search Engine Robots** configuration with instructions that direct search engines to crawl the parts of your site that you want to be indexed.

### Step 4: Submit Your Site Map to Search Engines

You can submit your site map to different search engines by providing them the link to the `sitemap.xml` file in your Magento installation. To copy the link, do the following:

1. In the Site Map grid, right-click the URL in the **Link for Google** column.
2. On the menu, choose **Copy Link Address**.

For more information, see the instructions for the specific search engine. Here are links to instructions for two top search engines:

- [Google](#)
- [Microsoft Bing](#)

### Step 5: Restore Previous Robot Instructions (Optional)

You can now restore either the original, or default restrictions.

#### Column Descriptions

COLUMN	DESCRIPTION
ID	The sequential record number of the current site map.
Filename	The file name of the site map.
Path	The location where the site map resides on the server. For example: <code>/sitemap/</code> Places the site map file in a directory called "sitemap," one level below the root of the Magento installation.
	<code>/</code> Places the site map file at the base path, or root of the Magento installation.
Link for Google	The URL of the site map that is to be submitted to Google and other search engines.
Last Generated	Indicates the date and time the site map was last generated.
Store View	The store view where the site map applies.
Action	Generate                      Regenerates the site map.

## Site Map Configuration

Your site map should be updated as frequently as the content on your site changes, which could be on a daily, weekly, or monthly basis. The configuration lets you set the frequency and priority for each type of content.

### Step 1: Set the Frequency and Priority of Content Updates

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **XML Sitemap**.
3. Expand ☺ the **Categories Options** section. Then, do the following:
  - a. Set **Frequency** to one of the following:
    - Always
    - Hourly
    - Daily
    - Weekly
    - Monthly
    - Yearly
    - Never
  - b. In the **Priority** field, enter a value between 0.0 and 1.0. Zero has the lowest priority.

*Categories Options*

4. Click to expand the **Products Options** section. Then, complete the **Frequency** and **Priority** settings as needed.
5. To determine the extent that images are included in the sitemap, set **Add Images into Sitemap** to one of the following:
  - None
  - Base Only
  - All

**Products Options**

Frequency [store view] Daily  Use system value

Priority [store view] 1  Use system value  
Valid values range from 0.0 to 1.0.

Add images into Sitemap [store view] All  Use system value

*Products Options*

6. Click to expand the **CMS Pages Options** section. Then, complete the **Frequency** and **Priority** settings as needed.

**CMS Pages Options**

Frequency [store view] Daily  Use system value

Priority [store view] 0.25  Use system value  
Valid values range from 0.0 to 1.0.

*CMS Pages Options*

7. When complete, tap **Save Config.**

## Step 2: Complete the Generation Settings

1. Expand ☺ the **Generation Settings** section.

**Generation Settings**

Enabled [store view] No  Use system value

Start Time [store view] 00 : 00 : 00

Frequency [store view] Daily

Error Email Recipient [store view]

Error Email Sender [website] General Contact  Use system value

Error Email Template [website] Sitemap Generation Warnings (Default)  Use system value  
Email template chosen based on theme fallback when "Default" option is selected.


*Generation Settings*

2. To generate a sitemap, set **Enabled** to "Yes." Then, do the following:
  - a. Set **Start Time** to the hour, minute and second that you want the sitemap to be updated.
  - b. Set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly



- c. In the **Error Email Recipient** field, enter the email address of the person who is to receive notification if an error occurs during a sitemap update.
- d. Set **Error Email Sender** to the store contact who appears as the sender of the error notification.
- e. Set **Error Email Template** to the template used for the error notification.


### Step 3: Set the Site Map File Limits

1. Expand  the **Sitemap File Limits** section. Then, do the following:
  - a. In the **Maximum No of URLs per File** field, enter the maximum number of URLs that can be included in the sitemap. By default, the limit is 50,000.
  - b. In the **Maximum File Size** field, enter the largest size in bytes that is allocated for the sitemap. The default size is 10,485,760 bytes.



*Sitemap File Limits*

### Step 4: Set the Search Engine Submission Settings

1. Expand  the **Search Engine Submission Settings** section.
2. If using a robots.txt file to provide instructions to search engines that crawl your site, set **Enable Submission to Robots.txt** to “Yes.”



*Search Engine Submission Settings*

3. When complete, tap **Save Config**.

## Search Engine Robots

The Magento configuration includes settings to generate and manage instructions for web crawlers and bots that index your site. The instructions are saved in a file called “robots.txt” that resides in the root of your Magento installation. The instructions are directives that are recognized and followed by most search engines.

By default, the robots.txt file that is generated by Magento contains instructions for web crawler to avoid indexing certain parts of the site that contain files that are used internally by the system. You can use the default settings, or define your own custom instructions for all, or for specific search engines. There are many articles online that explore the subject in detail.

### Example: Custom Instructions

#### Allows Full Access

```
User-agent:*  
Disallow:
```

#### Disallows Access to All Folders

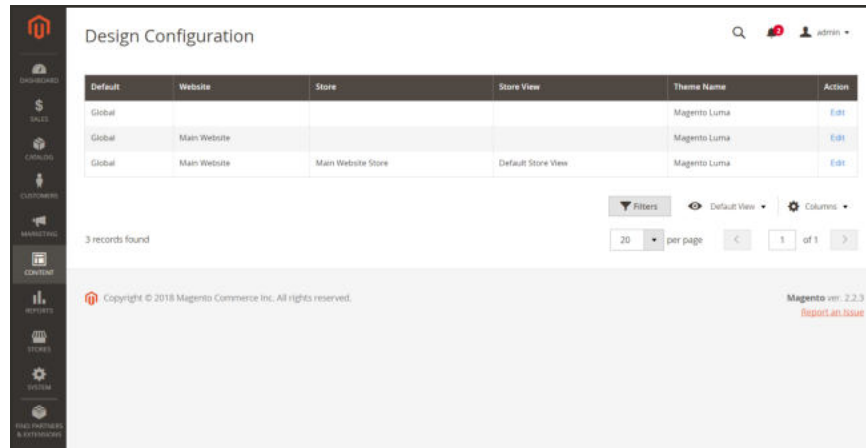
```
User-agent:*  
Disallow: /
```

#### Default Instructions

```
Disallow: /lib/  
Disallow: /*.php$  
Disallow: /pkginfo/  
Disallow: /report/  
Disallow: /var/  
Disallow: /catalog/  
Disallow: /customer/  
Disallow: /sendfriend/  
Disallow: /review/  
Disallow: /*SID=
```

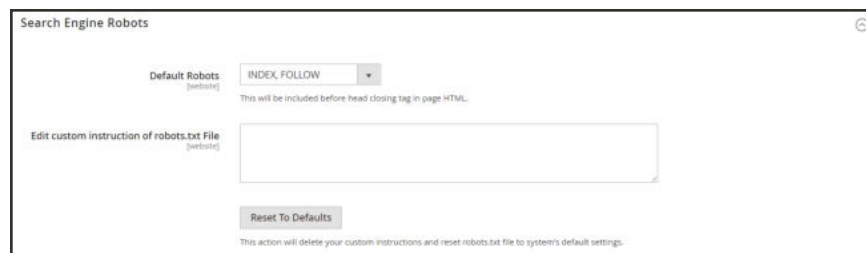
### To configure robots.txt:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the **Global** configuration in the first row of the grid, and click **Edit**.



*Global Design Configuration*

3. Scroll down and expand  the **Search Engine Robots** section. Then, do the following:



*Search Engine Robots*

- a. Set **Default Robots** to one of the following:

INDEX, FOLLOW	Instructs web crawlers to index the site and to check back later for changes.
NOINDEX, FOLLOW	Instructs web crawlers to avoid indexing the site, but to check back later or changes.
INDEX, NOFOLLOW	Instructs web crawlers to index the site once, but to not check back later for changes.
NOINDEX, NOFOLLOW	Instructs web crawlers to avoid indexing the site, and to not check back later for changes.

- b. If needed, enter custom instructions into the **Edit Custom instruction of robots.txt file** box: For example, while a site is in development, you might want to disallow access to all folders.

- c. To restore the default instructions, tap **Reset to Default**.

4. When complete, tap **Save Configuration**.

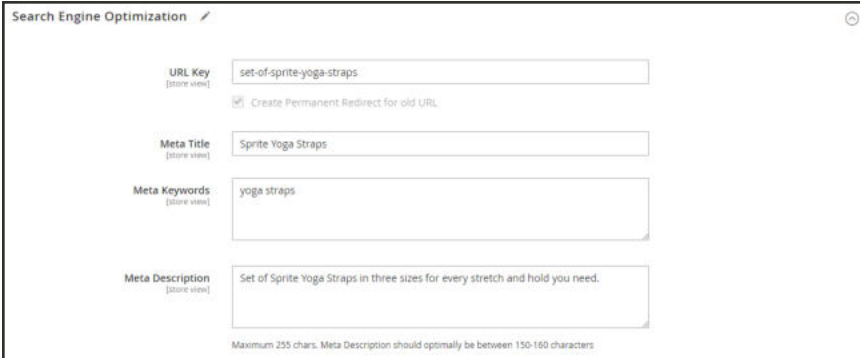
## CHAPTER 35:

# URL Rewrites

The URL Rewrite tool lets you change any URL that is associated with a product, category, or CMS page. When the rewrite goes into effect, any links that point to the previous URL are redirected to the new address.

The terms rewrite and redirect are often used interchangeably, but refer to slightly different processes. A URL rewrite changes the way a URL appears in the browser. A URL redirect, on the other hand, updates the URL that is stored on the server. A URL redirect can be either temporary or permanent. Your store uses URL rewrites and redirects to make it easy for you to change the URL key of a product, category, or page and preserve existing links.

By default, **automatic URL redirects** are enabled for your store. The "Create Permanent Redirect for old URL" checkbox is marked under the URL key field of each product.



Search Engine Optimization

URL Key [store view] set-of-sprite-yoga-straps

Create Permanent Redirect for old URL

Meta Title [store view] Sprite Yoga Straps

Meta Keywords [store view] yoga straps

Meta Description [store view] Set of Sprite Yoga Straps in three sizes for every stretch and hold you need.

Maximum 255 chars. Meta Description should optimally be between 150-160 characters

*Create Permanent Redirect for Old URL*

## Configuring URL Rewrites

URL rewrites make it possible to make existing URLs more “search engine friendly” and also easier for humans to read. Enabling Web Server Apache Rewrites is part of the initial Magento setup. Magento routinely uses URL rewrites to remove the file name “index.php” that normally appears in the URL just after the root folder. When Web Server Rewrites are enabled, the system rewrites each URL to omit “index.php.” The rewrite removes words that convey nothing of value to search engines or customers, and has no impact on performance or site rank.


### URL without Web Server Rewrite

```
http://www.yourdomain.com/magento/index.php/storeview/url-identifier
```

### URL with Web Server Rewrite

```
http://www.yourdomain.com/magento/storeview/url-identifier
```

### To configure URL rewrites:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand  the **Search Engine Optimization** section.

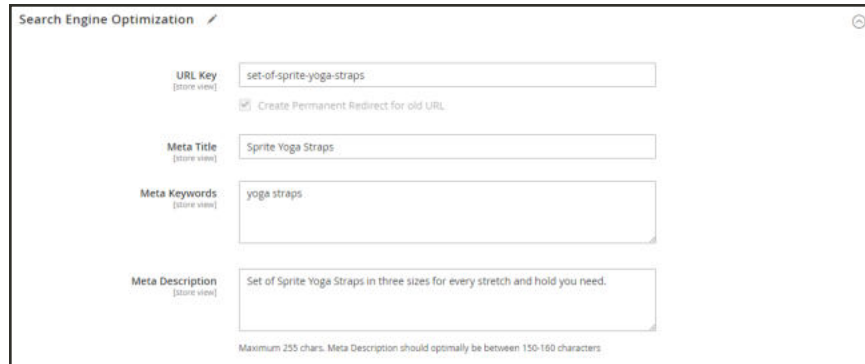


### *Search Engine Optimization*

4. Set **Use Web Server Rewrites** to your preference.
5. When complete, tap **Save Config**.

## Automatic Product Redirects

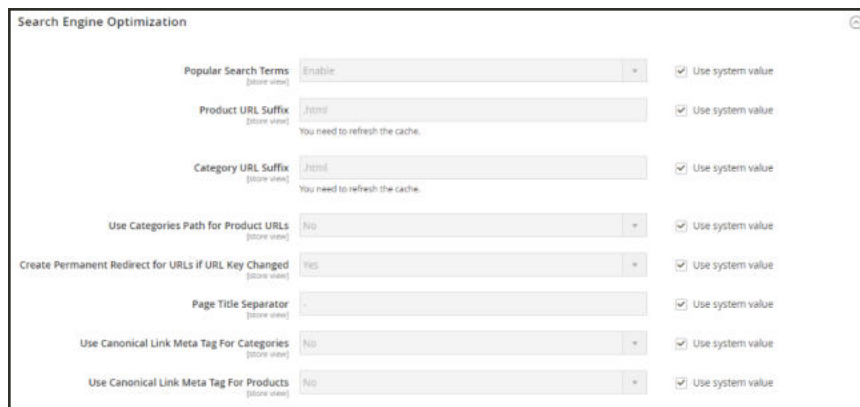
Your store can be configured to automatically generate a permanent redirect whenever the URL key of a product or category changes. In the Search Engine Optimization section, the checkbox below the URL key indicates if permanent redirects are enabled. If your store is already configured to automatically redirect catalog URLs, making a redirect is as easy as updating the URL key. The process to create an automatic redirect is the same for both products and categories.



*Create Permanent Redirect for Old URL*


### To set up automatic redirects:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, select **Catalog**.
3. Expand the **Search Engine Optimization** section.
4. Set **Create Permanent Redirect for URLs if URL Key Changed** to “Yes.”
5. When complete, tap **Save Config**.




*Search Engine Optimization*

### To automatically redirect product URLs:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find the product in the list, and click to open the record.
3. Expand  the **Search Engine Optimization** section. Then in the **URL Key** field, do the following:
  - a. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, follow the instructions to [enable automatic redirects](#).
  - b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
4. When complete, tap **Save**.
5. When prompted to refresh the cache, follow the links in the message at the top of the workspace. The permanent redirect is now in effect for the product and any associated category URLs.

### To automatically redirect category URLs:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. Find the category in the tree, and click to open the record.
3. Expand  the **Search Engine Optimization** section. Then in the **URL Key** field, do the following:
  - a. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, follow the instructions to [enable automatic redirects](#).
  - b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
4. When complete, tap **Save**.
5. When prompted to refresh the cache, follow the links in the message at the top of the workspace. The permanent redirect is now in effect for the category and any associated product URLs.

# Creating URL Rewrites

The URL Rewrite tool can be used to create product and category rewrites, and custom rewrites for any page in your store. When the rewrite goes into effect, any existing links that point to the previous URL are seamlessly redirected to the new address.

URL rewrites can be used to add high-value keywords to improve the way the product is indexed by search engines. You can also use rewrites to create additional URLs for a temporary seasonal change, or permanent change. Rewrites can be created for any valid path, including CMS content pages. Internally, the system always references products and categories by their ID. No matter how often the URL changes, the ID remains the same. Here are some ways you can use URL rewrites:

### System URL

`http://www.example.com/catalog/category/id/6`

### Original URL

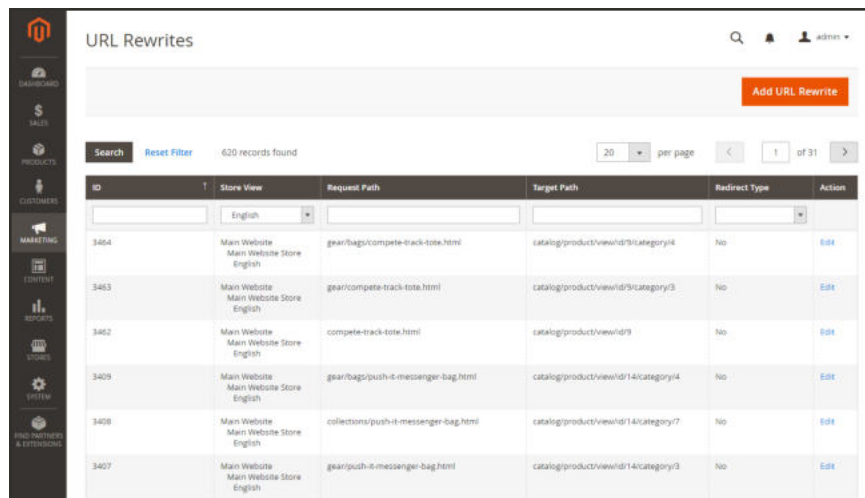
`http://www.example.com/peripherals/keyboard.html`

### Redirected Product URL

`http://www.example.com/ergonomic-keyboard.html`

### Additional Category URLs

`http://www.example.com/all-on-sale.html`  
`http://www.example.com/save-now/spring-sale`



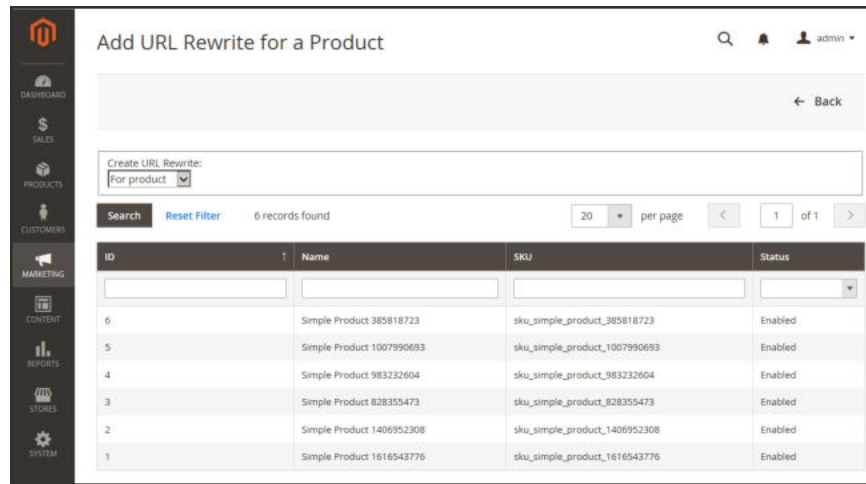
URL Rewrites



## Product Rewrites

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.

If **automatic redirects** are enabled for your store, there is no need to create a rewrite when a product **URL Key** is changed.



*Add URL Rewrite for Product*

**Process Overview:**

- Step 1. **Plan the Rewrite**
- Step 2. **Create the Rewrite**
- Step 3. **Test the Result**

### Step 1: Plan the Rewrite

1. To avoid mistakes, write down the "redirect to" path and "redirect from" path. The path includes the URL Key and suffix, if applicable.

If you're not sure, open each product page in your store, and copy the path from the address bar of your browser. When creating a product redirect, you can either include or exclude the **category path**. For this example, we create a product redirect without a category path.

#### Product with Category Path

Redirect to: gear/bags/impulse-duffle.html

Redirect from: gear/bags/overnight-duffle.html

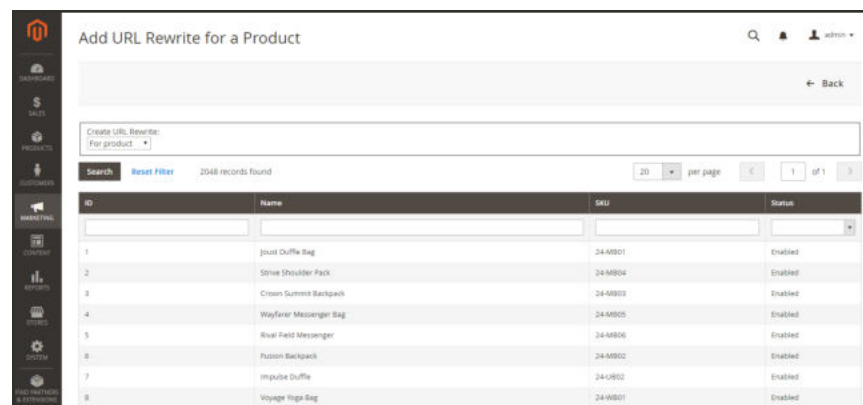
## Product without Category Path

Redirect to: `impulse-duffle.html`

Redirect from: `overnight-duffle.html`

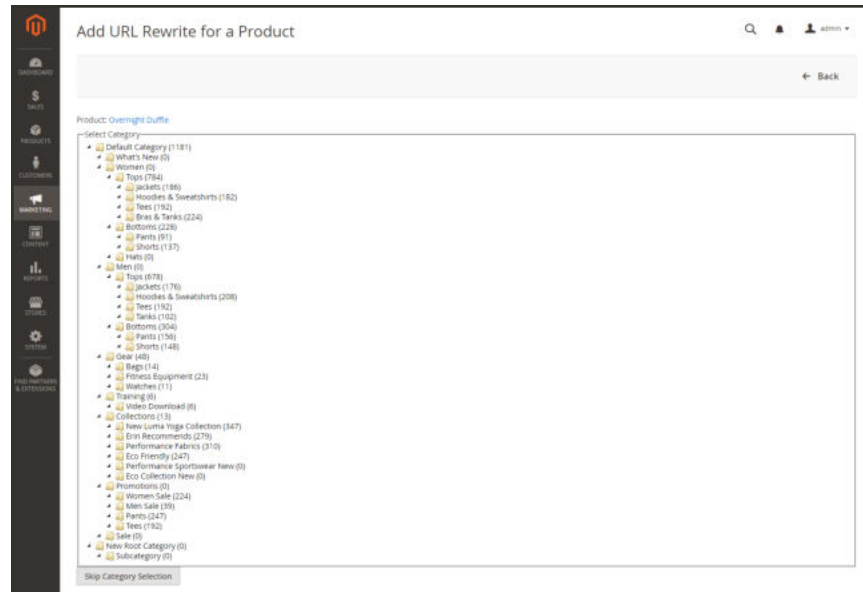
## Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **Search & SEO**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available.
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. In the upper-right corner of the URL Rewrites page, tap **Add URL Rewrite**.
4. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
5. Set **Create URL Rewrite** to "For product."
6. In the grid, find the product that is the target—or destination—of the redirect. Then, click the row.



*Add URL Rewrite for a Product*

7. Below the category tree, tap **Skip Category Selection**. For this example, the redirect does not include a category.



*Skip Category Selection*

The Add URL Rewrite for a Product page displays a link to the target in the upper-left corner, and the Target Path field displays the system version of the path, which cannot be changed. Initially, the Redirect Path field also displays the target path.

- a. If you have multiple store views, set **Store** to the view where the rewrite applies. Otherwise, a rewrite will be created for each view.
- b. In the **Request Path** field, type over the default entry, and enter the URL key and suffix—if applicable—of the original product request. This is the "Redirect from" product that you identified in the planning step.

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

- c. Set **Redirect Type** to one of the following:
  - Temporary (302)
  - Permanent (301)
- d. For your own reference, enter a brief **Description** of the rewrite.

Product: Overnight Duffie

URL Rewrite Information

Store: English

Request Path: impulse-duffie.html

Target Path: catalog/product/view?id=13

Redirect Type: Permanent (301)

Description: Redirect overnight.duffie.html to impulse-duffie.html

*URL Rewrite Information*

8. Before saving the redirect, review the following:
  - The link in the upper-left corner displays the name of the target product.
  - The Request Path contains the path for the original "redirect from" product.
9. When complete, tap **Save**.

The new product rewrite now appears at the top of the URL Rewrites grid.

URL Rewrites

You deleted the URL rewrite.

2861 records found

ID	Store View	Request Path	Target Path	Redirect Type	Action
3686	Main Website Main Website Store English	impulse-duffie.html	overnight.duffie.html	Permanent (301)	✕
3635	Main Website Main Website Store German	gear/watches/retro-analog-watch.html	catalog/product/view?id=20471&category=5	No	✕
3634	Main Website Main Website Store German	gear/retro-analog-watch.html	catalog/product/view?id=20471&category=3	No	✕
3633	Main Website Main Website Store German	retro-analog-watch.html	catalog/product/view?id=2047	No	✕

*URL Rewrite Saved*

### Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
  - Navigate to the original "redirect from" product request page.
  - In the address bar of the browser, enter the path to the original "redirect from" product immediately after the store URL. Then, press **Enter**.

The new target product appears instead of the original product request.

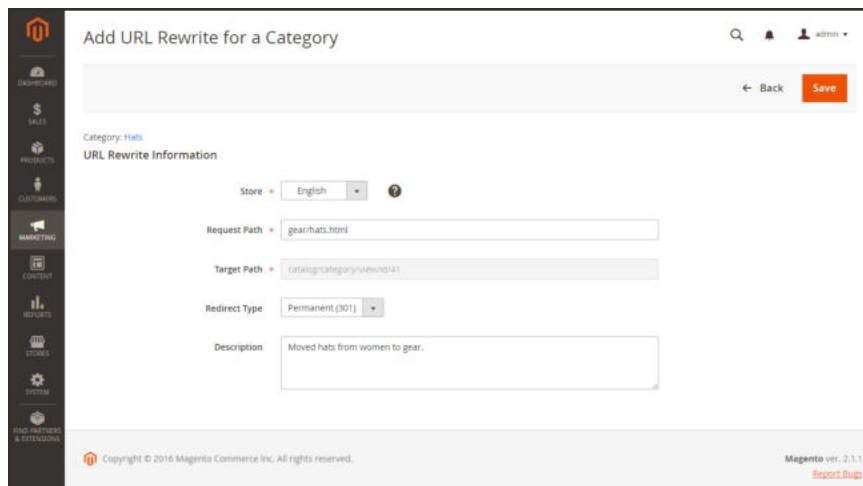
### Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	<p>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options:</p> <ul style="list-style-type: none"> <li>Custom</li> <li>For category</li> <li>For product</li> <li>For CMS page</li> </ul>
Request Path	<p>The product that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and category.</p> <p>The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.</p>
Target Path	<p>The internal path that is used by the system to point to the destination of the redirect. The target path is grayed out and cannot be edited.</p>
Redirect	<p>Determines the type of redirect. Options :</p> <ul style="list-style-type: none"> <li> <p>No</p> <p>No redirect is specified.</p> <p>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</p> </li> <li> <p>Temporary (302)</p> <p>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</p> </li> <li> <p>Permanent (301)</p> <p>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</p> </li> </ul>
Description	<p>Describes the purpose of the rewrite for internal reference.</p>

## Category Rewrites

If a category is removed from your catalog, you can use a category rewrite to redirect links to the URL of another category in your store. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.

If **automatic redirects** are enabled for your store, there is no need to create a rewrite when a category **URL Key** is changed.



*URL Rewrite for Category*

**Process Overview:**

- Step 1: **Plan the Rewrite**
- Step 2: **Create the Rewrite**
- Step 3: **Test the Result**

### Step 1: Plan the Rewrite

1. To avoid mistakes, write down the "redirect to" path and "redirect from" path. The paths should include the URL Key and suffix, if applicable.

If you're not sure, open each category page in your store, and copy the path from the address bar of your browser.

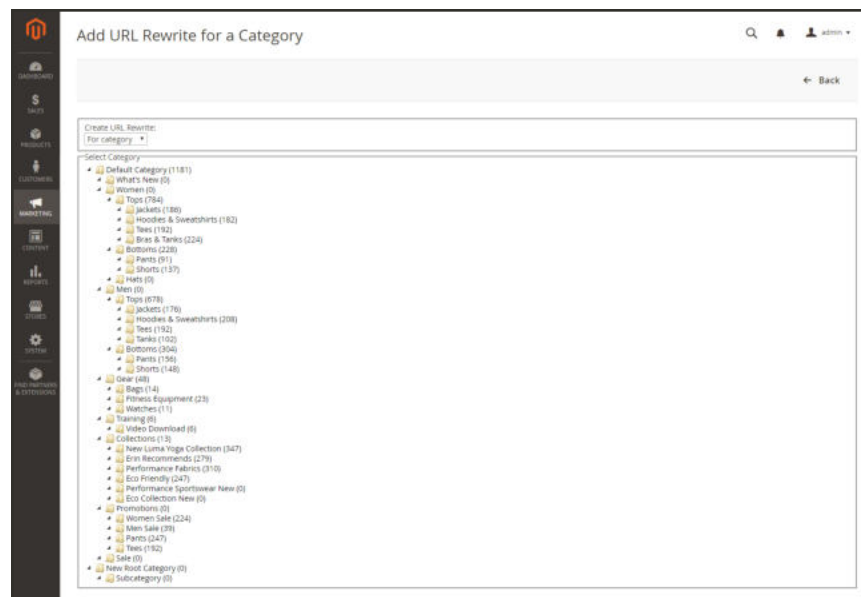
**Category Path**

Redirect to: gear/backpacks-and-bags.html

Redirect from: gear/bags.html

## Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available,
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the category that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to "For category." Then in the category tree, choose the target category that is the destination of the redirect.

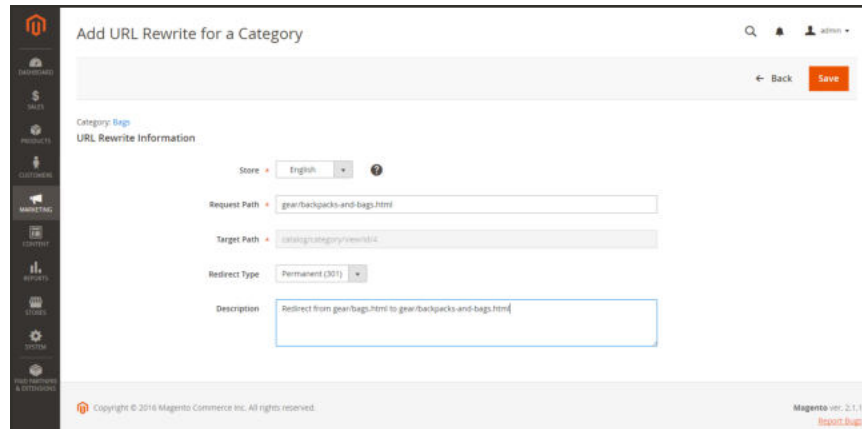


*Category Tree*

5. In the URL Rewrite section, do the following:
  - a. If you have multiple stores, select the **Store** where the rewrite applies.
  - b. In the **Request Path** field, enter the URL key of the category that the customer requests. This is the "redirect from" category.

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

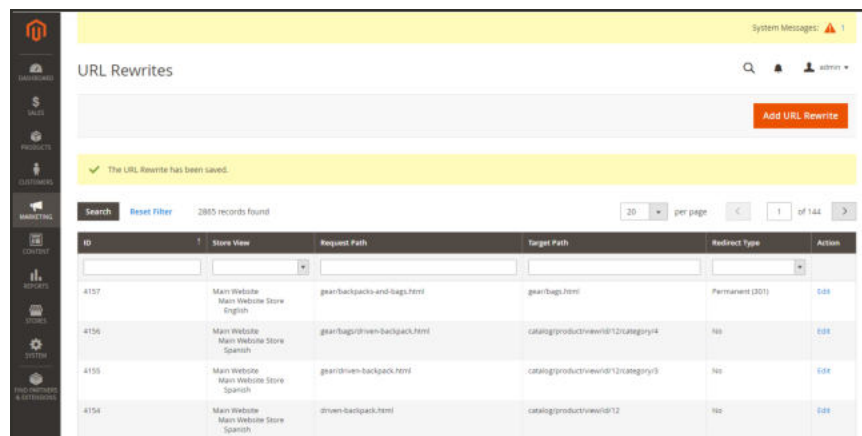
- c. Set **Redirect** to one of the following:
  - Temporary (302)
  - Permanent (301)
- d. For your reference, enter a brief description of the rewrite.



*Category Rewrite Information*

- 6. Before saving the redirect, review the following:
  - The link in the upper-left corner displays the name of the target category.
  - The Request Path contains the path for the original "redirect from" category.
- 7. When complete, tap **Save** button.

The new category rewrite appears at the top of the URL Rewrites grid.



*New Category Rewrite*



### Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
  - Navigate to the original "redirect from" category.
  - In the address bar of the browser, enter the path to the original "redirect from" category immediately after the store URL. Then, press **Enter**.

The new target category appears instead of the original category request.

### Field Descriptions

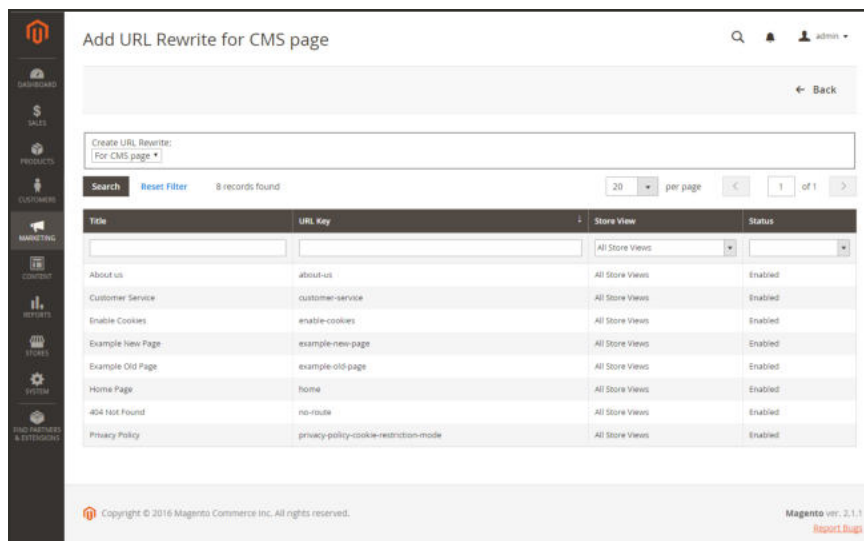
FIELD	DESCRIPTION
Create URL Rewrite	<p>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options:</p> <ul style="list-style-type: none"> <li>Custom</li> <li>For category</li> <li>For product</li> <li>For CMS page</li> </ul>
Request Path	<p>The category that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and parent category.</p> <p>The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.</p>
Target Path	<p>The internal path that is used by the system to point to the destination of the redirect. The target path is grayed out and cannot be edited.</p>
Redirect	<p>Determines the type of redirect. Options :</p> <ul style="list-style-type: none"> <li>No                             <ul style="list-style-type: none"> <li>No redirect is specified.</li> <li>Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</li> </ul> </li> </ul>

### Field Descriptions (cont.)

FIELD	DESCRIPTION
Temporary (302)	Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.
Permanent (301)	Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.
Description	Describes the purpose of the rewrite for internal reference.

## CMS Page Rewrites

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "source," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.



Add URL Rewrite

**Process Overview:**

- Step 1: Plan the Rewrite
- Step 2: Create the Rewrite
- Step 3: Test the Result

### Step 1: Plan the Rewrite

1. To avoid mistakes, write down the URL key of the "redirect to" page and "redirect from" page.  
If you're not sure, open each page in your store, and copy the path from the address bar of your browser.

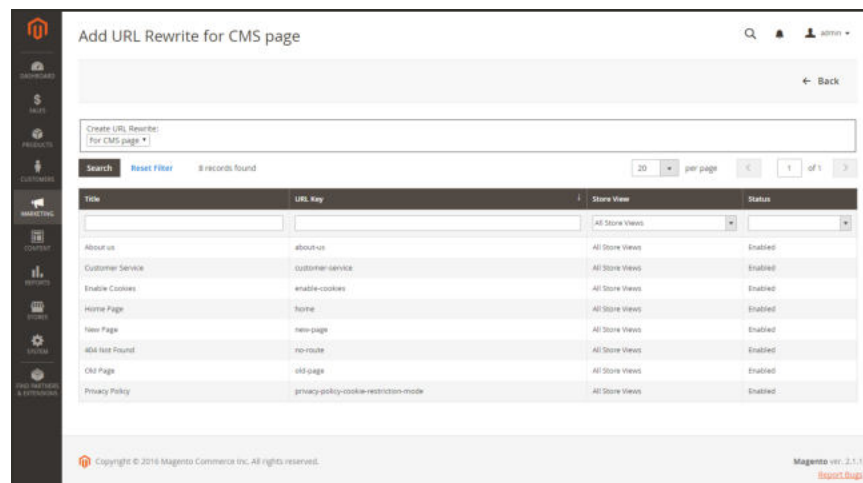
#### CMS Page Path

Redirect to:           new-page

Redirect from:       old-page

### Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available.
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to "for CMS page."
5. Find your new target page in the grid, and open in edit mode.



Custom URL Rewrite

6. Under URL Rewrite Information, do the following:
  - a. If you have multiple store views, select the **Store** where the rewrite applies.
  - b. In the **Request Path** field, enter the URL key of the original page that the customer requests. This is the "redirect from" page.

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

- c. Set **Redirect** to one of the following:
  - Temporary (302)
  - Permanent (301)
- d. For your reference, enter a brief description of the rewrite.

The screenshot shows the 'Add URL Rewrite for CMS page' configuration screen in the Magento Admin. The page title is 'Add URL Rewrite for CMS page'. Below the title, there is a 'CMS page: Example New Page' link and a 'URL Rewrite Information' section. The form contains the following fields:
 

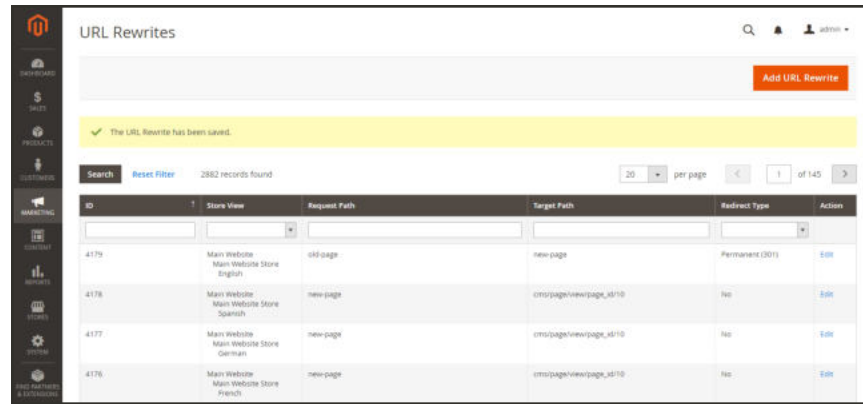
- Store:** A dropdown menu set to 'English'.
- Request Path:** A text input field containing 'example-old-page'.
- Target Path:** A text input field containing 'cms/page/view/page\_0010'.
- Redirect Type:** A dropdown menu set to 'No'.
- Description:** A text area containing 'Redirect to new page from old page'.

 At the top right of the form, there are 'Back' and 'Save' buttons. The footer of the page shows 'Copyright © 2016 Magento Commerce Inc. All rights reserved.' and 'Magento ver. 2.1.1 Report Bug'.

*Custom URL Rewrite*

7. Before saving the redirect, review the following:
  - The link in the upper-left corner displays the name of the target page.
  - The Request Path contains the path for the original "redirect from" page.
8. When complete, tap **Save**.

The new rewrite appears in the grid at the top of the list.



Saved URL Rewrite

### Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
  - Navigate to the original "redirect from" page.
  - In the address bar of the browser, enter the name of the original "redirect from" page immediately after the store URL. Then, press **Enter**.

The new target page appears instead of the original page request.

### Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom For category For product For CMS page
Request Path	The CMS page that is to be redirected. The Request Path must be unique, and cannot be in use by another redirect. If you receive an error message that the Request Path already exists, delete the existing redirect, and try again.
Target Path	The internal path that is used by the system to point to the destination. The target path is grayed out and cannot be edited.
Redirect	Determines the type of redirect. Options :

### Field Descriptions (cont.)

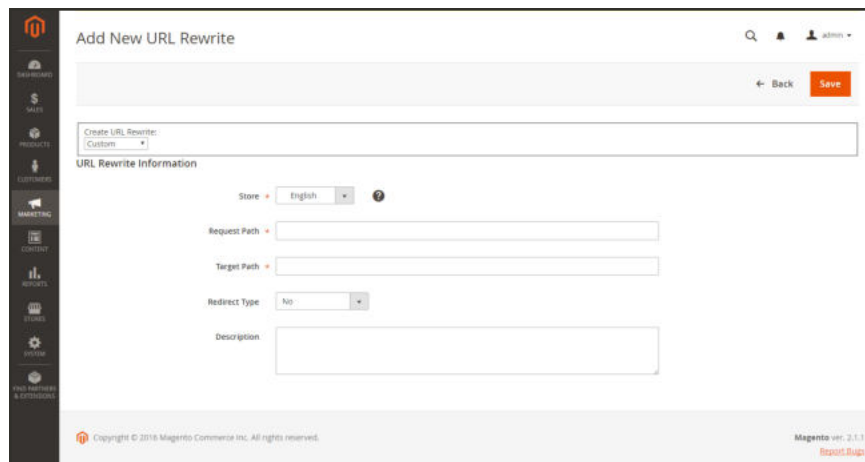
FIELD	DESCRIPTION
No	No redirect is specified.
Temporary (302)	Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.
Permanent (301)	Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.

**Description** Describes the purpose of the rewrite for internal reference.

## Custom Rewrites

A custom rewrite can be used to manage miscellaneous redirects, such as redirecting a page from your store to an external website. For example, you might have two Magento websites, each with their own domain. You can use a custom redirect to reroute requests for a product, category, or page to the other website. Unlike other redirect types, the target of a custom redirect is not chosen from a list of existing pages in your store.

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.



*Add URL Rewrite*

**Process Overview:**Step 1: **Plan the Rewrite**Step 2: **Create the Rewrite**Step 3: **Test the Result****Step 1: Plan the Rewrite**

1. To avoid mistakes, write down the URL of the "redirect to" page, and the URL key of the "redirect from" page.

If you're not sure, open each page, and copy the URL from the address bar of your browser.

**Custom Path**

Redirect to: `http://www.different-website.com/page.html`

Redirect from: `cms-page`  
`category.html`  
`category/subcategory.html`  
`product.html`  
`category/product.html`

**Step 2: Create the Rewrite**

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available:
  - a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
  - b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
  - c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to "Custom."
5. Under URL Rewrite Information, do the following:
  - a. If you have multiple store views, select the **Store** where the rewrite applies.
  - b. In the **Request Path** field, enter the URL key and path—if applicable—of the product, category, or CMS page that is to be redirected.

The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

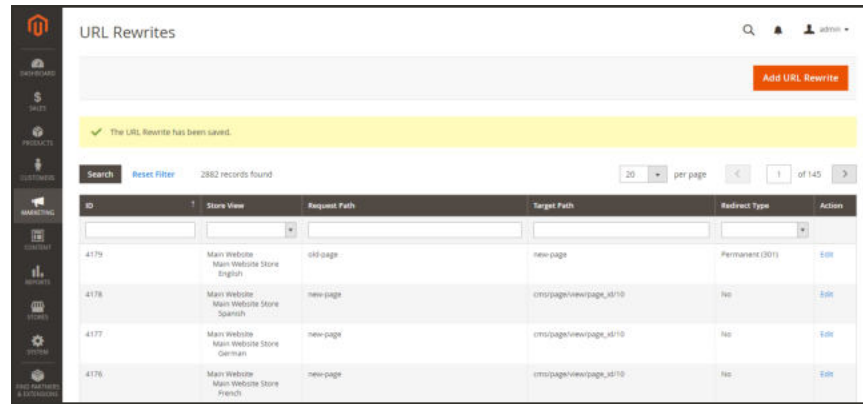
- c. In the **Target Path** field, enter the URL of the destination. If the target is located on another website, enter the fully qualified URL.
- d. Set **Redirect** to one of the following:
  - Temporary (302)
  - Permanent (301)
- e. For your reference, enter a brief description of the rewrite.

*Custom URL Rewrite*

6. Before saving the redirect, review the following:
  - The Request Path contains the URL key or path of the original "redirect from" page.
  - The Target Path contains the URL of the "redirect to" page.
7. When complete, tap **Save**.

The new rewrite appears in the grid at the top of the list.





Saved URL Rewrite

### Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
  - Navigate to the original "redirect from" page.
  - In the address bar of the browser, enter the name of the original "redirect from" page immediately after the store URL. Then, press **Enter**.

The new target page appears instead of the original page request.

### Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom For category For product For CMS page
Request Path	The path to the product, category, or CMS page that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix.  The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.
Target Path	The path or URL that is the destination of the redirect.
Redirect	Determines the type of redirect. Options :

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
No	No redirect is specified. Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.
Temporary (302)	Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.
Permanent (301)	Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.
Description	Describes the purpose of the rewrite for internal reference.





## CHAPTER 36:

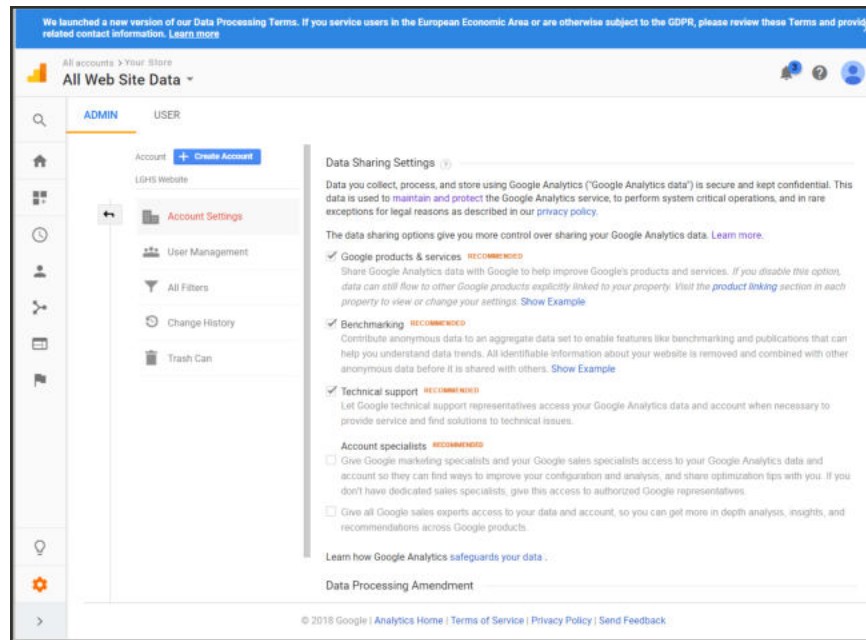
# Google Tools

Your store configuration is integrated with the following Google tools to help optimize your content, analyze your traffic, and connect your catalog to shopping aggregators and marketplaces.

- [Google Settings for GDPR](#)
- [Google Analytics](#)
- [Google Content Experiments](#)
- [Google AdWords](#)

## Google Settings for GDPR

If your business operates in areas that are governed by the **General Data Protection Regulation**, some of the default settings of **Google Analytics** must be modified to comply with the regulation. Follow these steps to ensure that your use of customer data remains in compliance with the GDPR.



*Google Data Sharing Settings*

### Step 1: Update Google Settings

1. **Sign in** to your company's **Google Analytics** account.
2. At the bottom of the left sidebar, choose **Admin**. Then, navigate to the account that you want to edit, if applicable.
3. In the **Account** column, click **Account Settings**. Then, adjust the following settings to support GDPR requirements:



## Turn Off Data Sharing

The default Google Analytics settings share your company data with Google and other parties. To turn off data sharing, remove the checkmark from the following settings:

- Google products & services
- Benchmarking
- Technical support
- Account specialists

## Accept the Data Processing Amendment

The Google Ads Data Processing Terms describe how Google processes data, and the measures it takes to ensure data security for business that are subject to the GDPR. A record of your legal entities and contact information is also maintained with the amendment. To [learn more](#), click the link in the message at the top of the page.

1. Scroll down the page to **Data Processing Amendment**. Then, tap **View Adjustment**.
2. Tap **Review Amendment** to read the **Google Ads Data Processing Terms**. Then, tap **Accept**.
3. To complete the DPA Administration details, click **Manage DPA Details**.
4. In the **Legal Entities** section, click **Edit** (  ). Then, do the following:
  - a. Enter the registered name(s) of your organization.
  - b. When complete, tap **Save**.
5. In the **Contacts** section, click **Add** (  ). Then, do the following:
  - a. Enter the information for the first contact. Then, mark the checkbox of each applicable role.
 

Primary Contact	(Notification Email Address) The contact to whom notices are sent.
Data Protection Officer	(If applicable) The person who is designated to facilitate GDPR compliance,
EEA Representative	(If applicable) The person who represents customers outside of the EU regarding their GDPR obligations.
  - b. When complete, tap **Add**.
  - c. Repeat to add a contact for each role, if applicable.
6. When complete, tap **Save**.

## Step 2: Modify Your Google JS Libraries

Google supports three JavaScript libraries to measure website usage, depending on the Google product: `gtag.js`, `analytics.js`, and `ga.js`. To meet GDPR requirements, the standard code must be modified to:

### Anonymize IP Addresses

1. To anonymize the IP addresses used by **Google Universal Analytics**, add the following snippet to the `analytics.js` library on your web server:

**analytics.js**

```
ga('set', 'anonymizeIp', true);
```

To learn more, see the [Analytics.js Field Reference](#).

If you use the legacy `ga.js` library, add the following snippet:

**ga.js**

```
ga('set', 'anonymizeIp', true);
```

2. To anonymize the IP addresses used by **Google Tag Manager**, set the `anonymize_ip` parameter to `true` in the `gtag.js` library on your web server,

**gtag.js**

```
gtag('event', 'your_event', { 'anonymize_ip': true })
```

To learn more, see: [IP Anonymization in Analytics](#) in Google Help.

## Force SSL

To force all Google data to be transmitted over a secure socket layer (SSL), add the following snippet to the `analytics.js` library on your web server.

`analytics.js`

```
ga('set', 'forceSSL', true);
```

## Step 3: Update Your Privacy Policy

Update your [privacy policy](#) to state that your company:

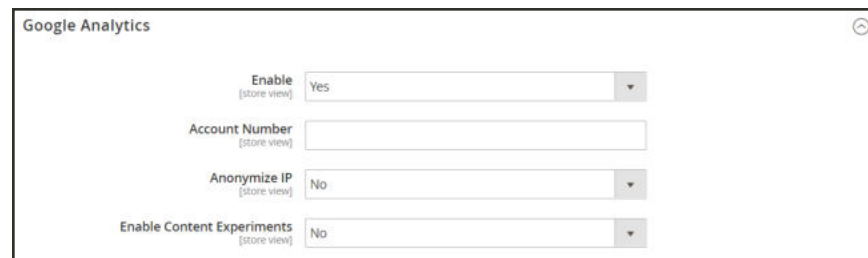
- Uses Google Analytics
- Masks IP addresses to hide personal information
- Has turned off Google Data Sharing
- Does not use other Google services in conjunction with Google Analytics cookies.



## Google Analytics

Google Universal Analytics gives you the ability to define additional custom dimensions and metrics for tracking, with support for offline and mobile app interactions, and access to ongoing updates.

If your business operates in areas that are governed by the [General Data Protection Regulation](#), see: [Google Settings for GDPR](#).



*Google Analytics*

### Process Overview:


Step 1: [Sign Up for Google Universal Analytics](#)

Step 2: [Complete the Magento Configuration](#)

### Step 1: Sign Up for Google Universal Analytics

Visit the Google website, and sign up for a [Google Universal Analytics](#) account. See Google's [Set up Site Search](#) and the [Google Analytics Guide](#) for the basics you need to get started.

### Step 2: Complete the Magento Configuration

1. Return to your store, and log in to the Admin. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Google API**.
3. Expand  the **Google Analytics** section. Then, do the following:
  - a. Set **Enable** to “Yes.”
  - b. Enter your Google Analytics **Account Number**.
  - c. If you want to conduct A/B testing and other performance tests on your content, set **Content Experiments** to “Yes.”
4. When complete, tap **Save Config**.

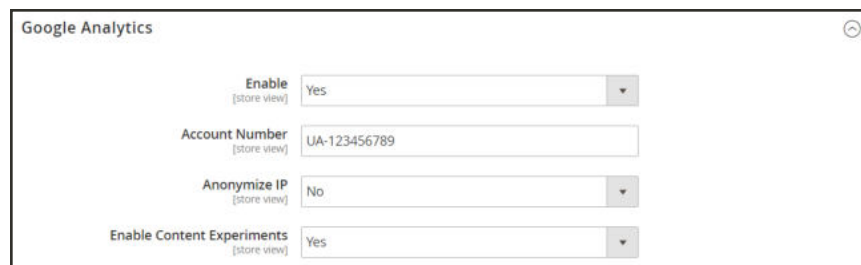
## Google Content Experiments

The following example shows how to set up an A/B test of products, categories, or content pages using Google Analytics Content Experiments. We recommend that you keep two browser tabs open while working through the instructions, because you will need to bounce back and forth between the Magento Admin and your Google Analytics account.

Google Content Experiments has been deprecated, and will eventually be replaced by [Google Optimize](#).

### Step 1: Enable Content Experiments (Magento)

1. Log in to the Admin of your Magento installation.
2. Follow the instructions to enable [Google Analytics](#) with Content Experiments in the Magento configuration.



#### *Enable Content Experiments*

### Step 2: Set Up the Variations (Magento)

Create multiple variations of the same product, category, or page.

- Each variation must have a unique [URL key](#).
- Each variation must have the same [store view](#) selected.

You can create up to ten variations of each entity that you want to test. For products, use [Save & Duplicate](#) to save time.

### Step 3: Set Up the Experiment (Google)

You must have the appropriate permissions to the Google account to create an experiment.

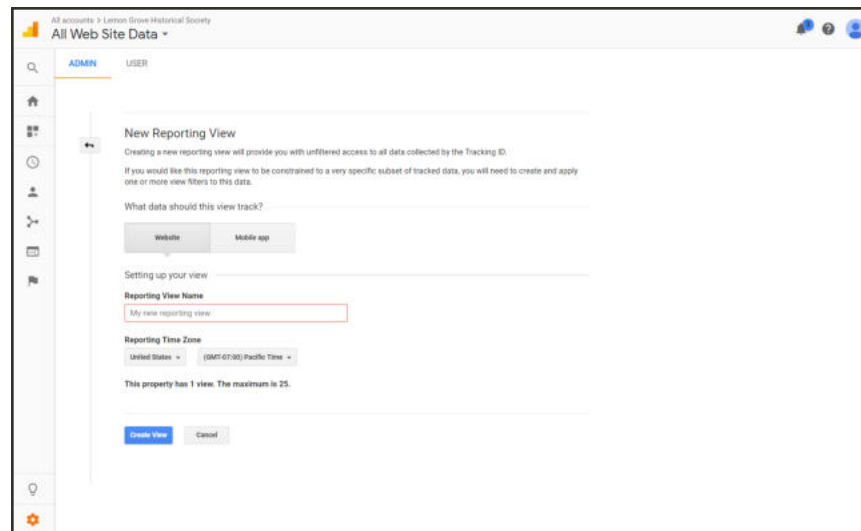
1. Open another browser tab, and log into your [Google Analytics](#) account. If necessary, navigate to the **Account** and **Property**.
2. In the sidebar on the left, choose **Admin**. Then, do one of the following:

## Choose an Existing View

In the header of the **View** column, click the **down arrow**, and choose the view that is to provide the data for the experiment.

## Create a New Reporting View

1. In the header of the **View** column, tap **Create View**. Then, do the following:
  - a. Identify the experiment location as one of the following:
    - Website
    - Mobile app
  - b. Enter a descriptive **Reporting View Name**.
  - c. Specify the **Reporting Time Zone**.
2. When complete, tap **Create View**. Then, click the back arrow to return to the previous page.



*New Reporting View*

3. In the panel on the left under **Reports**, choose **Behavior > Experiments**.
4. Tap **Create experiment**. Then, do the following:
  - a. Specify the percentage of traffic to redirect.
  - b. Specify the **Original Page URL** and the URLs of each **page variation** that you want to test.
  - c. Complete the other options. If you need help see: [.Configure & Modify Experiments](#).
5. When the experiment is set up, tap **Manually Insert the Code**. Then, copy the code snippet.

### Step 4: Paste Code Snippet (Magento)

1. Return to the Admin of your Magento installation. Then, open the original version of the product, category, or page in edit mode.
2. Expand the **View Optimization** section for the product, category, or page. Then, paste the code snippet that you copied from Google Analytics into the **Experiment Code** text box.

Do not paste the code snippet into any of the variations.

A screenshot of the 'Product View Optimization' interface. It features a title bar at the top left with the text 'Product View Optimization' and a close button at the top right. Below the title bar, there is a label 'Experiment Code' followed by a large, empty text input field. At the bottom of the input field, there is a small, faint note that reads 'Experiment code should be added to the original page only.'

#### *Product View Optimization*

3. When complete, tap **Save**.

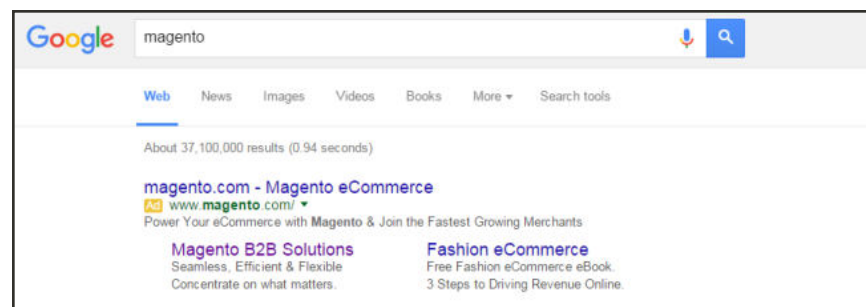
### Step 5: Review and Start the Experiment (Google)

1. Return to your **Google Analytics** account.
2. Review the experiment settings.
3. If ready to begin, tap **Start Experiment**. Otherwise, tap **Save for Later**.

## Google AdWords

**Google AdWords** is a service that you can use to place ads in Google Search results and on the pages of companies in the Google Display Network. The AdWords dashboard includes tools to manage your campaigns, track response, and measure results.

Conversion tracking shows how many ad clicks lead to a sale or other valuable action. The "Success" page that appears to your customer after an order has been submitted is used to track conversions because it appears only after a sale. After completing the Google AdWords configuration for your store, there is no need to copy the conversion tracking script to the "Success" page, because Magento already has the necessary information. To learn more, see [Google AdWords Help](#).



*Magento Ad in Google Search Results*

### Step 1: Create a Google AdWords Campaign

1. Visit [Google AdWords](#), and sign up for an account.
2. Follow the instructions to create a campaign.
3. To set up conversion tracking for your campaign, do the following:
  - a. On the **Tools** tab of your AdWords dashboard, choose **Conversions**. Then, tap **Conversion**.
  - b. When prompted for the conversion source, choose **Website**
  - c. Enter a name for the conversion action that you want to track. Then, tap **Done**.
  - d. Click **Value**. Then if applicable, assign a value to the conversion. For example,
    - If you make \$5 on each sale, choose "Each time it happens," and assign a value of \$5.
    - If the value of each sale varies, leave the value blank.
 Then, tap **Done**.
  - e. Tap **Conversion windows**, and complete the settings to determine how long the conversions are to be tracked, the reporting category, and attribution model.
4. When complete, tap **Save and Continue**.

## Step 2: Get Your Conversion Tag

1. Under **Install your tag**, choose to count conversions on **Page load**.
2. As an option, you can add the **Google Site Stats** notification to the conversion page. The notification appears in the lower corner with a link to Google's security standards and cookie usage.
3. To choose how you want to manage the your AdWords tag, do one of the following:
  - If you plan to add the script to your store yourself, choose **Save instructions and tag**.
  - If you plan to have someone else add the script to your store , choose **Email instructions and tag**.
4. When complete, tap **Done**.

## Step 3: Configure Your Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If configuring Google AdWords for a specific store view, do the following:
  - a. In the upper-left corner, choose the **Store View** that is to be configured.
  - b. When prompted to confirm scope switching, tap **OK**.
3. In the panel on the left, under **Sales**, choose **Google API**. Then, expand ☺ the **Google AdWords** section and do the following:
  - a. If necessary, clear the **Use Website** checkbox for each setting to be changed.
  - b. Set **Enable** to “Yes.”:
  - c. Enter the **Conversion ID** from your Google AdWords script.

The screenshot shows the Google AdWords configuration panel with the following settings:

- Enable:** Yes (dropdown),  Use system value
- Conversion ID:** (empty text input)
- Conversion Language:** English / English (en) (dropdown),  Use system value
- Conversion Format:** 2 (dropdown),  Use system value
- Conversion Color:** FFFFFFFF (text input),  Use system value
- Conversion Label:** (empty text input)
- Conversion Value Type:** Dynamic (dropdown),  Use system value
- Send Order Currency:** Yes (dropdown),  Use system value

### Google AdWords

#### 4. To format the Google Sites Stat notification, do the following:

- a. Set **Conversion Language** to the language that is identified in your Google AdWords script.
- b. Enter the **Conversion Format** to be used for the Google Sites Stat notification on the conversion page.
  - 1 Displays a one-line notification with a link to more information about Google tracking.
  - 2 Displays a two-line notification with a link to more information about Google tracking.
  - 3 Displays no customer notification.
- c. Enter the **hexadecimal code** for the **Conversion Color** that you want to use for the Google Site Stats notification label.
- d. Enter the encrypted text for the **Conversion Label** that appears on the Google Sites Stat notification.

For example: MIEYCOKBnGoQz6CZoAM

#### Sample Google AdWords Tag Code

```
<!-- Google Code for Back to School Sale Conversion Page -->
<script type="text/javascript">
/*  */
var google_conversion_id = 999999999;</pre>
</div>
<div data-bbox="70 942 103 959" data-label="Page-Footer">705</div>
<div data-bbox="661 942 909 960" data-label="Page-Footer">Magento Open Source User Guide</div>
```

```

var google_conversion_language = "en";
var google_conversion_format = "3";
var google_conversion_color = "ffffff";
var google_conversion_label = "M1EYCOKBnGoQz6CZoAM";
var google_remarketing_only = false;
/* ]]> */
</script>
<script type="text/javascript"
src="//www.googleadservices.com/pagead/conversion.js">
</script>
<noscript>
<div style="display:inline;">

</div>
</noscript>

```

5. Set **Conversion Value Type** to one of the following:

Dynamic	Determines that a conversion has occurred based on the dynamic Order Amount value.
Constant	Determines that a conversion has occurred based on a specific value entered.

For a Constant conversion value type, enter a specific **Value** for the Order Amount to qualify as a conversion.

6. When complete, tap **Save Config.**

#### Step 4: Verify the Configuration

Within a few hours, the tracking status in your Google AdWords dashboard changes from "Unverified" to "No recent conversions" or "Recording conversions." When someone clicks your ad and makes a purchase, the conversion appears on the Conversion Actions page of your dashboard and campaign report.



# CHANNELS

## Contents

In this section of the guide, you'll learn how Magento advertising channels can simplify and centralize your ad campaign management and sales channels can integrate your product catalog, orders, shipments, and store configurations. These powerful features empower you to increase revenue by capturing new storefront traffic and expanding sales to additional webstores.

**Google Shopping ads Channel**

**Amazon Sales Channel**



## CHAPTER 37: Google Shopping ads Channel

Simplify your Google promotions and ad campaign management by integrating your Magento catalog with Google through Magento's Google Shopping ads. This extension syncs your Magento product catalog and other information with your Google Merchant Center (GMC) and Ads accounts to promote and sell products. When you have integrated your Magento catalog, you can manage your GMC catalog and publish Google Smart Shopping ads campaigns directly from Magento.

This guide provides insights to Google accounts, onboarding, managing your catalog, and developing campaigns. See the following sections to install, onboard, and start selling with Google.

**?** **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.



### Getting Started with Google Shopping ads Channel

---

Google Shopping ads Channel integrates Google Merchant Center, Google Ads, and your Magento catalog to advertise and sell products. Learn more about installing the extension, FAQs, terms, workflows, best practices, and more.



### Onboarding Google Shopping

---

Set up and configure all accounts and integrate with Google following the onboarding process. The process walks through creating all accounts, syncing products, and creating your first Smart Shopping ad campaign.



## Managing Google Accounts

---

Review and manage your Google account errors and settings. You must resolve any account issues to create and sell through campaigns.



## Managing Google Products

---

Review and manage synced products with Google. All synced products save to a Google product catalog with a status of approved or disapproved. Products must be approved to display in ads.



## Managing Ad Campaigns

---

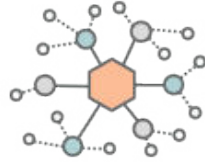
Magento supports only Google Smart Shopping campaigns, allowing you to create and manage campaigns directly through the Admin.

# Getting Started with Google Shopping ads Channel

Google Shopping ads empowers you to expand business and revenue by capturing traffic that actively sees products through searches. As Google provides search results, any products you promote through Smart Shopping Ads also display to corner markets and drive sales.

Customers enter your storefront by clicking on product listings including images, names, prices, and more.

To simplify creating and managing products and campaigns with Google, you just need to understand the following concepts and complete a few onboarding steps. This section helps you get started quickly.



## About GMC and Ads with Magento

---

Learn more about Google Merchant Center and Google Ads accounts, products, campaigns, and more. These are the key accounts used to integrate Magento and Google.



## About Google and Magento Attributes

---

Learn more about Magento and Google product catalogs, product reviews, approvals, disapprovals, and more.



## Best Practices for Google Shopping ads Channel

---

Find out the best practices, tips, tricks, and recommendations for all aspects of Magento and Google integration settings, product catalogs, campaigns and much more.

# About GMC and Ads with Magento

The Google Shopping ads integration leverages Google Merchant Center (GMC) and Google Ads accounts with your Magento product catalog. Learn more about these accounts, how they work, and the integrations with Magento. We simplify the entire process for syncing product data, creating ads, and managing everything through a single integration. For more information, also look through the [Google Shopping FAQs](#) and [Best Practices for Google Integrations](#).

**?** **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

## Google Merchant Center

The **GMC** is a platform to import and manage product data with Google, capable of integrating with Google Ads. To advertise and sell through Google you must complete a series of steps. Magento resolves these complicated steps with an [onboarding process](#) and management tools within the Magento Admin.

- Onboard in a single process to import and map product data with Google attributes to best match product searches and advertisements to conditions, age groups, product types, and more
- Review and manage Google approvals for products and accounts
- Manage products including disapprovals, prices, promotions, updates, and more

### Catalogs and Syncing

Google Shopping ads Channel leverages your Magento product catalog, syncing product data and configured attributes directly with Google. We take the guesswork out of mapping to Google attributes, allowing you to select from existing attributes, using Google attributes, or adding new Magento attributes for various categories including product type, condition, age group, gender, and more.

Syncing at regular intervals each day, Magento checks for any issues with your account and products, listing disapprovals and reasons through the dashboard. Click, review, and update required product data changes to kick off Google reviews for new approvals. As you make changes to product data, quantities, and prices, we sync those updates to Google on save. Updates should display on Google within an hour of saving in Magento.

By default, your GMC account can support 150,000 total line items in your product feed and countries. For example, if you sell and promote a product across three countries, the total number counts against your total. If you exceed this quota, you will receive an account error of too many products. Magento cannot extend or affect this quota. To increase your limit, [contact Google with this form](#).

You only need to access GMC for advanced configurations including shipping and taxes. Manage all products, settings, and reports through the Magento Admin.

### Terms and Concepts

- *Claim and Verify*: Google must verify and claim your storefront URL to associate it to your GMC account. *Verifying* adds markers to your site for Google to locate and confirm that you are the authorized owner of both your website and your Merchant Center account. *Claiming* reserves the URL you verified for use with your Merchant Center account. URL status includes "Claimed and Verified" and "Unclaimed".
- *Approval and Disapproval*: Google marks products as approved if they pass all [product](#) and [policy](#) requirements. Products have the *Pending Approval* status until reviewed. Disapproved products have an issue that must be resolved and submitted for another review. Approved products can be searched and displayed through Google.
- *Attributes*: Google uses attributes as a form of mapping imported Magento product data. Magento [attributes](#) can be mapped to these Google attributes to ensure Google properly uses your product data. For details on attributes, see Google's [Product data specification](#). If you select to create a new attribute during the onboarding process, it is named Google Merchant Center Category.

Site URL	Google Store Name	GMC Accounts ID	Claim Status	Account Status	Products Status	Actions
https://www.janestore.com	Jan's	133799	✓ Claimed and Verified	✗ Disapproved	✗ Disapprovals	<a href="#">View Details</a>
https://www.jackstore.com	Jack's	656783	✓ Claimed and Verified	✓ Approved	✓ All Approved	<a href="#">View Details</a>
https://www.jillstore.com	Jack's	789034	✓ Claimed and Verified	✗ Disapproved	✗ Disapprovals	<a href="#">View Details</a>
https://www.jimstore.com	Jim's	895678	✗ Unclaimed	○ Pending Approval	✗ Disapprovals	<a href="#">View Details</a>

*GMC account tracking and information in Google Shopping ads*

## Google Ads

**Google Ads** provides an online advertising program to sell your products through Google. The account and tools support multiple types of ads to target networks, keywords, and search results with the best matching products. Magento Google Shopping ads Channel supports only a Smart Shopping Ads campaigns, integrating your GMC products with advanced Google systems to create and test different product asset and information combinations as relevant ads across Google networks. The system tracks performance of ads based on responses and click-throughs, regulating your advertisements per an allocated daily budget.

Simplify your ad campaign management, increase your sales, and expand your reach with Smart Shopping campaigns. Smart Shopping campaigns combine elements of your existing product feed and assets with Google's machine learning to show a variety of ads across different ad networks. Networks include the Google Search Network, the Google Display Network, YouTube, and Gmail. Smart Shopping campaigns feature both Product Shopping ads and display ads (including Remarketing Ads and Similar Audiences).

### Smart Shopping campaigns

Smart Shopping campaigns are easy to use. Simply link to a GMC account, set a budget, confirm the country of sale, and select products. Google systems use your approved products and test different combinations of product image and text, then show the most relevant ads across Google networks. To help you get the best value from each ad, Google automates ad creation, ad placement, and bidding to maximize sales at your given budget.

Smart Shopping campaigns provide the following key benefits:

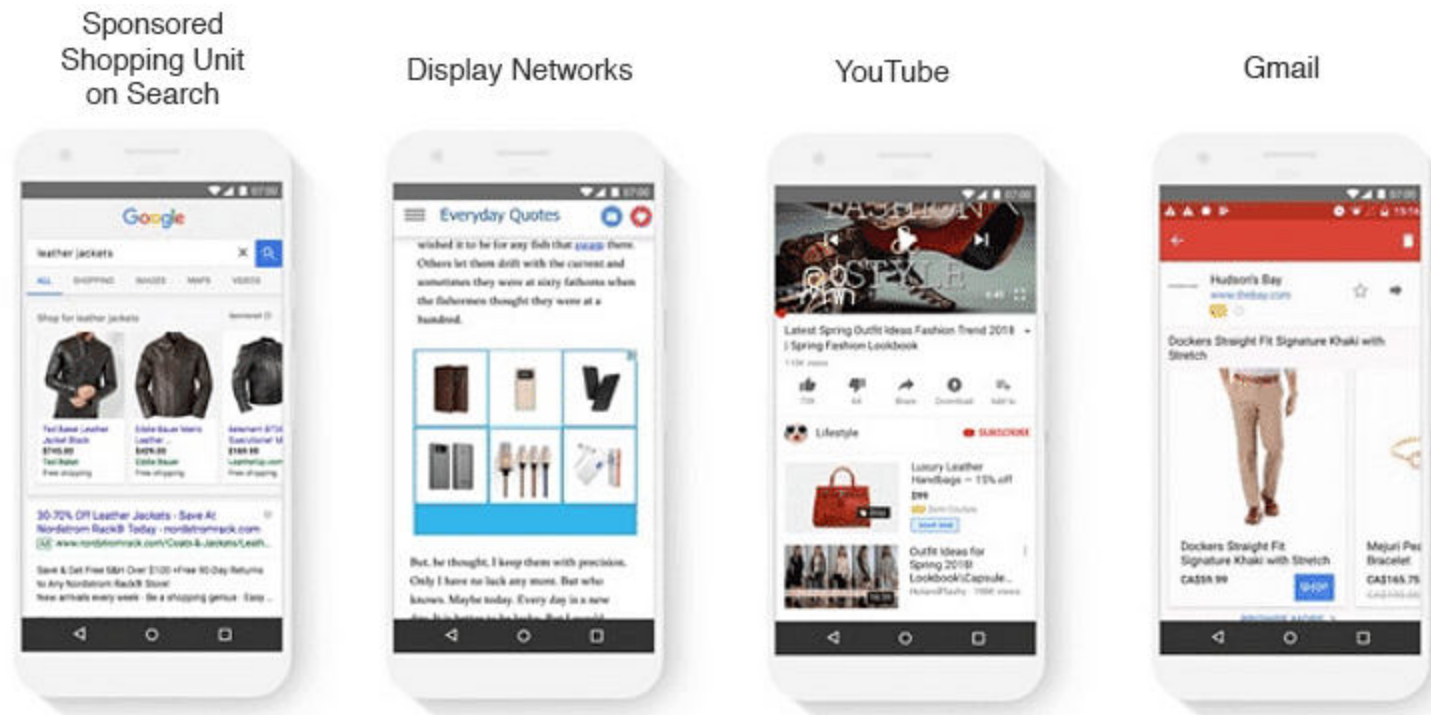
- Aligned to your marketing objective by focusing on increasing sales for your budget.
- Improve cost efficiency by fully automating bidding so you can focus more time on strategic tasks.
- Cross-channel optimization that ensure your budget is spent optimally across the Google Search Network, Display networks, and YouTube

Magento supports creation and management of Smart Shopping campaigns. Easily create and manage your Smart Shopping campaigns directly through the Magento Admin:

- Advertise across the globe by selecting countries from the list. Google displays ads for those locations, displaying translated product data if those locales are configured and translated in your catalog.

- Set a daily budget to define an average amount for advertising spending per campaign
- Select all products or a filtered group to display in ads. As products sync and approve with GMC, they also display as part of the campaign if they match the parameters.
- Track ad performance, costs, conversions, and status through the dashboard
- Create, pause, and end campaigns without scheduling. Manually create, pause, and end campaigns as needed.

You only need to access Google Ads to configure your payment method. Access and review all ads, settings, and reports through the Magento Admin.



### Terms and Concepts

- **Shopping Ads:** An ad displaying your rich merchant data including product name, image, link, description, price, and more.
- **Campaign:** Method of managing and customizing ads. Magento supports Smart Shopping campaigns.
- **Timezone:** Setting for your Ads account that determines the timezone for Google reporting.
- **Currency:** Setting for your Ads account that determines the currency used to set budgets for your ads and shows in reporting.
- **Budgets:** Your ad campaigns have a daily budget that sets the average maximum amount you want spend for displaying and promoting the Smart Ads per day. Google has intelligent tracking and algorithms to evaluate the popularity of your products, ad displays and click-



throughs, and much more. If an ad is popular with significant click-throughs, Google may promote the ad more, possibly spending more of your budget. The amounts balance, never exceeding your average, and rolling over amounts not spent from one day to the next.

- **Status:** The status indicates if your campaign is running ads, is available, or ended. Google supports a number of ad status options. Magento supports a specific set: Active (ads able to run), Paused, Ended (no longer running).
- **Launch Date:** The date the campaign was submitted and started in Magento. When ended, the date clears.

Campaign Name	GMC ID	Products	Daily Budget	Cost	Clicks	Conversions	Conversion Value	Launch Date	Status	Actions
Summer Fashion	763456	344	\$500	\$198	57	14	\$377	07/02/2018	Active	Select +
Discount All	656783	875	\$1500	\$250	111	53	\$4753	07/02/2018	Active	Select +
Swimwear Promo	789034	56	\$200	\$87	78	42	\$434	—	Ended	Select +
Activewear Sale	895678	73	\$100	\$110	210	57	\$3235	07/02/2018	Paused	Select +
Maxi Dresses	027354	22	\$50	\$44	45	24	\$123	—	Ended	Select +
Waterbottles	020120	1500	\$125	\$100	222	78	\$1037	—	Ended	Select +
Coats Sale	017640	84	\$640	\$500	12	31	\$234	07/02/2018	Paused	Select +
Sweaters Sale	015441	27	\$720	\$430	19	21	\$768	—	Ended	Select +

*Google Ads campaign tracking in Google Shopping ads Channel*

## Onboarding Process

We provide an onboarding process, walking you through the steps to create and configure accounts much like a wizard. Each screen will prompt you for specific information with helpful tips. For complete details, see the [Onboarding Google Shopping ads](#). After you complete onboarding, continue managing your account and products during the approval process. The Google Shopping ads dashboard and details pages keep you informed with options to review and resolve issues as notified by Google.



# Account Creation

# Ads Account Cre

## Google Approval Process

When you complete the onboarding step for the GMC account, Google begins receiving and reviewing your products. These reviews verify your product data according to Google guidelines, and against your storefront posted products. The review requires passing Google [product](#) and [policy](#) requirements.

For details, see [About Google and Magento Catalogs](#).

## About Google and Magento Attributes

Your Magento catalog includes all products and associated settings (images, options, prices, and more) that populate and sell through your storefront(s). The integration with Google Shopping ads Channel pushes your entire Magento catalog to GMC. Use filters to set the products for ads.

The integration supports all Magento product types excluding gift cards, grouped products, and simple products with required options. Google also recommends not selling products requiring customization or personalization.

**?** **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

## Google Shopping ads Channel Dashboard

The dashboard provides detailed lists of your GMC accounts, Google Ads, and options to add more accounts and campaigns. Control your accounts, products, and campaigns from one screen.

If you have additional steps to complete, banners display with information and next steps. See each section to review and manage your GMC account, product updates, and campaign status.

The screenshot displays the Google Shopping ads Channel Dashboard. At the top, there are navigation buttons for 'Settings', 'Create GMC Account', and 'Create Ad Campaign'. Below this, the 'All Ad Campaigns' section shows a summary for the last 14 days (Mar 22 - Apr 5, 2019) with metrics: Cost (\$45,000), Return on Ad Spend (ROAS) (\$2.33), Conversion Value (\$10,970), and Conversions (27). A table below lists individual campaigns with columns for Campaign Name, GMC ID, Products, Daily Budget, Cost, Clicks, Conversions, Conversion Value, Launch Date, Status, and Actions. The table includes campaigns like 'Summer Fashion', 'Discount All', 'Swimwear Promo', 'Activewear Sale', 'Maxi Dresses', 'Waterbottles', 'Coats Sale', and 'Sweaters Sale'. Below the campaigns table is the 'GMC Accounts' section, which includes a table with columns for Site URL, Google Store Name, GMC Accounts ID, Claim Status, Account Status, Products Status, and Actions. This table lists accounts for 'Jane's', 'Jack's', and 'Jim's' with their respective statuses.

Google Shopping ads Channel Dashboard

## Mapping Product Data

When you complete the **onboarding process** to add Google Merchant Center and Ads accounts, you **map Google attributes** with your Magento catalog attributes. The mappings help provide data from your Magento products into a synced Google product catalog.

If you do not have custom Magento attributes, you may add Magento attributes and values or select the best matching Google attributes. Any Google values selected and configured do not save back into your Magento catalog.

GOOGLE ATTRIBUTE	MAGENTO ATTRIBUTE	DESCRIPTION
Title	Product Name (default)	The name of your product.
Description	Description (default)	The full <b>Description</b> block for your product.
Google Product Category	Custom attribute	Google supports a product category for each product. Categorizing your product helps ensure that your ad is shown with the right search results. If you do not use category attributes in Magento, select the best matching Google <b>category</b> .
Product condition	Custom attribute	Attribute(s) specifying conditions such as new, used, repaired, refurbished, mint, like new, etc. Google only recognizes New, Used, and Refurbished. If all of your products have one product condition, select a Google attribute best matching that condition (like New). Or map your Magento condition attribute values to Google attributes.
GTIN Global Trade Item Number	Custom attribute	This is the Global Trade Item Number typically assigned by manufacturers to a product. Depending on your product, you may receive a different type of GTIN including UPC, EAN, JAN, ISBN, or ITF-14. To find your GTIN, see Google's <b>Find a GTIN</b> . For this option, select the type of GTIN or none if you do not have an assigned value. If you do not have a GTIN, you may have an MPN.
MPN Manufacturer Path Number	Custom attribute	This is the Manufacturer Part Number typically assigned if your product does not have a GTIN. For details, see Google's <b>mpn: Definition</b> . If your products do not have a MPN, select none.

#### APPAREL AND ACCESSORIES ATTRIBUTES

#### ADULT-ONLY CONTENT ATTRIBUTES

#### PRICES (AUTOMATICALLY SUPPLIED BY SYSTEM)

GOOGLE ATTRIBUTE	MAGENTO ATTRIBUTE	DESCRIPTION
Brand	Custom attribute	<p>The specific brand of your products. If you sell products manufactured by other companies, you may have assigned the brand for categories, searches, and layered navigation.</p> <p>Google requires this attribute for all new products except those in these categories: movies, books, musical recording labels, custom and custom-made items such as t-shirts and novelty products. For examples and best practices, see Google's <a href="#">brand: Definition</a>.</p>
Identifier exists	Custom attribute	<p>Attribute(s) that identify any new products without a gtin and brand or mpn and brand. For details, see Google's <a href="#">identifier_exists: Definition</a>.</p>

#### APPAREL AND ACCESSORIES ATTRIBUTES

Age	Custom attribute	<p>Attribute(s) specifying age groups, such as kids, adults, etc. Google recognizes the following age groups: Newborn, Infant, Toddler, Kids, and Adults. For details, see Google's <a href="#">age_group: Definition</a>.</p>
Gender	Custom attribute	<p>Attribute(s) specifying gender for products. Google recognizes unisex, male, and female. For details, see Google's <a href="#">gender: Definition</a>.</p>
Color	Custom attribute	<p>Attribute(s) specifying colors for products. Some catalogs use attributes with swatches to specify colors. Google supports solid colors like red, white, blue, green, yellow, etc. For details, see Google's <a href="#">color: Definition</a>.</p>
Size	Custom attribute	<p>Attribute(s) specifying sizes either in text (large, medium, small) or numerical (10, 9.5, 9). Depending on your products, these sizes can differ or include both text and number. For details, see Google's <a href="#">size: Definition</a>.</p>

#### ADULT-ONLY CONTENT ATTRIBUTES

Adult only	Custom attribute	<p>Attribute(s) indicating the product is or is not adult-</p>
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#### PRICES (AUTOMATICALLY SUPPLIED BY SYSTEM)

GOOGLE ATTRIBUTE	MAGENTO ATTRIBUTE	DESCRIPTION
<b>APPAREL AND ACCESSORIES ATTRIBUTES</b>		
<b>ADULT-ONLY CONTENT ATTRIBUTES</b>		

oriented. Selling Adult-Only products not correctly listed without proper attributes may cause your products or account to be disapproved. For details, see Google's [adult: Definition](#) and policies on [Adult-oriented content](#).

**PRICES (AUTOMATICALLY SUPPLIED BY SYSTEM)**

oriented. Selling Adult-Only products not correctly listed without proper attributes may cause your products or account to be disapproved. For details, see Google's

Sales Price	Final Price	
		The final price calculated in the Magento catalog including discounts. Due to complex nature of Magento pricing, we use this price to map to Google Sales Price. This value is automatically supplied from Magento to Google.

### Syncing Products to Google

Your product data syncs from your Magento product catalog into the Google product catalog during onboarding and as you save product updates.

- All attributes map and set the data Google saves into its catalog and displays in ads.
- Google allows you to sync and sell up to 150,000 total line items in your product feed and countries. For example, if you sell and promote a product across three countries, the total number counts against your total. If you attempt to sell more than 150,000 unique products, Google will disable and reduce the number of active products available. To increase your limit, [contact Google with this form](#).
- While products are waiting to be approved, they have a Pending Approval status.
- The initial push of data to Google completes in waves, mapping and collecting for review. The process of validation and approval takes much more time. The complete process of product data and review **can take up to 10 days** to complete for larger product catalogs.
- After products are received and approved in your Google product catalog, any updates in mapped attributes, quantity, price, and availability (in-stock/out-of-stock) are received and posted within an hour. Every save of product data in the Magento Admin is collected and synced to Google using a cron job (added as part of the extension).

- If you save price changes to products, or remove products, Magento immediately sends those updates to Google. You should see the updated prices and removals within an hour after saving changes. This is separate from product approval status checks with Google.

For details, see Google's [About ads approval process](#) and [Promotion approval process](#).

## Disapprovals and Errors

If a product returns with a disapproval, Magento provides an easy to access list of issues and associated products to revise and have reviewed again. You must resolve the issues for Google to review and approve your products. This process runs every time you update and save a product or add a new product matching the sync settings for the GMC.

- For product data requirements, see Google's [Product data specification](#) and our [best practices](#).
- For more information on disapprovals, see Google's [About item and account disapprovals for product data violations](#) and [About item disapprovals for policy violations](#).
- To review and resolve disapprovals, see [Managing Google Products](#) and [Managing Google Accounts](#).

www.janestore.com | GMC Account ID : 763456

572 Total Products ✓ 533 Products Approved

Product Disapprovals ⚠ Account Errors ⚠

Number of Disapproved Products : 42

Products with missing information or errors cannot be added to Google Merchant Center until the issues are resolved.

Error Description	Affected Products	Action
Missing images	1	Resolve
Invalid or missing required attribute : price	4	Resolve
Description character limit exceeded	1	Resolve
Missing details	2	Resolve
Invalid or missing required attribute : link	1	Resolve
Price mismatch	2	Resolve
Attributes not defined	1	Resolve
Missing images	2	Resolve
Invalid or missing required attribute : gender	1	Resolve

*Magento Google Shopping - Product and Account Error Tracking*

## Best Practices for Google

Helpful tips, tricks, and important information for your Google Shopping ads integration, Google Merchant Center (GMC), Google Ads, and more.

**?** **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

## Account Onboarding and Configurations

Use these helpful tips when completing [Google onboarding](#).

- Turn off pop-up blockers in your web browser. Some browsers may include pop-up blockers by default (like Chrome). You cannot complete onboarding with pop-up blockers enabled. Login screens open to Google using pop-up windows.
- Always check back on your Account and Product Errors to resolve issues. Magento performs some validation immediately, listing products that are missing information required by Google before review. Google performs revolving checks on your product updates to complete reviews for corrected and added products.
- After onboarding completes, we check for product approval and account status with Google every 30 minutes for the first 10 days of your integration. Google may require up to 72 hours to review all products submitted in your onboarding process. After the first 72 hours, Magento checks product and account status once every hour.
- For complex shipping and tax settings, you have an option to configure these settings in Google after account creation. Select that option and access your GMC account later to update. You must complete these Google configurations for products approvals.
- We recommend overestimating tax and shipping amounts if you cannot provide an exact match for costs. Google performs routine checks for merchant listed taxes and shipping costs, verifying the amounts best match actual calculations from your storefront. If the Google defined amounts are lower than your actual costs, Google may disapprove of the products and/or account.
- Your account may encounter errors and issues due to violations. For more information on account issues and suspensions, see Google's [Understanding account suspension for policy violations](#).
- Review and resolve your account errors quickly as possible. Your GMC account must be approved to continue and complete product approvals and campaigns. If your account is in error, all approvals are placed on hold and campaigns stop running.

## Product Management

- If you exceed your Google quota (default is 150,000) for total synced line items (all items in your product feed for all countries), you will receive an account error of too many products. For example, if you sell and promote a product across three countries, the total number counts against your total. Magento cannot extend or affect this quota. To increase your



limit, [contact Google with this form](#).

- Check for and remove excessive numbers of invalid products to keep your synced product amounts within your allocated quota.
- Consider adding product expiration dates to cycle through products on Google and stay within your allocated quota. When the expiration is reached, the product automatically deletes from Google. The default and maximum expiration date is 30 days after product addition or update to Google.
- If you save price changes to products, or remove products, Magento immediately sends those updates to Google. You should see the updated prices and removals within an hour after saving changes. This is separate from product approval status checks with Google.
- Ensure your products prices and availability (in or out of stock) match between your online storefront and GMC account. The quantity can differ and does not affect approval. Google uses the Magento Regular Price and Special Price. See Google's [Troubleshooter: Preemptive product disapproval \(price and availability\)](#).
- Consider not selling products that require personalization or customization during checkout. See Google's [Troubleshooter: Personalized goods](#).
- Determine if your products require a GTIN or Unique Product Identifier using Google's [decision form](#).

## Campaigns

- Smart Shopping Campaigns have a learning period of two weeks for the Google AI to optimize performance of your ads. Every time you edit and modify a campaign's budget or assigned products, Google requires another two week re-learning period.
- If you have submitted product data for the first time or significantly updated existing data in your GMC account, Google may take up to two business days to review the new data. As a result, products in your campaigns may take time to also update.
- Only approved products in your GMC account are eligible to run in ads.
- To better understand Google Ads issues, see Google's [Fix issues with a Shopping campaign](#).
- Plan your campaigns and keep track through the Google Shopping ads dashboard. All campaigns are manually created and ended through the Magento Admin. Magento does not support scheduled campaigns at this time.
- You can create many campaigns to prepare for different seasons and promotions, pausing them until ready to cycle the campaigns.
- Google serves and runs ads in all languages you configured when [claiming and verifying your URL](#). This may increase your costs for running ads.

## Onboarding Google Shopping ads Channel

This guide walks you through the entire onboarding process of setting up your accounts including Magento web account, Google Merchant Center (GMC) account, and Google Ads account. With your accounts created, your account and products start the Google approval process. You do not need to create your accounts prior to onboarding.



**Helpful tips for onboarding!**

Turn off pop-up blockers in your web browser. Some browsers may include pop-up blockers by default (like Chrome). You cannot complete onboarding with pop-up blockers enabled.

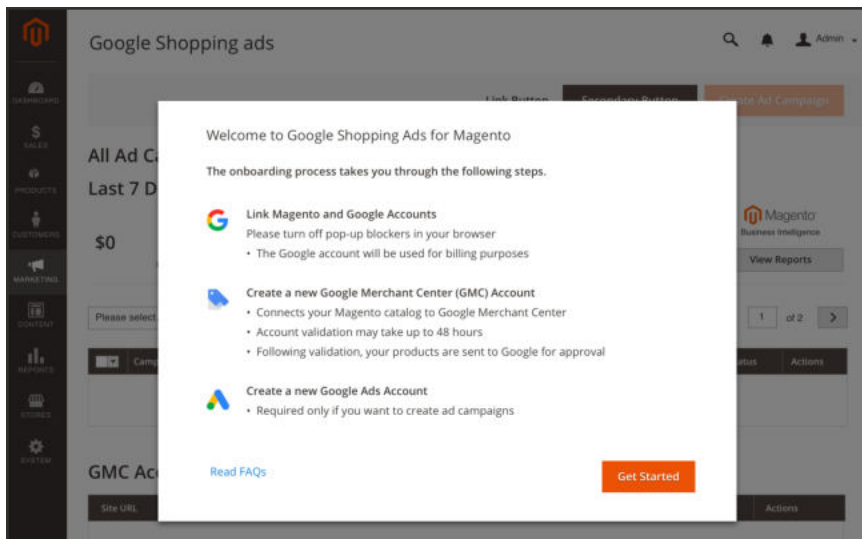
Your progress through the onboarding process will not be saved until you tap **Complete Setup**. We recommend completing all of these instructions to fully save your configurations.

**Invalid API key error?** You should have a valid API key to start onboarding. If you receive an invalid key error, [follow these instructions](#) to update your API key. You only need to add this key once.

STEPS	WHAT HAPPENS
<b>Step 1: Linking Accounts</b>	Link a <a href="#">Magento web account</a> and your <a href="#">Google account</a> . If you do not have these accounts, you can create them during this step.
<b>Step 2: Creating GMC Account</b>	This leads you through a 4 step process to create a new Google Merchant Center account.
<b>Step 3: Creating a Google Ads Account</b>	This leads you through a 2 step process in Magento and in Google Ads to create and activate a new Google Ads account, enter a payment method, and update settings. Optional third step, we also walk you through creating your first Smart Shopping Ads campaign.

When complete, this guide provides next steps to manage your products and kick off campaigns!

**Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.



## Verifying the Google API Key

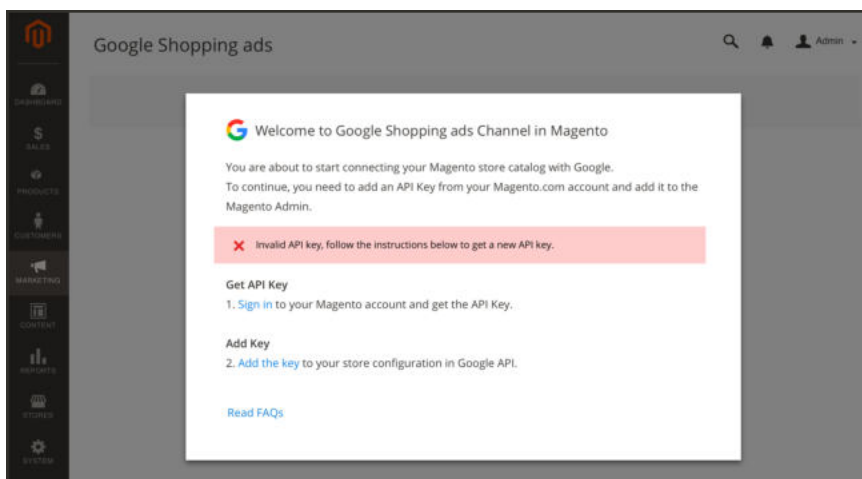
When opening Google Shopping ads, Magento automatically checks and validates the Google API key you have added in your store configuration. If validated, we send you to the first step of onboarding: **Step 1: Linking Magento and Google**.

If the key is missing, invalid, or expired, you will need to update the Google API key. The following instructions help you update your key and continue **onboarding**.

### To add the Google API Key:

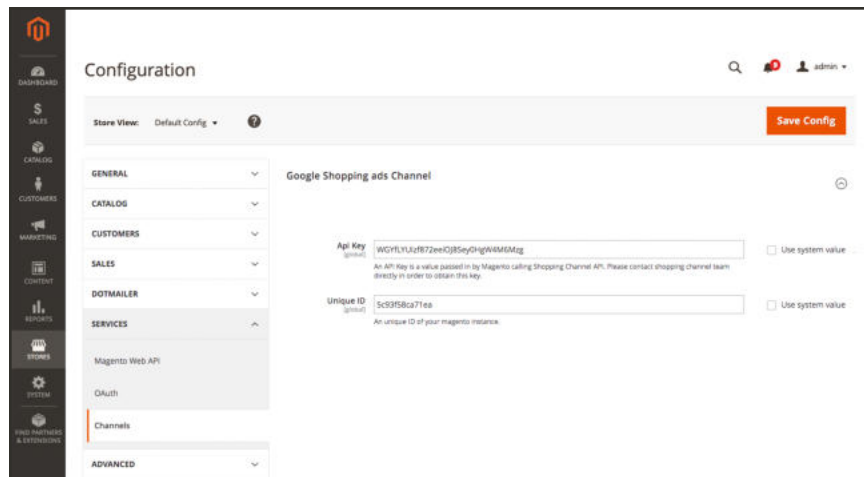
1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.

If your API key is invalid, the following screen displays to walk through the process.



*Onboarding API Key Verification*





*Add the API Key*

8. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**. Magento verifies and validates the entered API key, continuing with onboarding.

› **Continue to Step 1**

## Linking Google Account

**Step 1 of 3** for **Google Shopping ads Channel onboarding**.

You must link your Magento web account that you used to get your API Key with your Google account.

If you see a message requiring a Google API Key, see [Verifying the Google API Key](#).

Your **Google account** is a general or business specific account for adding Google services and additional account for Merchant Center and Ads.

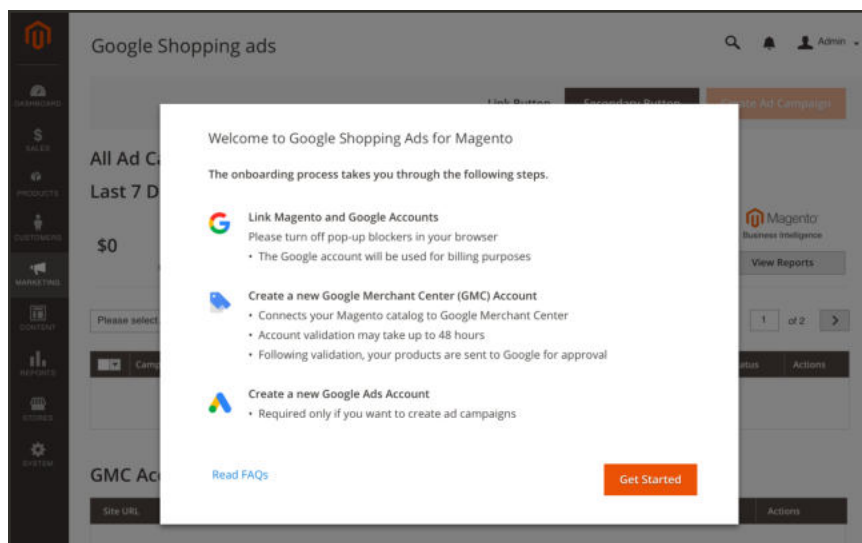
- If you already have a Google account, you'll need your Google log-in credentials for the linking process.
- If you don't already have a Google account, go to [accounts.google.com](https://accounts.google.com) and tap **Create account**. Follow the prompts to create a new Google account. Make note of your log-in credentials used to create your account. You'll need them for the linking process. When your account has been set up, continue with the steps below to sign in.

We recommend using a Google account associated to your business or company. This Google account will be the primary owner (admin) of the Google Merchant Center and Google Ads accounts you set up in this integration process. It will also have payment methods and complete purchases for Google Ads services for your company or business.

**Helpful tips for onboarding!** Turn off pop-up blockers in your web browser. Some browsers may include pop-up blockers by default (like Chrome). You cannot complete onboarding with pop-up blockers enabled.

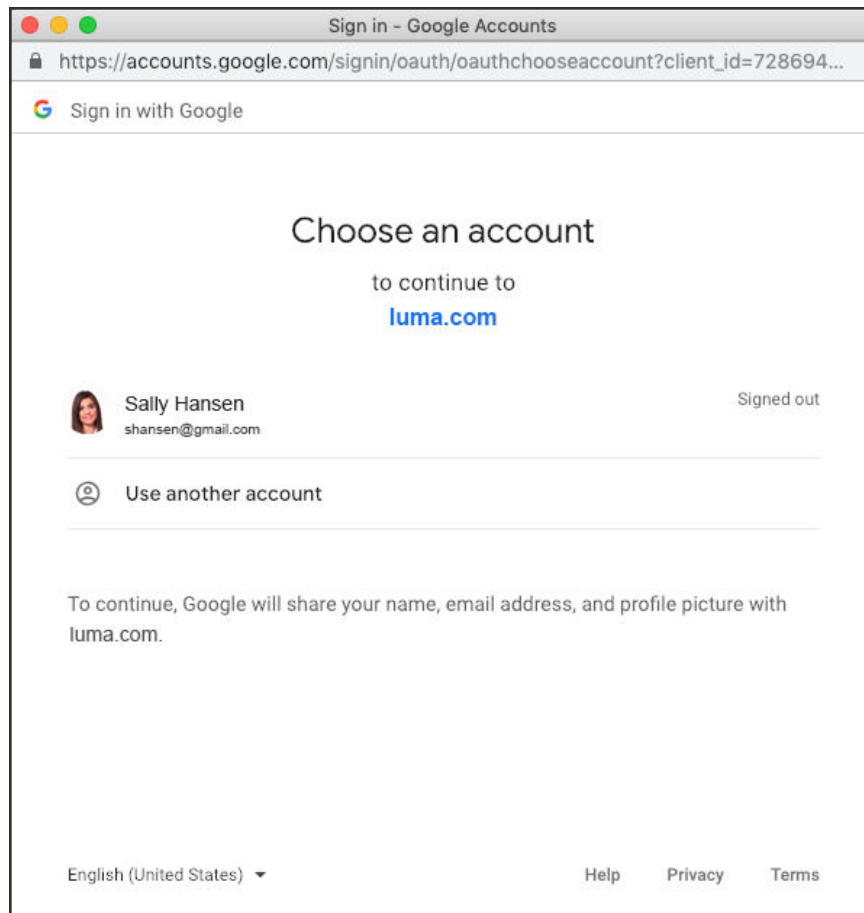
### Sign in to the Google Shopping ads Channel and link to Google:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. The onboarding overview displays. Tap **Get Started**.



3. In **Sign in with Google**, enter your Google account credentials (email address or select an account), and complete signing in.

You may need to enter an authenticator if added to the account during creation.



*Create a Smart Shopping Campaign*

> **Continue to Google Merchant Center Account**

## Creating a Google Merchant Center Account

**Step 2 of 3** for [Google Shopping ads Channel onboarding](#).

With your Magento web and Google accounts linked, you can create a Google Merchant Center (GMC) account and complete configurations for your products. See the [best practices](#) topic for onboarding tips.

### **Multiple Domains** (Storefront URLs)

Each GMC account can be associated with one storefront URL. If you have more than one storefront URL, you will create a GMC account for each of your store URLs. See Google's [Set up a multi-client account](#).

### **Wait, I have already claimed my URL with another GMC account!**

If your storefront URL is already verified and claimed by another GMC account, you must **unclaim** any URL that is already claimed for another GMC account before continuing with account creation.

When creating your account, you will do the following:



**Important!** Your progress through the onboarding process will not complete until you tap **Complete Setup**. We recommend completing all of these instructions to fully save your configurations, create your GMC account, and send the URL to Google to start URL claiming and verification.

STEPS	WHAT HAPPENS
Accept GMC Terms of Service	Review and accept the Terms of Service and Prohibited Content policies.
URL Verification	<p>Select the Website URL to associate with the new GMC account. Your website URL will be verified and claimed by Google.</p> <p>Only one domain URL can be associated with one GMC account. If you have multiple domain URLs, you will create a GMC account for each of your site URLs.</p>
Shipping and Tax	<p>Configure shipping and tax settings to provide an accurate estimate for potential sales. The exact amounts and options will be available to customers when completing checkout through your storefront.</p> <p>For complex shipping and tax settings, you have an option to configure these settings in Google after account creation.</p>
Attribute Mapping	<p>Map your Magento attributes to Google attributes. These connections determine how your products publish to Google.</p> <p>You can select to create and configure custom Magento attributes through this process. When you tap <b>Complete Setup</b>, Magento adds these custom attributes. You must configure these newly added attributes through the Catalog.</p>

## Accepting GMC Terms of Service

**Step 1 of 4** for GMC Account Creation.



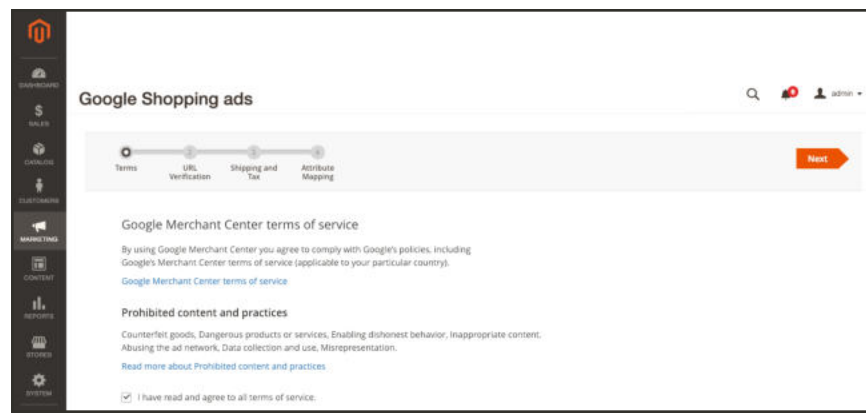
To create your account, you need to read and accept the Google Merchant Center [Terms of Service](#) and policies on [Prohibited Content](#).

We recommend paying close attention to the policies and details for restricted content. Google has specific requirements and guidelines for Adult, alcoholic, copyrighted, gambling-related, healthcare-related, and political products. If you sell [Adult](#) products, we guide you through the process of identifying these products during this onboarding process.

### To accept the terms and policies:

After entering your Google credentials and signing in:

1. Select the **I have read and agree to all terms of service** checkbox.



2. Tap **Next**.

> [Continue to Step 2](#)

## URL Verification

**Step 2 of 4** for [GMC Account Creation](#).

In this step, you will select your website URL to associate to the new Google Merchant Center (GMC) account. The selected site URL will be submitted to Google to be verified and claimed. This URL verification identifies you as the authorized owner of your storefront URL (domain). We recommend reviewing Google's [Verify and claim your website URL](#).

Magento attempts to automatically verify and claim your site URL after submission. If Magento is unable to verify and claim the URL automatically, it displays a notification that site failed to claim.

If your storefront URL is already claimed to a GMC account, you must **unclaim** it before it can be verified and claimed by another GMC account. We recommend that you **unclaim** any storefront URLs that may be already linked to a GMC account.

You can **manually verify and claim your site** through your GMC account and update the site information for your Magento store.

Selecting your site information:

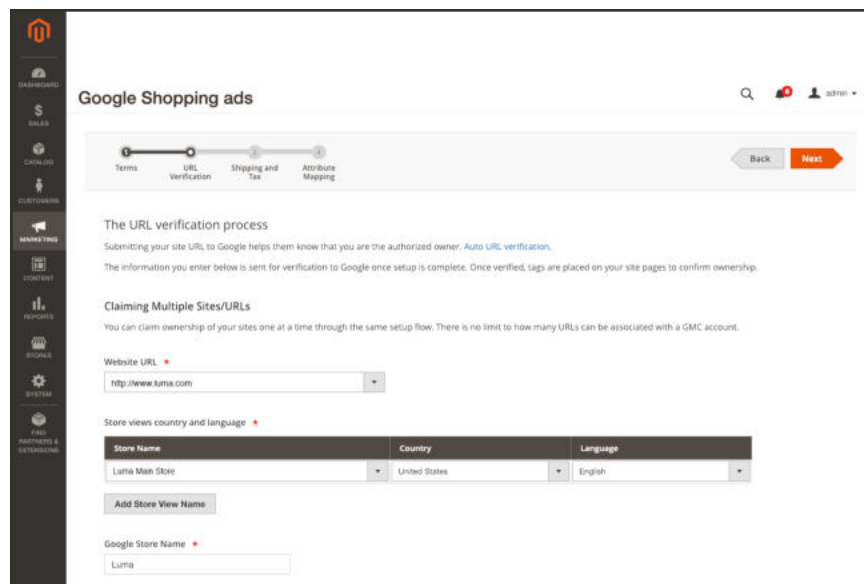
- **Website URL:** When integrating your store with Google, you select 1 website URL. Repeat onboarding to create new GMC accounts and add another URL.
- **Store Views:** Add store views to add product feeds through Google for locales. You can add multiple store views with a different language selected per view for international storefronts. If you add store views in languages not configured in your Magento backend, the ads will only contain product data from your Magento catalog. Additionally, each store views creates a separate feed in GMC. If a **product has errors**, you may see that error reported for each store view. For example, if you have 3 store views, 3 errors may display for the same product (one for each view).

**Multiple Domains (Storefront URLs)**  
 Each GMC account can be associated with one storefront URL. If you have more than one storefront URL, you will create a GMC account for each of your store URLs. See Google's [Set up a multi-client account](#).

**To select the URL to be verified and claimed:**

After accepting the Google terms and conditions, you will select your website URL:

1. For **Website URL**, select the storefront URL you want to associate with this GMC account.



2. Add the store views for your URL selecting a view name, country, and language for each Website URL. You can add multiple store views with a different language selected per view for international storefronts.
  - a. Select the **Store View Name**.
  - b. Select the **Country** of origin, used for shipping products and locale.
  - c. Select a **Language** matching the selected country.
  - d. Tap **Add Store View Name**.

- e. Repeat for each store view and locale as needed.

Google serves and runs ads for all the languages you add in this step. This may increase your cost for running ads. You may want to limit your supported languages when first onboarding and add languages later so you can estimate ad costs for international customers.

Store View Name	Country	Language
Luma Main Store	United States	English
Luma Europe Store	UK	English
Luma Europe Store	France	French

Add Store View Name

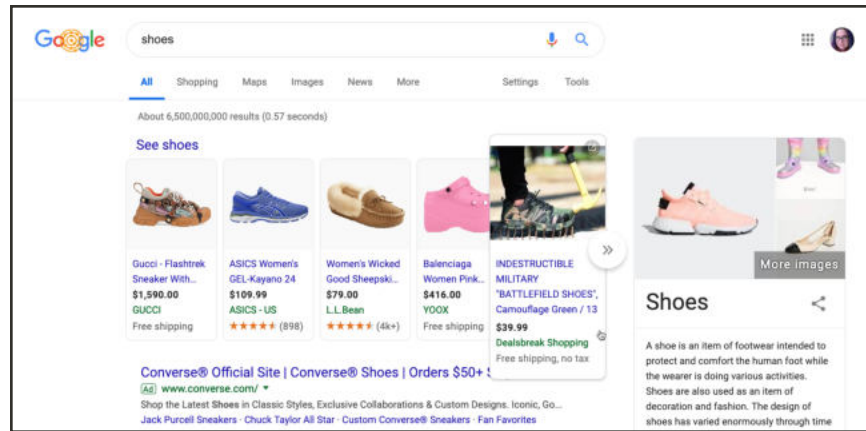
3. Enter a **Google Store Name** to identify this store URL and views in your GMC account. This value is used and displayed in Google Ads.
4. When you are finished, tap **Next**.
  - > **Continue to Step 3**

## Shipping and Tax

### Step 3 of 4 for GMC Account Creation.

To provide the best estimate of taxes, shipping, and grand totals for your customers, select the closest matching amounts for shipping and tax costs. Due to the complexity of shipping and taxes, you may want to enter shipping or tax settings through the Google Merchant Center (GMC). Your GMC account has extensive options to help you find the right calculations needed for your store. You must complete onboarding then configure values in your GMC account before Google approves your products.

These settings affect the displayed costs in your Google ads. As customers review ads, Google auto-detects their location, matches ads for them, and displays the calculated costs of product price, shipping, and tax. For example, searching for shoes and hovering over these sneakers, we see the seller provides free shipping and no taxes.



**Helpful Tips!**

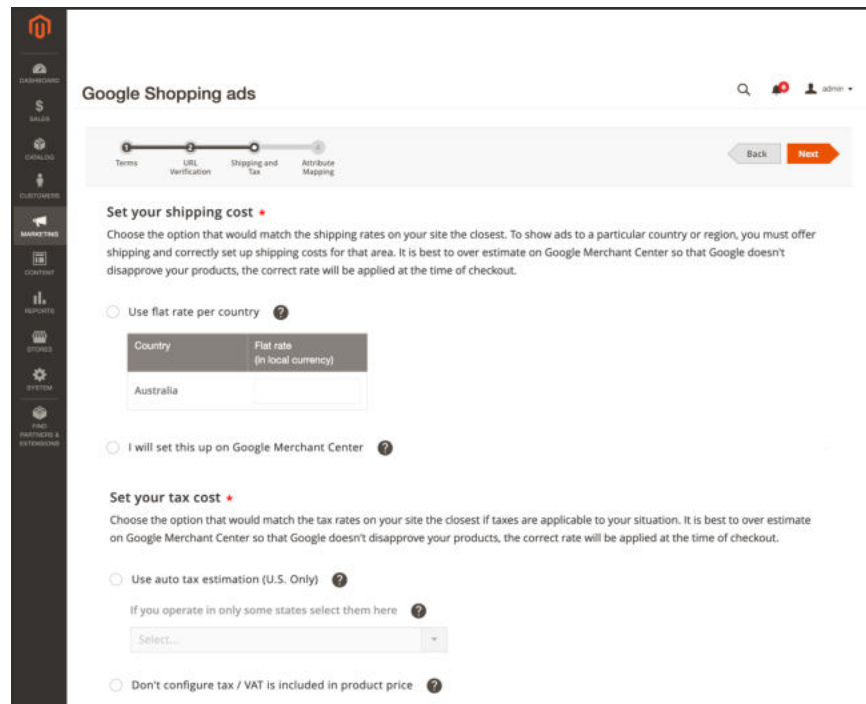
We recommend overestimating amounts if you cannot provide an exact match for costs. Google performs routine checks for merchant listed taxes and shipping costs, verifying the amounts best match actual calculations from your storefront. If the Google defined amounts are lower than your actual costs, Google may disapprove of the products and/or account.

**To set your shipping and tax rates:**

1. Select and set a flat rate or configure in Google to **Set your shipping cost:**
  - To assign a flat shipping rate for all your products, select **Use a flat rate for all orders** and enter an amount per country listed. To set free shipping, select this option and enter 0 for the flat rate.
  - To configure your shipping costs in Google Merchant Center, select **I will set this up on Google Merchant Center.**

If you select this option and your country's required shipping costs, you may receive an **account error** until you configure this setting in Google Merchant Center.

2. Select and set configurations to **Set your tax cost:**
  - If you are operating inside of the United States, select **Use auto tax estimation (U.S. Only)**. If you only sell and ship to some states in the US, select the states where you operate from the list or by entering the name. Google provides estimated taxes based on the address of customers and your configurations. For details, see Google's **Set up tax settings (US only)**.
  - If you are operating out of a country that uses VAT, or have no nexus in the United States, select **Don't configure tax/VAT is included in my product price.**



3. When complete, tap **Next**.

> [Continue to Step 4](#)

## Attribute Mapping

**Step 4 of 4** for [GMC Account Creation](#).

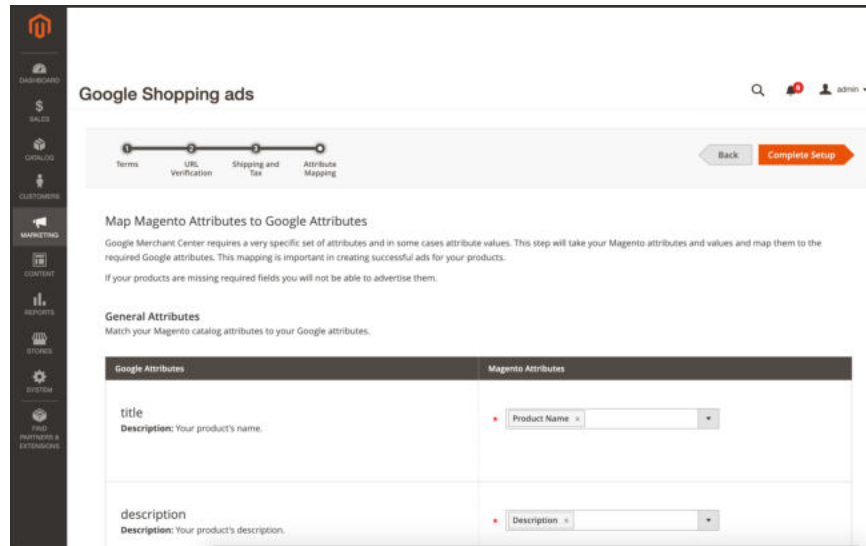
Finally, map your Magento attributes with Google attributes. This attribute mapping will sync your product details to Google's product feed format. Once you complete this step, all of your products will be sent to Google with this mapping.

For more information on attributes and data, see [About Google and Magento Catalogs](#).

This step can take additional time to complete. You may have an option to create attributes in your Magento catalog for a few of these settings. When you complete this step, the attributes are added and may require additional configurations after creating the account. You must complete this step to create your Google Merchant Center account. You can edit these settings at any time after completion.

For more information about Google's product attributes, see Google's [Product data specification](#).

**Bulk resolve product errors:** If you have a large number of products with the same error, you may be able to solve it by creating a [Magento attribute](#), configuring it for your products, and mapping it to one of the following Google attributes.



### Multiple Attributes

When configuring attributes, you can map multiple Magento attributes to a Google attribute. If each attribute has a value, the first mapped attribute takes priority. For example, If you use both EAN and UPC numbers in your Magento catalog, select both in the GTIN product attribute field. If a product in your catalog has an EAN of 456 and a UPC of 789, the product will use the UPC if it was selected first.

An additional Identifier Exists attribute is available for identifying new products without GTIN and brand or MPN and brand.

For best practices, see Google's [Tips to optimize your product data](#) and the following best practices:

CATEGORY	RECOMMENDED STRUCTURE
Apparel	Brand + Gender + Product Type + Attributes (Color, Size, Material)
Consumable	Brand + Product Type + Attributes (Weight, Count)
Hard Goods	Brand + Product + Attributes (Size, Weight, Quantity)
Electronics	Brand + Attribute + Product Type + Model #
Seasonal	Occasion + Product Type + Attributes
Books	Title + Type + Format (Hardcover, eBook) + Author

### To map General Attributes:

For each configuration, select attributes from the drop-down list per field, or begin typing to filter the list of attributes. We use the default Magento attributes in these instructions. If you use custom attributes, select those where applicable.

1. Required. For Google **title**, select Magento "Product Name". This is the name of the product to display in your ads.
2. Required. For Google **description**, select Magento "**Description**". This displays to customers when looking at your products through Google Ads.
3. For Google **Category attribute**, select the option that best matches your catalog:
  - If you want to associate all products sold on Google with one Google Category, select **I sell only one category of products and I do not use Magento attributes**. Select the category from the extensive list. For example, if you sell only clothing, you could select Apparel & Accessories > Clothing. For a list of categories, see Google's [google\\_product\\_category: Definition](#).
  - If you use a Magento attribute to signify Google categories, select **I sell multiple categories of products and I use Magento attributes**. Select all Magento attributes from the drop-down field list, or begin typing to filter and select attributes. Add all attributes matching products you will sell through Google.
  - To create new Magento attributes to associate to your catalog, select **I want to create a new Magento attribute**. The new attribute will be added to your products. You will need to add values for the attribute per products to complete account creation.

**Category attribute**

Indicate the category of your item based on the Google product taxonomy. Categorizing your product helps ensure that your ad is shown with the right search results.

**Requirements:** Required for Clothing & Accessories, Media, and Software. [Read more on Google](#)

Select one of the options below

I sell only one category of products and I do not use Magento attributes. [?](#)

Select Google Category

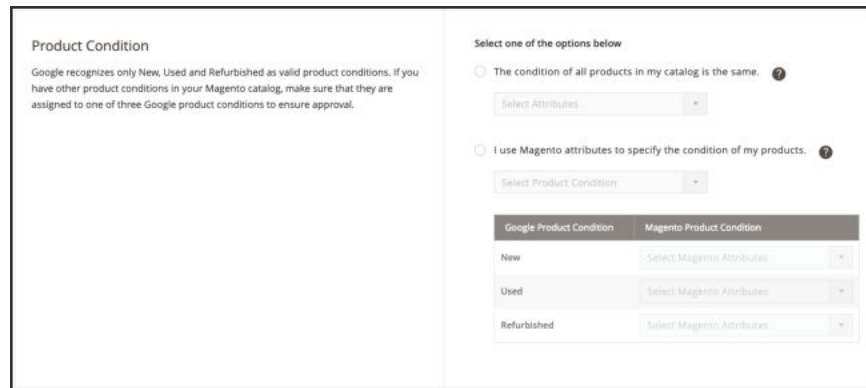
I have an existing Magento attribute that uses Google Category values. [?](#)

Select Magento Attribute

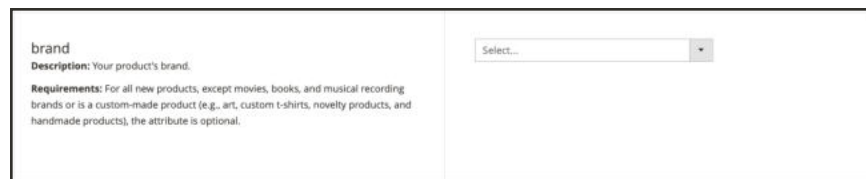
I want to create a new Magento attribute. [?](#)

4. For Google **condition**, select the option that best matches your product condition(s). For details, see Google's [condition: Definition](#).

- If all of your products fall under one condition, select **The condition of all products in my catalog is the same**. Select the condition, such as new.
- If you use specific Magento attributes for conditions, select **I use Magento attributes to specify the condition of my products**. Select the Magento attributes that best match the Google attributes for New, Refurbished, and Used. Then select and map all Magento attributes applicable per Google condition.



5. For Google **brand**, select the Magento brand attributes assigned to your catalog. This attribute is not required for all products. To increase sales for products you sell with associated brands, we highly recommend configuring and selecting brands. For examples and best practices, see Google's [brand: Definition](#).



6. Select the **GTIN** (Global Trade Identification Number) types for your products, typically assigned by manufacturers. This code is typically a code including UPC, EAN, JAN, ISBN, or ITF-14. To find your GTIN, see Google's [Find a GTIN](#).



7. Select the **mpn** (Manufacturer Part Number) for your products, typically assigned if your product does not have a GTIN. For details, see Google's [mpn: Definition](#).

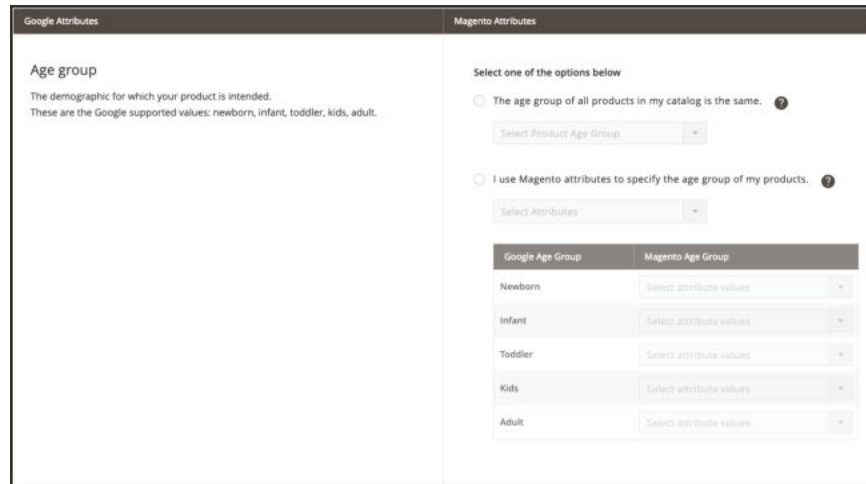


8. Select the Magento attribute that identifies any new products without a gtin and brand or mpn and brand. For details, see Google's [identifier\\_exists: Definition](#).
  - If all of your products do not have these settings, select **All my products don't have GTIN and brand or MPN and brand**.
  - If you use specific Magento attributes for these new products, select **I use Magento attributes to identify products that don't have GTIN and brand or MPN and brand**. Select the Magento attributes that identify these products.

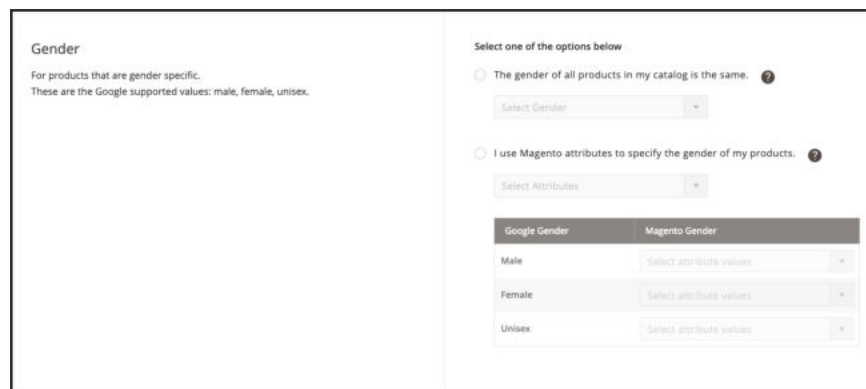
### To map Apparel and Accessories Attributes:

If your catalog contains apparel and/or accessories, consider mapping the following attributes.

1. For Google **Age Group**, select the attributes that best match your catalog. For details, see Google's [age\\_group: Definition](#).
  - If all of your products fall under one age group, select **The age group of all products in my catalog is the same**. Select the age group.
  - If you use specific Magento attributes for age groups, select **I use Magento attributes to specify the age group of my products**. Select the attribute(s). Then select the values that best match the Google attributes for Newborn, Infant, Toddler, Kids, and Adults.



2. For Google **Gender**, select the attributes that best match your catalog. For details, see Google's [gender: Definition](#).
  - If all of your products fall under one gender, select **The age group of all products in my catalog is the same**. Select the gender.
  - If you use specific Magento attributes for gender, select **I use Magento attributes to specify the gender of my products**. Select the Magento attribute. Then select the values that best match the Google attributes for Male, Female, and Unisex.



3. For Google **Color**, select Magento attributes for any colors you use such blue, red, white, black, green, and so on. For details, see Google's [color: Definition](#).



4. For Google **Size**, select Magento attributes for any genders you use such as extra-small, medium, large, extra-large, or numerical sizes like 16/32. For details, see Google's [size: Definition](#).



### To map Adult-Only Content Attributes:

If your catalog contains items intended for adults only, map the following attributes. Selling Adult-Only products not correctly listed without proper attributes may cause your products or account to be disapproved. For details, see Google's [adult: Definition](#) and policies on [Adult-oriented content](#).

If you use a Magento attribute to indicate adult-only products, select that attribute.

If you have adult-only products, but do not use a Magento attribute, complete onboarding. Then create an attribute, add it to products, and set the value. Finally, update the [attribute mapping](#) for Adult-Only with the new attribute.



### To complete GMC setup:

If you have completed attribute mapping, tap **Complete Setup**.

Magento and Google do the following:

- Magento sends all information you configured and entered during onboarding to Google.
- Google immediately creates the GMC account and begins the process to verify and claim the URL.

The verify and claim process can take a few hours. Check the [GMC Account](#) section of the dashboard to check the status. If automated claim is unsuccessful, see [Manually verify and claim a site URL](#).

- Once your URL is claimed and verified and if you have no account errors, Google begins reviewing and approving your synced products. These products become your Google Merchant Center catalog.

If Magento has an issue when creating attributes, a message may display. To resolve, see [Editing Attribute Mappings](#).

> [Continue to Google Ads](#)

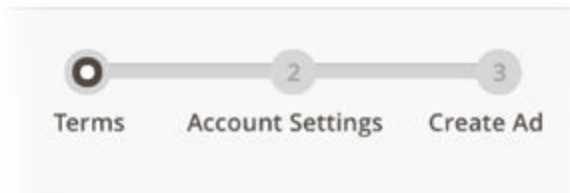
## Creating a Google Ads Account

**Step 3 of 3** for [Google Shopping ads Channel onboarding](#).

With your Google Merchant Center (GMC) created and products in-progress for approval, create a Google Ads account and complete your first Google Ads Smart Shopping campaign.

**Wait, I have a Google Ads account!**  
 Sorry, but the Google Shopping ads Channel implementation cannot support using an existing account. You must create a new Google Ads account.

When creating your account, you will do the following:



STEPS	WHAT HAPPENS
<a href="#">Google Ads Terms of Service</a>	Review and accept the Terms of Service and Prohibited Content policies.
<a href="#">Account Settings</a>	Configure your Google Ads account settings, activate your account, add a payment method, and update account settings.
	<p><b>Important:</b> Once you specify a currency and create your account, you cannot change the currency. You must also add a payment method and billing settings in the same currency.</p>
<a href="#">Creating Campaigns</a>	Optional. Create your first campaign as the last step of onboarding, or tap <b>skip</b> to create a campaign later. If you skip creating a campaign, you should still add an Ads <a href="#">payment method</a> and <a href="#">update settings</a> .

You should start in the process after creating your GMC account. If not, tap [Create Ad Campaign](#).

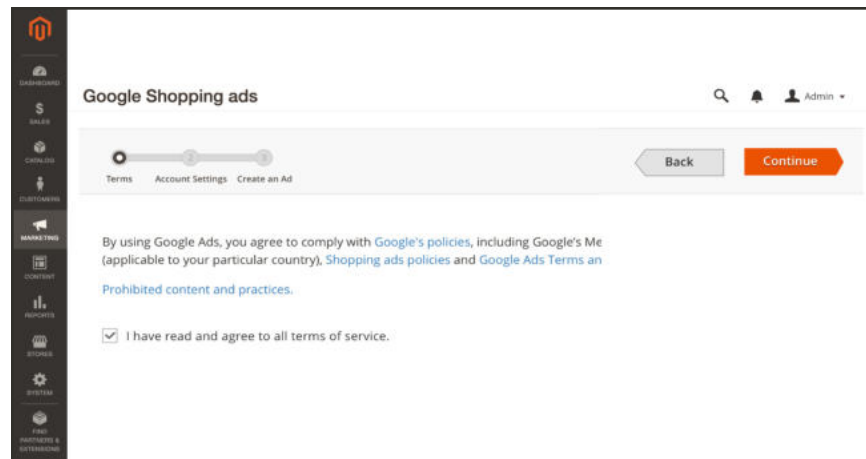
## Accepting Google Ads Terms of Service

**Step 1 of 2** for **Ads Account Creation**.

To create your account, you need to read and accept the Google Merchant Center Terms of Service. We recommend reviewing Google's [Shopping ads policies](#) and [Payment methods & terms of service finder](#).

**To accept the terms and policies:**

1. On the **Google Ads terms of service** page, select the **I have read and agree to all terms of service** checkbox.



2. Tap **Continue**.

> **Continue to Step 2**

## Account Settings

**Step 2 of 2** for **Ads Account Creation**.

To set up your account settings, complete the following:

- Set your country and timezone in the Google Ads Account Settings page. Currency automatically populates when you select a country.
- Activate your Google Ads account through an email invitation.
- Add a payment method in Google Ads.

**To set your currency and timezone:**

1. For the **Select Country**, select the country of origin for your store.
2. The **Currency** automatically sets for your store based on the country you selected. You may update this setting. For example, if you select United States, it sets the currency as USD for US Dollar.

**Important:** Once you specify a currency and create your account, you cannot change the currency. You must also add a payment method and billing settings in the same currency.

3. For **Timezone**, select the timezone for your store's region. The timezone you select affects all store data. For example, reports based on segments of time will generate different results depending on the timezone associated with the account.
4. When you are finished, tap **Continue**.
5. A confirmation message displays. If the settings are correct, tap **Confirm Settings**. If you need to modify settings, tap **Cancel** to return to Account Setup.
6. The **Create a Smart Shopping Campaign** page opens. Complete the steps below before creating a campaign.

**Don't forget!** You must activate your ads account, configure payment methods in your Google Ads account, and update settings in Magento for your account to go live. If you forget adding a payment method or updating settings, you will see a reminder message in the Magento Admin.

### To activate your Google Ads account:

You must activate and configure your account to create active campaign ads.

1. Check your email associated with your Google account.
2. Locate the Google Ads invitation and click the link to activate the account.

### To add a payment method:

In your Google Ads account, you must add a valid payment method using the currency selected during onboarding. For complete details, see Google's [Choose a payment method](#).

1. In a new web browser tab or window, open your [Google Ads account](#)
2. In your Google Ads account, access your account settings.

3. Locate the **Billing and Payments** section.
4. Add a supported payment method.
5. In Magento, continue with the **onboarding process**.

### To update account settings:

As a final step, you must update the payment setting for your Google integration.

1. On the Google Shopping ads Channel dashboard, tap **Settings**.
2. In the Google Ads section, select the checkbox for **Payment method configured**. Any payment method banner notifications will end. Your active campaigns publish and run with an approved account and products.

### Onboarding complete!

Next steps:

- Review and resolve any **account** and **product** disapprovals.
- **Create campaigns** to run ads on Google.

## Managing Google Accounts

Google Shopping ads provides detailed status and updates for your Google Merchant Center (GMC) account. After you complete onboarding, monitor your account status through the dashboard. If your account status is not disapproved, review and resolve those listed issues for Google to perform another review. Your account must be approved, with some to all products approved, to display linked products and run campaigns.

Account approval is vital for your GMC account and running ad campaigns.

### Requirements for Accounts

You need to complete and configure the following for accounts to be approved. Once approved, products are reviewed and campaigns run.

- Completed **onboarding** with a GMC account per URL
- Verified and claimed the URL assigned to the GMC account
- Received account approval from Google

### Google Account Basics

Understanding the basics and **best practices** helps you get ahead with managing GMC accounts:

- Google has guidelines and policies to determine if an account is approved: Google's [Terms of Service](#) and policies on [Prohibited Content](#).
- Ensure your product catalog does not exceed your account product maximum. Google allows you to sync and sell up to 150,000 products from your Magento catalog. If you attempt to sell more than 150,000 unique products, Google will disable and reduce the number of active products available. To increase your limit, [contact Google with this form](#).
- When verifying and claiming your URL, Magento attempts the claim process up to five times within an hour after submission. If the URL is not claimed within five attempts, Magento provides a notification with more information.
- Always check back on your Account and Product Errors to resolve issues. We recommend reviewing and resolving product errors as they can cause account disapprovals. Magento performs validation immediately, listing issues in the Product Errors. Google performs revolving checks on your product updates to complete reviews for corrected and added products.
- After onboarding completes, we check for product approval and account status with Google every 30 minutes for the first 72 hours of your integration. After the first 72 hours, Magento checks product and account status once every 24 hours.

**?** **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

### Account and Product Dashboard

When accessing Google Shopping ads, the dashboard provides a list of all linked GMC accounts and products. At a glance, learn more about your product status with Google. If you have disapprovals, click **View details** to review and resolve [Account](#) details.

Site URL	Google Store Name	GMC Accounts ID	Claim Status	Account Status	Products Status	Actions
https://www.janystore.com	Jan's	133799	✔ Claimed and Verified	✘ Disapproved	✘ Disapprovals	<a href="#">View Details</a>
https://www.jackstore.com	Jack's	656783	✔ Claimed and Verified	✔ Approved	✔ All Approved	<a href="#">View Details</a>
https://www.jillstore.com	Jack's	789034	✔ Claimed and Verified	✘ Disapproved	✘ Disapprovals	<a href="#">View Details</a>
https://www.jimstore.com	Jim's	895678	✘ Unclaimed	○ Pending Approval	✘ Disapprovals	<a href="#">View Details</a>

*GMC Account and Product status*



## Account and Product Information

OPTION	DESCRIPTION						
Site URL	The website URL targeted by the ad campaign. This identifies your storefront and product catalog.						
Google Store Name	The name entered when creating your GMC account for your URL, associated to your Magento store. See Google's <a href="#">About your store name</a> .						
GMC Account ID	The unique ID generated by Google for your GMC account.						
Claim Status	<p>The current verification and claim status of your site URL. You must have a claimed and verified URL to receive account approval. See Google's <a href="#">Troubleshooting your URL verification and claim</a>.</p> <table border="0"> <tr> <td>Claimed and Verified</td> <td>Google completed verification and claiming of the URL for this GMC account.</td> </tr> <tr> <td>Unclaimed</td> <td>The URL is not claimed yet. The claim process may be in-progress.</td> </tr> </table>	Claimed and Verified	Google completed verification and claiming of the URL for this GMC account.	Unclaimed	The URL is not claimed yet. The claim process may be in-progress.		
Claimed and Verified	Google completed verification and claiming of the URL for this GMC account.						
Unclaimed	The URL is not claimed yet. The claim process may be in-progress.						
Account Status	<p>The current status of your GMC account with Google. You must have an approved account to get your products approved and run ad campaigns.</p> <table border="0"> <tr> <td>Approved</td> <td>Open and update campaign settings. Be advised, updating budgets and products in campaigns can start a two week relearning period.</td> </tr> <tr> <td>Pending Approval</td> <td>Your GMC account is currently under review by Google. Ad campaigns do not run until the account is approved.</td> </tr> <tr> <td>Disapproved</td> <td>If your GMC account violates a policy or does not meet requirements, it is disapproved. All product reviews and ad campaigns are paused until the issues are resolved.</td> </tr> </table>	Approved	Open and update campaign settings. Be advised, updating budgets and products in campaigns can start a two week relearning period.	Pending Approval	Your GMC account is currently under review by Google. Ad campaigns do not run until the account is approved.	Disapproved	If your GMC account violates a policy or does not meet requirements, it is disapproved. All product reviews and ad campaigns are paused until the issues are resolved.
Approved	Open and update campaign settings. Be advised, updating budgets and products in campaigns can start a two week relearning period.						
Pending Approval	Your GMC account is currently under review by Google. Ad campaigns do not run until the account is approved.						
Disapproved	If your GMC account violates a policy or does not meet requirements, it is disapproved. All product reviews and ad campaigns are paused until the issues are resolved.						
Products Status	The current status of your products associated and mapped to your GMC account. Approved products meet Google <a href="#">product data specifications</a> and <a href="#">Shopping Ads policies</a> . If you sell products of an Adult-Only nature, you must also adhere to Google's <a href="#">Adult-oriented content</a> policies.						

OPTION	DESCRIPTION
All Approved	All products matching the attribute mapping for the GMC account have been received, reviewed, and approved by Google. If your GMC account is approved and you have create campaigns, ads run for those associated products.
Disapprovals	Some or all of the products for the GMC account do not meet the policies and data specifications. When reviewing disapprovals, we provide details on the issues to resolve and get another review.
Actions	Click <b>View details</b> to review <b>Account</b> and <b>Product</b> details. If you have disapprovals or issues, the details pages provide information and links to update products and settings for Google reviews.

## Resolving Account Errors

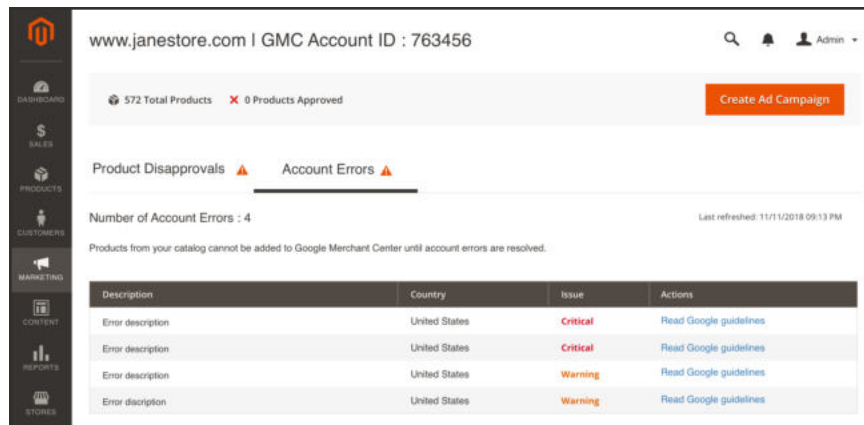
Your account may be disapproved or suspended due to breaking the Google [Terms of Service](#) and policies on [Prohibited Content](#). The following instructions and information help you review and resolve your account issues. Some of the issues that can cause disapprovals may include product issues. When you open an error, the issue displays with additional information and a link to Google policies and instructions. Review the information then complete edits and actions to resolve those issues through the Magento Admin.

Review Google's [Understanding account suspension](#), [best practices](#), and [troubleshooting](#) for additional information.

After onboarding completes, we check for product approval and account status with Google every 30 minutes for the first 72 hours of your integration. Google may require up to 10 days to complete reviews. After the first 72 hours, Magento checks product and account status once every 24 hours.

### To resolve account errors:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. In the GMC Accounts table, locate an account with Account Status of "Disapproved". In the **Actions** column, tap **Views Details**.
3. Tap **Account Disapprovals**. A list of all account issues displays.



### Account Disapprovals

- For each issue, tap **Read Google guidelines** in the **Actions** column. Complete any changes required to resolve the issue.

## Editing Account Settings

After **onboarding**, edit and update your account settings anytime you need through the Google Shopping ads dashboard. The available settings include all GMC selected options and information during account creation. The page also provides Ads account information and access, and the linked Google and Magento web accounts to this Google Shopping ads implementation.

Depending on **product** or **account** errors, you may need to update some or all of these settings.

**Have questions?** Check out the Google Shopping ads Channel **FAQ** and **best practices** topics to better understand Google and Magento integrations. You can also perform a search for **Google Shopping ads** in the Magento Help Center for additional troubleshooting topics.

Through this page, you can:

- **Update GMC account information and settings**
- **Remove a GMC account**
- **Update and view Ads account information and payment method**

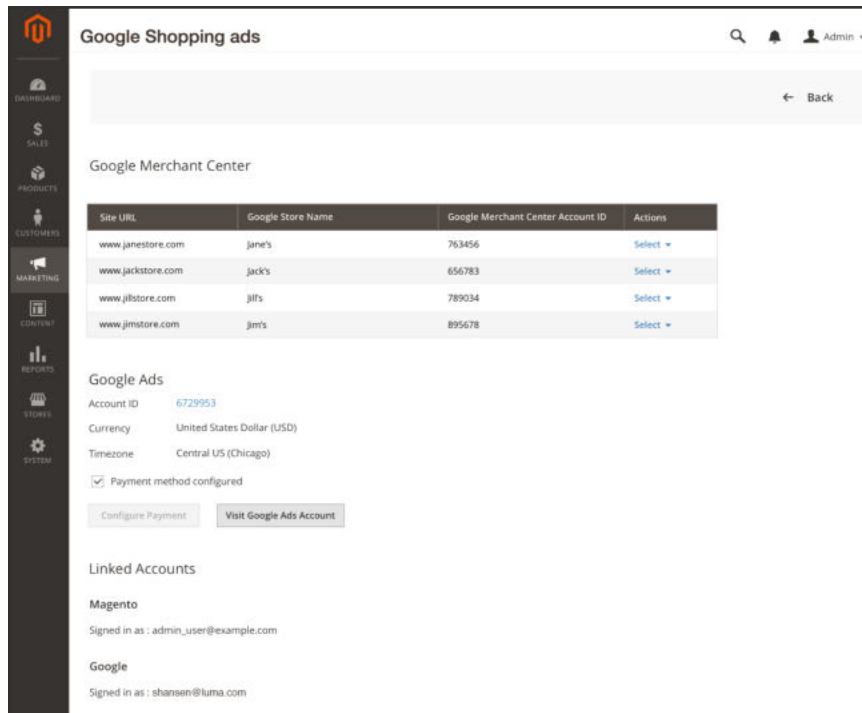
### Settings Overview

The settings page includes:

- Google Merchant Center with a table of all created GMC accounts
- Google Ads account associated to your integration including an option for Payment Method

and links to access Ads account pages on Google

- Email address of your linked Google account
- Email address of your linked Magento web account



Account Settings

### Google Merchant Center

OPTION	DESCRIPTION
Site URL	The website URL targeted by the ad campaign. This identifies your storefront and product catalog.
Google Store Name	The name entered when creating your GMC account for your URL, associated to your Magento store. See Google's <a href="#">About your store name</a> .
Google Merchant Center Account ID	The unique ID generated by Google for your GMC account.
Actions	Click <b>Select</b> to use one of the following options. Updates completed in the Magento Admin save to your GMC accounts.

OPTION	DESCRIPTION
<a href="#">Edit URL</a>	Update the URL for the GMC account.
<a href="#">Edit Shipping and Tax</a>	Modify shipping and tax settings for the account. If you select options to set information in Google, make sure to access and update those settings in your GMC account.
<a href="#">Edit Attribute Mapping</a>	Modify all attribute mappings between Magento and Google attributes.
<a href="#">Remove</a>	Removes the integration to the GMC account.

### Google Ads

These [settings](#) cannot be edited after creating the account.

OPTION	DESCRIPTION
Account ID	Linked Google Ads unique account ID, generated when creating your account.
Currency	The selected currency. Your billing and payment method in Google Ads must match this currency.
Timezone	Timezone for your store's region.
Payment method configured	Select this option when you have <a href="#">added a payment method</a> to your Google Ads account.
Configure Payment	Link to access payment methods in your Google Ads account.
View Google Ads Account	Link to access your Google Ads account.

### To update GMC account settings:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. Tap **Settings**. A list of all accounts and settings display.
3. For a specific GMC account, tap **Select** in the **Actions** column. Select an option.

### Edit the URL:

1. Tap **Edit URL** from the **Select** list.
2. Update the **Website URL** from the available list.
3. Update the **Google Store Name**.
4. Tap **Save Changes**.

*URL Setting*

### Edit the Shipping and Tax:

1. Tap **Edit Shipping and Tax** from the **Select** list.
2. Update your shipping costs or select a new option.
  - To assign a flat shipping rate for all your products, select **Use a flat rate for all orders** and enter an amount per country listed. To set free shipping, select this option and enter 0 for the flat rate.
  - To configure your shipping costs in Google Merchant Center, select **I will set this up on Google Merchant Center**.

If you select this option and your country's required shipping costs, you may receive an **account error** until you configure this setting in Google Merchant Center.

3. Update your tax settings or select a new option. For complete details, see Shipping and Tax.
  - If you are operating inside of the United States, select **Use auto tax estimation (U.S. Only)**. If you only sell and ship to some states in the US, select the states where you operate from the list or by entering the name. Google provides estimated taxes based on the address of customers and your configurations. For details, see Google's [Set up tax settings \(US only\)](#).
  - If you are operating out of a country that uses VAT, or have no nexus in the United States, select **Don't configure tax/VAT is included in my product price**.
4. Tap **Save Changes**.

Cancel Save Changes

**Set your shipping cost \***

Choose the option that would match the shipping rates on your site the closest. To show ads to a particular country or region, you must offer shipping and correctly set up shipping costs for that area. It is best to over estimate on Google Merchant Center so that Google doesn't disapprove your products, the correct rate will be applied at the time of checkout.

Use flat rate per country ?

Country	Flat rate (in local currency)
Australia	<input type="text"/>

I will set this up on Google Merchant Center ?

**Set your tax cost \***

Choose the option that would match the tax rates on your site the closest if taxes are applicable to your situation. It is best to over estimate on Google Merchant Center so that Google doesn't disapprove your products, the correct rate will be applied at the time of checkout.

Use auto tax estimation (U.S. Only) ?

If you operate in only some states select them here ?

Don't configure tax / VAT is included in product price ?

*Shipping and Taxes Setting*

### To remove a GMC account:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. Tap **Settings**. A list of all GMC and Ads accounts and settings display.
3. For a specific GMC account, tap **Select** in the **Actions** column.
4. Tap **Remove**.

### To update Google Ads information and payment method:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. Tap **Settings**. A list of all GMC and Ads accounts and settings display.
3. In the Google Ads section, review the linked account information. The linked ID and **Visit Google Ads Account** will take you to your Google Ads account.
4. To update the payment method, tap **Configure Payment**. Update your billing information with Google.
5. If you have added and updated your payment method, make sure to check **Payment method configured**. Magento requires this option checked.

## Unclaiming a Claimed URL

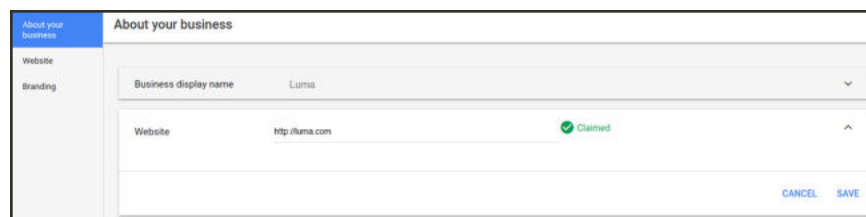
If you have a storefront URL that is already claimed to an existing Google Merchant Center (GMC) account, you can unclaim a claimed URL through Google.

When creating a GMC account in Google Shopping ads Channel, Magento attempts to automatically claim your store URL(s) after submission, but already-claimed sites will fail this automated process. Already-claimed sites must be unclaimed from one GMC account before claiming to another GMC account, as Google allows only one website URL to be associated with one GMC account.

Once unclaimed, a site can be **manually verified and claimed**.

### To Unclaim a Claimed Site URL

1. Login and open your **GMC account** in Google.
2. Select Business Information, then tap **About your business**.



*Claimed URLs*

3. Expand the claimed Magento website and delete it.
4. Tap **Save** to update removals from your account.



*Unclaimed and Clear GMC Account*

5. Review the listed URLs on your account to ensure the claims are removed.

## Manually Verify and Claim your Site

When you **created your GMC account**, you selected your storefront URL to associate to your GMC account. Until the site is claimed and verified by Google, the site URL will display on the Google Shopping ads dashboard with a Claim Status of "Unclaimed."



Site URL	Google Store Name	GMC Accounts ID	Claim Status	Account Status	Products Status	Actions
https://www.janestore.com	Jane's	133799	✔ Claimed and Verified	✘ Disapproved	✘ Disapprovals	<a href="#">View Details</a>
https://www.janestore.com	Jane's	895678	✘ Unclaimed	⚠ Pending Approval	✘ Disapprovals	<a href="#">View Details</a>

### *GMC Accounts: Unclaimed Site*

Magento attempts to automatically verify and claim your site URL after submission to Google. If Magento is unable to verify and claim the URL automatically, a notification will display and state that the site failed to claim.

A common reason for a site to remain in "Unclaimed" status is that the site has already been claimed by another GMC account. If you think this might be the case, you must **unclaim the site** before it can be claimed by your new GMC account. You can then manually verify and claim your site.

The manual verify and claim process includes:

- Logging into your GMC account to copy URL information
- Logging into your Magento admin and updating your store configuration
- Verifying and claiming the site URL in your GMC account

### **To manually verify and claim your site URL in Google:**

**Get your URL information in your GMC account.**

1. Login and open your **GMC account** in Google.
2. Select Business Information, then tap **About your business**. In the Website section, tap **Unclaimed** for the website you want to claim.
3. The **Other ways to verify and claim your website URL** section displays. Select and copy the meta tag text provided in the field.


**Update your store configuration in Magento admin.**

4. In a separate browser window, log into your Magento admin. Tap **Content** in the admin side bar. Under Design, tap **Configuration**.
5. In the Website column, locate the store for which the URL is to be claimed. Tap **Edit** in the Action column.
6. Tap **HTML Head**. In the **Scripts and Style Sheets** field, paste the meta tag text you copied in your GMC account.
7. Tap **Save Configuration**.

**Verify and claim the URL in your GMC account.**

8. In the GMC browser window, refresh your browser window. Tap **Verify**, and then tap **Claim**.

On the GMC Accounts dashboard in Google Shopping ads, the Claim Status column for the Site URL will update to "Claimed and Verified."

 **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

## Managing Products

Google Shopping ads provides detailed status and updates for your Google Merchant Center (GMC) products. After you complete onboarding and if your account status is not disapproved, products matching your attribute mapping begin syncing to your GMC account. Approved products display in ads depending on campaign settings.

### Requirements for Products to show in Ads


You need to configure the following for campaigns to actively display ads on Google networks. If these settings are not completed, ads do not run regardless if campaigns are listed as active.

- Completed [onboarding](#) with a GMC and an Ads account
- Added a payment method to Google Ads and updated settings (see [Account Settings](#))

### Google Products Basics

Understanding the basics and [best practices](#) helps you get ahead with managing products:

- The integration supports all Magento product types excluding gift cards, grouped products, simple products with required options, and bundled products with dynamic pricing.
- Google has guidelines and policies to determine if a product is approved: Google [product data specifications](#), [Shopping Ads policies](#), and [Adult-oriented content](#) policies.
- Ensure your products prices and availability (in or out of stock) match between your online storefront and GMC account. The quantity can differ and does not affect approval. Google uses the Magento Regular Price and Special Price. See Google's [Troubleshooter: Preemptive product disapproval \(price and availability\)](#).
- Always check back on your Account and Product Errors to resolve issues. Magento performs some validation immediately, listing issues in the Product Errors. Google performs revolving checks on your product updates to complete reviews for corrected and added products.
- After onboarding completes, we check for product approval and account status with Google every 30 minutes. Google may require up to 10 days to review all products initially. All new products may take up to 72 hours for review and approval.
- Update product mapped attributes to your GMC account to further refine product information.

 This is the prerelease version of Amazon Sales Channel. Content in this version is subject to change.

### Account and Product Dashboard

When accessing Google Shopping ads, the dashboard provides a list of all linked GMC accounts and products. At a glance, learn more about your product status with Google. If you have disapprovals, click **View details** to review and resolve **Product** details.

Site URL	Google Store Name	GMC Accounts ID	Claim Status	Account Status	Products Status	Actions
https://www.janastore.com	Jan's	133799	✔ Claimed and Verified	✘ Disapproved	✘ Disapprovals	<a href="#">View Details</a>
https://www.jackstore.com	Jack's	656783	✔ Claimed and Verified	✔ Approved	✔ All Approved	<a href="#">View Details</a>
https://www.jillstore.com	Jack's	789034	✔ Claimed and Verified	✘ Disapproved	✘ Disapprovals	<a href="#">View Details</a>
https://www.jenstore.com	Jen's	899678	✘ Unclaimed	⦿ Pending Approval	✘ Disapprovals	<a href="#">View Details</a>

*GMC Account and Product status*

### Account and Product Information

OPTION	DESCRIPTION				
Site URL	The website URL targeted by the ad campaign. This identifies your storefront and product catalog.				
Google Store Name	The name entered when creating your GMC account for your URL, associated to your Magento store. See Google's <a href="#">About your store name</a> .				
GMC Account ID	The unique ID generated by Google for your GMC account.				
Claim Status	<p>The current verification and claim status of your site URL. You must have a claimed and verified URL to receive account approval. See Google's <a href="#">Troubleshooting your URL verification and claim</a>.</p> <table border="0"> <tr> <td style="padding-right: 20px;">Claimed and Verified</td> <td>Google completed verification and claiming of the URL for this GMC account.</td> </tr> <tr> <td>Unclaimed</td> <td>The URL is not claimed yet. The claim process may be in-progress.</td> </tr> </table>	Claimed and Verified	Google completed verification and claiming of the URL for this GMC account.	Unclaimed	The URL is not claimed yet. The claim process may be in-progress.
Claimed and Verified	Google completed verification and claiming of the URL for this GMC account.				
Unclaimed	The URL is not claimed yet. The claim process may be in-progress.				
Account Status	The current status of your GMC account with Google. You must have an approved account to get your products approved and run ad campaigns.				

OPTION	DESCRIPTION
Approved	Open and update campaign settings. Be advised, updating budgets and products in campaigns can start a two week relearning period.
Pending Approval	Your GMC account is currently under review by Google. Ad campaigns do not run until the account is approved.
Disapproved	If your GMC account violates a policy or does not meet requirements, it is disapproved. All product reviews and ad campaigns are paused until the issues are resolved.
Products Status	The current status of your products associated and mapped to your GMC account. Approved products meet Google <b>product data specifications</b> and <b>Shopping Ads policies</b> . If you sell products of an Adult-Only nature, you must also adhere to Google's <b>Adult-oriented content</b> policies.
All Approved	All products matching the attribute mapping for the GMC account have been received, reviewed, and approved by Google. If your GMC account is approved and you have create campaigns, ads run for those associated products.
Disapprovals	Some or all of the products for the GMC account do not meet the policies and data specifications. When reviewing disapprovals, we provide details on the issues to resolve and get another review.
Actions	Click <b>View details</b> to review <b>Account</b> and <b>Product</b> details. If you have disapprovals or issues, the details pages provide information and links to update products and settings for Google reviews.

## Resolving Product Errors

Your products may be disapproved due to incorrect information, mapped attributes, display issues, broken policies, and so on. The following instructions and information help you review

and resolve your account issues. When you open an error, all products sharing that error are listed with additional information and a link to Google policies and instructions. Click through each product to actively edit and resolve those issues through the Magento Admin.

Important information about resolving errors:

- As you save changes, product data automatically syncs to Google using a cron job. Reviews may take additional time to initiate and complete. After onboarding completes, we check for product approval with Google every 30 minutes. Google may require up to 10 days to review all products submitted in your onboarding process.
- You may see multiple product issues for the same product. Each **store view** you added during onboarding created a separate feed in GMC. If a product has errors, you may see that error reported for each store view. For example, if you have 3 store views, 3 errors may display for the same product (one for each view).
- If you have a large number of products with the same error, you may be able to solve it by creating a **Magento attribute**, configuring it for your products, and mapping it to a **Google attribute**. This bulk resolves errors.

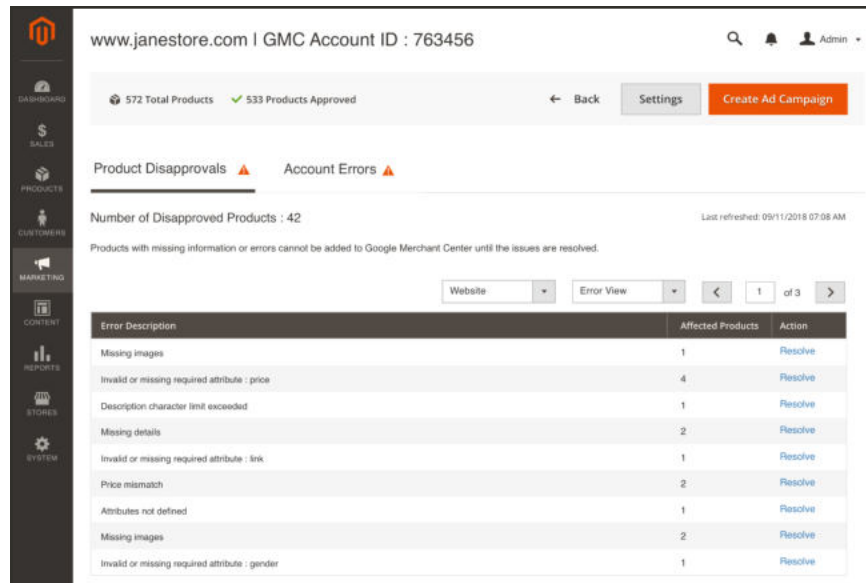
Review Google's **Product data specification** to best understand the product data used by Google. The following information and our **best practices** and **troubleshooting** may help resolve issues.

- Your products may break policies on **Prohibited Content**.
- Ensure your products prices and availability (in or out of stock) match between your online storefront and GMC account. The quantity can differ and does not affect approval. Google uses the Magento Regular Price and Special Price. See Google's **Troubleshooter: Preemptive product disapproval (price and availability)**.
- Consider not selling products that require personalization or customization during checkout. See Google's **Troubleshooter: Personalized goods**.
- Determine if your products require a GTIN or Unique Product Identifier using Google's **decision form**.
- Images may not display correctly due to a number of possible issues including lag in updating files, caching of old images after you provide new images, images use unsupported formats (JPG, PNG, GIF are supported), image URLs have changed or are incorrect, redirection issues, file size issues, and a few other possibilities. See Google's **Fix images that aren't displaying**.

### To resolve product errors:

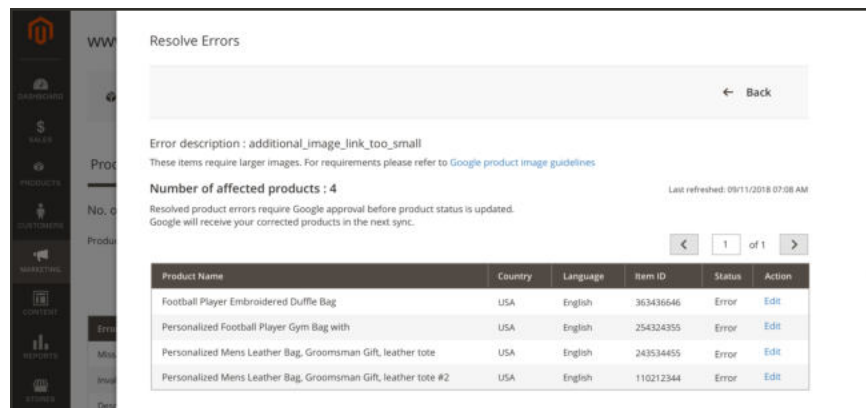
Use these instructions to resolve all product issues.

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. In the GMC Accounts table, locate an account with Product Status of "Disapprovals". In the **Actions** column, tap **Views Details**.
3. Tap **Product Disapprovals**. A list of all grouped product issues displays.



*Product Disapprovals*

4. For each issue, tap **Resolve** in the **Actions** column.
5. The **Resolve Errors** page displays with issue information, a link to Google guidelines, and a list of products disapproved for the issue.



*Product Issues to Resolve*

6. For each product, tap **Edit** in the **Action** column.


- a. Update information and settings in the product based on the error.
  - b. Save the product changes.
  - c. Review and update each product in the list.
7. When complete, tap **Back** to continue resolving errors.

## Editing Attribute Mappings

After onboarding, you may need to update attribute mappings between your Magento catalog and a specific Google Merchant Center (GMC) account.

Immediately after onboarding, you may encounter an issue creating new Magento attributes. If you selected to create a Category, Magento attempts to create an attribute after onboarding. If an issue occurs, see the [Resolve Errors with Attribute Mappings](#) section.

As your catalog matures and business expands, attribute sets and options may enhance to better define your products. This also helps to bulk resolve Google disapprovals. If you want to add to or modify existing Magento attributes associated per GMC attribute, see the [Update Attribute Mappings with Google](#) section.

 **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

### Resolve Errors with Attribute Mappings

You have two options to solve issues when creating attributes. Either edit your GMC settings and [select another option](#), or create new attributes and map them.

1. [Create a new product attribute](#).
2. Assign the attribute to the product and set the value.

If you create an Adult-Only attribute to identify adult-oriented products, it must support "True" and "False" for the value. Google only accepts "True" or "False" for adult attributes.

For additional information on attributes, see [Attribute Mapping](#).

3. [Update attribute mappings](#) in Google Shopping ads.

### Update Attribute Mappings with Google

This information walks through editing and updating your attribute mappings. For additional information, see [Attribute Mapping](#).

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. Tap **Settings**. A list of all GMC and Ads accounts and settings display.

3. For a specific GMC account, tap **Select** in the **Actions** column. Select **Edit Attribute Mapping**. Attributes you mapped during onboarding display for the following values. Update settings as needed.
4. Tap **Save Changes**.

The screenshot shows the 'Attribute Mapping Settings' interface. At the top right, there are 'Cancel' and 'Save Changes' buttons. Below is the 'General Attributes' section with the instruction 'Match your Magento catalog attributes to your Google attributes.' The interface is divided into two columns: 'Google Attributes' and 'Magento Attributes'.

Google Attributes	Magento Attributes
<p><b>title</b> Description: Your product's name.</p>	<p>Product Name</p>
<p><b>description</b> Description: Your product's description.</p>	<p>Description</p>
<p><b>Category attribute</b> Depending on how many categories are in your Magento catalog and whether you use Magento catalog attributes, select one of the options shown.</p>	<p>Select one of the options below</p> <p><input type="radio"/> I sell only one category of products and I do not use Magento attributes.</p> <p>Select Google Category</p> <p><input checked="" type="radio"/> I sell multiple categories of products and I use Magento attributes.</p> <p>gmc_category</p> <p><input type="radio"/> I want to create a new Magento attribute.</p>

Attribute Mapping Settings

### General Attributes Field Descriptions

FIELD	DESCRIPTION
Title	Your product's name.
Description	<p>Your product's description. Accurately describe your product and match the description from your landing page.</p> <p>Include only information about the product. Don't include links to your store, sales information, details about competitors, other products, or accessories.</p>
Category attribute	<ul style="list-style-type: none"> <li>I sell only one category of products and I do not use Magento attributes – If you do not use a Magento attribute to indicate your product category, choose a <b>Google category</b> that best matches your products.</li> </ul>



## General Attributes Field Descriptions (cont.)

FIELD	DESCRIPTION
	<ul style="list-style-type: none"> <li>• I sell multiple categories of products and I use Magento attributes – If you have set up a Magento attribute that uses Google's schema for categories.</li> <li>• I want to create a new Magento attribute – A new Magento attribute will be created and assigned to all products in your catalog. Once setup is complete, assign Google categories to this new attribute at a product level.</li> </ul>
Product Condition	<p>The condition of your product at time of sale.</p> <ul style="list-style-type: none"> <li>• If all of your products fall under one condition, select <b>The condition of all products in my catalog is the same</b>. Select the condition, such as new.</li> <li>• If you use specific Magento attributes for conditions, select <b>I use Magento attributes to specify the condition of my products</b>. Select the Magento attributes that best matches the Google attributes for New, Refurbished, and Used.</li> <li>• New – Your product is new and has never been used. It is in its original packaging, which has not been opened.</li> <li>• Refurbished – While your product isn't new, it has been professionally restored to working order so that it appears new, and it comes with a warranty. The product might or might not be in its original packaging. This is sometimes referred to as remanufactured.</li> <li>• Used – Your product is a second-hand item. For example, the product has been used before, the original packaging, or the original packaging is missing.</li> </ul>
Brand	<p>Your product's brand name. This helps identify your product and is shown to users who view your ad. It is required for any product with a clearly associated brand or manufacturer.</p> <p>Only provide your store name as the brand if you manufacture the product, or your product falls into a generic brand category.</p>
GTIN	<p>The product's Global Trade Item Number (GTIN), which is a globally unique, 14-digit number used to identify trade items, products, or services. Exclude dashes and spaces.</p> <p>UPC, EAN, JAN, ISBN, and ITF-14 are currently supported.</p>

### General Attributes Field Descriptions (cont.)

FIELD	DESCRIPTION
MPN	<p>Manufacturer Part Number. Required for all products without manufacturer-assigned GTINs.</p> <ul style="list-style-type: none"> <li>• Only submit MPNs assigned by a manufacturer</li> <li>• Use the most specific MPN possible. For example, different colors of a product should have different MPNs</li> </ul>
Identifier Exists	<p>Magento attribute(s) that identifies any new products without a gtin and brand or mpn and brand. For details, see Google's <a href="#">identifier_exists: Definition</a>.</p> <ul style="list-style-type: none"> <li>• If all of your products do not have these settings, select <b>All my products don't have GTIN and brand or MPN and brand</b>.</li> <li>• If you use specific Magento attributes for these new products, select <b>I use Magento attributes to identify products that don't have GTIN and brand or MPN and brand</b>. Select the Magento attributes that identify these products.</li> </ul>

### Apparel and Accessories Attributes Field Descriptions

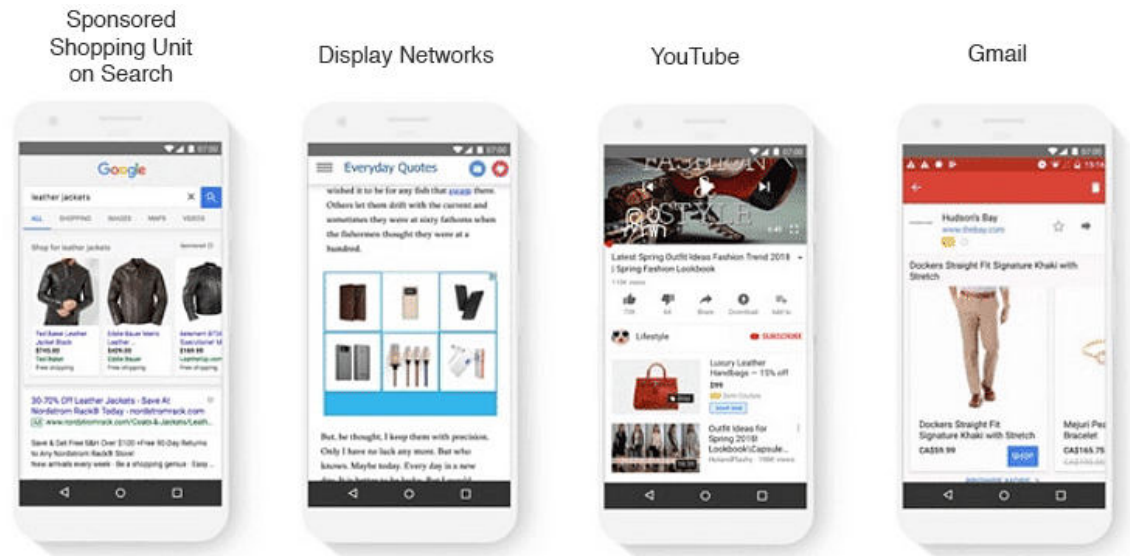
FIELD	DESCRIPTION
Age group	<p>Indicates your catalog has assigned ages groups such as newborn, kids, womens, or mens.</p> <ul style="list-style-type: none"> <li>• The age group of all products in my catalog is the same.</li> <li>• I use Magento attributes to specify the age group of my products.</li> </ul>
Gender	<p>Indicates if your catalog has assigned genders, such as unisex, female, or male.</p> <ul style="list-style-type: none"> <li>• The gender of all products in my catalog is the same. If selected, Google associates your catalog to the Google selection.</li> <li>• I use Magento attributes to specify the gender of my products.</li> </ul>
Color	The Magento color attribute used for your products
Size	The Magento size attribute used for your products

## Adult-Only Content Attributes Field Descriptions

FIELD	DESCRIPTION
Adult only	<p>The Magento adults-only attribute used for your products. If your catalog contains items intended for adults only, select the Magento attribute.</p> <p>If you have adult-only products, but do not use a Magento attribute, complete onboarding. Then create an attribute, add it to products, and set the value. Finally, update the attribute mapping for Adult-Only with the new attribute.</p> <p>Selling Adult-Only products not correctly listed without proper attributes may cause your products or account to be disapproved. For details, see Google's <a href="#">Adult-oriented content</a>.</p> <ul style="list-style-type: none"> <li>• I only sell adult products – Indicates your entire product catalog is Adult-Only, setting the attribute as true in Google.</li> <li>• Only products with the following attributes are "adult" products – Set if only a subset of your products are Adult-Only and have a Magento attribute identifying them. Select the corresponding Magento attribute from the drop-down field list.</li> <li>• Some of my products are "adult" but I don't use a Magento attribute to specify them – Select if some but not all of your products are Adult-Only. An Adult attribute is added to all products in your catalog. After GMC account creation, make sure to update the attribute as yes/no for all products. Adult-Only products should have the attribute set to Yes or 1.</li> </ul>

## Managing Ad Campaigns

Simplify your ad campaign management, increase your sales, and expand your reach with Smart Shopping campaigns. Smart Shopping campaigns combine, your existing product catalog with Google's machine learning to show a variety of ads across different ad networks. Networks include the Google Search Network, the Google Display Network, YouTube, and Gmail. Smart Shopping campaigns feature both Product Shopping ads and display ads (including Remarketing Ads and Similar Audiences). To learn more about Google Ads, see [About Google Merchant Center and Ads](#).



## Requirements for Campaigns

You need to configure the following for campaigns to actively display ads on Google networks. If these settings are not completed, ads do not run regardless if campaigns are listed as active.

- Completed **onboarding** with a GMC and an Ads account
- Added a payment method to Google Ads and updated settings (see **Account Settings**)

## Campaign Basics

Understanding the basics and **best practices** helps you get ahead with campaigns:

- Edit the campaign anytime to update settings for Paused and Active campaigns.
- Updates sync immediately to Google.
- The displayed date matches the campaign creation date. If paused then moved to active again, the new active date displays. When you end a campaign, the date clears.
- Create, pause, and end your campaigns directly through the dashboard **Actions** menu. Google Shopping ads Channel does not provide scheduling features.
- Campaigns immediately run with approved products in the Google catalog. The ads include newly approved products as they are processed.
- Campaigns can have the following status: Active (running), Paused (not running), and Ended (completed and not running).
- You can select all or a filter list of products in your Google catalog. The integration supports all Magento product types excluding gift cards, grouped products, simple products with required options, and bundled products with dynamic pricing. Google also recommends not selling products requiring customization or personalization.

**Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

### Ad Campaign Dashboard

When accessing Google Shopping ads, the dashboard provides a list of all ad campaigns for a date range. At a glance, learn more about the following:

- Calculated reporting of all costs and sales associated to your campaigns
- Campaign details and status
- Action options including editing and pausing campaigns

**All Ad Campaigns**  
Last 14 days: Mar 22 - Apr 5, 2019

\$45,000 Cost  
\$2.33 Return on Ad Spend (ROAS)  
\$10,970 Conversion Value  
27 Conversions

Campaign Name	GMC ID	Products	Daily Budget	Cost	Clicks	Conversions	Conversion Value	Launch Date	Status	Actions
Summer Fashion	763456	344	\$500	\$198	57	14	\$377	07/02/2018	Active	Select
Discount All	656783	875	\$1500	\$250	111	53	\$4753	07/02/2018	Active	Select
Swimwear Promo	789634	56	\$200	\$87	78	42	\$434	—	Ended	Edit
Activewear Sale	895678	73	\$100	\$110	210	57	\$3235	07/02/2018	Paused	Pause
Maxi Dresses	027304	22	\$50	\$44	45	24	\$123	—	Ended	End
Waterbottles	028126	1500	\$125	\$100	222	78	\$1037	—	Ended	Select
Coats Sale	817540	84	\$640	\$500	12	31	\$234	07/02/2018	Paused	Select
Sweaters Sale	015441	27	\$720	\$430	19	21	\$768	—	Ended	Select

*Ad Campaigns Dashboard*

### Campaign Information

OPTION	DESCRIPTION
Campaign Name	Entered name for the campaign.
Site URL	The website URL targeted by the ad campaign. This identifies your storefront and product catalog.
Products	Total number of eligible products. Not all products may be published in the campaign.
Daily Budget	The set average daily budget for spending on ads.
Cost	The actual amount to spent on the campaign for the time range.
Clicks	Number of clicks completely on products part of this ad campaign.

OPTION	DESCRIPTION
Conversions	Number of purchases completed after clicking on products in this ad campaign.
Conversion Value	Reported value of conversion from click to purchase. This amount is determined according to the passed gtag.
Launch Date	The date when the campaign was created. Ended campaigns do not have a listed date.
Status	Supported Google Ads status for the campaign. For more information, see Google's <a href="#">About campaign status</a> .
	<p>Active</p> <p>Eligible and actively displays ads on Google. The campaign runs until <b>Paused</b> or <b>Ended</b> through the Actions menu.</p> <div data-bbox="906 806 1414 982" style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>This is the default state for created campaigns. If you do not have a <a href="#">configured payment method</a>, ads are not actively running.</p> </div>
	<p>Paused</p> <p>Inactive due to being paused. To run, the campaign must be enabled and Active. Ads do not display on Google.</p>
	<p>Ended</p> <p>Campaign was ended through the Actions menu and no longer runs. The date clears. Ads do not display on Google.</p>
Actions	Available actions:
	<p>Edit</p> <p>Open and update campaign settings. Be advised, updating budgets and products in campaigns can start a two week relearning period.</p>
	<p>Enable</p> <p>Activates a campaign and begins running ads based on eligibility. The status sets to Active.</p>
	<p>Pause</p> <p>Deactivates a campaign without ending it. It remains inactive due to being paused, not running again until enabled. The status sets to Paused.</p>
	<p>End</p> <p>Concludes or ends the campaign. The date clears.</p>

## Creating Campaigns

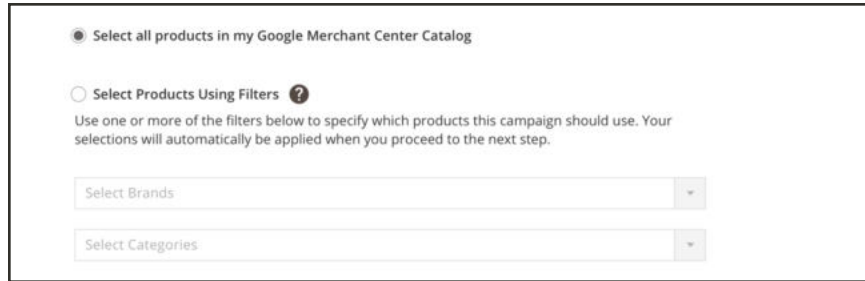
Google Shopping ads supports Smart Shopping ads. Smart Shopping campaigns help simplify your campaign management, maximize your conversion value, and expand your store's reach.

An important aspect to creating and maintaining your ads is the daily budget. Setting a budget indicates the average maximum amount you want spend for displaying and promoting the Smart Ads per day. Google has intelligent tracking and algorithms to evaluate the popularity of your products, ad displays and click-throughs, and much more. If an ad is popular with significant click-throughs, Google may promote the ad more, possibly spending more of your budget. The amounts balance, never exceeding your average, and rolling over amounts not spent from one day to the next.

To learn more about Google Ads budgets, see Google's [Daily budget: Definition](#) and [Set a budget for your campaign](#).

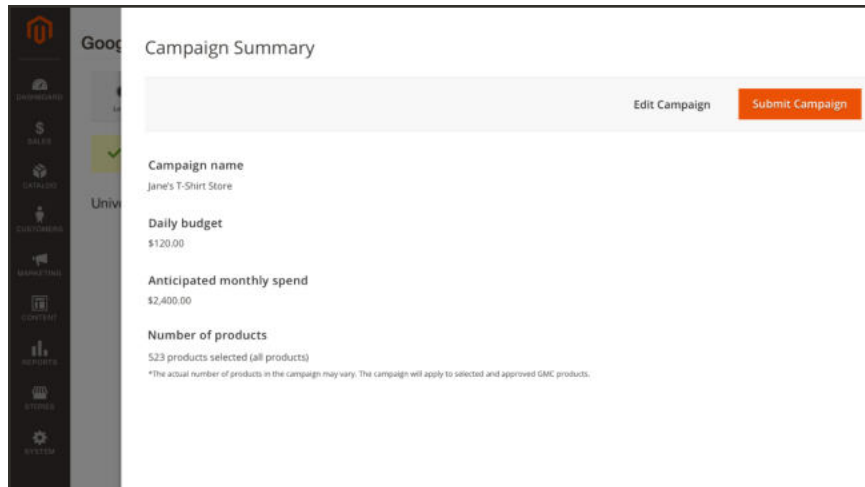
### To create a Smart Shopping campaign:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. Tap **Create Ad Campaign**.
3. If you have multiple GMC accounts, locate and **Select Your Google Merchant Center account**.
4. Select the country of sale for your campaign for the **Country to advertise in**. If the website store views have product data for that country and locale, content displays in that language.
5. Enter a **Campaign Name**.
6. Enter a **Daily Budget** to set the average maximum amount you want to spend on your ads per day. If you do not spend this entire amount in a day, the remaining amount rolls over to the next day.
7. For **Select Products for the Campaign**, select your products to sell with Google through this campaign:
  - To add all of the GMC products to this campaign, tap **Select all products in my Google Merchant Center catalog**.
  - To add a specific set of GMC products matching attributes and categories to this campaign, tap **Select Products Using Filters**. Select from the drop-down list or start typing to add filters for brand or categories.



*Create a Smart Shopping Campaign*

8. When complete, tap **Review Campaign**.
9. The **Review Campaign** page lists all aspects of your ad campaign, including, review the details of your campaign.
  - To make edits, tap **Edit Campaign**.
  - If everything looks accurate, click **Submit Campaign**. This publishes the campaign on Google. It is active but not running ads until your **account** and **products** are approved. When published, the campaign displays in the list on the dashboard.



*Review and Submit the Campaign*

### Create Smart Shopping Campaign Field Descriptions

FIELD	DESCRIPTION
Select your Google Merchant Center account	Specifies the Google Merchant Center account for the campaign.
	You cannot edit this setting after campaign creation.



### Create Smart Shopping Campaign Field Descriptions (cont.)


FIELD	DESCRIPTION	
Country to advertise in	Specifies the country of sale for the campaign. This setting limits which products from your Merchant Center inventory can be advertised in this campaign. It filters products based on the target country associated with the products.	
	<div style="border: 1px solid #ccc; padding: 5px; background-color: #fff9c4;">                     You cannot edit this setting after campaign creation.                 </div>	
Campaign Name	Specifies the Google Ads campaign name, which can be changed later.	
Daily Budget	Sets the approximate limit for how much you want to pay for your ads for a specific campaign, on average, per day. If you do not spend the entire amount each day, the remaining amount rolls over to the next day.	
Select Products for this Campaign	Determines how products are included in the Google Ads campaign. The products used come from the approved products in the Google catalog.	
	Select all products in my Google Merchant Center catalog	Adds all products in the GMC catalog in the ad campaign.
	Select Products Using Filters	Only products matching the designated filter (s) are included in the ad campaign.

## Managing Campaigns

Maintaining and running your campaigns may require editing settings such as targeted products and allocated daily budgets. Before making changes, be advised that Smart Shopping Campaigns have a learning period of two weeks for the Google AI to optimize performance of your ads. Every time you edit and modify a campaign's budget or assigned products, Google requires another two week re-learning period. If you have submitted product data for the first time or significantly updated existing data in your GMC account, Google may take up to two business days to review the new data. As a result, products in your campaigns may take time to also update.

Depending on conversions and seasons, you may also want to pause or end campaigns to run others, without constantly editing the same campaigns. All campaigns require manual actions to pause, enable (or run), and end. You can create many campaigns to prepare for different seasons and promotions, pausing them until ready to cycle the campaigns.

See the following sections to manage and update your campaigns.

 **Have questions?** Check out the Google Shopping ads Channel [FAQ](#) and [best practices](#) topics to better understand Google and Magento integrations. You can also perform a search for [Google Shopping ads](#) in the Magento Help Center for additional troubleshooting topics.

### To edit a Smart Shopping campaign:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. For a specific campaign, tap **Select** in the **Actions** column, then tap **Edit**.
3. The campaign opens with the following content:

FIELD	DESCRIPTION
Select your Google Merchant Center account	Cannot be modified. Specifies the Google Merchant Center account for the campaign.
Country to advertise in	Cannot be modified. Specifies the country of sale for the campaign. This setting limits which products from your Merchant Center inventory can be advertised in this campaign. It filters products based on the target country associated with the products.
Campaign Name	Specifies the Google Ads campaign name, which can be changed later.
Daily Budget	Sets the approximate limit for how much you want to pay for your ads for a specific campaign, on average, per day. If you do not spend the entire amount each day, the remaining amount rolls over to the next day.
Select Products for this Campaign	Determines how products are included in the Google Ads campaign. The products used come from the approved products in the Google catalog.

FIELD	DESCRIPTION
Select all products in my Google Merchant Center catalog	Adds all products in the GMC catalog in the ad campaign.
Select Products Using Filters	Only products matching the designated filter(s) are included in the ad campaign.
Select Products Using SKUs	Only selected products are included in the ad campaign.

4. After making changes, tap **Publish Campaign**.

### To manage campaign status:

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.
2. For a specific campaign, tap **Select** in the **Actions** column, then select an action.

ACTION	DESCRIPTION
Enable	Activates a campaign and begins running ads. The status sets to Active.
Pause	Deactivates a campaign without ending it. It remains inactive due to being paused, not running again until enabled. The status sets to Paused.
End	Concludes or ends the campaign. The date clears.

3. The campaign status updates on the screen and syncs to Google. Depending on the action selected, the campaign may require additional time to complete updating.

## Campaign Reporting

As your ads run, Google tracks all clicked ads links through to converted sales. Aggregated totals provide quick insight to your sales to determine the effectiveness of your ads, attractive products and prices, and costs per ad. Google Shopping ads Channel provides two options for reviewing your Smart Shopping campaigns through the Magento Admin or **Magento Business Intelligence**.

## Magento Reporting

When accessing Google Shopping ads Channel, the dashboard provides aggregated reporting at the account level for the past 14 days (not including the current day). At a glance, learn more about the following:

- Calculated aggregated reporting of all costs and sales collected for your Google Ads Smart Shopping campaigns
- Campaign details and status for the entire run of the campaign
- Action options to modify and manage your campaigns

The screenshot shows the 'All Ad Campaigns' dashboard for the period of Mar 22 - Apr 5, 2019. The summary statistics are: Cost: \$45,000, Return on Ad Spend (ROAS): \$2.33, Conversion Value: \$10,970, and Conversions: 27. Below the summary is a table listing individual campaigns with columns for Campaign Name, GMC ID, Products, Daily Budget, Cost, Clicks, Conversions, Conversion Value, Launch Date, Status, and Actions.

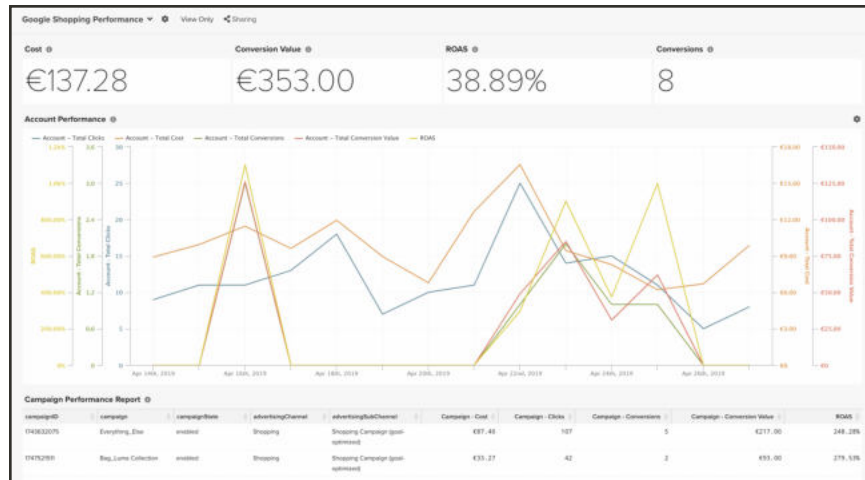
Campaign Name	GMC ID	Products	Daily Budget	Cost	Clicks	Conversions	Conversion Value	Launch Date	Status	Actions
Summer Fashion	763456	344	\$500	\$198	57	14	\$277	07/02/2018	Active	Select
Discount All	656783	875	\$1500	\$250	111	53	\$4753	07/02/2018	Active	Select
Swimwear Promo	789034	56	\$200	\$87	78	42	\$434	—	Ended	Edit
Activewear Sale	895678	73	\$100	\$110	210	57	\$3235	07/02/2018	Paused	Pause
Maxi Dresses	027304	22	\$50	\$44	45	24	\$123	—	Ended	End
Waterbottles	028126	1500	\$125	\$100	222	78	\$1037	—	Ended	Select
Coats Sale	817046	84	\$640	\$500	12	31	\$234	07/02/2018	Paused	Select
Sweaters Sale	015441	27	\$720	\$430	19	21	\$768	—	Ended	Select

Ad Campaigns Dashboard

## Magento Business Intelligence Reporting

Expand your reporting options with Magento Business Intelligence (MBI). We provide links to create a new account, or request to activate Google Shopping ads Channel reports on an existing account. To get started with MBI, select one of the linked options. MBI Essentials provides a Google Shopping Performance Dashboard to review the aggregated results of your Smart Shopping campaigns. MBI Pro provides the features of Essentials and additional options to add data sets to further enhance reporting.

- Account performance
- Campaign performance
- Product performance
- Product Partition (group) performance



Campaign Performance Report



Conversion Reports



## CHAPTER 38: Amazon Sales Channel

Amazon Sales Channel in Magento is a powerful, comprehensive extension that enables Magento merchants to seamlessly sell products in the Amazon Marketplace, the world's largest global internet shopping destination. This native extension enables Amazon sales by integrating Magento with your Amazon Seller Central account and providing both automation and synchronization of product and order data. Completely manage all product listings, implement simple or complex pricing rules, and maintain your orders and inventory through a single dashboard.

Getting started is easy. Complete an onboarding process to create an Amazon Seller Central account and integrate with your Magento catalog to manage Amazon listings, orders, inventory, and fulfillment. A central dashboard displays status updates for all store integrations and listings. Reach new customers in the global Amazon Marketplace with simplified and automated processes – all at little or none of the cost and labor of setting up a new system.

After integrating your Amazon Seller Central account, Amazon Sales Channel enables you to manage your accounts and syncs data between Magento and Amazon. Amazon Sales Channel gives you the ability to create listings, manage promotions, set prices, and manage inventory and fulfillment directly through the Magento Admin. These options include pricing rules that monitor Amazon pricing for the same item and automatically adjusts your prices to be more competitive.

This guide reviews some basic Amazon Seller Central information, the requirements for setting up your Amazon Sales Channel, the onboarding and setup process, and the ways in which you can use Amazon Sales Channel to manage your products and sales in the Amazon marketplace.



### Getting Started with Amazon Sales Channel

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Learn more about Amazon and Amazon Sales Channel basics, key features, best practices, and more.



## Onboarding Amazon Sales Channel

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Quickly setup and integrate Amazon Seller Central and Magento with a guided onboarding process. Get your Amazon Sales Channel up and running to start selling.



## Amazon Sales Channel Home

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Learn more about your Amazon Sales Channel Home dashboard and options available. Access and manage store configurations, listings, and more.



## Managing Attributes

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Amazon Sales Channel maps products between your Magento catalog and Amazon using product attributes. Learn more about creating, mapping, and managing those attributes.



## Managing Amazon Listings

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As you continue selling through the Amazon Marketplace, you may need to update, add, and manage your listings. Learn more about reviewing the status and completing updates.

- [Managing Listing Settings](#)
- [Managing Listing Rules](#)
- [Managing Listing Pricing](#)
- [Managing Listings](#)



## Managing Orders and Fulfillment

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Amazon Sales Channel supports order fulfillment and shipments through Amazon and Magento. Learn more about fulfilling through Amazon, directly through Magento, and order management options.





## Logs and Reports

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Learn more about tracked errors and interactions between Amazon and Magento.

# Getting Started with Amazon Sales Channel

Amazon Sales Channel integrates Magento with your Amazon Seller Central account. Learn more about key features and integrations.

## About Amazon Sales Channel

Amazon Sales Channel is a powerful extension that seamlessly integrates your Magento Admin with your Amazon Seller Central account. Once integrated, Magento becomes a "central command center" for managing listings, monitoring orders and inventory, and controlling pricing for your Amazon store.

The integration connects Magento and Amazon to sync data between both platforms. Amazon Sales Channel enables you to:

- **Onboard** and integrate one or more Amazon Seller Central accounts with Magento.
- Import and sync your existing Amazon listings into your Magento catalog.
- Create and manage Amazon listings for your Magento catalog products.
- Review and fulfill (ship) orders in Magento and Amazon, syncing order status and refunds.
- Review logs for analysis and errors for **competitive prices**, **listing changes**, and **communication issues**.

Manage and review all of these features, account information, listings, orders, and more on the [Amazon Sales Channel Home](#) central dashboard.

## Promotions and Pricing

With Amazon Sales Channel, you can:

- Synchronize Amazon listing pricing to Magento catalog price (or alternate price attribute)
- Enable MSRP strike-through pricing to increase customer value proposition
- Enable and manage Minimum Advertised Price (MAP)
- Apply additional VAT tax
- Set a custom value for "available quantity" to display with listings to increase buyer urgency

## Pricing Rules

With Amazon Sales Channel, you can:

- Create stackable, flexible, and complex rules to manage listing prices
- Create and manage pricing rules for everyday sale or seasonal promotions
- Create price floors to protect your lowest price
- Create and manage intelligent pricing rules that will automatically adjust your product pricing relative to other Amazon competitors (lowest Amazon competitor and Amazon Best Buy Box price)

## Catalog Feed Management

With Amazon Sales Channel, you can:

- Import your existing Amazon listings (products) and match to existing or create new products in your Magento catalog
- Publish your Magento products to Amazon to create new Amazon listings
- Create overrides to set an individual price, handling time, condition, and seller notes message
- Import and match your Amazon product attributes for automatic product matching with your Magento catalog
- Set multiple search parameters to match Amazon listings to your Magento catalog
- Set extensive rules to determine which of your Magento products are eligible to be listed on Amazon
- Set a default handling time for your new Amazon listings
- Match listing conditions based on a Magento attribute
- Add seller notes for each condition type (optional)
- Implement quantity thresholds when importing Amazon listings into your Magento catalog
- Create overrides for a group of products
- View recommended listing improvements

## Order Management and Customer Service

With Amazon Sales Channel, you can:

- Support and process orders in Amazon and Magento
- Import your Amazon orders into Magento
- Define which of your Magento website stores to associate with your Amazon orders for importing and managing orders

- Review, cancel, and ship orders from Magento and/or Amazon depending on the selected fulfillment
- Map your Amazon order status to custom status within Magento (optional)
- Review and manage order errors, resolving issues and connecting with customers
- Send order tracking data to your Amazon Seller Central account
- Cancel orders and select a reason response
- View the last order action for your Amazon orders

## Reporting

With Amazon Sales Channel, you can review report information about:

- Listings by statuses of active, inactive, eligible, and incomplete
- Orders awaiting shipment
- Most recent orders
- Amazon listings action log to review overall feed changes (price, quantity, etc.)
- Product listing detail log to view individual product changes
- Product Best Buy Box Competitor Pricing data
- Product Lowest Competitor's Pricing data

## Support for Global Sales

With Amazon Sales Channel, you can:

- Manage multiple Amazon Marketplace regions all from your Magento Admin
- Support multiple currencies using the Magento Currency Conversion Tool
- Manage shipments from your product locations and Amazon fulfillment centers

## Customer Management

With Amazon Sales Channel, you can build your Magento customer database by importing customer data associated with your Amazon orders. Leverage and expand your marketing potential through this expanded list of customers through your Amazon Marketplace listings and Magento storefront.

## About Amazon Marketplace

Amazon Marketplace is an e-commerce platform owned and operated by Amazon that enables third-party sellers to sell new or used products. Using Amazon Marketplace, third-party sellers gain access to Amazon's world-wide customer base. Those who list products on Amazon for sale, including Magento users, are defined by Amazon as "third-party sellers."

Third-party sellers of any size can create an Amazon Seller Central account and use the Amazon Marketplace to reach Amazon's global customer base. Once an account is created and active, sellers can add and list products for sale, manage orders and inventory, and fulfill orders.

## Amazon Listings

Amazon listings contain categories of information: Product Information and Listing Information.

### Product Information

Product information provides data common to every instance of the same product listed on Amazon. For example, several sellers may list a particular brand of yoga pants on Amazon. The general details about the product, such as the name and model number, are the same each time the product is listed. When more than one seller contributes data to a product, Amazon determines which seller's product information will be displayed on the product detail page.

### Listing Information

Listing information provides seller-specific information about products. These details often differ from other sellers' listing for the same product. For example, you may sell the same yoga pants as another seller, but your item number, condition, price, or shipping method time may be different. These details are unique to your listing for the product.

If you want to contribute product information or correct erroneous information on a product detail page, refer to [Amazon: Product Detail](#).

## Amazon Fulfillment

Amazon offers two options for order fulfillment and shipping to third-party sellers:

- **Fulfilled by the merchant (FBM):** Third-party sellers store their own inventory. When a customer places an order, the seller handles the packaging and shipping to the customer. This option allows you to complete shipments through Magento or another third party.
- **Fulfilled by Amazon (FBA):** Third-party sellers store inventory in Amazon's fulfillment centers around the world. When a customer places an order, Amazon handles the packaging and shipping to the customer. Order details and status are sent to Magento.

Amazon Sales Channel supports both options, receiving and tracking these orders through the Magento Admin. As you complete fulfillment, status updates automatically. For complete details, see [Fulfillment Workflows](#).

## Before selling on Amazon

Amazon follows a set of policies and workflows to ensure all sellers and products adhere to specified guidelines. To best ensure your products and account are approved and eligible for listing, we recommend reviewing the following information and policies:

- [Help for Amazon sellers](#)
- [Product detail page rules](#)
- [Shipping policies](#)

- [Policies and agreements](#)
- [Selling policies](#)
- [Prohibited seller activities and actions](#)

## About Amazon and your Magento Catalog

Your Magento back end includes a catalog with all products and associated settings and information (images, options, prices, and more) and order and shipping configurations. Your Amazon Seller Central account also has a catalog and order configurations, tracking strictly your sales through the Amazon Marketplace.

To better manage and review your product catalog and sales through one location, Amazon Sales Channel imports your Amazon listings into your Magento backend, continually syncs with products and sales, and reports issues and trends. It supports integrations with multiple Amazon Seller Central accounts, tracking all data through the single interface for multiple storefronts.

### Product Attributes

Magento manages catalog syncs with the use of product **attributes** to define product settings and data. Amazon also uses attributes, to be mapped through onboarding. During **pre-setup tasks** for Amazon Sales Channel, you will define additional Amazon attributes if needed to ensure correct product mappings when importing your Amazon listings into your Magento catalog. These attributes include UPC, EAN, ISBN, and ASIN (Amazon Standard Identification Number). Through onboarding, products sync between Amazon and Magento catalogs using your attributes, especially these. Proper mapping of your Magento and Amazon products ensures a continual synchronization of product information, orders, and inventory.

If you do not have these attributes created or configured for your catalog, we recommend adding a **Magento Product attribute** and values to your products prior to onboarding. Once an Amazon attribute is imported, it can be used for search, navigation, price rules, and much more. For more information on these attributes, see [Amazon: What are UPCs, EANs, ISBNs, and ASINs?](#)

After onboarding, you can manage and update your product attributes and Amazon mappings at any time.

### Product Listings

An Amazon listing is a product page for every product you sell through the Amazon Marketplace, displaying product descriptions, prices, images, and more mapped through attributes. During onboarding, you can configure your Magento products can be automatically published to Amazon listings. You can also import your existing Amazon listings by mapping them to your Magento products.

When you have created a listing Magento products, they are submitted to Amazon for approval. Most successful listings are approved within a few hours. If your listing is approved, it will display in the Amazon Marketplace for immediate orders by customers. The Amazon

Sales Channel provides a set of tabs to review Amazon listings. Depending on the issue or required data, you may need to review your Amazon Seller Central account for specific details on these listings.

- **Active:** Lists approved product listings available through the marketplace.
- **Ready to List:** Lists products meeting listing rules requirements and ready to publish to Amazon.
- **Inactive:** Lists products not available on the marketplace due to being blocked for a specific reason (such as branding issue), closed and requiring relisting, etc.
- **Ineligible:** Due to the listing rules, lists product that cannot be actively listed on the marketplace (such as 0 quantity, sell dates, etc).
- **Incomplete:** Lists products missing required information. Update the product data for another review.
- **Ended:** Lists product listings eligible for listing but manually removed from Amazon. You can relist these products.

## Syncing Data

Magento communicates product and order data between your Amazon Seller Central account and the Magento backend. The constant updates provide a single source through Magento to manage and maintain your inventories, fulfilling orders, tracking sales, and reducing overhead and duplication of work. Reporting captures the latest data for tracking trends and resolving communication issues caught between the two systems.

All syncing is managed by a cron job, set to update every five minutes.

## Amazon Sales Channel: Best Practices and Limitations

Best practices include:

- Amazon Sales Channel is powerful and can affect your Amazon listings by increasing or decreasing prices, synchronizing product information (including available stock), and adding, updating, and ending (deleting) listings. You should review your listings by status during your setup and adjust your settings ([listing settings](#), [listing rules](#), [pricing rules](#), [overrides](#), etc) before completing your store setup. These settings can also be modified after setup, as needed.
- Amazon Sales Channel can set your pricing rules to automatically adjust your listing price. Automated pricing safeguards include the [Floor Price](#) and [Optional Ceiling Price](#) features of [Intelligent repricing rules](#). Use of these safeguards helps ensure that your listing prices do not go below your cost or above a defined price.

- Data syncing between Amazon Sales Channel and Amazon is controlled by your **Magento cron** settings. Built-in throttling between Magento and Amazon help to ensure smooth and efficient data transmission, but during high eCommerce traffic times (such as Black Friday), Amazon's systems may take longer than usual to update. It is recommended to set your Magento cron to run once every five minutes.
- Amazon Sales Channel imports your Amazon order information. To manage your Amazon orders in Amazon Sales Channel, you must ensure that your **order settings** are defined to import and create a corresponding Magento order for each Amazon order. If this is not defined, you will only be able to view your Amazon order information.
- All taxes for sales through Amazon are still managed and remitted via your Amazon Seller Central account. In some states, Amazon is required to automatically collect and remit taxes. For other states, sellers have the option of calculating taxes manually or automatically. See **Amazon: Tax Policies**. You may be required to log into your Amazon Seller Central account to view Amazon Tax Policy documentation.

Limitations include:

- Bundle, gift card, and grouped product types that are part of your Magento catalog are not supported by Amazon Sales Channel for listing to Amazon.
- Amazon Sales Channel cannot create a listing for a product that does not have an existing or previous Amazon listing. If a product does not already exist in Amazon Seller Central with an ASIN, it must be added in Amazon Seller Central so that Amazon can assign the product an ASIN. Once a product is added in Amazon and a listing is created, the listing can be matched to your catalog in Amazon Sales Channel and synced.

## Onboarding Amazon Sales Channel

This section describes the requirements and pre-setup tasks for the onboarding process and helps you create, connect, and integrate your Amazon Sales Channel store. Onboarding is simple and fast, after you understand some key concepts how Amazon works with the Amazon Sales Channel in Magento.

Amazon Sales Channel supports the creation of multiple Amazon Sales Channel stores. For a single Amazon Seller Central account that operates in the Amazon region that includes U.S./Canada/Mexico, you will create three Amazon Sales Channel stores (one for U.S. sales, one for Mexico sales, and one for Canada sales). Each of the three stores will define the region during its setup and be integrated with the same Amazon Seller Central account. If you have more than one Amazon Seller Central account, you could potentially have up to three Amazon Sales Channel stores for each of your Amazon Seller Central accounts.

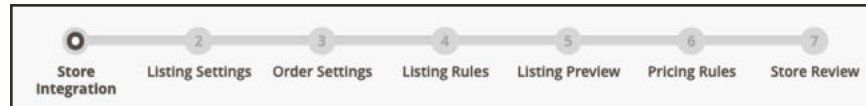
### Helpful tips for onboarding!

Amazon Sales Channel requires a **Professional Seller account** on Amazon Seller Central, in the North America region. Amazon charges a monthly subscription and fees for selling. See **Amazon: Choose your selling plan**.

Your progress through the onboarding process saves as you tap save options or **Next** through the steps. Your integration is fully complete when you tap **Complete Setup**. We recommend completing all of these instructions to fully save your configurations.

Until your account and integration is active, your status is "In Setup". If you access your integration to edit settings and configurations, you return to onboarding with your currently saved configurations.

Your Amazon Sales Channel settings affect your Amazon listings. You can review your listings during setup and make any changes before completing your setup and publishing your listings in [Store Review](#). You can also modify your Amazon Sales Channel settings after your setup is complete.



STEPS	WHAT HAPPENS
<b>Pre-Setup Tasks</b>	Before you begin onboarding, you must ensure you have an active and approved Amazon Seller Central account. There are also some Magento requirements and recommendations to complete prior to onboarding.
<b>Verify Amazon API Key</b>	When accessing Amazon Sales Channel, Magento automatically checks and validates the Amazon API key you have added in your store configuration. If your API key has not been added or is invalid, you will be prompted to add or update your Amazon API Key.
<b>Step 1: Store Integration</b>	The first step is to create an Amazon Sales Channel store and connect your Amazon Seller Central account. You need the primary log-in credentials for your Amazon Seller Central account (the email or phone used to create the seller account).
<b>Step 2: Listing Settings</b>	Configure the interaction settings between your Magento catalog and Amazon listings. These listing settings include attribute mappings between Magento and Amazon, fulfillment, quantity thresholds, and more.
<b>Step 3: Listing Rules</b>	Configure listing rules to define which Magento catalog products are eligible to be listed on the Amazon marketplace. You have a number of options to include and exclude products, for example automatic creation of listings for new eligible products and exclusion of existing Amazon products setting them to ineligible.
	<div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">                     You select and configure the website for this integration in this step.                 </div>



STEPS	WHAT HAPPENS
<b>Step 4: Listing Preview</b>	<p>With your listing rules finalized, review your Magento catalog products as Amazon listings.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p><b>Important!</b> After you continue to <b>Listing Preview</b> (step 4), you cannot change the website selected for the integration. To change the website, you will need to remove this integration and begin a new one.</p> </div>
<b>Step 5: Order Settings</b>	<p>Order handling settings control important information related to how Amazon orders will be processed within Magento. Orders will be imported from the time of integration, while past orders will not be imported into Magento unless they are in an "Unshipped" status when the store was integrated.</p>
<b>Step 6: Pricing Rules</b>	<p>Define pricing rules to automatically adjust your Amazon listing prices, based on a beginning price source attribute. Additionally, you can stack multiple rules and use intelligent pricing to adjust your Amazon listing price based on competitors' <b>Buy Box Price</b> or <b>Lowest Competitor Price</b>.</p>
<b>Step 7: Store Review</b>	<p>Review all of your settings before launching your store. Until you tap <b>Complete Setup</b> in Store Review, your store is in "In Setup" status, and you can review and modify most of the settings configured in steps 2-6. After you complete setup, you can access your store and listing settings on the store's <b>dashboard</b>.</p>

## Pre-Setup Tasks

Before starting your **onboarding tasks** with **Store Integration**, you must ensure that your Amazon Seller Central account and your Magento account are ready for the integration. To achieve a successful integration and setup, we have outlined some required pre-setup tasks.

Every time you set up a new Amazon store, a list of set up tasks display. We recommend reviewing and completing these tasks the first time you set up a store.

1. In the Admin sidebar, tap **Marketing**. Then in the Channels section, tap **Amazon**.
2. On the Amazon Sales Channel Home page, tap **Setup Amazon Store**.
3. Review and verify you have completed these tasks and configurations.

When you complete the pre-setup tasks and recommendations, you are ready to set up your Amazon Sales Channel store through **onboarding**. Tap **Begin Setup** on the Pre-Setup Tasks screen.

## 1. Enable background tasks in Magento.

All products and data synced between Magento and Amazon is managed by the cron. When you complete tasks like add or update listings and receive orders, a cron job sends and receives data between your Magento backend and your Amazon Seller Central account.

- [Enable Magento cron](#).
- For maximum performance, [set Magento cron](#) to run once every five minutes.

## 2. Create your Amazon Seller Central account.

Before you begin to set up your Amazon Sales Channel, you must have an active Amazon Seller Central account. If you don't have an existing Amazon Seller account in the [North America](#) (US, CA, MX) region, you can complete Amazon's seller account set up process.

Amazon Sales Channel requires a [Professional Seller account](#) on Amazon Seller Central, in the North America region. Amazon charges a monthly subscription and fees for selling. See [Amazon: Choose your selling plan](#).

## 3. Make sure you are an approved seller on Amazon.

To integrate, you must have an approved Amazon Seller Central account. Your account must not have any restrictions existing on your account for products or categories. Some products and categories require approval prior to creating listings. Review Amazon policies for category and product approval to ensure your products will be approved. See [Amazon: Categories and products requiring approval](#).

It is also important to ensure that you have configured the following in your Amazon Seller Central account:

- Ensure your return policy is as good or better than the Amazon return policy. See [Amazon: Return Policy](#)
- Ensure your tax settings are configured. See [Amazon: Tax Policies](#).
- Ensure that your shipping methods are configured accurately. To set up the shipping methods that Magento will offer to customers to fulfill your Amazon orders, update the [Amazon: Shipping Settings](#) in your Amazon Seller Central account.

## 4. Increase the number of automatic catalog matches.

During onboarding, Amazon Sales Channel uses product attributes to match your existing Amazon listings (if applicable) to existing products in your Magento catalog. After onboarding, these product attributes are used to publish your Magento catalog items to an Amazon listing and to sync your product data between Magento and Amazon.

To have the highest number of Magento products automatically match with Amazon listings, we recommend creating a set of product attributes to your Magento catalog. Before you set up your Amazon Sales Channel store, we recommend adding Magento product attributes to match these Amazon attributes, for example: ASIN, EAN, ISBN, UPC, or GCID. See [Onboarding: Create a product attribute in Magento](#).

### 5. Configure your currency and conversion (as needed).

If your Amazon store uses a different currency than is configured for your Magento store, [enable the currency](#) and set the [currency conversion rate](#).

### 6. Create a Product Condition attribute (as needed).

If your Amazon listings contain more than one product condition (new, used, like new, etc), create a Magento attribute and assign condition values. You will need to map this attribute during onboarding to the Amazon Condition product attribute. See [Creating Attributes for Amazon](#).

### 7. Configure your Amazon Seller Central shipping method.

To set up shipping methods that you will offer to fulfill your Amazon orders, refer to [Settings > Shipping Settings](#) in your Amazon Seller Central account.

## Additional configurations

Once your Amazon account is set up and active, there are several Magento recommendations that will help streamline the Amazon Sales Channel onboarding process.

#### Review and note any products you don't want to list on Amazon.

You may not want some products to be listed on Amazon. Amazon Sales Channel has a listing rule engine that is used to determine which products are eligible for publishing to Amazon. [Listing rules](#) allow you to select subsets of products to be published (or not published) to your Amazon Seller Central account, such as by category selection or by defining one or more product attributes. Like Magento [catalog](#) or [shopping cart](#) price rules, product attributes used for Amazon listing eligibility must be set to "Used for Promo Rule Conditions".

#### Set your Amazon Seller Central Region to Inactive.

To help facilitate error-free data transition during integration, we highly recommend setting your Amazon region to "Inactive" status in [Settings > Account Info > Vacation Settings](#). Refer to [Amazon: Listing Status for Vacations](#). Once your setup is complete, change the status back to "Active" in Amazon.

> [Continue to Verify API Key](#)

## Creating Attributes for Amazon

Prior to onboarding your Amazon Seller Central accounts, we recommend adding Magento [product attributes](#) to map your product listings. After you complete onboarding, you can manage your product attributes through the [Managing Attributes](#) tab of the [Amazon Sales Channel Home](#).

These instructions detail how to create Magento attributes for [Amazon ASIN](#) and [Amazon Condition](#). We recommend creating additional attributes including Amazon EAN, Amazon ISBN, and Amazon UPC. You may want to also create an Amazon Price attribute if you want to use your Amazon listing price as a price source for pricing rules. These attributes are used when

configuring your listing and pricing settings during onboarding. They are also be used when creating Amazon listings and when updating and syncing your Magento catalog with your Amazon listings.

Catalog Search settings enable you to set matching search parameters that help to map eligible Magento products with Amazon listings. Once mapped, Amazon activates actions related to pricing, quantity, overrides, and order and product synchronization.

Defining these values increases the potential for exact matches, minimizing the need to manually match product listings later. Adding the attributes as part of your onboarding **Pre-Setup Tasks**, Amazon Sales Channel has a higher potential for automatically matching your products during onboarding and syncs product data between Amazon and Magento after onboarding.

If you only create the Amazon ASIN attribute (without adding ASIN values per product), your Magento products may not automatically your Amazon listings will automatically. You can manually match your products through Store Review. However, manual matching does not create the data elements needed to share and sync your product data.

**Important:** If you manually matched a product and you need to update an ASIN, UPC, or other data element for the product, you would have to update the data in both places, in your Magento catalog and in your Amazon listing in your Amazon Seller Central account.

### To create the Amazon ASIN product attribute:

1. Log into your Magento Admin.
2. Tap **Stores** in the left-side menu. In the Attributes section, tap **Product**.
3. Tap **Add New Attribute** to display the Attributes Properties screen.
4. For **Default Label**, enter "Amazon ASIN" (the name for your attribute).
5. For **Catalog Input Type for Store Owner**, choose **Text Field**.
6. From the **Values Required** drop-down, choose **No**.

Although an Amazon ASIN is required to list a product on Amazon, some of your catalog products may not be listed on Amazon.

7. Expand the **Advanced Attribute Properties** section.
  - a. For **Attribute Code**, enter "amazon\_asin".
  - b. For **Scope**, choose **Global**.
  - c. For **Unique Value**, choose **No**.
  - d. For **Input Validation for Store Owner**, choose **None**.
  - e. For **Add to Column Options**, choose **Yes**.
  - f. For **Use in Filter Options**, choose **Yes**.

8. Tap **Save Attribute**.

The screenshot shows the configuration interface for an attribute. It is divided into two main sections: 'Attribute Properties' and 'Advanced Attribute Properties'.

**Attribute Properties:**

- Default Label:** Amazon ASIN
- Catalog Input Type for Store Owner:** Text Field
- Values Required:** No

**Advanced Attribute Properties:**

- Attribute Code:** amazon\_asin (Note: This is used internally. Make sure you don't use spaces or more than 30 symbols.)
- Scope:** Global (Note: Declare attribute value saving scope.)
- Default Value:** (Empty field)
- Unique Value:** No (Note: Not shared with other products.)
- Input Validation for Store Owner:** None
- Add to Column Options:** Yes (Note: Select "Yes" to add this attribute to the list of column options in the product grid.)
- Use in Filter Options:** Yes (Note: Select "Yes" to add this attribute to the list of filter options in the product grid.)

*Amazon ASIN Attribute***To create the Amazon Condition product attribute:**

1. Log into your Magento Admin.
2. Tap **Stores** in the left-side menu. In the Attributes section, tap **Product**.
3. Tap **Add New Attribute** to display the Attributes Properties screen.
4. For **Default Label**, enter **Amazon Condition** (the name for your attribute).
5. For **Catalog Input Type for Store Owner**, choose **Dropdown**.

The Manage Options (Values of your Attribute) section will display.

6. For **Values Required**, choose **No**.
7. For **Manage Options (Values for your Attribute)**, add each of your condition options.

Standard Amazon conditions include:

- New: Refurbished: Used
  - Like New: Used
  - Very Good: Used
  - Good: Used
  - Acceptable: Collectible
  - Like New; Collectible
  - Very Good: Collectible
  - Good: Collectible; Acceptable
- a. Tap **Add Option**.
  - b. Tap to check the Is Default radio button for the option you wish to be the default selection.
  - c. In the Admin column, enter the text for the label of the condition you are adding (New, Used, Used-Like New, etc.)
  - d. Tap **Add Option** to add more drop-down options, as needed.
8. Expand **Advanced Attribute Properties** section.
- a. For **Attribute Code**, enter "amazon\_condition".
  - b. For **Scope**, choose **Global**.
  - c. For **Unique Value**, choose **No**.
  - d. For **Input Validation for Store Owner**, choose **None**.
  - e. For **Add to Column Options**, choose **Yes**.
  - f. For **Use in Filter Options**, choose **Yes**.
9. Tap **Save Attribute**.

### Attribute Properties

Default Label \* Amazon Condition

Catalog Input Type for Store Owner Dropdown

Values Required No

### Manage Options (Values of Your Attribute)

Is Default	Admin *	Default Store View	CA Store View	
<input checked="" type="radio"/>	New			Delete
<input type="radio"/>	Used; like new			Delete
<input type="radio"/>	Used; very good			Delete
<input type="radio"/>	Used; good			Delete
<input type="radio"/>	Used; acceptable			Delete
<input type="radio"/>	Collectible; like new			Delete
<input type="radio"/>	Collectible; very good			Delete
<input type="radio"/>	Collectible; good			Delete
<input type="radio"/>	Collectible; acceptable			Delete
<input type="radio"/>	Refurbished			Delete

Add Option

### Advanced Attribute Properties

Attribute Code amazon\_condition  
This is used internally. Make sure you don't use spaces or more than 30 symbols.

Scope Global  
Declare attribute value saving scope.

Unique Value No  
Not shared with other products.

Input Validation for Store Owner None

Add to Column Options Yes  
Select "Yes" to add this attribute to the list of column options in the product grid.

Use in Filter Options Yes  
Select "Yes" to add this attribute to the list of filter options in the product grid.

## Verify the Amazon API Key

When accessing Amazon Sales Channel, Magento automatically checks and validates the Amazon API key you have added in your store configuration. If validated, then you can move on to the next step, [Store Integration](#).

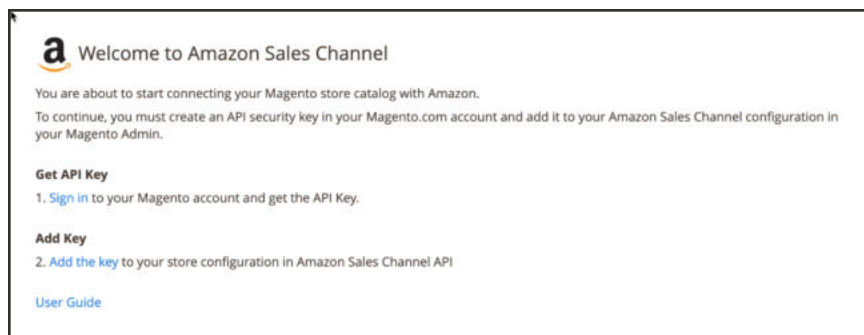
If the Amazon API key is missing, invalid, or expired, you must update your key. A message displays prompting you to get an API key and to add they key to your Amazon Sales Channel configuration.

### To get and add the Amazon API key as prompted:

The API key is validated each time you access your Amazon Sales Channel.

1. On the Admin sidebar, tap **Marketing**. Then under Channels, tap **Amazon**.

If you need an to update your API key, the following screen displays to prompt you through the process.



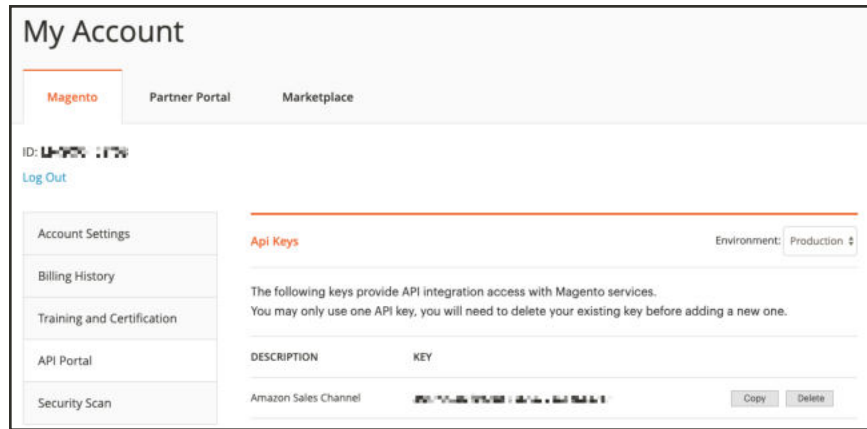
*Update the Amazon API Key Prompt*

2. Tap **Sign in**. The [Magento Accounts](#) page displays in a new browser tab. If you are logged into your Magento account, the API Portal section of the My Account page displays automatically. If you are not logged it, you are prompted to enter your Magento username and password before the API Portal tab displays.

If you need to create a Magento account, visit [here](#) and register. This account should be part of your company or business.

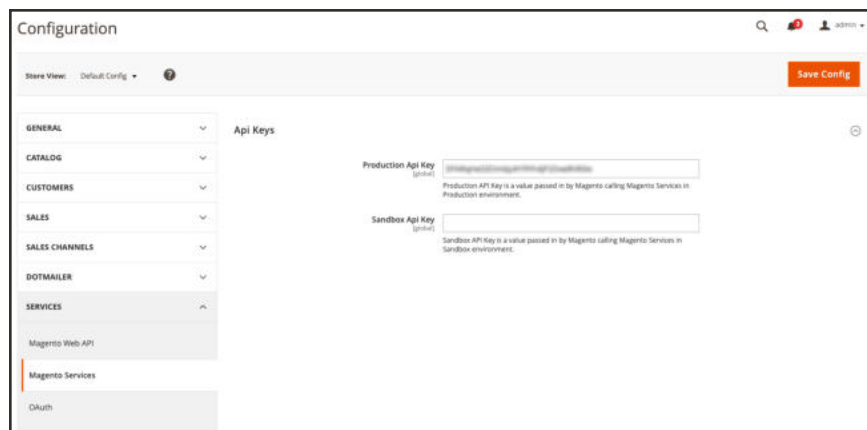
3. API keys can be viewed and generated on the **API Portal** tab in your Magento account. If you need to create a new API key, ensure the **Environment** drop-down is set to "Production." Then enter a description like "Amazon Sales Channel" and tap **Add New**. The new key is generated and displayed with the name you entered. Tap **Copy** to copy the new key.





*Generate or Copy an API Key*

4. With the new key generated and copied, return to the Amazon Sales Channel browser tab. On the Welcome to Amazon Sales Channel screen, tap **Add Key**. The browser exits Amazon Sales channel and displays the Magento Services tab in your store configuration page.
5. Paste the copied key into the **Production Api key** field.
6. Tap **Save Config**. You can now return to Amazon Sales Channel.



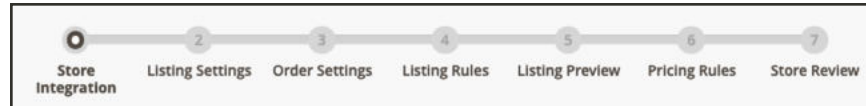
*Add your API Key in the Magento Services screen in your Store Configuration*

7. On the Admin sidebar, tap **Marketing**. Then under Channels, tap **Amazon**. Magento verifies and validates your API key and allows you to continue with setup. If the verification screen displays again, repeat the process.

> **Continue to Store Integration**

# Store Integration

**Step 1 of 7** for **Onboarding Amazon Sales Channel**



To begin, create an Amazon Sales Channel store and connect it to your Amazon Seller Account. This integrates your Magento and Amazon accounts to share data, sync products, and more. You need your Amazon Seller Central account credentials to complete this step. You cannot continue with onboarding until you connect your stores.

After integrating your Amazon account, you will be prompted annually to renew your Amazon Sales Channel connection to Amazon by granting access again.

## To integrate with Amazon:

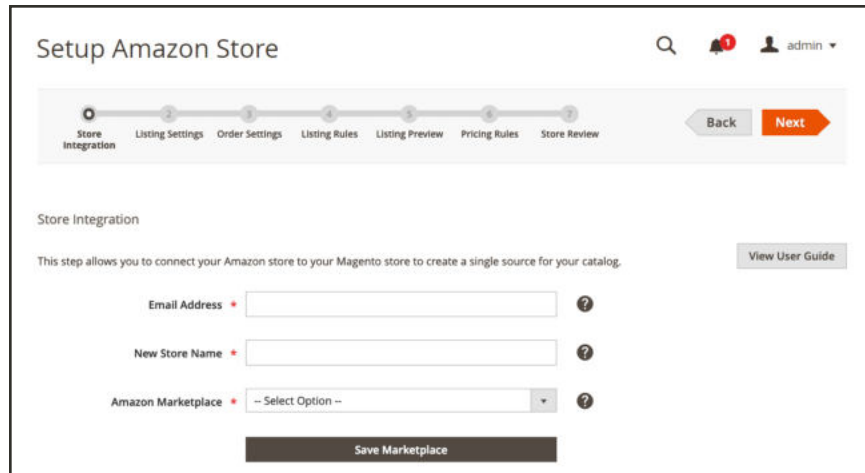
1. In the Admin sidebar, tap **Marketing**. Then in the Channels section, tap **Amazon**.
2. Tap **Setup Amazon Store**.

A list of **Pre-Setup Tasks** displays with an overview of prerequisites. When ready, tap **Begin Setup**.

3. For **Email Address**, enter your preferred contact email address.
4. For **New Store Name**, enter a descriptive name for your new Amazon Sales Channel store.

This name is used as a Magento reference only and will identify the store in the list on the Amazon Sales Channel Home page. You will want to make it something your team can easily identify. For example, your Amazon store that sells in the United States region might be named "Amazon Store USA".

5. From the **Amazon Marketplace** drop-down, select the region in which for your Amazon store sells.
6. Tap **Save Marketplace**. Your new marketplace is saved. Next, connect your new store with your Amazon Seller Central account.



*Create your Sales Channel Store*

7. Tap **Connect to Amazon Store** to launch Amazon Seller Central in a new tab.
8. Enter your Amazon Seller Central account credentials and tap **Sign in**.

To complete this connection, you must sign in to your Amazon Seller Central account using the log-in credentials for the primary user (the email or phone used to create the seller account).

9. Complete the Amazon Two-Step Verification by entering the code you receive from Amazon and tap **Sign in**.
10. Tap **Continue** on the Amazon Marketplace Web Service confirmation screen.

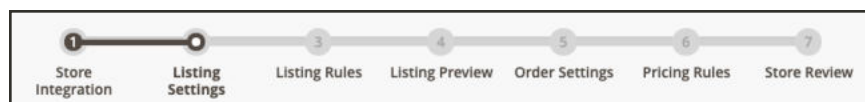
You have granted Amazon Sales Channel permission to access and share data with your Amazon Seller Central account. The Amazon screen closes. A confirmation message displays for the integration.

11. Tap **OK** for the confirmation. Then tap **Next**.

> **Continue to Step 2 of Onboarding**

## Onboarding: Listing Settings

**Step 2 of 7** for **Onboarding Amazon Sales Channel**



If you are managing a store that is in "Active" or "Inactive" status, see **Listing Settings**.

Listing settings are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing settings for a store during setup in the **Amazon Stores** tab in Amazon Sales Channel Home. Tap the store's name in the store list to display the store's onboarding progress. Tap **Listing Settings** in the progress bar.

Listing settings define how your Magento catalog products are listed on Amazon. Your listing settings consist of several categories that allow you to define the interactions and communication between Amazon Sales Channel and your respective Amazon Seller Central account.

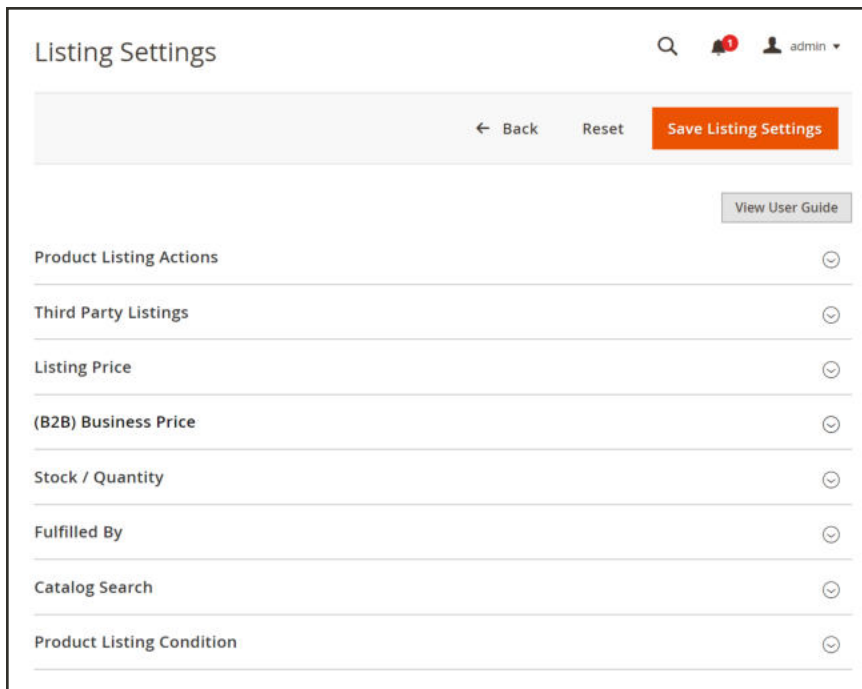
When configuring your listing settings, you define your eligibility rules for your Magento catalog products to automatically published to Amazon as new listings, set up your Amazon listing prices based on your Magento catalog or on competitor pricing, define your fulfillment method, and more.

Settings are grouped and available in sections, to expand and configure as needed.

### To configure listing settings:

1. Expand each section to review and configure listing settings. Complete all required fields to continue.
  - **Product Listing Actions:** Defines if eligible Magento products automatically publish to Amazon and the default handling time for shipments (2 is default).
  - **Third Party Listings:** Defines if Amazon Seller Account product listings should be imported into your Magento catalog.
  - **Listing Price:** Cap Magento pricing attributes and configure pricing settings.
  - **(B2B) Business Price:** Define your tiered-pricing settings when selling to another business.
  - **Stock / Quantity:** Configure your stock management thresholds for inventory management.
  - **Fulfilled By:** Define who fulfills orders.
  - **Catalog Search:** Configure your search parameters to ensure a reliable process for matching your Magento catalog products with your Amazon product listings.
  - **Product Listing Condition:** Configure your settings and values for product "condition." Condition is a product detail that is required by Amazon, but is not required for your Magento catalog products.
2. Tap **Next** to save settings and continue to **Listing Rules**.

Onboarding steps and sections can be reviewed and modified as much as needed, until you tap **Complete Setup** in the Store Review step. Once setup is complete, these settings can be accessed and modified from the dashboard for the sales channel store.

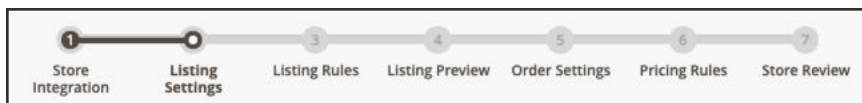


Listing Settings

> **Continue to Step 3 of Onboarding**

## Onboarding: Product Listing Actions

**Step 2 Options** for Listing Settings



If you are managing a store that is in "Active" or "Inactive" status, see [Product Listing Actions](#).

The Product Listing Actions section defines how your catalog interacts with Amazon. These settings include:

- Indicate if your Magento catalog products that meet Amazon eligibility requirements are automatically sent to your Amazon Seller Central account to create new listings.
- Set the default handling time for an order. This value defines the number of days generally required for you to process and ship an order. For example, if someone selects 2-day shipping, that shipping transit time does not start until processing completes and packages are handed off to a carrier. The total delivery time is (handling time + transit time + any holidays).

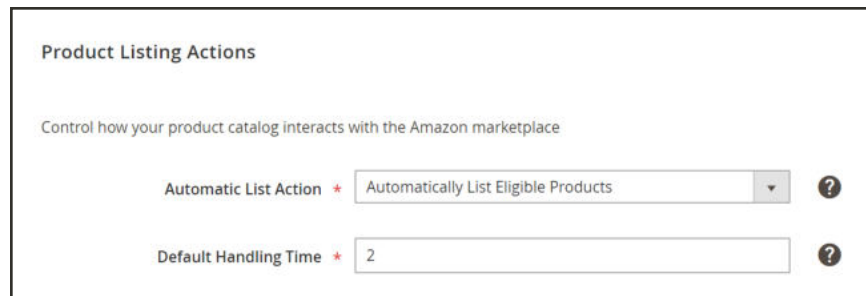
These settings are part of your store's **Listing Settings**. Update these configurations during onboarding through the [Listing Settings](#) step.

### To configure Product Listing Actions settings:

1. Expand the **Product Listing Actions** section.
2. For **Automatic List Action** (required), choose an option in drop-down:
  - **Automatically List Eligible Products:** Select this option if you want your Magento catalog products (that meet Amazon's eligibility requirements) to automatically push to Amazon and create new Amazon Listings.
  - **Do Not Automatically List Eligible Products:** Select this option if you want to manually select your eligible Magento catalog products and create new Amazon Listings. When selected, catalog products that meet your listing criteria and contain all required information display on the Ready to List tab for manual publishing. If not selected, the Ready to List tab does not display.
3. For **Default Handling Time** (required), enter a numerical amount of lead time days needed before shipment. The default value is 2 days.

This default handing time value is only effective for Amazon listings created through Amazon Sales Channel. Any Amazon listings that were created in your Amazon Seller Central account use the default handling time set for the listing in Amazon.

4. When complete, continue to the **Third Party Listings** section.



*Product Listing Actions*

## Onboarding: Third Party Listings

### Step 2 Options for Listing Settings



If you are managing a store that is in "Active" or "Inactive" status, see **Third Party Listings**.

The Third Party Listings section defines if your Magento catalog will import products from your existing Amazon Seller Central listings. We recommend importing listings from Amazon, to ensure all listings have matching Magento products. By having your listings as part of your

Magento catalog, you can manage all of your products from a single catalog and leverage Amazon Sales Channel features including fulfillment and order management with Amazon, intelligent repricing, and quantity management.

When you set to "Import listing", Amazon Sales Channel imports your Amazon listings into your Magento catalog, attempting to match them to existing products. If a match is not automatically found, you can import the Amazon listing as a new Magento product or manually match the listing to a product.

If you select to import listings, select the Magento attributes with values for Amazon Seller SKU and Amazon ASIN. If you do not have Magento **product attributes**, consider creating and assigning them. Mapping these attributes helps correctly match imported Amazon listings to your Magento products.

The initial listing import initiates when completing your store's setup during onboarding. After setup is complete and based on your cron settings, Magento continually checks for newly added Amazon listings (not created in Amazon Sales Channel) and updates your catalog according to these settings.

These settings are part of your store's **Listing Settings**. Update these configurations during onboarding through the **Listing Settings** step.

### To configure Third Party Listings settings:

1. Expand the **Third Party Listings** section.
2. For **Import Third Party Listings** (required), select an option in the drop down:
  - **Import Listing:** Select this option if you want products and information from your Amazon listings to import into your Magento catalog of products. This is the recommended and the default setting.
  - **Do Not Import Listing:** Select this option if you want to manually **create and assign new products** to your Magento catalog for your Amazon listings.

The following options fields are only active when you select to "Import Listing."

3. For **Attribute That Contains Amazon Seller SKU**, select the Magento attribute that matches to the Amazon Seller SKU value.
4. For **Attribute That Contains Amazon ASIN**, select the Magento attribute that you created and match it to the Amazon ASIN.

If you did not create these Magento attributes for your Amazon listings, see **Creating Attributes for Amazon Matching** for information.

When complete, continue to the **Listing Price** section.

**Third Party Listings**

Control whether to import existing listings contained within the Amazon marketplace

Import Third Party Listings \*  ?

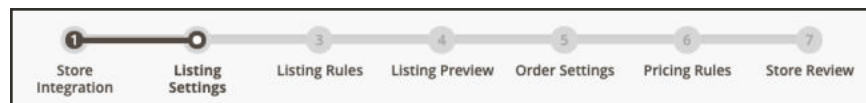
Attribute That Contains Amazon Seller SKU  ?

Attribute That Contains Amazon ASIN  ?

*Third Party Listings*

## Onboarding: Listing Price

### Step 2 Options for Listing Settings



If you are managing a store that is in "Active" or "Inactive" status, see [Listing Price](#).

The Listing Price setting defines which Magento pricing attribute to use as your price source, which is the base (default) price value for your Amazon listings. These defined settings will be used by your [pricing rules](#) to automatically adjust your Amazon listing price relative to the selected Magento Price Source.

You can configure your [pricing scope](#) as global or website. If your pricing scope is set to global, this means that there is a single price source for all your stores/websites. If your pricing scope is set to website, the price source will use fallback logic of website price (if available) followed by the default (global) price.

If your listing rules have more than one website selected in its settings, the order with which website price is used is determined by the website priority configured in your [listing rules](#). This allows you to define product pricing across your catalog. To see if you are using website price scope, see [Catalog Price Scope](#).

The options listed in Magento Price Source, Minimum Advertised Price (Map), and Strike Through Price (MSRP) include your configured Pricing attributes. Pricing attributes are Magento product attributes with the Catalog Input Type for Store Owner value set to Price. See [Attribute Input Types](#).

### To configure Listing Price settings:

1. Expand the **Listing Price** section.
2. For **Magento Price Source** (required), select a pricing attribute in the drop-down (default is "Price").



The option selected in this field determines the price source used for your Amazon listings. If you create pricing rules, the rules are applied to the value defined for the attribute selected here. You may select any configured pricing attribute, however, if the selected attribute is not filled in for a product, the price source for the product will default back to "Price" when pricing rules are applied to determine the published Amazon listing price.

3. For **Minimum Advertised Price (MAP)**, select a pricing attribute in the drop-down (default is no selection).

This field enables a minimum advertised price (MAP) for a product. When you define a pricing attribute and your listing price for a product falls below your determined minimum price (based on your pricing source and rules), this value becomes the MAP for the listing. This allows you to implement pricing rules while still controlling your minimum price for a product. To prevent a listing price from being too low, select a pricing attribute to use as your MAP. However, if the selected pricing field is not defined for a product, the MAP will not be used.

4. For **Strike Through Price (MSRP)**, select a pricing attribute in the drop down (default is no selection).

This field determines which pricing attribute is used as the manufacturer's suggested retail price (MSRP) for a product. If your listing price is less than the defined MSRP, your Amazon listing will display a strike-through of the MSRP price and display the lower listing price, along with the calculated "You Save" amount and percentage. However, if the selected pricing field is not defined for a product, the MSRP feature will not be calculated.

**Important:** This will only apply to listings that have won the **Buy Box** position. The Buy Box is awarded by Amazon to the seller who has the product listed usually at the best price, along with other factors such as FBA/Prime shipping offered, availability, and the seller's performance.

5. For **Apply Value Added Tax (VAT)** field, select an option (default is "Disabled").
  - **Disabled:** Select this option if you do not want to apply VAT to your listing price.
  - **Enabled:** Select this option if you want to apply VAT to your listing price. VAT is typically used as a sales tax in European countries and is added to your final listed price within Amazon. VAT does not apply to final price for listings that are used within an intelligent pricing rule, unless the price floor is hit.
6. For **VAT Percentage**, enter the value for your VAT rate (default is "0.00").

The value entered in this field will be used to calculate the VAT amount to be added to the listing price. If 10.2 is entered, a 10.20% VAT will be applied to your listing price. This field is disabled when the Apply Value Added Tax (VAT) field is set to "Disabled."

7. For **Currency Conversion**, select an option (default is "Disabled").

The options in this drop-down are dependent on your **Magento currency** settings. If options are not available, you may need to set up your currency settings.

8. When complete, continue to the **(B2B) Business Price** section.

### Listing Price

Control aspects of pricing across the Amazon marketplace

Magento Price Source *	Special Price	?
Minimum Advertised Price (MAP)	Price	?
Strike Through Price (MSRP)	Manufacturer's Suggested Retail Price	?
Apply Value Added Tax (VAT)	Enabled	?
VAT Percentage	10.000	?
Currency Conversion	Enabled	?
The current default currencies are as follows: Magento = USD, Amazon = USD.		
Currency Conversion Rate	USD to CAD: 1.25	

*Listing Price*

## Onboarding: (B2B) Business Price

### Step 2 Options for Listing Settings



If you are managing a store that is in "Active" or "Inactive" status, see [\(B2B\) Business Price](#).

Amazon Business is a marketplace exclusively open for Amazon registered business accounts, and only available in the United States, France, Germany, and the United Kingdom in 2019. If the marketplace allows B2B business pricing, it will be editable within your listing settings.

B2B Business Pricing allows merchants with business accounts to purchase from each other with the expected performance of the Amazon shopping experience. With B2B business pricing, businesses can offer tiered pricing based on the quantity purchased.

For your products to be listed on the Amazon Business (B2B) site, you must first enable business in your Amazon Seller Central account. For more information on the B2B feature, see [Amazon: B2B Central](#).

These settings are part of your store's **Listing Settings**. Update these configurations during onboarding through the [Listing Settings](#) step.

### To configure (B2B) Business Price settings:

1. Expand the **(B2B) Business Price** section.
2. For **Enable Business Pricing**, select an option (default is "Disabled").

- **Disabled:** Select this option if you do not want to enable business to business sales. All other fields in this section are disabled when this option is selected.
  - **Enabled:** Select this option if you want to enable your business to business sales. When enabled, the business price is set equal to the list price after all pricing rules have been applied. The business price follows the website pricing scope, if enabled. A business price can not be less than \$1.
3. For **Enable Tiered Pricing**, select an option (default is "Disabled").
- **Disabled:** Select this option if you want the same listing price for all order quantities. All Pricing Level fields in this section are disabled when this option is selected.
  - **Enabled:** Select this option if you want to enable pricing that adjusts based on order quantity. When enabled, the Pricing Level quantity and discount fields enable.
4. Complete the **Pricing Level** settings.
- You can define up to five quantity/discount settings that set the tier pricing for your business listings. In each row, enter the quantity threshold value and the discount percent to apply. For example, if you enter 5 in the first field of the first row and 5 in the second field, when another business purchases a quantity of 5 or more, the price will apply a 5% discount.
5. When complete, continue to the **Stock / Quantity** section.

**(B2B) Business Price**

Control aspects of business (B2B) pricing across the Amazon marketplace

**Enable Business Pricing**  ▾  
Enabling will make listings active in the Amazon business market to include optional tiered pricing.

**Enable Tiered Pricing \***  ▴  
Enabling allows the creation of tiered pricing based on quantity purchased.

<b>Pricing Level One (qty/discount)</b>	<input type="text" value="at least qty"/>	<input type="text" value="% off list price"/>
<b>Pricing Level Two (qty / discount)</b>	<input type="text" value="at least qty"/>	<input type="text" value="% off list price"/>
<b>Pricing Level Three (qty / discount)</b>	<input type="text" value="at least qty"/>	<input type="text" value="% off list price"/>
<b>Pricing Level Four (qty / discount)</b>	<input type="text" value="at least qty"/>	<input type="text" value="% off list price"/>
<b>Pricing Level Five (qty / discount)</b>	<input type="text" value="at least qty"/>	<input type="text" value="% off list price"/>

*(B2B) Business Price*

## Onboarding: Stock/Quantity

## Step 2 Options for Listing Settings



If you are managing a store that is in "Active" or "Inactive" status, see [Stock/Quantity](#).

The Stock/Quantity settings are used to sync the product quantity details from your Magento storefront to the quantity on your Amazon Seller Central account. This tool is very powerful and can be leveraged for additional advertising by displaying urgency to the buyer while keeping your inventory organized. For example, some merchants may have 150 items of a particular SKU in stock in their warehouse, and want to make sure that Amazon shoppers can purchase all of their inventory. Other merchants may wish to only list one item at a time to create a sense of scarcity to the end user. To do this, you would set the Maximum Listed Quantity to 1.

Quantity is a regional attribute, and based on the Amazon Marketplace option selected during [store integration](#). When a change is made to a product's quantity, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration). Your first Amazon store that is set up (with the oldest creation date) controls priority in the quantity settings.

These settings are part of your store's **Listing Settings**. Update these configurations during onboarding through the [Listing Settings](#) step.

For Magento 2.3.x users, Amazon Sales Channel supports the use of the Multi Source Inventory (MSI) extension without any additional setup. See [Managing Inventory](#).

### To configure Stock / Quantity settings:

1. Expand the **Stock / Quantity** section.
2. For **Out-of-Stock Threshold** (required), enter a numerical value for the lowest quantity of a product in order to keep the product eligible for its Amazon listing (default is "0").

This means that if your Magento product stock goes lower than this number, the respective Amazon listing will be ineligible for sales through Amazon.

3. For **Maximum Listed Quantity** (required), enter a numerical value for the quantity you wish to display in your Amazon listing.

This will list all your eligible Amazon listings at the entered value. As soon as an item is sold, the Amazon listing will continue to display this quantity. The displayed listing quantity available will always use this value, even when your actual product quantity is higher or lower. This setting is typically used when you do not manage product inventory.

For example, you may have a product with a quantity of 80 in your Magento catalog. With this Maximum Listed Quantity set to "10," the Amazon listing will always display a quantity available of 10 and will refresh each time a sale is made for the product.

4. For **"Do Not Manage Stock" Quantity** (required), enter a value for your display quantity for your Amazon listings.

Amazon requires that you publish an available quantity. For Magento products that are set to not manage stock but you want to list them on Amazon, the listing will be published with available quantity of the value entered here.

5. When complete, continue to the **Fulfilled By** section.

**Stock / Quantity**

Control aspects of stock management across the Amazon marketplace

Out-of-Stock Threshold \*  ?

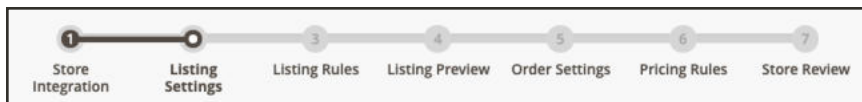
Maximum Listed Quantity \*  ?

"Do Not Manage Stock" Quantity \*  ?

*Stock/Quantity*

## Onboarding: Fulfilled By

### Step 2 Options for Listing Settings



If you are managing a store that is in "Active" or "Inactive" status, see **Fulfilled By**.

"Fulfilled by" settings define who fulfills (or ships) orders. If all of your orders are fulfilled using one method, select between merchant (you) or Amazon. If you plan on fulfilling orders from your locations and using Amazon, we recommend using the third option and configuring a Magento product attribute.

- **Fulfilled by Merchant:** Select this option when you, the merchant, will fulfill all orders. When an order is placed, inventory will be deducted from your Magento catalog.
- **Fulfilled by Amazon:** Select this option if Amazon will fulfill all orders. When selected, product inventory is not deducted from your Magento catalog when an order is placed. Inventory stock for Amazon fulfilled orders is stored and deducted from their warehouses. Before assigning this option, you must verify in your Amazon Seller Central account that your products are eligible for FBA fulfillment. FBA inventory is directly managed through

your Amazon Seller Central Account. With this fulfillment method, Amazon Sales Channel does not share quantity updates between Magento and Amazon. Therefore, not all of the marketing tools described in the Quantity Settings will be available to you in Amazon Sales Channel.

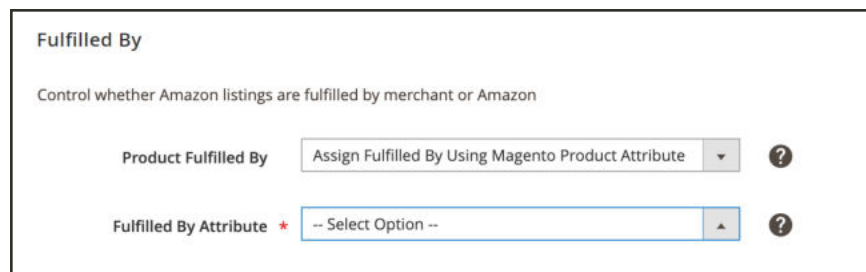
- **Assign Fulfilled By Using Magento Product Attribute:** If your products may be fulfilled by you and Amazon, you may want to create a Magento product attribute with values for Fulfilled By Merchant and Fulfilled by Amazon. Setting this value per product indicates who fulfills the orders.

The fulfillment method is a regional attribute, and based on the Amazon Marketplace option selected during [store integration](#). When a change is made, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration).

These settings are part of your store's **Listing Settings**. Update these configurations during onboarding through the [Listing Settings](#) step.

### To configure Stock / Quantity settings:

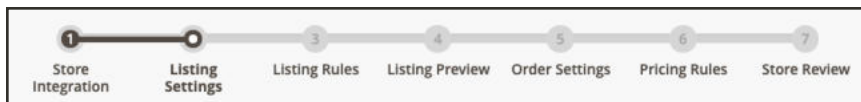
1. Expand **Fulfilled By**.
2. For the **Product Fulfilled By**, select who fulfills (ships) the order:
  - Fulfilled by Merchant: Merchant fulfills order.
  - Fulfilled by Amazon: Amazon warehouse fulfills order.
  - Assign Fulfilled By Using Magento Product Attribute: A Magento attribute indicates who fulfills the order per product. If selected, then select the Magento attribute for **Fulfilled by Attribute**.
3. When complete, continue to the [Catalog Search](#) section.



*Fulfilled By*

## Onboarding: Catalog Search

**Step 2 Options** for [Listing Settings](#)



If you are managing a store that is in "Active" or "Inactive" status, see [Catalog Search](#).

Catalog Search settings enable you to set matching search parameters that help to map eligible Magento products with Amazon listings. Once mapped, Amazon activates actions related to pricing, quantity, overrides, and order and product synchronization.

Defining these values increases the potential for exact matches, minimizing the need to manually match product listings later. Adding the attributes as part of your onboarding [Pre-Setup Tasks](#), Amazon Sales Channel has a higher potential for automatically matching your products during onboarding and syncs product data between Amazon and Magento after onboarding.

If you only create the Amazon ASIN attribute (without adding ASIN values per product), your Magento products may not automatically your Amazon listings will automatically. You can manually match your products through Store Review. However, manual matching does not create the data elements needed to share and sync your product data.

**Important:** If you manually matched a product and you need to update an ASIN, UPC, or other data element for the product, you would have to update the data in both places, in your Magento catalog and in your Amazon listing in your Amazon Seller Central account.

If you want to add attributes at this stage of onboarding, see [Create Product Attributes for Amazon Matching](#).

These settings are part of your store's **Listing Settings**. Update these configurations during onboarding through the [Listing Settings](#) step.

### To configure Search Catalog settings:

We recommend mapping these attributes and values if available. Completing this mapping is not required, but is beneficial for initial product matching and required for proper catalog syncing between Amazon and Magento.

1. Expand the **Catalog Search** section.
2. In the **ASIN** field, select the product attribute you created for the Amazon ASIN value.

An ASIN (Amazon Standard Identification Numbers) is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.

3. In the **EAN** field, select the product attribute you created for the Amazon EAN value.

The European Article Number (EAN) is a barcode standard, a 12 or 13-digit product identification code. Each EAN uniquely identifies the product, manufacturer, and its attributes; typically, the EAN is printed on a product label or packaging as a bar code. Amazon requires EAN codes to improve quality of search results and the quality of the catalog. You can obtain EANs from the manufacturer.

4. In the **GCID** field, select the product attribute you created for the Amazon GCIN value.

The Global Catalog Identifier (GCID) is an ID for products that do not have a UPC code or ISBN. Amazon's Brand Registry allows you to register as a brand owner and create a unique ID for products.

5. In the **ISBN** field, select the product attribute you created for the Amazon ISBN value.

The International Standard Book Number (ISBN) is a unique commercial book identifier barcode. Each ISBN code uniquely identifies a book. ISBN have either 10 or 13 digits. All ISBN assigned after Jan 1, 2007 have 13 digits.

6. In the **UPC** field, select the product attribute you created for the Amazon UPC value.

The Universal Product Code (UPC) is a 12-digit bar code used extensively for retail packaging in United States.

7. In the **General Search** field, select the product attribute you want to use for a general search match.

This is an attribute that you can select to match Magento products to the appropriate Amazon listing. General search uses keyword searches from your catalog. As such, it is recommended to use a Magento attribute that carries relevant keywords, such as the product SKU or product name. General search may return many possible matches, and in such cases, you can select the appropriate Amazon listing from the possible matches. A common selection for this field is "Product Name."

8. When complete, continue to the **Product Listing Condition** section.

**Catalog Search**

Provide data sources for attempting to match catalog products to their respective Amazon listing

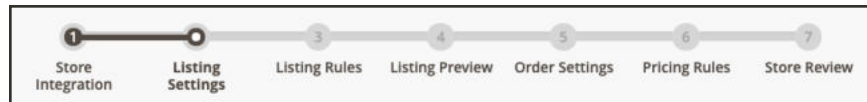
ASIN	<input type="text" value="Amazon ASIN"/>	▼	?
EAN	<input type="text" value="-- Select Option --"/>	▼	?
GCID	<input type="text" value="-- Select Option --"/>	▼	?
ISBN	<input type="text" value="-- Select Option --"/>	▼	?
UPC	<input type="text" value="-- Select Option --"/>	▼	?
General Search	<input type="text" value="Product Name"/>	▼	?

*Catalog Search*



## Onboarding: Product Listing Condition

### Step 2 Options for Listing Settings



If you are managing a store that is in "Active" or "Inactive" status, see [Product Listing Condition](#).

Amazon requires a product listing to have a defined condition. If all your products are new, you can select one of the Amazon condition options in the drop down list to represent all of your products as your global condition value. Standard Amazon conditions include:

- New
- Refurbished
- Used; Like New
- Used; Very Good
- Used; Good
- Used; Acceptable
- Collectible; Like New
- Collectible; Very Good
- Collectible; Good
- Collectible; Acceptable

However, if your catalog contains products in different conditions (New, Used, Refurbished, etc.), you must select the **Assign Condition Using Product Attribute** option. This setting allows you to map your Magento condition attribute and values to your Amazon listing's conditions.

During [Pre-Setup Tasks](#), it was recommended that you create a Magento product attribute for a product's condition. If you offer products in various conditions and you have not created a condition attribute, see [Onboarding: Create a product attribute in Magento](#). Once the condition attribute is created, you can assign a condition value to each of your products in your Magento catalog.

These settings are part of your store's **Listing Settings**. Update these configurations during onboarding through the [Listing Settings](#) step.

### To configure Product Listing Condition settings:

1. Expand the **Product Listing Condition** section.
2. For **Listing Product Condition**, select an option.













- **Standard Amazon condition value:** Select one of the standard Amazon conditions to use as your global condition value for all of your Magento products.
  - **Assign Condition Using Product Attribute:** Select this option if your Magento catalog contains products in various conditions. When this option is selected, the **Condition Attribute** field enables and is required.
3. For **Condition Attribute**, select the Magento attribute to map values to each Amazon condition attribute. You may have **created the attribute** during pre-setup tasks. When selected, a field for each of the standard Amazon conditions displays. Map Magento attribute values to each Amazon condition.
- If your products fall into only one condition, you can map to that single Amazon condition, leaving the others blank.
  - If you have products that fall in the Used or Collectible category but you do not distinguish further, you can map to a single Used or Collectible Amazon category and leave the other similar options blank. All your Used or Collectible conditions will map to the single Amazon Used or Collectible category by default.
  - You can also enter additional text to describe your conditions.

For example, you have a single Used condition for your products. When mapping, you will choose whether you want to map to the Amazon condition Used; Like New: Used, Very Good: Used; Good: or Used; Acceptable. Only complete the field for the Amazon condition option you want, leaving the other Used options set to "--Select Option--." You'll see in the screen shot example, all of your Magento products in Used condition map to the Amazon Used; Very Good condition.

This section is the final section of the **Listing Settings** step.

### Product Listing Condition

Control what condition to list your products

Listing Product Condition	<input type="text" value="Assign Condition Using Product Attribute"/>	
Condition Attribute *	<input type="text" value="Amazon Condition"/>	
New Condition	<input type="text" value="New"/>	
Refurbished Condition	<input type="text" value="Refurbished"/>	
	<input type="text" value="Optional text to describe refurbished condition (1,000 characters maximum)."/>	
Used; Like New Condition	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe used; like new condition (1,000 characters maximum)."/>	
Used; Very Good Condition	<input type="text" value="Used"/>	
	<input type="text" value="Optional text to describe used; very good condition (1,000 characters maximum)."/>	
Used; Good Condition	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe your used; good condition (1,000 characters maximum)."/>	
Used; Acceptable Condition	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe used; acceptable condition (1,000 characters maximum)."/>	
Collectible; Like New Condition	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe collectible; like new condition (1,000 characters maximum)."/>	
Collectible; Very Good Condition	<input type="text" value="Collectible"/>	
	<input type="text" value="Optional text to describe collectible; very good condition (1,000 characters maximum)."/>	
Collectible; Good Condition	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe collectible; good condition (1,000 characters maximum)."/>	
Collectible; Acceptable Condition	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe collectible; acceptable condition."/>	

*Product Listing Condition*

› [Continue to Step 3 of Onboarding](#)

## Onboarding: Listing Rules

**Step 3 of 7** for [Onboarding Amazon Sales Channel](#)



If you are managing a store that is in "Active" or "Inactive" status, see [Listing Rules](#).

Listing Rules define the rules to determine which products Amazon Sales Channel will publish to your Amazon Marketplace. These rules provide many options to create simple to complex rules to include or exclude products as listings. Each rule consists of conditions that set the requirements for product listing eligibility.

Your listing rules are continually synchronized with your Magento catalog. When you add new Magento products that meet eligibility requirements set by your listing rules, the products will automatically process for listing on Amazon.

- If you want all of your products to be published to an Amazon listing, do not define any conditions for your listing rules.
- If you want to limit which of your catalog products that will be published to an Amazon listing, you will define your listing rule conditions in this step of onboarding. Defining the conditions for your Amazon listing rules follow the same logic and process as defining the conditions for [Cart Price Rules](#) in Magento.
- If your listing rules exclude a product, the eligibility status for that product changes to Ineligible. Ineligible products will not be published to Amazon.
- If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. Amazon listings can be manually removed when [managing listings](#).

Changes to quantity and eligibility status impact all listings that share the Amazon Seller SKU in marketplaces which exist for stores selling in the same region (as defined in the Amazon Marketplace field during [Store Integration](#)) will also be impacted. However, a change to a shared Amazon Seller SKU in one region will not affect the product's Amazon listings in a different region (as defined during Store Integration).

During onboarding, your listing rules will be applied to your catalog products. You can review ineligible listings on the Ineligible tab in the [Store Review](#) step.

### To configure Listing Rules settings:

1. Tap **Listing Rules**.
2. For **Website**, select an option.

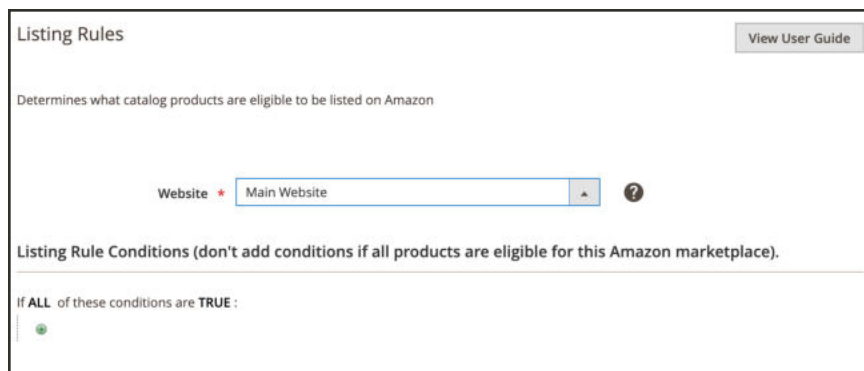
The options in this drop-down are dependent on the **websites** you have set up in your Magento configuration. Select the website to represent which website to have eligible products listed on Amazon. Only one website can be selected, as each website requires a unique Amazon store created in Amazon Sales Channel.

3. Define your desired conditions for the eligibility of products to be listed on Amazon.

See **Example: Define a Condition**.

**Important!** When you continue to **Listing Preview** (step 4), the option you selected in the Website field locks for this integration. To change the website after continuing to step 4, you must exit this **store integration** and begin a new one.

See **Listing Rules**.



*Listing Rules*

> **Continue to Step 4 of Onboarding**

## Onboarding: Listing Preview

**Step 4 of 7** for **Onboarding Amazon Sales Channel**



**Important!** Once you continue to the **Listing Preview** (step 4), you cannot change the website selected in your listing rules (step 3) for this integration. To change the website after leaving step 3, you must exit this **store integration** and begin a new one.

At this step of onboarding, you have created your listing rules that determine which of your Magento catalog products are eligible to be listed on Amazon.

Your current Amazon listings are compared against your rules, based on the conditions you defined. You can then review which products will move to an ineligible status based on your

current Amazon Seller Central account, which products will move from an ineligible state back to an eligible state, and which products will be New Amazon Listings and added to your Amazon listing from your eligible Magento catalog.

Listing Preview allows you to preview your potential Amazon listings and make any necessary adjustments to your listing rules. If you need to adjust your listing rules, click **Listing Rules** in the progress bar to return to the [listing rules](#) step.

Your potential Amazon listings will populate on the Listing Preview screen in one of three tabs:

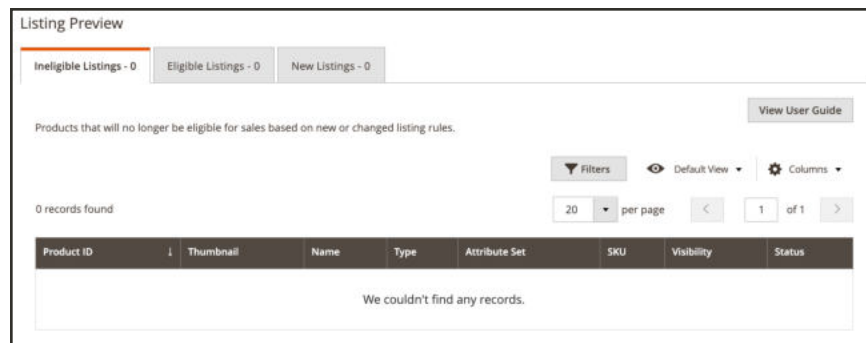
- **Ineligible Listings:** Products listed on this tab are not eligible for Amazon listing based on your current listing rule settings.

Ineligible products will not be published to Amazon. If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. To manually remove a listing, see [Ending an Amazon Listing](#).

Products that are not eligible by Amazon requirements are not listed here. Those products are listed on the [Inactive Listings tab](#).

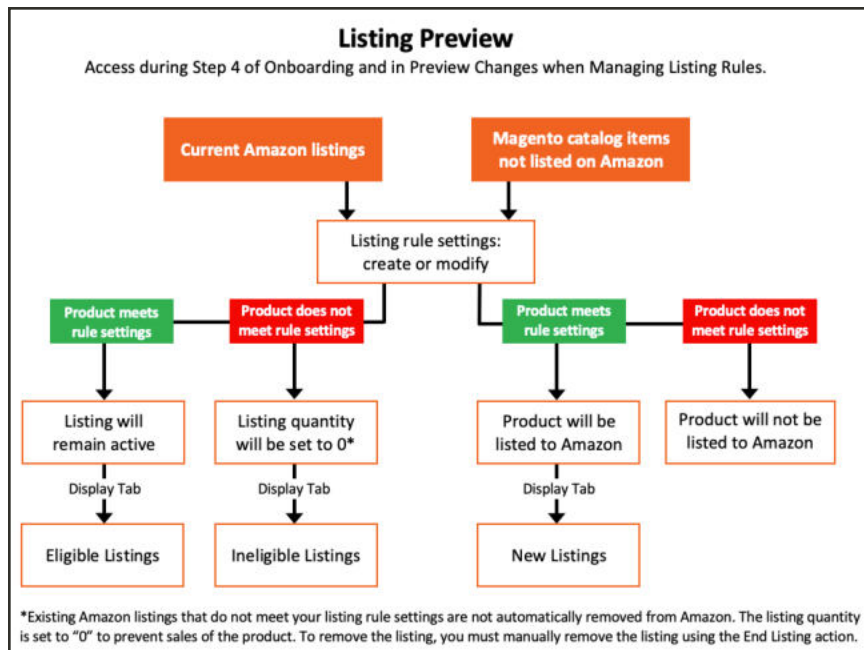
- **Eligible Listings:** Products listed on this tab are eligible for Amazon listing based on your current listing rule setup and are eligible by Amazon requirements. This tab includes your existing Amazon listings that will import (if you have the **Import Third Party Listings** field set to "Import Listing" in the Listing Settings step).
- **New Listings:** Products listed on this tab include your Magento catalog products that are newly eligible for Amazon listing based on your current listing rule setup and will create new Amazon listings.

See [Listing Preview](#) for column descriptions.



*Listing Preview*

## Listing Preview Workflow



Listing Preview Workflow

> [Continue to Step 5](#)

## Onboarding: Order Settings

**Step 5 of 7** for [Onboarding Amazon Sales Channel](#)



If you are managing a store that is in "Active" or "Inactive" status, see [Order Settings](#).

Order Settings define how Amazon orders are imported into and processed in Magento.

Beginning when you integrate Amazon Sales Channel with your Amazon Seller Central account during onboarding, Amazon orders import and create new orders in Amazon Sales Channel. Amazon orders are imported and create new orders when the Amazon sets the order status to "Unshipped." Orders that existed in Amazon in any status other than "Unshipped" prior to your store's integration will not import.

When an order is created on Amazon, it is not immediately imported into Amazon Sales Channel. Amazon assigns a "Pending" status to newly created orders. Once Amazon verifies the order and payment method, Amazon changes the order's status to "Unshipped." This status change triggers Amazon Sales Channel to import the order and create a corresponding order. Amazon Sales Channel creates a matching order that corresponds to the Amazon order. Orders created in Amazon Sales Channel display and can be managed in the [Orders](#) tab in Amazon Sales Channel Home.

## To configure Order Settings:

1. Tap **Order Settings** in the onboarding progress bar.
2. For **Import Amazon Orders** (required), choose an option in the drop-down:
  - **Disabled:** Select this option if you do not want to create corresponding orders in Magento when new orders are received from Amazon. When this option is selected, all other fields on this screen are disabled.
  - **Enabled:** Select this option if you want to create corresponding Magento orders when new orders are received from Amazon. Magento orders are created based on Amazon status and stock levels.

"Enabled" must be selected to manage Amazon orders in Amazon Sales Channel. When "Disabled" is selected, your Amazon orders will display in the Orders tab but will not have a corresponding Magento order number and cannot be managed in Amazon Sales Channel. Information for these orders is for review only. You must manage these orders in your Amazon Seller Central account.

3. For **Import Amazon Orders Into Magento Store** (required), select which Magento Store the Amazon orders will be associated with when they are created in the Magento Order grid. The list of options in this drop-down is dependent on the Magento stores you have set up in your configuration. See [Stores](#).
4. For **Customer Creation**, select an option in the drop-down. Options:
  - **No Customer Creation (guest):** Select this option if you do not want to create a customer account in Magento using the imported customer data from the Amazon order. When selected, this option tells Magento to process an imported Amazon order the same way it processes a guest checkout in Magento.
  - **Build New Customer Account:** Select this option if you want to create a New Customer Account in Magento using the customer data imported with the Amazon order. Selecting this option builds your customer database from your Amazon orders.
5. For **Order Number Source**, select an option in the drop-down. Options:
  - **Build Using Magento Order Number:** Select this option if you want to create a unique Magento order number for the corresponding Amazon order using the Magento incrementally-assigned order ID.
  - **Build Using Amazon Order Number:** Select this option if you want to create the Magento order number using the corresponding Amazon-assigned order number.

Once an order is imported, the Amazon Order Number and the Magento Order Number display in the [Orders tab](#).

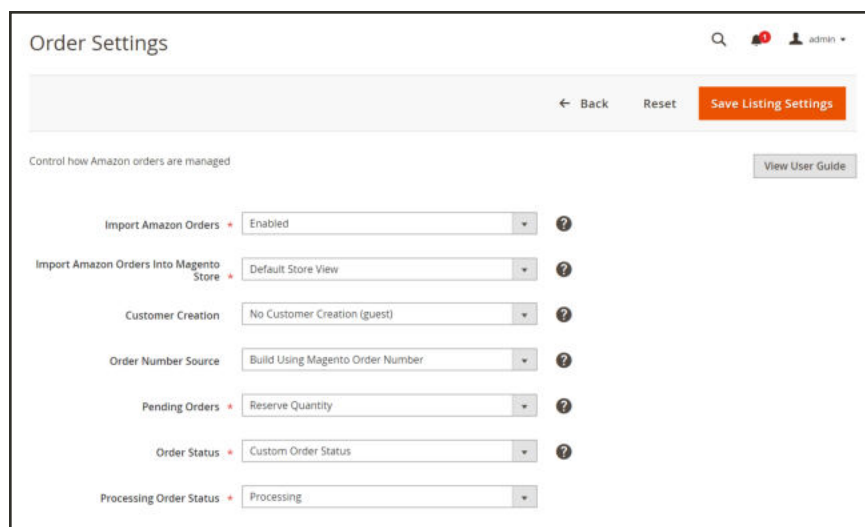
6. For **Pending Orders** (required), select an option in the drop-down. Options:



- **Do Not Reserve Quantity:** Select this option when you do not want your Magento stock quantity affected by your Amazon orders. Select this option if you use Amazon for your fulfillment process (FBA). When this option is selected and you receive an Amazon order, the quantity ordered will not affect your Magento stock quantity.
- **Reserve Quantity:** Select this option when you want the order quantity in the Amazon order to be "reserved" in your Magento stock quantity. When this option is selected and you receive an Amazon order, the quantity ordered will "reserve" in your Magento stock quantity to prevent your Magento stock from "over selling."

Remember, Amazon orders do not import into and create new orders in Magento until Amazon verifies the order and payment method changes the order status to "Unshipped."

7. For **Order Status** (required), select an option from the drop-down. Options:
- **Default Order Status:** Select this option when you want newly created orders imported from Amazon to be assigned your defined default order status for new orders. The default status for new orders (unless you have created a custom order status for new orders) is "Pending." See [Processing Orders](#).
  - **Custom Order Status:** Select this option when you want newly created orders imported from Amazon to be assigned a status other than the default. When this option is selected, the Processing Order Status field enables for you to select the status you want to use for newly created orders imported from Amazon.
  - **Processing Order Status:** Select an option in the drop-down. The options that display in this field are based on the default status options in Magento. See [Order Status](#). You can also create a custom order status to display here for selection. To create a custom order status, see [Custom Order Status](#).



Order Settings

› **Continue to Step 6 of Onboarding**

For information on Magento order creation based on Amazon and inventory status, see [Order Settings](#).

## Onboarding: Pricing Rules

### Step 6 of 7 for Onboarding Amazon Sales Channel



If you are managing a store that is in "Active" or "Inactive" status, see [Pricing Rules](#).

Price rules are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the price rules for a store during setup in the [Amazon Stores](#) tab in Amazon Sales Channel Home. Tap the store's name in the store list to display the store's onboarding progress. Tap **Pricing Rules** in the progress bar.

There are two types of pricing rules:

- [Standard Pricing Rule](#)
- [Intelligent Repricing Rule](#)

You can add pricing rules for your Amazon listings. Price rules can be used to automatically adjust your listing prices, based on a set of defined conditions. Price rules are triggered and calculate your adjusted price before your product is listed on Amazon.

The price source for your Amazon listings is defined in the **Magento Price Source** field in your [Listing Price](#) settings. Any adjustment calculations defined in the pricing rule use price source as the starting value.

Amazon Sales Channel gives you the ability to set pricing rules, these pricing rules allow you to set your Amazon Listing price different than your Price Source. Additionally, you can stack multiple rules that will work together to adjust your price.

A pricing/repricing rule requires three sets of information during its setup:

- **Pricing Rule General Settings:** Defines the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.
- **Pricing Rule Conditions:** Determine which products will be eligible for the price rule.
- **Pricing Rule Actions:** Define the adjustment calculations that will be applied to the price source to determine the listing price.

You can create [standard pricing rules](#) that will automatically adjust your Amazon listing price relative to the selected Magento Price Source. This feature allows you to manipulate your Amazon prices in a way that is very similar to Magento's [Catalog Price Rules](#). You can create

complex rules that automatically change prices for specific products, products inside of specific categories, or products with specific attributes. You can complete traditional settings and reprice your products to increase or decrease based on a fixed amount or a percentage.

Another powerful tool is the **Intelligent Repricing** feature that will adjust your Amazon listing price based on competitor **Buy Box Price** or **Lowest Competitor Price**. Similar to Magento's **Catalog Price Rules**, this advanced feature allows you to manipulate your Amazon prices by creating complex rules that allow you to define the scope for a price change for specific products, products inside of specific categories, or even with specific product attributes.

Using intelligent repricing you can adjust your products listing prices on Amazon, based on competitor's pricing. Amazon Sales Channel has built in safeguards for you to set to protect margins or avoid matching the prices of a merchant with low feedback. Using intelligent repricing rules, Amazon listing prices can be automatically manipulated as a fixed or percentage amount (up or down) or even synchronized to the Buy Box or Lowest Price on a per item basis. Rules can even be stacked to provide unlimited flexibility.

Pricing rules determine if your product is listed on Amazon using your defined Price Source or if the price is automatically adjusted before listing on Amazon, based on defined conditions for the rule.

You can control important aspects of rules, such as active/inactive status, website eligibility, optional date ranges, and optional priority levels (used for rule stacking).

For example, you can define and set the conditions for a price rule that, when the conditions are met, automatically adjust your listing price before it is sent to Amazon.

### To configure your Pricing Rules:

1. On the Pricing Rules screen during onboarding, tap **Add New Pricing Rule**.
2. Complete the **General settings** for the rule.
3. Complete the **Price Rule Conditions** for the rule.
4. Complete the **Price Rule Actions** for the rule.

### Pricing Rule Sections

SECTION	IN THIS SECTION, YOU WILL:
<b>General Settings</b>	Define the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.
<b>Pricing Rule Conditions</b>	Define which of your catalog products are eligible for the pricing rule.
<b>Pricing Rule Actions</b>	Define the adjustments applied to the price source to calculate the listing price.

› Continue to the **Price Rule General Settings** section

## Onboarding: Price Rule General Settings

## Step 6 Options for Pricing Rules



If you are managing a store that is in "Active" or "Inactive" status, see [Price Rule General Settings](#).

Define the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.

### To complete the Price Rule General Settings section:

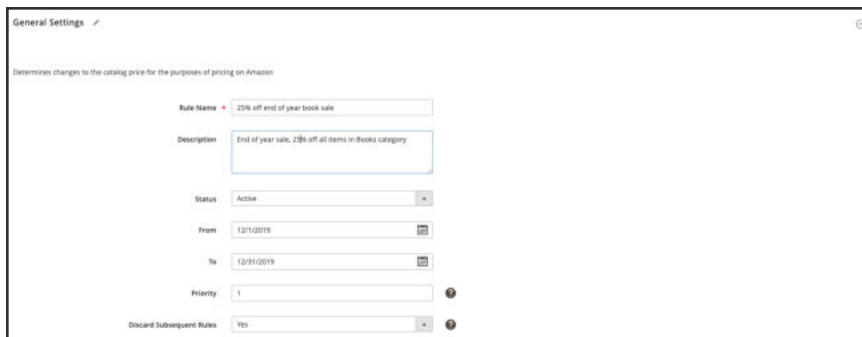
1. For **Rule Name** (required), enter the name for the rule.  
This is for your internal identification purposes only. The more descriptive the rule name, the better.
2. For **Description**, enter a detailed description of your rule.  
This could include information on the products that qualify, the active dates, the formula for calculating your adjusted price, or any other information you'd find useful if you ever needed to modify the rule.
3. For **Status**, select an option:
  - **Active:** Select this option if you want the pricing rule to apply to your eligible products and adjust your listing pricing before publishing to Amazon.
  - **Inactive:** Select this option if you do not want the pricing rule to apply to your eligible products. This option will most likely be used when modifying a pricing rule or turning it off after a limited promotion.
4. For **From** and **To**, enter a beginning and ending date for the pricing rule. You can also tap the calendar icon to select a date from the dynamic calendar. This automatic start and stop option is beneficial when setting up limited-time or seasonal promotions with definite begin and end dates.
5. For **Priority**, enter a numerical value for the rule's priority. Priority value equal to 1 is the highest priority. When you have multiple active pricing rules, you can use priority to determine which rule is applied first. This field is required to use the Discard Subsequent Rules feature.
6. For **Discard Subsequent Rules**, select an option.
  - **Yes:** Select this option if you do not want any other pricing rules that may apply to a product to be applied. Discarding subsequent rules means that, in the event that multiple pricing rules apply to the same product, only the pricing rule with the highest defined priority will be applied to a qualifying product. This prevents multiple pricing rules from stacking and providing unintended additional discounts

- **No:** Select this option if you want to allow multiple pricing rules to apply to the same product. This could result in stacking and providing multiple discounts applied to your listing price.

To discard subsequent rules, a pricing rule must use priorities which are set in the **Priority** field.

When complete, continue to the [Price Rule Conditions](#) section.

See [Pricing Rules General Settings](#).



*Onboarding: Pricing Rule General Settings*

## Onboarding: Price Rule Conditions

### Step 6 Options for Pricing Rules



If you are managing a store that is in "Active" or "Inactive" status, see [Price Rule Conditions](#).

Conditions determine which products will be eligible for the price rule. Defining the conditions for your Amazon pricing rules follow the same logic and process as defining the conditions for [Cart Price Rules](#) in Magento. If your price rule applies to all products in your Magento catalog, then leave this section blank

### Example: To build a price rule condition

This process can be simple or detailed, depending on your catalog setup. You can set up your conditions so that when "ALL" or "ANY" of the define conditions are either "TRUE" or "FALSE" for a product, then the product is eligible for the pricing rule to be applied.

Conditions are based on existing product attribute values. To apply the rule to all products, leave the conditions section blank.

If you want to define a condition based on a specific product attribute, the **Use for Promo Rule Conditions** field for the attribute must be set to "Yes." The field is located on the **Storefront Properties** screen for the attribute.



*Condition - Line 1*

The condition in this example will define a rule that will apply a 25% discount to all products that are defined in the "Books" category.

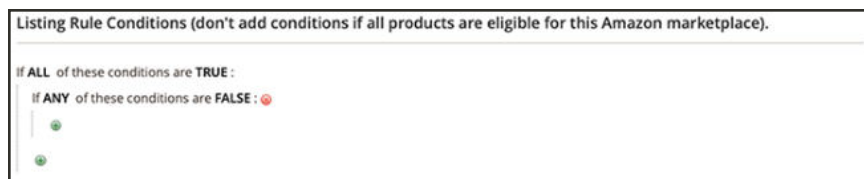
The rule statement has two bold links, which when clicked, display the options for that part of the statement. If you save the condition without making changing a bold option, the rule applies to all your products.

- Click the **ALL** link, and chose either "ALL" or "ANY."
- Click the **TRUE** link, and choose either "TRUE" or "FALSE."
- To apply the rule to all products, leave the condition unchanged.

You can create different conditions by changing the combination of these values. For this example, the following condition is used:

If ALL of these conditions are TRUE:

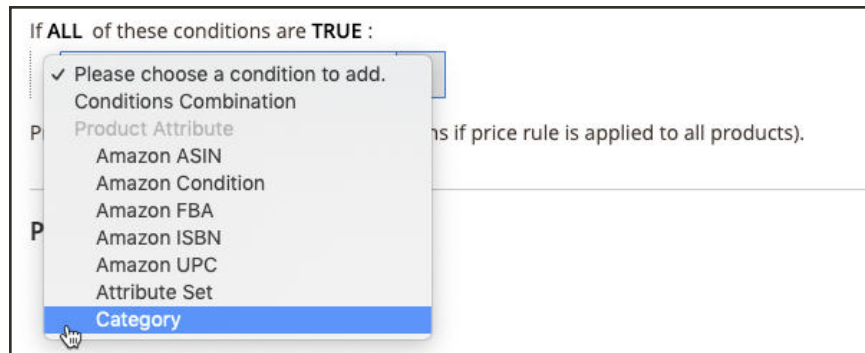
1. Click the **Add** (+) button at the beginning of the condition line to display available attributes on which the condition function. Select an attribute on which to base the condition, such as a conditions combination or a product attribute.
  - **Conditions Combination:** Selecting this option allows you to create an additional set of "All/Any" and "True/False" conditions inside the existing set.



*Conditions Combination*


- **Product Attribute:** The product attributes in this drop down is dependent on the setup of the attribute. For an attribute to display in the list, it must be configured to be used in promo rule conditions. See the Use for Promo Rule Conditions field in **Product Attributes**.



- a. In the list under **Product Attribute**, choose the attribute that you want to use as the basis of the condition. For this example, the selected condition is "Category."



Condition Line 2, Part 2

The selected condition displays in the statement, followed by two more bold links. The options differ depending on the product attribute you select.

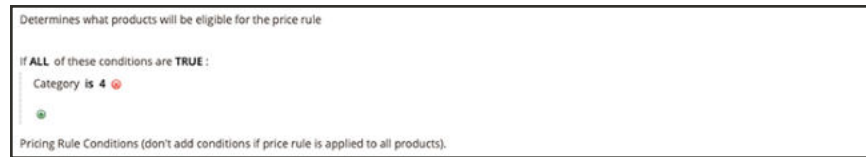
Once you set the attribute, it cannot be changed. To change the attribute, you must delete the line and add the new attribute. You can delete a condition line by clicking the **Delete** (  ) button at the end of the line.

- b. Click the **is** link, and choose the comparison operator that describes the condition for products to meet. For this example, the comparison operator is "is." The available options depend on the attribute selected in the previous step and may include different comparison options such as matching values, not including or including at least one of a value, and greater than, equal to, and less than a numerical amount. In this example, the options are "is" and "is not."
- c. Click the ... "more" link, and choose the attribute value upon which the condition is based. The options displayed depend on the attribute's setup. You may be asked to select an option from a drop-down, or you may need to enter text or numerical values for the condition. For this example, the field displays blank. To select your category(ies) for the rule, click the chooser icon (  ) to display your selection options. This rule is for Books, click the Books checkbox. The category number populates in the field. Click the green checkmark icon (  ) to accept your category selection(s).



Condition Line 2, Part 3

The selected item displays in the statement to complete the condition.



*Condition Line 2, Part 4*

This example condition is complete. As stated, this condition means that any product in your Magento catalog that has a defined category of "Books" (4) is eligible for this pricing rule. You can add more condition lines to further narrow your eligible products.

2. To add another condition line to the statement, return to step 1 and repeat the process until all desired conditions are complete.

You can delete a line of the condition statement at any time by clicking the **Delete** (⊗) button at the end of the line.

When complete with your price conditions, continue to the **Pricing Rule Actions** section.

## Onboarding: Price Rule Actions

### Step 6 Options for Pricing Rules



If you are managing a store that is in "Active" or "Inactive" status, see **Price Rule Actions**.

Price Rule Actions define the adjustment calculations that will be applied to the price source to determine the listing price.

### To complete the Price Rule Actions section for a Standard Price Rule:

1. For **Rule Type**, select "Standard price rule" in the drop-down.
2. For **Price Action**, select an option in the drop-down.
  - **Decrease By:** Select this option if you want the defined price source value to be decreased before listing to Amazon.
  - **Increase By:** Select this option if you want the defined price source value to be increased before listing to Amazon.
3. For **Apply**, select an option:



- **Apply as percentage:** Select this option if you want the defined price source value adjusted by a percentage.
  - **Apply as fixed amount:** Select this option if you want the defined price source value adjusted by a fixed amount.
4. For **Adjustment Amount** (required), enter the numerical value for the price adjustment.
- If you selected "Apply as percentage" in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).
- If you selected "Apply as fixed amount" in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a \$25 fixed adjustment).
5. When complete, tap **Save Pricing Rule**.
- See [Price Rule Actions](#).

*Onboarding: Standard Price Rule Adjustment*

### To complete the Price Rule Actions section for an Intelligent Repricing Rule:

Define the Rule Type in the **Select Price Rule Type** section.

1. For **Rule Type**, select "Intelligent repricing rule" in the drop-down.
2. For **Competitor Price Source**, select an option in the drop-down.
  - **Use "Buy Box" Price:** Select this option when you want to adjust your Amazon pricing based on the Amazon Buy Box seller price. A **Buy Box** price exists when multiple sellers on Amazon offer the same product. Amazon defines the Buy Box seller based on performance requirements. Merchants seek to win the Buy Box seller status and offers maximum visibility of your product listings.
  - **Use Lowest Competitor Price:** Select this option when you want to compare and adjust your listing price to competitor pricing for the same product. When this option is selected, the **Minimum Positive Feedback** and **Minimum Feedback Count** fields enable.
3. If enabled, select an option for **Minimum Positive Feedback**.

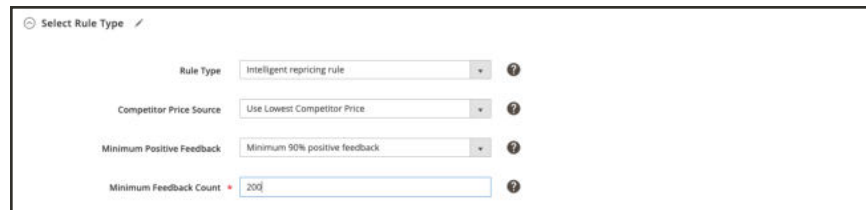
- **All Competitor's Prices:** Select this option when you want to compare and adjust your pricing based on all competitor prices for the same product.
- **Minimum 80/90/95/98% positive feedback:** Select this option when you want to limit the competitors to whom you compare and adjust your pricing for the same product. This will narrow down your competitors further by requiring their listing to have a minimum of the chosen percentage of positive feedback and then use the lowest price of that subset of competitors.

4. If enabled, enter a numerical value for **Minimum Feedback Count**.

This is an optional numerical value that further narrows down the competitive pricing. For example, if a merchant has a 95% positive feedback rating, but only has a feedback count of 20, this might not be a competitor you would want to be included to modify your pricing against. However, if you put a value of 1000, it would require that the merchant have 95% positive feedback and a minimum of 1000 merchant reviews.

You might use these competitor pricing and feedback options to avoid basing your pricing against a competitor who has poor feedback and is selling a lower quality product.

See [Price Rule Actions](#).



*Onboarding: Intelligent Price Rule Type Section*

Define your condition variances in the **Competitor Conditional Variances** section.

1. For **Conditional Variance**, select an option in the drop-down.
  - **Use all competitor's product conditions:** (Default selection) Select this option if you want your product to compare against any available condition (if a match does not exist for the condition you are listing).
  - **Use Only Matching Competitor's Product Condition:** Select this option if you want your product to compare only against competitor's products in the same condition. If no match exists, the product will price at the Price Source.
  - **Apply Variance (if competitor's product condition differs):** Select this option to first try to compare against your matched product condition. If no matching condition exists, a variance (as a percentage) will be applied relative to your product condition and the lowest competitor's condition.

When the Apply Variance feature is selected, additional variance fields display for each of your Amazon conditions. This feature allows you to utilize intelligent repricing rules when you offer products which are in a different condition than your competitors. To understand the calculation behind conditional variance, you will need to first understand that all variance is determined from a base match price.

Conditional variance options only displays when your listing settings for Condition are set to map condition values using a Magento product attribute. For all mapped conditions, you can denote a variance percentage of 1-100. The exception is collectibles, in which case a percentage greater than 100 may be applied.

See [Price Rule Actions](#).

*Onboarding: Intelligent Price Competitor Condition Variance Section*

Define your pricing adjustment in the **Price Adjustment** section.

1. For **Price Action**, select an option:
  - **Decrease By:** Select this option if you want the defined price source value to be decreased before listing to Amazon.
  - **Increase By:** Select this option if you want the defined price source value to be increased before listing to Amazon.
  - **Match Competitor Price:** (Intelligent repricing rule only) Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Adjustment Amount** fields are removed.
2. For **Apply**, select an option:

- **Apply as percentage:** Select this option if you want the defined price source value adjusted by a percentage.
  - **Apply as fixed amount:** Select this option if you want the defined price source value adjusted by a fixed amount.
3. For **Adjustment Amount** (required), enter the numerical value for the price adjustment.

If you selected "Apply as percentage" in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).

If you selected "Apply as fixed amount" in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a \$25 fixed adjustment).

See [Price Rule Actions](#).

*Onboarding: Intelligent Price Adjustment Section*

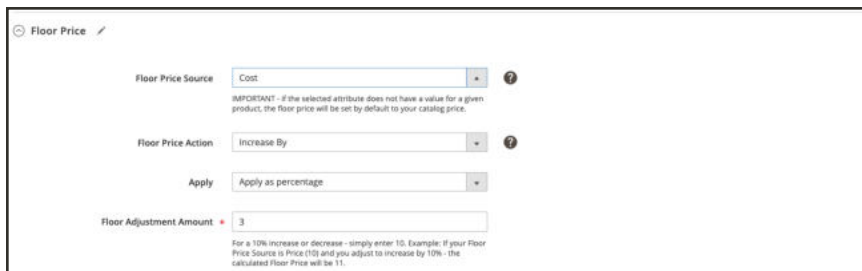
Define your lowest price setting in the **Floor Price** section.

1. For **Floor Price Source**, select an attribute from the drop-down.
 

Select your Magento attribute which will indicate your relative floor limit. For example, if you don't want your product listing price to go below the Cost of your item, you would choose the Cost attribute.
2. For **Floor Price Action**, select an option.
  - **Decrease By:** Select this option if you want the defined floor price source value to be decreased before listing to Amazon.
  - **Increase By:** Select this option if you want the defined floor price source value to be increased before listing to Amazon.
  - **Match:** Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Floor Adjustment Amount** fields are disabled.
3. The **Apply** field defaults to "Apply as percentage."
4. For **Floor Adjustment Price**, enter the numerical value for the percent to adjust your floor price source.

See [Price Rule Actions](#).

In this example, the floor price is set to be 3% above the cost of the item.



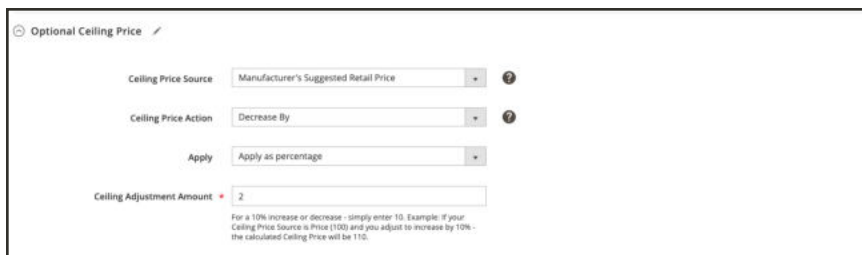
*Onboarding: Intelligent Price Floor Price Section*

Select your optional highest price setting in the **Optional Ceiling Price** section.

1. For **Ceiling Price Source**, select an attribute from the drop-down.  
 Select your Magento attribute which will indicate your relative ceiling limit. For example, if you don't want your product listing price to go above the MSRP of your item, you would choose the Manufacturer's Suggested Retail Price attribute.
2. For **Ceiling Price Action**, select an option.
  - **Decrease By:** Select this option if you want the defined ceiling price source value to be decreased before listing to Amazon.
  - **Increase By:** Select this option if you want the defined ceiling price source value to be increased before listing to Amazon.
  - **Match:** Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Ceiling Adjustment Amount** fields are disabled.
3. The **Apply** field defaults to "Apply as percentage."
4. For **Ceiling Adjustment Price**, enter the numerical value for the percent to adjust your floor price source.

See [Price Rule Actions](#).

In this example, the ceiling price is set to be 2% below the MSRP of the item.



*Onboarding: Intelligent Price Ceiling Price Section*

When complete, tap **Save Pricing Rule**.

> **Continue to Step 7 of Onboarding**

## Onboarding: Store Review

**Step 7 of 7** for [Onboarding Amazon Sales Channel](#)



Store Review is the final step of the onboarding process. At this stage of onboarding, Magento has connected to Amazon, requested your listing information, and compared your Amazon listings to your listing settings, rules, overrides, and conditions. All listings are categorized based on these settings.

### To complete your Store Review and Complete your Setup:

1. See the table below for all listing descriptions and options.
2. Review your listings on their appropriate tabs.
3. Update listing status by modifying your configurations and listing rules. You have a couple methods for updating listings:
  - Use the actions available on each tab for your listings to review and edit your listings.
  - Edit your store's listing settings through previous Onboarding steps.
4. When you are satisfied with your listings, tap **Complete Setup**.

You can edit these settings at any time after completing onboarding setup. Access the store integration through the [Amazon Sales Channel Home](#).

Your Amazon Sales Channel store setup completes, your listing information is published to your Amazon Seller Central account, and the status of the new store changes "Active" on the Amazon Sales Channel Home screen.

In this final step, you need to review each of your listings and modify as needed to ensure your listings are published as you want. Each tab displays based on their status according to your current settings. If you want to update a listing, match it to your Magento catalog, to change its publish status, you can use the available actions on each screen as described below.

When your listings display in the status you wish and you are complete with adjusting your store, listing, and rules settings, you are ready to tap **Complete Setup**. Your store setup will complete, your listings and data will transmit and publish to Amazon. After setup, you can manage your stores, listings, and orders from the [Amazon Sales Channel Home](#) screen.

The different tabs on the Store Review screen allow you to review your Amazon listings before completing your Amazon Sales Channel store setup.

### Store Review Tabs

TAB	DESCRIPTION
Incomplete	Displays your Magento catalog products that meet your defined listing settings but are missing information required by Amazon for a listing.
New Third Party	Displays your existing Amazon listings (based on information received from Amazon) that are not matched to a product in your Magento catalog.
Ready to List	Displays your catalog products that are ready to create new Amazon listings, but your store is not configured to automatically publish new listings. This tab is used to manually publish your new listings.
Inactive	Displays your catalog products that have been published to Amazon, but Amazon has not approved the listing for Active status.
Active	Displays your Amazon listings that have been matched to a product in your Magento catalog, have been published to Amazon, and Amazon has approved for Active status.
Overrides	Displays your Amazon listings that meet the criteria for a defined override and to which the override has been applied. Overrides take priority over any other account setting.
Ineligible	Displays your existing Amazon listings that are no longer eligible, based on your defined listing settings.
Ended	Displays your Amazon listings that have manually been ended (removed) from Amazon.

Each tab differs slightly in the options available in the **Actions** drop-down, the **Select** (Action column) drop-down, and the default and available table columns. The **workspace controls** are the same and allow you to customize displayed data.

The **Actions** drop-down options can apply the selected action to all listings selected (checked), while options in the **Select** drop-down in the **Action** column applies the action only to the individual listing.



Store Review tabs

## Incomplete

Listings that display on this tab include your Magento catalog products that meet your Amazon eligibility requirements as defined in your listing rules but are missing information required by Amazon before listing (example: the Amazon ASIN or a defined product condition).

In the **Actions** drop-down:

- **Re-attempt to auto match to Amazon listings:** Selecting this option initiates the automatic process for matching your Amazon listings data to your Magento catalog. If products are not automatically matching, revisit your [Catalog Search](#) options in your listing settings. If listings don't automatically match after updating your Catalog Search options, you can match products manually in the Update Required Info action.

In the **Select** drop-down in the Actions column:

- **Update Required Info:** Select this option if listings do not automatically match to your catalog. You can manually match catalog products to listings, manually assign an ASIN to a catalog match, or update a missing condition for listing. See [Update Required Info](#).
- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

See [Incomplete Listings](#).

## New Third Party

Listings that display on this tab include your existing Amazon listings that have not been matched to a product in your Magento catalog. To utilize listing management for quantity, pricing, handling time, and more, each of your Amazon listings must be assigned (matched) to a product in your Magento catalog. You have a few options to assign a listing to a product in your Magento catalog.

In the **Actions** drop-down:

- **Create New Catalog Product(s):** Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See [Creating and Assigning Catalog Products](#).
- **Attempt Automatic Match:** Select this option to prompt Amazon Sales Channel will automatically attempt to match the selected listings to your catalog based on your current [Catalog Search](#) options in your Listing Settings. If you modify your Catalog Search options, this action will allow you to attempt the matching process again.

In the **Select** drop-down:

- **Assign Catalog Product:** Select this option to manually match the listing with a product in your Magento catalog. See [Creating and Assigning Catalog Products](#).



- **Create New Catalog Product:** Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See [Creating and Assigning Catalog Products](#).
- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

See [New Third Party Listings](#).

## Ready to List

The Ready to List tab displays your Magento catalog meet your defined listing settings and are ready to publish to Amazon as a **new** listing.

The Ready to List tab only displays when your **Automatic List Action** field in **Product Listing Actions** is set to "Do Not Automatically List Eligible Products." This setting tells Amazon Sales Channel that any new Amazon listings must be published manually. You have a few options to manually publish a new listing to Amazon:

In the **Actions** drop-down:

- **Publish Product to Amazon:** Select this option to publish the catalog product to a new listing on Amazon. See [Publishing a Ready to List listing](#).

In the **Select** drop-down in the Action column:

- **Publish On Amazon:** Select this option to publish the catalog product to a new listing on Amazon. See [Publishing a Ready to List listing](#).

See [Ready to List Listings](#).

## Inactive

Listings that display on this tab include your products that have been published to Amazon but are not active on the Amazon marketplace. Your listings could be inactive for a few different reasons. For example, you might not be eligible to list that particular brand. Inactive listings are dictated by Amazon's listing standards and your Amazon Seller Central account permissions.

In the **Actions** drop-down:

- **End Listing(s) on Amazon:** Select this option to remove all selected listings from the Amazon marketplace. See [Ended Listings](#).
- **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down in the Action column:

- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).
- **Create Override:** Select this option to create a new override and apply it to this listing. See [Creating Listing Overrides](#).
- **Edit Assigned ASIN:** Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See [Edit Assigned ASIN](#).
- **Create Alias Seller SKU:** Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).
- **Switch to Fulfilled by Amazon/Merchant:** Select this option to change the fulfillment method associated to the order. See [Fulfilled By](#).
- **End Listing:** Select this option to remove the listing from the Amazon marketplace. See [Ended Listings](#).

See [Inactive Listings](#).

## Active

Listings that display on this tab include your Amazon listings that are active on the Amazon marketplace and that have been matched to a product in your Magento catalog.

In the **Actions** drop-down:

- **End Listing(s) on Amazon:** Select this option to remove all selected listings from the Amazon marketplace. See [Ended Listings](#).
- **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down in the action column:

- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).
- **Create Override:** Select this option to create a new override and apply it to this listing. See [Creating Listing Overrides](#).
- **Edit Assigned ASIN:** Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See [Edit Assigned ASIN](#).
- **Create Alias Seller SKU:** Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).

- **Switch to Fulfilled by Amazon/Merchant:** Select this option to change the fulfillment method associated to the order. See [Fulfilled By](#).
- **End Listing:** Select this option to remove the listing from the Amazon marketplace. See [Ended Listings](#).

See [Active Listings](#).

## Overrides

Listings that display on this tab include your Amazon listings that meet the criteria for a defined override and to which the override has been applied. Overrides take priority over any other account setting.

In the **Actions** drop-down:

- **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down in the Action column:

- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).
- **Edit Overrides:** Select this option to change the override settings for the listing. See [Editing Overrides](#).

See [Overrides](#).

## Ineligible

Listings that display on this tab include your Amazon listings that are no longer eligible to publish, based on your defined [listing settings](#).

In the **Actions** drop-down:

- **End Listing(s) on Amazon:** Select this option to remove all selected listings from the Amazon marketplace. See [Ended Listings](#).
- **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down:

- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).
- **Create Override:** Select this option to create a new override and apply it to this listing. See [Creating Listing Overrides](#).

- **Edit Assigned ASIN:** Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See [Edit Assigned ASIN](#).
- **Create Alias Seller SKU:** Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).
- **Switch to Fulfilled by Amazon/Merchant:** Select this option to change the fulfillment method associated to the order. See [Fulfilled By](#).
- **End Listing:** Select this option to remove the listing from the Amazon marketplace. See [Ended Listings](#).

See [Ineligible Listings](#).

## Ended

Listings that display on this tab include your Amazon listings that have manually been removed from Amazon.

In the **Actions** drop-down:

- **Publish Product to Amazon:** Select this option to republish the listing to the Amazon marketplace. See [Republish an Ended Amazon Listing](#).

In the **Select** drop-down in the Action column:

- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).
- **Publish Product to Amazon:** Select this option to republish the listing to the Amazon marketplace. See [Republish an Ended Amazon Listing](#).
- **Create Alias Seller SKU:** Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).

See [Ended Listings](#).

**Store Review**

Incomplete - 17 | New Third Party - 0 | Inactive - 0 | Active - 2 | Overrides - 0 | Ineligible - 9 | Ended - 0

Product listings that are missing information. Update Required Info in Action column. [View User Guide](#)

Filters | Default View | Columns | Export

Actions | 17 records found | 20 per page | 1 of 1

	Amazon Seller SKU	ASIN	Product Listing Name	Condition	Landed Price	Amazon Quantity	Status	Action
<input type="checkbox"/>	0062668277(CA)		<a href="#">A Parade of Elephants [Hardcover] Herkes, Kevin</a>	New	Update in progress	0	Multiple Matches Found	Select
<input type="checkbox"/>	0066237874(CA)		<a href="#">A Home in the Barn [Hardcover] Brown, Margaret Wise and Pinkney, Jerry</a>	New	Update in progress	0	Multiple Matches Found	Select
<input type="checkbox"/>	0072067480019(CA)		<a href="#">Ticonderoga Emphasis Fluorescent Highlighters, Pocket Style with Clip, Chisel Tip, Green, One Dozen (48001)</a>	New	Update in progress	0	Multiple Matches Found	Select

*Store Review*

## Amazon Sales Channel Home

Amazon Sales Channel Home is your landing page when accessing your Amazon Sales Channel. Amazon Sales Channel Home behaves as a dashboard to view and manage your Amazon stores, orders, attributes, listing changes, and communication errors, using a tabbed page format.



*Amazon Sales Channel Home tabs*

Tabs available on Amazon Sales Channel Home include:

- **Amazon Stores:** Review and access your created and linked Amazon stores. Tap on a store name to review detailed information through the store's **dashboard**.
- **Orders:** View and manage orders submitted by customers through your Amazon store and Amazon Seller Central account. These orders may be reviewed, managed, and shipped through Magento. Any updates in status, ordered product, payments, cancellations, and shipments sync between Amazon and Magento.
- **Attributes:** View and manage linked Magento and Amazon attributes for your product catalog. Directly edit or create and link attributes directly through Magento to sync automatically with Amazon.
- **Listing Changes Log:** Review a log of changes in listings on Amazon by the Seller SKU, with captured details for the listing action such as updates to pricing and quantities, comments for the change, and more.

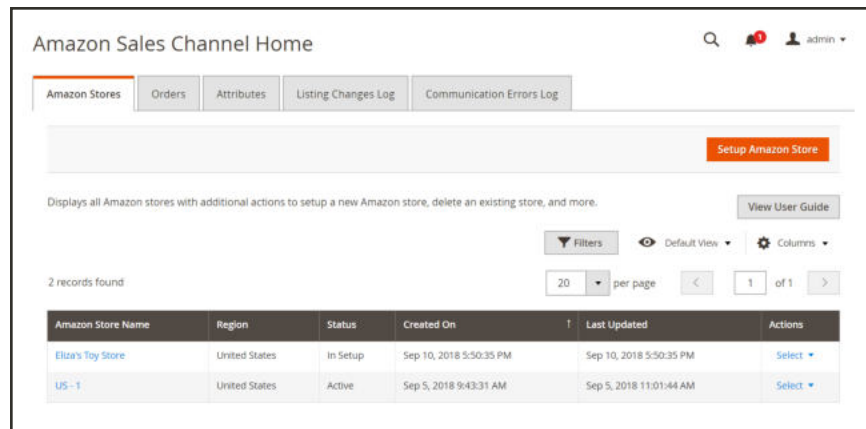
- **Communication Errors Log:** Review communication errors caught between Amazon and Magento. These errors track issues with data syncs for products and orders, invalid orders, missing data, and much more. Access your Amazon store to learn more and resolve the error.

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

**To access Amazon Sales Channel:**

1. On the Admin sidebar, tap **Marketing**.
2. Then under Channels, tap **Amazon**.

Amazon Sales Channel Home displays with the **Amazon Stores** tab displayed by default



*Amazon Sales Channel Home: Amazon Stores tab*

## Workspace Controls

**Amazon Sales Channel Home** have some common workspace controls including Filters, Default View, Columns, and Export. Not all pages will have the same control options.



*Amazon Sales Channel Workspace Controls Examples*

### Actions

The Actions drop-down option displays a list of actions that are available to a user for a screen. When selected, the action is applied to all selected items. To apply an action to a specific item, mark the checkbox in the first column of each item and choose an option in the **Actions** drop-down.

For example, the **Actions** drop-down on the Attributes screen includes the "Re-import Product Attribute Values" action. Choosing this action will ping the corresponding Amazon Seller Central account and refresh the Magento data for each of the Amazon store items checked in the left-side column.



*Actions Drop Down Example*

### Filters

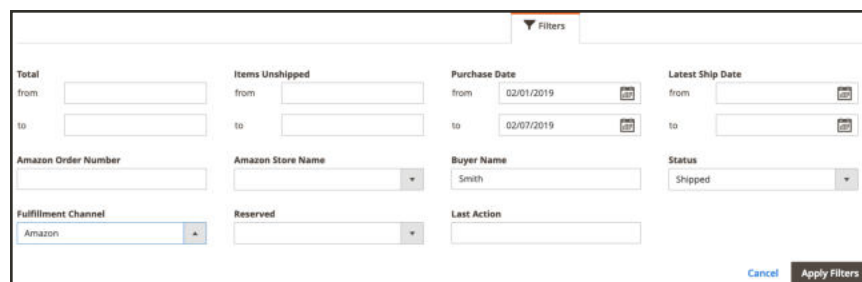
The Filters control displays options for narrowing the data displayed in the table. Filter options are based on the columns selected in the Columns control. Filter options only display for columns enabled in the Columns control.

Filters controls can include dynamic calendars to narrow data for specified dates, drop-down menus for columns that have pre-defined selections, and free-text fields that may contain custom data.

The example below shows the settings for filtering the list of orders to display only orders that meet the following criteria:

- Orders placed between 2/01/2019 and 2/07/2019, and
- Orders with a buyer named of "Smith," and
- Orders with a status of "Shipped."

When you have your filtering options set, tap **Apply Filters** to filter the data listed. Tap Cancel to exit the Filters control without applying.



*Filters Control Example*

Once you've applied filters to your data, **Active Filters** information will display. You can tap the  icon to clear a specific filter option or tap **Clear All** to clear all applied filters.



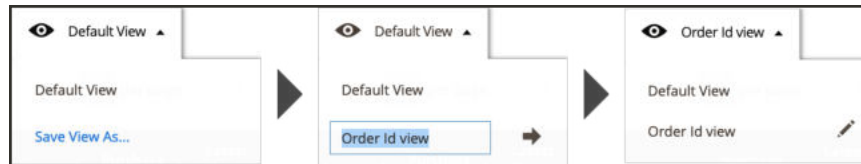
Active Filters Example

### View

The View control is based on the default columns for page, thus it is named the Default View. You can add or remove available columns using the Columns control. When you customize your columns, you can then save the view as a custom view in the View control.

When you have your columns added or removed from the page display:

1. Tap **Default View** and choose **Save View As....**
2. Enter a name for view.
3. Tap the arrow icon to save the custom view.



View Control Example

In this example, we added the Order Id column in the Column control and then saved it as a custom view. Notice that after we saved our custom view name, the name of the View changed from Default View to the name we entered.

You can toggle between the views by selecting the desired view in the View drop-down menu.

If you want to delete or change the name of your custom view, tap the pencil icon. You can then enter a different name, or you can tap the trash can icon to delete the custom view. The Default View cannot be deleted.

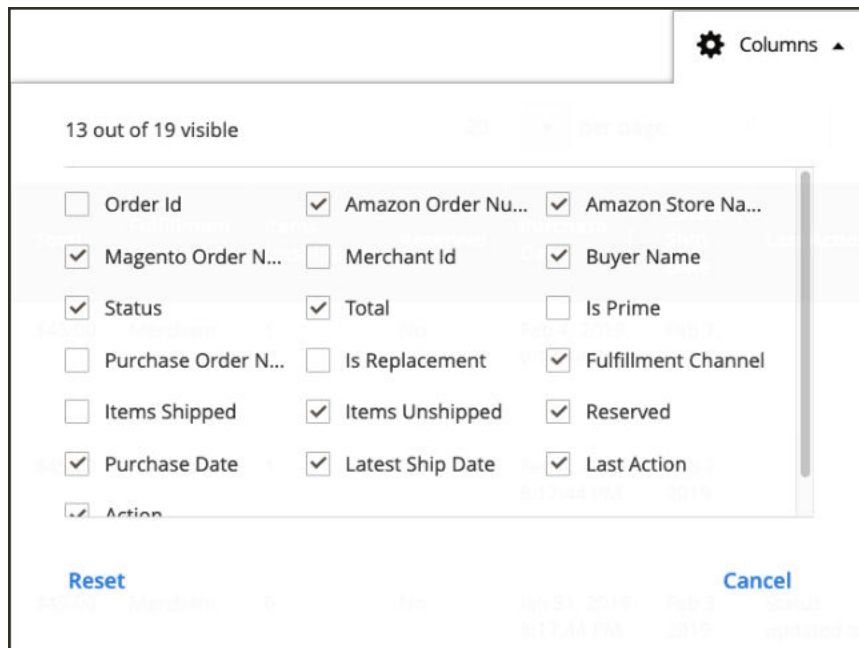
### Columns

The Columns control allows you to add or remove columns of data from the page display. Each Amazon Sales Channel page has a preset combination of data columns, but most pages have additional columns available. If no additional columns are available, you can still remove default columns from display.

The example below shows a Columns control. The checked options correspond to the column headers that are displayed on the page.

- To add a data column to your page, check the checkbox.
- To remove a data column from your page, uncheck the checkbox.





*Columns Control Example*

Checkbox changes display immediately. If you make changes and exit the page, the page returns to the default column display. For changes you make regularly, you can save the columns changes as a custom view in the View control. Then you can toggle in the View control without having to add or remove columns manually.

You can tap **Reset** to set the options back to default settings, or you can tap **Cancel** to exit without your changes.

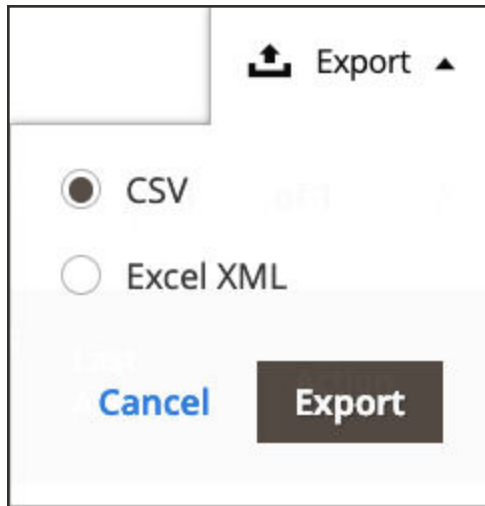
## Export

The Export option allows you to export the displayed data to a data file than can be imported to a third-party software or separate database. Data exported is limited to the data displayed. You'll want to make sure you add or remove columns if needed prior to using the Export control.

When ready to export your data, select an export format option and tap **Export**.

- CSV - a comma-separated value file containing plain text data
- Excel XML - an XML-based, spreadsheet data format (typically used for Excel users)

The generated data file saves automatically to your designated folder for downloads.



*Export Control Example*

## Managing Stores

When accessing your Amazon Sales Channel, the Amazon Stores tab displays by default on Amazon Sales Channel Home. You can access Amazon Sales Channel Home by tapping **Marketing** in the admin sidebar. Then under Channels, tap **Amazon**.

The Amazon Stores tab provides a list of your Amazon stores along with some basic statistics and management options. Displayed statistics include each store's status, date created, last updated, available management actions, and defined region. Management options (available in the **Select** drop-down in the Actions column) include:

- **Manage Store:** The action for this option is dependent on the status of the store selected.

If the store is in Active or Inactive status, selecting this option displays the **store's dashboard** giving you access to the store's data, revenue and order information, and listing and order settings.

If the store is in Setup status, selecting this option displays the **Store Review** step for the store's setup process, where you can review and modify your stores settings, listing and order settings, and pricing rules before completing setup.

- **Change to Active/Inactive:** Select this option if you want to change the status of the store selected. This feature allows you to control order and listing activity at the Amazon regional level, because each Amazon store has a defined region during setup.

Changing an Inactive store to Active status will activate listings and order activity for the store, using the stores current setup (listing settings, price rules, overrides, etc.)

Changing an Active store to Inactive status will suspend listings and order activity for the store. An Inactive store will retain all settings and listings, but will temporarily stop the synchronization of pricing, quantity, and order management until the store is changed to Active status. This feature allows you to control your store activity at the Regional level without the need to recreate or reintegrate your Amazon store or the loss of historical order and sales data.

- **Delete Store:** Select this option if you wish to delete an existing Amazon store and its integration settings with your Amazon Seller Central account. Deleting the account will remove the store from Amazon Sales Channel, along with all account settings, listings, logs and other information related to this store. The account cannot be retrieved after deletion.

To change the website assigned to the store during integration, you must delete the store and add the store again with the different website through the onboarding process.

You will notice some **workspace controls** that are common throughout the Amazon Sales Channel.

One workspace control unique to the Amazon Stores tab is the **Setup Amazon Store** button. When you want to set up a new Amazon store, tap this button and begin the **onboarding** for the new store.

The screenshot shows the 'Amazon Sales Channel Home' dashboard. At the top, there are navigation tabs: 'Amazon Stores' (selected), 'Orders', 'Attributes', 'Listing Changes Log', and 'Communication Errors Log'. A search icon, a notification bell with '1', and a user profile 'admin' are in the top right. Below the tabs is a 'Setup Amazon Store' button. A descriptive text states: 'Displays all Amazon stores with additional actions to setup a new Amazon store, delete an existing store, and more.' To the right is a 'View User Guide' button. Below this is a 'Filters' button, 'Default View' (with an eye icon), and 'Columns' (with a gear icon). A pagination bar shows '2 records found', '20 per page', and '1 of 1'. The main content is a table with the following data:

Amazon Store Name	Region	Status	Created On	Last Updated	Actions
<a href="#">Eliza's Toy Store</a>	United States	In Setup	Sep 10, 2018 5:50:35 PM	Sep 10, 2018 5:50:35 PM	<a href="#">Select</a>
<a href="#">US - 1</a>	United States	Active	Sep 5, 2018 9:43:31 AM	Sep 5, 2018 11:01:44 AM	<a href="#">Select</a>

*Amazon Stores*

## Default Columns

COLUMN	DESCRIPTION
Amazon Store Name	The name defined for each store during its <a href="#">setup</a> .
Region	The region (defined during <a href="#">setup</a> ) in which your Amazon store sells. Example: United States, Canada, United Kingdom.
Status	The status of your store. Options: <ul style="list-style-type: none"> <li>• In Setup: Store setup is incomplete and not available for sales activity. Accessing or managing the store opens in <a href="#">Onboarding steps</a>.</li> <li>• Active: Store setup is complete and verified with Amazon and is available for sales activity. To review revenue and update settings, see <a href="#">Store Dashboard</a>.</li> <li>• Inactive: Store setup is complete, but is not in use or available for sales activity. You may want to set to inactive to pause sales on Amazon. If active, sales revenue and additional settings save to update prior to activating. To review revenue and update settings, see <a href="#">Store Dashboard</a>.</li> </ul>
Created On	The date the Amazon store was created in Amazon Sales Channel.
Last Updated	The date of the most recent change to the Amazon store's setup.
Actions	Lists available actions that can be applied to the store listed. Tap the <b>Select</b> drop-down and choose an option. Options: <ul style="list-style-type: none"> <li><a href="#">Manage Store</a></li> <li><a href="#">Change To Active/Inactive</a></li> <li><a href="#">Delete Store</a></li> </ul>

## Optional Columns

COLUMN	DESCRIPTION
Merchant Id	This is the code identifier assigned by Magento for the Amazon Sales Channel store when the store was created and integrated.





## Amazon Store Dashboard

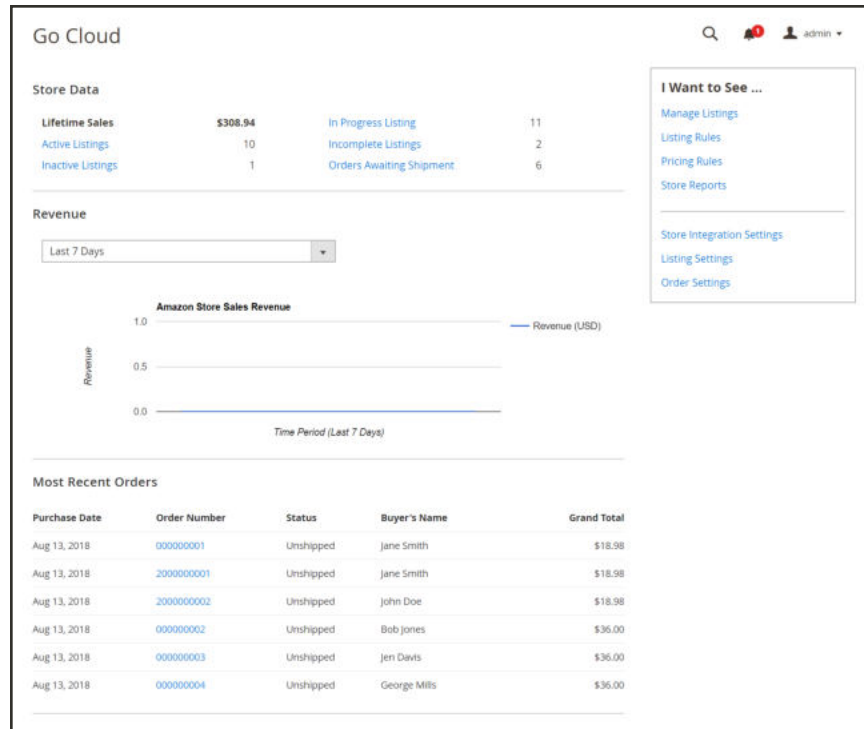
On the Amazon Stores tab in Amazon Sales Channel Home, you can tap any store name (in Active or Inactive status) to access the store's dashboard.

The store dashboard is the primary location for you to view the activity for one of your Amazon stores. With your Amazon Seller stores added and integrated, all orders and sales track through your store data view. On the dashboard, you can view revenue, track trends, and review sales data for all listings. All listings and sales are further grouped and tracked by listing type, including active, inactive, in-progress, incomplete, and orders awaiting shipment.

You can also review and update your store settings, integration settings, listing settings, price rules, order settings, and more from the store dashboard. On the dashboard, tap one of your integrated stores. This store dashboard opens for stores in **Active** and **inactive** status and displays data on sales, access for listings, and configuration options for the store.

The store dashboard includes the following sections of data and access to other information:

- **Store Data:** Displays sales data and links to your listings by status.
- **Revenue:** Displays a graphical representation for the store's revenue for the last 7 or 30 days.
- **Most Recent Orders:** Displays the most recent orders that have been received from your Amazon listings association with the store.
- **I Want to See...:** Provides links to view and update your various store, listing, rules, and order settings.



*Amazon Store Dashboard*

If you select a store with the **In Setup** status, the Onboarding steps open with populated data saved for the store integration.

## Amazon Store Dashboard

SECTION	DESCRIPTION
Store Data	<p>Details about your store including lifetime sales, listings by status, and orders awaiting shipment. Tap the a link to view details: Options:</p> <ul style="list-style-type: none"> <li>• <a href="#">Active Listings</a></li> <li>• <a href="#">Inactive Listings</a></li> <li>• <a href="#">In Progress Listing</a></li> <li>• <a href="#">Incomplete Listings</a></li> <li>• <a href="#">Orders Awaiting Shipments</a></li> </ul>
Revenue	<p>A line graph of your sales revenue over a period of time. You can select to view either the data for last 7 days or the data for the last 30 days. The default view option is "Last 7 Days." You can tap in the drop-down to change the time period for the graph.</p>



## Amazon Store Dashboard (cont.)

SECTION	DESCRIPTION
	This graph displays the store data from only your Amazon Seller Central account.
Most Recent Orders	A listing of the basic details for the most recent orders that have been placed in the Amazon store (through your Amazon Seller Central account). Data includes Purchase Date, Order Number, Status, Buyer's Name, and purchase Grand Total. Tapping an order number will display the order details, similar to the <a href="#">Magento Order View</a> .
I Want to See...	Links to configurations and settings for the store: <ul style="list-style-type: none"><li>• <a href="#">Manage Listings</a></li><li>• <a href="#">Listing Rules</a></li><li>• <a href="#">Pricing Rules</a></li><li>• <a href="#">Store Reports</a></li><li>• <a href="#">Store Integration Settings</a></li><li>• <a href="#">Listing Settings</a></li><li>• <a href="#">Order Settings</a></li></ul>

## Store Integration Settings

After integrating your store, review and configure the integration settings store through the Amazon Store Dashboard. These settings display for **Inactive** and **Active** stores. Stores with the **In Setup** status can be configured through the [Onboarding steps](#).

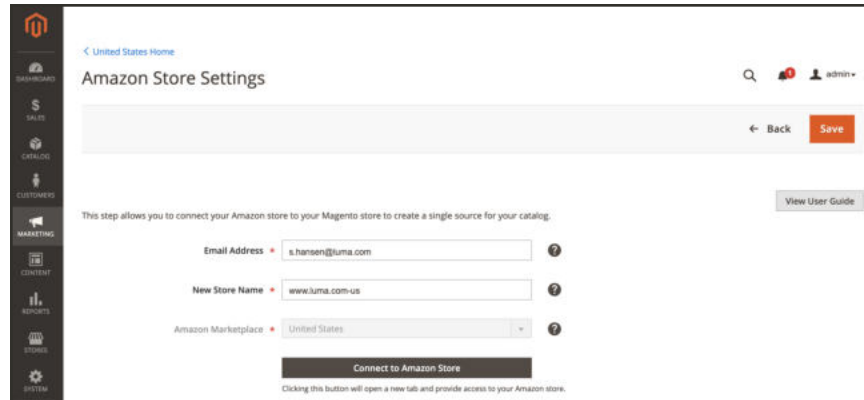
### To modify store integration settings:

1. Tap a store name in the Amazon Stores tab in Amazon Sales Channel Home to display the store's dashboard.
2. On the [store's dashboard](#), under the I Want To... header, tap **Store Integration Settings**.
3. For **Email Address**, update your preferred contact email address.
4. For **New Store Name**, update the descriptive name for your new Amazon Sales Channel store. This name displays on the [Amazon Stores](#) tab.

This name is used as a Magento reference only and will identify the store in the list on the Amazon Sales Channel Home page. You will want to make it something your team can easily identify. For example, your Amazon store that sells in the United States region might be named "Amazon Store USA".

5. The Amazon Marketplace setting cannot be updated.

6. Tap **Save**.



*Update Store Integration Settings*

## Amazon Sales Channel Settings

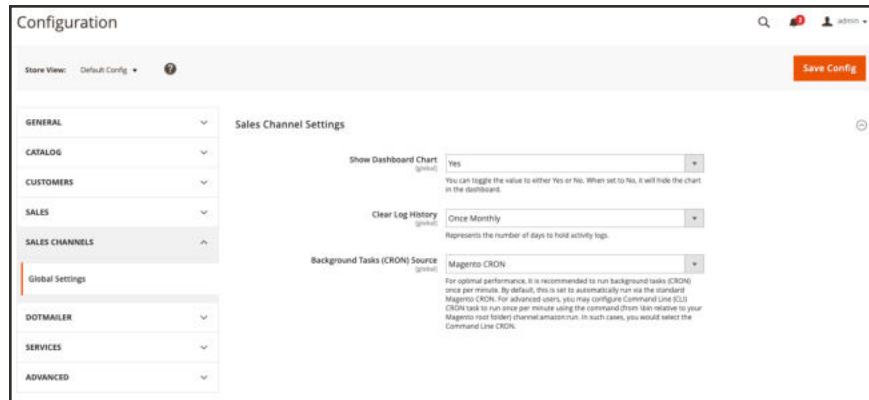
Amazon Sales Channel settings are defaulted during installation of the extension. These settings can be modified and are located in your stores configuration settings. These settings include:

- Whether or not to display the **Revenue** section on the store's dashboard.
- Intervals for clearing activity log history.
- Selection of the Cron source.

### To modify your Amazon Sales Channel settings:

1. Tap **Stores** in the Admin sidebar. Then under Settings, tap **Configuration**.
2. Scroll down and tap **Sales Channels** and then **Global Settings**. The Sales Channel Settings screen displays.
3. For **Show Dashboard Chart**, select an option in the drop-down.
  - **Yes:** (Default) Select this option if you want the **Revenue** section to display on the store's **dashboard**. If set to "Yes," the **Revenue** section displays a graphical representation for the store's revenue for the last 7 or 30 days.
  - **No:** Select this option if you do not want the **Revenue** section to display on the store's **dashboard**.
4. For **Clear Log History**, select an option in the drop-down. Options:
  - **Once Daily:** Select this option to clear your store's activity history once daily.
  - **Once Weekly:** Select this option to clear your store's activity history once weekly.
  - **Once Monthly:** (Default) Select this option to clear your store's activity history once monthly.

5. For **Background Tasks (CRON)** Source, select "Magento CRON" in the drop-down. This tells Amazon Sales Channel to use your Magento Cron settings to determine communication and data sync intervals with Amazon Seller Central.
6. Tap **Save Config.**



*Amazon Sales Channel Global Settings*

## Managing Attributes

Amazon and Magento both use a system of product properties, known as attributes, used to define a product. Attributes define the description, content, images, prices, and various data for your products.

Successful communication between Magento and Amazon requires that Magento attributes be correctly mapped to the corresponding Amazon attribute. When integrating with Amazon, you will link (or map) these Magento attributes to Amazon attributes. When complete, Magento can sync and maintain your Amazon listings with your Magento product catalog.

For example, imagine you have the same item in your Magento catalog and Amazon listings. One attribute for the product might be the listing price of the item. The name for the listing price in Magento might be named "Price," while the listing price for Amazon might be named "ListingPrice." You'll need to tell Magento that when communicating with Amazon, the Magento attribute named "Price" is the same as the Amazon attribute named "ListingPrice." This process is called managing attributes, and includes creating new and editing existing attributes. Making sure that attributes are properly matched will ensure correct communication between Magento and Amazon.

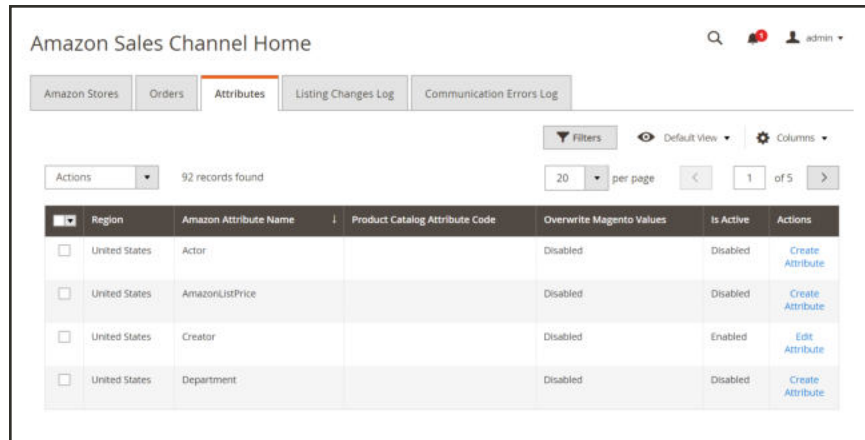
Once attribute matching is set up, Magento can communicate product information back and forth with Amazon. If you have Amazon product listings, Magento can import your Amazon products and details into your Magento catalog, allowing you to manage your Amazon listings from a single, central catalog of products.

The Amazon Sales Channel allows you to access, review, create, and manage attributes, as needed. If you add a new attribute to your Magento catalog, you may need to update those values across all products. For more information on Magento attribute sets and values, see [Product Attributes](#).

### Attribute Options

Access and view all linked attributes through the Attributes tab on the Amazon Sales Channel Home screen. View this page through the Amazon Sales Channel Home dashboard. Through this page you can:

- [Create and edit attributes](#)
- [Review Amazon attribute values](#)



*Attribute Management*

## Default Columns

COLUMN	DESCRIPTION
Region	The region for sales activity defined in the Amazon Marketplace when the Amazon store was set up in the Amazon Sales Channel.
Amazon Attribute Name	The name of the attribute defined in the Amazon Seller Central account.
Product Catalog Attribute Code	The name of the Magento attribute that is matched with the Amazon attribute name. If the attribute is not matched to a Magento attribute, this field will be blank.
Overwrite Magento Values	If set to "Enabled", the Amazon attribute value will overwrite the corresponding Magento attribute value. This setting only applies when a Magento attribute exists and is matched with the Amazon attribute. Options: Disabled / Enabled
Is Active	If set to "Enabled", the Amazon and Magento attributes will update stay in sync.
Actions	Links to the <b>Create / Edit Attribute</b> screen for the selected attribute. If a Magento attribute does not exist, the <b>Create Attribute</b> link displays. If a Magento attribute is matched to the Amazon attribute, the <b>Edit Attribute</b> link displays.

## Optional Column

COLUMN	DESCRIPTION
Id	The numerical identifier for the Amazon attribute.

## Creating and Editing Amazon Attributes

You may need to create or update Amazon and Magento attributes as you sell through Amazon and update your stores. Review the current Amazon attributes and linked Magento attributes through the [Managing Attributes](#) tab of the Amazon Sales Channel Home dashboard. The Actions column provides actions to either [create a new Magento attribute](#) for an unlinked Amazon attribute or [edit an existing linked attribute](#). If an attribute is linked, you have an

As you create and update attributes, you may want to verify the attribute values for Magento and Amazon products. These values may differ if you do not sync and import values from Amazon. To review Amazon values for these attributes, see [Reviewing Amazon Attribute Values](#). If you want to change those values, continue through the following instructions to create new attributes or edit existing attribute links between Amazon and Magento.

### To create an attribute:

These steps create a new Magento attribute and links it to the selected Amazon attribute. Depending on configurations, the values may start syncing between catalogs.

1. On the Admin sidebar, tap **Marketing**. Then under Channels, choose **Amazon**.
2. Tap **Attributes** tab. Locate an Amazon attribute and tap **Create Attribute**.
3. To enable or disable the syncing of the Amazon values to the linked Magento attribute, toggle **Is Active**. When activated to "Yes", the values sync according to your configuration.
4. To create a new Magento attribute to link to this Amazon attribute, select "Create New Magento Attribute" for **Select Magento Product Attribute**. The attribute will link to the displayed Amazon Attribute Name.
5. Enter a **Magento Product Attribute Name**.
6. Enter a **Magento Product Attribute Code**. This value must be all lowercase without spaces.
7. For **Attribute Set Ids**, select an Magento Attribute Set to assign the attribute to. Attributes tend to be part of an attribute set, such as a set for colors having attributes for blue, green, yellow, and red.
8. Select the value **Type** of the attribute value, such as text, numbers, and so on. The selection affects the allowed value for the attribute.
9. For **Use for Promo Rule Conditions**, toggle to allow the Magento attribute to be available for a parameter within your promotional conditions.
10. For **Used in Search**, toggle if the attribute and value can be used in product searches.
11. For **Comparable on Storefront**, toggle if the attribute value can be used in Amazon's "Compare By" functionality.

12. Select the Magento **scope** for the Magento attribute. And select one or more Store Views to import Amazon values into. If you select "All Store Views (Global)", this syncs and saves values to all store views. You may only want to sync values to specific store views.
13. When complete, tap **Save Attribute Settings**.

After saving, you may want to edit the attribute to review settings and matching Amazon and Magento values for the attribute. You also have an additional option to indicate if Amazon values should overwrite Magento values.

*Create Attribute Settings*

## Field Descriptions

FIELD	DESCRIPTION
Is Active	Indicates if this attribute is live and actively syncs between Amazon and Magento. Set to <b>Yes</b> to ensure the attribute values from Amazon and Magento stay in sync for the selected attribute.
Select Magento Product Attribute	Indicates the selected Magento attribute you want linked to the listed Amazon Attribute Name. When creating a new Magento attribute, select <b>Create New Magento Attribute</b> .
Amazon Attribute Name	Displays the name of the Amazon attribute as defined in Amazon Seller Central. The selected Magento attribute links to this Amazon attribute. You cannot edit this value through Magento.
Magento Product Attribute Name	Indicates the Magento attribute name, or label.
Magento Product Attribute Code	Indicates the Magento attribute code, all in lowercase characters without spaces.
Attribute Set Ids	Indicates the Magento Attribute Set to assign the attribute to. Attributes tend to be part of an attribute set, such as a set for colors having attributes for blue, green, yellow, and red.
Type	Indicates the value type of the attribute value, such as text, numbers, and so on. The selection affects the allowed value for the attribute.
Use for Promo Rule Conditions	Toggle to <b>Yes</b> to allow the Magento attribute to be available for a parameter within your promotional conditions.
Used in Search	Indicates if the attribute and value can be used in product searches.
Comparable on Storefront	Indicates if the attribute value can be used in Amazon's "Compare By" functionality.
Magento Product Attribute Scope	Indicates the Magento <b>scope</b> for the Magento attribute.
Store Views (to import values into to)	Select your Magento <b>store view</b> to sync the Amazon attribute values to. Selecting All Store Views updates the value across all Magento store views.



## To edit an attribute:

1. On the Admin sidebar, tap **Marketing**. Then under Channels, choose **Amazon**.
2. Tap **Attributes** tab. Locate an Amazon attribute and tap **Edit Attribute**.
3. To enable or disable the syncing of the Amazon values to the linked Magento attribute, toggle **Is Active**. When activated to "Yes", the values sync according to your configuration.
4. Tap the drop-down to **Select Magento Product Attribute** to link to the displayed Amazon Attribute Name.
5. Indicate if you want the Amazon synced value to overwrite existing Magento values. For example, you may not want to overwrite the prices from Amazon into Magento.
  - Do Not Overwrite Existing Magento Values: Retains the Magento value, keeping different values for Magento and Amazon stores.
  - Overwrite Existing Magento Values: Saves the Amazon value over the Magento value in the Magento product catalog.
6. Select one or more Store Views to import Amazon values into. If you select "All Store Views (Global)", this syncs and saves values to all store views. You may only want to sync values to specific store views.
7. When complete, tap **Save Attribute Settings**.

The screenshot shows the 'Create / Edit Attribute' form in the Magento Admin interface. The form is titled 'Create / Edit Attribute' and has a 'Back' button and a 'Save Attribute Settings' button. It is divided into two tabs: 'Attribute Settings' (active) and 'Matching Attribute Values'. The 'Attribute Settings' tab contains a toggle for 'Is Active' (set to 'No'), a dropdown for 'Select Magento Product Attribute' (set to 'AmazonListPrice'), a text input for 'Amazon Attribute Name' (set to 'AmazonListPrice'), a dropdown for 'Overwrite Existing Value' (set to 'Do Not Overwrite Existing Magento Values'), a dropdown for 'Magento Product Attribute Scope' (set to 'Store View'), and a list of 'Store Views (to import values into)' including 'All Store Views (Global)', 'Default Store View', and 'CA Store View'. A 'View User Guide' button is also present.

*Edit Attribute Settings*

## Field Descriptions

FIELD	DESCRIPTION
Is Active	Indicates if this attribute is live and actively syncs between Amazon and Magento. Set to <b>Yes</b> to ensure the attribute values from Amazon and Magento stay in sync for the selected attribute.
Select Magento Product Attribute	Indicates the selected Magento attribute you want linked to the listed Amazon Attribute Name. If you want to change the linked Magento attribute, select a different attribute from the drop-down list. Values sync according to configurations.
Amazon Attribute Name	Displays the name of the Amazon attribute as defined in Amazon Seller Central. The selected Magento attribute links to this Amazon attribute. You cannot edit this value through Magento.
Overwrite Existing Value	<p>Indicates if the Amazon attribute values will overwrite existing Magento values. This affects all products with this Magento attribute.</p> <p>Default: Do Not Overwrite Existing Magento Values</p> <ul style="list-style-type: none"><li>• Do Not Overwrite Existing Magento Values: Retains the Magento value, keeping different values for Magento and Amazon stores.</li><li>• Overwrite Existing Magento Values: Saves the Amazon value over the Magento value in the Magento product catalog.</li></ul>
Magento Product Attribute Scope	Indicates the Magento <b>scope</b> for the Magento attribute.
Store Views (to import values into to)	Select your Magento <b>store view</b> to sync the Amazon attribute values to. Selecting All Store Views updates the value across all Magento store views.

## Reviewing Amazon Attribute Values

As you map Amazon attributes to Magento attributes, Amazon Sales Channel tracks and provides a filterable list of all Amazon values. Use this page to verify values for your linked Magento attributes correctly sync between Magento and Amazon. You can review synced values for Amazon attribute linked or not linked to a Magento attribute. To create or edit your Amazon attributes, see [Creating and Editing Attributes](#).

The Amazon Value differs depending on the attribute type and the Amazon attribute you view. For example, a listed Amazon value for Label would be a text value while AmazonListPrice would be a numerical amount. The status indicates if the Amazon value has been imported.

### To review attribute values:

1. On the Admin sidebar, tap **Marketing**. Then under Channels, choose **Amazon**.
2. Tap the **Attributes** tab. Locate an Amazon attribute and tap either **Create Attribute** or **Edit Attribute**.
3. Tap the **Matching Attribute Values** tab.
4. To further review Magento product information, tap a linked Magento Product SKU. This opens the Magento product edit page.

Region	Magento Product SKU	ASIN	Amazon Value	Status
United States	<a href="#">0181177052</a>	0181177052	64.99	Not Imported
United States	<a href="#">737488380335</a>	80099NF60	64.99	Not Imported
United States	<a href="#">737488380335</a>	80099NF60	64.99	Not Imported
United States	<a href="#">737488380335</a>	80099NF60	64.99	Not Imported
United States	<a href="#">737488380335</a>	80099NF60	64.99	Not Imported

*Managing Attribute Values*

### Field Descriptions

FIELD	DESCRIPTION
Region	The region for sales activity defined in the Amazon Marketplace when the Amazon store was set up in the Amazon Sales Channel.
Magento Product SKU	Indicates the Magento products synced with the Amazon store. The value is a product ID assigned by Magento and linked to a product in the catalog. Tap the link to open the product in Magento.
ASIN	Indicates the Amazon Standard Identification Number (ASIN) 10-character alphanumeric unique identifier assigned to the product by Amazon for product identification.
Amazon Value	Indicates the value for the selected attribute. The Amazon Value differs depending on the attribute type and the Amazon attribute you view. For example, a listed Amazon value for Label would be a text value while AmazonListPrice would be a numerical amount. The status indicates if the Amazon value has been

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	imported.
Status	Indicates if the attribute values have been imported into Magento and linked to a Magento attribute. Options: Not Imported / Imported

# Managing Listing Settings

Listing settings are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default.

Listing settings define how your Magento catalog products are listed on Amazon. Your listing settings consist of several categories that allow you to define the interactions and communication between Amazon Sales Channel and your respective Amazon Seller Central account.

When configuring your listing settings, you define your eligibility rules for your Magento catalog products to automatically published to Amazon as new listings, set up your Amazon listing prices based on your Magento catalog or on competitor pricing, define your fulfillment method, and more.

Settings are grouped and available in sections, to expand and configure as needed.

## To configure listing settings:

1. Expand each section to review and configure listing settings. Complete all required fields to continue.
  - **Product Listing Actions:** Defines if eligible Magento products automatically publish to Amazon and the default handling time for shipments (2 is default).
  - **Third Party Listings:** Defines if Amazon Seller Account product listings should be imported into your Magento catalog.
  - **Listing Price:** Cap Magento pricing attributes and configure pricing settings.
  - **(B2B) Business Price:** Define your tiered-pricing settings when selling to another business.
  - **Stock / Quantity:** Configure your stock management thresholds for inventory management.
  - **Fulfilled By:** Define who fulfills orders.
  - **Catalog Search:** Configure your search parameters to ensure a reliable process for matching your Magento catalog products with your Amazon product listings.
  - **Product Listing Condition:** Configure your settings and values for product "condition." Condition is a product detail that is required by Amazon, but is not required for your Magento catalog products.
2. Tap **Save Listing Settings** to save your changes.

Listing Settings

Search, Notifications, admin

← Back   Reset   Save Listing Settings

View User Guide

- Product Listing Actions
- Third Party Listings
- Listing Price
- (B2B) Business Price
- Stock / Quantity
- Fulfilled By
- Catalog Search
- Product Listing Condition

*Listing Settings*

# Product Listing Actions

Product Listing Actions settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default.

The Product Listing Actions section defines how your catalog interacts with Amazon. These settings include:

- Indicate if your Magento catalog products that meet Amazon eligibility requirements are automatically sent to your Amazon Seller Central account to create new listings.
- Set the default handling time for an order. This value defines the number of days generally required for you to process and ship an order. For example, if someone selects 2-day shipping, that shipping transit time does not start until processing completes and packages are handed off to a carrier. The total delivery time is (handling time + transit time + any holidays).

## To configure Product Listing Actions settings:

1. Expand the **Product Listing Actions** section.
2. For **Automatic List Action** (required), choose an option in drop-down:
  - **Automatically List Eligible Products:** Select this option if you want your Magento catalog products (that meet Amazon's eligibility requirements) to automatically push to Amazon and create new Amazon Listings.
  - **Do Not Automatically List Eligible Products:** Select this option if you want to manually select your eligible Magento catalog products and create new Amazon Listings. When selected, catalog products that meet your listing criteria and contain all required information display on the Ready to List tab for manual publishing. If not selected, the Ready to List tab does not display.
3. For **Default Handling Time** (required), enter a numerical amount of lead time days needed before shipment. The default value is 2 days.

This default handling time value is only effective for Amazon listings created through Amazon Sales Channel. Any Amazon listings that were created in your Amazon Seller Central account use the default handling time set for the listing in Amazon.

**Product Listing Actions**

Control how your product catalog interacts with the Amazon marketplace

Automatic List Action \*  ?

Default Handling Time \*  ?

*Product Listing Actions*

## Field Descriptions

FIELD	DESCRIPTION
Automatic List Action	<p>Options:</p> <ul style="list-style-type: none"> <li>Automatically List Eligible Products: (Recommended) Select this option if you want your Magento catalog products (that meet Amazon's eligibility requirements) to automatically push to Amazon and create new Amazon Listings</li> <li>Do Not Automatically List Eligible Products: Select this option if you want to manually select eligible Magento catalog products and create new Amazon Listings. When selected, catalog products that meet your listing criteria and contain all required information display on the <b>Ready to List</b> tab for manual publishing. If not selected, the Ready to List tab does not display.</li> </ul>
Default Handling Time	<p>The numerical value that represents the number of days, in general, that it takes you to process and ship your orders. The default value is 2. This value is used for Amazon listings created in Magento and published to Amazon. The default handling time for Amazon listings prior to integrating with Magento are not affected by this field.</p> <p>The value defined in Amazon Sales Channel <i>does not</i> replace the default handling time defined in an existing Amazon listing. When a Handling Time Override is enabled and then removed, the Handling Time for an order reverts to the value defined here.</p> <p>If you have products that have different handling times, you can create a Handling Time Override at the product-specific level. You can manage handling time overrides in the <b>Overrides tool</b>, giving you flexibility to manage your product fulfillment. If there is no handling time override in Magento for a product, the handling time default will be the value defined in the Amazon listing.</p>



## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<p>Handling Time is a regional attribute. This means that when the value is changed for a listing, the change affects all listings that share the Amazon Seller SKU in all Amazon stores that exist for the same region (as defined when the store was <b>integrated</b>). However, changing the value for a shared Amazon Seller SKU in the North America region will not affect the same products listed in a store with a different defined region. The store for the region with the oldest creation date will control the priority for the Default Handling Time settings.</p>

## Third Party Listings

Third Party Listing settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap **Third Party Listings** to expand the section.

The Third Party Listings section defines if your Magento catalog will import products from your existing Amazon Seller Central listings. We recommend importing listings from Amazon, to ensure all listings have matching Magento products. By having your listings as part of your Magento catalog, you can manage all of your products from a single catalog and leverage Amazon Sales Channel features including fulfillment and order management with Amazon, intelligent repricing, and quantity management.

When you set to "Import listing", Amazon Sales Channel imports your Amazon listings into your Magento catalog, attempting to match them to existing products. If a match is not automatically found, you can import the Amazon listing as a new Magento product or manually match the listing to a product.

If you select to import listings, select the Magento attributes with values for Amazon Seller SKU and Amazon ASIN. If you do not have Magento [product attributes](#), consider creating and assigning them. Mapping these attributes helps correctly match imported Amazon listings to your Magento products.

The initial listing import initiates when completing your store's setup during onboarding. After setup is complete and based on your cron settings, Magento continually checks for newly added Amazon listings (not created in Amazon Sales Channel) and updates your catalog according to these settings.

### To configure Third Party Listings settings:

1. Expand the **Third Party Listings** section.
2. For **Import Third Party Listings** (required), select an option in the drop down:
  - **Import Listing:** Select this option if you want products and information from your Amazon listings to import into your Magento catalog of products. This is the recommended and the default setting.
  - **Do Not Import Listing:** Select this option if you want to manually [create and assign new products](#) to your Magento catalog for your Amazon listings.

The following options fields are only active when you select to "Import Listing."

3. For **Attribute That Contains Amazon Seller SKU**, select the Magento attribute that matches to the Amazon Seller SKU value.
4. For **Attribute That Contains Amazon ASIN**, select the Magento attribute that you created and match it to the Amazon ASIN.

If you did not create these Magento attributes for your Amazon listings, see [Creating Attributes for Amazon Matching](#) for information.

Third Party Listings

Control whether to import existing listings contained within the Amazon marketplace

Import Third Party Listings \* Import Listing ?

Attribute That Contains Amazon Seller SKU SKU ?

Attribute That Contains Amazon ASIN Amazon ASIN ?

*Third Party Listings*

## Field Descriptions

FIELD	DESCRIPTION
Import Third Party Listings	Required field. Options: <ul style="list-style-type: none"><li>• Import Listing: (Recommended) Select this option if you want products and information from your Amazon listings to import into your Magento catalog of products. This is the default setting.</li><li>• Do Not Import Listing: Select this option if you want to manually <a href="#">create and assign new products</a> to your Magento catalog for your Amazon listings.</li></ul>
Attribute That Contains Amazon Seller SKU	Only active when "Import Listing" is selected. Select the Magento attribute to match to the Amazon attribute for the Amazon Seller SKU . This attribute should have been created during onboarding. See <a href="#">Creating Amazon Product Attributes for Amazon Matching</a> . You may need to review your Magento <a href="#">attributes</a> and create or edit an attribute to match to this Amazon data.
Attribute That Contains Amazon ASIN	Only active when "Import Listing" is selected. Select the Magento attribute that matches to the Amazon attribute for the Amazon ASIN. This attribute should have been created during onboarding. See <a href="#">Creating Product Attributes for Amazon Matching</a> . You may need to review your Magento <a href="#">attributes</a> and create or edit an attribute to match to this Amazon data.

## Listing Price

Listing Price settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap **Listing Price** to expand the section.

The Listing Price setting defines which Magento pricing attribute to use as your price source, which is the base (default) price value for your Amazon listings. These defined settings will be used by your [pricing rules](#) to automatically adjust your Amazon listing price relative to the selected Magento Price Source.

You can configure your [pricing scope](#) as global or website. If your pricing scope is set to global, this means that there is a single price source for all your stores/websites. If your pricing scope is set to website, the price source will use fallback logic of website price (if available) followed by the default (global) price.

If your listing rules have more than one website selected in its settings, the order with which website price is used is determined by the website priority configured in your [listing rules](#). This allows you to define product pricing across your catalog. To see if you are using website price scope, see [Catalog Price Scope](#).

The options listed in Magento Price Source, Minimum Advertised Price (Map), and Strike Through Price (MSRP) include your configured Pricing attributes. Pricing attributes are Magento product attributes with the Catalog Input Type for Store Owner value set to Price. See [Attribute Input Types](#).

### To configure Listing Price settings:

1. Expand the **Listing Price** section.
2. For **Magento Price Source** (required), select a pricing attribute in the drop-down (default is "Price").

The option selected in this field determines the price source used for your Amazon listings. If you create pricing rules, the rules are applied to the value defined for the attribute selected here. You may select any configured pricing attribute, however, if the selected attribute is not filled in for a product, the price source for the product will default back to "Price" when pricing rules are applied to determine the published Amazon listing price.

3. For **Minimum Advertised Price (MAP)**, select a pricing attribute in the drop-down (default is no selection).

This field enables a minimum advertised price (MAP) for a product. When you define a pricing attribute and your listing price for a product falls below your determined minimum price (based on your pricing source and rules), this value becomes the MAP for the listing. This allows you to implement pricing rules while still controlling your minimum price for a product. To prevent a listing price from being too low, select a pricing attribute to use as your MAP. However, if the selected pricing field is not defined for a product, the MAP will not be used.

4. For **Strike Through Price (MSRP)**, select a pricing attribute in the drop down (default is no selection).

This field determines which pricing attribute is used as the manufacturer's suggested retail price (MSRP) for a product. If your listing price is less than the defined MSRP, your Amazon listing will display a strike-through of the MSRP price and display the lower listing price, along with the calculated "You Save" amount and percentage. However, if the selected pricing field is not defined for a product, the MSRP feature will not be calculated.

**Important:** This will only apply to listings that have won the **Buy Box** position. The Buy Box is awarded by Amazon to the seller who has the product listed usually at the best price, along with other factors such as FBA/Prime shipping offered, availability, and the seller's performance.

5. For **Apply Value Added Tax (VAT)** field, select an option (default is "Disabled").
  - **Disabled:** Select this option if you do not want to apply VAT to your listing price.
  - **Enabled:** Select this option if you want to apply VAT to your listing price. VAT is typically used as a sales tax in European countries and is added to your final listed price within Amazon. VAT does not apply to final price for listings that are used within an intelligent pricing rule, unless the price floor is hit.

6. For **VAT Percentage**, enter the value for your VAT rate (default is "0.00").

The value entered in this field will be used to calculate the VAT amount to be added to the listing price. If 10.2 is entered, a 10.20% VAT will be applied to your listing price. This field is disabled when the Apply Value Added Tax (VAT) field is set to "Disabled."

7. For **Currency Conversion**, select an option (default is "Disabled").

The options in this drop-down are dependent on your **Magento currency** settings. If options are not available, you may need to set up your currency settings.

### Listing Price

Control aspects of pricing across the Amazon marketplace

Magento Price Source \*  ?

Minimum Advertised Price (MAP)  ?

Strike Through Price (MSRP)  ?

Apply Value Added Tax (VAT)  ?

VAT Percentage  ?

Currency Conversion  ?

The current default currencies are as follows: Magento = USD, Amazon = USD.

Currency Conversion Rate  ?

*Listing Price*

## Field Descriptions

FIELD	DESCRIPTION
Magento Price Source	The default option is "Price." The option selected in this field determines the price source that will be used when creating your Amazon listings. Should you select another attribute such as "Amazon Price" or "Special Price," This price will be used on your Amazon listing. However, should "Amazon Price" or "Special Price" not be filled out, Price will always be the default value.
Minimum Advertised Price (MAP)	The Magento attribute for MAP pricing. Selecting the MAP option automatically sets your Amazon listing to the MAP price if the listing price is less than the MAP price.
Strike Through Price (MSRP)	The Magento attribute that represents the MSRP pricing. If your Amazon listing price is less than the MSRP, it will show a strike-through of the MSRP price and display the listing price.  Strike Through Price (MSRP) also calculates the "You Save" amount and percentage, but it only applies to listings that have won the Buy Box position.
Apply Value Added Tax (VAT)	Generally used in the European Union.  Select <b>Enabled</b> and then enter the VAT Percentage.

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<p>If the VAT percentage = 5, then a 5% VAT will be applied to the final listing price after all pricing rules have been applied. VAT tax will not apply to the final price for listings that are used within an intelligent pricing rule, unless the floor or ceiling is hit.</p>
Currency Conversion	<p>Allows your Magento storefront default currency to accurately convert to your default Amazon currency to publish your listing prices in the proper currency. The currency conversion will always be based on your Magento default currency.</p> <p>You can still view your default Magento and Amazon currencies when other currencies are available. If your default Magento currency matches your default Amazon currency, leave Currency Conversion disabled.</p> <p>However, let's say that our Magento default currency is CAD (Canadian Dollars) and our Amazon default currency is USD. We will need to enable Currency Conversion and choose the Conversion Rate CAD to USD. The options presented are based on the built-in Magento currency conversions. If you do not see the option you are looking for, you will need to <a href="#">set up the currency in Magento</a>.</p>

## (B2B) Business Price

(B2B) Business Price settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap **(B2B) Business Price** to expand the section.

Amazon Business is a marketplace exclusively open for Amazon registered business accounts, and only available in the United States, France, Germany, and the United Kingdom in 2019. If the marketplace allows B2B business pricing, it will be editable within your listing settings.

B2B Business Pricing allows merchants with business accounts to purchase from each other with the expected performance of the Amazon shopping experience. With B2B business pricing, businesses can offer tiered pricing based on the quantity purchased.

For your products to be listed on the Amazon Business (B2B) site, you must first enable business in your Amazon Seller Central account. For more information on the B2B feature, see [Amazon: B2B Central](#).

### To configure (B2B) Business Price settings:

1. Expand the **(B2B) Business Price** section.
2. For **Enable Business Pricing**, select an option (default is "Disabled").
  - **Disabled:** Select this option if you do not want to enable business to business sales. All other fields in this section are disabled when this option is selected.
  - **Enabled:** Select this option if you want to enable your business to business sales. When enabled, the business price is set equal to the list price after all pricing rules have been applied. The business price follows the website pricing scope, if enabled. A business price can not be less than \$1.
3. For **Enable Tiered Pricing**, select an option (default is "Disabled").
  - **Disabled:** Select this option if you want the same listing price for all order quantities. All Pricing Level fields in this section are disabled when this option is selected.
  - **Enabled:** Select this option if you want to enable pricing that adjusts based on order quantity. When enabled, the Pricing Level quantity and discount fields enable.
4. Complete the **Pricing Level** settings.

You can define up to five quantity/discount settings that set the tier pricing for your business listings. In each row, enter the quantity threshold value and the discount percent to apply. For example, if you enter 5 in the first field of the first row and 5 in the second field, when another business purchases a quantity of 5 or more, the price will apply a 5% discount.



**(B2B) Business Price**

Control aspects of business (B2B) pricing across the Amazon marketplace

**Enable Business Pricing**  ▼  
Enabling will make listings active in the Amazon business market to include optional tiered pricing.

**Enable Tiered Pricing \***  ▲  
Enabling allows the creation of tiered pricing based on quantity purchased.

**Pricing Level One (qty/discount)**

**Pricing Level Two (qty / discount)**

**Pricing Level Three (qty / discount)**

**Pricing Level Four (qty / discount)**

**Pricing Level Five (qty / discount)**

*Business Pricing (B2B)*

## Field Descriptions

FIELD	DESCRIPTION
Enable Business Pricing	<p>Options:</p> <ul style="list-style-type: none"> <li>• <b>Disabled:</b> Select this option if you do not want to enable business to business sales. All other fields in this section are disabled when this option is selected.</li> <li>• <b>Enabled:</b> Select this option if you want to enable your business to business sales. When enabled, the business price is set equal to the list price after all pricing rules have been applied. The business price follows the website pricing scope, if enabled. A business price can not be less than \$1.</li> </ul>
Enable Tiered Pricing	<p>(Required) Options:</p> <ul style="list-style-type: none"> <li>• <b>Disabled:</b> Select this option if you want the same listing price for all order quantities. All Pricing Level fields in this section are disabled when this option is selected.</li> <li>• <b>Enabled:</b> Select this option if you want to enable pricing that adjusts based on order quantity. When enabled, the Pricing Level quantity and discount fields enable.</li> </ul>

## Field Descriptions (cont.)

FIELD	DESCRIPTION
Pricing Level One-Five (qty/discount)	When Tiered Pricing is enabled, you can define up to five quantity/discount settings that set the tier pricing for your business listings. In each row, enter the quantity threshold value and the discount percent to apply. For example, if you enter 5 in the first field of the first row and 5 in the second field, when another business purchases a quantity of 5 or more, the price will apply a 5% discount.

## Stock/Quantity

Stock/Quantity settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap **Stock/Quantity** to expand the section.

The Stock/Quantity settings are used to sync the product quantity details from your Magento storefront to the quantity on your Amazon Seller Central account. This tool is very powerful and can be leveraged for additional advertising by displaying urgency to the buyer while keeping your inventory organized. For example, some merchants may have 150 items of a particular SKU in stock in their warehouse, and want to make sure that Amazon shoppers can purchase all of their inventory. Other merchants may wish to only list one item at a time to create a sense of scarcity to the end user. To do this, you would set the Maximum Listed Quantity to 1.

Quantity is a regional attribute, and based on the Amazon Marketplace option selected during [store integration](#). When a change is made to a product's quantity, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration). Your first Amazon store that is set up (with the oldest creation date) controls priority in the quantity settings.

For Magento 2.3.x users, Amazon Sales Channel supports the use of the Multi Source Inventory (MSI) extension without any additional setup. See [Managing Inventory](#).

### To configure Stock / Quantity settings:

1. Expand the **Stock / Quantity** section.
2. For **Out-of-Stock Threshold** (required), enter a numerical value for the lowest quantity of a product in order to keep the product eligible for its Amazon listing (default is "0").

This means that if your Magento product stock goes lower than this number, the respective Amazon listing will be ineligible for sales through Amazon.

3. For **Maximum Listed Quantity** (required), enter a numerical value for the quantity you wish to display in your Amazon listing.

This will list all your eligible Amazon listings at the entered value. As soon as an item is sold, the Amazon listing will continue to display this quantity. The displayed listing quantity available will always use this value, even when your actual product quantity is higher or lower. This setting is typically used when you do not manage product inventory.

For example, you may have a product with a quantity of 80 in your Magento catalog. With this Maximum Listed Quantity set to "10," the Amazon listing will always display a quantity available of 10 and will refresh each time a sale is made for the product.

- For **"Do Not Manage Stock" Quantity** (required), enter a value for your display quantity for your Amazon listings.

Amazon requires that you publish an available quantity. For Magento products that are set to not manage stock but you want to list them on Amazon, the listing will be published with available quantity of the value entered here.

**Stock / Quantity**

Control aspects of stock management across the Amazon marketplace

Out-of-Stock Threshold \*  ?

Maximum Listed Quantity \*  ?

"Do Not Manage Stock" Quantity \*  ?

*Stock/Quantity*

### Field Descriptions

FIELD	DESCRIPTION
Out-of-Stock Threshold	<p>Enter a numerical value for the lowest quantity of a product in order to keep the product eligible for its Amazon listing (default is "0").</p> <p>This means that if your Magento product stock goes lower than this number, the respective Amazon listing will be ineligible for sales through Amazon.</p>
Maximum Listed Quantity	<p>Enter a numerical value for the quantity you wish to display in your Amazon listing.</p> <p>This will list all your eligible Amazon listings at the value denoted. As soon as an item is sold, the Amazon listing will republish with the quantity entered here. This setting is typically used when you do not manage product inventory.</p> <p>For example, you enter the Maximum Listed Quantity value as "10." Your actual quantity for a product is 80. Because you have set this value at "10," the Amazon listing will display a quantity available of "10" and will refresh each time a sale is made for the product. The quantity available will always display with the value in this field, even when your quantity is lower.</p>
"Do Not Manage Stock" Quantity	<p>Enter a value for your display quantity for your Amazon listings.</p>

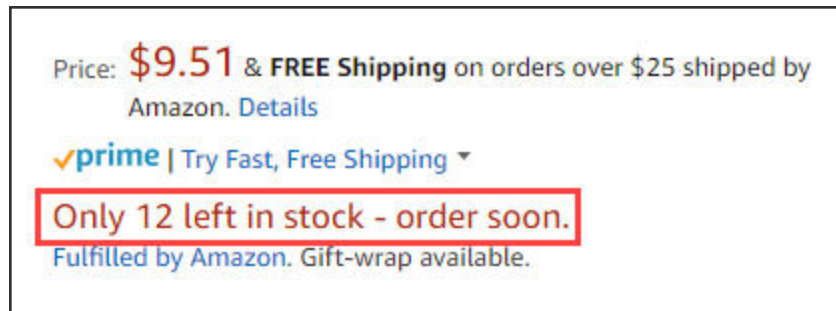
## Field Descriptions (cont.)

FIELD	DESCRIPTION
	Amazon requires that you publish an available quantity. For Magento products that are set to not manage stock but you want to list them on Amazon, the listing will be published with available quantity of the value entered here.

### Example: Maximum Listed Quantity

As soon as an item is sold, it will re-list it at this quantity.

For example, if we set the Maximum Listed Quantity = 12, but the product has Magento Quantity = 80, since our Maximum Listed Quantity = 12 this will be how our Amazon product will display:



Price: **\$9.51** & **FREE Shipping** on orders over \$25 shipped by Amazon. [Details](#)

✓prime | Try Fast, Free Shipping ▾

**Only 12 left in stock - order soon.**

Fulfilled by Amazon. Gift-wrap available.

If you set your Maximum Listed Quantity to 1, all your eligible products will be listed with a quantity of 1. As soon as an item is sold, the system will look to your Magento product and re-list the item if additional stock exists. This option might be chosen if your products are typically ordered at a quantity of 1. This will also increase urgency for the shopper when viewing your Amazon listing.



List Price: \$14.78

Price: **\$11.35** & **FREE Shipping** on orders over \$25 shipped by Amazon. [Details](#)

You Save: **\$3.43 (23%)**

Get \$10 off instantly: Pay \$1.35 upon approval for the Amazon Prime Store Card.

✓prime | Try Fast, Free Shipping ▾

**Only 1 left in stock - order soon.**

Fulfilled by Amazon. Gift-wrap available.

## Fulfilled By

Fulfilled By settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap **Fulfilled By** to expand the section.

"Fulfilled by" settings define who fulfills (or ships) orders. If all of your orders are fulfilled using one method, select between merchant (you) or Amazon. If you plan on fulfilling orders from your locations and using Amazon, we recommend using the third option and configuring a Magento product attribute.

- **Fulfilled by Merchant:** Select this option when you, the merchant, will fulfill all orders. When an order is placed, inventory will be deducted from your Magento catalog.
- **Fulfilled by Amazon:** Select this option if Amazon will fulfill all orders. When selected, product inventory is not deducted from your Magento catalog when an order is placed. Inventory stock for Amazon fulfilled orders is stored and deducted from their warehouses. Before assigning this option, you must verify in your Amazon Seller Central account that your products are eligible for FBA fulfillment. FBA inventory is directly managed through your Amazon Seller Central Account. With this fulfillment method, Amazon Sales Channel does not share quantity updates between Magento and Amazon. Therefore, not all of the marketing tools described in the Quantity Settings will be available to you in Amazon Sales Channel.
- **Assign Fulfilled By Using Magento Product Attribute:** If your products may be fulfilled by you and Amazon, you may want to create a Magento product attribute with values for Fulfilled By Merchant and Fulfilled by Amazon. Setting this value per product indicates who fulfills the orders.

The fulfillment method is a regional attribute, and based on the Amazon Marketplace option selected during [store integration](#). When a change is made, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration).

### To configure Stock / Quantity settings:

1. Expand **Fulfilled By**.
2. For the **Product Fulfilled By**, select who fulfills (ships) the order:

- Fulfilled by Merchant: Merchant fulfills order.
- Fulfilled by Amazon: Amazon warehouse fulfills order.
- Assign Fulfilled By Using Magento Product Attribute: A Magento attribute indicates who fulfills the order per product. If selected, then select the Magento attribute for **Fulfilled by Attribute**.

**Fulfilled By**

Control whether Amazon listings are fulfilled by merchant or Amazon

Product Fulfilled By  ?

Fulfilled By Attribute \*  ?

*Fulfilled By*

## Field Descriptions

FIELD	DESCRIPTION
Product Fulfilled By	<p>Options:</p> <ul style="list-style-type: none"> <li>• <b>Fulfilled by Merchant:</b> (FBM) Select this if you fulfill the orders. When an order is placed, inventory will be deducted from your Magento catalog. When a new product is created, the fulfillment method of Merchant Fulfilled will be assigned.</li> <li>• <b>Fulfilled by Amazon:</b> (FBA) Select this if Amazon fulfills the orders. With this fulfillment method, product inventory will not be deducted from your Magento catalog when an order is placed. When a new product is created it will be created with Fulfilled by Amazon (FBA) as the fulfillment type. You will need to ensure that your products are eligible for FBA fulfillment within your Amazon Seller Central account. FBA inventory is also directly managed through your Amazon Seller Central account. With this fulfillment method quantity updates are not pushed out relative to your Magento catalog, so you will be unable to use some of the marketing tools described in the Quantity Settings.</li> </ul>

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<ul style="list-style-type: none"><li>• <b>Assign Fulfilled By Using Magento Product Attribute:</b> Select this if you have an existing Magento attribute that determines if it is fulfilled by the merchant or fulfilled by Amazon. When selected, the <b>Fulfilled by Attribute</b> field enables.</li></ul>
Fulfilled By Attribute	<p>Select the Magento attribute used to determine the fulfillment method.</p> <p>For example, if the attribute is Fulfilled By and you select the respective attribute value to denote if it is Fulfilled By Merchant or Fulfilled By Amazon (FBA), when a new product is created it will be created with FBA as the fulfillment type. As a merchant, you will need to ensure that your products are eligible for FBA fulfillment within your Amazon Seller Central account. FBA inventory is also directly managed through your Amazon Seller Account.</p> <p>Options in this list depend on the attributes you set up for your Amazon products.</p>



# Catalog Search

Catalog Search settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap **Catalog Search** to expand the section.

Catalog Search settings enable you to set matching search parameters that help to map eligible Magento products with Amazon listings. Once mapped, Amazon activates actions related to pricing, quantity, overrides, and order and product synchronization.

Defining these values increases the potential for exact matches, minimizing the need to manually match product listings later. Adding the attributes as part of your onboarding [Pre-Setup Tasks](#), Amazon Sales Channel has a higher potential for automatically matching your products during onboarding and syncs product data between Amazon and Magento after onboarding.

If you only create the Amazon ASIN attribute (without adding ASIN values per product), your Magento products may not automatically your Amazon listings will automatically. You can manually match your products through Store Review. However, manual matching does not create the data elements needed to share and sync your product data.

**Important:** If you manually matched a product and you need to update an ASIN, UPC, or other data element for the product, you would have to update the data in both places, in your Magento catalog and in your Amazon listing in your Amazon Seller Central account.

## To configure Search Catalog settings:

We recommend mapping these attributes and values if available. Completing this mapping is not required, but is beneficial for initial product matching and required for proper catalog syncing between Amazon and Magento.

1. Expand the **Catalog Search** section.
2. In the **ASIN** field, select the product attribute you created for the Amazon ASIN value.

An ASIN (Amazon Standard Identification Numbers) is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an item's ASIN on the product detail page on Amazon, along with further details relating to the item.

3. In the **EAN** field, select the product attribute you created for the Amazon EAN value.

The European Article Number (EAN) is a barcode standard, a 12 or 13-digit product identification code. Each EAN uniquely identifies the product, manufacturer, and its attributes; typically, the EAN is printed on a product label or packaging as a bar code. Amazon requires EAN codes to improve quality of search results and the quality of the catalog. You can obtain EANs from the manufacturer.

4. In the **GCID** field, select the product attribute you created for the Amazon GCIN value.

The Global Catalog Identifier (GCID) is an ID for products that do not have a UPC code or ISBN. Amazon's Brand Registry allows you to register as a brand owner and create a unique ID for products.

5. In the **ISBN** field, select the product attribute you created for the Amazon ISBN value.

The International Standard Book Number (ISBN) is a unique commercial book identifier barcode. Each ISBN code uniquely identifies a book. ISBN have either 10 or 13 digits. All ISBN assigned after Jan 1, 2007 have 13 digits.

6. In the **UPC** field, select the product attribute you created for the Amazon UPC value.

The Universal Product Code (UPC) is a 12-digit bar code used extensively for retail packaging in United States.

7. In the **General Search** field, select the product attribute you want to use for a general search match.

This is an attribute that you can select to match Magento products to the appropriate Amazon listing. General search uses keyword searches from your catalog. As such, it is recommended to use a Magento attribute that carries relevant keywords, such as the product SKU or product name. General search may return many possible matches, and in such cases, you can select the appropriate Amazon listing from the possible matches. A common selection for this field is "Product Name."

**Catalog Search**

Provide data sources for attempting to match catalog products to their respective Amazon listing

ASIN	Amazon ASIN	?
EAN	-- Select Option --	?
GCID	-- Select Option --	?
ISBN	-- Select Option --	?
UPC	-- Select Option --	?
General Search	Product Name	?

*Catalog Search*

## Field Descriptions

FIELD	DESCRIPTION
ASIN	A unique block of 10 letters and/or numbers that identify items.

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
EAN (European Article Number)	A 12- or 13-digit product identification code. The European Article Number (EAN) is a barcode standard, a 12 or 13-digit product identification code. Each EAN uniquely identifies the product, manufacturer, and its attributes; typically, the EAN is printed on a product label or packaging as a bar code. Amazon requires EAN codes to improve quality of search results and the quality of the catalog. You can obtain EANs from the manufacturer.
GCID (Global Catalog Identifier)	The Global Catalog Identifier (GCID) is an ID for products that do not have a UPC code or ISBN. Amazon's Brand Registry allows you to register as a brand owner and create a unique ID for products that may not have a UPC or ISBN.
ISBN (International Standard Book Number)	A 10- or 13-digit unique commercial book identifier barcode. The International Standard Book Number (ISBN) is a unique commercial book identifier barcode. Each ISBN code uniquely identifies a book. ISBN have either 10 or 13 digits. All ISBN assigned after Jan 1, 2007 have 13 digits.
UPC (Universal Product Code)	A 12-digit bar code. The Universal Product Code (UPC) is a 12-digit bar code used extensively for retail packaging in United States.
General Search	Select an attribute from the drop-down. This is an attribute that you can select to match Magento products to the appropriate Amazon listing. General search uses keyword searches from your catalog. As such, it is recommended to use a Magento attribute that carries relevant keywords, such as the product SKU or product name. General search may return many possible matches, and in such cases, you can select the appropriate Amazon listing from the possible matches. A common selection for this field is "Product Name."

## Product Listing Condition

Product Listing Condition settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Settings**. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap **Product Listing Condition** to expand the section.

Amazon requires a product listing to have a defined condition. If all your products are new, you can select one of the Amazon condition options in the drop down list to represent all of your products as your global condition value. Standard Amazon conditions include:

- New
- Refurbished
- Used; Like New
- Used; Very Good
- Used; Good
- Used; Acceptable
- Collectible; Like New
- Collectible; Very Good
- Collectible; Good
- Collectible; Acceptable

However, if your catalog contains products in different conditions (New, Used, Refurbished, etc.), you must select the **Assign Condition Using Product Attribute** option. This setting allows you to map your Magento condition attribute and values to your Amazon listing's conditions.


During [Pre-Setup Tasks](#), it was recommended that you create a Magento product attribute for a product's condition. If you offer products in various conditions and you have not created a condition attribute, see [Onboarding: Create a product attribute in Magento](#). Once the condition attribute is created, you can assign a condition value to each of your products in your Magento catalog.

### To configure Product Listing Condition settings:













1. Expand the **Product Listing Condition** section.
2. For **Listing Product Condition**, select an option.

- **Standard Amazon condition value:** Select one of the standard Amazon conditions to use as your global condition value for all of your Magento products.
  - **Assign Condition Using Product Attribute:** Select this option if your Magento catalog contains products in various conditions. When this option is selected, the **Condition Attribute** field enables and is required.
3. For **Condition Attribute**, select the Magento attribute to map values to each Amazon condition attribute. You may have **created the attribute** during pre-setup tasks. When selected, a field for each of the standard Amazon conditions displays. Map Magento attribute values to each Amazon condition.
- If your products fall into only one condition, you can map to that single Amazon condition, leaving the others blank.
  - If you have products that fall in the Used or Collectible category but you do not distinguish further, you can map to a single Used or Collectible Amazon category and leave the other similar options blank. All your Used or Collectible conditions will map to the single Amazon Used or Collectible category by default.
  - You can also enter additional text to describe your conditions.

For example, you have a single Used condition for your products. When mapping, you will choose whether you want to map to the Amazon condition Used; Like New; Used, Very Good; Used; Good; or Used; Acceptable. Only complete the field for the Amazon condition option you want, leaving the other Used options set to "--Select Option--." You'll see in the screen shot example, all of your Magento products in Used condition map to the Amazon Used; Very Good condition.

**Product Listing Condition** 

Control what condition to list your products

<b>Listing Product Condition</b>	<input type="text" value="Assign Condition Using Product Attribute"/>	
<b>Condition Attribute *</b>	<input type="text" value="Amazon Condition"/>	
<b>New Condition</b>	<input type="text" value="New"/>	
<b>Refurbished Condition</b>	<input type="text" value="Refurbished"/>	
	<input type="text" value="Optional text to describe refurbished condition (1,000 characters maximum)."/>	
<b>Used; Like New Condition</b>	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe used; like new condition (1,000 characters maximum)."/>	
<b>Used; Very Good Condition</b>	<input type="text" value="Used"/>	
	<input type="text" value="Optional text to describe used; very good condition (1,000 characters maximum)."/>	
<b>Used; Good Condition</b>	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe your used; good condition (1,000 characters maximum)."/>	
<b>Used; Acceptable Condition</b>	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe used; acceptable condition (1,000 characters maximum)."/>	
<b>Collectible; Like New Condition</b>	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe collectible; like new condition (1,000 characters maximum)."/>	
<b>Collectible; Very Good Condition</b>	<input type="text" value="Collectible"/>	
	<input type="text" value="Optional text to describe collectible; very good condition (1,000 characters maximum)."/>	
<b>Collectible; Good Condition</b>	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe collectible; good condition (1,000 characters maximum)."/>	
<b>Collectible; Acceptable Condition</b>	<input type="text" value="-- Select Option --"/>	
	<input type="text" value="Optional text to describe collectible; acceptable condition."/>	

*Product Listing Condition*

## Field Descriptions

FIELD	DESCRIPTION
Listing Product Condition	<p>The condition of your product listings.</p> <ul style="list-style-type: none"><li>• <b>Standard Amazon condition value:</b> Select one of the standard Amazon conditions to use as your global condition value for all of your Magento products.</li><li>• <b>Assign Condition Using Product Attribute:</b> Select this option if your Magento catalog contains products in various conditions. When this option is selected, the <b>Condition Attribute</b> field enables and is required.</li></ul> <p>If most of your products are the same condition, select that condition for all of your products. Then you can use a <b>condition override</b> for the products that are not that condition type.</p> <p>A required attribute for products to be listed with Amazon.</p>
Condition Attribute	<p>The attribute that defines the condition for your products. Select the product attribute you created for the Amazon condition attribute. In our Pre-Setup Tasks example, we recommended naming it "Amazon Condition." When selected, a field for each of the standard Amazon conditions displays for mapping to the condition values you added when you created your condition attribute.</p>
Defined Seller Condition Fields Notes	<p>Additional information about the condition of the product. There is a 1,000-character limit. Seller notes are not allowed for products that are listed in New condition.</p> <p>For each of the standard Amazon conditions, select the corresponding option to map in the drop-down. The options in the drop-down are the condition labels you added when you created your Amazon condition attribute.</p> <p>If you have products that fall in the Used or Collectible category but you don't distinguish further, you can map to a single Used or Collectible Amazon category and leave the other similar options blank. All your Used or Collectible conditions will map to the single Amazon Used or Collectible category by default.</p>

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<p>For example, you have a single Used condition for your products. When mapping, you will choose whether you want to map to the Amazon condition Used; Like New: Used, Very Good: Used; Good: or Used; Acceptable. Only complete the field for the Amazon condition option you want, leaving the other Used options set to "--Select Option--." You'll see in the screen shot example, all of your Magento products in Used condition map to the Amazon Used; Very Good condition.</p> <p>You can also enter additional text to describe your conditions.</p>



# Listing Rules

If you are managing a store that is in "In Setup" status, see [Onboarding: Listing Rules](#).

Listing rules are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing rules for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Listing Rules**.

Listing Rules define the rules to determine which products Amazon Sales Channel will publish to your Amazon Marketplace. These rules provide many options to create simple to complex rules to include or exclude products as listings. Each rule consists of conditions that set the requirements for product listing eligibility.

Your listing rules are continually synchronized with your Magento catalog. When you add new Magento products that meet eligibility requirements set by your listing rules, the products will automatically process for listing on Amazon.

- If you want all of your products to be published to an Amazon listing, do not define any conditions for your listing rules.
- If you want to limit which of your catalog products that will be published to an Amazon listing, you will define your listing rule conditions in this step of onboarding. Defining the conditions for your Amazon listing rules follow the same logic and process as defining the conditions for [Cart Price Rules](#) in Magento.
- If your listing rules exclude a product, the eligibility status for that product changes to Ineligible. Ineligible products will not be published to Amazon.
- If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. Amazon listings can be manually removed when [managing listings](#).

Changes to quantity and eligibility status impact all listings that share the Amazon Seller SKU in marketplaces which exist for stores selling in the same region (as defined in the Amazon Marketplace field during [Store Integration](#)) will also be impacted. However, a change to a shared Amazon Seller SKU in one region will not affect the product's Amazon listings in a different region (as defined during Store Integration).

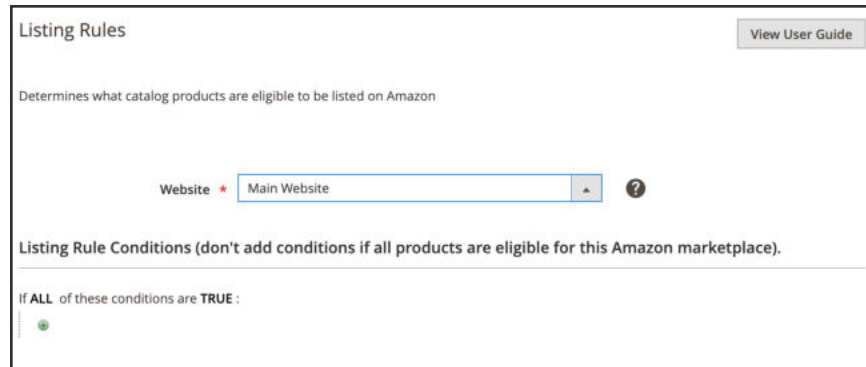
## To configure Listing Rules settings:

1. Tap **Listing Rules**.
2. For **Website**, select an option.

The options in this drop-down are dependent on the [websites](#) you have set up in your Magento configuration. Select the website to represent which website to have eligible products listed on Amazon. Only one website can be selected, as each website requires a unique Amazon store created in Amazon Sales Channel.

3. Define your desired conditions for the eligibility of products to be listed on Amazon.

See [Example: Define a Condition](#).



*Listing Rules*

## Field Descriptions

FIELD	DESCRIPTION
Websites	The options in this drop-down are dependent on the <a href="#">websites</a> you have set up in your Magento configuration. Select the website to represent which website to have eligible products listed on Amazon. Only one website can be selected, as each website requires a unique Amazon store created in Amazon Sales Channel.
Conditions	Used to define the Magento attributes for product eligibility within your Amazon region. See <a href="#">Example: Define a Condition</a> .

## Conditions Workspace

Any areas in the conditions that are bold can be tapped to see the various options.

- Don't add conditions if all products within the selected website(s) are eligible.
- There is a complex set of back-end processes to communicate with Amazon's systems directly. Based on the number of items you are attempting to list, and how busy Amazon's systems might be (for example, Black Friday can be a slow time to list new products), it may take time for your items to be listed on Amazon.

For more information about conditions, see [Describe the Conditions](#).

# Listing Rule Preview

If you are managing a store that is in "In Setup" status, see [Onboarding: Listing Preview](#).

When you are modifying your condition definitions for your listing rules for an Active store, you can tap **Preview Changes** to apply your rules changes and view how your listings are impacted. It is recommended to verify your listings in this listing preview feature before saving your changes to your listing rules.

Your current Amazon listings are compared against your rules, based on the conditions you defined. You can then review which products will move to an ineligible status based on your current Amazon Seller Central account, which products will move from an ineligible state back to an eligible state, and which products will be New Amazon Listings and added to your Amazon listing from your eligible Magento catalog.

Listing Preview allows you to preview your potential Amazon listings and make any necessary adjustments to your listing rules. If you need to adjust your listing rules, click **Listing Rules** in the progress bar to return to the [listing rules](#) step.

Your potential Amazon listings will populate on the Listing Preview screen in one of three tabs:

- **Ineligible Listings:** Products listed on this tab are not eligible for Amazon listing based on your current listing rule settings.

Ineligible products will not be published to Amazon. If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. To manually remove a listing, see [Ending an Amazon Listing](#).

Products that are not eligible by Amazon requirements are not listed here. Those products are listed on the [Inactive Listings tab](#).

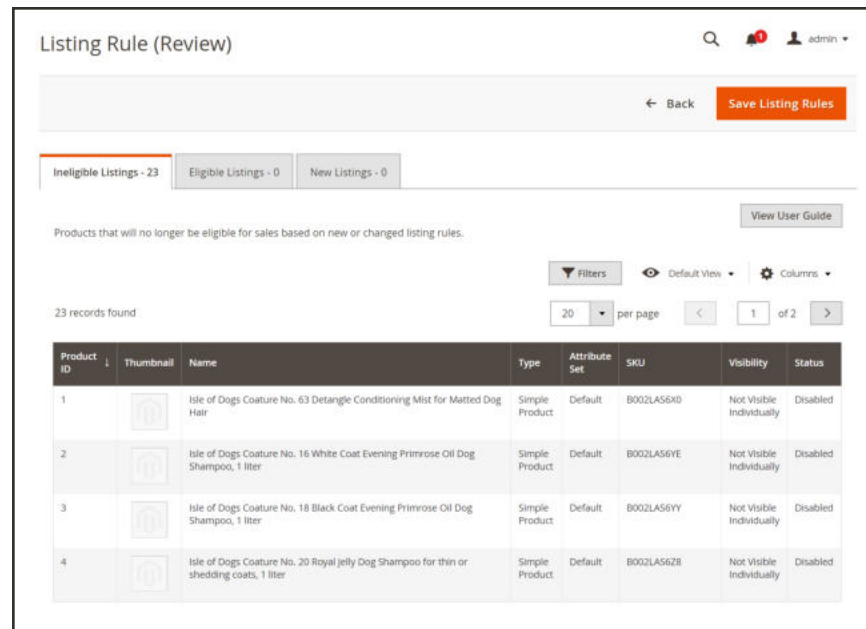
- **Eligible Listings:** Products listed on this tab are eligible for Amazon listing based on your current listing rule setup and are eligible by Amazon requirements. This tab includes your existing Amazon listings that will import (if you have the **Import Third Party Listings** field set to "Import Listing" in the Listing Settings step).
- **New Listings:** Products listed on this tab include your Magento catalog products that are newly eligible for Amazon listing based on your current listing rule setup and will create new Amazon listings.

## To view your listing preview:

Access your listing rules for an active store.

1. View your [listing rules](#).
2. Modify your [Listing Rule Conditions](#).
3. Tap **Preview Changes** in the header bar.

- Review and confirm your listings in the Ineligible Listings, Eligible Listings, and New Listings tabs.
- If your listings match your expectations, tap **Save Listing Rules**. If your listings do not display as expected, tap **Back** and continue to modify your conditions until your listings match your expectations.



*Listing Preview*

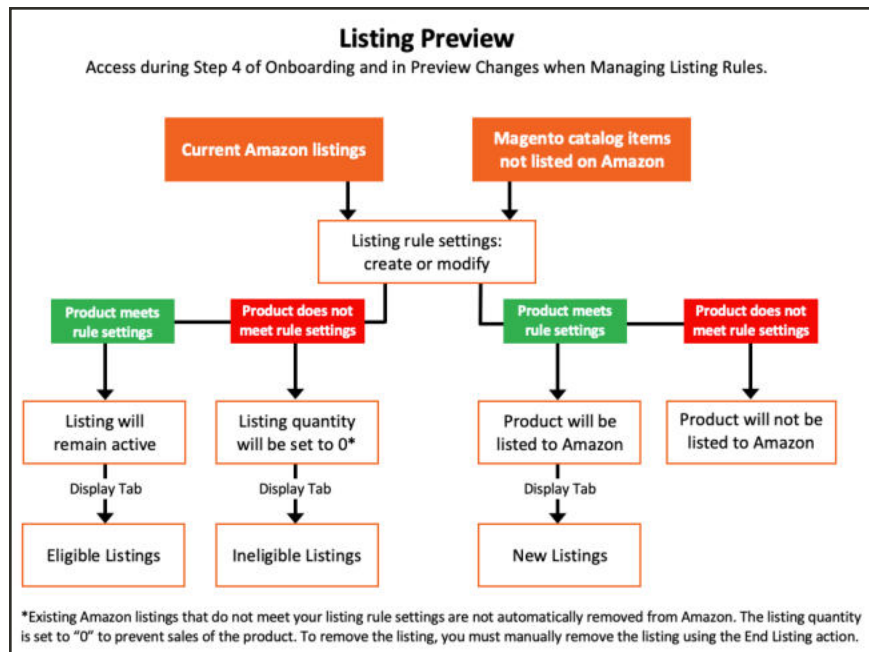
## Field Descriptions

FIELD	DESCRIPTION
Product ID	The unique, sequential number that is assigned to a Magento catalog product when it is added.
Thumbnail	Displays a thumbnail of the main product image.
Name	The name of the product, managed in the Magento <b>Products Grid</b> .
Type	The type of product, managed in the Magento <b>Products Grid</b> .
Attribute Set	The name of the attribute set used as a template for the product, managed in the Magento <b>Products Grid</b> .
SKU	The unique Stock Keeping Unit that is assigned to the product, managed in the Magento <b>Products Grid</b> .

## Field Descriptions (cont.)

FIELD	DESCRIPTION
Visibility	<p>Indicates where the product is visible, managed in the Magento <b>Products Grid</b>. Options:</p> <ul style="list-style-type: none"> <li>• Not visible individually</li> <li>• Catalog</li> <li>• Search</li> <li>• Catalog, Search</li> </ul>
Status	<p>Indicates the current status of the product, managed in the Magento <b>Products Grid</b>. Options:</p> <ul style="list-style-type: none"> <li>• Enabled</li> <li>• Disabled</li> </ul>

## Listing Preview Workflow



*Listing Preview Workflow*

# Managing Amazon Pricing

Amazon Sales Channel gives you the ability to set pricing rules, which allow you to set your Amazon listing price different than your Price Source. Additionally, you can stack multiple rules and even use the intelligent pricing to adjust your Amazon listing price based on competitors' Buy Box price or the lowest competitor price.

There are two types of pricing rules:

- **Standard Pricing Rule**
- **Intelligent Repricing Rule**

This feature allows you to manipulate your Amazon prices in a way that is very similar to Magento's **Catalog Price Rules**. You can create complex rules that allow you to change prices for specific products, products inside of specific categories, or even with specific attributes.

You can add pricing rules for your Amazon listings. Price rules can be used to automatically adjust your listing prices, based on a set of defined conditions. Price rules are triggered and calculate your adjusted price before your product is listed on Amazon.

The price source for your Amazon listings is defined in the **Magento Price Source** field in your **Listing Price** settings. Any adjustment calculations defined in the pricing rule use price source as the starting value.

Amazon Sales Channel gives you the ability to set pricing rules, these pricing rules allow you to set your Amazon Listing price different than your Price Source. Additionally, you can stack multiple rules that will work together to adjust your price.

A pricing/repricing rule requires three sets of information during its setup:

- **Pricing Rule General Settings**: Defines the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.
- **Pricing Rule Conditions**: Determine which products will be eligible for the price rule.
- **Pricing Rule Actions**: Define the adjustment calculations that will be applied to the price source to determine the listing price.

You can create **standard pricing rules** that will automatically adjust your Amazon listing price relative to the selected Magento Price Source. This feature allows you to manipulate your Amazon prices in a way that is very similar to Magento's **Catalog Price Rules**. You can create complex rules that automatically change prices for specific products, products inside of specific categories, or products with specific attributes. You can complete traditional settings and reprice your products to increase or decrease based on a fixed amount or a percentage.

Another powerful tool is the **Intelligent Repricing** feature that will adjust your Amazon listing price based on competitor **Buy Box Price** or **Lowest Competitor Price**. Similar to Magento's **Catalog Price Rules**, this advanced feature allows you to manipulate your Amazon prices by creating complex rules that allow you define the scope for a price change for specific products, products inside of specific categories, or even with specific product attributes.

Using intelligent repricing you can adjust your products listing prices on Amazon, based on competitor's pricing. Amazon Sales Channel has built in safeguards for you to set to protect margins or avoid matching the prices of a merchant with low feedback. Using intelligent repricing rules, Amazon listing prices can be automatically manipulated as a fixed or percentage amount (up or down) or even synchronized to the Buy Box or Lowest Price on a per item basis. Rules can even be stacked to provide unlimited flexibility.

Pricing rules determine if your product is listed on Amazon using your defined Price Source or if the price is automatically adjusted before listing on Amazon, based on defined conditions for the rule.

You can control important aspects of rules, such as active/inactive status, website eligibility, optional date ranges, and optional priority levels (used for rule stacking).

For example, you can define and set the conditions for a price rule that, when the conditions are met, automatically adjust your listing price before it is sent to Amazon.

Another pricing option is a price override, which is set at the individual listing level. A price override can be set, and an override ignores/takes priority over all other defaults, settings, and rules. An override can be set for price, handling time, condition, and seller notes (with a few exceptions). See [Overrides](#).

Name	Rule Type	Is Active	Priority	Stop Further Rules Processing	From Date	To Date	Action
Standard Price +10%	Standard Rule	Active	1	No			Select
Buy Box Pricing	Intelligent Rule	Active	99	No			Select

*Pricing Rules*

## Default Columns

COLUMN	DESCRIPTION
Name	The name of the pricing rule, as set in <a href="#">Pricing Rule General Settings</a> .
Rule Type	The rule type, as set in <a href="#">Pricing Rule Actions</a> (either Standard price rule or Intelligent repricing rule).
Is Active	Whether the rule is currently active, as set in <a href="#">Pricing Rule General Settings</a> .

## Default Columns (cont.)

COLUMN	DESCRIPTION
Priority	The priority over other pricing conditions, as set in <a href="#">Pricing Rule General Settings</a> .
Stop Further Rules Processing	Whether any further price rules will be processed on products eligible for this rule, as set in <a href="#">Pricing Rule General Settings</a> .
From Date	The beginning of the time period in which the rule is active.
To Date	The end of the time period in which the rule is active.
Action	Lists all actions that can be applied to a specific listing. To apply an action, in the Action column, tap the <b>Select</b> drop-down. Options: Edit Price Rule Delete Price Rule

## Add Pricing Rules

Pricing rules are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the Pricing rules for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Pricing Rules**.

A standard price rule action allows you to increase or decrease an Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or price source).

### To add a standard pricing rule:

1. Select a store from [Amazon Stores](#) on the Amazon Sales Channel Home.
2. On the [store dashboard](#), under **I Want To...**, tap **Pricing Rules**.
3. To add a rule, tap **Add New Pricing Rule**.
4. Complete the [General Settings](#) for the rule.
5. Complete the [Price Rule Conditions](#) for the rule.
6. Complete the [Price Rule Actions](#) for the rule.
7. When complete, tap **Save Pricing Rule**.

An intelligent repricing rule uses Amazon competitors' pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.



### To add an intelligent repricing rule:

1. Select a store from **Amazon Stores** on the Amazon Sales Channel Home.
2. On the **store dashboard**, under **I Want To...**, tap **Pricing Rules**.
3. To add a rule, tap **Add New Pricing Rule**.
4. Complete the **General Settings** for the rule.
5. Complete the **Price Rule Conditions** for the rule.
6. Complete the **Price Rule Actions** for the rule.
  - a. **Select Rule Type**
    1. **Competitor Conditional Variances**
    2. **Price Adjustment**
    3. **Floor Price**
    4. **Optional Ceiling Price**
7. When complete, tap **Save Pricing Rule**

## Pricing Rule General Settings

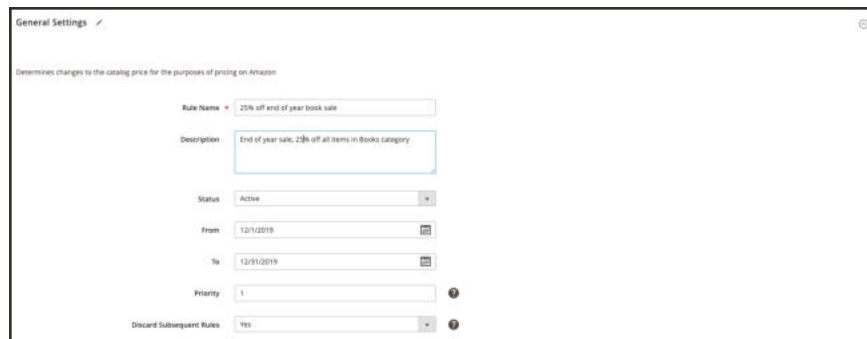
If you are managing a store that is in "In Setup" status, see [Onboarding: Price Rule General Settings](#).

Define the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.

### To complete the Price Rule General Settings section:

1. For **Rule Name** (required), enter the name for the rule.  
  
This is for your internal identification purposes only. The more descriptive the rule name, the better.
2. For **Description**, enter a detailed description of your rule.  
  
This could include information on the products that qualify, the active dates, the formula for calculating your adjusted price, or any other information you'd find useful if you ever needed to modify the rule.
3. For **Status**, select an option:
  - **Active:** Select this option if you want the pricing rule to apply to your eligible products and adjust your listing pricing before publishing to Amazon.
  - **Inactive:** Select this option if you do not want the pricing rule to apply to your eligible products. This option will most likely be used when modifying a pricing rule or turning it off after a limited promotion.
4. For **From** and **To**, enter a beginning and ending date for the pricing rule. You can also tap the calendar icon to select a date from the dynamic calendar. This automatic start and stop option is beneficial when setting up limited-time or seasonal promotions with definite begin and end dates.
5. For **Priority**, enter a numerical value for the rule's priority. Priority value equal to 1 is the highest priority. When you have multiple active pricing rules, you can use priority to determine which rule is applied first. This field is required to use the Discard Subsequent Rules feature.
6. For **Discard Subsequent Rules**, select an option.
  - **Yes:** Select this option if you do not want any other pricing rules that may apply to a product to be applied. Discarding subsequent rules means that, in the event that multiple pricing rules apply to the same product, only the pricing rule with the highest defined priority will be applied to a qualifying product. This prevents multiple pricing rules from stacking and providing unintended additional discounts
  - **No:** Select this option if you want to allow multiple pricing rules to apply to the same product. This could result in stacking and providing multiple discounts applied to your listing price.

To discard subsequent rules, a pricing rule must use priorities which are set in the **Priority** field.



The screenshot shows the 'General Settings' form for a pricing rule. The form is titled 'General Settings' and has a subtitle 'Determines changes to the catalog price for the purposes of pricing on Amazon'. The fields are: Rule Name (25% off end of year book sale), Description (End of year sale, 25% off all items in Books category), Status (Active), From (12/1/2019), To (12/31/2019), Priority (1), and Discard Subsequent Rules (Yes).

*Pricing Rule General Settings*

## Field Descriptions

FIELD	DESCRIPTION
Rule Name	Enter a name for the rule, used for internal identification purposes. The more descriptive the rule name, the better (for example, "25% off end of year book sale.")
Description	Enter a detailed description to explain the rule (also used for internal purposes). For example, "End of year sale, 25% off all items in the Books Category."
Status	Options: <ul style="list-style-type: none"><li>• <b>Inactive</b> - The pricing rule will not apply to your eligible products. This option will most likely be used when modifying a pricing rule or turning it off after a limited promotion.</li><li>• <b>Active</b> - The pricing rule will apply to your eligible products and adjust your listing pricing before publishing to Amazon.</li></ul>
From	Optional. Enter the start date when the pricing rule will begin. For example, if you want to have a sale during the last month of the year, you would select December 1st so that the pricing rule would automatically apply to your Amazon listings starting December 1st.
To	Optional. Enter the end date when the pricing rule ends. Continuing the previous example, since we only want our sale during the last month of the year, you would set the To date as December 31st, so the pricing rule will expire on December 31st.

## Field Descriptions (cont.)

FIELD	DESCRIPTION
Priority	<p>Optional. Enter a priority value to assign a priority to your pricing rule. A priority value equal to 1 is the highest priority. When you have multiple pricing rules set up, you can use priority to determine which rule is applied first. This field is required to use the Discard Subsequent Rules feature.</p>
Discard Subsequent Rules	<p>The ability to discard subsequent rules is a great feature inside of pricing rules that prevents multiple pricing rules from stacking and providing unintended additional discounts. To discard subsequent rules, a pricing rule must have a priority value defined in the Priority field. Options:</p> <ul style="list-style-type: none"><li>• <b>Yes:</b> Select this option if you do not want any other pricing rules that may apply to a product to be applied. Discarding subsequent rules means that, in the event that multiple pricing rules apply to the same product, only the pricing rule with the highest defined priority will be applied to a qualifying product. This prevents multiple pricing rules from stacking and providing unintended additional discounts</li><li>• <b>No:</b> Select this option if you want to allow multiple pricing rules to apply to the same product. This could result in stacking and providing multiple discounts applied to your listing price.</li></ul>

## Price Rule Conditions

If you are managing a store that is in "In Setup" status, see [Onboarding: Price Rule Conditions](#).

Conditions determine which products will be eligible for the price rule. Defining the conditions for your Amazon pricing rules follow the same logic and process as defining the conditions for [Cart Price Rules](#) in Magento. If your price rule applies to all products in your Magento catalog, then leave this section blank.

Any areas in the conditions that are bold can be tapped to see the various options.

### Example: To build a price rule condition

This process can be simple or detailed, depending on your catalog setup. You can set up your conditions so that when "ALL" or "ANY" of the define conditions are either "TRUE" or "FALSE" for a product, then the product is eligible for the pricing rule to be applied.

Conditions are based on existing product attribute values. To apply the rule to all products, leave the conditions section blank.

If you want to define a condition based on a specific product attribute, the **Use for Promo Rule Conditions** field for the attribute must be set to "Yes." The field is located on the [Storefront Properties](#) screen for the attribute.



*Condition - Line 1*

The condition in this example will define a rule that will apply a 25% discount to all products that are defined in the "Books" category.

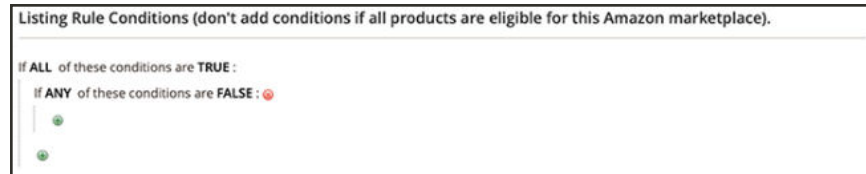
The rule statement has two bold links, which when clicked, display the options for that part of the statement. If you save the condition without making changing a bold option, the rule applies to all your products.

- Click the **ALL** link, and chose either "ALL" or "ANY."
- Click the **TRUE** link, and choose either "TRUE" or "FALSE."
- To apply the rule to all products, leave the condition unchanged.

You can create different conditions by changing the combination of these values. For this example, the following condition is used:

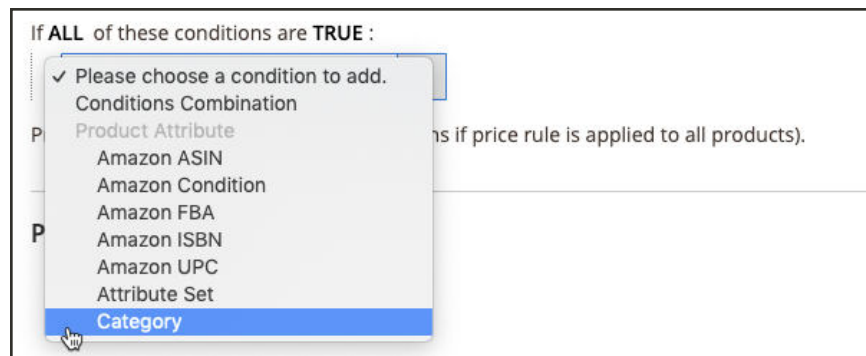
If ALL of these conditions are TRUE:

1. Click the **Add** (+) button at the beginning of the condition line to display available attributes on which the condition function. Select an attribute on which to base the condition, such as a conditions combination or a product attribute.
  - **Conditions Combination:** Selecting this option allows you to create an additional set of "All/Any" and "True/False" conditions inside the existing set.



*Conditions Combination*

- **Product Attribute:** The product attributes in this drop down is dependent on the setup of the attribute. For an attribute to display in the list, it must be configured to be used in promo rule conditions. See the Use for Promo Rule Conditions field in [Product Attributes](#).
- a. In the list under **Product Attribute**, choose the attribute that you want to use as the basis of the condition. For this example, the selected condition is "Category."





*Condition Line 2, Part 2*

The selected condition displays in the statement, followed by two more bold links. The options differ depending on the product attribute you select.

Once you set the attribute, it cannot be changed. To change the attribute, you must delete the line and add the new attribute. You can delete a condition line by clicking the **Delete** (✖) button at the end of the line.

- b. Click the **is** link, and choose the comparison operator that describes the condition for products to meet. For this example, the comparison operator is "is." The available options depend on the attribute selected in the previous step and may include different comparison options such as matching values, not including or including at least one of a value, and greater than, equal to, and less than a numerical amount. In this example, the options are "is" and "is not."

- c. Click the ... “more” link, and choose the attribute value upon which the condition is based. The options displayed depend on the attribute's setup. You may be asked to select an option from a drop-down, or you may need to enter text or numerical values for the condition. For this example, the field displays blank. To select your category(ies) for the rule, click the chooser icon (  ) to display your selection options. This rule is for Books, click the Books checkbox. The category number populates in the field. Click the green checkmark icon (  ) to accept your category selection(s).



*Condition Line 2, Part 3*


The selected item displays in the statement to complete the condition.



*Condition Line 2, Part 4*

This example condition is complete. As stated, this condition means that any product in your Magento catalog that has a defined category of "Books" (4) is eligible for this pricing rule. You can add more condition lines to further narrow your eligible products.

2. To add another condition line to the statement, return to step 1 and repeat the process until all desired conditions are complete.

You can delete a line of the condition statement at any time by clicking the **Delete** (  ) button at the end of the line.

## Price Rule Actions

If you are managing a store that is in "In Setup" status, see [Onboarding: Price Rule Actions](#).

Price Rule Actions define the adjustment calculations that will be applied to the price source to determine the listing price.

A [standard price rule](#) allows you to increase or decrease an Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or price source).

### Standard Price Rule Actions

SECTION	DESCRIPTION
Select Rule Type	Set the rule type, "Standard price rule."
Price Adjustment	Define the adjustment calculations that will be applied to the price source to determine the listing price

An [intelligent repricing rule](#) uses Amazon competitors' pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.

### Intelligent Repricing Rule Actions

SECTION	DESCRIPTION
Select Rule Type	Set the rule type, "Intelligent repricing rule," along with competitor price source and feedback requirements.
Competitor Conditional Variances	Define variances for conditions of the same product sold by competitors.
Price Adjustment	Define the adjustment calculations that will be applied to the price source to determine the listing price
Floor Price	Define your lowest price for a product to prevent multiple pricing rules from setting a listing price too low.
Optional Ceiling Price	Define your highest price for a product to ensure that your pricing remains competitive.

See [Price Rule Examples](#)



## Standard Price Rule Actions

A standard price rule action allows you to increase or decrease an Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or price source).

Sections of a standard price rule action include:

- Select Rule Type
- Price Adjustment

### To complete the Price Rule Actions section for a Standard Price Rule:

1. For **Rule Type**, select "Standard price rule" in the drop-down.
2. For **Price Action**, select an option in the drop-down.
  - **Decrease By**: Select this option if you want the defined price source value to be decreased before listing to Amazon.
  - **Increase By**: Select this option if you want the defined price source value to be increased before listing to Amazon.
3. For **Apply**, select an option:
  - **Apply as percentage**: Select this option if you want the defined price source value adjusted by a percentage.
  - **Apply as fixed amount**: Select this option if you want the defined price source value adjusted by a fixed amount.
4. For **Adjustment Amount** (required), enter the numerical value for the price adjustment.

If you selected "Apply as percentage" in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).

If you selected "Apply as fixed amount" in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a \$25 fixed adjustment).
5. When complete, tap **Save Pricing Rule**.

*Standard Price Rule*

## Field Descriptions

FIELD	DESCRIPTION
Rule Type	Select "Standard price rule."
Price Action	Options: <ul style="list-style-type: none"> <li>• <b>Decrease By:</b> Select this option if you want the defined price source value to be decreased before listing to Amazon.</li> <li>• <b>Increase By:</b> Select this option if you want the defined price source value to be increased before listing to Amazon.</li> </ul>
Apply	Options: <ul style="list-style-type: none"> <li>• <b>Apply as percentage:</b> Select this option if you want the defined price source value adjusted by a percentage.</li> <li>• <b>Apply as fixed amount:</b> Select this option if you want the defined price source value adjusted by a fixed amount.</li> </ul>
Adjustment Amount	Required. <p>If you selected "Apply as percentage" in the <b>Apply</b> field, enter the percent value (example: 25 for a 25% percent adjustment).</p> <p>If you selected "Apply as fixed amount" in the <b>Apply</b> field, enter the numerical value for the fixed amount (example: 25 for a \$25 fixed adjustment).</p>

## Intelligent Repricing Rule: Select Rule Type

An intelligent repricing rule uses Amazon competitors' pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.

Sections of an intelligent repricing rule include:

- **Select Rule Type**
- **Competitor Conditional Variances**
- **Price Adjustment**
- **Floor Price**
- **Optional Ceiling Price**

### To configure the **Select Rule Type** section of an **Intelligent Repricing Rule Action**:

Define the Rule Type in the **Select Price Rule Type** section.

1. For **Rule Type**, select "Intelligent repricing rule" in the drop-down.
2. For **Competitor Price Source**, select an option in the drop-down.
  - **Use "Buy Box" Price:** Select this option when you want to adjust your Amazon pricing based on the Amazon Buy Box seller price. A **Buy Box** price exists when multiple sellers on Amazon offer the same product. Amazon defines the Buy Box seller based on performance requirements. Merchants seek to win the Buy Box seller status and offers maximum visibility of your product listings.
  - **Use Lowest Competitor Price:** Select this option when you want to compare and adjust your listing price to competitor pricing for the same product. When this option is selected, the **Minimum Positive Feedback** and **Minimum Feedback Count** fields enable.
3. If enabled, select an option for **Minimum Positive Feedback** .
  - **All Competitor's Prices:** Select this option when you want to compare and adjust your pricing based on all competitor prices for the same product.
  - **Minimum 80/90/95/98% positive feedback:** Select this option when you want to limit the competitors to whom you compare and adjust your pricing for the same product. This will narrow down your competitors further by requiring their listing to have a minimum of the chosen percentage of positive feedback and then use the lowest price of that subset of competitors.
4. If enabled, enter a numerical value for **Minimum Feedback Count**.

This is an optional numerical value that further narrows down the competitive pricing. For example, if a merchant has a 95% positive feedback rating, but only has a feedback count of 20, this might not be a competitor you would want to be included to modify your pricing against. However, if you put a value of 1000, it would require that the merchant have 95% positive feedback and a minimum of 1000 merchant reviews.

You might use these competitor pricing and feedback options to avoid basing your pricing against a competitor who has poor feedback and is selling a lower quality product.

*Intelligent Repricing Rule: Select Rule Type*

## Field Descriptions

FIELD	DESCRIPTION
Rule Type	<p>Options:</p> <ul style="list-style-type: none"> <li>• <b>Standard price rule:</b> This rule type allows you to increase or decrease the Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or Price Source).</li> <li>• <b>Intelligent repricing rule:</b> This rule type allows you to adjust your products listing prices on Amazon, based on competitor's pricing. This option enables the Competitor Price source, Minimum Positive Feedback, Minimum Feedback Count, and Competitor Conditional Variances fields. It also enables the Floor Price and Optional Ceiling Price sections.</li> </ul>
Competitor Price Source	<p>Options:</p> <ul style="list-style-type: none"> <li>• <b>Use "Buy Box" Price:</b> Select this option when you want to adjust your Amazon pricing based on the Amazon Buy Box seller price. A <b>Buy Box</b> price exists when multiple sellers on Amazon offer the same product. Amazon defines the Buy Box seller based on performance requirements. Merchants seek to win the Buy Box seller status and offers maximum visibility of your product listings.</li> </ul>

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<ul style="list-style-type: none"><li>• <b>Use Lowest Competitor Price:</b> Select this option when you want to compare and adjust your listing price to competitor pricing for the same product. When this option is selected, the <b>Minimum Positive Feedback</b> and <b>Minimum Feedback Count</b> fields enable.</li></ul>
Minimum Positive Feedback	<p>Only active if Use Lowest Competitor Price is selected. Options:</p> <ul style="list-style-type: none"><li>• <b>All Competitor's Prices:</b> Select this option when you want to compare and adjust your pricing based on all competitor prices for the same product.</li><li>• <b>Minimum 80/90/95/98% positive feedback:</b> Select this option when you want to limit the competitors to whom you compare and adjust your pricing for the same product. This will narrow down your competitors further by requiring their listing to have a minimum of the chosen percentage of positive feedback and then use the lowest price of that subset of competitors.</li></ul>
Minimum Feedback Count	<p>Only active if Use Lowest Competitor Price is selected. This is an optional numerical value that further narrows down the competitive pricing. For example, if a merchant has a 95% positive feedback rating, but only has a feedback count of 20, this might not be a competitor you would want to be included to modify your pricing against. However, if you put a value of 1000, it would require that the merchant have 95% positive feedback and a minimum of 1000 merchant reviews.</p>

# Intelligent Repricing Rule: Competitor Conditional Variances

Sections of an intelligent repricing rule include:

- [Select Rule Type](#)
- **Competitor Conditional Variances**
- [Price Adjustment](#)
- [Floor Price](#)
- [Optional Ceiling Price](#)

An intelligent repricing rule uses Amazon competitors' pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.

If a product exists with the same condition as yours, the base match price will be the lowest competitor price with the same condition. If no competitors match your condition, the base match price will then go through other available competitor conditions starting with New, Refurbished, and continuing down through available conditions. After a condition is found, the base match price will be the lowest price within that condition.

For example, if you have a product listed with the condition Used; Good, and the base match price is \$7.99, and a competitor exists with the same product in the same condition (Used; Good) at a lower price, that price is used. If a competitor does not exist with the same condition, the system checks for a competitor with the next condition, which is New. If a competitor is found with that condition, the lowest of the prices is used.

## To configure the Competitor Conditional Variances section of an Intelligent Repricing Rule Price action:

Define your condition variances in the **Competitor Conditional Variances** section.

1. For **Conditional Variance**, select an option in the drop-down.
  - **Use all competitor's product conditions:** (Default selection) Select this option if you want your product to compare against any available condition (if a match does not exist for the condition you are listing).
  - **Use Only Matching Competitor's Product Condition:** Select this option if you want your product to compare only against competitor's products in the same condition. If no match exists, the product will price at the Price Source.
  - **Apply Variance (if competitor's product condition differs):** Select this option to first try to compare against your matched product condition. If no matching condition exists, a variance (as a percentage) will be applied relative to your product condition and the lowest competitor's condition.

When the Apply Variance feature is selected, additional variance fields display for each of your Amazon conditions. This feature allows you to utilize intelligent repricing rules when you offer products which are in a different condition than your competitors. To understand the calculation behind conditional variance, you will need to first understand that all variance is determined from a base match price.

Conditional variance options only displays when your listing settings for Condition are set to map condition values using a Magento product attribute. For all mapped conditions, you can denote a variance percentage of 1-100. The exception is collectibles, in which case a percentage greater than 100 may be applied.

*Intelligent Repricing Rule: Competitor Conditional Variances*

## Field Descriptions

FIELD	DESCRIPTION
Competitor Conditional Variances	<p>Use all competitor’s product conditions - If a match does not exist for the condition you are listing your product with, this option will match against any available condition. It will first attempt to match your condition, and will then work its way down from the New condition to Used; Acceptable.</p> <p>Use only matching competitor’s product condition - This option will match against your product's condition. If no match exists, the product will price at the Price Source.</p> <p>Apply variance (if competitor’s product condition differs) - This option will first try to match against your matched product condition. If no matching condition exists, it will apply a variance (as a percentage) relative to your product condition and the lowest competitor’s condition.</p>

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<p>The conditional variance option is only available when your listing settings for Condition are set to map condition values using a Magento product attribute. For all mapped conditions, you can denote a variance percentage of 1-100. The exception to this is collectibles, in which case a percentage greater than 100 may be applied.</p> <p>This feature allows you to utilize intelligent repricing rules when you offer products that are in a different condition than your competitors'. To understand the calculation behind conditional variance, you will need to first understand that all variance is determined from a base match price.</p>

## Calculating Conditional Variance Base

- Base Match Condition Variance (BMC) = The variance for the condition of our base match price competitor. In our example, BMC will be the variance for the New condition.
- Merchant Condition Variance (MCV) = The variance for the condition of our product. In our example, MCV = the variance for condition Used; Good.
- Base Match Price (BMP) = \$7.99 (explained above)

The formula for calculating conditional variance base is as follows:

$$\left[ \frac{100 - (\text{BMC} - \text{MCV})}{100} \right] \text{BMP} = \text{Conditional Variance Base}$$

### Example:

The conditional variance settings are as follows:



⌵ Competitor Conditional Variances

Conditional Variance  ?

New Condition Variance %

All amounts entered below will be calculated as a percentage relative to new condition (see help for more info).

Refurbished Condition Variance %

Used; Like New Condition Variance %

- BMC = 100 (Competitor condition = New)
- MCV = 80 (Merchant condition = Used; Good)
- BMP = \$7.99 (Base match price = The lowest price of the matched competitor condition)

$$\left[ \frac{100 - (100 - 80)}{100} \right] \$7.99 = \$6.39$$

Using the conditional variance base calculation from above, our conditional variance base = \$6.39. This will be the competitor price source used for our price rule actions, explained further in [Price Adjustment](#).

The Price Adjustment section differs slightly for Standard and Intelligent repricing rules. The "Match Competitor Price" option is only available in the Price Action drop-down when the Rule Type field is set to "Intelligent repricing rule."

Sections of an intelligent repricing rule include:

- **Select Rule Type**
- **Competitor Conditional Variances**
- **Price Adjustment**
- **Floor Price**
- **Optional Ceiling Price**

The price adjustment determines what you do once you have identified the competitor price source.

### To configure the Price Adjustment section:

Define your pricing adjustment in the **Price Adjustment** section.

1. For **Price Action**, select an option:
  - **Decrease By:** Select this option if you want the defined price source value to be decreased before listing to Amazon.
  - **Increase By:** Select this option if you want the defined price source value to be increased before listing to Amazon.
  - **Match Competitor Price:** (Intelligent repricing rule only) Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Adjustment Amount** fields are removed.
2. For **Apply**, select an option:
  - **Apply as percentage:** Select this option if you want the defined price source value adjusted by a percentage.
  - **Apply as fixed amount:** Select this option if you want the defined price source value adjusted by a fixed amount.
3. For **Adjustment Amount** (required), enter the numerical value for the price adjustment.

If you selected "Apply as percentage" in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).

If you selected "Apply as fixed amount" in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a \$25 fixed adjustment).

*Intelligent Repricing Rule: Price Adjustment*

## Field Descriptions

FIELD	DESCRIPTION
Price Action	<p>Options:</p> <ul style="list-style-type: none"> <li>• <b>Decrease By:</b> Select this option if you want the defined price source value to be decreased before listing to Amazon.</li> <li>• <b>Increase By:</b> Select this option if you want the defined price source value to be increased before listing to Amazon.</li> <li>• <b>Match Competitor Price:</b> (Intelligent repricing rule only) Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the <b>Apply</b> and <b>Adjustment Amount</b> fields are removed.</li> </ul>
Apply	<p>Options:</p> <ul style="list-style-type: none"> <li>• <b>Apply as percentage:</b> Select this option if you want the defined price source value adjusted by a percentage.</li> <li>• <b>Apply as fixed amount:</b> Select this option if you want the defined price source value adjusted by a fixed amount.</li> </ul>
Adjustment Amount	<p>Required.</p> <p>If you selected "Apply as percentage" in the <b>Apply</b> field, enter the percent value (example: 25 for a 25% percent adjustment).</p> <p>If you selected "Apply as fixed amount" in the <b>Apply</b> field, enter the numerical value for the fixed amount (example: 25 for a \$25 fixed adjustment).</p>

# Intelligent Repricing Rule: Floor Price

Sections of an intelligent repricing rule include:

- [Select Rule Type](#)
- [Competitor Conditional Variances](#)
- [Price Adjustment](#)
- **Floor Price**
- [Optional Ceiling Price](#)

The automated limit settings are used to help protect the floor pricing against the intelligent pricing rules. This allows the store owner to set a floor for their intelligent pricing rules with the ease of mind that the automated rules will not price their Amazon listing below a desired price.

Floor price attributes will work off the website scope if your Magento store is using website pricing scope. For more information, see [Price Scope](#).

Floor price is only used with [intelligent repricing rules](#).

## To configure the Floor Price section of an Intelligent Repricing Rule Price action:

Define your lowest price setting in the **Floor Price** section.

1. For **Floor Price Source**, select an attribute from the drop-down.

Select your Magento attribute which will indicate your relative floor limit. For example, if you don't want your product listing price to go below the Cost of your item, you would choose the Cost attribute.

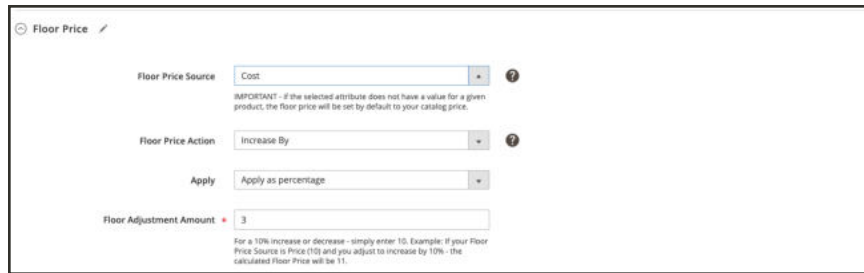
2. For **Floor Price Action**, select an option.

- **Decrease By:** Select this option if you want the defined floor price source value to be decreased before listing to Amazon.
- **Increase By:** Select this option if you want the defined floor price source value to be increased before listing to Amazon.
- **Match:** Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Floor Adjustment Amount** fields are disabled.

3. The **Apply** field defaults to "Apply as percentage."

4. For **Floor Adjustment Price**, enter the numerical value for the percent to adjust your floor price source.

In this example, the floor price is set to be 3% above the cost of the item.



### Onboarding: Intelligent Price Floor Price Section

## Field Descriptions

FIELD	DESCRIPTION
Floor Price Source	Choose the Magento attribute that will indicate your relative floor limit. For example, if you don't want your product listing price to go below the cost of your item, you would choose the attribute Cost.
Floor Price Action	Options: <ul style="list-style-type: none"> <li>• <b>Decrease By:</b> Select this option if you want the defined price source value to be decreased before listing to Amazon.</li> <li>• <b>Increase By:</b> Select this option if you want the defined price source value to be increased before listing to Amazon.</li> <li>• <b>Match Competitor Price:</b> Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the <b>Apply</b> and <b>Adjustment Amount</b> fields are removed.</li> </ul>
Apply	<b>Apply as percentage:</b> A percentage adjustment relative to the Floor Price Source.
Floor Adjustment Amount	Enter the numerical value for the percent to adjust your Floor Price Source.

## Intelligent Repricing Rule: Optional Ceiling Price

Sections of an intelligent repricing rule include:

- **Select Rule Type**
- **Competitor Conditional Variances**
- **Price Adjustment**
- **Floor Price**
- **Optional Ceiling Price**

The automated limit settings are used to help protect the ceiling pricing against the intelligent pricing rules. This allows the store owner to set a high-price-limit for their intelligent pricing rules.

### To configure the **Optional Ceiling Price** section of an **Intelligent Repricing Rule Price action**:

Select your optional highest price setting in the **Optional Ceiling Price** section.

1. For **Ceiling Price Source**, select an attribute from the drop-down.

Select your Magento attribute which will indicate your relative ceiling limit. For example, if you don't want your product listing price to go above the MSRP of your item, you would choose the Manufacturer's Suggested Retail Price attribute.

2. For **Ceiling Price Action**, select an option.
  - **Decrease By**: Select this option if you want the defined ceiling price source value to be decreased before listing to Amazon.
  - **Increase By**: Select this option if you want the defined ceiling price source value to be increased before listing to Amazon.
  - **Match**: Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Ceiling Adjustment Amount** fields are disabled.
3. The **Apply** field defaults to "Apply as percentage."
4. For **Ceiling Adjustment Price**, enter the numerical value for the percent to adjust your floor price source.

In this example, the ceiling price is set to be 2% below the MSRP of the item.



*Onboarding: Intelligent Price Floor Price Section*

## Field Descriptions

FIELD	DESCRIPTION
Ceiling Price Source	Choose the Magento attribute that will indicate your relative ceiling limit. For example, if you don't want your product listing price to go above the MSRP of your item, you would choose the Manufacturer's Suggested Retail Price attribute.
Ceiling Price Action	Options: <ul style="list-style-type: none"> <li>• <b>Decrease By:</b> Select this option if you want the defined price source value to be decreased before listing to Amazon.</li> <li>• <b>Increase By:</b> Select this option if you want the defined price source value to be increased before listing to Amazon.</li> <li>• <b>Match Competitor Price:</b> Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the <b>Apply</b> and <b>Adjustment Amount</b> fields are removed.</li> </ul>
Apply	<b>Apply as percentage:</b> A percentage adjustment relative to the Ceiling Price Source.
Ceiling Adjustment Amount	Enter the numerical value for the percent to adjust your Ceiling Price Source.

# Standard Price Rule Examples

## Discard Subsequent Rules

The ability to discard subsequent rules is a great feature inside of pricing rules that prevents multiple pricing rules from stacking and providing unintended additional discounts. To discard subsequent rules, a pricing rule must use the priorities that are set in the Priority section.

If Discard Subsequent Rules is set to Yes, the rules with lower priority (higher numbers) will not apply to the eligible products.

For example, let's say we have three pricing rules set up:

RULE NAME	PRIORITY	DISCARD SUBSEQUENT RULE
1. 10% off sale products	1	No
2. \$2 off sale products	2	Yes
3. 5% off all products	3	No

In this scenario, rules #1 and #2 would apply to the eligible products. Rule #3 would only apply to eligible products not contained within Rule #2. This is because it has a lower priority than #2 and Discard Subsequent Rules is set to Yes. So, the eligible products in the sale category would receive 10% off and \$2 off their Amazon listing price.

## Applying two standard price rules

FIELD	SETTING - RULE 1	SETTING - RULE 2
Rule Name	rule-1	rule-2
Priority	1	2
Rule Type	Standard price rule	Standard price rule
Price action	Decrease By	Decrease By
Apply	Apply as percentage	Apply as fixed amount



FIELD	SETTING - RULE 1	SETTING - RULE 2
-------	---------------------	------------------

Adjustment Amount	10	10
-------------------	----	----

**Product 1:**

Price: \$45.49

Rule 1 applied:  $\$45.49 \times (0.9) = \$40.94$

Rule 2 applied:  $\$40.94 - \$10.00 = \$30.94$

The final price after Rule 1 and Rule 2 are applied: \$30.94

**Product 2:**

Price: \$47.76

Rule 1 applied:  $\$47.76 \times (0.9) = \$42.98$

Rule 2 applied:  $\$42.98 - \$10.00 = \$32.98$

The final price after Rule 1 and Rule 2 are applied: \$32.98

## Intelligent Repricing Rule Examples

### Buy Box price with Floor Price Source: Price

FIELD	SETTING
Rule Name	rule-1
Priority	1
Rule Type	Intelligent repricing rule
Competitor Price Source	Use "Buy Box" Price
Price Action	Match Competitor Price
Floor Price Source	Price
Floor Price Action	Match

**Product 1:**

Price: \$15

Buy Box price from Amazon: \$10

Because the Buy Box price is less than the original price, the product is listed at the original price.

The final price after the rule is applied: \$15

**Product 2:**

Price: \$5

Buy Box price from Amazon: \$10

Because the Buy Box price is greater than the original price, the product is listed at the Buy Box price.

The final price after the rule is applied: \$10

**Buy Box price, Floor Price Source: Price, and a 20% price decrease**

FIELD	SETTING
Rule Name	rule-1
Priority	1
Rule Type	Intelligent repricing rule
Competitor Price Source	Use "Buy Box" Price
Price Action	Match Competitor Price
Floor Price Source	Price
Floor Price Action	Decrease By
Apply	Apply as a percentage
Floor Adjustment Amount	20

**Product 1:**

Price: \$20

Calculated Floor Price: \$16

Buy Box price from Amazon: \$15

Because the Buy Box price is less than the Calculated Floor Price, the product is listed at the Calculated Floor Price.

The final price after the rule is applied: \$16

**Product 2:**

Price: \$15

Calculated Floor Price: \$12

Buy Box price from Amazon: \$15

Because the Buy Box price is greater than the Calculated Floor Price, the product is listed at the Buy Box price.

The final price after the rule is applied: \$15

**Product 3:**

Price: \$17

Calculated Floor Price: \$13.60

Buy Box price from Amazon: \$15

Because the Buy Box price is greater than the Calculated Floor Price, the product is listed at the Buy Box price.

The final price after the rule is applied: \$15

**Lowest Price, All Competitor's Prices, and Use all competitor's product conditions**

FIELD	SETTING
Rule Name	rule-1
Priority	1
Rule Type	Intelligent repricing rule
Competitor Price Source	Use Lowest Competitor Price
Minimum Positive	All Competitor Prices
Feedback	
Conditional Variance	Use all competitor's product conditions
Price Action	Match Competitor Price

FIELD	SETTING
Floor Price Source	Price
Floor Price Action	Match

PRICE	CONDITION
\$17	New
\$15	New
\$14	Used; Very Good
\$13	Used; Good

**Product 1:**

Price: \$10

Condition: New

Because the lowest competitor price for the New condition is \$15, the product is listed at \$15.

The final price after the rule is applied: \$15

**Product 2:**

Price: \$10

Condition: Used; Acceptable

Because the lowest competitor price for the Used condition is \$13, the product is listed at \$13.

The final price after the rule is applied: \$13

**Intelligent repricing rule combining ceiling price, currency conversion, and VAT**

FIELD	SETTING
VAT	10%
Ceiling price source	\$10
Currency conversion	1.25Euro:1USD

Ceiling price in the European (VAT) market:  $\$10 \times 1.25 = \$12.50$

When the ceiling price in the European (VAT) market is hit, the VAT is calculated and added.

Final price after VAT:  $\$12.50 \times (1.1) = \$13.75$

## Combining multiple pricing rules, ceiling price, currency conversion, and VAT

### Intelligent pricing rule (from previous example):

FIELD	SETTING
Priority	1
VAT	10%
Ceiling price source	\$10
Currency conversion	1.25Euro:1USD

Ceiling price in the European (VAT) market:  $\$10 \times 1.25 = \$12.50$

Final price after VAT:  $\$12.50 \times (1.1) = \$13.75$

### Standard pricing rule:

FIELD	SETTING
Priority	2
Price Action	Increase By
Apply	Apply as fixed amount
Adjustment Amount	\$5.00

When the ceiling price is hit, the standard pricing rule will be applied on top of the intelligent pricing rule.

Final price after the standard pricing rule is applied:  $\$13.75 + \$5.00 = \$18.75$

## Price Adjustment

In this example, we have chosen to define our most competitive price by looking at our Amazon competitor's lowest price who also have 95% positive feedback and a minimum feedback count of 1,000 merchant reviews.

⊖ Select Rule Type

Rule Type  ?

Competitor Price Source  ?

Minimum Positive Feedback  ?

Minimum Feedback Count \*  ?

---

⊖ Competitor Conditional Variances

---

⊖ Price Adjustment

Price Action  ?

Apply  ?

Adjustment Amount \*  ?

Example: for 10%, simply enter 10.

*Price Adjustment Example*

After running this search based on these parameters, our competitive price comes back at \$25. From here, we have three different Price Action choices based on this lowest price.

FIELD	DESCRIPTION
Price Action	<ul style="list-style-type: none"> <li>Decrease By – This option will decrease your listing price relative to the lowest competitor price.</li> <li>Increase By – This option will increase your listing price relative to the lowest competitor price.</li> <li>Match Competitor Price – This option will change your Amazon listing price to match the lowest price based on our parameters. In our example, the Amazon listing price will be \$25.</li> </ul>
Apply	<ul style="list-style-type: none"> <li>Apply as percentage</li> <li>Apply as fixed amount</li> </ul>
Adjustment Amount	Numerical value to define the percentage or fixed amount for the discount to be applied.

FIELD	DESCRIPTION
-------	-------------

These selections mean that we are going to take the lowest price and set ours \$0.01 less.

### Floor price

FIELD	SETTING
-------	---------

Floor Price Source	Cost = \$5
--------------------	------------

Floor Price Action	Increase By
--------------------	-------------

Apply	Apply as percentage
-------	---------------------

Floor Adjustment Amount	5
-------------------------	---

Floor price calculation = Floor Price Source [\$5] \* Floor Adjustment Amount [5%] = \$5.25

This means that when our intelligent pricing rule is applied, it will not allow the listing price to be lower than \$5.25 for this specific product when the cost is \$5.

## Price Scope

Magento provides configuration for your pricing scope to be set to global or website. If pricing is set to global scope, there will be a single price source for all websites. If pricing is set to website scope, websites can vary their pricing across and also have a fallback default pricing value. To set your price scope, see [Magento Price configuration](#).

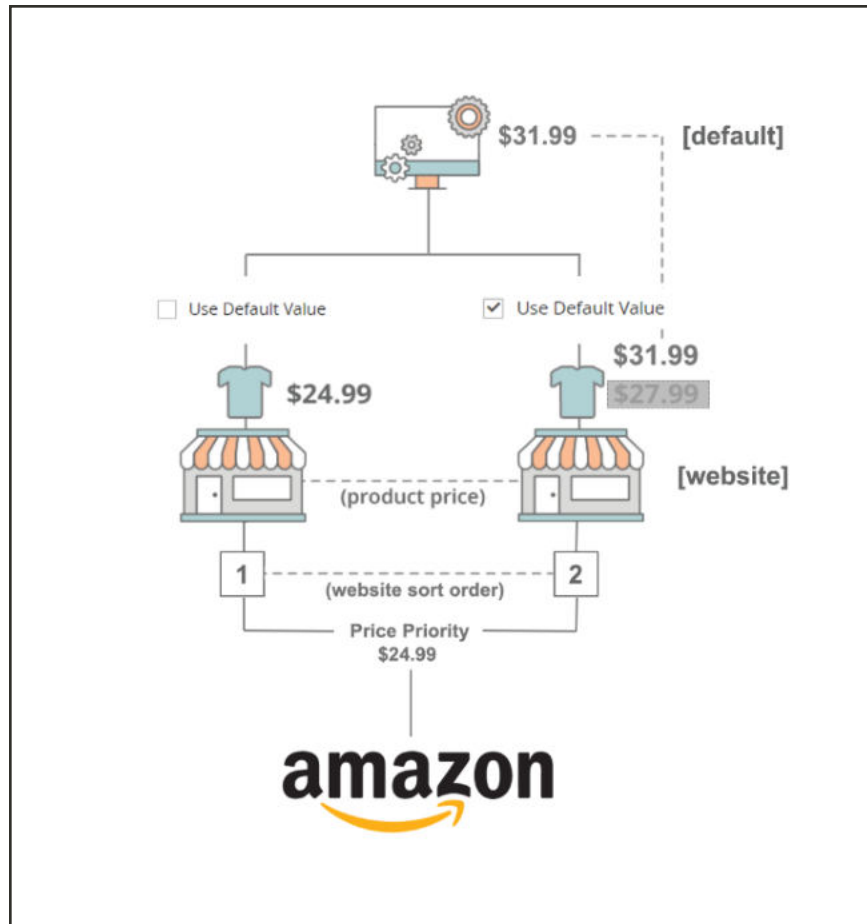
If you change your catalog price scope from global to website, all price type attributes will also change to website scope. For more information, see [Adding Websites](#).

When a website price is selected, there are two price sources: the website price and the default (fall back) price. For the Amazon integration, based on your Listing Rules, you can map products from multiple websites into a single Amazon marketplace. However, this introduces the issue of which price should be published if the product exists on multiple websites with differing prices.



## Price Priority Logic

In the example below, how does the system determine if we should publish \$31.99, \$24.99, or \$27.99?



To determine which price will be used if a product is on two websites and has a varying price per website, we use price priority logic (determined by the [website priority](#)).

To view your stores' sort order, on the Admin screen, tap **Stores** and then tap **All Stores**. In the Web Site column, tap the website name. The Web Site Information screen contains the Sort Order field, which determines the priority of the website. A value of '1' indicates the highest priority.

If the product price is set to Use Default, it will fall back to the default price value instead of the website price value.

### Example 1:

	WEBSITE PRIORITY	PRICE [WEBSITE]	USE DEFAULT
Default	0	\$31.99	--
Store 1	1	\$24.99	No
Store 2	2	\$27.99	Yes

- The Magento Price Source is set to Price.
- Look at the website with the highest website priority, which is Store 1.
- Since Store 1 is set to use the website price (Use Default = No), the published price will be \$24.99.

### Example 2:

	WEBSITE PRIORITY	PRICE [WEBSITE]	USE DEFAULT
Default	0	\$31.99	--
Store 1	1	\$24.99	Yes
Store 2	2	\$27.99	No

- The Magento Price Source is set to Price.
- Look at the website with the highest website priority, which is Store 1.
- Since Store 1 **is not** set to use the website price (Use Default = Yes) look at the next website in the sort order.
- Since Store 2 **is** set to use the website price (Use Default = No), the published price will be \$27.99.

### Example 3:

	WEBSITE PRIORITY	PRICE [WEBSITE]	NON-PRICE [WEBSITE]
Default	0	\$31.99	\$30.00

	WEBSITE PRIORITY	PRICE [WEBSITE]	NON-PRICE [WEBSITE]
Store 1	1	\$24.99	--
Store 2	2	\$27.99	\$20.00

In this example we have added in the non-price value, which is used if you select another value for the Magento Price Source in the **Listing Price** settings. The non-price value will always use price as the fallback price.

- The Magento Price Source is set to Non-Price.
- Look the website with the highest website priority, which is Store 1.
- Since Store 1 **is not** set to use the non-price attribute, look at the next website in the sort order.
- Since Store 2 **is** set to use the non-price attribute (Non-Price [Website] = \$20.00), the published price will be \$20.00

## Buy Box Competitor Pricing

The Buy Box is awarded by Amazon to the seller who has the product listed usually at the best price, along with other factors such as FBA/Prime shipping offered, availability, and the seller's performance.

The Buy Box Competitor Pricing tab displays the Buy Box listing price, shipping price, and landed price of your competitors. This can be used to understand the price positioning of your competitors on Amazon.

**Intelligent repricing rules** can be configured to adjust your pricing based on the Amazon Buy Box price.

ASIN	Is Seller	Condition	Listing Price	Shipping Price	Landed Price	Last Updated
B01LRJQV28	No	Used: Very Good	\$264.50	\$8.49	\$272.99	Sep 7, 2018 8:34:08 AM
B01LRJQV28	No	New	\$359.99	\$0.00	\$359.99	Sep 7, 2018 8:34:08 AM

*Buy Box Competitor Pricing*

## Default Columns

COLUMN	DESCRIPTION
ASIN	A unique block of 10 letters and/or numbers that identify items.  For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to your catalog. You can find an item's ASIN on the product detail page along with additional details relating to the item (such as size, number of pages, or number of discs).
Is Seller	Whether or not the seller has won the Buy Box position for the listing.
Condition	The condition of the product.
Listing Price	The price used for your Amazon listings.
Shipping Price	The cost to ship the product.
Landed Price	The listing price for the product plus its shipping price.
Last Updated	The date the Buy Box pricing was last updated.

## Lowest Competitor Pricing

The Lowest Competitor Pricing table displays the lowest final landing price, but is broken down into shipping price and listing price. This can be used to understand the price positioning of your competitors on Amazon.

**Intelligent repricing rules** can be configured to adjust your pricing based on the competitor prices.

ASIN	Condition	Fulfillment Channel	Listing Price	Shipping Price	Landed Price	Feedback Rating	Feedback Count	Last Updated
0131177052	Used: Good	Merchant	\$43.35	\$0.00	\$43.35	95	1909994	Apr 16, 2019 10:05:06 AM
0131177052	New	Merchant	\$53.55	\$3.90	\$57.45	80	3364	Apr 16, 2019 10:05:06 AM
0131177052	New	Merchant	\$52.32	\$3.99	\$56.31	80	259844	Apr 16, 2019 10:05:06 AM
0131177052	Used: Like New	Merchant	\$52.32	\$3.99	\$56.31	80	259844	Apr 16, 2019 10:05:06 AM

*Lowest Competitor Pricing*

## Default Columns

COLUMN	DESCRIPTION
ASIN	A unique block of 10 letters and/or numbers that identify items.

## Default Columns (cont.)

COLUMN	DESCRIPTION
	For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to your catalog. You can find an item's ASIN on the product detail page along with additional details relating to the item (such as size, number of pages, or number of discs).
Condition	The condition of the product.
Fulfillment Channel	The method of fulfillment
Listing Price	The price used for your Amazon listings.
Shipping Price	The cost to ship the product.
Landed Price	The listing price for the product plus its shipping price.
Feedback Rating	The average rating of the competitor from their customers (0 - 100).
Feedback Count	The number of ratings of the competitor from their customers.
Last Updated	The date the competitor pricing was last updated.



## Managing Amazon Listings

Product Listing settings are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing settings for an Active or Inactive store in the [store's dashboard](#). In the **I Want To...** section, tap **Manage Listings**. The Product Listings screen displays with the Active tab displayed by default.

The Product Listings screen contains several tabs from which you can view the statuses of all of your listings as well as match your products to Amazon listings.

Each tab differs slightly in the tasks available in the **Actions** drop-down, the **Select** (Action column) drop-down, and the default and available table columns, but the [workspace controls](#) are the same and allow you to customize the data that is displayed.

The **Actions** drop-down options can apply the selected action to all listings selected (checked), while options in the **Select** drop-down in the **Action** column apply the action only to the individual listing.

[Manage Listings by Status / Tab](#)

[Manage Listings by Action](#)

### To access Product Listings:

1. On the Admin sidebar, tap **Marketing**. Then, under **Channels**, tap **Amazon**.
2. In the **Amazon Stores** tab, tap the store name for which you want to view listings.
3. On the store dashboard, under **I Want to See...**, tap **Manage Listings**.

## Managing Product Listings by Tab

The Product Listings screen contains several tabs from which you can view the statuses of all of your listings as well as match your products to Amazon listings.

Each tab differs slightly in the tasks available in the **Actions** drop-down, the **Select** (Action column) drop-down, and the default and available table columns, but the [workspace controls](#) are the same and allow you to customize the data that is displayed.

The **Actions** drop-down options can apply the selected action to all listings selected (checked), while options in the **Select** drop-down in the **Action** column apply the action only to the individual listing.

[Manage Listings by Action](#)



*Product Listings tabs*

## Product Listings Tabs

TAB	DESCRIPTION	ACTIONS
<b>Incomplete</b>	Displays your Magento catalog products that meet your defined listing settings but are missing information required by Amazon for a listing.	<ul style="list-style-type: none"> <li>• Re-attempt auto match to Amazon Listing</li> <li>• <b>Update Required Info</b></li> <li>• <b>View Details</b></li> </ul>
<b>New Third Party</b>	Displays your existing Amazon listings (based on information received from Amazon) that are not matched to a product in your Magento catalog.	<ul style="list-style-type: none"> <li>• <b>Create New Catalog Product(s)</b></li> <li>• Attempt Automatic Match</li> <li>• <b>Assign Catalog Product</b></li> <li>• Create New Catalog Product</li> <li>• <b>View Details</b></li> </ul>
<b>Ready to List</b>	Displays your catalog products that are ready to create new Amazon listings, but your store is set not to automatically publish new listings. This tab is used to manually publish your new listings.	<ul style="list-style-type: none"> <li>• Publish Product to Amazon</li> <li>• Publish On Amazon</li> <li>• <b>View Details</b></li> </ul>
<b>Inactive</b>	Displays your catalog products that have been published to Amazon, but Amazon has not approved the listing for Active status.	<ul style="list-style-type: none"> <li>• <b>End Listing(s) on Amazon</b></li> <li>• <b>Edit Listing Overrides</b></li> <li>• <b>View Details</b></li> <li>• <b>Create Override</b></li> <li>• <b>Edit Assigned ASIN</b></li> <li>• <b>Create Alias Seller SKU</b></li> <li>• Switch to Fulfilled by Amazon/Merchant</li> <li>• <b>End Listing</b></li> </ul>
<b>Active</b>	Displays your Amazon listings that have been matched to a product in your Magento catalog, have been published to	<ul style="list-style-type: none"> <li>• <b>End Listing(s) on Amazon</b></li> <li>• <b>Edit Listing Overrides</b></li> </ul>

## Product Listings Tabs (cont.)

TAB	DESCRIPTION	ACTIONS
	Amazon, and Amazon has approved for Active status.	<ul style="list-style-type: none"> <li>• <a href="#">View Details</a></li> <li>• <a href="#">Create Override</a></li> <li>• <a href="#">Edit Assigned ASIN</a></li> <li>• <a href="#">Create Alias Seller SKU</a></li> <li>• Switch to Fulfilled by Amazon/Merchant</li> <li>• <a href="#">End Listing</a></li> </ul>
<b>Overrides</b>	Displays your Amazon listings that meet the criteria for a defined override and to which the override has been applied. Overrides take priority over any other account setting.	<ul style="list-style-type: none"> <li>• <a href="#">Edit Listing Overrides</a></li> <li>• <a href="#">Edit Overrides</a></li> <li>• <a href="#">View Details</a></li> </ul>
<b>Ineligible</b>	Displays your existing Amazon listings that are no longer eligible, based on your defined <a href="#">listing settings</a> .	<ul style="list-style-type: none"> <li>• <a href="#">End Listing(s) on Amazon</a></li> <li>• <a href="#">Edit Listing Overrides</a></li> <li>• <a href="#">View Details</a></li> <li>• <a href="#">Create Override</a></li> <li>• <a href="#">Edit Assigned ASIN</a></li> <li>• <a href="#">Create Alias Seller SKU</a></li> <li>• Switch to Fulfilled by Amazon/Merchant</li> <li>• <a href="#">End Listing</a></li> </ul>
<b>Ended</b>	Displays your Amazon listings that have manually been ended (removed) from Amazon.	<ul style="list-style-type: none"> <li>• <a href="#">Publish Product to Amazon</a></li> <li>• <a href="#">View Details</a></li> <li>• <a href="#">Publish On Amazon</a></li> <li>• <a href="#">Create Alias Seller SKU</a></li> </ul>

### To access Product Listings:

1. On the Admin sidebar, tap **Marketing**. Then, under **Channels**, tap **Amazon**.
2. In the **Amazon Stores** tab, tap the store name for which you want to view listings.
3. On the store [dashboard](#), under **I Want to See...**, tap **Manage Listings**.



## Incomplete Listings

Listings that display on this tab include your Magento catalog products that meet your Amazon eligibility requirements as defined in your listing rules but are missing information required by Amazon before listing (example: the Amazon ASIN or a defined product condition).

There are four possible causes for an incomplete listing, each identified by its status.

### Incomplete Listing Status

STATUS	REASON	UPDATE ACTION
Missing Condition	Amazon accepts listings in various conditions (example: New, Refurbished, Used: Like New) listing requires a defined condition.	Select the respective product condition and submit.
Unable to Assign to Amazon Listing	Automatic match of this listing to your catalog failed. If no match is found, the listing cannot be managed by Amazon Sales Channel	Manually assign an ASIN to the catalog product to match to the listing.
Multiple Matches Found	Automatic match of this listing to your catalog failed. If multiple possible matches are found, you must select the correct match for your product.	Manually select the catalog product to match to this listing.
Has Variants	If your product has variants, such as a t-shirt that is available in different sizes or colors, you must select the variant in your catalog to be correctly assigned and matched to the listing	View the variants that are associated with your product and choose the correct variant to assign and match to this listing.

When incomplete listings are properly matched to your catalog products, the listing will move from the Incomplete tab and will publish to Amazon based on your [Product Listing Actions](#) setting.

There are three available actions on this tab to correct an Incomplete listing.

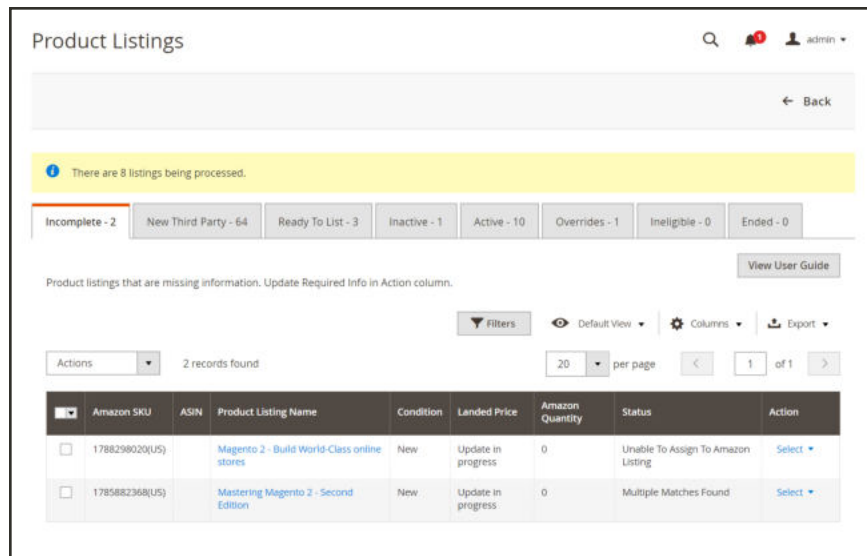
In the **Actions** drop-down:

- **Re-attempt to auto match to Amazon listings:** Selecting this option initiates the automatic process for matching your Amazon listings data to your Magento catalog. If products are not automatically matching, revisit your [Catalog Search](#) options in your listing settings. If listings don't automatically match after updating your Catalog Search options, you can match products manually in the Update Required Info action.

In the **Select** drop-down in the Actions column:

- **Update Required Info:** Select this option if listings do not automatically match to your catalog. You can manually match catalog products to listings, manually assign an ASIN to a catalog match, or update a missing condition for listing. See [Update Required Info](#).
- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

**Note:** If you have listings in process, the number of listings will display in a message above the tabs



*Incomplete Listings*

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

### Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items.

## Default Columns (cont.)

COLUMN	DESCRIPTION
	ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Product Listing Name	The name of the product.
<a href="#">Condition</a>	The condition of the product.
Landed Price	The listing price for the product plus its shipping price.
Amazon Quantity	The quantity available once the product is actively listed on Amazon.
Status	The status of the listing, defined by Amazon. See <a href="#">Incomplete Status</a> .
Action	List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options: <a href="#">Update Required Info</a> <a href="#">View Details</a>

## New Third Party Listings

Listings that display on this tab include your existing Amazon listings that have not been matched to a product in your Magento catalog. To utilize listing management for quantity, pricing, handling time, and more, each of your Amazon listings must be assigned (matched) to a product in your Magento catalog. You have a few options to assign a listing to a product in your Magento catalog.

In the **Actions** drop-down:

- **Create New Catalog Product(s):** Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See [Creating and Assigning Catalog Products](#).
- **Attempt Automatic Match:** Select this option to prompt Amazon Sales Channel will automatically attempt to match the selected listings to your catalog based on your current [Catalog Search](#) options in your Listing Settings. If you modify your Catalog Search options, this action will allow you to attempt the matching process again.

In the **Select** drop-down:

- **Assign Catalog Product:** Select this option to manually match the listing with a product in your Magento catalog. See [Creating and Assigning Catalog Products](#).
- **Create New Catalog Product:** Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See [Creating and Assigning Catalog Products](#).
- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

**Note:** If you have listings in process, a message will be displayed above the tabs indicating how many.

Product Listings

There are 2324 listings being processed.

Incomplete - 0 **New Third Party - 12** Inactive - 0 Active - 3368 Overrides - 0 Ineligible - 0 Ended - 1

Amazon product listings that are not matched to Magento products.

Filters Default View Columns Export

12 records found 20 per page 1 of 1

Amazon SKU	ASIN	Product Listing Name	Condition	Listing Price	Amazon Quantity	Status	Action
B00005U0SL(US)	B00005U0SL	Modem Blaster v92 DE5621 External (Serial Port)	New	0	0	Awaiting Product Assignment	Select
B00005V9Q3(US)	B00005V9Q3	Panasonic PV-V4022 4-Head Mono VCR	New	0	0	Awaiting Product Assignment	Select
B000062R7Q(US)	B000062R7Q	Dose 2 [Audio CD] DJ X	New	0	0	Awaiting Product Assignment	Select
B000062TTF(US)	B000062TTF	Creative Labs Sound Blaster Extigy Sound Card	New	0	0	Awaiting Product Assignment	Select
B0002BEQ8(US)-2	B0002BEQ8	Metra 70-1761 Radio Wiring Harness For Toyota 87-Up Power 4 Speaker	New	0	0	Awaiting Product Assignment	Select
B000K79FO(US)-2	B000K79FO	Symmetra Px 80kW Frame, 208V	New	100	100	Awaiting Product Assignment	Select
B00JBR5VE(US)-play1	B00JBR5VE	Party Time Pirates Treasure Molded Mini Character Birthday Candle Set, Pack of 4, Multi, 2.1" x 3.5" Wax	New	100	100	Awaiting Product Assignment	Select
B01LWX2RG-2	B01LWX2RG	DualShock 4 Wireless Controller for PlayStation 4 - Jet Black [video game]	Used; Like New	0	0	Awaiting Product Assignment	Select

### New Third Party Listings

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

### Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items.  ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.

## Default Columns (cont.)

COLUMN	DESCRIPTION
Product Listing Name	The name of the product.
<b>Condition</b>	The condition of the product.
Listed Price	Identifies the listing price for the item, as defined by the price source and any applicable pricing rules.
Amazon Quantity	The quantity available once the product is actively listed on Amazon.
Status	The status of the listing, defined by Amazon.
Action	List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options: <a href="#">Assign Catalog Product</a> <a href="#">Create New Catalog Product</a> <a href="#">View Details</a>

## Ready to List

The Ready to List tab displays your Magento catalog meet your defined listing settings and are ready to publish to Amazon as a **new** listing. Depending on your **Product Listing Actions** setting, this tab displays during **store review** in onboarding and when managing listings from your **store dashboard**.

The Ready to List tab only displays when your **Automatic List Action** field in your listing settings is set to "Do Not Automatically List Eligible Products." This setting tells Amazon Sales Channel that any new Amazon listings must be published manually.

When the field is set to "Automatically List Eligible Products," Amazon Sales Channel automatically publishes new listings for your eligible catalog products. Since new listings are published automatically, this tab does not display.

In this tab, you can sort your active published listings using the columns provided, or add and remove columns as needed. You can also perform several actions for a listing.

You have a few options to manually publish a new listing to Amazon.

### To publish a single or multiple catalog products to new Amazon listing (s)

1. In the left-side column, tap to check each of the listings you wish to publish.
2. In the Action drop-down, tap **Publish Product to Amazon**.

A confirmation message displays that the product(s) is scheduled to be listed on Amazon.

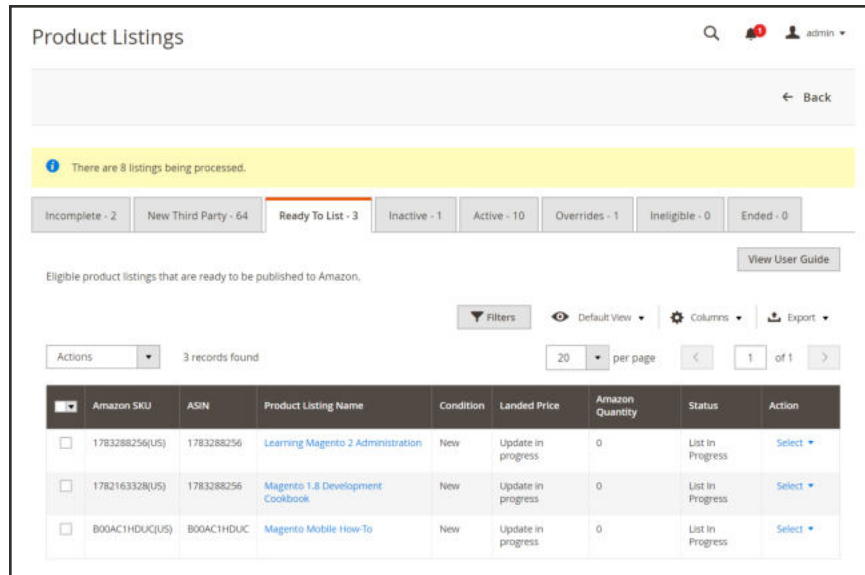
### To publish a single catalog product to a new Amazon listing

1. In the Action column for the listing, tap **Select** and tap **Publish on Amazon**.

A confirmation message displays that the product is scheduled to be listed on Amazon.

Listing information is published to Amazon based on your cron settings. Listing information will send to Amazon at the next data sync. Until Amazon replies with the listing confirmation, the manually published listing(s) remains on the Ready to List tab with a status of "List in Progress." Once the listing confirmation is received from Amazon, the listing(s) removes from the Ready to List tab and displays in the Active tab with a status of "Active."

**Note:** If you have listings in process, the number of listings will display in a message above the tabs



### Ready to List

## Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items. ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Product Listing Name	The name of the product.
Condition	The condition of the product.
Landed Price	The listing price for the product plus its shipping price.
Amazon Quantity	The quantity available once the product is actively listed on Amazon.



## Default Columns (cont.)

COLUMN	DESCRIPTION
Status	The status of the listing, defined by Amazon.
Action	List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options: Publish on Amazon <a href="#">View Details</a>

## Common Causes of Ready to List Listings

- Ready to List**  
Product has been matched to an Amazon ASIN and is scheduled to be listed. If your account settings are NOT set to automatically list eligible products, the Ready to List status would represent the products which are ready to be manually listed.
- List in Progress**  
The product listing has been submitted to Amazon, and is awaiting confirmation of acceptance from Amazon.

## Inactive Listings

Listings that display on this tab include your products that have been published to Amazon but are not active on the Amazon marketplace. Your listings could be inactive for a few different reasons. For example, you might not be eligible to list that particular brand. Inactive listings are dictated by Amazon's listing standards and your Amazon Seller Central account permissions.

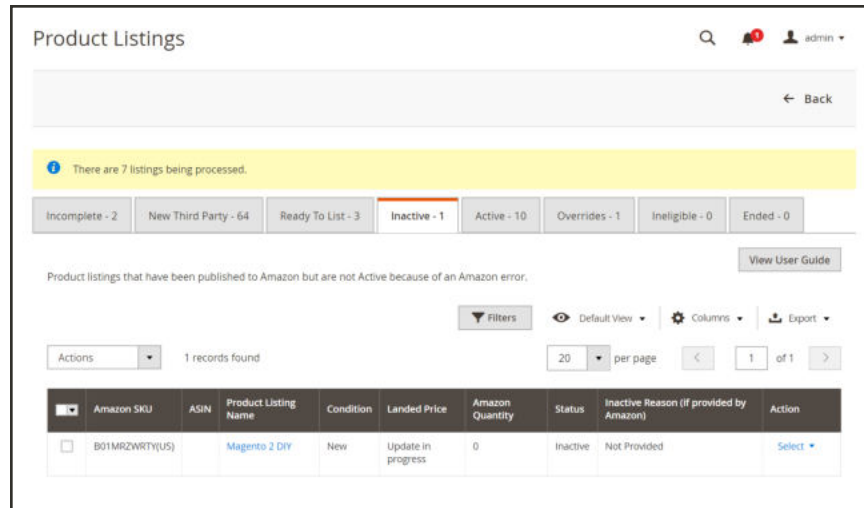
In the **Actions** drop-down:

- **End Listing(s) on Amazon:** Select this option to remove all selected listings from the Amazon marketplace. See [Ended Listings](#).
- **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down:

- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).
- **Create Override:** Select this option to create a new override and apply it to this listing. See [Creating Listing Overrides](#).
- **Edit Assigned ASIN:** Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See [Edit Assigned ASIN](#).
- **Create Alias Seller SKU:** Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).
- **Switch to Fulfilled by Amazon/Merchant:** Select this option to change the fulfillment method associated to the order. See [Fulfilled By](#).
- **End Listing:** Select this option to remove the listing from the Amazon marketplace. See [Ended Listings](#).

**Note:** If you have listings in process, a message will be displayed above the tabs indicating how many.



### *Inactive Listings*

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

### Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items.  ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Product Listing Name	The name of the product.
Condition	The condition of the product.
Landed Price	The listing price for the product plus its shipping price.
Amazon Quantity	The quantity available once the product is actively listed on Amazon.
Status	The status of the listing, defined by Amazon.

## Default Columns (cont.)

COLUMN	DESCRIPTION
Inactive Reason (if provided by Amazon)	<p>Amazon will not always provide a reason for inactive listings, and you may need to reach out to customer support to resolve listing issues. In some instances, Amazon will notify you of a reason. To view these responses, in the Actions column, tap <b>View Details</b>.</p> <p>If these issues are resolved and Amazon lifts the error, the products will change to Active listings and move to the Active listings table.</p>
Action	<p>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options:</p> <ul style="list-style-type: none"><li><a href="#">View Details</a></li><li><a href="#">Create Override</a></li><li><a href="#">Edit Assigned ASIN</a></li><li><a href="#">Create Alias Seller SKU</a></li><li><a href="#">Switch to Fulfilled By Amazon/Merchant</a></li><li><a href="#">End Listing</a></li></ul>

## Active Listings

Listings that display on this tab include your Amazon listings that are active on the Amazon marketplace and that have been matched to a product in your Magento catalog. In this tab, you can sort your active published listings using the columns provided, or add and remove columns as needed. You can also perform several actions for a listing.

In the **Actions** drop-down:

- **End Listing(s) on Amazon:** Select this option to remove all selected listings from the Amazon marketplace. See [Ended Listings](#).
- **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down in the Actions column:

- **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).
- **Create Override:** Select this option to create a new override and apply it to this listing. See [Creating Listing Overrides](#).
- **Edit Assigned ASIN:** Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See [Edit Assigned ASIN](#).
- **Create Alias Seller SKU:** Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).
- **Switch to Fulfilled by Amazon/Merchant:** Select this option to change the fulfillment method associated to the order. See [Fulfilled By](#).
- **End Listing:** Select this option to remove the listing from the Amazon marketplace. See [Ended Listings](#).

**Note:** If you have listings in process, the number of listings will display in a message above the tabs

Product Listings

There are 8 listings being processed.

Incomplete - 2   New Third Party - 64   Ready To List - 3   Inactive - 1   **Active - 10**   Overrides - 1   Ineligible - 0   Ended - 0

Product listings that have been published to Amazon and are ready for sale.

Filters   Default View   Columns   Export

Actions   10 records found   20 per page   1 of 1

<input type="checkbox"/>	Amazon SKU	ASIN	Product Listing Name	Condition	Landed Price	Amazon Quantity	Buy Box Won	Status	Action
<input type="checkbox"/>	B002LAS6X0(U.S)	B002LAS6X0	Isle of Dogs Coature No. 63 Detangle Conditioning Mist for Matted Dog Hair	New	\$31.00	50	NA	Active	Select
<input type="checkbox"/>	B002LAS6YE(U.S)	B002LAS6YE	Isle of Dogs Coature No. 16 White Coat Evening Primrose Oil Dog Shampoo, 1 liter	New	\$36.00	100	NA	Active	Select
<input type="checkbox"/>	B002LAS6YY(U.S)	B002LAS6YY	Isle of Dogs Coature No. 18 Black Coat Evening Primrose Oil Dog Shampoo, 1 liter	New	\$37.60	100	NA	Active	Select
<input type="checkbox"/>	B002LAS6Z8(U.S)	B002LAS6Z8	Isle of Dogs Coature No. 20 Royal Jetly Dog Shampoo for thin or shedding coats, 1 liter	New	\$39.20	100	NA	Active	Select
<input type="checkbox"/>	1951729(U.S)	B019QB0AH2	Paper Mate InkJoy Gel Pens, Medium Point, Assorted Colors, 12 Count	New	\$25.95	15	NA	Active	Select
<input type="checkbox"/>	1968614(U.S)	B019QB0DBU	Paper Mate InkJoy Gel Pens, Fine Point, Assorted Colors, 8 Count	Used: Very Good	\$15.00	15	NA	Active	Select
<input type="checkbox"/>	B0002LD14Q(U.S)	B0002LD14Q	Sharpie Liquid Highlighters, Chisel Tip, Assorted Colors, 10 Count	New	\$11.00	20	NA	Active	Select
<input type="checkbox"/>	1783287055(U.S)	1783287055	Magento Site Performance Optimization [Paperback] Nayrolles, Mathieu	New	\$35.00	0	NA	Active	Select
<input type="checkbox"/>	374122815(U.S)	374122815X	Magento 2 Handbuch (German Edition) [Paperback] Stech, Carsten	New	\$60.00	0	NA	Active	Select
<input type="checkbox"/>	1783554193(U.S)	1783554193	Magento PHP Developer's Guide - Second Edition [Paperback] MacGregor, Allan	New	\$60.00	0	NA	Active	Select

### Active Listings

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

### Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items.

## Default Columns (cont.)

COLUMN	DESCRIPTION
	ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Product Listing Name	The name of the product.
Condition	The condition of the product.
Landed Price	The listing price for the product plus its shipping price.
Amazon Quantity	The quantity available once the product is actively listed on Amazon.
Status	The status of the listing, defined by Amazon.
Buy Box Won	Whether the product listing won the Buy Box position.
Action	List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options: <a href="#">View Details</a> <a href="#">Create Override</a> <a href="#">Edit Assigned ASIN</a> <a href="#">Create Alias Seller SKU</a> <a href="#">Switch to Fulfilled By Amazon/Merchant</a> <a href="#">End Listing</a>

## Overrides

The Overrides tab displays your Amazon listings to which you have applied an override. An override is a listing-specific setting that can be used set a defined value to a listing. An override applied to a listing defines the setting for the listing, regardless of other defined listing settings or rules for which the listing is eligible. When an override is applied to a listing, the listing displays on the Overrides tab. The value defined in the override displays in the appropriate column for the listing. There are four types of overrides that can be applied: Price, Handling Time, Condition, and Seller Notes.

### Types of Overrides

TAB	DESCRIPTION
Price	<p>An override that sets the price of the listing, ignoring all other price settings for the listing.</p> <p><b>Example:</b> You've defined a 20% discount price rule that applies to all products in a specific category of your catalog. You have a product that is brand new to market and the demand is high so you do not want the discounted price applied to the listing even though the product is in the category for which the rule is defined. You can select the listing, create a price override, and define the listing price in a price override.</p>
Handling Time	<p>An override that sets the handling time for a listing, ignoring the default handling time set in listing settings.</p> <p><b>Example:</b> Your default handling time for your listings is set to 2 days. You have a product that is fragile and requires an extra day to ensure its special packaging for shipping. You can view the listing, create a handling time override, and define the handling time at three days.</p> <p><b>Note:</b> Not available for products set to "Fulfilled by Amazon."</p>
Condition	<p>An override that sets the condition value of a listing, regardless of the condition attribute assigned to the listing.</p> <p><b>Example:</b> Most of the products in your catalog are New condition, but you have a product that is in Refurbished condition. You can view the listing, create a condition override, and define the Refurbished condition for the listing.</p> <p><b>Note:</b> Not available for products set to "Fulfilled by Amazon."</p>



## Types of Overrides (cont.)

TAB	DESCRIPTION
Seller Notes	<p>An override that defines the Seller Notes section of the listing. This field can be used to add additional information related to the product or the override applied, typically used to describe the condition of "non-new" products. Text in this field displays with the listing for the shopper. Seller notes can not be added for a listing with a condition value of "New."</p> <p><b>Example:</b> You have a product that is in Refurbished condition. Normally products in this conditions do not include any manuals or documents, but you have a different supplier for this product that includes a manual. You can view the listing, create a seller notes override, and add your text note that is unique to this listing about the manual so the shopper knows it is included.</p> <p><b>Note:</b> If a product has a defined condition of "New," you can enter a seller notes override, but Amazon will not display seller notes for a "New" product.</p>

You can create, edit, or remove an override for a single listing. The **Create Override** action is available in the Action column when viewing listings on the Inactive, Active, and Ineligible tabs. The **Edit Overrides** action is only available in the Action column when a listing has an override applied and is viewed on the Overrides tab.

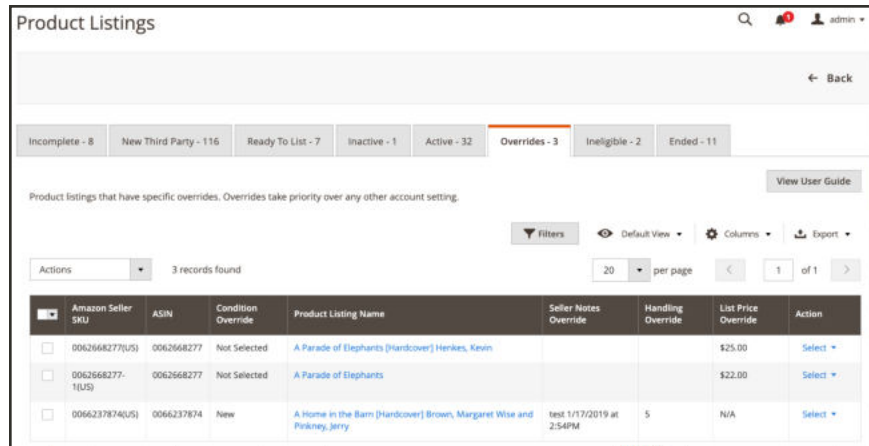
You can also create, edit, or remove an override to multiple listings. The **Edit Listing Overrides** action is available in the Actions drop-down when viewing listings on the Inactive, Active, Overrides, and Ineligible tabs.

Removing an override tells the listing to use the values defined by your listing settings and rules.

When defining an override, you can also choose to enter a single type of override or any combination of the types.

See [Creating and Editing Overrides](#).

**Note:** If you have listings in process, the number of listings will display in a message above the tabs



*Overrides tab*

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

## Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items. ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Condition Override	The new condition defined in the override. If the override applied to the listing is not a condition override, "Not Selected" will display.
Product Listing Name	The name of the product.
Seller Notes Override	The new seller notes defined in the override. If the override applied to the listing is not a seller notes override, this column will be blank.
Handling Override	The new handling time defined in the override (in days). If the override applied to the listing is not a handling time override, this column will be blank.

## Default Columns (cont.)

COLUMN	DESCRIPTION
List Price Override	The new listing price defined in the override. If the override applied to the listing is not a price override, "N/A" will display in this column.
Action	List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options: <a href="#">Edit Overrides</a> <a href="#">View Details</a>

## Optional Columns

COLUMN	DESCRIPTION
Id	The numerical identifier assigned by Magento.
Magento SKU	The SKU (Stock Keeping Unit) assigned to a product in Magento to identify the product, options, price, and manufacturer.
Store Name	Identifies the name of the Amazon Sales Channel store to which the order is assigned, as defined during store setup.

## Ineligible Listings

The Ineligible Listings tab displays a list of all the products that are currently published on Amazon but are not eligible as a listing based on your current listing rules. If a previous product was eligible and the listing rules are modified making some products ineligible, the quantity associated with a product drops to 0 and the product is marked as ineligible but will still be present on your Amazon Seller Account.

To move a product out of the Ineligible Listings tab, you may need to **modify your listing rules** to allow your products to be eligible.

**Note:** If you have listings in process, the number of listings will display in a message above the tabs.

Amazon SKU	ASIN	Product Listing Name	Condition	Landed Price	Amazon Quantity	Action
B00TE8XK15	B00TE8XK15	Polaroid ZIP Wireless Mobile Photo Mini Printer	New	Update in progress	2332	Select
B007Z0B812	B007Z0B812	Sony CDXG3100UP CD Single with Mega Bass Dynamic Amp- Black (Discontinued by Manufacturer)	New	Update in progress	3939	Select
B00UZU240Y	B00UZU240Y	Fujifilm instax Mini 8 Instant Camera (With Raspberry)	New	Update in progress	2961	Select
B00UCZG565	B00UCZG565	Samsung EP-PG920IBUGUS Wireless Charging Pad with 2A Wall Charger, Retail Packaging, Black Sapphire	New	Update in progress	5524	Select
B00V4EG6D6	B00V4EG6D6	HeroNeo	New	Update in progress	4163	Select
B00V9JP8EE	B00V9JP8EE	InnoGear 100ml Aromatherapy Essential Oil Diffuser Portable Ultrasonic Cool Mist Aroma Humidifier with Color LED Lights Changing and Waterless Auto Shut-off Function for Home Office Bedroom Room	New	Update in progress	6222	Select

*Ineligible Listings*

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

### Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.

## Default Columns (cont.)

COLUMN	DESCRIPTION
ASIN	<p>A unique block of 10 letters and/or numbers that identify items.</p> <p>ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.</p>
Product Listing Name	The name of the product.
Condition	The condition of the product.
Landed Price	The listing price for the product plus its shipping price.
Amazon Quantity	The quantity available once the product is actively listed on Amazon.
Action	<p>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options:</p> <ul style="list-style-type: none"><li><a href="#">View Details</a></li><li><a href="#">Create Override</a></li><li><a href="#">Edit Assigned ASIN</a></li><li><a href="#">Create Alias Seller SKU</a></li><li><a href="#">Switch to Fulfilled By Amazon/Merchant</a></li><li><a href="#">End Listing</a></li></ul>

## Ended Listings

The Ended Listings tab displays all the Amazon products that have been manually ended (removed) from your Amazon Seller Central account. These products meet all of the listing requirements and can be republished at any time and do not require additional information. If a product is in the Ineligible Listings tab, you may need to modify your [listing settings](#) to so that your product meets listing eligibility.

**Note:** If you have listings in process, the number of listings will display in a message above the tabs

### To manually end a single or multiple Amazon listings

1. Locate the listing(s) you want to end on the Inactive, Active, or Ineligible tab.
2. In the left-side column, tap to check each of the listings you wish to end.
3. In the Action drop-down, tap **End listing(s) on Amazon**.
4. Tap **OK** on the confirmation message that displays.

### To manually end a single Amazon listing

1. Locate the listing you want to end on the Inactive, Active, or Ineligible tab.
2. In the Action column for the listing, tap **Select** and tap **End Listing**
3. Tap **OK** on the confirmation message that displays.

When ending a listing, a confirmation message displays that the selected listing is being processed to end. Ended listings can be managed on Ended tab in Manage Listings. Once processed and removed from Amazon, the status for the listing will display as "Manually Ended.". Ended listings will remain removed from Amazon until you manually republish the listing using the Republish to Amazon action.

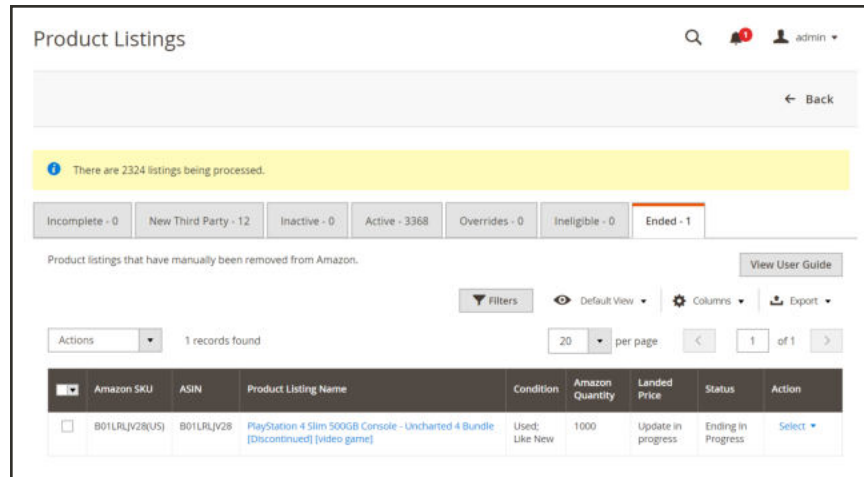
### To republish a single or multiple Amazon listing(s) that has been ended

1. In the left-side column, tap to check each of the listings you wish to republish.
2. In the Action drop-down, tap **Publish Product to Amazon**.
3. Tap **OK** on the confirmation message that displays.

### To republish a single Amazon listing that has been ended

1. In the Action column for the listing, tap **Select** and tap **End Listing**.
2. Tap **OK** on the confirmation message that displays.

A confirmation message will display that the selected listing is being processed to publish.



### Ended Listings

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

### Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items.  ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Product Listing Name	The name of the product.
Condition	The condition of the product.
Landed Price	The listing price for the product plus its shipping price.
Amazon Quantity	The quantity available once the product is actively listed on Amazon.

## Default Columns (cont.)

COLUMN	DESCRIPTION
Status	The status of the listing, defined by Amazon.
Action	List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <b>Select</b> to display your options: <a href="#">View Details</a> <a href="#">Publish on Amazon</a> <a href="#">Create Alias Seller SKU</a>

## Managing Product Listings by Action

The Product Listings screen contains several tabs from which you can view the statuses of all of your listings as well as match your products to Amazon listings.

Each tab differs slightly in the tasks available in the **Actions** drop-down, the **Select** (Action column) drop-down, and the default and available table columns, but the **workspace controls** are the same and allow you to customize the data that is displayed.

The **Actions** drop-down options can apply the selected action to all listings selected (checked), while options in the **Select** drop-down in the **Action** column apply the action only to the individual listing.

### Manage Listings by Status / Tab

#### Product Listings Actions

ACTION	DESCRIPTION	TAB(S)
Re-attempt auto match to Amazon Listing	Used to move the incomplete products back through the matching process. To attempt rematch, you must modify your <b>Listing</b> and <b>Catalog Search</b> settings to increase the potential for automatic matching.	<ul style="list-style-type: none"><li>• <b>Incomplete</b></li></ul>
<a href="#">Update Required Info</a>	Manually match your catalog products to Amazon listings by selecting a listing to match, entering an ASIN to match, or assigning a missing condition.	<ul style="list-style-type: none"><li>• <b>Incomplete</b></li></ul>
<a href="#">View Details</a>	View additional information on your active products, including the Listing Activity Log which displays the changes on an individual SKU / Product.	<ul style="list-style-type: none"><li>• <b>Incomplete</b></li><li>• <b>New Third Party</b></li><li>• <b>Ready to List</b></li></ul>



## Product Listings Actions (cont.)

ACTION	DESCRIPTION	TAB(S)
		<ul style="list-style-type: none"> <li>• Inactive</li> <li>• Active</li> <li>• Overrides</li> <li>• Ineligible</li> <li>• Ended</li> </ul>
Create New Catalog Product(s)	Create a new Magento catalog product using the information imported with the Amazon listing.	<ul style="list-style-type: none"> <li>• New Third Party</li> </ul>
Attempt Automatic Match	Attempt an automatic match between your Magento catalog and your Amazon listings based on the search criteria settings. To attempt rematch, you must modify your Listing and Catalog Search settings to increase the potential for automatic matching.	<ul style="list-style-type: none"> <li>• New Third Party</li> </ul>
Assign Catalog Product	Manually select a product that already exists in your Magento catalog and assign it to the Amazon listing.	<ul style="list-style-type: none"> <li>• New Third Party</li> </ul>
Create New Catalog Product	Create a new Magento catalog product using the information imported with the Amazon listing.	<ul style="list-style-type: none"> <li>• New Third Party</li> </ul>
Publish Product to Amazon	(Mass action) Used to re-list an listing that has been ended or to manually list a product that meets your listing rules eligibility, but your Product Listing Actions is not set to "Automatically list new products."	<ul style="list-style-type: none"> <li>• Ready to List</li> <li>• Ended</li> </ul>
Publish On Amazon	(Single listing action) Used to re-list an listing that has been ended or to manually list a product that meets your listing rules eligibility, but your Product Listing Actions is not set to "Automatically list new products."	<ul style="list-style-type: none"> <li>• Ready to List</li> <li>• Ended</li> </ul>
End Listing(s) on	(Mass action) Used to manually end and	<ul style="list-style-type: none"> <li>• Inactive</li> </ul>

## Product Listings Actions (cont.)

ACTION	DESCRIPTION	TAB(S)
Amazon	remove listings for your products that exist on Amazon. Ended listings can be re-listed as long as they meet your listing rules eligibility.	<ul style="list-style-type: none"> <li>• Active</li> <li>• Ineligible</li> </ul>
Edit Listing Overrides	(Mass action) Manually edit an existing "override" that will set the price, handling time, condition, and seller notes text for an individual listing, ignoring other listing defaults, settings, and rules.	<ul style="list-style-type: none"> <li>• Inactive</li> <li>• Active</li> <li>• Overrides</li> <li>• Ineligible</li> </ul>
Create Override	Manually create an "override" that will set the price, handling time, condition, and seller notes text for an individual listing, ignoring other listing defaults, settings, and rules.	<ul style="list-style-type: none"> <li>• Inactive</li> <li>• Active</li> <li>• Ineligible</li> </ul>
Edit Assigned ASIN	Used if the ASIN matched to your catalog product needs to be modified (example: if the product was matched to the wrong listing ASIN).	<ul style="list-style-type: none"> <li>• Inactive</li> <li>• Active</li> <li>• Ineligible</li> </ul>
Create Alias Seller SKU	<p>Can serve two functions:</p> <ul style="list-style-type: none"> <li>• Can be used to create a 1-to-2 relationship between your catalog product and two Amazon listings. Example: Amazon has the product listed with different ASIN values. You can match your one catalog product to both ASIN listings for the product.</li> <li>• Can be used to control a listing in different Amazon regions. Example: You have a catalog product that has different shipping methods defined based on the Amazon region (US region is FBA and Canada region is FBM). To control stock/quantity, you can create an alias seller SKU and relist the same product in that region with a different Seller SKU.</li> </ul>	<ul style="list-style-type: none"> <li>• Inactive</li> <li>• Active</li> <li>• Ineligible</li> <li>• Ended</li> </ul>
Switch to Fulfilled by	Used to modify the fulfillment method	<ul style="list-style-type: none"> <li>• Inactive</li> </ul>

## Product Listings Actions (cont.)

ACTION	DESCRIPTION	TAB(S)
Amazon/Merchant	associated with your product (Fulfilled by Amazon: FBA or Fulfilled by Merchant: FBM).	<ul style="list-style-type: none"><li>• Active</li><li>• Ineligible</li></ul>
<b>End Listing</b>	(Single listing action) Used to manually end and remove listings for your products that exist on Amazon. Ended listings can be re-listed as long as they meet your listing rules eligibility.	<ul style="list-style-type: none"><li>• Inactive</li><li>• Active</li><li>• Ineligible</li></ul>
<b>Edit Overrides</b>	(Single listing action) Manually edit an existing "override" that will set the price, handling time, condition, and seller notes text for an individual listing, ignoring other listing defaults, settings, and rules.	<ul style="list-style-type: none"><li>• Overrides</li></ul>

# Creating and Assigning Products

When viewing New Third Party tab during onboarding or when managing your listings, you can match your Magento catalog products to an existing Amazon listing. There are two options for this matching. You can assign a listing to an existing catalog product, or you can use the information from the listing to create new catalog products. These options are helpful when your Amazon listings do not automatically match to your Magento catalog.

Assigning (or matching) your products to your Amazon listings is necessary to use the full feature set of Amazon Sales Channel.

When you create a new catalog product from an Amazon listing:

- The ASIN becomes the Magento SKU
- The Product Listing Name becomes the Catalog Listing Name
- The Price and Quantity are taken from the Amazon Listing

The rest of the necessary settings are determined by the Magento product settings you select during creation.

Once created and matched, the listings remove from the New Third Party tab and display on the Active tab.

## To assign a single catalog product to an Amazon listing

1. View your product listings on the New Third Party tab.
2. Find the listing you wish to assign/match in the list and tap **Select** in the Action column. Then tap **Assign Catalog Product**. The Assign Magento Catalog Product screen displays.
3. Browse for or filter the list using the **workspace controls** and locate the appropriate catalog product to match to the listing.
4. When the correct product is located in the list, tap **Assign Catalog Product** in the Action column.

Your product and listing are now matched. Amazon Sales Channel can now share product and listing data with Amazon and manage your listing and its information, including listing price, shipping price, stock/quantity, order information and status, and more.

## To create a single catalog product using the Amazon listing information

1. View your product listings on the New Third Party tab.
2. Find the listing you wish to create in your Magento catalog and tap **Select** in the Action column. Then tap **Create New Catalog Product**. The Create Magento Catalog Product screen displays.
3. Complete the catalog settings for the product.
  - a. Set the **Enable Product(s)** toggle to Yes or No (required).

**Yes:** Select this option to make the product eligible for your Magento storefront sales.

**No:** Select this option to make the product ineligible for your Magento storefront sales.

1. For **Categories**, assign a category for the product (optional).

Tap the drop-down arrow and tap a category checkbox to select the product's category. Tap **Done** when finished.

2. For **Website Ids**, select the website (storefront) for which the product to be associated.

The options in this list are dependent on your Magento **store configuration** settings.

3. For **Attribute Set Id** (required), select an option in the drop-down.

"Default" is the default selection. The options in this list are dependent on your Magento **attribute sets** you have configured.

4. For **Visibility**, select an option for the new product in the drop-down.

**Not Visible Individually** (default): The product is not included in your storefront listings, although it might be available as a variation of another product.

**Catalog:** The product displays in your catalog listings.

**Search:** The product is available for search operations.

**Catalog and Search:** The product is included in catalog listings and available for search operations.

5. For **Assign Tax Class**, select an option for the product in the drop-down.

The options that display in this list are dependent on the **tax classes** you have configured.

6. When complete, tap **Create Catalog Products**.

The catalog product is created in your Magento catalog, and assigned to the Amazon listing from which it was created. With the listing now matched to an existing Amazon listing, the listing will remove from the New Third Party tab and display in the Active tab.

## To create a multiple catalog products using their Amazon listing information

1. View your product listings on the New Third Party tab.
2. Select the listings for which to create catalog products.

You can tap individual checkboxes in the left-side column or you can tap the drop-down arrow in the top-left column and choose **Select All** or **Select All on this Page**.

3. Tap the **Actions** field. Then tap **Create New Catalog Product(s)**.
4. Tap **OK** to accept the confirmation message. The Create Magento Catalog Product screen displays.
5. Complete the catalog settings for the products.

When creating catalog products for multiple selected listings, the product settings entered are applied to all the listings.

- a. Set the **Enable Product(s)** toggle to Yes or No (required).

**Yes:** Select this option to make the product eligible for your Magento storefront sales.

**No:** Select this option to make the product ineligible for your Magento storefront sales.

7. For **Categories**, assign a category for the product (optional).

Tap the drop-down arrow and tap a category checkbox to select the product's category. Tap **Done** when finished.

8. For **Website Ids**, select the website (storefront) for which the product to be associated.

The options in this list are dependent on your Magento **store configuration** settings.

9. For **Attribute Set Id** (required), select an option in the drop-down.

"Default" is the default selection. The options in this list are dependent on your Magento **attribute sets** you have configured.

10. For **Visibility**, select an option for the new product in the drop-down.

**Not Visible Individually** (default): The product is not included in your storefront listings, although it might be available as a variation of another product.

**Catalog:** The product displays in your catalog listings.

**Search:** The product is available for search operations.

**Catalog and Search:** The product is included in catalog listings and available for search operations.

11. For **Assign Tax Class**, select an option for the product in the drop-down.

The options that display in this list are dependent on the **tax classes** you have configured.

12. When complete, tap **Create Catalog Products**.

The catalog products are created in your Magento catalog and assigned to the Amazon listing from which it was created. With the listings now matched to their respective Amazon listing, the listings will remove from the New Third Party tab and display in the Active tab.

*Create Magento Catalog Product*

## Field Descriptions

FIELD	DESCRIPTION
Enable Product(s)	(Required) If enabled, the product will be visible in your Magento storefront; if disabled, the product will not show in your Magento storefront.
Categories	You can enter the name of the category for your new product or select a category by tapping the drop-down arrow to display your options. Options are dependent on your <b>categories</b> configuration.
Website Ids	(Required) Select the website (storefront) for which the product to be associated. Options are dependent on your Magento <b>store configuration</b> settings
Attribute Set Id	Select an attribute set from the drop-down. Options are dependent on your configured Magento <b>attribute sets</b> .
Visibility	Options:  Not Visible Individually: The product will not be visible in your Magento storefront. This is the visibility usually assigned to variant products.  Catalog: Allows the product to be accessed through the category it is associated to within the website.

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<p>Search: Allows the product to only be found through the search tool.</p> <p>Catalog and Search: Allows the products to be accessed through the category structure and by using the search tool.</p>
Assign Tax Class	<p>Assign a tax class to the new product from the drop-down. Options are dependent on your configured <b>tax classes</b>.</p>



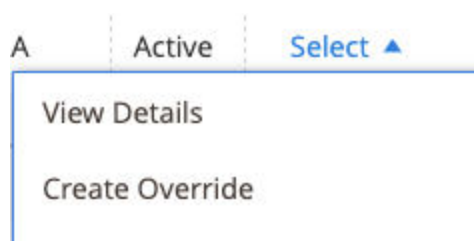
## Creating and Editing Overrides

You can create and override for a listing or edit or remove an override that has been applied to a listing. Overrides set a defined value for a specific listing.

### To Create an Override for a Single Listing

The **Create Override** action is available when viewing listings on the Inactive, Active, and Ineligible tabs.

1. View a listing on a Products Listings tab.
2. In the Action column, tap **Select** and then tap **Create Override**. The Product Listing Overrides screen displays.



3. Verify the Listing Details to ensure you are viewing the correct listing.
4. You can define a single override type or any combination of types for the listing (Price, Handling Time, Condition, Seller Notes).
  - **Price:** Tap the **Change Listing Price** radio button. Enter your defined price value in the **Price Override** field.
  - **Handling Time:** Tap the **Change Handling Time** radio button. Enter the defined time value (in days) in the **Handling Time Override** field.
  - **Condition:** Tap the **Change Condition** radio button. Select the correct option in the **Condition Override** drop-down.
  - **Seller Notes:** Tap the **Change Seller Notes** radio button. Enter your notes text in the **Seller Notes Override** field.
5. Tap **Save Listing Override**.

The Product Listing Overrides screen closes. The status of the listing changes to "Relist in Progress." The change will be published to Amazon with your next data sync (as configured in your cron settings). The listing is also added to the Overrides tab.

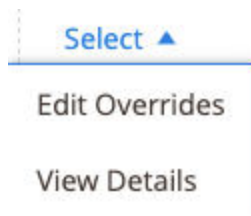
The following example screen shows an override that defines a new price of \$55, a new handling time of 1 day, a new condition of "Used; Like New," and new Seller Note text.

*Create an Override*

## To Edit or Remove an Override for a Single Listing

The **Edit Overrides** action is available when viewing listings on the Overrides tab.

1. View a listing on a Products Listings tab (Inactive, Active, Overrides, or Ineligible).
2. In the Action column, tap **Select** and then tap **Edit Overrides**. The Product Listing Overrides screen displays just as when creating an override.



3. Verify the Listing Details to ensure you are viewing the correct listing.

4. To keep an override type the same, ensure the **No Change To** radio button selected for the type. This is the default setting. Selecting this option leaves the previously defined override value unchanged.
5. To edit your override settings, define the sections for the type you want to change (Price, Handling Time, Condition, Seller Notes).
  - **Price:** Tap the **Change Listing Price** radio button. Enter your defined price value for **Price Override**.
  - **Handling Time:** Tap the **Change Handling Time** radio button. Enter the defined time value (in days) for **Handling Time Override**.
  - **Condition:** Tap the **Change Condition** radio button. Select the correct option for **Condition Override**.
  - **Seller Notes:** Tap the **Change Seller Notes** radio button. Enter your notes text for **Seller Notes Override**.
6. To remove an override type, tap the **Remove** radio button for each of the types you want to remove. If not removed, the previously defined value remains in the override.
7. Tap **Save Listing Override**.

The Product Listing Overrides screen closes. The status of the listing changes to "Relist in Progress." The change will be published to Amazon with your next data sync (as configured in your cron settings). If not already listed, the listings are also added to the Overrides tab.

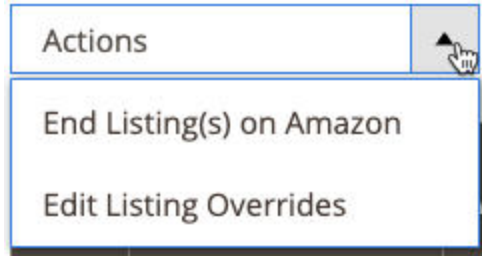
Piggybacking on the Create an Override example. The following example screen shows an edit to the previously created override that defines a new price of \$50, removes the Handling Time override, and keeps the previous Condition and Seller Notes overrides.

*Editing or Removing an Override*

## To Edit or Remove an Override for Multiple Listings

The **Edit Listing Overrides** action is available in the Actions drop-down when viewing listings on the Inactive, Active, Overrides, and Ineligible tabs.

1. View the listing on a Products Listings tab (Inactive, Active, Overrides, or Ineligible).
2. Tap the checkbox in the left-side column to select each of the listings you want to modify.
3. In the Actions drop-down, tap **Edit Listing Overrides**. The Product Listing Overrides screen displays just as when creating an override.



Because you are modifying overrides for multiple listings, the Listing Details section does not display as it does when modifying a single listing.

4. To keep an override the same, ensure the **No Change To** radio button selected for the type. "No Change To" is the default setting. Selecting this option leaves the previously defined override value unchanged.
5. To edit your override settings, define the sections for the type you want to change (Price, Handling Time, Condition, Seller Notes).
  - **Price:** Tap the **Change Listing Price** radio button. Enter your defined price value for **Price Override**.
  - **Handling Time:** Tap the **Change Handling Time** radio button. Enter the defined time value (in days) for **Handling Time Override**.
  - **Condition:** Tap the **Change Condition** radio button. Select the correct option for **Condition Override**.
  - **Seller Notes:** Tap the **Change Seller Notes** radio button. Enter your notes text for **Seller Notes Override**.
6. To remove an override type, tap the **Remove** radio button for each of the types you want to remove. If not removed, the previously defined value remains in the override.
7. Tap **Save Listing Override**.

The Product Listing Overrides screen closes. The status of the listings changes to "Relist in Progress." The change will be published to Amazon with your next data sync (as configured in your cron settings). If not already listed, the listings are also added to the Overrides tab.

### Override Types

OVERRIDE	DESCRIPTION
Price Override	<p>A price override defines the price for the listings. This override takes priority over all automated settings until the override is removed.</p> <p>To override the price of your product, select the <b>Change Listing Price</b> radio button and then enter the new price in the Price Override field.</p>

## Override Types (cont.)

OVERRIDE	DESCRIPTION
Handling Time Override	<p>A handling time override defines the time it takes (in days) to process and ship products. A handling time override takes priority over all automated and default handling time settings until the override is removed.</p> <p>The value that exists in the Handling Time Override box is either your default handling time defined in your <b>listing settings</b> or your defined override handling time. If you remove a handling time override, the listing will default to the handling time defined in your listing settings.</p> <p>To define a handling time override, select the <b>Change Handling Time</b> radio button, and then enter the new handling time (in days) in the Handling Time Override field.</p>
Condition Override	<p>To override the Listing Condition, select the <b>Change Condition</b> radio button and then select the new condition from the Condition Override drop-down.</p>
Seller Notes Override	<p>For products in your catalog that are defined with a condition other than "New," a seller note can be added to further detail your product and its condition to potential buyers. You can enter a seller note override for a "New" condition product, but Amazon will not display the note.</p> <p>To override the Seller Notes, select the <b>Change Seller Notes</b> radio button and then enter the new note in the Seller Notes Override field.</p>

## Creating an Alias Amazon Seller SKU

An Alias Amazon Seller SKU is used to create a new Amazon listing from same product in your Magento catalog. If you are an experienced Amazon seller, you may be familiar with the [Amazon Global SKU](#) and Marketplace-specific SKU for inventory and shipping. Following similar principles for Amazon Sales Channel, the Amazon Seller SKU controls product listing information at multi-regional level, and the Alias Amazon Seller SKU can be used to control product listing information at a region-specific level.

This function can be used to perform two functions:

- Create an Alias Amazon Seller SKU for one of your Magento catalog products to control region-specific listing information

**Example:** You are a seller in both the US and the Canada regions. Remember, each of your Amazon Sales Channel stores can only be assigned one Amazon region during setup. This means that you have an Amazon Sales Channel store with a defined US region and another store with a defined Canada region. Both stores share your Magento catalog for listing information across both regions, including the Amazon Seller SKU and ASIN product attributes. So, listings for the catalog product would be the same in both stores, sharing pricing, stock/quantity, and other product attributes. But, your stock for your Canada store ships from a Canada location, and your US store ships from a US location. Thus, you need to control the listing quantity for the listing separately for each store. To accomplish this type of region-specific control, you can create an Alias Amazon Seller SKU.

Essentially, you can create an Alias Amazon Seller SKU that is linked to the same catalog product and can be used to republish the same listing in that region.

- Create an Alias Amazon Seller SKU and match one of your Magento catalog products to two Amazon listings

**Example:** You have a catalog product that is matched to an Amazon listing. As Amazon frequently has multiple listings that represent the same product, you discover another Amazon listing for the same product, but Amazon has assigned a different ASIN to the listing. To increase your product visibility to include, you want to match your catalog product to the different ASIN and create listings for both ASIN values. To accomplish this, you can create an Alias Amazon Seller SKU.

Essentially, you can create an Alias Amazon Seller SKU that can be used to match a single catalog product to a second Amazon listing and create a new listing for the newly matched ASIN. In this scenario, you would have two Amazon listings for the same catalog product.

After you've created an Alias Amazon Seller SKU, you can use your listing settings, rules, and overrides to control the listing information for the region. Product attributes that can be defined per region for a listing include quantity/stock, fulfillment method, condition, product eligibility, and handling time.

## To create an Alias Amazon Seller SKU to be used for a region-specific purpose

1. View the listing in one of the Product Listing screens (Inactive, Active, Ineligible, or Ended).

2. In the Action column, tap **Create Alias Seller SKU**.

3. For **Assign New Seller SKU**, enter a unique alphanumeric value.

This must be a unique value not used for any other product or alias in your catalog.

4. For **Assign New ASIN**, make no change.

This value auto-populates with the ASIN that is matched to your catalog product. Changing this value will match your catalog product to two Amazon listings based on the ASIN.

5. Toggle the Remove Existing Seller SKU option to Yes or No.

**Yes:** Select this option to delete the listing and create a new listing using the new information provided.

**No:** Select this option to create a new listing and keep the old listing unchanged.

6. Tap **Save Listing Update**.

## To create an Alias Amazon Seller SKU to be used to match a single catalog product to two Amazon listings

1. View the listing in one of the Product Listing screens (Inactive, Active, Ineligible, or Ended).

2. In the Action column, tap **Create Alias Seller SKU**.

3. For **Assign New Seller SKU**, enter a unique alphanumeric value.

This must be a unique value not used for any other product or alias in your catalog.

4. For **Assign New ASIN**, enter a unique alphanumeric value.

This value auto-populates with the ASIN that is matched to your catalog product. Changing this value will match your catalog product to two Amazon listings based on the ASIN.

5. Toggle the Remove Existing Seller SKU option to Yes or No.

**Yes:** Select this option to delete the listing and create a new listing using the new information provided.

**No:** Select this option to create a new listing and keep the old listing unchanged.

6. Tap **Save Listing Update**.



The screenshot shows a web form titled "Create An Alias Amazon Seller SKU". At the top right, there are navigation icons and a user profile "acarscaden". Below the title, there are "Back" and "Save Listing Update" buttons. A descriptive text states: "Provides the ability to create a new Amazon listing from the same catalog product" with a "View User Guide" link. The form displays "Current Seller SKU: B01LRLJV28(US)" and "Amazon Listing Name: PlayStation 4 Slim 500GB Console - Uncharted 4 Bundle [Discontinued] [video game]". There are three main sections: "Assign New Seller SKU" with a text input containing "71288834341" and a note "Must be unique and cannot be used in another listing."; "Assign New ASIN" with a text input containing "B01LRLJV28" and a note "This may be edited to an alternate Amazon ASIN."; and "Remove Existing Seller SKU" with a radio button selected to "Yes" and a note "This will remove the original Seller SKU from Amazon."

*Create an Alias Amazon Seller SKU*

## Field Descriptions

FIELD	DESCRIPTION
Assign New Seller SKU	Enter a new, unique alphanumeric value to be linked to the original Amazon Seller SKU. This number is only used by Amazon Sales Channel to match to your catalog product. You can use any SKU value, but the value can only be used once in your catalog.
Assign New ASIN	Enter the ASIN value for the listing to which you want to match your catalog product. Only modify this field when matching a single catalog product to the ASIN for another listing for the same product. This value must match the ASIN assigned by Amazon or the listing will not be rejected by Amazon.
Remove Existing Seller SKU	Options:  <b>Yes:</b> Select this option to delete the listing and create a new listing using the new information provided. The new listing will display in the Active tab, and the old listing will move to the Ended tab.  <b>No:</b> Select this option to create a new listing and keep the old listing unchanged. Both listings will display in the Active tab once the new listing is created.

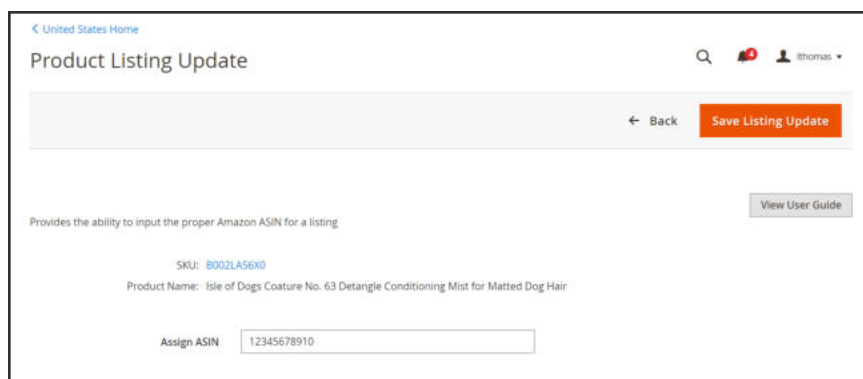
## Edit an Assigned ASIN

You can edit the Amazon ASIN value assigned to a product in your Magento catalog. This is a helpful feature if a catalog product was improperly matched to one of your Amazon listings. Changing the assigned ASIN for the listing does not change the ASIN assigned to a product by Amazon. It only changes the Amazon listing to which your catalog product is matched.

When an assigned ASIN is changed, Magento ends your Amazon listings attached to the old ASIN, validates the ASIN with Amazon, creates a new listing for the updated ASIN, and updates listing information in Amazon Sales Channel.

### To edit an assigned ASIN

1. View the listing in one of the Product Listing screens (Inactive, Active, or Ineligible).
2. In the Action column, tap **Edit Assigned ASIN**. The Product Listing Update screen displays.
3. Enter the new ASIN value in the **Assign ASIN** field.
4. Tap **Save Listing Update** to save your changes.



*Edit Assigned ASIN*

## Ending an Amazon Listing

### To manually end a single or multiple Amazon listings

1. View the listing(s) on the **Active** tab in **Managing Listings**.
2. In the left-side column, tap to check each of the listings you wish to end.
3. In the Actions drop-down, tap **End listing(s) on Amazon**.
4. Tap **OK** on the confirmation message that displays.

## To manually end a single Amazon listing

1. View the listing on the **Active** tab in [Managing Listings](#).
2. In the Action column for the listing, tap **Select** and tap **End Listing**.
3. Tap **OK** on the confirmation message that displays.

When ending a listing, a confirmation message displays that the selected listing is being processed to end. Ended listings can be managed on the **Ended** tab in Manage Listings. Once processed and removed from Amazon, the status for the listing will display as "Manually Ended." Ended listings will remain removed from Amazon until you manually republish the listing using the Republish to Amazon action.

## Update Required Info (Incomplete Listing)

Listings that display on the Incomplete tab include your Magento catalog products that meet your Amazon eligibility requirements as defined in your listing rules but are missing information required by Amazon before listing.

### To update required info (Unable to Assign To Amazon Listing)

1. View the listing(s) on the Incomplete tab in [Manage Listings](#).
2. In the Action column for the listing, tap **Select** and tap **Update Required Info**.
3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.
4. For **Assign ASIN**, enter the ASIN assigned by Amazon for the listing you want to match to the catalog product displayed.
5. Tap **Save Listing Update** to save the product match.

The listing is now matched to your catalog, and the listing will be updated and published to Amazon based on your cron and listing settings. The listing will move from the Incomplete tab.

*Example: Manually assign ASIN for no listing match*

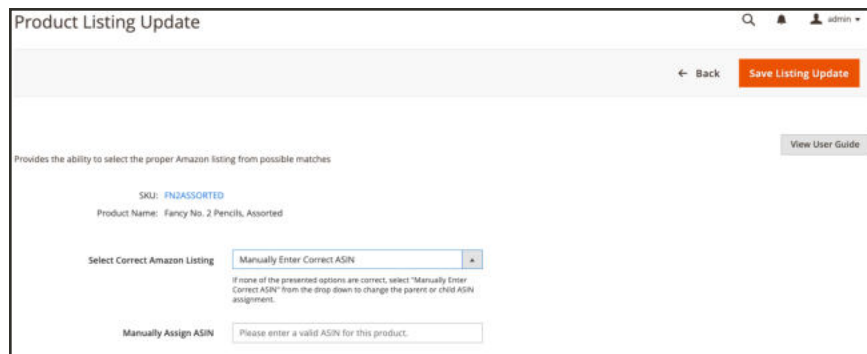
## To update required info (Multiple Matches Found)

1. View the listing(s) on the Incomplete tab in [Manage Listings](#).
2. In the Action column for the listing, tap **Select** and tap **Update Required Info**.
3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.
4. For **Select Correct Amazon Listing**, select the correct ASIN for the listing you wish to match to this product.

Catalog products that are identified as possible matches will display in the drop-down.

If none of the displayed options are correct, you can select "Manually Enter Correct ASIN" and manually enter the ASIN for the product.

5. If entering the ASIN manually, enter the correct ASIN for **Manually Assign ASIN**.
6. Tap **Save Listing Update** to save the product match.



The screenshot shows a mobile application interface titled "Product Listing Update". At the top right, there are icons for search, notifications, and a user profile labeled "admin". Below the title bar, there are "Back" and "Save Listing Update" buttons. The main content area contains the following information:

- SKU: FNZASSORTED
- Product Name: Fancy No. 2 Pencils, Assorted
- A "View User Guide" button.
- A "Select Correct Amazon Listing" section with a dropdown menu currently showing "Manually Enter Correct ASIN". Below the dropdown is a small text box: "If none of the presented options are correct, select 'Manually Enter Correct ASIN' from the drop down to change the parent or child ASIN assignment."
- A "Manually Assign ASIN" section with a text input field containing the placeholder text "Please enter a valid ASIN for this product."

*Example: Manually select ASIN from multiple possible matches*

## To update required info (Has Variants)

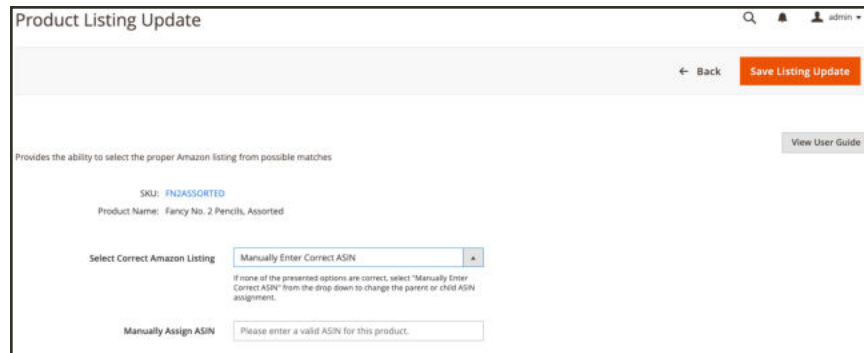
1. View the listing(s) on the Incomplete tab in [Manage Listings](#).
2. In the Action column for the listing, tap **Select** and tap **Update Required Info**.
3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.
4. For **Select Correct Amazon Listing**, select the correct ASIN for the listing you wish to match to this product.

Catalog products that are identified as possible matches will display in the drop-down.

If none of the displayed options are correct, you can select "Manually Enter Correct ASIN" and manually enter the ASIN for the product.

5. If entering the ASIN manually, enter the correct ASIN for **Manually Assign ASIN**.

6. Tap **Save Listing Update** to save the product match.

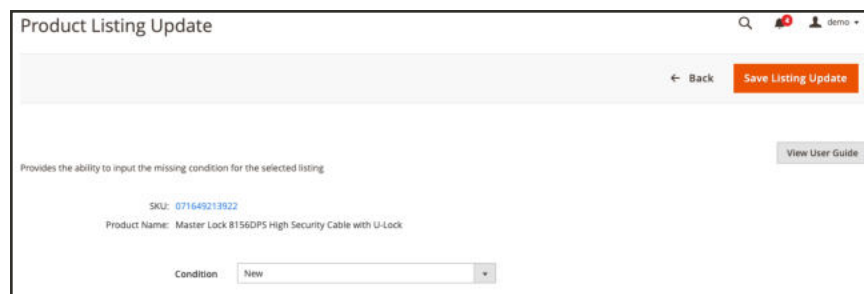


The screenshot shows the 'Product Listing Update' interface. At the top, there is a search icon, a notification bell, and a user profile icon labeled 'admin'. Below this is a navigation bar with a 'Back' arrow and a 'Save Listing Update' button. The main content area has a sub-header 'Provides the ability to select the proper Amazon listing from possible matches' and a 'View User Guide' link. The product information is displayed as: SKU: FN2ASSORTED, Product Name: Fancy No. 2 Pencils, Assorted. There are two input sections: 'Select Correct Amazon Listing' with a dropdown menu currently showing 'Manually Enter Correct ASIN', and 'Manually Assign ASIN' with a text input field containing the placeholder 'Please enter a valid ASIN for this product.' A small note below the dropdown explains that if none of the presented options are correct, the user should select 'Manually Enter Correct ASIN' to change the parent or child ASIN assignment.

*Example: Manually select ASIN from possible variant matches*

### To update required info (Missing Condition)

1. View the listing(s) on the Incomplete tab in **Manage Listings**.
2. In the Action column for the listing, tap **Select** and tap **Update Required Info**.
3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.
4. For **Condition**, select the appropriate condition in the drop-down. The list of options available is dependent on your **Product Listing Condition** settings.
5. Tap **Save Listing Update** to save the product match.



The screenshot shows the 'Product Listing Update' interface. At the top, there is a search icon, a notification bell, and a user profile icon labeled 'demo'. Below this is a navigation bar with a 'Back' arrow and a 'Save Listing Update' button. The main content area has a sub-header 'Provides the ability to input the missing condition for the selected listing' and a 'View User Guide' link. The product information is displayed as: SKU: 071649213922, Product Name: Master Lock 8156DP5 High Security Cable with U-Lock. There is a 'Condition' dropdown menu currently set to 'New'.

*Example: Manually update missing condition*

## View Listing Details

The Product Listing Details page provides additional information on your active products, including the Listing Activity Log which displays the changes on an individual SKU / Product. This information can help you understand competitive metrics on your products and on individual SKU/product changes.

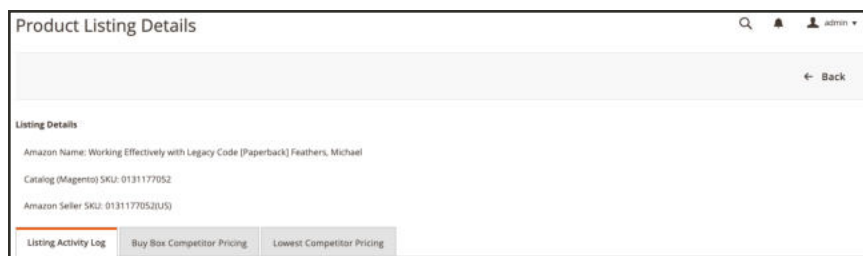
- **Listing Details:** Product details including the Name and Amazon Seller SKU.
- **Listing Activity Log:** Historical record of all the changes that have occurred for this listing, such as pricing and quantity/stock changes. No further actions are required. This is provided for review to understand the change history.
- **Buy Box Competitor Pricing:** This displays data on Amazon's **Buy Box** status and competitor pricing.
- **Lowest Competitor Pricing:** This displays the lowest Amazon competitor's pricing and feedback information.

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

### Listing Details

Displays product information includes:

- Amazon Name
- Catalog (Magento) SKU
- Amazon Seller SKU



*Listing Details*

### Listing Activity Log

Displays all recent activity for the Amazon listing. Information displayed includes:

- Amazon Seller SKU: Identifies the Stock Keeping Unit (SKU) defined for the listing.
- ASIN: Identifies the 10-digit Amazon product identifier.

- Listing Action: Identifies the type of action that occurred for the listing.
- Comments: Provides additional details related to the type of listing action that occurred.
- Executed At: Identifies the date and time the action occurred.

The screenshot shows the 'Listing Activity Log' interface. It has three tabs: 'Listing Activity Log', 'Buy Box Competitor Pricing', and 'Lowest Competitor Pricing'. Below the tabs, it says 'Displays all recent activity on this particular Amazon listing'. There are controls for filters, default view, and columns. It indicates '34 records found' and '20 per page'. The table below has the following data:

Amazon Seller SKU	ASIN	Listing Action	Status	Comments	Executed At
0131177052US	0131177052	Pricing		Updated to 84.56	Apr 5, 2019 10:01:05 PM
0131177052US	0131177052	Pricing		Updated to 84.56	Apr 5, 2019 6:58:05 PM
0131177052US	0131177052	Pricing		Updated to 89.10	Apr 5, 2019 2:01:05 PM
0131177052US	0131177052	Pricing		Updated to 89.10	Apr 5, 2019 12:00:06 PM
0131177052US	0131177052	Pricing		Updated to 90.10	Apr 5, 2019 10:33:04 AM

*Product Listing Details: Listing Activity Log*

## Buy Box Competitor Pricing

Displays information for the Amazon merchant who holds the **Buy Box** position for the listing. This can be used to understand the price positioning of your competitors on Amazon. Information displayed includes:

- ASIN: The 10-digit Amazon product identifier.
- Is Seller: Identifies if you are the Buy Box seller. Options Yes/No.
- Condition: Identifies the condition defined for the listing.
- Listing Price: Identifies the price at which the listing was published.
- Shipping Price: Identifies the shipping price added to the listing.
- Landed Price: Identifies the listing price plus the shipping price for the listing.
- Last Updated: Identifies the date and time the pricing information was updated from Amazon.

The screenshot shows the 'Buy Box Competitor Pricing' interface. It has three tabs: 'Listing Activity Log', 'Buy Box Competitor Pricing', and 'Lowest Competitor Pricing'. Below the tabs, it says 'Displays the merchant and price whose listing holds the Buy Box on Amazon'. There are controls for filters, default view, and columns. It indicates '2 records found' and '20 per page'. The table below has the following data:

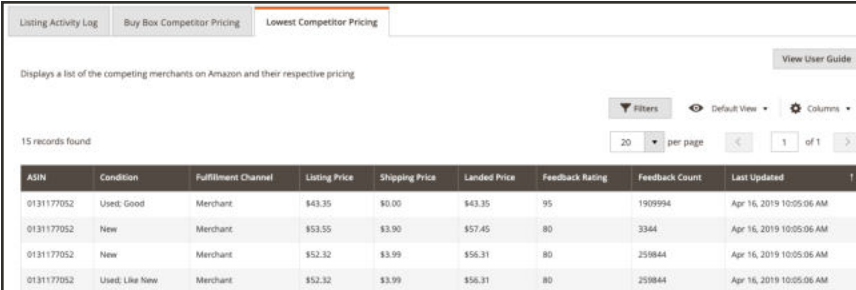
ASIN	Is Seller	Condition	Listing Price	Shipping Price	Landed Price	Last Updated
0131177052	No	Used: Good	\$43.35	\$0.00	\$43.35	Apr 16, 2019 10:05:06 AM
0131177052	No	New	\$47.72	\$0.00	\$47.72	Apr 16, 2019 10:05:06 AM

*Product Listing Details: Buy Box Competitor Pricing*

## Lowest Competitor Pricing

Displays information about Amazon competitors for the same listing. This can be used to understand the price positioning of your competitors on Amazon. Information displayed includes:

- ASIN: The 10-digit Amazon product identifier.
- Condition: Identifies the condition defined for the listing.
- Fulfillment Channel: Identifies the party responsible for fulfillment. Options: Merchant/Amazon.
- Listing Price: Identifies the price at which the listing was published.
- Shipping Price: Identifies the shipping price added to the listing.
- Landed Price: Identifies the listing price plus the shipping price for the listing.
- Feedback Rating: Identifies the Amazon feedback rating for the lowest price merchant.
- Feedback Count: Identifies the Amazon feedback count for the lowest price merchant.
- Last Updated: Identifies the date and time the pricing information was updated from Amazon.



The screenshot shows a web interface with three tabs: 'Listing Activity Log', 'Buy Box Competitor Pricing', and 'Lowest Competitor Pricing'. Below the tabs, there is a description: 'Displays a list of the competing merchants on Amazon and their respective pricing'. To the right, there are controls for 'Filters', 'Default View', and 'Columns'. Below these controls, it says '15 records found' and '20 per page'. The main content is a table with the following data:

ASIN	Condition	Fulfillment Channel	Listing Price	Shipping Price	Landed Price	Feedback Rating	Feedback Count	Last Updated
0131177052	Used: Good	Merchant	\$43.35	\$0.00	\$43.35	95	1909994	Apr 16, 2019 10:05:06 AM
0131177052	New	Merchant	\$53.55	\$3.90	\$57.45	80	3344	Apr 16, 2019 10:05:06 AM
0131177052	New	Merchant	\$52.32	\$3.99	\$56.31	80	259844	Apr 16, 2019 10:05:06 AM
0131177052	Used: Like New	Merchant	\$52.32	\$3.99	\$56.31	80	259844	Apr 16, 2019 10:05:06 AM

*Product Listing Details: Lowest Competitor Pricing*





## Managing Orders and Fulfillment

Amazon Sales Channel imports your Amazon Seller Central orders into Magento for review on the Orders tab in Amazon Sales Channel Home.

Orders that are imported:

- Orders that are in "Unshipped" status in your Amazon Seller Central account at the time of [store integration](#) during onboarding.
- All new orders in your Amazon Seller Central account after [store integration](#).

Orders that are not imported:

- Orders that existed in your Amazon Seller Central account at the time of [store integration](#) but were in a status other than "Unshipped."

An Amazon order is added to the to the Orders tab when Amazon Sales Channel receives information that Amazon has changed the order status from "Pending" to "Unshipped" in Amazon Seller Central. Amazon places an order in "Pending" status while the order and the payment method are verified. Remember, information sync depends on your cron settings and the time it takes Amazon to process information.

You can review your Amazon order information on the Orders tab.

If your [order settings](#) are defined to create a corresponding Magento order for your Amazon orders, you can manage your orders the same way you [process your Magento orders](#). If your [order settings](#) are set to not create corresponding Magento orders, you can review your order information on the Orders tab but must manage your orders in Amazon Seller Central.

When managing Amazon orders in Amazon Sales Channel, you will use the [Magento Order Management](#) processes and workflows. When you tap the Magento order number for the order, the order displays in a new tab the same as if you accessed the order in Sales grid in the admin panel.

### To view your Amazon order information:

1. On the Admin sidebar, tap **Marketing**. Then, under **Channels**, tap **Amazon**.
2. In Amazon Sales Channel Home, tap the **Orders** tab.
3. If you want to view additional details for an individual order, tap **View Amazon Order Details** in the Action column.

This displays the [Amazon Order Details](#) screen to view the details for the selected order.

4. If you want to manage an individual order, tap the number in the Magento Order Number column.

This displays the Magento **order processing** screen in a new tab.  
See **Common Order Processing Tasks**

Amazon Sales Channel Home

Amazon Stores | **Orders** | Attributes | Listing Changes Log | Communication Errors Log

Filters | Default View | Columns | Export

8 records found | 20 per page | 1 of 1

<input type="checkbox"/>	Amazon Order Number	Amazon Store Name	Magento Order Number	Buyer Name	Status	Total	Fulfillment Channel	Items Unshipped	Reserved	Purchase Date	Latest Ship Date	Last Action	Action
<input type="checkbox"/>	111-1071022-7108202	Go Cloud	000000001	Jane Smith	Unshipped	\$18.98	Merchant	1	No	Aug 13, 2018 7:17:44 PM	Aug 17, 2018	Status updated to Unshipped	<a href="#">View Amazon Order Details</a>
<input type="checkbox"/>	111-1071022-7108204	Go Cloud	000000001	Jane Smith	Unshipped	\$18.98	Merchant	1	No	Aug 13, 2018 7:17:44 PM	Aug 17, 2018	Status updated to Unshipped	<a href="#">View Amazon Order Details</a>
<input type="checkbox"/>	111-1071022-7108214	Go Cloud		Sandra Day	Pending	\$72.00	Merchant	1	Yes	Aug 13, 2018 7:17:44 PM	Aug 17, 2018	Inventory reserved	<a href="#">View Amazon Order Details</a>
<input type="checkbox"/>	111-1071022-7108216	Go Cloud		Andy Knott	Pending	\$72.00	Merchant	1	No	Aug 13, 2018 7:17:44 PM	Aug 17, 2018		<a href="#">View Amazon Order Details</a>

### Order Management

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

## Default Columns

COLUMN	DESCRIPTION
Amazon Order Number	The order number generated by your Amazon Central Seller account and imported into Magento.
Amazon Store Name	The name of the Amazon store in which the order was placed. Click the store name to view the store's <b>dashboard</b> .
Magento Order Number	The corresponding order number created by Magento when the order information is received from your Amazon Seller Central account (if set to create a corresponding order in your <b>order settings</b> ). Tap the number to view and manage the order similar to <b>Processing a Magento Order</b> .
Buyer Name	The name of the person who placed the order as received from Amazon Seller Central.
Status	The status of the order. Options: <ul style="list-style-type: none"><li>• Pending</li><li>• Unshipped</li><li>• Shipped</li><li>• Canceled</li><li>• Completed</li><li>• Partially Shipped</li></ul>
Total	The total dollar value of the order as received from Amazon Seller Central.
<b>Fulfillment Channel</b>	Identifies the party responsible for sorting, packing, and shipping of an order. Options: <ul style="list-style-type: none"><li>• Merchant</li><li>• Amazon</li></ul>
Items Unshipped	The number of items in the order that have not yet been shipped.
Reserved	Based on your <b>order settings</b> , if "Pending Orders" status is set to reserve quantity in your stock, then this will display "Yes" or "No" accordingly. If set to "Yes:" <ul style="list-style-type: none"><li>• When the order is processed by Amazon Seller Central and the corresponding Magento order is created, the reserve quantity</li></ul>

## Default Columns (cont.)

COLUMN	DESCRIPTION
	<p>is removed from available stock.</p> <ul style="list-style-type: none"><li>• If an order is canceled, the reserve quantity is added back to available stock.</li></ul>
Purchase Date	The date of the purchase as received from Amazon Seller Central.
Latest Ship Date	The latest date that Amazon Seller Central expects you to ship the order so that it arrives on time. This is very important for maintaining your Amazon Seller Central business score.
Last Action	<p>A custom message from Amazon Seller Central to Amazon Sales Channel that explains the action was last taken for the order. This allows the merchant to have a single location in Amazon Sales Channel to view the status of Amazon Seller Central orders.</p> <p>The last action text may let the store owner know that an Amazon Seller Central order has been canceled, that the Amazon Seller Central has successfully invoiced the order payment, that the system attempted to create a new Magento order but was unable to, or that a corresponding Magento order was successfully created.</p>
Action	<p><a href="#">View Amazon Order Details</a></p> <p>The order amount, customer email, customer name, and Magento order number (if set to create a corresponding order) populate when the order is added to the Orders tab.</p>

## Optional Columns

COLUMN	DESCRIPTION
Order Id	This is the identifier assigned by Magento for the Amazon order when the order was received from Amazon and created in the Amazon Sales Channel.
Merchant Id	This is the number assigned by Magento to the Amazon store you created and integrated with an Amazon Seller Central account.
Is Prime	Identifies the order as using the Amazon Prime shipping option. Options: Yes/No.
Purchase Order Number	
Is Replacement	
Items Shipped	Identifies the number of items in the order in Shipped status.



## Order Settings

Your order settings are configured first during **onboarding**, but can be modified at any time. You can access your order settings for an Active or Inactive store in the **store's dashboard**. In the **I Want To...** section, tap **Order Settings**. The Order Settings screen displays.

Order Settings define how Amazon orders are imported into and processed in Magento.

Beginning when you integrate Amazon Sales Channel with your Amazon Seller Central account during onboarding, Amazon orders import and create new orders in Amazon Sales Channel. Amazon orders are imported and create new orders when the Amazon sets the order status to "Unshipped." Orders that existed in Amazon in any status other than "Unshipped" prior to your store's integration will not import.

When an order is created on Amazon, it is not immediately imported into Amazon Sales Channel. Amazon assigns a "Pending" status to newly created orders. Once Amazon verifies the order and payment method, Amazon changes the order's status to "Unshipped." This status change triggers Amazon Sales Channel to import the order and create a corresponding order. Amazon Sales Channel creates a matching order that corresponds to the Amazon order. Orders created in Amazon Sales Channel display and can be managed in the **Orders** tab in Amazon Sales Channel Home.

### To configure Order Settings:

1. Tap **Order Settings** in the onboarding progress bar.
2. For **Import Amazon Orders** (required), choose an option in the drop-down:
  - **Disabled:** Select this option if you do not want to create corresponding orders in Magento when new orders are received from Amazon. When this option is selected, all other fields on this screen are disabled.
  - **Enabled:** Select this option if you want to create corresponding Magento orders when new orders are received from Amazon. Magento orders are created based on Amazon status and stock levels.

"Enabled" must be selected to manage Amazon orders in Amazon Sales Channel. When "Disabled" is selected, your Amazon orders will display in the Orders tab but will not have a corresponding Magento order number and cannot be managed in Amazon Sales Channel. Information for these orders is for review only. You must manage these orders in your Amazon Seller Central account.

3. For **Import Amazon Orders Into Magento Store** (required), select which Magento Store the Amazon orders will be associated with when they are created in the Magento Order grid. The list of options in this drop-down is dependent on the Magento stores you have set up in your configuration. See [Stores](#).
4. For **Customer Creation**, select an option in the drop-down. Options:
  - **No Customer Creation (guest)**: Select this option if you do not want to create a customer account in Magento using the imported customer data from the Amazon order. When selected, this option tells Magento to process an imported Amazon order the same way it processes a guest checkout in Magento.
  - **Build New Customer Account**: Select this option if you want to create a New Customer Account in Magento using the customer data imported with the Amazon order. Selecting this option builds your customer database from your Amazon orders.
5. For **Order Number Source**, select an option in the drop-down. Options:
  - **Build Using Magento Order Number**: Select this option if you want to create a unique Magento order number for the corresponding Amazon order using the Magento incrementally-assigned order ID.
  - **Build Using Amazon Order Number**: Select this option if you want to create the Magento order number using the corresponding Amazon-assigned order number.

Once an order is imported, the Amazon Order Number and the Magento Order Number display in the [Orders tab](#).

6. For **Pending Orders** (required), select an option in the drop-down. Options:
  - **Do Not Reserve Quantity**: Select this option when you do not want your Magento stock quantity affected by your Amazon orders. Select this option if you use Amazon for your fulfillment process (FBA). When this option is selected and you receive an Amazon order, the quantity ordered will not affect your Magento stock quantity.
  - **Reserve Quantity**: Select this option when you want the order quantity in the Amazon order to be "reserved" in your Magento stock quantity. When this option is selected and you receive an Amazon order, the quantity ordered will "reserve" in your Magento stock quantity to prevent your Magento stock from "over selling."

Remember, Amazon orders do not import into and create new orders in Magento until Amazon verifies the order and payment method changes the order status to "Unshipped."

7. For **Order Status** (required), select an option from the drop-down. Options:

- **Default Order Status:** Select this option when you want newly created orders imported from Amazon to be assigned your defined default order status for new orders. The default status for new orders (unless you have created a custom order status for new orders) is "Pending." See [Processing Orders](#).
- **Custom Order Status:** Select this option when you want newly created orders imported from Amazon to be assigned a status other than the default. When this option is selected, the Processing Order Status field enables for you to select the status you want to use for newly created orders imported from Amazon.
- **Processing Order Status:** Select an option in the drop-down. The options that display in this field are based on the default status options in Magento. See [Order Status](#). You can also create a custom order status to display here for selection. To create a custom order status, see [Custom Order Status](#).

*Order Settings*

## Field Descriptions

FIELD	DESCRIPTION
Import Amazon Orders	Options: <ul style="list-style-type: none"> <li>• <b>Disabled:</b> Select this option if you do not want to create corresponding orders in Magento when new orders are received from Amazon. When this option is selected, all other fields on this screen are disabled.</li> <li>• <b>Enabled:</b> Select this option if you want to create corresponding Magento orders when new orders are received from Amazon. Magento orders are created based on Amazon status and stock levels.</li> </ul>

## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<p>"Enabled" must be selected to manage Amazon orders in Amazon Sales Channel. When "Disabled" is selected, your Amazon orders will display in the Orders tab but will not have a corresponding Magento order number and cannot be managed in Amazon Sales Channel. Information for these orders is for review only. You must manage these orders in your Amazon Seller Central account.</p>
Import Amazon Orders Into Magento Store	Select which Magento Store the Amazon orders will be associated with when they are created in the Magento Order grid. The list of options in this drop-down is dependent on the Magento stores you have set up in your configuration. See <a href="#">Stores</a> .
Customer Creation	Options: <ul style="list-style-type: none"><li>• <b>No Customer Creation (guest):</b> Select this option if you do not want to create a customer account in Magento using the imported customer data from the Amazon order. When selected, this option tells Amazon Sales Channel to process an imported Amazon order the same way it processes a guest checkout in Magento.</li><li>• <b>Build New Customer Account:</b> Select this option if you want to create a New Customer Account in your Magento customer database using the customer data imported with the Amazon order. Selecting this option builds your customer database from your Amazon orders.</li></ul>
Order Number Source	Options: <ul style="list-style-type: none"><li>• <b>Build Using Magento Order Number:</b> Select this option if you want to create a unique Amazon Sales Channel order number for the corresponding Amazon order using the Magento incrementally-assigned order ID.</li><li>• <b>Build Using Amazon Order Number:</b> Select this option if you want to create the Magento order number using the corresponding Amazon-assigned order number.</li></ul>
Pending Orders	Options: <ul style="list-style-type: none"><li>• <b>Do Not Reserve Quantity:</b> Select this option when you do not want your Magento stock quantity affected by your Amazon</li></ul>



## Field Descriptions (cont.)

FIELD	DESCRIPTION
	<p>orders. Selected this option if you use Amazon for your fulfillment process (FBA). When this option is selected and you receive an Amazon order, the quantity ordered will not affect your Magento stock quantity.</p> <ul style="list-style-type: none"><li>• <b>Reserve Quantity:</b> Select this option when you want the order quantity in the Amazon order to be "reserved" in your Magento stock quantity. When this option is selected and you receive an Amazon order, the quantity ordered will "reserve" in your Magento stock quantity to prevent your Magento stock from "over selling." The reserved quantity will not be available for purchase through your Magento storefront.</li></ul>
Order Status	<p>Options:</p> <ul style="list-style-type: none"><li>• <b>Default Order Status:</b> Select this option when you want newly created orders imported from Amazon to be assigned your defined default order status for new orders. The default status for new orders (unless you have created a custom order status for new orders) is "Pending." See <a href="#">Processing Orders</a>.</li><li>• <b>Custom Order Status:</b> Select this option when you want newly created orders imported from Amazon to be assigned a status other than the default. When this option is selected, the Processing Order Status field enables for you to select the status you want to use for newly created orders imported from Amazon.</li></ul>
Processing Order Status	<p>Enables when Order Status is set to "Custom Order Status." Select an option in the drop-down. The options that display in this field are based on the default status options in Magento. See <a href="#">Order Status</a>. You can also create a custom order status to display here for selection. To create a custom order status, see <a href="#">Custom Order Status</a>.</p>

## Magento Order Creation

Magento orders are created for Amazon orders based on the following status and inventory conditions.

## Order Creation without Multi Source Inventory (MSI)

FULFILLMENT CHANNEL	MAGENTO INVENTORY STATUS	AMAZON ORDER STATUS	CREATE MAGENTO ORDER?	RESERVE INVENTORY Y = YES	RESERVE INVENTORY Y = NO
FBA	In-stock/Out-of-stock/Do Not Manage	Pending	No	Inventory not reserved	Inventory not reserved
FBA	In-stock/Out-of-stock/Do Not Manage	PendingAvailability	No	Inventory not reserved	Inventory not reserved
FBA	In-stock/Out-of-stock/Do Not Manage	Canceled	No	Inventory not reserved	Inventory not reserved
FBA	In-stock/Out-of-stock/Do Not Manage	Error	No	Inventory not reserved	Inventory not reserved
FBA	In-stock/Out-of-stock/Do Not Manage	Unshipped	No	Inventory not reserved	Inventory not reserved
FBA	In-stock/Out-of-stock/Do Not Manage	PartiallyShipped	No	Inventory not reserved	Inventory not reserved
FBA	In-stock/Out-of-stock/Do Not Manage	Shipped	Yes	Inventory not reserved	Inventory not reserved
FBM	In-stock/Out-of-stock/Do Not Manage	Pending	No	Inventory reserved	Inventory not reserved
FBM	In-stock/Out-of-stock/Do Not Manage	PendingAvailability	No	Inventory not reserved	Inventory not reserved
FBM	In-stock/Out-of-stock/Do Not Manage	Canceled	No	Inventory not reserved	Inventory not reserved
FBM	In-stock/Out-of-stock/Do Not Manage	Error	No	Inventory not reserved	Inventory not reserved

### Order Creation without Multi Source Inventory (MSI) (cont.)

FULLFILLMENT CHANNEL	MAGENTO INVENTORY STATUS	AMAZON ORDER STATUS	CREATE MAGENTO ORDER?	RESERVE INVENTORY Y = YES	RESERVE INVENTORY Y = NO
FBM	In-stock/Out-of-stock/Do Not Manage	Unshipped	Yes	Inventory reserved	Inventory not reserved
FBM	In-stock/Out-of-stock/Do Not Manage	PartiallyShipped	Yes	Inventory reserved	Inventory not reserved
FBM	In-stock/Out-of-stock/Do Not Manage	Shipped	Yes	Inventory reserved	Inventory not reserved

### Order Creation with Multi Source Inventory (MSI)

FULLFILLMENT CHANNEL	MAGENTO INVENTORY STATUS	AMAZON ORDER STATUS	CREATE MAGENTO ORDER?	INVENTORY RESERVED?
FBA	In-stock/Out-of-stock/Do Not Manage	Pending	No	No
FBA	In-stock/Out-of-stock/Do Not Manage	PendingAvailability	No	No
FBA	In-stock/Out-of-stock/Do Not Manage	Canceled	No	No
FBA	In-stock/Out-of-stock/Do Not Manage	Error	No	No
FBA	In-stock/Out-of-stock/Do Not Manage	Unshipped	No	No

## Order Creation with Multi Source Inventory (MSI) (cont.)

FULLFILLMENT CHANNEL	MAGENTO INVENTORY STATUS	AMAZON ORDER STATUS	CREATE MAGENTO ORDER?	INVENTORY RESERVED?
FBA	In-stock/Out-of-stock/Do Not Manage	PartiallyShipped	No	No
FBA	In-stock/Do Not Manage	Shipped	Yes	No
FBA	Out-of-stock	Shipped	No	No
FBM	In-stock/Out-of-stock/Do Not Manage	Pending	No	No
FBM	In-stock/Out-of-stock/Do Not Manage	PendingAvailability	No	No
FBM	In-stock/Out-of-stock/Do Not Manage	Canceled	No	No
FBM	In-stock/Out-of-stock/Do Not Manage	Error	No	No
FBM	In-stock/Do Not Manage	Unshipped	Yes	Yes
FBM	Out-of-stock	Unshipped	No	No
FBM	In-stock/Do Not Manage	PartiallyShipped	Yes	Yes
FBM	Out-of-stock	PartiallyShipped	No	No
FBM	In-stock/Do Not Manage	Shipped	Yes	Yes
FBM	Out-of-stock	Shipped	No	No

If an Amazon order is imported in a "Partially Shipped" or "Shipped" status, the inventory reservation that is created will be for all items in the order. Amazon Sales Channel does not compensate for items that have been previously shipped. This behavior is the same in both non-MSI and MSI integrations.

If an order is Fulfilled by Amazon (FBA) but an item is in "out of stock" status, Amazon Sales Channel is unable to create a Magento order. This is a limitation of MSI integrations.

## Amazon Order Details

When viewing the details of an Amazon order:

- The Order and Shipping Details tab displays additional detailed order information.
- The Order Items tab displays all items associated with the selected Amazon order.
- The Tracking tab displays tracking information associated with the selected Amazon order.

If an order is in "Unshipped" status, the **Cancel Order** option will display in the header bar.

### To cancel and order in "Unshipped" status:

1. View the order on the Orders tab in Amazon Sales Channel Home.
2. Tap **View Amazon Order Details** in the Action column.
3. Tap **Cancel Order** in the header bar. If the order is not in "Unshipped" status, "Cancel Order" will not display.
4. For **Reason For Cancellation**, select an option.
5. Tap **Cancel Order** in the header bar. The order is canceled, and the Status column for the order on the Order tab is updated to "Canceled."

## Order and Shipping Details tab

Amazon Order Details

← Back Cancel Order

Order and Shipping Details Order Items Tracking

View User Guide

Displays important order details associated with the selected Amazon order.

Order Number: 111-1071022-7108202  
 Status: Unshipped  
 Buyer Email: test@test.com  
 Buyer Name: Jane Smith  
 Currency: USD  
 Order Total: 18.98  
 Inventory Reserved: No  
 Is Premium: No  
 Is Prime: No  
 Last Action: Status updated to Unshipped  
 Purchase Date: 08/14/2018 02:17:44  
 Latest Ship Date: 08/18/2018 06:59:59

Shipping Service: Standard  
 Shipping Service Level: Standard  
 Shipped By Amazon: No  
 Is Business: No  
 Items Shipped: 0  
 Items Unshipped: 1  
 Fulfillment Channel: MFN  
 Shipping Address: Jane Smith  
 11501 Domain Dr #150  
 Austin, TX 78758  
 US  
 111-1111-1111

*Order and Shipping Details*

## Order Items tab

Amazon Order Details

← Back Cancel Order

Order and Shipping Details Order Items Tracking

View User Guide

Displays all items associated with the selected Amazon order.

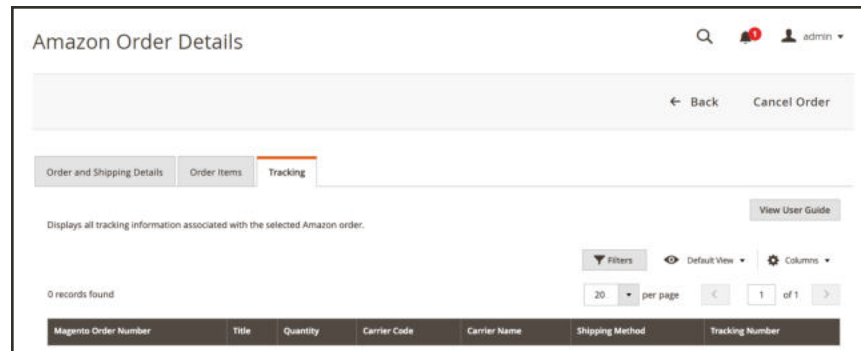
Filters Default View Columns

1 records found 20 per page 1 of 1

Magento Order Number	Qty Ordered	Title	ASIN	Amazon Seller SKU	Condition	Row Price	Row Tax	Shipping Price
	1	Paper Mate InJoy Gel Pens, Fine Point, Assorted Colors, 8 Count	B019QB0GBU	1968614QJ5	New	\$15.00	\$1.00	\$1.00

*Order Item Details*

## Tracking tab



*Tracking Details*

### To cancel an unshipped order:

1. On the Amazon Sales Channel Home > Orders screen, locate the order you want to cancel in the list.
2. Verify the order's Status as Unshipped. Then tap **View Amazon Order Details** in the Action column.
3. On the Amazon Order Details screen, tap **Cancel Order**.

You will be prompted to enter a reason for the cancellation, and then confirm. The cancellation notification will be sent to your Amazon Seller Central account, and the customer associated with the order will be properly notified. The status of the corresponding Magento order will change to Complete.

Orders can only be canceled if they are in an Unshipped status. If the order is pending or partially shipped (unshipped), the order can only be canceled through your Amazon Seller Central account.

## Common Order Processing Tasks

Amazon Sales Channel can manage your Amazon orders, including emailing the buyer, fulfilling the order (shipping), issuing credits/refunds, adding comments, and more. To manage your Amazon orders, your **order settings** must be set to create corresponding Magento orders when Amazon orders are received. Amazon order information displays on the Orders tab in Amazon Sales Channel Home.

When corresponding Magento orders are created for Amazon orders, the assigned number displays in the Magento Order Number column. Tapping the order number opens the order in the Magento **order processing** screen in a new tab. You can process the order as you do your other Magento orders.

When processing an Amazon order, Amazon Sales Channel updates and syncs the order information with your Amazon Seller Central account. Your cron settings determine how often order information is synced between Amazon and Amazon Sales Channel.



Common Magento [order processing](#) tasks include:

- [Issuing a credit/refund](#)
- [Fulfilling/shipping an order](#)
- [Create an invoice](#)
- [Cancel an order](#)

If an order is in "Unshipped" status, you can cancel an Amazon order on the [Amazon Order Details](#) screen. If an order has been shipped, it cannot be canceled.

See [Magento Order Management](#).

# Amazon Fulfillment Workflows<sup>E</sup>

## Example: Fulfilled by Merchant

1

**A merchant-fulfilled order is placed on Amazon.** Amazon assigns a status of "Pending" until the customer's credit card information is verified. Orders in "Pending" status automatically import into Amazon Sales Channel but do not display on the **Orders** tab.

2

**The order is verified by Amazon.** When verified, Amazon changes the status to "Unshipped." With this status change, the order is updated in Amazon Sales Channel and displayed in the **Order** tab.

3

**The order details are updated.** Amazon Sales Channel updates the order details with the price, customer email, and customer name. During this update, the Amazon order will create the corresponding Magento order in the Magento order management screen. The Magento order number will display with the order information on the **Orders** tab.

4

**A new customer account is created.** If configured in your **order settings** and the customer does not exist in your Magento database, a new customer is created in your Magento database using the corresponding customer information from the Amazon order. If you selected "No Customer Creation (guest)" in your **order settings**, the order will follow the Magento guest process and not create a new customer in your database. At this point, if your Magento system is integrated with an ERP/OMS/WMS, the order will be picked up per the integration of a new order being placed and created inside Magento.

5

**The order is shipped.** From the Magento order processing screen, you will **ship** the order and add a tracking number. Once all items are marked in a "Shipped" status

- The status of the Magento order will change to "Complete."
- The status of the Amazon Sales Channel order will change to "Shipped."
- The tracking number will be synced to Amazon, and the status of the order in Amazon will change to "Shipped."
- Shipping notifications will be sent to the customer via Amazon, not from Magento (per Amazon's policies).

## Example: Fulfilled by Amazon (FBA)

1

**An Amazon-fulfilled order is placed on Amazon.**

2

**The order is imported.** The order is not imported into Amazon Sales Channel until the order is assigned the "Shipped" status by Amazon. Since Amazon has the inventory for this product, this prevents interference with your warehouse/inventory management.

3

**The order details are updated.** If configured in your [order settings](#), the Amazon order will create the corresponding Magento order and be created as an order with a status of "Complete."

## Logs and Store Reports

Amazon Sales Channel includes some valuable log and reporting features. These features allow you to view the changes that have occurred in Amazon Sales Channel that are affecting your Amazon listings and orders. This is a very important feature to make sure the desired changes are being made and to understand various listing statuses.

No actions are available for the logs or reports, as they are review-only features.

The following logs apply to Amazon Sales Channel and are not store specific. These logs can be accessed on [Amazon Sales Channel Home](#).

- The [Listing Changes Log](#) displays the changes that have occurred in your Amazon Seller Account as a reflection of your Amazon Sales Channel settings.
- The [Communication Errors Log](#) displays any reported communication errors with Amazon.

The following reports are store-specific and can be accessed when viewing each store's [dashboard](#).

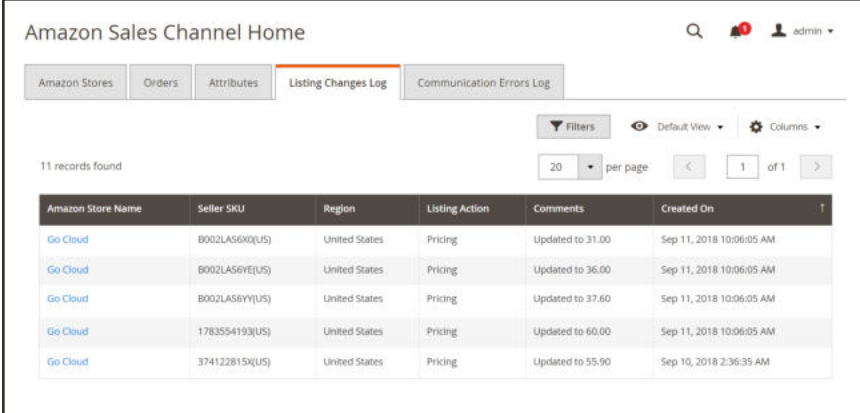
- The [Competitive Price Analysis](#) report displays your Amazon landed price (listing price plus shipping price) in relation to the Buy Box price and lowest competitor price.
- The [Listing Improvements](#) report displays all suggested listing improvements provided by Amazon for the selected store.

## Listing Changes Log

The Listing Changes Log displays the changes that have occurred in your Amazon Seller Account as a reflection of your Amazon Sales Channel settings. This log indicates the global changes that have been synced between Amazon and Amazon Sales Channel. This log includes listing changes for a product SKU such as the type of action (change), brief description of the change, and the date of the change.

No actions are available for the log. It is a review-only feature.

Amazon Sales Channel Home tabs share some common [workspace controls](#) that allow you to customize the data that is displayed.



Amazon Store Name	Seller SKU	Region	Listing Action	Comments	Created On
Go Cloud	B002LAS6X0(U.S)	United States	Pricing	Updated to 31.00	Sep 11, 2018 10:06:05 AM
Go Cloud	B002LAS6YE(U.S)	United States	Pricing	Updated to 36.00	Sep 11, 2018 10:06:05 AM
Go Cloud	B002LAS6YI(U.S)	United States	Pricing	Updated to 37.60	Sep 11, 2018 10:06:05 AM
Go Cloud	1783554193(U.S)	United States	Pricing	Updated to 60.00	Sep 11, 2018 10:06:05 AM
Go Cloud	374122815X(U.S)	United States	Pricing	Updated to 55.90	Sep 10, 2018 2:36:35 AM

*Listing Changes Log*

### Default Columns

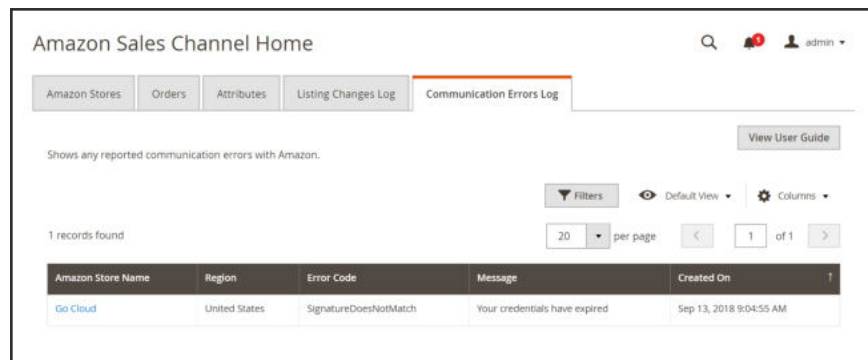
COLUMN	DESCRIPTION
Amazon Store Name	The name of the store defined when the Amazon store was set up. Refer to <a href="#">Store Integration</a> .
Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
Listing Action	The type of change that was made to the listing.
Comments	Additional information about the listing change.
Created On	The date and time the change was made.

## Communication Errors Log

The Communication Errors Log displays any reported communication errors with Amazon. Information includes the affected Amazon Sales Channel store, error code and brief description, and the date and time of the error.

No actions are available for the log. It is a review-only feature.

Amazon Sales Channel Home tabs share some common [workspace controls](#) that allow you to customize the data that is displayed.



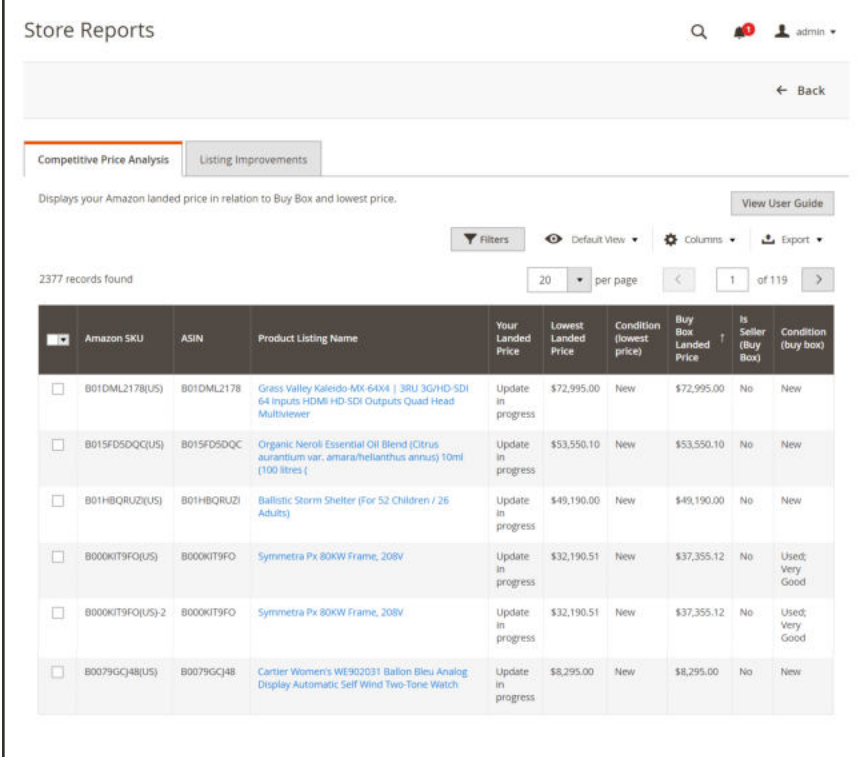
*Communication Errors Log*

### Default Columns

COLUMN	DESCRIPTION
Amazon Store Name	The name of the store defined when the Amazon store was set up. Refer to <a href="#">Store Integration</a> .
Error Code	The code received from Amazon to identify the error type.
Message	The message that describes the error associated to the error code.
Created On	The date and time the error occurred.

## Competitive Price Analysis

The Competitive Price Analysis report displays your Amazon listings per marketplace with the respective **Buy Box** price and lowest competitor price values. No actions are available for the log. It is a review-only feature.



Store Reports

← Back

Competitive Price Analysis | Listing Improvements

Displays your Amazon landed price in relation to Buy Box and lowest price. [View User Guide](#)

Filters | Default View | Columns | Export

2377 records found | 20 per page | 1 of 119

	Amazon SKU	ASIN	Product Listing Name	Your Landed Price	Lowest Landed Price	Condition (lowest price)	Buy Box Landed Price	Is Seller (Buy Box)	Condition (buy box)
<input type="checkbox"/>	B01DML2178(US)	B01DML2178	Grass Valley Kaleido-MX 6-6X4   3RU 3G/H/D-SDI 64 Inputs HDMI HD-SDI Outputs Quad Head Multiviewer	Update in progress	\$72,995.00	New	\$72,995.00	No	New
<input type="checkbox"/>	B015FD5DQC(US)	B015FD5DQC	Organic Neroli Essential Oil Blend (Citrus aurantium var. amara/helianthus annuus) 10ml (100 litres l	Update in progress	\$53,550.10	New	\$53,550.10	No	New
<input type="checkbox"/>	B01HBQRUZ(US)	B01HBQRUZ	Ballistic Storm Shelter (For 52 Children / 26 Adults)	Update in progress	\$49,190.00	New	\$49,190.00	No	New
<input type="checkbox"/>	B000KIT9FO(US)	B000KIT9FO	Symmetra Px 80KW Frame, 208V	Update in progress	\$32,190.51	New	\$37,355.12	No	Used; Very Good
<input type="checkbox"/>	B000KIT9FO(US)-2	B000KIT9FO	Symmetra Px 80KW Frame, 208V	Update in progress	\$32,190.51	New	\$37,355.12	No	Used; Very Good
<input type="checkbox"/>	B0079GQJ48(US)	B0079GQJ48	Cartier Women's WE902031 Ballon Bleu Analog Display Automatic Self Wind Two-Tone Watch	Update in progress	\$8,295.00	New	\$8,295.00	No	New

*Competitive Price Analysis*

### Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items.

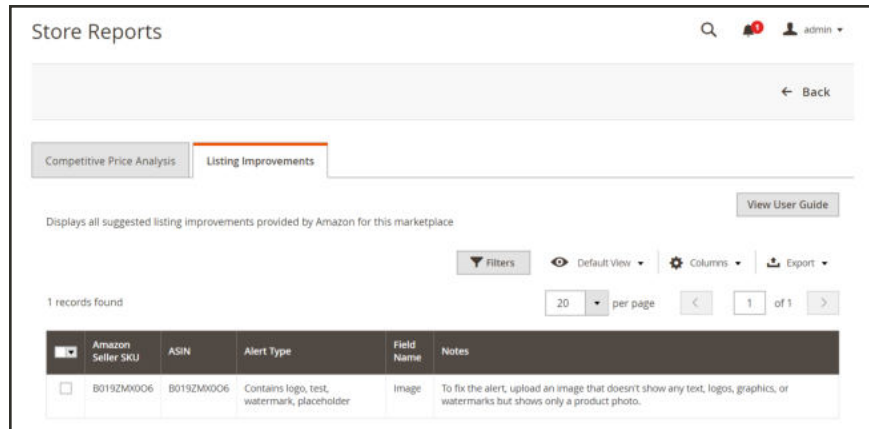
## Default Columns (cont.)

COLUMN	DESCRIPTION
	ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Product Listing Name	The name of the product.
Your Landed Price	Your listing price for the product plus its shipping price.
Lowest Landed Price	The lowest landed price (listing price plus its shipping price) from your Amazon competitors.
Condition (lowest price)	The condition of the product listed at the lowest price.
Buy Box Landed Price	The landed price (listing price plus its shipping price) of the <b>Buy Box</b> position listing.
Is Seller (Buy Box)	Whether or not you have won the Buy Box position for the listing (NA indicates there is no Buy Box price for the listing).
Condition (Buy Box)	The condition of the Buy Box position listing.

## Listing Improvements

The Listing Improvements report displays products with suggestions from Amazon to improve the listing quality. You can review these suggestions, which could help the performance of products within the Amazon listing. No actions are available for the log. It is a review-only feature.

A listing improvement received from Amazon does not prevent your product from being listed with Amazon.



### *Listing Improvements*

## Default Columns

COLUMN	DESCRIPTION
Amazon Seller SKU	The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.
ASIN	A unique block of 10 letters and/or numbers that identify items.  ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.
Alert Type	Describes the type of issue with the listing. For example, "Missing" indicates that there is a missing required attribute.
Field Name	The field name in the Amazon seller listing details for which the improvement is being recommended.
Notes	A description of the suggested improvement received from Amazon.



# CONTENT

## Contents

In this section of the guide, you'll learn how to create content and manage the presentation of your store.

[Content Elements](#)

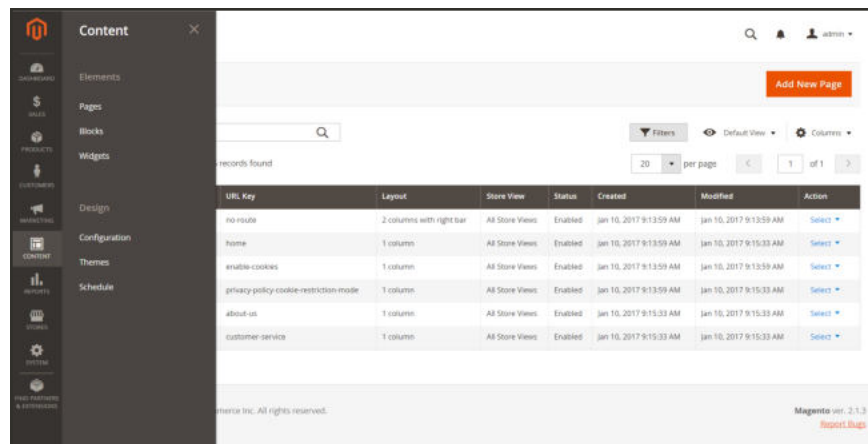
[Design & Theme](#)

## CHAPTER 40:

# Content Menu

The term **content marketing**<sup>1</sup> refers to the art of promoting your products or services by providing valuable information to your customers at no charge. The quality of your content helps distinguish your store from others, increases your visibility to search engines, and provides support to your customers. This soft-sell approach is often more effective than advertising, builds credibility and trust, and can turn your store into a destination. Content is still king.

Your content should reflect the branding of your store, and be delivered with your distinctive visual presentation and voice to convey your message. Use pictures to tell a story. Educate, inspire, and entertain. Keep in mind that with quality content, sometimes less is more.



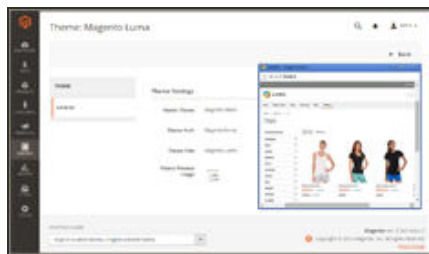
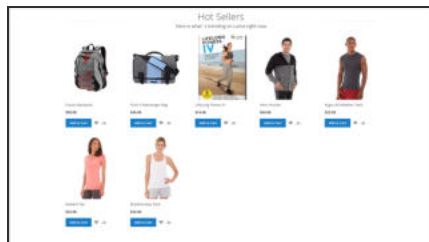
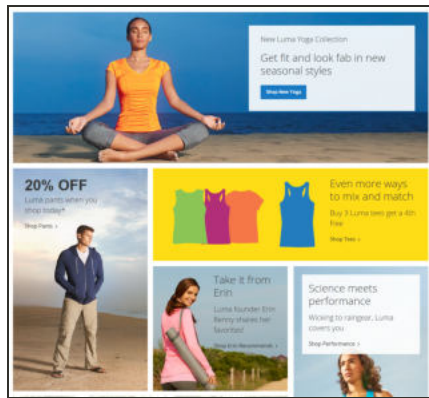
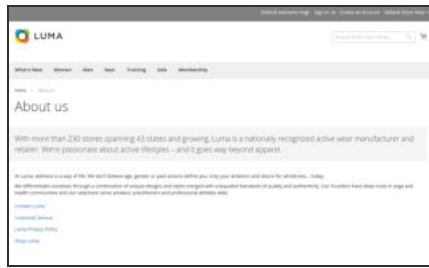
*Content Menu*

### To display the Content menu:

On the Admin sidebar, tap **Content**.

<sup>1</sup>The art of promoting products or services by providing valuable information at no charge.

# Menu Options



## Pages

Create pages with text, images, blocks, variables, and widgets, that can be incorporated into the navigation of your store, and linked to other pages.

## Blocks

Create blocks of content without writing any code. Blocks can contain text, images, and even video, and can be assigned to any part of the page layout.

## Widgets

Display dynamic data and add blocks, links, and interactive elements most anywhere in your store.

## Design

Learn to manage the visual presentation of your store, apply themes, and schedule design changes.

# Content Elements

## Content Elements

In this section of the guide, you'll learn how to create and manage content pages and blocks, and use variables and widgets to add dynamic content.

### Content Menu

#### Pages

- Core Content Pages
- Workspace Controls
- Adding a New Page
- Using the Editor
  - Inserting a Link
  - Inserting an Image
  - Inserting a Widget
  - Inserting a Variable
  - Configuring the Editor
- Adding a Lightbox or Slider
- Using Media Storage

#### Blocks

- Adding a New Block
- Adding Social Plugins
- Positioning Blocks on a Page

#### Widgets

- Widget Types
- Creating a Widget
  - New Products List

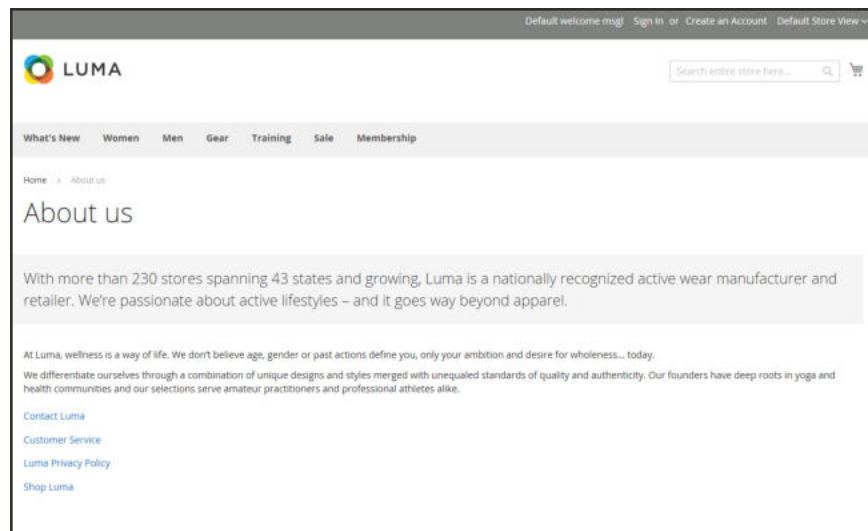
#### Design & Theme

## CHAPTER 41:

# Pages

All content can be viewed in terms of its shelf life, just as any product in a store. Did you know that the shelf life of social media content is less than twenty-four hours? The potential shelf life of the content you create can help you decide where to invest your resources.

Content with a long shelf life is sometimes referred to as **evergreen content**<sup>1</sup>. Examples of evergreen content include customer success stories, "how to" instructions, and Frequently Asked Questions (FAQ.) In contrast, content is perishable by nature includes events, industry news, and press releases.



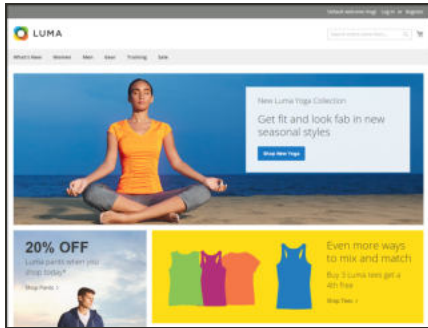
*About Us*

---

<sup>1</sup>Content that has a long shelf life.

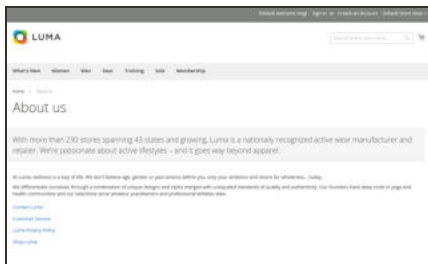
# Core Content

The Magento demo store has examples of core content pages to help you get started. All of the pages can be modified to meet your needs. Take a look at the following pages in your store, to make sure that the content conveys your message, voice, and brand.



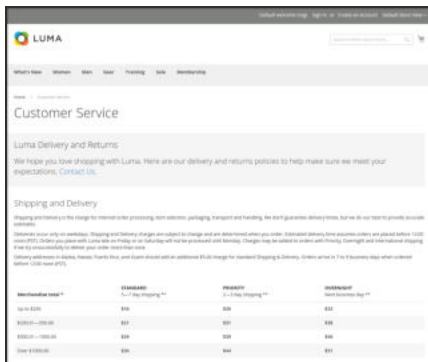
## Home

The demo “Home” page includes a banner, an image carousel, several static blocks with links, and a list of new products.



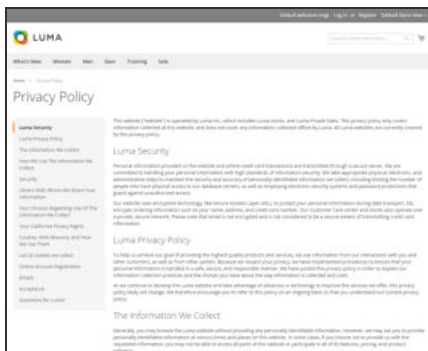
## About Us

The “About Us” page is linked from the footer of your store. You can include images, video, links to press releases and announcements. The sample page has an image on the right, and one of a decorative sort to indicate the end of the page.



## Customer Service

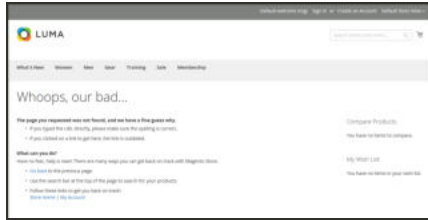
The “Customer Service” page is another node in the page hierarchy. The two headers on the page have content that only becomes visible when the header is clicked.



## Privacy Policy

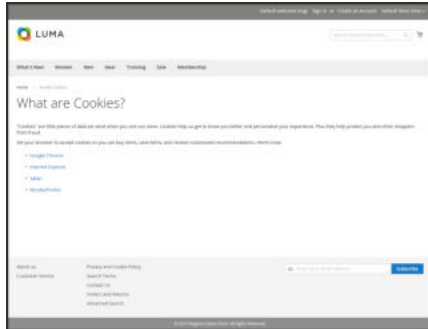
Your store’s “Privacy Policy” page should be updated with your own information. As a best practice, your privacy policy should explain to your customers the type of information that your company collects and how it is used.





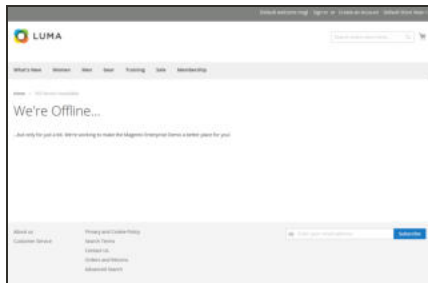
## 404 Not Found

The “404 Page Not Found” page is named for the response code that is returned when a page cannot be found. URL redirects reduce the number of times that this page appears. However, for those times when it is necessary, you might as well take advantage of the opportunity to offer some links to products that the customer might find interesting.



## Enable Cookies

The “Enable Cookies” page appears when visitors to your site do not have cookies enabled in their browsers. The page provides step-by-step, illustrated instructions to enable cookies for the most popular browsers.




## Service Unavailable

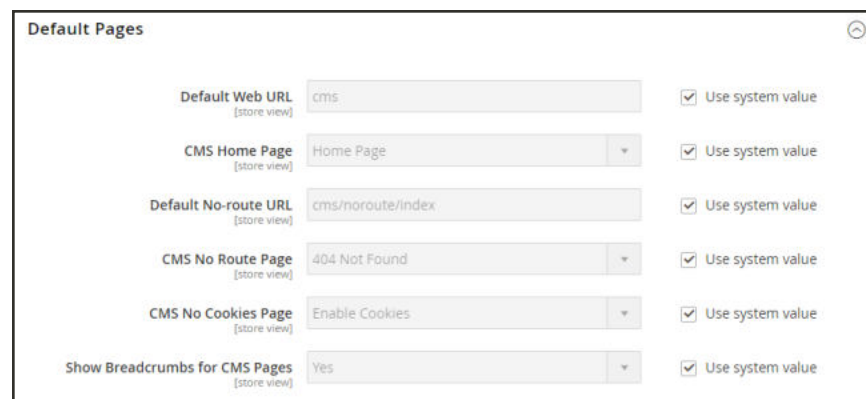
The “503 Service Unavailable” page is named for the response code that is returned when the server is unavailable.

## Default Pages

The Default Pages configuration determines the landing page that is associated with the **base URL**, and the corresponding home page. It also determines which page appears when a “Page Not Found” error occurs, and if a **breadcrumb trail** appears at the top of each page.

### To configure the default pages:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand  the **Default Pages** section. Then, do the following:



Default Pages		
Default Web URL <small>[store view]</small>	cms	<input checked="" type="checkbox"/> Use system value
CMS Home Page <small>[store view]</small>	Home Page	<input checked="" type="checkbox"/> Use system value
Default No-route URL <small>[store view]</small>	cms/noroute/index	<input checked="" type="checkbox"/> Use system value
CMS No Route Page <small>[store view]</small>	404 Not Found	<input checked="" type="checkbox"/> Use system value
CMS No Cookies Page <small>[store view]</small>	Enable Cookies	<input checked="" type="checkbox"/> Use system value
Show Breadcrumbs for CMS Pages <small>[store view]</small>	Yes	<input checked="" type="checkbox"/> Use system value

### *Default Pages*

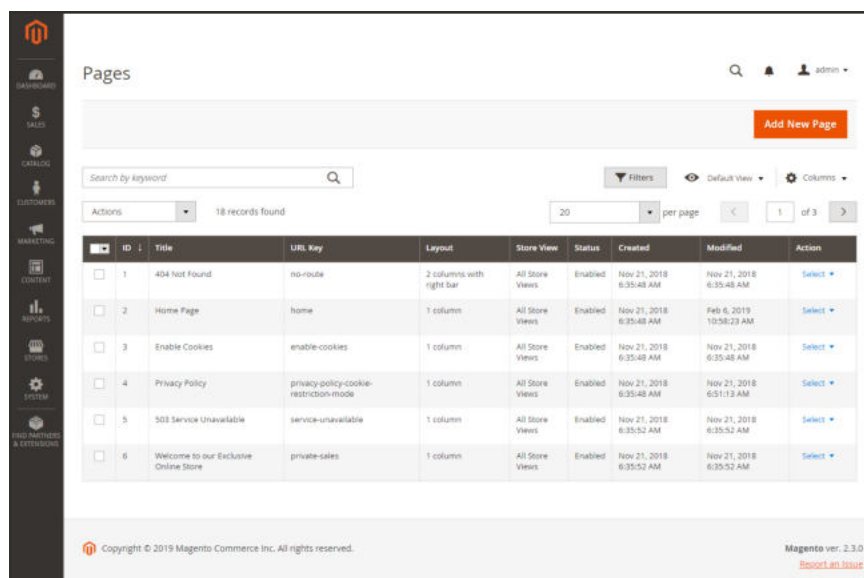
- a. In the **Default Web URL** field, enter the relative path to the folder in the Magento installation that contains the landing page. The default value is “cms.”

For a specific store view, clear the **Use Default** checkbox next to the Default Web URL field, and any other default fields to be changed.

- b. Set **CMS Home Page** to the CMS page to be used as the home page.
  - c. In the **Default No-route URL** field, enter the relative path to the folder in the Magento installation where the page is redirected when a “404 Page Not Found” error occurs. The default value is “cms/index/noRoute.”
  - d. Set **CMS No Route Page** to the CMS page that appears when a “404 Page Not Found” error occurs.
  - e. Set **CMS No Cookies Page** to the CMS page that appears when cookies are disabled in the browser.
  - f. If you want a breadcrumb trail to appear at the top of all CMS pages, set **Show Breadcrumbs for CMS Pages** to “Yes.”
4. When complete, tap **Save Config**.

## Workspace Controls

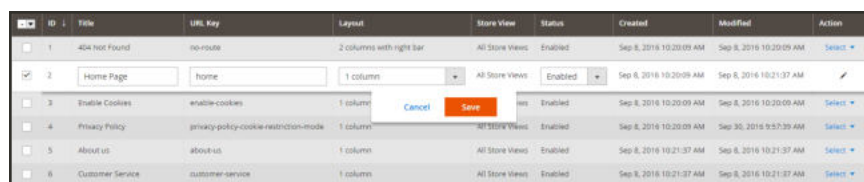
The page workspace includes tools to help you quickly find the pages you need, and commands to perform routine maintenance on individual or multiple pages. You can also quickly update page properties from the grid.



*Pages Grid*

### To quickly update page properties:


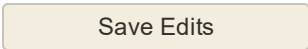
1. Click any row in the grid. To select multiple records, mark the checkbox of each row that you want to update.



*Update Page Properties*

2. Update any of the following properties:
  - Title
  - URL Key
  - Status
  - Layout
3. When complete, tap **Save**.

## Workspace Controls

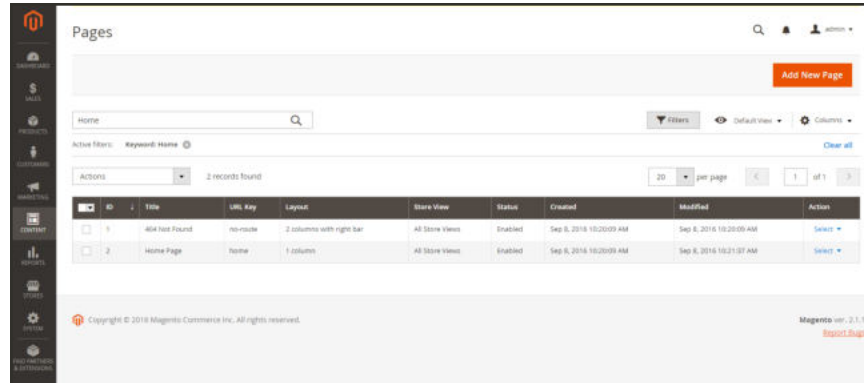
CONTROL	DESCRIPTION
	Adds a new page.
Search	Initiates a catalog search based on the current filters.
Actions	Lists all actions that can be applied to selected items in the list. To apply an action to a page, or to multiple pages, mark the checkbox in the first column of each record that is subject to the action. Options: Delete Disable Enable Edit
Select	The control in the header of the first column can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that you want to select. Options: Select All / Deselect All
	Applies the current action to selected records.
Edit	Opens the record in edit mode. You can accomplish the same thing by clicking anywhere on the row.

## Columns

COLUMN	DESCRIPTION						
Select	The checkbox in the first column is used to select multiple records: Options: Select All Deselect All						
ID	The ID is an incrementing number that is assigned to each page.						
Title	The page title appears at the top of each page.						
URL Key	The URL key is similar to a file name, and identifies the page in the URL.						
Layout	Determines if the page appears with sidebars to the right or left of the main content area. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty						
Store View	Can be used to associate the page with a specific store view.						
Status	Indicates if the page is currently online or offline. Options: Enabled / Disabled						
Created	The date the page was created.						
Modified	The data the page was last modified.						
Action	The actions that can be applied to an individual record include: <table border="0" data-bbox="695 1388 1349 1535"> <tr> <td>Edit</td> <td>Opens the page in edit mode.</td> </tr> <tr> <td>Delete</td> <td>Deletes the page.</td> </tr> <tr> <td>View</td> <td>Displays the page in preview mode.</td> </tr> </table>	Edit	Opens the page in edit mode.	Delete	Deletes the page.	View	Displays the page in preview mode.
Edit	Opens the page in edit mode.						
Delete	Deletes the page.						
View	Displays the page in preview mode.						

## Page Search

The Search box in the upper-left of the page grid can be used to find specific pages by keyword. For a more advanced search, you can **filter** the search by multiple parameters.



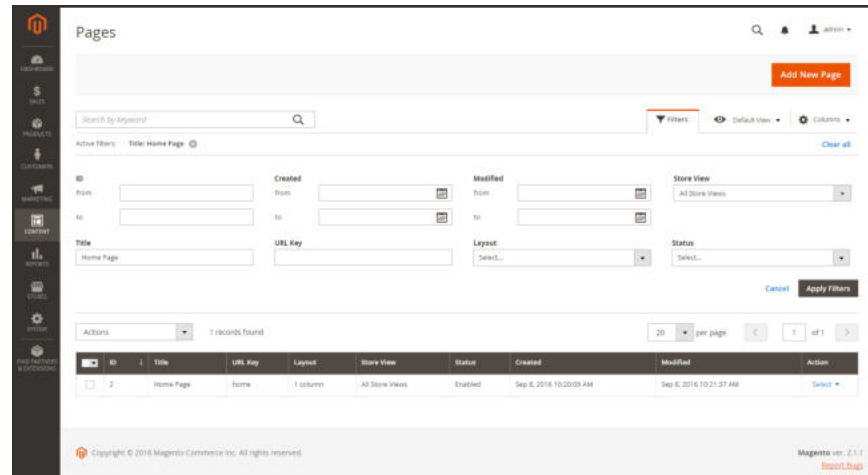
*Keyword Search Results*

### To search by keyword:

1. Enter a search term into the page search box.
2. Tap **Search** (🔍) to display the results. The results include all pages that contain the keyword.

**To filter search:**

1. If necessary, click **Clear All** to clear the previous search criteria.
2. Tap the **Filters** (▼) tab to display the selection of search filters.
3. Complete as many of the filters as necessary to describe the page(s) that you want to find.
4. Tap **Apply Filters** to display the results.

*Filtered Search*

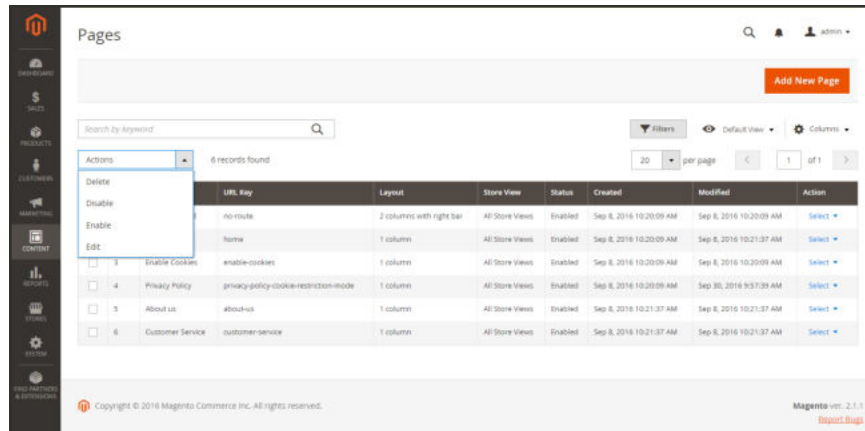
## Search Filters

FILTER	DESCRIPTION
ID	Filter the search by page record ID.
Title	Filter the search based on the page title.
URL Key	Filter the search by the URL Key.
Created	Filter the search by the date the page was created.
Modified	Filter the search based on the date the page was last modified.
Store View	Filter the search based on store view. Options: (All available Store Views)
Layout	Filter the search based on page layout. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty
Status	Filter the search on the page status. Options: Disables / Published
<input type="button" value="Apply Filters"/>	Applies all filters to the search.
<input type="button" value="Cancel"/>	Cancels the current search.
Clear All	Clears all search filters.



# Page Actions

Pages can be edited, disabled, enabled, and deleted. To apply an action to an individual page, mark the checkbox in the first column. To select or deselect all pages, use the mass actions control at the top of the column.

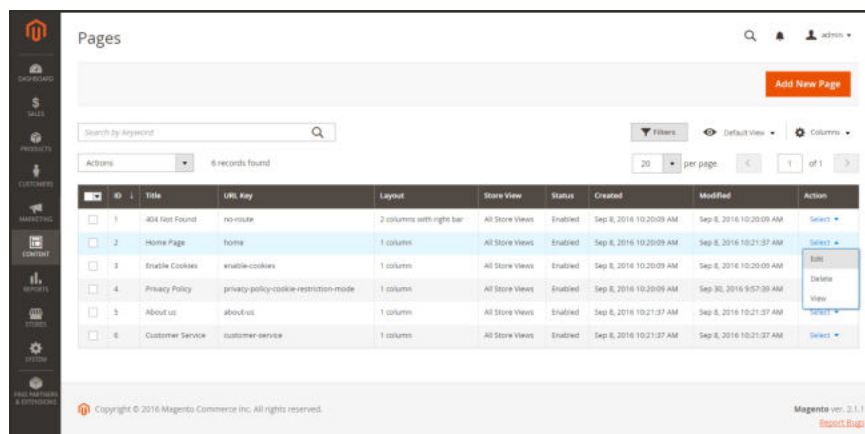


Page Actions

## To apply an action:

The Action column on the far right can be used to apply any of the following actions to the individual page:

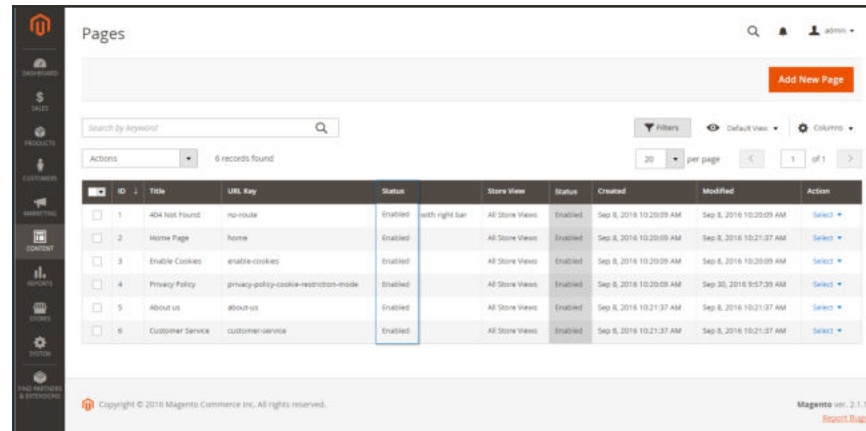
- Edit
- Delete
- View



Single Page Actions

## Page Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. To keep the new column arrangement, you can save it as a view.



*Moving a Column*

### To change the selection of columns:

In the upper-right corner, tap the **Columns** (⚙️) control. Then, do the following:

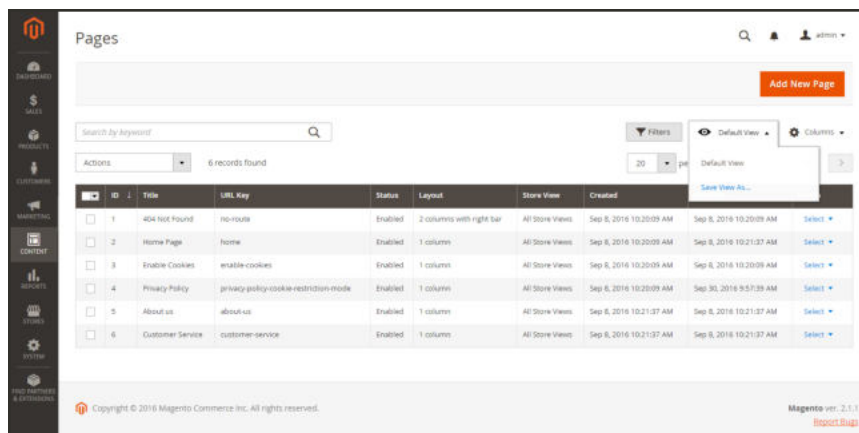
- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

### To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

## To save a view:

1. Tap the **View** (👁️) control. Then, tap **Save Current View**.



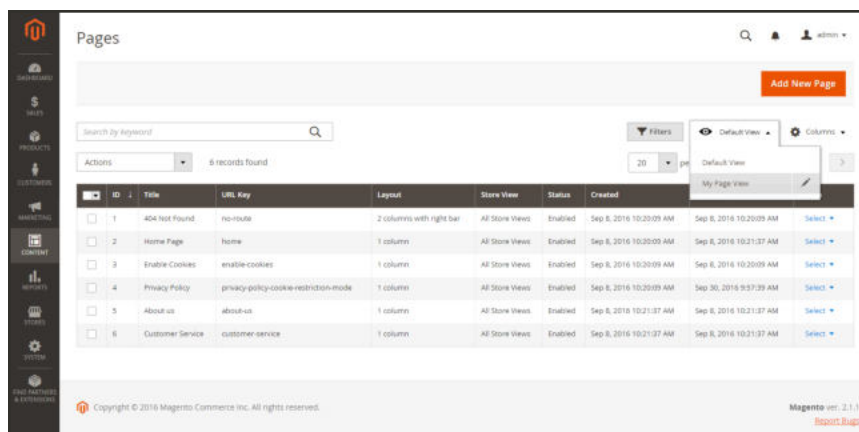
*Save Current View*

2. Enter a **name** for the view. Then, click the **arrow** (➔) to save all changes. The name of the view now appears as the current view.

## To change the view:

Tap the **View** (👁️) control. Then, do one of the following:

- Choose the view that you want to use.
- To change the name of a view, tap the **Edit** (✎) icon. Then, update the name.

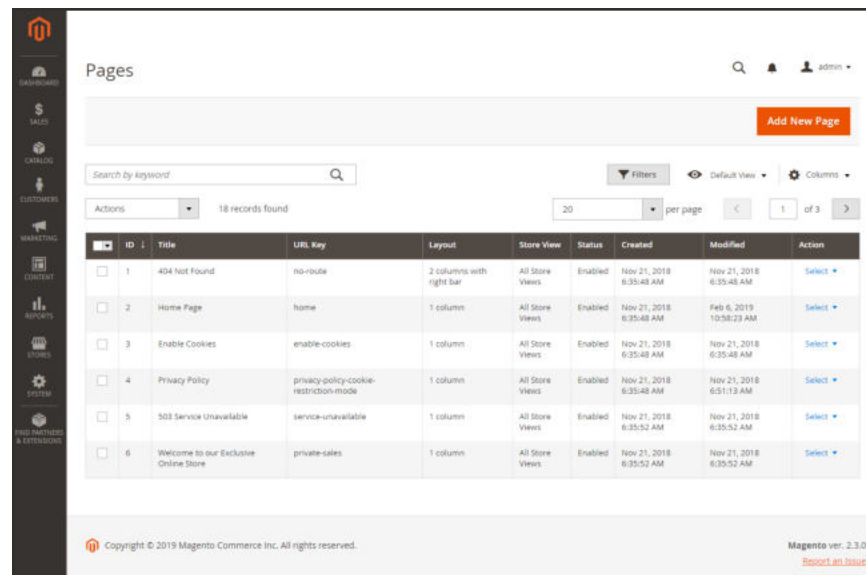


*Choose a View*

## Adding a New Page

The process of adding a new content page to your store is essentially the same for any type of page you might want to create. You can include text, images, blocks of content, variables, and widgets. Most content pages are designed to be read by search engines first, and by people second. Keep the needs of each of these two very different audiences in mind when choosing the page title, and URL, and when composing the meta data, and content.

The following instructions walk you through each step to create a basic page. Some advanced features are skipped over, but are covered in other topics.



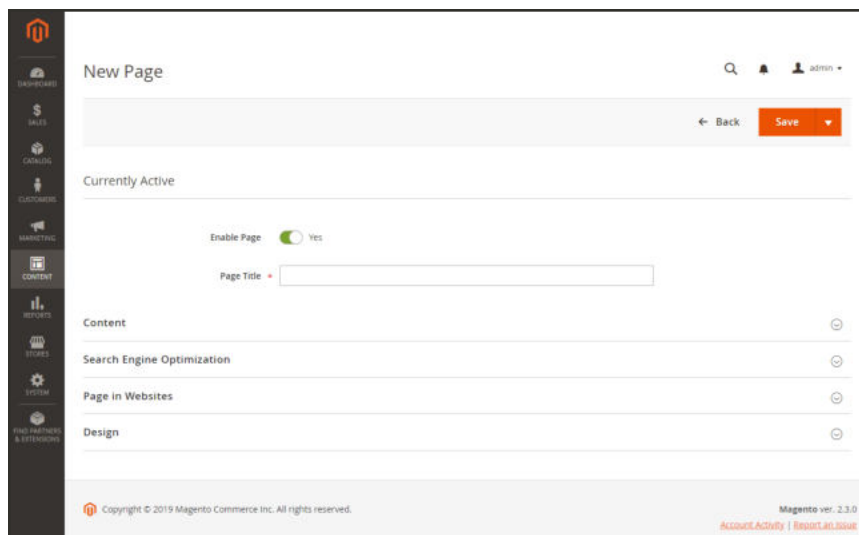
Pages

### Process Overview:



- Step 1: [Add a New Page](#)
- Step 2: [Complete the Content](#)
- Step 3: [Complete the SEO Information](#)
- Step 4: [Define the Scope](#)
- Step 6: [Preview the Page](#)
- Step 7: [Publish the Page](#)

### Step 1: Add a New Page

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. Tap **Add New Page**.



*New Page*

3. On the new page, do the following:
  - a. By default, a new page is published when the record is saved. If you do not want to publish the page immediately, set **Enable Page** to "No."
  - b. Enter the **Page Title**. The Page Title is the name that appears in the **breadcrumb trail** navigation.
4. To schedule design changes, expand  the **Custom Design Update** section. Then, do the following:
  - a. Use the calendar (  ) to choose the **From** and **To** dates when the design change is to be in effect.
  - b. If applicable, set **New Theme** to a different theme that is to be used for the page.
  - c. To change the **Page Layout**, set **New Layout** to one of the following:
    - Empty
    - 1 column
    - 2 columns with left bar
    - 2 columns with right bar
    - 3 columns



*Custom Design Update*

## Step 2: Complete the Content


1. Expand  the **Content** section.



*Content*

2. In the **Content Heading** box, type the heading that you want to appear at the top of the page.
3. By default, the editor opens in WYSIWYG mode with the toolbar at the top.
  - If you prefer to work directly with the HTML code, tap **Show / Hide Editor**.
4. Complete the content and format the text as needed. You can add **images**, **variables**, and **widgets** as needed. To learn more, see: [Using the Editor](#).
5. Tap **Save**.

## Step 3: Complete the SEO Information

1. Expand  the **Search Engine Optimization** section. Then, do the following:
  - a. When the page was saved, a default URL key was created that is based on the Content Heading. You can accept the default, or enter another **URL Key** that consists of all lowercase characters, with hyphens instead of spaces.
  - b. Enter a **Meta Title** for the page. The Meta Title should be less than seventy characters in length, and appears in the browser title bar and tab.

- c. Enter your choice of high-value **Meta Keywords** that search engines can use to index the page. Separate multiple words with a comma. Meta keywords are ignored by some search engines, but used by others.
- d. In the **Meta Description** field, enter a brief description of the page for search results listings. Ideally, the description should be from 150-160 characters in length, with a maximum limit of 255.

The screenshot shows a form titled "Search Engine Optimisation" with a close button in the top right corner. It contains four input fields: "URL Key", "Meta Title", "Meta Keywords", and "Meta Description".

*Search Engine Optimization*

- 2. Tap **Save**.

#### Step 4: Define the Scope of the Page

- 1. Expand ☺ the **Page in Websites** section.
- 2. In the **Store View** list, select each view where the page is to be available. If the installation has multiple websites, select each website and store view where the page is to be available.

The screenshot shows the "Page in Websites" section with a "Store View" dropdown menu. The dropdown menu is open, showing the following options: "All Store Views", "Main Website", "Main Website Store", "English", "French", "German", and "Spanish".

*Pages in Websites*

#### Step 6: Preview the Page

- 1. On the **Save** menu, choose **Save & Close** to return to the Pages grid..
- 2. Find the page in the grid. Then in the **Action** column, select **View**.
- 3. To return to the grid, tap **Back** in the upper-left corner of the browser window.

### Step 7: Publish the Page

1. In the **Action** column of the grid, select **Edit**.
2. Set **Enable Page** to "Yes."
3. On the **Save** menu, choose **Save & Close**.



#### *Save & Close*

Now that your page is complete, it can be added to your store navigation, linked to other pages, or added as a link in the footer of your store. You can also use it as your new **home page**.

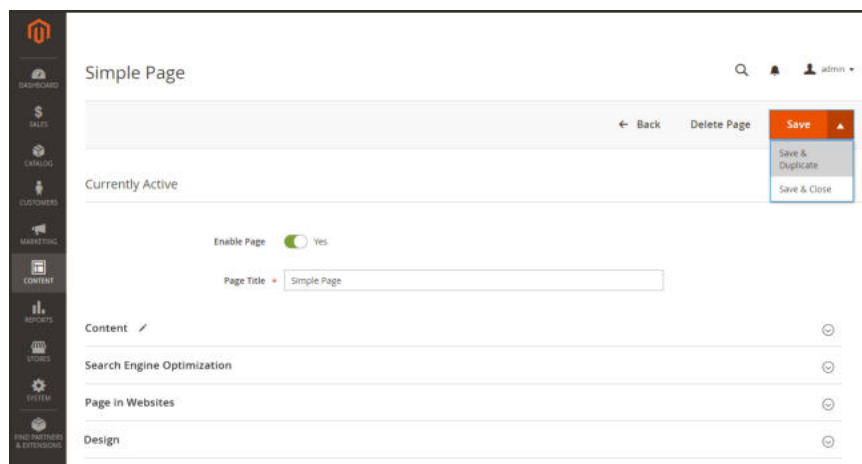
#### Save Menu

COMMAND	DESCRIPTION
Save	Save the current page, and continue working.
Save & New	Save and close the current page, and begin a new page.
Save & Duplicate	Save and close the current page, and open a new duplicate copy.
Save & Close	Save and close the current page, and return to the Pages grid.



## Duplicating a Page

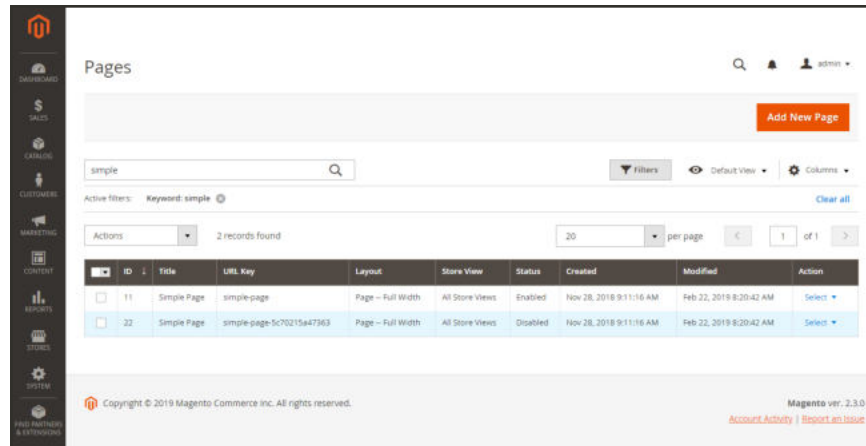
Any content page can be used as a template, and saved as a duplicate. You might use this time-saving technique to create a consistent design for content pages throughout your site. The duplicate page retains the Page Title of the original, but the URL Key and Status fields must be updated.



*Save & Duplicate*

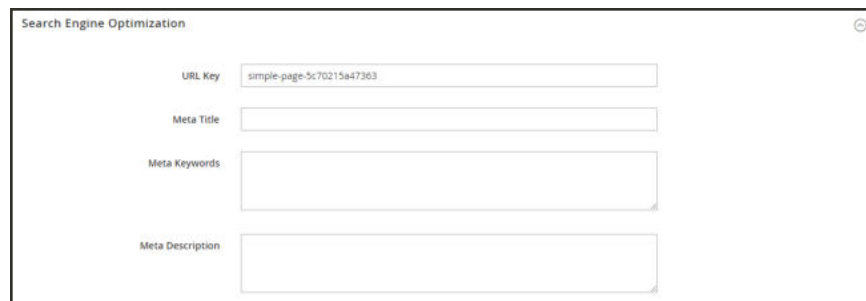
### To duplicate a page:

1. On the Admin sidebar, choose **Content**. Then under **Elements**, choose **Pages**.
2. In the grid, find the page that you want to duplicate. Then in the **Action** column, open the page in **Edit** mode.
3. On the **Save** menu, choose **Save & Duplicate**. Then, do the following:
  - a. Look for the messages that the page has been saved and duplicated. Then in the menu bar, tap **Back** to return to the grid.
  - b. Find the duplicate page in the grid, and take note of the following:
    - The Page Title is the same as the original.
    - A unique, but temporary URL Key is assigned.
    - The Status of the page is “Disabled.”



*Duplicate Page in Grid*

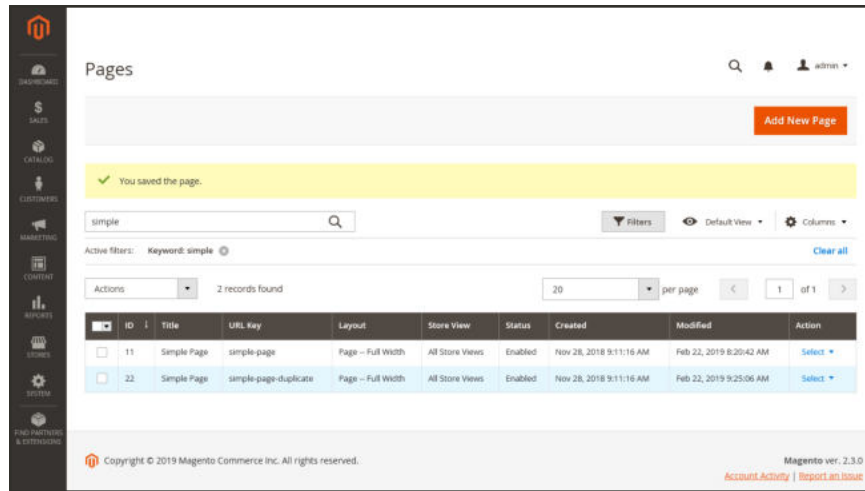
4. Open the duplicate page in **Edit** mode. Then, do the following:
  - a. If you want to publish the page at this time, set **Enable Page** to “Yes.”
  - b. Update the **Page Title**, as needed.
  - c. Expand the **Search Engine Optimization** section. Then, enter the unique **URL Key** that you want to use for the duplicate page.



*Temporary URL Key*

- d. Update the remaining page content, as needed.
5. On the **Save** menu, choose **Save & Close**.

The duplicate page in the grid reflects your changes.



*Duplicate Page with Updated URL Key*


**Save Menu**

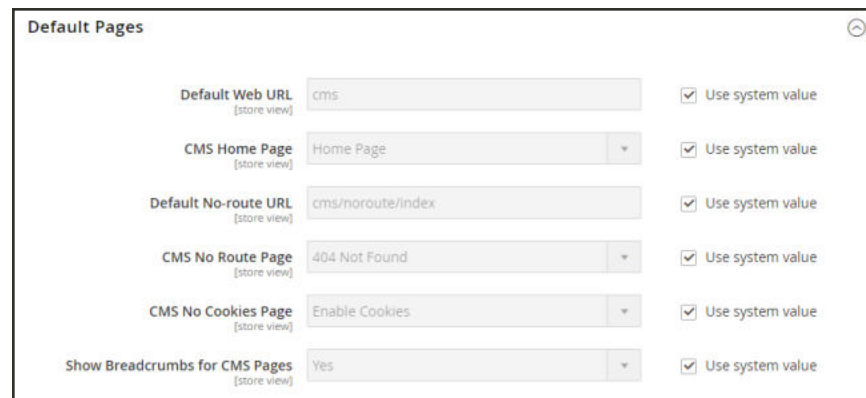
COMMAND	DESCRIPTION
Save	Save the current page, and continue working.
Save & New	Save and close the current page, and begin a new page.
Save & Duplicate	Save and close the current page, and open a new duplicate copy.
Save & Close	Save and close the current page, and return to the Pages grid.

## Switching Home Pages

You can maintain a selection of different home pages, and activate the page that you want to use as the default home page.

### To Change the Home Page:

1. Complete the steps to add a new [page](#).
2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
3. In the panel on the left under **General**, choose **Web**.
4. Expand  the **Default Pages** section. Then, do the following:



Setting	Value	Use system value
Default Web URL [store view]	cms	<input checked="" type="checkbox"/>
CMS Home Page [store view]	Home Page	<input checked="" type="checkbox"/>
Default No-route URL [store view]	cms/noroute/index	<input checked="" type="checkbox"/>
CMS No Route Page [store view]	404 Not Found	<input checked="" type="checkbox"/>
CMS No Cookies Page [store view]	Enable Cookies	<input checked="" type="checkbox"/>
Show Breadcrumbs for CMS Pages [store view]	Yes	<input checked="" type="checkbox"/>

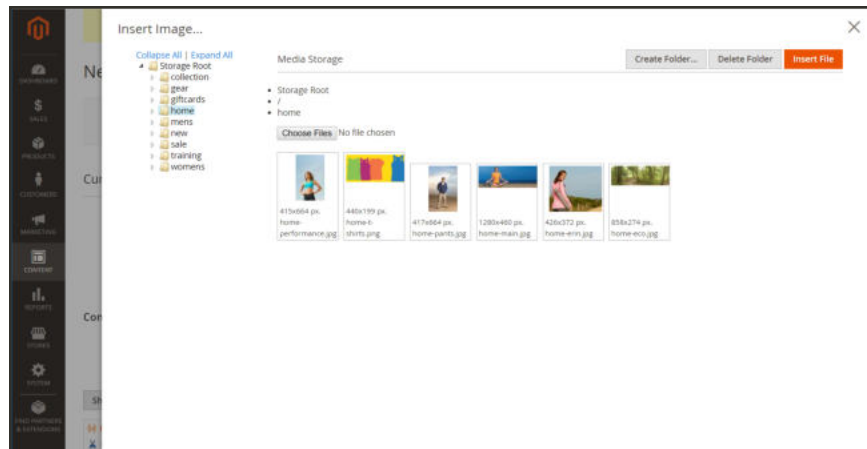
*Default Pages*

- a. Set **CMS Home Page** to the new page.
  - b. Tap **Save Config**.
5. In the message at the top of the workspace, tap the **Cache Management** link, and refresh any invalid caches.

## Media Storage

Media storage helps you organize and gain access to media files that are stored on the server. The path to the location of the files is determined by the **Base URL** configuration. Files in media storage can be accessed from the editor while working on pages and static blocks. Media storage is usually located in the file system on the same server as the Magento program files.



Alternatively, media files can be managed in a **database**, or located on a separate server or **content delivery network**. The editor can be configured to use either static or **dynamic media URLs** for catalog content in category or product descriptions.



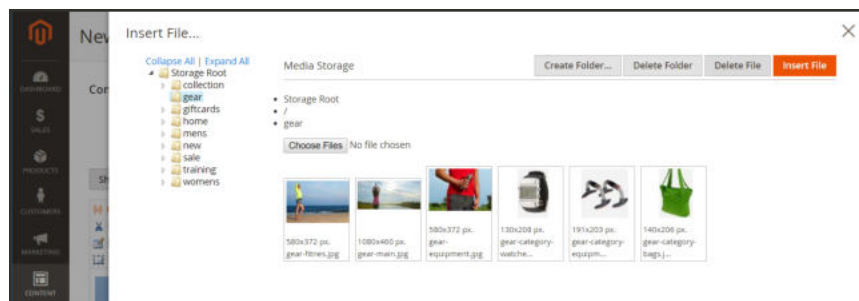
*Media Storage*

### To upload files to media storage:

The first two steps are the same as if you are inserting an image.

1. On the toolbar of the WYSIWYG editor, click **Insert Image** (  ).
2. After the **Image URL** field, click **Browse** (  ).
3. In the directory tree on the left, do one of the following:
  - Navigate to the folder where you want to save the uploaded image.
  - Navigate to the place where you want to create a new folder, and tap **Create Folder**. Then, enter the folder name, and tap **OK**.
4. To upload file(s) to media storage, tap **Choose Files**. Then, do the following:
  - a. In the directory of your local computer, navigate to the location of the images.
  - b. Select each image that is to be uploaded.
  - c. Tap **Open**.

The images are uploaded to the current media storage folder on the server.





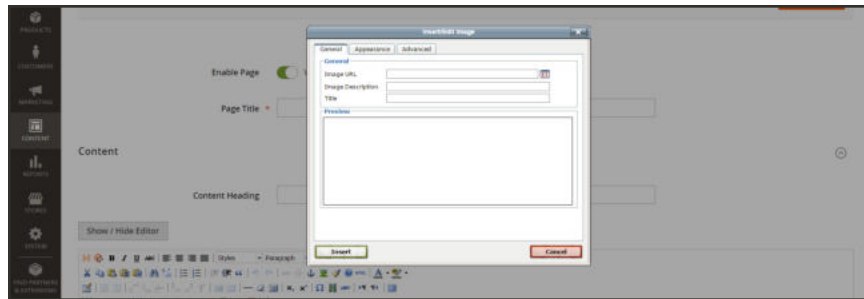
*Media Storage*

### To insert an image from media storage:

Open the page or block to be edited. Then, use one of the following methods to insert an image from media storage:

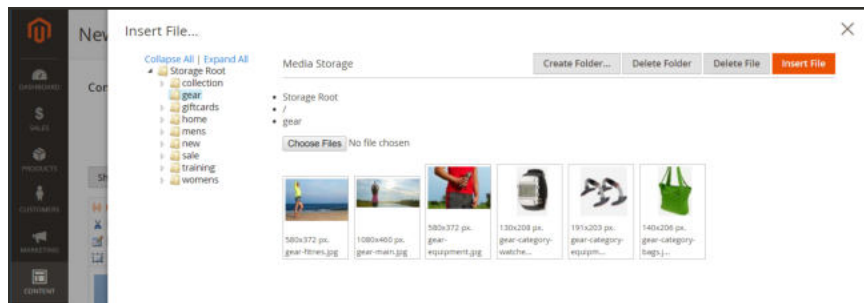
#### Method 1: From WYSIWYG Mode

1. On the toolbar of the WYSIWYG editor, click **Insert Image** (  ).
2. After the **Image URL** field, click **Browse** (  ).



*Insert Image (WYSIWYG Mode)*

3. In the directory tree on the left, navigate to the folder where the image is stored.
4. Select the tile of the image. Then, tap **Insert File**.



*Insert File*

**Method 2: From HTML Mode**

1. Position the cursor in the code where the `<img>` tag is to be inserted.
2. Tap **Insert Image**.



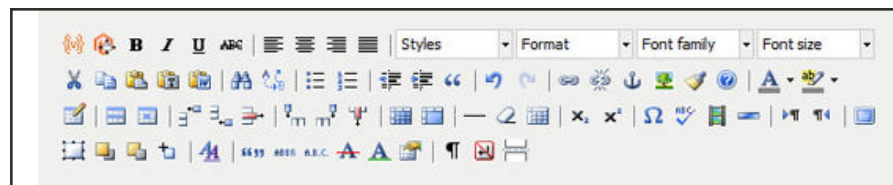
*Insert Image (HTML Mode)*



## Using the Editor

The editor gives you the ability to enter and format while working in a “What You See Is What You Get” view of the content. If you prefer to work directly with the underlying HTML code, you can easily change modes. The editor can be used to create content for **pages**, **blocks**, and **product descriptions**. When working on product detail, the editor is accessed by clicking the Show/ Hide Editor button. For a complete list of toolbar buttons, see: **Using the Editor** in the online guide.

TinyMCE 4 is now the default WYSIWYG editor. TinyMCE 3 is now deprecated, but can be enabled in the **configuration** if required for previous customizations.



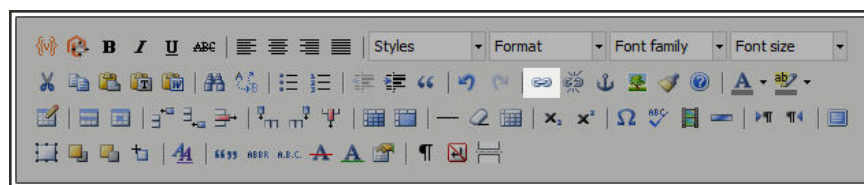
*Editor Toolbar (TinyMCE 3)*

## Inserting a Link

An easy way to insert a link is to use the Link button in the editor toolbar. It doesn't require any knowledge of HTML, and the result is the same.

### To insert a link:

1. Highlight the text where you want to create the link. Then, in the editor toolbar, tap the **Link** button.



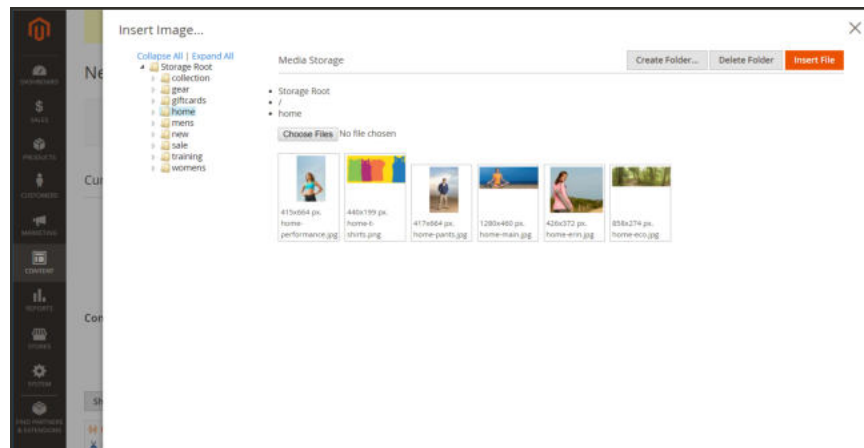
*Insert Link Button*

2. In the **Link URL** field, enter one of the following:
  - The **URL Key** of a page in your store.
  - The full **URL** of an external page to be linked.
3. Set **Target** to one of the following:
  - Open link in the same window
  - Open in a new window

4. In the **Title** field, enter the tooltip text to appear when someone hovers over the link.
5. Tap **Insert** to create the link.

## Inserting an Image

From the editor, you can insert an image that has been uploaded to **Media Storage**, or link to an image that resides on another server.



*Media Storage*

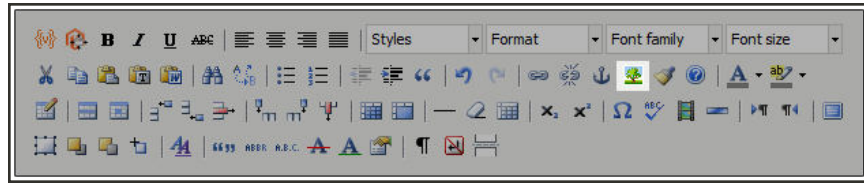
### Method 1: Insert an Image from Media Storage

1. If necessary, tap **Show / Hide Editor** to work directly with the code.
2. Position the cursor where you want the code for the image to be inserted. Then, tap **Insert Image**.
3. Choose the image that you want to use, and tap **Insert File**.
4. To view the image in WYSIWYG mode, tap **Show / Hide Editor** again.

### Method 2: Insert an Image from Another Server

Use this method to insert an image that is available online, but resides on another server. You must have the full URL of the image to complete the process.

1. If necessary, tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position your cursor where you want the image to appear.
3. On the Editor toolbar, tap the **Insert Image** button. Then, do the following:



*Insert Image Button*

- a. In the **Image URL** field, paste the full URL to the image on the other server.
  - b. In the **Image Description** field, enter a brief description of the image.
  - c. In the **Title** field, enter a relevant title for the image.
4. Tap **Insert** to complete the process.

## Inserting a Widget

The **Widget** tool can be used to add a variety of content elements to the page, including links to any content page or node, product, or category. Links can be positioned on the page in a block format, or incorporated directly into the content. You can use the Widget tool to create links to the following types of content:

- **Content Pages**
- **Catalog Categories**
- **Catalog Products**

By default, links inherit their style from the style sheet of the theme.

Inserting many directives, especially widgets like the Recently Viewed / Compared Products type, can produce a negative effect on the first page load when the page is not cached. For this reason, we advise that you use them with caution. In most cases, it should not create an issue. But this is something that you should discuss with your development team.

### To insert a widget:

1. Open the content page to be edited.
2. In the panel on the left, choose **Content**. Then, use either of the following methods:

#### Method 1: WYSIWYG Mode

1. Tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position the cursor in the text where you want the widget to appear.
3. On the editor toolbar, tap **Insert Widget**.

## Method 2: HTML Mode

From the HTML editor, tap **Insert Widget**.

3. When prompted, choose the **Widget Type**. This example shows how to insert a link to a product.
4. To use the product name, leave the **Anchor Custom Text** field empty.
5. Enter a **Anchor Custom Title** for best SEO practice. (The title isn't visible on the page.)
6. Set **Template** to one of the following:
  - To incorporate the link into text, select “Product Link Inline Template.”
  - To place the link on a separate line, select “Product Link Block Template.”
7. Tap **Select Product**, and do the following:
  - a. In the tree, navigate to the category you want.
  - b. In the list, choose the linked product.
  - c. Click **Insert Widget** to place the link on the page. In the HTML, a **markup tag** for the link appears at the top of the page, enclosed in double curly braces.
  - d. If needed, use Cut (Ctrl + x) and Paste (Ctrl + v) to position the markup tag in the code where you want the link to appear.
8. Tap **Show / Hide Editor** to see the link in WYSIWYG mode.

You can continue editing the page, and incorporate other links into the content.

## Inserting a Variable

Your store includes many predefined **variables** that can be incorporated into content pages and other communications. In addition, you can include your own **custom variables** that are specific to your needs.

### To insert a variable on a page:

1. Do one of the following:
  - Open an existing page.
  - Create a new page.
2. In the panel on the left, choose **Content**. Then from the editor, do one of the following:
  - Position the cursor where you want the variable to appear, and tap **Insert Variable**.
  - If you prefer to work with the code, click **Show / Hide Editor**. Position the insertion point in the text where you want the variable to appear. Then, tap **Insert Variable**.

3. In the list of available variables, choose the one you want to insert into the page.
4. When complete, tap **Save**.

## Configuring the Editor

The WYSIWYG editor is enabled by default, and can be used to edit content on CMS pages and blocks, and in products and categories. From the configuration you can activate or deactivate the editor, and elect to use static — rather than **dynamic — URLs** for media content in product and category descriptions.

TinyMCE 4 is now the default WYSIWYG editor. The implemented version, which is actually 4.6, offers an improved user experience, and supports a wide range of WYSIWYG plugins. TinyMCE 3 is now deprecated, but can be enabled in the configuration if required for previous customizations.

### *WYSIWYG Options*

#### To configure the editor:

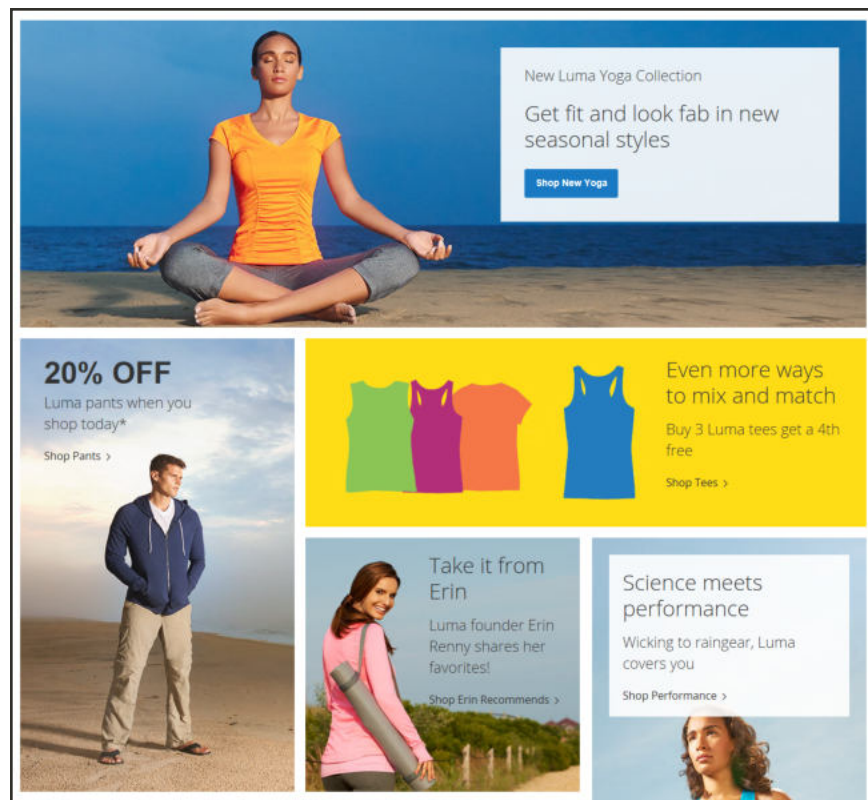
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Content Management**.
3. Expand ☺ the **WYSIWYG Options** section, and do the following:
  - a. Set **Enable WYSIWYG Editor** to your preference. The editor is enabled by default.
  - b. Set **WYSIWYG Editor** to the version of the TinyMCE editor that you want to use. TinyMCE 4 is the recommended and default editor.
  - c. Set **Static URLs for Media Content in WYSIWYG** to your preference for all **media content** that is entered with the WYSIWYG editor.
4. When complete, tap **Save Config**.

## CHAPTER 42:

# Blocks

A block is a modular unit of content that can be positioned most anywhere on the page. Content blocks are sometimes referred to as static blocks, or CMS blocks, and can be used to display fixed information such as text, images, and embedded video, as well as dynamic information from a widget or that originates in a database or other source. Most elements on the home page are blocks that can be easily managed.

You can create custom blocks of content without writing any code, and assign them to appear in a specific place in the page layout. Blocks can also be defined and positioned by making a [layout update](#) in XML code.



*Blocks on Home Page*

## Adding New Blocks

Custom blocks of content can be created, and then added to any page, group of pages, or even to another block. For example, you might place an image slider in a block, and then place the block on the home page.

The Blocks workspace uses the same **basic controls** as the Pages workspace to help you find available blocks and perform routine maintenance.

The screenshot displays the 'Blocks' workspace in a Magento administration interface. On the left is a vertical sidebar with icons for various sections: Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, and System. The main content area is titled 'Blocks' and includes a search bar, a table of existing blocks, and an 'Add New Block' button. The table lists 7 blocks with columns for ID, Title, Identifier, Store View, Status, Created, Modified, and Action.

ID	Title	Identifier	Store View	Status	Created	Modified	Action
1	Footer Links Block	footer_links_block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
2	Contact us info	contact-us-info	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
3	Sale Left Menu Block	sale-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
4	Gear Left Menu Block	gear-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
5	Men Left Menu Block	men-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:33 AM	Jan 10, 2017 9:15:33 AM	Select
6	Women Left Menu Block	women-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:34 AM	Jan 10, 2017 9:15:34 AM	Select
7	New Left Menu Block	new-left-menu-block	All Store Views	Enabled	Jan 10, 2017 9:15:34 AM	Jan 10, 2017 9:15:34 AM	Select

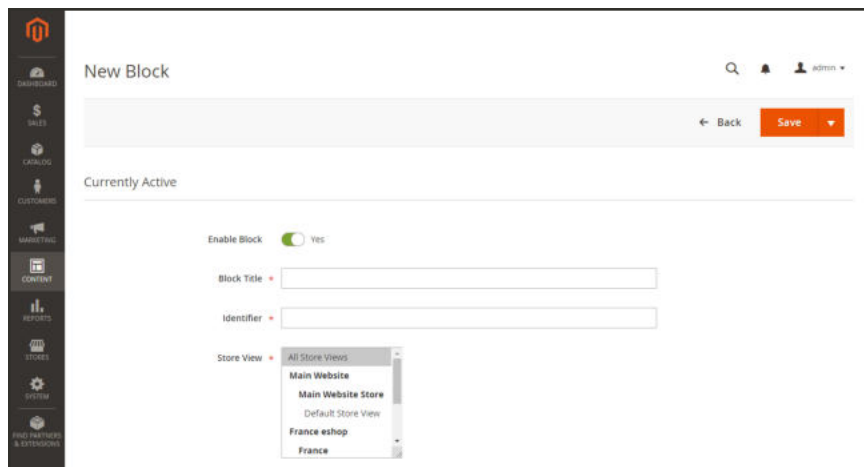
At the bottom of the interface, there is a copyright notice: 'Copyright © 2017 Magento Commerce Inc. All rights reserved.' and a version indicator: 'Magento ver. 2.1.3' with a link to 'Report Bugs'.

*Blocks Workspace*



**To create a block:**

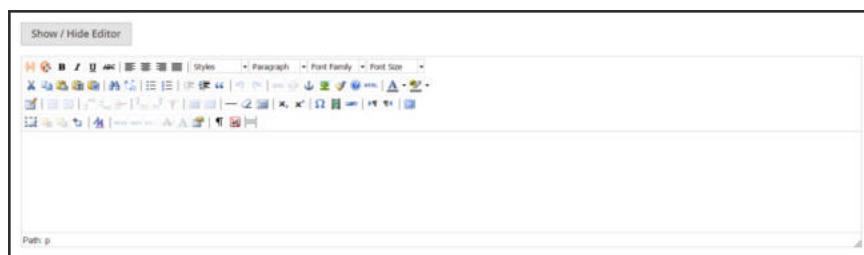
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the upper-right corner, tap **Add New Block**. Then, do the following:



*Block Detail Information*

- a. By default the status of the new block is enabled. If you want to change the status, set **Enable Block** to “No.”
  - b. Assign a **Block Title** for internal reference.
  - c. Assign a unique **Identifier** for the block. Use all lowercase characters, with underscores instead of spaces.
  - d. Select each **Store View** where the block is to be available.
3. Use the **editor** to format text, create links and tables, images, video, and audio.

If you prefer to work with the HTML code, tap **Show / Hide Editor**.



*Editor*

4. When complete, tap **Save & Close**.

The new block appears at the bottom of the list in the Blocks grid.



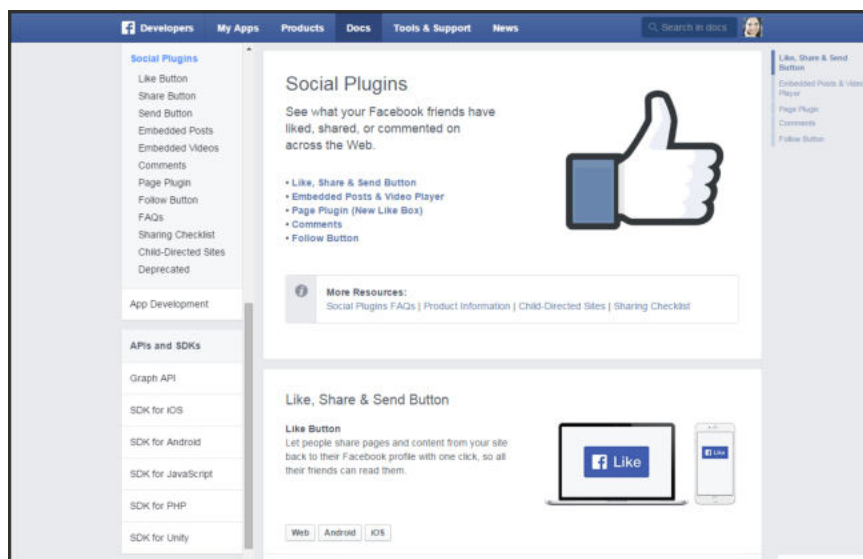
*Save & Close*

**Save Menu**

COMMAND	DESCRIPTION
Save	Save the current block, and continue working.
Save & New	Save and close the current block, and begin a new block.
Save & Duplicate	Save and close the current block, and open a new duplicate copy.
Save & Close	Save and close the current block, and return to the Blocks grid.

## Adding Social Plugins

Social networking sites have a numerous plugins that can easily be added to your store. In addition, there are many extensions on Magento Connect that can be used to integrate your store with social media. The following example shows how to add a Facebook “Like” button to your store.



*Facebook Plugins*

### Step 1: Get the Button Code

1. On the Facebook website, go to the [button setup](#) page.
2. In the **URL to Like** field, enter the URL of the page in your store that you want people to Like. For example, you might enter the URL of your store’s home page. Then, do the following:
  - a. Choose the **Layout** for the button.
  - b. Enter the **Width** in pixels that is available on your site for the button and any associated text message.
  - c. Set **Action Type** to one of the following:
    - Like
    - Recommend
3. Tap **Get Code** to copy the generated code to the clipboard.

*Like Button Setup*

## Step 2: Create a Content Block

1. Return to your store. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the upper-right corner, click tap **Add New Block**. Then, do the following:
  - a. Enter a descriptive **Block Title** for internal reference. For example: Facebook Like Button.
  - b. Assign a unique **Identifier** to the block, using all lowercase characters, and underscores instead of spaces. For example: facebook\_like\_button.
  - c. If your Magento installation has multiple store views, choose each **Store View** where the block is to be available.
  - d. Paste the snippet of code that you copied from the Facebook site into the **Content** box.
  - e. If the block is not ready to “go live,” set **Enable Block** to “No.”
3. When complete, tap **Save Block**.

## Step 3: Place the Block

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then, do the following:
  - a. In the Settings section, set **Type** to “CMS Static Block.” Then, tap **Continue**.
  - b. Verify that **Design Theme** is set to the current theme.
  - c. Tap **Continue**.
3. In the **Storefront Properties** section, do the following:

- a. In the **Widget Title** field, enter a title for internal reference.
  - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
  - c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.
4. In the Layout Updates section, tap **Add Layout Update**. Then, set **Display On** to the category, product, or page where you want the block to appear.

For example, if you choose “All Pages,” and position the block in either the header or footer, the block will appear in the same place on every page of the store.

To place the block on a specific page, do the following:

- a. Set **Display On** to “Specified Page.” Then, select the **Page** where you want the block to appear.
  - b. Choose the **Block Reference** to identify the place on the page where the block is to be placed.
  - c. Accept the default setting for **Template**, which is set to “CMS Static Block Default Template.”
  - d. Tap **Save and Continue Edit**.
5. In the panel on the left, choose **Widget Options**.
  6. Tap **Select Block...** Then in the list, choose the block that you want to place.
  7. When complete, tap **Save**.
  8. When prompted, follow the instructions at the top of the workspace to update the index and page cache.

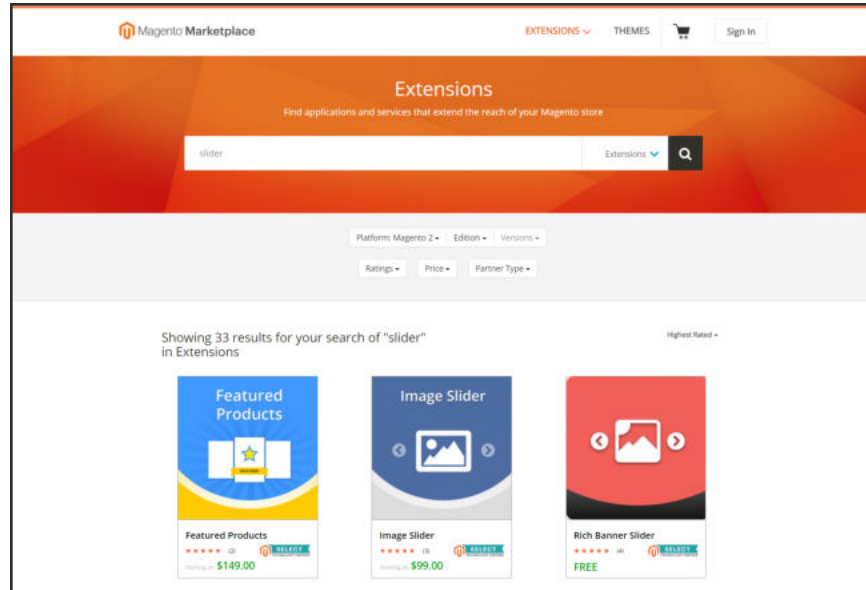
The widget now appears in the Widgets grid.

#### Step 4: Verify the Location in Your Store

Return to your storefront to verify that the block is in the correct location. To move the block, you can reopen the widget try a different page or block reference.

## Adding a Lightbox or Slider

There is a wide assortment of jQuery-based image lightboxes, sliders, and carousels available on [Magento Marketplace](#), and some are free.



*Slider Extensions*

To add a lightbox or slider to your store, download the extension from Magento Marketplace, and follow the instructions to [install the extension](#). For additional help, see the documentation provided by the developer.

## Positioning Blocks

The code that controls the page layout and placement of blocks is written in XML **Widgets** make it easy to position a block at a specific place on the page, and even for a specific product or category without writing any code. You can choose each option from a list, rather than trying to remember all of the possible combinations.

The following list shows the locations by page type where blocks are typically placed. To learn more about how areas on the page are defined, see: [Standard Page Layouts](#).

### Category and CMS Pages

BLOCK REFERENCE	POSITION
Breadcrumbs	The navigation aid at the top of many pages that shows your current location as a link. Any additional content placed in the Breadcrumbs reference floats to the right of the breadcrumbs, if displayed.
Left Column	Content is added to the left column.
Main Content Area	Content is added to the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
Right Column	Content appears in the right column.
Store Language	Content appears in the upper-left corner of the header.

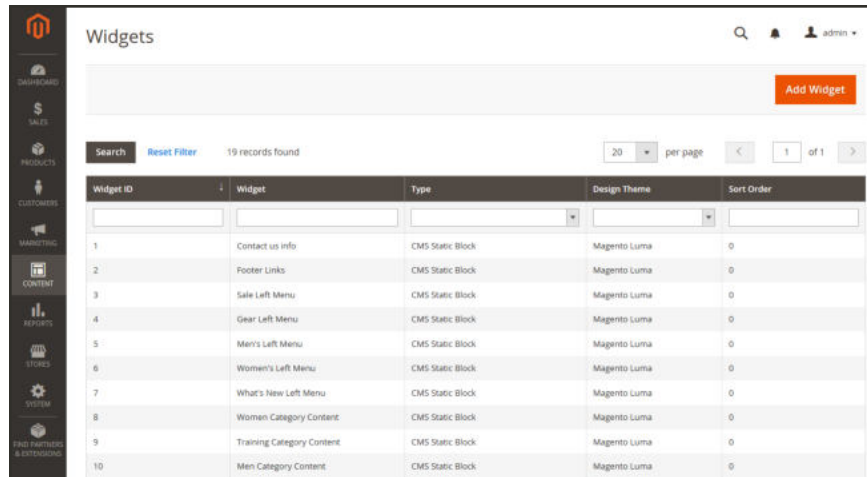
## Product Page

BLOCK REFERENCE	POSITION
Alert URLs	Content appears below the title of the product on the product detail page.
Bottom Block Options Wrapper	If custom options are added, content appears below the Add to Cart button.
Breadcrumbs	Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that's showcased below the navigation bar.
Info Column Options Wrapper	If a custom options are added, content appears to the right. The same location applies to configurable options.
Left Column	Content appears below the left column blocks.
Main Content Area	Content appears below the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
PayPal Express Checkout (Payflow Edition) Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
PayPal Express Checkout Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
Product Tags List	Content appears below the products tag bar.
Product View Extra Hint	Content appears below the main top price of the product.
Right Column	Content appears below the right column blocks.
Store Language	Content appears to the right of the language chooser.
Tags List Before	Content appears above the Add Your Tags field.



## Using a Widget

The CMS Static Block widget gives you the ability to place an existing **content block** most anywhere in your store.



Widget ID	Widget	Type	Design Theme	Sort Order
1	Contact us info	CMS Static Block	Magento Luma	0
2	Footer Links	CMS Static Block	Magento Luma	0
3	Sale Left Menu	CMS Static Block	Magento Luma	0
4	Gear Left Menu	CMS Static Block	Magento Luma	0
5	Men's Left Menu	CMS Static Block	Magento Luma	0
6	Women's Left Menu	CMS Static Block	Magento Luma	0
7	What's New Left Menu	CMS Static Block	Magento Luma	0
8	Women Category Content	CMS Static Block	Magento Luma	0
9	Training Category Content	CMS Static Block	Magento Luma	0
10	Men Category Content	CMS Static Block	Magento Luma	0

### Process Overview:

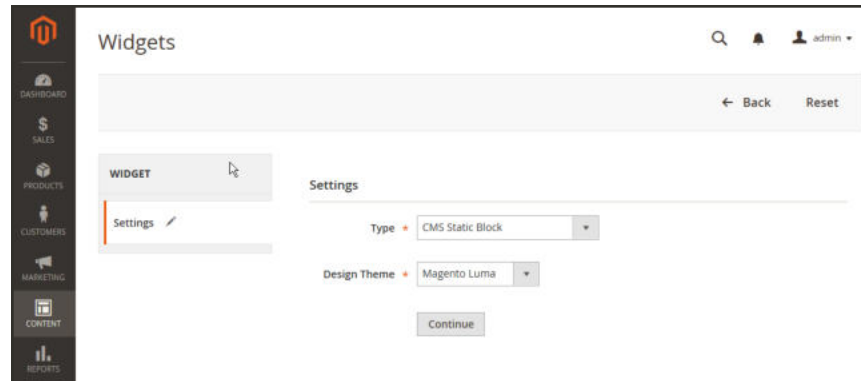
Step 1: **Choose the Type**

Step 2: **Complete the Layout Updates**

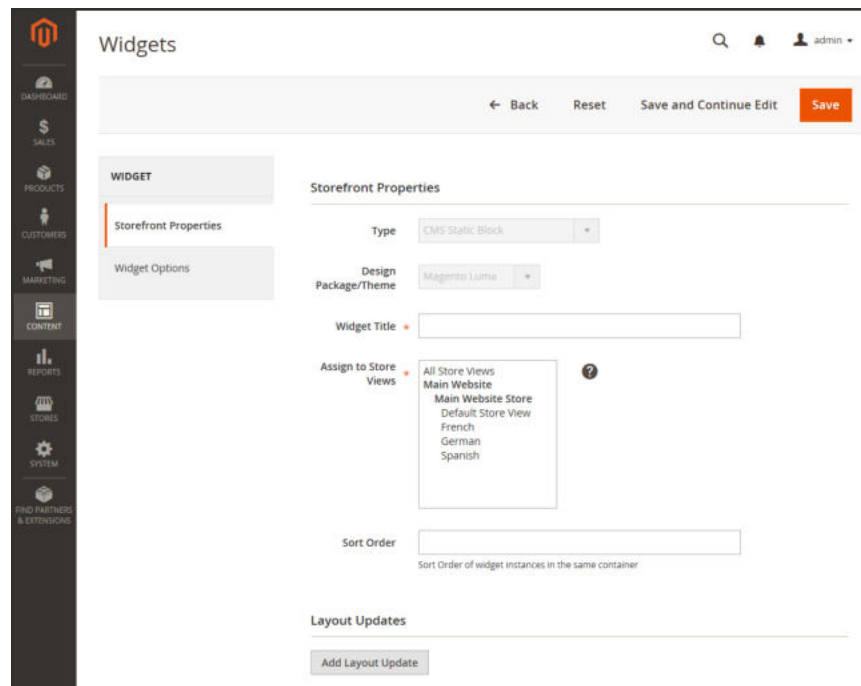
Step 3: **Place the Block**

### Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then do the following:
  - a. In the Settings section, set **Type** to “CMS Static Block.” Then, tap **Continue**.
  - b. Verify that **Design Theme** is set to the current theme.
  - c. Tap **Continue**.

*Settings*

3. In the Storefront Properties section, do the following:
  - a. In the **Widget Title** field, enter a descriptive title for internal reference.
  - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
  - c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.

*Storefront Properties*

## Step 2: Complete the Layout Updates

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
2. Set **Display On** to the category, product, or page where you want the block to appear. To place the block on a specific page, do the following:
  - a. Choose the **Page** where you want the block to appear.
  - b. Choose the **Block Reference** that identifies the place on the page where the block is to be placed.
  - c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."

The screenshot shows a form titled "Layout Updates". At the top, there is a "Display on" dropdown menu with "Specified Page" selected. Below this, there are three columns of settings: "Page" with a dropdown set to "CMS Home Page", "Container" with a dropdown set to "Main Content Area", and "Template" with the text "CMS Static Block Default Template". At the bottom of the form is a button labeled "Add Layout Update".

*Layout Updates*

## Step 3: Place the Block

1. In the panel on the left, select **Widget Options**.
2. Tap **Select Block...**. Then in the list, choose the block that you want to place.
3. When complete, tap **Save**.  
The app now appears in the list.
4. When prompted, follow the instructions at the top of the workspace to update the index and page cache.
5. Return to your storefront to verify that the block appears in the correct location. To move the block, you can reopen the frontend app try a different page or block reference.

## Using a Layout Update

Blocks can be placed in the left or right sidebar of a specific page by making a **layout update** to the XML code. With a few simple changes to the code, you can position the block in either sidebar, and control its position in relation to other blocks.

The term **callout**<sup>1</sup> is sometimes used to refer to a block that is defined as a layout update with XML code. The term **sidebar**<sup>2</sup> refers to the left or right columns of the page layout. When entering layout update code, make sure to follow the syntax exactly as shown in the example.

To place a block in the sidebar, the page must have a two-or three-column layout. To learn more, see: [Page Layout](#).

### To place a block in the sidebar of a page:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the grid, find the block you want to place, and take note of its **Identifier**. Make sure that you have the correct spelling.
3. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
4. Find the page where you want to place the block, and open the page in edit mode.
5. In the panel on the left, choose **Design**. Then, do the following:
  - a. In the **Layout Update XML** box, enter the code for the right or left sidebar.

#### Code for CMS Block in Sidebar

```
<reference name="right">
<block type="cms/block" name="right.permanent.callout">
<action method="setBlockId"><block_id>your-block-id</block_id></action>
</block>
</reference>
```

- b. Change the **reference name** to identify either the “right” or “left” column, according to the layout of the page.
  - c. Change the **block\_id** to the identifier of the block that is being placed.
6. When complete, tap **Save Page**.

<sup>1</sup>A term that is sometimes used to describe a block that is defined as a layout update using XML code.

<sup>2</sup>The right or left column of a two-column page layout.

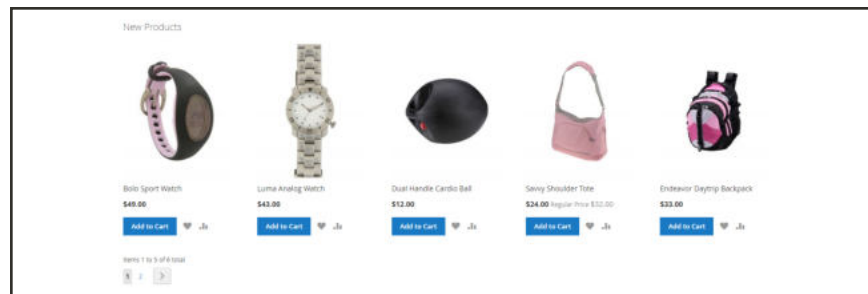
## CHAPTER 43:

# Widgets

A widget is a snippet of code that makes it possible to display a wide range of content and place it at specific block references in your store. Many display real-time, dynamic data and create opportunities for your customers to interact with your store. The Widget tool makes it easy to place existing content such as blocks with images and text, and interactive elements most anywhere in your store.

You can use widgets to create landing pages for marketing campaigns, display promotional content at specific locations throughout the store. Widgets can also be used to add interactive elements and action blocks for external review systems, video chats, voting, and subscription forms, or to provide navigation elements for tag clouds and image sliders.

Inserting many directives, especially widgets like the Recently Viewed / Compared Products type, can produce a negative effect on the first page load when the page is not cached. For this reason, we advise that you use them with caution. In most cases, it should not create an issue. But this is something that you should discuss with your development team.



*New Product List Widget*

# Widget Types

## Widgets

TYPE	DESCRIPTION
CMS Page Link	Displays a link to a specific CMS page. Allows you to specify custom text and title. When the link is complete, it can be used in content pages and blocks.
CMS Static Block	Displays a block of content at a specific location on a page.
Catalog Category Link	Displays either an inline or block-style link to a selected catalog category. When the link is complete, it can be used in content pages and blocks.
Catalog New Products List	Displays a block of products which have been designated as new, for the duration of time specified in the product record.
Catalog Product Link	Displays either an inline or block-style link to a selected catalog product. When the link is complete, it can be used in content pages and blocks.
Catalog Products List	Displays a list of products from the catalog.
Dynamic Blocks Rotator	Can be used to display a single dynamic block, or an assortment of dynamic blocks in a series, random order, or shuffled. The dynamic block can be triggered by a <b>price rule</b> , and placed on a specific page and location, or configured to appear on all pages.
Orders and Returns	Gives guests the ability to check the status of their orders and submit requests to return merchandise. The widget appears only for guests and customers who are not logged in to their accounts.
Recently Compared Products	Displays the block of recently compared products. You can specify the number of products included, and format them as a list or product grid.
Recently Viewed Products	Displays the block of recently viewed products. You can specify the number of products included, and format them as a list or product grid.

## Creating a Widget

The process of creating a widget is nearly the same for each type. You can follow the first part of the instructions, and then complete the last part for the specific type of widget.

Widget ID	Widget	Type	Design Theme	Sort Order
1	Contact us Info	CMS Static Block	Magento Luma	0
2	Footer Links	CMS Static Block	Magento Luma	0
3	Sale Left Menu	CMS Static Block	Magento Luma	0
4	Gear Left Menu	CMS Static Block	Magento Luma	0
5	Men's Left Menu	CMS Static Block	Magento Luma	0
6	Women's Left Menu	CMS Static Block	Magento Luma	0
7	What's New Left Menu	CMS Static Block	Magento Luma	0
8	Women Category Content	CMS Static Block	Magento Luma	0
9	Training Category Content	CMS Static Block	Magento Luma	0
10	Men Category Content	CMS Static Block	Magento Luma	0

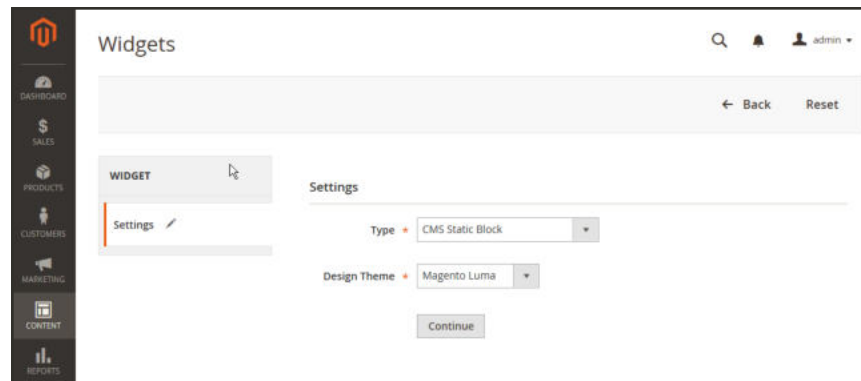
*Widgets*

### Process Overview:

- Step 1: **Choose the Type**
- Step 2: **Specify Where It Goes**
- Step 3: **Complete the Options**
- Step 4: **Check It Out!**

## Step 1: Choose the Type

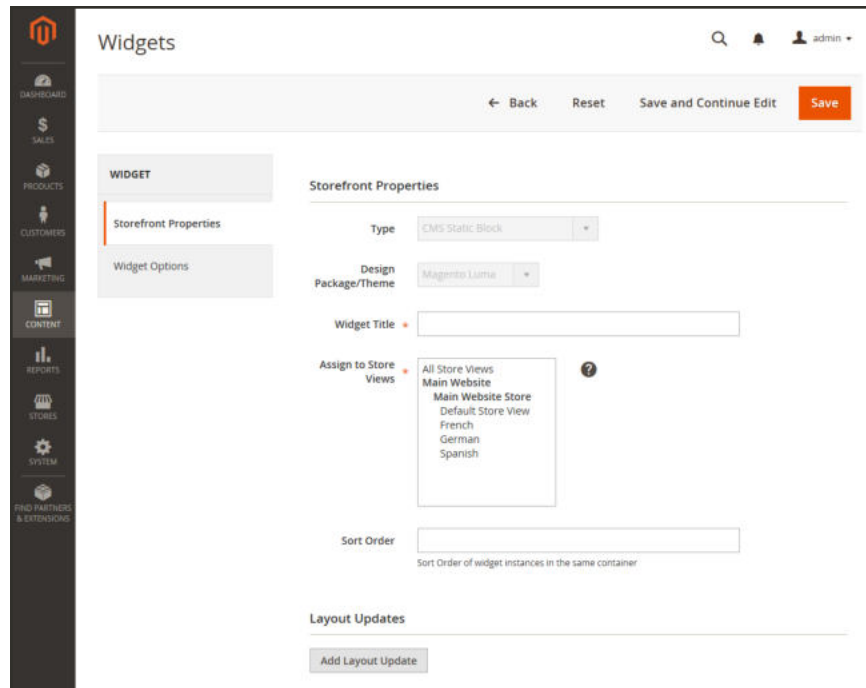
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. Tap **Add Widget**. Then, do the following;
  - a. In the Settings section, set **Type** to the type of widget that you want to create. Then, tap **Continue**.
  - b. Verify that **Design Theme** is set to the current theme.
3. Tap **Continue**.



*Widget Settings*



4. Under **Storefront Properties**, do the following:
  - a. In the **Widget Title** field, enter a descriptive title for internal reference only.
  - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
  - c. Enter a number in the **Sort Order** field to determine the order of the block if it appears in the same location as other content elements. The top position is zero.



*Storefront Properties*

## Step 2: Specify Where It Goes

1. In the Layout Updates section, tap **Add Layout Update**.
2. Set **Display On** to the type of page where it is to appear.
3. In the **Block Reference** list, choose the area of the page layout where it is to be placed.

The screenshot shows a 'Layout Updates' configuration interface. At the top, there is a 'Display on' dropdown menu currently set to 'Specified Page'. Below this, there are three columns of configuration options: 'Page' (set to 'CMS Home Page'), 'Container' (set to 'Main Content Area'), and 'Template' (set to 'CMS Static Block Default Template'). At the bottom of the panel is a button labeled 'Add Layout Update'.

*Layout Updates*

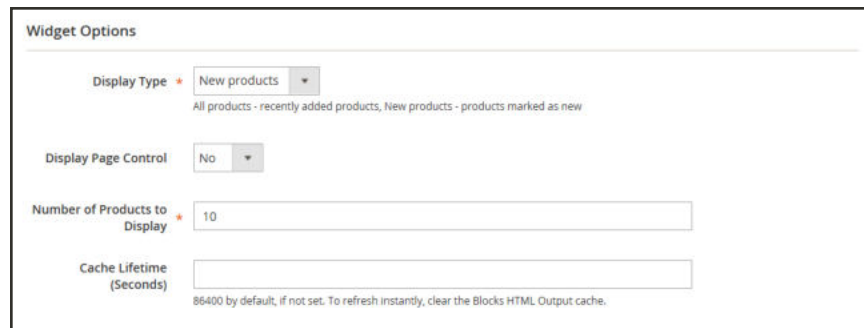
4. If the widget is a link, set **Template** to one of the following:
 

Block Template	Formats the content so it can be placed as standalone unit on the page.
Inline Template	Formats the content so it can be placed inside other content. For example, a link that goes inside a paragraph of text.

## Step 3: Complete the Options

The options for each widget type vary slightly, but the process is essentially the same. The following example displays the product list for a specific category, with pagination controls.

1. In the panel on the left, choose **Widget Options**.
2. Tap **Select Block**.
3. Enter a **Title** to appear above the list. For example, “Featured Products.”
4. For pagination controls, set **Display Page Control** to “Yes.” Then, do the following:
  - a. Enter the **Number of Products per Page**.
  - b. Enter the total **Number of Products to Display**.
  - c. Set **Condition** to the category of products to be featured. The process is the same as setting a condition for a **price rule**.



**Widget Options**

Display Type \* New products ▼  
All products - recently added products, New products - products marked as new

Display Page Control No ▼

Number of Products to Display \* 10

Cache Lifetime (Seconds)   
86400 by default, if not set. To refresh instantly, clear the Blocks HTML Output cache.

*Widget Options*

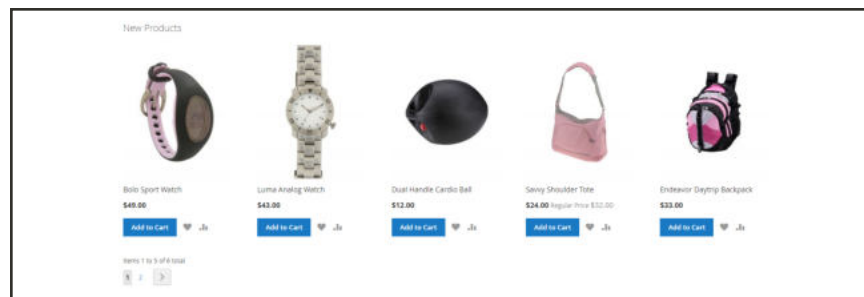
5. When complete, tap **Save**.
6. When prompted, follow the instructions at the top of the workspace to update the cache, as needed.

#### **Step 4: Check It Out!**

Return to your storefront to verify that the widget is working correctly. To move it to a different location, you can reopen the widget and try a different page or block reference.

## New Products List

The list of new products is an example of dynamic content, and consists of live data that is pulled from your product catalog. By default, the “New Products” list includes the first eight of the most recently added products. However, it can also be configured to include only products within a specified date range.



*New Products List on Home Page*

### Process Overview:

- Step 1: **Set the Date Range for Each Product**
- Step 2: **Create the Widget**
- Step 3: **Choose the Location**
- Step 4: **Configure the List**
- Step 5: **Preview Your Work**

### Step 1: Set the Date Range for Each Product

To make a product appear in the list by date range, the “New From” dates must be entered in the product. The product then appears in the New Products list during the date range specified.

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find each product that you want to feature, and open in edit mode. Then, do the following:
  - a. In the **Set Product as New From** field, tap the calendar (📅). Then, choose the first date that you want the product to be featured.
  - b. In the **To** field, tap the calendar (📅). Then, choose the last date that you want the product to be featured.



*"Set Product As New " Date Range*

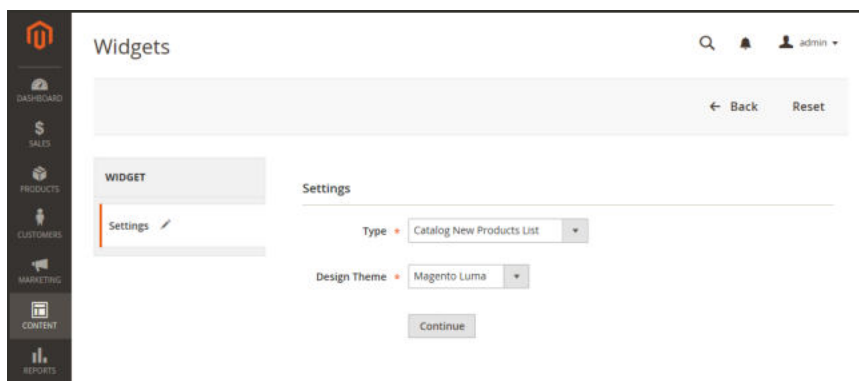
3. When complete, tap **Save**.
4. When you are prompted to reindex and refresh the page cache, click the links at the top of the workspace, and follow the instructions.

The list of products now appears on the Home Page for the specified date range.

### Step 2: Create the Widget

The code that determines the content of the New Products list and its placement in your store is generated by the Widget tool.

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**.
3. In the Settings section, do the following:
  - a. Set **Type** to “Catalog New Products List.”
  - b. Choose the **Design Theme** that is used by the store.
4. Tap **Continue**.



*Widget Type*

5. In the **Storefront Properties** section, complete the following fields:

Widget Title	Enter a descriptive title for your widget. This title is visible only from the Admin.
Assign to Store Views	Select the store views where the widget will be visible. You can select a specific store view, or "All Store Views."
Sort Order	(Optional) Enter a number to determine the order this items appears with others in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)

The screenshot shows the 'Storefront Properties' configuration form. It has the following fields and options:

- Type:** Catalog New Products List (dropdown)
- Design Package/Theme:** Magento Luma (dropdown)
- Widget Title:** New Products List (text input)
- Assign to Store Views:** A dropdown menu with a question mark icon. The visible options are: All Store Views, Main Website, Main Website Store, Default Store View, French, German, and Spanish.
- Sort Order:** (text input) with a tooltip: "Sort Order of widget instances in the same container"
- Layout Updates:** A section containing an "Add Layout Update" button.

*Storefront Properties*

### Step 3: Choose the Location

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
  - a. Set **Display On** to "Specified Page."
  - b. Set **Page** to "CMS Home Page."
  - c. Set **Block Reference** to "Main Content Area."
  - d. Set **Template** to one of the following:
    - New Product List Template
    - New Products Grid Template

The screenshot shows a 'Layout Updates' form. At the top, there's a 'Display on' dropdown menu with 'Specified Page' selected. Below this, there are three columns of dropdown menus: 'Page' with 'CMS Home Page', 'Container' with 'Main Content Area', and 'Template' with 'New Products Grid Templ'. At the bottom of the form is a button labeled 'Add Layout Update'.

*Layout Updates*

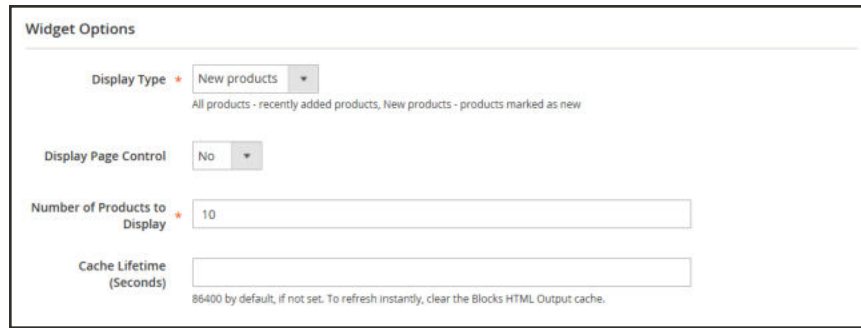
2. Tap **Save and Continue Edit**.

For now, you can ignore the message to refresh the cache.

### Step 4: Configure the List

1. In the panel on the left, choose **Widget Options**. Then, do the following:
2. Set **Display Products** to one of the following:
 

All Products	Lists products in sequence, starting with those most recently added.
New Products	Lists only the products which are identified as “New.” A product is considered to be new during the date range that is specified in the “Set Product As New From/To” fields. The list will be empty if the date range expires without any new products defined.
3. Complete the remaining information as follows:
  - a. To provide navigation control for lists with multiple pages, set **Display Page Control** to “Yes.” Then, in the **Number of Products per Page** field, enter the number of products you want to appear on each page.
  - b. Set **Number of Products to Display** to the number of new products that you want to include in the list. The default setting is 10.
  - c. In the **Cache Lifetime (Seconds)** field, choose how often you want to refresh the list of new products. By default, the cache is set to 86400 seconds, or 24 hours.



*Widget Options*

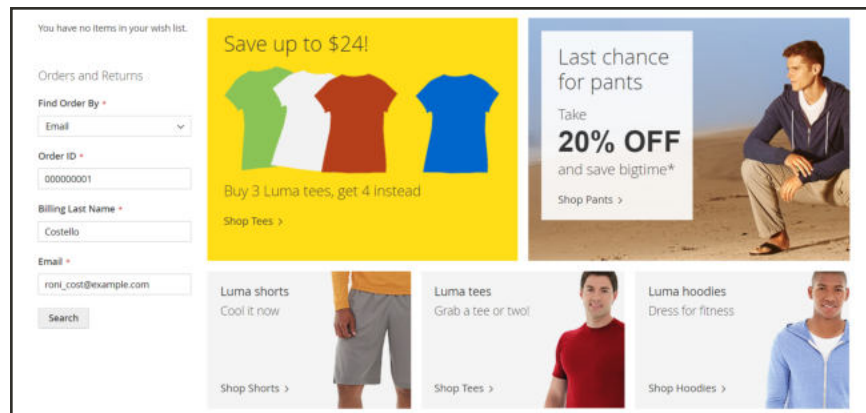
4. When complete, tap **Save**.
5. When prompted to refresh the cache, click the link in the message at the top of the workspace, and follow the instructions.

**Step 5: Preview Your Work**

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. Find the page in the grid where the New Products list is to appear. Then, in the **Action** column, click the **Preview** link.

## Orders and Returns Widget

The Orders and Returns widget gives guests the ability to check the status of their orders, print invoices, and track shipments. When the widget is added to the storefront, it is visible only for guests and for customers who are not logged in to their accounts. Guests can find orders by providing the Order ID, Billing Last Name, and either the Email Address or ZIP Code.



*Orders and Returns Widget in Sidebar*



### To use the Orders and Returns Widget:

1. Choose one of the following fields to be used to find the order:
  - Email Address
  - ZIP Code
2. Enter the **Order ID** and **Billing Last Name**. Then, enter either the billing **Email Address** or **ZIP Code** that is associated with the order.
3. Tap **Search** to retrieve the order.

The screenshot shows the LUMA website's order confirmation page. At the top, there's a navigation bar with 'What's New', 'Women', 'Men', 'Gear', 'Training', and 'Sale'. Below that, the order details are displayed: Order # 000000001, dated May 26, 2017, with a 'PROCESSING' status. A table lists the items ordered, including 'Iris Workout Top-XS-Red' with a price of \$0.00. The grand total is \$36.39. Below the table, there's a section for 'Order Information' with details for Shipping Address, Shipping Method, Billing Address, and Payment Method.

Product Name	SKU	Price	Qty	Subtotal
Iris Workout Top-XS-Red	WS03-XS-Red	\$0.00	Ordered: 1 Shipped: 1	\$0.00
				Subtotal
				\$29.00
				Shipping & Handling
				\$5.00
				Tax
				\$2.39
				<b>Grand Total</b>
				<b>\$36.39</b>

*Order Information*

### To set up the Orders and Returns widget:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**.
3. In the Settings section, do the following:
  - a. Set **Type** to “Orders and Returns”.
  - b. Choose the **Design Theme** that is used by the store.
4. Tap **Continue**.

5. In the **Storefront Properties** section, complete the following fields:

Widget Title	Enter a descriptive title for your widget. This title is visible only from the Admin.
Assign to Store Views	Select the store views where the widget will be available. You can select a specific store view, or "All Store Views."
Sort Order	(Optional) Enter a number to determine the relative order of this item when it appears with other content in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)

6. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
  - a. Set **Display On** to the type of page where the widget is to appear.
  - b. Complete the rest of the layout update information to determine where the widget is to appear on the page.
7. When complete, tap **Save**. Then when prompted, refresh each invalid cache.

## Design & Theme

## Contents

Your store's theme is like a window dressing that can be changed for a season or promotion. In this section, you will learn about page layouts, how to make simple HTML changes, and apply a new theme to your store.

### Design Menu

#### Page Setup

- HTML Head

- Header

- Footer

### Page Layout

- Standard Page Layouts

- Storefront Examples

- Layout Updates

  - Standard Block Layout

  - Layout Update Examples

  - Layout Update Syntax

  - Controlling Block Order

  - XML Load Syntax

### Themes

- Using the Default Theme

- Installing a New Theme

- Theme Assets

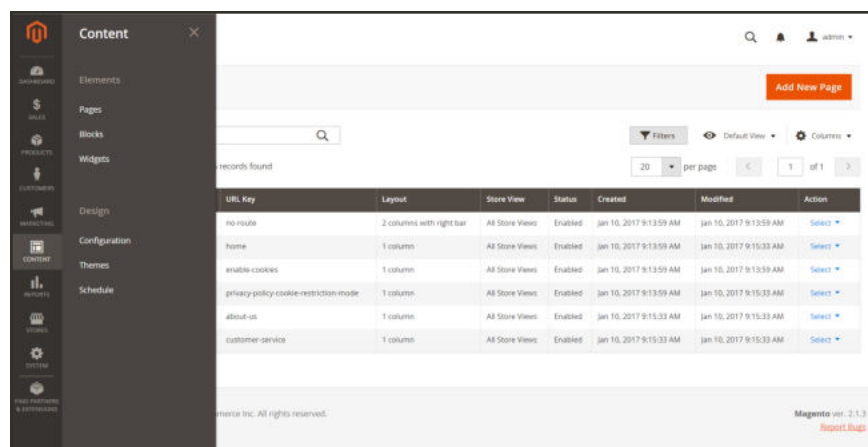
- Scheduling Design Changes

## CHAPTER 44:

# Design Menu

Magento provides a variety of easy-to-use design options that you can use to make simple changes to your store. In addition, you will find many professionally designed themes available on Magento Connect. Like the window dressing of your store, you can change the theme for the season or for a promotion.

More advanced users appreciate the flexibility of working with an object-oriented environment that assembles pages from separate components. After you understand the basics, you'll appreciate working in such a flexible and fluid environment. To learn more, see the [Frontend Developer Guide](#).



*Design Menu*

### To display the Design menu:

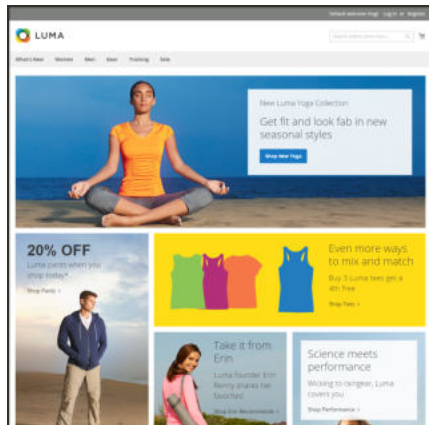
On the Admin sidebar, tap **Content**. The Design options are part of the Content menu.

## Menu Options



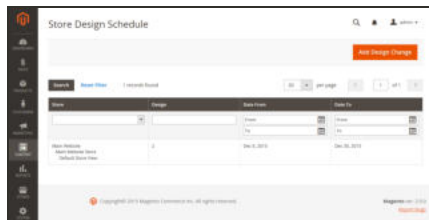
### Configuration

The Design configuration lets you easily maintain different settings for each website, store, and view in your Magento installation.



### Themes

The theme determines the visual presentation of your store, and consists of a collection of layout files, template files, translation files, and skins.

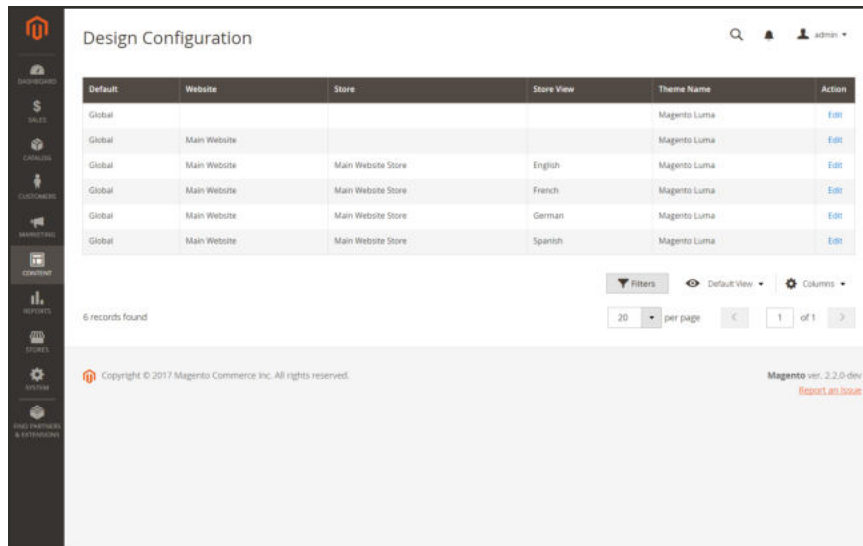


### Schedule

Themes can be activated for a period of time, according to a schedule. Use the schedule to plan theme changes in advance for a season or promotion.

## Design Configuration

The Design Configuration makes it easy to edit design-related rules and configuration settings by displaying the settings on a single page.



Design Configuration

### To edit the design configuration:

1. On the Admin menu, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.  
The page displays the current design settings for the store view.
3. To change the Default Theme, set **Applied Theme** to the theme that you want to apply to the view.  
If no theme is specified, the system default theme is used. Some third-party extensions modify the system default theme.
4. If the theme is to be used for only a specific device, do the following:
  - a. Under **Design Rule** section under **User Agent Rules**, tap **Add New User Agent Rule**.
  - b. In the **Search String** column, enter the browser ID for the specific device.
  - c. A search string can be either a normal expression or Perl Compatible Regular Expression (PCRE). To learn more, see: **User Agent**. The following search string identifies Firefox:

```
/^mozilla/i
```

- d. In the **Theme Name** column, choose the theme that is to be used for the specified device.

*User-Agent Rules*

- e. Repeat the process to enter additional devices. Search strings are matched in the order they are entered.
5. Under **Other Settings**, expand each section. Then, follow the instructions in the linked topics to edit the settings as needed.

*Edit Design Configuration*

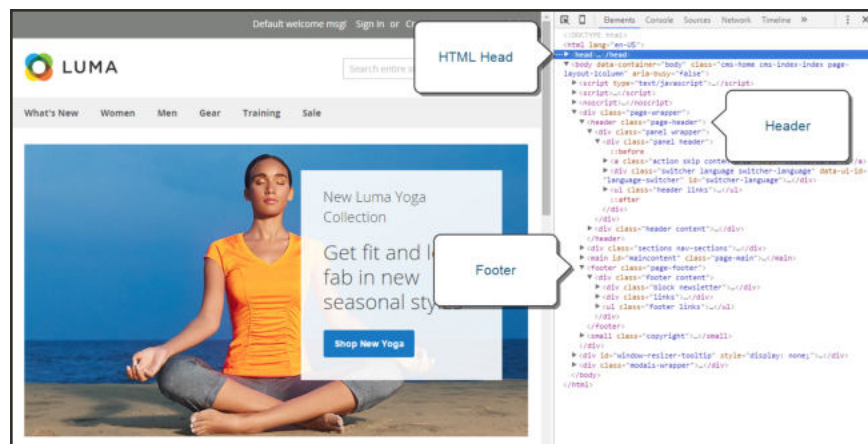
- **Pagination**
  - **HTML Head**
  - **Header**
  - **Footer**
  - **Search Engine Robots**
  - **Product Image Watermarks**
  - **Transactional Emails**
6. When complete, tap **Save Configuration**.



## CHAPTER 45:

# Page Setup

The main sections of the page are controlled, in part, by a set of standard HTML tags. Some of these tags can be used determine the selection of fonts, color, size, background colors, and images that are used in each section of the page. Other settings control page elements such as the logo in the header, and the copyright notice in the footer. The Page Setup sections correspond to the underlying structure of the HTML page, and many of the basic properties can be set from the Admin.




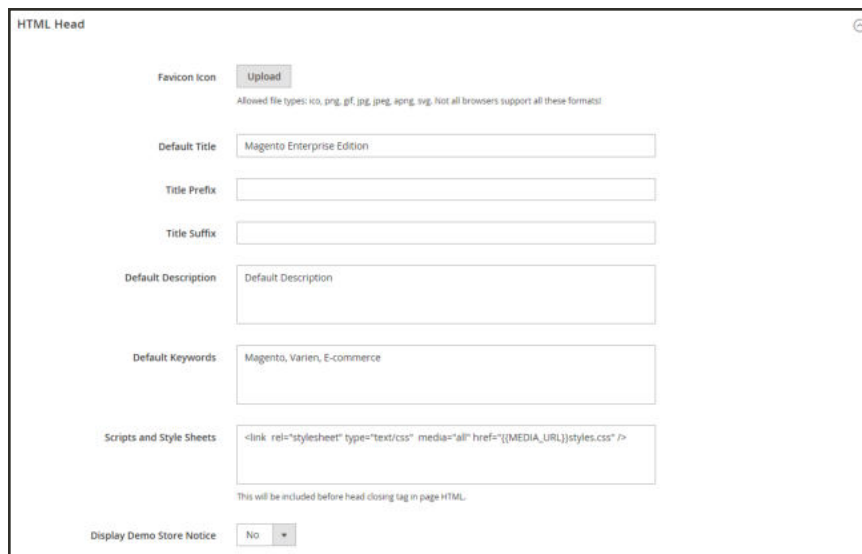
*HTML Page Sections*

## HTML Head

The settings in the HTML Head section correspond to the <head> tag of an HTML page, and can be configured for each store view. In addition to meta data for the page title, description, and keywords, the section includes a link to the favicon, and miscellaneous scripts. Instructions for search engine robots and the display of the store demo notice are also configured in this section.

### To configure the HTML Head:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **HTML Head** section.
4. Update the fields as needed. (See the following Field Descriptions for more information about each item.)
5. When complete, tap **Save Config**.



HTML Head

Favicon Icon   
Allowed file types: ico, png, gif, jpeg, apng, svg. Not all browsers support all these formats!

Default Title

Title Prefix

Title Suffix

Default Description

Default Keywords

Scripts and Style Sheets   
This will be included before head closing tag in page HTML.

Display Demo Store Notice

*HTML Head*

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Favicon Icon	Store View	Uploads the small graphic image that appears in the address bar and tab of the browser. Allowed file types: ICO, PNG, APNG, GIF, and JPG (JPEG). Not all browsers support these formats.

**Field Descriptions (cont.)**

FIELD	SCOPE	DESCRIPTION
Default Page Title	Store View	The title that appears at the title bar of each page when viewed in a browser. The default title is used for all pages, unless another title is specified for individual pages.
Page Title Prefix	Store View	A prefix can be added before the title to create a two- or three-part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.
Page Title Suffix	Store View	A suffix can be added after the title to create a two- or three part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.
Default Meta Description	Store View	The description provides a summary of your site for search engine listings and should not be more than 160 characters in length.
Default Meta Keywords	Store View	A series of keywords that describe your store, each separated by a comma.
Scripts and Style Sheets	Store View	Contains scripts that must be included in the HTML before the closing <head> tag. For example, any third-party JavaScript that must be placed before the <body> tag can be entered here.
Display Demo Store Notice	Store View	Controls the display of the demo store notice at the top of the page. Options include: Yes / No

## Header


The Header section identifies the path to your store logo, and specifies the logo alt text and welcome message.

The screenshot shows a configuration window titled "Header". It contains the following fields and controls:

- Logo Image:** A text input field with an "Upload" button next to it. Below the button, it says "Allowed file types: png, gif, jpg".
- Logo Attribute Width:** A text input field.
- Logo Attribute Height:** A text input field.
- Welcome Text:** A text input field containing the text "Default welcome msg!".
- Logo Image Alt:** A text input field.

*Header*

### To configure the header:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Header** section.
4. Make any changes necessary to the **logo** and **welcome message** settings.
5. When complete, tap **Save Config**.

### Field Descriptions


FIELD	SCOPE	DESCRIPTION
Logo Image	Store View	Identifies the path to the logo that appears in the header. Supported file types: PNG, GIF, JPG (JPEG)
Logo Attribute Width	Store View	The width of your logo image in pixels.
Logo Attribute Height	Store View	The height of your logo image in pixels.
Welcome Text	Store View	The welcome message appears in the header of the page and includes the name of customers who are logged in.
Logo Image Alt	Store View	The Alt text that is associated with the logo.

## Footer

The Footer configuration section is where you can update the **copyright notice** that appears at the bottom of the page, and enter miscellaneous scripts that must be positioned before the closing `<body>` tag.

*Footer*

### To configure the footer:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand  the **Footer** section.
4. Make any changes necessary to the **Copyright** and **Miscellaneous HTML** settings.
5. When complete, tap **Save Config**.

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Copyright	Store View	The copyright statement that appears at the bottom of each page. To include the copyright symbol, use the HTML character entity <code>&amp;copy;</code> as follows: <code>&amp;copy; 2014 Magento Demo Store. All Rights Reserved.</code> Make sure to replace the sample copyright notice with your own.
Miscellaneous HTML	Store View	An input box where you can upload miscellaneous scripts to the server that must be placed just before the closing <code>&lt;body&gt;</code> tag.

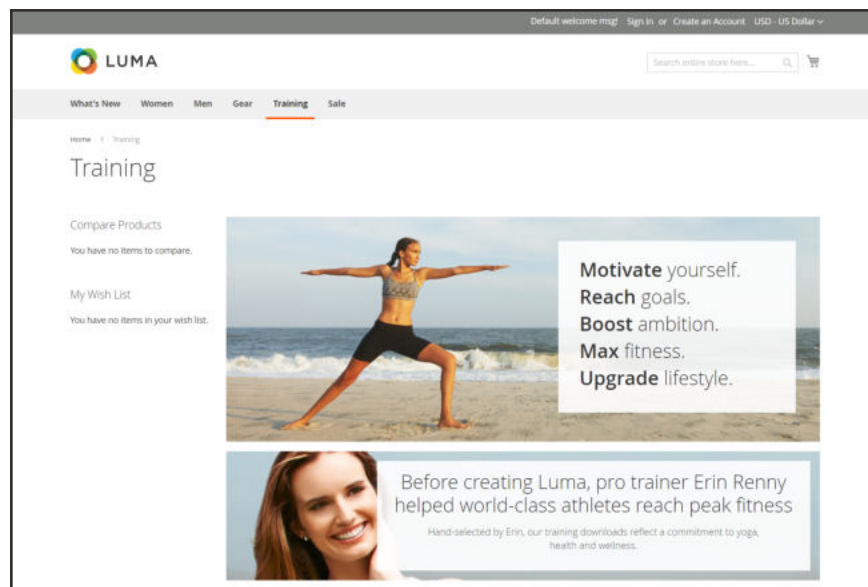


## CHAPTER 46:

# Page Layout

The layout of each page in your store consists of distinct sections, or containers, that define the header, footer, and content areas of the page. Depending on the layout, each page might have one, two, three columns, or more. You can think of the layout as the “floor plan” of the page, and assign a specific layout to be used as the default for CMS, product, and category pages.

On the page, content blocks float to fill the available space, according to the section of the [page layout](#) where they are assigned to appear. You will discover that if you change the layout from a three-column to a two-column layout, the content of the main area expands to fill the available space, and any blocks that are associated with the unused side bar seem to disappear. However, if you restore the three-column layout, the blocks reappear. This fluid approach, or liquid layout, makes it possible to change the page layout without having to rework the content. If you are used to working with individual HTML pages, you will discover that this modular, “building block” approach requires a different way of thinking.



*Two Column Page Layout*

**To configure default layouts:**

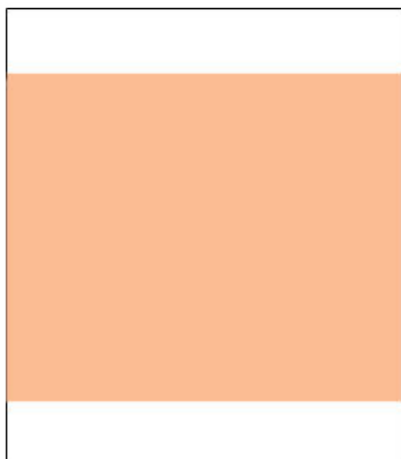
1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand the **Default Layouts** section, and do the following:

*Default Layouts*

- a. Choose the **Default Product Layout** that you want to use for product pages.
  - b. Choose the **Default Category Layout** that you want to use for category pages.
  - c. Choose the **Default Page Layout** that you want to use for CMS pages.
4. When complete, tap **Save Config**.



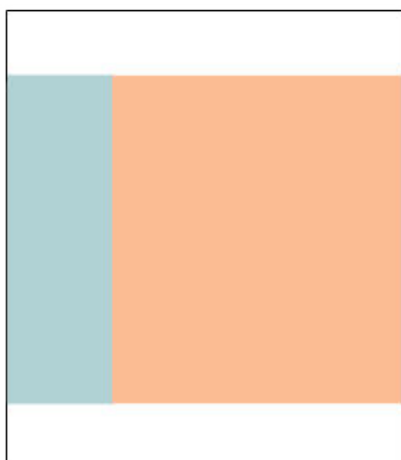
## Standard Page Layouts



### 1 Column

---

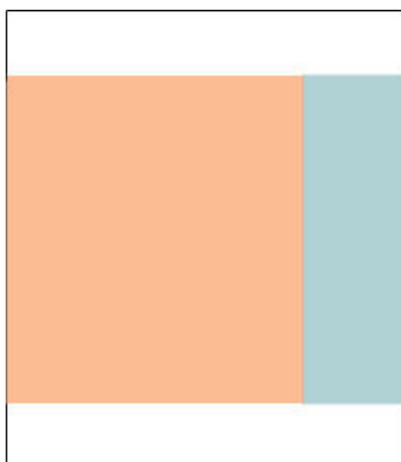
The “1 Column” layout can be used to create a dramatic home page with a large image or focal point. It’s also a good choice for a landing page, or any other page that has a combination of text, images, and video.



### 2 Columns with Left Bar

---

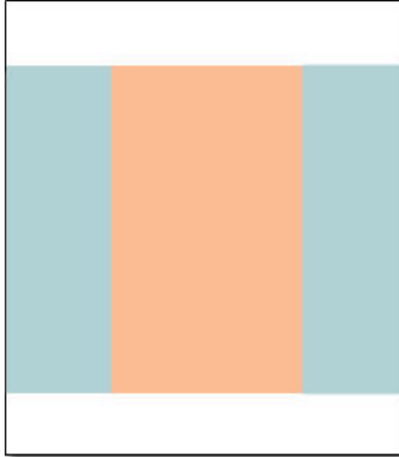
The “2 Columns with Left Bar” layout is often used for pages with navigation on the left, such as a catalog or search results pages with layered navigation. It is also an excellent choice for home pages that need additional navigation or blocks of supporting content on the left.



### 2 Columns with Right Bar

---

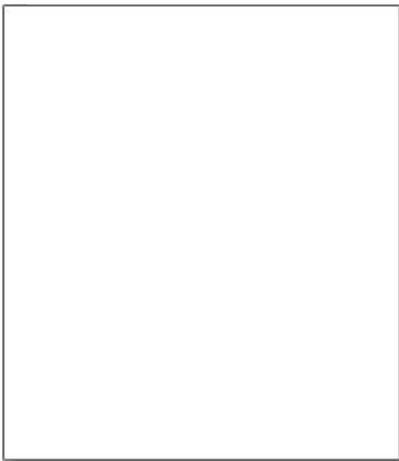
With a “2 Columns with Right Bar” layout, the main content area is large enough for an eye-catching image or banner. This layout is also often used for Product pages with blocks of supporting content on the right.



### 3 Columns

---

The “3 Column” layout has a center column that is wide enough for the main text of the page, with room on each side for additional navigation and blocks of supporting content.



### Empty

---

The “Empty” layout can be used to define custom page layouts. To learn more, see the [Magento Designer’s Guide](#).

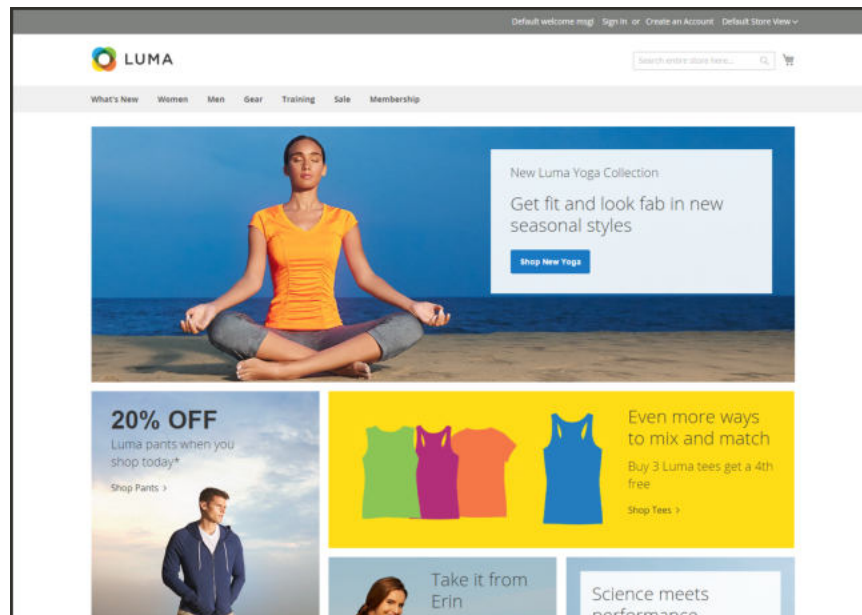
## Storefront Examples

The column dimensions are determined by style sheet of the theme. Some themes apply a fixed pixel width to the page layout, while others use percentages to make the page respond to the width of the window or device.

Most desktop themes have a fixed width for the main column, and all activity takes place within this enclosed area. Depending on your screen resolution, there is empty space on each side of the main column.

### 1 Column Layout

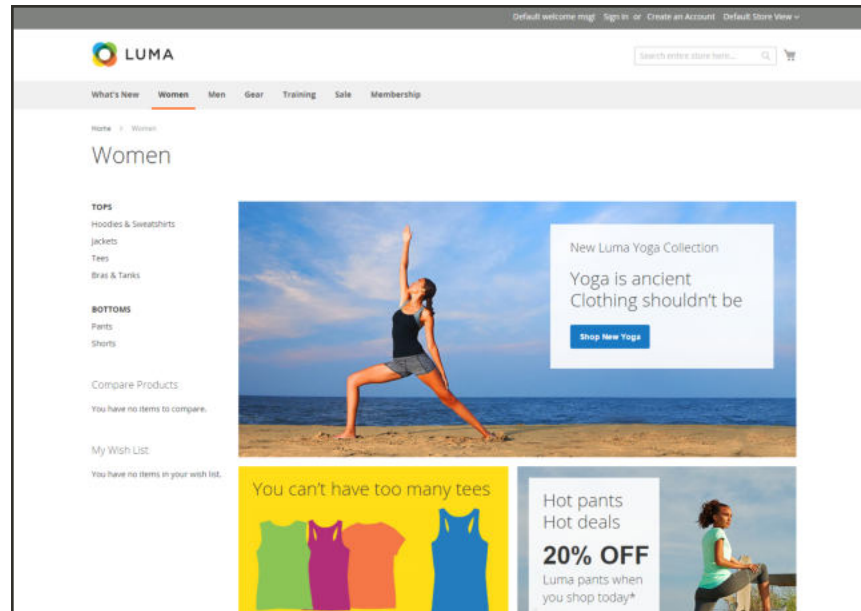
The content area of a “1 Column” layout spans the full-width of the main column. This layout is often used for a home page with a large banner or slider, or pages that require no navigation, such as a login page, splash page, video, or full-page advertisement.



*1 Column Layout*

## 2 Columns with Left Bar

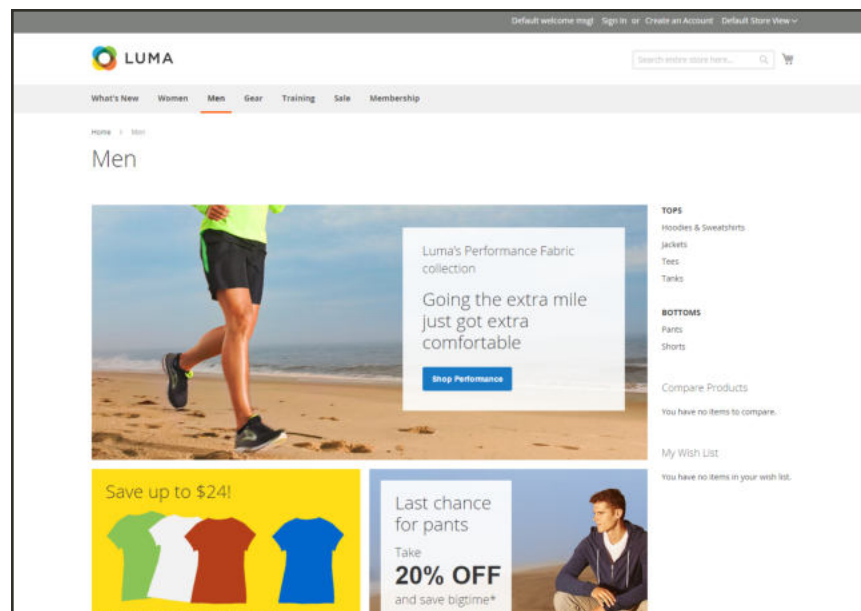
The content area of this layout is divided into two columns. The main content column floats to the right, and the side bar floats to the left.



*2 Columns Left Bar*

## 2 Columns with Right Bar

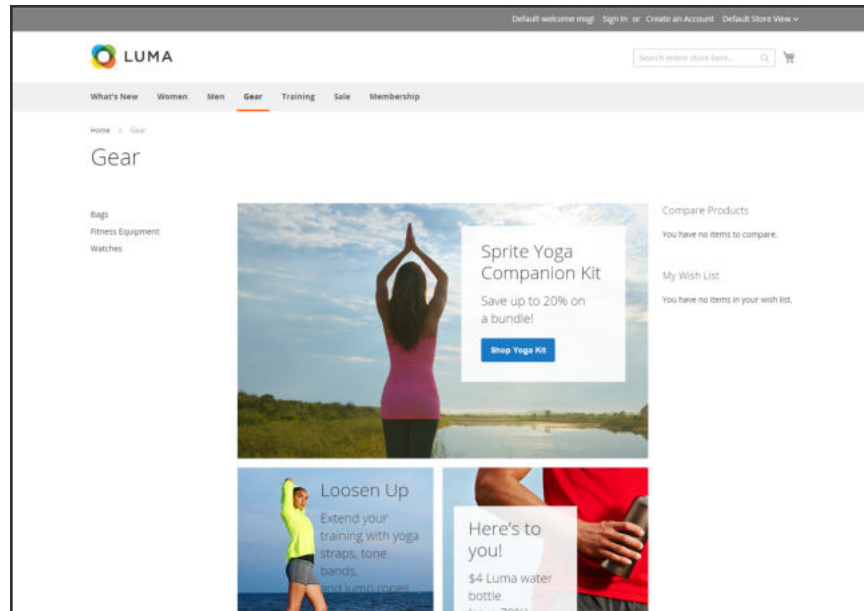
This layout is a mirror image of the other two-column layout. This time, the side bar floats to the right, and the main content column floats to the left.



*2 Columns Right Bar*

### 3 Columns

A 3-column layout has a main content area with two side columns. The left side bar and main content column are wrapped together, and float as a unit to the left. The other side bar floats to the right.



*3 Columns*

## Layout Updates

Before you begin working with custom layout updates, it is important to understand how the pages of your store are constructed, and the difference between the terms layout and layout update. The term **layout**<sup>1</sup> refers to the visual and structural composition of the page. However, the term **layout update**<sup>2</sup> refers to a specific set of XML instructions that determines how the page is constructed.

The XML layout of your Magento Open Source store is a hierarchical structure of blocks. Some elements appear on every page, and others appear only on specific pages. You can see how these structural blocks are referenced by examining the layout update code for your home page. To do so, simply open your home page in edit mode, and choose the Design tab to view the Page Layout section. Depending on the theme, it might contain instructions to remove blocks, unset blocks, and add blocks by referencing specific areas of the page layout.

In many cases, the same result can be achieved with the **Widget** tool. To place a block of content as a widget, you must identify the page, and the location on the page where you want the block to appear. You can use the Widget tool to place a block on most any page in your store, including the home page and all content pages. However, to place a block in the sidebar of a specific page, you must make the change by entering code as a layout update.

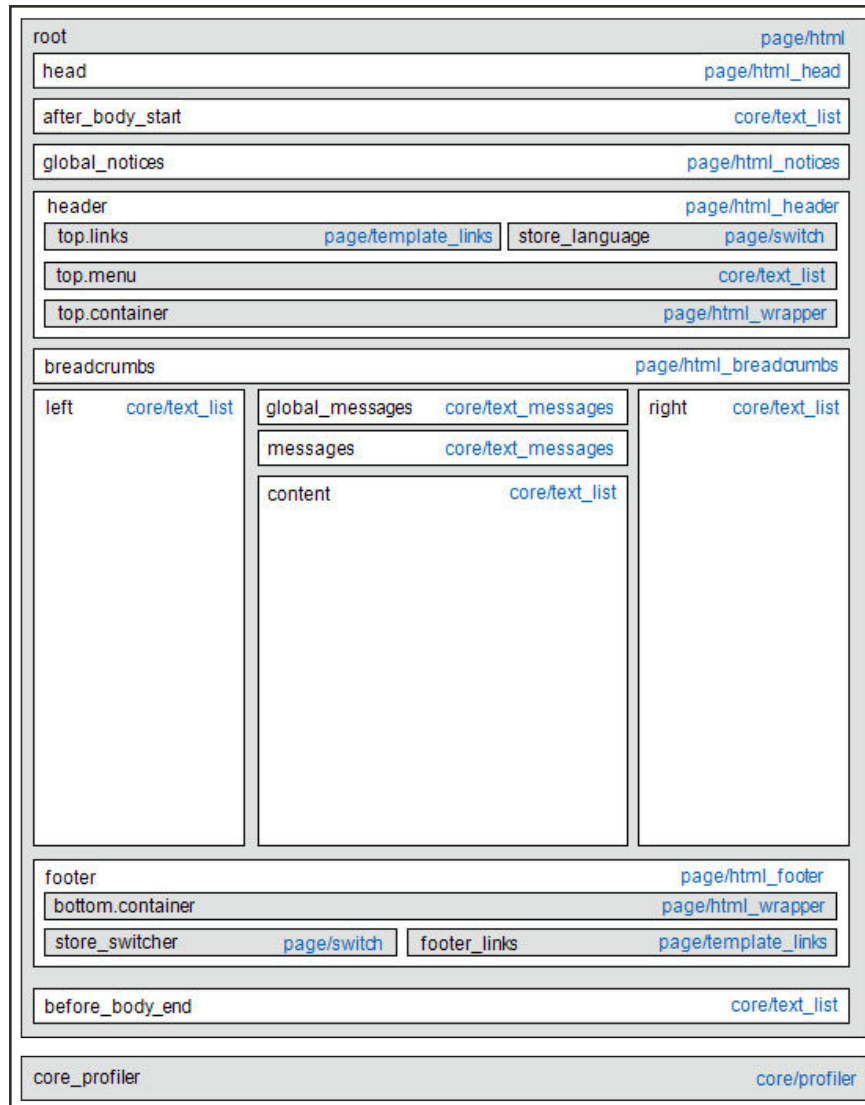
---

<sup>1</sup>The visual and structural composition of a page.

<sup>2</sup>A specific set of XML instructions that determines how the page is constructed.

## Standard Block Layout

In the following diagram, the block names that can be used to refer to a block in the layout are black, and the block types, or block class paths, are blue.



*Standard Block Layout*

## Block Descriptions

BLOCK TYPE	DESCRIPTION
page/html	There can be only one block of this type per page. The block name is "root," and, it is one of the few root blocks in the layout. You can also create your own block and name it "root," which is the standard name for blocks of this type.
page/html_head	There can be only one block of this type per page. The block name is "head," and it is a child of the root block. This block must not be removed from layout.
page/html_notices	There can be only one block of this type per page. The block name is "global_notices," and it is a child of the root block. If this block is removed from the layout, the global notices will not appear on the page.
page/html_header	There can be only one block of that type per page. The block name is "header," and it is a child of the root block. This block corresponds to the visual header at the top of the page, and contains several standard blocks. This block must not be removed.
page/html_wrapper	Although included in the default layout, this block is deprecated, and only is included to ensure backward compatibility. Do not use blocks of this type.
page/html_breadcrumbs	There can be only one block of this type per page. The name of this block is "breadcrumbs," and it is a child of the header block. This block displays breadcrumbs for the current page.
page/html_footer	There can be only one block of this type per page. The block name is "footer," and it is a child of the root block. The footer block corresponds to the visual footer at the bottom of the page, and contains several standard blocks. This block must not be removed.
page/template_links	There are two blocks of this type in the standard layout. The "top.links" block is a child of the header block, and corresponds to the top navigation menu. The "footer_links" block is a child of the footer block, and corresponds to the bottom navigation menu. It is possible to manipulate the template links, as shown in the examples.
page/switch	There are two blocks of this type in a standard layout. The "store_language" block is a child of the header block, and corresponds to the top language switcher. The "store_switcher" block is a child of the footer block, and corresponds to the bottom store switcher.
core/messages	There are two blocks of this type in a standard layout. The "global_messages" block displays global messages. The "messages" block is used to display all other messages. If you remove these blocks, the customer won't be able to see any messages.



**Block Descriptions (cont.)**

BLOCK TYPE	DESCRIPTION
core/text_list	This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.
core/profiler	There is only one instance of this type of block per page. It is used for the internal Magento profiler, and should not be used for any other purpose.

## Layout Update Examples

The following blocks types can be manipulated with custom layout instructions. Each action must be specified using the full syntax of the instruction. In the following examples, a simplified notation is used to refer to each action, which corresponds to the full syntax of the instruction.

### Full Syntax

```
?  
<!-- Action can be specified inside either a <block>  
or <reference> instruction. -->  
  
    <action method="someActionName">  
        <arg1>Value 1</arg1>  
        <arg2>Value 2</arg2>  
        <!-- -->  
        <argN>Value N</argN>  
    </action>  
<!-- -->
```

### Simplified Syntax

```
?  
someActionName($arg1, $arg2, ..., $argN)
```

## page/template\_links

### Syntax

ACTION	DESCRIPTION
addLink(\$label, \$url, \$title, \$prepare)	Adds another link to the end of the list of existing links. Just specify the \$label (link caption), \$url (link URL) and \$title (link tooltip), and you'll see a new link in the corresponding place. The \$prepare parameter must be "true" if you want the URL to be prepared, or converted to the full URL from the shortened URL. For example, the new page becomes BASE_URL/newpage if prepared.
removeLinkByUrl(\$url)	Removes a link from the block by its URL. Note that the URL must be properly specified and exactly match corresponding URL of the link you want to remove.

## cms/block

### Syntax

ACTION	DESCRIPTION
setBlockId(\$blockId)	Specifies the ID of a CMS block, so its content can be fetched and displayed when the page is rendered.

```

?
<!--...-->

<reference name="content">
    <block type="cms/block" name="additional.info" as="additionalInfo">
        <action method="setBlockId"><id>additional_info</id></action>
    </block>
</reference>
<!-- -->

```

**core/text**

A core/text block can be used to enter free form text directly into the template.

**Syntax**

ACTION	DESCRIPTION
addText(\$textContent)	<p>Specifies text to be rendered as the block's content. After the text is specified, the layout update instructions must continue to be a valid XML statement. If you use HTML tags as part of the text, it is recommended to use:</p> <pre data-bbox="716 583 927 613">&lt;![CDATA[...]]&gt;</pre>

```

?
<!--...-->

<reference name="content">
  <block type="core/text" name="test.block">
    <action method="addText">
      <txt><![CDATA[<h2>ATTENTION!</h2><p>Check your options
carefully before you submit.</p>]]></txt>
    </action>
  </block>
</reference>
<!-- -->
```

**page/html\_welcome**

This block can be used to duplicate the “Welcome, <USERNAME>!” message that appears in the header block. When the user is not logged in, the welcome message specified in the configuration appears.

## Layout Update Syntax

Custom layout updates can be applied to product category pages, product pages, and content page to achieve a variety of results, such as:

<code>&lt;block&gt;</code>	Create new block.
<code>&lt;reference&gt;</code>	Update existing content.
<code>&lt;action&gt;</code>	Assign actions to blocks.
<code>&lt;remove&gt;</code>	Remove blocks.

Any change made to the layout is applied when the associated entity—which can be either a product, category, or CMS page—becomes active in the frontend of the store.

Custom layout update instructions consist of well-formed XML tags, without the `<?xml ...>` declaration and root tag. As with normal XML, every tag must either be empty or properly closed, as shown in the following examples:

```
<tag attribute="value" />
<tag attribute="value"> ... </tag>
```

**<block>**

Creates a new block within the current context. Layout block nesting defines the ordering of block initialization location of the blocks on the page.

**Syntax**

NAME	VALUE
type	<p><b>*</b> block class path</p> <p>An identifier of the block class path that corresponds to the class of the block. See the list of the available block types below.</p>
name	<p><b>*</b> block name identifier</p> <p>A name that can be used to address the block in which this attribute is assigned. If you create a new block with the name that is the same as one of the existing blocks, your newly created block substitutes the previously existing block. See the list of names of existing blocks below.</p>
before	<p>block name   '-'</p> <p>Is used to position the block before a block with the name specified in the value. If "-" value used the block is positioned before all other sibling blocks.</p>
after	<p>block name   '-'</p> <p>Is used to position the block after a block with the name specified in the value. If "-" value used the block is positioned after all other sibling blocks.</p>
template	<p>template filename</p> <p>A template filename used for the specific block type. As you have no way to see the list of template files, use whatever template value is demanded for every block type listed below.</p>
as	<p>block alias</p> <p>An alias name by which a template calls the block in which this attribute is assigned. Sometimes it's necessary to specify the alias for a specific block type.</p>

**<reference>**

Changes the context for all included instructions to a previously defined block. An empty <reference> tag is of no use, because it affects only the instructions which are children.

**Syntax**

NAME	VALUE
name	* block name A name of a block to reference.

**<action>**

Used to access block API, in other words, call block's public methods. It is used to set up the execution of a certain method of the block during the block generation. Action child tags are translated into block method arguments. The list of all available methods depends on the block implementation (e.g. public method of the block class).

**Syntax**

NAME	VALUE
method	* block method name A name of the public method of the block class this instruction is located in that is called during the block generation.

**<remove>**

Removes an existing block from the layout.

**Syntax**

NAME	VALUE
name	* block name The name of the block to be removed.

**<extend>**

This instruction performs final modifications to blocks which are already part of the layout. Every attribute in the <block> instruction—except for the block name—is subject for change. In addition, the special attribute parent can be used to change the parent of the block. Simply put the name of the new parent block into the <extend> instruction, and the parent of the block that is referenced will be changed in the layout.

**Syntax**

NAME	VALUE
name	* block name The name of any block to be extended.
*	any other Any other attribute specific for the <block> instruction.
parent	block name The name of the block that should become a new parent for the referenced block.
	* Indicates a required value



## Controlling Block Order

Sometimes more than one content element is assigned to the same structural block. For example, there might be several block that appear in a sidebar. You can control the order of blocks by including a “before” or “after” positioning property in the code. To place a block either before, or after a specific block, replace the hyphen with the block identifier, as shown in the following examples:

`before="-"`      Places the block at the top of the sidebar, before other blocks.

`after="-"`      Places the block at the bottom of the sidebar, after other blocks.

### Code to Position Content Blocks

```
<block type="cms/block" before="-" name="left.permanent.callout">
<block type="cms/block" before="some-other-block"
name="left.permanent.callout">
<block type="cms/block" after="-" name="left.permanent.callout">
<block type="cms/block" after="some-other-block"
name="left.permanent.callout">
```

## XML Load Sequence

For developers, it is important to understand that blocks and layout updates must be loaded in the correct order, in keeping with the rules of precedence and **load sequence**<sup>1</sup> which determine how the page is rendered. Magento supports the following page layout scenarios:

### Scenario 1: Default Layout

The default layout consists of the visual elements that are visible from every page of the store. Whether it is a menu item, or a shopping cart block, each item has a **handle**<sup>2</sup> in the default section of the layout definition.

### Scenario 2: Changes to Specific Pages

The second case allows you to create a different layout for a specific page. The XML layout for specific pages is constructed in the same sequence that Magento loads modules, and is determined by the system configuration.

In addition to the instructions in the layout update files which are specific to each module, you can make a custom layout update that applies to a special case in the backend, and is merged each time the special case occurs.

---

<sup>1</sup>The order in which scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

<sup>2</sup>In programming, a name used to reference an object.

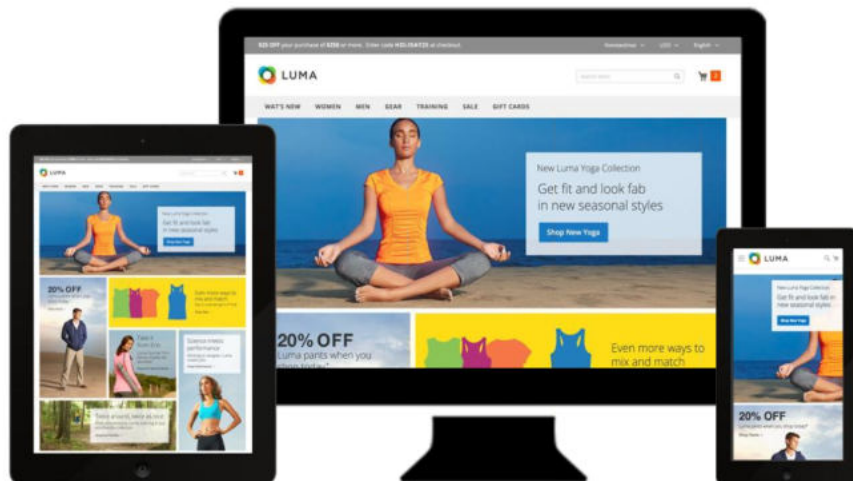
## CHAPTER 47:

# Themes

A theme is a collection of files that determines the visual presentation of your store. When you first install Magento Open Source, the design elements of the store are based on the “Default” Theme. In addition to the initial default theme that comes with your Magento installation, there is a wide variety of themes that are available “off the shelf” on Magento Connect.

A responsive theme adjusts the page layout to fit the view port of the device. Magento’s sample “Luma” theme has a flexible, responsive layout that can be viewed from the desktop, tablet, or mobile device.

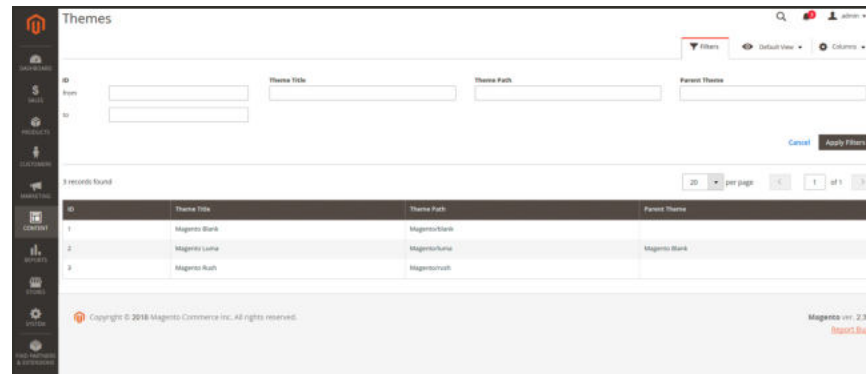
Magento themes include layout files, template files, translation files, and skins. A skin is a collection of supporting CSS, images, and JavaScript files that together, create the visual presentation and interactions that your customers experience when they visit your store. Themes and skins can be modified and customized by a developer or designer who has knowledge of Magento theme design and access to your server. To learn more, see the [Frontend Developer Guide](#).



*Luma Theme*

## Using the Default Theme

Magento's default responsive theme renders the display of your storefront for different devices, and incorporates best practices for desktop, table, and mobile devices. Some themes are designed to be used only with specific devices. When Magento detects a specific browser ID, or user agent, it uses the theme that is configured to be used for the specific browser. The search string can also include Perl-Compatible Regular Expressions (PCRE). To learn more, see [User Agent](#).



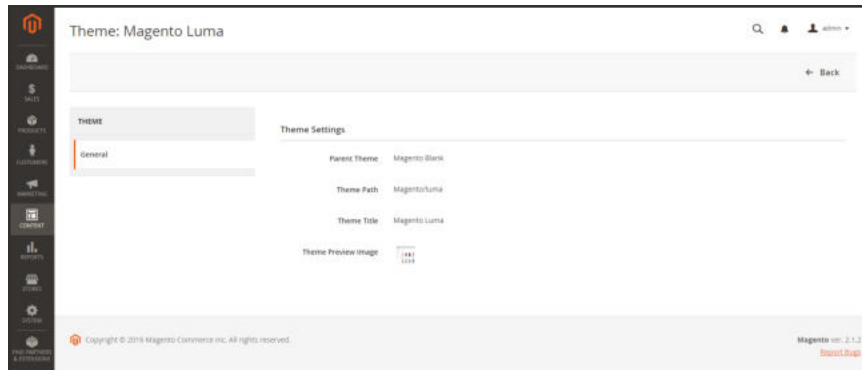
*Themes*

### To filter the theme grid:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Themes**.
2. Tap **Filters**.
3. To filter, enter an ID range, theme name (or title), folder path, or parent theme.
4. Tap **Apply Filters** to update the list of themes.

### To view the current theme settings:

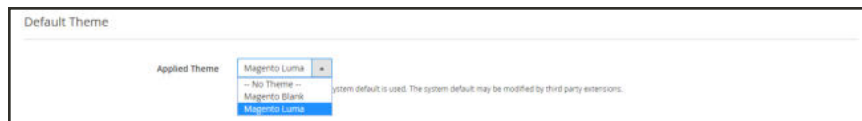
1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Themes**.
2. In the list of installed themes, find the theme that you want to examine, and click the row to display the settings.
3. To view a sample page, tap the **Theme Preview Image**.



*Preview Theme*

**To apply a theme:**

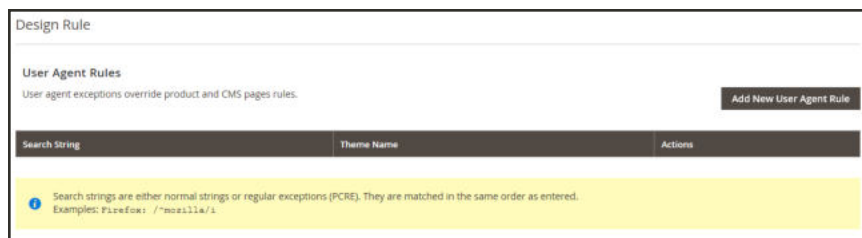
1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Default Theme**, set **Applied Theme** to the one that you want to use for the current view.



*Applied Theme*

**To add a user agent rule:**

1. Under **Design Rule**, tap **Add New User Agent Rule**. Then, do the following:

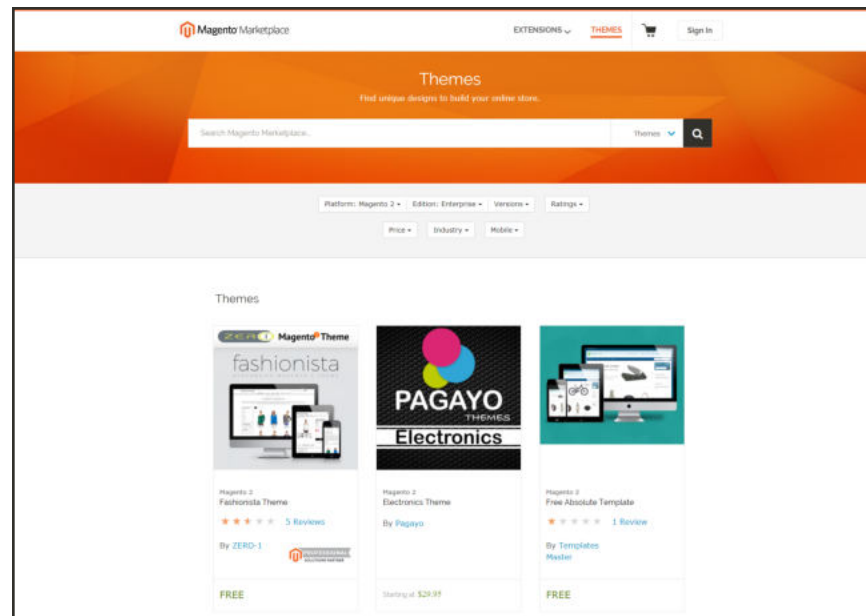


*Design Rule*

- a. In the **Search String** field, enter the browser ID for the specific device. For example:  
 Search strings are matched in the order they are entered. For example, for Firefox enter:  
`/^mozilla/i`
  - b. Repeat the process to enter additional devices.
2. When complete, tap **Save Config**.

## Installing a New Theme

When you first install Magento, the design elements of the store are based on the “Default” theme. The Luma theme is also available if you installed the sample data. You can modify a theme, add themes created by others, or create new ones. [Magento Marketplace](#) contains a growing selection of themes that you can install to change the appearance of your store. To learn how to create or modify a theme, see the [Frontend Developer Guide](#).



*Magento Marketplace*

### To install a new theme:

1. Before you begin, make sure that you have a valid set of [Magento 2 Access Keys](#).
2. Follow the steps outlined in the [Marketplace Quick Tour](#), to:
  - Find a Theme
  - Evaluate the Product
  - Make a Purchase
  - Download the Software
  - Install the Theme
3. To apply the theme to your store, see: [Using the Default Theme](#),

## Theme Assets

The term **static files**<sup>1</sup> refers to the collection of assets, such as CSS, fonts, images, and JavaScript, that is used by a theme. The location of static files is specified in the **Base URL** configuration.

A digital signature can be added to the URL of each static file to make it possible for browsers to detect when a newer version is available. The newer version of the file is used if the signature differs from what is stored in the browser's cache.

For a standard installation, the assets associated with a theme are organized in the `web` folder at the following location below the Magento root.

```
[magento_root]/app/design/frontend/Magento/[theme_name]/web
```




*Theme Assets*

---

<sup>1</sup>The collection of assets, such as CSS, fonts, images, and JavaScript that is used by a theme.

### To sign static files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand  the **Static Files Settings** section.



*Static Files Settings*

4. Set **Sign Static Files** to "Yes."
5. When complete, tap **Save Config**.

FILE TYPE	DESCRIPTION
CSS	Directory that contains the CSS files that control the visual styling that is associated with the skin. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/css
Fonts	Directory that contains the fonts that are available to be used by the theme. Location on server: [magento]/app/design/frontend/Magento/[theme]/web/fonts
Images	Directory that contains all images used by the theme, including buttons, background textures, and so on. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/images
JS	Directory that contains theme-specific JavaScript routines and callable functions. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/js



## Merging CSS Files

As part of an effort to optimize your site and reduce page load time, you can reduce the number of separate CSS files by merging them into a single condensed file. If you open a merged CSS file, you'll find one continuous stream of text, with line breaks removed. Because you can't edit the merged file, it's best to wait until you are out of the development mode, and no longer making frequent changes to the CSS.

CSS files can be merged only when working in **Developer Mode**.

### To merge CSS files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☺ the **CSS Settings** section.



*CSS Settings*

4. Set **Merge CSS Files** to “Yes.”
5. When complete, tap **Save Config**.

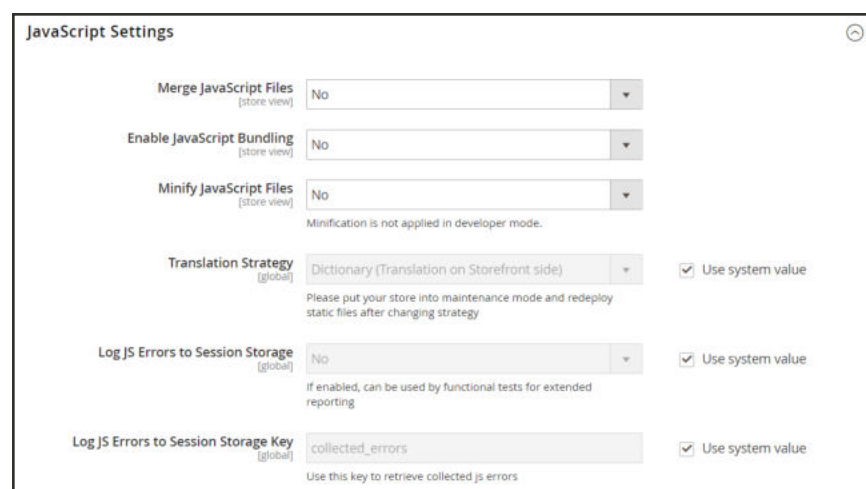
## Merging JavaScript Files

Multiple JavaScript files can be merged into a single, condensed file to reduce page load time. If you open a merged JavaScript file, you'll find one continuous stream of text, with line breaks removed. If you are finished with the development process, and the code contains no errors, you might consider merging the files.

JavaScript files can be merged only when working in **Developer Mode**.

### To merge JavaScript files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☺ the **JavaScript Settings** section.



The screenshot shows the 'JavaScript Settings' configuration panel. It contains the following settings:

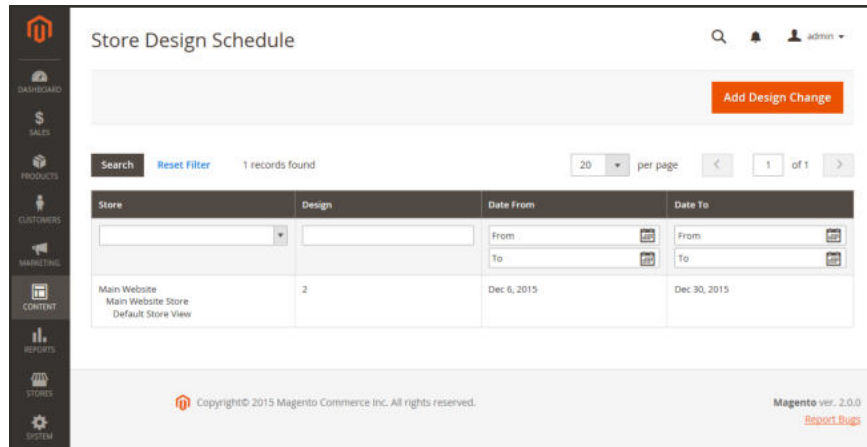
- Merge JavaScript Files** (store view): No
- Enable JavaScript Bundling** (store view): No
- Minify JavaScript Files** (store view): No  
Minification is not applied in developer mode.
- Translation Strategy** (global): Dictionary (Translation on Storefront side)  Use system value  
Please put your store into maintenance mode and redeploy static files after changing strategy
- Log JS Errors to Session Storage** (global): No  Use system value  
If enabled, can be used by functional tests for extended reporting
- Log JS Errors to Session Storage Key** (global): collected\_errors  Use system value  
Use this key to retrieve collected js errors

### *JavaScript Settings*

4. Set **Merge JavaScript Files** to “Yes.”
5. When complete, tap **Save Config**.

## Scheduling Design Changes

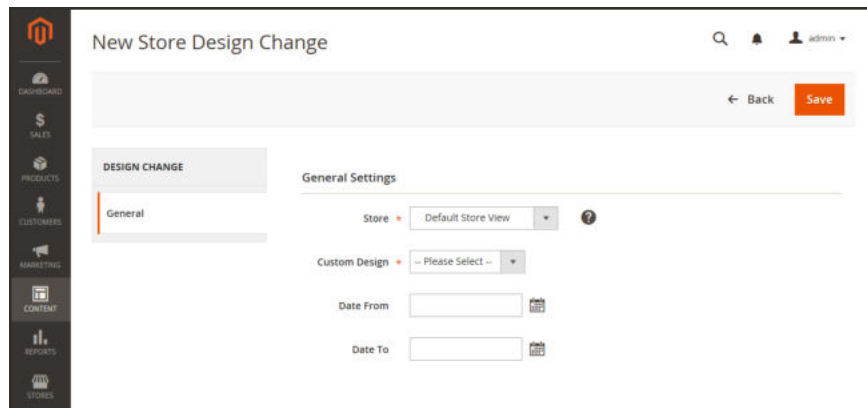
Design changes can be scheduled in advance, so they go into effect on schedule. You can use scheduled design changes for seasonal changes, promotions, or just to add variation.



*Store Design Schedule*

### To schedule a design change:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Schedule**.
2. Tap **Add Design Change**. Then under General Settings, do the following:



*New Design Change*

- a. Set **Store** to the view where the change applies.
  - b. Set **Custom Design** to the theme, or variation of a theme, that is to be used.
  - c. To define the period when the change is in effect, use the calendar (📅) to choose the values for the **Date From** and **Date To** fields.
3. When complete, tap **Save**.

# CUSTOMERS

## Contents

In this section of the guide, you will become familiar with the customer account dashboard, and learn to configure customer accounts according to your preference. You will also learn how to create customer groups that can be referenced in promotions and tax classes.

### Customers Menu

- All Customers

- Now Online

### Customer Accounts

- Customer Sign In

- Account Dashboard

- Configuring Customer Accounts

  - Online Session Length

  - Login Landing Page

  - New Account Options

  - Name and Address Options

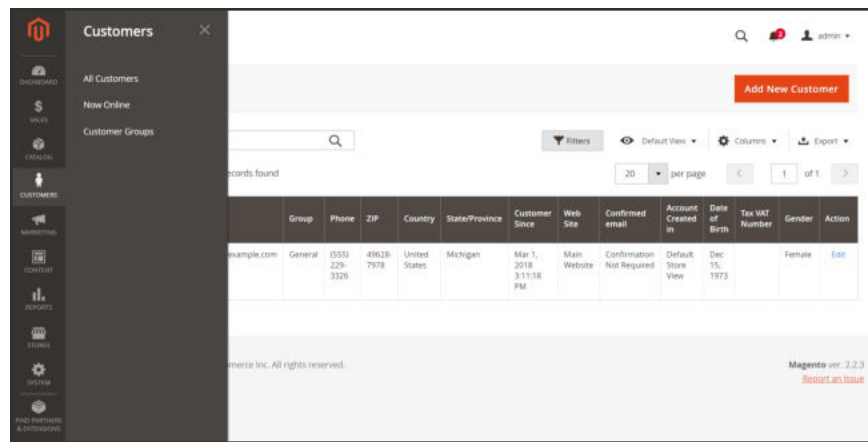
  - Password Options

### Customer Groups

## CHAPTER 48:

# Customers Menu

The Customers menu provides access to customer account management tools, and gives you the ability to see who is currently online in your store.



*Customers Menu*

### To display the Customers menu:

On the Admin sidebar, tap **Customers**.

## Menu Options



### All Customers

---

Lists all customers who have registered for an account with your store, or were added by the administrator.



### Now Online

---

Lists all customers and visitors who are currently online in your store.

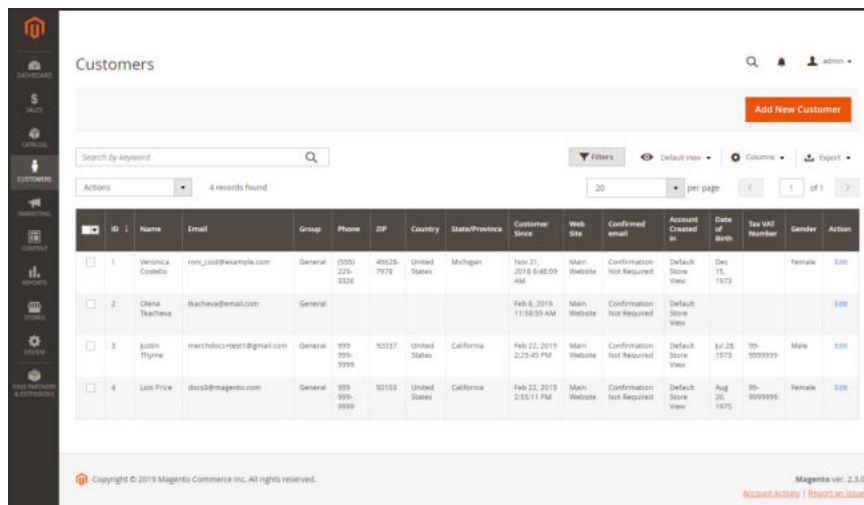
### Customer Groups

---

The customer group determines which discounts are available to shoppers, and the tax class applies to the purchase.

## All Customers

The Customers grid lists all customers who have registered for an account with your store, or were added by the administrator. Use the standard **grid controls** to filter the list, and adjust the **column layout**. To learn more, see: [Managing Customer Accounts](#).



All Customers

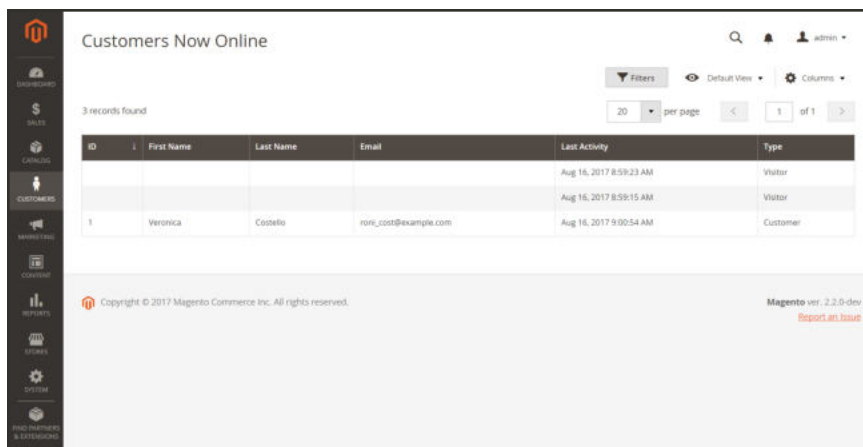
### To view customer information:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer record. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose the information you need to edit. Then, make the necessary changes. To learn more, see: [Updating Customer Accounts](#).
4. When complete, tap **Save Customer**.



## Now Online

The Now Online option on the Customers menu lists all customers and visitors who are currently online in your store. The interval of time that customers are shown as currently online is set in the configuration, and determines how long the customer’s activity is visible from the Admin. By default, the interval is fifteen minutes.



*Online Customers*

### To see all customers who are online now:

1. On the Admin sidebar, tap **Customers**.
2. Choose **Online Now**.

To help an online customer complete a purchase, see: [Shopping Assistance](#).

### To configure the time interval:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Online Customers Options** section. Then, do the following:



*Online Customers Options*

- a. In the **Online Minutes Interval** field, enter the number of minutes for the customer session to be visible from the Admin. Leave the field empty to accept the default interval of fifteen minutes.
  - b. In the **Customer Data Lifetime** field, enter the number of minutes before any unsaved data entered by the customer expires.
4. When complete, tap **Save Config**.

### Column Descriptions

COLUMN	DESCRIPTION
ID	The customer ID of a registered customer.
First Name	The first name of a registered customer.
Last Name	The last name of a registered customer.
Email	The email address of a registered customer.
IP Address	The IP address of the computer that customers and guests are using to access your store.
Session Start Time	The date and time that marks the beginning of the current customer session.
Last Activity	The date and time of the customer's last activity in your store.
Type	Options include: Customer / Visitor
Last URL	The last URL the customer visited.



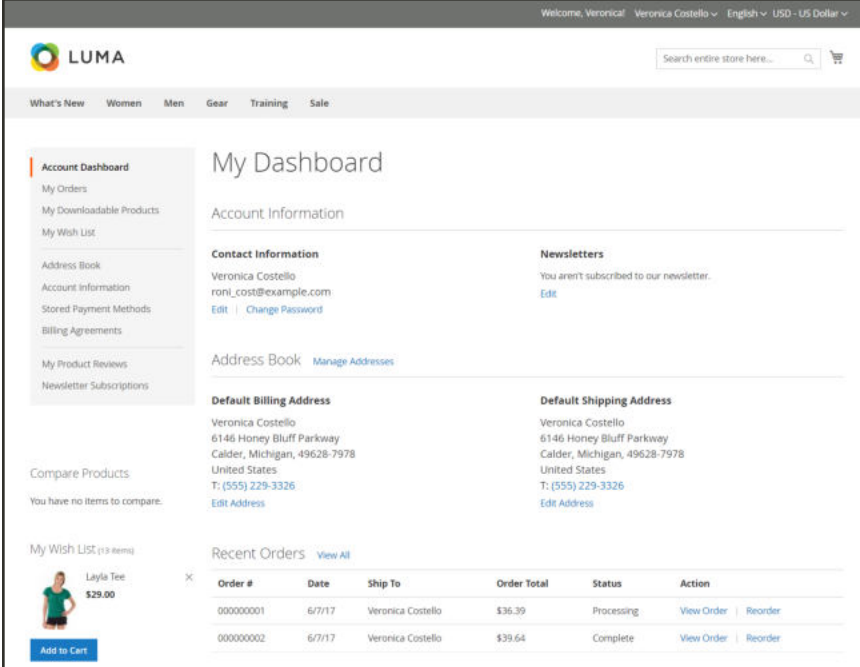
## CHAPTER 49:

# Customer Accounts

The header of every page in your store extends an invitation for shoppers to “Log in or register” for an account with your store. Customers who open an account enjoy a range of benefits, including:

- Faster checkout.** Registered customers move through checkout faster because much of the information is already in their accounts.
- Self service.** Registered customers can update their information, check the status of orders, and even reorder from their account dashboard.

Customers can access their account dashboard by clicking the “My Account” link in the header of the store. They can use their account dashboard to view and modify their information, including past and current addresses, billing and shipping preferences, newsletter subscriptions, wish list, and more.



The screenshot shows the 'My Dashboard' page for a user named Veronica Costello. The page is divided into several sections:

- Account Dashboard:** A sidebar menu with links to My Orders, My Downloadable Products, My Wish List, Address Book, Account Information, Stored Payment Methods, Billing Agreements, My Product Reviews, and Newsletter Subscriptions.
- Account Information:** Displays the user's name (Veronica Costello) and email (roni\_cost@example.com) with links to Edit and Change Password.
- Newsletters:** A notification that the user is not subscribed to the newsletter, with an Edit link.
- Address Book:** A link to Manage Addresses.
- Default Billing Address:** Shows the user's address (6146 Honey Bluff Parkway, Calder, Michigan, 49628-7978, United States) and phone number ((555) 229-3326) with an Edit Address link.
- Default Shipping Address:** Shows the same address and phone number with an Edit Address link.
- Recent Orders:** A table with columns for Order #, Date, Ship To, Order Total, Status, and Action. It lists two orders from 6/7/17.
- My Wish List:** Shows a single item, 'Layla Tee', priced at \$29.00, with an Add to Cart button.

Order #	Date	Ship To	Order Total	Status	Action
00000001	6/7/17	Veronica Costello	\$36.39	Processing	<a href="#">View Order</a>   <a href="#">Reorder</a>
00000002	6/7/17	Veronica Costello	\$39.64	Complete	<a href="#">View Order</a>   <a href="#">Reorder</a>

### *My Account*

## Configuring Account Options

The customer account settings determine the information that is collected during customer registration, and the experience that customers have during the process. Customer configuration settings include:

- [Account Scope](#)
- [Login Landing Page](#)
- [New Account Options](#)
- [Name and Address Options](#)
- [Password Options](#)
- [Customer Session Lifetime](#)

## Login Landing Page

You can configure your store to redirect customers to their account dashboard after they log in, or let them continue shopping.

### To set the login landing page:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Login Options** section.



### *Login Options*

4. Set **Redirect Customer to Account Dashboard after Logging in** to one of the following:  

Yes	The account dashboard appears when customers log in to their accounts.
No	Customers can continue shopping after logging in to their accounts.
5. When complete, tap **Save Config.**

## New Account Options

In the Create New Account Options section of the configuration, the basic account options are combined with more advanced options that relate to VAT ID Validation and custom integrations. The following instructions cover only the most frequently used options. To learn about automatic customer group assignments, see: [VAT ID Validation](#).

**Create New Account Options**

<b>Enable Automatic Assignment to Customer Group</b> <small>[store view]</small>	No	
<b>Default Group</b> <small>[store view]</small>	General	<input checked="" type="checkbox"/> Use system value
<b>Default Value for Disable Automatic Group Changes Based on VAT ID</b> <small>[global]</small>	No	
<b>Show VAT Number on Storefront</b> <small>[website]</small>	No	<input checked="" type="checkbox"/> Use system value
	<small>To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.</small>	
<b>Default Email Domain</b> <small>[store view]</small>	example.com	<input checked="" type="checkbox"/> Use system value
<b>Default Welcome Email</b> <small>[store view]</small>	New Account (Default)	<input checked="" type="checkbox"/> Use system value
	<small>Email template chosen based on theme fallback when "Default" option is selected.</small>	
<b>Default Welcome Email Without Password</b> <small>[store view]</small>	New Account Without Password (Default)	<input checked="" type="checkbox"/> Use system value
	<small>This email will be sent instead of the Default Welcome Email, if a customer was created without password.</small>	
	<small>Email template chosen based on theme fallback when "Default" option is selected.</small>	
<b>Email Sender</b> <small>[store view]</small>	General Contact	<input checked="" type="checkbox"/> Use system value
<b>Require Emails Confirmation</b> <small>[website]</small>	No	<input checked="" type="checkbox"/> Use system value
<b>Confirmation Link Email</b> <small>[store view]</small>	New Account Confirmation Key (Default)	<input checked="" type="checkbox"/> Use system value
	<small>Email template chosen based on theme fallback when "Default" option is selected.</small>	
<b>Welcome Email</b> <small>[store view]</small>	New Account Confirmed (Default)	<input checked="" type="checkbox"/> Use system value
	<small>This email will be sent instead of the Default Welcome Email, after account confirmation.</small>	
	<small>Email template chosen based on theme fallback when "Default" option is selected.</small>	
<b>Generate Human-Friendly Customer ID</b> <small>[global]</small>	No	

*Create New Account Options*

### To set up the basic customer account options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Create New Account Options** section. Then, do the following:
  - a. Set **Default Group** to the customer group that is assigned to new customers when an account is created.
  - a. If you have a Value Added Tax number, and want it to be visible to customers, set **Show VAT Number on Storefront** to “Yes.”
  - b. Enter the **Default Email Domain** for the store. For example: mystore.com
  - c. Set **Default Welcome Email** to the template that is used for the Welcome email sent to new customers.
  - d. Set **Default Welcome Email without Password** to the template that is used when a customer account is created that does not yet have a password. For example, a customer account created from the Admin does not yet have a password assigned.
  - e. Set **Email Sender** to the store contact that appears as the sender of the Welcome email.
  - f. To require that customers confirm their request to open an account with your store, set **Require Emails Confirmation** to “Yes.” Then, set **Confirmation Link Email** to the template that is used for the confirmation email.
  - g. Set **Welcome Email** to the template that is used for the Welcome message that is sent after the account is confirmed.
4. When complete, tap **Save Config**.



## Name and Address Options

The Name and Address Options determine which attributes are included in the names and addresses that appear in the **customer account**.

### To configure the customer name and address:

1. On the Admin sidebar, click **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Name and Address Options** section.

**Name and Address Options** ☺

**Prefix Dropdown Options**   Use Default  
[website]  
Semicolon (;) separated values.  
Leave empty for open text field.

**Suffix Dropdown Options**   Use Default  
[website]  
Semicolon (;) separated values.  
Leave empty for open text field.

**Show Telephone**   Use Default  
[website]

**Show Company**   Use Default  
[website]

**Show Fax**   Use Default  
[website]


*Name and Address Options*

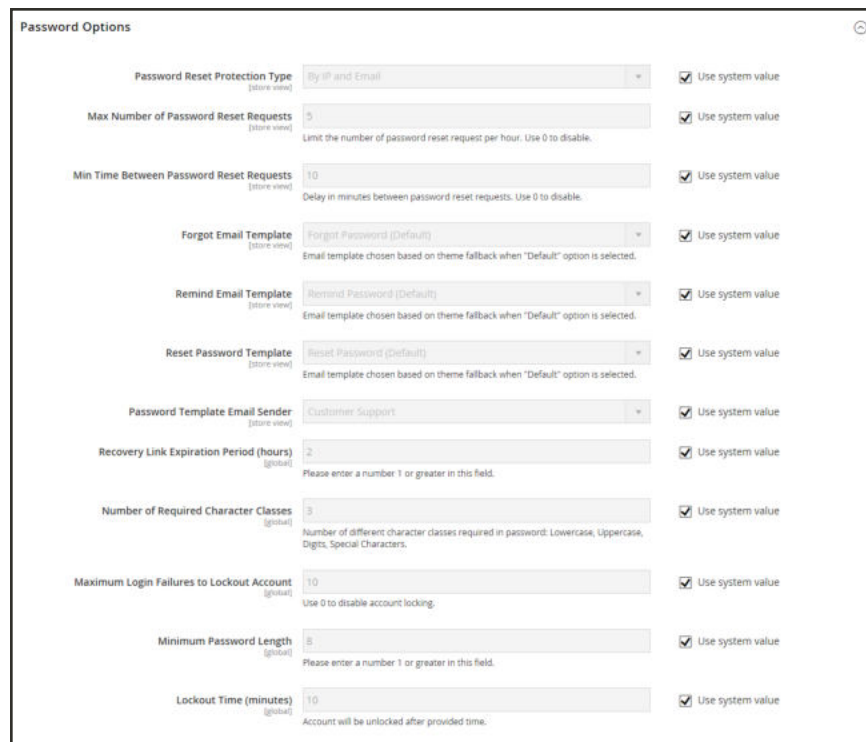
1. In the **Prefix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
2. In the **Suffix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
3. To include additional fields, do the following:
  - a. Set **Show Telephone** to “Yes.”
  - b. Set **Show Company** to “Yes.”
  - c. Set **Show Fax** to “Yes.”
4. When complete, click **Save Config**.

## Password Options

The customer password options control the level of security that is used for password reset requests, and determines the email templates that are used for customer notification, and the lifetime of the password recovery link. You can allow customers to change their own passwords, or require that only store administrators can do so

### To configure customer password options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**. Then, expand  the **Password Options** section.



The screenshot shows the 'Password Options' configuration panel. It includes the following settings:

- Password Reset Protection Type:** By IP and Email (dropdown), with a checkbox for 'Use system value'.
- Max Number of Password Reset Requests:** 5 (input field), with a checkbox for 'Use system value' and a note: 'Limit the number of password reset request per hour. Use 0 to disable.'
- Min Time Between Password Reset Requests:** 10 (input field), with a checkbox for 'Use system value' and a note: 'Delay in minutes between password reset requests. Use 0 to disable.'
- Forgot Email Template:** Forgot Password (Default) (dropdown), with a checkbox for 'Use system value' and a note: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Remind Email Template:** Remind Password (Default) (dropdown), with a checkbox for 'Use system value' and a note: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Reset Password Template:** Reset Password (Default) (dropdown), with a checkbox for 'Use system value' and a note: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Password Template Email Sender:** Customer Support (dropdown), with a checkbox for 'Use system value'.
- Recovery Link Expiration Period (hours):** 2 (input field), with a checkbox for 'Use system value' and a note: 'Please enter a number 1 or greater in this field.'
- Number of Required Character Classes:** 3 (input field), with a checkbox for 'Use system value' and a note: 'Number of different character classes required in password: Lowercase, Uppercase, Digits, Special Characters.'
- Maximum Login Failures to Lockout Account:** 10 (input field), with a checkbox for 'Use system value' and a note: 'Use 0 to disable account locking.'
- Minimum Password Length:** 8 (input field), with a checkbox for 'Use system value' and a note: 'Please enter a number 1 or greater in this field.'
- Lockout Time (minutes):** 10 (input field), with a checkbox for 'Use system value' and a note: 'Account will be unlocked after provided time.'

### *Password Options*

3. Set **Password Reset Protection Type** to the method you want to use for managing password reset requests:

**By IP and Email**      The password can be reset online after a response is received from a reset notification sent to the email address associated with the Admin account.

**By IP**                      The password can be reset online without additional confirmation.

By Email	The password can be reset only by responding to an email notification that is sent to the email address associated with the Admin account.
None	The password can be reset only by the store administrator.

4. To limit the number of password reset requests sent per hour, do the following:
  - a. In the **Max Number of Password Reset Requests** field, enter the maximum number of password reset requests that can be sent per hour.
  - b. In the **Min Time Between Password Reset Requests** field, enter the minimum number of minutes that must elapse between requests.
5. To configure the password reset email notification, do the following:
  - a. Set **Forgot Email Template** to the template that is used for the email sent to customers who have forgotten their passwords.
  - b. Set **Remind Email Template** to the template that is used when a password hint is sent to customers.
  - c. Set **Reset Password Template** to the template that is used when customers change their passwords.
  - d. Set **Password Template Email Sender** to the **store contact** that appears as the sender of password-related notifications.
6. Complete the following password reset security options:
  - a. In the **Recovery Link Expiration Period (hours)** field, enter the number of hours before the password recovery link expires.
  - b. In the **Number of Required Character Classes** field, enter the number of different character types that must be included in a password, based on the following character classes:
    - Lowercase
    - Uppercase
    - Numeric
    - Special Characters
  - c. In the **Maximum Login Failures to Lockout Account** field, enter the number of failed login attempts until the Admin account is locked. For unlimited attempts, enter zero (0).
  - d. In the **Minimum Password Length** field, enter the minimum number of characters that can be used in a password. The number must be greater than zero.
  - e. In the **Lockout Time (minutes)** field, enter the number of minutes an Admin account is locked after too many failed attempts to log in.
7. When complete, tap **Save Config.**

## Customer Session Lifetime


The lifetime of a customer shopping session is determined by several factors, including the length of the server session, the use of a **persistent cart**, and the lifetime of information that is stored in the browser. Although these are related to the same customer experience, they are actually separate processes with different expiration events and lifetimes.

Session	Information that is stored on the server, such as the contents of the shopping cart. If the server <b>session</b> expires before the cookie expires, customers might lose the cart contents and reduce security risk.
Session Cookie	Information that is stored in the browser as a number or string of characters. If the session cookie expires before the server session, the customer is logged out. The session cookie is deleted when the customer closes the browser window. By default, the cookie lifetime is set to 3600 seconds, or one hour. If there is no keyboard activity during that time, the current session ends, and customers must log back into their accounts to continue shopping.

If **Persistent Cart** is enabled, the cart contents are saved for the next time customers sign into their accounts. When using a persistent cart, it is recommended that you set the lifetime of the server session and the session cookie to a long period of time.

On the server, the length of the session is controlled by `php.ini`, and several variables. At this time, Magento does not have an Admin configuration setting that controls the length of the server session.

### To configure the cookie lifetime:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If you have multiple stores, set the **Store View** chooser in the upper-right corner to the store where the configuration applies.
3. In the panel on the left under **General**, choose **Web**.
4. Expand  the **Default Cookie Settings** section.



Default Cookie Settings

Cookie Lifetime   Use system value

Cookie Path

Cookie Domain

Use HTTP Only   Use system value

**Warning:** Do not set to "No". User security could be compromised.

Cookie Restriction Mode   Use system value

#### *Default Cookie Settings*

5. To change the default, clear the **Use system value** checkbox. Then, enter the new value in seconds.
6. Tap **Save Config.**

## Creating a Customer Account

Visitors to your store can open an account to manage their purchases and activities. Customers usually create their own accounts from your store. However, you can also create customer accounts directly from the Admin, which is useful for helping customers over the phone.

The following instructions represent the default customer account configuration. To change the selection and behavior of some of the fields in the form, see: [Configuring Account Options](#).



*Create an Account*

### Method 1: Create Account from Storefront

1. From the storefront, click the **Create an Account** link in the upper-right corner of the header.
2. Under **Personal Information**, enter your **First Name** and **Last Name**.

 A screenshot of the "Personal Information" form. The form has a title "Personal Information" at the top. Below the title, there are two input fields: "First Name" and "Last Name". At the bottom of the form, there is a checkbox labeled "Sign Up for Newsletter".

*Personal Information*

3. If you want to add your name and email address to the list of newsletter subscribers, mark the **Sign Up for Newsletter** checkbox.

This option appears even if the store doesn't publish a newsletter.

4. Under **Sign-in Information**, enter your **Email** address.

This email address will become part of your sign-in credentials, and cannot be associated with any other customer account.

*Sign-in Information*

5. Enter a **Password** that includes three of the following types of information:
  - Lowercase characters
  - Uppercase characters
  - Numbers
  - Special Characters

After you press **Enter**, the strength of the password is evaluated, and appears below the field. If the password is considered to be “Weak,” try another until it evaluated as “Strong”.

Then, enter it again to **Confirm Password**.

6. When complete, tap **Create an Account**.

You can now use your email address and password to **sign in** to your account to complete the address information.

### Method 2: Create Account from Admin

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Tap **Add New Customer**.



## Step 1: Complete the Account Information

The screenshot shows the 'New Customer' form in a Magento system. The form is titled 'New Customer' and is divided into two main sections: 'CUSTOMER INFORMATION' and 'Account Information'. The 'Account Information' section is currently active and contains several fields: 'Associate to Website' (set to 'Main Website'), 'Group' (set to 'General'), a checkbox for 'Disable Automatic Group Change Based on VAT ID', 'Name Prefix', 'First Name', 'Middle Name/Initial', 'Last Name', 'Name Suffix', 'Email', 'Date of Birth', 'Tax/VAT Number', 'Gender', 'Send Welcome Email From' (set to 'Default Store View'), and 'Vertex Customer Code'. The form also includes navigation buttons: 'Back', 'Reset', 'Save and Continue Edit', and 'Save Customer'.

### *Customer Information*

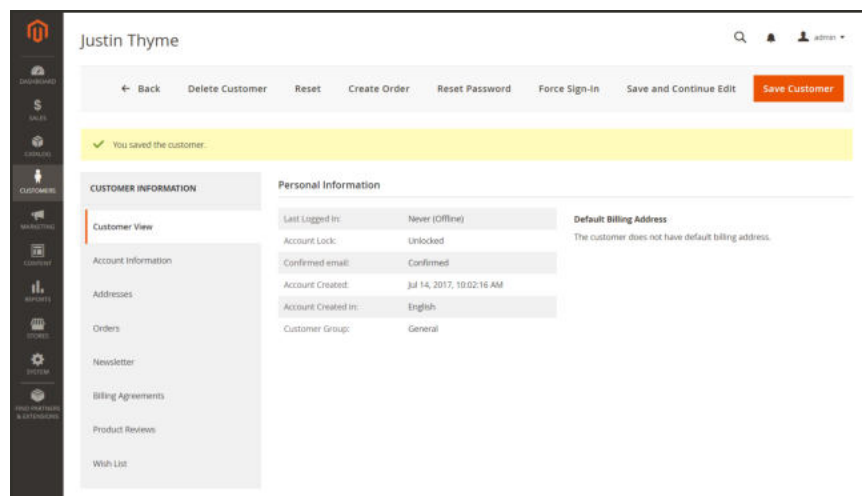
1. In the **Account Information** section, do the following:
  - a. For a multisite installation, set **Associate to Website** to the website where the customer account applies.
  - b. If applicable, assign the customer to a different **Customer Group**.
  - c. If using **VAT ID Validation**, and want to **Disable Automatic Group Change Based on VAT ID**, mark the checkbox.
2. Complete the required fields:
  - First Name
  - Last Name
  - Email
3. Complete the optional fields as needed:
  - Name Prefix
  - Middle Name/Initial
  - Name Suffix

- Date of Birth
  - Tax/VAT Number
  - Gender
4. Set **Send Welcome Email From** to the store view from which the Welcome email is to be sent.

If the store has views for different **languages**, this setting determines the language of the Welcome email.

5. If **Vertex Cloud** is enabled, enter the **Vertex Customer Code** that you want to use for this customer.
6. Tap **Save and Continue Edit**.

After the customer account is saved, the full set of options appears in the panel on the left and in the menu at the top of the page. The Customer View tab displays a summary of the account.



*Customer View*

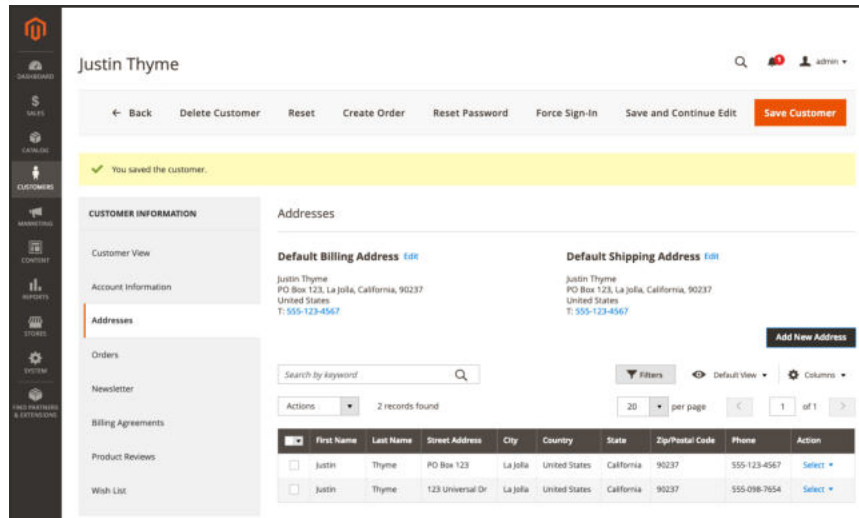
## Step 2: Complete the Address Information

1. In the panel on the left, choose **Addresses**. Then, tap **Add New Addresses**.
2. If the same address is used for both billing and shipping, toggle both options.
  - Default Billing Address
  - Default Shipping Address

*Add an Address*

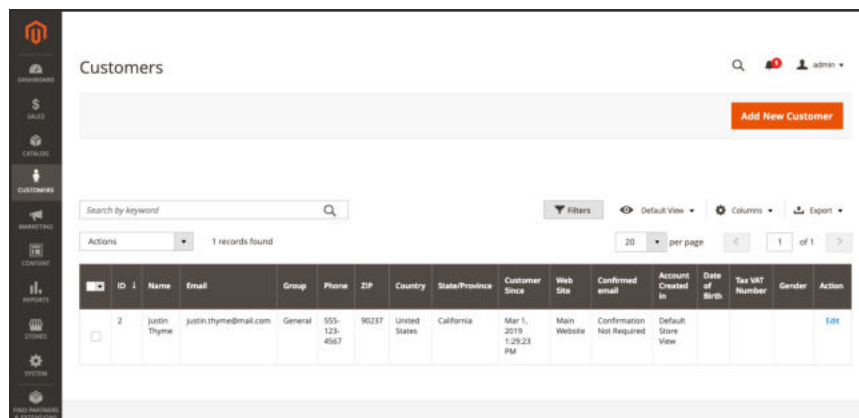
3. Scroll down and complete the required address fields in the second column.
  - Street Address
  - City
  - Country
  - State/Province
  - ZIP/Postal Code
4. Enter the **Phone Number** for this address.
5. If applicable, enter the **VAT Number** associated with the customer.
6. If this is the only address that is needed for the account, tap **Save**. Otherwise, tap **Save and Continue Edit**. Repeat to add additional addresses.

The new address displays in the Addresses view with the selected Default Billing and Default Shipping addresses above the full list.



Addresses view

The new customer account now appears in the Customers grid.



Customers grid

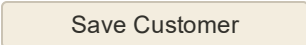
### Step 3: Reset the Password

Customer accounts created from the Admin do not initially have passwords assigned.

1. Find the new customer account in the grid.
2. In the **Action** column, click **Edit**.
3. In the menu bar at the top of the page, click **Reset Password**.

Notification is sent to the account owner, with instructions for setting the password.

### Button Bar

BUTTON	DESCRIPTION
Additional buttons become available when the profile is saved for the first time. To learn more, see: <a href="#">Updating a Customer Profile</a> .	
Back	Returns to the Customers page without saving changes.
Delete Customer	Deletes the current customer. Completed orders associated with the customer are not removed.
Reset	Resets any unsaved changes in the customer form to their previous values.
Create Order	Creates a new order for the customer.
Reset Password	Sends a <a href="#">reset password</a> link to the customer by email.
Force Sign-in	Revokes the OAuth access tokens that are associated with the customer account. This can be used only with customer accounts that have been assigned OAuth tokens, as part of a <a href="#">Web API integration</a> . To learn more, see: <a href="#">OAuth-based authentication</a> .
Manage Shopping Cart	Allows the administrator to manage the shopping cart for the customer.
Save and Continue Edit	Saves changes, and keeps the customer profile open.
	Saves changes, and closes the customer profile.

### Field Descriptions

FIELD	DESCRIPTION
<b>ACCOUNT INFORMATION</b>	
Associate to Website	Identifies the website associated with the customer account.
Group	Identifies the <a href="#">customer group</a> to which the customer belongs. If applicable, mark the checkbox to disable automatic group change based on VAT.
Name Prefix	If used, the prefix that is associated with the customer's name. For example: Mr., Ms, or Dr.  The prefix values are determined by the <a href="#">configuration</a> . Depending on the configuration, the input control might be a text field or a drop-down list of options.
First Name	The customer's first name.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Middle Name / Initial	The middle name or initial of the customer. This field is included only if specified in the <a href="#">configuration</a> .
Last Name	The customer's last name.
Name Suffix	If used, the suffix that is associated with the customer's name. For example: Jr., Sr., or III.  The suffix values are determined by the <a href="#">configuration</a> . Depending on the configuration, the input control might be a text field or a drop-down list of options.
Email	The customer's email address.
Date of Birth	The customer's date of birth. The date of birth is included if specified in the <a href="#">configuration</a> .
Tax / VAT Number	The customer's Tax or Value Added Tax number, if applicable.
Gender	Identifies the customer's gender. The gender is included if specified in the <a href="#">configuration</a> . Options: Male Female Not Specified
Send Welcome Email From	If you have multiple store views, identifies the store view from which the Welcome message is sent. If store views are used for different languages, this determines the language of the Welcome email.
Vertex Customer Code	(Requires Vertex Cloud) A unique code that is referenced for <a href="#">customer exceptions</a> . The code can be an abbreviation of the customer name, number, or alphanumeric string.

**ADDRESSES**

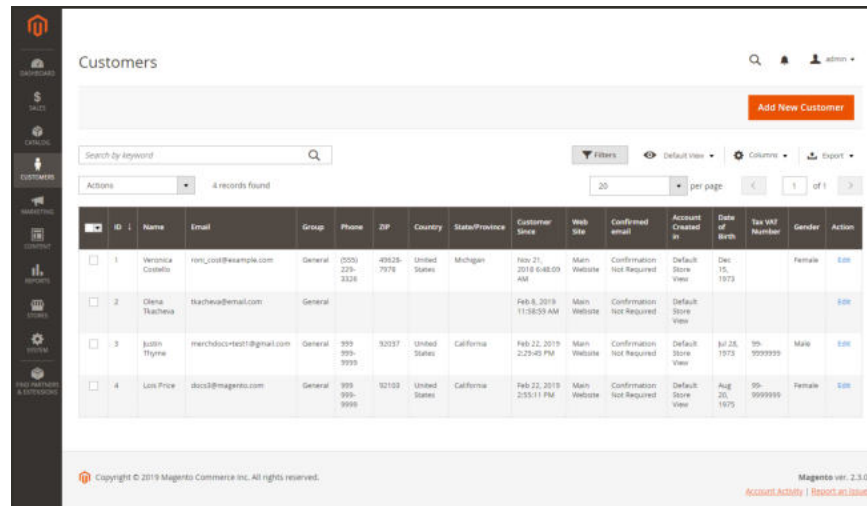
New Addressees	Identifies the type of new address. Options: Default Billing Address Default Shipping Address
<input type="button" value="Add New Addresses"/>	Displays another New Address section to identify the type of the address to be entered.
Company	The company name, if applicable for this address.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Street Address	The street address of the customer. A second line of the street address is available if specified in the <a href="#">configuration</a> .
City	The city where the customer address is located.
Country	The country where the customer address is located.
State/Province	The state or province where the customer address is located.
Zip/Postal Code	The ZIP or postal code where the customer address is located.
Phone Number	The customer's phone number that is associated with address.
VAT Number	If applicable, the value added tax number that applies to the customer at this address.

## Managing Customer Accounts

Use the Customers grid to find any customer account. You can use the standard **workplace controls** to filter the list, change the **column layout**, save views, and export data. The **Actions control** above the grid can be used to apply an operation to multiple customer records.



All Customers

### To apply an action:

The following actions can be applied to either single or multiple records.

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. In the first column of the grid, mark the checkbox of each record that you want to update. Then, follow the instructions for the action that you want to apply:

### Delete Customer Accounts

Deleted customer accounts cannot be restored. Information about customer activity and transactions is retained in the system.

1. Set the **Actions** control to “Delete”.
2. When prompted to confirm, tap **OK**.



### Subscribe to Newsletter

1. Set the **Actions** control to “Subscribe to newsletter”.
2. When prompted to confirm, tap **OK**.

### Unsubscribe from Newsletter

1. Set the **Actions** control to “Unsubscribe to newsletter”.
2. When prompted to confirm, tap **OK**.

### Assign a Customer Group

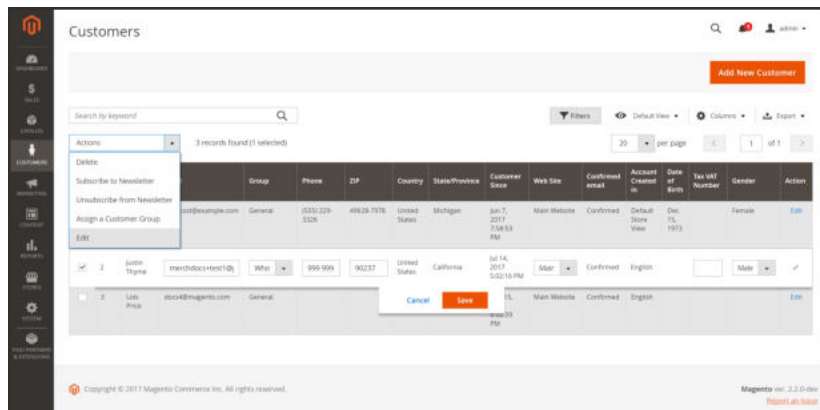
1. Set the **Actions** control to “Assign a customer group”.
2. Choose the customer group to which all selected customer records are to be assigned.
3. When prompted to confirm, tap **OK**.

### Edit a Customer Account

#### Method 1: Quick Edit

1. In the first column, mark the checkbox of the customer account to be edited.
2. Set the **Actions** column to “Edit.”

The value of each value that can be updated appears in a text box. Only some values of the selected customer record can be edited from the grid.



Quick Edit

3. Update any of the following values, as needed:
  - Email
  - Group
  - Phone
  - ZIP
  - Web Site
  - Tax/VAT Number
  - Gender
4. Tap **Save**.

### Method 2: Full Edit

1. In the grid, find the customer record to be edited.
2. In the **Actions** column on far right, click **Edit**.
3. Make the necessary changes to the company information.

To learn more, see: [Updating a Customer Profile](#).

3. When complete, tap **Save**.

**Actions Control**

OPTION	DESCRIPTION
Delete	Deletes selected customer accounts.
Subscribe to Newsletter	Subscribes selected customers to newsletter.
Unsubscribe from Newsletter	Unsubscribes selected customers from newsletter.
Assign a Customer Group	Assigns selected customers to a customer group.
Edit	Allows some values of a single selected customer record to be edited from the grid. By default, the following values are available for a quick edit: Email, Group, Phone, ZIP, Web Site, Tax VAT Number, and Gender.

## Column Descriptions

FIELD	DESCRIPTION
Select	Mark the checkbox to select customer records that are to be subjects of an action. Or, use the selection control in the column header to select/deselect all.
ID	A unique numeric identifier that is assigned when the customer account is created.
Name	The first and last name of the customer.
Email	The email address of the customer.
Group	The customer group to which the customer is assigned.
Phone	The phone number of the customer.
ZIP	The ZIP or postal code of the customer.
Country	The country where the customer is located.
State/Province	The state or province where the customer is located.
Customer Since	The date and time the customer account was created.
Web Site	The web site in the store hierarchy to which the customer account is associated.
Confirmed Email	Indicates if a confirmation email is required to be sent.
Account Created In	Indicates the store view from which the customer account was created.
Date of Birth	The date of birth of the customer.
Tax / VAT Number	If applicable, the tax number or <b>value-added tax</b> number that is assigned to the customer. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">This field is not the same as the VAT Number</div>
Gender	The gender of the customer.
Action	Edit                      Opens the company account in edit mode.

### ADDITIONAL COLUMNS

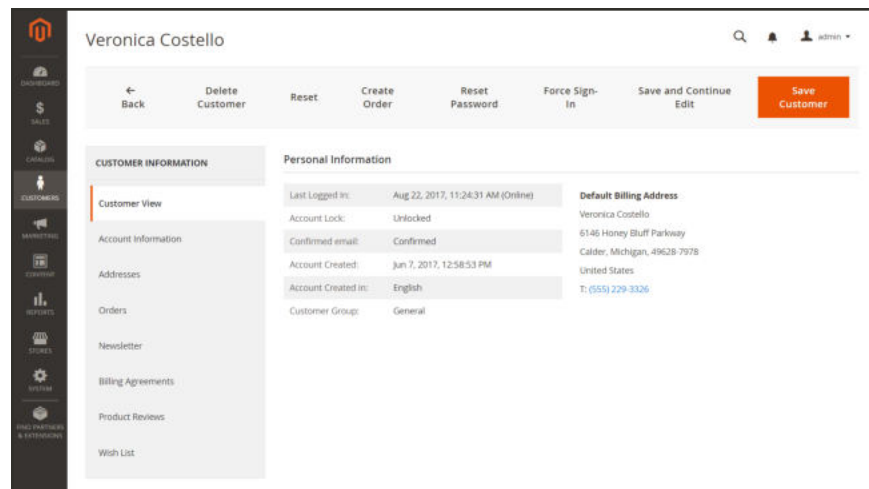
The following columns are available by changing the **column layout** of the grid.

**Column Descriptions (cont.)**

FIELD	DESCRIPTION
Company	The company name of the customer.
Street Address	The street address of the customer.
City	The city where the customer is located.
Fax	The fax number of the customer, if applicable.
Billing Firstname	The first name in the billing address of the customer.
Billing Lastname	The last name in the billing address of the customer.
Billing Address	The address where billing information is to be sent.
Shipping Address	The address where orders are to be shipped.
VAT Number	<p>The value-added tax number that is associated with the customer address. For <b>digital goods</b> sold in the EU, the VAT is based on the billing address of the customer.</p> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9; margin-top: 10px;">This field is not the same as the Tax/VAT Number.</div>
Account Lock	Indicates the status of the account. As a security measure, customer accounts can be <b>locked</b> after too many login attempts. Values: Locked / Unlocked

## Updating a Customer Profile

The panel on the left of the Customer Information page includes information about customer activity, such as when the customer last signed in or out of their account, addresses, order statistics, recent orders, shopping cart contents, product reviews, newsletter subscriptions, and so on.

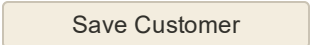


*Customer Profile*

### To update a customer profile:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the grid. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose the type of information you need to edit. Then, make any necessary changes to the field values, using the field descriptions for reference.
4. When complete, tap **Save Customer**.

**Button Bar**

BUTTON	DESCRIPTION
Back	Returns to the Customers page without saving changes.
Delete Customer	Deletes the customer account.
Reset	Resets any unsaved changes in the customer form to their previous values.
Create Order	Creates a new order that is associated with the customer account.
Reset Password	Resets the password of the customer.
Force Sign-In	Clears the tokens associated with the customer's password, and provides the administrator access to the account,
Save and Continue Edit	Saves changes, and keeps the customer account open.
	Saves changes, and closes the customer account.

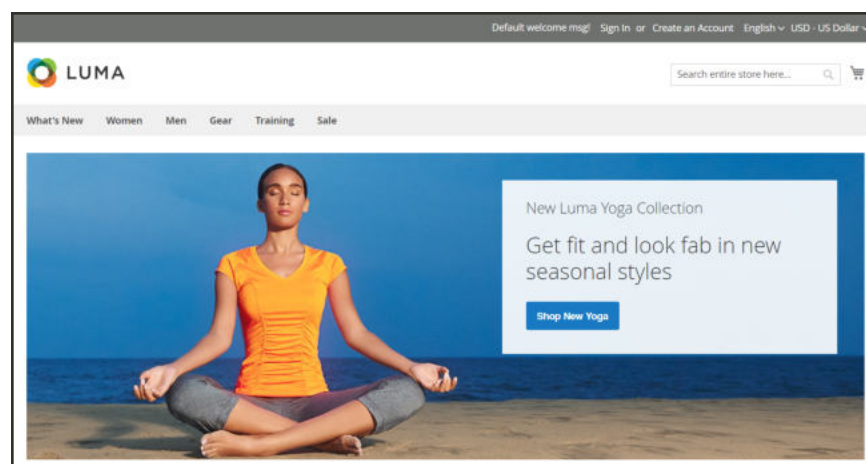
## Customer Sign In

Customers have easy access to their accounts from every page in your store. Depending on the **configuration**, customers can be redirected to their account dashboard, or continue shopping after they log in to their accounts.

If **Amazon Pay** is enabled for your store, customers who sign in with the credentials from their Amazon account can use the shipping addresses and payment methods that are available in their Amazon account during checkout. **Login with Amazon** requires customers to grant permission to share data from their Amazon accounts with your store.

If a **CAPTCHA** is enabled in the configuration, the person must correctly complete a test that verifies them to be human, before gaining access to their accounts.

When customers forget their passwords, a reset link is sent to the email address that is associated with the account. The number of times a customer can try to enter a password, the number of minutes between attempts, the number of total attempts before the account is locked, and the length of the lockout is set in the **Password Options** configuration.



*Sign In*



## To sign in to your customer account:

1. In the header of the store, click **Sign in**.

*Customer Login*

2. Enter your **Email** address and **Password**. Then, tap **Sign in**.

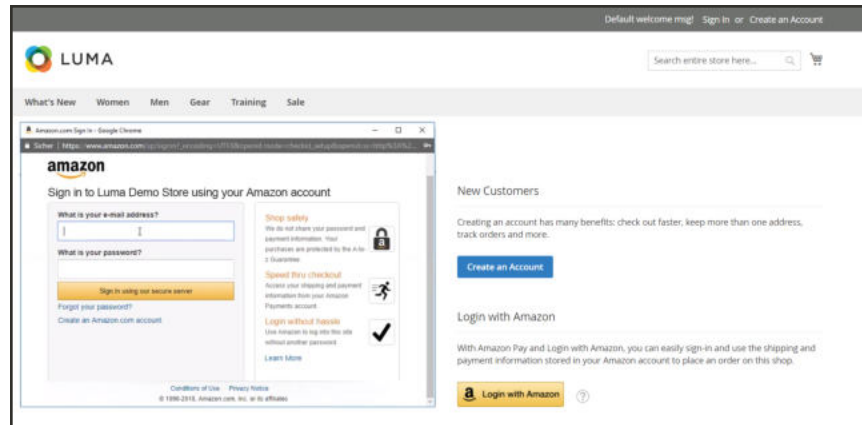
If you can't remember your password, click **Forgot Your Password?** Then, follow the **instructions** to reset your password.

## To sign in with Amazon:

1. In the header of the store, click **Sign in**.
2. Tap **Login with Amazon**.

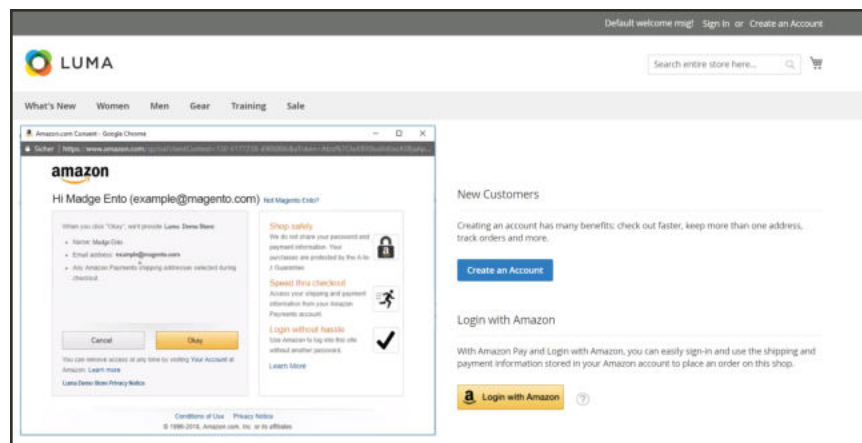
*Login with Amazon*

3. When prompted to sign in, enter the **email address** and **password** for your Amazon buyer account.



*Enter Your Amazon Credentials*

4. To grant Amazon permission to share the following information from your account with the store when processing your purchases, tap **Okay**.
- Your Name
  - Your Email Address
  - Shipping Addresses



*Grant Permission to Share Data*

## Resetting Passwords

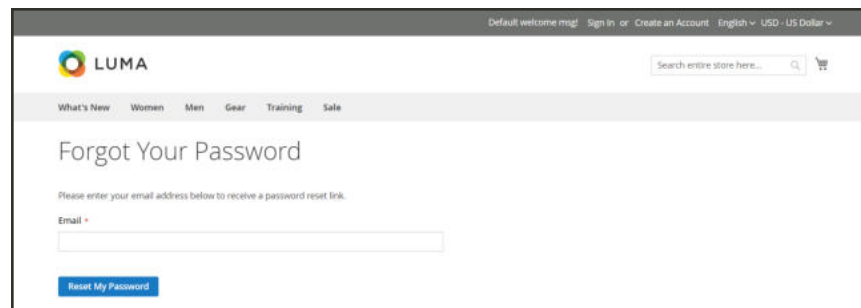
Customers usually reset their passwords from the storefront by clicking the “Forgot Your Password?” link.

However, the store administrator can initiate either a password reset or a forced sign-in from the Admin.

Reset Password	A password reset email is sent directly to the customer’s email account. At no time does the store administrator gain access to the customer’s password.
Force Sign In	Revokes the OAuth access tokens that are associated with the customer account. This can be used only with customer accounts that have been assigned OAuth tokens, as part of a Web API <a href="#">integration</a> . To learn more, see: <a href="#">OAuth-based authentication</a> .  Standard customer accounts created from the storefront or from the Admin do not have OAuth tokens.

### To reset a password from the storefront:

1. On the Login page, tap **Forgot Your Password?**
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Reset My Password**.



*Forgot Your Password*

If the email address you entered matches the one that is associated with the account, you will receive a "Password Reset Confirmation" email with a link to reset your password.

3. When the email arrives, click the reset password link, and when prompted, enter your **New Password**. Enter it again to confirm, and tap **Reset Password**.

Your new password must be six or more characters in length, without spaces.

When you receive confirmation that the password is updated, you can use the new password to sign in to your account.

### To reset a password from the Admin:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer account in the grid. Then in the **Action** column, click **Edit**.
3. In the set of options across the top of the page, tap **Reset Password**.

The number of password reset requests that are allowed within an hour is set in the [configuration](#).

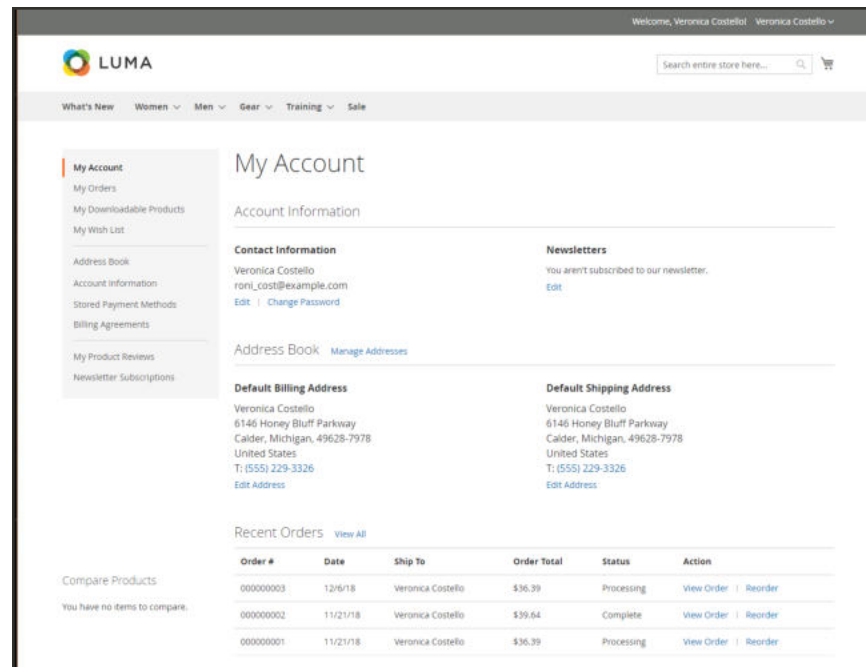
### To revoke a customer's OAuth tokens:

Do not proceed unless you are a developer familiar with API Authentication.

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer account in the grid. Then in the **Action** column, click **Edit**.
3. In the set of options across the top of the page, tap **Force Sign In**.
4. When prompted to confirm, tap **OK**.

## Account Dashboard

Customers can manage and monitor their own information and activities from their accounts. Customers can reorder, track orders, manage shipping addresses and payment methods, product reviews, newsletter subscriptions, and more.



*My Account*

## Account Dashboard

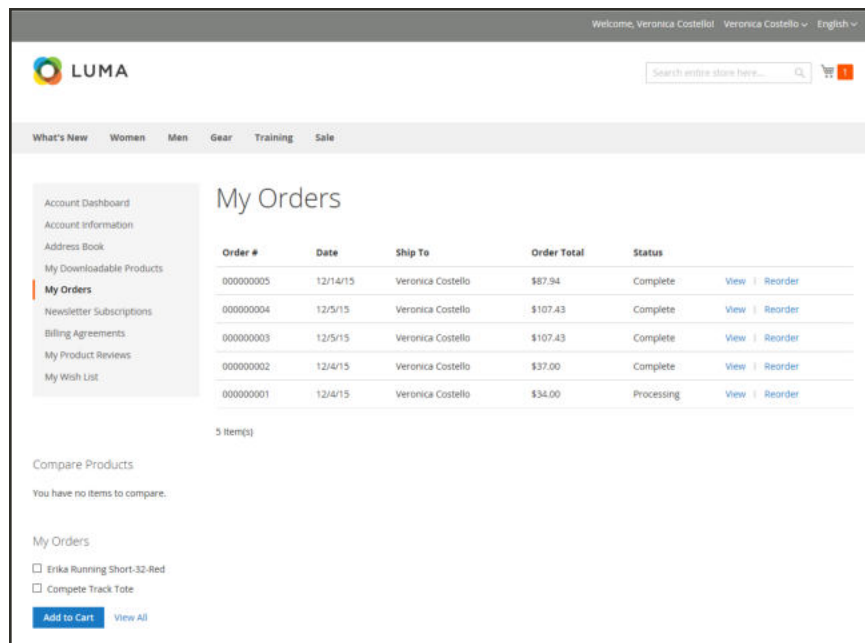
SECTION	DESCRIPTION
<b>My Orders</b>	Displays a list of all customer orders, with a link to each. If enabled in the configuration, any order can be reordered by simply clicking the Reorder link.
<b>My Downloadable Products</b>	Lists all downloadable products the customer has purchased, with a link to each.
<b>My Wish List</b>	Manage your wish lists, and place orders from wish list items.
<b>Address Book</b>	The customer address book includes the default billing and shipping address, and additional address entries.
<b>Account Information</b>	Customers can update their account information and change their password as needed. The store Admin can also update customer accounts and access the information to offer shopping assistance.

### Account Dashboard (cont.)

SECTION	DESCRIPTION
<a href="#">Stored Payment Methods</a>	Lists any payment methods with secure vaults that are used by the customer to store credit card information.
<a href="#">Billing Agreements</a>	Displays a list of any customer billing agreements.
<a href="#">My Product Reviews</a>	Displays a list of all product reviews submitted by the customer, with a link to each.
<a href="#">Newsletter Subscriptions</a>	Lists all available newsletters. Those to which the customer is currently subscribed have a checkmark.

## My Orders

You have access to all of your orders from your account dashboard. Orders can be viewed, tracked, and resubmitted as new orders. Depending on the status of the order, you can print orders, invoices, and shipment records.



*My Orders*

### To view an order:

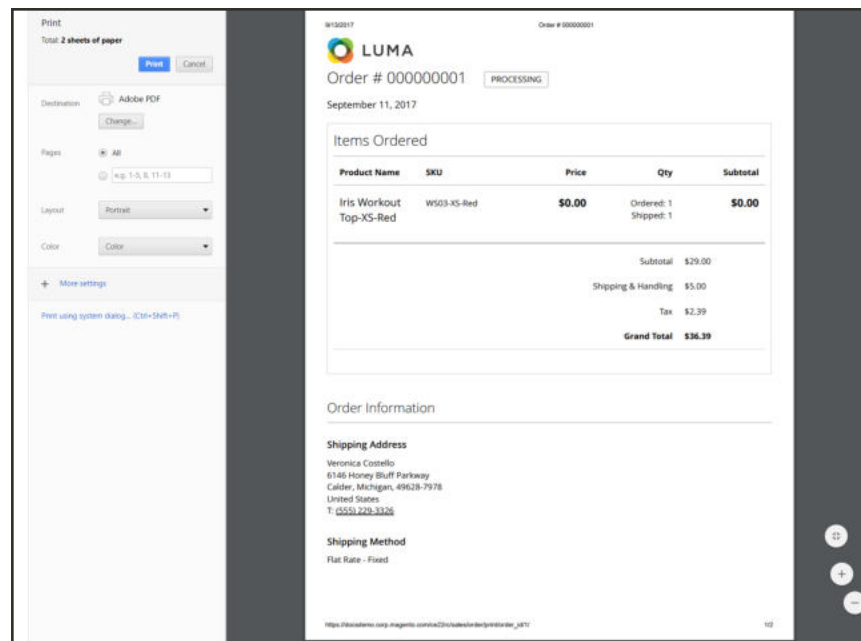
Find the order in the list, and click **View Order**. Then from the open order, do any of the following:

## Reorder

1. To create a new order that is a duplicate of the current order, click the **Reorder** link.
2. When the shopping cart appears with the items from the order, you can either continue shopping, or proceed to checkout.

## Print Order

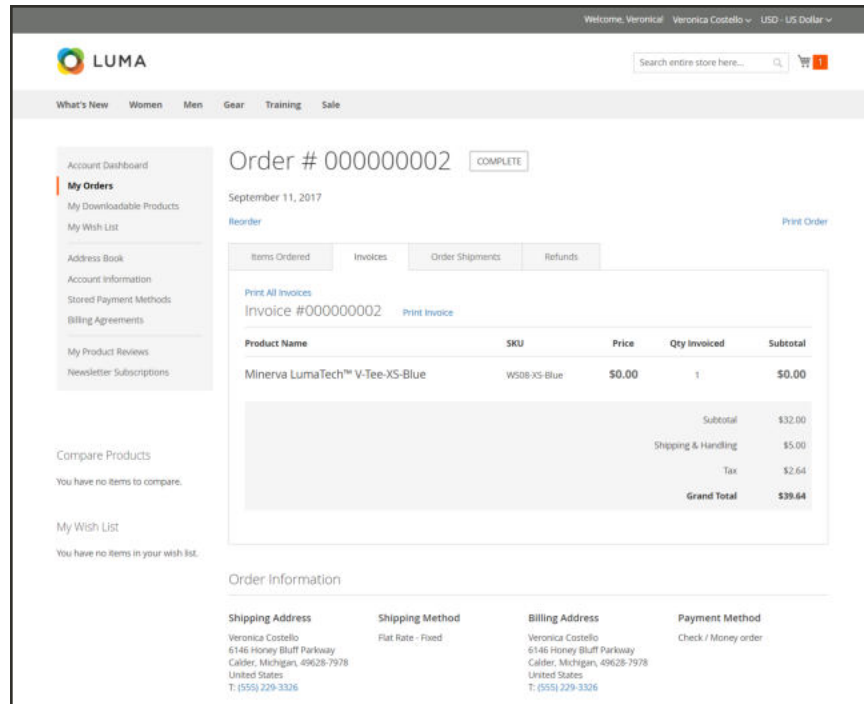
1. Click **Print Order**.
2. Verify the output device, or choose another.
3. Tap **Print**.



*Print Order*

## Print Invoices

1. On the **Invoices** tab, click one of the following:
  - Print All Invoices
  - Print Invoice
2. Verify the output device, or choose another.
3. Tap **Print**.



### Invoices

### Print Shipments

1. On the **Order Shipments** tab, click one of the following:
  - Print All Shipments
  - Print Shipment
2. Verify the output device, or choose another.
3. Tap **Print**.



Order # 000000002 COMPLETE

September 11, 2017

[Reorder](#) [Print Order](#)

Items Ordered | Invoices | **Order Shipments** | Refunds

[Print All Shipments](#)

Shipment #000000002 [Print Shipment](#) [Track this shipment](#)

Product Name	SKU	Qty Shipped
Minerva LumaTech™ V-Tee-XS-Blue	W508-XS-Blue	1

Order Information

Shipping Address	Shipping Method	Billing Address	Payment Method
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Flat Rate - Fixed	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Check / Money order

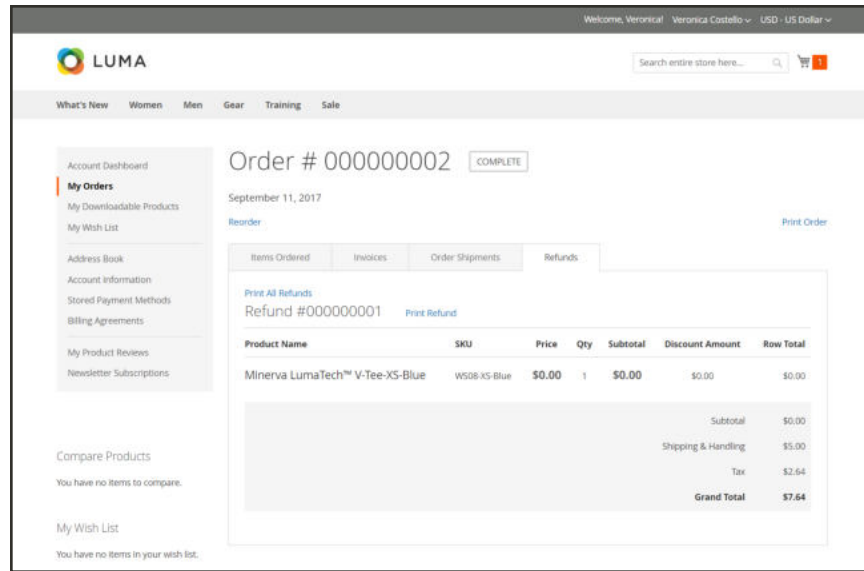
### Order Shipments

## Track a Shipment

1. On the **Order Shipments** tab, click **Track this Shipment**.
2. Any tracking information that is available appears in a popup window.
3. When ready, tap **Close Window**.

## Print Refunds

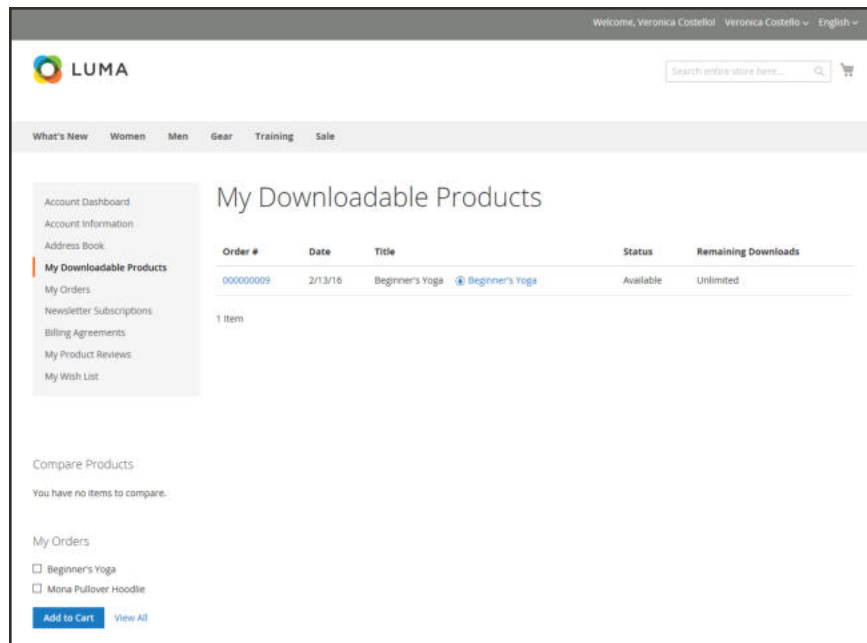
1. On the **Refunds** tab, click one of the following:
  - Print All Refunds
  - Print Refund
2. Verify the output device, or choose another.
3. Tap **Print**.



*Refunds*

## My Downloadable Products

The My Downloadable Products page links to each order of downloadable products. The downloads become available from the dashboard as soon as the order is complete.



*My Downloadable Products*

**To download a product:**

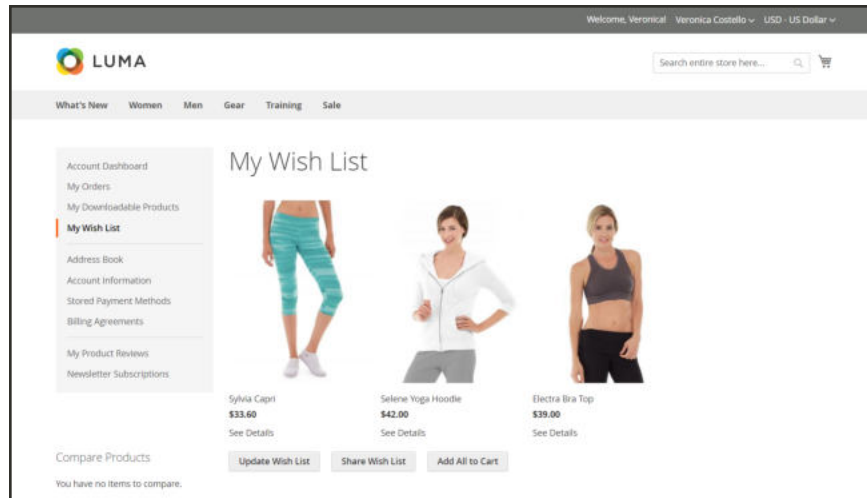
1. In your account dashboard, choose **My Downloadable Products**.
2. Find the order in the list, and click the download link after the title.
3. In the lower-right corner of the download window, click the download icon.
4. Look for the name of the download file to appear in the lower-left corner of the window. Then, save the file.



*Download Video*

## My Wish List

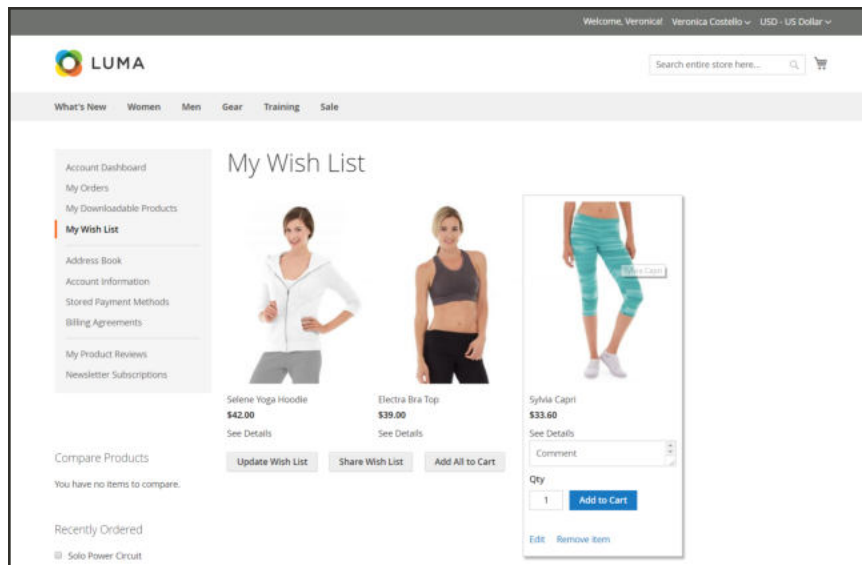
Your wish list is a convenient way to keep track of products that you like, but are not ready to buy. Items from your wish list can be shared with others, or added to the shopping cart.



*My Wish List*

### To update the product listing:

1. From your wish list, point to the product to display the options.
2. To add a **Comment** about the product, enter the text in the box below the price.



*Edit Options*

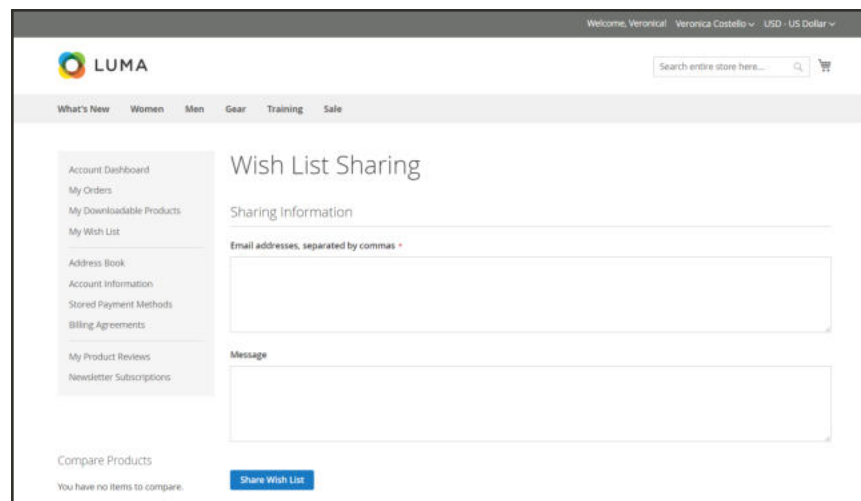
3. To change the selection of product options, click **Edit**. Then, do the following:
  - a. Update the options on the product detail page.
  - b. Click **Update Wish List**.

### To add a product to the cart:

1. In your wish list, point to the product that you want to add.
2. Update the **Qty** and edit the other options as necessary.
3. Tap **Add to Cart**.

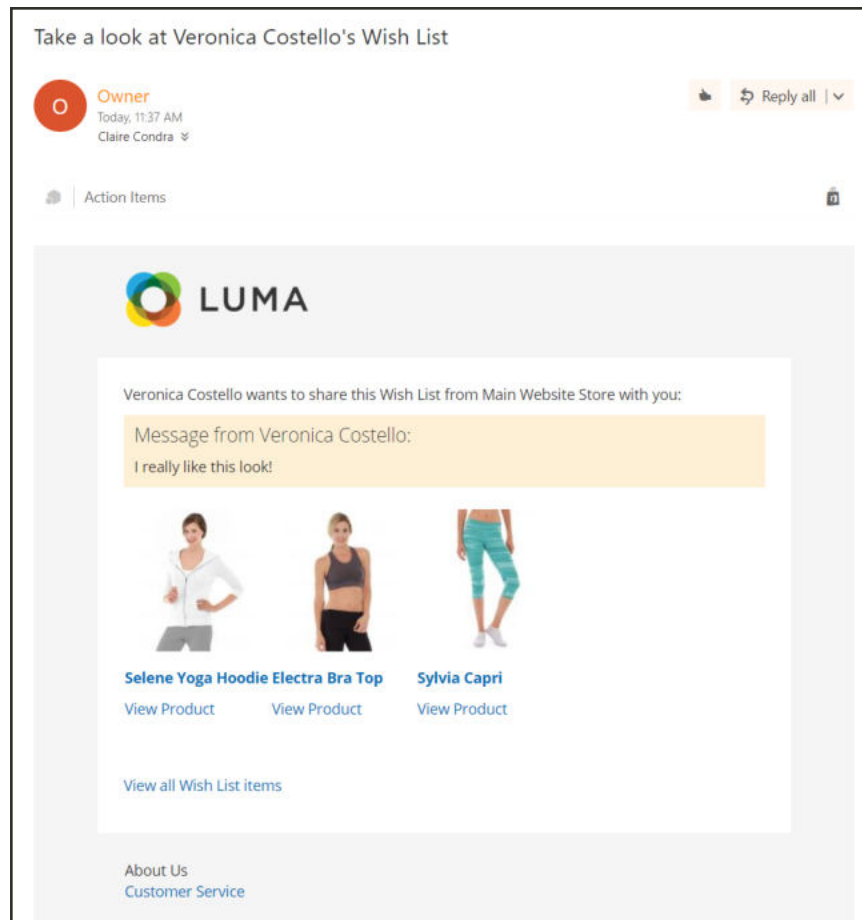
### To share your wish list:

1. Tap **Share Wishlist**.
2. Enter the email address of each person who is to receive your wish list, separated by a comma.
3. Add a **Message** to be included in the email.
4. Tap **Share Wish List**.



*Share Your Wish List*

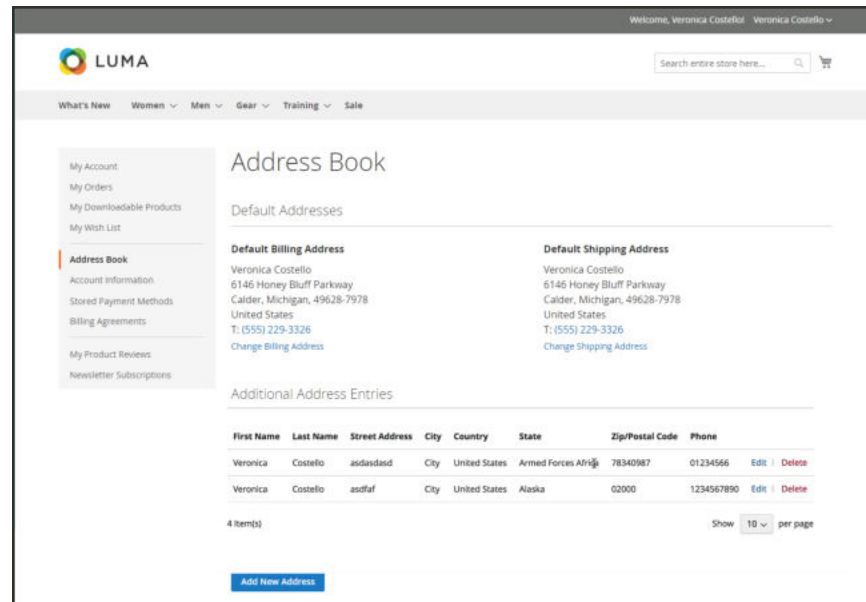
The message is sent from your primary **store contact**, and includes a thumbnail image of each product, with links to your store.



*Shared Wish List Email*

## Address Book

Customers who keep their address books current can speed through the checkout process. The address book contains the customer's default billing and shipping addresses, and any additional addresses that they frequently use. Additional address entries are easy to access and maintain from the grid. Each customer's address book can manage over 3,000 address book entries without impacting performance.



*Address Book*

### To add a new address:

1. In the sidebar of your customer account, choose **Address Book**.
2. On the Address Book page under **Additional Address** Entries, tap **Add New Address**. Then, do the following:



*Add New Address*

- a. Complete the contact and address information.

By default, the customer's first and last names initially appear in the form.

- b. Mark the following checkboxes to indicate how the address is to be used. Mark both checkboxes if the same address is used for billing and shipping.

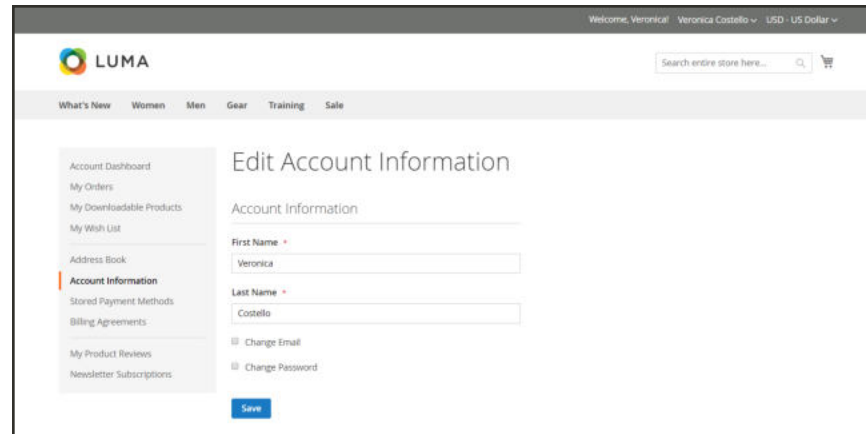
- Use as my default billing address
  - Use as my default shipping address
3. When complete, tap **Save Address**.

The new address appears in the grid.



## Account Information

The basic account information includes your name and email address, and password, and can be maintained from your account dashboard.



*Account Information*

### To update your account information:

In your Account Dashboard, choose **Account Information**. Then, do any of the following:

#### Update Your Name

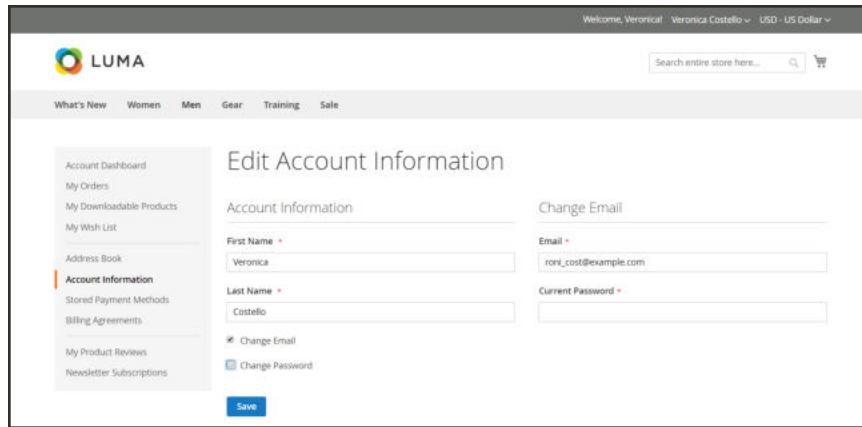
1. Update your **First Name** and **Last Name** as needed.

Additional fields appear as part of the name if the **Customer Configuration** includes a prefix, middle initial, and suffix.

2. Tap **Save**.

#### Change Your Email Address

1. Mark the **Change Email** checkbox.
2. Enter your new **Email** address.
3. Enter your **Current Password**.
4. Tap **Save**.



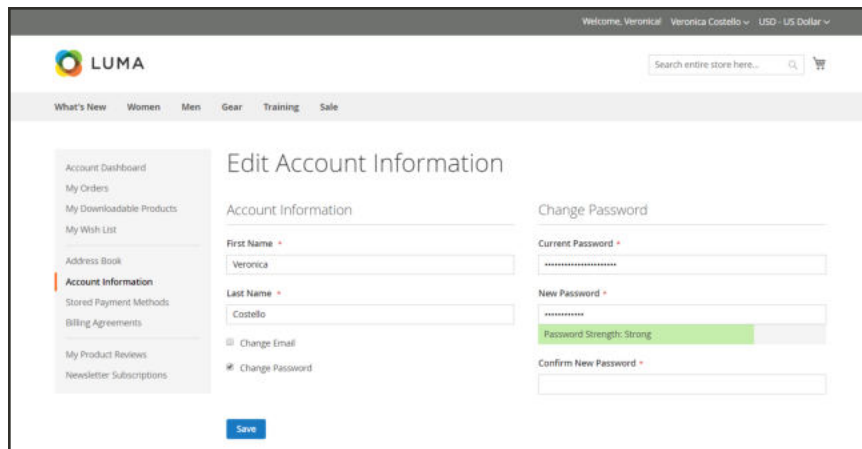
*Change Email Address*

### Change Your Password

1. Mark the **Change Password** checkbox.
2. Enter your **New Password**.

Choose a strong password that is at least eight characters long. Your password can include a combination of upper and lowercase letters, numbers, and symbols. Use the password strength indicator to help you choose the best password. Then, write it down.

3. When you are ready, enter it again to confirm.

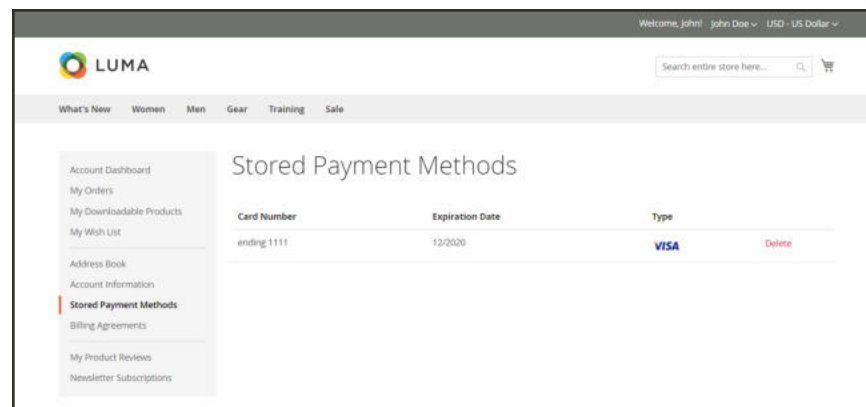


*Change Password*

## Stored Payment Methods

Customers with access to a secure vault for storing payment information can speed through checkout without entering their credit card information each time. If **Instant Purchase** is enabled, customers can bypass the two-step checkout process altogether, and place the order from the product page. A payment method that supports a secure vault, such as **Braintree**, is required.

Stored payment methods are available only for payment methods such as Braintree, that offer a secure vault. When secure vault is enabled in the payment method configuration, customers will have the option during checkout to save their credit card information as a stored payment method. Customers can manage stored payment methods from their account dashboard.



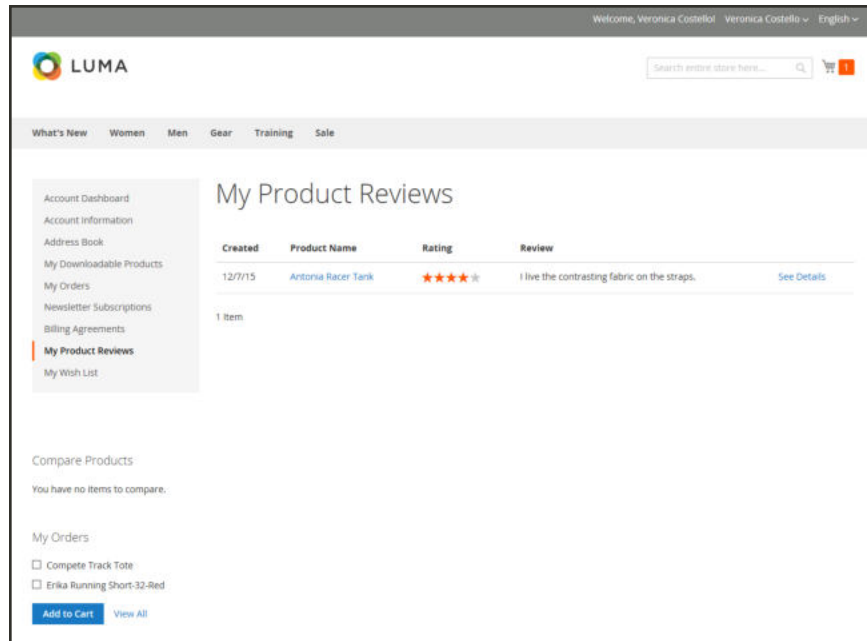
*Stored Payment Methods*

## Billing Agreements

Customers who enter into a billing agreement with a payment provider can make purchases now and pay for them later, according to the agreement. To learn more, see: [PayPal Billing Agreements](#).

## My Product Reviews

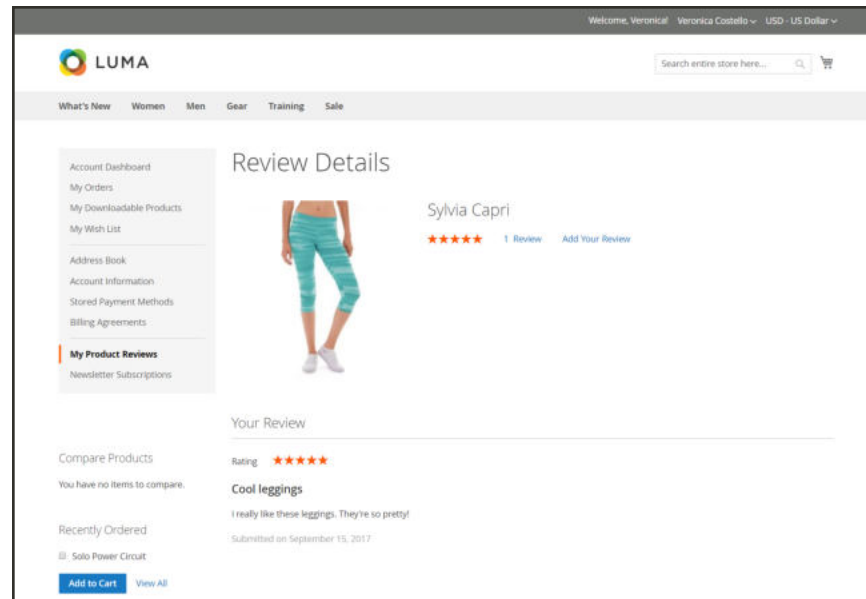
The My Product Reviews section of your account dashboard lists all the reviews that you have submitted from the storefront. Each review summary includes the date the review was submitted, and links to the product page, and review details.



*My Product Reviews*

## To access your product reviews:

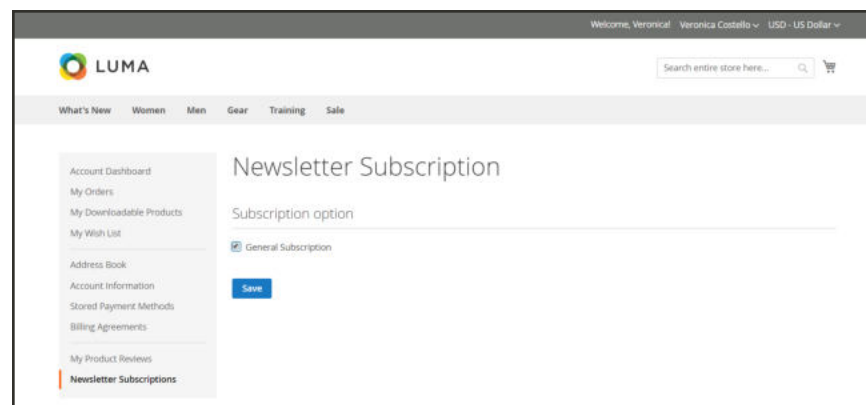
1. In the sidebar of your account dashboard, choose **My Product Reviews**.
2. To view the full review, click **See Details**.



*Review Details*

## Newsletter Subscription

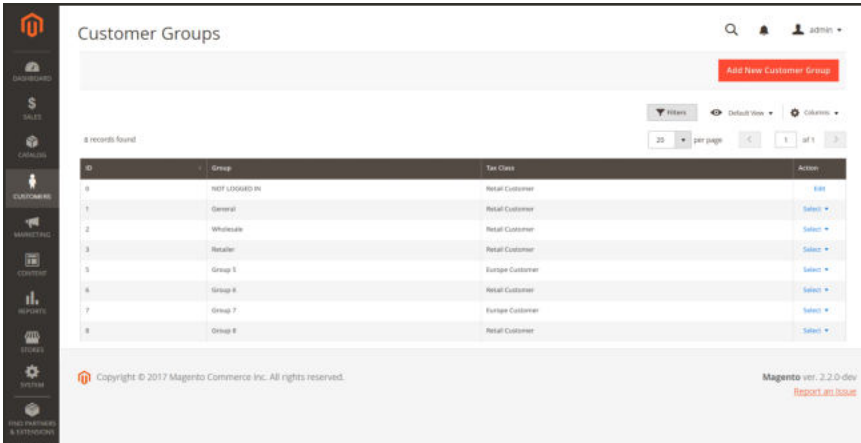
The Newsletter Subscription section of the account dashboard indicates if you are currently subscribed to the general newsletter. Customers can sign up to receive the company newsletter from the footer of the store. If the store doesn't currently publish a newsletter, it can build a subscription list for a future publication.



*Newsletter Subscription*

## CHAPTER 50: Customer Groups

Customer groups determine which discounts are available, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.



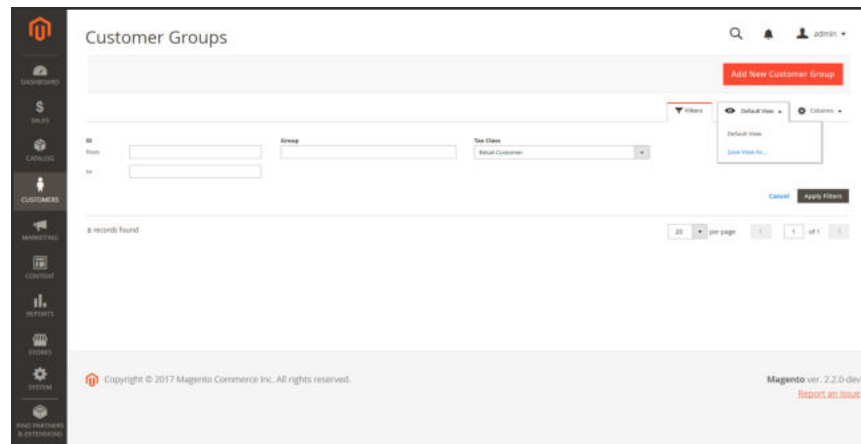
The screenshot shows the Magento Admin interface for the 'Customer Groups' page. The page title is 'Customer Groups' and it includes a search bar, a notification bell, and a user profile dropdown for 'admin'. A red button labeled 'Add New Customer Group' is visible. Below the header, there are controls for filters, default view, and columns. A table displays a list of customer groups with columns for ID, Group, Tax Class, and Action. The table contains 8 records. At the bottom of the page, there is a copyright notice for 2017 and the Magento version '2.2.0-dev'.

ID	Group	Tax Class	Action
0	NOT LOGGED IN	Retail Customer	Edit
1	General	Retail Customer	Select
2	Wholesale	Retail Customer	Select
3	Retailer	Retail Customer	Select
5	Group 5	Foreign Customer	Select
6	Group 6	Retail Customer	Select
7	Group 7	Foreign Customer	Select
8	Group 8	Retail Customer	Select

*Customer Groups*

### To filter customer groups:

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.
2. Tap **Filters**.
3. Enter criteria for searching groups, including a range of IDs, group, or tax class.

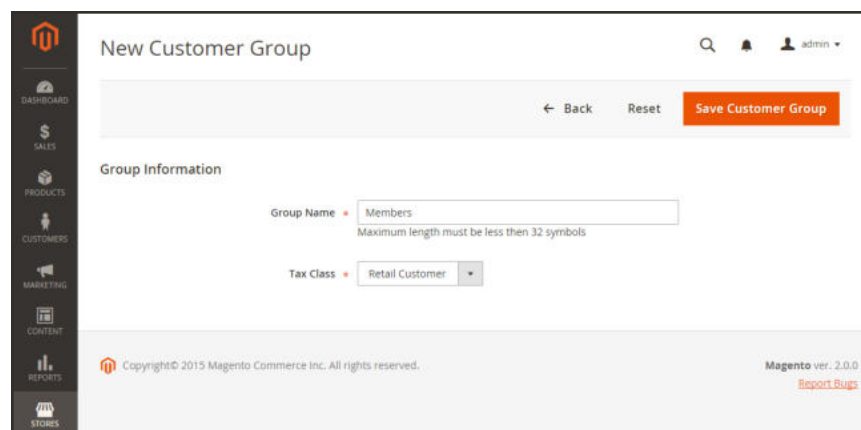


*Filtering Options*

4. When complete, tap **Apply Filters**. The subset of filtered customer groups and members displays.

### To create a customer group:

1. On the Admin sidebar, tap **Customers**. Then, choose **Customer Groups**.
2. Tap **Add New Customer Group**.
  - a. Enter a unique **Group Name** less than 32 characters to identify the group.
  - b. Select the **Tax Class** that applies to the group.



*Group Information*

3. When complete, tap **Save Customer Group**.

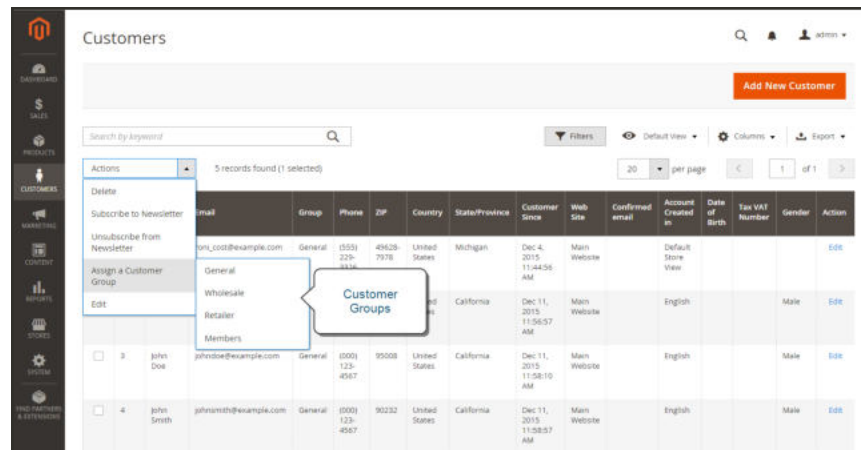
**To edit a customer group:**

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.
2. Open the record in edit mode.
3. Make the necessary changes.
4. When complete, tap **Save Customer Group**.



### To assign a customer to a different group:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the list, and mark the checkbox in the first column.
  - a. Set the **Actions** control to “Assign a Customer Group.”
  - b. Set the **Group** control to the new group.
  - c. When prompted to confirm, tap **OK**.



*Assign a Customer Group*

### To delete a customer group:

1. On the Admin sidebar, tap **Customers**. Then choose **Customer Groups**.
2. Open the record in edit mode.
3. In the button bar, tap **Delete Customer Group**.
4. When prompted to confirm, tap **OK**.
5. When complete, tap **Save Customer Group**.

# SALES

## Contents

In this section of the guide, you'll learn how to manage all aspects of the order process, including point of purchase support, order processing, payments, and fulfillment.

### Sales Menu

### Point of Purchase

#### Cart

##### Cart Configuration

###### Cart Sidebar

###### Redirect to Cart

###### Quote Lifetime

###### Minimum Order Amount

###### Allow Reorders

###### Cart Thumbnails

#### Persistent Cart

##### Persistent Cart Workflow

##### Conguring a Persistent Cart

#### Shopping Assistance

##### Creating an Order

##### Updating an Order

#### Checkout

##### Checkout Step 1

##### Checkout Step 2

##### Order Confirmation

##### Order Receipt

##### Checkout Configuration

###### Checkout Options

###### Checkout Totals Sort Order

###### Terms and Conditions

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#### Orders

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###### Order Actions

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#### Pending Payment Order Lifetime

#### Scheduled Grid Updates

### Invoices

#### Creating an Invoice

#### Printing Invoices

### Shipments

### Credit Memos

#### Product Return Workflow

#### Issuing a Credit Memo

#### Printing Credit Memos

### Billing Agreements

### Transactions

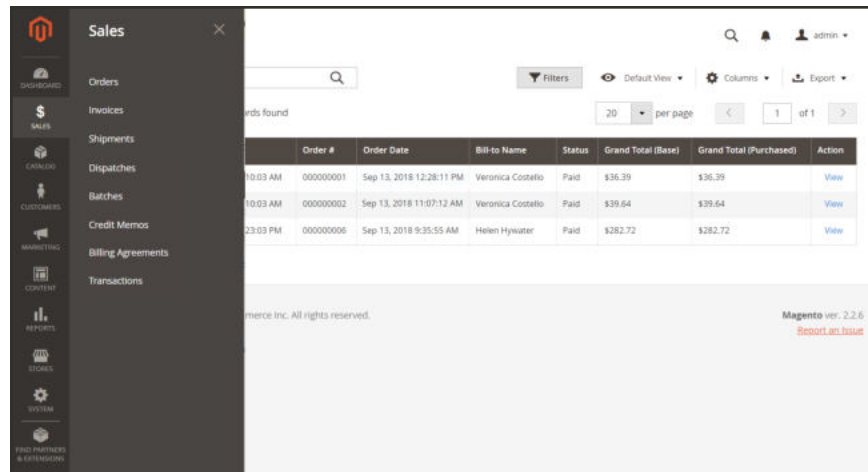
### Payments

### Shipping

## CHAPTER 51:

# Sales Menu

The Sales menu lists transactions according to where they are in the order workflow. You might think of each of option as a different stage in the lifetime of an order.



*Sales Menu*

### To display the Sales menu:

On the Admin sidebar, tap **Sales**.

## Menu Options

Order ID	Order Number	Order Date	Order Status	Order Total	Order Action
100000000	100000000	2014-12-15 10:00:00	Pending	\$10.00	View
100000001	100000001	2014-12-15 10:00:00	Pending	\$10.00	View
100000002	100000002	2014-12-15 10:00:00	Pending	\$10.00	View
100000003	100000003	2014-12-15 10:00:00	Pending	\$10.00	View
100000004	100000004	2014-12-15 10:00:00	Pending	\$10.00	View
100000005	100000005	2014-12-15 10:00:00	Pending	\$10.00	View
100000006	100000006	2014-12-15 10:00:00	Pending	\$10.00	View
100000007	100000007	2014-12-15 10:00:00	Pending	\$10.00	View
100000008	100000008	2014-12-15 10:00:00	Pending	\$10.00	View
100000009	100000009	2014-12-15 10:00:00	Pending	\$10.00	View
100000010	100000010	2014-12-15 10:00:00	Pending	\$10.00	View

### Orders

When an order is placed, a sales order is created as a temporary record of the transaction. Payment has not been processed, and the order can still be canceled.

Invoice ID	Invoice Number	Invoice Date	Invoice Status	Invoice Total	Invoice Action
100000000	100000000	2014-12-15 10:00:00	Pending	\$10.00	View
100000001	100000001	2014-12-15 10:00:00	Pending	\$10.00	View
100000002	100000002	2014-12-15 10:00:00	Pending	\$10.00	View
100000003	100000003	2014-12-15 10:00:00	Pending	\$10.00	View
100000004	100000004	2014-12-15 10:00:00	Pending	\$10.00	View
100000005	100000005	2014-12-15 10:00:00	Pending	\$10.00	View
100000006	100000006	2014-12-15 10:00:00	Pending	\$10.00	View
100000007	100000007	2014-12-15 10:00:00	Pending	\$10.00	View
100000008	100000008	2014-12-15 10:00:00	Pending	\$10.00	View
100000009	100000009	2014-12-15 10:00:00	Pending	\$10.00	View
100000010	100000010	2014-12-15 10:00:00	Pending	\$10.00	View

### Invoices

An invoice is a record of the receipt of payment for an order. Multiple invoices can be created for a single order, each with as many, or as few of the purchased products that you specify. Depending on the payment action, payment can be automatically captured when the invoice is generated.

Shipment ID	Shipment Number	Shipment Date	Shipment Status	Shipment Total	Shipment Action
100000000	100000000	2014-12-15 10:00:00	Pending	\$10.00	View
100000001	100000001	2014-12-15 10:00:00	Pending	\$10.00	View
100000002	100000002	2014-12-15 10:00:00	Pending	\$10.00	View
100000003	100000003	2014-12-15 10:00:00	Pending	\$10.00	View
100000004	100000004	2014-12-15 10:00:00	Pending	\$10.00	View
100000005	100000005	2014-12-15 10:00:00	Pending	\$10.00	View
100000006	100000006	2014-12-15 10:00:00	Pending	\$10.00	View
100000007	100000007	2014-12-15 10:00:00	Pending	\$10.00	View
100000008	100000008	2014-12-15 10:00:00	Pending	\$10.00	View
100000009	100000009	2014-12-15 10:00:00	Pending	\$10.00	View
100000010	100000010	2014-12-15 10:00:00	Pending	\$10.00	View

### Shipments

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.

Shipment ID	Shipment Number	Shipment Date	Shipment Status	Shipment Total	Shipment Action
100000000	100000000	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000001	100000001	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000002	100000002	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000003	100000003	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000004	100000004	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000005	100000005	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000006	100000006	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000007	100000007	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000008	100000008	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000009	100000009	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View
100000010	100000010	2014-12-15 10:00:00	Ready for Pickup	\$10.00	View

### Dispatches

For **Magento Shipping**, lists shipments that are ready for pickup per carrier.

Batch ID	Batch Number	Batch Date	Batch Status	Batch Total	Batch Action
100000000	100000000	2014-12-15 10:00:00	Pending	\$10.00	View
100000001	100000001	2014-12-15 10:00:00	Pending	\$10.00	View
100000002	100000002	2014-12-15 10:00:00	Pending	\$10.00	View
100000003	100000003	2014-12-15 10:00:00	Pending	\$10.00	View
100000004	100000004	2014-12-15 10:00:00	Pending	\$10.00	View
100000005	100000005	2014-12-15 10:00:00	Pending	\$10.00	View
100000006	100000006	2014-12-15 10:00:00	Pending	\$10.00	View
100000007	100000007	2014-12-15 10:00:00	Pending	\$10.00	View
100000008	100000008	2014-12-15 10:00:00	Pending	\$10.00	View
100000009	100000009	2014-12-15 10:00:00	Pending	\$10.00	View
100000010	100000010	2014-12-15 10:00:00	Pending	\$10.00	View

### Batches

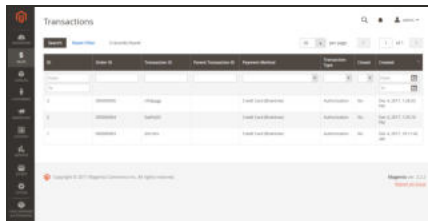
For **Magento Shipping**, create batches of shipments that can be booked together.



## Billing Agreements

---

A billing agreement is similar to a purchase order, except that it isn't limited to a single purchase. During checkout, the customer chooses Billing Agreement as the payment method. A billing agreement streamlines the checkout process because the customer doesn't have to enter payment information for each purchase.



## Transactions

---

The Transactions page lists all payment activity that has taken place between your store and all payment systems, and provides access to more detailed information.

# Point of Purchase

## Contents

Magento reduces ordering errors by automatically verifying the SKU and availability of all items before an order is submitted. In this section of the guide, you'll learn how to configure the cart and checkout options, and offer assistance to your customers.

### Instant Purchase

### Cart

#### Cart Configuration

#### Cart Sidebar

#### Redirect to Cart

#### Quote Lifetime

#### Minimum Order Amount

#### Allow Reorders

#### Cart Thumbnails

#### Persistent Cart

##### Persistent Cart Workflow

##### Configuring a Persistent Cart

### Shopping Assistance

#### Creating an Order

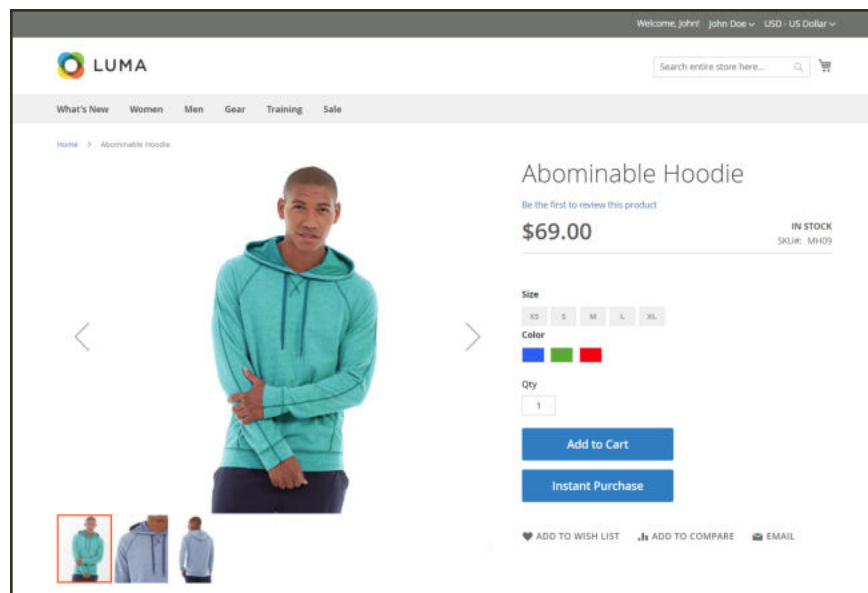
##### Updating an Order



## CHAPTER 52:

# Instant Purchase

Instant Purchase allows customers to speed through the checkout process using information that is saved in their account. When enabled, the Instant Purchase button appears below the Add to Cart button on the product page for customers who meet the requirements.



*Instant Purchase*

### Customer Requirements

- Customers are **signed in** to their accounts.
- Customer accounts have a **default billing and shipping address**.

- At least one **shipping method** is available for the country that is specified in the default shipping address.
- Customer accounts have a **stored payment** method with vault enabled. The following payment methods can be used to provide secure access to saved credit card information:

**Braintree Credit Cards\***

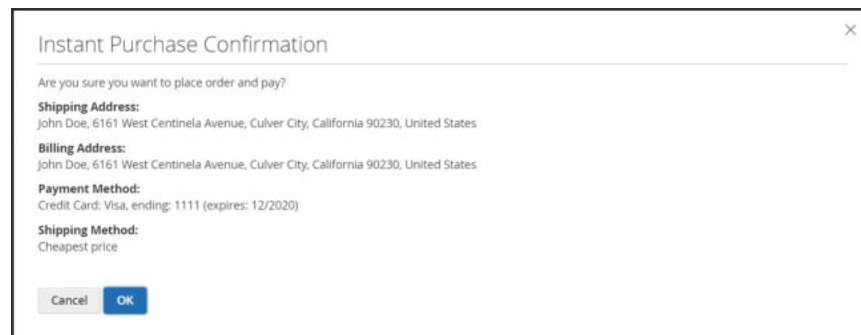
**Braintree with PayPal Enabled**

**PayPal Payflow Pro**

\*Instant Purchase cannot be used with Braintree Credit Cards if 3D Secure is enabled.

### To make an Instant Purchase:

1. In the storefront, go to the product page of the item to be purchased.
2. Select the required options, and tap **Instant Purchase**.



*Instant Purchase Confirmation*

3. Review the **Instant Purchase Confirmation** information. Then, tap **OK** to complete the transaction.

A confirmation message and order number appears at the top of the product page.

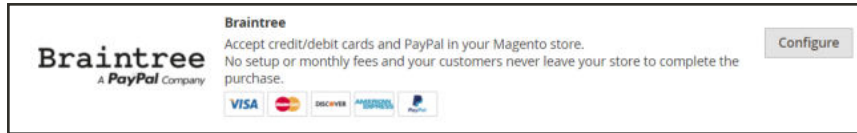
### To configure Instant Purchase:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**. Then, do the following:

#### Configure Payment Method Vault

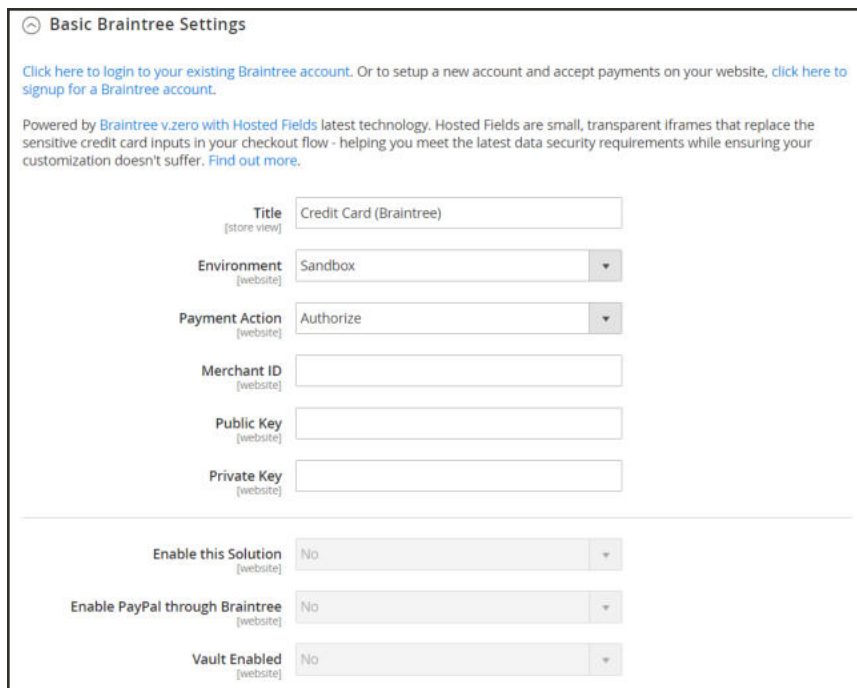
The following example shows how to configure the Braintree vault.

1. In the panel on the left, under **Sales**, choose **Payment Methods**.
2. In the **Braintree** section under Recommended Solutions, tap **Configure**. Then, do the following:



*Configure Braintree*

- a. In the **Basic Braintree Settings** section, enter the following information from your Braintree seller account:
  - Merchant ID
  - Public Key
  - Private Key
- b. Set **Enable this Solution** to “Yes.”
- c. If applicable set **Enable PayPal through Braintree** to “Yes.”
- d. Set **Vault Enabled** to “Yes.”

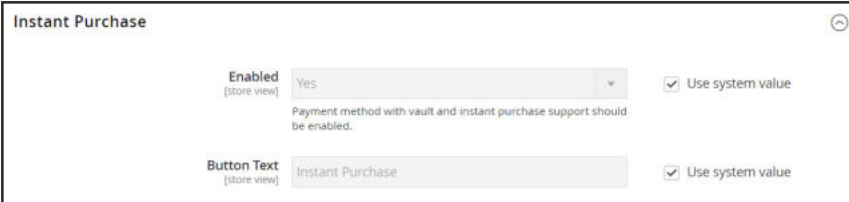


*Basic Braintree Settings*

**Enable Instant Purchase**

- 1. In the panel on the left, under **Sales**, choose **Sales**.
- 2. Expand ☺ the **Instant Purchase** section, and do the following:
  - a. Set **Enabled** to “Yes.”
  - b. Enter the **Button Text** that you want to appear on the button.

The button text can be changed for each store view, or language. By default, the button text is “Instant Purchase.”



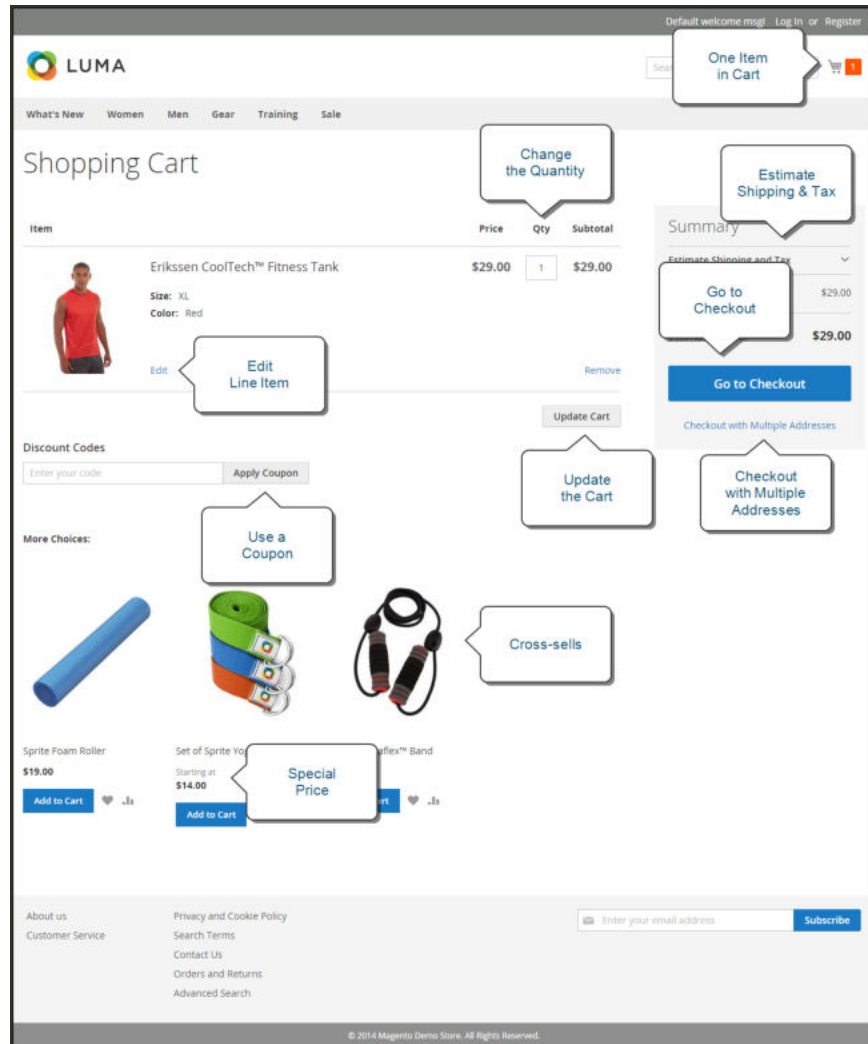
The screenshot shows the 'Instant Purchase' configuration panel. It has a title 'Instant Purchase' and a close button in the top right. There are two main sections: 'Enabled' and 'Button Text'. The 'Enabled' section has a dropdown menu set to 'Yes', a checkbox for 'Use system value' which is checked, and a warning message: 'Payment method with vault and instant purchase support should be enabled.' The 'Button Text' section has a text input field containing 'Instant Purchase' and a checked 'Use system value' checkbox.

*Instant Purchase*

2. When complete, tap **Save Config**.
3. In the message at the top of the page, click **Cache Management**. Then in the upper-right corner, tap **Flush Magento Cache**.

## CHAPTER 53: Shopping Cart

The cart is positioned at the end of the path to purchase, at the intersection of “Buy” and “Abandon,” and is perhaps, the most important page in the store. The cart is where the order total is calculated, along with discount coupons and estimated shipping and tax. It’s a great place to show your trust badges and seals, and an ideal opportunity to offer one last item. You can choose the items to be offered as a cross-sell impulse purchase whenever a specific item appears in the cart.



*Shopping Cart*

## Cart Configuration

The cart configuration determines when the customer is redirected to the cart page, and which images are used for product thumbnails. You can require an order to reach a minimum amount before the checkout process begins, specify the number of days quoted prices remain valid, and specify the order of items in the Totals section.

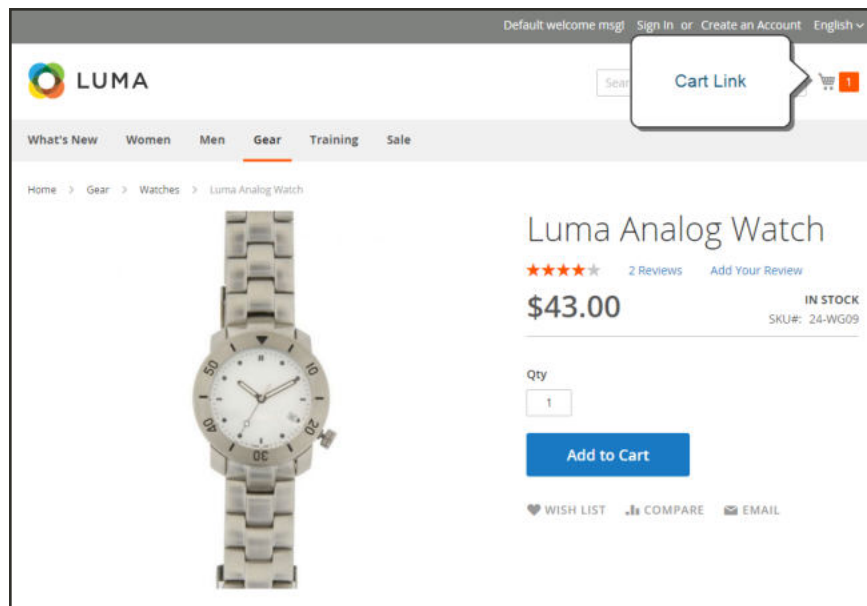
- [My Cart Link](#)
- [Cart Sidebar](#)
- [Redirect to Cart](#)
- [Quote Lifetime](#)
- [Minimum Order Amount](#)
- [Cart Thumbnails](#)

**See also:**

[Checkout Configuration](#)

## My Cart Link

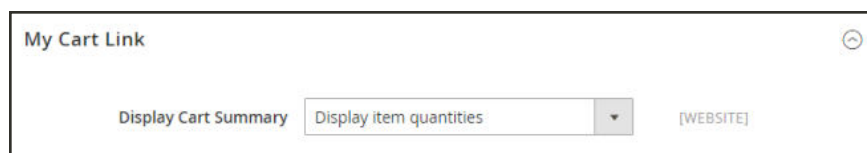
The cart link in the upper-right corner of the header gives a quick summary of the contents of the cart. The link can be configured to display the number of different products (or SKUs) in the cart, or the total quantity of all items. If the [Shopping Cart Sidebar](#) is enabled, you can click the link to display more detail.



*Cart Link*

### To configure the cart link:

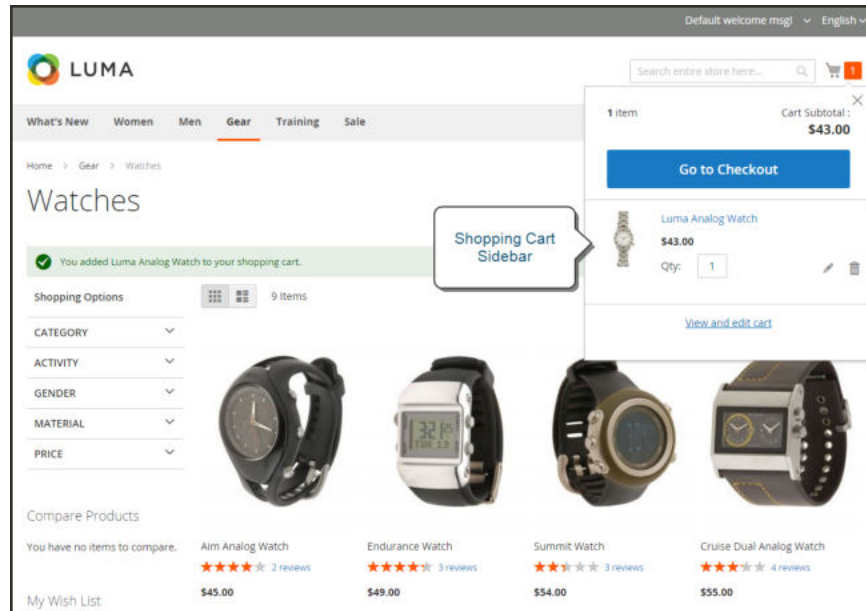
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☺ the **My Cart Link** section.
4. Set **Display Cart Summary** to one of the following:
  - Display item quantities
  - Display number of items (different products) in cart.
5. When complete, tap **Save Config.**



*My Cart Link*

## Cart Sidebar

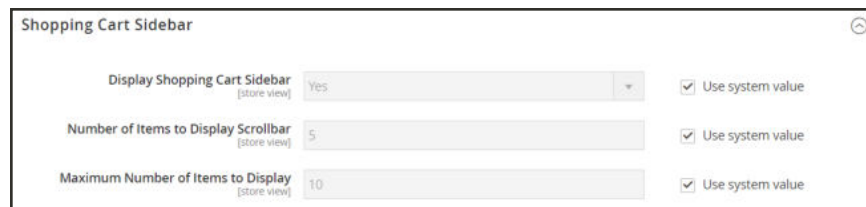
The Cart Sidebar is often called the “mini cart,” and displays a summary of the items in the cart. It is enabled by default, and appears when you click the number of items in the Cart Link.



*Shopping Cart Sidebar*

### To configure the mini cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart Sidebar** section. Then, do the following:



*Shopping Cart Sidebar*

- a. Set **Display Shopping Cart Sidebar** to your preference.
  - b. In the **Maximum Display Recently Added Item(s)** field, enter the maximum number of recently added items that you want to appear in the mini cart.
4. When complete, tap **Save Config.**



## Redirect to Cart

The shopping cart page can be configured to appear whenever an item is added to the cart, or only when customers choose to go to the page. The basic information about the items currently in the cart is always available in the **mini cart**. The decision is a matter of balancing the benefits letting customers continue shopping, with the benefit of encouraging customers to proceed to checkout. It might be simply a matter of personal preference. However, if you want back it up with numbers, you can run an A/B test to see which approach produces a higher conversion rate.

### To configure when the cart appears:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart** section.
4. Set **After Adding a Product Redirect to Shopping Cart** to your preference.
5. Tap **Save Config**.

Setting	Value	Use system value
Quote Lifetime (days) [website]	30	<input checked="" type="checkbox"/>
After Adding a Product Redirect to Shopping Cart [store view]	No	<input checked="" type="checkbox"/>
Number of Items to Display Pager [store view]	20	<input checked="" type="checkbox"/>
Show Cross-sell Items in the Shopping Cart [store view]	Yes	<input checked="" type="checkbox"/>
Grouped Product Image [store view]	Product Thumbnail Itself	<input checked="" type="checkbox"/>
Configurable Product Image [store view]	Parent Product Thumbnail	<input checked="" type="checkbox"/>

*Redirect to Cart*

## Quote Lifetime

You can determine how long a price is valid by setting the cart quote lifetime in the configuration. For example, if a shopper leaves a cart unattended after several days, the quotes price for some items might no longer be the same. By default, the quote lifetime is set to thirty days.

### To configure the quote lifetime:

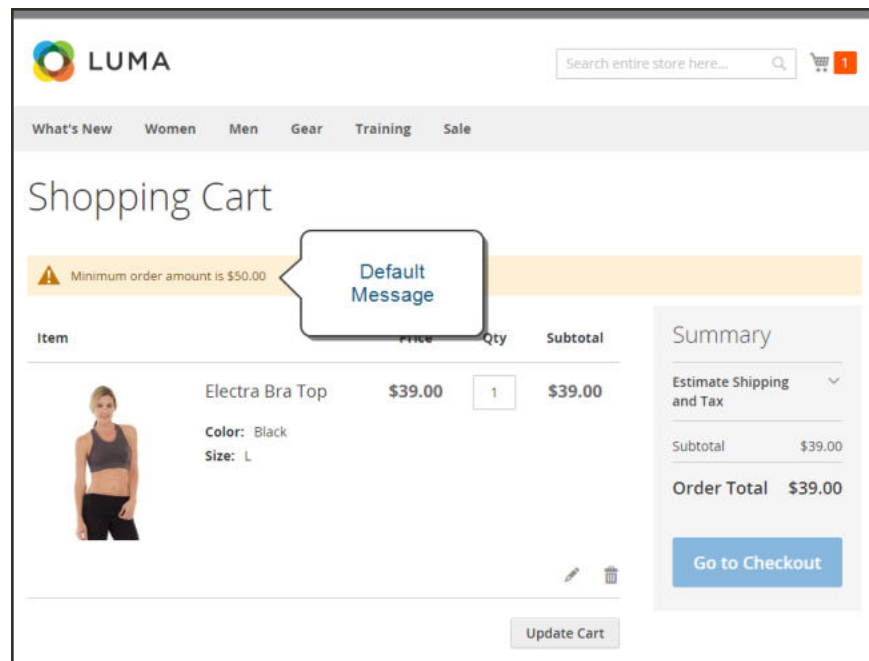
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☺ the **Shopping Cart** section.
4. In the **Quote Lifetime (days)** field, enter the number of days that a quoted price remains valid.
5. When complete, tap **Save Config**.

Setting	Value	Use system value
Quote Lifetime (days)	30	<input checked="" type="checkbox"/>
After Adding a Product Redirect to Shopping Cart	No	<input checked="" type="checkbox"/>
Number of Items to Display Pager	20	<input checked="" type="checkbox"/>
Show Cross-sell Items in the Shopping Cart	Yes	<input checked="" type="checkbox"/>
Grouped Product Image	Product Thumbnail Itself	<input checked="" type="checkbox"/>
Configurable Product Image	Parent Product Thumbnail	<input checked="" type="checkbox"/>

*Shopping Cart*

## Minimum Order Amount

The configuration allows you to specify a minimum amount, after discounts are applied, that order subtotals are required to meet. Orders shipped to multiple address can be required to meet the minimum order amount per address. The Checkout button becomes available only after the minimum order amount is reached.



*Minimum Order Message in Cart*

### To configure a minimum order amount:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand the **Minimum Order Amount** section. Then, do the following:

**Minimum Order Amount** ⊞

**Enable**  [WEBSITE]

**Minimum Amount**  [WEBSITE]  
Subtotal after discount

**Include Tax to Amount**  [WEBSITE]

**Description Message**  [STORE VIEW]  
This message will be shown in the shopping cart when the subtotal (after discount) is lower than the minimum allowed amount.

**Error to Show in Shopping Cart**  [STORE VIEW]

**Validate Each Address Separately in Multi-address Checkout**  [WEBSITE]

**Multi-address Description Message**  [STORE VIEW]  
We'll use the default description above if you leave this empty.

**Multi-address Error to Show in Shopping Cart**  [STORE VIEW]  
We'll use the default error above if you leave this empty.

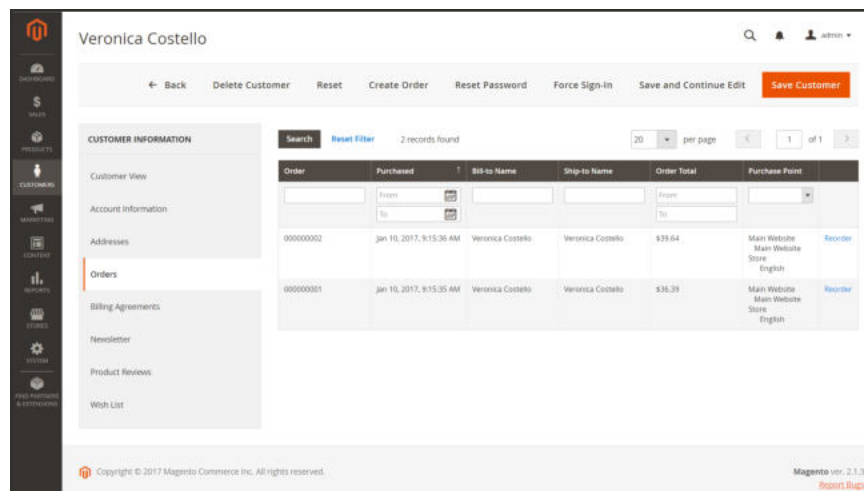
*Minimum Order Amount*

- a.** To require a minimum order amount, set **Enable** to “Yes.”
- b.** Enter the **Minimum Amount** that is required for the subtotal, after discounts are applied.
- c.** Set **Include Tax to Amount** to one of the following:
  - Yes      Requires the subtotal to meet the minimum amount with tax included.
  - No        Requires the subtotal to meet the minimum amount without tax.
- d.** To change the default message that appears at the top of the cart when the subtotal doesn’t meet the minimum amount, enter the text in the **Description Message** box. Leave the box blank to use the default message.
- e.** To change the default error message, enter the text in the **Error to Show in Shopping Cart** box.




## Allow Reorders

When enabled, reorders can be made directly from the customer account or from the original order in the Admin. Reorders are enabled by default.



*Customer Reorder Link in Admin*

### To configure customer reorders:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand  the **Reorder** section.



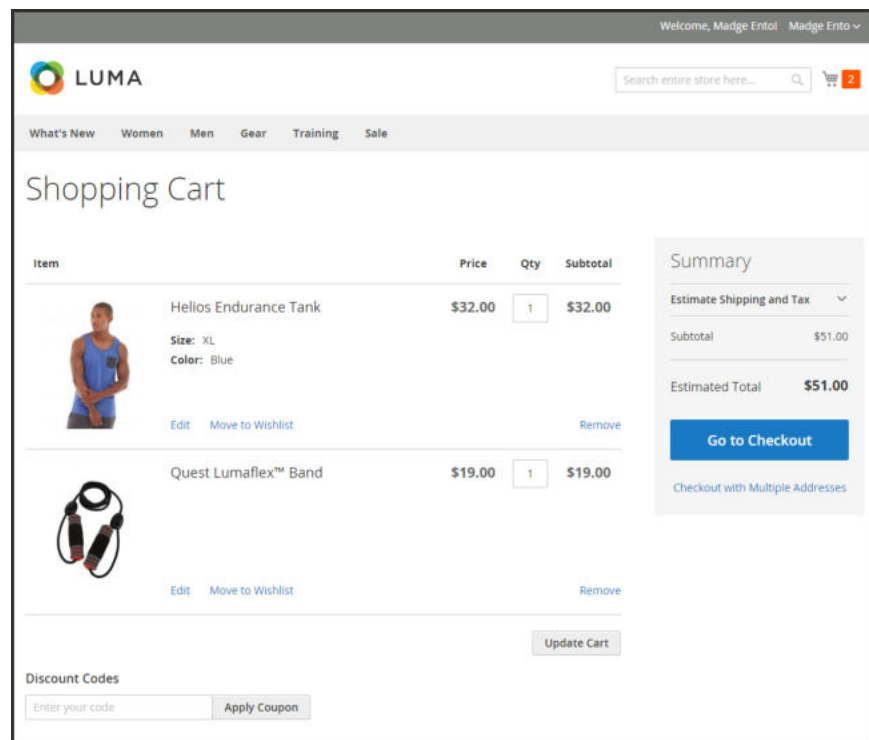
*Reorder*

4. Set **Allow Reorder** to your preference.

## Cart Thumbnails


The thumbnail images in the cart give customers a quick overview of the items they are about to purchase. However, for products with multiple options, the image might not match the variation of the product that is in the cart. If the customer purchases an item in a specific color, ideally, the thumbnail in the cart should match.

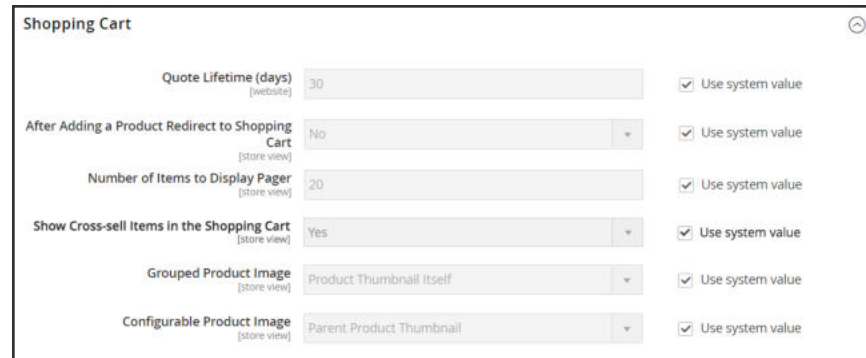
The thumbnail image for both grouped and configurable products can be set to display the image from either the “parent” product or from the product variation. The setting applies to all grouped or configurable products in the current store view.



*Thumbnail Images in Cart*

### To configure cart thumbnails:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand  the **Shopping Cart** section. Then, do the following:



Setting	Value	Use system value
Quote Lifetime (days) <small>[website]</small>	30	<input checked="" type="checkbox"/>
After Adding a Product Redirect to Shopping Cart <small>[store view]</small>	No	<input checked="" type="checkbox"/>
Number of Items to Display Pager <small>[store view]</small>	20	<input checked="" type="checkbox"/>
Show Cross-sell Items in the Shopping Cart <small>[store view]</small>	Yes	<input checked="" type="checkbox"/>
Grouped Product Image <small>[store view]</small>	Product Thumbnail Itself	<input checked="" type="checkbox"/>
Configurable Product Image <small>[store view]</small>	Parent Product Thumbnail	<input checked="" type="checkbox"/>

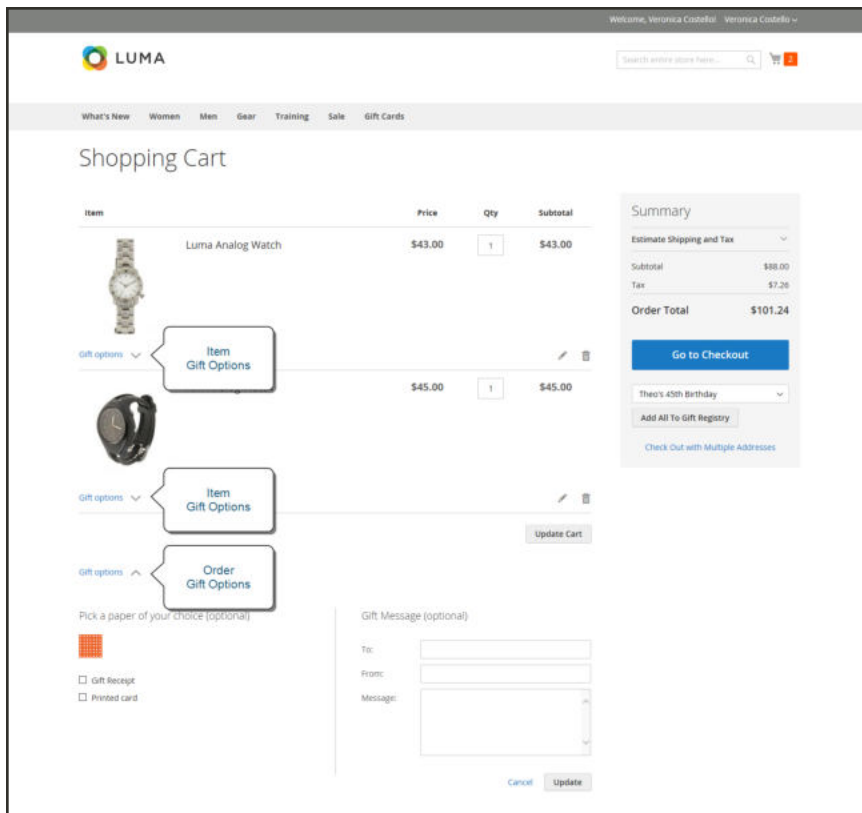
### *Shopping Cart*

- a. Set **Grouped Product Image** to one of the following:
  - Product Thumbnail Itself
  - Parent Product Thumbnail
- b. Set **Configurable Product Image** to one of the following:
  - Product Thumbnail Itself
  - Parent Product Thumbnail
4. When complete, tap **Save Config**.

## Gift Options


The selection of available gift options appears in the cart before the checkout process begins. The Gift Options configuration determines if customers can add a gift message. Each item in the order can have a separate message. The Gift Options configuration applies to the entire website, but can be overridden at the product level.

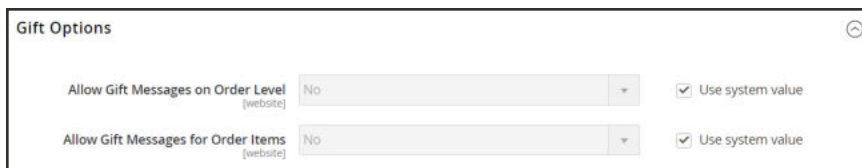




*Gift Options in Shopping Cart*

**To enable gift options:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**. Then, expand  the **Gift Options** section.



*Gift Options*

3. Set the **Gift Message** options according to your preference:
  - Allow Gift Messages on Order Level
  - Allow Gift Messages for Order Items
4. When complete, tap **Save Config.**

## Persistent Cart

A persistent shopping cart keeps track of unpurchased items which are left in the cart, and saves the information for the customer's next visit. Customers who are "remembered" can have the contents of their shopping carts restored the next time they visit your store.

Using a persistent shopping cart can help reduce the number of abandoned shopping carts and increase sales. It is important to understand that the persistent shopping cart does not expose sensitive account information at any time. While the persistent shopping cart is use, both registered customers and guest shoppers are required to either log in to an existing account, or create a new account before going through checkout. For guest shoppers, a persistent shopping cart is the only way to retrieve information from a previous session.

To use the persistent shopping cart, the customer's browser must be set to allow cookies. During operation, the following cookies are used:



### Session Cookie

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A short-term session cookie exists for the duration of a single visit to your site, and expires when the customer leaves, or after a set period of time.



### Persistent Cookie

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A long-term persistent cookie continues in existence after the end of the session, and saves a record of the customers' shopping contents for future reference.

When using a persistent cart, it is recommended that you set the lifetime of the server session and the session cookie to a long period of time. To learn more, see: [Customer Session Lifetime](#).

## Persistent Cart Workflow

When Persistent Shopping Cart is enabled, the workflow depends on the values of the “Enable Remember Me” and “Clear Persistence on Log Out” settings, the customer’s decision to select or clear the “Remember Me” checkbox, and when the persistent cookie is cleared.

When a persistent cookie is applied, a Not %Jane Smith%? link appears in the page header, to give the customer the ability to terminate the persistent session and start working as a guest, or log in as a different customer. The system retains a record of the shopping cart contents, even if the customer later uses different devices to shop in your store. For example, a customer can add an item to the shopping cart from a laptop, edit the cart contents from a desktop computer, add more items from a mobile device, and complete the checkout process from a tablet.

There is a separate independent persistent cookie for each browser. If the customer uses multiple browsers while visiting your store during a single, persistent session, any changes made in one browser will be reflected in any other browser when the page is refreshed. While the persistent shopping cart is enabled, your store creates and maintains a separate persistent cookie for each browser that is used by a customer to log in or create an account.

### **An Open Session on a Shared Computer**

Jane is finishing up her holiday shopping with a persistent session, and adds a present for John to her cart, as well as something for her mother. Then she goes to the kitchen for some milk and cookies.

John sits down at the computer to do some quick shopping while Jane’s in the kitchen. Without noticing the “Not %Jane%” link at the top of the page, he finds a nice present for Jane and adds it to the cart. When he goes to checkout and logs in as himself, both the items in Jane’s cart are added to his cart. John’s in such a hurry that he doesn’t notice the additional item during Order Review, and submits the order. Jane’s cart is now empty, and John bought presents for both Jane and her mother.

Jane brings John some milk and cookies, and asks, “What’s up?” He says, “Oh, nothing.”

### Remember Me

Customers can click the “Remember Me” checkbox on the Login page to save the contents of the their shopping carts.



**Yes** A persistent cookie is created, and the contents of the shopping cart is saved for the customer’s next logged-in session.



**No** If “Remember Me” is not selected or is cleared, a persistent cookie is not created, and the cart information is not saved for the customer’s next logged-in session.

### Continue Persistence on Logout (No)



**No** When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.



**No** When the customer logs out, the session cookie is deleted, but the persistent cookie remains in effect. The next time the customer logs in, the cart items are restored, or added to any new items that have been placed in the cart.



**No** If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

### Clear Persistence on Logout (Yes)



**Yes** When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.



**Yes** When the customer logs out, both cookies are deleted.



**Yes** If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

## Persistent Cart Settings and Effects

SETTINGS	EFFECT
Enable Remember Me = "No" Clear Persistence on Log Out = any value	The Remember Me checkbox is not available on the login and registration page. The persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = any value Remember Me (not selected)	The session cookie is applied as usual; the persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "Yes" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, both cookies are deleted. If a customer does not log in, but the session cookie expires, the persistent cookie is still used. Apart from logging out, the persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "No" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, the session cookie is deleted, the persistent session continues. The persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.

## Configuring a Persistent Cart

During the setup of a persistent shopping cart, you can specify the lifetime of the cookies, and which options you want to make available for various customer activities.

If the session cookie expires while the customer is logged in, the persistent cookie remains active.

### To configure a persistent cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Persistent Shopping Cart**.
3. If necessary, expand ☺ the **General Options** section.
4. To enable the persistent shopping cart and display additional options, set **Enable Persistence** to “Yes.” Then, do the following:

Setting	Value	Use system value
Enable Persistence [website]	Yes	<input type="checkbox"/>
Persistence Lifetime (seconds) [website]	31536000	<input checked="" type="checkbox"/>
Enable "Remember Me" [website]	Yes	<input checked="" type="checkbox"/>
"Remember Me" Default Value [website]	Yes	<input checked="" type="checkbox"/>
Clear Persistence on Sign Out [website]	Yes	<input checked="" type="checkbox"/>
Persist Shopping Cart [website]	Yes	<input checked="" type="checkbox"/>

### *General Options*

- a. In the **Persistence Lifetime (seconds)** field, enter the length of time, in seconds, that you want the persistent cookie to last. The default value of 31,536,000 seconds is equal to one year, and is the maximum time allowed.
- b. Set **Enable “Remember Me”** to one of the following:
 

Yes	Displays the “Remember Me” checkbox on the Login page of your store, so customers can choose to save their shopping cart information.
No	Persistence can still be enabled, but customers are not given the option to choose if they want to save their information.
- c. To preselect the “Remember Me” checkbox, set **Remember Me Default Value** to “Yes.”
- d. Set **Clear Persistence on Log Out** to one of the following:

- Yes      The shopping cart is cleared when a registered customer logs out.
- No      The shopping cart is saved when a registered customer logs out.

If the session cookie expires while the customer is still logged in, the persistent cookie remains in use.

**e.** Set **Persist Shopping Cart** to one of the following:

- Yes      If the session cookie expires, the persistent cookie is preserved. If a guest shopper later logs in or creates a new account, the shopping cart is restored.
- No      The shopping cart is not preserved for guests after the session cookie expires.

**5.** When complete, tap **Save Config.**



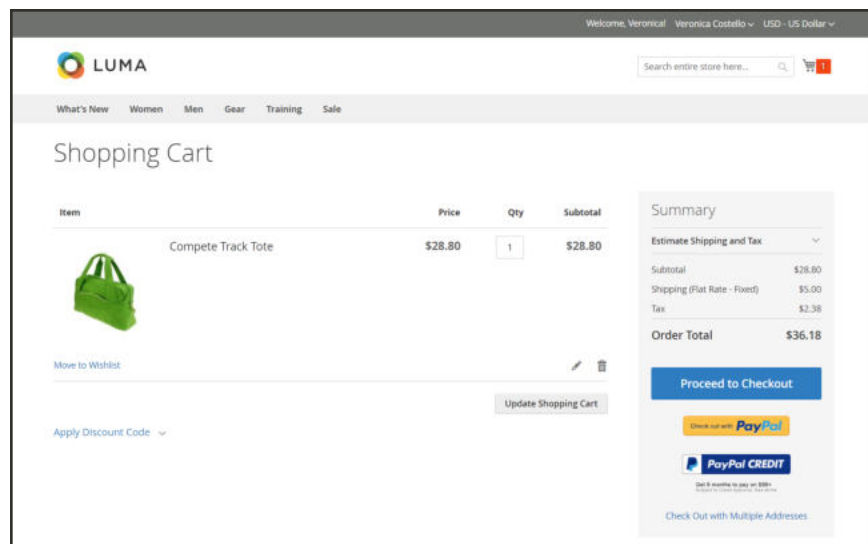


## CHAPTER 54:

# Shopping Assistance

Customers sometimes need assistance to complete a purchase. Some customers like to shop online, but would rather the order by phone. You can offer immediate assistance both guests and customers who have registered for an account with your store.

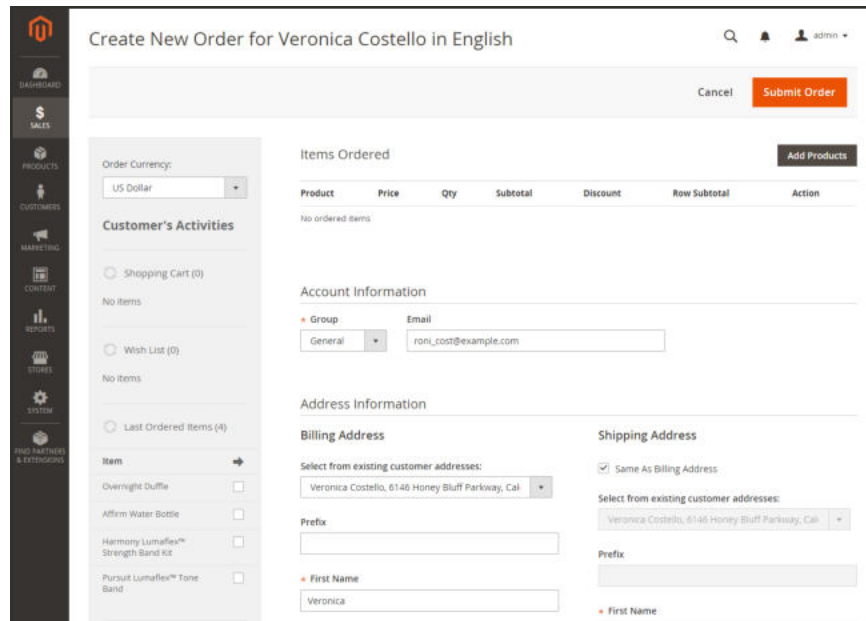
- [Creating Customer Accounts](#)
- [Creating Orders](#)



*Shopping Cart*

## Creating an Order

For registered customers who need assistance, you can create an entire order directly from the Admin. The Create New Order form includes all the information that is needed to complete the normal checkout process, with activity summaries from the customer’s account dashboard.



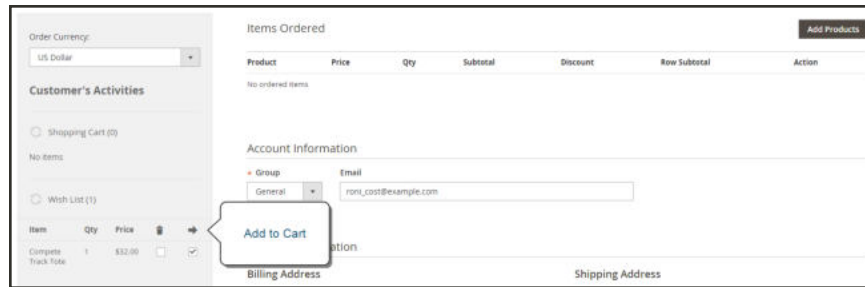
*Create New Order*

### To create a new order:

1. On the Admin sidebar, tap **Customers**.
2. Find the customer in the grid. Then in the **Action** column, click **Edit**.
3. In the workspace header, tap **Create Order**.

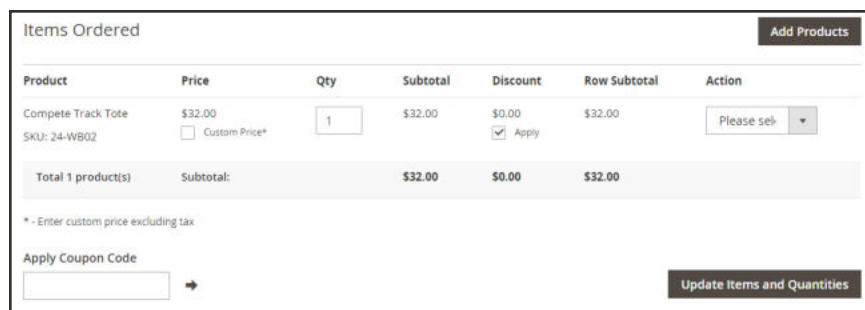


4. If your store has multiple views, choose the store view where the order is to be placed. .
5. To add products from the **Customer’s Activities**, mark the checkbox of each product in the panel on the left. Then, scroll down and tap **Update Changes** . The item appears in the order form.



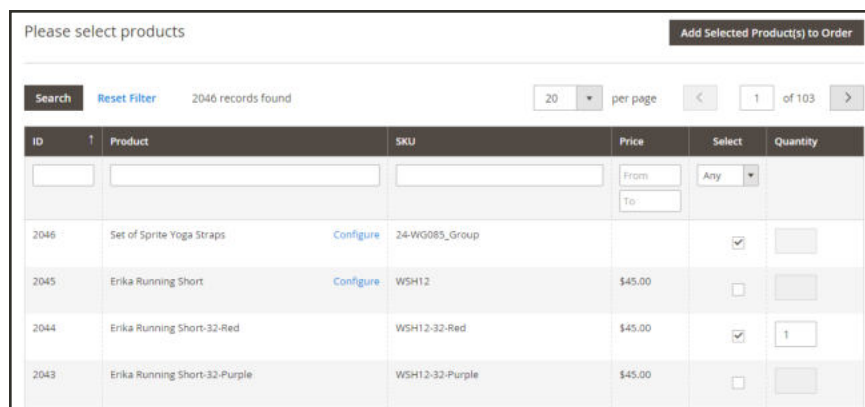
*Add to Cart*

6. To add products from the catalog, tap **Add Products**. Then, do the following:



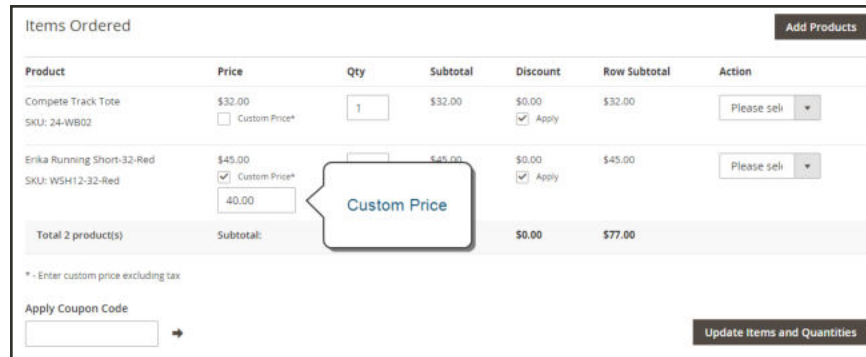
*Add Products*

- a. In the grid, mark the checkbox of each product to be added to the cart, and enter the **Qty** to be purchased.



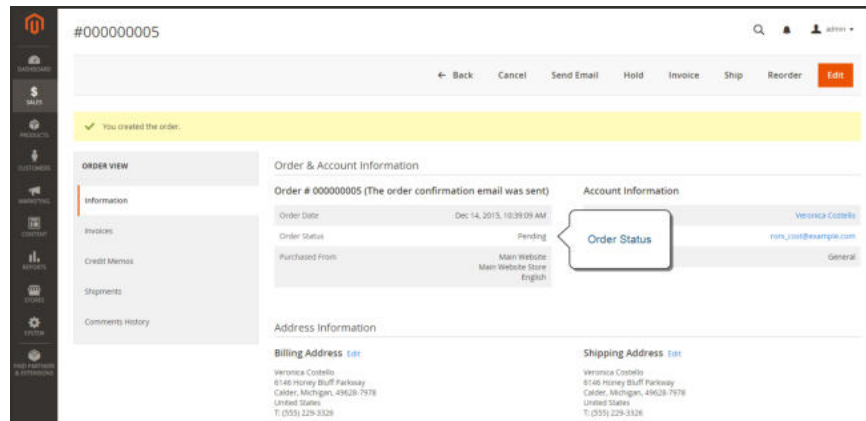
*Select Products*

- b. If the product has multiple options, tap **Configure**. Complete the options as needed, and tap **OK**. Then, click the **Add Selected Product(s) to Order** link to update the cart.
- c. To override the price of an item, mark the **Custom Price** checkbox. Then, enter the new price in the box below. To update the cart totals, tap **Update Items and Quantities**.



Custom Price

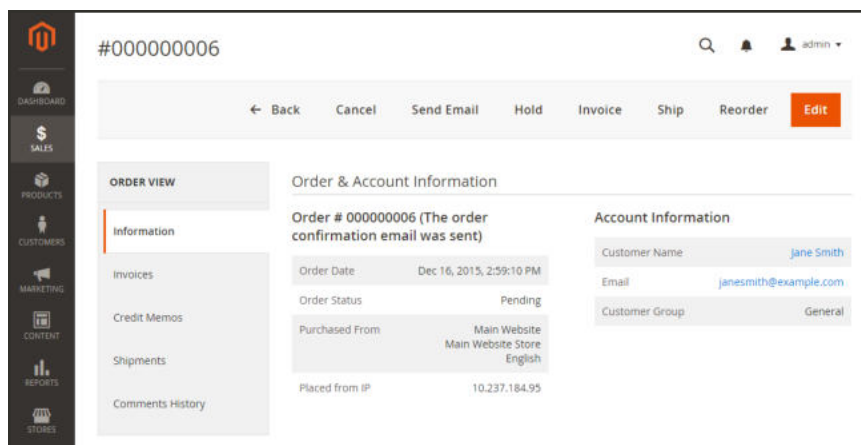
- d. Complete the following sections as needed for the order:
    - Apply Coupon Codes
    - Payment Method
    - Shipping Method
    - Order Comments
7. When complete, tap **Submit Order**. A confirmation is sent to the customer, and the customer can view the order details from their account.



Order Created

## Updating an Order

After a customer places an order, it is sometimes necessary to edit the order, place it on hold, or cancel it entirely. When you change an order, the original order is canceled and a new order is generated. You can, however, change the billing or shipping address without generating a new order.



*Edit Order*

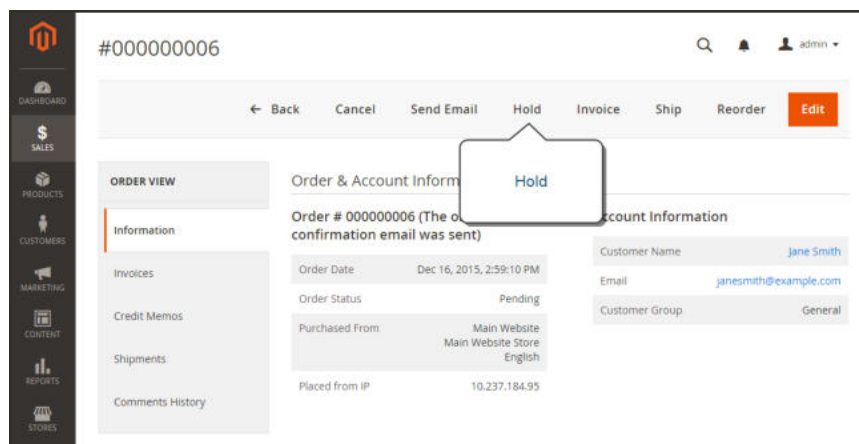
### To edit an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order to be edited. Then in the **Action** column, click the **View** link.
3. Tap **Edit**. When prompted to confirm, tap **OK** to continue.
4. Make the necessary changes to the order.
5. When complete, do one of the following:
  - To save changes made to the billing or shipping address, tap **Save**.
  - To save changes made to line items, and reprocess the order, tap **Submit Order**.

### To place an order on hold:

If the customer's preferred method of payment is not available, or if the item is temporarily out of stock, you can put the order on hold.

1. In the Orders grid, find the pending order that you want to place on hold.
2. In the **Action** column, click the **View** link.
3. Tap **Hold** to place the order on hold.



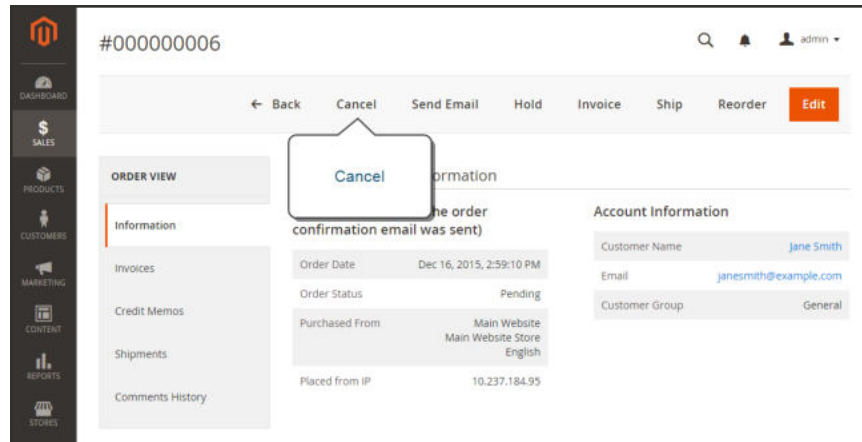
*Hold Order*

4. When you are ready to return the order to an active state, repeat the process and tap **Unhold**.

### To cancel an order:

Canceling an order changes its status from “Pending” to “Canceled.”

1. In the Orders grid, find the pending order to be canceled.
2. In the **Action** column, click the **View** link.
3. Tap **Cancel**.



*Cancel Order*

The status of the order is now “Canceled.”





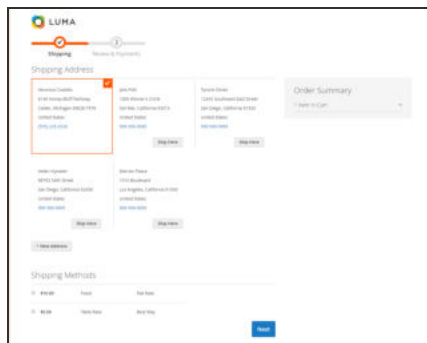
## CHAPTER 55:

# Checkout

When the checkout process begins, the transaction shifts to a secure, encrypted channel. A padlock symbol appears in the address bar of the browser, and the URL changes from “http” to “https”.

From this point on, the goal is to gather the information necessary to complete the transaction. The Checkout page leads the customer through each step of the process. Customers who are logged into their accounts can complete checkout quickly, because much of the information is already in their accounts.

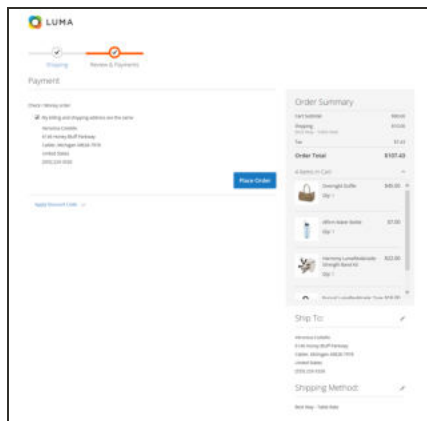
## Checkout Steps



### Step 1: Shipping

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The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method.



### Step 2: Review & Payments

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During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase.

The **order confirmation** appears after the order is placed. For registered customers, the page includes the order number with a link to the customer’s account, and a link to generate a receipt.

## Checkout Step 1: Shipping

The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method. If the customer has an account, the shipping address is entered automatically, but can be changed if needed.

The progress bar at the top of the page follows each step of the checkout process, and the Order Summary shows the information entered so far.

*Checkout Step 1: Shipping*

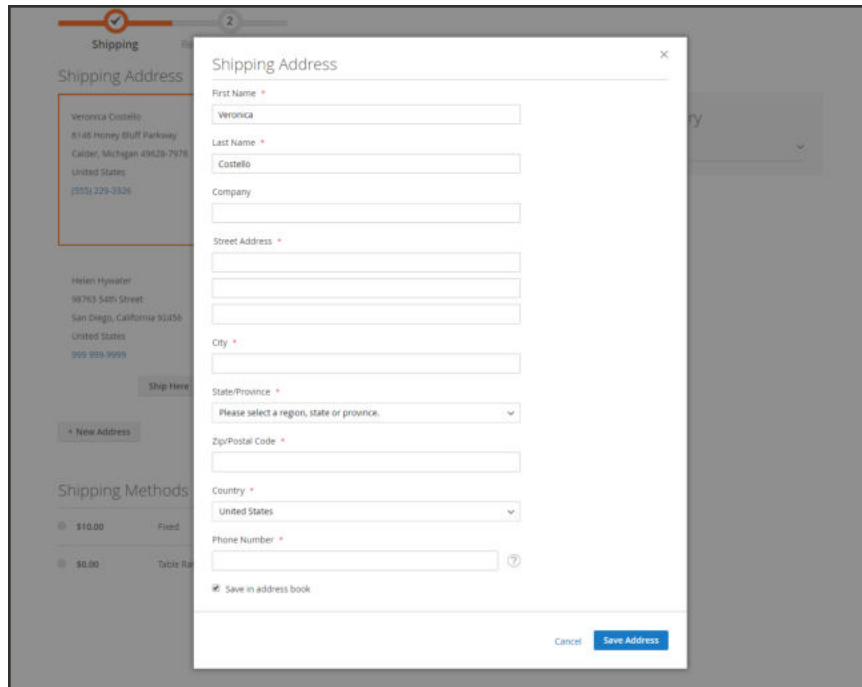
### To ship to a different address:

1. If there are additional entries in the address book, find the address where the order is to be shipped.
2. Tap **Ship Here** to select the address.

### To add a new address:

1. At the bottom of the **Shipping Address** section, tap **+ New Address**.
2. Complete the **Shipping Address** form.

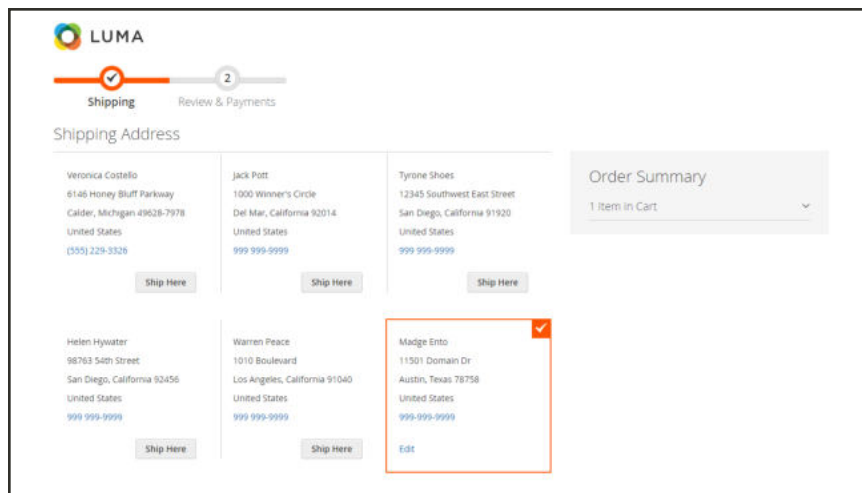
By default, the customer's first and last names initially appear in the form.



*Shipping Address*

- 3. To save the new address in the address book, mark the checkbox at the bottom of the form.
- 4. When complete, tap **Save Address**.

The new address is now selected as the shipping address.



*New Shipping Address Selected*

### To choose the shipping method:

1. In the list of **shipping** methods, choose the option that you want to use.

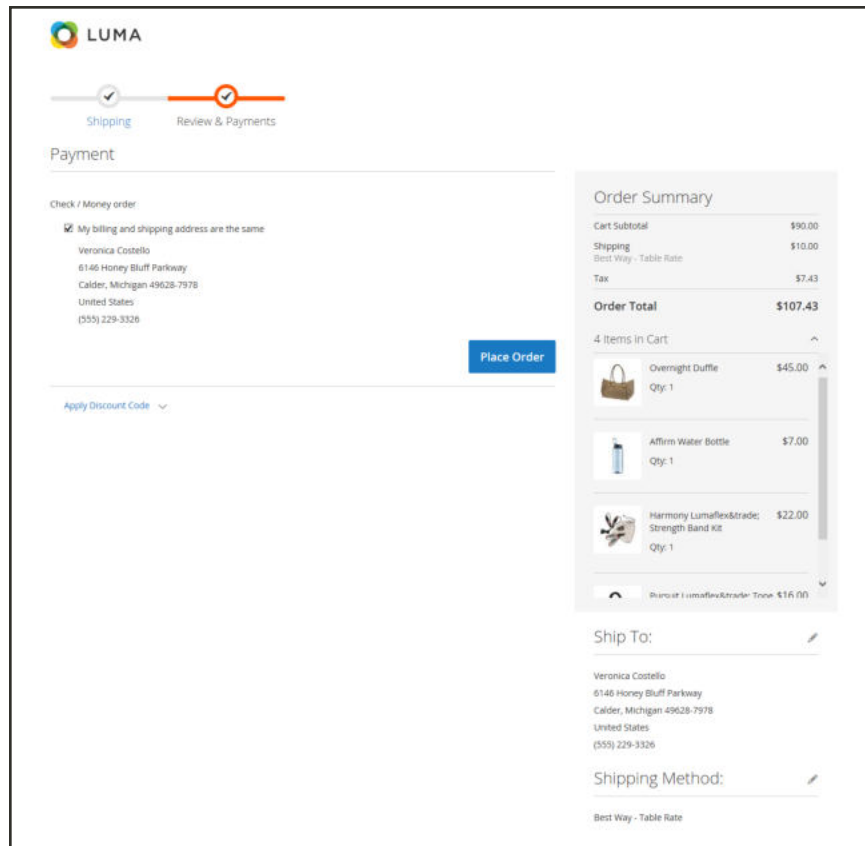


### *Shipping Methods*

2. Tap **Next** to continue.

## Checkout Step 2: Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase. All information can be reviewed, and edited if needed. If enabled, the customer must to agree to the terms and conditions of the sale before placing the order.

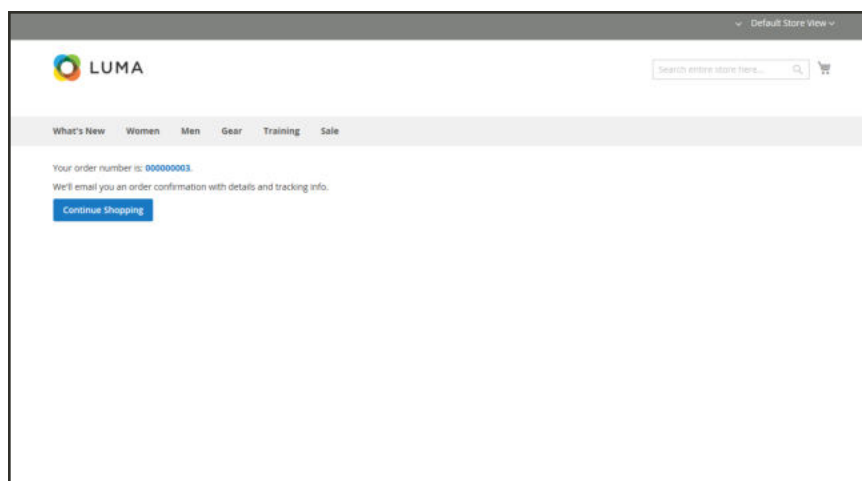


*Review & Payments*

## Order Confirmation

The order confirmation appears after the order is placed. For registered customers, the page includes the order number with a link to the customer's account, and a link to generate a receipt. Registered customers are told that they will receive order confirmation and tracking info by email. Guests are encouraged to create an account to track the order. Registered customers can generate a receipt by clicking a link.

The order confirmation page is also called the "Success" page, and is used by analytics programs to track conversions.



*Order Confirmation*

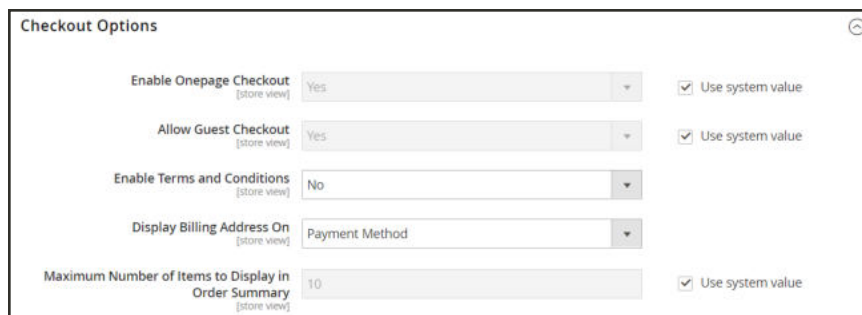
## Checkout Configuration

The checkout configuration determines the format of the page, the requirements to make a purchase, and the options that are presented during the checkout process.

- [Guest Checkout](#)
- [Terms and Conditions](#)
- [One Page Checkout](#)
- [Gift Options](#)
- [Checkout Totals Sort Order](#)

## Checkout Options

The checkout configuration determines the layout of the checkout page, and if shoppers must register for an account and agree to the terms and conditions of the sale before making a purchase.



The screenshot shows the 'Checkout Options' configuration panel. It contains five settings:

- Enable Onepage Checkout** (store view): Set to 'Yes'. A checkbox 'Use system value' is checked.
- Allow Guest Checkout** (store view): Set to 'Yes'. A checkbox 'Use system value' is checked.
- Enable Terms and Conditions** (store view): Set to 'No'.
- Display Billing Address On** (store view): Set to 'Payment Method'.
- Maximum Number of Items to Display in Order Summary** (store view): Set to '10'. A checkbox 'Use system value' is checked.

*Checkout Options*

### To change the checkout options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☺ the **Checkout Options** section.
4. Set the following to your preference:
  - Enable **Onepage Checkout**
  - Allow **Guest Checkout**
  - Enable **Terms and Conditions**
5. When complete, tap **Save Config**.



## Guest Checkout

Your store can be configured to require shoppers to open an account before making a purchase. The default setting allows guests to make purchases, with an option to register for an account after they complete the checkout process.

The screenshot shows the LUMA checkout interface. At the top left is the LUMA logo. Below it is a 'Checkout Method' section with two options: 'Check Out as a Guest' (selected) and 'Login'. The 'Check Out as a Guest' option has a blue 'Continue' button. The 'Login' section includes the text 'Already registered? Please sign in below:' followed by 'Email \*' and 'Password \*' input fields, a blue 'Login' button, and a 'Forgot Your Password?' link. A red asterisk indicates required fields.

*Checkout as Guest*

### To change the guest checkout setting:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand ☺ the **Checkout Options** section.
4. If necessary, clear the **Use system value** checkbox. Then, do the following:
  - a. If applicable, choose the store view where the configuration applies.
  - b. When prompted, tap **OK** to continue.
5. Set **Allow Guest Checkout** to your preference:

The screenshot shows the 'Checkout Options' configuration panel. It contains the following settings:

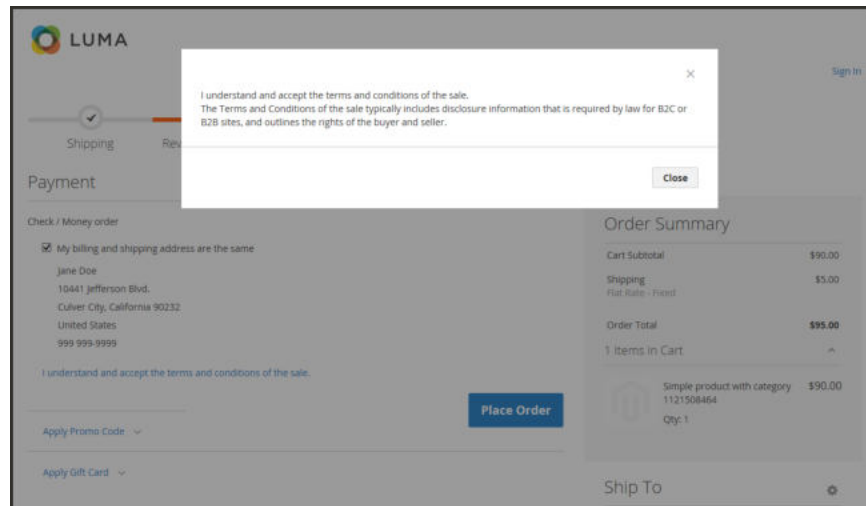
- Enable Onepage Checkout** [store view]: Yes (dropdown),  Use system value
- Allow Guest Checkout** [store view]: Yes (dropdown),  Use system value
- Enable Terms and Conditions** [store view]: No (dropdown),  Use system value
- Display Billing Address On** [store view]: Payment Method (dropdown),  Use system value
- Maximum Number of Items to Display in Order Summary** [store view]: 10 (input),  Use system value

*Checkout Options*

6. When complete, tap **Save Config.**


## Terms and Conditions

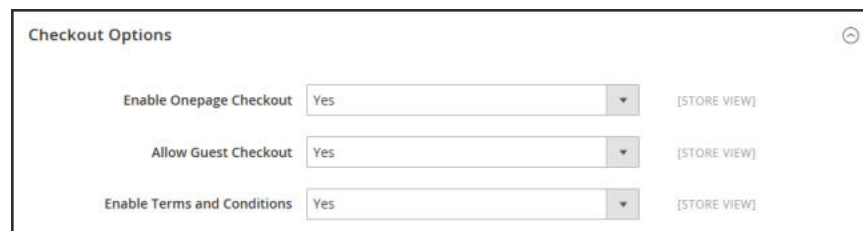
When Terms and Conditions is enabled, customers are required to agree to the terms and conditions of the sale before the purchase is finalized. The Terms and Conditions of the sale typically includes disclosure information that might be required by law for B2C or B2B sites, and outlines the rights of the buyer and seller. The Terms and Conditions message appears after the payment information, just before the Place Order button.



*Terms and Conditions at Checkout*

### Step 1: Enable Terms and Conditions

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand  the **Checkout Options** section. Then, do the following:
  - a. Verify that **Enable Onepage Checkout** is set to “Yes.”
  - b. Set **Enable Terms and Conditions** to “Yes.”

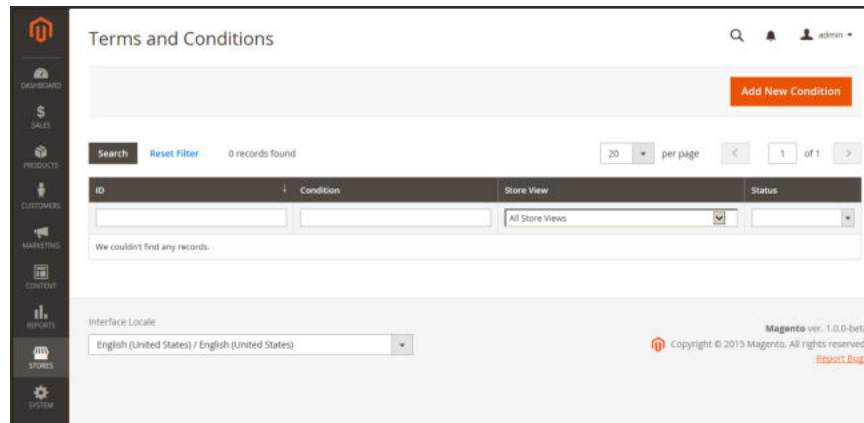


*Checkout Options*

4. When complete, tap **Save Config**.

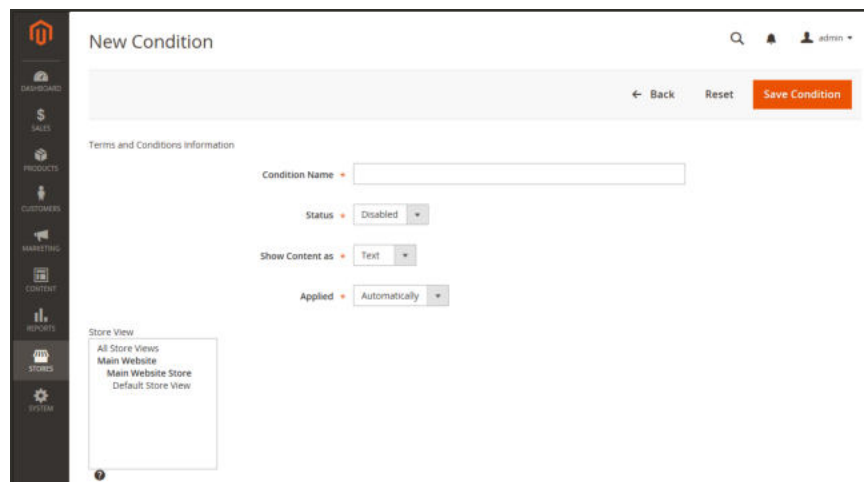
## Step 2: Add Your Terms and Conditions

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Terms and Conditions**.
2. In the upper-right corner, tap **Add New Condition**.



*Terms and Conditions Information*

3. In the Terms and Conditions Information section, complete the following:



*New Condition*

- a. Enter the **Condition Name** for internal reference.
- b. Set **Status** to “Enabled.”

- c.** Set **Show Content as** to one of the following:

Text	Displays the terms and conditions content as unformatted text.
HTML	Displays the content as HTML which can be formatted..
- 4.** Select each **Store View** where the Terms and Conditions is to be used.
- 5.** Enter the **Checkbox Text** to be used as the text for the Terms and Conditions link. For example, "I understand and accept the terms and conditions of the sale.
- 6.** In the **Content** box, enter the full text of the terms and conditions of the sale.
- 7.** (Optional) Enter the **Content Height (css)** in pixels, to determine the height of the text box where the terms and conditions statement appears during checkout. For example, to make the text box one inch high on a 96 dpi display, enter 96. A scroll bar appears if the content extends beyond the height of the box.
- 8.** When complete, tap **Save Condition**.

## One Page Checkout

The purpose of OnePage Checkout is to gather the information that is needed, and complete the sale as quickly as possible. When Onepage Checkout is enabled, the entire checkout process takes place on a single page. Each section of the checkout information is expanded as needed.

Magento's Onepage Checkout is enabled by default. If you are implementing a custom integration or checkout extension, it might be necessary to disable Onepage Checkout.

### To disable Onepage Checkout:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.

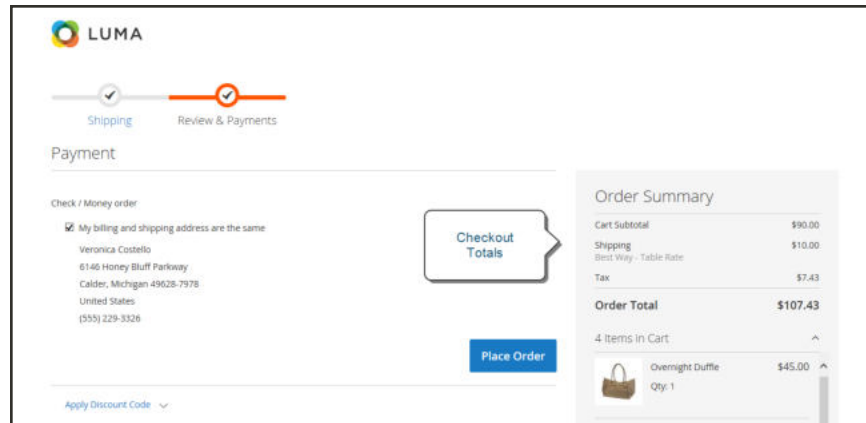
Checkout Options		
Enable Onepage Checkout <small>[store view]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Allow Guest Checkout <small>[store view]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Enable Terms and Conditions <small>[store view]</small>	No	
Display Billing Address On <small>[store view]</small>	Payment Method	
Maximum Number of Items to Display in Order Summary <small>[store view]</small>	10	<input checked="" type="checkbox"/> Use system value

*Checkout Options*

3. Expand ☺ the **Checkout Options** section.
4. If necessary, clear the **Use system value** checkbox. Then, do the following:
  - a. If the setting is for a specific store view, choose the store view where the configuration applies.
  - b. When prompted, tap **OK** to continue.
5. Set **Enable Onepage Checkout** to “No.”
6. When complete, tap **Save Config**.


## Checkout Totals Sort Order

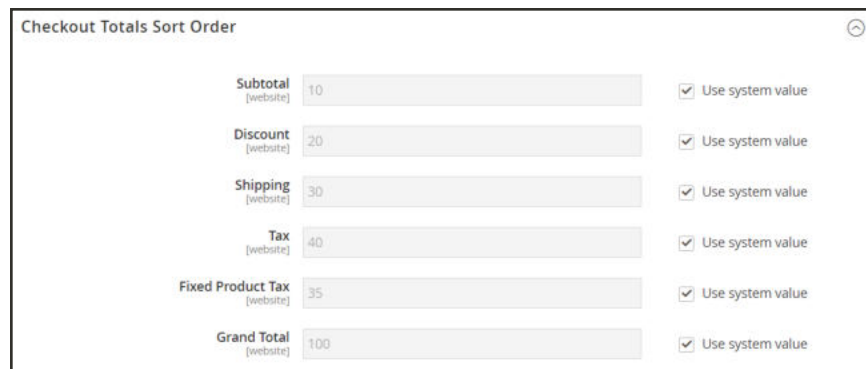
During Order Review, the total appears at the bottom of the order, with any adjustments for discounts, shipping charges, store credit, and tax. The order of each item determines the sequence of the calculations, and is set in the configuration by a number that is assigned to each item. For example, the Subtotal is the first item in the section, and is assigned a value of 10. The Grand Total appears last, and is assigned a value of 100. All of the other items in the totals section are assigned a value between those values.



*Checkout Totals*

### To configure the checkout totals:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand  the **Checkout Totals Sort Order** section.



*Checkout Totals Sort Order*

4. If necessary, clear the **Use system value** checkbox. Then, do the following:

- a. If the setting is for a specific store view, choose the store view where the configuration applies.
  - b. When prompted, tap **OK** to continue.
5. Change the number assigned to each item to determine its order in the Totals section..
6. When complete, tap **Save Config.**

# Order Management



## Contents

In this section of the guide, you will learn about each stage of the order workflow, and how to process orders, create invoices, and shipments.

You will also learn how to issue credit memos and manage returns.

### Orders

#### Order Workspace

- Order Actions

- Order Search

- Grid Layout

#### Order Workflow

- Processing Orders

#### Order Status

- Order Status Workflow

- Custom Order Status

- Order Status Notification

#### Scheduled Operations

- Pending Payment Order Lifetime

- Scheduled Grid Updates

#### Invoices

- Creating an Invoice

- Printing Multiple Invoices

#### Shipments

### Credit Memos

- Product Return Workflow

- Issuing a Credit Memo

- Printing Credit Memos

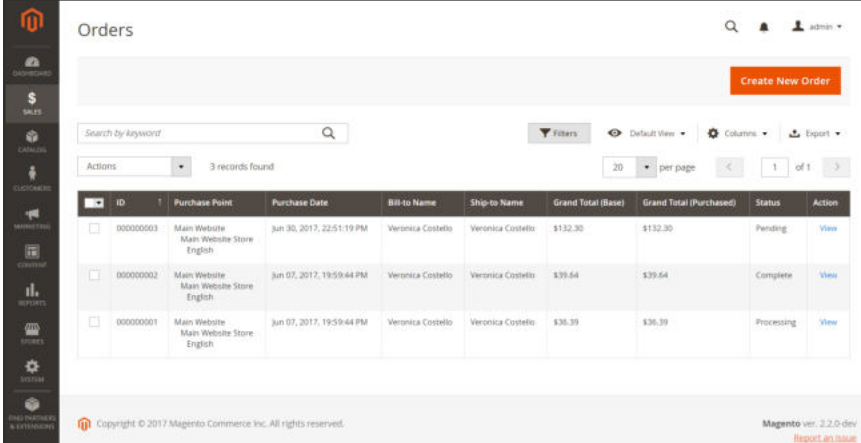
### Billing Agreements

### Transactions

## CHAPTER 56:

# Orders

The Orders workspace lists all current orders in descending order from latest purchase date. Each row in the grid represents an order, and each column represents an attribute, or data field. By default, orders display in descending order from latest to earliest purchase date. Use the standard **controls** to sort and filter the list, find orders, and apply **actions** to selected orders. You can view existing orders, and create new orders. The tabs above the pagination controls can be used to filter the list, change the default view, change and rearrange columns, and export data.



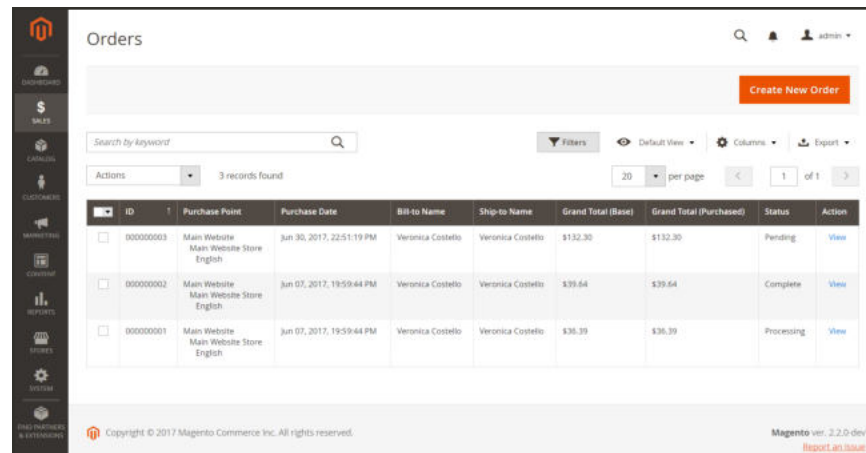
The screenshot shows the 'Orders' workspace in the Magento admin interface. It features a search bar, a 'Create New Order' button, and a table of orders. The table has the following columns: ID, Purchase Point, Purchase Date, Bill-to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchased), Status, and Action. There are three orders listed in the table.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000003	Main Website Main Website Store English	Jun 30, 2017, 22:51:19 PM	Veronica Costello	Veronica Costello	\$132.30	\$132.30	Pending	<a href="#">View</a>
000000002	Main Website Main Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	<a href="#">View</a>
000000001	Main Website Main Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	<a href="#">View</a>

Orders

## Order Workspace

The Order workspace lists all current orders. Each row in the grid represents a customer order, and each column represents an attribute, or data field. Use the standard **controls** to sort and filter the list, find orders, and apply **actions** to selected orders. From the grid, you can view existing orders, and create new orders. The tabs above the pagination controls are used to filter the list, change the default view, change and rearrange columns, and export data.




The screenshot displays the 'Orders' workspace in a Magento system. It features a sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Tools, and Settings. The main content area is titled 'Orders' and includes a 'Create New Order' button, a search bar, and various controls like filters, view options, columns, and export. Below these controls is a table with 3 records found, showing order details such as ID, Purchase Point, Purchase Date, Bill to Name, Ship to Name, Grand Total (Base), Grand Total (Purchased), Status, and Action.

ID	Purchase Point	Purchase Date	Bill to Name	Ship to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
00000003	Main Website Main Website Store English	Jun 30, 2017, 22:51:19 PM	Veronica Costello	Veronica Costello	\$132.30	\$132.30	Pending	<a href="#">View</a>
00000002	Main Website Main Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	<a href="#">View</a>
00000001	Main Website Main Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	<a href="#">View</a>

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[Report an Issue](#)

### Orders

## Workspace Controls

CONTROL	DESCRIPTION
	Creates a new order.
Search	Initiates a search for orders based on the current filters.
Filters	Defines a set of search parameters that determines the records that appear in the grid.
Default View	Determines the default column layout of the grid.
Columns	Determines the selection of columns and their order in the grid. The column layout can be changed, and saved as a “view.” By default, only some of the columns are included in the grid.
Export	Exports the selected records as a CSV or Excel XML file.

## Column Descriptions

COLUMN	DESCRIPTION
Select	Mark the checkbox to select the quote(s) to be subject to an action, or use the selection control in the column header. Options: Select All / Deselect All
ID	A unique, sequential number that is assigned when a new order is saved for the first time.
Purchase Point	Identifies the store view where the order was placed.
Purchase Date	The date the order was placed.
Bill-to Name	The name of the person who is responsible to pay for the order.
Ship-to Name	The name of the person to whom the order is to be shipped.
Grand Total (Base)	The grand total of the order.
Grand Total (Purchased)	The grand total of products purchased in the order.
Status	The current order status.
Action	View <span style="margin-left: 100px;">Opens the order in edit mode.</span>

### ADDITIONAL COLUMNS AVAILABLE

Billing Address	The billing address of the customer who placed the order.
-----------------	---

## Column Descriptions (cont.)

COLUMN	DESCRIPTION
Shipping Address	The address where the order is to be shipped.
Shipping Information	The method that is to be used to ship the order.
Customer Email	The email address of the person who placed the order.
Customer Group	The customer group to which the person who placed the order is assigned.
Subtotal	The order subtotal, without shipping and handling, and tax.
Shipping and Handling	The amount charged for shipping and handling.
Customer Name	The first and last name of the customer who placed the order.
Payment Method	The method of payment to be used for the order.
Total Refunded	Any amount from the order that is to be refunded to the customer.

## Order Actions

To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.

The screenshot shows the 'Orders' grid in the Magento admin interface. An 'Actions' dropdown menu is open over the first column of the table. The menu options are: Cancel, Hold, Unhold, Print Invoices, Print Packing Slips, Print Credit Memos, Print All, and Print Shipping Labels. The table below shows three orders with the following data:

Base Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
Website in Website Store English	Jun 30, 2017, 22:51:19 PM	Veronica Costello	Veronica Costello	\$132.30	\$132.30	Pending	View
Website in Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	View
Website in Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	View

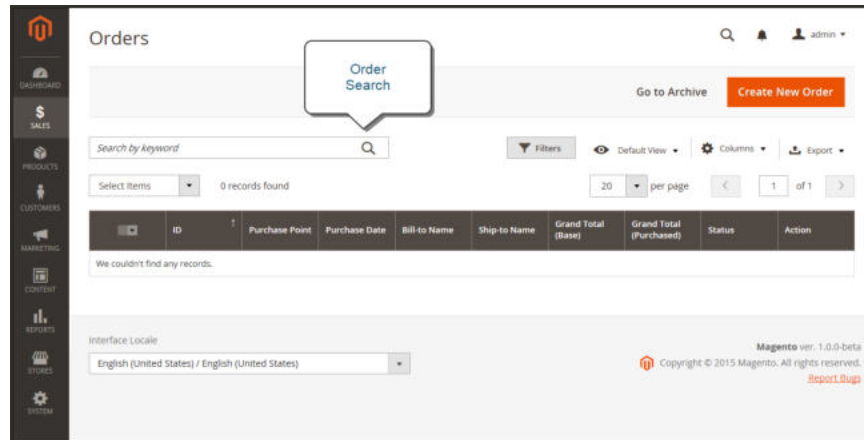
### Order Actions

## Action Controls

CONTROL	DESCRIPTION
Actions	<p>Lists all actions that can be applied to selected orders. To apply an action to an order, or group of orders, mark the checkbox in the first column of each order. Order actions:</p> <ul style="list-style-type: none"> <li>Cancel</li> <li>Hold</li> <li>Unhold</li> <li>Print <b>Invoices</b></li> <li>Print <b>Packing Slips</b></li> <li>Print <b>Credit Memos</b></li> <li>Print All</li> <li>Print <b>Shipping Labels</b></li> <li><b>Batch Process</b></li> </ul>
Mass Actions	<p>Can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that is subject to the action. Options:</p> <ul style="list-style-type: none"> <li>Select All / Unselect All,</li> <li>Select Visible / Unselect Visible</li> </ul>
<div style="border: 1px solid #ccc; background-color: #f0f0f0; padding: 5px; display: inline-block;">Submit</div>	Applies the current action to the selected order records.
Edit	Opens the order in edit mode.

## Order Search

The Search box in the upper-left of the Orders grid can be used to find specific orders by keyword, or by filtering the order records in the grid.



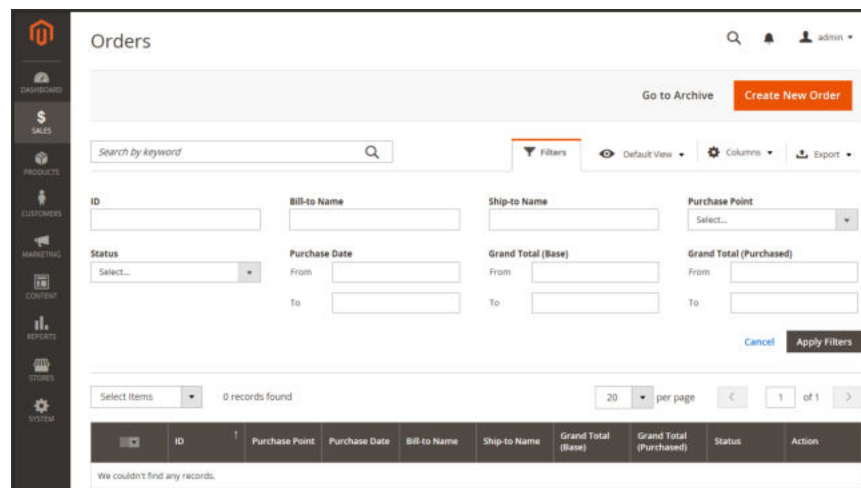
*Search Results*

### To search for a match:

1. Enter a search term into the page search box.
2. Tap **Search** ( 🔍 ) to display the results.

### To filter the search:

1. Tap the **Filters** ( ▼ ) tab to display the selection of search filters.
2. Complete as many of the filters as needed to describe the order(s) that you want to find.
3. Tap **Apply Filters** to display the results.



*Order Filters*

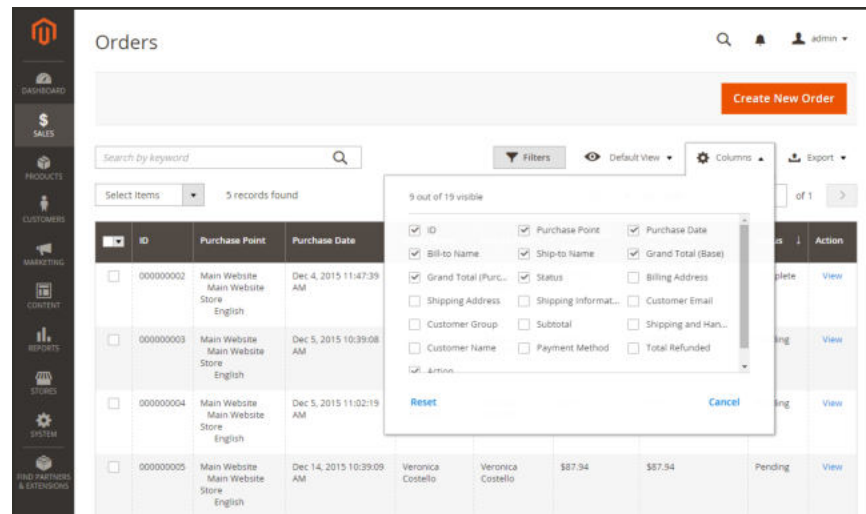
## Search Filters

FILTER	DESCRIPTION										
ID	Filters the search based on order ID.										
Bill-to Name	Filters the search by the name of the person who is responsible to pay for the order.										
Ship-to Name	Filters the search by the name of the person to whom each order is shipped .										
Purchase Point	Filters the search by website, store, or store view where the order was placed.										
Status	Filters the search based on order status. Options: <table border="0" data-bbox="695 726 1252 936"> <tr> <td>Canceled</td> <td>Payment Review</td> </tr> <tr> <td>Closed</td> <td>PayPal Canceled Reversal</td> </tr> <tr> <td>Complete</td> <td>Pending</td> </tr> <tr> <td>Suspected Fraud</td> <td>Pending Payment</td> </tr> <tr> <td>On Hold</td> <td>Processing</td> </tr> </table>	Canceled	Payment Review	Closed	PayPal Canceled Reversal	Complete	Pending	Suspected Fraud	Pending Payment	On Hold	Processing
Canceled	Payment Review										
Closed	PayPal Canceled Reversal										
Complete	Pending										
Suspected Fraud	Pending Payment										
On Hold	Processing										
Purchase Date	Filters the search based on the date purchased. To find orders within a range of dates, enter both the From and To dates.										
Grand Total (Base)	Filters the search based on the Grand Total of each order.										
Grand Total (Purchased)	Filters the search based on Grand Total of items purchased in each order.										
<input type="button" value="Apply Filters"/>	Applies all filters to the search.										
Cancel	Cancels the current search.										
Clear All	Clears all search filters.										

## Order Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. The new layout can be saved as a grid “view.” By default, only nine of twenty available columns are included in the grid.





*Order Grid Columns*

### To change the column selection:

In the upper-right corner, tap the **Columns** (  ) control. Then, do the following:



- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

Make sure to scroll down to see all available columns.

### To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.


### To save a grid view:

1. Tap the **View** (  ) control. Then, tap **Save Current View**.
2. Enter a **name** for the view. Then, click the **arrow** (  ) to save all changes.

The name of the view now appears as the current view.

### To change the view:

Tap the **View** (  ) control. Then, do one of the following:

- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** (  ) icon. Then, update the name.

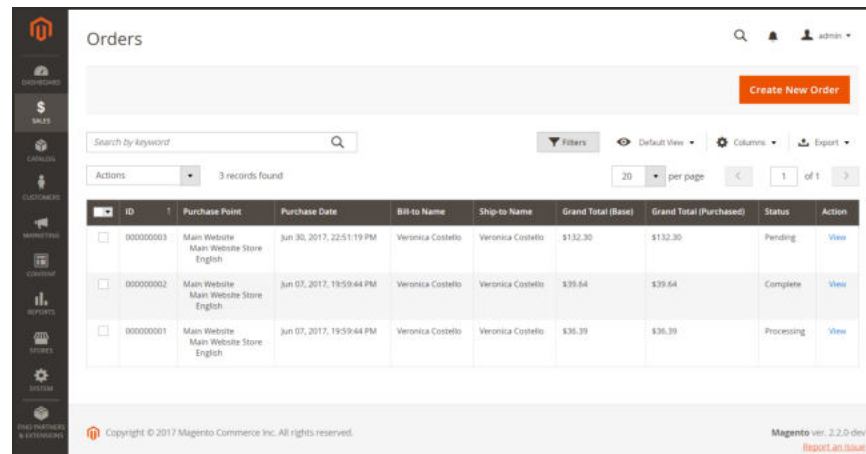
## Order Workflow

When a customer places an order, a sales order is created as a temporary record of the transaction. In the Orders grid, sales orders initially have a status of "Pending," and can be canceled at any time until the payment is processed. After payment is confirmed, the order can be invoiced and shipped.

- 1 Place Order.** The checkout process begins when the shopper clicks the Go to Checkout button on the shopping cart page or **reorders** directly from their customer account.
- 2 Order Pending.** In the Orders grid, the status of the sales order is initially "Pending." Payment has not been processed, and the order can still be edited or canceled.
- 3 Receive Payment.** The status of the order changes to "Processing." when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.
- 4 Invoice Order.** An order is typically invoiced after payment is received. Some payment methods generate an invoice automatically when payment is authorized and captured. The payment method determines which invoicing options are needed for the order. After the invoice is generated and submitted, a copy is sent to the customer.
- 5 Book a Single Shipment.** When the shipment detail is complete, the shipment is booked, and the packing slip and shipping label are printed. The customer receives notification, and the package is shipped. If tracking numbers are used, the shipment can be tracked from the customer's account.  
**Book a Batch of Shipments.** (Magento Shipping only) Enter and process the shipment information for multiple orders as a **batch**.
- 6 Create a Dispatch.** (Magento Shipping only) Create a **dispatch** that lists the packages that are ready for pickup, and print the manifest.

## Processing an Order

When a customer places an order, a sales order is created as a temporary record of the transaction. The sales order has a status of “Pending” until payment is received. Sales orders can be edited while pending, and can be canceled up until the time that an invoice is generated. An easy way to think of it is this: Orders become invoices, and invoices become shipments. The Orders grid lists all orders, regardless of where they are in the **workflow**.



The screenshot shows the 'Orders' grid in the Magento Admin interface. The grid contains three records. The first record is in 'Pending' status, the second is 'Complete', and the third is 'Processing'. Each record has a 'View' link in the 'Action' column. The interface includes a search bar, a 'Create New Order' button, and a sidebar with navigation icons.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
00000003	Main Website Main Website Store English	Jun 30, 2017, 2:51:19 PM	Veronica Costello	Veronica Costello	\$132.30	\$132.30	Pending	<a href="#">View</a>
00000002	Main Website Main Website Store English	Jun 07, 2017, 1:59:44 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	<a href="#">View</a>
00000001	Main Website Main Website Store English	Jun 07, 2017, 1:59:44 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	<a href="#">View</a>

*Orders*

### To view an order:

1. On the Admin sidebar, tap **Sales**. Then choose **Orders**.
2. Find the order in the grid, and in the **Action** column, click **View**.
  - A pending order can be modified, put on hold, canceled, or invoiced and shipped.
  - A completed order can be reordered.

The panel on the left of an open order provides access to different types of information that is related to the order.

The screenshot displays the 'View Order' page in the Magento Admin interface. The order ID is #000000004. The page is divided into several sections:

- Order & Account Information:**
  - Order # 000000004 (The order confirmation email was sent)
  - Order Date: Dec 5, 2015, 11:02:19 AM
  - Order Status: Pending
  - Purchased From: Main Website, Main Website Store, English
  - Placed from IP: 10.237.190.43
- Account Information:**
  - Customer Name: Veronica Costello
  - Email: roni\_cost@example.com
  - Customer Group: General
- Address Information:**
  - Billing Address:** Veronica Costello, 6146 Honey Bluff Parkway, Calder, Michigan, 49628-7978, United States, T: (555) 229-3326
  - Shipping Address:** Veronica Costello, 6146 Honey Bluff Parkway, Calder, Michigan, 49628-7978, United States, T: (555) 229-3326

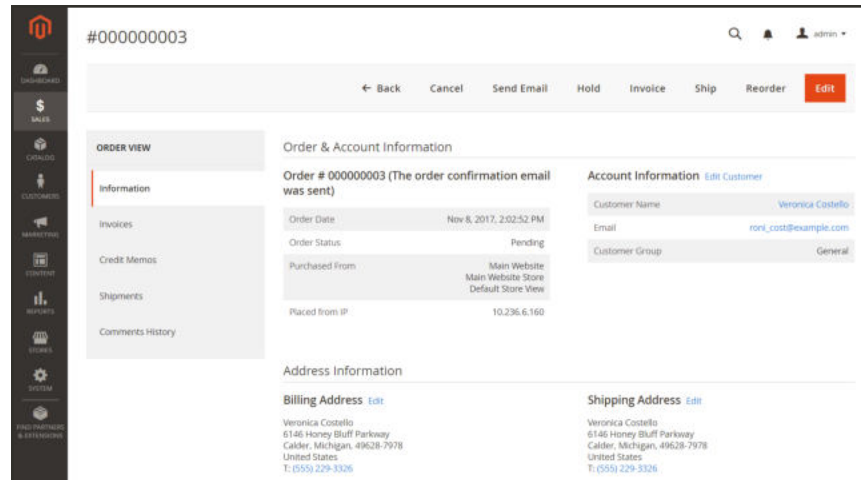
On the left sidebar, the 'ORDERS' section is expanded to show 'Information', 'Invoices', 'Credit Memos', 'Shipments', and 'Comments History'. At the top right, there are navigation buttons: Back, Cancel, Send Email, Hold, Invoice, Ship, Reorder, and Edit.

*View Order*

### To process an order:

1. To open a pending sales order, and tap the **Edit** button in the upper-right corner.

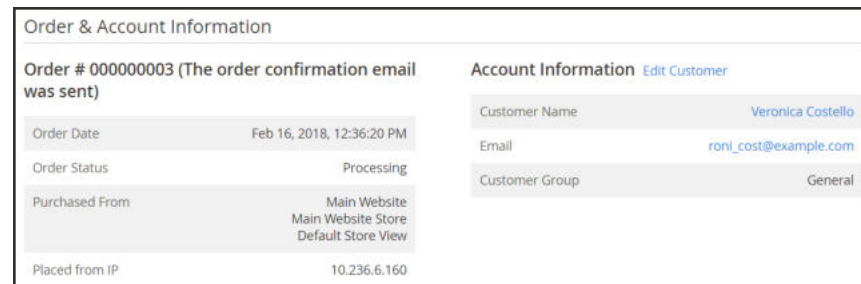
Orders can be edited only while the status is "Pending". The Edit button isn't visible for orders that are "Processing".



*Edit Sales Order*

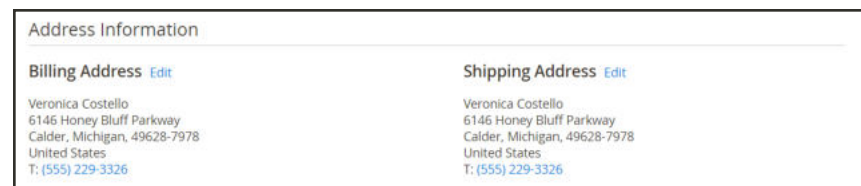
2. Review the following sections in the sales order, using the field descriptions for reference.

### Order and Account Information



*Order and Account Information*

### Address Information



*Address Information*

### Payment & Shipping Method

Payment & Shipping Method	
<b>Payment Information</b>	<b>Shipping &amp; Handling Information</b>
Credit Card (Braintree)	<b>Flat Rate - Fixed \$5.00</b>
Credit Card Type: Visa	
Credit Card Number: xxxx-1111	
AVS Postal Code Response Code: M	
AVS Street Address Response Code: M	
CVV Response Code: M	
Processor Authorization Code: 5Z31DC	
Processor Response Code: 1000	
Processor Response Text: Approved	
The order was placed using USD.	

*Payment & Shipping Method*

### Items Ordered

Items Ordered									
Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Tristan Endurance Tank	Ordered	\$29.00	\$29.00	Ordered 1	\$29.00	\$2.39	8.25%	\$0.00	\$31.39
SKU: MT02-L-Gray									
Size: L									
Color: Gray									

*Items Ordered*

3. In the **Order Total** section, do the following:
  - a. Enter a **Comment** to include with the order.
  - b. If you want to email the comment to the customer, mark the **Notify Customer by Email** checkbox.
  - c. If you want the comment to be visible in the customer account, mark the **Visible on Storefront** checkbox.

**Order Total**

**Notes for this Order**

Status  
Processing ▼

Comment

Notify Customer by Email  
 Visible on Storefront

**Submit Comment**

Feb 16, 2018 12:36:20 PM | Processing | Customer **Not Notified**  
Authorized amount of \$36.39. Transaction ID: "e41mdhpm"

**Order Totals**

Subtotal	\$29.00
Shipping & Handling	\$5.00
Tax	\$2.39
<b>Grand Total</b>	<b>\$36.39</b>
<b>Total Paid</b>	<b>\$0.00</b>
<b>Total Refunded</b>	<b>\$0.00</b>
<b>Total Due</b>	<b>\$36.39</b>

*Order Total*

4. If you are ready to invoice the order, tap **Invoice**. Then follow the instructions to [Creating an Invoice](#)

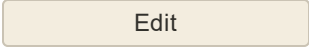
### Order View Descriptions

TAB	DESCRIPTION
Information	Display detailed information about the order and account, including the billing and shipping addresses, payment and shipping methods, items orders, totals, and notes.
Invoices	Lists each invoice that is associated with the order.
Credit Memos	Lists each credit memo that is associated with the order.
Shipments	Lists each shipment record that is associated with the order.
Comments History	Lists all notes that are related to the order.

### Button Bar

BUTTON	DESCRIPTION
Back	Returns to the Orders page without saving changes.
Cancel	Cancels the sales order.
Send Email	Sends an email about the order to the customer.
Hold / Unhold	Changes the status of the sales order to "On Hold". To release the hold on the sales order, choose "Unhold".
Invoice	Creates an invoice from the sales order by converting the order to an invoice.

**Button Bar (cont.)**

BUTTON	DESCRIPTION
Ship	Creates a shipment record for the order.
Reorder	Creates a new sales order based on the current order.
	Opens a pending order in edit mode. The Edit button isn't visible for orders with a status of "Processing".

**Field Descriptions**

FIELD	DESCRIPTION
<b>ORDER &amp; ACCOUNT INFORMATION</b>	
Order Number	The order number appears at the top of the sales order, and also in the Order & Account Information, followed by a note that indicates if the confirmation email was sent.
Order Date	The date and time the order was placed.
Purchased From	Indicates the website, store, and store view where the order was placed.
Placed from IP	Indicates the IP address of the computer from which the order was placed.
<b>Account Information</b>	
Customer Name	The name of the customer who placed the order. The Customer Name is linked to the customer profile.
Email	The email address of the customer. The email address is linked to open a new email message.
Customer Group	The name of the customer group to which the customer is assigned.
<b>ADDRESS INFORMATION</b>	
Billing Address	The name of the customer who placed the order, followed by the billing address, telephone number and VAT, if applicable. The telephone number is linked to autodial on a mobile device.
Shipping Address	The name of the person to whose attention the order should be shipped, followed by the shipping address and telephone number. The telephone number is linked to autodial on a mobile device.



**Field Descriptions (cont.)**

FIELD	DESCRIPTION
<b>PAYMENT &amp; SHIPPING METHOD</b>	
Payment Information	The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order.
Shipping & Handling Information	The shipping method to be used, and any handling fee that is applicable.
<b>ITEMS ORDERED</b>	
Product	The product name, SKU, and options if applicable.
Item Status	Indicates the status of the item. Values: Ordered
Original Price	The original catalog price of the item before discounts.
Price	The purchase price of the item.
Qty	The quantity ordered.
Subtotal	The subtotal is the purchase price multiplied by the quantity.
Tax Amount	The amount of tax that applies to the item as a decimal value.
Tax Percent	The percentage of tax applied to this item as a percentage.
Discount Amount	The discount that applies to this item.
Row Total	The line item total, including applicable taxes that are due at the product level, less discounts.
<b>ORDER TOTAL</b>	
<b>Notes for this Order</b>	
Status	Indicate the current status of the sales order.
Comment	A text box that is used to enter a comment to the customer that accompanies the order.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Notify Customer by Email	Mark the checkbox if you want to send the comment to the customer as a separate email.
Visible on Storefront	Mark the checkbox if you want the comment to be visible from the customer's account.
<input type="button" value="Submit Comment"/>	Submits the comment, and send by email, if applicable.
<b>Order Totals</b>	
Shipping & Handling	The amount charged for shipping and handling fees.
Tax	The amount of tax applied to the order, if applicable.
Grand Total	The order total.
Total Paid	The total amount paid toward the order, if applicable.
Total Refunded	The total amount refunded from the order, if applicable.
Total Due	The total amount that is due.

## Order Status

All orders have an order status that is associated with a stage in the order processing [workflow](#). The status of each order is shown in the Status column of the Orders grid. Your store has a set of predefined order status and order state settings. The order state describes the position of an order in the [workflow](#).

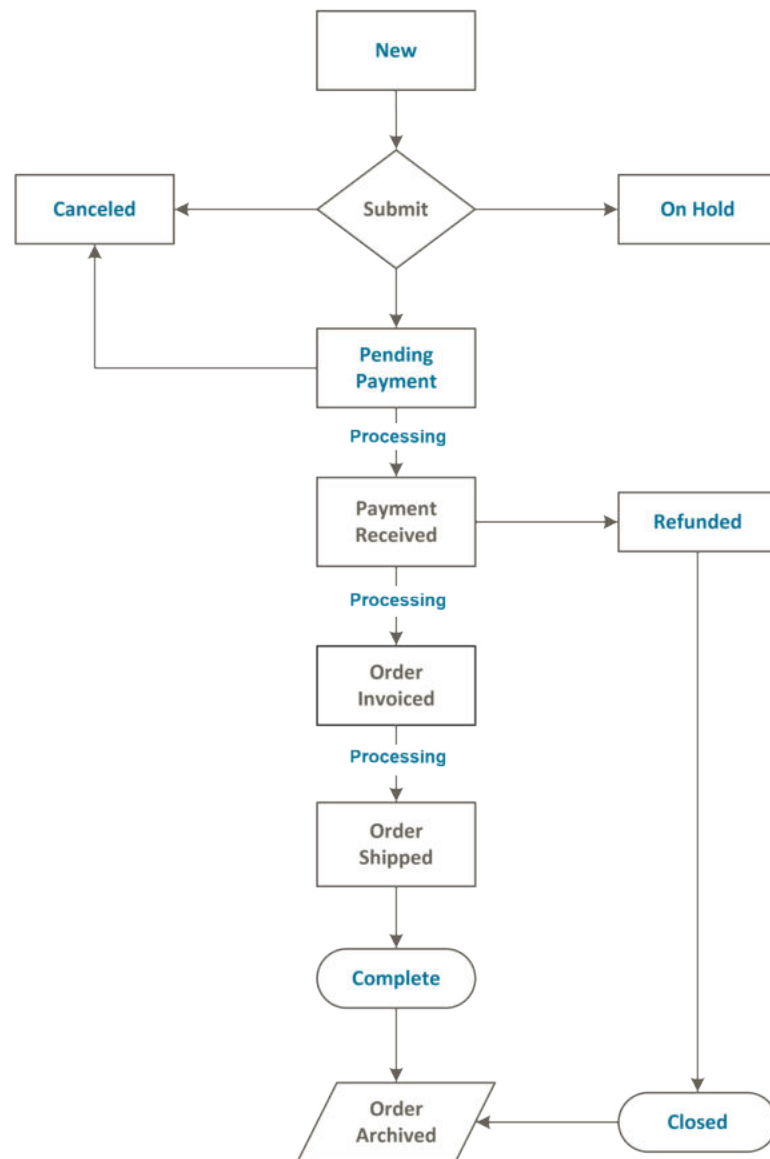
Order	Purchase Point	Purchase Date	Bill to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
00000002	Main Website Main Website Store English	Jun 7, 2015 8:21:52 PM	Veronica Costello	Veronica Costello	\$80.62	\$80.62	Closed	View
00000001	Main Website Main Website Store English	Jun 7, 2015 8:21:30 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	View

*Order Status*

### Predefined Order Status

ORDER STATUS	STATUS CODE
Processing	processing
Suspected Fraud	fraud
Pending Payment	pending_payment
Payment Review	payment_review
Pending	pending
On Hold	holded
Open	STATE_OPEN
Complete	complete
Closed	closed
Canceled	canceled
PayPal Canceled Reversal	paypay_canceled_reversal
Pending PayPal	pending_paypal
PayPal Reversed	paypal_reversed

## Order Status Workflow



## Custom Order Status

In addition to the preset order status settings, you can create custom order status settings of your own, assign them to order states, and set a default order status for order states. For example, you might need a custom order status for orders such as “packaging” or “backordered,” or for a status that is specific to your needs. You can create a descriptive name for the custom status, and assign it to the associated order state in the workflow.

Only default custom order status values are used in the order workflow. Custom status values that are not set as default can be used only in the comments section of the order.

Status	Status Code	Default Status	Visible On Storefront	State Code and Title	Action
Processing	processing	Yes	Yes	processing[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	processing[Suspected Fraud]	Unassign
Pending Payment	pending_payment	Yes	No	pending_payment[Pending Payment]	Unassign
Payment Review	payment_review	Yes	Yes	payment_review[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	payment_review[Suspected Fraud]	Unassign
Pending	pending	Yes	Yes	new[Pending]	Unassign
On Hold	holded	Yes	Yes	holded[On Hold]	Unassign
Complete	complete	Yes	Yes	complete[Complete]	Unassign
Closed	closed	Yes	Yes	closed[Closed]	Unassign
Canceled	canceled	Yes	Yes	canceled[Cancelled]	Unassign
Pending PayPal	pending_paypal				
PayPal Reversed	paypal_reversed				
PayPal Canceled Reversal	paypal_canceled_reversal				

*Order Status Settings*

### To create a custom order status:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Order Status**.
2. In the upper-right corner, tap **Create New Status**.

*Create New Order Status*

3. Under **Order Status Information** section, do the following:
  - a. Enter a **Status Code** for internal reference. The first character must be a letter (a-z), and the rest can be any combination of letters and numbers (0-9). Use the underscore character instead of a space.
  - b. Enter a **Status Label** to identify the status setting in both the Admin and storefront.
4. In the **Store View Specific Labels** section, enter any labels that are needed for different store views.
5. When complete, tap **Save Status**.

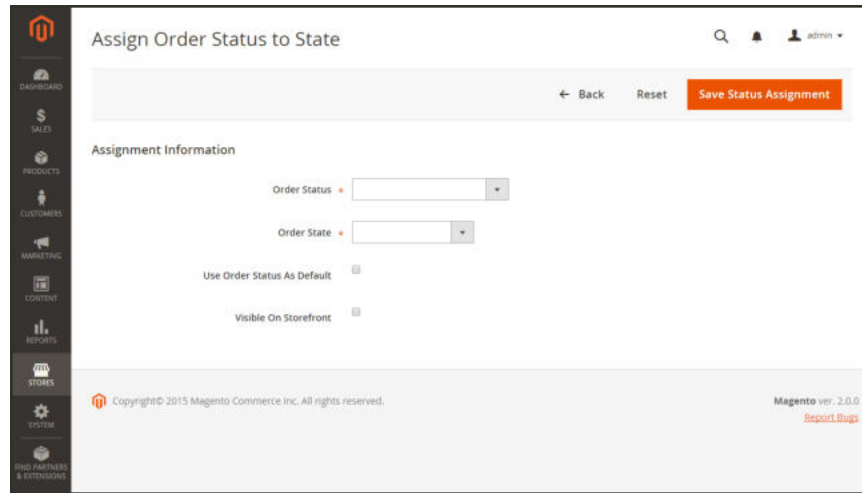
## To assign an order status to a state:

1. On the Order Status page, tap **Assign Status to State**.

Status	Status Code	Default Status	Visible On Storefront	State Code and Title	Action
Processing	processing	Yes	Yes	processing[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	processing[Suspected Fraud]	Unassign
Pending Payment	pending_payment	Yes	No	pending_payment[Pending Payment]	Unassign
Payment Review	payment_review	Yes	Yes	payment_review[Suspected Fraud]	Unassign
Suspected Fraud	fraud	No	Yes	payment_review[Suspected Fraud]	Unassign
Pending	pending	Yes	Yes	new[Pending]	Unassign
On Hold	holded	Yes	Yes	holded[On Hold]	Unassign
Complete	complete	Yes	Yes	complete[Complete]	Unassign
Closed	closed	Yes	Yes	closed[Closed]	Unassign
Canceled	canceled	Yes	Yes	canceled[Cancelled]	Unassign
Pending PayPal	pending_paypal				
PayPal Reversed	paypal_reversed				
PayPal Canceled Reversal	paypal_canceled_reversal				

### Assign Status

2. In the **Assignment Information** section, do the following:
  - a. Choose the **Order Status** that you want to assign. They are listed by status label.
  - b. Set **Order State** to the place in the workflow where the order status belongs.
  - c. To make this status the default for the order state, mark the **Use Order Status as Default** checkbox.
  - d. To make this status visible from the storefront, mark the **Visible On Storefront** checkbox.



*Assign Status to State*

3. When complete, tap **Save Status Assignment**.

**To edit an existing order status:**

1. In the Order Status grid, open the status record in edit mode.
2. Update the status settings as needed.
3. When complete, tap **Save Status**.

**To remove an order status from an assigned state:**

A status setting cannot be unassigned from a state if the status is currently in use.

1. In the Order Status grid, find the order status record to be unassigned.
2. In the **Action** column on the far right of the row, tap the **Unassign** link.

A message appears at the top of the workspace that the order status has been unassigned. Although the order status label still appears in the list, it is no longer assigned to a state. Order status settings cannot be deleted.

**Order Status and State**

ORDER STATUS	ORDER STATE	
Processing	processing	When the state of new orders is set to “Processing,” the option to “Automatically Invoice All Items” becomes available in the configuration.



### Order Status and State (cont.)

ORDER STATUS	ORDER STATE
Suspected Fraud	fraud
Pending Payment	pending_payment
Payment Review	payment_review
Suspected Fraud	fraud
Pending	pending
On Hold	holded
Complete	complete
Closed	closed
Canceled	canceled
PayPal Canceled Reversal	payment_canceled_reversal
PayPal Reversed	paypal_reversed
Pending PayPal	pending_paypal

## Order Status Notification

Customers can track the status of their orders by [RSS feed](#) if the Order RSS feed is enabled in the configuration. When enabled, a link to the RSS feed appears on each order.



*Customer Order Status Notification*

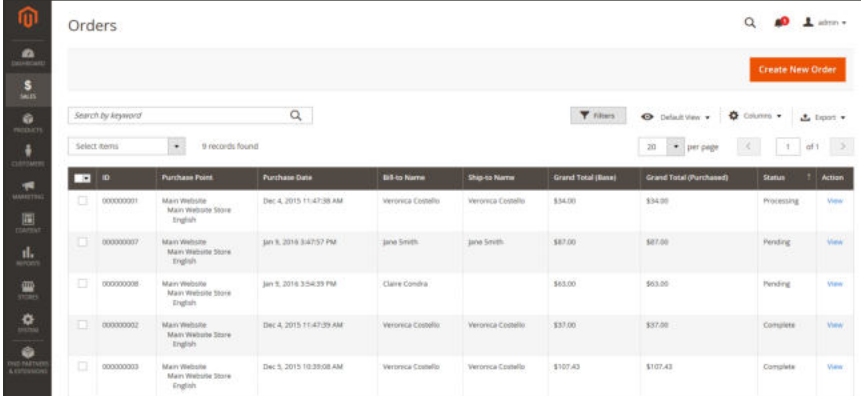
### To enable Order Status Notification:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
3. Expand ☺ the **Order** section.
4. Set **Customer Order Status Notification** to “Enable”.
5. When complete, tap **Save Config**.

## Scheduled Order Operations

Magento **cron** jobs can be used to schedule the following order management tasks:

- Pending Payment Order Lifetime
- Scheduled Grid Updates



The screenshot shows the 'Orders' grid in the Magento Admin interface. It features a search bar, filters, and a table of orders. The table has columns for ID, Purchase Point, Purchase Date, Bill to Name, Ship-to Name, Grand Total (Base), Grand Total (Purchase), Status, and Action. Three orders are highlighted in grey, indicating they are pending.

ID	Purchase Point	Purchase Date	Bill to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchase)	Status	Action
00000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	View
00000007	Main Website Main Website Store English	Jan 8, 2016 3:47:57 PM	Jane Smith	Jane Smith	\$87.00	\$87.00	Pending	View
00000008	Main Website Main Website Store English	Jan 8, 2016 3:54:39 PM	Clare Concha		\$63.00	\$63.00	Pending	View
00000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	View
00000003	Main Website Main Website Store English	Dec 5, 2015 10:39:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	View

*Orders Grid with Pending Orders*

## Pending Payment Order Lifetime

The lifetime of orders with pending payments is determined by the Orders Cron Settings configuration. The default value is set to 480 minutes, which is eight hours.

### To set the lifetime of orders with pending payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand ☺ the **Orders Cron Settings** section.



The screenshot shows the 'Orders Cron Settings' configuration panel. It contains a text input field for 'Pending Payment Order Lifetime (minutes)' with the value '480' and a checkbox labeled 'Use system value' which is checked.

*Orders Cron Settings*

4. In the **Pending Payment Order Lifetime (minutes)** field, enter the number of minutes before a pending payment expires.
5. When complete, tap **Save Config**.

## Scheduled Grid Updates

The Grid Settings configuration schedules updates to the following order management grids, and reindexes the data as scheduled by **Cron**:

- **Orders**
- **Invoices**
- **Shipments**
- **Credit Memos**

The benefits of scheduling these tasks is to avoid the locks that occur when data is saved, and to reduce processing time. When enabled, any updates take place only during the scheduled cron job. For best results, Cron should be configured to run once every minute.

### To enable scheduled grid updates and reindexing:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☺ the **Grid Settings** section.
4. Set **Asynchronous Indexing** to “Enable.”



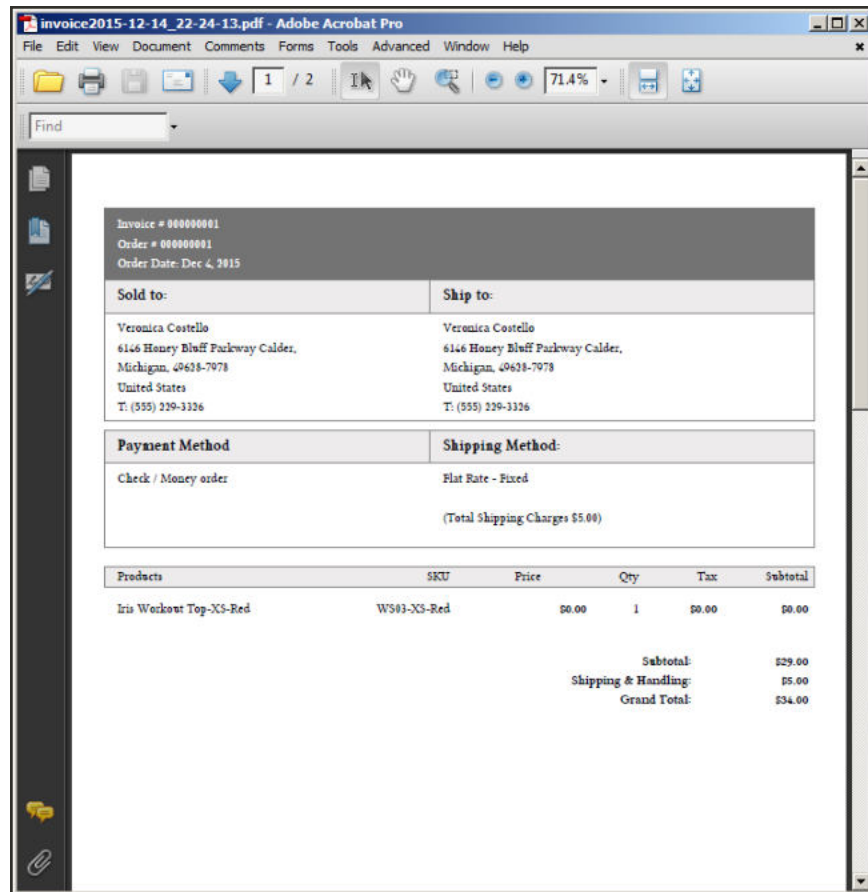
*Grid Settings*

5. When complete, tap **Save Config**.

## CHAPTER 57:

# Invoices

An invoice is a record of the record of payment for an order. Multiple invoices can be created for a single order, and each can include as many or as few of the purchased products that you specify. You can upload a high-resolution logo for a print-ready PDF invoice, and include the **Order ID** in the header. To customize the invoice template with your logo, see: [Preparing Your Invoice Logo](#).



PDF Invoice

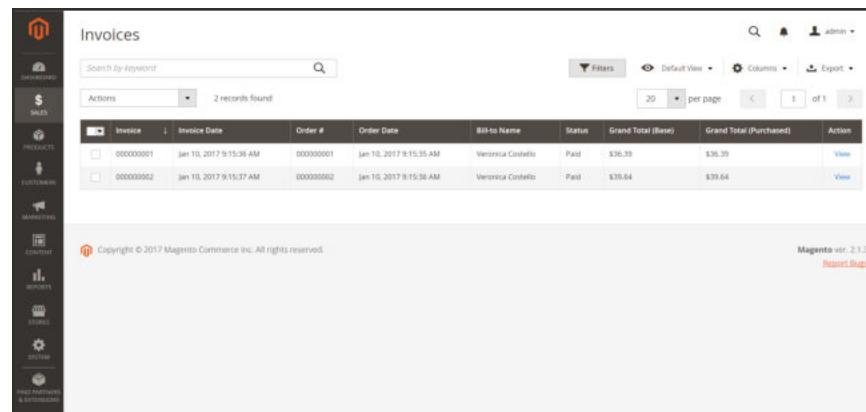
## Creating an Invoice

Creating an invoice for an order converts the temporary sales order into a permanent record of the order that cannot be canceled. A new invoice page looks similar to a completed order, with some additional fields. Every activity that is related to an order is noted in the Comments section of the invoice.

Normally, orders are invoiced and shipped after payment is received. However, if the method of payment is a purchase order, the order can be invoiced and shipped before payment is received. You can generate an invoice with a packing slip, and also print shipping labels from your carrier account. A single order can be divided into partial shipments which are invoiced separately, if necessary.

When the state of new orders is set to “Processing,” the option to “Automatically Invoice All Items” becomes available in the configuration. Some credit card payment methods complete the invoicing step as part of the process when Payment Action is set to “Authorize and Capture.” In such a case, the Invoice button does not appear, and the order is ready to ship.

Before an invoice can be printed, it must first be generated for the order. To view or print the PDF, first download and install a PDF reader such as [Adobe Acrobat Reader](#).



The screenshot shows the 'Invoices' page in a Magento admin interface. It features a search bar, a table with two invoice records, and a sidebar with navigation icons. The table columns are: Invoice, Invoice Date, Order #, Order Date, Bill to Name, Status, Grand Total (Base), Grand Total (Purchased), and Action. The footer includes copyright information for 2017 and the Magento version 2.1.3.

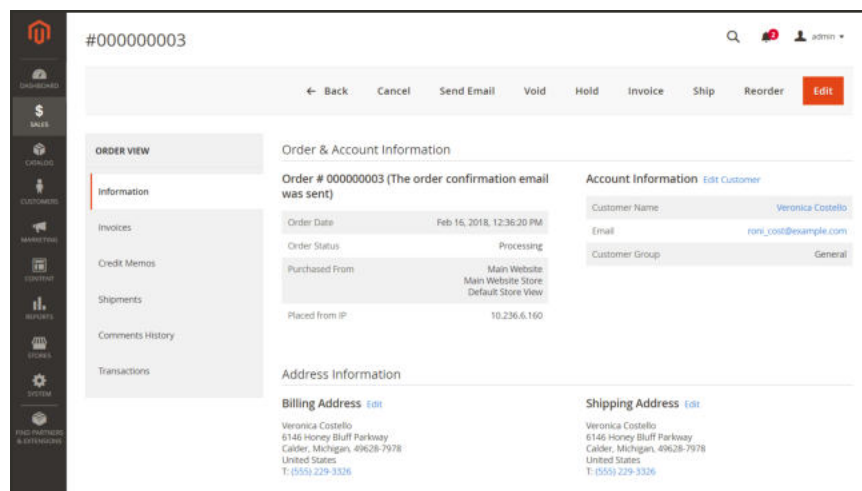
Invoice	Invoice Date	Order #	Order Date	Bill to Name	Status	Grand Total (Base)	Grand Total (Purchased)	Action
<input type="checkbox"/> 00000001	Jan 10, 2017 9:15:38 AM	00000001	Jan 10, 2017 9:15:35 AM	Veronica Costello	Paid	\$36.39	\$36.39	<a href="#">View</a>
<input type="checkbox"/> 00000002	Jan 10, 2017 9:15:37 AM	00000002	Jan 10, 2017 9:15:38 AM	Veronica Costello	Paid	\$39.64	\$39.64	<a href="#">View</a>

*Invoices*

**To invoice an order:**

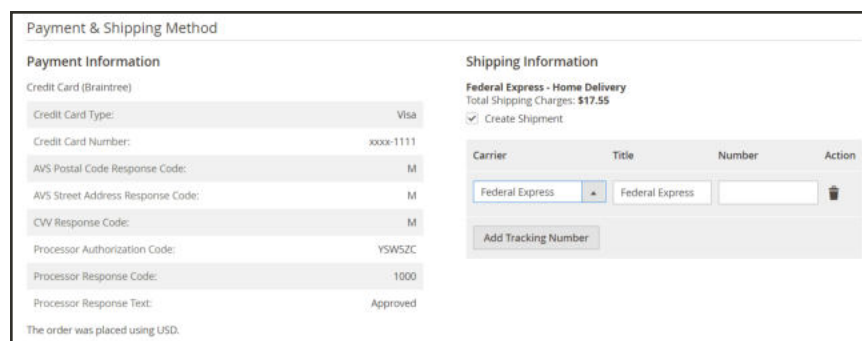
1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the sales order with the status of “Processing” in the grid. Then, do the following:
  - a. In the **Action** column, click the **View** link.
  - b. In the header of the sales order, choose the **Invoice** option. The new invoice page looks similar to a completed order page, with additional fields that can be edited.

The Invoice option does not appear if the payment method is set to “Authorize and Capture.”



*Invoice Sales Order*

3. If the items are ready to ship, you can generate a packing slip for the shipment at the same time you create the invoice. To create a packing slip, do the following:
  - a. In the **Shipping Information** section, mark the **Create Shipment** checkbox. A shipment record will be created at the same time the invoice is generated.



*Create Shipment*

- b. To include a tracking number, tap **Add Tracking Number**. Then, enter the following:
  - Carrier
  - Title
  - Number
- c. If you need to generate a partial invoice, do the following:

In the **Items to Invoice** section, update the **Qty to Invoice** column to include only specific items on the invoice. Then, tap **Update Qty's**.

Items to Invoice							
Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Overnight Duffie SKU: 24-WB07	\$45.00	Ordered 1	<input type="text" value="1"/>	\$45.00	\$3.71	\$0.00	\$48.71
Affirm Water Bottle SKU: 24-UG06	\$7.00	Ordered 1	<input type="text" value="1"/>	\$7.00	\$0.58	\$0.00	\$7.58
Harmony Lumaflex™ Strength Band Kit SKU: 24-UG03	\$22.00	Ordered 1	<input type="text" value="1"/>	\$22.00	\$1.82	\$0.00	\$23.82
Pursuit Lumaflex™ Tone Band SKU: 24-UG02	\$16.00	Ordered 1	<input type="text" value="1"/>	\$16.00	\$1.32	\$0.00	\$17.32
<input type="button" value="Update Qty's"/>							

*Items to Invoice*

4. If an online payment method was used for the order, set **Amount** to the appropriate option.
5. To notify customers by email when the invoice is generated, do the following:
  - a. Mark the **Email Copy of Invoice** checkbox.
  - b. Enter any **Invoice Comments**. To include the comments in the notification email, mark the **Append Comments** checkbox.
6. When complete, tap **Submit Invoice** at the bottom of the page. The status of the order changes from "Pending" to "Complete."

Order Total

Invoice History

Invoice Comments

Subtotal	\$29.00
Shipping & Handling	\$17.55
Tax	\$2.39
<b>Grand Total</b>	<b>\$48.94</b>

Amount

Capture Online

Append Comments

Email Copy of Invoice

*Submit Invoice (Online Payment Method)*

Order Total

Invoice History

Invoice Comments

Subtotal	\$90.00
Shipping & Handling	\$10.00
Tax	\$7.43
<b>Grand Total</b>	<b>\$107.43</b>

Append Comments

Email Copy of Invoice

*Submit Invoice (Offline Payment Method)*



#000000006

🔍 🔔 admin ▾

← Back Send Email Print

---

**Order & Account Information**

**Order # 00000006** (The order confirmation email was sent)

Order Date	Dec 16, 2015, 2:59:10 PM
Order Status	Complete
Purchased From	Main Website Main Website Store English
Placed from IP	10.237.184.95

**Account Information**

Customer Name	Jane Smith
Email	janesmith@example.com
Customer Group	General

---

**Address Information**

**Billing Address** [Edit](#)

Jane Smith  
10441 Jefferson Blvd, Suite 200  
Culver City, California, 90232  
United States  
T: (000) 123-4567

**Shipping Address** [Edit](#)

Jane Smith  
10441 Jefferson Blvd, Suite 200  
Culver City, California, 90232  
United States  
T: (000) 123-4567

---

**Payment & Shipping Method**

**Payment Information**

Check / Money order  
The order was placed using USD.

**Shipping Information**

**Best Way - Table Rate**  
Total Shipping Charges: **\$10.00**

---

**Items Invoiced**

Product	Price	Qty	Subtotal	Tax Amount	Discount Amount	Row Total
Luma Analog Watch SKU: 24-WG09	\$43.00	1	\$43.00	\$0.00	\$0.00	\$43.00
Summit Watch SKU: 24-MG03	\$54.00	1	\$54.00	\$0.00	\$0.00	\$54.00

**Order Total**

---

**Invoice History**

Comment Text

Notify Customer by Email

Visible on Storefront

**Submit Comment**

**Invoice Totals**

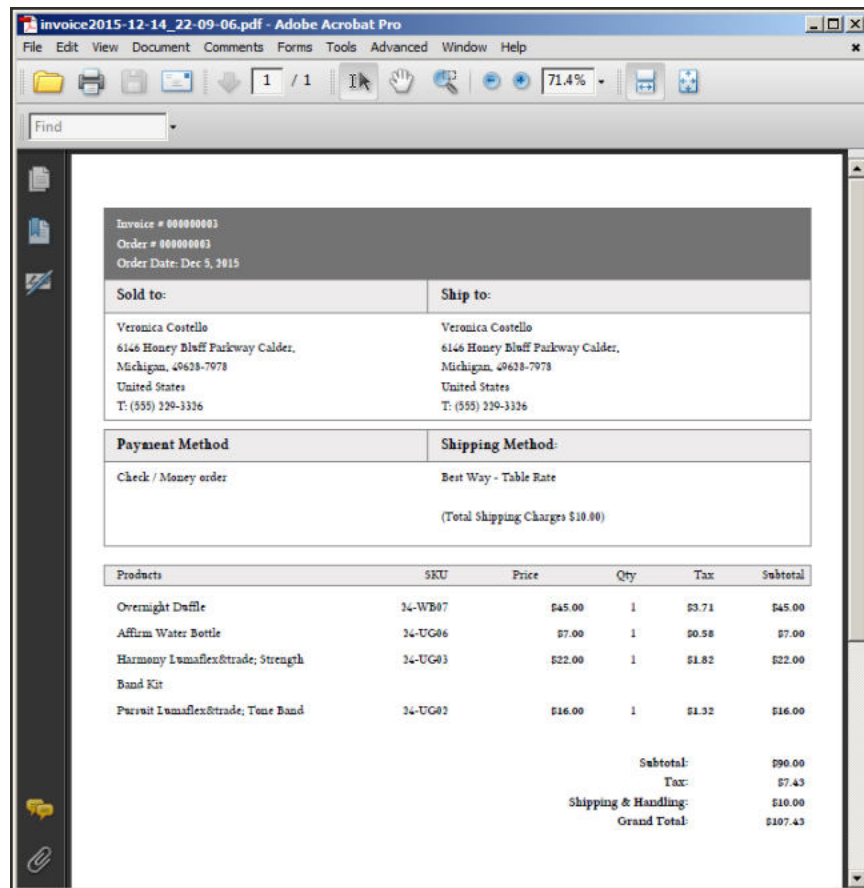
Subtotal	<b>\$97.00</b>
Shipping & Handling	<b>\$10.00</b>
<b>Grand Total</b>	<b>\$107.00</b>

*Completed Invoice*

### To print the invoice:

1. At the top of the workspace, tap **Print** to generate a PDF of the invoice
2. Do one of the following:
  - Send the PDF invoice to a printer.
  - Save the PDF file.

To customize the default invoice, see: [Preparing Your Invoice Logo](#).



*Default PDF Invoice*

## Payment Actions

PAYMENT ACTION	DESCRIPTION
Capture Online	When the invoice is submitted, the system captures the payment from the third-party payment gateway. You have the ability to create a credit memo and void the invoice.
Capture Offline	When the invoice is submitted, the system does not capture the payment. It is assumed that the payment is captured directly through the gateway, and you no longer have the option to capture this payment through Magento. You have the ability to create a credit memo, but you do not have the option to void the invoice. (Even though the order used an online payment, the invoice is essentially an offline invoice.)
Not Capture	When the invoice is submitted, the system does not capture the payment. It is assumed that you will capture the payment through Magento at a later date. There is a Capture button in the completed invoice. Before capturing, you are able to cancel the invoice. After capturing you are able to create a credit memo and void the invoice.

Do not select Not Capture unless you are certain that you are going to capture the payment through Magento at a later date. You will not be able to create a credit memo until the payment has been captured using the Capture button.

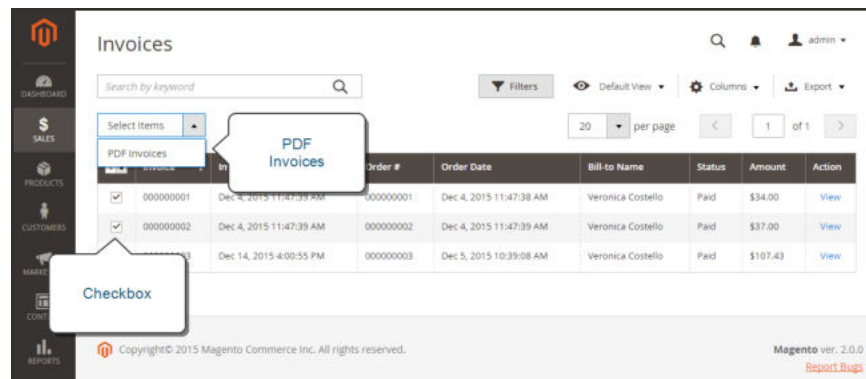
## Printing Multiple Invoices

Invoices can be printed individually or as a batch. However, before an invoice can be printed, it must first be generated for the order. To add your logo and address to the invoice, see: [Preparing Your Invoice Logo](#).

To view or print the PDF, you must have a PDF reader. You can download [Adobe Reader](#) at no charge.

### To print multiple invoices:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Invoices**.
2. In the **Invoices** grid, mark the checkbox of each invoice to be printed.
3. Set the **Actions** control to “PDF Invoices.”



### *Print Invoices*

The invoices are saved in a single PDF file that can be sent to a printer, or saved.

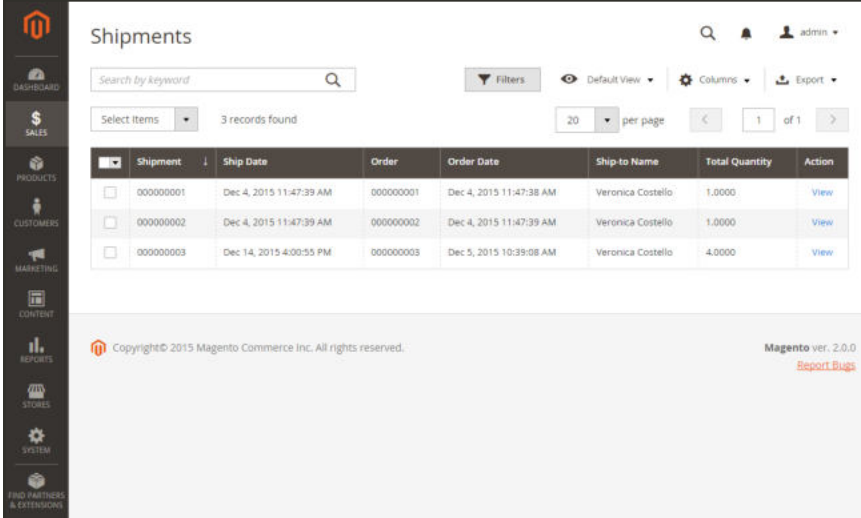


## CHAPTER 58:

# Shipments

The Shipments grid lists the shipment record of all invoices that have been prepared for shipping. A shipment record can be generated when an order is **invoiced**, or later.

Magento supports partial and complete order shipment, with additional options depending on **Inventory Management**, **Magento Shipping**, and third party extensions.



The screenshot shows the 'Shipments' grid in the Magento Admin interface. The grid has a search bar at the top with the text 'Search by keyword'. Below the search bar, there are controls for 'Filters', 'Default View', 'Columns', and 'Export'. A 'Select Items' dropdown and '3 records found' are also visible. The grid displays three shipment records with columns for Shipment, Ship Date, Order, Order Date, Ship-to Name, Total Quantity, and Action. The footer of the grid shows the copyright notice 'Copyright © 2015 Magento Commerce Inc. All rights reserved.' and the version 'Magento ver. 2.0.0' with a 'Report Bugs' link.

Shipment	Ship Date	Order	Order Date	Ship-to Name	Total Quantity	Action
<input type="checkbox"/> 000000001	Dec 4, 2015 11:47:39 AM	000000001	Dec 4, 2015 11:47:38 AM	Veronica Costello	1.0000	<a href="#">View</a>
<input type="checkbox"/> 000000002	Dec 4, 2015 11:47:39 AM	000000002	Dec 4, 2015 11:47:39 AM	Veronica Costello	1.0000	<a href="#">View</a>
<input type="checkbox"/> 000000003	Dec 14, 2015 4:00:55 PM	000000003	Dec 5, 2015 10:39:08 AM	Veronica Costello	4.0000	<a href="#">View</a>

*Shipments*

## Shipment Workflow

The value of the Status column in the Shipments grid reflects the state of the shipment as it moves through the workflow. If the Status column isn't currently visible in the Shipments grid, you can change the **grid layout** to include the column. Then, use the **grid controls** to filter the shipments by status.



**You receive your customer’s order.**

- A quote is generated for the shipment. (Status: Pending)
- The shipment is booked with a carrier. (Status: Fulfilled)



**Shipment is dispatched.**

- An attempt to **dispatch** is in progress (Status: Completing)
- The dispatch is complete. (Status: Completed)

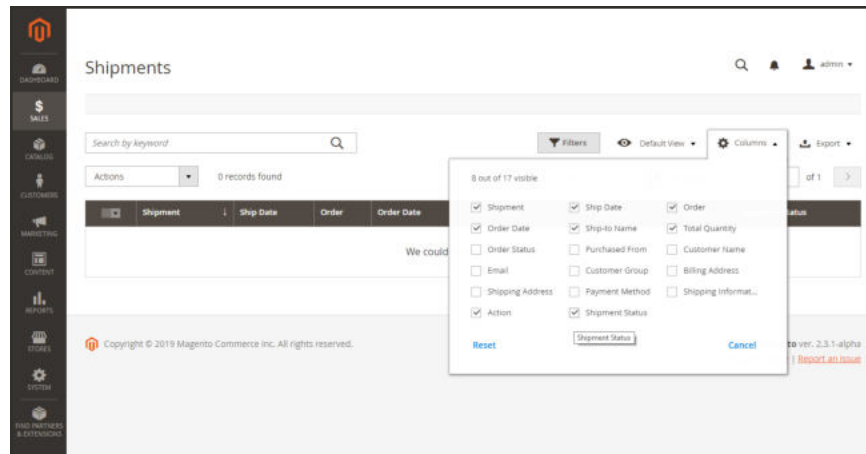


**Shipment canceled.**

- The shipment is canceled. (Status: Canceled)

**To show the Shipment Status column:**

1. On the Admin menu, choose **Sales**. Then, choose **Shipments**.
2. In the upper-right corner, tap the **Columns** ( ⚙ ) control.
3. Mark the **Shipment Status** checkbox.



*Show Shipment Status*

**Shipment Status**

STATUS	DESCRIPTION
Pending	A quote has been generated for the shipment, but it is not yet booked with a carrier.

### Shipment Status (cont.)

STATUS	DESCRIPTION
Fulfilled	A booking has been made for the shipment, and it is ready for dispatch.
Completing	An attempt to dispatch the shipment is in progress.
Completed	The dispatch is complete.
Canceled	The shipment has been canceled.

## Creating a Shipment

The following instructions walk you through the process of creating a shipment for Magento Shipping. If you have Inventory Management enabled, you may want to review [Creating Shipments with Inventory Management](#).

### To create a shipment:

1. On the Admin sidebar, choose **Sales**. Then, choose **Orders**.
2. Find the order in the grid, and open it.
3. If the order has been paid and invoiced, and is ready to ship, tap **Ship**.

The sections at the top of the shipment contain name and address and payment information from the sales order.

4. Complete each section of the shipment form as follows:

### Source Selection (Inventory Management)

If you have Inventory Management enabled, select a **source** (or location) and an amount of quantity to send per line item. For complete details, see [Creating Shipments with Inventory Management](#).

### Items Ordered

For each line item in the order, enter the **Qty Packed**.

Items Ordered					
Description	SKU	Weight	Qty Ordered	Qty Shipped	Qty Packed
Configurable Product 11	Configurable Product 11 - option 10	1 lb	1	0	1

*Items Ordered*



## Additional Information (Magento Shipping only)

Enter a **Shipment Reference** number to identify the shipment on the customer **manifest** and shipping labels. The default value is the Magento Customer ID, but can be any other value up to 15 characters.

## Route Information

Under **Route Information** do the following:

1. Choose the **Origin Location**.

For Magento Shipping, the default **location** is entered automatically, but can be overridden as necessary.

2. If applicable, mark the **International** checkbox.

For international shipments, the International Item Details and International Shipment Details sections appear in the form.



The screenshot shows a form titled "Route Information". It contains a dropdown menu labeled "Origin Location" and a checkbox labeled "International" with the text "This is an international route" next to it.

*Route Information*

## Packages

In the catalog database, make sure that the weight is entered correctly for all products to be shipped. If using Magento Shipping, also complete the **packaging seup**, as needed.

Magento Shipping presents a list of predefined carrier packaging after the carrier connects. The list includes all package types offered by the carrier, and the pricing and associated services are updated automatically from the carrier.

The package configuration grid lists only merchant-defined packaging. Carrier-specific packaging does not appear in the grid.

After you choose a package type, the length, width, height, and dimension unit are automatically entered, or “pre-filled.” The following determinations are made to calculate the package weight:

- The weight of the package, as specified in the catalog for each shippable product.
- The tare weight of the selected package type
- The sum of all product weights in the package, as well as the tare weight of the package.

An error occurs if the weight of all items in the package exceeds the maximum weight allowed for the package. The total weight is recalculated whenever the package type or quantity ordered changes. A warning appears below the Total Weight field, as a reminder to verify the values and make any changes necessary.

### To enter merchant-defined packaging:

Under **Packages** do the following:

1. Choose the **Package Type**.
  - If you choose a prepared package type profile, the measurements are entered automatically.
  - If you choose a Custom package, you must enter the **Length**, **Width**, and **Height** of the package. Then in the **Dim. Units** field, enter the number of dimensional units used by the package in the delivery vehicle or container.
2. Enter the **Weight** of the package. If necessary, set the **Weight Units** field to a different unit of measurement that is used for weight.
3. The Contents field displays the value of the Quantity Packed field under Items Ordered. To change the number of ordered items that are packed in the shipment, enter the updated value in the **Contents** field. The Quantity Packed value reflects the change.

Code	Package Type	Length	Width	Height	Dim. Units	Weight	Weight Units
A	Box	12	12	12	in	2	lb

Contents: Configurable Product 11 - option 10 - Configurable Product 11 \* 1

[Add Another Package](#)

*Packages*

4. To add another package to the shipment, do the following:
  - a. Click **Add Another Package**.
  - b. Complete the description of the package dimensions and weight.

### International Item Details (if applicable)

Complete the fields in the **International Item Details** section. If you need help, click the Help ( ? ) button, or refer to the Field Descriptions at the end of this topic.

*International Item Details*

### International Shipment Details (if applicable)

Complete the fields in the **International Shipment Details** section. If you need help, click the Help ( ? ) button, or refer to the Field Descriptions at the end of this topic.

*International Shipment Details*

### Add-Ons

The selection of value-added delivery options is determined by shipping method and carrier. Some orders shipped with Magento Shipping might have additional options.

1. To give the carrier permission to leave the delivery unattended, mark the **Unattended Delivery** checkbox.
2. To require the carrier to obtain a signature for the delivery, mark the **Signature Required** checkbox.

3. (Magento Shipping UPS - US only) If available and applicable, mark the **Adult Signature Required** checkbox.
4. (Magento Shipping UPS - US only) If you want to prevent the delivery from being redirected or rerouted by the recipient or driver, choose **Direct Delivery Only**.
5. (Magento Shipping UPS - US only) If needed for a time-critical delivery, mark the **Saturday Delivery** checkbox.
6. To identify the type of address, set **Destination Address Type** to one of the following:
  - Business
  - Residential
  - Post Office Box

The screenshot shows the 'Add-Ons' section of a shipping configuration interface. It contains the following elements:

- Unattended Delivery**  I give permission for this delivery to be left unattended
- Signature Required**
- Adult Signature Required**  Note: Currently supported by UPS only
- Direct Delivery Only**  Note: Currently supported by UPS only
- Saturday Delivery**  Show carrier services which deliver Monday through Saturday
- Destination Address Type**

*Add-Ons*

## Shipping Quotes

1. Do one of the following:
  - To use the customer's preferred method of shipping, mark the **Customer Preference** checkbox.
  - To override the customer's preferred method, clear the **Customer Preference** checkbox. Then, choose another method.
2. Tap **Get Quotes**.
3. In the list of quotes, select the quote you want to use.

The Book Shipment button in the header is now active. and the Shipping and Tracking Information is completed for the carrier.

Shipping Quotes

Quote from Shipping Experience  Use customer's choice

Standard

Carrier	Carrier Service	Cost	Actions
<input checked="" type="radio"/> FedEx	FedEx Ground®	USD13.73	<a href="#">Deselect</a>
<input type="radio"/> FedEx	FedEx Express Saver®	USD27.98	<a href="#">Select</a>
<input type="radio"/> FedEx	FedEx 2Day®	USD29.94	<a href="#">Select</a>
<input type="radio"/> FedEx	FedEx Priority Overnight®	USD51.22	<a href="#">Select</a>

Some errors have been returned while quoting. [Show Errors](#)

Shipping Quotes

### Shipping Comments

Enter **Comments** for the shipment, if needed.

Shipment Comments

Comments

Shipping Comments

5. When the shipment is ready, tap **Book Shipment**. Then, do the following:
  - a. To view the tracking information, click the **Tracking Number**.

Tracking Information

Tracking Number: 794651427350

Carrier: FedEx - FedEx Ground® - Package A

Status: awaiting pickup

Location	Date	Local Time	Description
Not Available	Dec 8, 2017	12:24 AM	awaiting pickup

[Close Window](#)

Tracking Information

- b. To send the package tracking information to the customer, tap **Send Tracking Information**.
    - c. When prompted, tap **OK** to confirm.

Payment & Shipping Method

**Payment Information**

Check / Money order  
The order was placed using EUR.

**Shipping and Tracking Information**

[Track this shipment](#)

**Magento Shipping - Standard US Shipping**  
Total Shipping Charges: **€5.00**

Carrier	Title	Number	Action
Magento Shipping	FedEx - FedEx Ground® - Package A	794651427350	

Custom Value

Shipping and Tracking Information

- 6. A message appears at the top of the page that the shipment has been sent, and the **Documentation** section appears in the shipment form, with a list of available printouts. The following example includes the High Value Report, which is available for Magento Shipping orders over \$999.00 (UPS - US only).
  - a. In the **Action** column, click the link to **Download** the package label for the shipment. Then, **Print** the label.

Documentation			
Document Name	Size	File Type	Action
High Value Report	A4	text/html	<a href="#">Download</a>
Package Label	A6	image/png	<a href="#">Download</a>

*Documentation*

- b. (Magento Shipping only) To print the **High Value Report**, click the **Download** link. Then, look for the text/html file in your browser’s download list.

**UPS CONTROL LOG**(This is a sample document)

DATE: 13 Sep 2018 UPS SHIPPER NO. X6756Y

**Please follow these important instructions for the UPS Control Log:**

1. Segregate the package(s) that are listed on this log.
2. Provide the UPS Control Log to a UPS Service employee.

TRACKING #	PACKAGE ID	REFERENCE NUMBER	DECLARED VALUE	CURRENCY
1ZX6756YT093556645	9355664		1380.00	USD

Total Number of Declared Value Packages = 1

---

RECEIVED BY \_\_\_\_\_ PICKUP TIME \_\_\_\_\_ PKGS \_\_\_\_\_


*High Value Report*

- 7. To print a packing slip for this shipment, click **Print** in the page header. Look for the PDF file in your browser’s download list.

**Button Bar**

FIELD	DESCRIPTION
Back	Closes the New Shipment form, and returns to the order
Book Shipment	Adds the shipment to the Dispatch grid.
Reset	Restores all fields to original values.

## Field Descriptions

FIELD	DESCRIPTION
<b>SHIPPING INFORMATION</b>	
Carrier	The name of the selected carrier
Title	A descriptive name assigned to the package by the carrier.
Number	The linked tracking number that is assigned to the package.
Action	 Deletes the carrier selection.
<input type="button" value="Add"/>	Add another carrier to the shipment.
<b>ADDITIONAL INFORMATION</b>	
Shipment Reference	(Magento Shipping only) Associates bookings between a carrier and a customer, and appears on shipping labels, manifest, and carrier Electronic Data Interchange (EDI) file, if applicable. The default value is the Magento Customer ID, and can be edited if required. Maximum length: 15 (upper- and lowercase characters, numbers 0-9)
<b>ROUTE INFORMATION</b>	
Origin Location	Displays a list of available locations.
International	If checked, identifies the shipment as an international shipment.
<b>ITEMS ORDERED</b>	
Description	The description of the item.
SKU	The Stock Keeping Unit of the item.
Weight	The weight of the item.
Qty Ordered	The quantity of the item that was ordered.
Qty Shipped	The quantity of items that have been shipped.
Qty Packed	The number of items included in this package.
<b>PACKAGES</b>	
Code	An automatically generated code that identifies the package.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Package Type	The type of package.
Length	The length of the package.
Width	The width of the package.
Height	The height of the package.
Dim. Units	The number of dimensional units used by the package in the delivery vehicle or container.
Weight	The package weight.
Weight Units	The unit of measurement used to describe the package weight.
Contents	A description of the package contents.
Add Another Package	Adds another package to the shipment.

**INTERNATIONAL ITEM DETAILS**

Unit of Measure	The unit of measurement used to describe the shipment.
Description	A description of the items in the shipment.
HS Code	Harmonized System Code A commodity classification developed by the World Customs Organization. Also known as the goods code, statistics code, statistics number, or tariff code. For example: 64-67 Footwear / Headgear
Weight	The weight of the shipment.
Weight Units	The unit of measurement used to describe the weight.
Country of Manufacture	The country where the items in the shipment were manufactured.
Country of Origin	The country where the shipment originated.
Declared Value	The declared value of the items in the shipment.

**INTERNATIONAL SHIPMENT DETAILS**

Signatory Title	The prefix of the name of the person who is authorized to sign for receipt of delivery.
-----------------	---



**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Signatory First Name	The First Name of the person who is authorized to sign for receipt of delivery.
Signatory Last Name	The Last Name of the person who is authorized to sign for receipt of delivery.
International Commerce Terms (Incoterms)	The code for the <b>International Chamber of Commerce</b> rule that applies to this shipment.
Export Category	The export category that applies to the shipment. Options: Commercial Documents Gift Humanitarian Non-sold Other Relocation Return and repair Sample
Export Reason	The reason for the export of the shipment.
Dutiable Shipment	Indicates if the shipment is subject to duty. Options: Yes / No
Invoice Number	The number of the associated invoice.
Invoice Date	The date of the associated invoice.
EDN	Export Declaration Number A number issued by the Australian Custom Service when a shipment is accepted for export.
EEL	Exemption and Exclusion Legend When shipping outside the U.S., you must provide either an EEL or a Proof of Filing Citation (PFC).
EEL	Electronic Export Information An electronic declaration of international export information.
ITN	International Transaction Number A number assigned to a shipment that confirms that the EEL was accepted and is on file in the Automated Export System (AES).

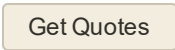
### Field Descriptions (cont.)

FIELD	DESCRIPTION
-------	-------------

#### ADD-ONS

Unattended Delivery	Indicates if the carrier can leave the package unattended at the destination address.
Signature Required	Indicates if a signature is required.
Adult Signature Required	(Magento Shipping UPS - US only) Indicates if an adult signature is required.
Direct Delivery Only	(Magento Shipping UPS - US only) Indicates if direct delivery is required. Direct Delivery ensures the package is delivered to the residential or business address. Direct delivery packages cannot be redirected by the recipient, or rerouted by the driver. Direct delivery packages do not require a signature, although you can choose to require one.
Saturday Delivery	(Magento Shipping UPS - US only) Indicates that the package can be delivered Monday through Saturday. When this option is chosen, only services that support Saturday delivery are listed.
Destination Address Type	Indicates the type of street address. Options: Residential Business Post office box

#### SHIPPING QUOTES

Quote from Shipping Experience	Use customer's choice	To override the default setting, clear the checkbox, and choose the type of quote.
		Generates a list of quotes for available carriers. the shipping information and tracking number are completed automatically after the carrier is selected.

#### SHIPMENT COMMENTS

Comments	Comments about the shipment are for internal use.
----------	---

#### DOCUMENTATION

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Package Label	PNG Download the shipment package label. Size: A6 (105 x 148 mm; 4.1 x 5.6 in.)
High Value Report	Text/HTML (Magento Shipping only) Download the UPS Control Log for US shipments over \$999.00. The report includes the tracking and reference numbers, declared value, and currency. The report includes a signature line to be completed by the delivery person, with pickup time and number of packages. Size: A4 (210 x 297 mm; 8.3 x 11.7 in)

## Canceling a Shipment

Before a shipment is dispatched to a carrier, it can be canceled by opening the order and navigating to the shipment, provided the carrier supports cancellations. Some carriers restrict or limit cancellations after a booking. For example, UPS allows cancellations, but requires that you wait 24 hours after the shipment is booked. If a shipment is canceled, the cancellation cannot be reversed. The only recourse is to recreate the order.

### To cancel a shipment:

1. On the Admin menu, choose **Sales**.
2. Find the order in the grid. Then in the **Action** column, choose **View**.
3. In the panel on the left, choose **Shipments**.

If the shipment can be canceled, a Cancel Shipment button appears in the button bar.

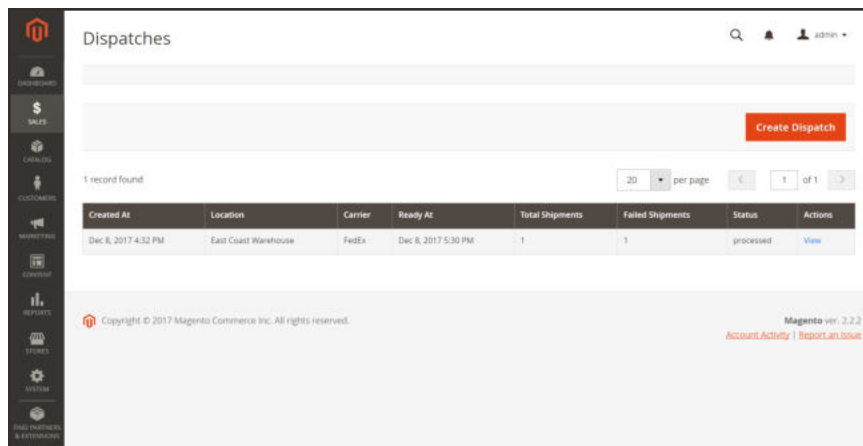
4. Tap **Cancel Shipment**. Then when prompted to confirm, tap **OK**.

The status of the shipment changes to “Canceled.”

If the carrier does not support cancellations, an error message appears that explains why the shipment couldn’t be canceled.

## Dispatches

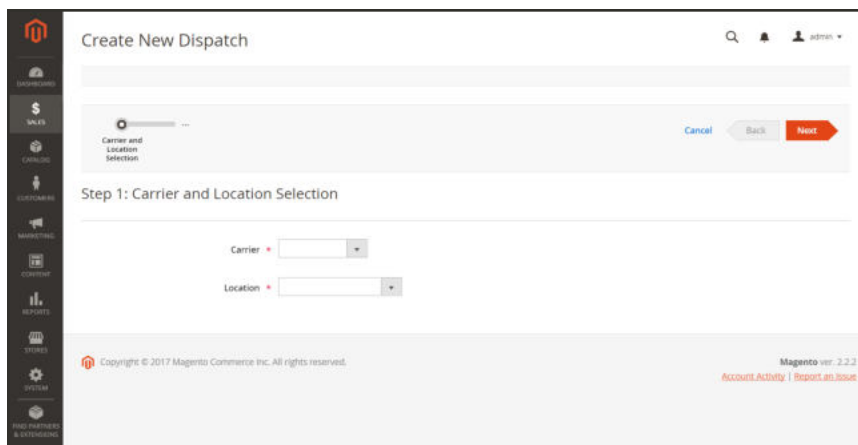
If Magento Shipping is enabled, the Dispatches grid lists all shipments that are ready to ship. For each scheduled pickup, you can create a Dispatch and printed manifest that includes each package that is to be included, per carrier.



*Dispatches*

### To create a dispatch:

1. On the Admin sidebar, choose **Sales**. Then, choose **Dispatches**.
2. Click **Create Dispatch**. Then, do the following:
  - a. Choose the **Carrier**.
  - b. Choose the **Location** where the packages in the manifest are to be picked up. Then, tap **Next**.

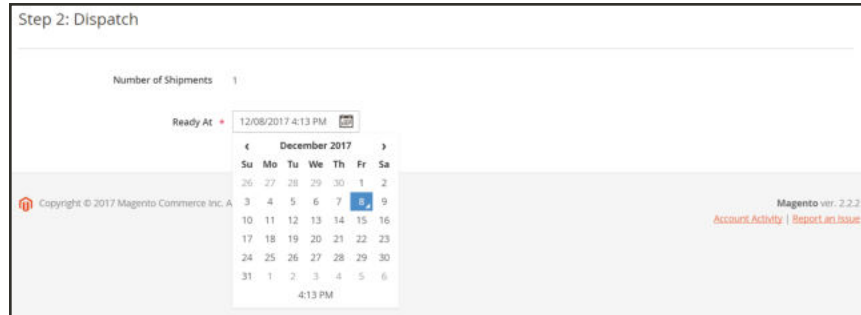


*Carrier and Location Selection*

3. To set the date and time of the scheduled pick up, do the following.

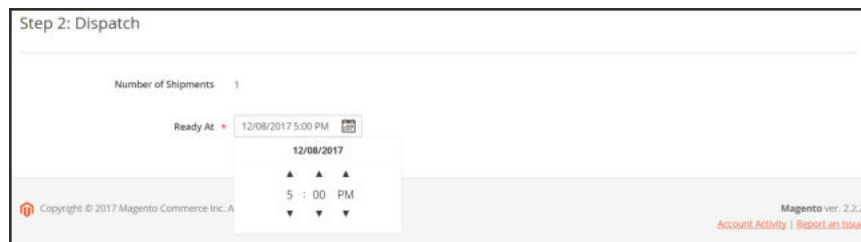
- a. In the **Ready At** field, choose the date from the calendar.

The date and time must be at least 30 minutes in the future.



*Dispatch Date*

- b. Click the **Time** below the calendar, and choose the scheduled time of the pickup.



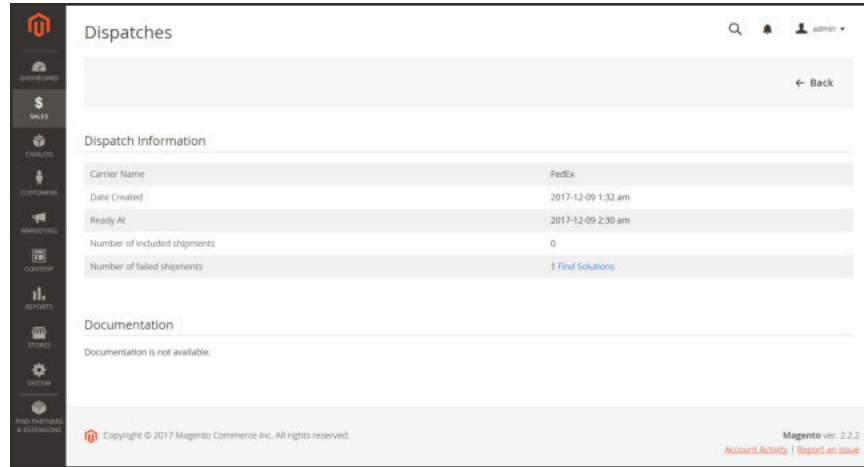
*Dispatch Time*

- 4. Tap **Finish** to schedule the dispatch.

The dispatch now appears in the Dispatches grid.

**To view the dispatch detail:**

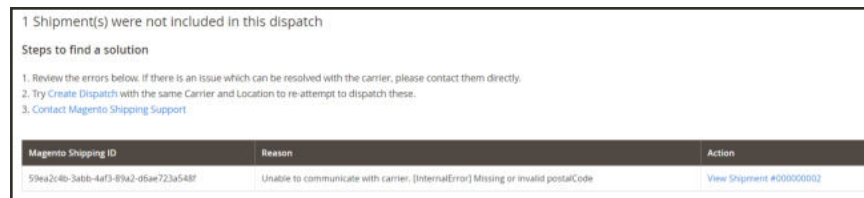
1. Find the dispatch in the grid. Then in the **Action** column, click **View**.



*Dispatch Information*

2. If a problem is encountered while communicating with the carrier, the report will include a failed shipment. Click **Find Solutions** for more information.

In this case, the problem was caused by a missing or invalid postal code in our sample data.



*Find a Solution*

## Batches

Batch processing allows you to process a large number of shipments in a fraction of the time it would take to process the shipments manually. Unlike the standard process to create a **shipment**, the batch process leverages the Temando API, which is **synchronized** to your Magento installation.

At this time, batch processing is available only for domestic shipments.

The Batches grid lists the available **Magento Shipping** batches, the number of shipments in each, and their status. You can view the detail of a single batch, print packing slips, and shipping labels. The grid at the bottom of the page lists the shipments in the batch.

Created At	Total No. of Shipments	No. of Shipments Booked Successfully	No. of Shipments Failed to Book	Status	Actions
Sep 12, 2018 8:28 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 2:37 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 2:23 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 2:22 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 2:21 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 2:19 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 1:54 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 1:47 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 1:42 AM	1	1	0	processed	<a href="#">View</a>
Sep 12, 2018 1:35 AM	1	0	1	processed	<a href="#">View</a>
Sep 12, 2018 1:34 AM	1	0	1	processed	<a href="#">View</a>
Sep 12, 2018 1:31 AM	1	0	1	processed	<a href="#">View</a>

*Batches***To view batch detail:**

1. On the Admin sidebar, choose **Sales**. Then, choose **Batches**.
2. Find the batch in the list. Then in the **Actions** column, click **View**.

← Back [Print All Packing Slips](#)

**Warning:** There are Shipments in this Batch that are still being created. Please check Back soon to view these Shipments.

**Batch Information**

Date Created	2018-09-12 8:28 am
Number of Shipments booked successfully	1
Date Updated	2018-09-12 8:28 am
Batch ID	b53db66a-e450-44d7-ac8e-a9b1bc15abfa
Batch Status	processed

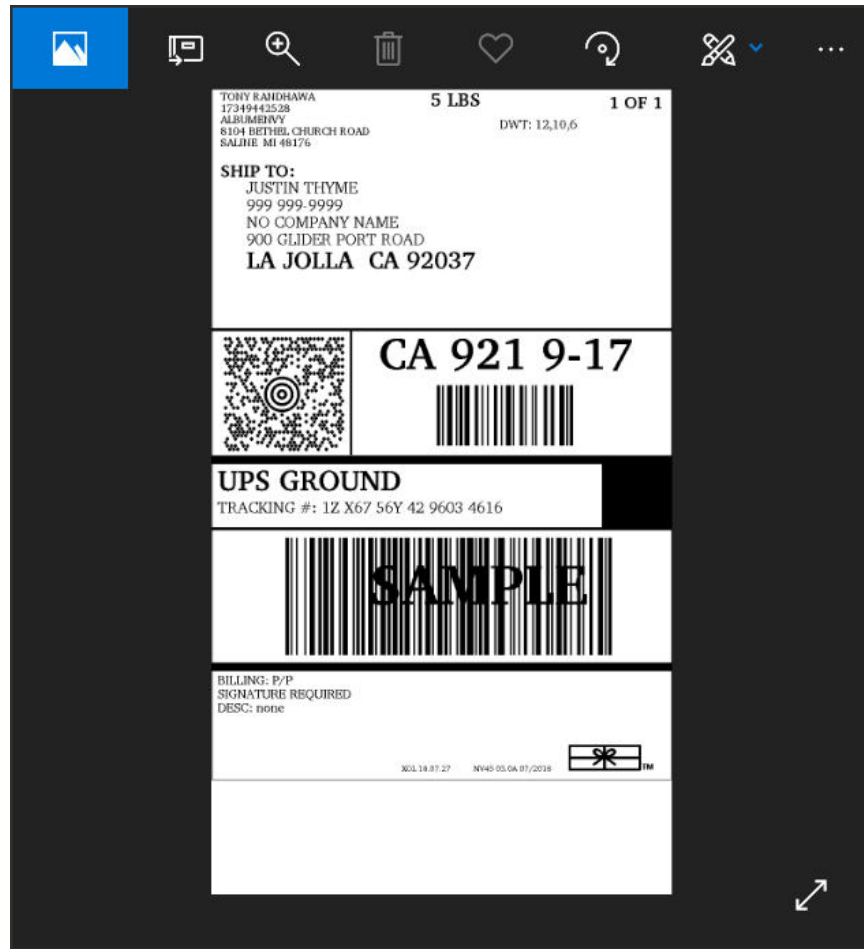
**Documentation**

Shipping labels for each shipment are consolidated into a single compressed file. [Download Documentation](#)

Shipment	Ship to Name	Destination Address	Items Ordered	Action
----------	--------------	---------------------	---------------	--------

*Batch Detail*

3. To print packing slips for each shipment in the batch, click **Print All Packing Slips**.
4. To print shipping labels, do the following:
  - a. Under **Documentation**, click **Download Documentation**.
  - b. Look for the ZIP file of labels in your browser's list of downloads.
  - c. Click the download file to view the individual PNG files. Then, open and print each label.



*Shipping Label*

**To view shipment detail:**

1. Find the shipment in the grid at the bottom of the page
2. In the **Action** column, click **View**.

**Column Descriptions**

COLUMN	DESCRIPTION
Created At	The date and time the batch was created.
Total No. of Shipments	The number of shipments in the batch.
No. of Shipments Booked Successfully	The number of shipments in the batch that booked properly.
No. of Shipments Failed to Book	The number of shipments that failed to book properly. To learn more, see: <a href="#">Troubleshooting</a> .



### Column Descriptions (cont.)

COLUMN	DESCRIPTION
Status	The current status of the batch.
Actions	View View the batch detail.

## Creating a Batch

Orders that are ready to ship with Magento Shipping can be booked together as multiple shipments, and processed as a **batch**. Each shipment includes a detailed description of the package(s) to be included, with additional instructions for the carrier. The shipment is processed according to the shipping experience rule of your choice. Documentation, including shipping labels, is generated for each package, and is available for download.

### Before you begin...

Verify that **Magento Shipping** is enabled with valid API credentials, and that the **Advanced** section is complete to synchronize your Magento installation with the Temando API.

### Step 1: Create a Shipping Experience Rule

In this step, you will create a Batch Fulfillment Rule to automate the batch processing of shipments. To learn more, see: [Shipping Experience Rules](#).

1. In the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Experiences**.
2. Tap **Create New Experience**. Then, do the following:
  - a. Enter a descriptive **Name** for the new rule.
  - b. Set the **Status** of the rule to “Production.”
3. Scroll down to the **Batch Fulfillment Rules** section. Then, tap **Create Rule**, and do the following:



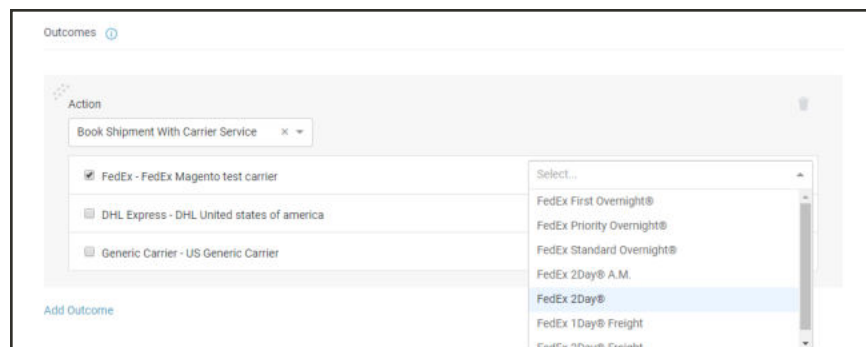
*Batch Fulfillment Rules*

- a. Enter a brief **Description** of the rule that states its purpose and the conditions that trigger the rule.
- b. Because this rule is to run every time, accept the default **Condition** value of “Always.”

*Condition*

- c. In the **Outcomes** section, set **Action** to one of the following:
- Book Shipment with Cheapest Carrier Service
  - Book Shipment with Carrier Service

Then, choose the carrier(s) and services that you want to use for fulfilling the orders in the batch.

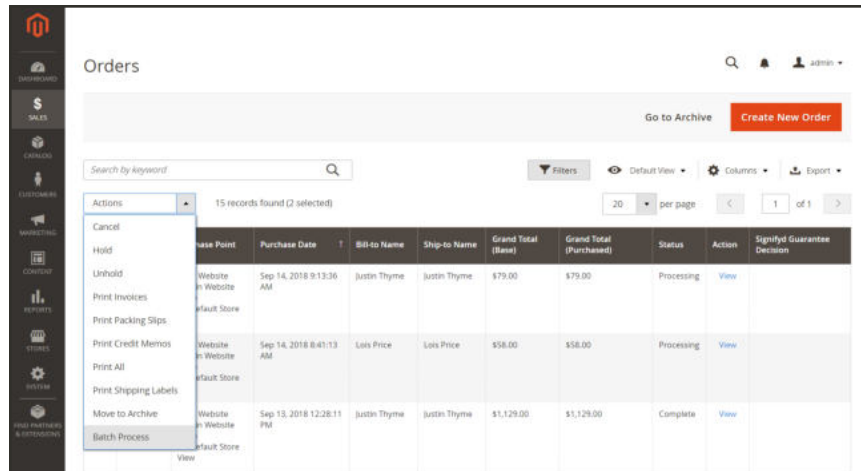
*Outcome*

4. When complete, tap **Save**.

## Step 2: Process a Batch of Orders

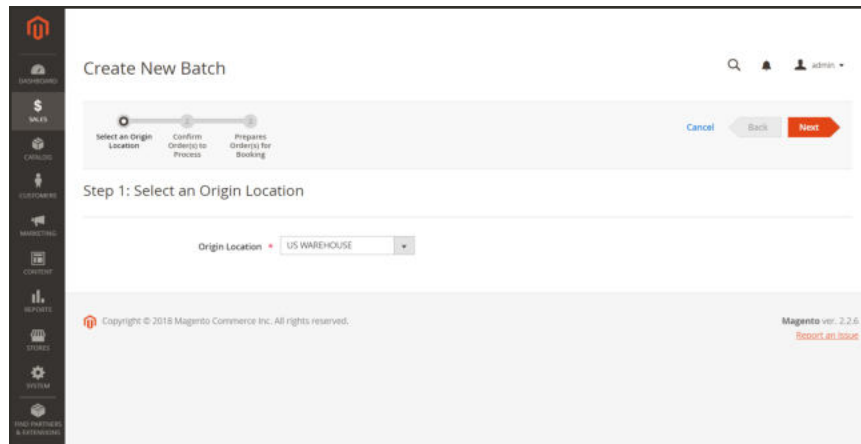
A batch of orders can be processed if there is one or more in the Orders grid with the status of “Pending.”

1. On the Admin sidebar, choose **Sales**. Then choose **Orders**, and do the following:
  - a. In the **Orders** grid, mark the checkbox of each order that you want to include in the batch.
  - b. Set the **Actions** control to “Batch Process.”



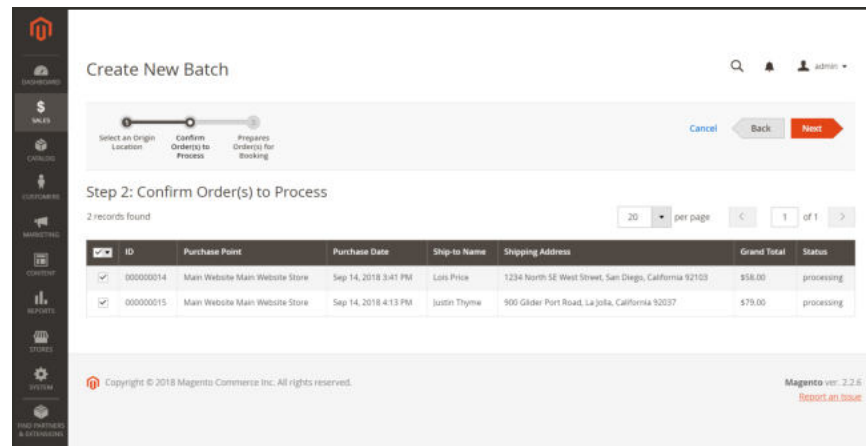
*Action - Batch Process*

2. Follow the progress indicator at the top of the page, as you complete the following:
  - a. To complete **Step 1**, choose the **Origin Location** to establish where the orders to be shipped are booked. Then in the upper-right corner, tap **Next**.



*Step 1: Choose the Origin*


- b. To complete **Step 2**, review the orders in the grid. If necessary, clear the checkmark of any order that you do not want to include in the batch. Then, tap **Next**.



*Step 2: Confirm Shipments(s) to Process*

- c. In **Step 3**, you will complete the detail information for each order in the batch.

The packaging of each item must be defined before the quoting and booking processes can take place. The total weight is calculated based on the weight that is specified in the product record. When a package type is specified, the calculated weight is updated to include the weight of the packaging, if available.

- d. This page is wider than most pages, and includes a section for each order in the batch. Do the following to describe each package in each order:
- Choose the **Package Type**.
  - Enter the **Total Weight**.
  - Choose the **Weight Unit**.
  - Enter the number of each item that is included in the package.
- e. To ship the order in multiple packages, click **Add Another Package**. Then, complete the previous step to describe the additional package and its contents.
- f. If you need to remove a package, click the **Delete** icon (  ) to the right of the Weight Unit field.

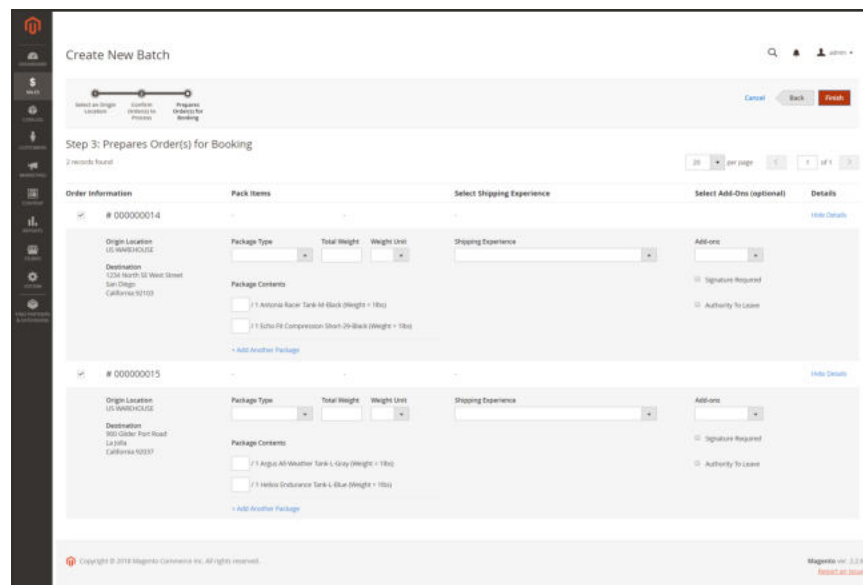
Items in a removed package are not automatically restored to the previous package. In such a case, it is necessary to update the Package Contents field manually, or add another package.

3. Choose the applicable **Shipping Experience**.
4. Do the following to specify any optional delivery options:

- a. Under **Add-ons**, choose one of the following types of destination address:
  - Business
  - Residential
  - Post office box
- b. Mark the checkbox of any additional delivery options that apply to the shipment.

The selection of options depends on the carrier and service.

- c. To keep the workspace uncluttered, you can click **Hide Details** after you prepare each order in the batch for booking.



Step 3: Prepare for Booking

- 5. When complete, tap **Finish**.

The new batch appears at the top of the Batches grid, with the status, “Created.” In the grid, the checkbox is marked for all orders that are to be included in the batch. To remove an order from the batch, simply clear its checkbox.

Batch booking times can vary, depending on the quantity of bookings within a batch, and the carriers used. The status of each batch in the list is updated automatically as batches are booked. A batch can have one of three possible states:

- Created                      Indicates a new batch that was just created.
- Processing                   Indicates that the shipments for the orders in the batch are still in process, and the booking request is sent to the carrier.
- Processed                    Indicates that the batch process has run the booking requests, and response has been received from the carrier(s).

If an order was not successfully booked, it can be processed again during the standard workflow, either individually, or as part of a batch.

Created At	Total No. of Shipments	No. of Shipments Booked Successfully	No. of Shipments Failed to Book	Status	Actions
Sep 11, 2018 2:40 PM	2	0	0	created	<a href="#">Refresh</a>
Sep 11, 2018 6:33 AM	1	0	1	processed	<a href="#">View</a>
Sep 11, 2018 5:45 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 5:44 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 5:43 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 5:41 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 5:38 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 5:17 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 5:14 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 5:07 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 4:47 AM	1	1	0	processed	<a href="#">View</a>
Sep 11, 2018 4:40 AM	1	1	0	processed	<a href="#">View</a>

*New Batch*

### Step 3: View the Batch and Print Documentation

When a batch receives responses from all of the carriers regarding booking requests, the batch booking request process ends, and the results of the shipment bookings appear in the list. If a batch has shipments that failed to book, you can view the batch to investigate further.

1. In the **Actions** column, click **View** to examine the batch or to access the shipment documentation.
2. Do one of the following to print the documentation associated with the batch:
  - Click **Print All Packing Slips**.
  - Click **Download Documentation Links**.

All of the associated documentation is collated into a single file for you to print. Downloaded documentation is saved as a compressed zip file, and each individual document is saved as a .PNG file.

### Step 4: Dispatch

The final step in the fulfillment process is to create a dispatch and printed manifest. To continue, see: [Dispatches](#).

#### Field Descriptions

FIELD	DESCRIPTION
-------	-------------

#### STEP 1: SELECT AN ORIGIN LOCATION

**Field Descriptions (cont.)**

FIELD	DESCRIPTION	
Origin Location	Identifies where the products to be shipped are located.	
<b>STEP 2: CONFIRM ORDER(S) TO PROCESS</b>		
(checkbox)	Confirms each order to be included in the batch.	
<b>STEP 3: PREPARE ORDER(S) FOR BOOKING</b>		
(checkbox)	Confirms each shipment to be booked.	
Pack Items	Package Type	Specifies the type of packaging to be used for the shipment.
	Total Weight	The total weight of the package.
	Weight Unit	The unit of measurement used for the weight.
	Package Contents	The number of units from each line item that are in the package.
	Add Another Package	If the order must be shipped in multiple packages, shows fields for the additional package and contents description.
Shipping Experience	Determines the <b>shipping experience</b> rule that is to be used for the shipment.	
Add-ons	(Destination Address Type)	Specifies the type of address. Options: Business Residential Post office box
	Unattended Delivery	Indicates if the carrier can leave the package unattended at the destination address.
	Signature Required	Indicates if a signature is required.
	Adult Signature Required	(UPS - US only) Indicates if an adult signature is required.

### Field Descriptions (cont.)

FIELD	DESCRIPTION
Direct Delivery Only	(UPS - US only) Indicates if direct delivery is required. Direct Delivery ensures the package is delivered to the residential or business address. Direct delivery packages cannot be redirected by the recipient, or rerouted by the driver. Direct delivery packages do not require a signature, although you can choose to require one.
Saturday Delivery	(UPS - US only) Indicates that the package can be delivered Monday through Saturday. When this option is chosen, only services that support Saturday delivery are listed.

### Error Messages

TYPE	DESCRIPTION
Errors when orders are loaded for a batch	<p>Indicates an error occurred when the order information was retrieved. This error is generally encountered with orders that were not created with Magento Shipping.</p>
Errors when processing a batch	<p>Carriers may not be able to service the specified shipping requirements when quoting, or there may be issues with the API, or the value entered in the configuration. All errors returned for communication with the carrier are listed in the Errors block above the related order. The error message indicates which carrier services has issues with the current shipping configuration.</p> <p>Click <b>Show Errors</b> to see all errors returned.</p>
Failed bookings in a batch	<p>If a booking with a carrier fails, the reason for the failure must be understood to ensure a successful booking next time.</p> <p>To view the causes and identify possible solutions, first view the batch. Then next to the number of failed shipments, click <b>Find Solutions</b>.</p> <p>The Find Solutions page describes the order that failed to book, and provides the known reason for failure, or the error that was returned by the platform or carrier.</p>



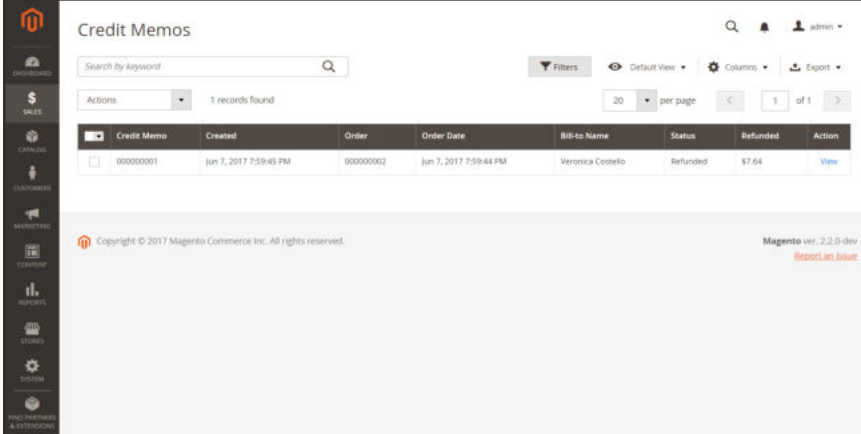


## CHAPTER 59:

# Credit Memos

A credit memo is a document that shows the amount that is due the customer for a full or partial refund. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch. Before a credit memo can be printed, it must first be generated for the order. The credit memo grid lists the credit memos that have been issued. to customers.

The methods that are available to issue refunds depends on the payment method that was used for the order. Orders that were paid by credit card through a payment gateway can be refunded online, by the payment processor. Orders that were paid **COD** or by **check or money order** are refunded offline.

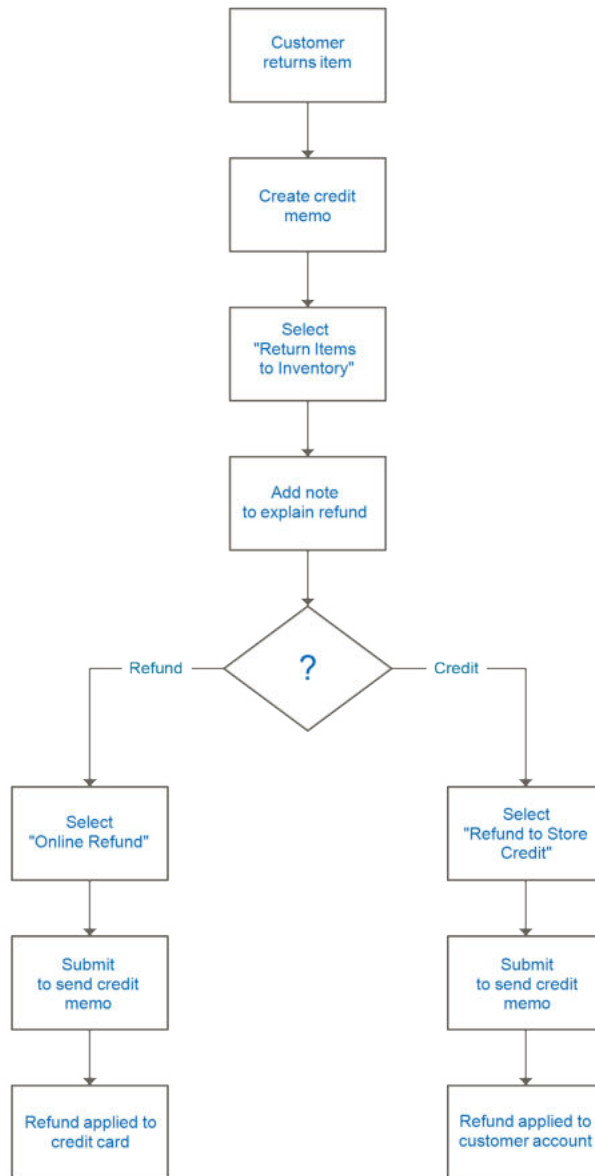


Credit Memo	Created	Order	Order Date	Bill-to Name	Status	Refunded	Action
00000001	Jun 7, 2017 7:59:45 PM	00000002	Jun 7, 2017 7:59:44 PM	Veronica Costello	Refunded	\$7.64	<a href="#">View</a>

Copyright © 2017 Magento Commerce Inc. All rights reserved. Magento ver: 2.2.0-dev [Report an Issue](#)

*Credit Memos*

# Product Return Workflow

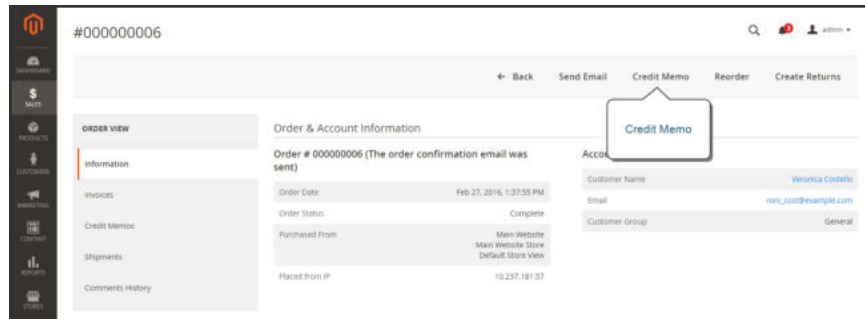


*Product Return Workflow*

## Issuing a Credit Memo

Before a credit memo can be printed, it must first be generated for the order. Any credit memo with a **status** of “open” has an outstanding refund due.

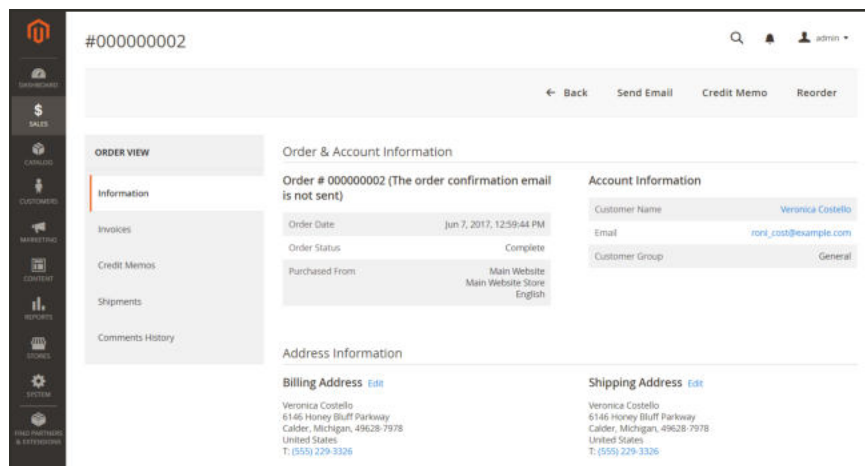
If using **Vertex Cloud**, see the **Vertex Settings** configuration section for information about issuing refunds for sales orders that are invoiced when the status is either “Suspected Fraud” or “Canceled.”



Create Credit Memo

### To issue a credit memo:

1. On the Admin sidebar tap **Sales**. Then, choose **Orders**.
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order.
3. In the button bar at the top of the page, tap **Credit Memo**. (The button appears only after an order is invoiced.)



Create Credit Memo

The New Credit Memo page looks similar to the completed order page, with an Items to Refund section that lists each item from the invoice.

Items to Refund								
Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Endeavor Daytrip Backpack	\$33.00	Ordered 3	<input checked="" type="checkbox"/>	<input type="text" value="3"/>	\$99.00	\$0.00	\$0.00	\$99.00
SKU: backpack		Invoiced 3						
		Shipped 3						

### *Items to Refund*

If an online payment method was used, you will not be able to edit these fields.

**4.** Do one of the following:

- If the product is to be returned to inventory, mark the **Return to Stock** checkbox. With Magento Inventory Management enabled, the inventory quantity returns to the source that sent the shipment.
- If the product will not be returned to inventory, leave the checkbox blank.

The Return to Stock checkbox appears only if inventory Stock Options are set to “Decrease Stock When Order Is Placed.”

**5.** Complete the following:

- a.** In the **Qty to Refund** box, enter the number of items to be returned. Then, press the **Enter** key to record the change. The Update Qty’s button becomes active.
- b.** Enter **0** for the **Qty to Refund** of any items that are not to be refunded.
- c.** Tap **Update Qty’s** to recalculate the total. (The amount to be credited cannot exceed the maximum amount that is available for refund.)

**6.** In the **Refund Totals** section, do the following, as applicable:

- a.** In the **Refund Shipping** field, enter any amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.
- b.** In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order (shipping, items, or tax). The amount entered cannot raise the total refund higher than the paid amount.
- c.** In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.
- d.** If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer’s account balance.
- e.** To add a comment, enter the text in the **Credit Memo Comments** box.

- f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.
- g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

The status of a credit memo notification appears in the completed credit memo next to the credit memo number.

Order Total	
Credit Memo Comments	
Comment Text	<input type="text"/>
Refund Totals	
Subtotal	\$0.00
Refund Shipping	0
Adjustment Refund	0
Adjustment Fee	0
Tax	\$0.00
<b>Grand Total</b>	<b>\$0.00</b>
<input type="checkbox"/> Append Comments <input type="checkbox"/> Email Copy of Credit Memo	
<b>Refund Offline</b>	

*Refund Totals*

- 7. To complete the process and generate the credit memo, choose one of the following refund option buttons, according to the payment type:
  - Refund Offline
  - Refund Online
- 8. To add a comment to the completed credit memo, scroll down to the Comments History section, and enter the comment in the box. A history of all activity related to the order is listed below.
  - To send the comment to the customer by email, mark the **Notify Customer by Email** checkbox.
  - To post the comment in the customer’s account, mark the **Visible on Frontend** checkbox.

Then, tap **Submit Comment** .

- 9. In the panel on the left, choose **Credit Memos**. Any credit memos that are associated with this order appear in the list.

## Field Descriptions

FIELD	DESCRIPTION
<b>ORDER &amp; ACCOUNT INFORMATION</b>	
Order Number	The order number appears in the Order & Account Information, followed by a note that indicates if the confirmation email was sent.
Order Date	The date and time the order was placed.
Order Status	Indicates the order status as “Complete.”
Purchased From	Indicates the website, store, and store view where the order was placed.
Placed from IP	Indicates the IP address of the computer from which the order was placed.
<b>Account Information</b>	
Customer Name	The name of the customer who placed the order. The Customer Name is linked to the customer profile.
Email	The email address of the customer. The email address is linked to open a new email message.
Customer Group	The name of the customer group to which the customer is assigned.
<b>ADDRESS INFORMATION</b>	
Billing Address	The name of the customer who placed the order, followed by the billing address, telephone number and <b>VAT</b> , if applicable. The telephone number is linked to autodial on a mobile device.
Shipping Address	The name of the person to whose attention the order should be shipped, followed by the shipping address and telephone number. The telephone number is linked to autodial on a mobile device.
<b>PAYMENT &amp; SHIPPING METHOD</b>	
Payment Information	The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order.
Shipping & Handling Information	The shipping method to be used, and any handling fee that is applicable.

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
<b>ITEMS TO REFUND</b>	
Product	The product name, SKU, and options if applicable.
Price	The purchase price of the item.
Qty	The quantity ordered.
Return to Stock	Checkbox that indicates if the returned item is to be returned to stock.
Qty to Refund	Indicates the number of units returned of the product.
Subtotal	The subtotal is the purchase price multiplied by the quantity of product units returned.
Tax Amount	The amount of tax that applies to the returned item as a decimal value.
Tax Percent	The percentage of tax applied to the returned item as a percentage.
Discount Amount	Any discount that applies to the returned item.
Row Total	The line item total, including applicable taxes that are due for the returned product level, less discounts.
<b>ORDER TOTAL</b>	
<b>Credit Memo Comments</b>	
Comment Text	A text box that is used to enter a comment to the customer about the credit memo.
<b>Refund Totals</b>	
Refund Shipping	The shipping amount to be refunded.
Adjustment Refund	An amount that is added to the total amount refunded as an additional refund that does not apply to any particular part of the order, such as shipping, items, or tax. The amount entered cannot raise the total refund higher than the amount paid.
Adjustment Fee	An amount that is subtracted from the total amount refunded, such as a restocking fee, or an amount that is related to gift options.
Grand Total	The total amount to be refunded



**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Append Comments	Checkbox that determines if comments are included in the credit memo.
Email Copy of Credit Memo	Checkbox that determines if a copy of the credit memo is emailed.

**REFUND BUTTONS**

The payment method used for the order determines that refund buttons that are available for a credit memo.

**Refund Online**

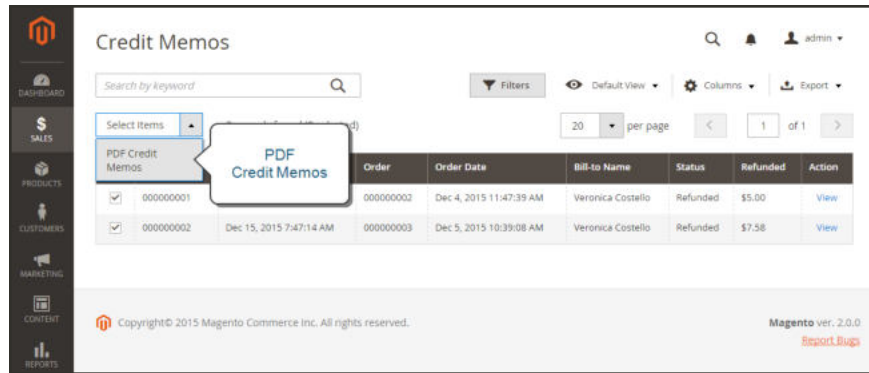
If the original purchase was paid by credit card through a payment gateway, the refund amount is managed by the payment processor. To manage refunds, see the documentation provided by your payment provider.

**Refund Offline**

If the original purchase was paid by check or money order, the refund is paid directly to the customer, by issuing a check, gift card, or cash if you have a brick and mortar storefront. The credit memo serves as a record of the offline transaction.

## Printing Credit Memos

To print or view the completed credit memo, you must have a PDF reader installed on your computer. You can download [Adobe Reader](#) at no charge.



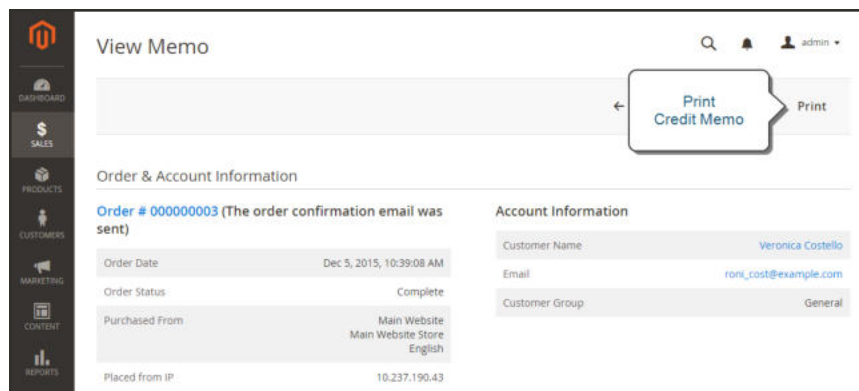
*Credit Memos*

### To print a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.
2. Use one of the following methods to print the credit memo:

### Method 1: Print current credit memo

1. In the grid, open the credit memo.
2. Tap **Print**.



*Print Credit Memo*

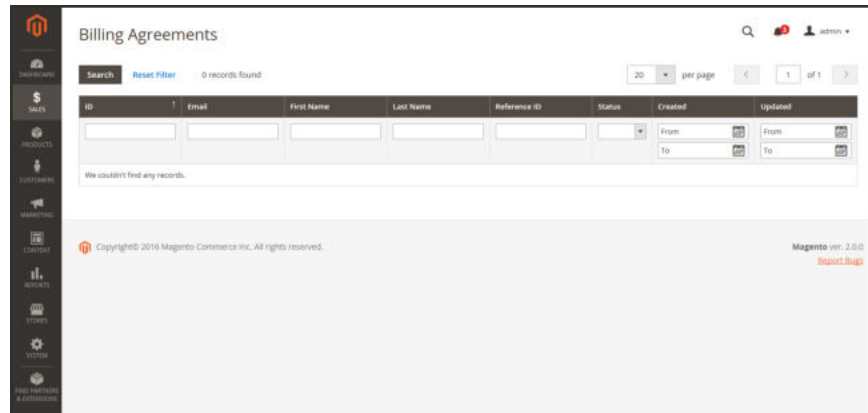
### Method 2: Print multiple credit memos

1. In the list, mark the checkbox of each credit memo that you want to print.
2. Set the **Actions** control to “PDF Credit Memos. Then, tap **Submit**.
3. When prompted, do one of the following:
  - To save the document, tap **Save**. Then, follow the prompts to save the file to your computer. When the download is complete, open the PDF in Adobe Reader, and print the document.
  - To view the document, tap **Open**. The printed-ready PDF credit memo opens in Adobe Reader. From here, you can either print the credit memo or save it to your computer.

## CHAPTER 60:

# Billing Agreements

The Billing Agreements grid lists all **billing agreements** between your store and its customers. The store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer's billing agreements. A canceled billing agreement can be deleted only by the store administrator.



*Billing Agreements*



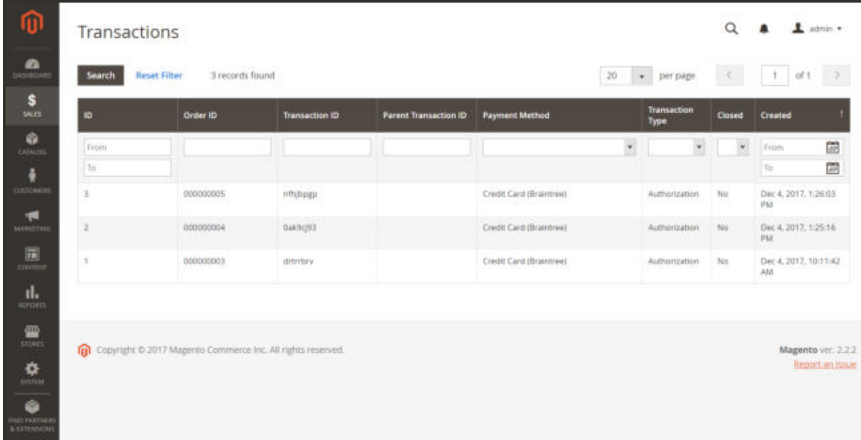
## CHAPTER 61:

# Transactions

The Transactions grid lists all payment activity that has taken place between your store and a payment system, and provides access to more detailed information.

### To view transactions:

On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Transactions**.



The screenshot shows the Magento Admin interface for the Transactions grid. The page title is "Transactions" and it shows 3 records found. The grid has columns for ID, Order ID, Transaction ID, Parent Transaction ID, Payment Method, Transaction Type, Closed, and Created. There are three records listed, all with a Payment Method of "Credit Card (Braintree)" and a Transaction Type of "Authorization".

ID	Order ID	Transaction ID	Parent Transaction ID	Payment Method	Transaction Type	Closed	Created
3	000000005	nfhjtpgi		Credit Card (Braintree)	Authorization	No	Dec 4, 2017, 1:26:03 PM
2	000000004	0akhj93		Credit Card (Braintree)	Authorization	No	Dec 4, 2017, 1:25:16 PM
1	000000003	dtrtrbv		Credit Card (Braintree)	Authorization	No	Dec 4, 2017, 10:11:42 AM

*Transactions*

# Payments

## Contents

In this section of the guide, you will learn about the [Recommended Solutions](#) payment methods, services, and gateways that you can make available to your customers, and how to configure them.

- [PayPal Express Checkout](#)
- [PayPal In-Context Checkout](#)
- [PayPal Billing Agreements](#)
- [PayPal Settlement Reports](#)
- [Braintree](#)

### Other PayPal Solutions

- [PayPal Payments Advanced](#)
- [PayPal Payments Pro](#)
- [PayPal Payments Standard](#)
- [PayPal Payflow Pro](#)
- [PayPal Payflow Link](#)

### PayPal Reference

- [PayPal Business Account](#)
- [PayPal Credit](#)
- [PayPal Fraud Management Filter](#)
- [PayPal by Country](#)

### Other Payment Solutions

- [Authorize.Net Direct Post \(Deprecated\)](#)
- [Authorize.Net](#)

### Basic Payment Methods

- [Check / Money Order](#)
- [Cash On Delivery](#)
- [Bank Transfer](#)
- [Purchase Order](#)
- [Zero Subtotal Checkout](#)

### Fraud Protection





## CHAPTER 62:

# Recommended Solutions

The following payment solutions provide an easy way for merchants who are just starting out to accept online payments. As your business grows, you can combine these with additional PayPal payment solutions.



### PayPal Express Checkout

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Use PayPal Express Checkout as a standalone option, or combine it with another PayPal payment solution.



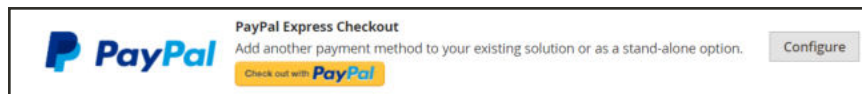
### Braintree

---

Braintree allows you to accept credit/debit cards and PayPal without any setup or monthly fees. Your customers never leave your store to complete the purchase.

## PayPal Express Checkout

PayPal Express Checkout helps boost sales by giving your customers the ability to pay by credit card or from the security of their personal PayPal accounts. During checkout, the customer is redirected to the secure PayPal site to complete the payment information. The customer is then returned to your store to complete the remainder of the checkout process. Choosing Express Checkout adds the familiar PayPal button to your store, which has been reported to increase sales.\*



Customers with current PayPal accounts can make a purchase in a single step by clicking the “Check out with PayPal” button. Express Checkout can be used as a standalone, or in combination with one of PayPal’s All-In-One solutions. If you already accept credit cards online, you can offer Express Checkout as an additional option to attract new customers who prefer to pay with PayPal.

PayPal has deprecated support for the sale of digital goods through PayPal Express Checkout, and recommends that you use either [PayPal Payments Standard](#) or any other PayPal payment gateway to process any order that includes [virtual products](#).

## Requirements

- Merchant: [Personal PayPal Account](#)
- Customer: [Personal PayPal Account](#)

## Checkout Workflow

Unlike other payment methods, PayPal Express Checkout allows the customer to check out at the beginning of the usual checkout workflow from the product page, the mini shopping cart, and shopping cart.

- 1 Customer Places Order.** The customer taps the “Check out with PayPal” button. .
- 2 Customer Is Redirected to PayPal Site.** The customer is redirected to the PayPal site to complete the transaction. / The customer taps the “Check out with PayPal” button. and is redirected to the PayPal site to complete the transaction.
- 3 Customer Logs into their PayPal Account.** The customer must log in to their PayPal account to complete the transaction. The payment system uses the customer’s billing and shipping information from their PayPal account.
- 4 Customer Returns to the Checkout Page.** The customer is redirected back to the checkout page in your store to review the order.
- 5 Customer Places Order.** The customer places the order, and the order information is submitted to PayPal.
- 6 PayPal Settles the Transaction.** PayPal receives the order and settles the transaction.

PayPal Express Checkout does not support orders with multiple-addresses.

## Setting Up PayPal Express Checkout

You can have two PayPal solutions active at the same time: Express Checkout, plus an All-In-One solution. If you enable a different solution, the one used previously is automatically deactivated.

### Process Overview:

Step 1: [Configure Your PayPal Account](#)

Step 2: [Complete the Required Settings](#)

Step 3: [Advertise PayPal Credit](#)

Step 4: [Complete the Basic Settings](#)


Step 5: [Complete the Advanced Settings](#)

### Step 1: Configure Your PayPal Account

1. Before you begin, you must configure your PayPal merchant account on the PayPal website.

- a. Log in to your PayPal Advanced account at [manager.paypal.com](https://manager.paypal.com).
- b. Go to **Service Settings > Hosted Checkout Pages > Set Up**, and make the following settings:

AVS	No
CSC	No
Enable Secure Token	Yes

- c. **Save** the settings.
2. PayPal recommends that you set up an additional user on your account. To set up an additional user, do the following:
- a. Go to [manager.paypal.com](https://manager.paypal.com) and log in to your account.
  - b. Follow the instructions to set up an additional user.
  - c. **Save** the changes.
3. Expand  the **Required PayPal Settings** section, and do the following:

- a. Enter the **Email Address** that is associated with your PayPal merchant account.

**Important!** Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

- b. Set **API Authentication Methods** to one of the following:

- API Signature
  - API Certificate
- c.** If necessary, click the **Get Credentials from PayPal** button. Then, complete the following:
- API Username
  - API Password
  - API Signature
- d.** If you are using credentials from your sandbox account, set **Sandbox Mode** to “Yes.”

If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.

When testing the configuration in a sandbox, use only **credit card numbers** that are recommended by PayPal. When you are ready to “go live,” return to the configuration and set Sandbox Mode to “No.”

- e.** If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to “Yes.” Then, complete the following:
- Proxy Host
  - Proxy Port
- 4.** When these sections are complete, set **Enable this Solution** to “Yes.”
- 5.** To enable **PayPal In-Context Checkout**, do the following:
- a.** Set **Enable In-Context Checkout Experience** to “Yes.”
  - b.** Enter your PayPal **Merchant Account ID**.
- Your Merchant Account ID is in your PayPal **business account** profile.
- 6.** To offer financing through PayPal to your customers, see PayPal Credit to learn more.

You have now completed the Required PayPal Settings. At this point, you can either continue with the Basic and Advanced Settings, or click the **Save Config** button. You can return later fine-tune the configuration.

## Step 2: Complete the Required Settings

- 1.** On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2.** In the panel on the left under **Sales**, choose **Payment Methods**.
- 3.** If your Magento installation has multiple websites, stores or views, in the upper-left corner, choose the **Store View** where the configuration applies.
- 4.** In the **Merchant Location** section, select the **Merchant Country** where your business is located.

5. Under Recommended Solutions in the **PayPal Express Checkout** section, tap **Configure**. Then, do the following:

- a. Enter the **Email Address** that is associated with your PayPal merchant account.

**Important!** Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

- b. Set **API Authentication Methods** to one of the following:

- API Signature
- API Certificate

- c. If necessary, tap **Get Credentials from PayPal**. Then, complete the following:

- API Username
- API Password
- API Signature

- d. If you are using credentials from your sandbox account, set **Sandbox Mode** to “Yes.”

If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.

- e. If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to “Yes.” Then, complete the following:

- Proxy Host
- Proxy Port

6. Set **Enable This Solution** to “Yes.”

7. If you want to offer PayPal Credit to your customers, set **Enable PayPal Credit** to “Yes.”

You have now completed the required settings. You can either continue with the remaining settings, or save and return later fine-tune the configuration.

### Step 3: Advertise PayPal Credit (Optional)

1. Expand  the **Advertise PayPal Credit** section. Then, do the following:

- a. Tap **Get Publisher ID from PayPal**, and follow the instructions to get your account information.
- b. Enter your **Publisher ID**.

Advertise PayPal Credit

[Why Advertise Financing?](#)

**Give your sales a boost when you advertise financing.**  
 PayPal helps turn browsers into buyers with financing from PayPal Credit®. Your customers have more time to pay, while you get paid up front – at no additional cost to you. Use PayPal's free banner ads that let you advertise PayPal Credit® financing as a payment option when your customers check out with PayPal. The PayPal Advertising Program has been shown to generate additional purchases as well as increase consumer's average purchase sizes by 15% or more. [See Details.](#)

Publisher ID  [WEBSITE]  
 Required to display a banner

*Advertise PayPal Credit*

2. Expand ☺ the **Home Page** section. Then, do the following:
  - a. To place a banner on the page, set **Display** to “Yes.”
  - b. Set **Position** to one of the following:
    - Header (center)
    - Sidebar (right)
  - c. Set **Size** to one of the following:
    - 190 x 100
    - 234 x 60
    - 300 x 50
    - 468 x 60
    - 728 x 90
    - 800 x 66

Home Page

Display  [WEBSITE]


Position  [WEBSITE]

Size  [WEBSITE]

*Advertise PayPal Credit Home Page Settings*

3. Repeat the previous step for the remaining sections:
  - Catalog Category Page
  - Catalog Product Page
  - Checkout Cart Page

### Step 4: Complete the Basic Settings

1. Expand  the **Basic Settings - PayPal Express Checkout** section.
2. Enter a **Title** to identify this payment method during checkout. It is recommended to set the title to “PayPal” for each store view.
3. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which PayPal Payments Standard is listed with the other methods. Payment methods appear in ascending order based on the Sort Order value.
4. Set **Payment Action** to one of the following:

**Authorization** Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.

**Sale** The amount of the purchase is authorized and immediately withdrawn from the customer’s account.

**Order** The amount of the order is neither captured nor authorized in the customer’s balance, bank account, or credit card at PayPal. The Order payment action represents an agreement between the PayPal payment system and the merchant, which enables the merchant to capture one or more amounts up to the “ordered” total from the customer’s buyer account, over a period of up to 29 days. After the funds are “ordered,” the merchant can capture them at any time during the following 29 day period. Capturing of the order amount can be done only from the Magento Admin by creating one or more invoices.

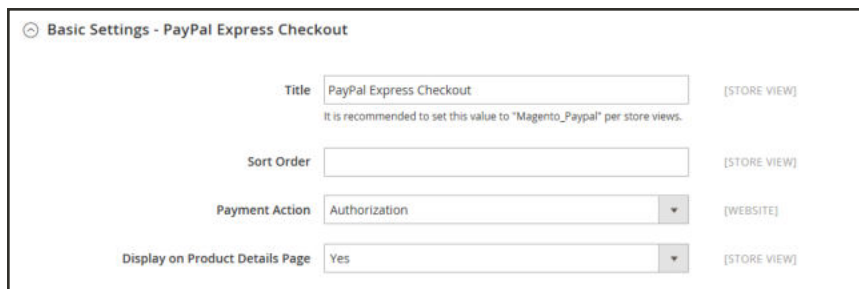
5. To display the “Check out with PayPal” button on the product page, set **Display on Product Details Page** to “Yes.”
6. If **Payment Action** is set to “Order,” complete the following fields:

**Authorization Honor Period (days)** Determines how long the primary authorization remains 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)** Determines 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 must contact PayPal.



**Number of Child Authorizations** Specifies the maximum number of authorizations for a single order, which determines the maximum number of online partial invoices that you can create for an 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 must contact PayPal.



*Basic Settings*

### Step 5: Complete the Advanced Settings

1. Expand ☺ the **Advanced Settings** section. Then, complete the following:

- a. Set **Display on Shopping Cart** to “Yes.”
- b. Set **Payment Applicable From** to one of the following:

**All Allowed Countries** Accepts payment from the countries already specified in your configuration.

**Specific Countries** Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.

- c. Set **Debug Mode** to “Yes” to write communications with the payment system into the log file. The log file for PayPal Payments Advanced is payments\_payflow\_advanced.log.

In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

- d. To enable host authenticity verification, set **Enable SSL Verification** to “Yes.”
- e. To display a full summary of the customer’s order by line item from the PayPal site, set **Transfer Cart Line Items** to “Yes.”

To include up to ten shipping options in the summary, set **Transfer Shipping Options** to “Yes.” (This option appears only if line items are set to transfer.)

- f. To determine the type of image used for the PayPal acceptance button, set **Shortcut Buttons Flavor** to one of the following:

Dynamic	(Recommended) Displays an image that can be dynamically changed from the PayPal server.
Static	Displays a specific image that cannot be dynamically changed.

**g.** To allow customers without PayPal accounts to make a purchases with this method, set **Enable PayPal Guest Checkout** to “Yes.”

**h.** Set **Require Customer’s Billing Address** to one of the following:

Yes	Requires the customer’s billing address for all purchases.
No	Does not require the customer’s billing address for any purchases.
For Virtual Quotes Only	Requires the customer’s billing address for virtual quotes only.

**i.** To specify whether the customer can sign a **billing agreement** with your store in the PayPal payment system when there are no active billing agreements available in the customer account, set **Billing Agreement Signup** to one of the following:

Auto	The customer can either sign a billing agreement during the Express Checkout flow or use another method of payment.
Ask Customer	The customer can decide whether to sign a billing agreement during the Express Checkout flow.
Never	The customer cannot sign a billing agreement during the Express Checkout flow.

Merchants must ask PayPal Merchant Technical Support to enable billing agreements in their accounts. The Billing Agreement Signup parameter is enabled only after PayPal confirms that billing agreements are enabled for your merchant account.

**j.** To allow the customer to complete the transaction from the PayPal site without returning to your Magento store for Order Review, set **Skip Order Review Step** to “Yes.”

**Advanced Settings**

Display on Shopping Cart	Yes (PayPal recommends this option)	[STORE VIEW]
Also affects mini-shopping cart.		
Payment Applicable From	All Allowed Countries	[WEBSITE]
Debug Mode	No	[WEBSITE]
Enable SSL verification	Yes	[WEBSITE]
Transfer Cart Line Items	Yes	[WEBSITE]
Transfer Shipping Options	No	[WEBSITE]
Notice that PayPal can handle up to 10 shipping options. That is why Magento will transfer only first 10 cheapest shipping options if there are more than 10 available.		
Shortcut Buttons Flavor	Dynamic	[STORE VIEW]
Enable PayPal Guest Checkout	No	[WEBSITE]
Ability for buyer to purchase without PayPal account.		
Require Customer's Billing Address	No	[WEBSITE]
This feature needs to be enabled first for the merchant account through PayPal technical support.		
Billing Agreement Signup	Never	[WEBSITE]
Whether to create a billing agreement, if there are no active billing agreements available.		
Skip Order Review Step	Yes	[WEBSITE]

*Advanced Settings*

2. Complete the following sections as needed for your store:

### PayPal Billing Agreement Settings

A **billing agreement** is a sales agreement between the merchant and customer that has been authorized by PayPal for use with multiple orders. During the checkout process, the Billing Agreement payment option appears only for customers who have already entered into a billing agreement with your company. After PayPal authorizes the agreement, the payment system issues a unique reference ID to identify each order that is associated with the agreement. Similar to a purchase order, there is no limit to the number of billing agreements a customer can set up with your company.

1. Expand ☺ the **PayPal Billing Agreement Settings** section.
2. Set **Enabled** to “Yes.” Then, do the following:
  - a. Enter a **Title** to identify the PayPal Billing Agreement method during checkout.
  - b. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which Billing Agreement appears when listed with other payment methods during checkout.
  - c. Set **Payment Action** to one of the following:

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.

d. Set **Payment Applicable From** to one of the following:

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.

e. To record communications with the payment system in the log file, set **Debug Mode** to “Yes.”

The log file is stored on the server and is accessible only to developers. In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

- f. To enable SSL verification, set **Enable SSL verification** to “Yes.”
- g. To display a summary of each line item in the customer’s order on your PayPal payments page, set **Transfer Cart Line Items** to “Yes.”
- h. To allow customers to initiate a billing agreement from the dashboard of their customer account, set **Allow in Billing Agreement Wizard** to “Yes.”

**PayPal Billing Agreement Settings**

Enabled	<input type="text" value="Yes"/>	[WEBSITE]
	<small>Will appear as a payment option only for customers who have at least one active billing agreement.</small>	
Title	<input type="text" value="PayPal Billing Agreement"/>	[STORE VIEW]
Sort Order	<input type="text"/>	[STORE VIEW]
Payment Action	<input type="text" value="Authorization"/>	[WEBSITE]
Payment Applicable From	<input type="text" value="All Allowed Countries"/>	[WEBSITE]
Debug Mode	<input type="text" value="No"/>	[WEBSITE]
Enable SSL verification	<input type="text" value="Yes"/>	[WEBSITE]
Transfer Cart Line Items	<input type="text" value="No"/>	[WEBSITE]
Allow in Billing Agreement Wizard	<input type="text" value="Yes"/>	[WEBSITE]

*Billing Agreement Settings*

## Settlement Report Settings

1. Click to expand the **Settlement Report Settings** section.
2. If you have signed up for PayPal's Secure FTP Server, enter the following SFTP login credentials:
  - Login
  - Password
3. To run test reports before "going live" with Express Checkout on your site, set **Sandbox Mode** to "Yes."
4. Enter the **Custom Endpoint Hostname or IP Address**. By default, the value is: reports.paypal.com
5. Enter the **Custom Path** where reports are saved. By default, the value is: /ppreports/outgoing
6. To generate reports according to a schedule, under Scheduled Fetching, make the following settings:
  - a. Set **Enable Automatic Fetching** to "Yes."
  - b. Set **Schedule** to one of the following options. PayPal retains each report for forty-five days.
    - Daily
    - Every 3 Days
    - Every 7 Days
    - Every 10 Days
    - Every 14 Days
    - Every 30 Days
    - Every 40 Days
  - c. Set **Time of Day** to the hour, minute, and second when you want the reports to be generated.

**Settlement Report Settings**

**SFTP Credentials**

Login  [WEBSITE]

Password  [WEBSITE]

Sandbox Mode  [WEBSITE]

Custom Endpoint Hostname or IP-Address  [WEBSITE]  
By default it is "reports.paypal.com".

Custom Path  [WEBSITE]  
By default it is "/ppreports/outgoing".

**Scheduled Fetching**

Enable Automatic Fetching  [WEBSITE]

Schedule  [GLOBAL]  
PayPal retains reports for 45 days.

Time of Day  :  :  [GLOBAL]

*Settlement Report Settings*

### Frontend Experience Settings

The frontend experience settings give you the opportunity to choose which PayPal logos appear on your site, and to customize the appearance of your PayPal merchant pages.

1. Click to expand the **Frontend Experience Settings** section.

**Frontend Experience Settings**

PayPal Product Logo  [store view]  
Displays on catalog pages and homepage.

**PayPal Merchant Pages Style**

Page Style  [store view] ?

Header Image URL  [store view] ?

Header Background Color  [store view] ?

Header Border Color  [store view] ?

Page Background Color  [store view] ?

*Checkout Page Settings*

2. Select the **PayPal Product Logo** that you want to appear in the PayPal block in your store. The PayPal logos are available in four styles and two sizes. Options include:
  - No Logo
  - We Prefer PayPal (150 x 60 or 150 x 40)
  - Now Accepting PayPal (150 x 60 or 150 x 40)
  - Payments by PayPal (150 x 60 or 150 x 40)
  - Shop Now Using PayPal (150 x 60 or 150 x 40)
3. To customize the appearance of your PayPal merchant pages, do the following:

- a. Enter the name of the **Page Style** that you want to apply to your PayPal merchant pages. Options include:

paypal	Uses the PayPal page style.
primary	Uses the page style that you identified as the “primary” style in your account profile.
your_custom_value	Uses a custom payment page style, which is specified in your account profile.

- b. In the **Header Image URL** field, enter the URL of the image that you want to appear in the upper-left corner of the payment page. The maximum file size is 750 pixels wide by 90 pixels high.

PayPal recommends that the image be located on a secure (https) server. Otherwise, the customer's browser may warn that “the page contains both secure and nonsecure items.”

- c. Enter the six-character hexadecimal code, without the “#” symbol, for each of the following:

Header Background Color	Background color for the checkout page header.
Header Border Color	2-pixel border around the header.
Page Background Color	Background color for the checkout page and around the header and payment form.

4. PayPal's Express Checkout Smart Payment Buttons feature allows you to customize the PayPal button, which can be displayed on the Checkout, Product Detail, Cart, and Mini Cart pages, PayPal's internal research suggests that the default options are highly recognizable and might lead to increase purchase rates, but their defaults might not match your store's styling. You can choose:

- The size, color, and shape of the PayPal button
  - The text that appears on the PayPal button
  - The layout, when multiple buttons are displayed (horizontal or vertical)
- a. Click to expand the **Checkout Page** section.
  - b. Set **Customize Button** to **Yes**.

**Customize Smart Buttons**

☷ Checkout Page

**Customize Button** [store view] Yes

**Label** [store view] Credit  
The installment feature is available only in these locales: en\_MX, es\_MX, en\_BR, pt\_BR.

**Size** [store view] Responsive

**Shape** [store view] Rectangle

☷ Product Pages

☷ Cart Page

☷ Mini Cart

*Checkout Page Settings*

- c. To set the text that PayPal displays on the Smart Payment Button, set **Label** to one of the following:

Checkout	Displays as <b>PayPal Checkout</b>
Pay	Displays as <b>PayPal Checkout</b>
Buy Now	Displays as <b>Buy Now with PayPal</b>
PayPal	Displays as <b>PayPal</b>
Installment	Displays as <b>PayPal</b>
Credit	Displays as <b>PayPal CREDIT</b>



d. Set the **Layout** of the Smart Payment Button. Options include:

Vertical	Default layout. Displays PayPal Smart Buttons vertically. The buyer must either log in to PayPal or create a PayPal account regardless of whether <b>Enable Guest Checkout</b> is selected.
Horizontal	Displays PayPal Smart Buttons horizontally. When <b>Enable Guest Checkout</b> is selected, the <b>Pay with Debit Card or Credit Card</b> button displays on the PayPal pop-up window. Otherwise, the buyer must either log in to PayPal or create a PayPal account.

e. Set the **Size** of the Smart Payment Button. Options include:

Medium	250 pixels by 35 pixels.
Large	350 pixels by 40 pixels
Responsive	Default sizing. Adjusts to the width of the container. The minimum width is 100 pixels, and the maximum width is 500 pixels. The height dynamically adjusts based on the width.

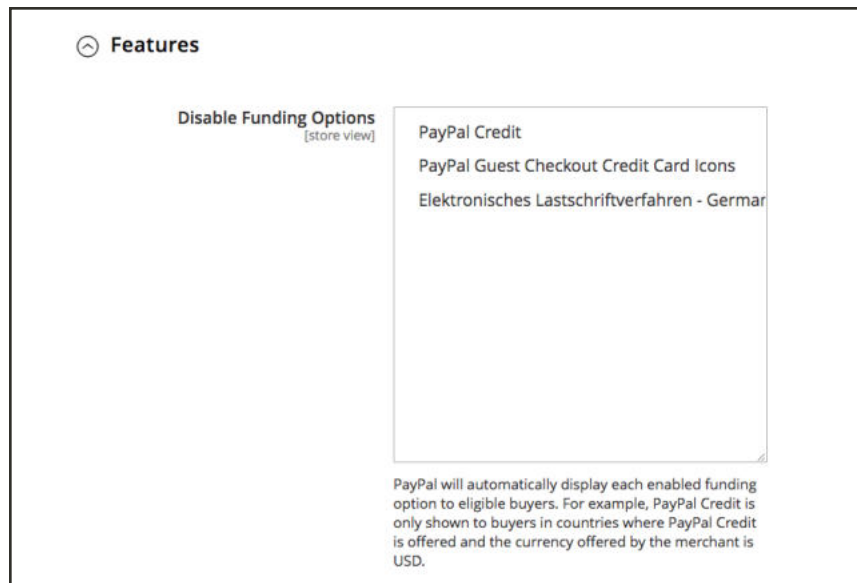
f. Set the **Shape** of the Smart Payment Button. Options include:

Pill	Default shape. The button is shaped like a pill, or long in the center and curved on the ends.
Rectangle	Squared shape without curves, in a rectangle.

g. Set the **Color** of the Smart Payment Button. Options include:

- Gold (Default)
- Blue
- Silver
- Black

5. Click to expand the **Features** section.



*Checkout Page Settings*

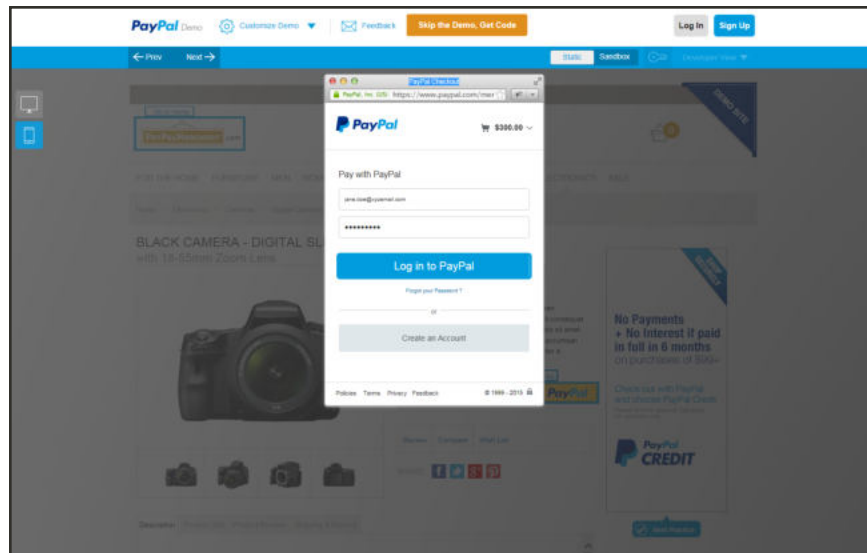
**Disable Funding Options** determines which other PayPal funding options are displayed on the Checkout page. Selected options will never be displayed on the Checkout page. Unselected options will be displayed only if PayPal supports the store's currency and the buyer's location. Options:

- PayPal Credit
- PayPal Guest Checkout Credit Card Icons
- Elektronisches Lastschriftverfahren - German ELV

3. When complete, tap **Save Config.**

## PayPal In-Context Checkout

PayPal's In-Context Checkout makes it easier than ever to pay online. Customers never lose sight of your store during this simplified one- or two-click seamless checkout. In-Context Checkout works equally well on Macs and PCs, and offers a consistent experience on desktop computers, tablets, and mobile devices. To learn more, see: [In-Context Checkout in Express Checkout](#).



*PayPal In-Context Checkout Demo*

### To configure In-Context Checkout:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. In the **PayPal Express Checkout** section, tap **Configure**. Then, do the following:
  - a. In the **Required PayPal Settings** section, set **Enable In-Context Checkout Experience** to “Yes.”
  - b. Enter your PayPal **Merchant Account ID**.

Your Merchant Account ID is in your PayPal **business account** profile.

Enable this Solution [website] No

✓ Enable In-Context Checkout Experience [website] Yes  
See PayPal Feature Support details and list of supported regions [here](#).

Merchant Account ID [website]

Enable PayPal Credit [website] No

PayPal Express Checkout lets you give customers access to financing through PayPal Credit® - at no additional cost to you. You get paid up front, even though customers have more time to pay. A pre-integrated payment button lets customers pay quickly with PayPal Credit®. [Learn More](#)

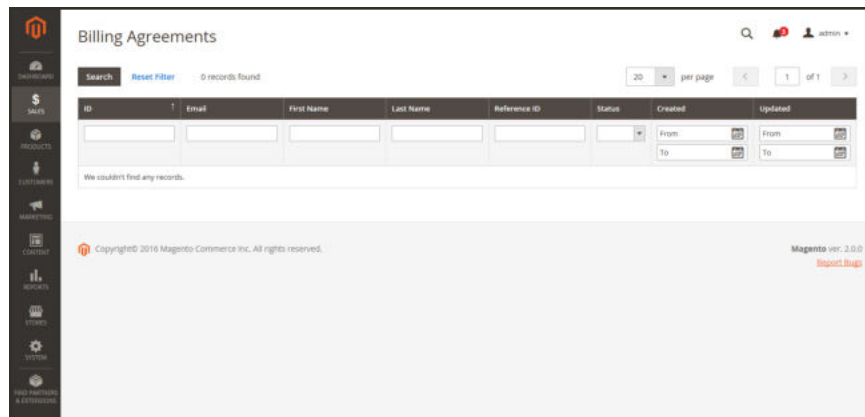
*Enable PayPal In-Context Checkout*

4. When complete, tap **Save Config**.

## PayPal Billing Agreements

To simplify the checkout process, customers can enter into a billing agreement with PayPal, as the payment service provider. During checkout, the customer chooses the billing agreement as the payment method. The payment system verifies the billing agreement by its unique number, and charges the customer's account. With a billing agreement in place, it is no longer necessary for the customer to enter payment information for each purchase. Customers can manage their billing agreements from the dashboard of their customer account, where the status of each is shown as “Active” or “Canceled.” When a billing agreement is canceled, it cannot be reactivated.

The Billing Agreements grid lists all billing agreements between your store and its customers. The store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer’s billing agreements. A canceled billing agreement can be deleted only by the store administrator.



*Billing Agreements*

## Billing Agreement Workflow

**1**

**Customer signs up for a billing agreement.** After a billing agreement is in place, additional billing agreements can be added only from the customer account. There is no limit to the number of billing agreements a customer can create. Customers can use any of the following methods to sign up for billing agreements:

- **Sign up in customer account.** Customers can sign up for a billing agreement from their customer accounts.
- **Sign up at checkout.** Customers who pay for a purchase with PayPal Express Checkout can mark a checkbox to create a billing agreement. Although the billing agreement is not used for the current order, it becomes available as a payment method option the next time the customer places an order.
- **Sign up by store administrator.** On a customer's request, the store administrator can create a sales order using the customer's billing agreement.

**2**

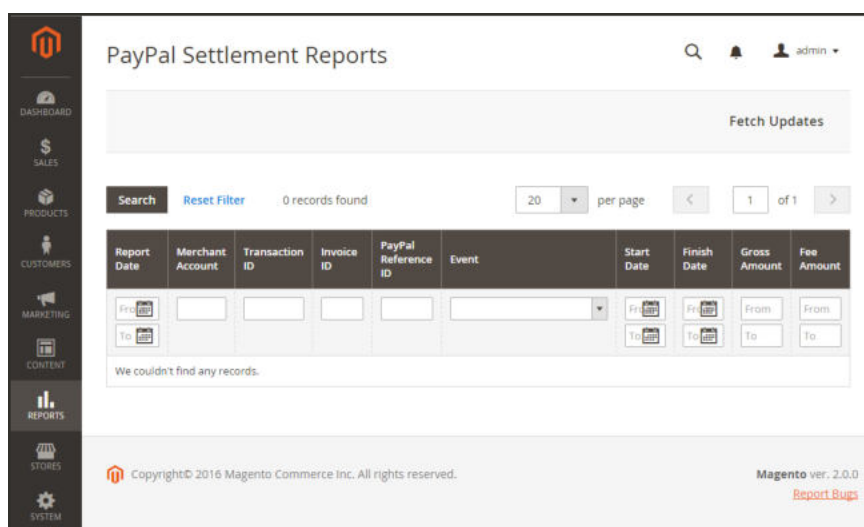
**PayPal Verifies and Records Agreement.** When the customer places the order with payment by billing agreement, the billing agreement reference ID and sales order payment details are transferred to PayPal, and recorded in the customer account, along with reference information. If the payment is authorized, an order is created in Magento. The billing agreement reference ID is sent to the customer and to the store.

## PayPal Settlement Reports

The PayPal Settlement report provides the store administrator with the information about each transaction that affects the settlement of funds.

Before generating settlement reports, the store administrator must request PayPal Merchant Technical Services to create an SFTP user account, enable settlement reports generation, and enable SFTP in their PayPal business account.

After configuring and enabling settlement reports in the PayPal merchant account, Magento will start generating reports during the following twenty-four hours. The list of available settlement reports can be viewed from the Admin.



### To view settlement reports:

1. On the Admin sidebar, tap **Reports**. Then under **Sales**, choose select **PayPal Settlement**.
2. For the most recent updates, tap **Fetch Updates** in the upper-right corner.

The system connects to the PayPal SFTP server to fetch the reports. When the process is complete, a message appears with the number of reports fetched. The report includes the following information for each transaction:

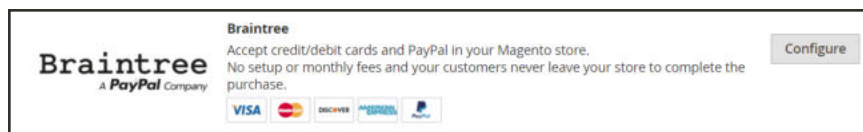
## Field Descriptions

FIELD	DESCRIPTION
PayPal Reference ID Type	One of the following reference codes: Order ID Transaction ID Subscription ID
Preapproved Payment ID	Options include:  Custom                      The text entered by the merchant on the transaction in PayPal.  Transaction Debit or Credit      The direction of money movement of gross amount.  Fee Debit or Credit              The direction of money movement for fee.



## Braintree

Braintree offers a fully customizable checkout experience with fraud detection and PayPal integration. Braintree reduces the PCI compliance burden for merchants because the transaction takes place on the Braintree system.



*Configure Braintree*

## Setting Up Braintree

### Process Overview:

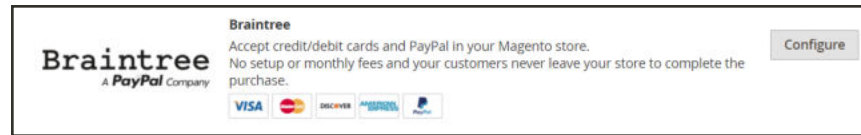
- Step 1: [Get Your Braintree Credentials](#)
- Step 2: [Complete the Basic Settings](#)
- Step 3: [Complete the Advanced Settings](#)
- Step 4: [Complete the Country-Specific Settings](#)
- Step 5: [Complete the PayPal through Braintree Settings](#)
- Step 6: [Complete the 3D Verification Settings](#)

### Step 1: Get Your Braintree Credentials

Visit [Braintree Payments](#) and sign up for an account.

### Step 2: Complete the Basic Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
  - If your Magento installation has multiple websites, stores or views, in the upper-left corner, choose the **Store View** where the configuration applies.
  - In the **Merchant Location** section, verify that **Merchant Country** is set to the location of your business.
3. Under Recommended Solutions, in the **Braintree** section, tap **Configure**. Then, do the following:



### Configure Braintree

- a. Enter a **Title** to identify Braintree as a payment option during checkout.
- b. Set the current operating **Environment** for Braintree transactions to one of the following:
  - Sandbox
  - Production

When testing the configuration in a sandbox, use only **credit card numbers** that are recommended by Braintree. When you are ready to go live with Braintree, set **Environment** to “Production.”

- c. Set **Payment Action** to one of the following:

**Authorize Only** Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer’s bank account until the sale is “captured” by the merchant.

**Authorize and Capture** The amount of the purchase is authorized and immediately withdrawn from the customer’s account.

- d. Enter the **Merchant ID** from your Braintree account.
- e. Enter the following credentials from your Braintree account:
  - Public Key
  - Private Key

 A screenshot of the "Basic Braintree Settings" configuration page. At the top, there is a link to login or sign up. Below that, a paragraph explains the use of Hosted Fields technology. The form contains several input fields:
 

- Title** [store view]: A text input field containing "Credit Card (Braintree)".
- Environment** [website]: A dropdown menu with "Sandbox" selected.
- Payment Action** [website]: A dropdown menu with "Authorize" selected.
- Merchant ID** [website]: An empty text input field.
- Public Key** [website]: An empty text input field.
- Private Key** [website]: An empty text input field.

### Basic Settings

4. Set **Enable this Solution** to “Yes.”
5. To include PayPal as a payment option with Braintree, set **Enable PayPal through Braintree** to “Yes.”
6. If you want the ability to store customer information securely, so customers don't have to reenter it each time they make a purchase, set **Vault Enabled** to “Yes.”

The image shows a screenshot of the Braintree Basic Settings interface. It contains three rows, each with a label and a dropdown menu. The first row is labeled 'Enable this Solution' with a small '[website]' below it, and the dropdown is set to 'No'. The second row is labeled 'Enable PayPal through Braintree' with a small '[website]' below it, and the dropdown is set to 'No'. The third row is labeled 'Vault Enabled' with a small '[website]' below it, and the dropdown is set to 'No'.

*Basic Settings*

### Step 3: Complete the Advanced Settings

1. Expand ☺ the **Advanced Braintree Settings** section.
2. In the **Vault Title** field, enter a descriptive title for your reference that identifies the vault where your customer card information is stored.
3. Enter the **Merchant ID** from your Braintree account.
4. To use Braintree fraud protection for all transactions, set **Advanced Fraud Protection** to “Yes.”  
Make sure that Advanced Fraud Protection is enabled in the Settings/Protection section of your account.
5. If you want the system to save a log file of interactions between your store and Braintree, set **Debug** to “Yes.”
6. To require customers to provide the three-digit security code from the back of a credit card, set **CVV Verification** to “Yes.”

If using CVV verification, make sure to enable AVS and/or CVV in the Settings/Processing section of your Braintree account.

7. In the **Credit Card Types** box, hold down the Ctrl key and select each credit card that is accepted by your store as payment through Braintree.
8. In the **Sort Order** field, enter a number to determine the sequence in which Braintree appears when listed with other payment methods during checkout.

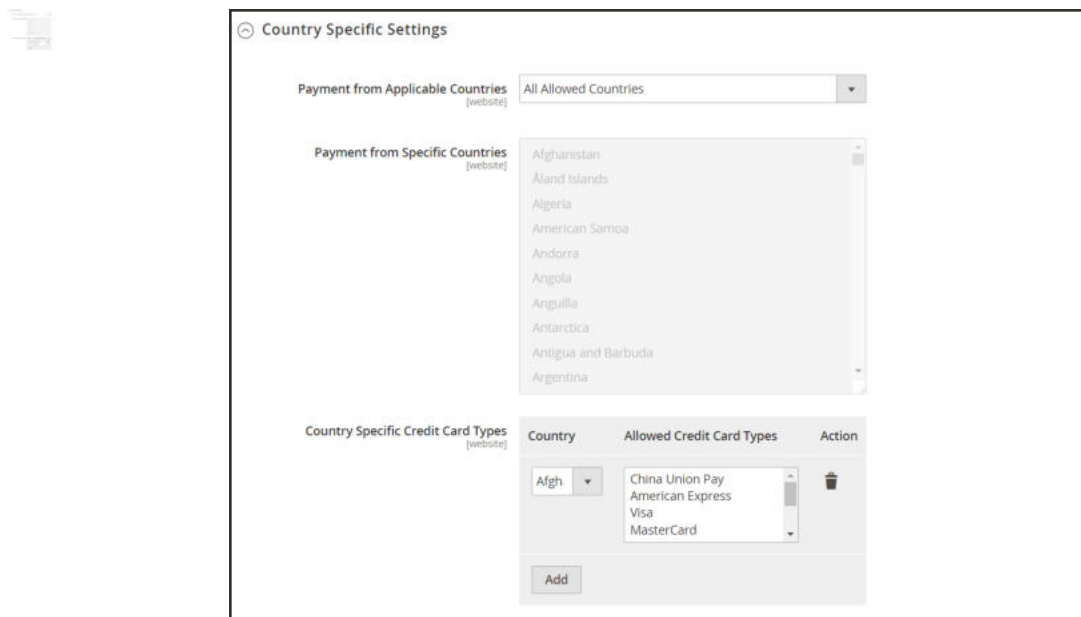
The screenshot shows the 'Advanced Braintree Settings' interface. It includes several configuration fields: 'Vault Title' (text input with value 'Stored Cards (Braintree)'), 'Merchant Account ID' (text input), 'Advanced Fraud Protection' (dropdown menu set to 'No'), 'Debug' (dropdown menu set to 'No'), 'CW Verification' (dropdown menu set to 'Yes'), 'Credit Card Types' (checkbox list with options: China Union Pay, American Express, Visa, MasterCard, Discover, JCB, Diners, and Maestro International), and 'Sort Order' (text input).

*Advanced Settings*

#### Step 4: Complete the Country Specific Settings

1. Set **Payment from Applicable Countries** to one of the following:
  - All Allowed Countries
  - Specific Countries

For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.



*Country-Specific Settings*

2. To set up **Country Specific Credit Card Types**, do the following:
  - a. Tap **Add**.
  - b. Set the **Country**, and choose each **Allowed Credit Card Type**.
  - c. Repeat to identify the credit cards that are accepted from each country.

**Step 5: Complete the PayPal through Braintree Settings**

1. Do the following to identify your PayPal through Braintree configuration:
  - a. Enter a **Title** to identify Braintree’s payment by PayPal option during checkout.
  - b. In the **Vault Title** field, enter a descriptive title to identify the vault where your customer card information is to be stored.
  - c. In the **Sort Order** field, enter a number to determine the sequence in which Braintree’s PayPal payment option appears when listed with other payment options during checkout.
  - d. To display your **merchant name** differently than what is defined in your store configuration, enter the name as you want it to appear in the **Override Merchant Name** field.
2. Set **Payment Action** to one of the following:

Authorize	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer's account.

3. Set **Payment from Applicable Countries** to one of the following for Braintree transactions processed by PayPal:

- All Allowed Countries
- Specific Countries

For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.

4. To require that customers provide a billing address, set **Require Customer's Billing Address** to "Yes."

This feature must first be enabled for your account by PayPal Technical Support.

5. If you want customers to be able to edit the shipping address while completing a PayPal transaction, set **Allow to Edit Shipping Address Entered During Checkout on PayPal Side** to "Yes."
6. To save a log file of interactions between your store and PayPal through Braintree, set **Debug** to "Yes."
7. If you want to bypass the Order Review step before the order is submitted, set **Skip Order Review** to "Yes."

By default, Order Review is the last stage of the checkout process.

8. To display the PayPal button on both the mini shopping cart and shopping cart page, set **Display on Shopping Cart** to "Yes."

**PayPal through Braintree**

**Title** [store view]: PayPal (Braintree)  
It is recommended to set this value to "PayPal" per store views.

**Vault Enabled** [website]: No

**Sort Order** [website]:

**Override Merchant Name** [store view]:

**Payment Action** [website]: Authorize

**Payment from Applicable Countries** [website]: All Allowed Countries

**Payment from Specific Countries** [website]: Afghanistan, Åland Islands, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina

**Require Customer's Billing Address** [website]: No  
This feature needs to be enabled first for the merchant account through PayPal technical support.

**Allow to Edit Shipping Address Entered During Checkout on PayPal Side** [website]: Yes

**Debug** [website]: No

**Skip Order Review** [website]: No

**Display on Shopping Cart** [website]: Yes  
Also affects mini-shopping cart.

*PayPal through Braintree Settings*

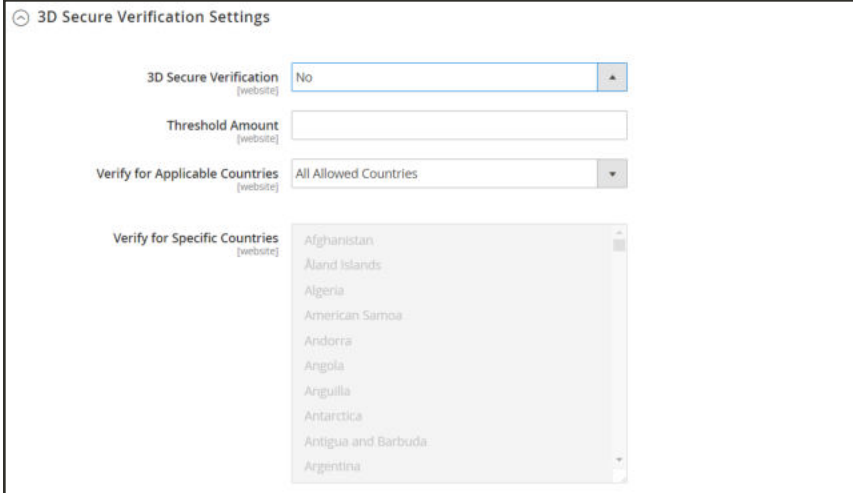
### Step 6: Complete the 3D Verification Settings

1. If you want to add a verification step for customers using credit cards that are enrolled in a verification program such as “Verified by VISA,” set **3d Secure Verification** to “Yes.”

During the process, the transaction amount that is submitted for verification is checked against the amount that is sent for authorization,

2. In the **Threshold Amount** field, enter the minimum order amount that is required to trigger 3D verification.
3. Set **Verify for Applicable Countries** to one of the following:
  - All Allowed Countries
  - Specific Countries

To **Verify for Specific Countries**, hold down the Ctrl key and select each country from which payments are to be verified.



3D Secure Verification Settings

3D Secure Verification [website] No

Threshold Amount [website]

Verify for Applicable Countries [website] All Allowed Countries

Verify for Specific Countries [website]

- Afghanistan
- Aland Islands
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina

*3D Verification Settings*

### Step 7: Dynamic Descriptors

The following descriptors are used to identify purchases on customer credit card statements. You can reduce the number of chargebacks by clearly identifying the company that is associated with each purchase. If Dynamic Descriptors are not enabled for your account, contact [Braintree support](#).

1. Enter the Dynamic Descriptor for the **Name**, **Phone**, and **URL** according to these guidelines:



**Name** There are two parts to the Name descriptor, which are separated by an asterisk (\*). For example:

company\*myproduct

The first part of the descriptor identifies the company or DBA, and the second part identifies the product. The length of the Company and Product parts of the descriptor can be allocated in the following ways, for a combined length of up to twenty-two characters.

**Characters in Name Descriptor**

	Company	Product
Option 1	Must be 3 characters	Up to 18 characters
Option 2	Must be 7 characters	Up to 14 characters
Option 3	Must be 12 characters	Up to 9 characters

**Phone** The Phone descriptor must be ten to fourteen characters in length, and can include only numbers, dashes, parentheses, and periods. For example:

9999999999

(999) 999-9999

999.999.9999

**URL** The URL descriptor represents your domain name, and can be up to thirteen characters long. For example: company.com

2. When your Braintree configuration is complete, tap **Save Config.**

## Other PayPal Solutions

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento Open Source, you can accept payments from all major debit and credit cards. PayPal offers additional convenience without extra effort, because even your customers who don't have a PayPal account can pay for their purchases with PayPal. In this guide, PayPal payments solutions are categorized as follows:

- [Recommended Solutions \(Paypal Express Checkout\)](#)
- PayPal All-In-One Payment Solutions
- PayPal Payment Gateways

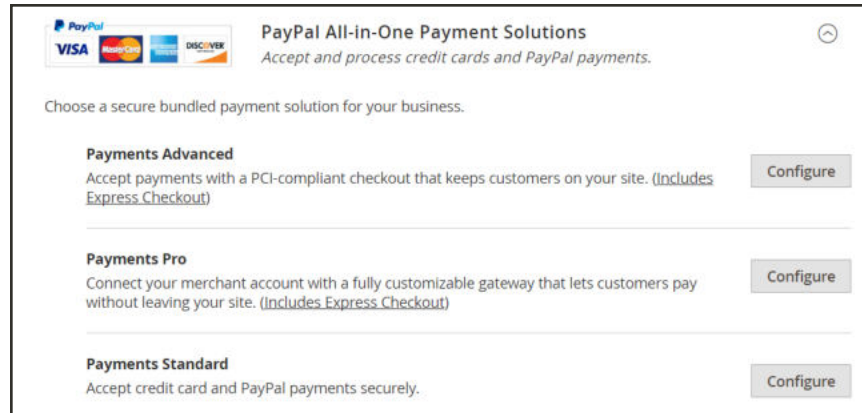
The selection of available PayPal solutions varies by merchant location. PayPal Express Checkout and PayPal Payments Standard can be used in all parts of the world. To learn more, see: [PayPal Solutions by Country](#).

You cannot have more than one PayPal method enabled at a time, with the exception of PayPal Express Checkout. PayPal Express Checkout can be used in combination with other PayPal payment methods, except for PayPal Payments Standard. If you change payment solutions, the one used previously is disabled.

## PayPal All-In-One Payment Solutions

In the United States, PayPal offers the following PCI-compliant solutions to meet the needs of your growing business.

- [PayPal Payments Advanced](#)
- [PayPal Payments Pro](#)
- [PayPal Payments Standard](#)

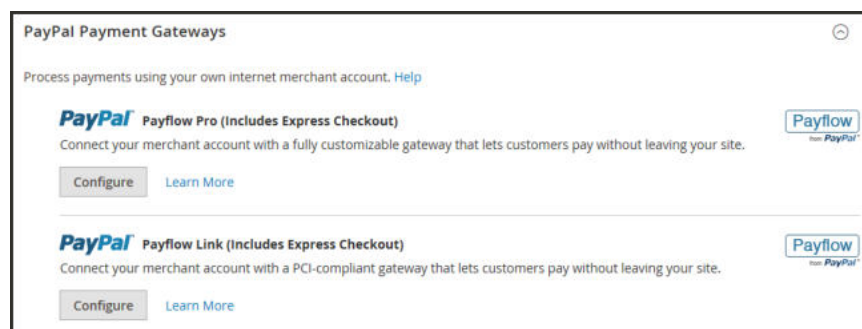


*PayPal All-In-Payment Solutions*

## PayPal Payment Gateways

PayPal offers a choice of two payment gateway solutions for your business. You can let PayPal host your checkout on its secure payment site, or you can take control of the entire payment experience with a completely customizable solution.

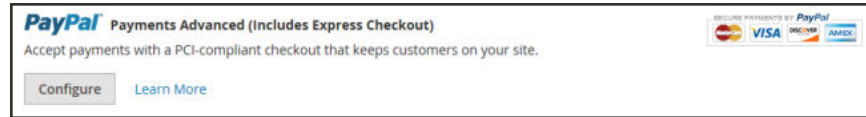
- [PayPal Payflow Pro](#)
- [PayPal Payflow Link](#)



*PayPal Payment Gateways*

## PayPal Payments Advanced

PayPal Payments Advanced is a **PCI-compliant** solution that lets your customers pay by debit or credit card without leaving your site. It includes an embedded checkout page that can be customized to create a seamless and secure checkout experience.



### *PayPal Payments Advanced*

Even customers without a PayPal account can make purchases through PayPal's secure payment gateway. Accepted cards include Visa, MasterCard, Switch/Maestro, and Solo credit cards in the United States and United Kingdom. For additional convenience, PayPal Express Checkout is included with PayPal Payments Advanced.

You can have two PayPal solutions active at the same time: Express Checkout, plus any All-In-One or Payment Gateway solution. If you change payment solutions, the one that was used previously is disabled.

PayPal Payments Advanced cannot be used for orders created from the Admin of your store.

## Requirements

- PayPal Business Account**
- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

## Checkout Workflow

- 1 Customer Chooses Payment Method.** During checkout, the customer chooses to pay with PayPal Payments Advanced. The Pay Now button appears instead of the Place Order button.
- 2 Pay Now.** The customer taps Pay Now, and a PayPal-hosted form appears. The customer enters the card information, and the card is verified. If successful, the order confirmation page appears.  
**Pay with PayPal.** The form also includes the Pay with PayPal button, which redirects the customer to the PayPal site, where payment can be made with PayPal Express Checkout.
- 3 Troubleshooting.** If the transaction fails for any reason, an error message appears on the checkout page and the customer is instructed to try again. Any issues are managed by PayPal.

## Order Processing Workflow

Processing orders with PayPal Payments Advanced is the same as for any regular PayPal order. Orders are invoiced and shipped, and credit memos generated for both online and offline refunds. However, multiple online refunds are not available for orders paid with PayPal Payments Advanced.

- 1 Customer Places Order.** In the final stage of checkout, the customer taps the Place Order button.
- 2 PayPal Responds.** PayPal evaluates the request. If found to be valid, PayPal processes the transaction.

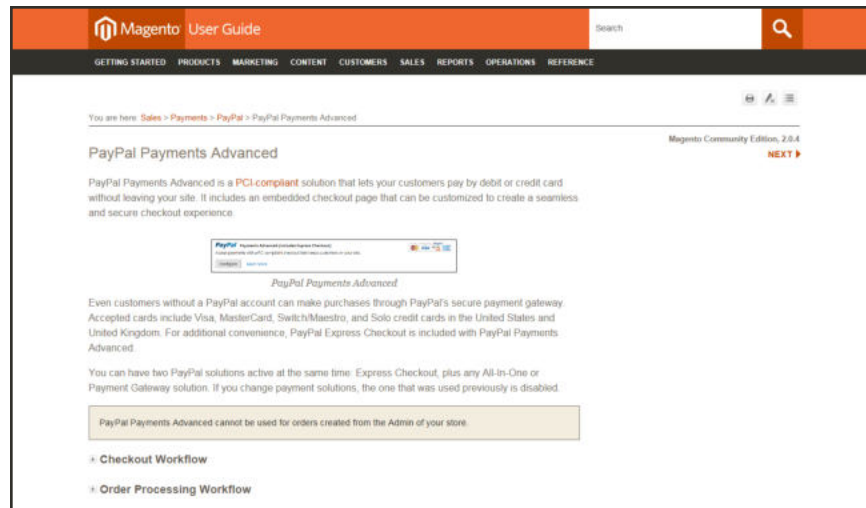
**3** **Magento Sets Order Status.** Magento receives response from PayPal, and sets the order status to one of the following:

- 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.

**4** **Merchant Fulfills Order.** The merchant invoices and ships the order.

## Setting Up PayPal Payments Advanced

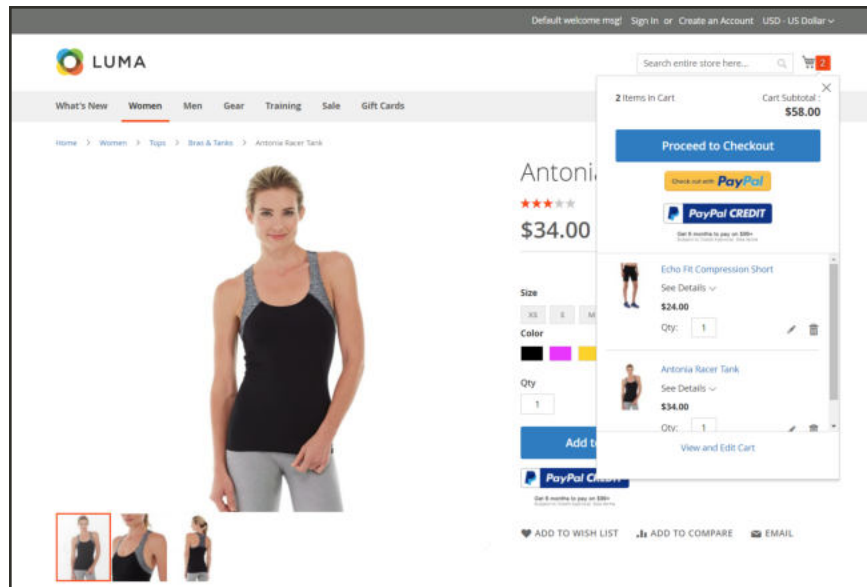
For step-by-step configuration instructions, see [PayPal Payments Advanced](#) in the Magento Open Sourceonline user guide.



*Setting Up PayPal Payments Advanced*

## PayPal Payments Pro

PayPal Payments Pro brings you all the benefits of a merchant account and payment gateway in one, plus the ability to create your own, fully customized checkout experience. PayPal Express Checkout is automatically enabled with PayPal Payments Pro, so you can tap into more than 110 million active PayPal users.



*PayPal Payments Pro*

For merchants outside the US, this method is called “PayPal Website Payments Pro.”

You can have two PayPal solutions active at the same time: PayPal Express Checkout, plus any one of the All-In-One solutions. If you change payment solutions, the one used previously is automatically disabled.

### Requirements

- PayPal Merchant Account** (with Direct Payments Activated)

## Checkout Workflow

1

**Customer Goes to Checkout.** Customer adds products to cart, and taps Proceed to Checkout.

2

**Customer Chooses Payment Method.** During checkout, customer chooses the PayPal Direct Payment option, and enters the credit card information.

- If paying with PayPal Payments Pro, the customer stays on your site during the checkout process.
- If paying with PayPal Express Checkout, the customer is redirected to the PayPal site to complete the transaction.

At the customer's request, the store administrator can also create an order from the Admin, and process the transaction with PayPal Payments Pro.



## Order Processing Workflow

1

**Order Placed.** The order can be processed either the Admin of your store, or from your PayPal merchant account.

2

**Payment Action.** The payment action specified in the configuration is applied to the order. Options include:

Authorize	Magento creates a sales order with the “Processing” status. In this case, the amount of money to be authorized is pending approval.
Sale	Magento creates both a sales order and invoice.
Capture	PayPal transfers the order amount from the buyer’s balance, bank account or credit card to the merchant’s account.

3

**Invoicing.** An invoice is created in Magento after PayPal sends an instant payment notification message to Magento.

Make sure that instant payment notifications are enabled in your PayPal merchant account.

If required, an order can be partially invoiced for a specified quantity of products. For each partial invoice submitted, a separate Capture transaction with a unique ID becomes available, and a separate invoice is generated.

Authorization-only payment transactions are closed only after the full order amount is captured.

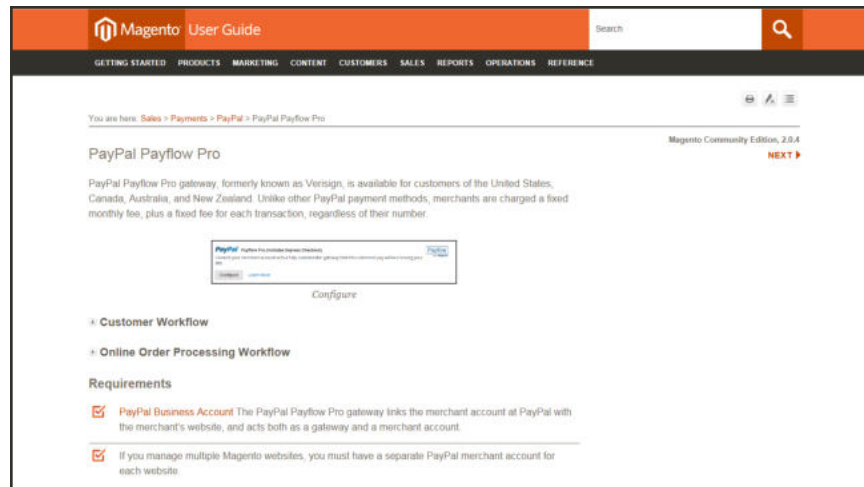
An order can be voided online at any time until the order amount is fully invoiced.

4

**Returns.** If for any reason the customer returns the purchased products and claims a refund, as with order amount capturing and invoice creation, you can create an online refund either from the Admin or from your PayPal merchant account.

## Setting Up PayPal Payments Pro

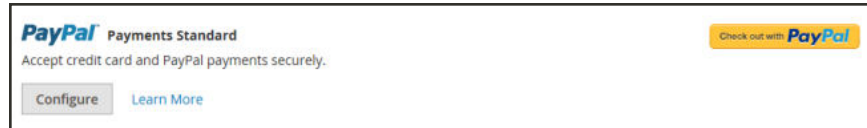
For step-by-step configuration instructions, see [PayPal Payments Pro](#) in the Magento Open Source online user guide.



*Setting Up PayPal Payment Pro*

## PayPal Payments Standard

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment both by credit card and PayPal by simply adding a checkout button to your store.



*PayPal Payments Standard*

For merchants outside the US, this method is called “PayPal Website Payments Standard.”

With PayPal Payments Standard, you can swipe credit cards on mobile devices. There is no monthly fee, and you can get paid on eBay. Supported credit cards include Visa, MasterCard, Discover, and American Express. In addition, customers can pay directly from their personal PayPal accounts. PayPal Payments Standard is available in all countries on the PayPal worldwide reference list.

### Merchant Requirements

- PayPal Business Account

### Checkout Workflow

For customers, PayPal Payments Standard is a one-step process if the credit card information the their personal PayPal accounts is up to date.

1

**Customer Places Order.** The customer taps the “Pay Now” button to complete the purchase.

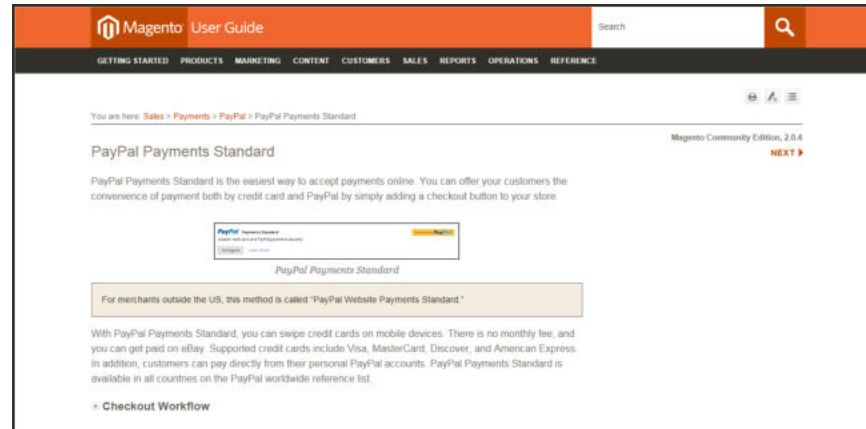
2

**PayPal Processes the Transaction.** The customer is redirected to the PayPal site to complete the transaction.

## Setting Up PayPal Payments Standard

PayPal Payments Standard cannot be used simultaneously with any other PayPal method, including Express Checkout. If you change payment solutions, the one used previously is disabled.

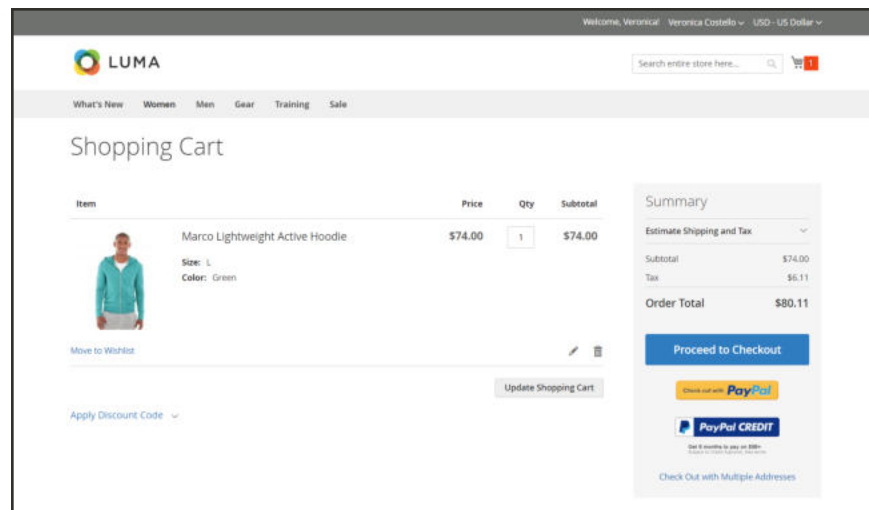
For step-by-step configuration instructions, see [PayPal Payments Standard](#) in the online user guide.



*Setting Up PayPal Payments Standard*

## PayPal Payflow Pro

PayPal Payflow Pro gateway, formerly known as Verisign, is available for customers of the United States, Canada, Australia, and New Zealand. Unlike other PayPal payment methods, merchants are charged a fixed monthly fee, plus a fixed fee for each transaction, regardless of their number.



*Checkout with PayPal*

### Requirements

- PayPal Business Account**  
The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.
- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

## Customer Workflow

1

**Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow Pro, and enters the credit card information.

Customers are not required to have personal PayPal accounts. However, depending on the merchant country, customers can also use their personal PayPal account to pay for the order.

2

**Customer Submits Order.** The customer submits the order, and the order information is sent to PayPal for processing. The customer does not leave the checkout page of your site.

3

**PayPal Completes the Transaction.** Payments are accepted at the time the order is placed. Depending on the payment action specified in the configuration, either a sales order or a sales order and an invoice is created.

## Online Order Processing Workflow

1

**Administrator Submits Online Invoice.** The store administrator submits an online invoice, and as a result a corresponding transaction and an invoice is created.

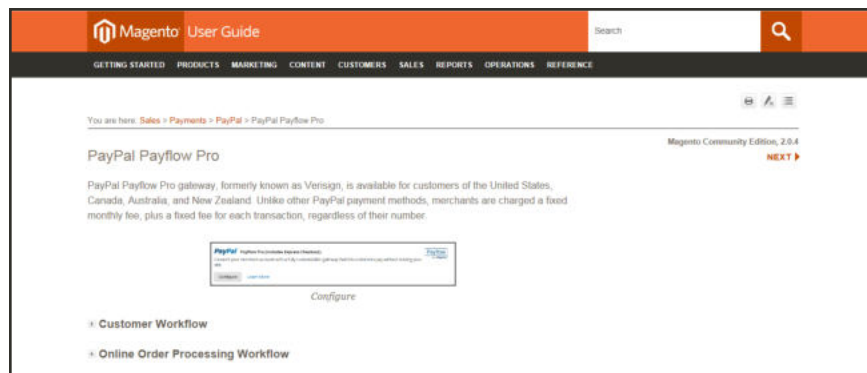
2

**PayPal Receives the Transaction.** The order information is sent to PayPal. A record of the transaction and an invoice is generated. You can view all Payflow Pro Gateway transactions in your [PayPal merchant account](#).

Partial invoices and partial refunds are not supported by PayPal Payflow Pro.

## Setting Up PayPal Payflow Pro

For step-by-step configuration instructions, see [PayPal Payflow Pro](#) in the Magento Open Sourceonline user guide.



*PayPal Payflow Pro*

## PayPal Payflow Link

PayPal PayFlow Link is available for merchants in the United States and Canada only. Customers are not required to have a personal PayPal account, and enter their credit card information in a form that is hosted by PayPal. The information is never stored on your Magento server. PayFlow Link cannot be used for orders that are created from the Admin.



*Configure*

Credit memos are supported for both online and offline refunds. However, multiple online refunds are not supported.

### Requirements

- PayPal Business Account**  
The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.
- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

### Customer Workflow

- 1 Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow link, and enters the credit card information.  
The customer is not required to have a personal PayPal account.
- 2 Customer Chooses Pay Now.** The customer taps the Pay Now button to submit the order.
- 3 Customer Enters Credit Card Info.** The customer enters the credit card information on a form that is hosted by PayPal/  
If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to "Canceled."
- 4 Customer Submits the Order.** The credit card information is submitted directly to PayPal, and is not retained anywhere on the Magento site.



## Order Workflow

1

**PayPal Receives Request.** PayPal receives the request from the customer to Pay Now.

2

**PayPal Verifies the Payment Information.** PayPal verifies the credit card information, and assigns the appropriate status.

**Payment Verified:** If verified, the “Pending Payment” the applicable status is initially assigned to the order until the transaction is settled.

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 <b>PayPal fraud filters</b> . The system receives the response from PayPal that the transaction is under review by Fraud Service.

**Cancel Payment.** If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to “Canceled.”

3

**Customer Is Redirected to Confirmation Page.** If the transaction completes successfully, the customer is redirected to the order confirmation page in your store.

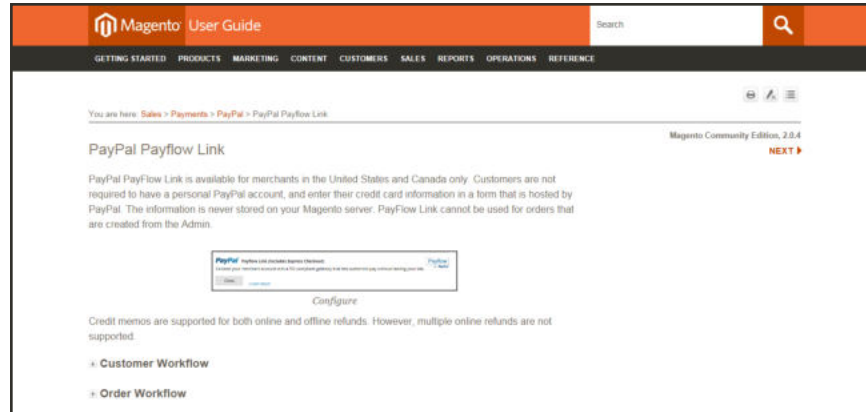
If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are managed by PayPal.

4

**Merchant Fulfills Order.** The merchant invoices, and ships the order as usual.

## Setting Up PayPal Payflow Link

For step-by-step configuration instructions, see [PayPal Payflow Link](#) in the Magento Open Sourceonline user guide.



*PayPal Payflow Link Setup*

## PayPal Reference

PAYPAL SOLUTION	DESCRIPTION
<b>EXPRESS CHECKOUT</b>	
<a href="#">PayPal Express Checkout</a>	During checkout, the customer is redirected to the secure PayPal site to complete the payment information.
<b>ALL-IN-ONE SOLUTIONS</b>	
<a href="#">PayPal Payments Advanced</a> (Includes Express Checkout)	Allows you to accept payments with a PCI-compliant checkout that keeps customers on your site.
<a href="#">PayPal Payments Pro</a> (Includes Express Checkout) <a href="#">PayPal Website Payments Pro</a> (Outside US)	Allows you to accept payments with a completely customizable checkout.
<a href="#">PayPal Payments Standard</a> (Includes Express Checkout) <a href="#">PayPal Website Payments Standard</a> (Outside US)	Adds PayPal as an additional payment method to your checkout page.
<b>PAYMENT GATEWAYS</b>	
<a href="#">PayPal Payflow Pro</a> (Includes Express Checkout)	Connects your merchant account with a fully customizable gateway that lets customers pay without leaving your site.
<a href="#">PayPal Payflow Link</a> (Includes Express Checkout)	Connects your merchant account with a PCI-compliant gateway that lets customers pay without leaving your site.
<b>OTHER PAYPAL SOLUTIONS</b>	
PayPal Integral Evolution	
PayPal Pasarela Integral	
PayPal Pro	
PayPal Website Payments Plus	
PayPal Website Payments Pro Hosted Solution	
PayPal Payments Pro Hosted Solution (includes Express Checkout)	

## PayPal Business Account

To offer PayPal as a payment method in your store, you must have a PayPal **business account** and/or a PayPal Payflow account. The account requirements are specified in the description of each PayPal solution. Your PayPal merchant account is also used to manage any **fraud filters** that are applied to purchases made from your store.

Customers who use PayPal Express Checkout or Express Checkout for Payflow Pro must have a PayPal buyer account. PayPal Payments Standard (which in some countries is called Website Payments Standard) can be used directly or through a buyer account, provided that the merchant enables PayPal Account Optional. By default, this parameter is enabled. Customers can choose to enter their credit card information, or create a buyer account with PayPal. When disabled, customers must first create a PayPal buyer account before making a purchase.

Website Payments Pro, Website Payments Pro Payflow Edition, Payflow Pro Gateway, and Payflow Link require customers to enter credit card information during checkout.

## PayPal Credit

PayPal Credit offers your customers quick access to financing, so they can buy now and pay over time, at no additional cost to you. You are not charged when customers choose PayPal Credit, and pay only your normal PayPal transaction fee.

According to a recent study, nearly 40% of PayPal Credit users say they spent more online because financing was available. Plus, their transactions are up to 68% larger than credit/debit purchases.<sup>1</sup> To learn more, see [PayPal Credit](#) on the PayPal website.

Give your sales a boost when you advertise financing. PayPal helps turn browsers into buyers with financing with PayPal Credit. Your customers can pay over time, while you get paid up front – at no additional cost to you. Use PayPal’s free banner ads that let you advertise PayPal Credit financing as a payment option when your customers check out with PayPal. The PayPal Advertising Program has been shown to generate additional purchases as well as increase consumer’s average purchase sizes by 15% or more.

You can easily add free, ready-made banner ads to pages of your site, and the PayPal Credit button to your shopping cart during checkout to remind your customers that financing is readily available.



### PayPal Credit Button

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Add a PayPal Credit button to your cart to make it easier for your customers to make a purchase.



### PayPal Credit Banners

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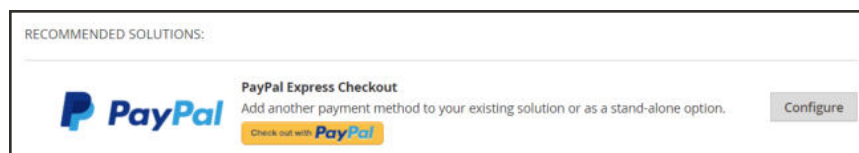
Use banners on your home page, product pages, and shopping cart to turn “window shoppers” into buyers.

For US merchants, PayPal Credit is included as a PayPal Express Checkout option, and is available with PayPal All-In-One Solutions (Payment Advanced, Payments Pro, and Payments Standard) and PayPal Payment Gateways (PayFlow Pro and PayFlow Link). Before you configure PayPal Credit for your Magento store, make sure it is enabled in your PayPal account.


### To enable PayPal Credit:

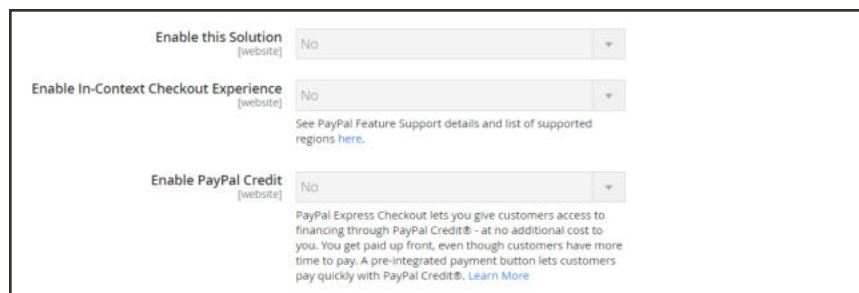
Give your customers access to financing with PayPal Credit, at no additional cost to you. You get paid up front, even though customers can pay over time. A pre-integrated payment button lets customers pay quickly with PayPal Credit.

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. For any of the following **Recommended Solutions**, tap **Configure**.
  - PayPal Express Checkout
  - Any PayPal All-In-One Solution with PayPal Express Checkout





*PayPal Express Checkout*

4. Complete the **Required PayPal Settings**. Then, expand  **Advertise PayPal Credit**.
5. Set **Enable PayPal Credit** to “Yes”.
6. Tap **Save Config**.



*Enable PayPal Credit*

### To enable PayPal Credit banners:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. For any of the following **Recommended Solutions**, tap **Configure**.
  - PayPal Express Checkout
  - Any PayPal All-In-One Solution with PayPal Express Checkout
4. Expand  the **Required PayPal Settings** section. Then, expand  the **Advertise PayPal Credit** section.

**Advertise PayPal Credit**

[Why Advertise Financing?](#)

**Give your sales a boost when you advertise financing.**

PayPal helps turn browsers into buyers with financing from PayPal Credit®. Your customers have more time to pay, while you get paid up front – at no additional cost to you. Use PayPal's free banner ads that let you advertise PayPal Credit® financing as a payment option when your customers check out with PayPal. The PayPal Advertising Program has been shown to generate additional purchases as well as increase consumer's average purchase sizes by 15% or more. [See Details.](#)

Publisher ID   
[website]

Required to display a banner

⌵ Home Page

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⌵ Catalog Category Page

---

⌵ Catalog Product Page

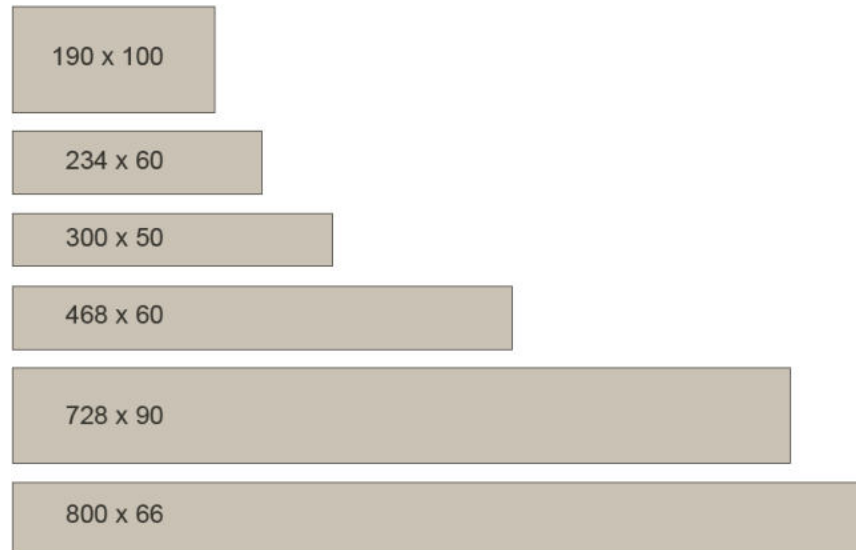
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⌵ Checkout Cart Page

*Advertise PayPal Credit*

5. Click the **Get Publisher ID from PayPal** button and follow the directions to get your account information. Then, enter your **Publisher ID**.
6. Expand ⌵ the **Home Page** section. Then, do the following:
  - a. To place a banner on the page, set **Display** to “Yes”.
  - b. Set **Position** to one of the following:
    - Header (center)
    - Sidebar (right)
  - c. Set **Size** to one of the following:
    - 190 x 100
    - 234 x 60
    - 300 x 50
    - 468 x 60
    - 728 x 90
    - 800 x 66
7. Repeat the previous step for each of the following sections:
  - Catalog Category Page
  - Catalog Product Page
  - Checkout Cart Page

8. When complete, tap **Save Config.**



*Banner Sizes*

These examples do not represent the actual size of the banners, but show their relative shape and proportion.

<sup>1</sup> As reported in Nielsen's PayPal Credit Average Order Value Study for activity occurring from April 2015 to March 2016 (small merchants) and October 2015 to March 2016 (midsize merchants), which compared PayPal Credit transactions to credit and debit card transactions on websites that offer PayPal Credit as a payment option or within the PayPal Wallet. Nielsen measured 284890 transactions across 27 mid and small merchants. Copyright Nielsen 2016.



## PayPal Fraud Management Filter

PayPal fraud management filters make it easier to detect and respond to fraudulent transactions, and can be configured to flag, hold for review, or deny riskier payments. Magento **order status** values changed according to the fraud filter settings.

### Filter Actions

ACTION	DESCRIPTION
Review	<p>If you set the filter action to “Review,” the suspected order receives the status “Payment Review” when the order is placed. You can review the order and approve, or cancel the payment in the Admin, or on the PayPal side. When you click the Accept Payment or the Deny Payment buttons, no new transactions for the order are created.</p> <p>If you change the status of the transaction on the PayPal site, you must click the Get Payment Update button in the upper-right corner of the Order page in the Admin to apply the changes. If you click Accept Payment or Deny Payment, the changes made at the PayPal site are applied.</p>
Deny	<p>If you set the filter action to “Deny,” the suspected order cannot be placed by the customer, because the corresponding transaction is rejected by PayPal. To deny the payment from the Admin, click the Deny Payment button in the upper-right corner of the page. The order status changes to “Canceled,” the transaction is reverted, and funds are released on the customer’s account. The corresponding information is added in the Comments History section of the order view.</p>
Flag	<p>If you set the filter action to “Flag”, the suspected order gets the status “Processing” when it is placed. The corresponding transaction is marked with a “flag” in the list of the merchant account transactions.</p>

# PayPal by Country

## PayPal Payment Solutions

COUNTRY	PAYPAL PAYMENT SOLUTION
Australia	PayPal Website Payments Standard <a href="#">PayPal Payflow Pro</a> PayPal Website Payments Pro Hosted Solution <a href="#">PayPal Express Checkout</a>
Canada	PayPal Website Payments Standard PayPal Website Payments Pro <a href="#">PayPal Payflow Pro</a> <a href="#">PayPal Payflow Link</a> (includes Express Checkout) <a href="#">PayPal Express Checkout</a>
France	PayPal Integral Evolution PayPal Website Payments Standard <a href="#">PayPal Express Checkout</a>
Germany	<a href="#">PayPal Express Checkout</a>
Hong Kong SAR China	PayPal Website Payments Pro Hosted Solution PayPal Website Payments Standard <a href="#">PayPal Express Checkout</a>
Italy	PayPal Pro <a href="#">PayPal Payments Standard</a> <a href="#">PayPal Express Checkout</a>
Japan	PayPal Website Payments Plus PayPal Website Payments Standard <a href="#">PayPal Express Checkout</a>
New Zealand	<a href="#">PayPal Payflow Pro</a> PayPal Website Payments Standard <a href="#">PayPal Express Checkout</a>
Spain	PayPal Pasarela Integral PayPal Website Payments Standard <a href="#">PayPal Express Checkout</a>

**PayPal Payment Solutions (cont.)**

COUNTRY	PAYPAL PAYMENT SOLUTION
United Kingdom	PayPal Payments Pro Hosted Solution (includes Express Checkout) <a href="#">PayPal Payments Standard</a> <a href="#">PayPal Express Checkout</a>
United States	<a href="#">PayPal Payments Advanced</a> (Includes Express Checkout) <a href="#">PayPal Payments Pro</a> (Includes Express Checkout) <a href="#">PayPal Payments Standard+</a> <a href="#">PayPal Payflow Pro</a> (Includes Express Checkout) <a href="#">PayPal Payflow Link</a> (Includes Express Checkout) <a href="#">PayPal Express Checkout</a>

**OTHER COUNTRIES**

PayPal Express Checkout and PayPal Website Payments Standard are available in the following countries:

Argentina, Austria, Belgium, Brazil, Bulgaria, Chile, Costa Rica, Cyprus, Czech Republic, Denmark, Dominican Republic, Ecuador, Estonia, Finland, French Guiana, Gibraltar, Greece, Guadeloupe, Hungary, Iceland, India, Indonesia, Ireland, Israel, Jamaica, Latvia, Liechtenstein, Lithuania, Luxembourg, Malaysia, Malta, Martinique, Mexico, Netherlands, Norway, Philippines, Poland, Portugal, Réunion, Romania, San Marino, Singapore, Slovakia, Slovenia, South Africa, South Korea, Sweden, Switzerland, Taiwan, Thailand, Turkey, United Arab Emirates, Uruguay, Venezuela, Vietnam





## CHAPTER 63:

# Other Payment Methods

Magento Open Source supports the following payment solutions that offer merchant services in all parts of the world. Unlike some payment solutions that transfer control to another site to complete the transaction, a payment gateway makes it possible for you to accept credit card payments directly from your store without the customer leaving your site.

- [Klarna](#)
- [Amazon Pay](#)
- [Authorize.Net Direct Post \(Deprecated\)](#)
- [Authorize.Net](#)

## Klarna

Klarna lets your customers choose how they want to pay, and supports the purchase with buyer protection and excellent customer service.

### Changes In the Latest Release

#### New Features

- The **Klarna Payments** section of the Magento configuration now links to Klarna for automated onboarding or to log in to your account.
- Magento sends **shipping details** to Klarna during an order capture.
- Klarna denies and attempts to cancel any order that is identified as fraudulent.
- Klarna supports **fixed product tax**.



#### Pay Now

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Customers can pay in full quickly and securely with Direct Bank Transfer/Direct Debit.



#### Pay Later

---

Customers can buy now, and pay later. You get paid immediately, and Klarna takes care of the rest.



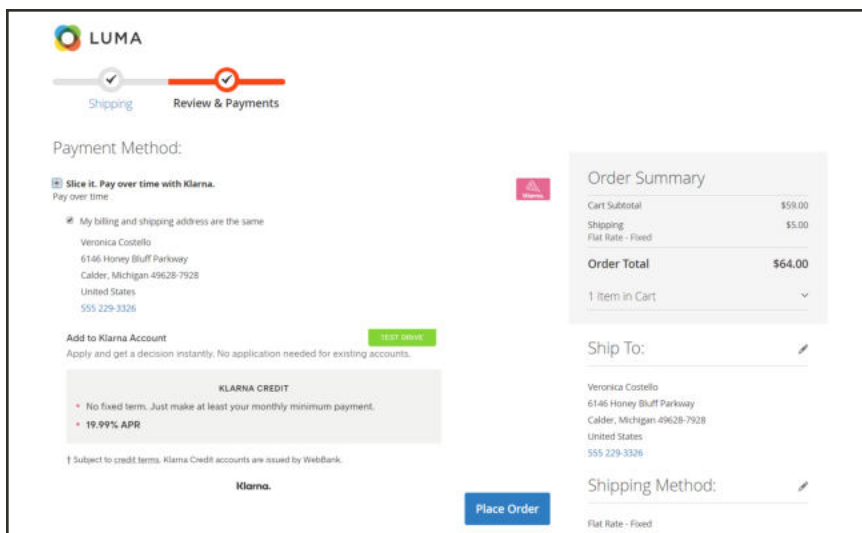
#### Slice It

---

Customers can spread the cost of their purchases over time at a low interest rate. Klarna's credit application process takes less than thirty seconds to complete.

## Klarna Customer Experience

Klarna appears as a payment method during checkout, if enabled in the configuration. If data sharing is used, Klarna can instantly prequalify the customer, and present the available solutions.



*Pay over time with Klarna*

### To pay with Klarna:

The payment solution presented might be one of the following:

#### Pay over time

1. Select **Slice it. Pay over time with Klarna.**



*Pay Over Time with Klarna*

2. Do one of the following:
  - Add the purchase to your Klarna account.
  - Apply for Klarna credit, and receive an instant decision.

3. After the terms of the credit are approved, tap **Place Order**.

## Pay later

1. Select **Pay later**.

The terms appear below. In this example, no sign-up is needed, and the customer can pay in 14 days.

The screenshot shows the LUMA checkout interface. At the top, there's a progress bar with 'Shipping' and 'Review & Payments' steps. The 'Review & Payments' step is active. Below the progress bar, the 'Payment Method:' section is visible. The 'Pay later' option is selected, and a checkbox indicates 'My billing and shipping address are the same'. The shipping address is: Veronica Costello, 6146 Honey Bluff Parkway, Calder, Michigan 49628-7978, United States, (555) 229-3326. Below this, it says 'Pay 14 days after delivery' and 'No sign-up needed'. There are three bullet points: 'One more click and you're all set.', 'Pay in 14 days - we'll remind you.', and 'Pay with credit card or your bank account.'. A 'TEST MODE' button is also present. At the bottom of this section, it says 'Complete the purchase to apply for Klarna's offer of credit to pay \$114.75 within 14 days of shipping. Late fees apply. You agree to pay after delivery terms and to receive these terms electronically.' and the Klarna logo. To the right, the 'Order Summary' shows: Cart Subtotal \$106.00, Shipping \$0.00, Magento Shipping - UPS delivery options \$0.00, Tax \$8.75, and Order Total \$114.75. Below the order summary, there's a 'Ship To:' section with the same address as above. At the bottom, there's a 'Shipping Method:' section with 'Magento Shipping - UPS delivery options' selected. A blue 'Place Order' button is at the bottom right.

### *Pay Later*

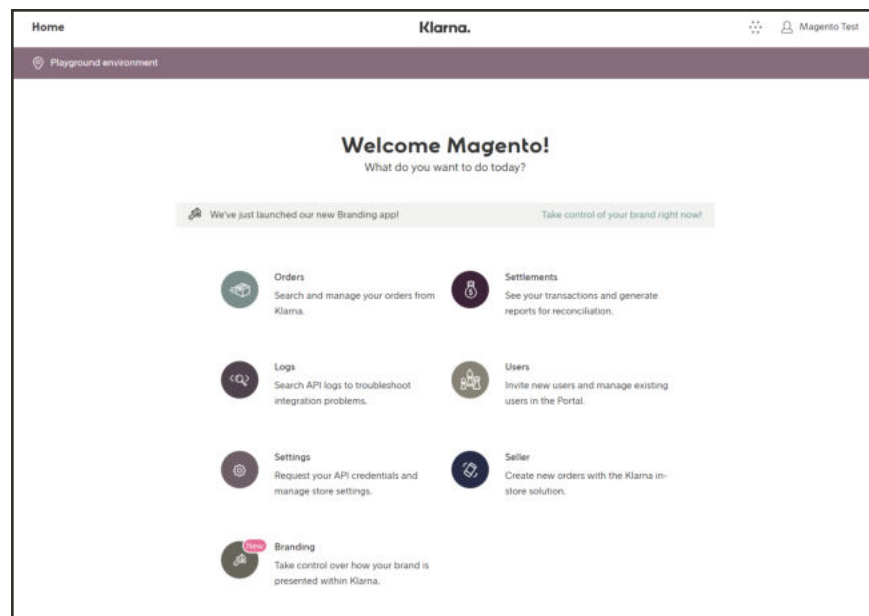
2. To pay later with Klarna according to the terms specified, tap **Place Order**.



## Setting Up Klarna

To offer your customers the benefit of paying with Klarna, you must first sign up for a Klarna account and gain access to the Klarna Merchant Portal. Then, complete the Klarna configuration from the Admin of your Magento store.

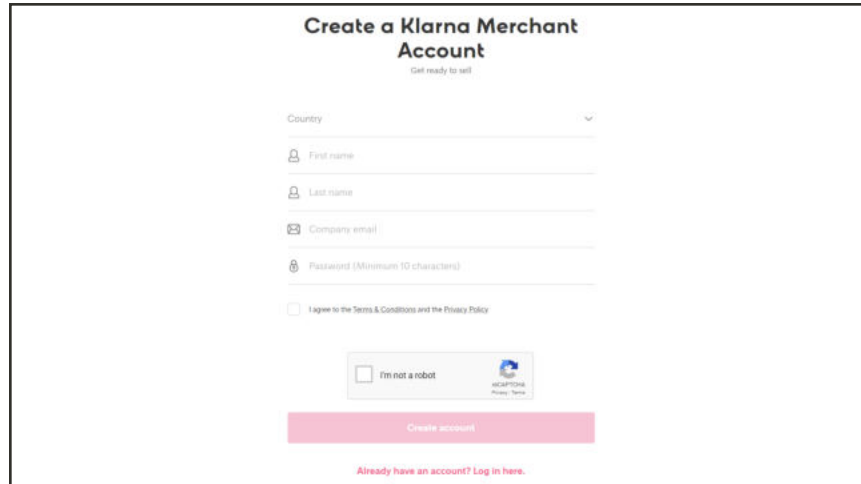
**Important:** Klarna does not support currency switches to display multiple currencies in one website. Magento uses a base currency and tax configured at the website level (not store view) to avoid rounding and mismatch issues. To support multiple currencies, create a website per currency, using different URLs configured at the Magento website level (not store view).



*Klarna Merchant Portal*

### Step 1: Set Up Your Klarna Account

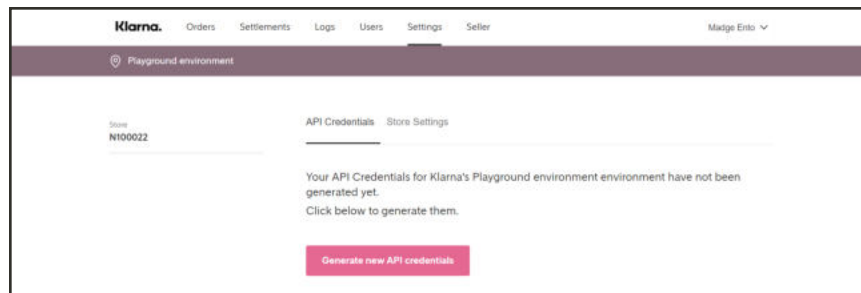
1. Do the following from the Admin of your Magento installation:
  - a. In the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
  - b. In the panel on the left under **Sales**, choose **Payment Methods**.
  - c. In the **Klarna** section, tap **Configure**. Then under **Klarna Payments**, click the link to visit the Klarna Merchant Onboarding page.
2. Do one of the following:
  - To create a new account, complete the Onboarding form to create a Klarna merchant account. Then, tap **Create account**.
  - If you already have an account, click **Log in here**.



3. To generate your API Credentials for Klarna’s Playground environment, do one of the following:
  - Tap the **Settings** icon.
  - In the main menu, choose **Settings**.

Then, do the following:

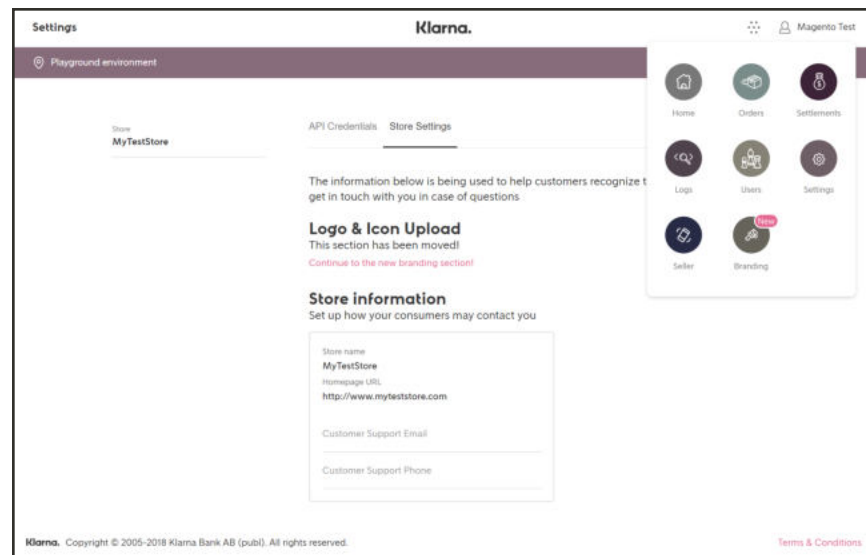
- a. On the **API Credentials** tab, tap **Generate new API credentials**.
- b. **Copy** your credentials to a text editor like Notepad. You will need them later to complete the Magento configuration.



*Generate API Credentials*

4. If necessary, sign in to your Klarna account. Then on the **Store Settings** tab, do the following:
  - a. Take note of your **Store ID** in the upper-left corner of the page. Copy and paste the value into a text editor like Notepad, along with your API credentials.
  - b. Complete the following store information:

- Store name
- Homepage URL
- Customer Support Email
- Customer Support Phone

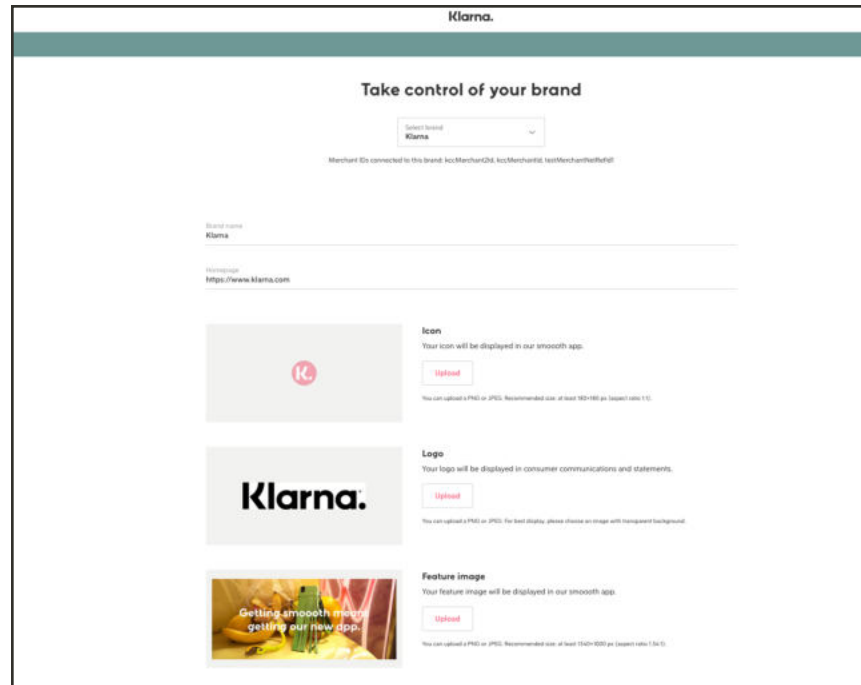


*Store Settings*

- c. In the upper-right corner, click the **Menu** icon ( ☰ ). Then, choose **Branding**.


If your logo and icon files are ready, follow the onscreen instructions to upload them to the Klarna portal. If the files aren't ready, you can complete this step later.

Icon	Your icon appears in the Klarna app. Recommended size: 180 x 180 pixels Aspect ratio 1:1 Supported File types: PNG or JPG (JPEG)
Logo	Your logo appears in communications and statements sent to customers. For best results save your logo as a PNG file with a transparent background. Supported File types: PNG or JPG (JPEG)
Feature Image	Your feature image appears in the Klarna app. Recommended size: At least 1340 x 1000 pixels. Aspect ratio: 1.34:1 Supported File types: PNG or JPG (JPEG)




*Branding*

## Step 2: Configure Magento

1. Open another browser tab, and log in to the Admin of your Magento store.
2. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
3. In the upper-left corner, choose the **Store View** where the configuration applies. If your installation has only one view, accept the “Default Config” setting.
4. In the panel on the left, under **Sales**, choose **Payment Methods**. Under **Other Payment Methods**, expand  the **Klarna** section. Then, tap **Configure**.

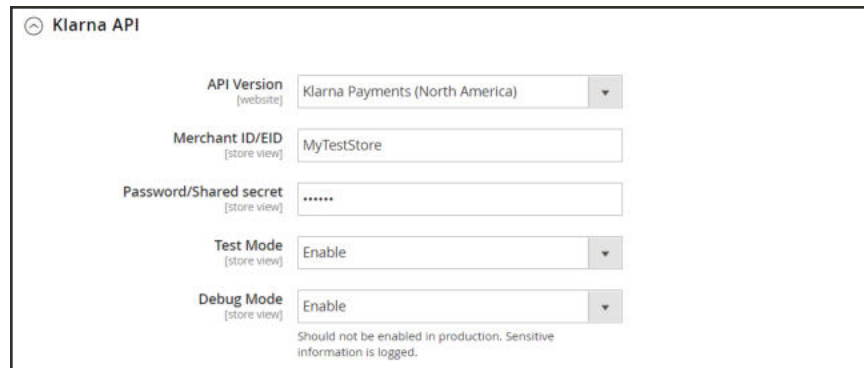


*Klarna*

5. Expand  the **Klarna API** section. Then, do the following:
  - a. Set **API Version** to one of the following:
    - Klarna Payments (Europe)  
Supported countries: AT, DE, DK, FI, NL, NO, SE, UK
    - Klarna Payments (North America)

- b. In the **Merchant ID/EID** field, enter the **Store ID** from your Klarna account.
- c. Enter the **Password/Shared secret** from your Klarna account.
- d. To use the Klarna Playground for test transactions, set **Test Mode** to “Yes.”
- e. To generate a record of interactions while testing the integration, set **Debug Mode** to “Yes.”

Turn Debug Mode off before going live with Klarna in your production store.



### *Klarna API*

6. Expand ☺ the **Klarna Payments** section. then, do the following:
  - a. Set **Enable this Solution** to “Yes.”
  - b. Set **Payment from applicable countries** to one of the following:
 

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - c. (U.S. Only) If you want Klarna to prepare set of personalized credit options for each customer, set **Data sharing** to “Yes.”
  - d. Enter a **Sort Order** number to determine the position of Klarna in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

### *Klarna Payments*

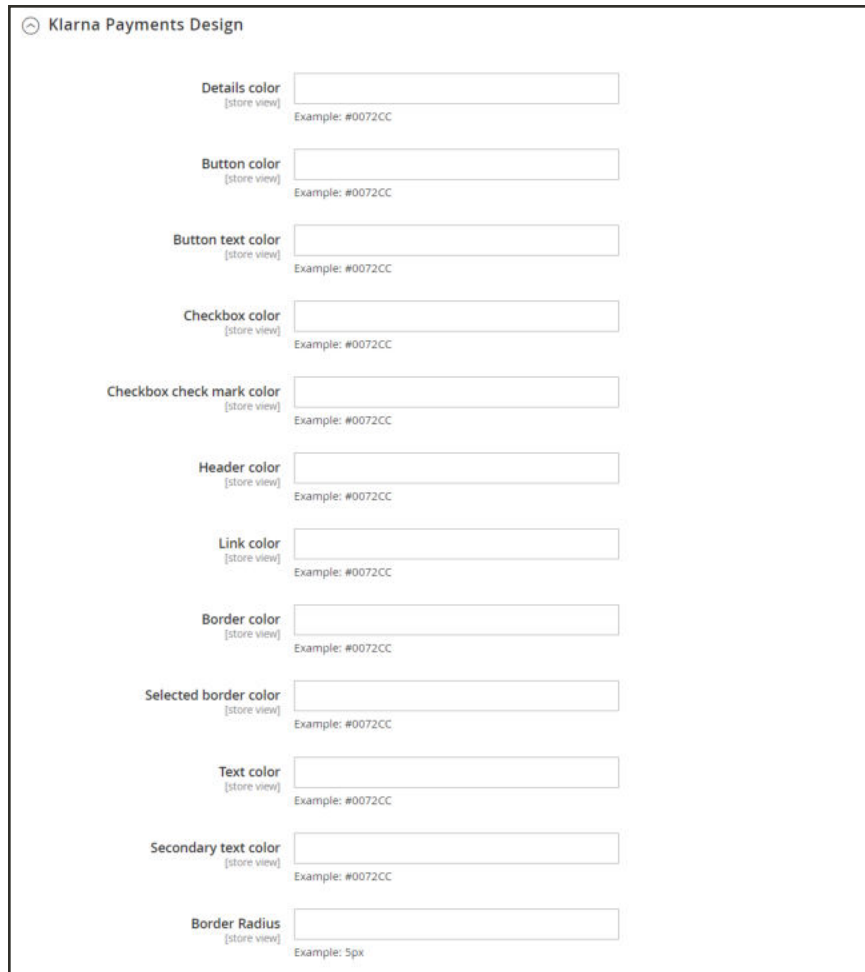
7. If you want to stop here, tap **Save Config.**
8. When prompted, click the **Cache Management** link at the top of the page. Then, refresh all invalid caches.

### **Step 3: Complete the Design Settings** (Optional)

You can complete the Klarna Payment Design Settings now, or at a later time. You might use a color picker to experiment with different colors for each element to match your store's theme. The results might vary, depending on theme.

Enter the hexadecimal value of the color that you want to use for each element.

- Details color
- Button color
- Button text color
- Checkbox color
- Checkbox check mark color
- Header color
- Link color
- Border color
- Selected border color
- Text color
- Secondary text color
- Border radius



⌵ Klarna Payments Design

Details color [store view] Example: #0072CC

Button color [store view] Example: #0072CC

Button text color [store view] Example: #0072CC

Checkbox color [store view] Example: #0072CC

Checkbox check mark color [store view] Example: #0072CC

Header color [store view] Example: #0072CC

Link color [store view] Example: #0072CC

Border color [store view] Example: #0072CC

Selected border color [store view] Example: #0072CC

Text color [store view] Example: #0072CC

Secondary text color [store view] Example: #0072CC

Border Radius [store view] Example: 5px

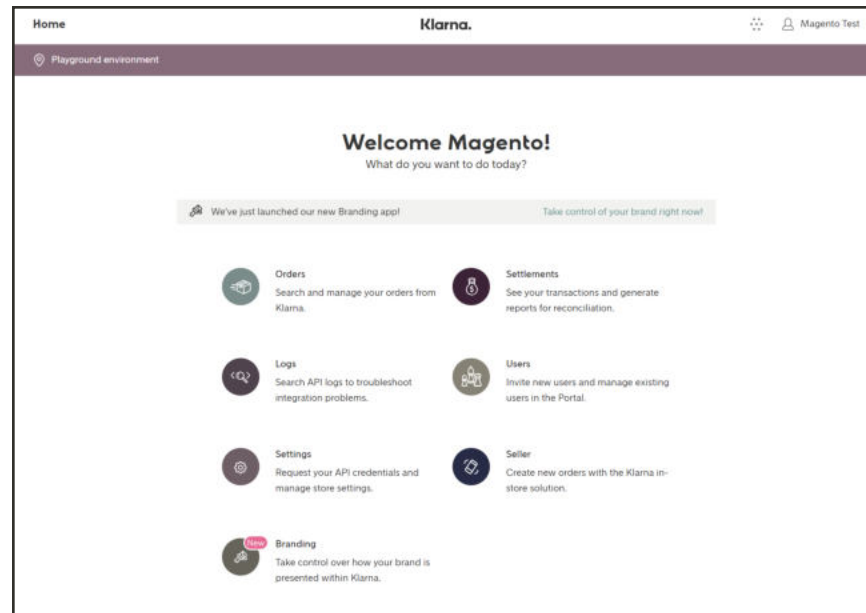
*Klarna Payments Design*

9. When complete, tap **Save Config**. Then when prompted, click the **Cache Management** link at the top of the page to refresh all invalid caches.

## Managing Your Account

The Klarna Merchant Portal makes it easy to manage orders, view transactions, and generate reconciliation reports. You can also manage your Klarna account settings, and add new users to your account.

Orders are captured with shipping details from the Magento Admin. Klarna also supports post order processing for events such as cancellations, refunds, and fraud.



*Klarna Merchant Portal*

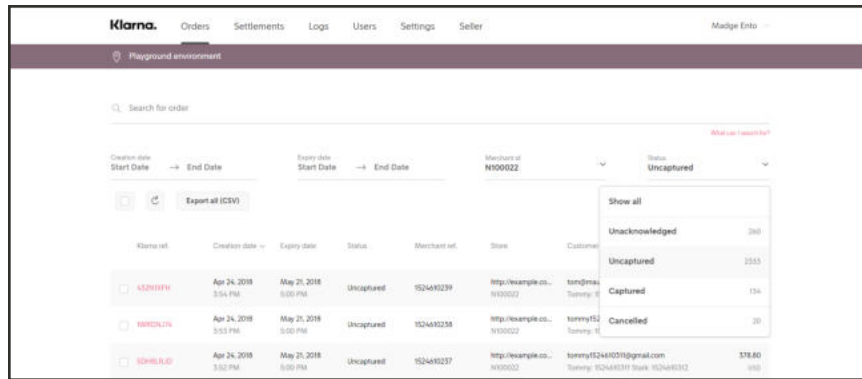
### To manage orders:

1. Do one of the following:
  - In the main menu, choose **Orders**.
  - On the Klarna dashboard, choose **Orders**.
2. Follow the instructions to do any of the following:

### Find an Order

1. To filter the list, set **Status** to one of the following:
  - Unacknowledged
  - Uncaptured
  - Captured
  - Cancelled

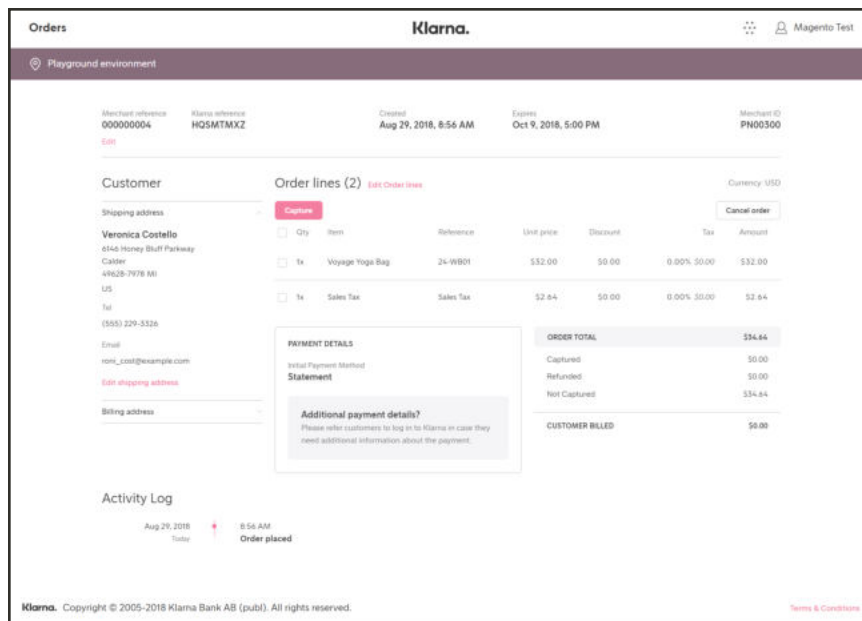




*Show*

2. To find a specific order, enter any of the following into the **Search for order** box:
  - Customer name and email
  - Merchant reference
  - Klarna reference
  - Order ID
3. To view the order detail, click the linked **Klarna reference number** in the first column.

The amount of detail that is included in the report depends on your configuration. For example, if **Fixed Product Taxes** are enabled and applicable to the order, the amount appears in the product line item.



*Order Detail*

## Export Orders

1. Tap **Export all (CSV)**.
2. Look for the export file in your browser’s downloads list. Then, open the file in a spreadsheet application.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	order_id,klarna_reference,merchant_reference1,merchant_reference2,created_at,expires_at,merchant_id,merchant_name,billing_address_e												
2	4be3759d-4489-52c9-91aa-b2bb08610669;VXS1VB4Z;100000059;";2017-02-16T20:14:45.145+00:00";2017-03-16T00:00:00.000+00:00"												
3	a9f602df- Suite 300;"43215";"Columbus";"US";"16149291287";"account";"70.00";"USD"												
4	5b043d40-6464-6e65-859e-ad80045a6281;"B5N5G5W4";";";"2017-02-22T23:56:40.852+00:00";"2017-03-22T00:00:00.000+00:00";"N10002"												
5	fd184ee8- Suite 300;"43215";"Columbus";"US";"16149291287";"statement";"143.00";"USD"												
6	fd0f648b-590e-527e-a119-1e5cf6bafed;"W2T01KD1";"100000064";";";"2017-03-02T16:57:16.163+00:00";"2017-03-30T00:00:00.000+00:00";												
7	7e6f78fd- Suite 300;"43215";"Columbus";"US";"+1 614-929-1287";"statement";"70.00";"USD"												
8	58226b52- Suite 300;"43215";"Columbus";"US";"6144997453";"account";"230.00";"USD"												
9	b8cdc644- Suite 300;"43215";"St. Columbus";"US";"6144997453";"account";"275.00";"USD"												
10	c3b6e81c- Suite 300;"43215";"Columbus";"US";"16149291287";"account";"250.00";"USD"												
11	fc495768- Suite 300;"43215";"Columbus";"US";"6144997453";"account";"64.00";"USD"												
12	a719a73b-0e8e-6649-ad75-e2b4b65cb85c;"QZ2J1H9H";"145000098";";";"2017-03-10T15:51:08.996+00:00";"2017-04-07T00:00:00.000+00:00"												
13	b3fc053c- Suite 300;"43215";"Columbus";"US";"+1 614-999-7453";"statement";"51.82";"USD"												
14	76ad0a42- Suite 300;"43215";"Columbus";"US";"+1 614-999-7453";"account";"70.00";"USD"												
15	e49c1dad-24c0-6f60-8dc9-001af182b9aa;"XCN2XWB7";"2000000026";";";"2017-04-06T01:10:38.506+00:00";"2017-05-04T00:00:00.000+00:00"												
16	e7ae5e72- Suite 300;"43215";"Columbus";"US";"+1 614-999-7453";"statement";"70.27";"USD"												
17	5155c716- Suite 300;"43215";"Columbus";"US";"+1 614-999-7453";"statement";"00.00";"USD"												
18	4dbb5075-faa2-646e-8533-a29508c7932c;"8N1GQR89";"145000104";";";"2017-04-10T14:15:46.915+00:00";"2017-05-08T00:00:00.000+00:00"												
19	c5655a7e-9fbe-6f05-8599-552824fdded8;"3XP5QDIZ";"145000107";";";"2017-04-10T15:49:12.698+00:00";"2017-05-08T00:00:00.000+00:00";												
20	0a7ffdff-4185-6949-ae41-88129982ed8e;"QJ5Q2FW1";"145000108";";";"2017-04-12T19:45:44.707+00:00";"2017-05-10T00:00:00.000+00:00"												
21	9d85b878-89e5-6e70-b6db-b1aca5d99fc9;"V549F5L5";"145000115";";";"2017-04-12T19:55:01.416+00:00";"2017-05-10T00:00:00.000+00:00";												
22	3035676b-c0c9-58a2-83fa-09867f8fc5ef;"Q8DDC935";"100000006";";";"2017-04-15T03:05:09.319+00:00";"2017-05-13T00:00:00.000+00:00";												
23	a2675865-b940-5238-9d02-b4d2b1000332;"FTRDWKC3";"100000009";";";"2017-04-17T17:49:31.171+00:00";"2017-05-15T00:00:00.000+00:00"												
24	046f33cf-687c-5944-af38-b2447437877b;"DOH76PXL";"100000070";";";"2017-04-17T14:45:24.237+00:00";"2017-05-15T00:00:00.000+00:00";												

*Exported Orders in Excel*

## Post Processing Events

EVENT	ACTION
Canceled Order	Sends cancel to Klarna.
Full/Partial Capture	Sends capture to Klarna.
Full/Partial Refund	Sends refund to Klarna.
Deny	If an approved order is later identified as fraudulent, Klarna requests the merchant to try to prevent the order from being delivered. In addition, Klarna attempts to cancel the order automatically by sending notification to Magento.

## Amazon Pay

Amazon Pay and Login with Amazon offer your customers a secure and convenient way to pay that is easy to set up, and that helps to increase conversions and sales. Customers who log in to your store with their Amazon credentials can speed through checkout using the payment and shipping information that is already stored in their Amazon accounts.

For international merchants with a region in EU or UK, Amazon Pay provides a **multi-currency feature**. If you list prices in more than one currency, this feature allows a customer to select their currency and pay the exact amount quoted on the site, without concern for conversion or rates.

### Changes In the Latest Release

#### New Features

- Amazon Pay now support **Klarna Payments**.
- Multi-currency option for EU and UK international merchants. Configure this setting through the **Amazon Pay setup**.



### Shop Safely

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Customer purchases are protected by **Amazon's A-to-z Guarantee**. Customer password and payment information is never shared.



### Speed Through Checkout

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During checkout, shipping and payment information is read directly from the customer's Amazon Payments account.



## Log in with Amazon

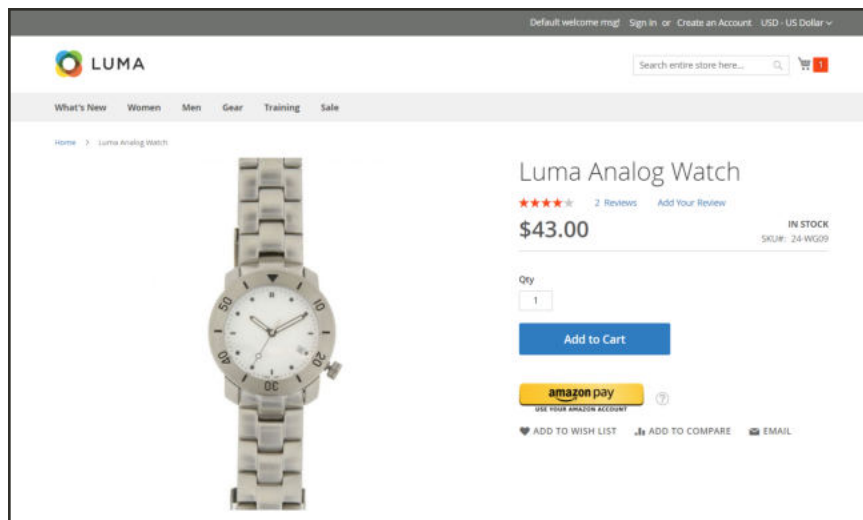
---

Customers can use their Amazon password to log in to their account with your store.

## Amazon Pay Customer Experience

Customers can speed through checkout by using the payment methods and shipping addresses that are available in their Amazon accounts. Your store can be configured to show the Amazon Pay button on **product pages**, and in the **cart sidebar**, **shopping cart**, and during **checkout**.

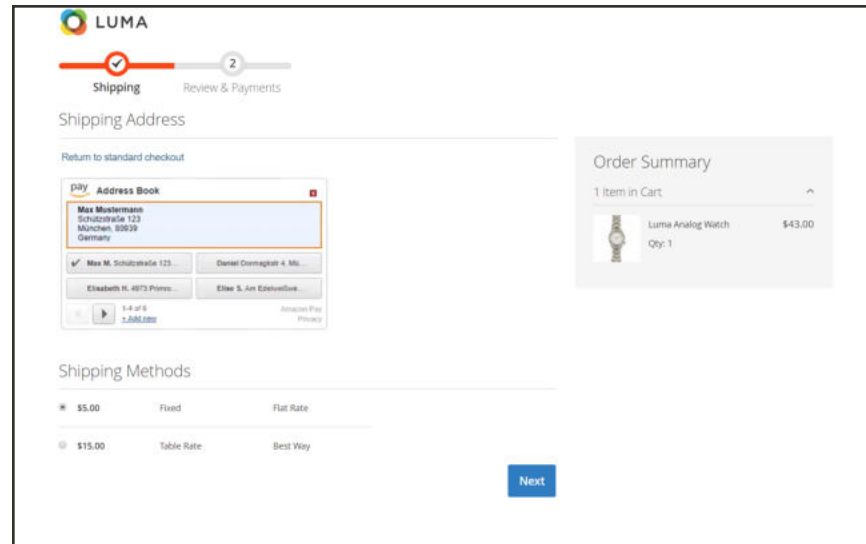
For international customers, they may also have an option to select their preferred currency if you list prices in more than one currency. This multi-currency support allows customers to complete purchases without worrying about currency conversions or rates.



*Amazon Pay on Product Page*

## To place an order with Amazon Pay:

1. To begin the checkout process, tap **Amazon Pay**. Then when prompted, enter your Amazon credentials.

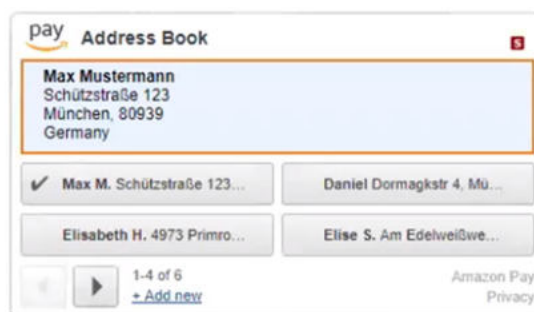


*Shipping Addresses*

2. Choose the **shipping address** from your Amazon Address Book.

The pagination indicator shows how many addresses are available. However, only four can be viewed at a time.

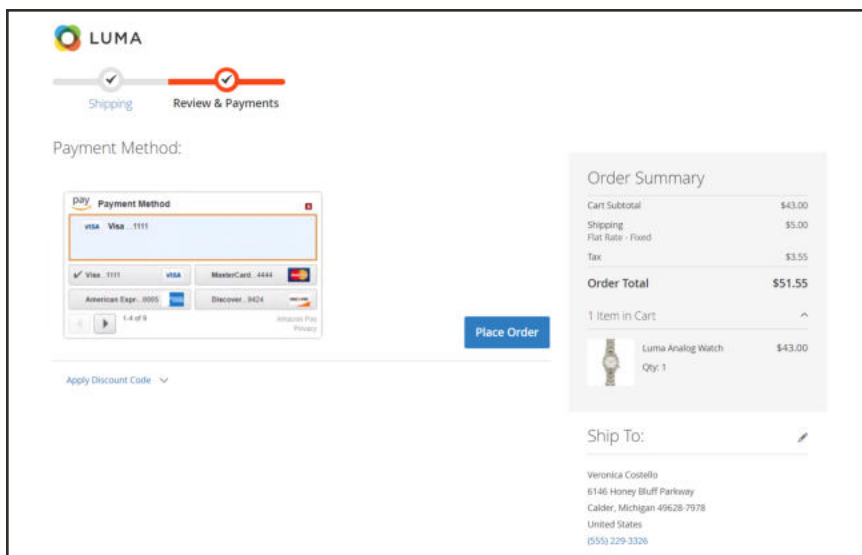
- Click the **arrow** ( ▶ ) to view all available options.
- To add a new address to the Address Book, click **Add new**.
- If you prefer, click **Return to standard checkout**.



*Amazon Pay Address Book*


3. Choose the **Shipping Method** that you want to use for the order. Then, tap **Next**.

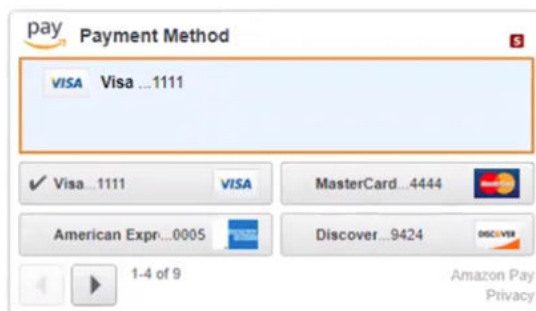
- 4. During the **Review & Payments** checkout step, the standard Magento payment methods are replaced with the payment methods that are available in your Amazon account.



*Review & Payments*

The pagination indicator shows how many payment methods are available. However, only four can be viewed at a time.

- Click the **arrow** (  ) to view all available options.
- Choose the **Payment Method** that you want to use for the purchase.




*Amazon Pay Payment Method*

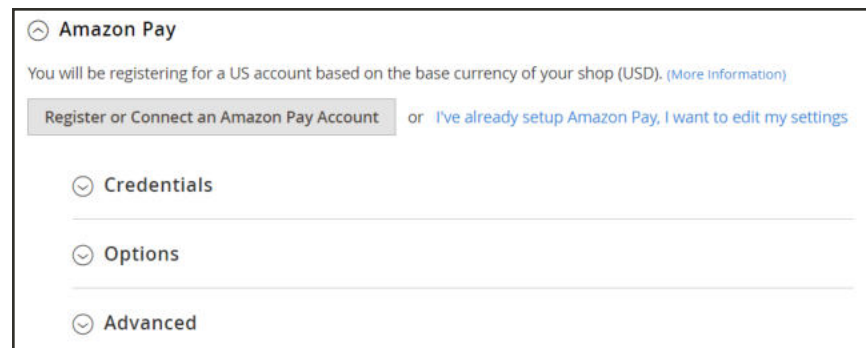
- 5. Enter a **Discount Code**, if applicable.
- 6. Review the order. Then, tap **Place Order**.

## Setting Up Amazon Pay

Amazon Pay and Login with Amazon work together to create a great buyer experience. To learn more, see the [Amazon Pay and Login with Amazon](#) documentation for Magento 2.

### To set up Amazon Pay:

1. On the Admin menu, choose **Stores**. Then under **Settings**, choose **Configuration**. Then, do the following:
  - a. In the upper-right corner, set the **Store View** chooser to establish where the Amazon Pay configuration applies.
  - b. In the panel on the left under **Sales**, choose **Payment Methods**. Then under **Other Payment Methods**, expand  the **Amazon Pay** section.



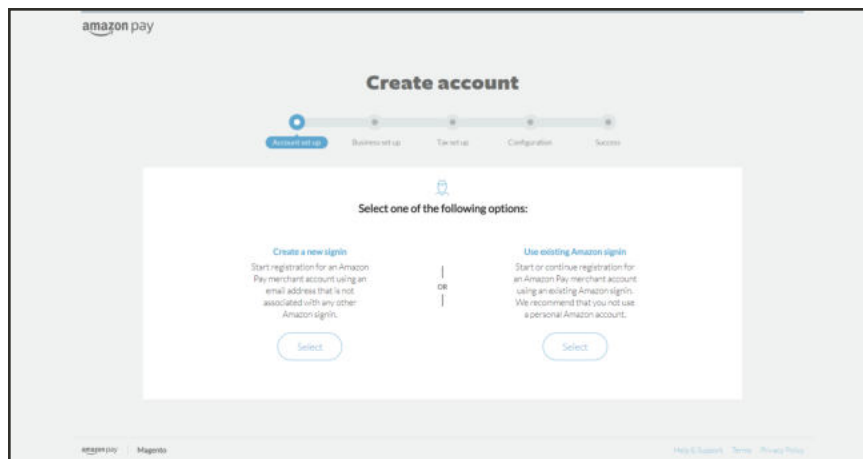
### *Amazon Pay*

2. Under **Amazon Pay**, tap **Register or Connect an Amazon Pay Account**.

Do not use your personal Amazon account for Amazon Pay.




- a. If you do not yet have an Amazon merchant account, choose **Create a new signin**, and tap **Select**. Then, follow the onscreen instructions to create a new account.



*Create Amazon Pay Account*

- b. If you already have an Amazon merchant account, choose **Use existing Amazon signin**, and tap **Select**. Then, complete the following sections:

## Credentials

- Expand  the **Credentials** section. Your credentials are transferred automatically from your Amazon Pay account to the Magento Admin. Your credentials can also be found in Amazon Seller Central in both Production and Sandbox modes.

To use test credentials from the Amazon Pay Sandbox, do the following:

- Get your **Test Credentials** for the Amazon Pay Sandbox.
- In the Magento Amazon Pay configuration under Credentials, mark the **Test Credentials** checkbox.
- Enter the following credentials that you copied from the **Amazon Pay Sandbox** on Amazon Seller Central:
  - Merchant Id
  - Access Key Id
  - Secret Access Key
  - Client ID
  - Client Secret
- Set **Sandbox** to “Yes.”

When you are through testing and ready to go live with Amazon Pay, return to the configuration and clear the **Test Credentials** checkbox. Then, set Sandbox to “No” and tap **Save Config**.

2. Verify the **Payment Region** for the store.

**Credentials**

**Merchant Id** [store view]

**Access Key Id** [store view]

**Secret Access Key** [store view]

**Client Id** [store view]

**Client Secret** [store view]

Test Credentials

**Credentials JSON** [store view]

Warning! Individual credential fields will be populated/overwritten, if credentials JSON is supplied!

**Payment Region** [store view] -- Please Select --

**Sandbox** [website] No

**Allowed Javascript Origins** [store view] https://bundle-dzxnmxl-wg7prcsbxdtq.eu-3.magentosite.cloud

**Allowed Return URLs** [store view] https://bundle-dzxnmxl-wg7prcsbxdtq.eu-3.magentosite.cloud/amazon/login/processAuthHash/

**IPN URL** [store view] https://bundle-dzxnmxl-wg7prcsbxdtq.eu-3.magentosite.cloud/amazonpayments/payment/ipn/

### *Credentials*

3. When complete, tap **Save Config**.

Look for the message, “Your Amazon configuration is valid” at the top of the Configuration page.

- If your credentials are valid, continue with the configuration.
- Otherwise, correct your credentials, and try again.

## Options

1. Expand ☺ the **Options** section.
2. Set **Enable Amazon Pay** to “Yes.”
3. Set **Enable Login with Amazon** to “Yes.”
4. Set **Payment Action** to one of the following:
 

Charge on Shipment	(Default) Amazon receives a capture request and charges the customer when an invoice is created in Magento.
Charge on Order	Amazon creates the invoice and charges the customer when the order is placed.
5. Set **Authorization Mode** to one of the following to determine the method that is used to transmit authorization data.
 

Immediate	(Default) Makes the disposition of an authorization available within a couple of seconds.
Automatic	(Recommended) Uses synchronous authorization if possible, and switches to asynchronous processing as needed, for some declines. The change in processing modes is transparent to the user. The status of sales order is “Pending” while the disposition of authorization is outstanding.
6. Set **Update Mechanism** to one of the following:
 

Data Polling via Cron job	(Default) Uses the standard Magento notification process that is scheduled by <b>Cron</b> job.
Instant Payment Notifications	(IPN) Sends notifications to the Instant Payment Notification URL.

Options

**Enable Amazon Pay** [store view] No

**Enable Login with Amazon** [store view] No

Note that If Login with Amazon is disabled and Guest Checkout is disabled, the customer will not be able to use Amazon Pay.

**Payment Action** [store view] Charge on Shipment

**Authorization Mode** [store view] Immediate

**Update Mechanism** [global] Data Polling via Cron Job

*Options*

## Advanced Settings

1. Expand the **Frontend** section. Then, do the following as applicable:
  - a. (Optional) If your store is available in multiple languages, you can display the text on the Amazon Pay button in a different language for each **store view**. To override the default display language for the current store view, enter one of the following language parameters in the **Button Display Language** field:

en-GB	English (Great Britain)
de-DE	German (Germany)
fr-FR	French (France)
it-IT	Italian (Italy)
sp-SP	Spanish (Spain)

To learn more, see [Language](#) in the Amazon Pay Integration Guide.

- b. Set **Button Color** to one of the following:

- Gold
- Light Gray
- Dark Gray

To learn more, see the [Merchant Tools](#) page on the Amazon Pay website.

- c. Set **Button Size** to one of the following:

- Small
- Medium
- Large
- Extra Large

- d. Choose “Yes” for each feature that you want to enable for the current store view:

- Login with Amazon available in authentication popup
- Amazon Pay button on Product Page
- Amazon Pay button in minicart
- Display Amazon Pay Method

⊖ **Frontend**

**Button Display Language** [store view]

Controls button and widget language. The default is your shop's locale. Available options can be found [here](#). Applies only to UK and DE Amazon Merchant Accounts.

**Button Color** [website]

**Button Size** [website]

**Login with Amazon available in authentication popup** [store view]

**Amazon Pay button on Product Page** [store view]

**Amazon Pay button in minicart** [store view]

**Display Amazon Pay Method** [store view]

If enabled, Amazon Pay is presented as an option in the list of available payment methods during the final step of checkout.

*Frontend*

- Expand the **Sales Options** section. Then, enter the **Store Name**.

⊖ **Sales Options**

**Store Name** [store view]

*Sales Options*

- If you have a payment region in EU or UK, you may have an option for **Use Multi-currency**.

Amazon Pay multi-currency feature is supported for the payment regions EU and UK.

Amazon Pay multi-currency supports:

- Australian Dollar (AUD)
- British Pound (GBP)
- Danish Krone (DKK)
- Euro (EUR)
- Hong Kong Dollar (HKD)
- Japanese Yen (JPY)
- New Zealand Dollar (NZD)

- Norwegian Krone (NOK)
- South African Rand (ZAR)
- Swedish Krone (SEK)
- Swiss Franc (CHF)
- United States Dollar (USD)

☰ Sales Options

Use Multi-currency [global] No

Amazon Pay currently supports multi-currency only for UK and EU endpoints. Currencies supported include: AUD, GBP, DKK, EUR, HKD, JPY, NZD, NOK, ZAR, SEK, CHF USD.

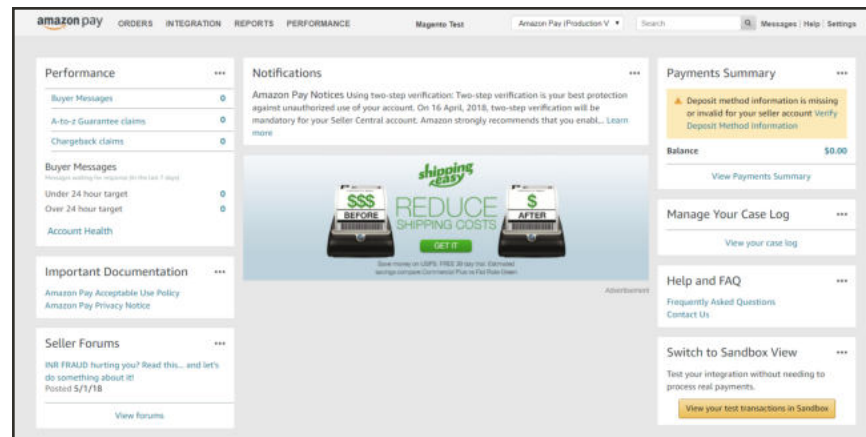
Store Name [store view]

### *Sales Options*

4. When complete, tap **Save Config.**
5. In the message at the top of the page to refresh cache types, click **Cache Management.** Then, do the following:
  - a. Mark the checkbox of each invalid cache.
  - b. With the control set to “Refresh,” tap **Submit.**

## Using Amazon Seller Central

Use the chooser at the top of the page to change the view of Amazon Seller Central. The options include all the Amazon resources that are associated with your account. Each view is a separate dashboard with specific resources for the view.



*Amazon Seller Central (Production View)*

### To change views:

Set the chooser to the view that you want to see. The following views relate to the Magento integration of Amazon Pay:

- Amazon Pay (Sandbox View)
- Amazon Pay (Production View)
- Login with Amazon

### To find your credentials:

To run test transactions from the Amazon Pay Sandbox, you must copy the keys from your account on Amazon Seller Central. Then, enter the keys into the Magento Amazon Pay configuration. Your credentials can be found in both the Production and Sandbox views of Amazon Seller Central.

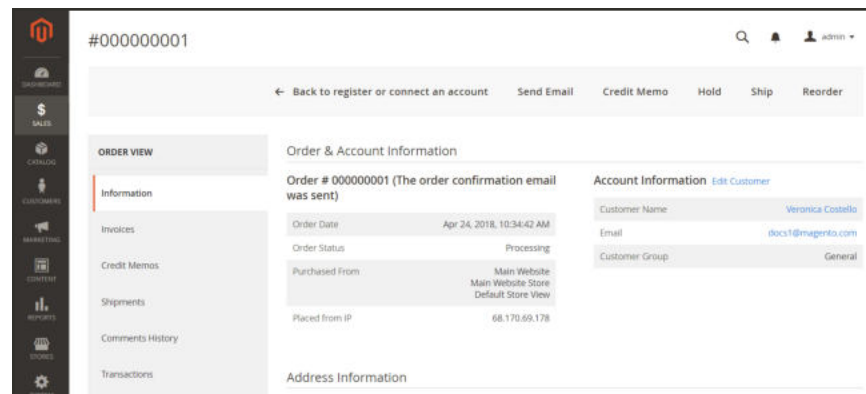
1. Log in to your seller account on **Amazon Seller Central**.
2. Set the chooser to one of the following:
  - Amazon Pay (Production View)
  - Amazon Pay (Sandbox View)
3. On the main menu, under **Integration**, choose **MWS Access Keys**. Then, do the following:





## Managing Amazon Pay Transactions

All purchases made in your store and processed by Amazon Pay can be viewed from the Amazon Pay website. If you receive a request for a refund, follow the normal Magento process to issue a **credit memo** and make a refund. The Credit Memo button appears after a sales order is invoiced.



*Invoice with Credit Memo Button*

### To issue a refund:

1. On the Admin sidebar, choose **Sales**. Then on the menu, choose **Orders**.
2. Find the completed order to be refunded. Then in the **Action** column, click **View**.
3. In the button bar, tap **Credit Memo**.
4. Scroll down to the bottom of the page, and confirm the **Refund Totals**.
5. When complete, tap **Refund Online**.

For more detailed instructions, see: [Issuing a Credit Memo](#).

### To view Amazon Pay activity:

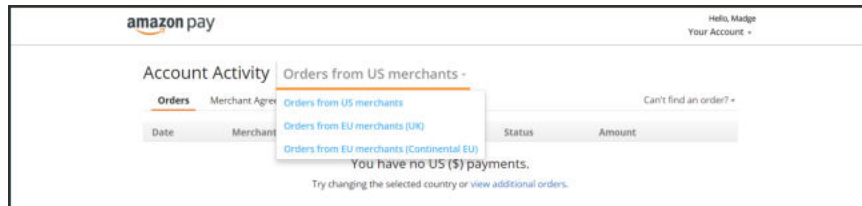
1. Go to [pay.amazon.com](https://pay.amazon.com).
2. In the header at the **Sign In** prompt, choose **Merchants**. Then, do the following:



*Merchant Sign In*

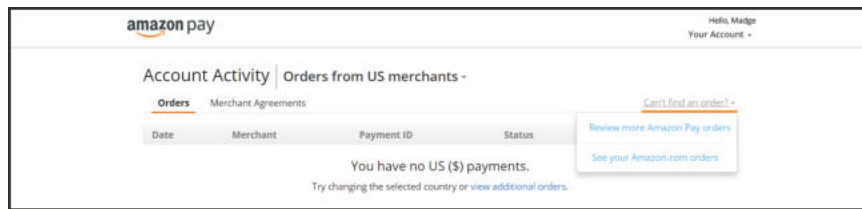
3. When prompted, do the following:

- a. Enter your **email address** or **mobile number**.
  - b. Enter your **password**.
  - c. Tap **Sign in**.
4. To view orders from a specific region, choose the region from the **Account Activity** control.



*Orders from Region*

5. To find an order, click **Can't find an order?** Then, choose the Amazon service that processed the order.



*Can't find an order?*

## Amazon Pay Resources

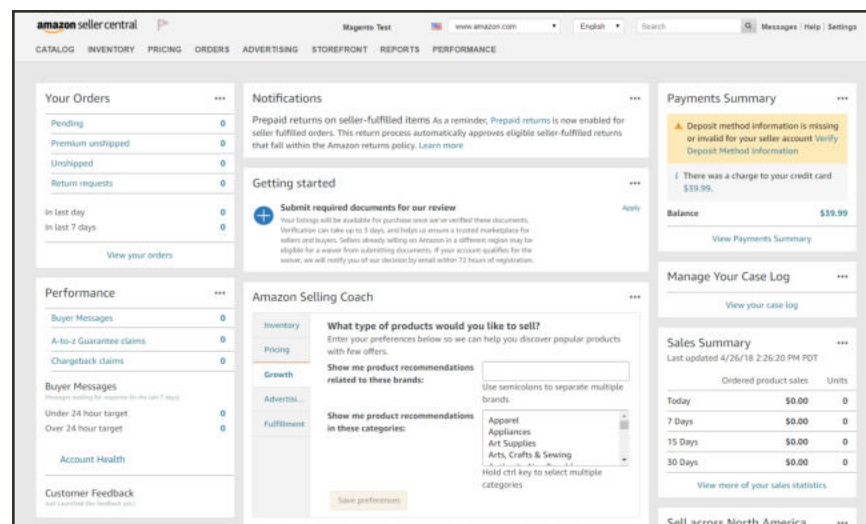
Amazon Seller Central has a wealth of information and tools to help you manage your Amazon Pay account. To learn more, see the online help and documentation on Amazon Seller Central.



*Amazon Pay Website*

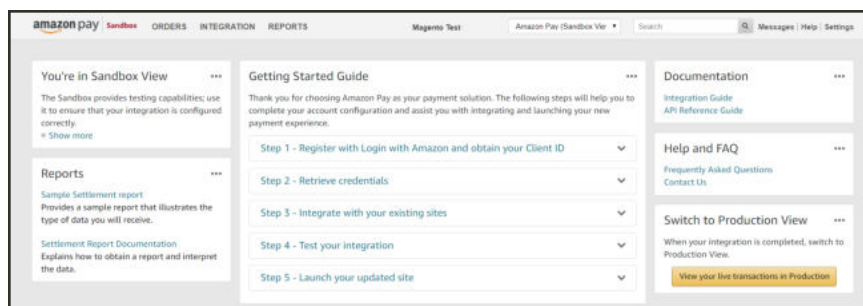
### To find help:

1. Log in to your Amazon seller account on **Seller Central**.
2. In the upper-right corner, click **Help**.



*Amazon Seller Central*

3. In the header, set the integration chooser to “Amazon Pay (Sandbox View).”
  - The **Getting Started Guide** in the center of the page offers step-by-step instructions for implementing Amazon Pay.
  - You’ll find additional guides for developers in the right sidebar under **Documentation**, and additional resources under **Help and FAQ**.



*Getting Started Guide*

## Authorize.net Direct Post (Deprecated)

Authorize.Net handles all steps in the transaction process — such as payment data collection, data submission, and response to the customer — while the customer remains in your store. Authorize.net Direct Post (Deprecated) can be used with orders created from the Admin as well as from the store.

**Deprecation Notice:** Authorize.Net has deprecated the Authorize.net Direct Post (Deprecated) payment method. If you use this method, you must update the **MD5 Hash key with a new Signature key**. The Authorize.Net payment method must be set up as the replacement payment method. Refer to [Authorize.Net](#) for more information.

### Customer Workflow

- 1 Customer chooses payment method.** During checkout, the customer chooses Authorize.net Direct Post (Deprecated) as the payment method.
- 2 Customer submits the order.** The customer enters the credit card information, reviews the order, and taps the Place Order button.
- 3 Authorize.Net completes the transaction.** Authorize.Net validates the card information, and processes the transaction.
  - If successful, the customer is redirected to the order confirmation page.
  - If the transaction fails, an error message appears, and the customer can try a different card, or choose a different payment method.

## Setting Up Authorize.net Direct Post (Deprecated)

### Step 1: Enable Authorize.net Direct Post (Deprecated)

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Authorize.Net Direct Post (Deprecated)** section. Then, do the following:
  - a. Set **Enabled** to “Yes.”
  - b. Set **Payment Action** to one of the following:

Authorize Only	Funds on the customer's card are authorized by Authorize.Net, and an order is created in your store's Admin. You can later create an invoice and capture the funds.
Authorize and Capture	Funds on the customer's card are authorized and captured by Authorize.Net, and an order and invoice are created in your store's Admin.

- c. Enter a **Title** to identify the Authorize.Net Direct Post (Deprecated) payment method during checkout.

*Enable Authorize.Net Direct Post (Deprecated)*

## Step 2: Enter Your Authorize.Net Account Credentials

- Enter the following credentials from your Authorize.Net merchant account:
  - API Login ID
  - Transaction Key
- In the **Merchant MD5** field, enter the hash value from your Authorize.Net merchant Account. The value is located on the Authorize.Net website at Account > Settings > Security Settings > MD5-Hash.
- Set **New Order Status** to one of the following:
  - Suspected Fraud
  - Processing
- To operate temporarily in a test environment, set **Test Mode** to “Yes.” When you are ready to process live transactions, set **Test Mode** to “No.”

When testing the configuration in a sandbox, use only the **credit card numbers** that are recommended by Authorize.Net.

- Enter the **Gateway URL** that establishes the connect to the Authorize.Net server. The default value is:

```
https://secure.authorize.net/gateway/transact.dll
```

If you have received a temporary URL for test transactions, don't forget to restore the original URL when you are ready to process live transactions.

### Step 3: Complete Payment and Notification Information

1. Verify that **Accepted Currency** is set to "US Dollar."
2. To save messages transmitted between your store and the Authorize.Net Direct Post system, set **Debug** to "Yes."
3. To set the notification options, do the following:
  - a. If you want Authorize.Net to send an order confirmation notification to the customer, set **Email Customer** to "Yes."
  - b. In the **Merchant's Email** field, enter the email address where you want to receive notification of orders placed with Direct Post. Leave blank if you do not want to receive notification.
4. To complete the payment options, do the following:
  - a. In the **Credit Card Types** list, select each credit card that is accepted in your store.
  - b. To require customers to enter a card verification value (CVV), set **Credit Card Verification** to "Yes."

The screenshot shows a configuration form with the following fields and values:

- Accepted Currency:** US Dollar (dropdown menu)
- Debug:** No (dropdown menu)
- Email Customer:** No (dropdown menu)
- Merchant's Email:** (empty text input field)
- Credit Card Types:** A list box containing American Express, Visa, MasterCard, Discover, and Other. American Express is currently selected.
- Credit Card Verification:** No (dropdown menu)

Each field has a "[WEBSITE]" link to its right.

*Complete the Payment Information*

- c. Set **Payment from Applicable Countries** to one of the following:

**All Allowed Countries** Customers from all **countries** specified in your store configuration can use this payment method.

**Specific Countries** After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.



- d. Enter the **Minimum Order Total** and **Maximum Order Total** for Direct Post transactions. To qualify, the order total must exactly match the minimum or maximum threshold, or fall somewhere in between.
- e. Enter a **Sort Order** number to determine the position of Direct Post in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

Minimum Order Total	<input type="text"/>	[WEBSITE]
Maximum Order Total	<input type="text"/>	[WEBSITE]
Sort Order	<input type="text"/>	[WEBSITE]

*Specify the Applicable Countries*

- 5. When complete, tap **Save Config.**

## Authorize.net

The Authorize.net payment method has replaced the Authorize.Net Direct Post (Deprecated) payment method. Authorize.Net handles all steps in the transaction process — such as payment data collection, data submission, and response to the customer — while the customer remains in your store. Authorize.Net can be used with orders created from the Admin as well as from the store.

Authorize.Net has deprecated the **Authorize.Net Direct Post (Deprecated)** payment method. To ensure payments continue to process correctly, configure Authorize.Net payment method for transactions.

### Customer Workflow

1

**Customer chooses payment method.** During checkout, the customer chooses Authorize.Net as the payment method.

2

**Customer submits the order.** The customer enters the credit card information, reviews the order, and taps the Place Order button.

3

**Authorize.Net completes the transaction.** Authorize.Net validates the card information, and processes the transaction.

- If successful, the customer is redirected to the order confirmation page.
- If the transaction fails, an error message appears, and the customer can try a different card, or choose a different payment method.

## Setting Up Authorize.Net

## Step 1: Complete Basic Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Authorize.net** section.
4. Enter a unique **Title** to identify the Authorize.Net payment method during checkout.
5. In the **Environment** field, select Sandbox or Production. This setting is based on your Authorize.Net merchant account type.
6. Set **Payment Action** to one of the following:

Authorize Only	Funds on the customer's card are authorized by Authorize.Net, and an order is created in your store's Admin. You can later create an invoice and capture the funds.
----------------	---

Authorize and Capture	Funds on the customer's card are authorized and captured by Authorize.Net, and an order and invoice are created in your store's Admin.
-----------------------	--

7. In the **API Login ID** field, enter the login ID from your Authorize.Net merchant account. Obtain the value in your Authorize.Net account at Account > Settings > Security Settings > API Credentials & Keys.
8. In the **Transaction Key** field, enter the key value from your Authorize.Net merchant account. Obtain the value in your Authorize.Net account at Account > Settings > Security Settings > API Credentials & Keys.

If you have previously generated a transaction key, you will enter the value. If you don't know your existing transaction key or have never established one, you can generate a new key in your Authorize.Net merchant account. If generating a new key to replace an existing key, it is important to update any existing applications that use the transaction key.

9. In the **Public Client Key** field, enter the key value from your Authorize.Net merchant account. Obtain the value in your Authorize.Net account at Account > Settings > Security Settings > Manage Public Client Key.
10. In the **Signature Key** field, enter the key value from your Authorize.Net merchant account. Obtain the value in your Authorize.Net account at Account > Settings > Security Settings > API Credentials & Keys.
11. Skip the **Merchant MD5 (deprecated)** field. Authorize.Net does not use this data field.

## Step 2: Enable Authorize.net

1. When all of the Basic Authorize.Net Settings are completed, set the **Enabled** field to “Yes.”

## Step 3: Complete Advanced Settings

1. To set the default status for all new orders, set **New Order Status** to one of the following:
  - Processing
  - Suspected Fraud
2. Verify that **Accepted Currency** is set to “US Dollar.”
3. To save messages transmitted between your store and Authorize.Net, set **Debug** to “Yes.”
4. If you want Authorize.Net to send an order confirmation notification to the customer, set **Email Customer** to “Yes.”

Merchant email settings can be configured in your Authorize.Net merchant account at **Account > User Profile > Edit Profile Information**.

5. To require customers to enter a card verification value (CVV), set **Enable Credit Card Verification Field** to "Yes." Default is "Yes."
6. In the **Credit Card Types** list, select each credit card that is accepted in your store.
7. Set **Payment from Applicable Countries** to one of the following:
 

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
8. Enter the **Minimum Order Total** and **Maximum Order Total** for store transactions. To qualify, the order total must exactly match the minimum or maximum threshold, or fall somewhere in between.
9. Enter a **Sort Order** number to determine the position that Authorize.Net will display in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
10. To save your configuration settings, tap **Save Config** before exiting.

For more information on the individual fields, refer to [Authorize.Net](#).



## CHAPTER 64:

# Basic Payment Methods

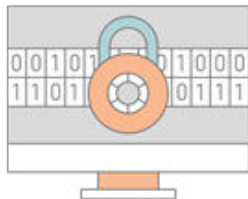
The payment methods covered in this section are built in to Magento, and do not require the services of a third-party payment processing company.



### Offline Payments

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Magento supports a number of offline payment methods, including payment by **check or money order**, and **cash on delivery (COD)**,



### Online Payments

---

**Bank transfer** is a basic payment method that is included with all Magento stores.

## Check / Money Order

Magento Open Source allows you to accept payments by check or money order. The Check / Money Order payment method is enabled for your store by default. You can accept checks and money orders from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

**Check / Money Order**

**Enabled** [website] Yes  Use system value

**Title** [store view] Check / Money order  Use system value

**New Order Status** [website] Pending  Use system value

**Payment from Applicable Countries** [website] All Allowed Countries  Use system value

**Payment from Specific Countries** [website]  
Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

**Make Check Payable to** [store view]

**Send Check to** [store view]

**Minimum Order Total** [website]

**Maximum Order Total** [website]

**Sort Order** [website]

*Check / Money Order*

### To configure payment by check or money order:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Check / Money Order** section. Then, do the following:
  - a. To accept payment by check or money order, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the Check / Money Order payment method during checkout.
  - c. Set **New Order Status** to “Pending” until receipt of payment is confirmed.
  - d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. In the **Make Check Payable To** field, enter the name of the party to whom the check must be payable.
  - f. In the **Send Check To** field, enter the street address or PO Box where the checks are mailed.
  - g. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts required to qualify for this payment method.

An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.
  - h. Enter a **Sort Order** number to determine the position of Check / Money Order in the list of payment methods that is shown during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

## Cash On Delivery

Magento Open Source allows you to accept COD payments for purchases. You can accept COD payment from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

The shipping carrier receives payment from the customer at the time of delivery, which is then transferred to you. You can make an adjustment for any fee charged by the carrier service in your shipping and handling charges.

The screenshot shows the configuration interface for 'Cash On Delivery Payment'. It features several sections:

- Enabled:** A dropdown menu set to 'No' with a 'Use system value' checkbox checked.
- Title:** A text input field containing 'Cash On Delivery' with a 'Use system value' checkbox checked.
- New Order Status:** A dropdown menu set to 'Pending' with a 'Use system value' checkbox checked.
- Payment from Applicable Countries:** A dropdown menu set to 'All Allowed Countries' with a 'Use system value' checkbox checked.
- Payment from Specific Countries:** A scrollable list of countries including Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda.
- Instructions:** A large empty text area for providing additional details.
- Minimum Order Total:** An empty text input field.
- Maximum Order Total:** An empty text input field.
- Sort Order:** An empty text input field.

*Cash On Delivery Payment*



### To set up cash on delivery payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, select **Payment Methods**.
3. Expand ☺ the **Cash On Delivery Payment** section. Then, do the following:
  - a. To activate Cash On Delivery Payment, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the COD payment method during checkout.
  - c. Set **New Order Status** to “Pending” until receipt of payment is confirmed.
  - d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. Enter the **Instructions** for accepting delivery of a COD order.
  - f. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts that are required to qualify for COD payment.

An order qualifies if the total is between, or matches, the minimum or maximum order total.
  - g. Enter a **Sort Order** number to determine the sequence in which Cash On Delivery is listed with other payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

## Bank Transfer

Magento Open Source allows you to accept payment that is transferred from a customer’s bank account and deposited into your merchant bank account.

**Bank Transfer Payment**

**Enabled** [website] No  Use system value

**Title** [store view] Bank Transfer Payment  Use system value

**New Order Status** [website] Pending  Use system value

**Payment from Applicable Countries** [website] All Allowed Countries  Use system value

**Payment from Specific Countries** [website]

- Afghanistan
- Åland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda

**Instructions** [store view]

**Minimum Order Total** [website]

**Maximum Order Total** [website]

**Sort Order** [website]

*Bank Transfer Payment*

### To configure bank transfer payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Bank Transfer Payment** section. Then, do the following:
  - a. To activate bank transfers, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the Bank Transfer Payment method during checkout.
  - c. Set **New Order Status** to “Pending” until payment is authorized.
  - d. Set **Payment from Applicable Countries** to one of the following:
 

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. Enter the **Instructions** your customers must follow to set up a bank transfer. Depending on the country where your bank is located and the requirements of the bank, you might need to include the following information:
    - Bank account name
    - Bank account number
    - Bank routing code
    - Bank name
    - Bank address
  - f. Set **Minimum Order Total** and **Maximum Order Total** to the amounts required to qualify to use this payment method.
 

An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.
4. Enter a **Sort Order** number to determine the position of Bank Transfer in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
5. When complete, tap **Save Config**.

## Purchase Order

A purchase order (PO) allows commercial customers to pay for authorized purchases by referencing the PO number. The purchase order is authorized and issued in advance by the company that is making the purchase. During checkout, the customer chooses Purchase Order as the method of payment. Upon receipt of your invoice, the company processes the payment in their accounts payable system, and pays for the purchase.

Before accepting payment by purchase order, always establish the credit worthiness of the commercial customer.

**Purchase Order**

**Enabled** [website] No  Use system value

**Title** [store view] Purchase Order  Use system value

**New Order Status** [website] Pending  Use system value

**Payment from Applicable Countries** [website] All Allowed Countries  Use system value

**Payment from Specific Countries** [website]

- Afghanistan
- Aland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda

**Minimum Order Total** [website]

**Maximum Order Total** [website]

**Sort Order** [website]

*Purchase Order*

### To configure payment by purchase order:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Purchase Order** section. Then, do the following:
  - a. To activate this payment method, set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify this payment method during checkout.
  - c. Set **New Order Status** to “Pending” until payment is authorized.
  - d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - e. Set **Minimum Order Total** and **Maximum Order Total** to the amounts required to qualify for this payment method.

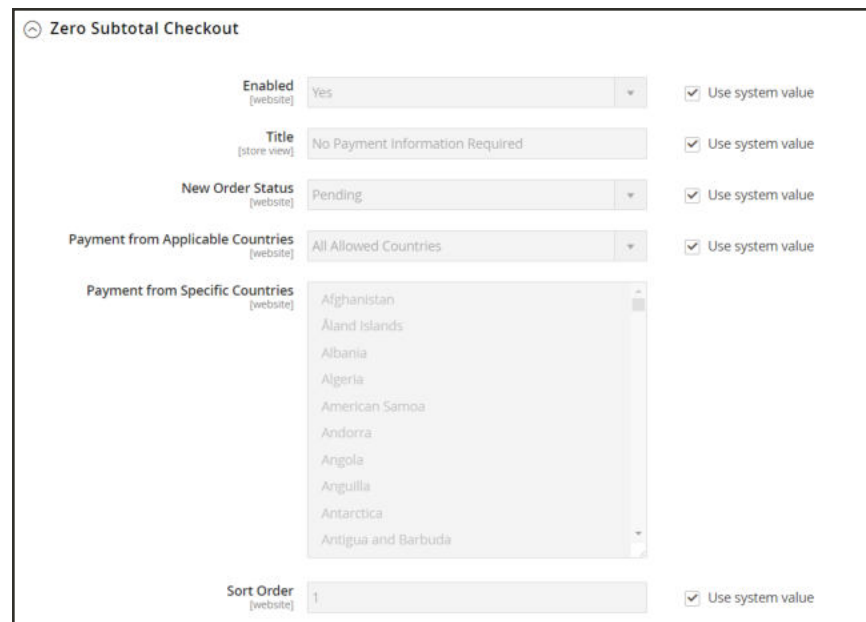
An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.
  - f. Enter a **Sort Order** number to determine the position of Purchase Order in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

## Zero Subtotal Checkout

Zero Subtotal Checkout can be used for orders with a subtotal of zero that are taxed after a discount is applied. For example, Zero Subtotal Checkout might be used in the following situations:

- A discount covers the entire price of the purchase, with no additional charge for shipping.
- The customer adds a **downloadable** or **virtual** product to the shopping cart, and the price equals zero.
- The price of a **simple** product is zero, and the **Free Shipping** method is available.
- A **coupon code** covers the full price of products and shipping.

To save time, zero subtotal orders can be set to invoice automatically.



The screenshot shows the configuration page for the Zero Subtotal Checkout payment method. The page is titled "Zero Subtotal Checkout" and contains several settings:

- Enabled** (website): Yes (dropdown menu)  Use system value
- Title** (store view): No Payment Information Required  Use system value
- New Order Status** (website): Pending (dropdown menu)  Use system value
- Payment from Applicable Countries** (website): All Allowed Countries (dropdown menu)  Use system value
- Payment from Specific Countries** (website): A list of countries including Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda.
- Sort Order** (website): 1  Use system value

*Zero Subtotal Checkout*

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, select **Payment Methods**.
3. Click to expand the **Zero Subtotal Checkout** section. Then, do the following:
  - a. Enter a **Title** to identify the Zero Subtotal method during checkout.
  - b. Set **Enabled** to “Yes” to activate Zero Subtotal Checkout.
  - c. If orders typically wait for authorization, set **New Order Status** to “Pending” until payment is authorized.
 

Pending	The order is waiting for authorization.
Processing	Payment has been authorized, and the transaction is being processed.
  - d. Set **Automatically Invoice All Items** to “Yes” if you want to automatically invoice all items that have a zero balance.
  - e. Set **Payment from Applicable Countries** to one of the following:
 

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.
  - f. Enter a **Sort Order** number to determine the position of Zero Subtotal Checkout in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.







## CHAPTER 65:

# Fraud Protection

Fraud protection services and filters examine submitted orders before the transaction is processed to detect fraudulent orders and protect you from the expense of chargebacks. Magento supports the following fraud protection solutions:

- [PayPal Fraud Management Filter](#)
- [Fraud Protection Solutions on Magento Marketplace](#)

## Signifyd Guaranteed Fraud Protection

Signifyd Guaranteed Fraud Protection automates your order review process so you can accept more orders and maximize revenue without chargeback losses. Signifyd automatically reviews orders for fraud, and indicates which orders to ship, and which to reject. The results of the Signifyd Guarantee Decision appear as a column in the [Orders](#) grid.


Signifyd's Guaranteed Fraud Protection protects every approved order with a financial guarantee against fraudulent chargebacks, so you can grow your business without fear of fraud.

Feature branch test.

### Step 1: Sign Up for a Signifyd Account

1. Complete Signifyd's [Guaranteed Fraud Protection](#) form to contact their Sales team.
2. Follow their one-click installation instructions to install Signifyd on your server.
3. Complete the Signifyd configuration for your Magento installation.

### Step 2: Configure your Magento store:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Fraud Protection**.
3. Under **Signifyd**, expand  the **Configuration** section. Then, do the following:

The screenshot shows the 'Configuration' page for Signifyd. It includes a link to a setup guide and support contact information. The configuration fields are as follows:

Field Name	Value	Notes
Enable this Solution [website]	No	
API Key [website]		Your API key can be found on the settings page in the Signifyd console.
API URL [website]	https://api.signifyd.com/v2/	Don't change unless asked to do so.
Debug [website]	No	
Webhook URL [website]	https://docsdemo.corp.magento.com/eedevelop/signifyd/webhooks/handler	Your webhook URL will be used to configure a guarantee completed webhook in Signifyd. Webhooks are used to sync Signifyd's guarantee decisions back to Magento.

### Signifyd Configuration

- a. Set **Enable this Solution** to “Yes”.
  - b. From the **Settings** page of your Signifyd console, enter the **API Key** .
  - c. Do not change the default **API URL**, unless instructed to do so.
  - d. If you want Magento to keep a log of all interactions between your store and **Signifyd**, set **Debug** to “Yes”.
  - e. The **Webhook URL** is the location of the handler that synchronizes Signifyd’s guarantee decisions with your store, and cannot be changed from the Admin.
4. When complete, tap **Save Config**.

# Shipping

## Contents

Studies show that stores offering customers a choice of several shipping methods have higher conversion rates than those that use a single method for all shipments. In this section of the guide, you will learn how to set up a variety of shipping methods and carriers, and print shipping labels.

### Shipping Settings

#### Shipping Policy

### Basic Shipping Methods

#### Free Shipping

#### Flat Rate

#### Table Rate

#### Dimensional Weight

### Carriers

### Shipping Labels

#### Shipping Label Workflow

#### Configuring Shipping Labels

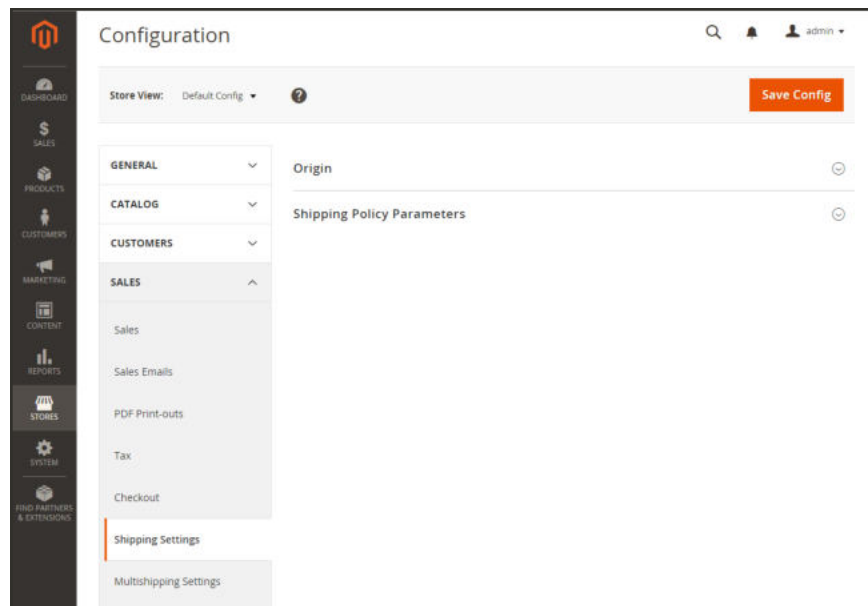
#### Creating Shipping Labels

## CHAPTER 66:

# Shipping Settings

The shipping configuration establishes the point of origin for all shipments, your shipping policy, and the handling of shipments to multiple addresses.

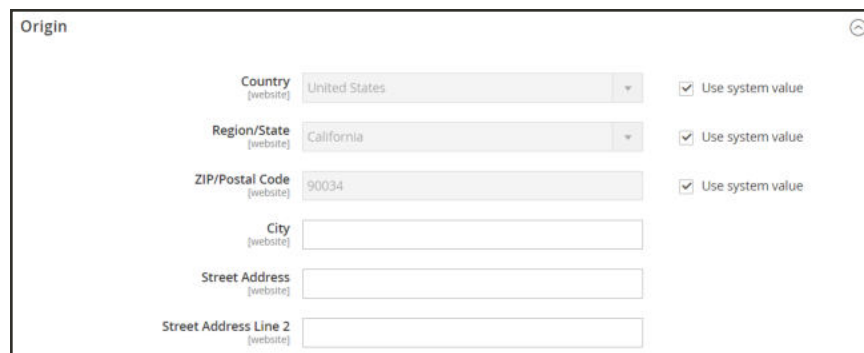
- [Point of Origin](#)
- [Shipping to Multiple Addresses](#)
- [Shipping Policy](#)



*Shipping Settings*

## Point of Origin

The point of origin is used to calculate the charge for shipments made from your store or warehouse, and also determines the tax rate for products sold. When calculating **EU taxes**, make sure that the **Default Tax Destination Calculation** for each store view corresponds to the Shipping Settings point of origin.



The screenshot shows the 'Origin' configuration panel. It contains the following fields and options:

- Country** [website]: United States (dropdown),  Use system value
- Region/State** [website]: California (dropdown),  Use system value
- ZIP/Postal Code** [website]: 90034,  Use system value
- City** [website]: (empty text field)
- Street Address** [website]: (empty text field)
- Street Address Line 2** [website]: (empty text field)

### Origin

#### To establish the point of origin:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand ☺ the **Origin** section, and complete the following:
  - Country
  - Region / State
  - ZIP / Postal Code
  - City
  - Street Address (and line 2, if needed)
4. When complete, tap **Save Config**.

## Multiple Addresses

The Multiaddress Shipping options enable customers to ship an order to multiple addresses during checkout, and determine the maximum number of addresses to which an order can be shipped.

### To configure multiple address shipping:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Multishipping Settings**.
3. Expand ☺ the **Options** section. Then, do the following:
  - a. Set **Allow Shipping to Multiple Addresses** to “Yes.”
  - b. Enter the **Maximum Qty Allowed for Shipping to Multiple Addresses**.
4. When complete, tap **Save Config**.



The screenshot shows a configuration panel titled "Options" with a collapse icon in the top right corner. It contains two settings:

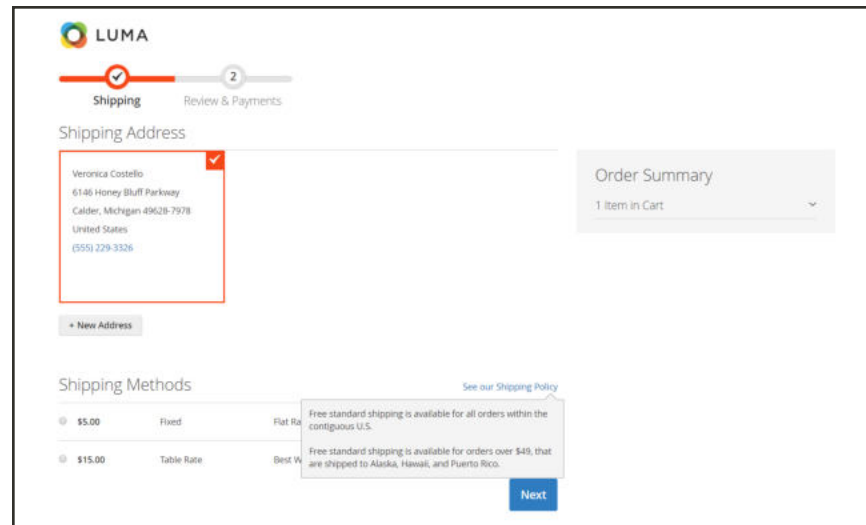
- Allow Shipping to Multiple Addresses** (website): A dropdown menu is set to "Yes". To its right is a checkbox labeled "Use system value" which is checked.
- Maximum Qty Allowed for Shipping to Multiple Addresses** (website): A text input field contains the number "100". To its right is a checkbox labeled "Use system value" which is checked.

*Multiaddress Shipping Options*

## Shipping Policy

A shipping policy should explain your company's business rules and guidelines for shipments. For example, if you have price rules that trigger free shipping, you can explain the terms in your shipping policy.

To display your shipping policy during checkout, complete the Shipping Policy Parameters in the configuration. The text appears when customers click the “See our shipping policy” link during checkout.



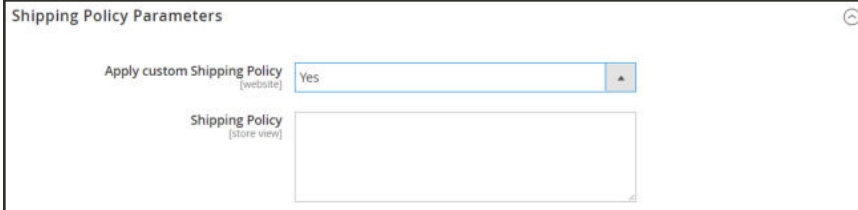
*Shipping Policy During Checkout*



**To configure your shipping policy:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand ☺ the **Shipping Policy Parameters** section, and do the following:
  - a. Set Apply **Custom Shipping Policy** to “Yes.”
  - b. Either paste or enter your **Shipping Policy** into the text box.

If you use a word processor to compose the text, make sure to save the document as a .txt file to remove any control characters from the text. Then, copy and paste the text into the Shipping Policy text box.



The screenshot shows the 'Shipping Policy Parameters' configuration window. It contains two main settings: 'Apply custom Shipping Policy' with a dropdown menu currently showing 'Yes', and 'Shipping Policy' with an empty text area for input. The text area is labeled '[store view]'.

*Shipping Policy Parameters*

4. When complete, tap **Save Config**.





## CHAPTER 67:

# Basic Shipping Methods

Magento Open Source supports a wide range of shipping methods and carriers. In this chapter you will learn how to set up that shipping methods that do not require an account with a third-party provider.

- [Free Shipping](#)
- [Flat Rate](#)
- [Table Rates](#)
- [Dimensional Weight](#)

## Free Shipping

Free shipping is one of the most effective promotions you can offer. It can be based on a minimum purchase, or set up as a **cart price rule** that is applied when a set of conditions is met. If both apply to the same order, the configuration setting takes precedence over the cart rule.

Check your shipping carrier configuration for any additional settings that may be required for free shipping.

The screenshot shows the 'Free Shipping' configuration panel. It includes the following settings:

- Enabled** (website): No (dropdown), with a checked 'Use system value' checkbox.
- Title** (store view): Free Shipping (text input), with a checked 'Use system value' checkbox.
- Method Name** (store view): Free (text input), with a checked 'Use system value' checkbox.
- Minimum Order Amount** (website): (empty text input).
- Displayed Error Message** (store view): This shipping method is not available. To use this shipping method, please contact us. (text area), with a checked 'Use system value' checkbox.
- Ship to Applicable Countries** (website): All Allowed Countries (dropdown), with a checked 'Use system value' checkbox.
- Ship to Specific Countries** (website): A list of countries including Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda.
- Show Method if Not Applicable** (website): No (dropdown).
- Sort Order** (website): (empty text input).

### *Free Shipping*

#### Step 1: Configure Free Shipping

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Methods**.
3. Expand ☺ the **Free Shipping** section. Then, do the following:
  - a. Set **Enabled** to “Yes.”
  - b. Enter a **Title** to identify the Free Shipping method during checkout.

- c. Enter a **Method Name** to describe this shipping method.
- d. Enter the **Minimum Order Amount** to qualify for free shipping.

To use Free Shipping with **Table Rates**, make the Minimum Order Amount so high that it is never met. This prevents Free Shipping from going into effect, unless it is triggered by a price rule.

- e. In the **Displayed Error Message** box, type the message to appear if free shipping becomes unavailable.
- f. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use free shipping.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where free shipping can be used.

- g. Set **Show Method if Not Applicable** to one of the following:

Yes	Always shows the Free Shipping method, even when not applicable.
No	Shows the Free Shipping method only when applicable.

- h. Enter a **Sort Order** number to determine the position of free shipping in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

4. When complete, tap **Save Config**.

## Step 2: Enable Free Shipping in the Carrier Configuration

Make sure to complete any configuration that is required for each carrier that you plan to use for free shipping. For example, if your UPS configuration is otherwise complete, make the following settings to enable and configure free shipping:

1. From the Shipping Methods configuration, click to expand the **UPS** section.
2. Expand ☺ the **UPS** section. Then, set **Free Method** to “Ground.”
3. To require a minimum order for free shipping, set **Free Shipping with Minimum Order Amount** to “Enable.”
4. Enter the required amount in the **Minimum Order Amount for Free Shipping** field.
5. When complete, tap **Save Config**.

## Flat Rate

Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple shipping solution, especially when used with the flat-rate packaging that is available from some carriers. When enabled, Flat Rate appears as an option during checkout. Because no specific carrier is specified, you can use a carrier of your choice.

The screenshot shows the configuration panel for the Flat Rate shipping method. It includes the following fields and options:

- Enabled** (website): Yes (dropdown),  Use system value
- Title** (store view): Flat Rate,  Use system value
- Method Name** (store view): Fixed,  Use system value
- Type** (website): Per Item (dropdown),  Use system value
- Price** (website): 5.00,  Use system value
- Calculate Handling Fee** (website): Fixed (dropdown),  Use system value
- Handling Fee** (website): [Empty text field]
- Displayed Error Message** (store view): This shipping method is not available. To use this shipping method, please contact us.  Use system value
- Ship to Applicable Countries** (website): All Allowed Countries (dropdown),  Use system value
- Ship to Specific Countries** (website): [List of countries including Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda]
- Show Method if Not Applicable** (website): No (dropdown)
- Sort Order** (website): [Empty text field]

### *Flat Rate*

#### To set up flat rate shipping:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Methods**.
3. Expand ☺ the **Flat Rate** section. Then, do the following:

- a. Set **Enabled** to “Yes.”

Flat Rate appears as an option in the Estimate Shipping and Tax section of the shopping cart, and also in the Shipping section during checkout.

- b. Enter a descriptive **Title** for the Flat Rate method.
- c. Enter a **Method Name** to appear next to the calculated rate in the shopping cart. The default method name is “Fixed.” If you charge a handling fee, you can change the Method Name to “Plus Handling,” or something else that is suitable.
- d. To describe how flat rate shipping can be used, set **Type** to one of the following:

None	Disables the payment type. The Flat Rate option is listed in the cart, but with a rate of zero—which is the same as free shipping.
Per Order	Charges a single flat rate for the entire order.
Per Item	Charges a single flat rate for each item. The rate is multiplied by the number of items in the cart, regardless of whether there are multiple quantities of the same, or of different items.

- e. Enter the **Price** that you want to charge for flat rate shipping.
- f. If charging an additional handling fee, set **Calculate Handling Fee** to one of the following:
- Fixed
  - Percent

Then, enter the **Handling Fee** rate according to the method used to calculate the fee. For example, if the fee is calculating based on a percentage, enter 0.06 for 6 percent. If using a fixed amount calculation, enter the fee as a decimal.

- g. In the **Displayed Error Message** box, type the message that appears if Flat Rate Shipping becomes unavailable.
- h. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use flat rate shipping.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where flat rate shipping can be used.

- i. Enter a **Sort Order** number to determine the position of the Flat Rate in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

4. When complete, tap **Save Config**.

## Table Rates

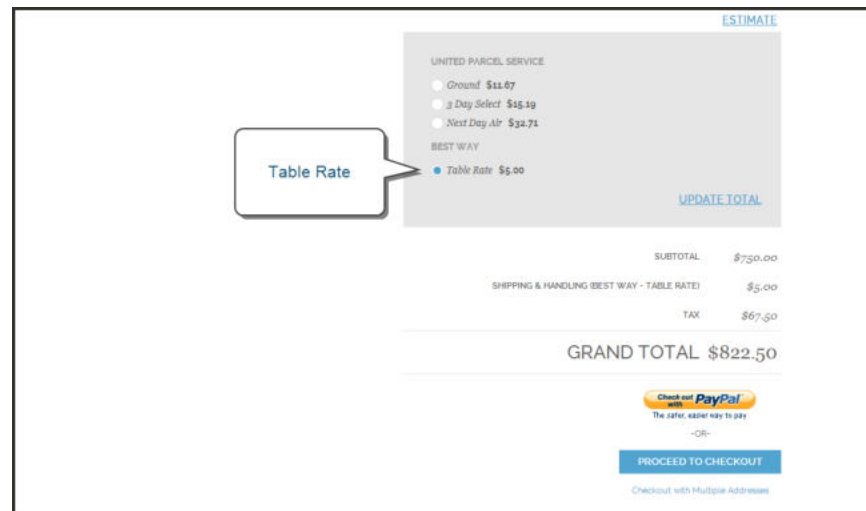
The table rate shipping method references a table of data to calculate shipping rates based on a combination of conditions, including:

- Weight v. Destination
- Price v. Destination
- # of Items v. Destination

For example, if your warehouse is in Los Angeles, it costs less to ship to San Diego than to Vermont. You can use table rate shipping to pass the savings on to your customers.

The data that is used to calculate tables rates is prepared in a spreadsheet and imported into your store. When the customer requests a quote, the results appear in the shipping estimate section of the shopping cart.

Only one set of table rate data can be active at a time.



*Table Rate in Shopping Cart*



**Process Overview:**

- Step 1: [Complete the Default Settings](#)
- Step 2: [Prepare the Table Rate Data](#)
- Step 3: [Import the Table Rate Data](#)
- Step 4: [Verify the Rates](#)

**Step 1: Complete the Default Settings**

The first step is to complete the default settings for table rates. You can complete this step without changing the scope of the configuration.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand ☺ the **Table Rates** section. Then, do the following:
  - a. Set **Enabled** to “Yes.”
 

If necessary, clear the **Use system value** checkbox to edit for any field to be edited.
  - b. Enter the **Title** that you want to appear for table rates section during checkout. (The default title is “Best Way.”)
  - c. Enter the **Method Name** that you want to appear as a label next to the calculated rate in the shopping cart.
  - d. Set **Condition** to one of the following calculation methods:
    - Weight v. Destination
    - Price v. Destination
    - # of Items v. Destination
  - e. For orders that include virtual products, set **Include Virtual Products in Price Calculation** to “Yes” if you want to be able to include the virtual product(s) in the calculation.

Because virtual products—such as services—have no weight, they cannot change the result of a calculation that is based on the Weight v. Destination condition. However, virtual products can change the result of a calculation that is based on either the Price v. Destination or # of Items vs Destination condition.

- f. If charging a handling fee, set **Calculate Handling Fee** to one of the following:
  - Fixed
  - Percent

Then, enter the **Handling Fee** rate according to the method used to calculate the fee.

If the handling fee is based on a percent, enter the whole number without the percent sign.

- g.** In the **Displayed Error Message** box, type the message that appears when this method is not available.
  - h.** Set **Ship to Applicable Countries** to one of the following:
    - All Allowed Countries      Customers from any **country** specified in your store configuration can use table rate shipping.
    - Specific Countries      After choosing this option, the “Ship to Specific Countries” list appears. Select each country where customers can use table rate shipping.
  - i.** Enter a **Sort Order** number to determine where table rates appear in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
- 4.** When complete, tap **Save Config**.

The screenshot shows the 'Table Rates' configuration screen. It contains the following fields and options:

- Enabled:** Set to 'Yes'.  Use system value
- Title:** Set to 'Best Way'.  Use system value
- Method Name:** Set to 'Table Rate'.  Use system value
- Condition:** Set to 'Price vs. Destination'.  Use system value
- Include Virtual Products in Price Calculation:** Set to 'Yes'.  Use system value
- Calculate Handling Fee:** Set to 'Fixed'.  Use system value
- Handling Fee:** An empty text input field.
- Displayed Error Message:** Contains the text 'This shipping method is not available. To use this shipping method, please contact us.'  Use system value
- Ship to Applicable Countries:** Set to 'All Allowed Countries'.  Use system value
- Ship to Specific Countries:** A scrollable list of countries including Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda.
- Show Method if Not Applicable:** Set to 'No'.
- Sort Order:** An empty text input field.

*Table Rates*

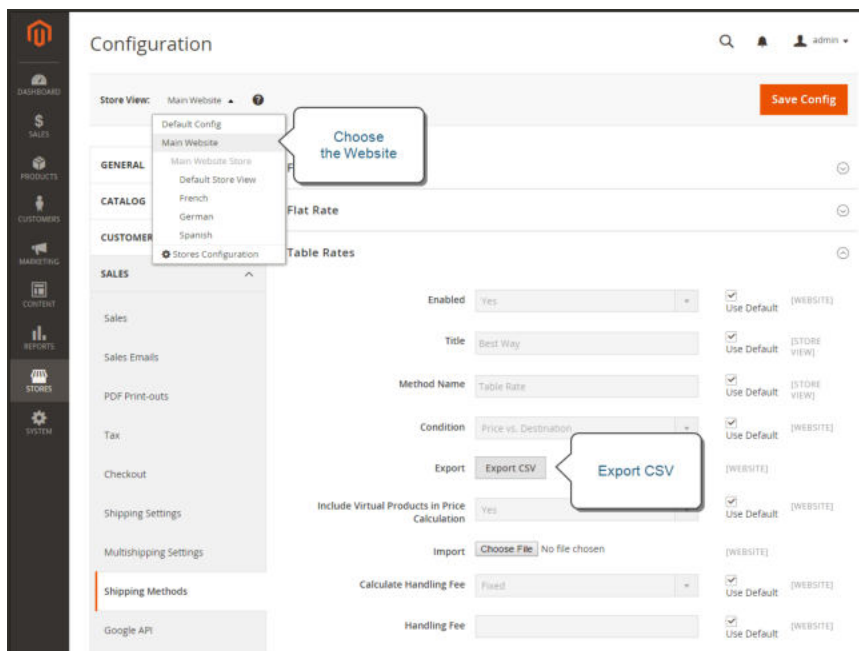
## Step 2: Prepare the Table Rate Data

1. In the upper-left corner, set **Store View** to “Main Website,” or to any other website where the configuration applies. When prompted to confirm, tap **OK**.

The Export and Import options now appear in the Table Rates section, with “Use Default” checkboxes to the right of each option.

To change any of the current settings, you must first clear the “Use Default” checkbox next to the field.

2. To change the **Condition**, clear the **Use Default** checkbox. Then, choose another option.
3. Tap **Export CSV**. Then, save the **tablerates.csv** file to your computer.



*Export CS*

4. Open the file in a spreadsheet. Then, complete the table with appropriate values for the shipping calculation condition.
  - Use an asterisk (\*) as a wildcard to represent all possible values in any category.
  - The Country column must contain a **valid three-character code** for each row.
  - Sort the data by Region/State so the specific locations are at the top of the list, and the wildcard locations at the bottom. This will process the rules with the absolute values first, and the wildcard values later.

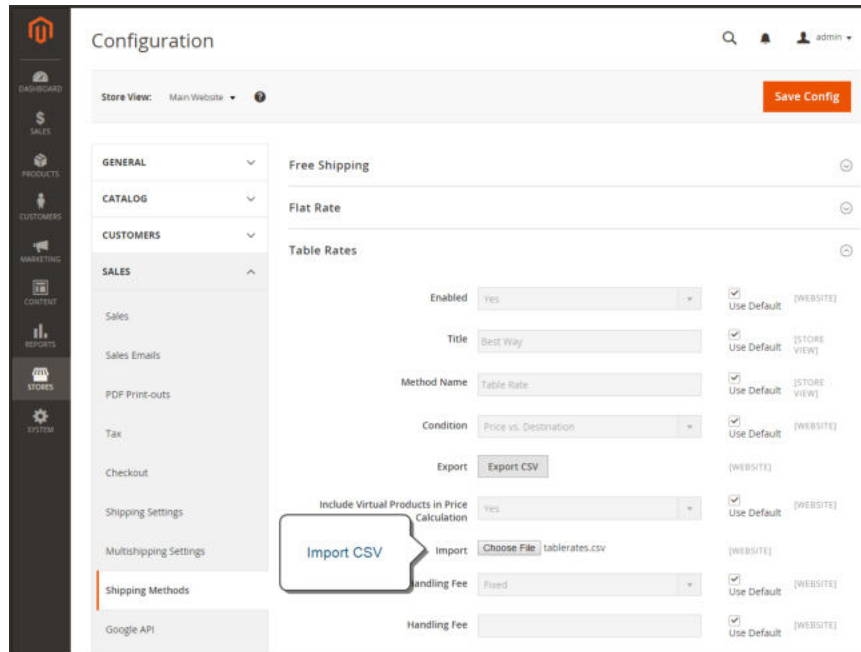
	A	B	C	D	E	F
1	Country	Region/State	Zip/Postal Code	Weight (and above)	Shipping Price	
2	AUS	NT	*	9	39.95	
3	AUS	NT	*	0	19.95	
4	AUS	VIC	*	9	19.95	
5	AUS	VIC	*	0	5.95	
6	AUS	WA	*	9	39.95	
7	AUS	WA	*	0	19.95	
8	AUS	*	*	9	29.95	
9	AUS	*	*	0	9.95	
10						

*Weight vs. Destination (Australia)*

- When complete, save the **tablerates.csv** file.

### Step 3: Import the Table Rate Data

- Return to the **Table Rates** section of your store configuration.
- In the upper-left corner, set **Store View** to the website where this method will be used.
- Next to the **Import** field, tap **Choose File**. Select your completed **tablerates.csv** file, and import the rates.



*Import Table Rates*

- When complete, tap **Save Config**.

### Step 4: Verify the Rates

To make sure that the table rate data is correct, go through the payment process with several different addresses to make sure the shipping and handling rates are calculated correctly.

#### Example 1: Price v. Destination

This example uses the Price v. Destination condition to create a set of three different shipping rates based on the amount of the order subtotal for the continental United States, Alaska, and Hawaii. The asterisk (\*) is a wildcard that represents all values.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	ORDER SUBTOTAL (and above)	SHIPPING PRICE
USA	HI	*	100	10
USA	HI	*	50	15
USA	HI	*	0	20
USA	AK	*	100	10
USA	AK	*	50	15
USA	AK	*	0	20
USA	*	*	100	5
USA	*	*	50	10
USA	*	*	0	15

### Example 2: Weight v. Destination

This example uses the Weight v. Destination condition to create different shipping rates based on the weight of the order.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	WEIGHT (AND ABOVE)	SHIPPING PRICE
AUS	NT	*	9	39.95
AUS	NT	*	0	19.95
AUS	VIC	*	9	19.95
AUS	VIC	*	0	5.95
AUS	WA	*	9	39.95
AUS	WA	*	0	19.95
AUS	*	*	9	29.95
AUS	*	*	0	9.95

### Example 3: Restrict Free Shipping to the Continental United States

1. Create a `tablerates.csv` file that includes all the state destinations to which you are willing to provide free shipping.
2. Complete the table rate configuration with the following settings:

SETTING	VALUE
Condition	Price v. Destination
Method Name	Free Shipping
Ship to Applicable Countries	Specific Countries
Ship to Specific Countries	Select only United States
Show method if not applicable	No

3. Set **Store View** to the main website. Then, tap **Import** to import the `tablerates.csv` file.

## Dimensional Weight

Dimensional weight, sometimes called volumetric weight, is a common industry practice that bases the transportation price on a combination of weight and package volume. In simple terms, dimensional weight determines the shipping rate based on the amount of space a package occupies in the cargo area of the carrier. Dimensional weight is typically used when a package is relatively light compared to its volume.

All major carriers apply dimensional weight to some shipments. However, the manner in which dimensional weight pricing is applied varies from one carrier to another.

We recommend that you use [Magento Shipping](#) to calculate dimensional weight for all carriers. If your company has a high volume of shipments, even a slight difference in shipping price can translate to thousands of dollars over the course of a year.







## CHAPTER 68:

# Magento Shipping

Magento Shipping is a multi-carrier shipping and fulfillment solution that combines intelligent automation capabilities, access to global carrier networks, and seamless integration with the Magento Admin. Our technology partner, Temando, provides the engine that powers this technology to deliver the following benefits:

- Provides accelerated revenue growth, and boost business efficiency.
- Manages multiple carriers from a single, integrated portal.
- Automatically checks for conflicts with extensions during setup to help avoid issues during development and testing.
- Simplifies ongoing maintenance by automatically including new carriers and features without having to update.

## Changes In the Latest Release

### Release 2.3.1

#### New Features

- **Shipment Cancellation**
- Portal Access from Magento

#### Improvements

- **Shipment Workflow**
- **Batch Processing**
- **Collection Points**
- **Click & Collect**
- **Carrier-Specific Packaging**
- **Qualify Experience**

## Supported Countries

COUNTRY	CARRIER SUPPORT
Australia	FedEx pre-negotiated rates, and ad-hoc returns for FedEx, USPS, Australia Post, UK Mail, and DHL Express.
Austria	DHL Express
Brazil	DHL Express
Canada	DHL Express
Denmark	DHL Express
France	DHL Express
Germany	DHL Express
Italy	DHL Express
Japan	DHL Express
Netherlands	DHL Express
Norway	DHL Express
Russia	DHL Express
Spain	DHL Express
Sweden	DHL Express
Switzerland	DHL Express
United Kingdom	FedEx pre-negotiated rates, and ad-hoc returns for FedEx, USPS, Australia Post, UK Mail, and DHL Express.
United States	FedEx pre-negotiated rates, and ad-hoc returns for FedEx, USPS, Australia Post, UK Mail, and DHL Express.

## Quick Look



### Advanced Shipments

---

Magento Shipping is now available in **seventeen countries**, where you can create shipments with advanced features such as route and package information with dimensional weight, carrier quotes, international details with required export information, harmonization codes, shipping documents and labels, delivery instructions, and tracking information.



### Locations

---

Configure multiple warehouses, distribution centers, retail stores, dropshippers, and third-party logistics. Allocate shipments to any supported fulfillment location.



### Click & Collect

---

Offer the convenience of ordering online, with convenient customer pickup at a nearby location.



### Collection Points

---

Collection points allow customers to order online and have it shipped to a designated collection point, rather than to their address.



## Dispatches

---

Book shipments with all carriers, and maintain a manifest of scheduled pickup with selected carriers.



## Batches

---

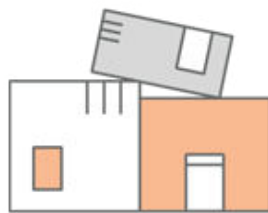
Orders that are ready to ship with Magento Shipping can be booked together as multiple shipments, and processed as a **batch**.



## Shipping Partners

---

Receive real-time rates from global carriers, and configure multiple accounts with the same carrier across multiple locations. Access prenegotiated rates for selected carriers, or create your own negotiated rates in selected markets.



## Packaging

---

Manage package names and dimensions, and access carrier supplied packaging information.



## Shipping Experience Rules

---

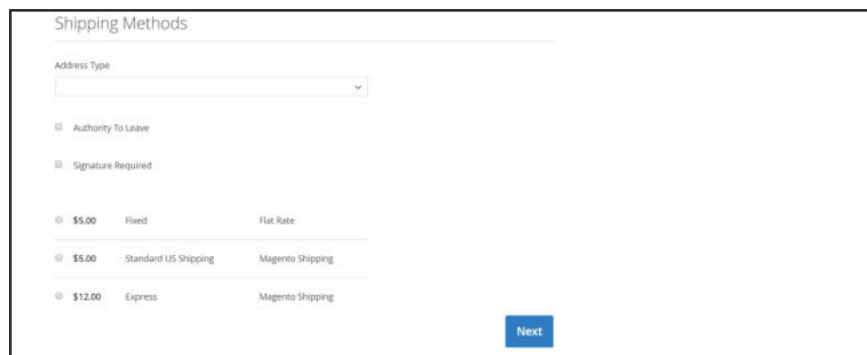
Automate the shipping and fulfillment processes based on a variety of factors, including inventory levels, proximity to destination, product type, shipping costs, ETA, carrier, packaging, and more.

## Customer Experience

From the storefront, Magento Shipping options appear during the first step of the checkout process. Magento Shipping can be **configured** to show all options, or only the ones that apply to the order.

### Shipping Methods

During checkout, the shopper identifies the address type as a residence or business, and specifies whether the carrier must obtain a signature, or can leave the package at the door. Finally, the shopper chooses the preferred shipping rate and carrier to be used for the order.



The screenshot shows the 'Shipping Methods' section of a checkout page. At the top, there is a title 'Shipping Methods' and a horizontal line. Below this is a dropdown menu labeled 'Address Type'. Underneath are two checkboxes: 'Authority To Leave' and 'Signature Required'. The main area contains three shipping options, each with a radio button, a rate, a shipping method name, and a carrier name:

Rate	Shipping Method	Carrier
\$5.00	Fixed	Flat Rate
\$5.00	Standard US Shipping	Magento Shipping
\$12.00	Express	Magento Shipping

A blue 'Next' button is located at the bottom right of the form.

*Shipping Rate and Carrier*

### Click & Collect

If Click & Collect is enabled in the configuration, specific locations can be designated as Click & Collect fulfillment centers where the order can be sent for customer pick up.

During checkout, the “Pick up in store” option appears under Shipping Methods. When selected, a list of possible pickup locations appears, according to the logic of the related **shipping experience rule**. The customer chooses the most convenient location, and selects Click & Collect as the shipping method.

During Order Review, the Click & Collect location appears in the Ship To section, rather than the customer’s shipping address.

The customer is notified by email when the order is ready to collect at the designated location.



Shipping Methods

**Delivery Options**

- Send To Address
- Send To Collection Point

**Collection Point Selection**

Country  Postal Code

Enter country and postal code to search for a collection point.

*Collection Point Selection*

## Collection Points

Collection points allow the customer to specify where the order is shipped. If enabled in the configuration, specific locations can be designated as fulfillment centers where the order is sent. The list of available countries is determined by those specified for collection points in the Magento Shipping configuration.

During checkout, the “Send to Collection Point” option appears under Shipping Methods. When selected, a list of possible pickup locations appears that are within a 20 km radius of the customer location, according to the logic of the related [shipping experience rule](#). The list is sorted by the shortest distance, followed by description and opening hours, if available. Any locations with distances that cannot be calculated are listed alphabetically.

After choosing the location, the customer is prompted to choose the collection point as the shipping method.

During Order Review, the collection point location appears in the Ship To section, rather than the customer’s shipping address.

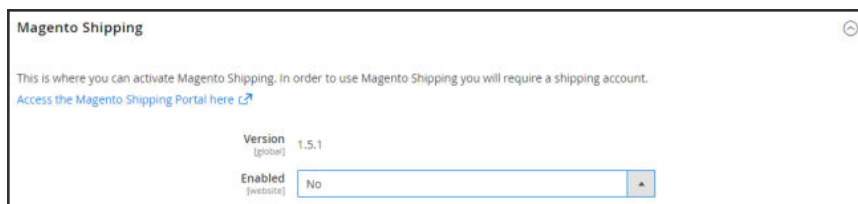
## Setting Up Magento Shipping

When enabled, Magento Shipping adds **Dispatch** and **Batches** options to the Magento Sales menu, a Shipping section to the **Stores** menu, and new sections of detailed information in each **shipment**. In the storefront, the selection of available Magento Shipping options appears during checkout.

### Step 1: Sign Up for Magento Shipping

To access the Magento Shipping Portal, you must have both a **Magento account** and a Magento Shipping account. Your access to the Magento Shipping portal is based on your Magento account ID.

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand the **Magento Shipping** section. Then, click **Access the Magento Shipping Portal here**.



*Access Magento Shipping Portal*

4. When prompted, enter the **Email** and **Password** that you use to log in to your Magento account.
5. Follow the onscreen instructions to request a shipping account. When you receive email confirmation, follow the instructions to complete the process.

### Step 2: Generate Your API Tokens

1. When you receive the confirmation email, open a tab to a separate browser window, and log in to your **Magento Shipping** account.

You should now have an open tab to your Magento configuration, and another to your Magento Shipping account. Information from your Magento Shipping account will later be pasted into the Magento Shipping configuration in the Admin.

2. Take a moment to read the **Getting Started** steps.
3. In the header, click the **question mark (?)** to hide the Welcome message and Getting Started steps.

4. The **Account Details** section shows your **API Endpoint** and **Account ID**. This information will later be copied and pasted into your Magento configuration.



*Account Details*

5. A unique **API token** is used to identify the connection between your Magento website and your Magento Shipping account.

In the API Tokens section, tap **Generate Token** for the type of token that you need.

**Production API Token** Generates the API token that is needed to use Magento Shipping in production mode.

**Test API Token** Generates an API token that is needed to use Magento Shipping in test mode.

For a first-time setup, choose **Test API Token**. When you are ready to “go live” with Magento Shipping, you can use the Production API Token. In the next step you will paste the token into the Magento configuration.



*API Tokens*

### Step 3: Activate Magento Shipping

Return to the browser tab with the **Magento Shipping** configuration, and do the following:

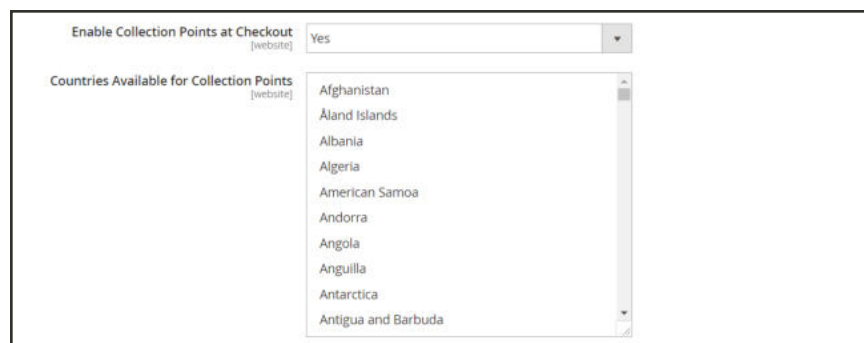
1. Set **Enabled** to “Yes.”
2. Enter the **Title** that you want to use for Magento Shipping.
3. By default, only API errors are logged. If you prefer to log all API communication, set **Enable API Logging** to “Yes.”



4. Paste the following credentials from your Magento Shipping account. You will need to return to the browser tab that is open to Magento Shipping, and copy and paste each into the Magento configuration.
  - API Endpoint
  - Account ID
  - API Token

To run Magento Shipping in a testing environment, make sure to generate and copy the test token, rather than the production token.

5. To give customers the option to have the shipment delivered to a designated drop point other than the standard “ship to” address, set **Enable Collection Points at Checkout** to “Yes.” Then, choose each country where such alternate collection points are to be available. (Hold down the Ctrl key and click each country.)



*Enable Collection Points at Checkout*

6. To allow customers to purchase online, but pick up the order at a designated location, set **Enable Click and Collect at Checkout** to “Yes.”
7. Complete the following settings as needed.
  - a. Set **Ship to Applicable Countries** to one of the following:
 

All Allowed Countries	Customers from all <b>countries</b> specified in your store configuration can use Magento Shipping.
Specific Countries	Select each country in the list where Magento Shipping can be used.
  - b. Set **Show Method if Not Applicable** to one of the following:
 

Yes	Always shows the Magento Shipping method, even when not applicable.
No	Shows the Magento Shipping method only when applicable.



### Magento Shipping

This is where you can activate Magento Shipping. In order to use Magento Shipping you will require a shipping account.  
[Access the Magento Shipping Portal here](#)

**Version** [global] 1.5.1

**Enabled** [website] Yes

**Title** [store view] Magento Shipping

**Enable API Logging** [global] Yes  
Log all API communication. If set to No, only API errors will be logged.

**API Endpoint** [global]

**Account ID** [global]

**API Token** [global]

**Enable Collection Points at Checkout** [website] Yes

**Countries Available for Collection Points** [website]  
Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

**Enable Click and Collect at Checkout** [website] Yes

**Ship to Applicable Countries** [website] All Allowed Countries

**Ship to Specific Countries** [website]  
Afghanistan  
Åland Islands  
Albania  
Algeria  
American Samoa  
Andorra  
Angola  
Anguilla  
Antarctica  
Antigua and Barbuda

**Show Method if Not Applicable** [website] Yes

**Displayed Error Message** [store view] This shipping method is not available. To use this shipping method, please contact us.

**Sort Order** [website]

**Checkout View Settings** [website] [Configure](#)

**Advanced Settings** [website] [Configure](#)

*Magento Shipping*

## Step 4: Complete the Remaining Settings

1. The following configuration settings can be completed now, or at a later time.

### Checkout View Settings

The Checkout View Settings determine the options that appear as add-on delivery options during checkout.



*Magento Shipping Options During Checkout*

1. To complete the **Checkout View Settings**, tap **Configure**.



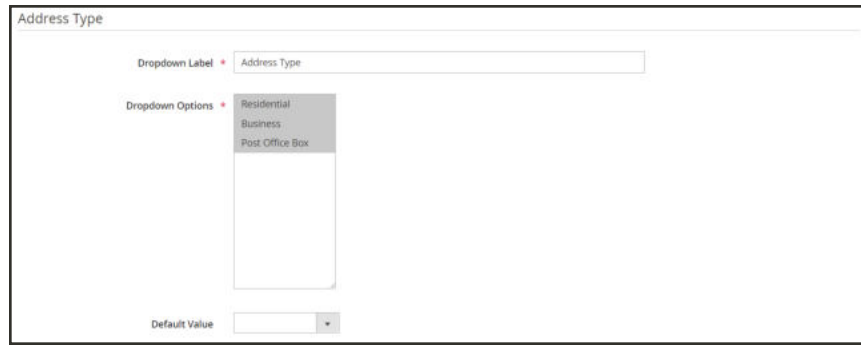
*Configure Checkout View Settings*

2. Mark the checkbox of each option that you want to appear during checkout. Then, complete the information in each section as needed.



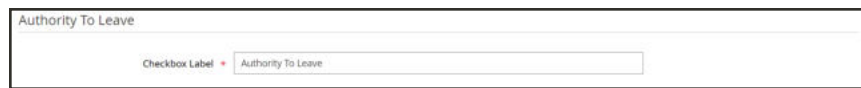
*Checkout View Settings*

3. In the **Address Type** section, do the following:
  - a. Enter the text that you want to use as the **Dropdown Label** for the Address Type options during checkout.
  - b. In the **Dropdown Options** list, select each option that you want to include as an address type.
  - c. Select the option that you want to be used as the **Default Value**.



*Address Type*

4. In the **Authority to Leave** section, enter the **Checkbox Label** for the option.



*Authority to Leave*

5. In the **Signature Required** section, enter the **Checkbox Label** for the option.



*Signature Required*

6. When complete, tap **Save**.

### Advanced Settings

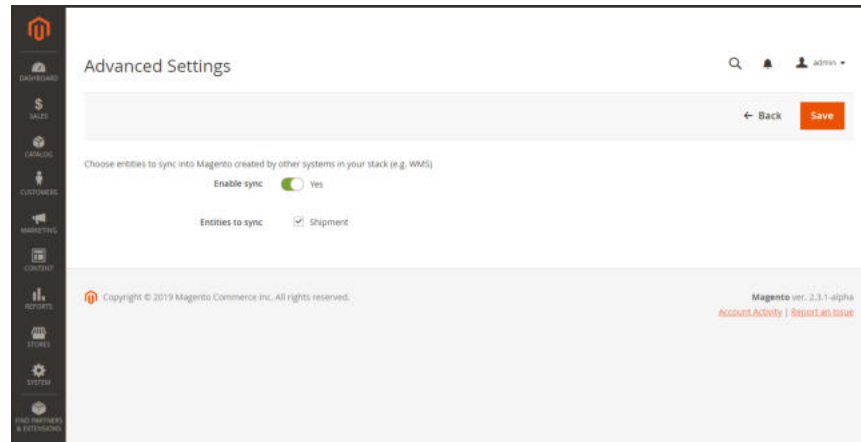
The following settings are required to synchronize your store with the Temando API to enable **batch processing**.

1. To configure the **Advanced Settings**, tap **Configure**. Then, do the following:



*Configure Advanced Settings*

2. To synchronize Magento with other systems in your stack, set **Enable sync** to “Yes.”
3. To synchronize shipment entities, mark the **Shipment** checkbox.
4. Tap **Save** to return to the Magento Shipping section.



*Advanced Settings - Sync Shipment Entity*

2. When complete, tap **Save Config.**

### Step 5: Complete the Shipping Profiles

The final step of the setup is to complete the **Location**, **Carrier**, and **Package** shipping profiles. After these profiles are complete, you can create **Shipping Experience Rules** to add logic and automate parts of the shipping workflow.

When the initial configuration is complete, you can access the Magento Shipping Portal directly from the Magento Admin. You can use either of the following methods to access and complete the shipping profile information from the Magento Admin.

The Magento Shipping portal session times out after thirty minutes of inactivity.

#### Method 1: Menu Options

On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose the following:

- **Carriers**
- **Locations**
- **Packaging**
- **Experiences**

#### Method 2: Configuration

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**. Then, scroll down to the **Magento Shipping** section. The shipping profile settings are at the end of the section.

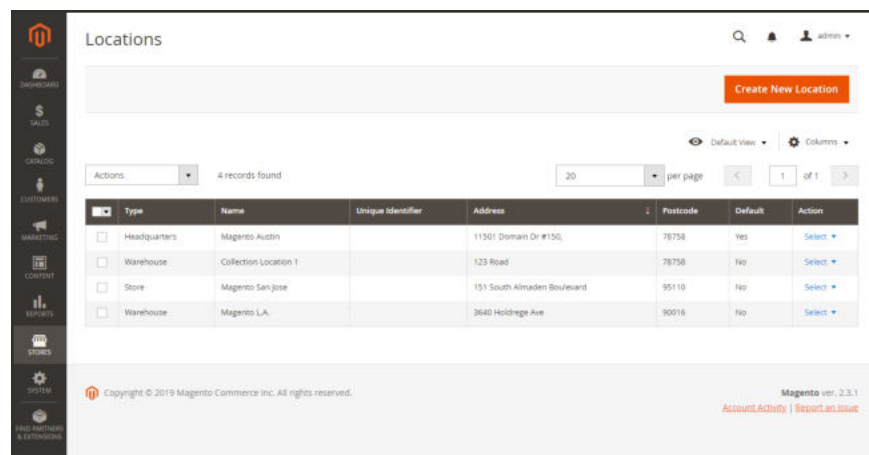
3. Tap **Configure** to complete each profile. Then, follow the instructions to complete the **Location**, **Carrier**, and **Package** information.
4. When the profiles are complete, create **Shipping Experience Rules** to add logic and automate parts of your shipping workflow.



*Shipping Profiles*

## Locations

The Locations grid lists the available shipping locations, and can include stores, warehouses, drop shippers, and company headquarters. Existing shipping locations can be edited or removed, and new shipping locations added. The locations that you enter appear in a drop-down list for each **Shipping Partner** profile, to identify the locations where the carrier is available.



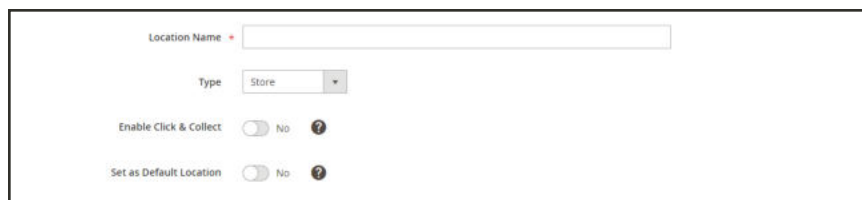
*Locations*

### To add a new shipping location:

1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Locations**.
2. Tap **Create New Location**. Then, do the following.

- a. Enter the **Location Name**, as you want it to appear throughout Magento Shipping.
- b. Set the location **Type** to one of the following:
  - Store
  - Warehouse
  - Drop Shipper
  - Headquarters
- c. To enable **Click & Collect**, set **Enable Click & Collect** to “Yes.”
- d. To make this the default pickup location for all shipments, set **Set as Default Location** to “No.”

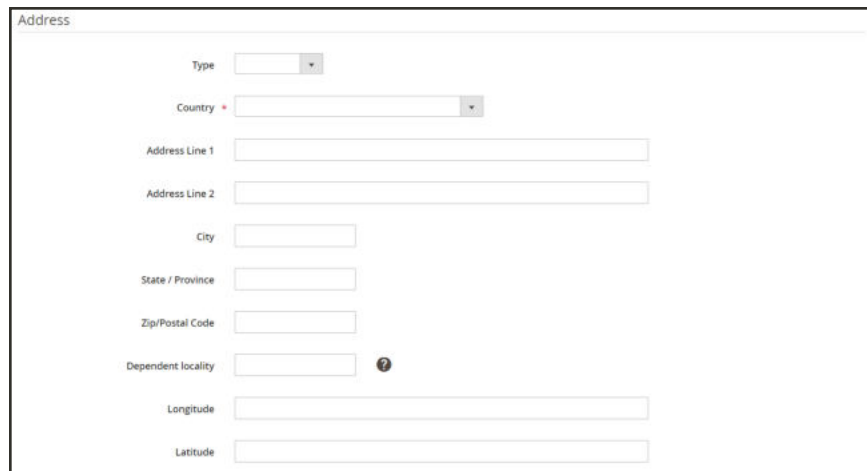
When creating a new **shipment**, the default location is entered automatically, but can be changed as needed.

A screenshot of the 'Basic Settings' form for a location. It features a text input field for 'Location Name', a dropdown menu for 'Type' currently set to 'Store', and two toggle switches. The first toggle is 'Enable Click & Collect', which is currently turned off (No). The second toggle is 'Set as Default Location', which is also currently turned off (No). Each toggle has a help icon (question mark) to its right.

*Basic Settings*

3. Complete the fields in the **Address** section. If you need help, click the Help ( ? ) button, or refer to the Field Descriptions at the end of this topic.
4. In the **Dependent Locality** field, enter an additional descriptive name to describe the location, such as the name of the neighborhood, small town, or suburb.
5. See the **Latitude/Longitude Finder** to get the GPS coordinates of the location. Then, enter the **Latitude** and **Longitude** coordinates.



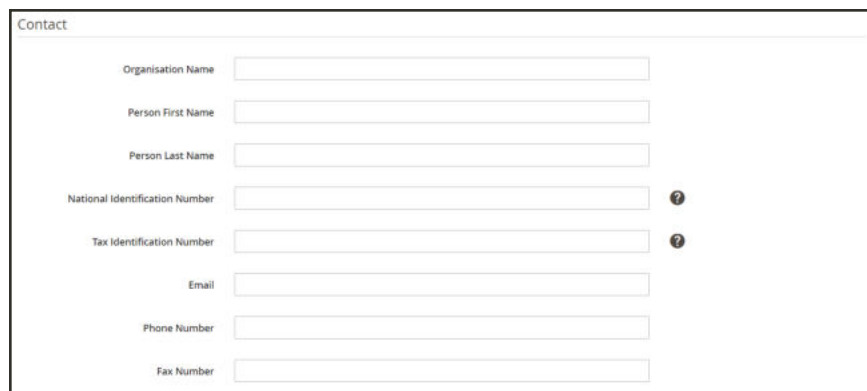


The screenshot shows the 'Address' form in Magento. It contains the following fields:

- Type:
- Country:
- Address Line 1:
- Address Line 2:
- City:
- State / Province:
- Zip/Postal Code:
- Dependent locality:  [?](#)
- Longitude:
- Latitude:

*Address*

6. Complete the fields in the **Contact** section. If you need help, click the **Help** ([?](#)) button, or refer to the [field descriptions](#) at the end of this topic.



The screenshot shows the 'Contact' form in Magento. It contains the following fields:

- Organisation Name:
- Person First Name:
- Person Last Name:
- National Identification Number:  [?](#)
- Tax Identification Number:  [?](#)
- Email:
- Phone Number:
- Fax Number:

*Contact*

7. When complete, tap **Save Config**.

## Field Descriptions

FIELD	DESCRIPTION
Location Name	The name that is used to refer to the shipping location throughout the Admin and storefront.
Type	Identifies the type of facility. Options: Store Warehouse Drop Shipper Headquarters
Enable Click & Collect	Determines if the location can be used as a collection point for Click & Collect fulfillment. Options: Yes / No.
Set as Default Location	Identifies the location as the default for all shipments. When creating a shipment, the default location can be overridden as needed. Options: Yes / No.

## ADDRESS

Type	Identifies the type of address. Options: Business/Residential
Country	The country where the shipping facility is located.
Address Line 1	The street address of the shipping location.
Address Line 2	Additional street address information, if needed.
City	The city where the shipping facility is located.
State / Province	The state or province where the shipping facility is located.
Zip / Postal Code	The ZIP or postal code where the shipping facility is located.
Dependent Locality	An additional description of the location, such as the name of a small town or suburb.
Longitude	The GPS longitude coordinate of the shipping facility. Use the <a href="#">Latitude/Longitude Finder</a> to get the GPS longitude coordinate of your location.
Latitude	The GPS latitude coordinate of the shipping facility. Use the <a href="#">Latitude/Longitude Finder</a> to get the GPS latitude coordinate of your location.

## CONTACT

**Field Descriptions (cont.)**

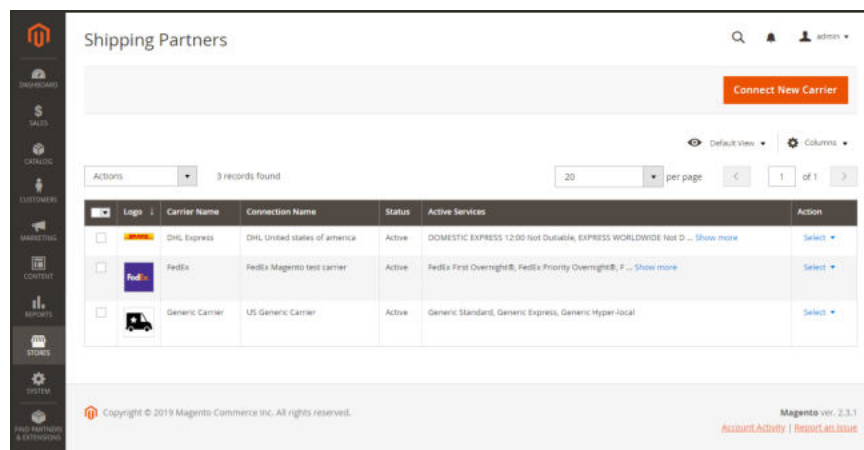
FIELD	DESCRIPTION
Organisation Name	The name of the organization that is associated with the shipping location.
Person First Name	The first name of the primary contact at the shipping location.
Person Last Name	The last name of the primary contact at the shipping location.
National Identification Number	The National Identification Number of the contact organization, if applicable. For example, the INSEE code (France).
Tax Identification Number	The Tax Identification Number assigned to the contact organization, if applicable. For example, TFN (Australia), TIN (France).
Email	The email address of the primary contact at the shipping location.
Phone Number	The telephone number of the shipping location.
Fax Number	The fax number of the shipping location.

## Shipping Partners




Carrier profiles for Magento Shipping are managed from the Stores menu. New connections to carriers can be added, and existing connections can be edited or deleted from the Shipping Partners grid.

In the United States, United Kingdom, and Australia, Magento Shipping supports FedEx pre-negotiated rates, and ad-hoc returns for FedEx, USPS, Australia Post, UK Mail, and DHL Express.

For the following countries, Magento Shipping carrier support is currently limited to DHL Express: Austria, Brazil, Canada, Denmark, France, Germany, Italy, Japan, Netherlands, Norway, Russia, Spain, Sweden, and Switzerland. Support for additional carriers will be available soon.



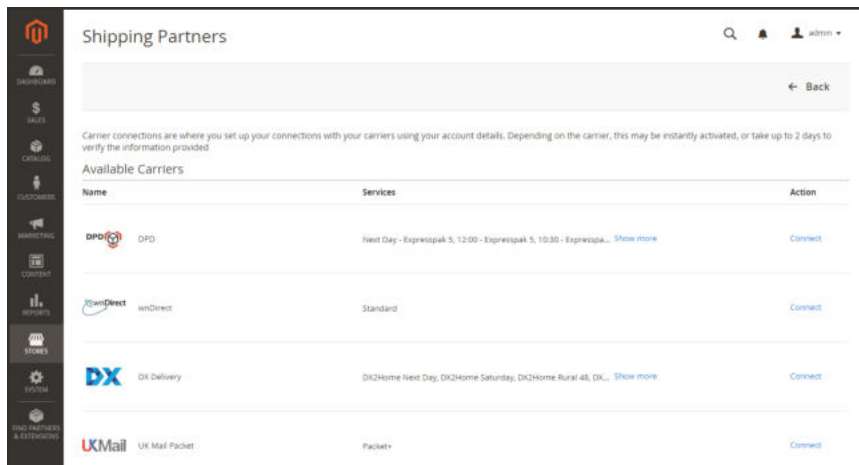
The screenshot displays the 'Shipping Partners' interface in the Magento Admin. It features a sidebar on the left with navigation options like 'STORES', 'REPORTS', and 'SETTINGS'. The main content area shows a table with three rows of carrier data. At the top right, there is a 'Connect New Carrier' button. Below the table, there is a footer with copyright information and the Magento version (2.3.1).

Logo	Carrier Name	Connection Name	Status	Active Services	Action
	DHL Express	DHL United states of america	Active	DOMESTIC EXPRESS 12:00 Not Outable, EXPRESS WORLDWIDE Not D ... <a href="#">Show more</a>	Select
	FedEx	FedEx Magento test carrier	Active	FedEx First Overnight®, FedEx Priority Overnight®, F ... <a href="#">Show more</a>	Select
	Generic Carrier	US Generic Carrier	Active	Generic Standard, Generic Express, Generic Hyper-local	Select

*Shipping Partners*

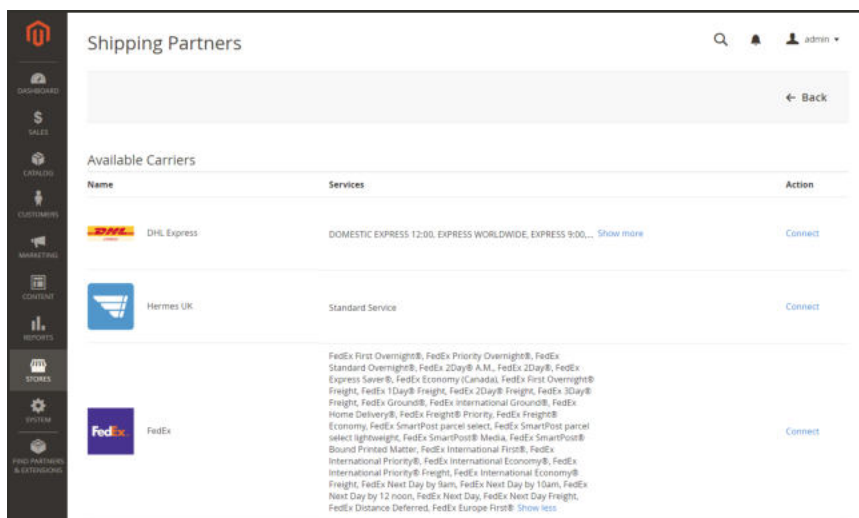
### To add a new carrier:

1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Carriers**.
2. To complete the setup, tap **Connect New Carrier**.



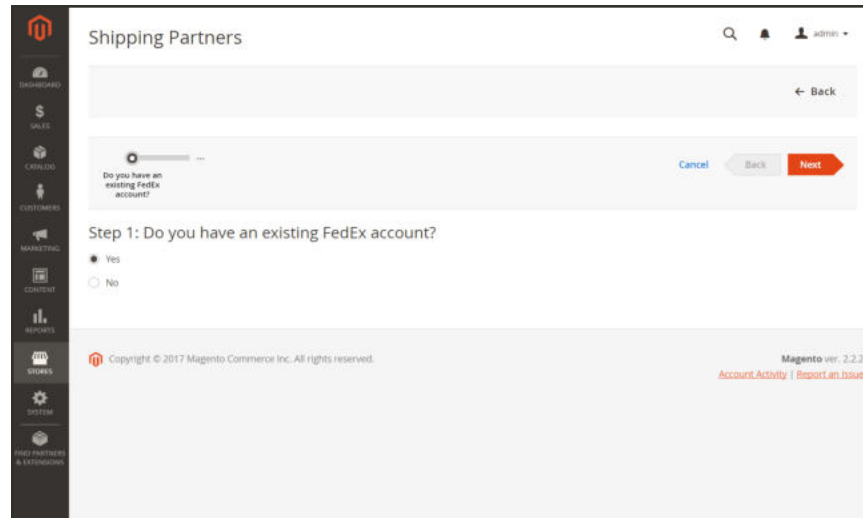
Available Carriers

3. Under **Available Carriers**, scroll down to find the shipping partner that you want to add. For a description of services, click **Show more**.
4. To complete the setup, click **Connect**.



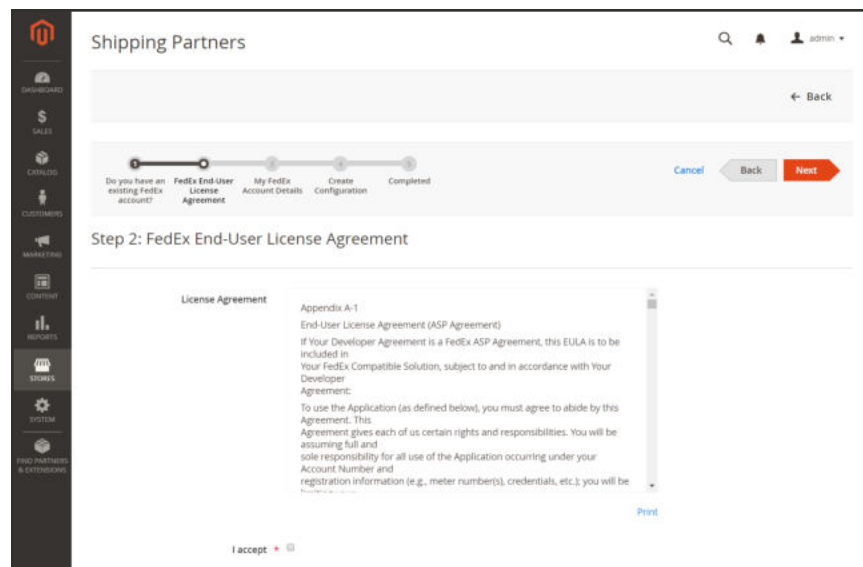
Shipping Partners

5. Complete each step as follows. Your progress is tracked at the top of the page.  
 If you do not have an account, you are instructed to contact the carrier. When your account is ready, return to this step and continue.
  - a. Under **Step 1**, choose “Yes” if you have an account with the carrier. Then, tap **Next**.



Step 1: Carrier Account

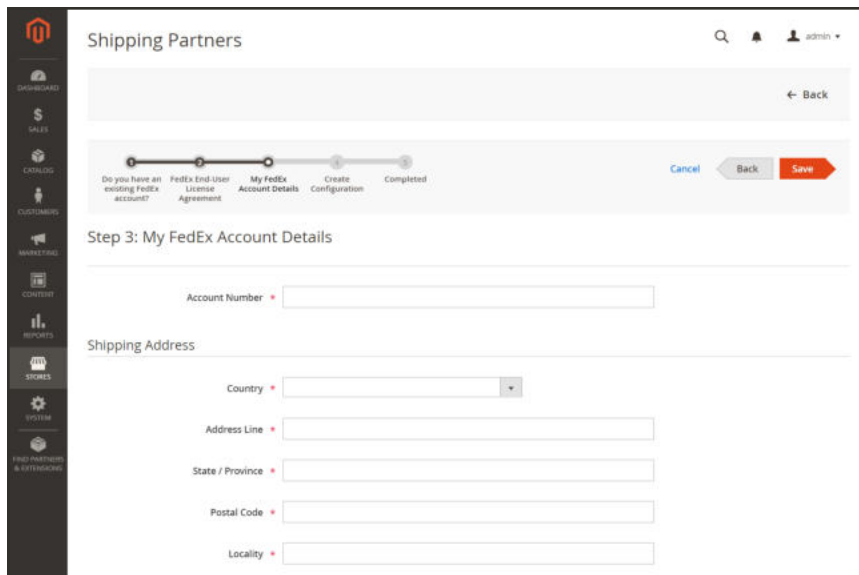
- b. Some carriers require that you accept the terms of a license agreement. If applicable, read the **License Agreement**. To continue, mark the **I accept** checkbox, and tap **Next**.



Step 2: License Agreement

- c. Under **Step 3**, enter your carrier **Account Number**. Then, complete the information in the **Shipping Address** and **User Contact and Address** sections. This information must match the information in your carrier account.

In the **Locality** field, enter the city.



Step 3: Account Details

**To edit an existing carrier:**

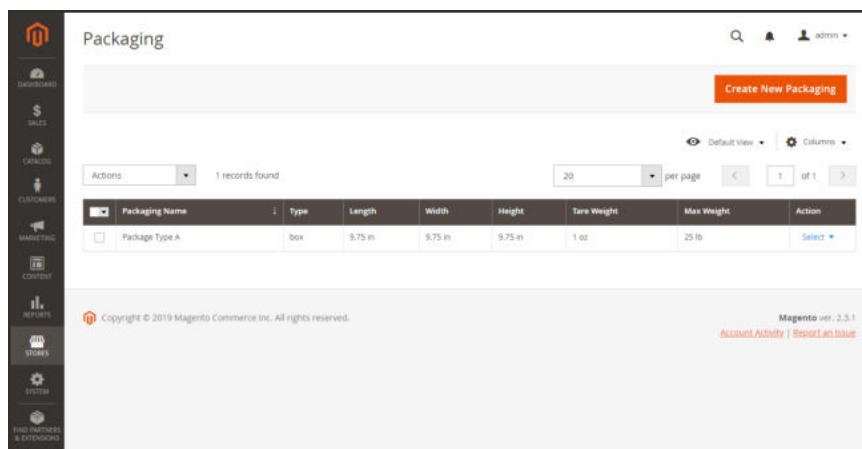
1. Find the carrier in the **Shipping Partners** grid. Then in the **Action** column, select **Configure**.
2. Make the necessary changes to the carrier profile.
3. When complete, tap **Save**.

**Field Descriptions**

FIELD	DESCRIPTION
Carrier Connection Nickname	The name that is used for the carrier during checkout.
Locations	Identifies each shipping location that can be used by the carrier.
Services	Identifies each shipping service that is provided by the carrier.

## Packaging

The Packaging grid lists the available packaging options that are available through your store. Existing packaging profiles can be edited or removed, and new packaging profiles added. The packaging options appear in a dropdown for each **Shipping Partner** profile, and identify each type of packaging that is supported by the carrier.



*Packaging*

### To add a package:

1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Packaging**. Then, do the following:
  - a. Tap **Create New Packaging**.
  - b. Enter the **Name** of the package.
  - c. Choose the package **Type**.
  - d. In the **Tare Weight** field, enter the weight of the empty package. Then, set **Tare Unit** to the unit of measurement that is used for the Tare Weight value.
  - e. Enter the **Maximum Weight** that can be placed in the package. Then, set **Maximum Weight Unit** to the unit of measurement that is used for the Maximum Weight value.

The screenshot shows the 'Basic Settings' form for creating a new package. The form includes the following fields:
 

- Name**: A text input field.
- Type**: A dropdown menu.
- Tare Weight**: A text input field with a help icon.
- Tare Weight Unit**: A dropdown menu with a help icon.
- Maximum Weight**: A text input field.
- Maximum Weight Unit**: A dropdown menu.

*Basic Settings*



2. Complete the fields in the **Outer Dimensions** section. If you need help, click the Help ( ? ) button, or refer to the Field Descriptions at the end of this topic.

*Outer Dimensions*

3. Complete the fields in the **Inner Dimensions** section. If you need help, click the Help ( ? ) button, or refer to the Field Descriptions at the end of this topic.

*Inner Dimensions*

4. When complete, tap **Save Config.**

### Field Descriptions

FIELD	DESCRIPTION
Name	The name of the packaging type.
Type	Describes the basic packaging type. Options: Box Carton Crate Cylinder Document Envelope Flat Pack Letter Pallet Parcel Satchel/Bag Other

**Field Descriptions (cont.)**

FIELD	DESCRIPTION										
Tare Weight	The weight of the empty container that is used to calculate the shipment load when added to content weight.										
Tare Weight Unit	The unit of measurement that is used to describe tare weight. <table border="0" data-bbox="649 462 958 672"> <tr> <td>g</td> <td>Gram</td> </tr> <tr> <td>oz</td> <td>Ounce</td> </tr> <tr> <td>kg</td> <td>Kilogram</td> </tr> <tr> <td>lb</td> <td>Pound</td> </tr> </table>	g	Gram	oz	Ounce	kg	Kilogram	lb	Pound		
g	Gram										
oz	Ounce										
kg	Kilogram										
lb	Pound										
Maximum Weight	The maximum weight allowed for this packaging type.										
Maximum Weight Unit	The unit of measurement that is used to describe the maximum weight. <table border="0" data-bbox="649 861 958 1071"> <tr> <td>g</td> <td>Gram</td> </tr> <tr> <td>oz</td> <td>Ounce</td> </tr> <tr> <td>kg</td> <td>Kilogram</td> </tr> <tr> <td>lb</td> <td>Pound</td> </tr> </table>	g	Gram	oz	Ounce	kg	Kilogram	lb	Pound		
g	Gram										
oz	Ounce										
kg	Kilogram										
lb	Pound										
<b>OUTER DIMENSIONS</b>											
Length	The package length when measured from the outside.										
Width	The package width when measured from the outside.										
Height	The package height when measured from the outside.										
Unit	Determines the unit of measurement for the outer dimensions of the package. Options: <table border="0" data-bbox="649 1470 974 1743"> <tr> <td>cm</td> <td>Centimeter</td> </tr> <tr> <td>in</td> <td>Inch</td> </tr> <tr> <td>m</td> <td>Meter</td> </tr> <tr> <td>mm</td> <td>Millimeter</td> </tr> <tr> <td>ft</td> <td>Foot</td> </tr> </table>	cm	Centimeter	in	Inch	m	Meter	mm	Millimeter	ft	Foot
cm	Centimeter										
in	Inch										
m	Meter										
mm	Millimeter										
ft	Foot										

**INNER DIMENSIONS**

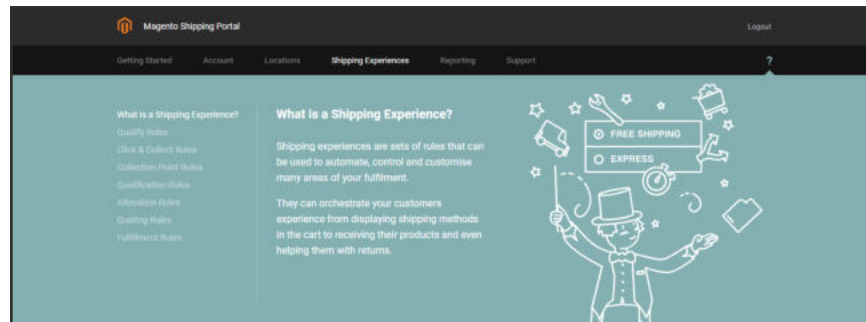
**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Length	The package length when measured from the inside.
Width	The package width when measured from the inside.
Height	The package height when measured from the inside.
Unit	Determines the unit of measurement for the inner dimensions of the package. Options:  cm            Centimeter  in             Inch  m              Meter  mm            Millimeter  ft              Foot

## Shipping Experience Rules

Use the Shipping Experiences option in the Magento Shipping Portal menu to create rules that automate the shipping process. Each shipping experience rule is associated with a specific step in the shipment workflow.

Because most shipping experience rules reference information from the **Locations**, **Shipping Partners**, and **Packaging** configuration, you should complete the basic setup of each profile before creating rules.



*Shipping Experience*

### Shipment Workflow



**Your customer is ready to check out their cart.**

- Qualify Rules



**You receive your customer's order.**

- Allocation Rules
- Quoting Rules
- Batch Fulfillment Rules
- Fulfillment Rules



**Shipment is dispatched.**

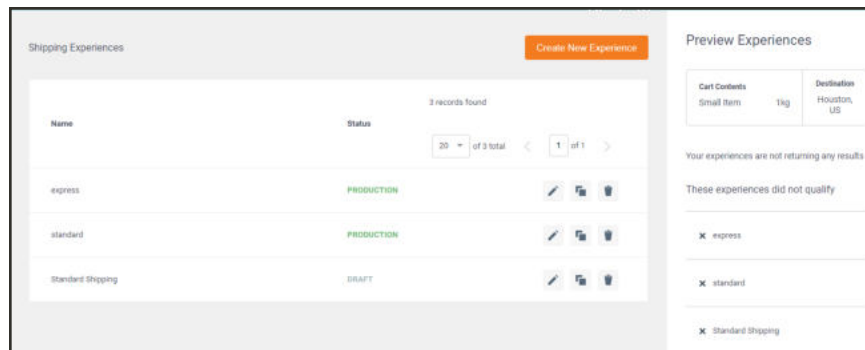


**Delivery arrives.**

The following instructions show how to create a Qualify rule; however, the process is essentially the same for all shipping experience rules. First, describe the condition, then, choose an operator, and define the action to be taken. You can follow these basic instructions to create any type of rule. Refer to the [field descriptions](#) for more information about different rule types and options.

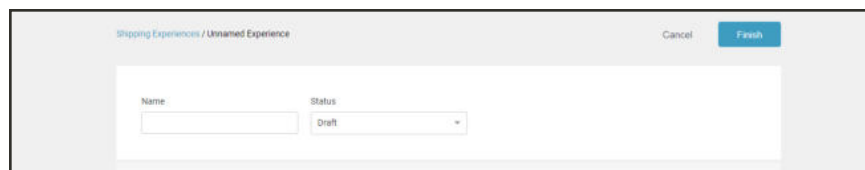
**To create a shipping experience rule:**

1. In the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Experiences**.
2. Tap **Create New Experience**. Then, do the following:



*Shipping Experiences*

- a. Enter a descriptive **Name** for the new rule.
- b. For now, accept the default **Status** of “Draft.” When you are ready to “go live” with the rule in your store, you can change Status to “Production.”



*Experience Name and Status*

- c. Choose the type of rule that you want to create. In the rule section, tap **Create Rule**. Then, do the following:

This example shows how to create a Qualify Rule. Notice the icon and note before each section is mapped to the corresponding step in the shipment workflow.



*Create Rule*

- d. Enter a brief **Description** of the rule that states its purpose and the conditions that trigger the rule.

 A screenshot of the Magento Shipping Experience Rules configuration interface. The page title is "Shipping Experience / Unnamed Experience / New quality rule". There are "Cancel" and "Save" buttons in the top right. The main content area has a "Description" label and a large text input field.

*Description*

3. In the **Conditions** section, choose the **Condition** that must be met to trigger the rule.

Think about conditions that are required to trigger the rule. For example, the condition might be, "Country is China," or "Country is not China." You can also combine multiple conditions, such as, "Country is China or Hong Kong," or "Country is China and order items total weight is less than 50 pounds (lb)."

 A screenshot of the "Conditions" section in the Magento Shipping Experience Rules configuration. The "Condition" dropdown menu is open, showing "Always" as the selected option. There are "Add Condition" and "Add Condition Block" buttons below the dropdown.

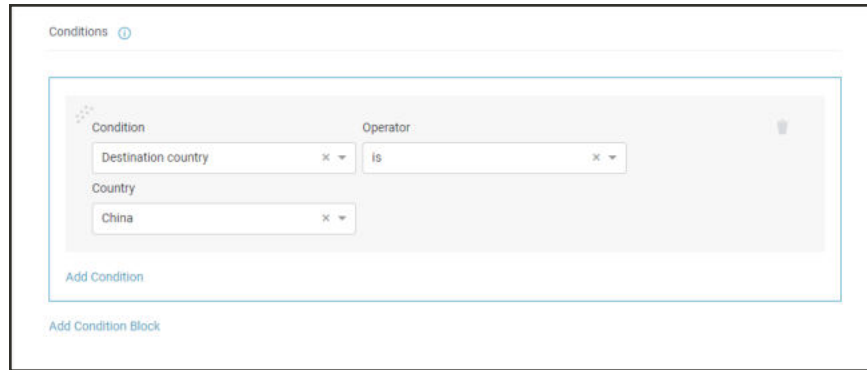
*Conditions*

4. Choose the **Operator** that is needed to describe the condition. Then, do the following:

 A screenshot of the "Conditions" section in the Magento Shipping Experience Rules configuration. The "Condition" dropdown menu is open, showing "Destination country" as the selected option. The "Operator" dropdown menu is also open, showing options: "any of", "is", "is not", and "not any of". There are "Add Condition" and "Add Condition Block" buttons below the dropdowns.

*Choose an Operator*

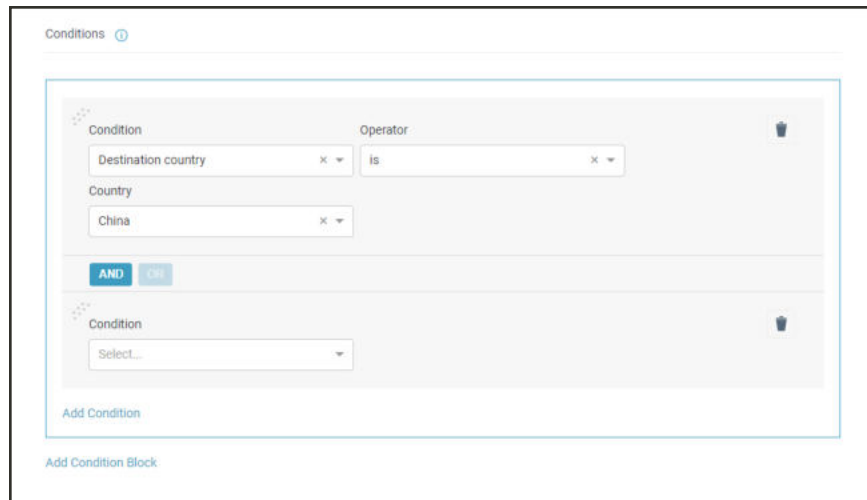
- a. Complete the condition by entering appropriate values in the remaining field(s).



*Complete the Condition*

- b. To add another condition, click **Add Condition**. Then, choose the logical operator that describes how the conditions are to be applied.

- AND Triggers the rule when both the previous condition and the new condition are met.
- OR Triggers the rule when either the previous condition, or the new condition is met.



*Add Another Condition*

- c. Repeat the previous steps to complete the new condition.

Conditions ⓘ

Condition Operator

Destination country × is ×

Country

China ×

AND OR

Condition Operator

Order items total weight × less than or equal ×

Value

50

Unit

Pounds (lb) ×

Add Condition

Add Condition Block

*Completed Condition*

5. In the **Outcomes** section, do the following:
  - a. Choose the **Action** that applies when the conditions are met.
  - b. Enter the **Shipping Method Label** that appears during checkout.
  - c. Choose the **Currency** to be used to display the shipping charge.
  - d. To add an additional action, click **Add Outcome**.

Outcomes

Action Shipping Method Label Cost

Show Shipping Method (Flat Rate) × Free Shipping 0

As shown on checkout page

Currency

USD ×

Add Outcome

*Outcomes*

6. When complete, tap **Save**.

The description of the new rule appears in the list of Qualify Rules.





*Qualify Rules*

7. Tap **Finish** to save the rule and exit.

### Field Descriptions

FIELD	DESCRIPTION
Name	A descriptive internal reference to identify the rule.
Status	Determines if the rule is active in the store. Options: Draft / Production

### QUALIFY RULES

**Qualify Rules** Specifies the shipping methods that you want to make available to customers during checkout, such as Flat Rate, Collection Point, and Click & Collect. If more than one qualify rule exists, the first one to have its conditions met is used.

Earlier version of Magento Shipping had separate rules for Qualification, Click & Collect, and Collection Point. These have now been consolidated under Qualify Rules. Any rules created with an earlier version are automatically migrated to the Outcome section of a Qualify rule.

Description	A brief description of the rule for internal reference.
Conditions	Determines the conditions that must be met to trigger the rule. A simple condition might have two parts (or operands), separated by an operator. The options for the first part of the expression are listed below. The options for the second part of the expression vary, depending upon the first option. For example, if the first part of the condition is "Destination country," the second part will be a list of countries where the condition applies. The Conditions block walks you through the process of building the condition. and presents the available options for the condition. Options for the first part of the condition: Always Destination country

**Field Descriptions (cont.)**

FIELD	DESCRIPTION				
	Destination postal code Order items with SKU Order items with name Order items with categories Order items with weight Order items with quantity Order items with price Order items total weight Order total Ordered at				
Operator	<p>The following operators can be placed between the two parts of the condition. Options:</p> <ul style="list-style-type: none"> <li>any of</li> <li>is</li> <li>is not</li> <li>not any of</li> </ul> <p>Use the following logical operators to determine how multiple conditions are used to trigger the rule.</p> <table border="0"> <tr> <td data-bbox="654 1115 889 1213">AND</td> <td data-bbox="906 1115 1458 1213">(Default) Triggers the rule when both the previous condition and the new condition are met.</td> </tr> <tr> <td data-bbox="654 1245 889 1318">OR</td> <td data-bbox="906 1245 1458 1318">Triggers the rule when either the previous condition, or the new condition is met.</td> </tr> </table>	AND	(Default) Triggers the rule when both the previous condition and the new condition are met.	OR	Triggers the rule when either the previous condition, or the new condition is met.
AND	(Default) Triggers the rule when both the previous condition and the new condition are met.				
OR	Triggers the rule when either the previous condition, or the new condition is met.				
Outcomes	<p>The outcome describes the action that is taken when the condition is met. The selection of options varies by type of condition. Actions:</p> <table border="0"> <tr> <td data-bbox="654 1451 889 1654">Offer a flat rate</td> <td data-bbox="906 1451 1458 1654">           Additional fields:            Shipping Method Label (as shown on checkout page)            Cost            Currency         </td> </tr> <tr> <td data-bbox="654 1675 889 1778">Offer collection points locations</td> <td data-bbox="906 1675 1458 1778">           In the list, mark the checkbox of each carrier that you want to associate with the action.            Additional fields:         </td> </tr> </table>	Offer a flat rate	Additional fields: Shipping Method Label (as shown on checkout page) Cost Currency	Offer collection points locations	In the list, mark the checkbox of each carrier that you want to associate with the action. Additional fields:
Offer a flat rate	Additional fields: Shipping Method Label (as shown on checkout page) Cost Currency				
Offer collection points locations	In the list, mark the checkbox of each carrier that you want to associate with the action. Additional fields:				

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
	Shipping Method Label (as shown on checkout page) Cost Currency
Offer click and collect locations	In the list, mark the checkbox of each location that you want to associate with the action. Additional fields: Shipping Method Label (as shown on checkout page) Cost Currency
	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;">                     Click &amp; Collect must be enabled in the <b>Magento Shipping</b> configuration for each store or warehouse location.                 </div>

**ALLOCATION RULES**

Allocation Rules	Controls the automated processing of shipments.
Description	A brief description of the rule for internal reference.
Conditions	Determines the conditions that must be met to trigger the rule. Options: Always Order items with SKU Order items with name
Operator	(Same as for Qualify Rules)
Outcomes	Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions:  Set Origin Location    Displays list of <b>locations</b> .  Set Package            Additional fields: Package Type Value Unit

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
<b>QUOTING RULES</b>	
Quoting Rules	Control the carrier service selection. The rule is triggered when you get quotes while processing an order.
Description	A brief description of the rule for internal reference.
Conditions	Determines the conditions that must be met to trigger the rule. Options: Always Destination country Destination postal code Packages gross weight Origin Location Type Destination Location Type Signature Required Authority to Leave
Operator	(Same as for Qualify Rules)
Outcomes	Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions:  Quote With All Carriers      Makes the quote available to all carriers.  Quote With Carrier Services      In the list, mark the checkbox of each carrier that you want to associate with the action.
<b>BATCH FULFILLMENT RULES</b>	
Batch Fulfillment Rules	Allows you to run automated batch fulfillment processing.
Description	A brief description of the rule for internal reference.
Conditions	Specifies the conditions that must be met to trigger a batch fulfillment rule. Option: Always
Operator	(Same as for Qualify Rules)
Outcomes	Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions:

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
	Book Shipment with Cheapest Carrier Service
	In the list, mark the checkbox of each carrier that you want to associate with the action.
	Book Shipment with Carrier Service
	In the list, mark the checkbox of each carrier that you want to associate with the action.

**FULLFILLMENT RULES**

Fulfillment Rules	Allows you to override the default carrier service, and choose another based on a set of conditions.
Description	A brief description of the rule for internal reference.
Conditions	Specifies the conditions that must be met to trigger a batch fulfillment rule. Options: Destination Location Type Signature Required Authority to Leave Shipment Status Packed Items with SKU Packed Items with Name
Operator	(Same as for Qualify Rules, although selection might vary for condition.)
Outcomes	Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions:

## Field Descriptions (cont.)

FIELD	DESCRIPTION
Include a shipment return label	<p>In the list, mark the checkbox of each carrier that you want to associate with the action.</p> <p>This action generates a return shipment that can be accessed only from Magento Commerce. The return label is added to the package at the time of fulfillment. Any service that is marked with an asterisk (*) might have additional charges at the time of booking.</p> <div data-bbox="906 661 1414 835" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Make sure that you understand which type of service you have selected for your returns, and how the carrier charges for that service.</p> </div>
Book Shipment with Cheapest Carrier	<p>In the list, mark the checkbox of each carrier that you want to associate with the action.</p>
Book Shipment with Carrier Service	<p>In the list, mark the checkbox of each carrier that you want to associate with the action.</p>

## Click & Collect

Click & Collect allows customers to order online, and pick up their orders at the store or another designated location. For a description of how Click & Collect is specified during checkout, see: [Customer Experience](#).

Every Click & Collect order generates a pickup record. Like a shipment, the pickup record is associated with the specific order. The main difference between the two is that a pickup does not have packaging or quote/booking requirements. Because Click & Collect is available only from the storefront, it cannot be used for orders that are created from the Admin.

### Before you begin:

1. Complete the setup of your Click & Collect [Locations](#). The location name, address, and opening/closing hours are visible to the customer during checkout. Special hours are included if they go into effect within the next seven days.

The pickup location that a customer chooses during cannot be changed from the Admin.

2. Create a Qualify [Shipping Experience Rule](#) with the outcome set to “Offer click and collect locations.” The rule can be configured to offer one or more locations. If the Click & Collection location is set to “All,” any new locations appear to the customer during checkout.
3. In the Magento Shipping [configuration](#), set **Enable Click and Collect** to “Yes.”

### To fulfill a Click & Collect order:

1. Navigate to the Pickups page.

The first step to fulfill a pickup is to navigate to the Pickups page. The Pickups grid lists all pickups that have been created.

2. Filter the Pickups grid.

The Pickups grid can be filtered by a variety of fields, with the main used being Origin Location and Status. Any filter settings made by the Admin user are retained for that user’s future sessions.

If you have multiple locations, it is recommended that you filter the grid by Origin Location to ensure that only orders which are to be picked up at your location listed. You can also filter the list based on a Status field value of “Pickup Requested” to ensure that the list includes only new pickup records that are not yet in process.

3. Print packing slips.

To print packing slips for all filtered pickups, choose Select All, and set the Action control to :Print Packing Slips.”

The packing slips are downloaded as a single PDF file, which can be printed immediately, or saved and printed later. Each packing slip contains the customer details, the products ordered, and a barcode that references the pickup.

**4.** Indicate an order is ready for pickup.

When the orders have been picked and set aside, they are marked “Ready for Pickup.” The customer is notified by email that their order is ready for pickup.

To prevent duplication, any items included in pickups that are marked “Ready for Pickup” are not available to be allocated to a package.

**5.** After the customer picks up the package at the designated location, change the status in the upper-right corner of the pickup record to “Picked Up.”

### Scenario 1: All Items Ready for Pickup

By default, a pickup record indicates that all items in the order are packed. Tap **Ready for Pickup** to trigger the following events:

- The status of the pickup changes to “Ready for Pickup.”
- An email is sent to notify the customer that the order is ready to collect.
- The Pickup page closes, and you return to the Pickups grid.

### Scenario 2: Partial Order Ready for Pickup

If only some of the items are available, adjust the **Qty Packed** values to reflect the items that are ready for pickup.

Tap **Ready for Pickup** to initiate the partial pickup process. The following events take place:

- The status of the partial pickup changes to “Ready for Pickup.”
- An email is sent to notify the customer that the specified items are ready to collect.
- A new pickup record with a status of “Pickup Requested” is created for the remaining items.
- The Pickup page closes, and you return to the Pickups grid.

The remaining pickup items can be fulfilled as either a separate pickup or shipment when the items become available.

After the customer collects the items, the pickup record is marked, “Picked Up,” and an email is sent to the customer to confirm that the items have been fulfilled.

### To view a pickup record:

Use either of the following methods to view a pickup record:

#### Method 1: Scan the Packing Slip Barcode

Simply scan the barcode from the packing slip to view the corresponding pickup record. The **Go to Pickup** field in the upper-right corner of the Pickup page is designed to automatically accept a barcode that is scanned from a packing slip.



**Method 2: View Action**

Find the record in the Pickup grid. Then in the **Action** column, click **View**.

**To cancel a pickup:**

Open the pickup record, and tap **Cancel Pickup**.

- If the status of the pickup was “Ready for Pickup,” the items are returned to inventory.
- The customer is notified by email that the pickup has been canceled.

## Collection Points

Collection points allow a customer to place an order online and have it shipped to a designated collection point, rather than to their address. For a description of how collection points are specified during checkout, see: [Customer Experience](#).

From a Merchants perspective, you have full control over which carrier’s collection points will be made available to customers in the checkout. The fulfilment workflow is the same as Shipments.

Before you begin:

There are two areas of configuration that need to be completed before Customers can start nominating that an order be shipped to a Collection Point.

### Shipping Experience Setup

Create a Qualify rule that offers collection point locations during checkout. The collection points can be specified per carrier, but are combined into a single list for the customer.

### All Carriers

This is the default filter for offering collection point locations. If a rule is configured in this fashion, new carriers that are configured which support collection points will automatically be presented to a customer without having to update the experience rule.

### Specific Carriers

A rule can be configured to include a selection of one or more carriers. For example, you might use this to apply different flat rate shipping rates per carrier, depending on the collection point selected.

### Magento Shipping configuration

When enabled, the “Send to Collection Point” configuration setting causes the collection point option to be included under Shipping Methods during checkout.

## Troubleshooting



### Fail to Book

Issue

At least one shipment in a batch fails to book.

Workaround

1. Click **Find Solutions**.  
The Find Solutions page provides details about each failed shipment, including Magento Order ID, Ship-to Name, Destination Address, and Reason for Failure.
2. To examine the individual order associated with a shipment that failed to book, click **View**.



## CHAPTER 69:

# Carriers

If you have a commercial account with a supported carrier, you can offer your customers the convenience of choosing that carrier during checkout. The rates are automatically downloaded, so you do not need to look up the information.

Before you can offer your customers a selection of shipping carriers, you must first complete the [shipping settings](#) to establish the point of origin for your store. Then, complete the configuration for each carrier service that you want to offer. The configuration options vary for each carrier. However, all require that you first open a shipping account with the carrier, and enter your account number or user ID, and the gateway URL to their system into the configuration of your store. See [Magento Marketplace](#) for additional shipping services for your Magento Open Source installation.

See the [online user guide](#) for step-by-step configuration instructions for the following carriers:



## UPS

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United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.



## USPS

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The United States Postal Service is the independent postal service of United States government. USPS offers domestic and international shipping services by land and air.



## FedEx

---

Offers domestic and international shipping services by land and air to more than 220 countries.



## DHL

---

Offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

## CHAPTER 70:

# Shipping Labels

Magento Open Source includes a high level of integration with major shipping carriers, which gives you access to carrier shipping systems to track orders, create shipping labels, and more. Shipping labels can be created for regular shipments and products with return merchandise authorization. In addition to the information provided by the shipping carrier, the label also includes the Magento order number, number of the package, and the total quantity of packages for the Magento shipment.



*USPS Priority Shipping Label*

## Shipping Label Workflow

Shipping labels can be produced at the time a shipment is created, or later. Shipping labels are stored in PDF format and are downloaded to your computer.

**1**

**Administrator submits shipping label request.** The store Administrator completes the information necessary to generate labels, and submits the request.

**2**

**Request sent to carrier.** Magento contacts the shipping carrier, and creates an order in the carrier's system. A separate order is created for each package that is shipped.

**3**

**Carrier sends label and tracking number.** The carrier sends the shipping label and tracking number for the shipment.

- A single shipment with multiple packages receives multiple shipping labels.
- If you generate the same shipping labels multiple times, the original tracking numbers are preserved.
- For returned products with RMA numbers, the old tracking numbers are replaced with new ones.

**4**

**Administrator downloads and prints the label.** After the shipping label is generated, the new shipment is saved and the label can be printed. If the shipping label cannot be created due to problems with the connection or any other reason, the shipment is not created.

Depending on your browser settings, the PDF file can be opened and printed. Each label appears on a separate page in the PDF.

## Configuring Shipping Labels

The following settings must be made at the product level, as well as in the configuration of each carrier that is used to print labels. To print labels, all carriers require that you open an account. Then, complete the configuration in your store for each carrier that you plan to use.

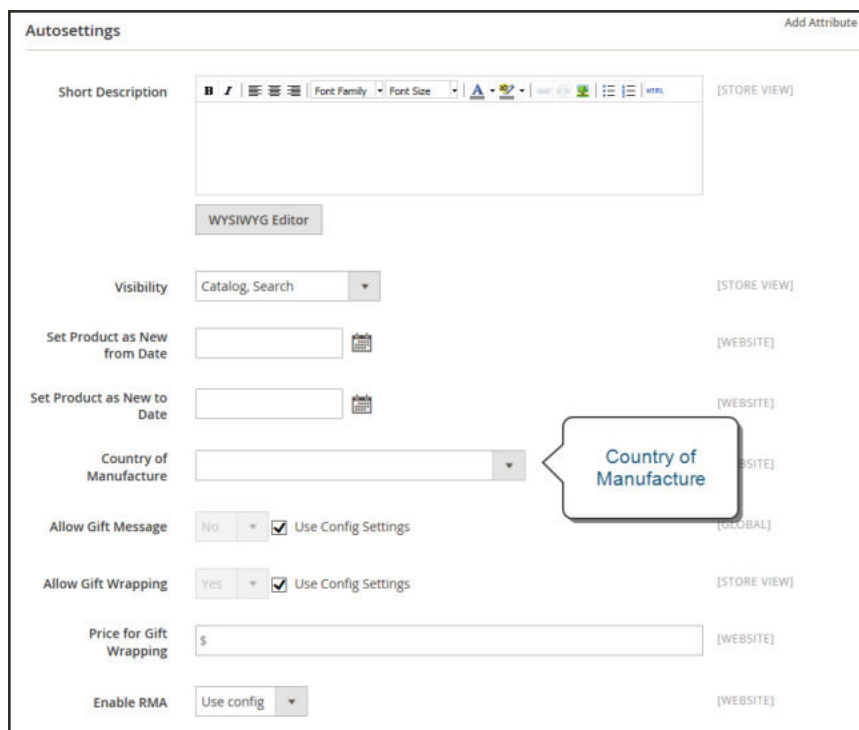
### Step 1: Verify the Country of Manufacture

The country of manufacture is required for all products that are shipped internationally by USPS and FedEx. If you have many products that need to be updated, you can either **import** the updates, or use the Inventory grid to update multiple records.

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.

#### Method 1: Update a Single Record

- a. In the grid, find the product to be updated, and open in edit mode.
- b. In the panel on the left under **Advanced Settings**, choose **Autosettings**.
- c. Update the **Country of Manufacture** field.
- d. When complete, tap **Save**.



The screenshot shows the 'Autosettings' panel in the Magento Admin interface. The panel is titled 'Autosettings' and has an 'Add Attribute' link in the top right corner. The settings are organized into sections with their respective scopes:

- Short Description:** A rich text editor with a toolbar and a 'WYSIWYG Editor' button. Scope: [STORE VIEW].
- Visibility:** A dropdown menu set to 'Catalog, Search'. Scope: [STORE VIEW].
- Set Product as New from Date:** A date input field with a calendar icon. Scope: [WEBSITE].
- Set Product as New to Date:** A date input field with a calendar icon. Scope: [WEBSITE].
- Country of Manufacture:** A dropdown menu. A callout box with the text 'Country of Manufacture' points to this field. Scope: [WEBSITE].
- Allow Gift Message:** A dropdown menu set to 'No' and a checked checkbox for 'Use Config Settings'. Scope: [GLOBAL].
- Allow Gift Wrapping:** A dropdown menu set to 'Yes' and a checked checkbox for 'Use Config Settings'. Scope: [STORE VIEW].
- Price for Gift Wrapping:** A text input field with a '\$' symbol. Scope: [WEBSITE].
- Enable RMA:** A dropdown menu set to 'Use config'. Scope: [WEBSITE].

*Country of Manufacture*

**Method 2: Update Multiple Records**

- a. In the grid, mark the checkbox of each product to be updated. For example, all products that are manufactured in China.
- b. Set the **Actions** control to “Update Attributes.” Then, tap **Submit**.
- c. In the **Update Attributes** form, find the **Country of Manufacture** field and mark the **Change** checkbox. Then, choose the country.
- d. When complete, tap **Save**.

**Step 2: Verify the Store Information**

- 1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the panel on the left, under **Sales**, choose **Shipping Settings**. then, do the following:
  - a. Expand ☺ the **Origin** section, and verify that the following fields are complete:

Street Address	The street address of the place from which shipments are sent. For example, the location of your company or warehouse. This field is required for shipping labels.
Street Address Line 2	Any additional address information, such as the floor, entrance and so on. We strongly recommend that you use this field.


*Origin*

- b. In the panel on the left under **Sales**, choose **Shipping Methods**. Then, expand ☺ the **USPS** section, and verify that the following fields are complete:


Secure Gateway URL	Magento automatically enters the gateway URL.
Password	The password is provided by USPS, and gives you access to their system through Web Services.



Length, Width  
Height, Girth      The default dimensions of the package. To make these fields appear, set Size to “Large.”

- c. Expand  the **FedEx** section, and verify that the following fields are complete:
  - Meter Number
  - Key
  - Password

This information is provided by the carrier, and is required to gain access to their system through Web Services.

- d. In the panel on the left under **General**, choose **General**. Expand  the **Store Information** section, and verify that the following fields are complete:

Store Name              The name of the store or store view.

Store Contact  
Telephone              The telephone number of the primary contact for the store or store view.

Country                The country where your store is based.

VAT Number            If applicable the Value Added Tax number of your store. (Not required for stores based in the U.S.)

Store Contact  
Address                The street address of the primary contact for the store or store view.

- e. If you have multiple stores, and the contact information differs from the default, set **Store View** for each, and verify that the information is complete. If the information is missing, you’ll get an error when you try to print the labels.

*Store Information*

3. When complete, tap **Save Config.**

### Carrier Requirements

CARRIER	REQUIREMENTS
USPS	Requires a USPS account. As of February 23, 2018, USPS requires all shipping labels to include postage.
UPS	Requires a UPS account. Shipping labels are available only for shipments that originate in the U.S. Specific credentials are required for stores outside the US.
FedEx	Requires a FedEx account. For stores outside of the U.S., shipping labels are supported for international shipments only. FedEx does not allow domestic shipments that originate outside of the U.S
DHL	Requires a DHL account. Shipping labels are supported only for shipments that originate in the U.S.

## Creating Shipping Labels

To create shipping labels, you must first set up your shipping carrier account to support labels. Then, follow the prompts to enter a description of the package and its contents.

### Process Overview:

Step 1: [Contact Your Shipping Carriers](#)

Step 2: [Update the Configuration for Each Carrier](#)

Step 3: [Create Shipping Labels](#)

Step 4: [Print the Labels](#)

### Step 1: Contact Your Shipping Carriers

Before you begin, make sure that your shipping accounts are set up to process labels. Some carriers might charge an additional fee to add shipping labels to your account.

1. Contact each carrier that you use to activate shipping labels for your store.
2. Follow the instructions provided by each carrier to add shipping label support to your account.

FedEx            Contact [FedEx Web Services](#) regarding their label evaluation process.

USPS            Contact [uspstechsupport@esecurecare.net](mailto:uspstechsupport@esecurecare.net) to request that API Signature Confirmation V3 be enabled for your live USPS API Access account.

UPS             Contact [UPS](#) to confirm your account type supports shipping labels. To generate shipping labels, you must use the UPS XML option.


DHL             Contact the [DHL Resource Center](#) to learn more about their services or send an inquiry through their [Contact Center](#).

### Step 2: Update the Configuration for Each Carrier

1. Make sure that your [Store Information](#) is complete.
2. Follow the instructions below for each carrier account that has been activated for label printing.

## UPS Configuration

United Parcel Service ships both domestically and internationally. However, shipping labels can be generated only for shipments that originate within the United States.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand  the **UPS** section. Then, verify that your UPS **Shipper Number** is correct. Your Shipper Number appears only when United Parcel Service XML is enabled.
4. When complete, tap **Save Config**.


## USPS Configuration

The United States Postal Service ships both domestically and internationally.

1. Continuing in the **Shipping Methods** configuration, expand  the **USPS** section. Then, do the following:
  - a. Verify that the **Secure Gateway URL** is entered. The correct URL should be entered automatically.
  - b. Enter the **Password** provided to you by USPS.
  - c. Set **Size** to “Large.” Then, enter the following dimensions:
    - Length
    - Width
    - Height
    - Girth
2. When complete, tap **Save Config**.


## FedEx Configuration

FedEx ships domestically and internationally. Stores located outside the United States can create FedEx labels for international shipments only.

1. Continuing in the **Shipping Methods** configuration, expand  the **FedEx** section. Then, make sure that the following FedEx credentials are correct:
  - Meter Number
  - Key
  - Password
2. When complete, tap **Save Config**.

## DHL Configuration

DHL provides international shipping services.

1. Continuing in the **Shipping Methods** configuration, expand  the **DHL** section. Then, do the following:
  - a. Verify that the **Gateway URL** is entered. The correct URL should be entered automatically.
  - b. Make sure that the following credentials are complete:
    - Access ID
    - Password
    - Account Number
2. When complete, tap **Save Config**.

### Step 3: Create Shipping Labels

**Process Overview:**Method 1: [Create Label for New Shipment](#)Method 2: [Create Label for Existing Shipment](#)

#### Method 1: Create Label for New Shipment

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and open the record. The status of the order must be either “Pending” or “Processing.”
3. In the upper-right corner, tap **Ship**. Then, confirm the shipping information according to carrier requirements.
4. In the lower-right corner, mark the **Create Shipping Label** checkbox. Then, tap **Submit Shipment**, and do the following:
  - a. To add products from the order to the package, tap **Add Products**. The Quantity column shows the maximum number of products that are available for the package.
  - b. Mark the checkbox of each product to be added to the package, and enter the **Quantity** of each. Then, tap **Add Selected Product(s) to Package**.
    - To add a new package, tap **Add Package**.
    - To delete a package, tap **Delete Package**.

If you use a package type other than the default, or require a signature, the cost of shipping might differ from what you have charged the customer. Any difference in the cost of shipping is not reflected in your store.

5. When complete, tap **OK**.

If you need to cancel an order, tap **Cancel**. A shipping label will not be created, and the Create Shipping Label checkbox is cleared.

Magento connects to the shipping carrier system, submits the order, and receives a shipping label and tracking number for each package.

- If the label is successfully created, the shipment is submitted, the tracking number appears in the form, and the label is ready to print.
- If the carrier cannot create the label due to the problems with connection, or for any other reason, the shipment is not processed.

## Method 2: Create Label for Existing Shipment

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and open the Shipping form. Then, do the following:
  - a. In the Shipping and Tracking Information section, tap **Create Shipping Label**.
  - b. Distribute the ordered product(s) to the appropriate package(s), and tap **OK**.
  - c. To review the package information, tap **Show Packages**.

Magento connects to the shipping carrier system, submits an order, and receives a shipping label and a tracking number.

If a shipping label for this shipment already exists in the system, it is replaced with a new one. However, existing tracking numbers are not replaced. Any new tracking number is added to the existing one.

## Step 4: Print the Labels

Shipping labels are generated in PDF format, and can be printed from the Admin. Each label includes the order number and package number.

Because an individual shipment order for each package is created, multiple shipping labels might be received for a single shipment.

### Process Overview:

Method 1: [Print Label from Shipment Form](#)

Method 2: [Print Labels for Multiple Orders](#)

### Method 1: Print Label from Shipment Form

1. On the Admin sidebar, tap **Sales**. Then, do one of the following:
  - Choose **Orders**. Find the order in the grid, and open the record. In the panel on the left, choose **Shipments**. Then, open the shipment record.
  - Choose **Shipments**. Find the order in the grid, and open the record.
2. To download the PDF file, go to the Shipping and Tracking section of the form, and tap **Print Shipping Label**. Depending on your browser settings, the shipping labels can be viewed and printed directly from the PDF file.

The Print Shipping Label button appears only after the carrier generates labels for the shipment. If the button is missing, click **Create Shipping Label**. The button appears after Magento receives the label from the carrier.

### Method 2: Print Labels for Multiple Orders

1. On the Admin sidebar, tap **Sales**. Then, choose one of the following:
  - Orders
  - Shipments
2. In the grid, mark the checkbox of each order with shipping labels to be printed.
3. Set the **Actions** control to "Print Shipping Labels."
4. Tap **Submit**.

A complete set of shipping labels is printed for each shipment that is related to the selected orders.

### Required Carrier Configuration Settings

SETTING	DESCRIPTION
Type	Package types differ by carrier and method. The default package type for each carrier is initially selected. USPS does not require the package type for domestic shipments.
Customs Value	(International shipments only) The declared value or sales price of the contents of an international shipment.
Total Weight	The total weight of all products added to the package is calculated automatically. The value can also be changed manually, and entered as pounds or kilograms.
Length, Width, Height	(Optional) The package dimensions are used for custom packages only. You can specify the measurements units as inches or centimeters.



**Required Carrier Configuration Settings (cont.)**

SETTING	DESCRIPTION
Not Required	No confirmation of delivery is sent to the store by the shipping carrier.
No Signature	A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.
Signature Required	The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.
Direct	(FedEx Only) FedEx obtains a signature from someone at the delivery address. If no one is available to sign for the package, the carrier tries to deliver the package at another time.
Indirect	(FedEx Residential Deliveries Only) FedEx obtains the signature of someone, possibly a neighbor or building manager, at the delivery address. The recipient can leave a signed FedEx door tag to authorize the package to be left without anyone present to sign for it.
Contents	(USPS Only) Select one of the following descriptions of the package: Gift Documents Commercial Sample Returned Goods Merchandise Other
Explanation	(USPS Only) A detailed description of the package contents.
Adult Required	The shipping carrier obtains the signature of an adult recipient and provides the store with a printed copy.

## Label Packages

The Create Packages window appears when you choose to create a shipping label. You can start configuring the first package immediately.

### To configure a package:

1. Complete the fields as described below.

If you select the non-default value in the Type field or choose to require a signature confirmation, the price of a shipment may differ from the one you charged to the customer.

2. To view a list of shipped products and add them to the package, tap **Add Products**.

The Qty column shows the maximum quantity that is available to add. For the first package, the number is the total quantity of the product to be shipped.

3. Specify the products and quantities. To add the products to the package, tap **Add Selected Product(s) to Package**.

- To add a new package, tap **Add Package**. You can add several packages, and edit them at the same time.
- To delete a package, tap **Delete Package**.

After products are added to the package, the quantity cannot be edited directly.

### To increase the quantity:

1. Tap **Add Selection**.
2. Enter the additional quantity.

The number is added to the previous quantity of the product in the package.

**To decrease the quantity:**

1. Delete the product from the package.
2. Tap **Add Selection**.
3. Enter the new, smaller value.

After you distribute all products, the total number of the packages you are going to use equals the number of the last package in the list. The OK button is disabled until all shipped items are distributed to packages, and all necessary information is complete.

4. When complete, tap **OK** to generate the labels.

If you need to stop the process, tap **Cancel**. The packages are not saved, and the shipping label process is canceled.

## Field Descriptions

FIELD	DESCRIPTION
Type	<p>Specifies the type of a package. Select one of the predefined values. Available package types are different for each shipping carrier.</p> <p>When the Create Packages pop-up window opens, the default package for the shipping carrier appears in the Type field. If you select a package that is not designed by a shipping carrier, you must enter the dimensions of the package.</p> <p>For shipping labels created for DHL, FedEx, and UPS shipments, the “Type of Goods” field is set to “Merchandise.” For USPS, the Type field reflects the value from the Contents field in the Create Packages window.</p>
Total Weight	<p>The total weight of a package. The field is pre-populated with the total weight of products in a package. The unit of measurement can be set to either pounds or kilograms.</p>
Length	<p>The length of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The unit of measurement can be set to either inches or centimeters.</p>

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Width	The width of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.
Height	The height of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.
Signature	<p>Confirmation Defines delivery confirmation. Options:</p> <p>Not Required      No delivery confirmation letter is sent to you.</p> <p>No Signature      A delivery confirmation letter without a recipient's signature is sent to you.</p> <p>Signature Required      The shipping carrier obtains the recipient's signature and provides you with its printed copy.</p> <p>Adult Required      The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.</p> <p>Direct (FedEx only)      FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.</p> <p>Indirect (FedEx only)      FedEx obtains a signature in one of three ways: (1) from someone at the delivery address; (2) from a neighbor, building manager or other person at a neighboring address; or (3) the recipient can leave a signed FedEx Door Tag authorizing release of the package without anyone present. Available for residential deliveries only.</p> <p>The options may vary slightly for different shipping methods. For the most up to date information refer to shipping carrier's resources.</p>

**Field Descriptions (cont.)**

FIELD	DESCRIPTION
Contents	(Available for USPS shipments only) Description of the package contents. Options: Gift Documents Commercial Sample Returned Goods Merchandise Other
Explanation	(USPS shipments only) Detailed description of the package content.

# REPORTS

## Contents

In this section of the guide, you will learn how to filter data and online generate reports. The report data can be opened in a spreadsheet or imported into other applications.

Reports Menu

Statistics

Marketing

Reviews

Sales

Customers

Products

New Relic Reporting

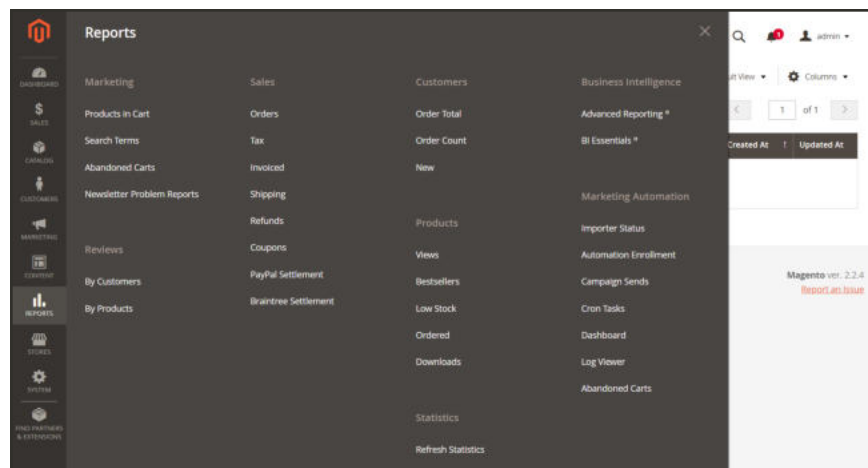
New Relic Queries



## CHAPTER 71:

# Reports Menu

Magento Open Source provides a wide selection of reports to keep you informed on your marketing efforts, sales products, and customer activity. The Reports menu provides easy access to current information about your sales, products, customers, and promotions.



*Reports Menu*

### To display the Reports menu:

On the Admin sidebar, tap **Reports**.

## Menu Options

### Marketing

---

A selection of marketing reports, including Products in Cart, Search Terms, Abandoned Carts, and Newsletter Problem Reports.

### Reviews

---

The selection of product review reports includes By Customer and By Product.

### Sales

---

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and settlement reports for PayPal and Braintree.

### Customers

---

The selection of customer reports includes Order Total, Order Account, and New.

### Products

---

The selection of product reports includes Views, Bestsellers, Low Stock, Ordered, and Downloads.

### Statistics

---

Statistics is a tool that reduces the performance impact of generating reports by calculating and storing statistical data. Rather than recalculate the statistics every time a report is generated, the stored statistics are used until you refresh the statistics.

### Business Intelligence

---

The **Advanced Reporting** dashboard gives you valuable insight with a dynamic set of product, order, and customer reports, powered by Magento Business Intelligence. For more sophisticated reporting and analysis, sign up for a free trial of **BI-Essentials**.

## Refresh Statistics

To reduce the performance impact of generating sales reports, Magento calculates and stores the required statistics for each report. Rather than recalculate the statistics every time a report is generated, the stored statistics are used, unless you refresh the statistics. To include the most recent data, the report statistics must be refreshed before a sales report is generated.

Refresh Statistics

Refresh Statistics for the Last Day  8 records found

<input type="checkbox"/>	Report	Description	Updated
<input type="checkbox"/>	Orders	Total Ordered Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/>	Tax	Order Taxes Report Grouped by Tax Rates	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/>	Shipping	Total Shipped Report	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/>	Total Invoiced	Total Invoiced VS Paid Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/>	Total Refunded	Total Refunded Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/>	Coupons	Promotion Coupons Usage Report	undefined
<input type="checkbox"/>	Bestsellers	Products Bestsellers Report	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/>	Most Viewed	Most Viewed Products Report	undefined

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[Report Bugs](#)

### *Refresh Statistics*

#### To refresh report statistics:

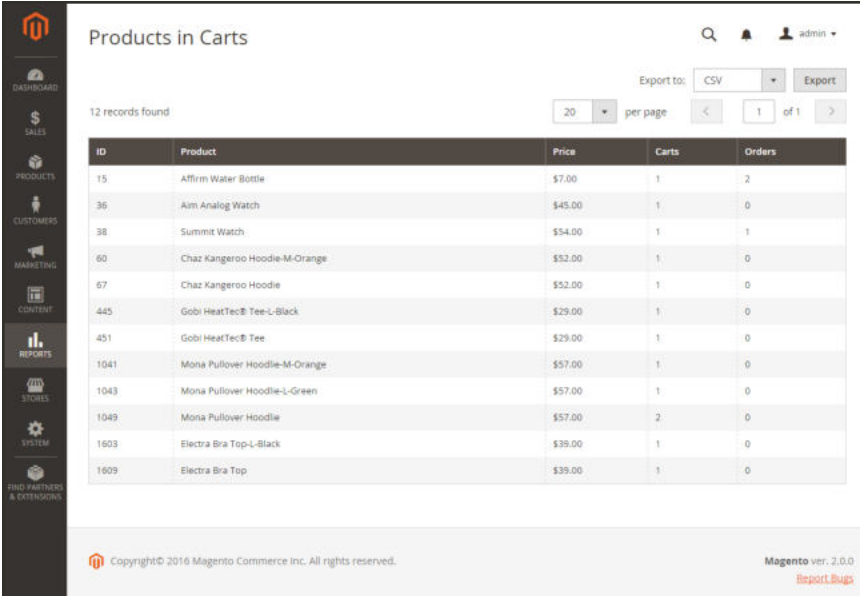
1. On the Admin sidebar, tap **Reports**. Then under Statistics, choose **Refresh Statistics**.
2. In the list, mark the checkbox of each report to be refreshed.
3. Set the **Actions** control to one of the following:
  - Refresh Lifetime Statistics
  - Refresh Statistics for the Last Day
4. When complete, tap .



## CHAPTER 72:

# Marketing Reports

Marketing reports provide information about the status of shopping carts, the use of search terms, and newsletter transmissions.



Products in Carts

Export to:

12 records found

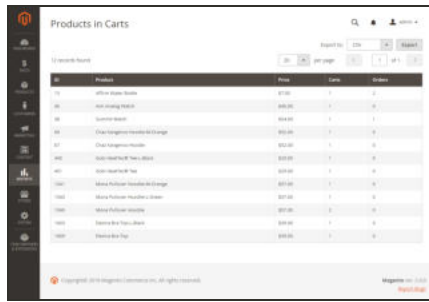
20 per page < 1 of 1 >

ID	Product	Price	Carts	Orders
15	Affirm Water Bottle	\$7.00	1	2
36	Aim Analog Watch	\$45.00	1	0
38	Summit Watch	\$54.00	1	1
60	Chaz Kangaroo Hoodie-M-Orange	\$52.00	1	0
67	Chaz Kangaroo Hoodie	\$52.00	1	0
445	Gobi HeatTec® Tee-L-Black	\$29.00	1	0
451	Gobi HeatTec® Tee	\$29.00	1	0
1041	Mona Pullover Hoodie-M-Orange	\$57.00	1	0
1043	Mona Pullover Hoodie-L-Green	\$57.00	1	0
1049	Mona Pullover Hoodie	\$57.00	2	0
1603	Electra Bra Top-L-Black	\$39.00	1	0
1609	Electra Bra Top	\$39.00	1	0

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[Report Bugs](#)

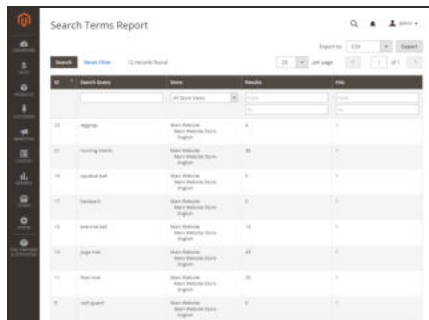
*Products in Cart Report*

# Reports



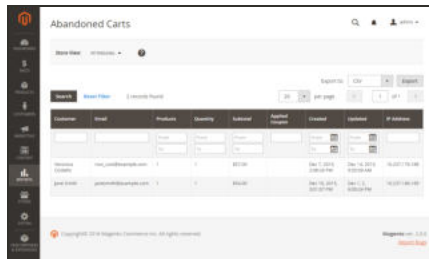
## Products in Cart

The Products in Cart Report lists all products currently in shopping carts, and includes the name and price of each item, the number of carts with the item, and the number of times each item has been ordered.



## Search Terms

The Search Terms Report shows what your customers are looking for in each store view. The report includes the number of matching items found in the catalog, and how many times the search term has been used.



## Abandoned Carts

The Abandoned Carts Report lists all registered customers who have abandoned carts that have not yet expired. The report includes the customer name and email address, the number of products in the cart and subtotal, the date created, and date last updated.



## Newsletter Problems

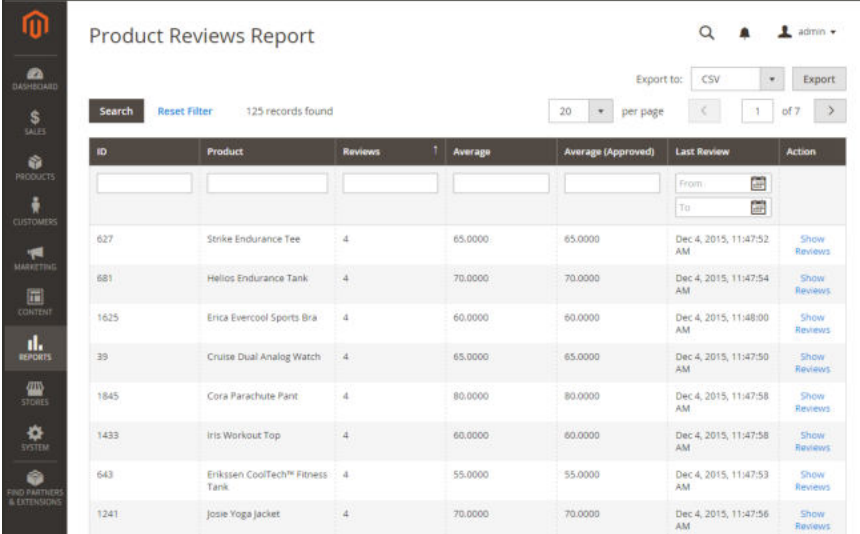
The Newsletter Problems Report includes information about any newsletter queue that failed to transmit successfully. The report includes the name of each subscriber, and queue date and subject, the information about the error.

## CHAPTER 73:

# Review Reports

The Review Reports provide information about product reviews by customer and by product.

- By Customers
- By Products



Product Reviews Report

Export to: CSV Export

Search Reset Filter 125 records found 20 per page 1 of 7

ID	Product	Reviews	Average	Average (Approved)	Last Review	Action
627	Strike Endurance Tee	4	65.0000	65.0000	Dec 4, 2015, 11:47:52 AM	Show Reviews
681	Helios Endurance Tank	4	70.0000	70.0000	Dec 4, 2015, 11:47:54 AM	Show Reviews
1625	Erica Evercool Sports Bra	4	60.0000	60.0000	Dec 4, 2015, 11:48:00 AM	Show Reviews
39	Cruise Dual Analog Watch	4	65.0000	65.0000	Dec 4, 2015, 11:47:50 AM	Show Reviews
1845	Cora Parachute Pant	4	80.0000	80.0000	Dec 4, 2015, 11:47:58 AM	Show Reviews
1433	Iris Workout Top	4	60.0000	60.0000	Dec 4, 2015, 11:47:58 AM	Show Reviews
643	Eriksen CoolTech™ Fitness Tank	4	55.0000	55.0000	Dec 4, 2015, 11:47:53 AM	Show Reviews
1241	Jose Yoga Jacket	4	70.0000	70.0000	Dec 4, 2015, 11:47:56 AM	Show Reviews

*Review Report by Product*

# Reports

## By Customers

The Customer Reviews Report lists all customer who have submitted product reviews. The report includes the number of reviews submitted by each customer, and a link to the list of reviews.

Product	Reviews	Average Rating	Last Reviewed	Link
427	1	5.0000	Dec 4, 2015 11:47:56 AM	<a href="#">View Reviews</a>
480	1	5.0000	Dec 4, 2015 11:47:56 AM	<a href="#">View Reviews</a>
428	1	5.0000	Dec 4, 2015 11:48:00 AM	<a href="#">View Reviews</a>
43	1	5.0000	Dec 4, 2015 11:47:56 AM	<a href="#">View Reviews</a>
1067	1	5.0000	Dec 4, 2015 11:47:56 AM	<a href="#">View Reviews</a>
1433	1	5.0000	Dec 4, 2015 11:47:56 AM	<a href="#">View Reviews</a>
481	1	5.0000	Dec 4, 2015 11:47:56 AM	<a href="#">View Reviews</a>
1067	1	5.0000	Dec 4, 2015 11:47:56 AM	<a href="#">View Reviews</a>

## By Products

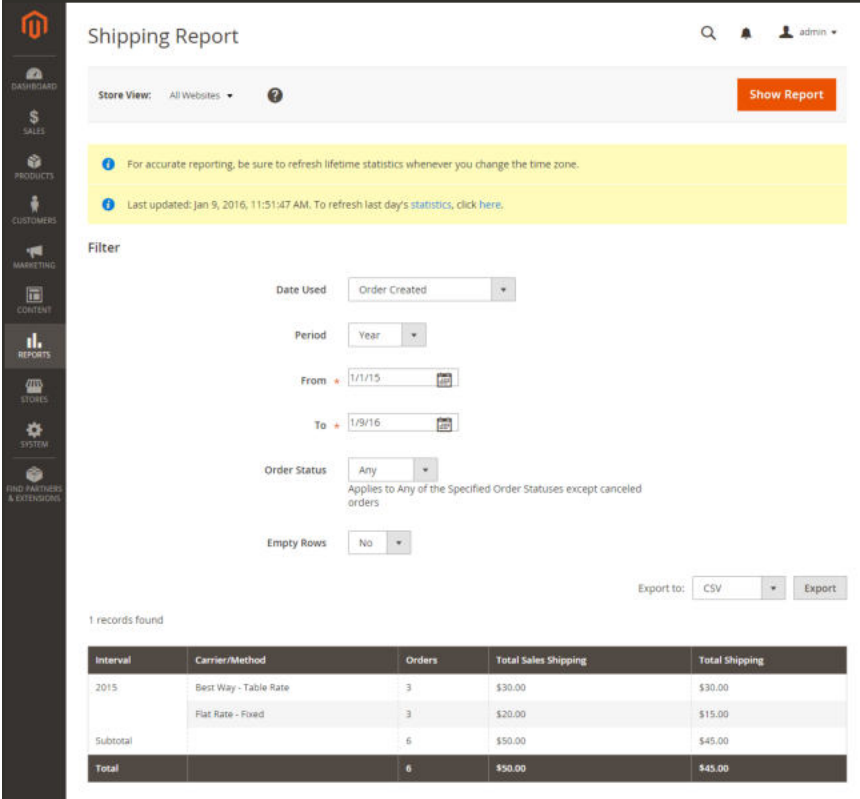
The Product Reviews Report lists all products that have been reviewed by customers. The report includes the number of reviews and average rating, the product was last reviewed, and a link to the list of reviews for each product.



## CHAPTER 74:

# Sales Reports

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.



Shipping Report

Store View: All Websites ? Show Report

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.

Last updated: Jan 9, 2016, 11:51:47 AM. To refresh last day's statistics, click here.

Filter

Date Used: Order Created

Period: Year

From: 1/1/15

To: 1/9/16

Order Status: Any  
Applies to Any of the Specified Order Statuses except canceled orders

Empty Rows: No

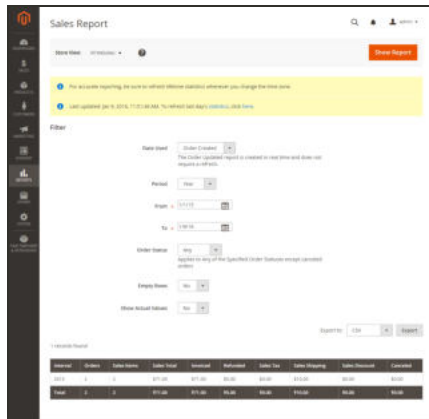
Export to: CSV Export

1 records found

Interval	Carrier/Method	Orders	Total Sales Shipping	Total Shipping
2015	Best Way - Table Rate	3	\$30.00	\$30.00
	Flat Rate - Fixed	3	\$20.00	\$15.00
Subtotal		6	\$50.00	\$45.00
Total		6	\$50.00	\$45.00

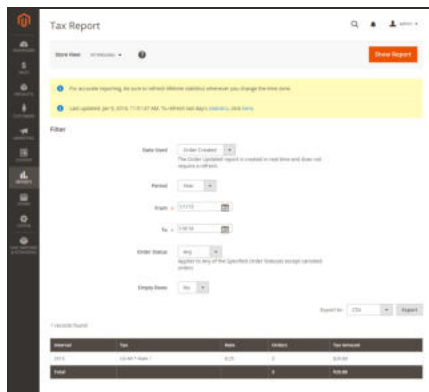
*Shipping Report*

# Reports



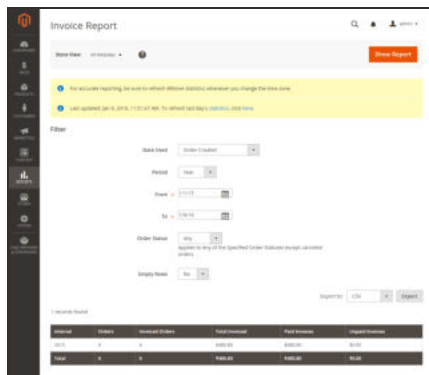
## Orders

The Orders Report can be filtered by time interval, date and status. The report includes the number of orders placed and canceled, with totals for sales, amounts invoiced, refunded, tax collected, shipping charged, and discounts.



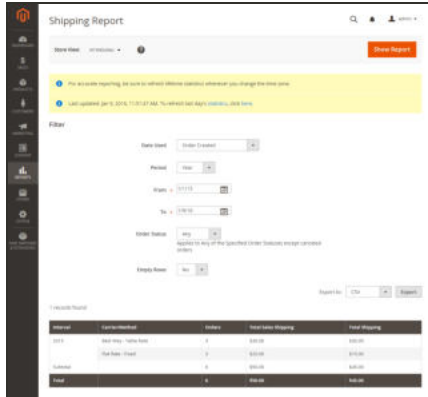
## Tax

The Tax Report can be filtered by time interval, date, and status. The report includes the tax rule applied, tax rate, number of orders, and amount of tax charged.



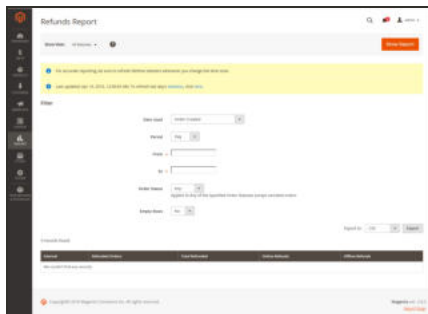
## Invoiced

The Invoice Report can be filtered by time interval, date, and status. The report includes the number of orders and invoices during the time period, with amounts invoiced, paid, and unpaid.



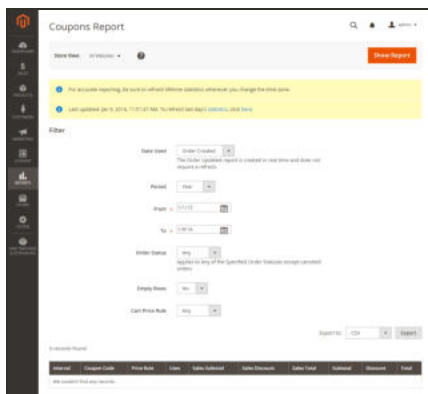
## Shipping

The Shipping Report can be filtered by time interval, date, and status. The report includes the number of orders for carrier or shipping method used, with amounts for total sales shipping and total shipping.



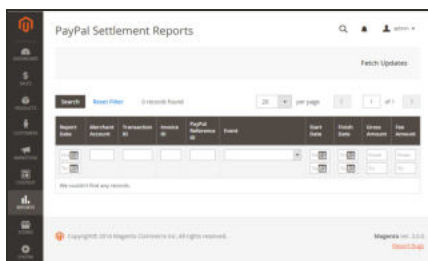
## Refunds

The Refunds Report can be filtered by time interval, date, and status. The report includes the number of refunded orders, and total amount refunded online and offline.



## Coupons

The Coupons Report can be filtered by time interval, date, and status. The report includes each coupon code used during the specified time interval, related price rule, and number of times used with totals and subtotals for sales and discounts.



## PayPal Settlement

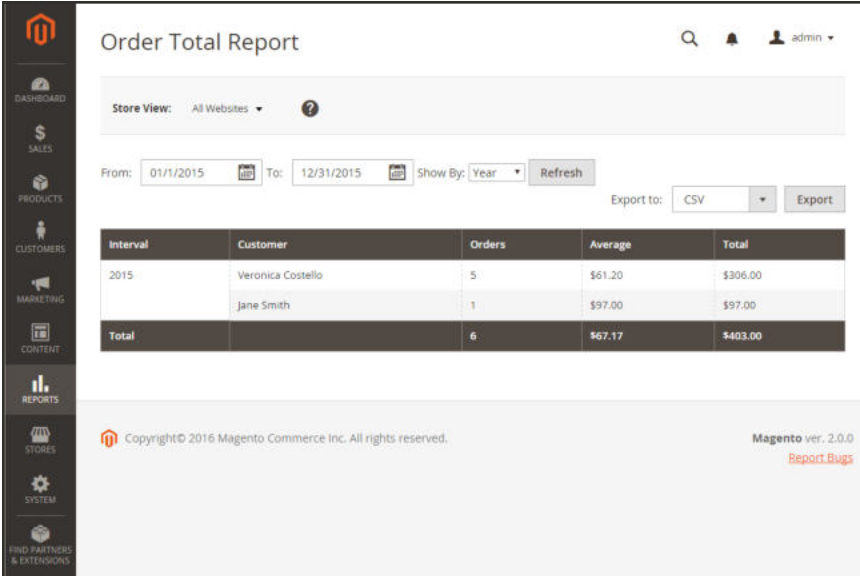
The PayPal Settlement Report can be filtered by date, merchant account, transaction ID, invoice ID, or PayPal reference ID. The report includes the type of event, such as a debit card transaction, the start and finish dates, gross amount, and related fees. The report can be automatically updated with the most current data from PayPal.



## CHAPTER 75:

# Customer Reports

Customer reports provide insight into customer activity during a specified period of time or date range.



Interval	Customer	Orders	Average	Total
2015	Veronica Costello	5	\$61.20	\$306.00
	Jane Smith	1	\$97.00	\$97.00
<b>Total</b>		<b>6</b>	<b>\$67.17</b>	<b>\$403.00</b>

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[Report Bugs](#)

*Order Total Report*

# Reports

Interval	Customer	Orders	Average	Total
2015	Veronica Collins	0	\$0.00	\$200.00
	John Smith	1	\$217.00	\$217.00
<b>Total</b>		<b>1</b>	<b>\$217.00</b>	<b>\$417.00</b>

## Order Total

The Order Total Report shows customer orders for a specified time interval or date range. The report includes the number of orders per customer, average order amount, and total amount.

Interval	Customer	Orders	Average	Total
2015	Veronica Collins	0	\$0.00	\$200.00
	John Smith	1	\$217.00	\$217.00
<b>Total</b>		<b>1</b>	<b>\$217.00</b>	<b>\$417.00</b>

## Order Count

The Order Count Report shows the number of orders per customer for a specified time interval or date range. The report includes the number of orders per customer, average order amount, and total amount.

Interval	New Accounts
2015	0
2016	No data found records for this period.
<b>Total</b>	<b>0</b>

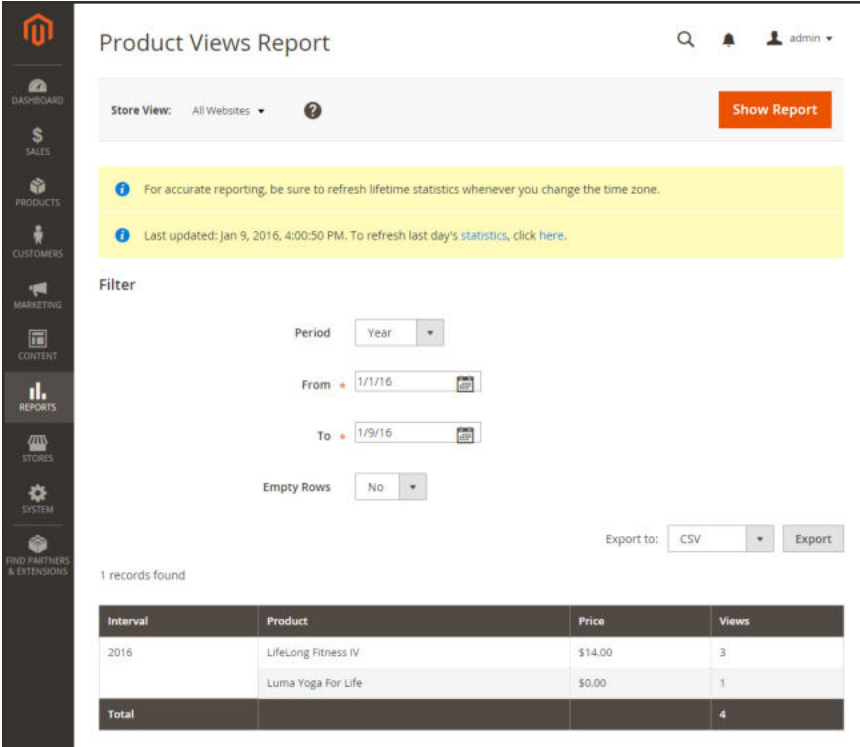
## New Accounts

The New Accounts Report shows the number of new customer accounts opened during a specified time interval or date range.

## CHAPTER 76:

# Product Reports

The product reports give you insight regarding products viewed and ordered, bestsellers, stock levels, and downloads.



Product Views Report

Store View: All Websites Show Report

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.

Last updated: Jan 9, 2016, 4:00:50 PM. To refresh last day's statistics, click here.

Filter

Period: Year

From: 1/1/16

To: 1/9/16

Empty Rows: No

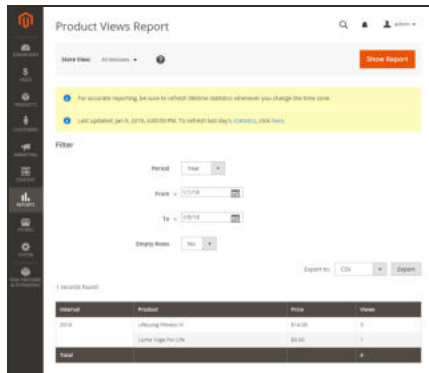
Export to: CSV Export

1 records found

Interval	Product	Price	Views
.2016	LifeLong Fitness IV	\$14.00	3
	Luma Yoga For Life	\$0.00	1
<b>Total</b>			<b>4</b>

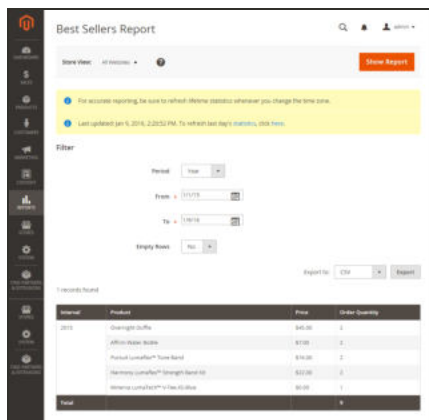
*Product Views Report*

# Reports



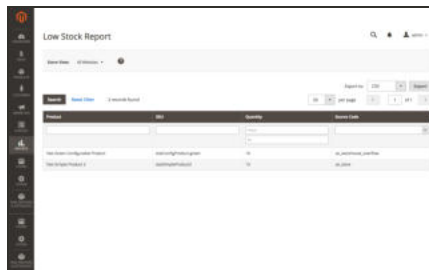
## Product Views

The Product Views Report shows the products that have been viewed during a time interval or range of dates. The report includes the product name, price, and number of views.



## Bestsellers

The Bestsellers Report shows the five top-selling five during an interval of time or date range. The report includes the product name, price, and quantity ordered.



## Low Stock

The Low Stock Report lists all products with stock levels within a specified range. With Inventory Management enabled, the report includes low stock inventory amounts per source with the listed source code.



Product	Ordered Quantity
Office Paper Staples	1
Memory Card/USB Storage Device	1
Personal Laminator	1
Clearlight Stuffs	1
Summer Report	1
Employee Photo Book	1
Inkjet Printer	1
Shop Booking Book	1
Personal Laminator	1
Laminating Sheet	1
<b>Total</b>	<b>14</b>

## Ordered Products

The Ordered Products Report lists all products ordered for a specified time interval or date range. The report includes the product name and quantity ordered.

Product	Link	PID	Purchases	Downloads
We couldn't find any records.				

## Downloads

The Downloads Report lists all downloads during the specified time interval or date range. The report includes the product name, download link, and SKU, with the number of purchases and downloads.

# Business Intelligence

## Contents

Magento advanced reporting and business intelligence tools give you the insight you need to make sound business decisions. Analyze your top-performing customers, products, and promotions to find new opportunities for growth. Then, share the insights across your organization with just a few clicks.

[Advanced Reporting](#)

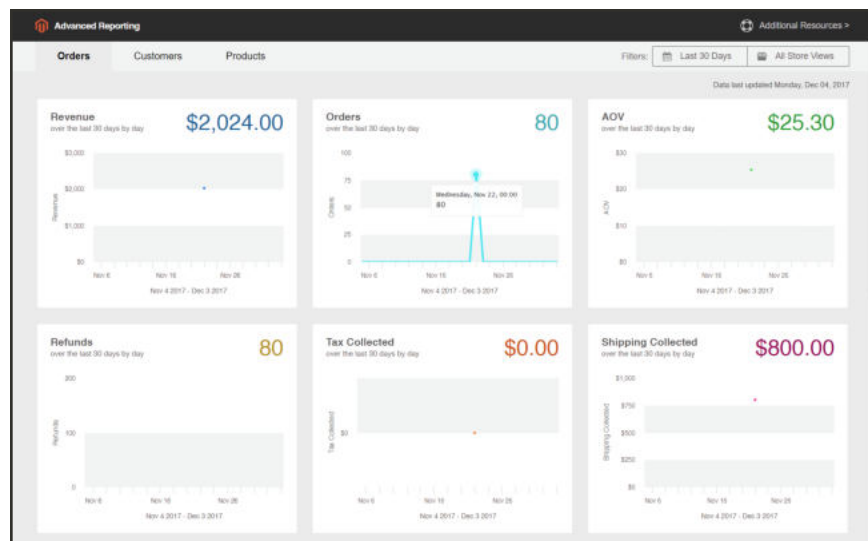
[Magento BI Essentials](#)

[New Relic Reporting](#)

## CHAPTER 77: **Advanced Reporting**

Advanced Reporting gives you access to a suite of dynamic reports that are based on your product, order, and customer data, with a personalized dashboard that is tailored to your business needs. Advanced Reporting is a free, cloud-based service that is powered by [Magento Business Intelligence](#).

For technical information, see [Advanced Reporting](#) in our developer documentation.



*Advanced Reporting Dashboard*

### Requirements

- The website must run on a public web server.
- The domain must have a valid security (SSL) certificate.
- Magento must have been installed or upgraded successfully without error.
- In the Magento configuration, the **Base URL (Secure)** setting for the store view must point to the secure URL. For example <https://yourdomain.com>

- In the Magento configuration, **Use Secure URLs on Storefront**, and **Use Secure URLs in Admin** must be set to “Yes.”
- Make sure that **Magento crontab** is created and cron jobs are running on the installed server.

The initial release of Advanced Reporting supports only one base currency.

## Step 1: Enable Advanced Reporting

In the Magento configuration, **Advanced Reporting** is enabled by default, and starts automatically if cron is **configured** and running. An attempt to establish the subscription is initiated at the beginning of each hour over the next 24-hours until successful. The subscription status is “pending” until the subscription is successfully established.

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, choose **General**. Then under **Advanced Reporting**, do the following:
  - a. Verify that **Advanced Reporting Service** is set to “Enable.” (This is the default setting.)
  - b. Set the **Time of day to send data** to the hour, minute, and second, according to a 24-hour clock, that you want the service to receive updated data from your store. By default, data is sent at 2:00 AM.
  - c. Under **Industry Data**, choose the **Industry** that best describes your business.

**Advanced Reporting**

This service provides a dynamic suite of reports with rich insights about your business. Your reports can be accessed securely on a personalized dashboard outside of the admin panel by clicking on the "Go to Advanced Reporting" link. For more information, see our [terms and conditions](#).

**Advanced Reporting Service** [global] Enable   
Subscription status: Pending

**Time of day to send data** [global] 02  : 00  : 00   
Pacific Standard Time (America/Los\_Angeles)

**Industry Data**

In order to personalize your Advanced Reporting experience, please select your industry.

**Industry** [website] --Please Select--

**Get more insights from Magento Business Intelligence**  
Magento Business Intelligence provides you with a simple and clear path to becoming more data driven. Learn more about [Magento BI Essentials](#) and [BI Pro](#) tiers.

### *Advanced Reporting*

3. When complete, tap **Save Config**.
4. When prompted, click the **Cache Management** in the message at the top of the page. Then, refresh any invalid caches.

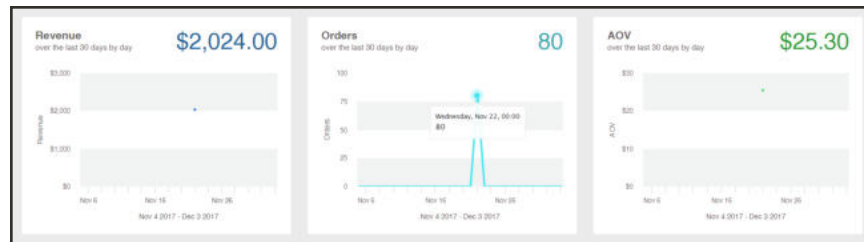
5. Wait overnight, or until after the time of your next scheduled update. Then, check the status of your subscription. If the status is still “pending,” make sure that your installation meets all of the requirements.

## Step 2: Access Advanced Reporting

1. Do one of the following:
  - In the Admin sidebar, choose **Dashboard**. Then, tap **Advanced Reporting**.
  - On the Admin sidebar, choose **Reports**. Then under **Business Intelligence**, choose **Advanced Reporting**.

The Advanced Reporting dashboard provides a quick summary of your orders, customers, and products. Make sure to scroll down to see the full dashboard.

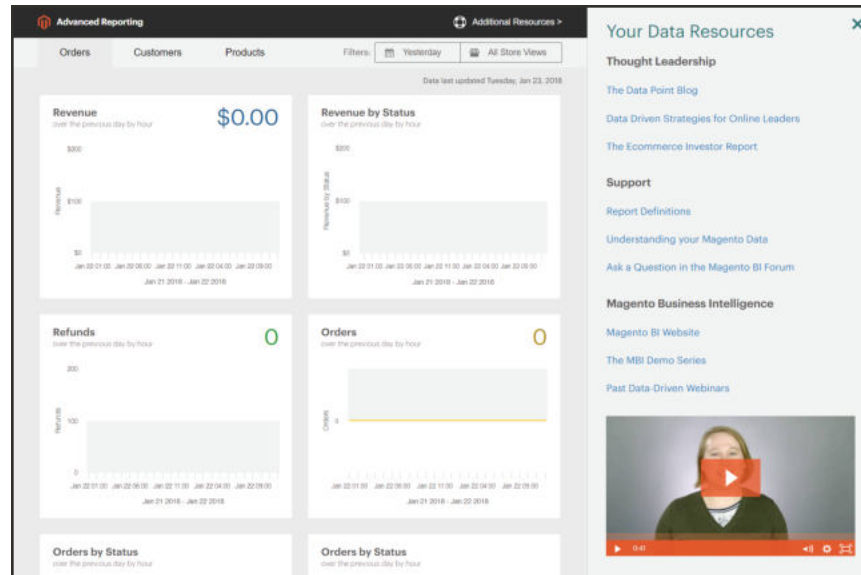
2. To get a better view of the data, set the **Filters** in the upper-right corner to the time period and store view that you want to include in the report. Then, do the following:
  - Hover over any data point for more information.
  - Click each tab to see all dashboard reports.



*Data Point*

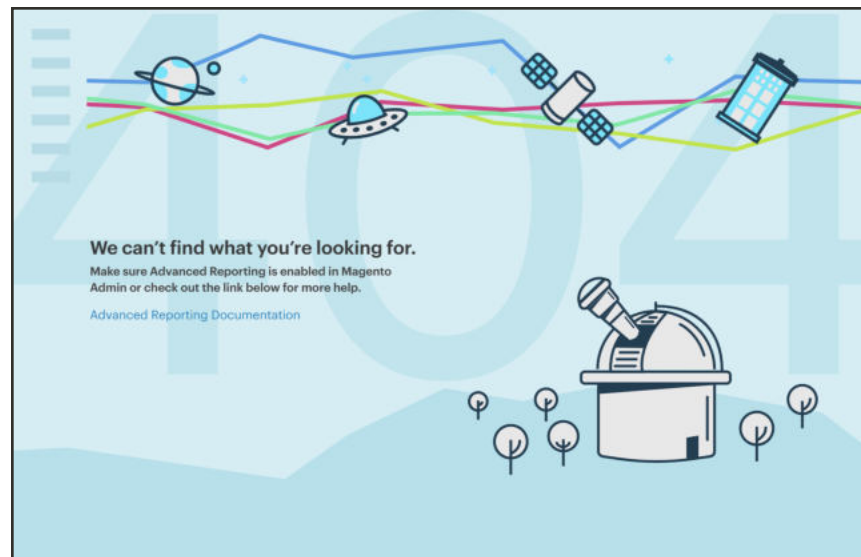
## To access your data resources:

1. In the upper-right corner of the Advanced Reporting dashboard, click **Additional Resources**.



## Troubleshooting

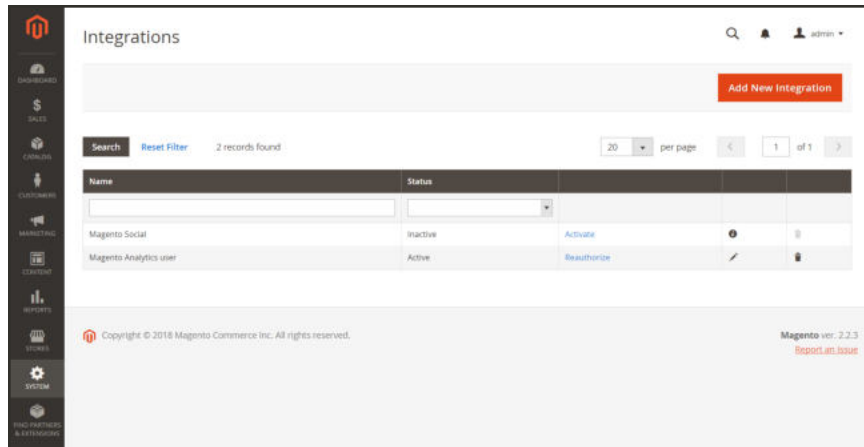
If you get a 404 “Page Not Found” message, verify that your store meets the requirements for Advanced Reporting. Then, follow the instructions to verify that the integration is installed.



*Advanced Reporting Not Available*

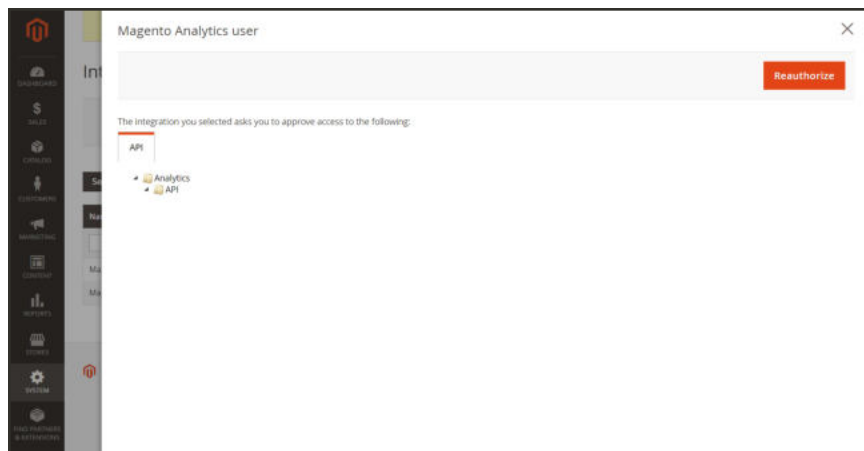
### Verify that the Integration is Active

1. On the Admin menu, choose **System**. Then under **Extensions**, choose **Integration**.
2. Verify that the **Magento Analytics user** integration appears in the list, and that the **Status** is “Active.”
3. To reestablish the user, click **Reauthorize**. Then, do the following:



*Reauthorize*

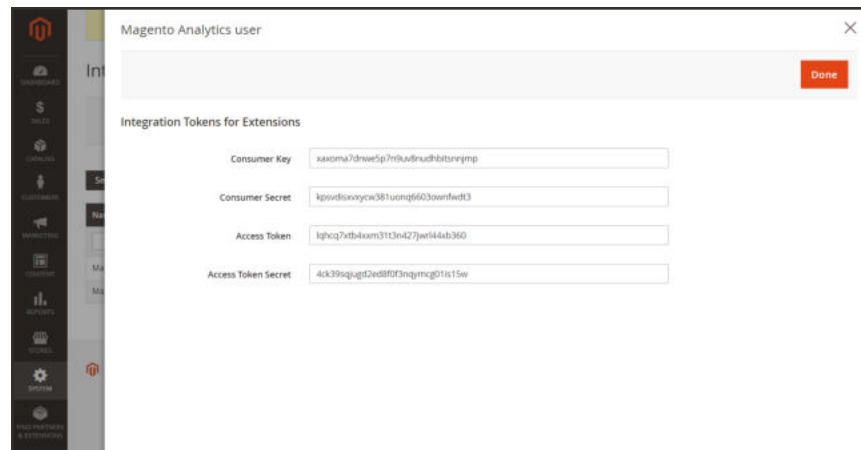
- a. When prompted, tap **Reauthorize** to approve access to the API resources.



*Reauthorize Access to API Resources*

- b. Verify that the list of Integration Tokens for Extensions is complete. Then, tap **Done**.





*Integration Tokens*

4. Look for the message that indicates the integration “Magento Analytics user” has been reauthorized.
5. Wait overnight, or until after the time of your next scheduled update.

## Dashboard Reports

FIELD	DESCRIPTION
<b>ORDERS</b>	
Revenue	Shows all revenue received by the store view during the defined time period.
Orders	Shows all orders placed through the store view during the defined time period.
AOV	Shows the average order value placed through the store view during the defined time period.
Refunds	Shows all refunds processed through the store view during the defined time period.
Tax Collected	Shows all tax collected through the store view during the defined time period.
Shipping Collected	Shows all shipping fees collected through the store view during the defined time period.
Orders by Status	Shows the number of orders by status, for the store view during the defined time period.
Orders by Status	Lists a summary of the number of orders by status.

**Dashboard Reports (cont.)**

<b>FIELD</b>	<b>DESCRIPTION</b>
Coupon Usage	Lists all coupon codes and the number of users for each, redeemed through the store view during the defined time period.
Orders and Revenue by Billing Region	Lists the number of orders and revenue by region for the store view during the defined time period.
Tax Collected by Billing Region	Lists the amount of tax collected by region for the store view during the defined time period.
Shipping Fees Collected by Shipping Region	Lists the shipping fees collected by region for the store view during the defined time period.
<b>CUSTOMERS</b>	
Unique Customers	Shows the number of unique customer accounts associated with the store view during the defined time period.
New Registered Accounts	Shows the number of new customer accounts registered with the store view during the defined time period.
Top Coupon Users	Lists the top coupon users by Customer ID, and the number of orders placed with coupons for the store view during the defined time period.
Customer KPI Table	Lists the number of orders, revenue, and average order value by Customer ID for the store view during the defined time period.
<b>PRODUCTS</b>	
Quantity of Products Sold	Shows the number of products sold through the store view during the defined time period.
Products Added to Wishlists	Lists all products added to wishlists through the store view during the defined time period.
Best Selling Products by Quantity	Lists the best-selling products and quantity sold through the store view during the defined time period.
Best Selling Products by Revenue	Lists the best-selling products and revenue generated by the sale of the product through the store view during the defined time period.





## CHAPTER 78:

# Magento BI Essentials

Magento Business Intelligence (Magento BI) is a cloud-based data management and analytics platform. Magento BI provides users with the ability to easily consolidate and manage their data sources, model their data, create charts and reports, and maintain a single source of truth.

When you activate a Magento BI Essentials account, you get access to five dashboards with approximately 100 reports. These reports are designed to provide insights around your data and answer questions like: “How are my orders growing month-over-month? Who are my most loyal customers? Is my coupon strategy working?”

As a Magento Commerce customer, you are entitled to a BI Essentials account at no additional cost:

If you do not have an active subscription and you are part of the Magento Community, you can sign up for a free seven-day trial. The price for continued access is based on your monthly gross merchandise (GMV) volume, and starts at \$100 per month.

The instructions in this section walk you through the activation, and introduce some basic features of Magento BI Essentials. For more detailed information, refer to the [Magento BI Help Center](#).

Get started with Magento Business Intelligence

Let's get you set up with a free 7-day trial. Pricing is monthly and base on your store's Gross Merchandise Volume (GMV).

Your GMV  
\$0-\$5m

**\$100**  
Per month.  
No contract necessary.

Join Now

## To sign up for a new Magento BI Essentials account:

1. On the Admin sidebar, choose **Reports**. Then under **Business Intelligence**, choose **BI Essentials**.
2. Choose the range of **Your Annual GMV**. Then, tap **Join Now**.
3. Complete the account creation form (if your email account is already associated with a Magento account, use the **Sign In** link to log in first). Then, tap **Continue**.

### Create a Magento Account

Already have a Magento Account? Please [Sign In](#)

First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Work Email *	
<input type="text"/>	
Country *	
<input type="text"/>	
Password *	
<input type="text"/>	
Re-enter Password *	
<input type="text"/>	
My Company Primarily *	My Role *
<input type="text" value="Select Option"/>	<input type="text" value="Select Option"/>
Company Name *	Phone Number *
<input type="text"/>	<input type="text"/>
Company Country *	
<input type="text" value="United States"/>	
<input type="checkbox"/> I agree that use of Magento's website is subject to the <a href="#">Magento Website Terms of Service</a> and <a href="#">Magento Privacy Policy</a> . I understand that I can withdraw this consent at any time by visiting our <a href="#">preference center</a> . *	

**Continue**

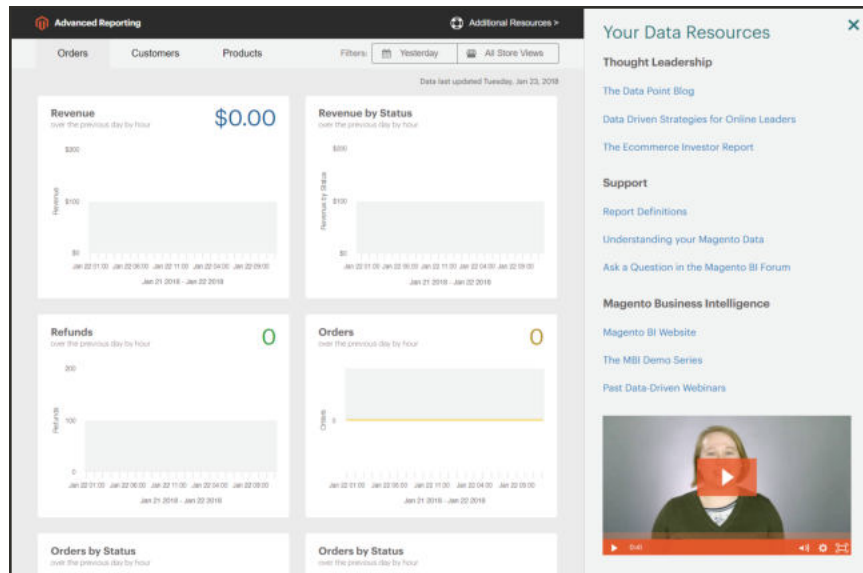
*Create Account*

4. Enter your credit card and billing information. Then, tap **Submit**.
5. Check your email for a Welcome message from the Magento BI Team, with your log-in credentials. To learn more, see the [Essentials Quick Start Video Series](#).

### To access Magento BI Essentials:

#### Method 1: From the Admin

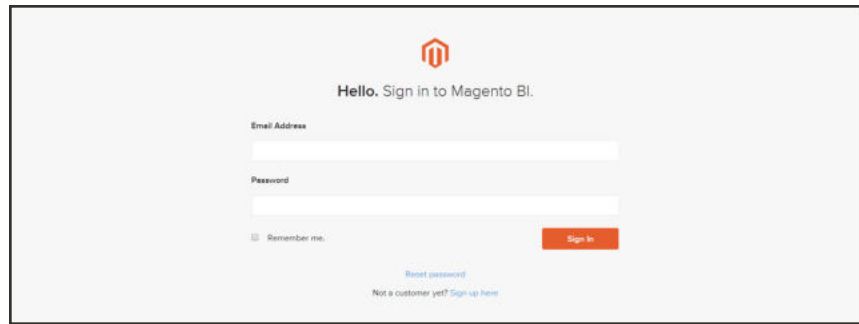
1. From the Dashboard of your store, tap **Go to Advanced Reporting**.
2. In the upper-right corner, click **Additional Resources**. Then under **Magento Business Intelligence**, choose **Magento BI Website**.



*Your Data Resources*

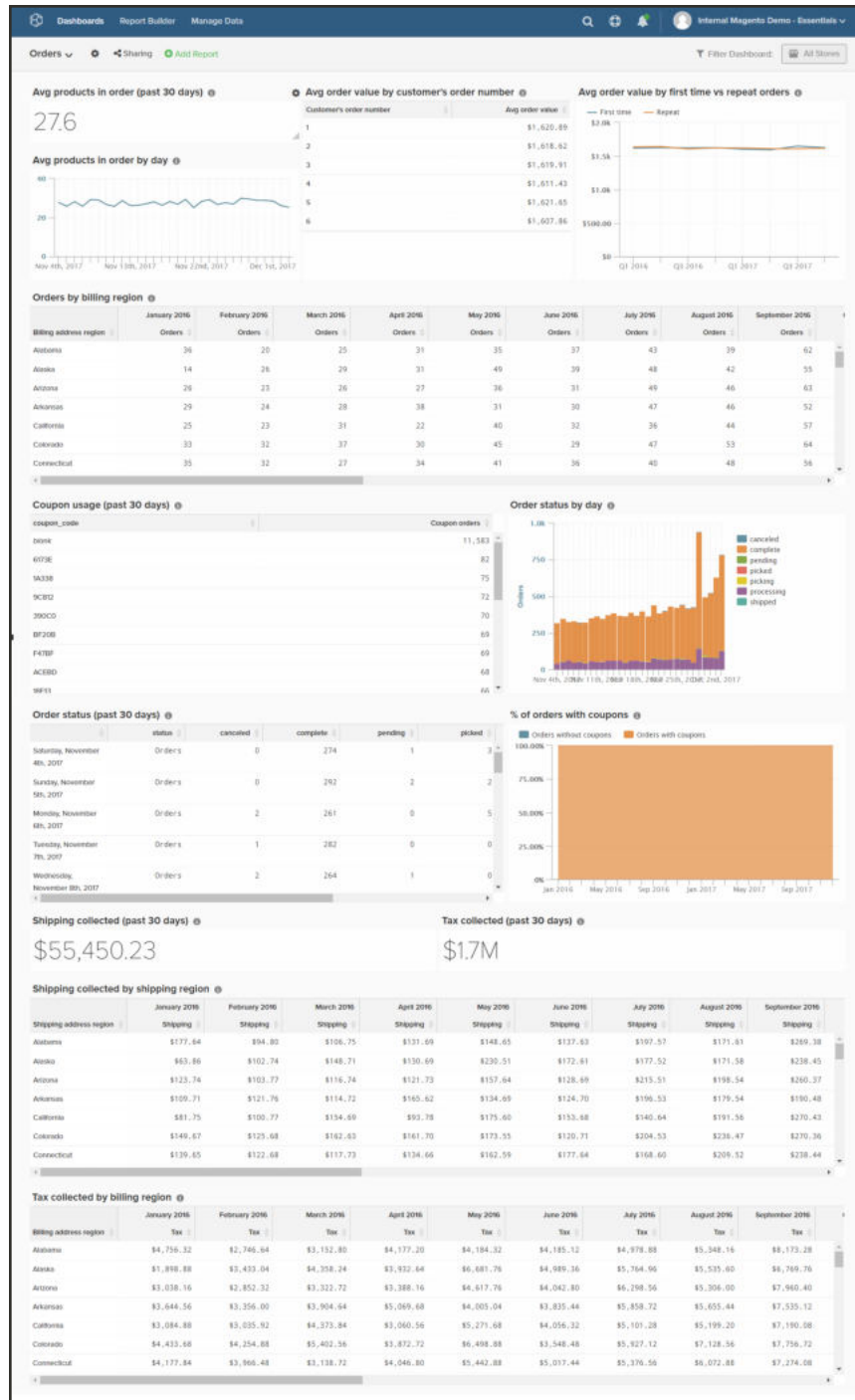
#### Method 2: From your browser

1. Go to the [Magento BI](#) website.
2. Enter your **Email Address** and **Password**. Then, tap **Sign In**.



*Sign In to Magento BI*

3. Your Magento BI dashboard appears.



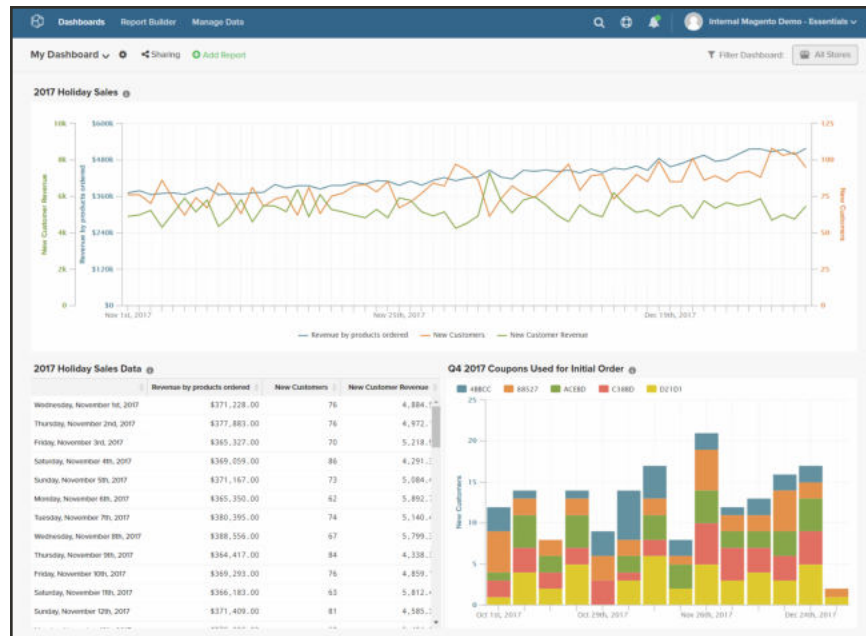
Magento BI Essentials Dashboard



# Dashboards


BI Dashboards give you a quick view of your store’s performance and sales activity at a glance. Individual dashboards can be shared with other users, and organized into logical groups. You can also set different levels of permission to others users.

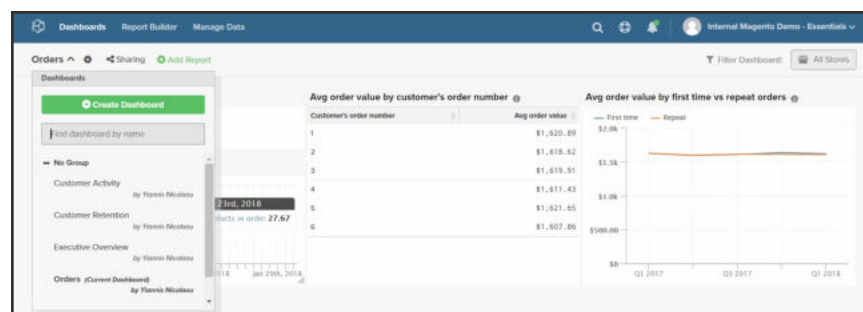
It’s easy to create a new report, add it to a dashboard, and export the data to Excel. Charts and reports can be resized and dragged into position on the dashboard.



Dashboard

## To create a new dashboard:

1. On the menu, choose **Dashboards**.
2. The name of the default dashboard appears in the upper-left corner of the dashboard header. Click the down arrow (  ) to show the available options.



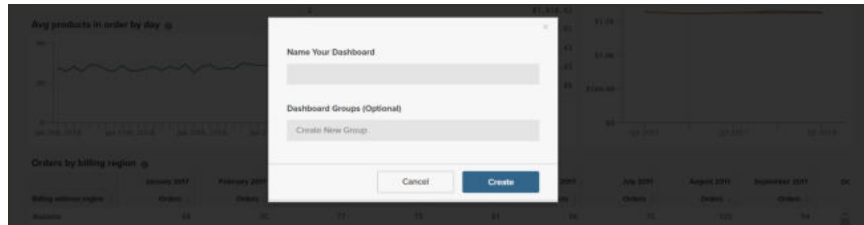
Create Dashboard

3. Tap **Create Dashboard**. Then, do the following:

- a. Enter a **Name** for your dashboard.
- b. To create a new **Group** for the dashboard, enter the name of the group.

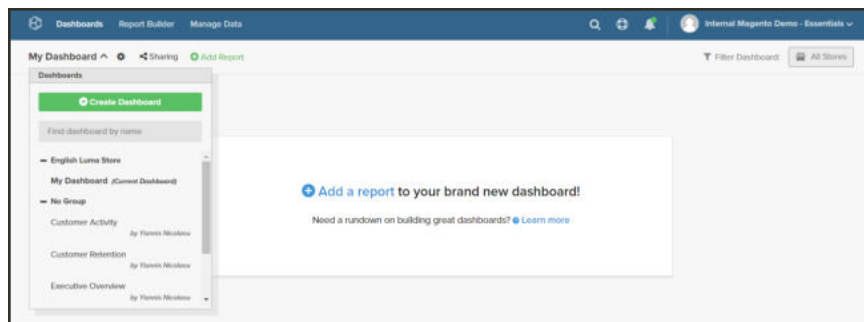
For example, if your Magento installation has multiple store views, you might create a Group for each store view.

c. Tap **Create**.



*Dashboard Name*

d. The name of your new dashboard appears in the upper-left corner. Click the down arrow to show the options. If you created a group, the new dashboard appears below the group in the list.

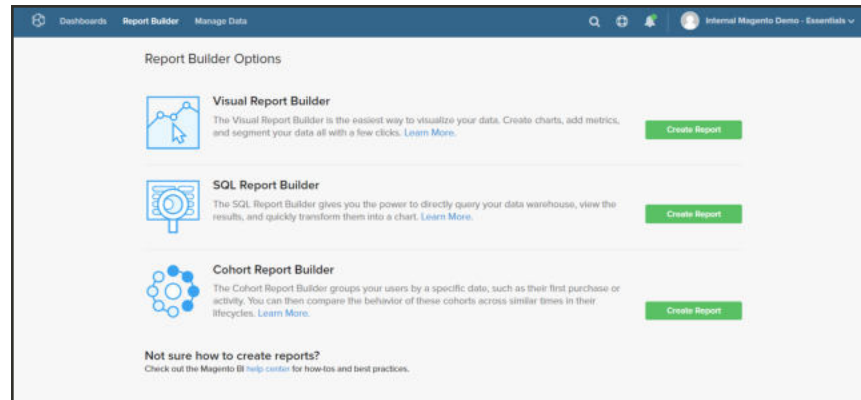


*Add Report*

4. To add a report, do one of the following:

- Click the **Add a report** prompt on the page.
- In the dashboard header, click **Add Report**.

5. Click **Create Report** to show the **Report Builder Options**.



*Report Builder Options*

### To arrange items on a dashboard:

- To resize a chart or report, drag the lower-right corner to the new size.
- To move a chart or report, hover over the title or header until the cursor changes to a cross. Then, drag it into position.

### To manage dashboard settings:

1. On the menu, choose **Manage Data**. Then in the sidebar, choose **Dashboards**.
2. If applicable, enter a new **Dashboard Name**.
3. To assign the dashboard to a specific **Dashboard Group**, choose from the list of groups.

### Permissions

To give all users the same level of access to the dashboard, do the following:

1. Under **Shared with**, choose one of the following options:
  - View
  - Edit
  - None
2. When prompted for confirm, tap **OK** to update the permissions level for each user.
3. To change the permission level of an individual, find the user in the list change the permission level. The change is automatically saved.
4. To make this dashboard the default for your BI Essentials account, tap **Make Default**.
5. To remove the dashboard, tap **Delete Dashboard**.

## Report Builder



### Visual Report Builder

---

The Visual Report Builder is the easiest way to visualize your data. Create charts, add metrics, and segment your data all with a few clicks.



### SQL Report Builder

---

The SQL Report Builder gives you the power to directly query your data warehouse, view the results, and quickly transform them into a chart.

## Visual Report Builder

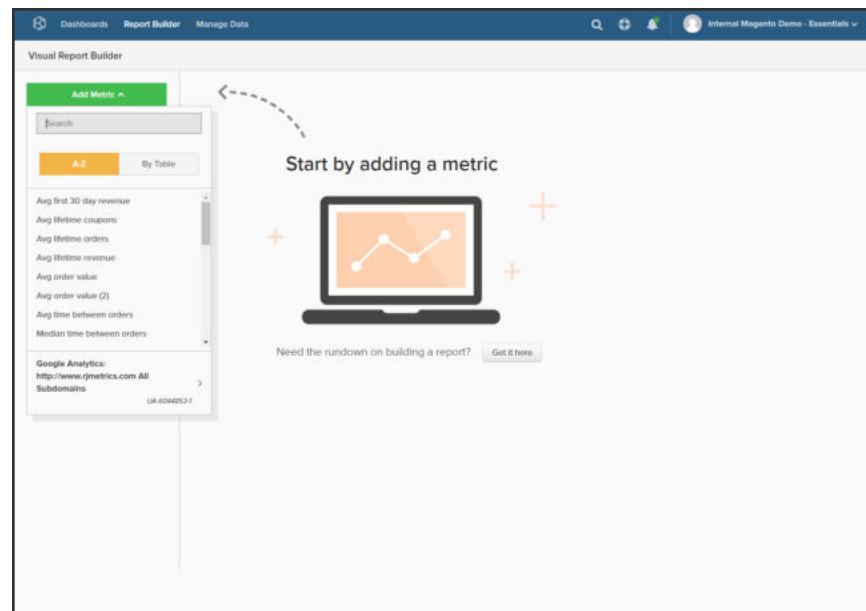
Visual Report Builder makes it easy to create quick reports based on predefined metrics. Each metric includes a query that defines the set of data for the report.

The following example shows how to create a simple report, group the data by an additional dimension, set the date and time interval, change the chart type, and save the report to a dashboard.

### To create a simple report:

1. In the BI Essentials menu, choose **Report Builder**.
2. Under **Visual Report Builder**, tap **Create Report**. Then, do the following:
  - a. Tap **Add Metric**.

The available metrics can be listed alphabetically or by table.

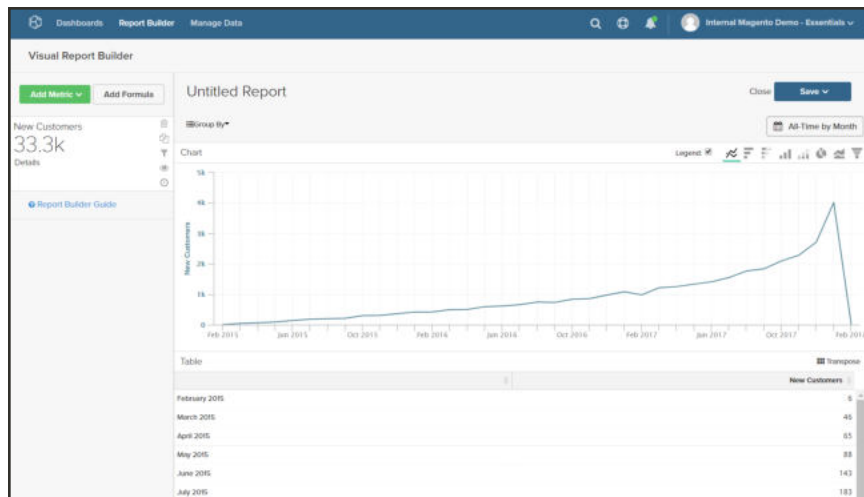


*Visual Report Builder*

- b. Choose the **metric** that describes the set of data that you want to use for the report.

The New Customers metric used in this example counts all customers, and sorts the list by the date the customer signed up for an account. The initial report includes a simple line graph, followed by the table of data.

The summary on the left shows the name of the current metric, followed by the result of any calculations on column data that are specified in the metric. In this example, the summary displays the total customer count.



Visual Report Builder

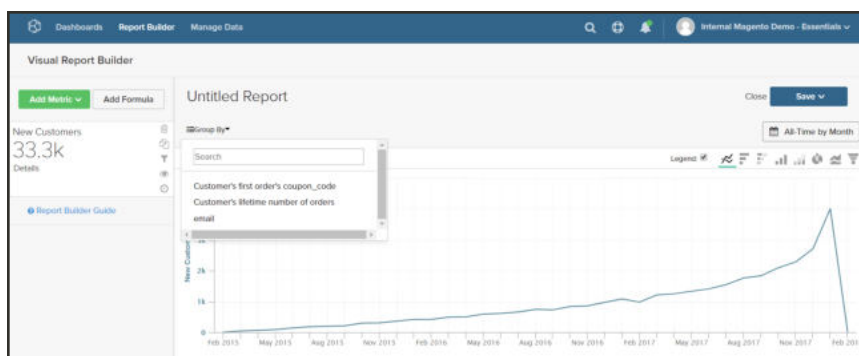
3. In the chart, hover over each data point on the line. Each data point shows the total number of new customers who signed up during that month.
4. Follow these instructions to group the data, change the date range, and chart type.

### Group By

The Group By control gives you the ability to add multiple dimensions by group or segment. Dimensions are columns in the table that can be used to group the data.

1. Choose one of the available dimensions from the list of **Group By** options.

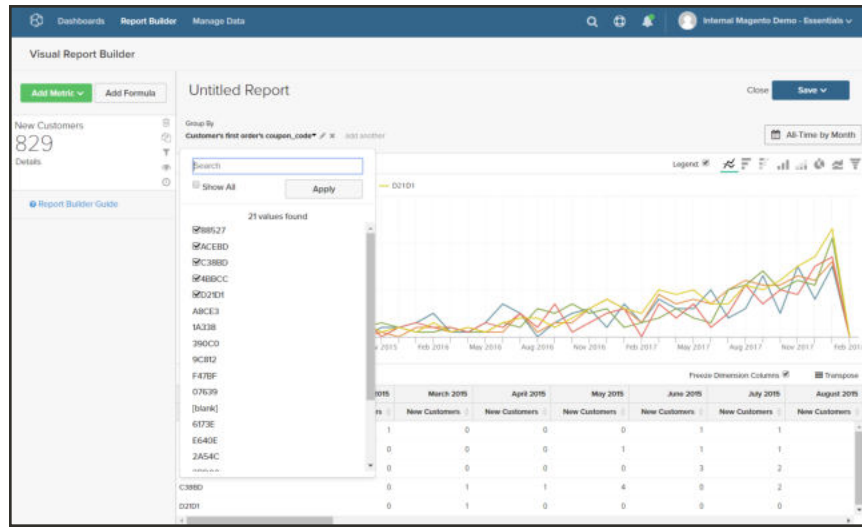
For this example, the system found five coupon codes that were used by customers while placing their first order.



Group by

2. The Group By detail lists each coupon used by customers. The coupons that were used to place the initial order are marked with a checkbox. The chart now has multiple colored lines that represent the each coupon that was used for a first order. The legend is color-coded to correspond to each row of data.

Click **Apply** to close the Group By detail.




*Multiple Dimensions*

3. Hover over a few data points on each line to see the number of customers during the month who used that coupon while placing their first order.
4. The table of data now has an addition dimension, with a column for each month, and a row for each coupon code.

	February 2015	March 2015	April 2015	May 2015	June 2015	July 2015	August 2015
Customer's first order's coupon_code	New Customers	New Customers	New Customers	New Customers	New Customers	New Customers	New Customers
4B8CC	1	0	0	0	1	1	1
88527	0	0	0	1	1	1	2
ACEBD	0	0	0	0	3	2	0
C38BD	0	1	1	4	0	2	0
D21D1	0	1	0	0	0	0	2

*Group by Table Data*

5. Click the **Transpose** (  ) control in the upper-right corner of the table to change the orientation of the data.

The axis of the data is flipped, and the table now has a column for each coupon code, and a row for each month. You might find this orientation easier to read.

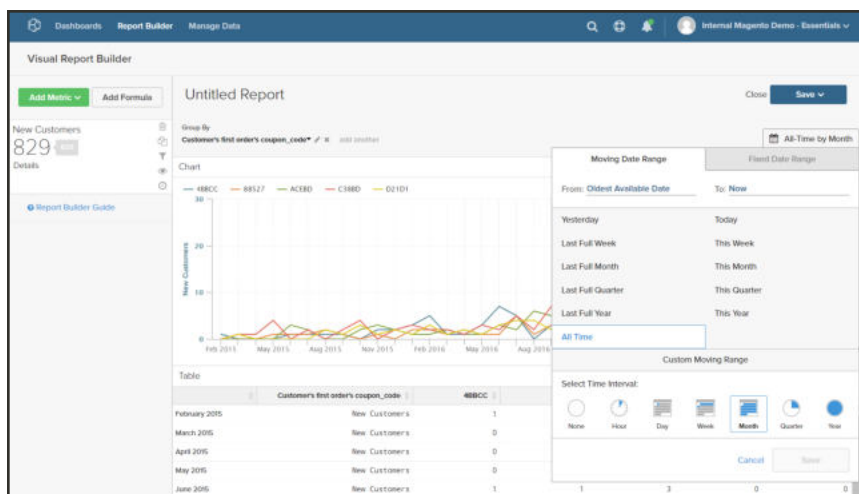
	Customer's first order's coupon_code	4B8CC	88527	ACEBD	C38BD	D21D1
February 2015	New Customers	1	0	0	0	0
March 2015	New Customers	0	0	0	1	1
April 2015	New Customers	0	0	0	1	0
May 2015	New Customers	0	1	0	4	0
June 2015	New Customers	1	1	3	0	0
July 2015	New Customers	1	1	2	2	0
August 2015	New Customers	1	2	0	0	2
September 2015	New Customers	1	1	0	2	1
October 2015	New Customers	0	0	2	4	3
November 2015	New Customers	2	1	3	0	1
December 2015	New Customers	2	0	2	2	2
January 2016	New Customers	3	2	1	3	1

*Transposed Data*

## Date Range

The Date Range control shows the current date range and time interval settings, and is located just above the chart to the right.

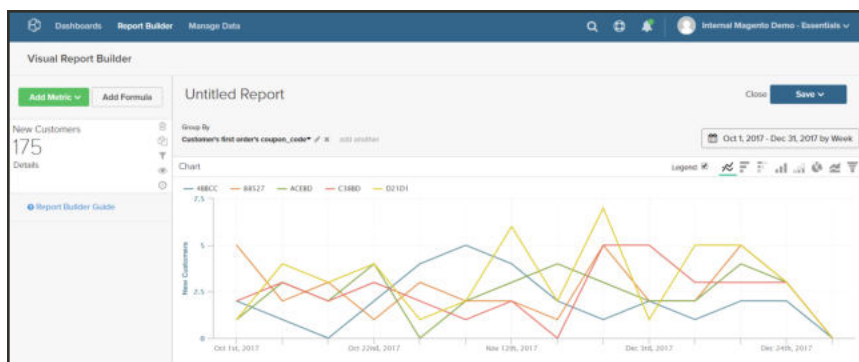
1. Click the **Date Range** control, which in this example is set to “All-Time by Month.”



*Date Range*

2. Make the following changes:
  - a. To zoom in for a closer view, change the date range to **Last Full Quarter**.
  - b. Under **Select Time Interval**, choose “Week.”
  - c. When complete, tap **Save**.

The report now includes only the data for the last quarter, by week.



*Report for Last Quarter by Week*

## Chart Type

Click the controls in the upper-right corner to find the best chart for the data.



Some chart types are not compatible with multidimensional data.



Line graph



Horizontal Bar



Horizontal Stacked Bar



Vertical Bar



Vertical Stacked Bar



Pie

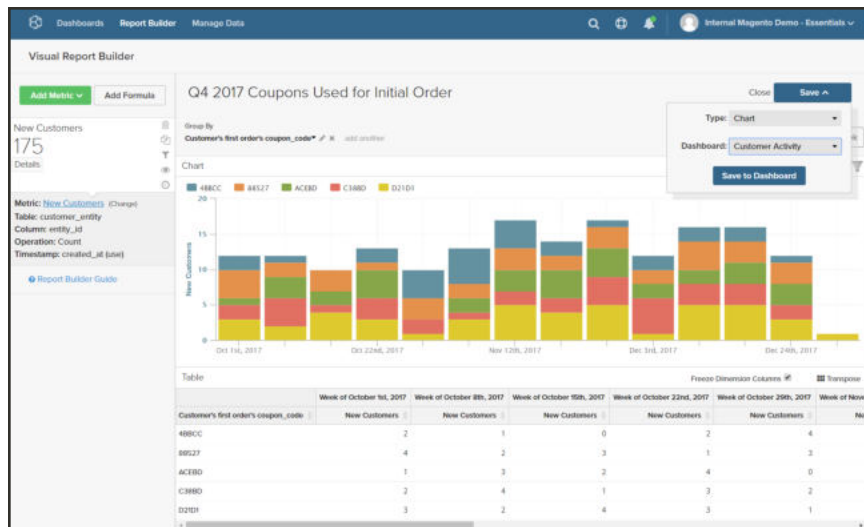


Area



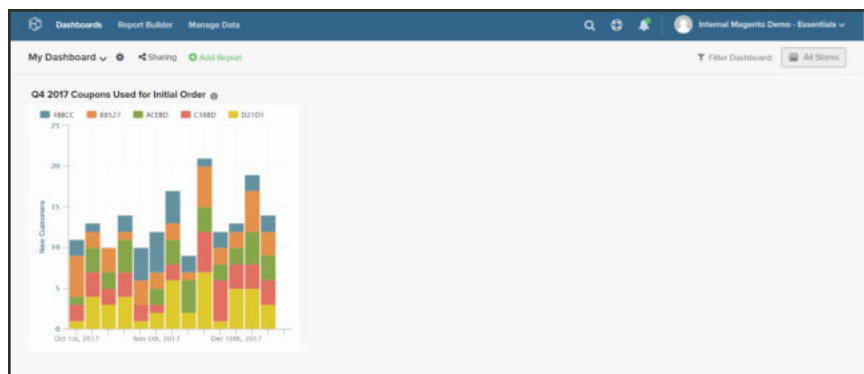
Funnel

5. To give the report a **title**, replace the “Untitled Report” text at the top of the page with a descriptive title.
6. In the upper-right corner, tap **Save**. Then do the following:
  - a. For **Type**, accept the default setting, “Chart.”
  - b. Choose the **Dashboard** where the report is to be available.
  - c. Tap **Save to Dashboard**.



Save to Dashboard

7. To view the chart in a dashboard, do one of the following:
  - Click **Go to Dashboard** in the message at the top of the page.
  - In the menu, choose **Dashboards**. Click the name of the current dashboard to display the list. Then, click the name of the dashboard where the report was saved.



Report in Dashboard


## Filters

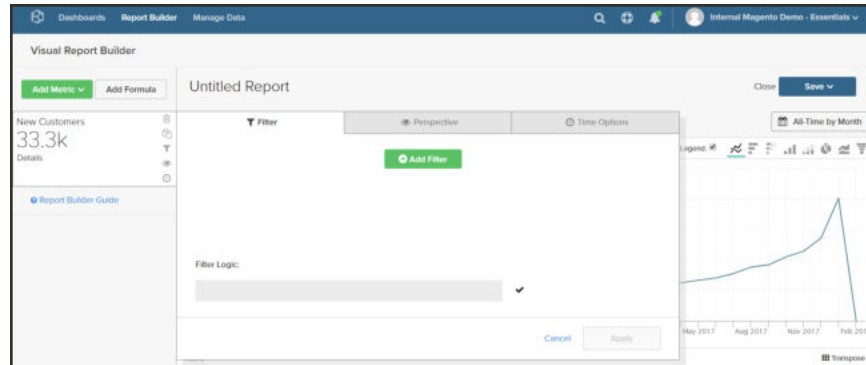
One or more filter(s) can be added to limit the data that is used to product a report. Each filter is an expression that includes a column from the associated table, an operator, and a value. For example to include only repeat customers, you might create a filter that includes only customers who have placed more than one order. Multiple filters can be used with logical “AND/OR” operators to add logic to the report.

A report can have a maximum of 3,500 data points. To reduce the number of data points, use a filter to reduce the amount of data that is used to generate the report.

Magento BI includes a selection of filters that you can use “out of the box,” or modify to suit your needs. There is no limit to the number of filters you can create.

### To add a filter

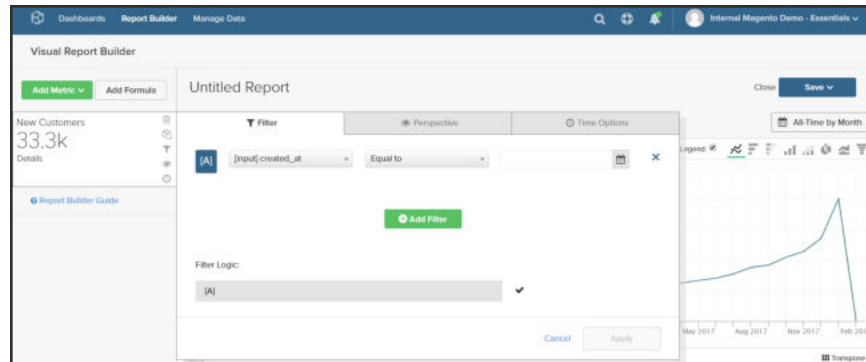
1. In the chart, hover over each data point. In this report, each data point shows the total number of customers for the month.
2. In the panel on the left, click the **Filters** (  ) icon.



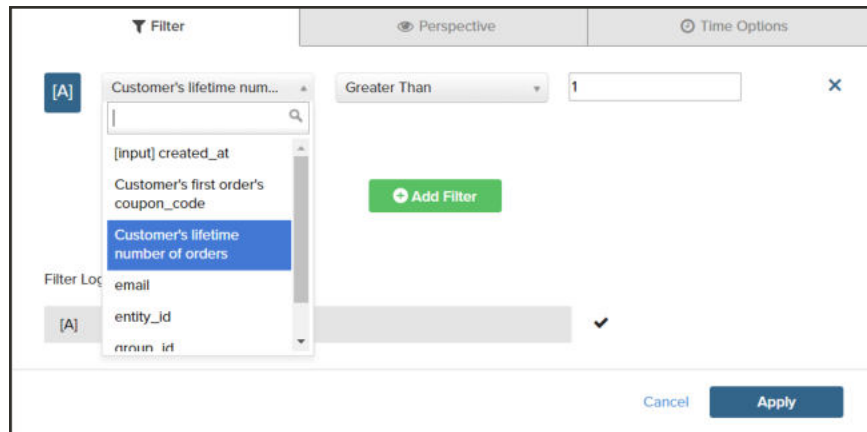
*Add Filter*

3. Tap **Add Filter**.

Filters are numbered alphabetically, and the first is [A]. The first two parts of the filter are drop-down lists of options, and the third part is a value.

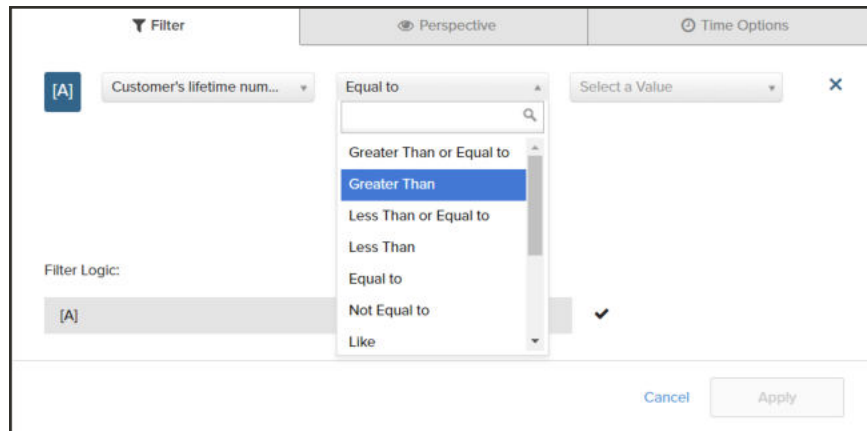


- a. Click the first part of the filter, and choose the column that you want to use as the subject of the expression.



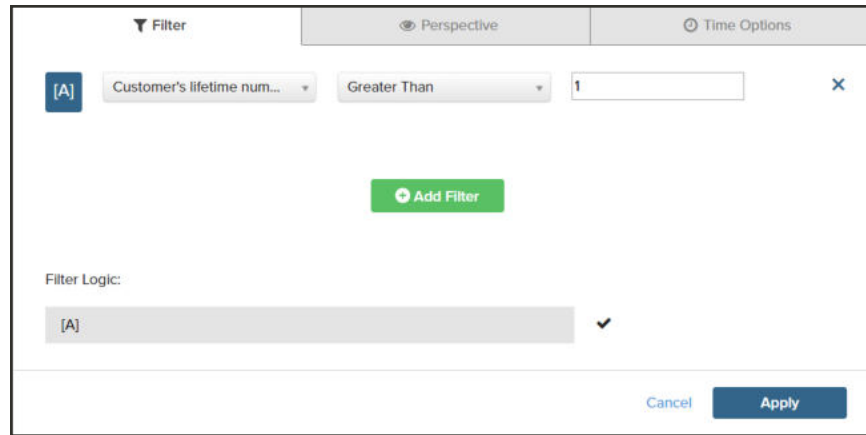
*Choose First Part of Filter*

- b. Click the second part of the filter, and choose the operator.



*Choose the Operator*

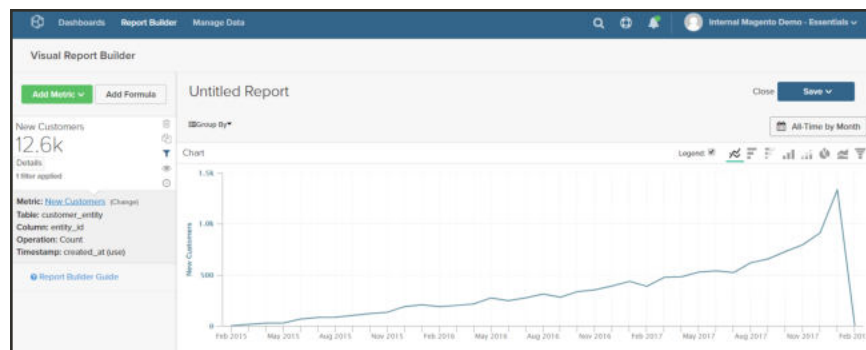
- c. In the third part of the filter, enter the value that is needed to complete the expression.



*Enter the Value*

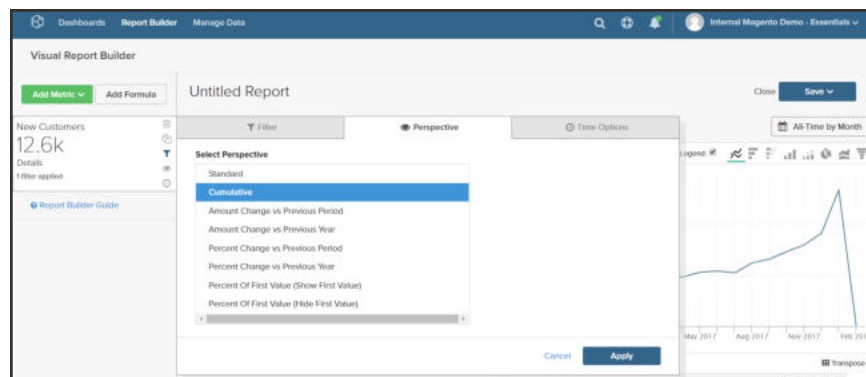
- d. When the filter is complete, tap **Apply**.

The report now includes only repeat customers, and the number of customer records retrieved for the report has been reduced from 33K to 12.6k.



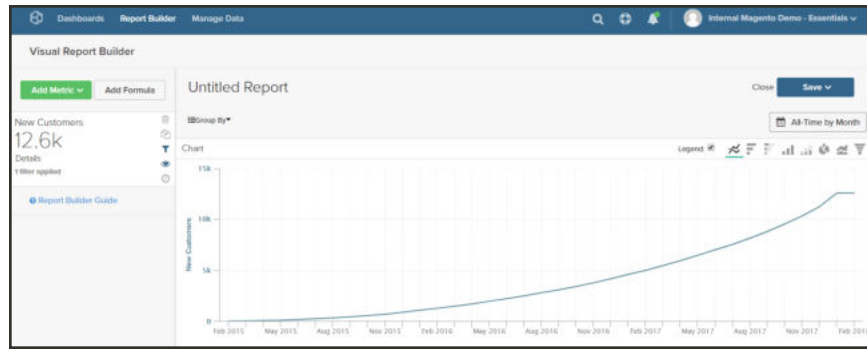
*Filtered Report*

- 4. In the sidebar, click the **Perspective** (  ) icon.



*Perspective*

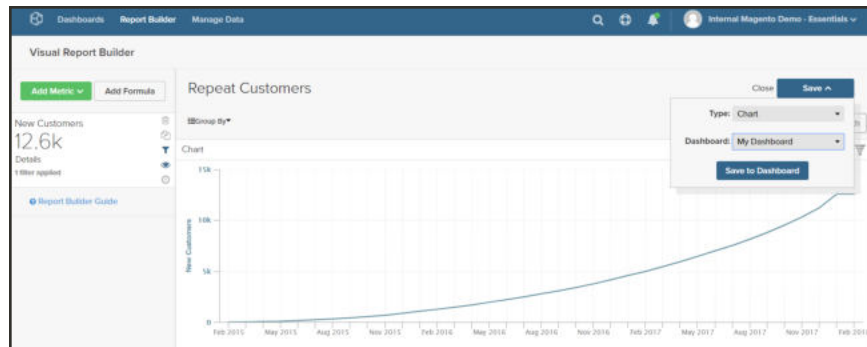
- 5. In the list of settings, choose **Cumulative**. Then, tap **Apply**.



*Cumulative Perspective*

The Cumulative perspective distributes the change over time, rather than showing the jagged up and downs for each month.

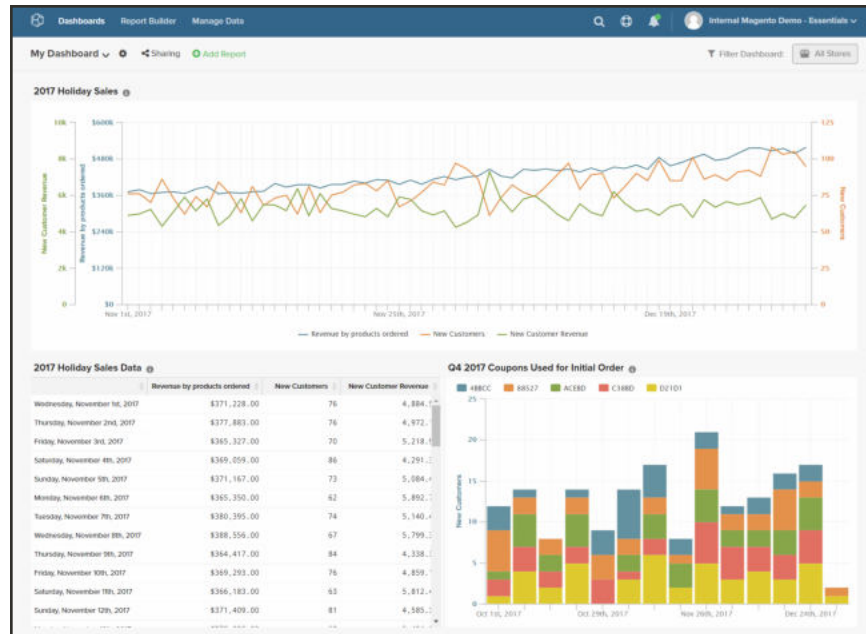
- 6. Enter a **Title** for the report. Then, **Save** it as a **Chart** to your dashboard.



*Save to Dashboard*

## Formulas

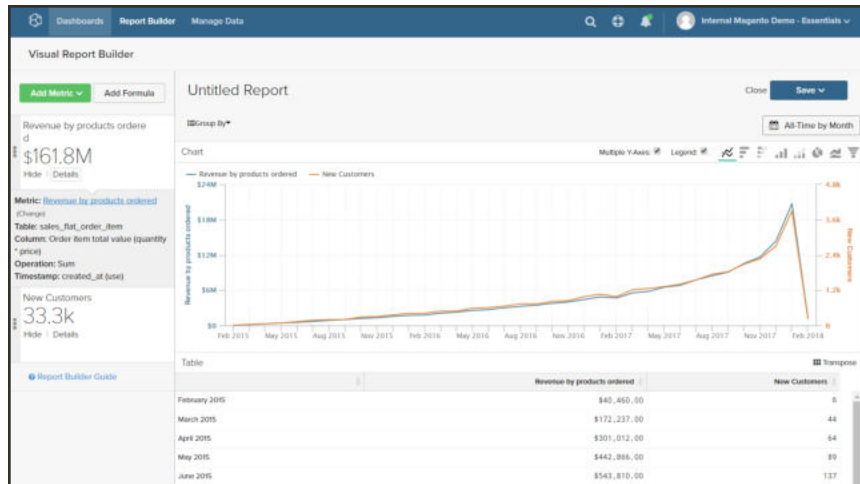
A formula combines multiple metrics and mathematical logic to answer a question. For example, how much of the revenue per product during the holiday season was generated by new customers?



*Holiday Sales in Dashboard*

### Step 1: Create the Basic Report

1. In the menu, choose **Report Builder**.
2. Tap **Add Metric**, and choose the first metric for the report.  
For this example, the “Revenue by products ordered” metric is used.
3. Tap **Add Metric** again, and choose the second metric for the report.  
For this example, the “New Customers” metric is used.
4. In the sidebar, click **Details** to display information about each metric.



*Revenue by Products Ordered*

- In the sidebar, click the name of each metric to open the settings page in a new browser tab. Scroll down to see each component of the metric, including the metric query, filter, and dimensions.

*Metric Settings*

- To return to your report, click the previous browser tab.
- In the chart, hover over a few data points on each line to see the amounts associated with each metric.



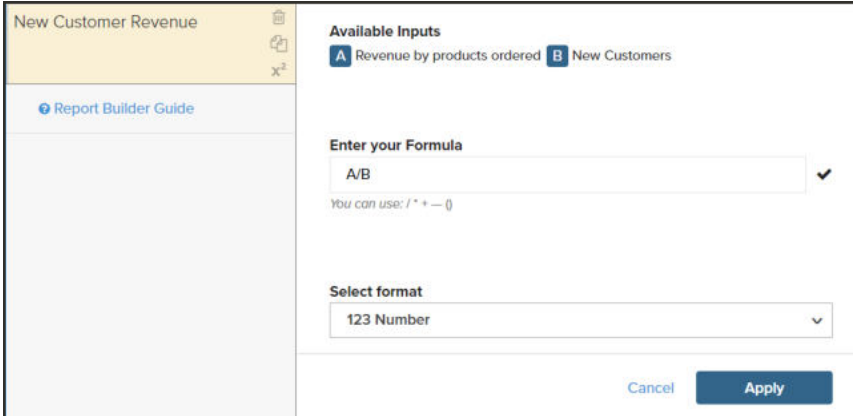
## Step 2: Add a Formula

1. At the top of the sidebar, tap **Add Formula**.

The formula box shows the metrics as available inputs A and B, and includes an input box where you can enter the formula.

Do the following:

- a. In the **Enter your Formula** input box, enter “A/B”.  
This will divide the revenue by products ordered by the number of new customers.
- b. Set **Select format** to “123Number.”
- c. In the sidebar, replace “Untitled” with a name for the formula.

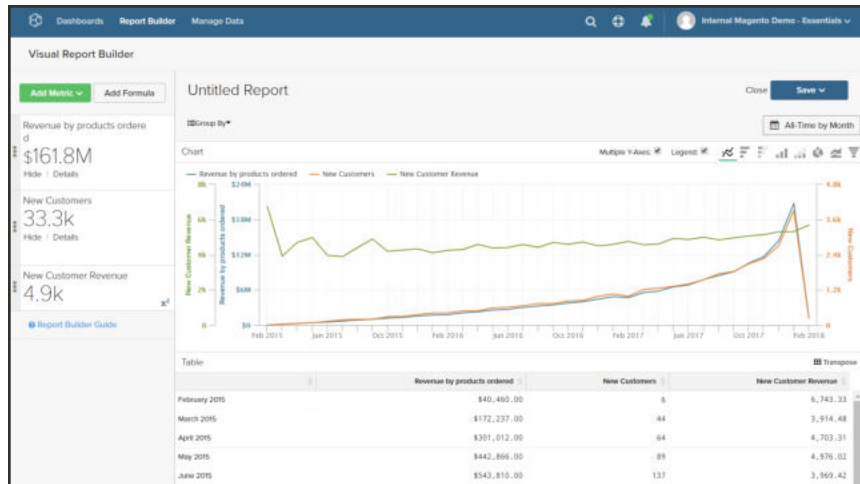


The screenshot shows a dialog box titled "New Customer Revenue" with a sidebar on the left containing a "Report Builder Guide" link. The main area is divided into sections: "Available Inputs" with two options, "A Revenue by products ordered" and "B New Customers"; "Enter your Formula" with a text input field containing "A/B" and a checkmark, with a note "You can use: / \* + - ()"; and "Select format" with a dropdown menu set to "123 Number". At the bottom right are "Cancel" and "Apply" buttons.

*Formula Settings*

2. When complete, tap **Apply**.

The report now has a new line for the formula, “New Customer Revenue,” and the sidebar shows the total amount of revenue generated by new customers.



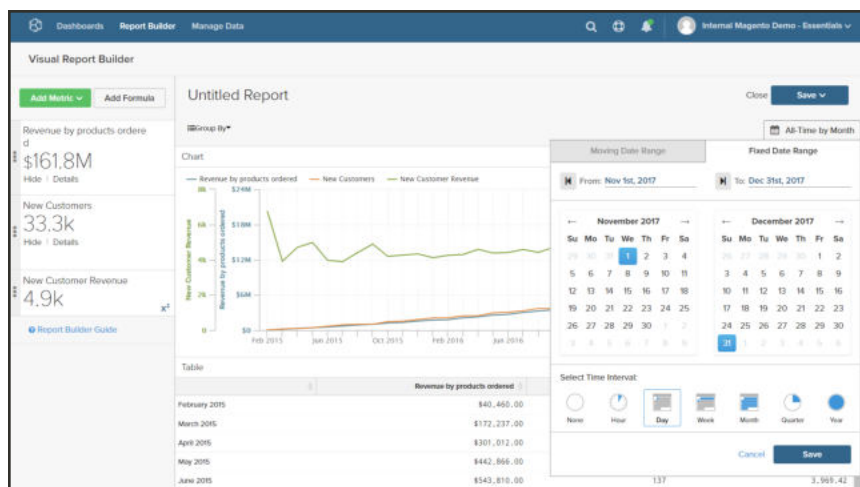
Report with Formula

### Step 3: Add a Date Range

1. Click the **Date Range** control in the upper-right corner.
2. On the **Fixed Date Range** tab, do the following:
  - a. On the calendars, choose the date range.

For this example, the holiday season is from November 1 through December 31.

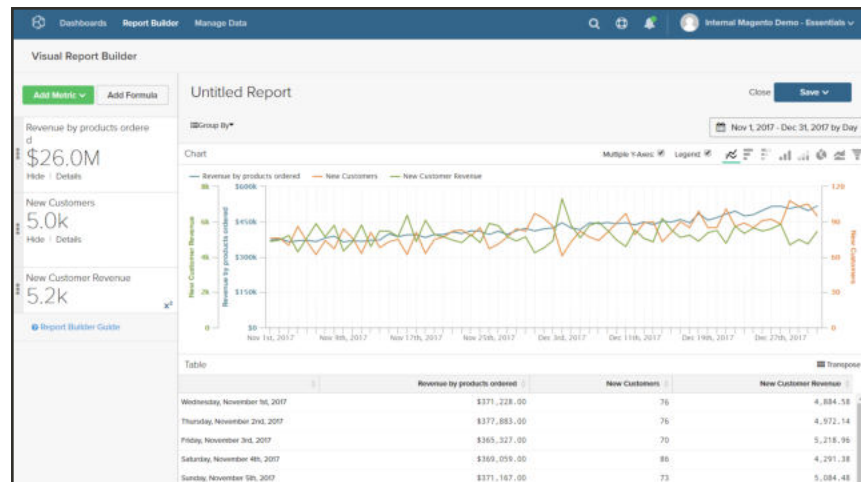
- b. Under **Select Time Interval**, choose “Day.”



Fixed Date Range

- c. When complete, click **Apply**.

The report is now limited to the holiday season, with a data point for each day.



*Fixed Date Range*

#### Step 4: Save the Report

In this step, you will save the report as a chart, and also as a table.

1. Click the “Untitled Report” text at the top of the page, and enter a descriptive title. For this example, the report title is “2017 Holiday Sales.”

Then, do the following:

- a. In the upper-right corner, tap **Save**.
  - b. For **Type**, accept the default setting, “Chart.”
  - c. Choose the **Dashboard** where the report is to be available.
  - d. Tap **Save to Dashboard**.
2. Click the report title, and change the name. For this example, the report title is changed to “2017 Holiday Sales Data”

Then, do the following:

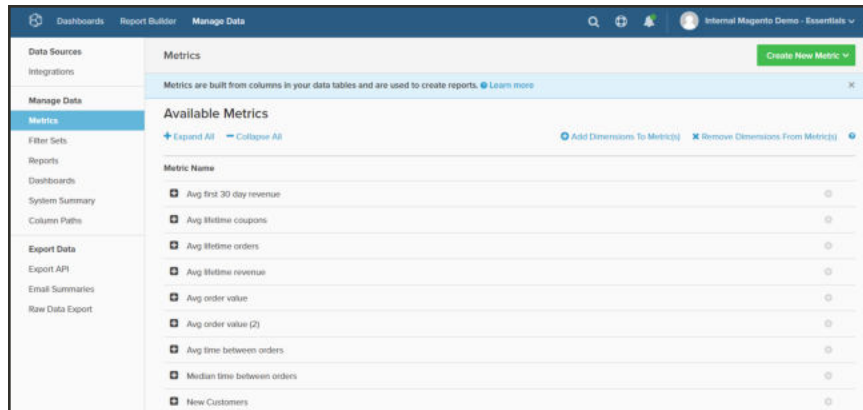
- a. In the upper-right corner, tap **Save a Copy**.
  - b. Set **Type** to “Table.”
  - c. Choose the **Dashboard** where the report is to be available.
  - d. Tap **Save a Copy to Dashboard**.
3. To see the reports in your dashboard, do one of the following:
    - Click **Go to Dashboard** in the message at the top of the page.
    - In the menu, choose **Dashboards**. Click the name of the current dashboard to display the list. Then, click the name of the dashboard where the report was saved.

## Manage Data

Manage Data provides access to a variety of tools for managing integrations, report and chart data, dashboards, and exports.

### To access Manage Data:

1. In the menu, choose **Manage Data**.
2. In the sidebar, choose the topic that you want under the following headings:
  - Data Sources
  - Manage Data
  - Export Data



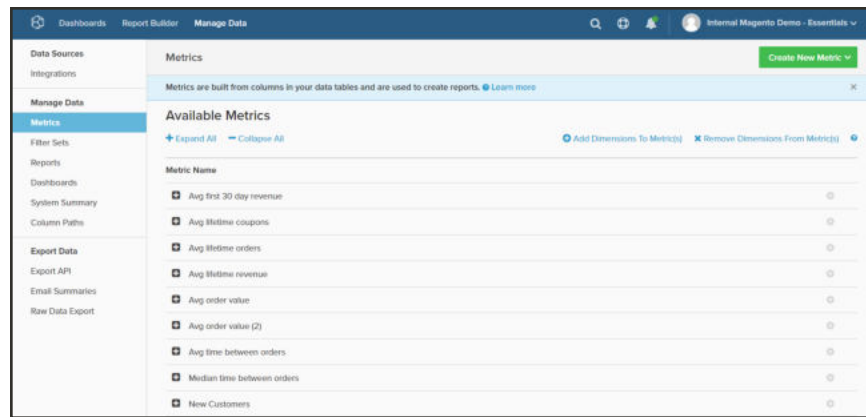
*Manage Data*

# Metrics

Each report includes at least one query that defines the set of data, or “metrics” for the report. The metrics statement describes the data that is to be retrieved, and consists of an operator, column, table, and sorting order. Magento BI includes a set of default, “out of the box” metrics that can be easily customized. You can create an unlimited number of custom metrics.

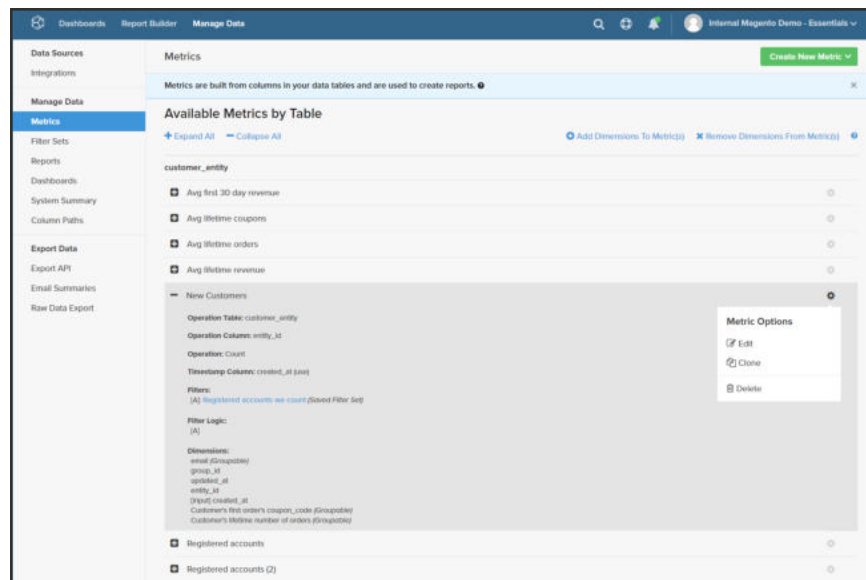
## To access the available metrics:

1. On the menu, choose **Manage Data**.
2. In the sidebar, choose **Metrics**.



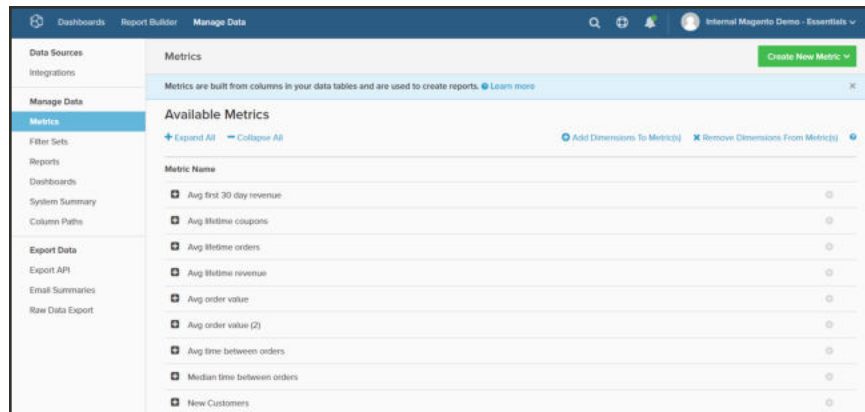
*Metrics*

3. Click the name of any metric to display detailed information. To show the Metric Options, click the **Settings** ( ⚙ ) icon on the right.



*Metric Detail*

- Click **Details** to display more information about the metric.



*Metrics*

### Default Metrics by Table

FIELD	DESCRIPTION
<b>customer_entity</b>	
Avg first 30 day revenue	<b>Average</b> on the <b>Customer's first 30 day revenue</b> column in the <b>customer_entity</b> table (Change) ordered by the <b>created_at (use)</b> column
	Filter A      Seconds since customer's first order date >=2592000
	Filter B      Registered accounts we count (Saved Filter Set)
Avg lifetime coupons	<b>Average</b> on the <b>Customer's lifetime number of coupons</b> column in the <b>customer_entity</b> table (Change) ordered by the <b>created_at (use)</b> column
	Filter A      Registered accounts we count (Saved Filter Set)
Avg lifetime orders	<b>Average</b> on the <b>Customer's lifetime number of orders</b> column in the <b>customer_entity</b> table (Change) ordered by the <b>created_at (use)</b> column
	Filter A      Registered accounts we count (Saved Filter Set)

### Default Metrics by Table (cont.)

FIELD	DESCRIPTION
Avg Lifetime revenue	<p><b>Average</b> on the <b>Customer's lifetime number of orders</b> column in the <b>customer_entity</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A Registered accounts we count (Saved Filter Set)</p>
New Customers	<p><b>Count</b> on the <b>entity_id</b> column in the <b>customer_entity</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A Registered accounts we count (Saved Filter Set)</p>
Registered accounts	<p><b>Count</b> on the <b>entity_id</b> column in the <b>customer_entity</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A Registered accounts we count (Saved Filter Set)</p>
<b>customer_group</b>	
New Metric	<p><b>Count</b> on the <b>customer_group_id</b> column in the <b>customer_group</b> table (Change) ordered by the <b>[NONE]</b> column</p>
<b>sales_flat_order</b>	
Avg order value	<p><b>Average</b> on the <b>base_grand_total</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A Orders we count (Saved Filter Set)</p>
Avg time between orders	<p><b>Average</b> on the <b>Seconds since previous order</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A Orders we count (Saved Filter Set)</p>

### Default Metrics by Table (cont.)

FIELD	DESCRIPTION
Median time between orders	<p><b>Median</b> on the <b>Seconds since previous order</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A                      Orders we count (Saved Filter Set)</p>
New Metric 2 (Number of orders)	<p><b>Count</b> on the <b>entity_id</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>[input] created_at (use)</b> column</p> <p>Filter A                      Orders we count (Saved Filter Set)</p>
Orders	<p><b>Count</b> on the <b>entity_id</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>[input] created_at (use)</b> column</p> <p>Filter A                      Orders we count (Saved Filter Set)</p>
Revenue	<p><b>Sum</b> on the <b>base_grand_total</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A                      Orders we count (Saved Filter Set)</p>
Shipping	<p><b>Sum</b> on the <b>base_shipping_amount</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A                      Orders we count (Saved Filter Set)</p>
Tax	<p><b>Sum</b> on the <b>base_tax_amount</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A                      Orders we count (Saved Filter Set)</p>
Unique Customers	<p><b>Count Distinct Values</b> on the <b>customer_email</b> column in the <b>sales_flat_order</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A                      Orders we count (Saved Filter Set)</p>
<b>sales_flat_order_item</b>	



### Default Metrics by Table (cont.)

FIELD	DESCRIPTION
Products Ordered	<p><b>Sum</b> on the <b>qty_ordered</b> column in the <b>sales_flat_order_item</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A                      Ordered products we count (Saved Filter Set)</p>
Revenue by products ordered	<p><b>Sum</b> on the <b>Order item total value (quantity * price)</b> column in the <b>sales_flat_order_item</b> table (Change) ordered by the <b>created_at (use)</b> column</p> <p>Filter A                      Ordered products we count (Saved Filter Set)</p>

### Metric Options

FIELD	DESCRIPTION
Operator	<ul style="list-style-type: none"> <li>Average</li> <li>Count</li> <li>Sum</li> <li>Average</li> <li>Maximum Value</li> <li>Minimum Value</li> <li>Count Distinct Values</li> <li>Median</li> <li>First Quartile</li> <li>Third Quartile</li> <li>Tenth Percentile</li> <li>Ninetieth Percentile</li> </ul>
Table	<ul style="list-style-type: none"> <li>addresses</li> <li>categories</li> <li>customer_entity</li> <li>customer_group</li> <li>sales_flat_order</li> <li>sales_flat_order_address</li> <li>sales_flat_order_item</li> </ul>

**Metric Options (cont.)**

FIELD	DESCRIPTION
Target Column by Table	<p>customer_entity</p> <p>Customer's first 30 day revenue  Customer's lifetime number of coupons  Customer's lifetime number of orders  Customer's lifetime revenue  entity_id  group_id  Seconds since customer's first order date</p> <p>customer_group</p> <p>customer_group_id</p> <p>sales_flat_order</p> <p>base_grand_total  base_shipping amount  base_tax_amount  billing_address_id  Customer's lifetime number of coupons  Customer's lifetime number of orders  Customer's lifetime revenue  customer_id  entity_id  Number of items in order  Seconds between customer's first order date and this order  Seconds since previous order  shipping_address_id  store_id</p> <p>sales_flat_order_item</p> <p>base_price  Customer's lifetime number of orders  Customer's lifetime revenue  item_id  Order item total value (quantity * price)  order_id  product_id  qty_ordered</p>
Order Column	<p>[NONE]  created_at (use)  updated_at  [input] created at</p>

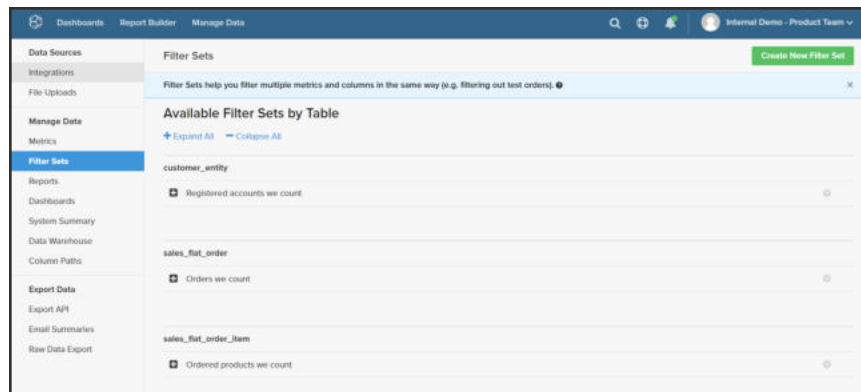
## Filter Sets

A filter set is based on a table, and can include multiple statements with logic to select the data for a report or chart. Magento BI includes several default filter sets that you can use “as is” or modify. There is no limit to the number of filter sets that you can create.

A filter set can be applied to any metric that uses the same table. To learn more, see [Creating filter sets for metrics](#) in the Magento BI Help Center.

### To see the available filter sets:

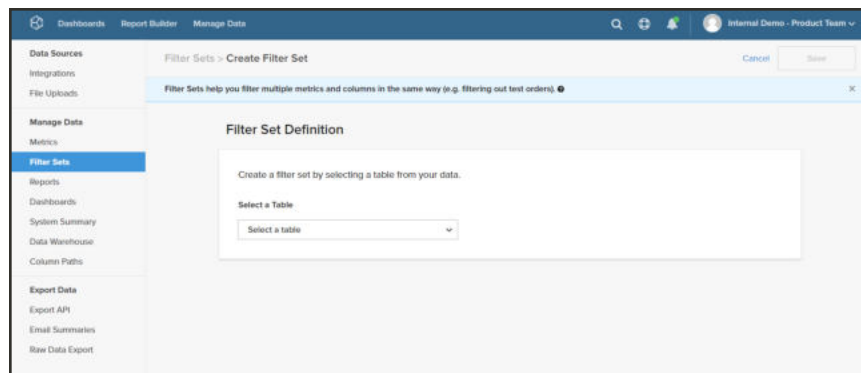
1. On the menu, choose **Manage Data**. Then in the sidebar under Manage Data, choose **Filter Sets**.
2. Click **Expand All** to display the detail of each filter set that is currently available.



*Filter Sets*

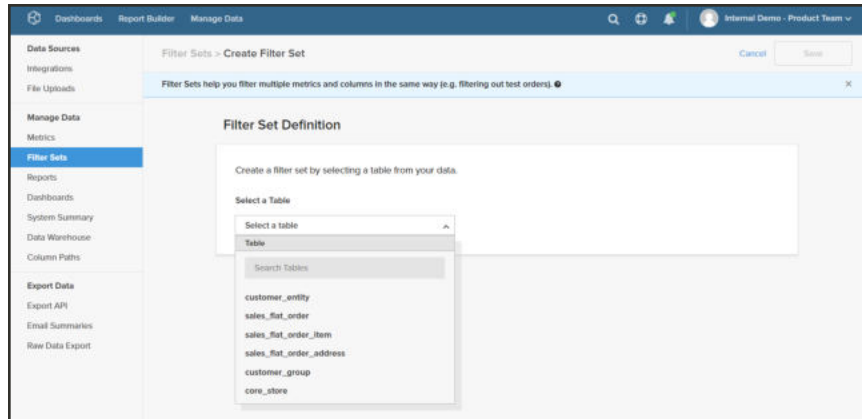
### To create a new filter set:

1. In the upper-right corner of the Filter Sets page, tap **Create New Filter Set**. Then, do the following:



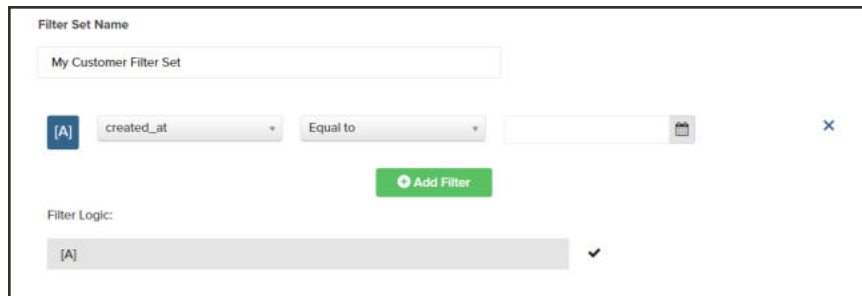
*Create Filter Set*

- a. Under **Select a Table**, choose the table upon which the filter set is based.



Select a Table

- b. Enter the **Filter Set Name**.
- c. Tap **Add Filter**. Then, follow the **instructions** to build each part of the expression.



Add Filter

- d. To add another filter, tap **Add Filter**. Then, build the expression.
  - e. To complete the **Filter Logic**, use the AND/OR operators to describe how multiple statements in the filter are to be applied.
2. When complete, tap **Save**.

The new filter appears in the list of Available Filter Sets by Table.

### Default Filters by Table

FIELD	DESCRIPTION
customer_entity	Registered accounts we count (Saved Filter Set)
created_at (use)	Customer's first 30 day revenue

**Default Filters by Table (cont.)**

FIELD	DESCRIPTION
	Customer's first order's billing region
	Customer's first order's coupon code
	Customer's first order date
	Customer's group code
	Customer's lifetime number of coupons
	Customer's lifetime number of orders
	Customer's lifetime revenue
	email
	entity_id
	group_id
	Seconds since customer's first order date
	updated_at
	[input] created at
sales_flat_order	Orders we count (Saved Filter Set)
	base_grand_total
	base_shipping_amount
	base_tax_amount
	Billing address city
	Billing address country
	Billing address region
	billing_address_id
	coupon_code
	created_at (use)
	Customer's creation date
	Customer's first order date
	Customer's group code
	Customer's lifetime number of coupons
	Customer's lifetime revenue
	Customer's order number
	Customer's order number (previous-current)
	customer_email
	customer_id
	entity_id
	Is customer's last order?
	Number of items in order

**Default Filters by Table (cont.)**

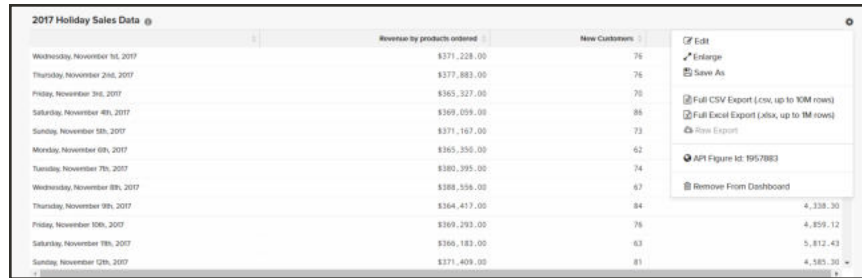
FIELD	DESCRIPTION
	order_currency_code
	Seconds between customer's first order date and this order
	Seconds since previous order
sales_flat_order_item	Ordered products we count(Saved Filter Set)
	base_price
	created_at (use)
	Customer's lifetime number of orders
	Customer's lifetime revenue
	Customer's order number
	item_id
	name
	Order's coupon_code
	Order item total value (quantity * price)
	order_id
	product_id
	product_type
	qty_ordered
	sku
	updated_at
	[input] created_at

## Export Data

Raw report data can be exported from the Magento BI data warehouse to a CSV or Excel file. You can also create a list of raw, exported data from tables that refreshes every 15 seconds to ensure that the data is always current.

### To export report data:

1. In the header of a report, click the **Settings** (  ) control.



*Report Settings*

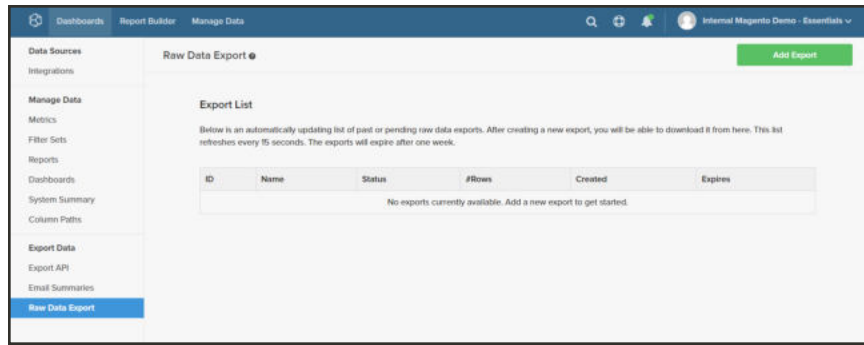
2. Choose one of the following options:
  - Full CSV Export
  - Full Excel Export
3. Watch the bottom of the window for the export file. Then, open the file.

	A	B	C	D	E	F	G	H	I	J
1	2017 Holiday Sales Data									
2										
3	Category	Revenue by products ordered	New Customers	New Customer Revenue						
4	2017-11-01 00:00:00	371228	76	4884.578947						
5	2017-11-02 00:00:00	377883	76	4972.144737						
6	2017-11-03 00:00:00	365327	70	5218.957143						
7	2017-11-04 00:00:00	369059	86	4291.383721						
8	2017-11-05 00:00:00	371167	73	5084.479452						
9	2017-11-06 00:00:00	365350	62	5892.741935						
10	2017-11-07 00:00:00	380395	74	5140.472973						
11	2017-11-08 00:00:00	388556	67	5799.343284						
12	2017-11-09 00:00:00	364417	84	4338.297619						
13	2017-11-10 00:00:00	369293	76	4859.118421						
14	2017-11-11 00:00:00	366183	63	5812.428571						
15	2017-11-12 00:00:00	371409	81	4585.296296						
16	2017-11-13 00:00:00	372930	68	5484.264706						
17	2017-11-14 00:00:00	398559	73	5459.712329						
18	2017-11-15 00:00:00	386551	75	5154.013333						
19	2017-11-16 00:00:00	394430	62	6361.774194						
20	2017-11-17 00:00:00	394376	81	4868.839506						
21	2017-11-18 00:00:00	383357	63	6085.031746						

*Exported Data in Excel*

### To create an export list:

1. On the menu, choose **Manage Data**.
2. In the sidebar under **Export Data**, choose **Raw Data Export**.



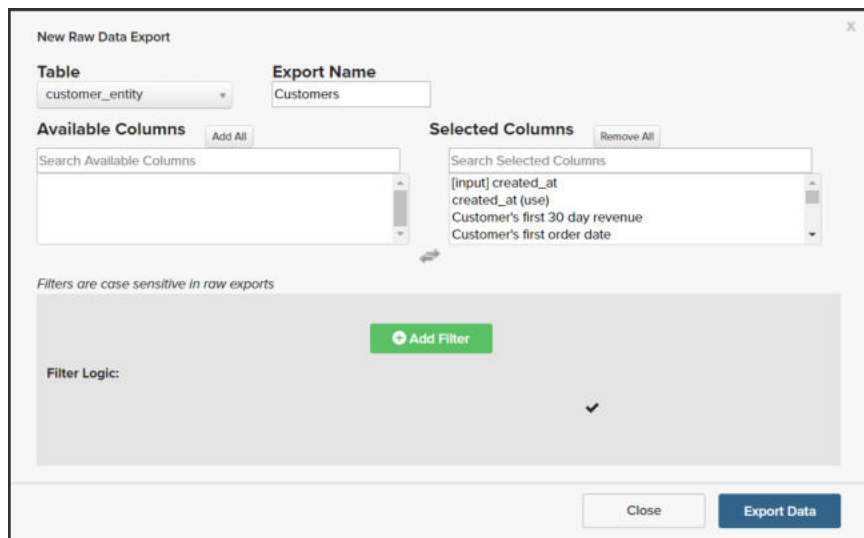
*Raw Data Export*

3. Tap **Add Export**. Then, do the following:
  - a. Choose the **Table**.



*Choose Table*

- b. Enter the **Export Name**.
    - c. Under **Available Columns**, tap **Add All**.

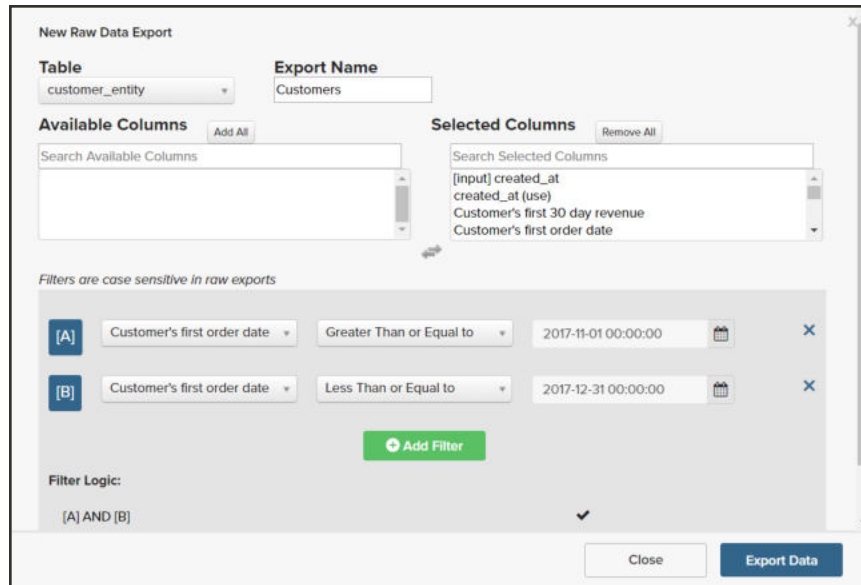


*Choose Columns*

- d. If you want to add a filter, tap **Add Filter**. Then, follow the instructions to **create a filter** for the exported data.



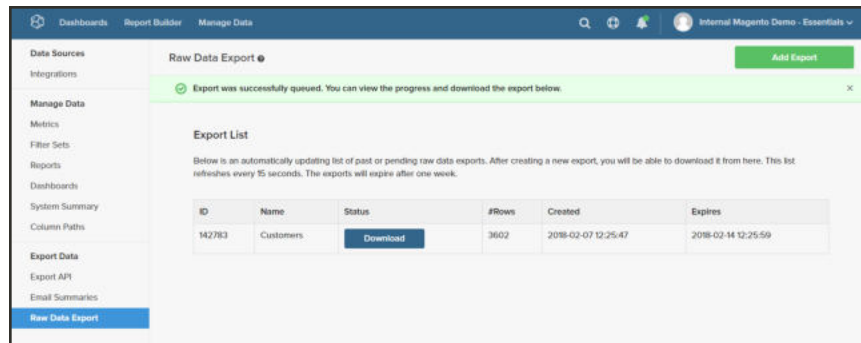
The filters in this example includes all customers who placed their first order during the 2018 holiday season.



*Filters*

4. When ready, tap **Export Data**.

Look for a message that says the export is successfully queued. The export appears in the list when the process is complete.



*Export List*

5. To download the exported data, tap **Download**. Then, look for the exported zip file at the bottom of the window.



## CHAPTER 79:

# New Relic Reporting

New Relic is a SaaS based subscription service that provides detailed real-time visibility into business and performance metrics for data-driven decision making.

### Step 1: Sign Up for a New Relic Account

1. Visit the [New Relic](#) website, and sign up for an account. You can also sign up for a [free trial account](#).
2. Follow the instructions on the site. When prompted choose the product that you want to install first.
3. While you are in your account, locate the following credentials that you will need to complete the configuration:

Account ID	From your New Relic account dashboard, the Account ID is the number in the URL after: <code>/accounts</code>
Application ID	From your New Relic account dashboard, tap New Relic APM. In the menu, choose Applications. Then, choose your application. The Application ID is the number in the URL after: <code>/applications/</code>
New Relic API Key	From your New Relic account dashboard, tap Account Settings. In the menu on the left under Integrations, choose Data Sharing. Your API key can be created, regenerated, or deleted from this page.
Insights API Key	From your New Relic account dashboard, tap Insights. In the menu on the left under Administration, choose API Keys. Your Insights API Key(s) appear on this page. If necessary, click the plus sign (+) next to Insert Keys to generate a key.

### Step 2: Install the New Relic Agent on Your Server

To use New Relic APM Pro to gather and transmit data, the PHP agent must be installed on your server.

1. When prompted to choose a web agent, tap **PHP**.
2. Follow the instructions to set up the PHP agent on your server. If you need help, see: [New Relic for PHP](#).

3. Make sure that cron is running on your server. To learn more, see: [Configure and run cron](#).

### Step 3: Configure Your Store

1. On the Admin menu, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **New Relic Reporting**. Then, do the following:

The screenshot shows the 'General' settings panel for 'New Relic Reporting'. It contains the following fields and options:

- Enable New Relic Integration**: A dropdown menu set to 'No'. A checkbox 'Use system value' is checked.
- New Relic API URL**: A text input field containing 'https://api.newrelic.com/deployments.xml'. A checkbox 'Use system value' is checked.
- Insights API URL**: A text input field containing 'https://insights-collector.newrelic.com/v1/accounts/%s/events'. A checkbox 'Use system value' is checked. Below the field is the instruction: 'Use %s to replace the account ID in the URL'.
- New Relic Account ID**: An empty text input field. Below it is the instruction: '\*Need a New Relic account? [Click here to get one](#)'.
- New Relic Application ID**: An empty text input field. Below it is the instruction: 'This can commonly be found at the end of the URL when viewing the APM after "/>

### *New Relic Reporting*

- a. Set **Enable New Relic Integration** to “Yes.”
  - b. In the **Insights API URL**, replace the percent (% symbol with your New Relic Account ID.
  - c. Enter your **New Relic Account ID**.
  - d. Enter your **New Relic Application ID**.
  - e. Enter your **New Relic API Key**.
  - f. Enter you **Insights API Key**.
3. In the **New Relic Application Name** field, enter a name to identify the configuration for internal reference.
  4. Optional, for the **Send Adminhtml and Frontend as Separate Apps** field, select No (default) or Yes to send collected data for the storefront and Admin as separate apps to New Relic. This option requires a name entered for the **New Relic Application Name**.

Enabling this feature reduces the number of false positive New Relic alerts and allows for configured monitoring and alerts strictly for frontend performance. New Relic receives separate app data files with names of Application Name appended to Adminhtml and frontend. For example: MyStore\_Adminhtml

5. When complete, tap **Save Config**.

### Step 4: Enable Cron for New Relic Reporting

1. Expand ☯ the **Cron** section.



*Cron*

2. Set **Enable Cron** to "Yes".
3. When complete, tap **Save Config**.

## New Relic Queries

New Relic Insights data is based on statements that are written in New Relic Query Language (NRQL), as well as any custom parameters that you might include. Data can be returned from adhoc queries, or by queries saved to your dashboard. To learn more, see the [NRQL Reference](#) in the New Relic documentation.

### Admin Events

#### Active Admin Users

Widget Name: Active Admin Users

Description: Returns the number of active admin users.

```
SELECT uniqueCount(AdminId)
FROM Transaction
WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

#### Currently Active Admins

Widget Name: Currently Active Admins

Description: Returns the names of active admin users.

```
SELECT uniques(AdminName)
FROM Transaction
WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

### Recent Admin Activity

Widget Name: Recent Admin Activity

Description: Returns the number of recent admin actions.

```
SELECT count(AdminId)
FROM Transaction
WHERE appName = '<your_app_name>' FACET AdminName SINCE 1 day ago
```

### Latest Admin Activity

Widget Name: Latest Admin Activity

Description: Returns detail information about recent admin actions, including the admin username, duration, and application name.

```
SELECT AdminName, duration, name
FROM Transaction
WHERE appName='<your_app_name>' AND AdminName IS NOT NULL
AND AdminName != 'N/A' LIMIT 50
```

## Cron Events

### Category Count

Widget Name: Category Count

Description: Returns the number of application events by category during the specified time period.

```
SELECT average(CatalogCategoryCount)
FROM Cron
WHERE CatalogCategoryCount IS NOT NULL
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Catalog Count

Widget Name: Current Catalog Count

Description: Returns the average number of application events in the catalog by category during the specified time period.

```
SELECT average(CatalogCategoryCount)
FROM Cron
WHERE CatalogCategoryCount IS NOT NULL
AND CatalogCategoryCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Active Products

Widget Name: Active Products

Description: Returns the number of application events by product during the specified time period.

```
SELECT average(CatalogProductActiveCount)
FROM Cron
WHERE CatalogProductActiveCount IS NOT NULL
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Active Product Count

Widget Name: Active Product Count

Description: Returns the average number of active application events by product during the specified time period.

```
SELECT average(CatalogProductActiveCount)
FROM Cron
WHERE CatalogProductActiveCount IS NOT NULL
AND CatalogProductActiveCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Configurable Products

Widget Name: Configurable Products

Description: Returns the average number of application events for configurable products during the specified time period.

```
SELECT average(CatalogProductConfigurableCount)
FROM Cron
WHERE CatalogProductConfigurableCount IS NOT NULL
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Configurable Product Count

Widget Name: Configurable Product Count

Description: Returns the average number of application events by configurable product during the specified time period.

```
SELECT average(CatalogProductConfigurableCount)
FROM Cron
WHERE CatalogProductConfigurableCount IS NOT NULL
AND CatalogProductConfigurableCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Product Count (all)

Widget Name: Product Count (all)

Description: Returns the total number of application events for all products.

```
SELECT average(CatalogProductCount)
FROM Cron
WHERE CatalogProductCount IS NOT NULL
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Product Count (all)

Widget Name: Current Product Count (all)

Description: Returns the average number of application events for all products during the specified time period.

```
SELECT average(CatalogProductCount)
FROM Cron
WHERE CatalogProductCount IS NOT NULL
AND CatalogProductCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Customer Count

Widget Name: Customer Count

Description: Returns the average number of application events by customer.

```
SELECT average(CustomerCount)
FROM Cron
WHERE CustomerCount IS NOT NULL
AND CustomerCount > 0
AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Customer Count

Widget Name: Current Customer Count

Description: Returns the average number of customers during the specified time period.

```
SELECT average(CustomerCount)
FROM Cron
WHERE CustomerCount IS NOT NULL
AND CustomerCount > 0
AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Module Status

Widget Name: Module Status

Description: Returns the average number of times application modules are enabled, disabled, or installed during the specified time period.



```
SELECT average(ModulesDisabled), average(ModulesEnabled), average
(ModulesInstalled)
FROM Cron
WHERE appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Module Status

Widget Name: Current Module Status

Description: Returns the average number of times modules were enabled, disabled, or installed during the specified time period.

```
SELECT average(ModulesDisabled), average(ModulesEnabled), average
(ModulesInstalled)
FROM Cron
WHERE appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Website and Store Counts

Widget Name: Website and Store Counts

Description: Returns the average number of application events by website and store during the specified time period.

```
SELECT average(StoreViewCount), average(WebsiteCount)
FROM Cron
WHERE appName = '<your_app_name>' TIMESERIES 2 minutes
```

### Current Website and Store Counts

Widget Name: Current Website and Store Counts

Description: Returns the average number of current application events during the specified time period.

```
SELECT average(StoreViewCount), average(WebsiteCount)
FROM Cron
WHERE appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

### Cron - All Data from Event

Widget Name: Cron - All Data from Event

Description: Returns all application event data.

```
SELECT *
FROM Cron
WHERE appName = '<your_app_name>'
```

### Customers

#### Active Customer Count

Widget Name: Active Customer Count

Description: Returns the number of active customers during the specified time period.

```
SELECT uniqueCount(CustomerId)
FROM Transaction
WHERE appName = '<your_app_name>' SINCE 15 minutes ago
```

#### Active Customers

Widget Name: Active Customers

Description: Returns the names of active customers during the specified time period.

```
SELECT uniques(CustomerName)
FROM Transaction
WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

#### Top Customers

Widget Name: Top Customers

Description: Returns the top customers during the specified time period.

```
SELECT count(CustomerId)
FROM Transaction
WHERE appName = '<your_app_name>' FACET CustomerName SINCE 1 day ago
```

### Recent Admin Activity

Widget Name: Recent Admin Activity

Description: Returns a defined number of records of recent activity, that include the customername and duration of visit.

```
SELECT CustomerName, duration, name
FROM Transaction
WHERE appName='<your_app_name>'
AND CustomerName IS NOT NULL
AND CustomerName != 'N/A' LIMIT 50
```

### Orders

#### Number of Orders Placed

Widget Name: Number of Orders Placed

Description: Returns the number of orders placed during the specified time period.

```
SELECT count(`Order`)
FROM Transaction SINCE 1 day ago
```

#### Total Order Value

Widget Name: Total Order Value

Description: Returns the total number of line items ordered during the specified time period.

```
SELECT sum(LineItemCount)
FROM Transaction SINCE 1 day ago
```

#### Total Line Items Ordered

Widget Name: Total Line Items Ordered

Description: Returns the total number of line items ordered during the specified time period.

```
SELECT sum(LineItemCount)
```

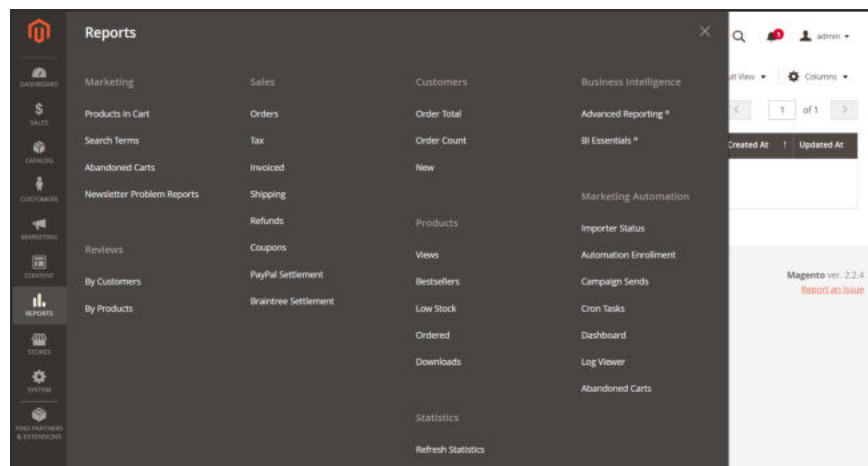
```
FROM Transaction SINCE 1 day ago
```



## CHAPTER 80:

# Marketing Automation

The Marketing Automation section of the Reports menu includes a wide selection of reports to help you track campaign activity and performance.



*Marketing Automation Reports*

### To access Marketing Automation reports:

1. On the Admin sidebar, choose **Reports**.
2. In the menu under **Marketing Automation**, choose one of the following reports:
  - Importer Status
  - Automation Enrollment
  - Campaign Sends
  - Cron Tasks
  - Dashboard
  - Log Viewer
  - Abandoned Carts

# OPERATIONS

## Stores

In this section of the guide, you'll learn how to set up a store hierarchy, create attributes, and manage the settings used by each store to calculate taxes, and currency rates.

### Stores Menu

#### All Stores

##### Adding Store Views

###### Editing a Store View

###### Adding a Language

###### Translating Products

###### Translating Content

##### Adding Stores

##### Adding Websites

##### Store URLs

###### Using a Custom Admin URL

#### Configuration

#### Taxes

##### General Tax Settings

###### Cross-Border Price Consistency

##### Tax Rules

###### Tax Classes

###### Configuring Tax Classes

###### Default Tax Destination

###### EU Place of Supply for Digital Goods

###### Fixed Product Tax

###### Configuring FPT

###### Price Display Settings

##### Tax Zones and Rates

###### Import/Export Tax Rates

##### Value Added Tax (VAT)

###### Configuring VAT

###### VAT ID Validation

###### Configuring VAT ID Validation

##### Tax Quick Reference

### International Tax Guidelines

#### U.S. Tax Guidelines

#### Canadian Tax Guidelines

#### EU Tax Guidelines

### Warning Messages

### Currency

#### Currency Configuration

#### Currency Symbols

#### Updating Currency Rates

### Attributes

#### Product Attributes

##### Creating an Attribute

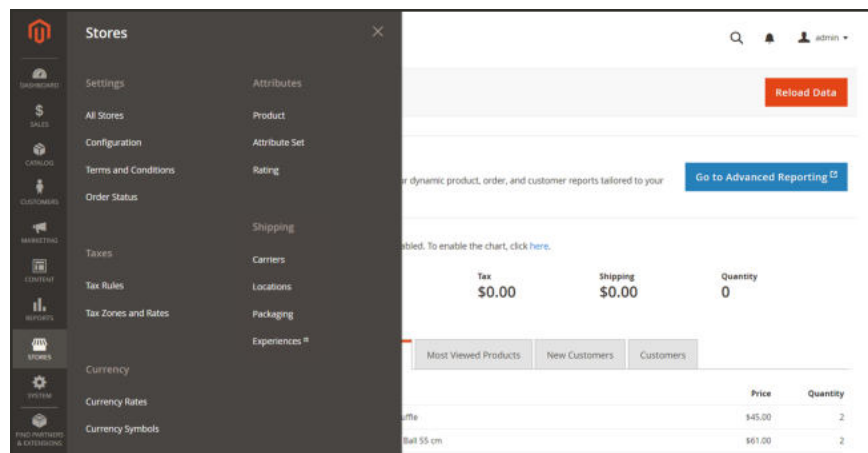
##### Attribute Sets



## CHAPTER 81:

# Stores Menu

The Stores menu manages settings that are used less frequently, but referenced throughout your Magento installation, including setting up the store hierarchy, configuration, sales and order settings, tax and currency, product attributes, product review ratings, and customer groups.

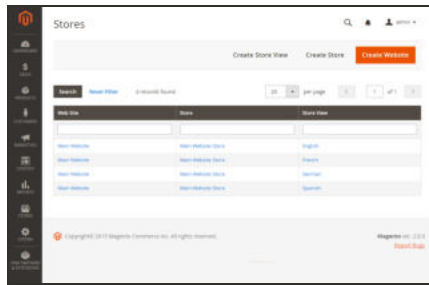


*Stores Menu*

### To display the Stores menu:

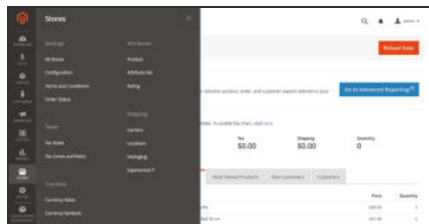
On the Admin sidebar, tap **Stores**.

## Menu Options



### All Stores

Manage the hierarchy of websites, stores and store views in your Magento installation, and all configuration settings. In addition, you can set up the Terms and Conditions of a sale, and manage order status settings.



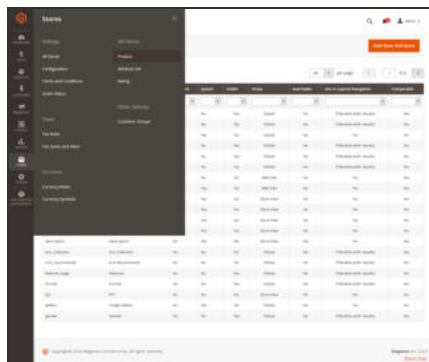
### Taxes

Set up the tax rules for your store, define customer and product tax classes, and manage tax zones and rates. You can also import tax rate data into your store.



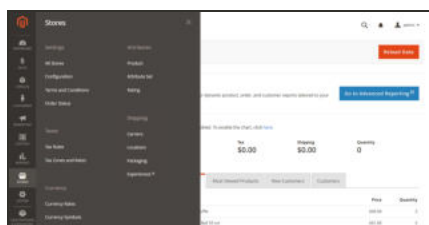
### Currency

Manage the rates for the currencies that are accepted as payment in your store, and customize the currency symbols that appear in product prices and sales documents.



### Attributes

Manage attributes that are used for product information and product ratings. You can create new attributes, edit existing attributes, and manage attribute sets.



### Shipping

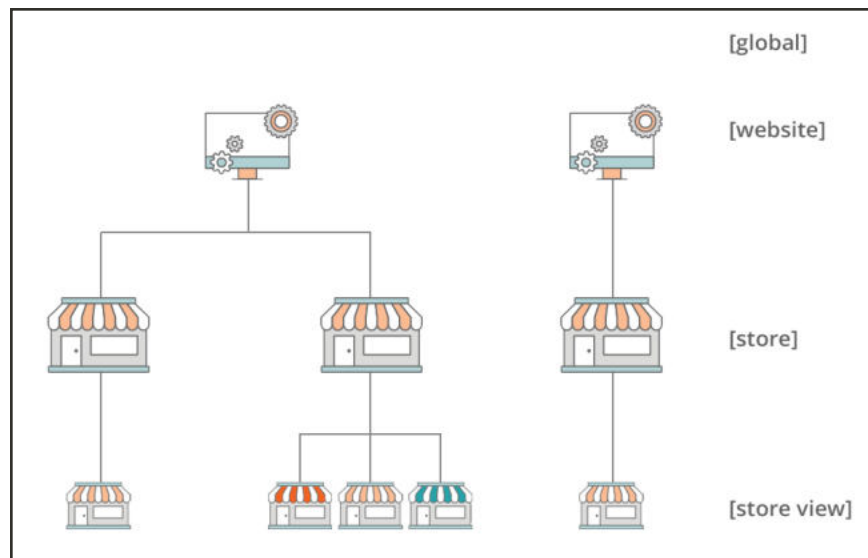
Manage the Carrier, Location, Packaging, and Experience profiles for Magento Shipping.

## CHAPTER 82:

# All Stores

When Magento Open Source is installed, a hierarchy that includes a main website, store, and store view is created. You can create additional websites, stores, and store views, as needed. For example, in addition to your main website, you might have a additional websites with a different domain. Within each website, you can have multiple stores, and within each store, separate store views. Many installations have one website and one store, but with multiple store views to support different languages.

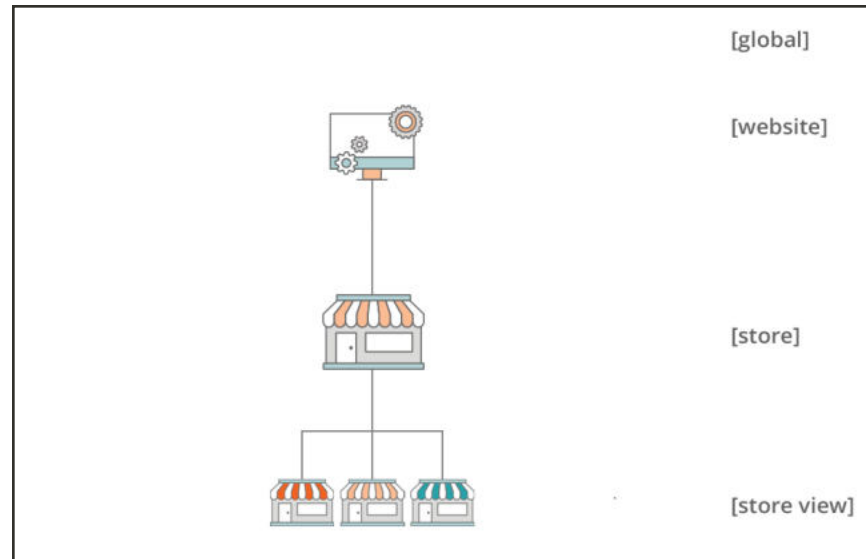
Before you begin, plan your store hierarchy in advance because it is referred to throughout the configuration. Each store can have a separate **root category**, which makes it possible to have an entirely different set of main menu options for each store.



*Store Hierarchy*

## Adding Store Views

Store views are typically used to make the store available in different **locales**. Shoppers can use the language chooser in the header of the store to change the store view.



*Multiple Store Views*

### To create a new store view:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.

The screenshot shows the 'Stores' page in the Magento Admin. The page has a sidebar with navigation options: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area shows a table with columns for Web Site, Store, and Store View. The table contains four rows of data for the Main Website, each with a different language (English, French, German, Spanish). The page also includes a top navigation bar with search and user information.

Web Site	Store	Store View
Main Website	Main Website Store	English
Main Website	Main Website Store	French
Main Website	Main Website Store	German
Main Website	Main Website Store	Spanish

*All Stores*

2. Tap **Create Store View**. Then, do the following:

Store View Information

Store \* Main Website Store ▼

Name \*

Code \*

Status \* Disabled ▼

Sort Order

*Store View Information*

- a. Set **Store** to the parent store of this view.
  - b. Enter a **Name** for this store view. The name appears in the language chooser in the store header. For example: Spanish.
  - c. Enter a **Code** in lowercase characters to identify the view. For example: spanish.
  - d. To activate the view, set **Status** to “Enabled.”
  - e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.
3. When complete, tap **Save Store View**.

## Editing a Store View

Because the view name appears in the language chooser, you might eventually want to change the name of the default view to something more descriptive. The Name field is simply a label, and can be easily changed.

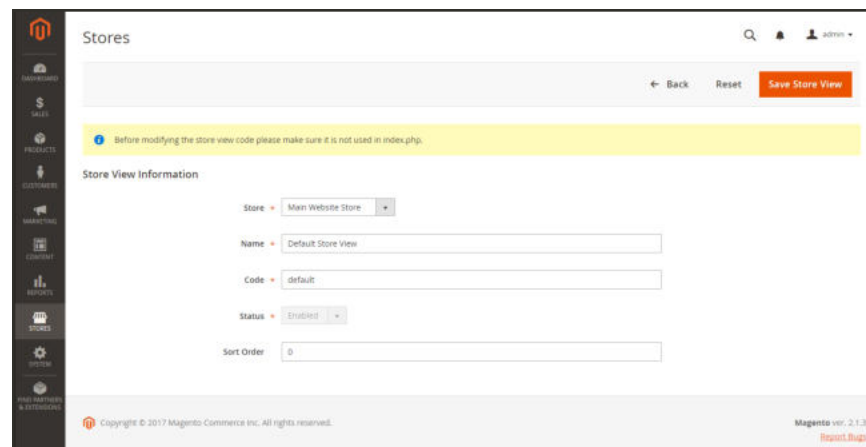
If your Magento installation has a multisite or multistore setup, do not change the store Code field without verifying that the value is not referenced in the `index.php` file. If you do not have access to the server to examine the file, ask a developer for help.

FIELD	ORIGINAL VALUE	UPDATED VALUE
Name	Default Store View	English
Code	default	english

### To edit a store view:

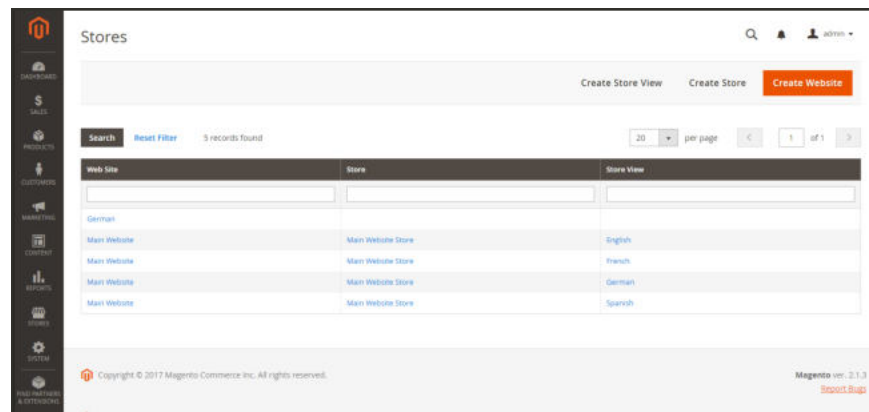
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. In the **Store View** column of the grid, click the name of the view that you want to edit.

When editing the default view, the Store and Status fields are not available.



*Editing the Default View*

3. Update the following fields as applicable:
  - Store (non-default views only)
  - Name
  - Code (only if not used in `index.php`)
  - Status (non-default views only)
  - Sort Order
4. When complete, tap **Save Store View**.



*Stores*

## Adding a Language

Most of the text that appears to be hard-coded on pages throughout your store can be instantly changed to a different language by changing the locale of the view. Changing the locale doesn't actually translate the text word-for-word, but simply references a different translation table that provides the interface text that is used throughout the store. The text that can be changed includes navigational titles, labels, buttons, and links such as "My Cart" and "My Account." You can also use the [Inline Translation](#) tool to touch up text in the interface.

Language packs can be found under "[Translations & Localization](#)" on Magento Marketplace. New extensions are continually added to Marketplace, so check back often!

### Step 1: Install a Language Pack


Follow the standard instructions to install the language pack extension from [Extensions Manager](#) or [Module Manager](#).

### Step 2: Create a Store View for the Language

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store View**. Then, do the following:
  - a. Choose the **Store** that is the parent of the view.
  - b. Enter a **Name** for the store view. For example: Portuguese.  
In the header of the store, the name appears in the "language chooser."
  - c. Enter a **Code** in lowercase characters to identify the view. For example: portuguese.
  - d. To activate the view, set **Status** to "Enabled."
  - e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.
3. When complete, tap **Save Store View**.



### Step 3: Change the Locale of the Store View

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-left corner, set **Store View** to the specific view where the configuration is to apply. When prompted to confirm scope switching, tap **OK**.
3. Expand  the **Locale Options** section.
4. Clear the **Use Website** checkbox after the Locale field. Then, set **Locale** to the language that you want to assign to the view.

If there are several variations of the language available, make sure to choose the one for the specific region or dialect.

5. When complete, tap **Save Config.**

After you change the language of the locale, the remaining content that you have created, including **product** names and descriptions, categories, **CMS** pages, and blocks must be translated separately for each store view.

## Translating Products

If your store has **multiple views** in different languages, the same products are available in each store view. You can use the same basic product information, such as SKU, price, and inventory level, regardless of language. Then, translate only the product name, description fields, and meta data as needed for each language.

### Process Overview:

Step 1: [Translate Product Fields](#)

Step 2: [Translate Field Labels](#)

Step 3: [Translate All Categories](#)

### Step 1: Translate Product Fields

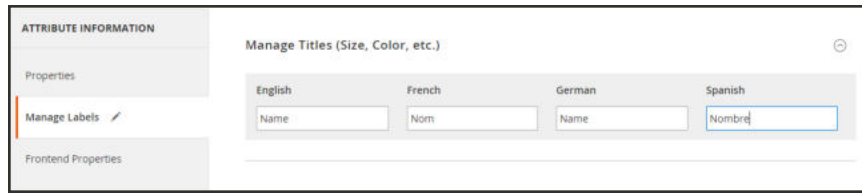
1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
2. In the grid, find the product to be translated, and open in edit mode.
3. In the upper-left corner set **Store View** to the view for the translation. When prompted to confirm, tap **OK**.
4. For each field to be edited, do the following:
  - a. Clear the **Use Default Value** checkbox to the right of the field.
  - b. Either paste or type the translated text into the field.

Make sure to translate all text fields, including **image** labels and Alt text, **Search Engine Optimization** fields and any **Custom Options** information.

5. When complete, tap **Save**.

### Step 2: Translate Field Labels

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. In the list, find the attribute to be translated, and open in edit mode.
3. In the panel on the left, choose **Manage Labels**.
4. In the **Manage Titles** section, enter a translated label for each store view.



*Enter Translated Labels*

5. When complete, tap **Save Attribute**.

### Step 3: Translate All Categories

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. In the upper-left corner set **Store View** to the view for the translation. When prompted to confirm, tap **OK**.
3. In the tree, find the category to be translated and open in edit mode.
4. On the **General Information** tab, translate the following fields:
  - Name
  - Description
  - Page Title
  - Meta Keywords
  - Meta Description
5. To translate the **URL Key**, do the following:
  - a. Clear the **Use Default Value** checkbox to the right of the field.
  - b. Enter the translated text.
  - c. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected



*Translate URL Key*

6. When complete, tap **Save Category**.
7. Repeat the process for all categories used in the store.

## Translating Content

If your store has **multiple views** in different **languages**, and you have set the locale for each view to a different language, the result is a partially translated site. The next step is to create a translated version of each page that is available from the specific store view. The Store View column of the Manage Pages list shows each view that has a translated version of the page.

To translate a content page, you must create a new page that has the same URL Key as the original, but is assigned to the specific store view. Then, update the page for the specific view with the translated text. The following example shows how to create a translated version of the “About Us” page for the Spanish store view.

### To create a translated page for a view:

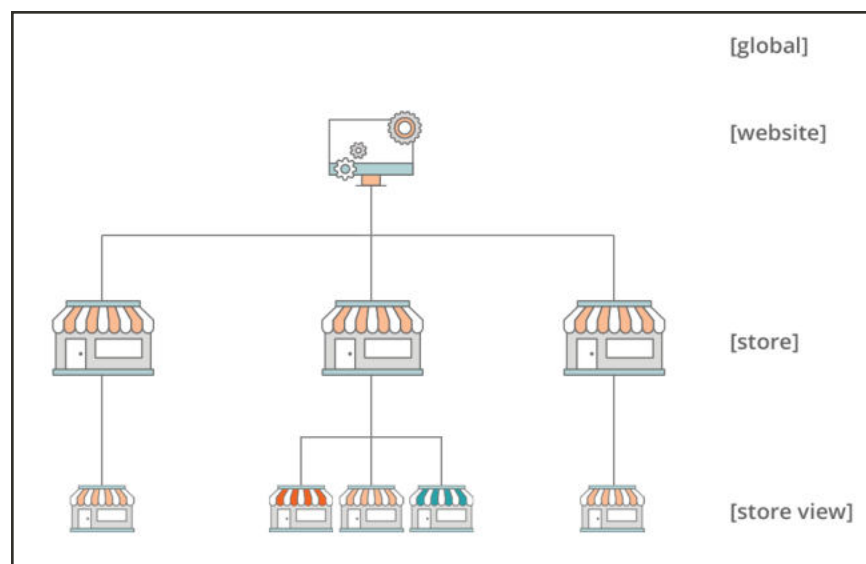
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. In the grid, find the page to be translated, and open in edit mode.
3. Copy the **URL Key** to the clipboard. Then, press the **Back** button to return to the Pages grid.
4. Tap **Add New Page**. Then, do the following:
  - a. Enter the translated **Page Title**.
  - b. Paste the **URL Key** that you copied from the original page.
  - c. In the **Store View** box, choose the store view where the page is to be available.
  - d. In the panel on the left, choose **Content**. Then, complete the translated text for the page.
  - e. On the **Design** tab, set the column **Layout** of the page.
  - f. On the **Meta Data** tab, enter the translated text for the **Keywords** and **Description**.
5. When complete, tap **Save Page**. Then when prompted, refresh any invalid **caches**.
6. To verify the translation, go to the storefront and use the language chooser to change the store view.

Notice that there are still some elements on the page that need to be translated, including the company footer links **block**, the **welcome message**, and **product information**.

## Adding Stores

A single installation of Magento can have multiple stores that share the same Admin. Stores that are under the same website have the same IP address and domain, use the same security certificate, and share a single checkout process.

The important thing to understand is that the stores use the same Magento code, and share the same Admin. Each store can have a separate catalog, or share the same catalog. Each store can have a separate **root category**, which makes it possible to have a different main menu for each store. Stores can have different branding, presentation, and content. Before you begin, take some time to plan your store hierarchy with future growth in mind, because it is used throughout the configuration.



*Multiple Stores*

Here are some examples of how URLs can be configured for multiple stores:

`yourdomain.com/store1`    Each store has a different path, but shares the same domain.  
`yourdomain.com/store2`

`store1.yourdomain.com`    Each store has a different subdomain of the primary domain.  
`store2.yourdomain.com`

### Process Overview:

- Step 1: **Choose the Store Domain**
- Step 2: **Create the New Store**
- Step 3: **Create a Default Store View**
- Step 4: **Configure the Store URL**

## Step 1: Choose the Store Domain

The first step is to choose how you want to position the store. Will the stores share the same domain, each have a subdomain, or have distinctly different domains? For each store, do one of the following:

- To place the store one level below the primary domain, you don't have to do anything.
- Set up a subdomain of your primary domain.
- Set up a different primary domain.

## Step 2: Create the New Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store**. Then, do the following:
  - a. Choose the **Web Site** that is to be the parent of the new store. If the installation has only one web site, accept the default, "Main Website."
  - b. Enter a **Name** for the new store. The name is for internal reference only.
  - c. Enter a **Code** in lowercase characters to identify the store. For example: mainstore.
  - d. Set **Root Category** to the **root category** that defines the category structure for the main menu of the new store. If you have already created a specific root category for the store, select it. Otherwise, select "Default Category." You can come back later and update the setting.

Store Information

Web Site \* Main Website ▾

Name \*

Code \*

Root Category \* -- Please Select a Category -- ▾

*Store Information*

3. When complete, tap **Save Store**.

Web Site	Store	Store View
<input type="text"/>	<input type="text"/>	<input type="text"/>
Main Website	Main Website Store	English
Main Website	Main Website Store	French
Main Website	Main Website Store	German
Main Website	Main Website Store	Spanish
Main Website	Outlet Store	

*New Store*

### Step 3: Create a Default Store View

1. Tap **Create Store View**. Then, do the following:
  - a. Set **Store** to the new store you created.
  - b. Enter a **Name** for the view. For example, "English."
  - c. Enter a **Code** for the view in lowercase characters.
  - d. Set **Status** to "Enabled."
  - e. In the **Sort Order** field, enter a number to determine the store's position when listed with other stores.
2. Tap **Save Store View**.

If you were to open your store in edit mode, you would see that it now has a default view.

**Store Information**

Web Site \*

Name \*

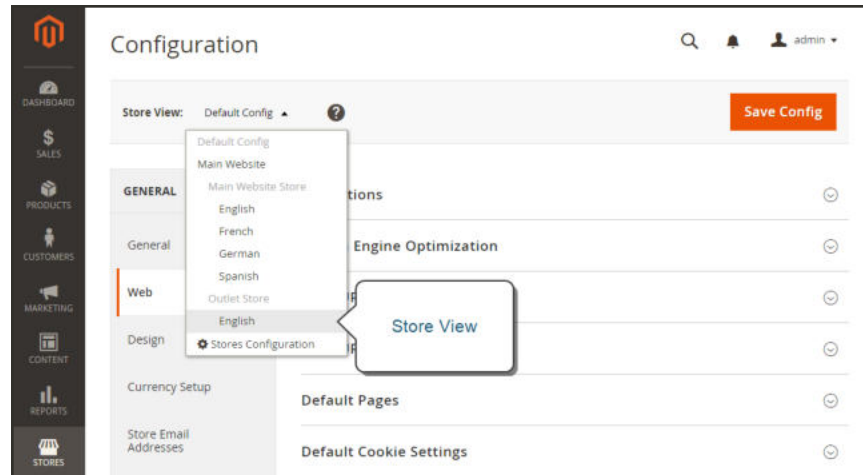
Root Category \*

Default Store View


*New Store with Default View*

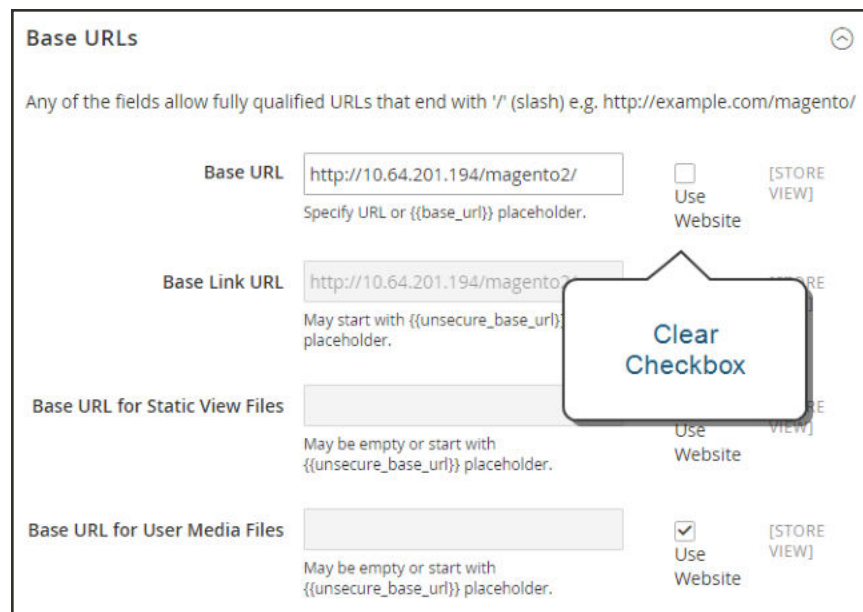
### Step 4: Configure the Store URL

1. On the menu bar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. In the upper-left corner, set **Store View** to the view that you created for the new store. When prompted to confirm **scope** switching, tap **OK**.




*Choose the New Store View*

4. Expand  the **Base URLs** section. Then, do the following:
  - a. After the Base URL field, clear the **Use Website** checkbox.
  - b. Enter the **Base URL** for the store.



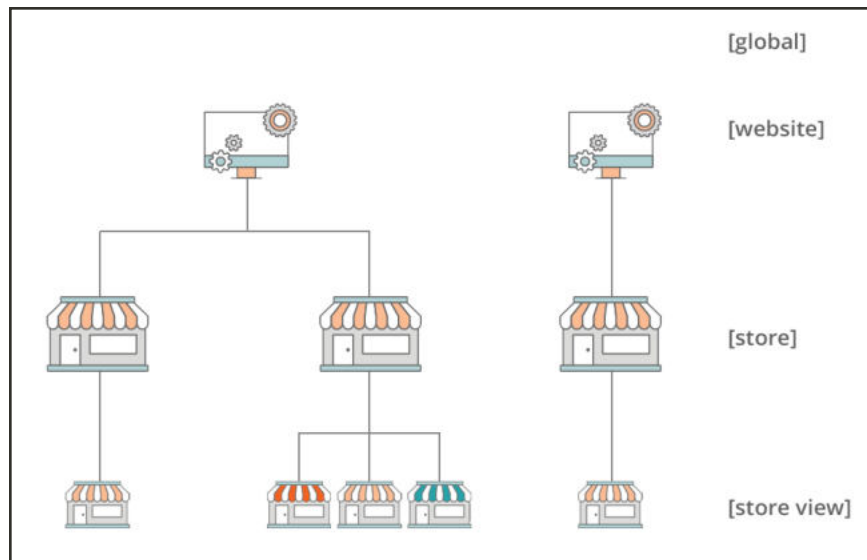
*Base URLs*

5. Expand  the **Secure Base URLs** section, and repeat the previous step as needed to configure the store's **secure URL**.
6. When complete, tap **Save Config**.



## Adding Websites

Multiple websites can be set up that use the same Magento installation. The websites can be set up to use the same domain, or different domains. If you want each store to have a dedicated checkout process under its own domain, each store must have a distinct IP address and separate security certificate.



Multiple Websites

### Step 1: Create a New Website

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **All Stores**.
2. Tap **Create Website**. Then, do the following:

Website Information

- a. In the **Name** field, enter the domain of the new website. For example, “domain.com.”
  - b. Enter a **Code** that will be used on the server to point to the domain.  
The code must begin with a lowercase (a-z) letter, and can include any combination of letters (a-z), numbers (0-9), and the underscore ( \_ ) symbol.
  - c. (Optional) Enter a **Sort Order** number to determine the sequence in which this site is listed with other sites. Enter a zero to make this site appear at the top of the list.
  - d. Set **Default Store** to the store that is to be used as the default for this website.
3. When complete, tap **Save Website**.
  4. Set up each **store** and **store view** that is needed for the new website.

### Step 2: Configure the Store URL

Follow the instructions to configure the **store URLs**.

## Store URLs

Each website in a Magento installation has a base URL that is assigned to the storefront, and another URL that is assigned to the Admin. Magento uses variables to define internal links in relation to the base URL, which makes it possible to move an entire store from one location to another without updating the links. Standard base URLs begin with `http`, and secure base URLs begin with `https`.

Base URL	<code>http://www.yourdomain.com/magento/</code>
Secure Base URL	<code>https://www.yourdomain.com/magento/</code>
URL with IP address	<code>http://###.###.###.###/magento/</code> <code>https://###.###.###.###/magento/</code>

**Important!** Do not change the Admin URL from the default Base URL configuration. To change the Admin URL or path, see: [Using a Custom Admin URL](#).

## Use Secure Protocol

The base URLs for your store were initially set up during the Web Configuration step of the [Magento installation](#). If a security certificate was available at the time, you could specify for secure (`https`) URLs to be used for the store, Admin, or both. If your Magento installation includes multiple stores, or if you plan to later add more stores, you can include the store code in the URL. All Magento resources and operations can be used with secure protocol.

If a security certificate wasn't available for the domain at the time of the installation, make sure to update the configuration before launching your store. After a security certificate is established for your domain, you can configure either or both base URLs to operate with encrypted Secure Sockets Layer (SSL) and [Transport Layer Security](#) (TLS) protocol.

Magento strongly recommends for all pages of a production site, including content and product pages, to be transmitted with secure protocol.

Magento can be configured to deliver all pages over `https` by default. If your store has been running up until now with standard protocol, you can improve security by enabling [HTTP Strict Transport Security](#) (HSTS). and by upgrading any insecure page requests that are received by the store. HSTS is an opt-in protocol that prevents browsers from rendering standard `http` pages that are transmitted with unsecure protocol for the specified domain. Because search engines might have already indexed each page of your store with standard `http` URLs, you can configure Magento to automatically upgrade any unsecure page requests to `https`, so you don't lose any traffic. When Magento is configured to use secure URLs for both the store and Admin, two additional fields appear that allow you to enable HSTS.

### To configure the base URL:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand ☺ the **Base URL** section, and do the following:
  - a. Enter the fully qualified **Base URL** for your store. Make sure to end the URL with a forward slash, so it can be extended with additional URL Keys from your store. For example:

```
http://yourdomain.com/
```

Do not change the placeholder in the **Base Link URL** field. It is a placeholder that is used to create relative links to the base URL.

- b. (Optional) To specify an alternate location for the **Base URL for Static View Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

- c. (Optional) To specify an alternate location for the **Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

For a typical installation, there is no need to update the paths for the static view files or media files because they are relative to the base URL.

### Base URLs

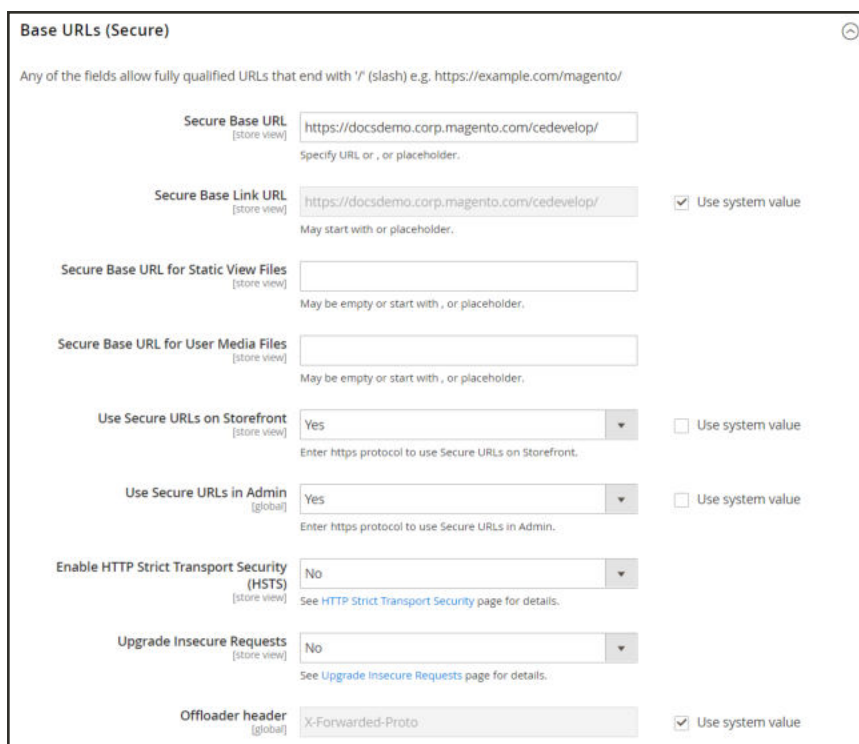
Placeholders enclosed in double braces are markup tags for variables.

4. When complete, tap **Save Config**.

### To configure the secure base URL:

If your domain has a valid security certificate, you can configure the URLs of both the storefront and Admin to transmit data over a secure (https) channel. Without a valid security certificate, your store cannot operate with secure (SSL/TLS) protocol.

1. Expand ☺ the **Base URLs (Secure)** section. Then, do the following:



#### Base URLs (Secure)

- a. Enter the full **Secure Base URL**, followed by a forward slash. For example:

https://yourdomain.com/

- b. Do not change the placeholder in the **Secure Base Link URL** field. It is used to create relative links to the secure base URL.
- c. (Optional) To specify an alternate location for the **Secure Base URL for Static View Files**, enter the path starting with the following placeholder:

{{secure\_base\_url}}

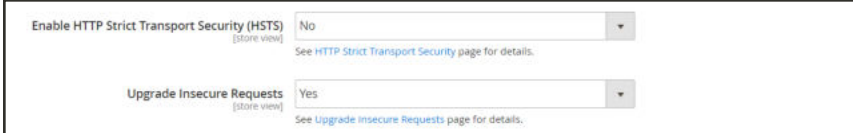
- d. (Optional) To specify an alternate location for the **Secure Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{secure_base_url}}
```

2. To enhance security, set both of the following options to "Yes."

- Use Secure URLs on Storefront
- Use Secure URLs in Admin

When the following additional fields appear , do the following:



The screenshot shows two configuration options in a list:

- Enable HTTP Strict Transport Security (HSTS)** (store view): Set to **No**. Below the dropdown is the text: "See HTTP Strict Transport Security page for details."
- Upgrade Insecure Requests** (store view): Set to **Yes**. Below the dropdown is the text: "See Upgrade insecure Requests page for details."

*Enhanced Security Settings*

- a. If you want your store to display only secure https page requests, set **Enable HTTP Strict Transport Security (HSTS)** to "Yes."
  - b. To upgrade any requests for standard unsecured http pages to secure https, set **Upgrade Insecure Requests** to "Yes."
3. When complete, tap **Save Config**.

### To include the store code in URLs:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand ☰ the **URL Options** section.
4. Set **Add Store Code** to your preference.

#### URL with Store Code

```
http://www.yourdomain.com/magento/[store-code]/index.php/url-identifier
```

#### URL without Store Code

```
http://www.yourdomain.com/magento/index.php/url-identifier
```



#### URL Options

5. When complete, tap **Save Config**.
6. After the setting is saved, you will be prompted to refresh the cache. Tap the **Cache Management** link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.



#### Refresh Cache

### Troubleshooting

If after following the configuration instructions, some pages continue to be served with the unsecure URL (`http://`), do the following:

- Change the (unsecure) base URL to the secure (`https://`) URL.
- On the server, edit the `.htaccess` file (or load balancer) so the unsecure URL is redirected to the secure URL.

## Using a Custom Admin URL

As a **security best practice**, Magento recommends that you use a unique, custom Admin URL instead of the default “admin” or a common term such as “backend”. Although it will not directly protect your site from a determined bad actor, it can reduce exposure to scripts that try to gain unauthorized access.

Check with your hosting provider before implementing a custom Admin URL. Some hosting providers require a standard URL to meet firewall protection rules.

In a typical Magento installation, the Admin URL and path is immediately below the Magento base URL. The path to the store Admin is one directory below the root.

### Default Base URL

```
http://yourdomain.com/magento/
```


### Default Admin URL and Path

```
http://yourdomain.com/magento/admin
```

Although it is possible to change the Admin URL and path to another location, any mistake removes access to the Admin, and must be corrected from the server.

As a precaution, do not try to change the Admin URL by yourself unless you know how to edit configuration files on the server.

### Method 1: Change from the Magento Admin

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**.
3. Expand  the **Admin Base URL** section. Then, do the following:
  - a. Clear the first **Use system value** checkbox. Then, set **Use Custom Admin URL** to “Yes”.
  - b. Clear the next **Use system value** checkbox. Then, enter the **Custom Admin URL** in the following format:

```
http://yourdomain.com/magento/
```

**Important!** The Admin URL must be in the same Magento installation, and have the same document root as the storefront.

- c. Clear the next **Use system value** checkbox. Then, set **Custom Admin Path** to “Yes”.



- d. Clear the next **Use system value** checkbox. Then, enter the **Custom Admin Path**.

The path that you enter is appended to the Custom Admin URL after the last forward slash.

```
sample_custom_admin
```

### Admin Base URL

- When complete, tap **Save Config**.
- After the changes are saved, **Sign Out** of the Admin. Then, log back in using the new Admin URL and path.

## Method 2: Change from the Server Command Line

- Open the `app/etc/env.php` file in a text editor, and change the name of the `[admin]` path. Make sure to use only lowercase characters. Then, save the file.

On the server, the admin path is located in the `app/etc/env.php` file. Look for the `<adminhtml>` argument in the `<admin>` section:

#### Default Admin Path

```
# <frontName><![CDATA[admin]]></frontName>
```

#### New Admin Path

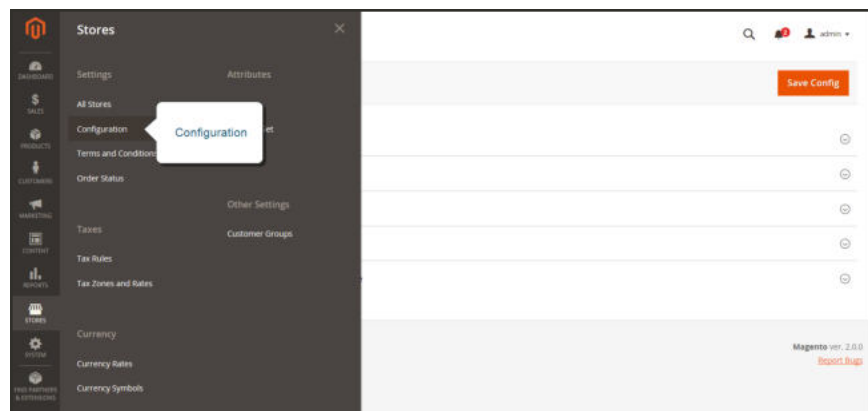
```
# <frontName><![CDATA[backend]]></frontName>
```

- Use one of the following methods to clear the Magento cache:
  - On the Admin sidebar, tap **System**. Under **Tools**, choose **Cache Management**. Then, tap **Flush Magento Cache**.
  - On the server, navigate to the `var/cache` folder, and delete the contents of the cache folder.



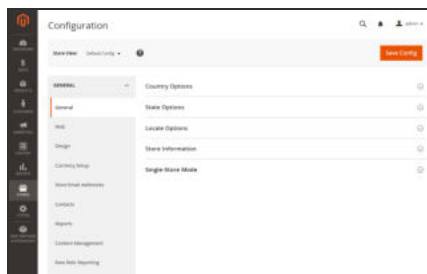
## CHAPTER 83: Configuration

The online [Configuration Reference](#) has field descriptions for every configuration setting in Magento Open Source. To learn how to apply configuration settings to specific store views, see: [Scope](#).



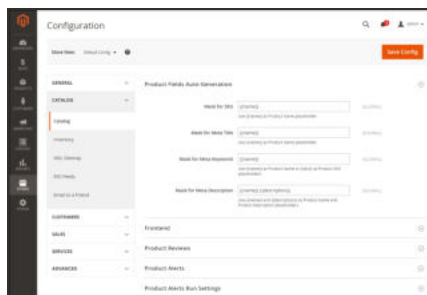
*Configuration*

## Configuration Tabs



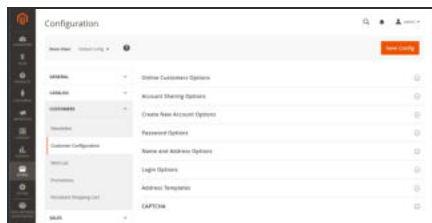
### General

Includes basic configuration settings for the store, URLs, theme, currency, email addresses, store contacts, editor, and dashboard reports.



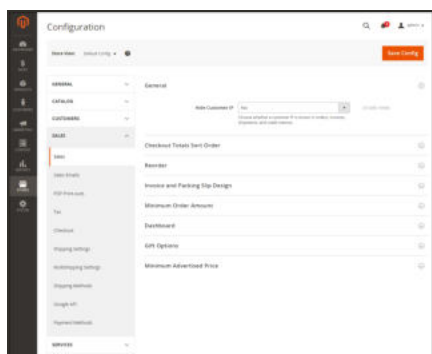
### Catalog

Determines product and inventory settings, controls sitemap and RSS feed generation, and specifies the email template that is used to share products with friends.



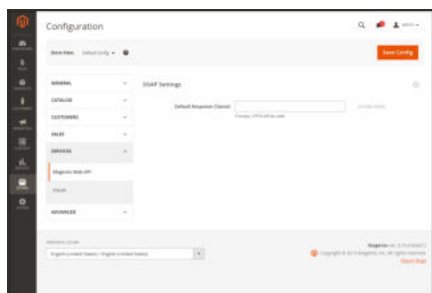
## Customers

Establishes basic customer account and login options, newsletter settings, wish list, and the format of auto-generated coupon codes.



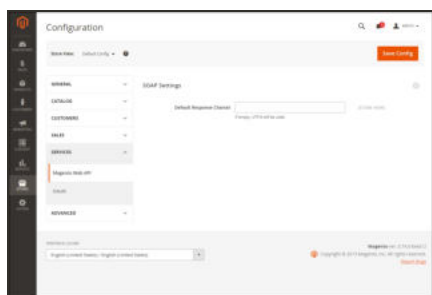
## Sales

Determines checkout and tax settings, payment and shipping options, sales email and PDF print-outs, and Google API settings.



## Services

Configures Magento API settings, including SOAP and OAuth.



## Advanced

Determines default Admin settings, various system configuration settings, advanced module controls, and developer tools (if the store is running in **developer mode**).



## CHAPTER 84:

# Taxes

In this section of the guide, you will learn how to set up taxes according to the requirements of your locale. You can set up tax classes for products and customer groups, and create tax rules that combine product and customer classes, tax zones, and rates. In addition, you'll learn more advanced topics such as setting up fixed product taxes, compound taxes, and how to display consistent prices across international borders. If you are required to collect a value-added tax, you will learn how to set up your store to automatically calculate the appropriate amount with validation.

Magento provides a variety of options to define taxes. Tax classes are used to define “tax rules.” Tax rules are a combination of a Product Class, a Customer Class and a Tax Zone and Rate. Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union.

## Vertex Cloud

Vertex is a cloud-based solution that automates your sales and use tax compliance, and generates a signature-ready PDF for your monthly returns. To get started, you need a Vertex account, then complete configuration settings.

The integration includes tax configuration for your stores, overrides per country, and performance enhancing options.

### Changes In the Latest Release

#### Release 2.3.1

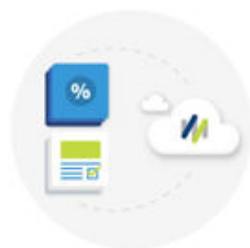
##### New Features

##### Updated configuration options:

- New Use Vertex Tax Links configuration option. Required to enable and configure Vertex. This option increases integration performance.
- Integration URLs automatically update to use new service links. The Vertex Calculation API URL connects to CalculateTax70, and Vertex Address Validation API URL links to LookupTaxAreas70.
- Renamed Shipping Product Codes to Vertex Shipping Product Codes. These features display products for each shipping type enabled. Map your shipping types to Vertex in this section.
- New Delivery Terms options for configuring global and overrides per country for shipping terms. These options provide support to EU VAT.
- New Vertex Logging configuration options for rotating logs. Set the frequency, actions, and exact timing for the rotation. Logs export to a .csv file.

**Automatic API disabling:** If you update your product prices in the Magento catalog to include tax, this can significantly degrade Magento performance. Vertex will automatically disable if **Display prices in Catalog** is set to Including Tax. You must set this value to Excluding Tax to re-enable Vertex.

**New Cache Option:** When clearing caches using **Cache Management**, Vertex has a cache option included. This option improves performance during the checkout process.



### Automate Tax Calculations & Returns

Vertex saves time, reduces risk, and helps you file your tax returns on time.



## Sales & Use Tax

---

Vertex Cloud calculates sales tax in the shopping cart based on the tax profile of each product that is purchased, and the jurisdiction.



## Manage Exception Certificates

---

Vertex makes it easy to manage customers by jurisdiction who have non-standard tax requirements.



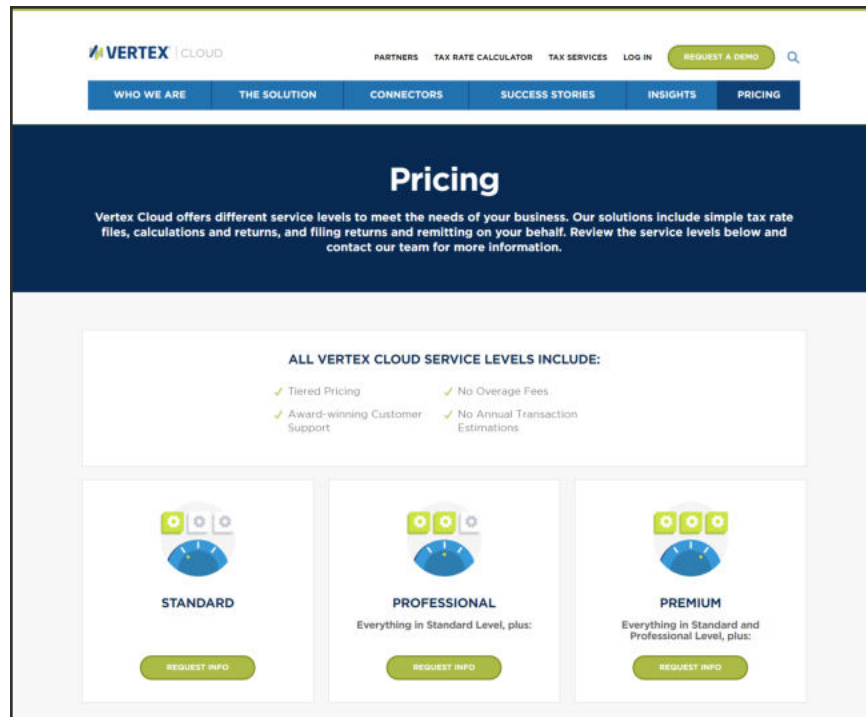
## Generate Returns

---

Vertex Cloud automatically regenerates signature-ready PDF returns and sends a message when the returns are available.

## Your Vertex Account

Vertex offers three pricing plans, plus access to additional services. All Vertex accounts include tiered pricing and award-winning customer support, but without extra fees for fees or annual transaction estimations. Don't hesitate to contact Vertex if you need help choosing the right **pricing plan** for your business. Then, sign up for an account on Vertex Cloud.



*Pricing*



### To sign up for a Vertex account:

1. Visit the **Vertex** web site to learn more about their services and pricing. Then in the menu at the top of the page, choose **Pricing**.
2. Choose the pricing plan you want, and tap **Request Info**.

Vertex Cloud is available to companies located in the U.S. or Canada.

3. You will receive an email with a link to register your Vertex Cloud account. Click the link, and complete the registration as follows:
  - a. Enter your **Username**, **Password**, and **Password Confirmation**.

Your username and password are case sensitive. Make sure to write them down for future reference.
  - b. Complete the fields in the **Company Information** section.
  - c. Complete the fields in the **Contact Information** section.
  - d. To continue, mark the **I agree to the terms of service** checkbox.
4. Under **Subscription Information**, choose one of the following **Subscription Levels**, according to your pricing plan.
  - Standard
  - Professional
  - Premium

Then, mark the checkbox of any optional features and services that you want to add to your account.

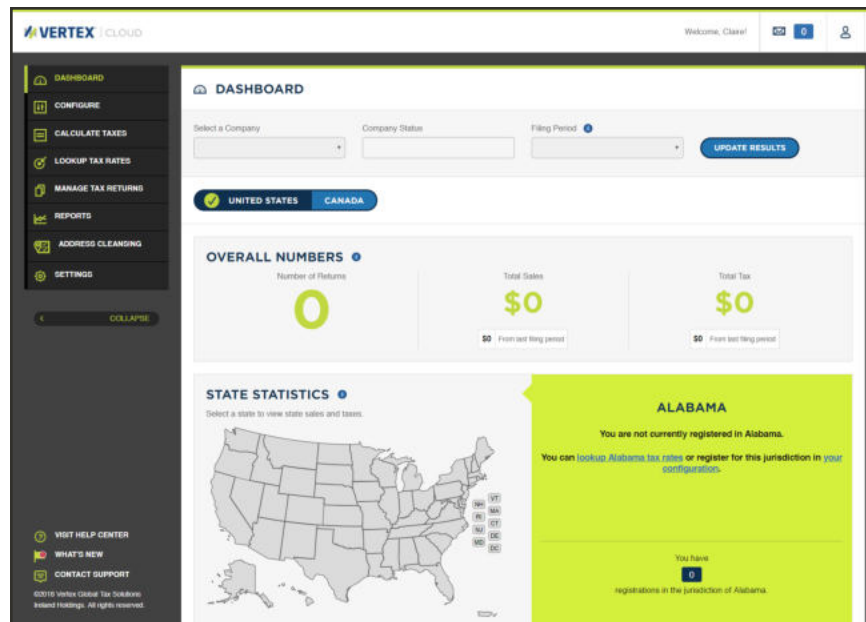
5. Under **Billing Information**, do the following:
  - a. Complete your **Billing Address**.

Your company's billing address is required if paying by credit card, and must be located in either the U.S. or Canada.

- b. Choose the **Payment Method** that you want to use. Then, complete the required information.
6. To complete the process, tap **Submit Billing Information & Finish**.

Some of our instructions include links for more information in the Vertex Cloud Help Center. You must be logged in to your account to gain access to the Vertex Cloud Help Center.

See the instructions in the [online user guide](#) to complete both the Vertex Cloud and Magento configuration.



*Vertex Cloud Dashboard*

## General Tax Settings


The following instructions take you through the basic tax configuration for your Magento installation. Before setting up your taxes, make sure that you are familiar with the tax requirements of your **locale**. Then, complete the tax configuration according to your requirements.


Admin **permissions** can be set to restrict access to **tax resources**, based on the business “need to know.” To create an Admin role with access to tax settings, choose both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default shipping point of origin, you must also allow access to the System/Shipping resources for the role. The shipping settings determine the store tax rate that is used for catalog prices.

### To configure the general tax settings:

1. On the Admin sidebar, choose **Stores**. Then under Settings, choose **Configuration**.
2. For a multisite configuration, set **Store View** to the website and store that is the target of the configuration.
3. Complete the following configuration settings. If necessary, clear the **Use System value** checkbox of any settings that are grayed out.

### Tax Classes

1. In the panel on the left under **Sales**, choose **Tax**.
2. Expand  the **Tax Classes** section. Then, do the following:



Setting	Value	Use system value
Tax Class for Shipping (website)	None	<input checked="" type="checkbox"/>
Default Tax Class for Product (global)	Taxable Goods	<input checked="" type="checkbox"/>
Default Tax Class for Customer (global)	Retail Customer	<input checked="" type="checkbox"/>

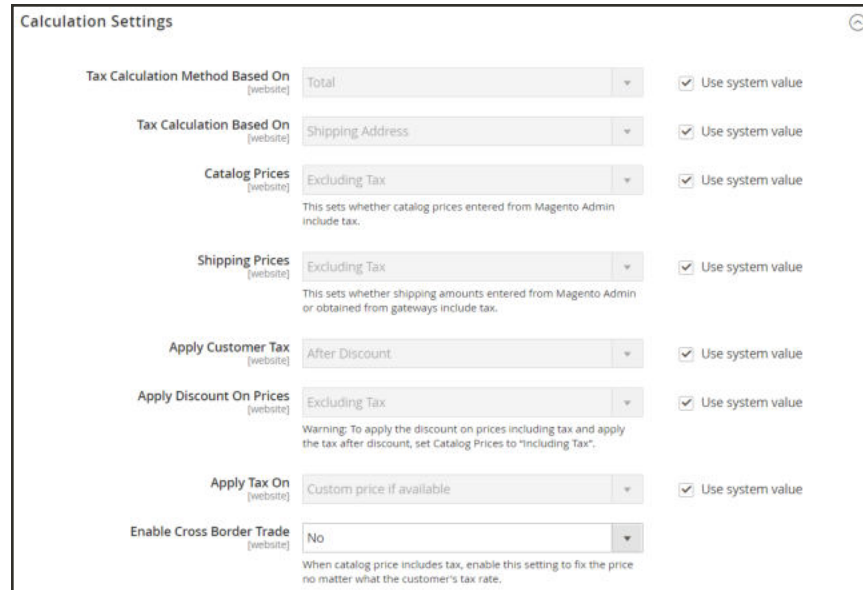
#### *Tax Classes*

- a. Set **Tax Class for Shipping** to the appropriate class. The default classes are:
  - None
  - Taxable Goods
- b. Set **Default Tax Class for Product** to the appropriate class. The default classes are:
  - None
  - Taxable Goods
- c. Set **Default Tax Class for Customer** to the appropriate class. The default class is:

- Retail Customer
  - Wholesale Customer
3. When complete, tap **Save Config.**

### Calculation Settings

1. Expand the **Calculation Settings** section. Then, do the following:



### Calculation Settings

- a. Set **Tax Calculation Method Based On** to one of the following:
 


Unit Price	The price of each product.
Row Total	The total of the line item in the order, less discounts.
Total	The order total
- b. Set **Tax Calculation Based On** to one of the following:
 

Shipping Address	The address where the order is to be shipped.
Billing Address	The billing address of the customer.
Shipping Origin	The address that is specified as the <b>point of origin</b> for your store.
- c. Set **Catalog Prices** to one of the following:
  - Excluding Tax
  - Including Tax

- d. Set **Shipping Prices** to one of the following:
  - Excluding Tax
  - Including Tax
- e. Set **Apply Customer Tax** to one of the following to determine whether tax is applied to the original or discounted price.
  - After Discount
  - Before Discount
- f. Set **Apply Discount on Prices** to one of the following to determine if discounts include or exclude tax.
  - Excluding Tax
  - Including Tax
- g. Set **Apply Tax On** to one of the following:
  - Custom price if available
  - Original price only
- h. Set **Enable Cross-Border Trade** to one of the following:
 

Yes	Use consistent pricing across different tax rates. If the catalog price includes tax, choose this setting to fix the price regardless of the customer's tax rate.
No	Vary the price by tax rate.

**Important!** If **cross-border trade** is enabled, the profit margin changes by tax rate. Profit is determined by the formula (Revenue - CustomerVAT - CostOfGoodsSold). To enable cross-border trade, prices must be set to include tax.

2. Expand  the **Default Tax Destination Calculation** section. Then, specify the country that is to be the default for tax calculations.

**Default Tax Destination Calculation** 

Default Country [store view]   Use system value

Default State [store view]   Use system value

Default Post Code [store view]

*Default Tax Destination Calculation*

3. When complete, tap **Save Config.**

## Price Display Settings

**Important!** Some combinations of settings related to a price display that both includes and excludes tax can be confusing to the customer. To avoid triggering a warning message, see the [recommended settings](#).

- Expand  the **Price Display Settings** section. Then, do the following:



### *Price Display Settings*

- Set **Display Product Prices in Catalog** to one of the following:

Excluding Tax	Catalog prices that appear in the storefront do not include tax.
Including Tax	Catalog prices in the storefront include tax only if a tax rule matches the tax origin, or if the customer's address matches the tax rule. This might happen after a customer creates an account, logs in, or uses the Estimate Tax and Shipping tool in the cart.
Including and Excluding Tax	Catalog prices that appear in the storefront are displayed both with, and without tax.

- Set **Display Shipping Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

- Expand  the **Shopping Cart Display Settings** section.

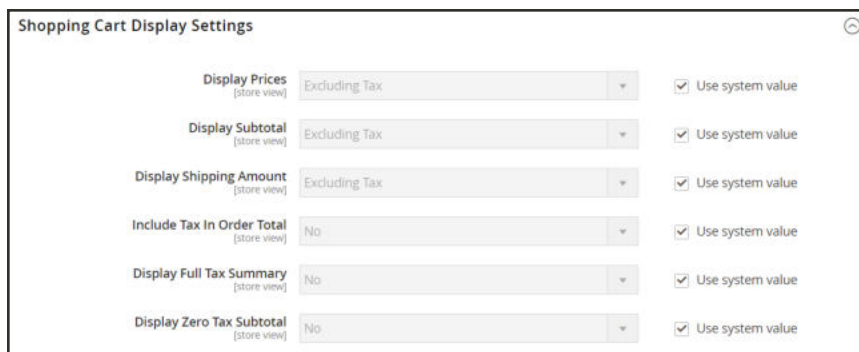
For each of the following settings, choose how you want taxes and prices to appear in the cart, according to the requirements of your store and locale.

- Set **Display Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

- Set **Display Subtotal** to one of the following:

- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- c. Set **Display Shipping Amount** to one of the following:
- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- d. Set the following to either “Yes” or “No,” according to your needs:
- Include Tax in Order Total
  - Display Full Tax Summary
  - Display Zero Tax Subtotal



*Shopping Cart Display Settings*

3. Expand ☺ the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following to specify how prices and taxes appear in orders, invoices, and credit memos.
- a. Set **Display Prices** to one of the following.
- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- b. Set **Display Subtotal** to one of the following:
- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- c. Set **Display Shipping Amount** to one of the following:

- Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- d. Set the following to “Yes” or “No,” according to your requirements:
- Include Tax in Order Total
  - Display Full Tax Summary
  - Display Zero Tax Subtotal

Setting	Value	Use system value
Display Prices [store view]	Excluding Tax	<input checked="" type="checkbox"/>
Display Subtotal [store view]	Excluding Tax	<input checked="" type="checkbox"/>
Display Shipping Amount [store view]	Excluding Tax	<input checked="" type="checkbox"/>
Include Tax In Order Total [store view]	No	<input checked="" type="checkbox"/>
Display Full Tax Summary [store view]	No	<input checked="" type="checkbox"/>
Display Zero Tax Subtotal [store view]	No	<input checked="" type="checkbox"/>

*Orders, Invoices, Credit Memos Display Settings*

4. When complete, tap **Save Config.**

## Cross-Border Price Consistency

Cross-border trade (also referred to as price consistency) supports European Union (EU) and other merchants who want to maintain consistent prices for customers whose tax rates are different than the store tax rate.

Merchants operating across regions and geographies can show their customers a single price by including the tax in the price of the product. Pricing is clean and uncluttered regardless of tax structures and rates that vary from country to country.

**Important!** When cross-border trade is enabled, your profit margin changes by tax rate. Profit is determined by the formula:  $(\text{Revenue} - \text{CustomerVAT} - \text{CostOfGoodsSold})$ .

### To enable cross-border price consistency:

1. On the Admin sidebar, choose **Stores**. Then under Settings, choose **Configuration**.
2. For a multisite configuration, set **Store View** to the website and store that is the target of the configuration.
3. In the panel on the left, under **Sales**, choose **Tax**.



- 4. Expand ☺ the **Calculation Settings** section. Then, do the following:

The screenshot shows the 'Calculation Settings' section of a Magento configuration page. It contains the following settings:

- Tax Calculation Method Based On** (website): Total (dropdown),  Use system value
- Tax Calculation Based On** (website): Shipping Address (dropdown),  Use system value
- Catalog Prices** (website): Including Tax (dropdown),  Use system value. Description: This sets whether catalog prices entered from Magento Admin include tax.
- Shipping Prices** (website): Excluding Tax (dropdown),  Use system value. Description: This sets whether shipping amounts entered from Magento Admin or obtained from gateways include tax.
- Apply Customer Tax** (website): After Discount (dropdown),  Use system value
- Apply Discount On Prices** (website): Excluding Tax (dropdown),  Use system value. Warning: To apply the discount on prices including tax and apply the tax after discount, set Catalog Prices to "Including Tax".
- Apply Tax On** (website): Custom price if available (dropdown),  Use system value
- Enable Cross Border Trade** (website): Yes (dropdown),  Use system value. Description: When catalog price includes tax, enable this setting to fix the price no matter what the customer's tax rate.

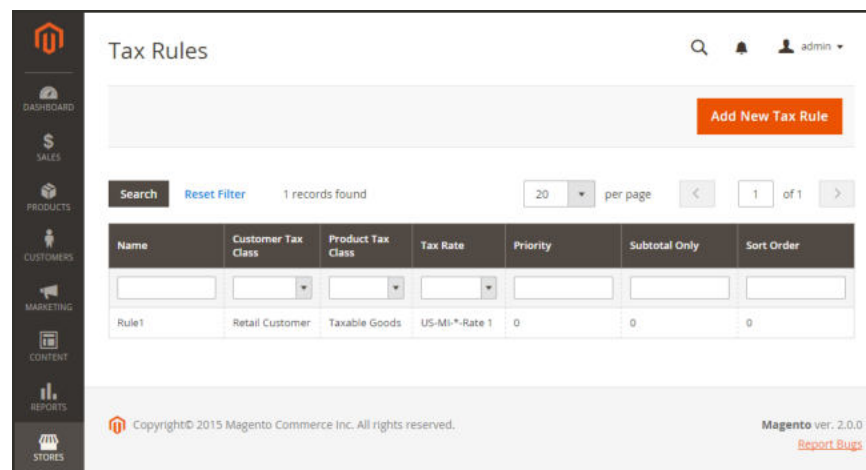
*Calculation Settings*

- a. Set **Catalog Prices** to “Including Tax.”
  - b. To enable cross-border price consistency, set **Enable Cross Border Trade** to “Yes.”
- 5. When complete, tap **Save Config**.

## Tax Rules

Tax rules incorporate a combination of product class, customer class and tax rate. Each customer is assigned to a customer class, and each product is assigned a product class. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the customer and product classes, and the region (based on the customer's shipping address, billing address or shipping origin).

When numerous taxes must be defined, you can simplify the process by importing them.



*Tax Rules*

### Step 1: Complete the Tax Rule Information

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. In the upper-right corner, tap **Add New Tax Rule**.
3. Under Tax Rule Information, enter a **Name** for the new rule.
4. Choose the **Tax Rate** that applies to the rule. If you need to edit an existing tax rate, do the following:
  - a. Hover over the tax rate, and tap the **Edit** icon.
  - b. Update the form as needed, and tap **Save**.

**Tax Rule Information**

Name \*

Tax Rate \* US-CA\*-Rate 1 US-NY\*-Rate 1 US-MI\*-Rate 1 ✎ ✖

*Tax Rule Information*

To enter tax rates, use either of the following methods:

**Method 1: Enter Tax Rates Manually**

1. Tap **Add New Tax Rate**.
2. Complete the form as needed. For more information, see: [Tax Zones and Rates](#).
3. When complete, tap **Save**.

**Tax Rate** ✕

Tax Identifier \*

Zip/Post is Range

Zip/Post Code   
\* - matches any; 'xyz\*' - matches any that begins on 'xyz' and are not longer than 10.

State \*  ▼

Country \*  ▼

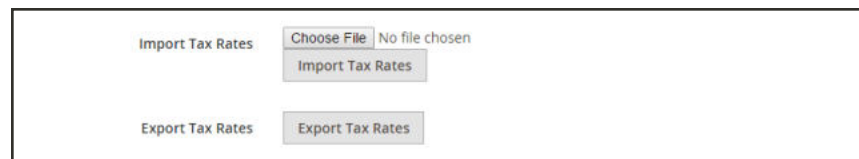
Rate Percent \*

*New Tax Rate*

## Method 2: Import Tax Rates

1. Scroll down to the section at the bottom of the page.
2. To import tax rates, do the following:
  - a. Tap **Choose File**, and navigate to the CSV file with the tax rates to be imported.
  - b. Tap **Import Tax Rates**.
3. To export tax rates, tap **Export Tax Rates**.

To learn more, see: [Import/Export Tax Rates](#).



*Import / Export Tax Rates*

## Step 2: Complete the Additional Settings

4. Tap **Additional Settings** to open the section. Then, do the following:
  - a. Choose the **Customer Tax Class** to which the rule applies.
    - To edit a customer tax class, tap the edit ✎ icon. Then, update the form as needed, and tap **Save**.
    - To create a new tax class, tap **Add New Tax Class**. Then, complete the form as needed, and tap **Save**.
  - b. Choose the **Product Tax Class** to which the rule applies.
    - To edit a product tax class, tap the edit ✎ icon. Then, update the form as needed, and tap **Save**.
    - To create a new tax class, tap **Add New Tax Class**. Then, complete the form as needed, and tap **Save**.
  - c. In the **Priority** field, enter a number to indicate the priority of this tax, when more than one tax applies. If two tax rules with the same priority apply, then the taxes are added together. If two taxes with different priority settings apply, then the taxes are compounded.
  - d. If you want taxes to be based on the order subtotal, mark the **Calculate off Subtotal Only** checkbox.

- e. In the **Sort Order** field, enter a number to indicate the order of this tax rule when listed with others.

The screenshot shows the 'Additional Settings' section of a tax rule configuration. It contains the following fields and options:

- Customer Tax Class:** A dropdown menu with 'Retail Customer' selected. Below it is an 'Add New Tax Class' button.
- Product Tax Class:** A dropdown menu with 'Taxable Goods' selected. Below it is an 'Add New Tax Class' button.
- Priority:** A text input field containing '0'. Below it is a note: 'Tax rates at the same priority are added, others are compounded.'
- Calculate Off Subtotal Only:** A checkbox that is currently unchecked.
- Sort Order:** A text input field containing '0'.

*Additional Settings*

5. When complete, tap **Save Rule**.

## Tax Classes

Tax classes can be assigned to customers, products, and shipping. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the cart, and the region (as determined by the customer's shipping address, billing address or shipping origin). New tax classes can be created when a **tax rule** is defined.



### Customer

---

You can create as many customer tax classes as you need, and assign them to **customer groups**. For example, in some jurisdictions, wholesale transactions are not taxed, but retail transactions are. You can associate members of the Wholesale Customer group with the Wholesale tax class.



### Product

---

Product classes are used in calculations to determine the correct tax rate is applied in the shopping cart. When you create product, it is assigned to a specific tax class. For example, food might not be taxed, or be taxed at a different rate.



### Shipping

---

If your store charges an additional tax on shipping, you should designate a specific product tax class for shipping. Then in the configuration, specify it as the tax class that is used for shipping.

## Configuring Tax Classes

The tax class that is used for shipping, and the default tax classes for **products and customers** are set in the Sales configuration.



The screenshot shows the 'Tax Classes' configuration panel. It contains three rows, each with a label, a dropdown menu, and a checkbox. The first row is 'Tax Class for Shipping' with a dropdown set to 'None' and a checked 'Use system value' checkbox. The second row is 'Default Tax Class for Product' with a dropdown set to 'Taxable Goods' and a checked 'Use system value' checkbox. The third row is 'Default Tax Class for Customer' with a dropdown set to 'Retail Customer' and a checked 'Use system value' checkbox. The panel title 'Tax Classes' is at the top left, and a close icon is at the top right.

Configuration Item	Selected Value	Use System Value
Tax Class for Shipping [website]	None	<input checked="" type="checkbox"/>
Default Tax Class for Product [global]	Taxable Goods	<input checked="" type="checkbox"/>
Default Tax Class for Customer [global]	Retail Customer	<input checked="" type="checkbox"/>

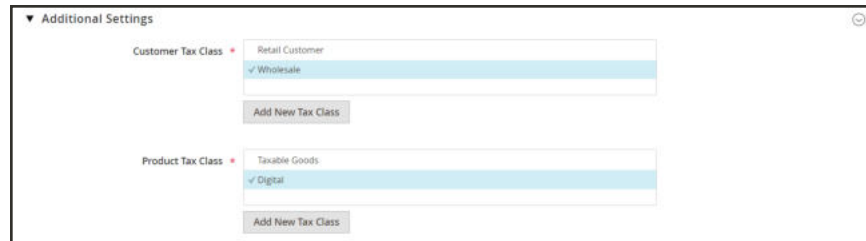
### *Tax Classes*

#### To configure tax classes:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand ☺ the **Tax Classes** section. Then, choose the tax class for each of the following:
  - Set Tax Class for Shipping
  - Default Tax Class for Product
  - Default Tax Class for Customer
4. When complete, tap **Save Config**.

## Adding New Tax Classes

Tax classes for customers and products can be easily added, and then assigned to individual customers and products, and used in tax rules.



*New Tax Classes*

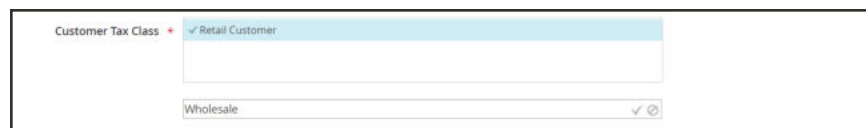
### To add a new tax class:

1. On the Admin sidebar, choose **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. Tap **Add New Tax Rule**. Then, expand ☺ the **Additional Settings** section.
3. To add a new Customer Tax Class, do the following:
  - a. Under **Customer Tax Class**, tap **Add New Tax Class**.



*Add New Tax Class*

- b. Enter the **Name** of the new tax class in the text box. Then, click the checkmark to add the new class to the list of available customer tax classes.



*Wholesale Tax Class*



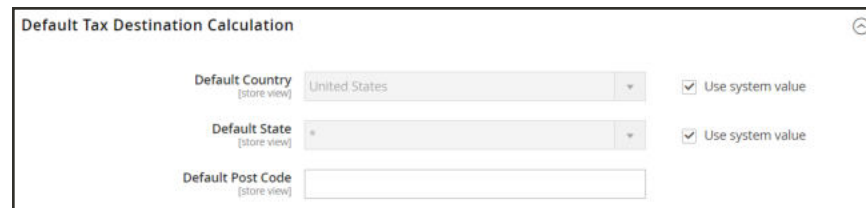
4. To add a new Product Tax Class, do the following:
  - a. Under **Product Tax Class**, tap **Add New Tax Class**.
  - b. Enter the **Name** of the new tax class in the text box. Then, click the checkmark to add the new class to the list of available product tax classes.

*Digital Product Tax Class*

5. When complete, tap **Back** in the button bar to return to the Tax Rules grid.

## Default Tax Destination

The default tax destination settings determine the country, state, and ZIP or postal code that are used as the basis of tax calculations.



The screenshot shows a configuration panel titled "Default Tax Destination Calculation" with a close button in the top right corner. It contains three rows of settings:

- Default Country** [store view]: A dropdown menu showing "United States" with a checkmark and the text "Use system value" to its right.
- Default State** [store view]: A dropdown menu with a checkmark and the text "Use system value" to its right.
- Default Post Code** [store view]: An empty text input field.

*Default Tax Destination Calculation*

### To configure the default tax destination for calculations:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configure**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand ☺ the **Default Tax Destination Calculation** section. Then, do the following:
  - a. Set **Default Country** to the country upon which tax calculations are based.
  - b. Set **Default State** to the state or province that is used as the basis of tax calculations.
  - c. Set **Default Post Code** to the ZIP or postal code that is used as the basis of local tax calculations.
4. When complete, tap **Save Config**.

## EU Place of Supply for Digital Goods

European Union (EU) merchants must report their digital goods sold by quarter to each member country. Digital goods are taxed based on the customer's shipping address. The law requires merchants to run a tax report and identify the relevant tax amounts for digital goods, as opposed to physical goods.

Merchants must report all digital goods sold by EU member countries on a quarterly basis to a central tax administration, along with payment due for tax collected during the period.

Merchants who have not yet reached the threshold (50k/100k Euro of annual business) must continue to report physical goods sold to the EU states where they have registered VAT numbers.

Merchants who are audited for taxes paid for digital goods, must provide two pieces of supporting information to establish the customer place of residence.

- The customer's shipping address and a record of a successful payment transaction can be used to establish the customer place of residence. (Payment is accepted only if the shipping address matches payment provider information.)
- The information can also be captured directly from the data store in the Magento database tables.

### To collect digital goods tax information:

1. Load the tax rates for all EU member countries.
2. Create a digital goods product tax class.
3. Assign all your digital goods to the digital goods product tax class.
4. Create **tax rules** for your physical goods, using physical product tax classes, and associate them with the appropriate tax rates.
5. Create tax rules for your digital goods, using the product tax class for digital goods, and associate them with the appropriate tax rates for EU member countries.
6. Run the tax report for the appropriate period, and collect the required digital goods information.
7. Export the tax amounts that are related to the tax rates for the digital goods product tax class.

### See also:

[European Commission Taxation and Customs Union](#)

[EU 1015 Place of Supply Changes](#)

## Fixed Product Tax

Some tax jurisdictions have a fixed tax that must be added to certain types of products. You can set up a fixed product tax (FPT) as needed for your store's tax calculations. For example, in some countries FPT can be used to set up a Waste Electrical and Electronic Equipment Directive (WEEE) tax, also known as "ecological tax" or "eco tax," that is collected on certain types of electronics to offset the cost of recycling. This tax is a fixed amount, rather than a percentage of the product price.

Fixed product taxes apply at the item level, based on the product. In some jurisdictions this tax is subject to an additional % tax calculation. Your tax jurisdiction might also have rules about how the product price appears to customers, either with or without tax. Be sure that you understand the rules, and set your FPT display options accordingly.

We recommend that you exercise caution when quoting FPT prices in email, because the difference in price can affect customer confidence in their orders. For example, if you 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 without an itemized breakdown. The difference in price might lead some customers to abandon their carts because the total differs from the amount expected.

### FPT Display Prices

FPT	DISPLAY SETTING AND CALCULATION	
Not Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is added to the base price of an item; but is not included in tax- rule-based calculations.
	Excluding FPT, FPT Description, Final Price	Prices appear without FPT amount or description. FPT is not included in tax-rule-based calculations.
Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is included in the price of an item, and no change to tax calculations is required.
	Excluding FPT, FPT Description, Final Price	Prices appear without the FPT amount or description. However, FPT is included in tax-rule-based calculations.

## Configuring FPT

The Fixed Product Tax **input type** creates a section of fields for managing tax for each region.

The following instructions show how to set up a fixed product tax for your store, using “eco tax” as an example. After setting the scope for the tax and the countries and states where the tax applies, and depending on the options you choose, the input fields can change according to the local requirements. To learn more, see: [Creating Attributes](#).

### Process Overview:

Step 1: [Enable Fixed Product Tax](#)

Step 2: [Create an FPT Attribute](#)

Step 3: [Add the FPT Attribute to an Attribute Set](#)

Step 4: [Apply FPT to Products](#)

### Step 1: Enable Fixed Product Tax

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand ☺ the **Fixed Product Taxes** section. Then, do the following:
  - a. Set **Enable FPT** to “Yes.”
  - b. To determine how fixed product taxes are used in store prices, choose the FPT setting for each of the following price display locations. (The options are the same for each location.)
    - Product View Page
    - Sales Modules
    - Emails

#### OPTIONS

Including FPT Only

Including FPT and FPT description

Excluding FPT. Including FPT description and final price

Excluding FPT

- c. Set **Apply Tax to FPT** as needed.
- d. Set **Include FPT in Subtotal** as needed.

*Fixed Product Taxes*

4. When complete, tap **Save Config.**

## Step 2: Create an FPT Attribute

1. On the Admin sidebar, tap **Stores**. Then under **Attributes** choose **Product**.
2. In the upper-right corner, tap **Add New Attribute**. Then, do the following:
  - a. Enter a **Default Label** to identify the attribute.
  - b. Set **Catalog Input for Store Owner** to “Fixed Product Tax.”

*Attribute Properties*

3. Expand ☺ the **Advanced Attribute Properties** section. Then, do the following:
  - a. In the **Attribute Code** field, enter a unique identifier in lowercase, without spaces or special characters. The maximum length is 30 characters. You can leave the field blank to the text from the Default Label field.
  - b. If you want the FPT field to appear in the Inventory **grid**, set **Add to Column Options** to “Yes.”
  - c. If you want to be able to **filter** products in the grid based on the value of the FPT field, set **Use in Filter Options** to “Yes.”

**Advanced Attribute Properties**

**Attribute Code**   
This is used internally. Make sure you don't use spaces or more than 30 symbols.

**Add to Column Options**    
Select "Yes" to add this attribute to the list of column options in the product grid.

**Use in Filter Options**    
Select "Yes" to add this attribute to the list of filter options in the product grid.

*Advanced Attribute Properties*

- 4. (Optional) In the panel on the left, choose **Manage Labels**. Then, enter a label to use instead of the default label for each store view.

**New Product Attribute**

← Back   Reset   Save and Continue Edit   **Save Attribute**

**ATTRIBUTE INFORMATION**

Properties

**Manage Labels**

**Manage Titles (Size, Color, etc.)**

English	French	German	Spanish
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

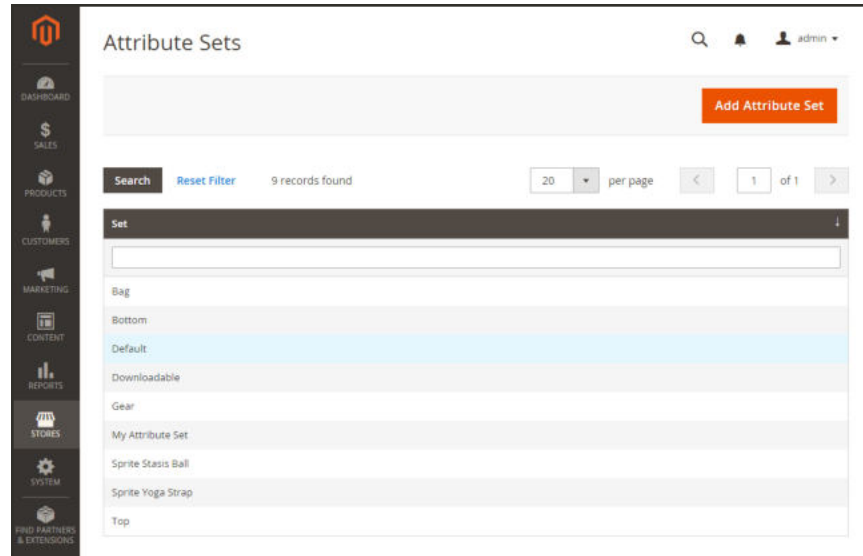
Copyright © 2016 Magento Commerce Inc. All rights reserved.      Magento ver. 2.0.0 [Report Bugs](#)

*Manage Labels*

- 5. When complete, tap **Save Attribute**. Then when prompted, refresh the **cache**.

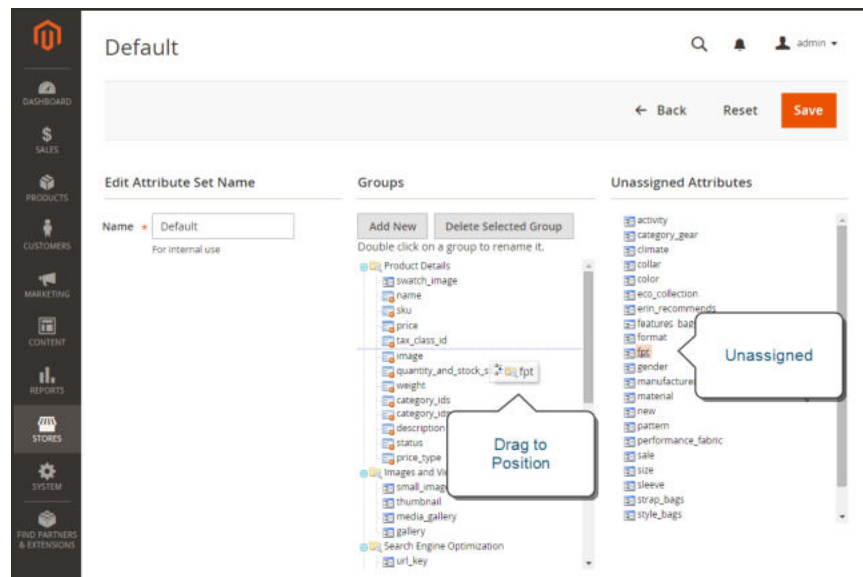
### Step 3: Add the FPT Attribute to an Attribute Set

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Attribute Set**.
2. In the list, tap the attribute set to open the record in edit mode.



3. Drag the FPT attribute from the list of **Unassigned Attributes** on the right to the **Groups** list in the center column.

Each group folder corresponds to a section of product information. You can place the attribute wherever you want it to appear when the product is open in edit mode.



*Edit Attribute Set*



4. When complete, tap **Save**.
5. Repeat this step for each attribute set that needs to include fixed product tax.

#### Step 4: Apply FPT to Specific Products

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Open the product that needs a fixed product tax in edit mode.
3. Find the **FPT** section of fields that you added to the attribute set. Tap **Add Tax**, and do the following:

FPT	Website	Country/State	Tax	Action
	All Web: ▼	Belgium ▼	0.30	Delete Tax

Add Tax

*Fixed Product Tax for Belgium*

- a. If your Magento installation has multiple websites, choose the appropriate **Website** and base currency. In this example, the field is set by default to “All Websites [USD].”
  - b. Set **Country/State** to the region where the fixed product tax applies.
  - c. Enter the fixed product tax as a decimal amount in the **Tax** field.
  - d. To add more fixed product taxes, tap **Add Tax**, and repeat the process.
4. When complete, tap **Save**.

## Price Display Settings

The price display settings determine if product and shipping prices include or exclude tax, or show two versions of the price; one with, and the other without tax.

If the product price includes tax, the tax appears only if there is a tax rule that matches the tax origin, or if a customer address matches the tax rule. Events that can trigger a match include when a customer creates an account, logs in, or generates a tax and shipping estimate from the shopping cart.

**Important!** Showing prices that include and exclude tax can be confusing to the customer. To avoid triggering a warning message, see the [guidelines](#) for your country, and [recommended settings](#). to avoid warning messages.



Price Display Settings	
Display Product Prices in Catalog <small>[store view]</small>	Excluding Tax <input type="checkbox"/> Use system value
Display Shipping Prices <small>[store view]</small>	Excluding Tax <input checked="" type="checkbox"/> Use system value

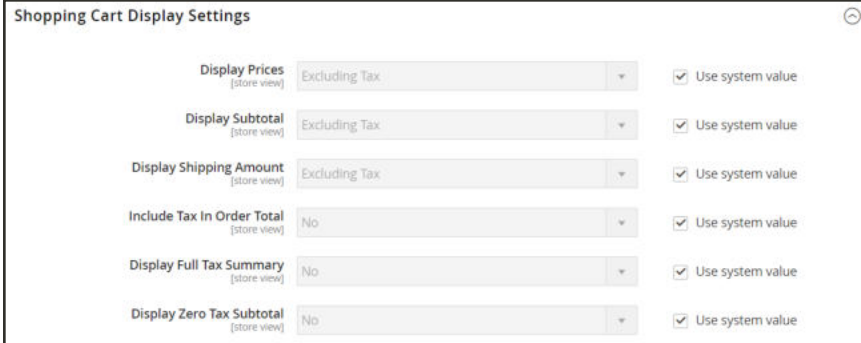
### *Price Display Settings*

#### Step 1: Configure Price Display Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Taxes**.
3. Expand ☺ the **Price Display Settings** section. Then, do the following:
  - a. Set **Display Product Prices in Catalog** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - b. Set **Display Shipping Prices** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax

## Step 2: Configure Shopping Cart Display Settings

1. Expand  the **Shopping Cart Display Settings** section. Then, do the following:



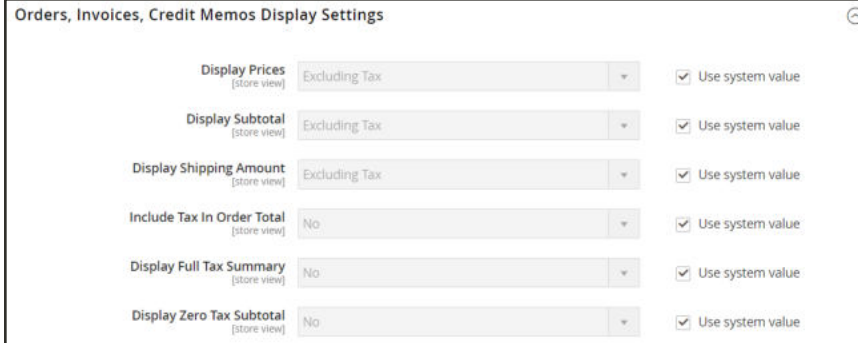
Setting	Value	Use system value
Display Prices [store view]	Excluding Tax	<input checked="" type="checkbox"/>
Display Subtotal [store view]	Excluding Tax	<input checked="" type="checkbox"/>
Display Shipping Amount [store view]	Excluding Tax	<input checked="" type="checkbox"/>
Include Tax In Order Total [store view]	No	<input checked="" type="checkbox"/>
Display Full Tax Summary [store view]	No	<input checked="" type="checkbox"/>
Display Zero Tax Subtotal [store view]	No	<input checked="" type="checkbox"/>

*Shopping Cart Display Settings*

- a. Set **Display Prices** to one of the following:
  - Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- b. Set **Display Subtotal** to one of the following:
  - Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- c. Set **Display Shipping Amount** to one of the following:
  - Excluding Tax
  - Including Tax
  - Including and Excluding Tax
- d. Set the following to “Yes” or “No” according to your preference:
  - Include Tax in Order Total
  - Display Full Tax Summary
  - Display Zero Tax Subtotal

### Step 3: Configure Order, Invoice & Credit Memo Display Settings

- Expand  the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following:



Setting	Value	Use system value
Display Prices (store view)	Excluding Tax	<input checked="" type="checkbox"/>
Display Subtotal (store view)	Excluding Tax	<input checked="" type="checkbox"/>
Display Shipping Amount (store view)	Excluding Tax	<input checked="" type="checkbox"/>
Include Tax In Order Total (store view)	No	<input checked="" type="checkbox"/>
Display Full Tax Summary (store view)	No	<input checked="" type="checkbox"/>
Display Zero Tax Subtotal (store view)	No	<input checked="" type="checkbox"/>

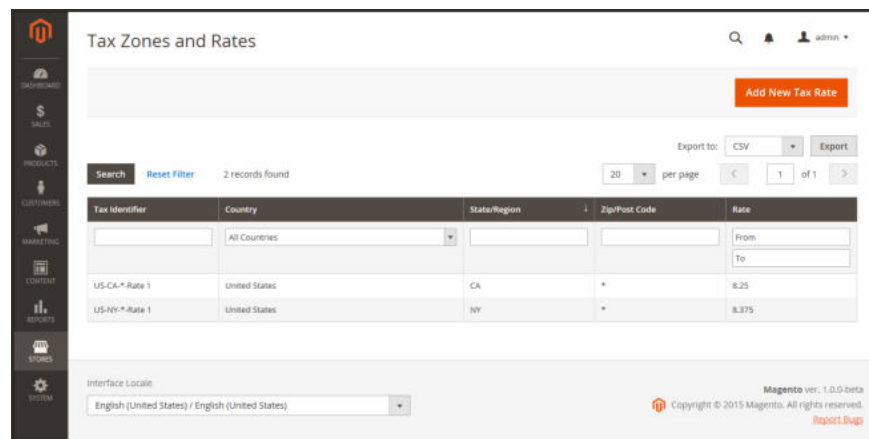
*Orders, Invoices, Credit Memos Display Settings*

- Set **Display Prices** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - Set **Display Subtotal** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - Set **Display Shipping Amount** to one of the following:
    - Excluding Tax
    - Including Tax
    - Including and Excluding Tax
  - Set the following to “Yes” or “No” according to your preference:
    - Include Tax in Order Total
    - Display Full Tax Summary
    - Display Zero Tax Subtotal
- When complete, tap **Save Config**.

## Tax Zones and Rates

Tax rates generally apply to transactions that take place within a specific geographical area. The Tax Zones and Rates tool enables you to specify the tax rate for each geographical area from which you collect and remit taxes. Because each tax zone and rate has a unique identifier, you can have multiple tax rates for a given geographic area (such as places that do not tax food or medicine, but do tax other items).

Store tax is calculated based on the store's address. The actual customer tax for an order is calculated after the customer completes the order information. Magento then calculates the tax based upon the tax configuration of the store.



*Tax Zones and Rates*

### To define a new tax rate:

1. On the Admin sidebar, tap **Stores**. Under **Taxes**, choose **Tax Zones and Rates**.
2. In the upper-right corner, tap **Add New Tax Rate**.
3. Enter a **Tax Identifier**.
4. To apply the tax rate to a single ZIP or postal code, enter the code in the **Zip/Post Code** field.
5. The asterisk wildcard (\*) can be used to match up to ten characters in the code. For example, 90\* represents all ZIP codes from 90000 through 90999.
6. To apply the tax rate to a range of ZIP or postal codes, do the following:

- a. Mark the **Zip/Post is Range** checkbox. Then in the **Range From** and **Range To** fields, enter the first and last ZIP or postal code to define the range.

*ZIP/Post is Range*

- b. Choose the **State** where the tax rate applies.
  - c. Choose the **Country** where the tax rate applies.
  - d. Enter the **Rate Percent** that is used for the tax rate calculation.
7. When complete, tap **Save Rate**.

*New Tax Rate*

### To edit an existing tax rate:

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Zones and Rates**.
2. Find the tax rate in the Tax Zones and Rates grid, and open the record in edit mode.  
If there are many rates in the list, use the **filter controls** to find the rate you need.
3. Make the necessary changes to the **Tax Rate Information**.
4. Update the **Tax Titles** as needed.
5. When complete, tap **Save Rate**.

## Import/Export Tax Rates

If you conduct business in several states and ship a large quantity of product, entering tax rates manually can be very time consuming. It is faster and more efficient to download tax rates by ZIP code and import them into Magento. The following example shows how to import a set of California tax rates downloaded from the [Avalara](#) website. Avalara is a [Magento Technology Partner](#) and provides [tax rate tables](#) for every ZIP code in the United States, which you can download at no charge.

**Process Overview:**

- Step 1: [Export the Magento Tax Rate Data](#)
- Step 2: [Prepare the Import Data](#)
- Step 3: [Import the Tax Rates](#)

### Step 1: Export the Magento Tax Rate Data

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export Tax Rates**.
2. Tap **Export Tax Rates**. Look for the download file in the lower-left corner of the browser window.
3. Save the file, and then open it in a spreadsheet. (In this example, we use OpenOffice Calc.)

The exported Magento tax rate data includes the following columns:

- Code
- Country
- State
- Zip/Post Code
- Rate
- Range From
- Range To
- A column for each store view

Code	Country	State	Zip/Post Code	Rate	Zip/Post is Range	Range From	Range To	english	french	german	spanish
US-CA--Rate 1	US	CA	*	8.25							
US-NY--Rate 1	US	NY	*	8.375							
US-MI--Rate 1	US	MI	*	8.25							

*Exported Tax Rate Data*

4. Open the new tax rate data in a second instance of the spreadsheet, so you can see both, side by side.

In the new tax rate data, take note of any additional tax rate data that you might need to set up in your store before the data is imported. For example, the tax rate data for California also includes:

- TaxRegionName
- CombinedRate
- StateRate
- CountyRate
- CityRate
- SpecialRate

If you need to import additional **tax zones and rates**, you must first define them from the Admin of your store, and update the **tax rules** as needed. Then, export the data, and open the file in OpenOffice Calc, so it can be used for reference. However, to keep this example simple, we will import only the standard tax rate columns.

## Step 2: Prepare the Import Data

You now have two spreadsheets open, side by side. One with the Magento export file structure, and the other with the new tax rate data that you want to import.

1. To create a place to work in the spreadsheet with the new data, insert as many blank columns at the far left as needed. Then, use cut and paste to rearrange the columns so they match the order of the Magento export data.
2. Rename the column headers to match the Magento export data.
3. Delete any columns that have no data. Otherwise, the structure of the import file should match the original Magento export data.
4. Before saving the file, scroll down and make sure that the tax rate columns contain only numeric data. Any text found in a tax rate column will prevent the data from being imported.
5. Save the prepared data as a .CSV file. When prompted, verify that a comma is used as a **Field delimiter**, and double quotes as the **Text delimiter**. Then, tap **OK**.



### Step 3: Import the Tax Rates

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export Tax Rates**.
2. Tap **Browse**, and choose the .CSV tax rate file that you prepared to import. Then, tap **Import Tax Rates**.

It might take several minutes to import the data. When the process is complete, the message, "The tax rate has been imported" appears. If you receive an error message, correct the problem in the data and try again.

3. On the Admin sidebar, tap **Stores**. Then under Taxes, choose **Tax Zones and Rates**. The imported rates appear in the list. Use the **page controls** to view the new tax rates.

The screenshot shows the 'Tax Zones and Rates' page in an admin interface. It features a search bar, a 'Reset Filter' button, and a message indicating '122 records found'. There are controls for 'Export to: CSV' and 'Export', and a '20 per page' selector. The main content is a table with the following data:

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
MADERA	United States	CA	94976	0.065
FERNANDO	United States	CA	91341	0.065
SACRAMENTO	United States	CA	95799	0.065
AGOW	United States	CA	93662	0.01
AJEI	United States	CA	95077	0.01
AGSZ	United States	CA	92233	0.01
SHASTA	United States	CA	96067	0.065
MOON	United States	CA	94019	0.095
AIVM	United States	CA	95330	0.01
AJSV	United States	CA	93258	0.01
AGBF	United States	CA	94557	0.01
US-CA-*Rate 1	United States	CA	*	8.25
COUNTY	United States	CA	96148	0.065
AGZM	United States	CA	95453	0.01
AGVM	United States	CA	92556	0.01

*Imported Tax Rates*

4. Run some test transactions in your store with customers from different ZIP codes to make sure that the new tax rates work correctly.

## Value Added Tax (VAT)

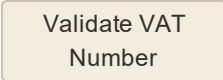
Some countries charge a value-added tax, or VAT, on goods and services. There can be different VAT rates depending on which stage you as a merchant are at in the manufacture or distribution of the products, materials, or services that you sell to your customers. In some cases, you might need to use more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

Magento can be set up to charge a value-added tax if both the merchant and customer are located in the same EU country. No VAT is charged if the merchant and customer are located in different EU countries.

However, for the sale of **downloadable products** — or digital goods —, the VAT rate is based on the shipping destination, rather than the merchant location. To learn more, see: [EU Place of Supply for Digital Goods](#).

Magento uses the following fields and configuration settings to address different scenarios.

### Summary of VAT Fields

SECTION	DESCRIPTION	
<b>MERCHANT INFORMATION</b>		
Stores > Configuration > General > General > <a href="#">Store Information</a>		
Store Information	VAT Number	The value-added tax number that is assigned to the merchant.
		<b>VAT validation</b> confirms that the VAT Number matches the corresponding record in the <a href="#">European Commission</a> database.
<b>CUSTOMER INFORMATION</b>		
Customers > All Customers > Edit		
Account Information	Tax/VAT Number	If applicable, the tax number or value-added tax number that is assigned to the customer.
Addresses	VAT Number	If applicable, the value-added tax number that is associated with a specific billing or shipping address of the customer. For the sale of <b>digital goods</b> within the EU, the amount of the VAT is based on shipping destination.

**Summary of VAT Fields (cont.)**

SECTION	DESCRIPTION	
Configure > Customers > Customer Configuration		
Create New Account Options	Show VAT Number on Storefront	Determines if the customer VAT Number field is included in the Address Book that is available in the customer account.
	Default Value for Disable Automatic Group Changes Based on VAT ID	VAT ID is an internal identifier for the VAT Number of the customer when used in VAT Validation. During <b>VAT Validation</b> , Magento confirms that the number matches the <b>European Commission</b> database. Customers can be automatically assigned to one of the four default customer groups based on the validation results.

## Configuring VAT

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

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

In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. To learn more, see: [VAT ID Validation](#).

**Process Overview:**

- Step 1: [Set Up Customer Tax Classes](#)
- Step 2: [Set Up Product Tax Classes](#)
- Step 3: [Set Up Tax Zones and Rates](#)
- Step 4: [Set Up Tax Rules](#)
- Step 5: [Apply Tax Classes to Products](#)

### Step 1: Set Up Customer Tax Classes

1. On the Admin sidebar, tap **Stores**. Then, choose, **Tax Zones and Rates**.
2. Ensure that there is a customer tax class that is appropriate to use with the VAT. For this example, ensure that there is a customer tax class named Retail Customer. If Retail Customer does not exist, click the **Add New** button and add it.

### Step 2: Set Up Product Tax Classes

1. On the Admin menu, select **Sales > Tax > Product Tax Classes**.
2. Click the **Add New** button and create three new classes:
  - VAT Standard
  - VAT Reduced
  - VAT Zero
3. Click the **Save Class** button for each new class that you add.

### Step 3: Set Up Tax Zones and Rates

1. On the Admin menu, select **Sales > Tax > Manage Tax Zones & Rates**.  
For this example you can remove the U.S. tax rates, or leave them as they are.
2. Click the **Add New Tax Rate** button. Add new rates as follows:

NEW TAX RATE	SETTINGS	
VAT Standard	Tax Identifier:	VAT Standard
	Country and State:	United Kingdom
	Rate Percent:	20.00
VAT Reduced	Tax Identifier:	VAT Reduced
	Country and State:	United Kingdom
	Rate Percent:	5.00

3. Click the **Save Rate** button for each rate.

### Step 4: Set Up Tax Rules

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

1. On the Admin menu, select **Sales > Tax > Manage Tax Rules**.
2. Add new tax rules as follows:

NEW TAX RULE	SETTINGS	
VAT Standard	Name:	VAT Standard
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Standard
	Tax Rate:	VAT Standard Rate
VAT Reduced	Name:	VAT Reduced
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Reduced
	Tax Rate:	VAT Reduced Rate

3. Click the **Save Rule** button for each rate.

### Step 5: Apply Tax Classes to Products

1. On the Admin menu, select **Catalog > Manage Products**.
2. Open a product from your catalog in edit mode.
3. On the General page, find the **Tax Class** field. Then, select the **VAT Class** that applies to the product.
4. When complete, click the **Save** button.

## VAT ID Validation

VAT ID Validation automatically calculates the required tax for B2B transactions that take place within the European Union (EU), based on the merchant and customer locale. Magento performs VAT ID validation using the web services of the [European Commission](#) server.

VAT-related tax rules do not influence other tax rules, and do not prevent the application of other tax rules. Only one tax rule can be applied at a given time.

- VAT is charged if the merchant and customer are located in the same EU country.
- VAT is not charged if the merchant and customer are located in different EU countries, and both parties are EU-registered business entities.

The store administrator creates more than one default customer group that can be automatically assigned to the customer during account creation, address creation or update, and checkout. The result is that different tax rules are used for intra-country (domestic) and intra-EU sales.

**Important:** If you sell virtual or downloadable products, which by their nature do not require shipping, the VAT rate of a customer's location country should be used for both intra-union and domestic sales. You must create additional individual tax rules for product tax classes that correspond to the virtual products.

### Customer Registration Workflow

If VAT ID Validation is enabled, after registration each customer is proposed to enter the VAT ID number. However only those who are registered VAT customers are expected to fill this field.

After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address or changes the whole default address. The group can be temporarily changed (group change will be emulated) in some cases during one-page checkout.

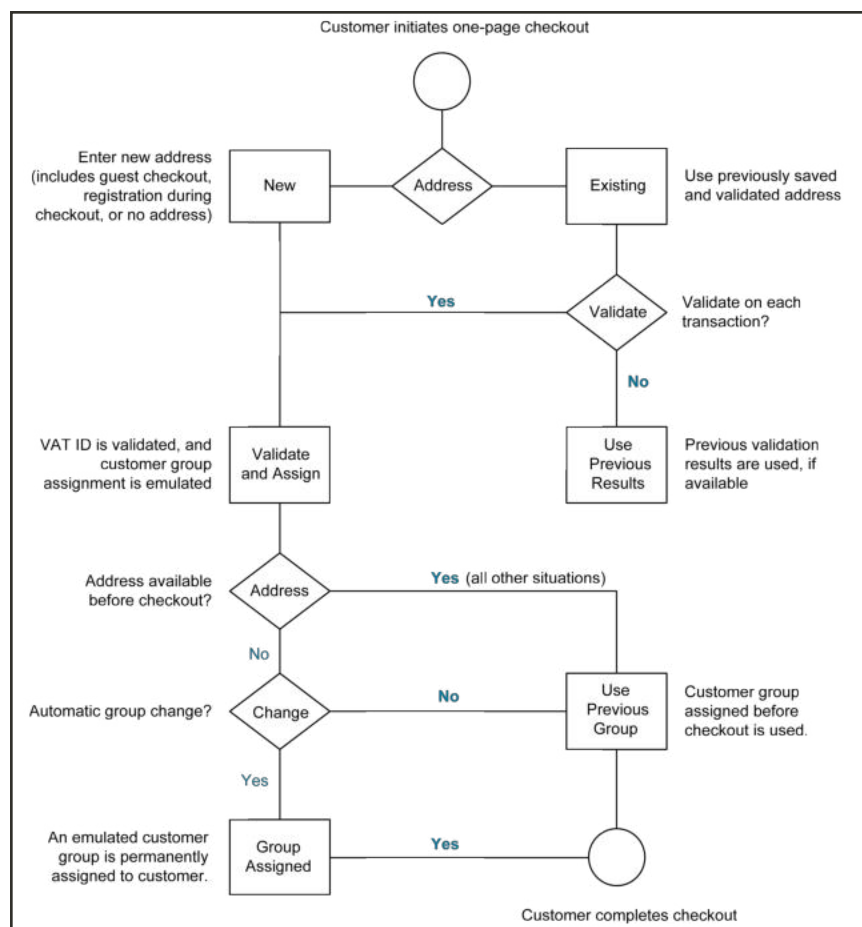
If enabled, you can override VAT ID Validation for individual customers by selecting the checkbox on the Customer Information page.

## Checkout Workflow

If a customer’s VAT validation is performed during checkout, the VAT request identifier and VAT request date are saved in the Comments History section of the order.

The system behavior concerned with the VAT ID validation and the customer group change during the checkout depends on how the Validate on Each Transaction and the Disable Automatic Group Change settings are configured. This section describes the implementation of the VAT ID Validation functionality for the checkout on the frontend.

In case a customer uses Google Express Checkout, PayPal Express Checkout or another external checkout method, when the checkout is performed completely on the side of the external payment gateway, the Validate on Each Transaction setting cannot be applied. Thus the customer group cannot change during checkout.



VAT Validation Checkout Workflow

## Configuring VAT ID Validation

To configure VAT ID validation, you must first set up the customer groups that are needed, and create the related tax classes, rates, and rules. Then, enable VAT ID validation for the store, and complete the configuration.

The following examples show how tax classes and rates are used for VAT ID Validation. Take a look at the examples, and then follow the instructions to set up the tax classes and rules that are needed for your store.

### Example: Minimal Tax Rules Required for VAT ID Validation

#### TAX RULE #1

Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	Product tax classes must include a class for products of all types, except bundle and virtual.
Tax Rate	The tax rate must include the VAT rate of the merchant's country.

#### TAX RULE #2

Customer Tax Class	A class for intra-union customers.
Product Tax Class	A class for products of all types, except virtual.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

#### TAX RULE #3 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)

Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	A class for virtual products.
Tax Rate	VAT rate of the merchant's country.

#### TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)

Customer Tax Class	A class for intra-union customers.
--------------------	------------------------------------



**TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)**

Product Tax Class	A class for virtual products.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

**Process Overview:**Step 1: [Create VAT-Related Customer Groups](#)Step 2: [Create VAT-Related Classes, Rates and Rules](#)Step 3: [Enable and Configure VAT ID Validation](#)Step 4: [Set your VAT ID and Location Country](#)Step 5: [Verify the List of EU Member Countries](#)**Step 1: Create VAT-Related Customer Groups**

VAT ID Validation automatically assigns 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 for VAT ID Validation or use existing groups, if they comply with your business logic. When configuring VAT ID Validation, you must assign each of the created customer groups as a default for customers with appropriate VAT ID validation results.

**Step 2: Create VAT-Related Classes, Rates, and Rules**

Each tax rule is defined by three entities:

- Customer Tax Classes
- Product Tax Classes
- Tax Rates

Create the **tax rules** that you need to use VAT ID Validation effectively.

- Tax rules include tax rates and **tax classes**.
- Tax classes are assigned to **customer groups**.

### Step 3: Enable and Configure VAT ID Validation

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**.
2. If necessary, set the **Store View** for the configuration.
3. In the panel on the left under **Customers**, choose **Customer Configuration**.
4. Expand ☺ the **Create New Account Options** section.

In the following screenshot, the general customer settings that are not related to VAT Validation are grayed out.

**Create New Account Options**

Enable Automatic Assignment to Customer Group <small>[store view]</small>	Yes	Use system value
Tax Calculation Based On <small>[store view]</small>	Billing Address	Use system value
Default Group <small>[store view]</small>	General	Use system value
Group for Valid VAT ID - Domestic <small>[store view]</small>	-- Please Select --	
Group for Valid VAT ID - Intra-Union <small>[store view]</small>	-- Please Select --	
Group for Invalid VAT ID <small>[store view]</small>	-- Please Select --	
Validation Error Group <small>[store view]</small>	-- Please Select --	
Validate on Each Transaction <small>[store view]</small>	No	
Default Value for Disable Automatic Group Changes Based on VAT ID <small>[global]</small>	Yes	
Show VAT Number on Storefront <small>[website]</small>	No	Use system value
To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.		
Default Email Domain <small>[store view]</small>	example.com	Use system value
Default Welcome Email <small>[store view]</small>	New Account (Default)	Use system value
Email template chosen based on theme fallback when "Default" option is selected.		
Default Welcome Email Without Password <small>[store view]</small>	New Account Without Password (Default)	Use system value
This email will be sent instead of the Default Welcome Email, if a customer was created without password.		
Email template chosen based on theme fallback when "Default" option is selected.		
Email Sender <small>[store view]</small>	General Contact	Use system value
Require Emails Confirmation <small>[website]</small>	No	Use system value
Confirmation Link Email <small>[store view]</small>	New Account Confirmation Key (Default)	Use system value
Email template chosen based on theme fallback when "Default" option is selected.		
Welcome Email <small>[store view]</small>	New Account Confirmed (Default)	Use system value
This email will be sent instead of the Default Welcome Email, after account confirmation.		
Email template chosen based on theme fallback when "Default" option is selected.		
Generate Human-Friendly Customer ID <small>[global]</small>	No	

#### *Create New Account Options*

5. Set **Enable Automatic Assignment to Customer Group** to “Yes.” Then complete the following fields as needed.
  - Default Group
  - Default Value for Disable Automatic Group Changes Based on VAT ID
  - Show VAT Number on Storefront
6. When complete, tap **Save Config.**

### Step 4: Set Your VAT ID and Location Country

1. In the Configuration panel on the left under **General**, choose **General**.
2. Expand ☺ the **Store Information** section. Then, do the following:

The screenshot shows a configuration panel titled "Store Information" with a close button in the top right corner. The panel contains the following fields from top to bottom:

- Store Name [store view] (text input)
- Store Phone Number [store view] (text input)
- Store Hours of Operation [store view] (text input)
- Country [website] (dropdown menu with "--Please Select--" selected)
- Region/State [website] (text input)
- ZIP/Postal Code [website] (text input)
- City [website] (text input)
- Street Address [website] (text input)
- Street Address Line 2 [website] (text input)
- VAT Number [website] (text input)

At the bottom of the form is a button labeled "Validate VAT Number".

#### *Store Information*

- a. Select your **Country**.
- b. Enter your **VAT Number**. Then, tap **Validate VAT Number**. The result appears immediately.
3. When complete, tap **Save Config.**

### Step 5: Verify the List of EU Member Countries

1. Continuing in the General configuration section, expand ☺ the **Countries Options** section.
2. In the list of **European Union Countries**, verify that each member country of the EU is selected.

To change the default setting, clear the **Use system values** checkbox. Then, hold down the **Ctrl** key, and click each country that you want to add, or remove.

3. When complete, tap **Save Config.**

**Country Options**

**Default Country** [store view] United States  Use system value

**Allow Countries** [website]

- Afghanistan
- Åland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda

Use system value

**Zip/Postal Code is Optional for** [global]

- Guam
- Guatemala
- Guernsey
- Guinea
- Guinea-Bissau
- Guyana
- Haiti
- Heard Island and McDonald Islands
- Honduras
- Hong Kong SAR China

Use system value

**European Union Countries** [global]

- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba
- Australia
- Austria

Use system value

**Top destinations** [global]

- Afghanistan
- Åland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda

*Countries Options*

## Tax Quick Reference

Some tax settings have a choice of options that determines the way the tax is calculated and presented to the customer. To learn more, see: [International Tax Guidelines](#).

### Tax Calculation Methods

Tax calculation method options include Unit Price, Row Total, and Total. The following table explains how rounding (to two digits) is handled for different settings.

#### Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Unit Price	Magento calculates the tax for each item and displays prices tax-inclusive. To calculate the tax total, Magento rounds the tax for each item, and then adds them together.
Row Total	Magento calculates the tax for each line. To calculate the tax total, Magento rounds the tax for each line item and then adds them together.
Total	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.

## Catalog Prices With or Without Tax

The possible display fields vary depending on the calculation method and whether the catalog prices include or exclude taxes. Display fields have two-decimal precision in normal computations. Some combinations of price settings display prices that both include and exclude tax. When both appear on the same line item, it can be confusing to customers, and triggers a **warning**.

### Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Excluding Tax	Using this setting, the base item price is used as it is entered and the tax calculation methods are applied.
IncludingTax	Using this setting, the base item price excluding tax is calculated first. This value is used as the base price, and the tax calculation methods are applied.

**Important!** Changes have been made from earlier versions for EU merchants or other VAT merchants who display prices including tax and operate in several countries with multiple store views. If you load prices with more than two digits of precision, Magento automatically rounds all prices to two digits to ensure that a consistent price is presented to buyers.

## Shipping Prices With or Without Tax

### Tax Configuration Options

SETTING	DISPLAY	CALCULATION
Excluding Tax	Appears without tax.	Normal calculation. Shipping is added to cart total, typically displayed as a separate item.
Including Tax	Can be tax inclusive, or tax can be displayed separately.	Shipping is treated as another item in cart with taxes, using the same calculations.

## Tax Amounts as Line Items

To display two different tax amounts as separate line items, such as GST and PST for Canadian stores, you must set different priorities for the related tax rules. However, in previous tax calculations, taxes with different priorities would automatically be compounded. To correctly display separate tax amounts without an incorrect compounding of the tax amounts, you can set different priorities, and also select the Calculate off subtotal only checkbox. This produces correctly calculated tax amounts that appear as separate line items.

## International Tax Guidelines

### U.S. Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	No, because FPT is not taxed.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	No
Apply Discount	Before tax
Comment	All tax zones are the same priority; ideally, a zone for state and one or more zones for zip code lookup.

### UK B2C Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For merchants marking up supplier invoices (including VAT).

### U.K. B2B Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On item

**U.K. B2B Tax Configuration (cont.)**

TAX OPTION	RECOMMENDED SETTING
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For B2B merchants to provide simpler VAT supply chain considerations. Tax calculation on row is also valid; however, check with your taxing jurisdiction. Setup assumes a merchant is in the supply chain and that goods sold are used by other vendors for VAT rebates and so on. This makes it easy to discern tax by item for faster rebate generation. Note that some jurisdictions require different rounding strategies not currently supported by Magento, and that not all jurisdictions allow item or row level tax.

**Canada Tax Configuration**

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT, description, and apply tax to FPT.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax
Comment	<p>Merchants located in a GST/PST province (Montreal) should create one tax rule and show a combined tax amount.</p> <p>Be sure to consult a qualified tax authority if you have any questions. For information about the tax requirements of specific provinces, see the following:</p> <p><a href="#">Revenu Québec</a></p> <p><a href="#">Government of Saskatchewan</a></p> <p><a href="#">Manitoba Information for Vendors</a></p>



## U.S. Tax Guidelines

These recommended settings can be used for most tax configurations for stores within the United States.

### Tax Classes

TAX CLASS	RECOMMENDED SETTING
Tax Class for Shipping	None

### Calculation Settings

CALCULATION	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Origin
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax

### Default Tax Destination Calculation

SETTING	RECOMMENDED SETTING
Default Country	United States
Default State	State where business is located.
Default Post Code	The postal code that is used in your tax zones.

### Price Display Settings

SETTING	RECOMMENDED SETTING
Display Product Prices in Catalog	Excluding Tax
Display Shipping Prices	Excluding Tax

### Shopping Cart Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax

SETTING	RECOMMENDED SETTING
Display Shipping Amount	Excluding Tax
Display Gift Wrapping Prices	Excluding Tax
Display Printed Card Prices	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

### Orders, Invoices, Credit Memos, Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax
Display Shipping Amount	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

### Fixed Product Taxes

SETTING	RECOMMENDED SETTING
Enable FPT	No, except in California.

# Canadian Tax Guidelines

The following example shows how to set up GST tax rates for Canada and PST tax rates for Saskatchewan, with tax rules that calculate and display the two tax rates. Because this is an example configuration, be sure to verify the correct tax rates and rules for your tax jurisdictions. When setting up taxes, set the store scope to apply the configuration to all applicable stores and websites.

- Fixed product tax is included for relevant goods as a product attribute.
- In Quebec, PST is referred to as TVQ. If you need to set up a rate for Quebec, make sure to use TVQ as the identifier.

**Process Overview:**

Step 1: [Complete the Tax Calculation Settings](#)

Step 2: [Set Up Canadian Goods & Services Tax \(GST\)](#)

Step 3: [Set Up Canadian Provincial Sales Tax \(PST\)](#)

Step 4: [Create a GST Tax Rule](#)

Step 5: [Create a PST Tax Rule for Saskatchewan](#)

Step 6: [Save and Test the Results](#)

## Step 1: Complete Tax Calculation Settings

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Tax**.
2. Click to expand each section, and complete the following settings:

### Tax Calculation Settings

FIELD	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax
Apply Tax On	Custom Price (if available)

### Tax Classes

FIELD	RECOMMENDED SETTING
Tax Class for Shipping	Shipping (shipping is taxed)

### Default Tax Destination Calculation

FIELD	RECOMMENDED SETTING
Default Country	Canada
Default State	(as appropriate)
Default Postal Code	* (asterisk)

### Shopping Cart Display Settings

FIELD	RECOMMENDED SETTING
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero in Tax Subtotal	Yes

### Fixed Product Taxes

FIELD	RECOMMENDED SETTING
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	No

## Step 2: Set Up Canadian Goods & Services Tax (GST)

To print the GST number on invoices and other sales documents, include it in the name of the applicable tax rates. The GST will appear as part of the GST amount on any order summary.

### Manage Tax Zones & Rates

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-GST
Country	Canada
State	* (asterisk)
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

## Step 3: Set Up Canadian Provincial Sales Tax (PST)

Set up another tax rate for the applicable province.

### Tax Rate Information

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-SK-PST
Country	Canada
State	Saskatchewan
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

## Step 4: Create a GST Tax Rule

To avoid compounding the tax and to correctly display the calculated tax as separate line items for GST and PST, you must set different priorities for each rule, and select the “Calculate off subtotal only” checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

### Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-GST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-GST
Priority	0
Calculate off subtotal only	Select this checkbox.
Sort Order	0

### Step 5: Create a PST Tax Rule for Saskatchewan

For this tax rule, make sure to set the priority to 0 and select the "Calculate off subtotal only" checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

#### Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-PST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-SK-PT
Priority	1
Calculate off subtotal only	Select this checkbox.
Sort Order	0

### Step 6: Save and Test the Results

1. When complete, click the **Save Config** button.
2. Return to your storefront, and create a sample order to test the results.

## EU Tax Guidelines

The following example depicts a store based in France that sells > 100k Euros in France and > 100k Euros in Germany.

- Tax calculations are managed at the website level.
- Currency conversion and tax display options are controlled individually at the store view level, (Click the Use Website checkbox to override the default).
- By setting the default tax country you can dynamically show the correct tax for the jurisdiction.
- Fixed product tax is included for relevant goods as a product attribute.
- It might be necessary to edit the catalog to ensure that it shows up in the correct category/website/store view.

### Process Overview:

Step 1: [Create Three Product Tax Classes](#)

Step 2: [Create Tax Rates for France and Germany](#)

Step 3: [Set Up the Tax Rules](#)

Step 4: [Set Up a Store View for Germany](#)

Step 5: [Configure Tax Settings for France](#)

Step 6: [Configure Tax Settings for Germany](#)

### Step 1: Create Three Product Tax Classes

For this example, it is assumed that multiple VAT-Reduced product tax classes are not needed.

1. Create a VAT-Standard product tax class.
2. Create a VAT-Reduced product tax class.
3. Create a VAT-Free product tax class.



## Step 2: Create Tax Rates for France and Germany

Create the following tax rates:

### Tax Rates

TAX RATE	SETTING	
France-StandardVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	20%
France-ReducedVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	5%
Germany-StandardVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	19%
Germany-ReducedVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	7%



### Step 3: Set Up the Tax Rules

Create the following tax rules:

#### Tax Rules

TAX RULE	SETTING
Retail-France-StandardVAT	Customer Class: Retail Customer
	Tax Class: VAT-Standard
	Tax Rate: France-StandardVAT
	Priority: 0
	Sort Order: 0
Retail-France-ReducedVAT	Customer Class: Retail Customer
	Tax Class: VAT Reduced
	Tax Rate: France-ReducedVAT
	Priority: 0
	Sort Order: 0
Retail-Germany-StandardVAT	Customer Class: Retail Customer
	Tax Class: VAT-Standard
	Tax Rate: Germany-StandardVAT
	Priority: 0
	Sort Order: 0
Retail-Germany-ReducedVAT	Customer Class: Retail Customer
	Tax Class: VAT-Reduced
	Tax Rate: Germany-ReducedVAT
	Priority: 0
	Sort Order: 0

### Step 4: Set Up a Store View for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Under the default website, create a store view for **Germany**. Then, do the following:
  - a. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
  - b. In the upper-left corner, set **Default Config** to the French store.
  - c. On the General page, expand  the **Countries Options** section, and set the default country to “France.”
  - d. Complete the locale options as needed.
3. In the upper-left corner, choose the German **Store View**. Then, do the following:
  - a. On the General page, expand  **Countries Options**, and set the default country to “Germany.”
  - b. Complete the locale options as needed.

### Step 5: Configure Tax Settings for France

Complete the following General tax settings:

#### General Settings

FIELD	RECOMMENDED SETTING
<b>TAX CLASSES</b>	
Tax Class for Shipping	Shipping (shipping is taxed)
<b>CALCULATION SETTINGS</b>	
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Including Tax
Shipping Prices	Including Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Including Tax

**General Settings (cont.)**

FIELD	RECOMMENDED SETTING
Apply Tax On	Custom Price (if available)
<b>DEFAULT TAX DESTINATION CALCULATION</b>	
Default Country	France
Default State	
Default Postal Code	* (asterisk)
<b>SHOPPING CART DISPLAY SETTINGS</b>	
Include Tax in Grand Total	Yes
<b>FIXED PRODUCT TAXES</b>	
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	Yes

## Step 6: Configure Tax Settings for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the view to the German store. When prompted to confirm, tap **OK**.
3. In the panel on the left, under **Sales**, choose **Tax**.
4. In the **Default Tax Destination Calculation** section, do the following:
  - a. Clear the **Use Website** checkbox after each field,
  - b. Update the following values to match your site's Shipping Settings **point of origin**.
    - Default Country
    - Default State
    - Default Post Code

This setting ensures that tax is calculated correctly when product prices include tax.



The screenshot shows a configuration panel titled "Default Tax Destination Calculation" with a close button in the top right corner. It contains three rows of settings:

Field	Value	Use Website
Default Country [store view]	France	<input type="checkbox"/>
Default State [store view]	Paris	<input type="checkbox"/>
Default Post Code [store view]	75011	<input type="checkbox"/>



*Default Tax Destination Calculation*

5. When complete, tap **Save Config**.

## Warning Messages

Some combinations of tax-related options might be confusing to customers and trigger a warning. These conditions might occur when the tax calculation method is set to “Row” or “Total,” and the customer is presented with prices that both exclude and include tax, or a tax on an item basis in the cart. Because the tax calculation is rounded, the amount that appears in the cart might differ from the amount that a customer expects to pay.

If your tax calculation is based on a problematic configuration, the following warnings appear:

- 
**Warning.** Tax discount configuration might result in different discounts than a customer might expect for store(s); Europe Website (French), Europe Website (German). Please see source for more details.
- 
**Warning.** Tax configuration can result in rounding errors for store(s): Europe Websites (French), Europe Websites (German).

## Calculation Settings

Use the following tables for reference when configuring tax calculation settings:

### Tax Calculation Method Based On: Excluding Tax

#### Tax Excluded

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Tax Class for Shipping	Shipping (is taxed)		
Excluding tax	OK	OK	OK
Including tax	OK	OK	OK
Including and Excluding tax	OK	OK	<b>Warning</b>

### Catalog Prices: Including Tax

#### Tax Included

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Excluding tax	OK	OK	OK
Including tax	OK	OK	OK
Including and Excluding tax	OK	<b>Warning</b>	<b>Warning</b>

**Calculation Settings**

**Tax Calculation Method Based On** [website] Total  Use system value

**Tax Calculation Based On** [website] Shipping Address  Use system value

**Catalog Prices** [website] Excluding Tax  Use system value  
This sets whether catalog prices entered from Magento Admin include tax.

**Shipping Prices** [website] Excluding Tax  Use system value  
This sets whether shipping amounts entered from Magento Admin or obtained from gateways include tax.

**Apply Customer Tax** [website] After Discount  Use system value

**Apply Discount On Prices** [website] Excluding Tax  Use system value  
Warning: To apply the discount on prices including tax and apply the tax after discount, set Catalog Prices to "Including Tax".

**Apply Tax On** [website] Custom price if available  Use system value

**Enable Cross Border Trade** [website] No  Use system value  
When catalog price includes tax, enable this setting to fix the price no matter what the customer's tax rate.

*Calculation Settings*

## Discount Settings

We strongly recommend that you use the following settings to avoid issues when configuring taxes in relation to discounts.

### Recommended Settings

FIELD	RECOMMENDED SETTING	
Apply Customer Tax	After Discount	
Apply Discount on Prices	US and Canada	Excluding Tax
	EU	Including Tax





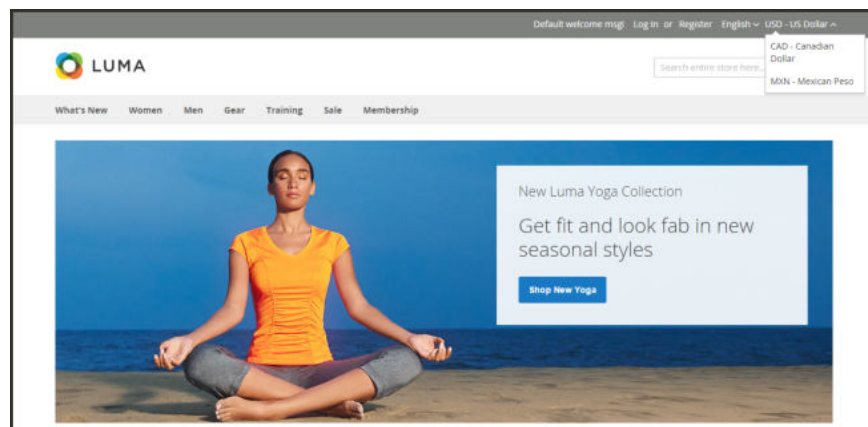
## CHAPTER 85:

# Currency

Magento Open Source gives you the ability to accept currencies from more than two hundred countries around the world. If the store supports multiple currencies, a Currency Chooser appears in the header after currency rates are **updated**.

If you accept payment in multiple currencies, make sure to monitor the currency rate settings, because any fluctuation can impact your profit margin.

Currency symbols appear in product prices and sales documents such as orders and invoices. You can customize the currency symbols as needed, and also set the display of the price separately for each store or view.

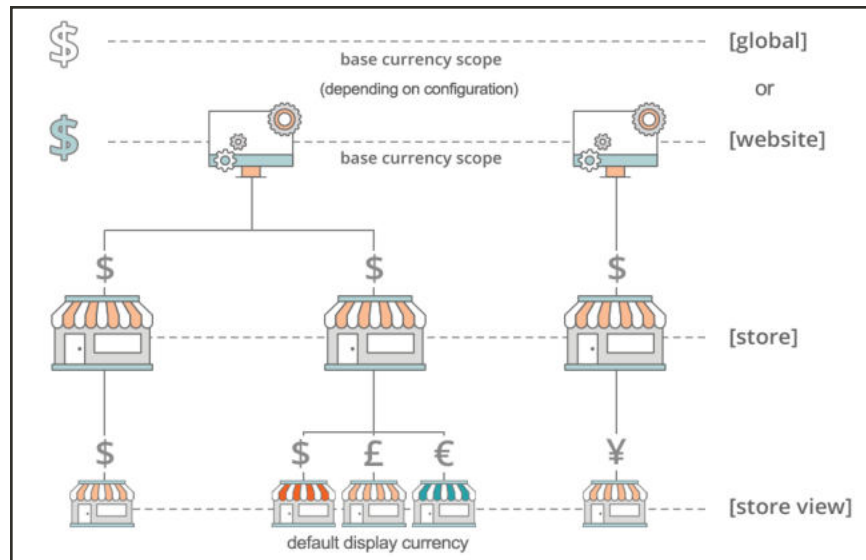


*Currency Chooser*

## Currency Configuration

Before setting up individual currency rates, you must first set the scope of the **base currency**. By default, it is set to global, which applies the base currency setting to the entire **store hierarchy**. If you have a multisite installation of Magento, you can manage multiple base currencies by setting the scope to the website level.

Then, specify which currencies you accept, and the currency that you want to use for the display of **prices** in your store. In the following illustration, the scope of the base currency is set at the website level, so each website can have a different base currency.



*Scope of Base Currency*

**Process Overview:**

- Step 1: **Choose the Accepted Currencies**
- Step 2: **Configure the Import Connection**
- Step 3: **Configure the Scheduled Import Settings**
- Step 4: **Update the Currency Rates**

## Step 1: Choose the Accepted Currencies

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the store view where the configuration applies.
3. In the panel on the left under **General**, choose **Currency Setup**.
4. Expand ☺ the **Currency Options** section, and do the following:
  - a. Set **Base Currency** to the primary currency that you use for online transactions.
  - b. Set **Default Display Currency** to the currency that you use to display pricing in the store view.
  - c. In the **Allowed Currencies** list, select all currencies that you accept as payment in the store view. Make sure to also select your primary currency. (For multiple currencies, hold down the Ctrl key and select each option.)

The screenshot shows the 'Currency Options' configuration panel. It contains three main sections:

- Base Currency** (website): Set to 'US Dollar'. A checkbox for 'Use system value' is checked. Below it, a note states: 'Base currency is used for all online payment transactions. The base currency scope is defined by the catalog price scope ("Catalog" > "Price" > "Catalog Price Scope").'
- Default Display Currency** (store view): Set to 'US Dollar'. A checkbox for 'Use system value' is checked.
- Allowed Currencies** (store view): A scrollable list of currencies including Afghan Afghani, Albanian Lek, Algerian Dinar, Angolan Kwanzas, Argentine Peso, Armenian Dram, Aruban Florin, Australian Dollar, Azerbaijani Manat, and Azerbaijani Manat (1993-2006). A checkbox for 'Use system value' is checked.

### Currency Options


5. When prompted to refresh the cache, tap the **Close** ( ✕ ) box in the upper-right corner of the system message. We'll refresh the cache later.
6. To define the scope of the base currency, do the following:
  - a. In the panel on the left under **Catalog**, choose **Catalog**. Then, scroll down and expand ☺ the **Price** section.
  - b. Set **Catalog Price Scope** to either "Global" or "Website."

The screenshot shows the 'Price' configuration panel. It contains one main section:

- Catalog Price Scope** (website): A dropdown menu set to 'Global'. Below it, a note states: 'This defines the base currency scope ("Currency Setup" > "Currency Options" > "Base Currency").'

### Price


## Step 2: Configure the Import Connection

1. Scroll back up to the top of the page. In the panel on the left under **General**, choose **Currency Setup**.
2. Expand  the **WebserviceX** section.
3. In the **Connection Timeout in Seconds** field, enter the number of seconds of inactivity to allow before the connection times out.



*WebserviceX*

## Step 3: Configure the Scheduled Import Settings

1. Continuing with Currency Setup, expand  the **Scheduled Import Settings** section.
2. To automatically update currency rates, set **Enabled** to "Yes." Then, do the following:
  - a. Set **Service** to the rate provider. The default value is "Webservicex."
  - b. Set **Start Time** to the hour, minute, and second that the rates will be updated according to the schedule.
  - c. To determine how often the rates are updated, set **Frequency** to one of the following:
    - Daily
    - Weekly
    - Monthly
  - d. In the **Error Email Recipient** field, enter the email address of the person who is to receive email notification if an error occurs during the import process. To enter multiple email addresses, separate each with a comma.
  - e. Set **Error Email Sender** to the **store contact** that appears as the sender of the error notification.
  - f. Set **Error Email Template** to the email template used for the error notification.
3. When complete, tap **Save Config**.
4. When prompted to update the cache, tap the **Cache Management** link. Then, refresh the invalid cache.



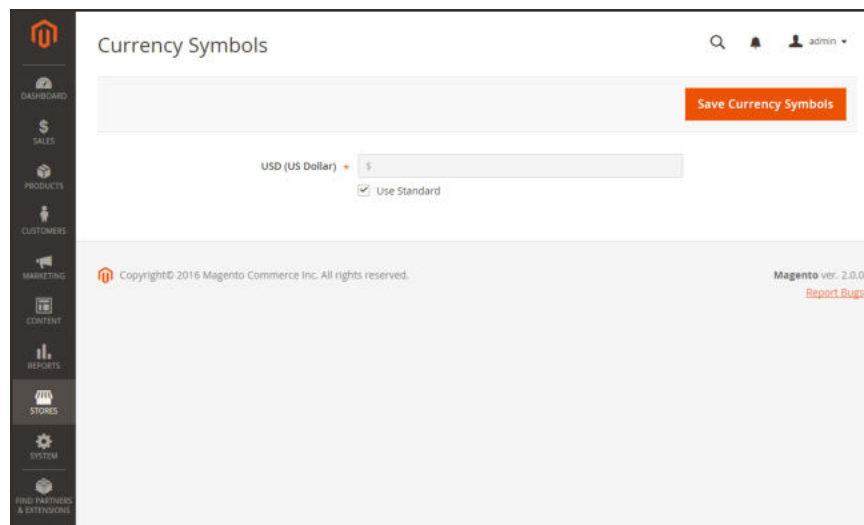
*Refresh Cache*

#### **Step 4: Update the Currency Rates**

The currency rates must be updated with the current values before they go into effect. Follow the instructions to **update the rates** manually or to import the rates automatically.

## Currency Symbols

Manage Currency Symbols gives you the ability to customize the symbol associated with each currency that is accepted as payment in your store.



*Currency Symbols*

### To customize currency symbols:

1. On the Admin sidebar, tap **Stores**. Then under **Currency**, choose **Currency Symbols**.  
Each currency that is currently enabled for your store appears in the Currency list.
2. Enter a custom symbol for each currency you want to use, or mark the **Use Standard** checkbox to the right of each currency.
3. To override the default symbol, clear the **Use Standard** checkbox. Then, enter the symbol that you want to use.

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

4. When complete, tap **Save Currency Symbols**.
5. When prompted to update the cache, tap the **Cache Management** link. Then, refresh any invalid cache.

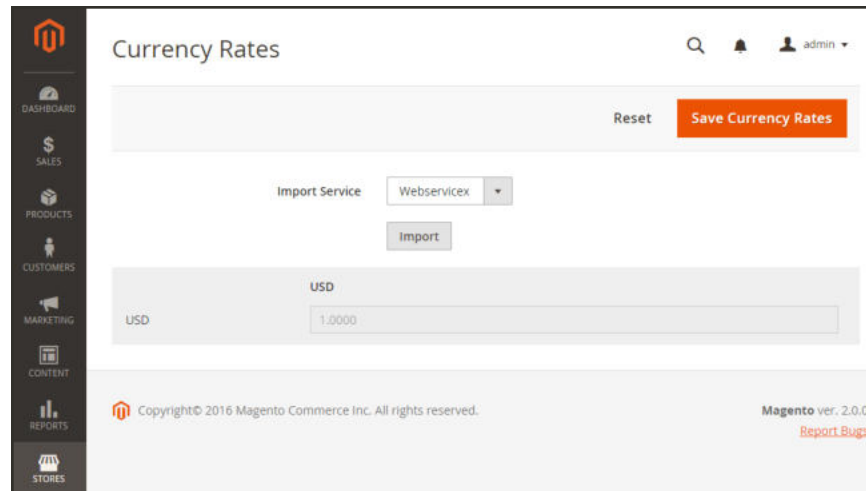


*Refresh Cache*

## Updating Currency Rates

Currency rates can be set manually, or imported into the store. To ensure that your store has the most current rates, you can configure the currency rates to be updated automatically on schedule.

Before importing currency rates, complete the [Currency Rate Setup](#) to specify the currencies that you accept, and to establish the import connection and schedule.



*Updating Currency Rates*

### To manually update a currency rate:

1. On the Admin sidebar, click **Stores**. Then under **Currency**, choose **Currency Rates**.
2. Tap the rate you want to change, and enter the new value for each currency supported.
3. When complete, tap **Save Currency Rates**.

### To import currency rates:

1. On the Admin sidebar, tap **Stores**. Then under **Currency**, choose **Currency Rates**.
2. Set **Import Service** to the currency rate provider. WebserviceX is the default provider.
3. Tap **Import**.

The updated rates appear in the Currency Rates list. If the rates have changed since the last update, the old rate appears below for reference.

4. When complete, tap **Save Currency Rates**.
5. When prompted to update the cache, tap the **Cache Management** link. Then, refresh all invalid caches.

Cache Management

Flush Cache Storage **Flush Magento Cache**

Refresh Submit 13 records found (4 selected)

Cache Type	Description	Tags	Status
<input checked="" type="checkbox"/> Configuration	Various XML configurations that were collected across modules and merged.	CONFIG	INVALIDATED
<input checked="" type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	INVALIDATED
<input checked="" type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	INVALIDATED
<input type="checkbox"/> View files fallback	Paths to view files (e.g., PHTML templates, images, CSS, JS files).	VIEW_FILES_FALLBACK	ENABLED
<input type="checkbox"/> View files pre-processing	Paths to pre-processed view files (e.g. CSS files with fixed paths or generated from LESS files).	VIEW_FILES_PREPROCESSING	ENABLED
<input type="checkbox"/> Collections Data	Collection data files.	COLLECTION_DATA	ENABLED
<input type="checkbox"/> Database DDL operations	Results of DDL queries, such as describing tables or indexes.	DB_DDL	ENABLED
<input type="checkbox"/> EAV types and attributes	Entity types declaration cache.	EAV	ENABLED
<input checked="" type="checkbox"/> Page Cache	Full page caching.	FPC	INVALIDATED
<input type="checkbox"/> Translations	Translation files.	TRANSLATE	ENABLED
<input type="checkbox"/> Integrations Configuration	Integration configuration file.	INTEGRATION	ENABLED
<input type="checkbox"/> Integrations API Configuration	Integrations API configuration file.	INTEGRATION_API_CONFIG	ENABLED
<input type="checkbox"/> Web Services Configuration	REST and SOAP configurations, generated WSDL file.	WEBSERVICE	ENABLED

*Refresh Invalid Caches*

### To import currency rates on schedule:

1. Make sure that **Cron** is enabled for your store.
2. Complete the **Currency Rate Setup** to specify the currencies that you accept, and to establish the import connection and schedule.
3. To verify that the rates are imported on schedule, check the Currency Rates list. Then, wait for the duration of the frequency setting established for the schedule, and check the rates again.





## CHAPTER 86:

# Attributes

Magento uses attributes to manage the information associated with products, customers, and product ratings. Attributes are pieces of information that might appear as fields in forms, reports, product reviews, [layered navigation](#), and email messages. Some attributes are built into the system, and others can be created to address specific needs.

To learn more about creating and managing product attributes, see:

- [Product Attributes](#)
- [Attribute Sets](#)

To learn more about importing and exporting attributes, see:

- [Data Transfer](#)
- [Using Product Attributes](#)
- [Product Attribute Reference](#)
- [Customer Attribute Reference](#)

## Product Attributes

Product attribute properties determine how an attribute can be used in the catalog, its appearance and behavior in the store, and in data transfer operations. The properties and labels associated with each attribute determine how it can be used, and its presentation in the store.

- Properties**                      The Properties section includes both basic and advanced attribute properties.
- Labels**                              The label identifies an attribute in the Admin and also in the storefront of each store view. If your store is available in multiple languages, you can enter a different translated label for each language.
- Storefront Properties**              The Storefront Properties determine how an attribute can be used in your store, its appearance, and behavior. You can specify if attributes are available for search, layered navigation, product comparisons, price rules, and sorting. For text attributes, you can enable the WYSIWYG editor, and determine if HTML tags can be used to format the values.

To learn how to use attributes while creating a product, see: [Product Attributes](#).

Attribute Code	Default label	Required	System	Visible	Scope	Searchable	Use in Layered Navigation	Comparable
activity	Activity	No	No	Yes	Global	No	Filterable (with results)	Yes
category_gear	Category Gear	No	No	Yes	Global	No	Filterable (with results)	No
category_sbs	Categories	No	Yes	No	Global	No	No	No
climate	Climate	No	No	Yes	Global	No	Filterable (with results)	No
collar	Collar	No	No	Yes	Global	No	Filterable (with results)	No
color	Color	No	No	No	Global	No	Filterable (with results)	No
cost	Cost	No	No	No	Web Site	No	No	No
country_of_manufacture	Country of Manufacture	No	Yes	No	Web Site	No	No	No
custom_design	Custom Design	No	Yes	No	Store View	No	No	No
custom_design_from	Active From	No	Yes	No	Store View	No	No	No

*Product Attributes Page*

## Property Descriptions

PROPERTY	DESCRIPTION																				
<b>ATTRIBUTE PROPERTIES</b>																					
Default Label	The label that identifies the attribute during data entry.																				
Catalog <b>Input Type</b> for Store Owner	Determines the data type and input control that is used to manage the product from the store Admin. Options include: <table border="0"> <tr> <td>Text Field</td> <td>A single line input field for text.</td> </tr> <tr> <td>Text Area</td> <td>A multiple-line input field that can display paragraphs of text formatted with HTML.</td> </tr> <tr> <td>Text Editor</td> <td>Adds a fully-functioning text editor at the attribute location.</td> </tr> <tr> <td>Date</td> <td>An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.</td> </tr> <tr> <td>Yes/No</td> <td>A drop-down list with predefined options of "Yes" and "No."</td> </tr> <tr> <td>Multiple Select</td> <td>A drop-down list of options that allows multiple selections. To select more than one option, hold down the Ctrl key and click each item.</td> </tr> <tr> <td>Dropdown</td> <td>A drop-down list of options that allows only one selection.</td> </tr> <tr> <td>Price</td> <td>An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.</td> </tr> <tr> <td>Media Image</td> <td>An additional image that can be included in the attribute set of a product.</td> </tr> <tr> <td>Fixed Product Tax</td> <td>An input type that gives you the ability to define FPT rates based on the requirements of your locale.</td> </tr> </table>	Text Field	A single line input field for text.	Text Area	A multiple-line input field that can display paragraphs of text formatted with HTML.	Text Editor	Adds a fully-functioning text editor at the attribute location.	Date	An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.	Yes/No	A drop-down list with predefined options of "Yes" and "No."	Multiple Select	A drop-down list of options that allows multiple selections. To select more than one option, hold down the Ctrl key and click each item.	Dropdown	A drop-down list of options that allows only one selection.	Price	An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.	Media Image	An additional image that can be included in the attribute set of a product.	Fixed Product Tax	An input type that gives you the ability to define FPT rates based on the requirements of your locale.
Text Field	A single line input field for text.																				
Text Area	A multiple-line input field that can display paragraphs of text formatted with HTML.																				
Text Editor	Adds a fully-functioning text editor at the attribute location.																				
Date	An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.																				
Yes/No	A drop-down list with predefined options of "Yes" and "No."																				
Multiple Select	A drop-down list of options that allows multiple selections. To select more than one option, hold down the Ctrl key and click each item.																				
Dropdown	A drop-down list of options that allows only one selection.																				
Price	An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.																				
Media Image	An additional image that can be included in the attribute set of a product.																				
Fixed Product Tax	An input type that gives you the ability to define FPT rates based on the requirements of your locale.																				

## Property Descriptions (cont.)

PROPERTY	DESCRIPTION
Visual Swatch	Displays a swatch that depicts the color, texture, or pattern of a configurable product. A visual swatch can be filled with a hexadecimal color value, or display an uploaded image that represents the color, material, texture, or pattern of the option.
Text Swatch	A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values.
Values Required	To require that a value to be entered in this field before the record can be saved, set Values Required to "Yes." Options include: Yes / No

### ADVANCED ATTRIBUTE PROPERTIES

Attribute Code	(Required) A unique identifier for internal use. The Attribute Code must begin with a letter, but can include a combination of lowercase letters (a-z) and numbers (0-9). The code must be less than thirty characters in length and cannot include any special characters or spaces, although an underscore ( _ ) can be used to indicate a space.
Scope	Limits the use of an attribute to a specific store view or website. Options include: Store View Website Global
Default Value	Assigns a starting value to the attribute to help during data entry. To assign a default value for Multiple Select or Dropdown input types, see: <a href="#">Creating Product Attributes</a> . <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.</div>
Unique Value	Requires the attribute value to be different from all other values entered in the same attribute, within the context of the scope setting. Unique value should be enabled for any attribute that is used as an ID number. For example, because SKU is used to identify products throughout the hierarchy, it has a unique value with a global scope. Options: Yes / No

### Property Descriptions (cont.)

PROPERTY	DESCRIPTION
Input Validation for Store Owner	Performs a validation check of the data entered in the field, based on the following options: None Decimal Number Integer Number Email URL Letters Letters (a-z, A-Z) or Numbers (0-9)
Add to Column Options	Determines if the column appears in the product grid. Options: Yes / No
Use in Filter Options	Determines if the attribute is used as a filter control at the top of columns in the grid. Options: Yes / No

### Storefront Property Descriptions

PROPERTY	DESCRIPTION				
Use in Search	Select "Yes" if you want people to be able to search the catalog based on the value of this attribute. Options include: Yes / No The following attributes appear when Search is enabled: <table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Search Weight</td> <td>To weight the search results, set Search Weight to a number from 1 to 10.</td> </tr> <tr> <td>Visible in Advanced Search</td> <td>Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No</td> </tr> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; background-color: #f9f9f9;">                     Using too many attributes can slow down search.                 </div>	Search Weight	To weight the search results, set Search Weight to a number from 1 to 10.	Visible in Advanced Search	Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No
Search Weight	To weight the search results, set Search Weight to a number from 1 to 10.				
Visible in Advanced Search	Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No				
Comparable on Storefront	Select "Yes" to include this attribute as a row in the Compare Products report. Options include: Yes / No				
Use In Layered Navigation	(Dropdown, Multiple Select and Price input types only) Includes the attribute as a filter in the "Shop By" section of layered navigation. Options include:				

## Storefront Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	<p>No</p> <p>The attribute is not available to be used as a filter in layered navigation.</p>
	<p>Filterable (with results)</p> <p>Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters.</p> <p>The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.</p>
	<p>Filterable (no results)</p> <p>Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.</p>
Use In Search Results Layered Navigation	To include the attribute in the layered navigation for search results, select "Yes." Options include: Yes / No
Position	<p>Determines the position of the attribute in layered navigation in relation to other filterable attributes.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>The Position field will be grayed out by default. You must <b>save the attribute</b> before you can modify this setting.</p> </div>
Use for Promo Rule Conditions	To make the attribute available for use in price rules, select "Yes." Options include: Yes / No
Allow HTML Tags on Storefront	(Text Field and Text Area input types only) To be able to format the attribute value with HTML tags, select "Yes." Options include: Yes / No
Visible on Catalog Pages on Storefront	(Simple and virtual products only) To include the attribute on the Additional Information tab of the product page, select "Yes." Options include: Yes / No
Used in Product Listing	Depends on the theme. To include the attribute in product summaries that appear in catalog listings, select "Yes."

**Storefront Property Descriptions (cont.)**

PROPERTY	DESCRIPTION
Used for Sorting in Product Listing	Depending on theme, includes the attribute as a “Sort By” option for catalog listings. Options: Yes / No

# System



## Contents

In this section of the guide, you'll learn how to import and export data, manage security and permissions, install extensions and integrations, and use the many tools that are available to maintain your store at peak performance.

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  - Data Validation
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- Export
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  - Advanced Pricing
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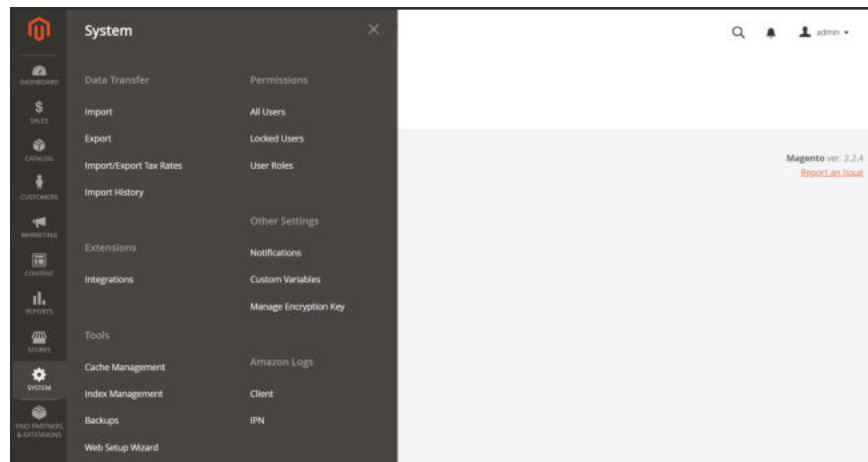
#### Tools

- Cache Management
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  - Frontend Development Workflow
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  - Module Manager
  - System Upgrade
  - System Configuration

## CHAPTER 87:

# System Menu

The System Menu includes tools to import and export data, install extensions, manage system caches and indexes, manage permissions, backups, system notifications, and custom variables.

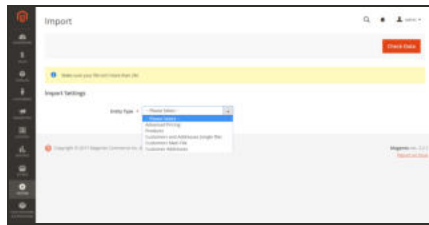


*System Menu*

### To display the System menu:

On the Admin sidebar, tap **System**.

## Menu Options



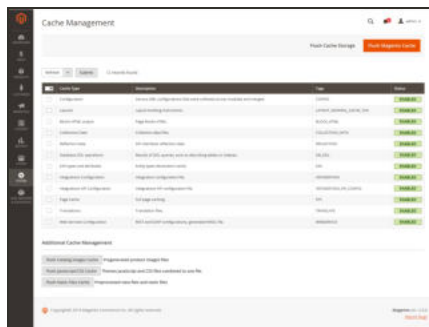
### Data Transfer

The Import and Export tools give you the ability to manage multiple records in a single operation. You can import new items, and also update, replace, and delete existing products and tax rates.



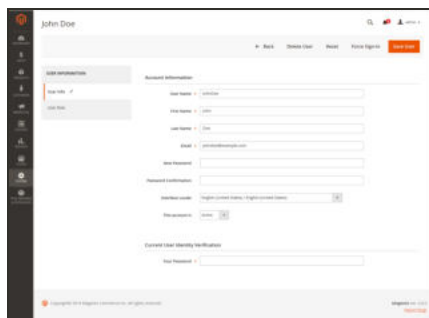
### Extensions

Manage integrations and extensions for your store.



### Tools

Manage your system resources, including cache and index management, backups, and installation settings.



### Permissions

Magento uses roles and permissions to create different levels of access for Admin users, which gives you the ability to grant permission on a “need to know” basis to people who work on your site.



### Other Settings

Manage the **notifications** in your inbox, create **custom variables**, and generate a new **encryption key**.



## Amazon Logs

---

Provides access to Client and IPN logs, if enabled in the **Developer Options** section of the **Amazon Pay** configuration.





## CHAPTER 88:

# Data Transfer

The Import and Export tools give you the ability to manage multiple records in a single operation. You can not only import new items, but also update, replace, and delete existing sets of products. For example, you can add new products to your inventory, update product data and advanced price data, and replace a set of existing products with new products. If you have a large catalog of products, it's much easier to export the data, edit the data in a spreadsheet, and import it back into your store.

- [Working with CSV Files](#)
- [Import](#)
- [Export](#)
- [Product Attribute Reference](#)
- [Customer Attribute Reference](#)

## Working with CSV Files

The comma-separated-value (CSV) file format is used as the basis of data transfer operations, and is supported by all spreadsheet and database applications. The following file types are supported for import and export:

Import	CSV and ZIP (a compressed CSV file.)
Export	CSV

**Important!** We recommend that you use a program that supports UTF-8 encoding, such as [Notepad++](#) or [OpenOffice Calc](#), to edit CSV files. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento. If you work on the Mac, you can save your data in the CSV (Windows) format.

CSV files have a specific structure that must match the database. Each column heading corresponds to the Attribute Code of the field that is represented by the column. To ensure that the column headings can be read by Magento, first export the data from your store as a CSV file. You can then edit the data and re-import it into Magento.

If you open an exported CSV file in a text editor, you will see that values are separated by commas, and multiple values are enclosed in double-quotes. During import, you can specify a custom separator character, although a comma is the default.

### Product CSV Structure

A full export of the product database contains information about each product in the catalog, and the relationships between them. Each record has fixed selection of columns that corresponds to the attributes in the catalog, although the order of the attributes is ignored during the import process.

	A	B	C	D	E	F	G	H
1	file	store_view_code	attribute_set_code	product_type	categories	product_website	name	description
2	24-WB001		Bag	simple	Default	Category/Gear/Bag	Category/Gear/Bag	base
3	24-WB004		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	base
4	24-WB003		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base
5	24-WB005		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	Category/Collections/New
6	24-WB006		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	Category/Collections/New
7	24-WB002		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base
8	24-WB002		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base
9	24-WB001		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base
10	24-WB002		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base
11	24-WB005		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	Category/Collections/Em
12	24-WB006		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	Category/Collections/Em
13	24-WB003		Bag	simple	Default	Category/Gear/Default	Category/Gear/Bag	base
14	24-WB007		Bag	simple	Default	Category/Collections/Default	Category/Gear/Default	Category/Collections/New
15	24-WB004		Bag	simple	Default	Category/Collections/Default	Category/Gear/Bag/Default	Category/Collections/Performance
16	24-UG006		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
17	24-UG007		Gear	simple	Default	Category/Collections/Default	Category/Gear/Default	Category/Gear/Fitness
18	24-UG004		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
19	24-UG002		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
20	24-UG005		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
21	24-UG001		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
22	24-WG004		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
23	24-WG008		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
24	24-UG003		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment
25	24-UG008		Gear	simple	Default	Category/Gear/Default	Category/Gear/Fitness	Equipment

*Exported Product CSV in OpenOffice Calc*

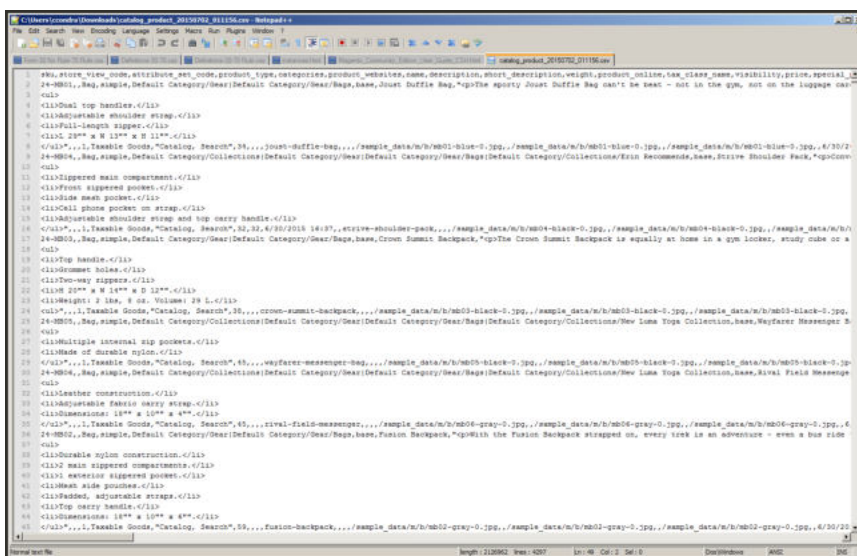
The first row of the table contains the names of each attribute, which are used as column headers. The remaining rows describe the individual product records. Any row that begins with a value in the SKU column is the beginning of a new product record. A single product might include several rows that contain information about multiple images or product options. The next row that has a value in the SKU column begins a new product.

The category column contains a path for each category to which the product is assigned. The path includes the root category, followed by a forward slash (/) between each level. By default, the pipe “|” character is used to separate different category paths. For example:

Default Category/Gear|Default Category/Gear/Bags.

To import data, you need to include only the SKU and any columns with changes. Any blank columns are ignored during the import process. It is not possible to add attributes during the import process. You can include only existing attributes.

For a detailed description of each product attribute, see: [Product Attribute Reference](#).



Exported Product CSV in Notepad++

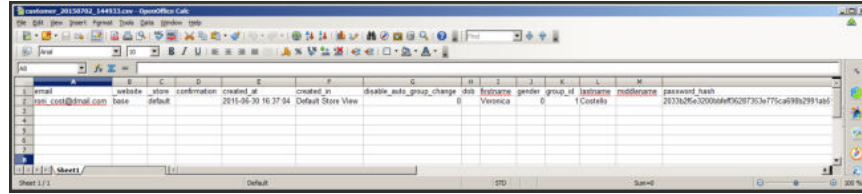
### CSV Product Structure

COLUMN NAME	DESCRIPTION
<u>&lt;name&gt;</u>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not product attributes.
<attribute name>	Column headers with an attribute code or field name identify the column of data. A column might represent a system attribute, or one that was created by the store administrator.



## Customer CSV Structure

The customers CSV file contains customer information from the database, and has the following structure:

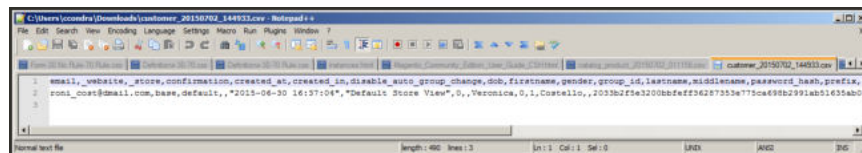


*Exported Customer CSV in OpenOffice Calc*

The first row of the table contains the names of the attribute columns (which are the same as attribute codes). There are two types of column names, as shown in the following table. Other rows contain attribute values, service data, and complex data. Each row with non-empty values in the “email” and “\_website” columns starts the description of the subsequent customer. Each row can represent customer data with or without address data, or the address data only. In case a row contains only the address data, values in the columns, related to the customer profile, will be ignored and may be empty.

To add or replace more than one address for a customer, in the import file add a row for each new address with empty customer data and the new or updated address data below the customer data row.

For a detailed description of each customer attribute, see: [Customer Attribute Reference](#).



*Exported Customer CSV in Notepad++*

## CSV Customer Structure

COLUMN NAME	DESCRIPTION
_ <code>&lt;name&gt;</code>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not customer attributes.
<code>&lt;attribute name&gt;</code>	The names of the columns with values of both system-created attributes, and attributes created by the store administrator.

## Data Validation

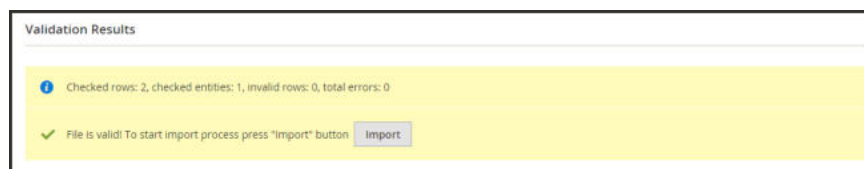
All data must pass validation before it can be imported into the store, to ensure that the values are consistent with the system database. Validation begins when you tap the Check Data button. During the process, all entities in the import file are verified for the following:

Attributes	Column header names are verified to ensure that they match the corresponding attributes in the system database. The value of each attribute is checked to ensure that it meets the requirements of the data type (decimal, integer, varchar, text, and datetime)
Complex Data	Values that originate from a defined set, such as a drop-down or multiple select input type, are verified to ensure that the values exist in the defined set.
Service Data	The values in service data columns are verified to ensure that the properties or complex data values are consistent with what is already defined in the system database.
Required Values	For new entities, the presence of required attribute values in the file is checked. For existing entities, there is no need to re-check the existence of required attribute values.
Separators	Although the separators aren't visible when viewed in a spreadsheet, data values in a CSV file are separated by comma, and text values are enclosed in double-quotes. During the validation process, the separators are verified, and each set of quotes that enclose character strings is verified to be formatted correctly.

The results of the validation appear in the Validation Results section, and include the following information:

- The number of entities checked
- The number of invalid rows
- The number of errors found

If the data is valid, an “Import Success” message appears.



*File is Valid!*

If validation fails, read the description of each error, and correct the problem in the CSV file. For example, if a row contains an invalid SKU, the import process stops, and that row, and all subsequent rows are not imported. After correctly the problem, import the data again. If many errors are encountered, it might take several attempts to pass validation.

## Data Validation Messages

### MESSAGES

#### DATA VALIDATION

---

- Product with specified SKU not found in rows: 1
  - URL key for specified store already exists
  - '7z' file extension is not supported
  - 'txt' file extension is not supported
- 

#### ERRORS

---

- Wrong field type. Type in the imported file %decimal%, expected type is %text%.
- Value is not allowed. Attribute value does not exist in the system.
- Field %column name% is required.
- Wrong value separator is used.
- Wrong encoding used. Supported character encoding is UTF-8 and Windows-1252.
- Imported file does not contain SKU field.
- SKU does not exist in the system.
- Column name %column name% is invalid. Should start with a letter. Alphanumeric.
- Imported file does not contain a header.
- %website name% website does not exist in the system.
- %storeview name% storeview does not exist in the system.
- Imported attribute %attribute name% does not exist in the system.
- Imported resource (image) could not be downloaded from external resource due to timeout or access permissions.
- Imported resource (image) does not exist in the local media storage.
- Product creation error displayed to the user equal to the one seen during manual product save.
- Advanced Price creation error displayed to the user equal to the one seen during the manual product save.
- Customer creation error displayed to the user equal to the one seen during the manual customer save.

## Import

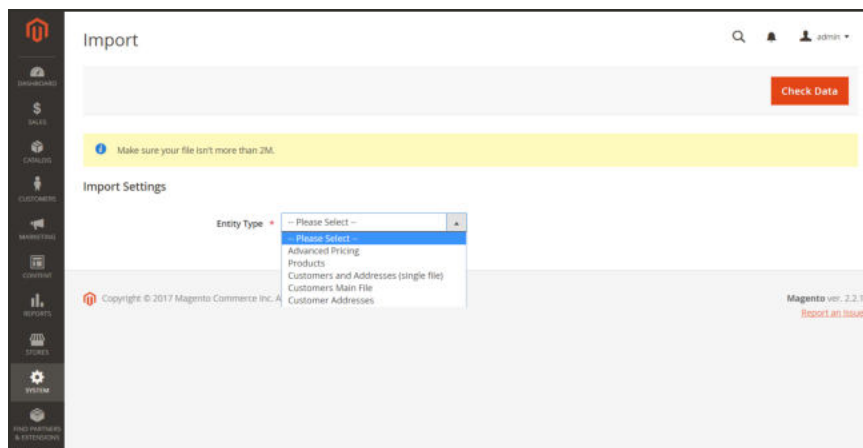
Data for all product types can be imported into the store. In addition, you can import products, advanced pricing data, customer data, customer address data, and product images. Import supports the following operations:

- Add/Update
- Replace
- Delete

The size of the import file is determined by the settings in the `php.ini` file on the server. The system message on the Import page indicates the current size limit. The default size is 2MB.

Special characters — such as the equal sign, greater and less than symbols, single and double quotes, backslash, pipe, and ampersand symbols — can cause problems during data transfer. To ensure that such special characters are correctly interpreted, they can be marked as an “escape sequence.” For example, if the data includes a string of text such as `code="str",code="str2"`, choosing to enclose the text in double quotes ensures that the original double quotes are understood to be part of the data. When the system encounters a double set of double quotes, it understands that the outer set of double quotes is enclosing the actual data.

When importing product data, new product data is added to existing product data entries in the database. All fields except SKU can be updated through import. All existing product data is replaced with the imported new data. Exercise caution when replacing data. All existing product data will be completely cleared and all references in the system will be lost.



*Import*

### Process Overview:

Step 1: [Prepare the Data](#)

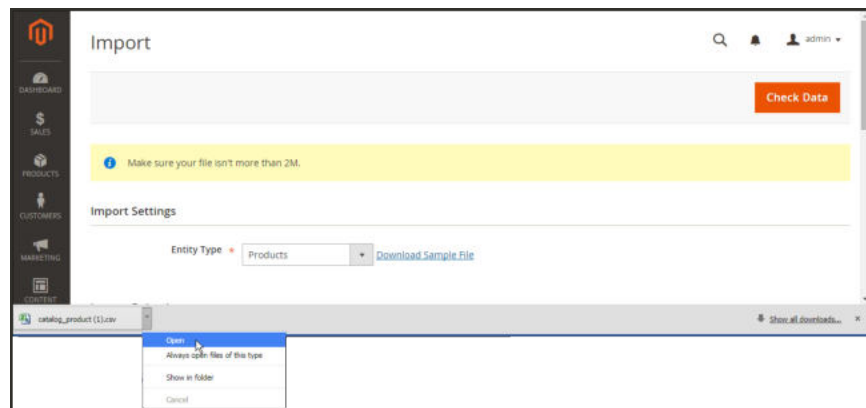
Step 2: [Choose the Import Behavior](#)

Step 3: **Identify the Import File**

Step 4: **Check the Import Data**

### Step 1: Prepare the Data

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import**.
2. Under **Import Settings**, set **Entity Type** to one of the following:
  - Advanced Pricing
  - Products
  - Customers and Addresses
  - Customers Main File
  - Customer Addresses
3. Tap **Download Sample File**. Then on the download menu in the lower-left corner of your browser window, choose **Open**.



*Download Sample File*

The sample file includes column headings with placeholder data for example product types.

sku	website_code	store_view_code	attribute_set_code	product_type	name	description	short_description	weight
simplesku1	base	default	default	simple	Simple	Product		1 Simple
simplesku2withcustomoptions	base	default	default	simple	Simple	Product		2 With -> <- -> <- Line 1-> <- -> <- Line 2-> <- -> <- Line 3-> <-
configurablesku1	base	default	default	configurable	Configurable	Product		1 -> <- -> <- -> <- Line 1-> <- -> <- Line 2-> <- -> <- Line 3-> <- -> <- Bundle Product 1 Description-> <-
bundlesku1	base	default	default	bundle	Bundle	Product		1 -> <- -> <- -> <- Line 1-> <- -> <- Line 2-> <- -> <- Line 3-> <- -> <- Bundle Product 1 Description-> <-
bundlesku2	base	default	default	bundle	Bundle	Product		2 -> <- -> <- -> <- Line 1-> <- -> <- Line 2-> <- -> <- Line 3-> <- -> <- Bundle Product 2 Description-> <-
groupedsku1	base	default	default	grouped	Grouped	Product		1 -> <- -> <- Grouped Product 1 Description-> <-

*Downloaded Sample File*

4. Examine the structure of the sample file. As you prepare your CSV import file, make sure that the column headings are spelled correctly.
5. Verify that the size of your import file does not exceed the limit shown in the message.



6. If the import data includes paths to product images, make sure that the image files have been uploaded to the appropriate location. The default location on the Magento server is: `pub/media/import`.

If the images reside on an external server, make sure that you have the full URL to the directory that contains the images.

## Step 2: Choose the Import Behavior

1. Set **Import Behavior** to one of the following:
  - Add/Update

For products, you can update all fields except SKU through import.

  - Replace
  - Delete
2. To determine what happens when an error is encountered when importing data, choose one of the following:
  - Stop on Error
  - Skip error entries

Then in the **Allowed Errors Count** field, enter the number of errors that can occur before the import is canceled. The default value is 10.

3. Do the following:
  - a. Accept the default value of a comma (,) for the **Field separator**.
  - b. Accept the default value of a comma (,) for the **Multiple value separator**.  
 In a CSV file, a comma is the default separator. To use a different character, make sure that the data in the CSV file matches the character that you specify.
  - c. If you want to enclose any special characters that might be found in the data as an “escape sequence,” mark the **Fields Enclosure** checkbox.

**Import Behavior**

Import Behavior \* Add/Update ?  
New product data is added to the existing product data for the existing entries in the database. All fields except sku can be updated.

\* Stop on Error

Allowed Errors Count \* 10  
Please specify number of errors to halt import process

Field separator \* .

Multiple value separator \* .

Empty attribute value constant \* \_EMPTY\_VALUE\_

Fields enclosure

*Import Behavior*

### Step 3: Identify the Import File

1. Tap **Choose File** to select the file to import.
2. Find the CSV file that you prepared to import, and tap **Open**.
3. In the **Images File Directory** field, enter the relative path to the location on the Magento server where uploaded images are stored. For example: var/import.

To learn more about importing product images, see: [Importing Product Images](#).

**File to Import**

Select File to Import \* **Choose File** No file chosen  
File must be saved in UTF-8 encoding for proper import

Images File Directory

For Type "Local Server" use relative path to Magento installation, e.g. var/export, var/import, var/export/some/dir

*File to Import*

### Step 4: Check the Import Data

1. In the upper-right corner, tap **Check Data**.
2. Then, wait a few moments for the validation process to complete. If the import data is valid, the following message appears:

**Validation Results**

! Checked rows: 2, checked entities: 1, invalid rows: 0, total errors: 0

✓ File is valid! To start import process press "Import" button **Import**

*File is Valid!*



3. If the file is valid, tap **Import**. Otherwise, correct each problem with the data that is listed in the message, and try to import the file again.
4. The import process continues to the end of the data, unless an error is encountered.

If an error message appears in the Validation Results, correct the problem in the data, and import the file again.



*URL Key Already Exists*

A message appears when the import is complete.

### Import Behavior

OPERATION	DESCRIPTION
Add/Update	<p>New product data is added to the existing product data for the existing entries in the database. All fields except sku can be updated.</p> <p>New tax classes that are specified in the import data are created automatically.</p> <p>New product categories that are specified in the import file are created automatically.</p> <p>New SKUs that are specified in the import file are created automatically</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">                     For products, you can update all fields except SKU through import.                 </div>
Replace	<p>The existing product data is replaced with new data.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">                     Exercise caution when replacing data because the existing product data will be completely cleared and all references in the system will be lost.                 </div> <p>If a SKU in the import data matches the SKU of an existing entity, all fields, including the SKU are deleted, and a new record is created using the CSV data. An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</p>
Delete	<p>Any entities in the import data that already exist in the database are deleted from the database.</p> <p>Delete ignores all columns in the import data, except for SKU. You can disregard all other attributes in the data.</p> <p>An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</p>

## Import History

Maintains a record of data that has been imported into your store, including the start date and time, user, execution time, and a link to the imported file.

### To view the import history:

1. On the Admin sidebar, tap **System**.
2. Under **Data Transfer**, choose **Import History**.

ID	Start Date&Time	User	Imported File	Error File	Execution Time	Summary
1	Dec 4, 2015, 11:45:41 AM		<a href="#">Download</a>		05:00:36	Created: 1994, Updated: 0, Deleted: 0

*Import History*

## Importing Product Images

Multiple product images of each type can be imported into Magento, and associated with a specific product. The path and file name of each product image is entered in the CSV file, and the image files to be imported are uploaded to the corresponding path on the Magento server or external server.

Magento creates its own directory structure for product images that is organized alphabetically. When you export product data with existing images to a CSV file, you can see the alphabetized path before the file name of each image. However, when you import new images, you don't need to specify a path, because Magento manages the directory structure automatically. Just make sure to enter the relative path to the import directory before the file name of each image to be imported.

To upload images, you must have login credentials and correct permissions to access to the Magento folder on the server. With the correct credentials, you can use any SFTP utility to upload the files from your desktop computer to the server.

Before you try to import a large amount of images, review the steps in the import method that you want to use, and run through the process with a few products. After you understand how it works, you'll feel confident importing large quantities of images.

**Important!** We recommend that you use a program that supports UTF-8 encoding to edit CSV files, such as [Notepad++](#) or [OpenOffice Calc](#). Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento.

### Method 1: Import Images from the Local Server

1. On the Magento server, upload the image files to the `pub/media/import` folder. This is the default folder for importing product images.

```
[magento installation folder]/pub/media/import
```

You can use a different folder on the Magento server, as long as the path to the folder is specified during the import process.

2. In the CSV data, enter the name of each image file to be imported on the correct row, by sku, and in the correct column according to image type (`base_image`, `small_image`, `thumbnail_image`, or `additional_images`).

For images in the default import folder (`/pub/media/import`), do not include the path before the filename in the CSV data.

The CSV file must include only the sku column and the related image columns.

1	sku	base_image	base_image_label	small_image	small_image_label	thumbnail_image	thumbnail_image_label
2	1	membership.png	Membership	membership.png	Membership	membership.png	Membership
3							
4							

*CSV Import Image from Default Location*

3. Follow the instructions to **import** the data.

After selecting the file to import, enter the relative path following **Images File Directory**:

/pub/media/import

*Images File Directory*

If importing multiple images for a single sku, insert a blank row below the sku, and enter the additional image file names in the appropriate columns. The additional rows are understood to belong to the parent sku.

### Method 2: Import Images from External Server

1. Upload the images to be imported to the designated folder on the external server.
2. In the CSV data, enter the full URL for each image file in the correct column by image type (base\_image, small\_image, thumbnail\_image, or additional\_images).

http://example.com/images/image.jpg

3. Follow the instructions to **import** the data.

## Import Guidelines

### New Entities

- Entities are added with the attribute values specified in the CSV file.
- If there is no value, or there is a non-valid value, for a required attribute with no default value set, then the entity (the corresponding row or rows) cannot be imported.
- If there is no value, or there is a non-valid value, for a required attribute with the default value set, then the entity (the corresponding row or rows) is imported, and the default value is set for the attribute.
- If the complex data is not valid, then the entity (the corresponding row or rows) cannot be imported.

### Existing Entities

- For attributes that are not complex data, the values from the import file, including the empty values for the non-required attributes, replace the existing values.
- If there is no value, or there is a non-valid value, for a required attribute, then the existing value is not replaced.
- If the complex data for the entity is invalid, the entity (the corresponding row or rows) cannot be imported, except the case, when Delete Entities was selected in the Import Behavior drop-down menu.

## Complex Data

If an attribute that is specified in the import file already exists, and its value is derived from a defined set of values, the following applies:

- If the value is not already included in the defined set of values, the row can be imported and a default value, if defined, is set for the attribute.
- If the value is already included in the defined set, the corresponding row cannot be imported.

If an attribute name is specified in the import file but is not yet defined in the system, it is not created, and its values are not imported.

## Invalid Files

- A file cannot be imported if all rows are invalid.
- A non-existing service data or complex data name is specified in the import file, such as a column with a `_<non-existing name>` heading.


## Export

The best way to become familiar with the structure of your database is to export the data and open it in a spreadsheet. Once you become familiar with the process, you'll find that it is an efficient way to manage large amounts of information.

Special characters — such as the equal sign, greater and less than symbols, single and double quotes, backslash, pipe, and ampersand symbols — can cause problems during data transfer. To ensure that such special characters are correctly interpreted, they can be marked as an “escape sequence.” For example, if the data includes a string of text such as `code="str",code="str2"`, choosing to enclose the text in double quotes ensures that the original double quotes are understood to be part of the data. When the system encounters a double set of double quotes, it understands that the outer set of double quotes is enclosing the actual data.

### To export data:

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Export**.
2. In the **Export Settings** section, specify the following:
  - a. Set **Entity Type** to one of the following:
    - Products
    - Customers Main File
    - Customer Addresses
  - b. Accept the default **Export File Format** of “CSV.”
  - c. If you want to enclose any special characters that might be found in the data as an “escape sequence,” mark the **Fields Enclosure** checkbox.



Export Settings

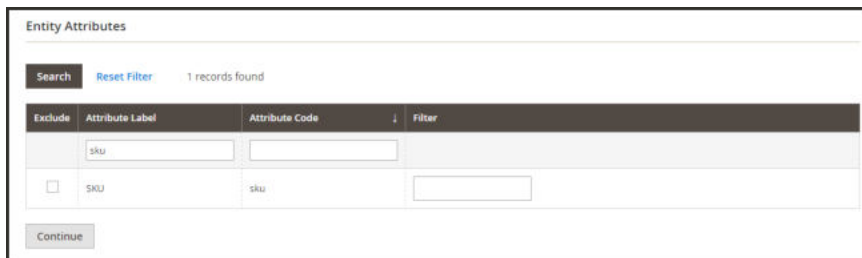
Entity Type

Export File Format

Fields Enclosure

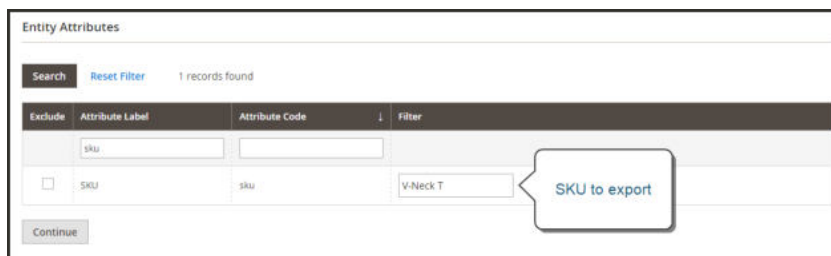
*Export Settings*

3. The Entity Attributes section lists all the available attributes in alphabetical order. You can use the standard **list controls** to search for specific attributes, and to sort the list. The Search and Reset Filter controls control the display of the list, but have no effect on the selection of attributes to be included in the export file.



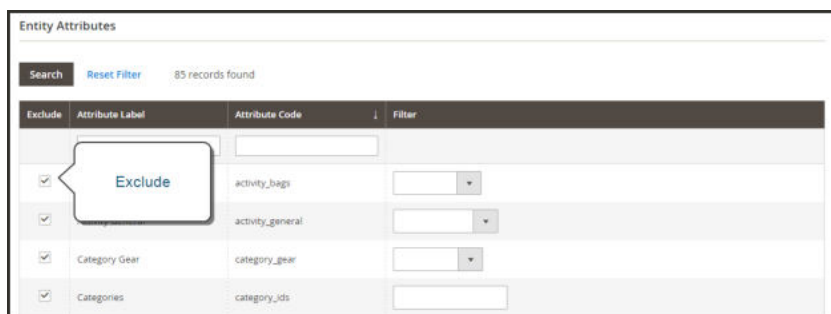
*Filtered Entity Attributes*

4. To filter the exported data based on attribute value, do the following:
  - To export only records with specific attribute values, enter the required value in the **Filter** column. The following example exports only a specific SKU.



*Export Product Based on SKU*

- To omit an attribute from the export, mark the **Exclude** checkbox at the beginning of the row. For example, to export only the sku and image columns, select the checkbox of every other attribute. The column appears in the export file, but without any values.



*Exclude Attributes*

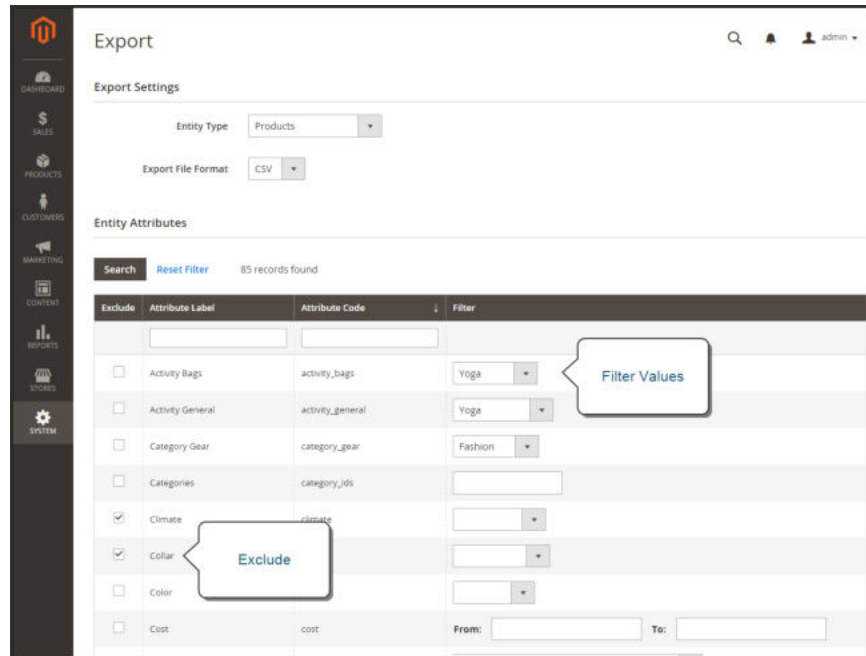
5. Scroll down and tap **Continue** in the lower-right corner of the page.

Look for the download prompt in the lower-right corner of your browser. The exported CSV file can be saved or opened in a spreadsheet. You can edit the data and import it back into your store.



# Export Criteria


Export filters are used to specify the data that you want to in the export file, based on attribute value. In addition, you can specify which attribute data you want to include or exclude from the export.



*Export Criteria*

## Export Filters

You can use filters to determine which SKUs are included in the export file. For example, if you enter a value in the Country of Manufacture filter, the exported CSV file will include only products manufactured in that country.

The type of filter corresponds to the data type. For date fields, you can choose the date from the Calendar . To learn more, see: [Attribute Input Types](#). The format of the date is determined by the [locale](#).

To include only records with a specific value, such as a sku, type the value into the Filter field. Some fields such as Price, Weight, and Set Product as New have a from/to range of values.

## Exclude Attributes

The checkbox in the first column is used to exclude attributes from the export file. If an attribute is excluded, the associated column in the export data is included, but empty.

### Export Criteria

EXCLUDE	FILTER	RESULT
<input type="checkbox"/>	No	The exported file contains each attribute for all existing records.
<input type="checkbox"/>	Yes	The export file contains each attribute with only the records allowed by the filter.
<input checked="" type="checkbox"/>	No	The export file does not include the column for the excluded attribute, but does include all existing records.
<input checked="" type="checkbox"/>	Yes	The export file does not include the column for the excluded attribute, and contains only the records allowed by the filter.

## Data Transfer Examples

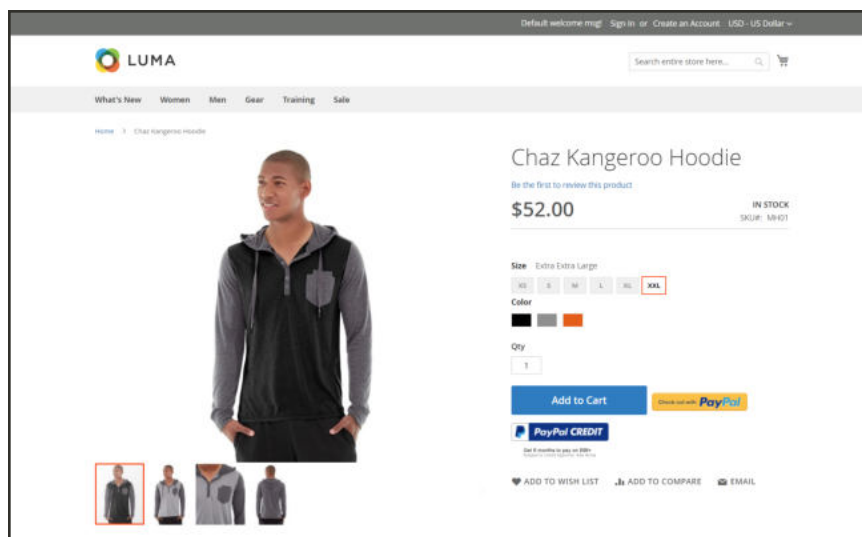
This section of the guide contains examples that show how to import and export catalog data for specific product types and scenarios.

- Configurable Products
- Tier Prices

### Importing Configurable Products

The best way to understand how configurable product data is structured, is to export a configurable product and its variations, and examine the data in a spreadsheet.

In the following example, you will add a set of product variations for a new size in each color. First, you will export the configurable product, and examine the data structure. Then, you will update the data and import it back into the catalog. If you don't want to go through the exercise of exporting the data, you can download the CSV file that is used in the example.



*New Size Variation Added for Each Color*

#### Step 1: Verify Attribute Settings and Values

1. Before you begin, make sure that the attributes that are used for product variations have the required property settings.

Scope

Global

Catalog Input Type for Store Owner

The input type of any attribute that is used for a product variation must be one of the following:

Dropdown  
 Visual Swatch  
 Text Swatch  
 Multi-Select.

Values Required      Yes

2. If you are adding a new size or color, or making any other change to an existing attribute, make sure to update the attribute with the new value.
  - a. On the Admin sidebar choose **Stores**. Then under **Attributes**, choose **Product**.
  - b. Find the attribute in the list, and open in edit mode.
  - c. Add the new value to the attribute. In the following example, a new size is added to a Text Swatch.



*Add New Value*

3. When complete, tap **Save Attribute**.
4. If you are adding a new attribute, follow the instructions to **create the attribute** before you begin.

## Step 2: Export the Configurable Product

1. On the Admin sidebar, choose **Catalog**. Then, tap **Products**, and do the following:
  - a. Tap **Filters**. Then, set **Type** to “Configurable Product, and tap **Apply Filters**.
  - b. Choose the configurable product that you want to use for your test export, and take note of the **SKU**.
2. On the Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Export**.
3. Under **Export Settings**, do the following:
  - a. Set **Entity Type** to “Products”.
  - b. Set **Export File Format** to “CSV”.



*Export Settings*

4. Under **Entity Attributes**, scroll down to **SKU**. Then, do the following:
  - a. Enter the **SKU** of the configurable product that you have chosen to export, and tap **Continue**.



*SKU*

- b. When the export file appears at the bottom of the window, click **Open**.

When opened in a spreadsheet, the CSV file has a separate row for each simple product variation, and one row for the configurable product. The `product_type` column shows multiple simple product variations that are associated with one configurable product.

#	A	B	C	D	E	F	G
1	sku	store_view_code	attribute_set_code	product_type	categories	product_webches	name
2	MH01-XS-Black	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-XS-Black	
3	MH01-XS-Gray	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-XS-Gray	
4	MH01-XS-Orange	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-XS-Orange	
5	MH01-S-Black	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-S-Black	
6	MH01-S-Gray	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-S-Gray	
7	MH01-S-Orange	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-S-Orange	
8	MH01-M-Black	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-M-Black	
9	MH01-M-Gray	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-M-Gray	
10	MH01-M-Orange	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-M-Orange	
11	MH01-L-Black	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-L-Black	
12	MH01-L-Gray	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-L-Gray	
13	MH01-L-Orange	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-L-Orange	
14	MH01-XL-Black	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-XL-Black	
15	MH01-XL-Gray	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-XL-Gray	
16	MH01-XL-Orange	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie-XL-Orange	
17	MH01	Top	configurable	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chai Kangaroo Hoodie	

*Configurable Product with Variations*

- c. Scroll to the far right of the worksheet to find the following columns. In this example, the data can be found in columns CG and CH.

`configurable_variations`

Defines the one-to-many relationship between the configurable product record and each variation.

`configurable_variation_labels`

Defines the label that identifies each variation.

Depending on the number of variations, the string of data in the `configurable_variations` column can be quite long. The data is used as an index to the associated product variations, and has the following structure:

**Data Format**

```
sku={{SKU_VALUE}},attribute1={{VALUE}},attribute2={{VALUE}}| sku={{SKU_VALUE}},attribute1={{VALUE}},attribute2={{VALUE}}
```

Each sku is separated by a pipe symbol (|), and attributes are separated by a comma. The value of each attribute is represented by the attribute code, rather than the attribute label. Here’s how the actual data appears:

**Example Data**

```
sku=MH01-XS-Black,size=XS,color=Black|sku=MH01-XS-Gray,size=XS,color=Gray|sku=MH01-XS-Orange,size=XS,color=Orange
```

- When you understand the structure of configurable product data, you can edit the data, or add new variations directly to the CSV file. To learn more, see: [Complex Data](#).

**Step 3: Edit the Data**

In the following example, the set of XL sizes is copied and pasted into the worksheet to create a new set of product variations for a new size in each color.

- Copy the set of product variations that you want to use as a template for the new products.

A	B	C	D	E	F	G
sku	store_view_code	attribute_product_type	categories			product_name
MH01-XS-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XS-Black	
MH01-XS-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XS-Gray	
MH01-XS-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XS-Orange	
MH01-S-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-S-Black	
MH01-S-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-S-Gray	
MH01-S-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-S-Orange	
MH01-M-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-M-Black	
MH01-M-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-M-Gray	
MH01-M-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-M-Orange	
MH01-L-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-L-Black	
MH01-L-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-L-Gray	
MH01-L-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-L-Orange	
MH01-XL-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XL-Black	
MH01-XL-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XL-Gray	
MH01-XL-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XL-Orange	
MH01	Top	configurable	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie	

*Copy Product Variations*

- Insert the copied rows records into the worksheet. You now have two identical sets of the simple product variations.

A	B	C	D	E	F	G
sku	store_view_code	attribute_product_type	categories			product_name
MH01-XS-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XS-Black	
MH01-XS-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XS-Gray	
MH01-XS-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XS-Orange	
MH01-S-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-S-Black	
MH01-S-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-S-Gray	
MH01-S-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-S-Orange	
MH01-M-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-M-Black	
MH01-M-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-M-Gray	
MH01-M-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-M-Orange	
MH01-L-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-L-Black	
MH01-L-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-L-Gray	
MH01-L-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-L-Orange	
MH01-XL-Black	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XL-Black	
MH01-XL-Gray	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XL-Gray	
MH01-XL-Orange	Top	simple	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie-XL-Orange	
MH01	Top	configurable	Default Category/Men/Top/Hoodies & Sweatshirts/Default Category/Collections/Eco Friendly/Default Category	base	Chat Kangaroo Hoodie	

*Paste New Product Variations into CSV File*

- Update the data in the following columns of the new variations, as needed. For this example, all the “XL” references are changed to “XXL”.

- sku
  - name
  - url\_key
  - additional\_attributes
4. The next step is to update the information in the `product_variations` column of the configurable product record, so the new variations are included as part of the configurable product.
    - a. On the row with the configurable product record, click the cell that contains the `product_variations` data. Then in the formula bar, copy the last set of parameters, beginning with the pipe symbol.



*product\_variations*

- b. Paste the parameters to the end of the data. Then, edit as needed for the new variations. In this example, the `sku` and `size` parameters are updated for the new “XXL” size.
5. Before the data is imported back into the catalog, delete any rows that have not changed.

In this example, only the three new variations for the new size, and the row with the updated configurable product are imported back into the catalog. The other rows can be deleted from the CSV file. However, make sure not to delete the header row with column labels.

	A	B	C	D	E	F	G
1	sku	store_view_code	attribute_id	product_type	categories	product_u_name	
2	MH03-XXL-Black	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts/Default Category/Collections/Eco-Friendly/Default Category	base	Chai Kangaroo Hoodie-XXL-Black	
3	MH03-XXL-Gray	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts/Default Category/Collections/Eco-Friendly/Default Category	base	Chai Kangaroo Hoodie-XXL-Gray	
4	MH03-XXL-Orange	Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts/Default Category/Collections/Eco-Friendly/Default Category	base	Chai Kangaroo Hoodie-XXL-Orange	
5	MH03	Top	configurable	Default Category/Men/Tops/Hoodies & Sweatshirts/Default Category/Collections/Eco-Friendly/Default Category	base	Chai Kangaroo Hoodie	

*Data Ready to Import*

6. **Save** the CSV file. The data is ready to import into the catalog.

The size of an import file cannot be larger than 2 megabytes.

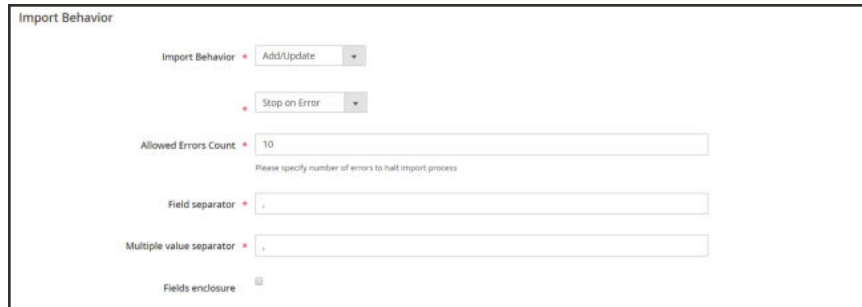
### Step 4: Import the Updated Data

1. On the Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Import**.
2. Under **Import Settings**, set **Entity Type** to “Products”.



*Import Settings*

- 3. Under **Import Behavior**, set **Import Behavior** to “Add/Update”.



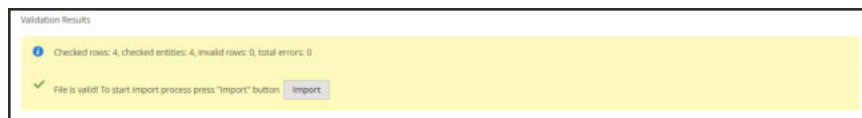
*Import Behavior*

- 4. Under **File to Import**, tap **Choose File**. Then, navigate to the CSV file that you prepared for import and choose the file.



*File to Import*

- 5. In the upper-right corner tap **Check Data**.
- 6. If the file is valid, tap **Import**. Otherwise, correct any problems found in the data and try again.



*Validation Results*

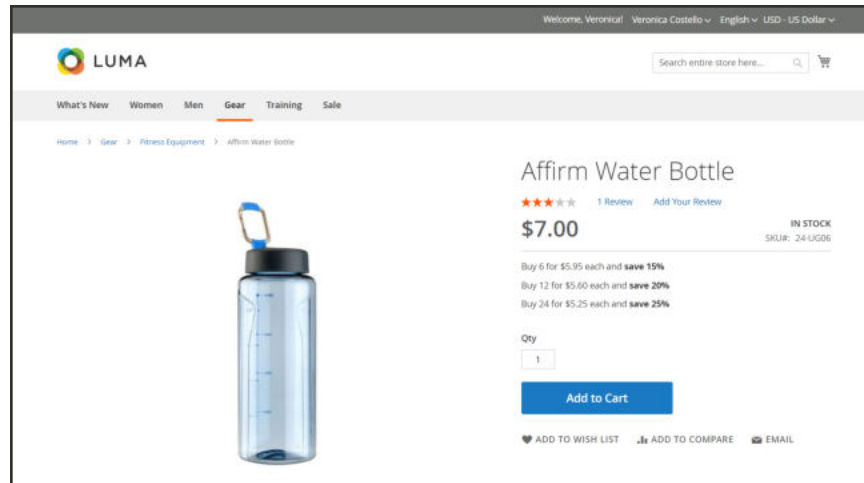
- 7. When the import is complete, click the **Cache Management** link in the message at the top of the page. Then, refresh all invalid caches.

The new product variations are now available in the catalog from the Admin and in the storefront. In this example, the hoodie is now available in size XXL for all colors.



## Importing Tier Prices

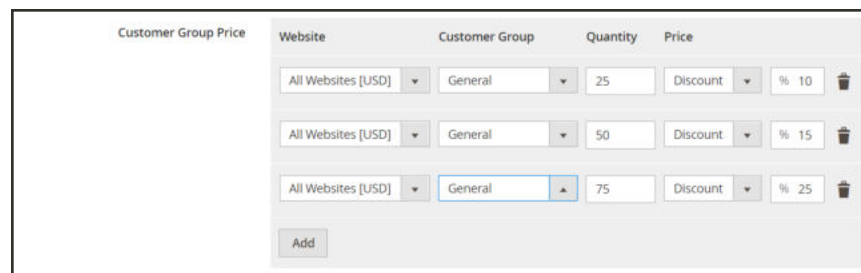
Rather than entering **tier prices** manually for each product, it can be more efficient to **import** the pricing data. Before you begin, create a sample file of exported tier price data that you can use as a template.



*Tier Pricing*

### Step 1: Export the Tier Price Data

The following example exports tier pricing data for a single product. Then, you can use the exported data as a template for bulk imports of tier price data. To learn more about exporting advanced pricing data, see: [Advanced Pricing Data](#).



*Tier Pricing*

1. On Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Export**.
2. Under **Export Settings**, set **Entity Type** to “Advanced Pricing.”
3. In the **Entity Attributes** grid, scroll down to the SKU attributes. Then, do the following:

- a. For tier prices that are based on a discount percentage. enter the SKU of each product to be exported, separated by a comma.

<input type="checkbox"/>	Size	size	<input type="text"/>
<input type="checkbox"/>	SKU	sku	<input type="text" value="24-UG06"/>
<input type="checkbox"/>	Dynamic SKU	sku_type	From: <input type="text"/> To: <input type="text"/>

*SKU(s) to Export*

- a. For tier prices that are based on a fixed amount. enter the SKU of each product.
- 4. Scroll down and tap **Continue**.
- 5. Look in the lower-left corner of your browser window for the export file. Then, open the file.

	A	B	C	D	E	F
1	sku	tier_price_website	tier_price_customer_group	tier_price_qty	tier_price	tier_price_value_type
2	24-UG03	All Websites [USD]	General	25	2.2	Fixed
3	24-UG03	All Websites [USD]	General	50	3.3	Fixed
4	24-UG03	All Websites [USD]	General	75	5.5	Fixed
5						

*Exported Tier Price Data*

The following columns are included in the exported data:

- sku
- tier\_price\_website
- tier\_price\_customer\_group
- tier\_price\_qty
- tier\_price
- tier\_price\_value\_type

You will use the exported data as a template for importing tier price data.

### Step 2: Update the Data

1. Update the tier price data for each product, as needed.
2. Any products without tier price updates can be deleted from the CSV file. There is no need to reimport products that haven't changed.
3. **Save** the updated CSV file.

The size of an import file cannot be larger than 2 megabytes.

### Step 3: Import the Updated Data

1. On Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Import**.
2. Under **Import Settings**, set **Entity Type** to “Advanced Pricing.” Then, set **Import Behavior** to “Add/Update”.
3. Under **File to Import**, tap **Choose File**. Then, select the file that you prepared to import from your directory.
4. In the upper-right corner, tap **Check Data**.
5. If the file is valid, tap **Import**. Otherwise, correct each problem with the data that is listed in the message, and try to import the file again.

## Product Attribute Reference

The following table lists the attributes from a typical product export, in the default order in which they appear. Each attribute is represented in the CSV file as a column, and product records are represented by rows. Columns that begin with an underscore contain service data such as properties or option values for complex data. You can **export** a product from your catalog, to see how each attribute is represented in the data.

The installation used to export this data has the sample data installed, and has two websites and several store views. Although this list includes all columns that are typically exported, the sku is the only required value. To import data, you can include only the columns with changes. The sku should be the first column, but the order of the rest of the attributes doesn't matter.

### Simple Product CSV File Structure

ATTRIBUTE	DESCRIPTION				
sku	<p>(Required) The Stock-Keeping Unit is a unique, alphanumeric identifier that is used to track inventory. A SKU can be up to 64 characters in length. For example: sku123</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>A SKU longer than 64 characters will cause import to fail.</p> </div>				
store_view_code	<p>Identifies the specific store view(s) where the product is available. If blank, the product is available at the default store view. For example: storeview1,english,spanish</p>				
attribute_set_code	<p>Assigns the product to a specific attribute set or product template, according to product type. Once the product is created, the attribute set cannot be changed. For example: default</p>				
product_type	<p>Indicates the type of product. Values:</p> <table border="0" style="width: 100%;"> <tr> <td style="padding-right: 20px;">simple</td> <td>Tangible items that are generally sold as single units or in fixed quantities.</td> </tr> <tr> <td>grouped</td> <td>A group of separate products that is sold as a set.</td> </tr> </table>	simple	Tangible items that are generally sold as single units or in fixed quantities.	grouped	A group of separate products that is sold as a set.
simple	Tangible items that are generally sold as single units or in fixed quantities.				
grouped	A group of separate products that is sold as a set.				

## Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p><code>configurable</code> A product with multiple options that the customer must select before making a purchase. Inventory can be managed for each set of variations because they represent a separate product with a distinct SKU. For example, a combination of color and size for a configurable product is associated with a specific SKU in the catalog.</p> <p><code>virtual</code> A non-tangible product that does not require shipping and is not kept in inventory. Examples include services, memberships, and subscriptions.</p> <p><code>bundle</code> A customizable product set of simple products that are sold together.</p>
<code>categories</code>	<p>Indicates each category that is assigned to the product. Separate categories and subcategories with a forward slash. To indicate multiple category paths, separate each path with a pipe “ ” symbol. For example:</p> <p>Default Category/Gear Default Category/Gear/Bags</p>
<code>product_websites</code>	<p>The <b>website code</b> of each website where the product is available. A single product can be assigned to multiple websites, or limited to one. If specifying multiple websites, separate each with a comma and without a space. For example:</p> <p><code>base</code> <code>base,website2</code></p>
<code>name</code>	<p>The product name appears in all product listings, and is the name that customers use to identify the product.</p>
<code>description</code>	<p>The product description provides detailed information about the product, and might include simple HTML tags.</p>

### Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION								
short_description	The use of the short product description depends on the theme. It might appear in product listings and is sometimes used in RSS feed listings sent to shopping sites.								
weight	The weight of the individual product. The actual product weight is determined by the carrier at the time of shipment.								
product_online	Determines if the product is available for sale in the store. Values: <table border="0" style="margin-left: 20px;"> <tr> <td style="padding-right: 20px;">1</td> <td>(Yes) The product is enabled, and available for sale.</td> </tr> <tr> <td>2</td> <td>(No) The product is disabled, and is not available for sale.</td> </tr> </table>	1	(Yes) The product is enabled, and available for sale.	2	(No) The product is disabled, and is not available for sale.				
1	(Yes) The product is enabled, and available for sale.								
2	(No) The product is disabled, and is not available for sale.								
tax_class_name	The name of the tax class that is associated with this product.								
visibility	Determines if the product is visible in the catalog, and made available for search. Values: <table border="0" style="margin-left: 20px;"> <tr> <td style="padding-right: 20px;">Not Visible Individually</td> <td>The product is not included in product listings, although it might be available as a variation of another product.</td> </tr> <tr> <td>Catalog</td> <td>The product appears in all catalog listings.</td> </tr> <tr> <td>Search</td> <td>The product is available for search operations.</td> </tr> <tr> <td>Catalog, Search</td> <td>The product is included in catalog listings and is also available for search.</td> </tr> </table>	Not Visible Individually	The product is not included in product listings, although it might be available as a variation of another product.	Catalog	The product appears in all catalog listings.	Search	The product is available for search operations.	Catalog, Search	The product is included in catalog listings and is also available for search.
Not Visible Individually	The product is not included in product listings, although it might be available as a variation of another product.								
Catalog	The product appears in all catalog listings.								
Search	The product is available for search operations.								
Catalog, Search	The product is included in catalog listings and is also available for search.								
price	The price that the product is offered for sale in your store.								
special_price	The discounted price of the product during the specified date range.								
special_price_from_date	The beginning date of the time period when the special price is in effect.								

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
special_price_to_date	The last date of the time period when the special price is in effect.
url_key	The part of the URL that identifies the product. The default value is based on the product name. For example: product-name
meta_title	The meta title appears in the title bar and tab of the browser and search results lists. The meta title should be unique to the product, incorporate high-value keywords, and be less than 70 characters in length.
meta_keywords	Meta keywords are visible only to search engines, and are ignored by some search engines. Choose high-value keywords, separated by a comma. For example: keyword1,keyword2,keyword3.
meta_description	Meta descriptions provide a brief overview of the product for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field accepts up to 255 characters.
base_image	The relative path for the main image on the product page. Magento stores files internally in an alphabetical folder structure. You can see the exact location of each image in the exported data. For example: /sample_data/m/b/mb01-blue-0.jpg To upload a new image or write over an existing image, enter the file name, preceded by a forward slash. For example: /image.jpg
base_image_label	The label that is associated with the base image.
small_image	The file name of the small image that is used on catalog pages, preceded by a forward slash. For example: /image.jpg
small_image_label	The label associated with the small image. For example: Small Image 1, Small Image 2
thumbnail_image	The file names of any thumbnail image to appear in the gallery on the product page, preceded by a forward slash. For example: /image.jpg

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
thumbnail_image_label	The label associated with any thumbnail images. For example: Thumbnail 1, Thumbnail 2
created_at	Indicates the date when the product was created. The date is automatically generated when the product is created, but can be edited later.
updated_at	Indicates the date when the product was last updated.
new_from_date	Specifies the “from” date for new product listings, and determines if the product is featured as a new product.
new_to_date	Specifies the “to” date for new product listings, and determines if the product is featured as a new product.
display_product_options_in	If the product has multiple options, determines where they appear on the product page. Values: Product Info Column Block after Info Column
map_price	The minimum advertised price of the product. (Appears only if MAP is enabled.)
msrp_price	The manufacturer’s suggested retail price for the product. (Appears only if MAP is enabled.)
map_enabled	Determines if Minimum Advertised Price is enabled in the configuration. Values:  1           (Yes) MAP is enabled.  0 (or blank)   (No) MAP is not enabled.
gift_message_available	Determines if a gift message can be included with the product purchase. Values:  1           (Yes) The option to include a gift message is presented to the customer.  0 (or blank)   (No) The option to include a gift message is not presented to the customer.
custom_design	Lists the available themes that can be applied to the product page.



**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION												
custom_design_from	Specifies the beginning date when the selected theme is applied to the product page.												
custom_design_to	Specifies the end date when the selected theme is applied to the product page.												
custom_layout_update	Additional XML code that is applied as a layout update to the product page.												
page_layout	Determines the page layout of the product page. Values: <table border="0"> <tr> <td>No layout updates</td> <td>No change is made to the page layout.</td> </tr> <tr> <td>1 column</td> <td>Applies a one- column layout to the product page.</td> </tr> <tr> <td>2 columns with left bar</td> <td>Applies a two-column layout with a left sidebar to the product page.</td> </tr> <tr> <td>2 columns with right bar</td> <td>Applies a two-column layout with a right sidebar to the product page.</td> </tr> <tr> <td>3 columns</td> <td>Applies a three-column layout to the product page.</td> </tr> <tr> <td>empty</td> <td>Applies a blank layout to the product page.</td> </tr> </table>	No layout updates	No change is made to the page layout.	1 column	Applies a one- column layout to the product page.	2 columns with left bar	Applies a two-column layout with a left sidebar to the product page.	2 columns with right bar	Applies a two-column layout with a right sidebar to the product page.	3 columns	Applies a three-column layout to the product page.	empty	Applies a blank layout to the product page.
No layout updates	No change is made to the page layout.												
1 column	Applies a one- column layout to the product page.												
2 columns with left bar	Applies a two-column layout with a left sidebar to the product page.												
2 columns with right bar	Applies a two-column layout with a right sidebar to the product page.												
3 columns	Applies a three-column layout to the product page.												
empty	Applies a blank layout to the product page.												
product_options_container	If the product has multiple options, determines where they appear on the product page. Values: Product Info Column Block after Info Column												
msrp_display_actual_price_type	Determines where the actual price of a product is visible to the customer. Values:												

## Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p>In Cart                      Displays the actual product price in the shopping cart.</p> <p>Before Order Confirmation      Displays the actual product price at the end of the checkout process, just before the order is confirmed.</p> <p>On Gesture                      Displays the actual product price in a popup when the customer clicks the “Click for price” or “What’s this?” link.</p>
country_of_manufacture	Identifies the country where the product was manufactured.
additional_attributes	<p>Additional attributes created for the product. For example:</p> <p>has_options=0,required_options=0</p> <p>color=Black,has_options=0,required_options=0,size_general=XS</p>
qty	The quantity of the product that is currently in stock.
out_of_stock_qty	The stock level that determines the product to be out of stock.
use_config_min_qty	<p>Determines if the default value from the configuration is used, and corresponds to the Use Config Settings checkbox. Values:</p> <p>1                      (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank)      (No) The default configuration can be overridden for the value of this attribute.</p>
is_qty_decimal	<p>Determines if the qty attribute has a decimal value. Values:</p> <p>1                      (Yes) The value of the qty attribute is a decimal value.</p> <p>0 (or blank)      (No) The value of the qty attribute is a whole number (integer).</p>

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION				
allow_backorders	Determines if your store allows backorders, and how they are managed.				
use_config_backorders	Determines if the default configuration setting for backorders is used, and corresponds to the state of the Use Config Settings checkbox. Values: <table border="0"> <tr> <td>1</td> <td>(Yes) The default configuration setting is used for the value of this attribute.</td> </tr> <tr> <td>0 (or blank)</td> <td>(No) The default configuration can be overridden for the value of this attribute.</td> </tr> </table>	1	(Yes) The default configuration setting is used for the value of this attribute.	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
1	(Yes) The default configuration setting is used for the value of this attribute.				
0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.				
min_cart_qty	Specifies the minimum quantity of the item that can be purchased in a single order.				
use_config_min_sale_qty	Determines if the default configuration setting for minimum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values: <table border="0"> <tr> <td>1</td> <td>(Yes) The default configuration setting is used for the value of this attribute.</td> </tr> <tr> <td>0 (or blank)</td> <td>(No) The default configuration can be overridden for the value of this attribute.</td> </tr> </table>	1	(Yes) The default configuration setting is used for the value of this attribute.	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
1	(Yes) The default configuration setting is used for the value of this attribute.				
0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.				
max_cart_qty	Specifies the maximum quantity of the product that can be purchased in a single order.				
use_config_max_sale_qty	Determines if the default configuration setting for maximum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values: <table border="0"> <tr> <td>1</td> <td>(Yes) The default configuration setting is used for the value of this attribute.</td> </tr> <tr> <td>0 (or blank)</td> <td>(No) The default configuration can be overridden for the value of this attribute.</td> </tr> </table>	1	(Yes) The default configuration setting is used for the value of this attribute.	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
1	(Yes) The default configuration setting is used for the value of this attribute.				
0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.				
is_in_stock	Indicates if the product is in stock.				
notify_on_stock_below	Specifies the stock level that triggers an “out of stock” notification.				
use_config_notify_stock_qty	Determines if the default configuration setting is used to trigger stock level notification, and corresponds to the state of the Use Config Settings checkbox. Values:				

## Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
manage_stock	<p>Determines if inventory control is used to manage the product. Values:</p> <p>1 (Yes) Activates full inventory control to manage stock levels of the product.</p> <p>0 (or blank) (No) The system does not keep track of the number of items that are currently in stock.</p>
use_config_manage_stock	<p>Determines if the default configuration setting for managing stock is used, and corresponds to the state of the Use Config Settings checkbox. Values:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
use_config_qty_increments	<p>Determines if the default configuration setting for quantity increments is used, and corresponds to the state of the Use Config Settings checkbox.. Values:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
qty_increments	<p>Determines if the product is sold in quantity increments. Options: Yes / No</p>
use_config_enable_qty_inc	<p>Determines if the default configuration setting to enable quantity increments is used, and corresponds to the state of the Use Config Settings checkbox. Values:</p>

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
	1 (Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank) (No) The default configuration can be overridden for the value of this attribute.
enable_qty_increments	Determines if quantity increments are enabled for the product.
is_decimal_divided	Determines if parts of the product can be shipped separately. Options: Yes / No
website_id	For installations with multiple websites, identifies a specific website where the product is available. If blank, the product is available in all websites.
related_skus	Lists the sku of each product that has been identified as a <b>Related Product</b> . For example: 24-WG080,24-UG03,24-UG01,24-UG02
crosssell_skus	Lists the sku of each product that has been identified as a <b>Cross-sell</b> .
upsell_skus	Lists the sku of each product that has been identified as an <b>Upsell</b> .
additional_images	The file names of any additional image to be associated with the product, preceded by a forward slash. For example: /image.jpg
additional_image_labels	The labels associated with any additional images. For example: Label 1, Label 2
custom_options	Specifies the properties and values assigned to each custom option. For example: name=Color,type=drop_down,required=1,price= price_type=fixed, sku=,option_title=Black name=Color,type=drop_down,required=1,price=, price_type=fixed,sku=,option_title=White

**SERVICE DATA FOR PRODUCT VARIATIONS**

**Simple Product CSV File Structure (cont.)**

ATTRIBUTE	DESCRIPTION
<code>_super_products_sku</code>	The generated SKU for a configurable product variation. For example: WB03-XS-Green Applies to: Configurable Products
<code>_super_attribute_code</code>	The attribute code of a configurable product variation. For example: color Applies to: Configurable Products
<code>_super_attribute_option</code>	The value of a configurable product variation. For example: green Applies to: Configurable Products
<code>_super_attribute_price_corr</code>	A price adjustment that is associated with a configurable product variation. Applies to: Configurable Products
<code>_associated_sku</code>	The SKU of a product that is associated with a grouped product. Applies to: Grouped Products Bundle Products
<code>_associated_default_qty</code>	Determines the quantity of the associated product that is included. Applies to: Configurable Products Grouped Products Bundle Products
<code>_associated_position</code>	Determines the position of the associated product when listed with other associated products. Applies to: Configurable Products Grouped Products Bundle Products

## Complex Data

The term **complex data**<sup>1</sup> refers to the data that is associated with multiple product options. The following product types use data that originates from separate products to create product variations and multiple options.

- **Configurable**
- **Grouped**
- **Bundle**

If you were to export a configurable product, you would find the standard attributes that make up a simple product, plus the additional attributes that are needed to manage complex data.

sku	store_view_code	attribute_set_code	product_type	categories
WT08-XS-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-XL-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-XL-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-XL-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-L-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-L-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-L-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-M-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-M-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-M-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-S-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-S-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-S-Black		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-XS-Yellow		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08-XS-Purple		Top	simple	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk
WT08		Top	configurable	Default/Collections/Default/Women/Default/Women/Tops/Default/Women/Tops/Blas & Tanks/Default/Promotions/Default/Promotions/Women_Sale/Default/Collections/Perk

*Exported Configurable Product Data*

<sup>1</sup>Data that is associated with multiple product options.

**Complex Data Attributes**

ATTRIBUTE	DESCRIPTION
<b>CONFIGURABLE PRODUCTS</b>	
configurable_variation_labels	Labels that identify product variations. For example: Choose Color: Choose Size:
configurable_variations	Describes the values associated with a product variation. For example: sku=sku-red xs,color=red,size=xs,price=10.99, display=1, image=/pub/media/import/image1.png sku=sku-red-m, color=red,size=m,price=20.88,display=1, image=/pub/media/import/image2.png
<b>GROUPED PRODUCTS</b>	
associated_skus	Identifies the SKUs of the individual products that make up the group.
<b>BUNDLE PRODUCTS</b>	
bundle_price_type	Determines if the price of a bundle item is fixed or dynamic.
bundle_sku_type	Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.
bundle_weight_type	Determines if the weight of a bundle item is variable or fixed.
bundle_values	Describes each value associated with a bundle option. For example: name=Bundle Option One,type=dropdown; required=1, sku=sku-option2,price=10, price_type=fixed



## Advanced Pricing Data

Advanced Price Import/Export allows you to quickly update pricing information for product groups and tier prices. The process to **import** and **export** advanced price data is the same as any other entity type. The sample CSV file contains tier and group prices for each product type that supports advanced pricing. Making changes to advanced pricing does not affect the rest of the product record.

1	sku	tier_price_website	tier_price_customer_group	tier_price_qty	tier_price_group_price_website	group_price_customer_group	group_price_price
2	sku123	website1	General	2	10		
3	sku124	All Websites [USD]	ALL GROUPS	3	15		
4	sku123				website1	General	11
5	sku124				All Websites [USD]	General	12

Advanced Price Sample File

### Advanced Pricing Attributes

ATTRIBUTE	DESCRIPTION
sku	<p>(Required) The Stock-Keeping Unit is a unique, alphanumeric identifier that is used to track inventory. A SKU can be up to 64 characters in length. For example: sku123</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">                     A SKU longer than 64 characters will cause import to fail.                 </div>
tier_price_website	<p>The <b>website code</b> identifies each website where tier pricing is available. For example:</p> <p>website1</p> <p>All Websites [USD]</p>
tier_price_customer	<p>Identifies the <b>customers groups</b> where tier pricing is available. For example:</p> <p>ALL GROUPS</p> <p>NOT LOGGED IN</p> <p>General</p> <p>Wholesale</p> <p>Retailer</p>
tier_price_customer_group	<p>Identifies the <b>customers groups</b> where tier pricing is available. For example:</p> <p>ALL GROUPS</p> <p>NOT LOGGED IN</p> <p>General</p> <p>Wholesale</p> <p>Retailer</p>

**Advanced Pricing Attributes (cont.)**

ATTRIBUTE	DESCRIPTION
tier_price_qty	The quantity of the product that must be ordered to receive the tier price discount.
tier_price	The discounted tier price of the product. For <b>bundle</b> products, tier price is calculated as a percentage.
group_price_website	The <b>website code</b> of each website where group pricing is available. If specifying multiple websites, separate each with a comma and without a space. For example: website1 All Websites [USD]
group_price_customer_group	Identifies the <b>customers groups</b> where group pricing is available. For example: NOT LOGGED IN General Wholesale Retailer
group_price	The discounted group price of the product. For <b>bundle</b> products, group price is calculated as a percentage.

## Customer Attribute Reference

The following tables list the attributes from a typical export of the Customers Main File and Customer Addresses. The installation that was used to export this data has two websites and several store views, with the sample data installed.

Each attribute, or field, is represented in the CSV file as a column, and customer records are represented by rows. Columns that begin with an underscore are service entities that contain properties or complex data.

### Customers Main File

ATTRIBUTE	DESCRIPTION
email	
_website	
_store	
confirmation	
created_at	
created_in	
disable_auto_group_change	
dob	
firstname	
gender	
group_id	
lastname	
middlename	
password_hash	
prefix	
rp_token	
rp_token_created_at	
store_id	
suffix	

**Customers Main File (cont.)**

ATTRIBUTE	DESCRIPTION
taxvat	
website_id	
password	

**Customer Addresses**

ATTRIBUTE	DESCRIPTION
_website	
_email	
_entity_id	
city	
company	
country_id	
fax	
firstname	
lastname	
middlename	
postcode	
prefix	
region	
region_id	
street	
suffix	
telephone	
vat_id	
vat_is_valid	
vat_request_date	
vat_request_id	

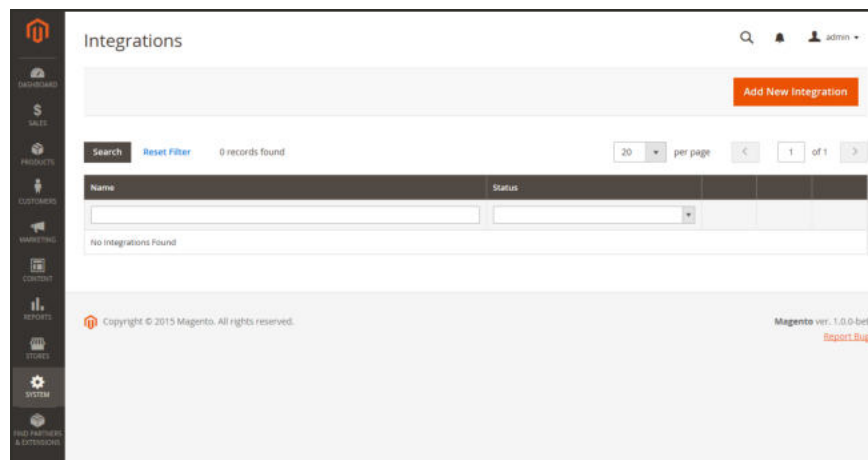
**Customer Addresses (cont.)**

ATTRIBUTE	DESCRIPTION
vat_request_success	
_address_default_billing_	Identifies the default billing address. A value of 1 indicates that the address is the default billing address of the customer. Values: 1 / 0
_address_default_shipping_	Identifies the default shipping address. A value of 1 indicates that the address is the default shipping address of the customer. Values: 1 / 0

## CHAPTER 89:

# Integrations

Establishes the location of OAuth credentials and redirect URL for third-party integrations, and identifies the available API resources that are needed for the integration.



*Integrations*

## Onboarding Workflow

- 1 Authorize the integration.** Go to the system/integration screen, find the relevant integration, and authorize.
- 2 Verify and establish login.** When prompted, accept the access requested. If redirected to a third-party, log in to the system, or create a new account. After a successful login, you return to the integration page.
- 3 Receive confirmation of authorized integration.** The system sends notification that the integration has been authorized successfully. After setting up an integration and receiving the credentials, it is no longer necessary to make calls to access or request tokens.

### To add a new integration:

1. On the Admin sidebar, tap **System**. Then under **Extensions**, choose **Integrations**.
2. Enter the following Integration Info:
  - a. Enter the **Name** of the integration, and the contact **Email** address.
  - b. Enter the **Callback URL** where OAuth credentials can be sent when using OAuth for token exchange. We strongly recommend using https://.
  - c. Enter the **Identity Link URL** to redirect the users to a third-party account with these Magento integration credentials.

*New Integration*

3. In the panel on the left, choose **API**. Then, do the following:
  - a. Set **Resource Access** to one of the following:
    - All
    - Custom
  - b. For custom access, mark the checkbox of each resource that is needed:





*Resources Needed for Custom Access*

4. When complete, tap **Save**.

**To change the API guest access security setting:**

By default, the system does not permit anonymous guest access to CMS, catalog, and other store resources. If you need to change the setting, do the following:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Services**, choose **Magento Web API**.
3. Expand the **Web API Security Setting** section.

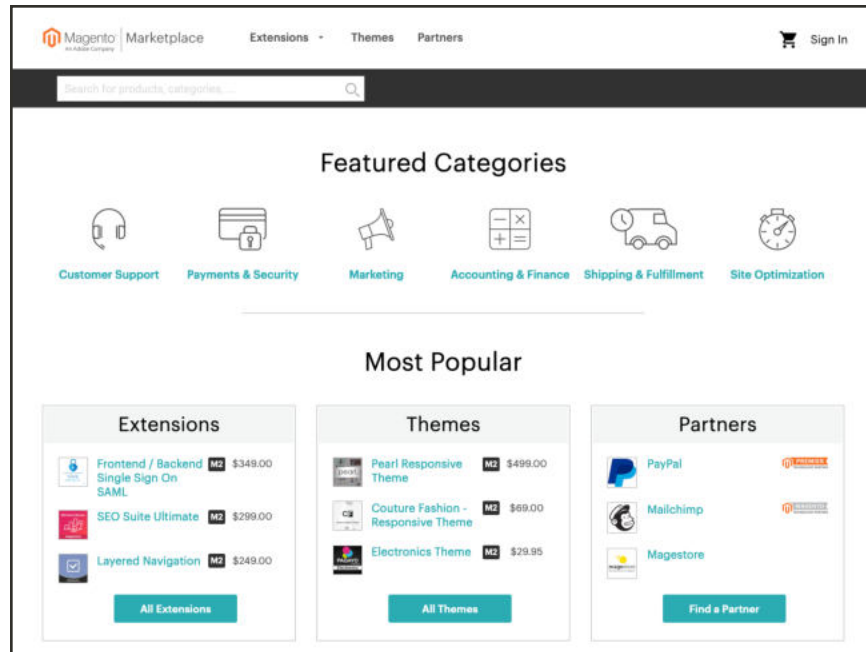
*Web API Security*

4. Set **Allow Anonymous Guest Access** to “Yes,”
5. When complete, tap **Save Config**.

To learn more, see: “[Restricting access to anonymous web APIs](#)” in the Magento developer documentation.

## Magento Marketplace

Magento Marketplace is our next generation application store that offers merchants a curated selection of solutions, and provides qualified developers the tools, platform, and prime location to build a thriving business.



*Magento Marketplace*

### To visit Magento Marketplace:

Go to [Magento Marketplace](#).

### To find Magento partners featured on Marketplace:

In the Admin sidebar, tap **Find Partners & Extensions**.

To learn more, see the [Magento Marketplace User Guide](#). For extension installation instructions, see [Extensions Manager](#) and [Module Manager](#) in this guide, or the [Marketplace Quick Tour](#).

### To install extensions:

Installing an extension is a three-step process that should take place during off-peak hours. Before the extension is installed, your store is put into maintenance mode, checked for readiness, and backed up. After the extension is installed, it must be configured for your store according to the developer's instructions.

For step-by-step installation instructions, see the [Marketplace User Guide](#).

## CHAPTER 90:

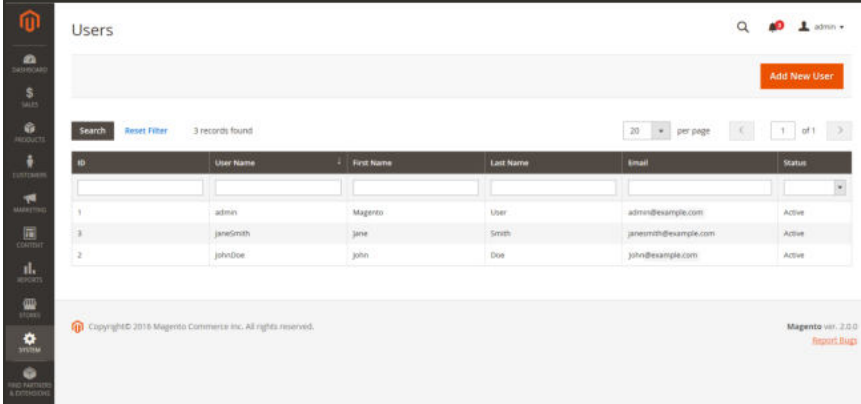
# Permissions

Magento uses roles and permissions to create different levels of access to the Admin. When your store is first set up, you receive a set of login credentials for the Administrator role that has full permissions. However, you can restrict the level of permissions on a “need to know” basis for other people who work on your site. For example, a designer can be given access to only the Design tools, but not to areas with customer and order information.

In addition, you can further restrict Admin access to only a specific site, or set of sites and their associated data. If you have multiple brands or business units with separate stores on the same Magento installation, you can provide Admin access to each of your business units but hide and protect their data from other Admin users.

If an Admin user’s access is restricted to specific websites or stores, the websites and stores for which they are not authorized will either not be visible to them or will be grayed-out as inactive. Only the sales and other data for permitted websites and stores is displayed for the user.

By default, the system automatically logs (records) all actions performed by a user when making a change to a store. Admin actions can be reviewed in the Action Logs Report. Configure logging in Admin Actions Logging in your store’s advanced admin settings.



The screenshot shows the 'Users' management interface in the Magento Admin. It features a search bar, a table with columns for ID, User Name, First Name, Last Name, Email, and Status, and an 'Add New User' button. The table contains three entries: 'admin', 'janeSmith', and 'johnDoe'. The footer includes copyright information and the Magento version (2.0.0).

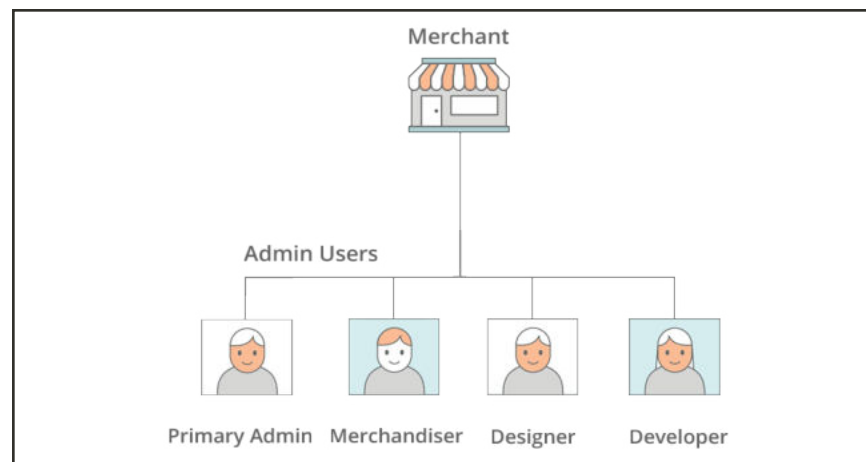
ID	User Name	First Name	Last Name	Email	Status
1	admin	Magento	User	admin@example.com	Active
3	janeSmith	jane	Smith	janeSmith@example.com	Active
2	johnDoe	john	Doe	john@example.com	Active

*All Users*

## Adding Users

When your store is first installed, a default Admin account is created with login credentials that give you full administrative access. As a best practice, one of the first things you should do is to create another user account with full Administrator access. That way, you can use one account for your everyday Administrative activities, and reserve the other as a “Super Admin” account in case you forget your regular credentials or they somehow become unusable.

If there are others on your team, or service providers who need access, you can create a separate user account for each, and assign restricted access based on their business need to know. To limit the websites or stores that admin users can access when they log in, you must first create a role with limited scope and access only to the necessary resources. Then, you can assign the role to a specific user account. Admin users who are assigned to a restricted role can see and change data only for websites or stores that are associated with the role. They cannot make changes to any global settings or data.



*Example Admin Users*

## Step 1: Create a New User

1. On the Admin sidebar tap **System**. Then under **Permissions**, choose **All Users**.
2. In the upper-right corner, tap **Add New User**.
3. In the Account Information section, do the following:

The screenshot shows the 'New User' form in the Magento Admin interface. The form is titled 'New User' and is located under the 'System' > 'Permissions' > 'All Users' path. It features a sidebar with navigation options: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, TOOLS, and SYSTEM. The main form area is divided into two sections: 'USER INFORMATION' and 'Account Information'. The 'USER INFORMATION' section includes 'User Info' and 'User Role'. The 'Account Information' section includes fields for 'User Name', 'First Name', 'Last Name', 'Email', 'Password', and 'Password Confirmation'. There is also a dropdown for 'Interface Locale' set to 'English (United States) / English (United States)' and a dropdown for 'This account is' set to 'Active'. At the top right of the form, there are buttons for 'Back', 'Reset', and 'Save User'.

*New User Account Information*

- a. Enter the **User Name** for account.

The User Name should be easy to remember. It is not case-sensitive. For example, if your user name is “John,” you can also log in as “john.”

- b. Complete the following information:

- First Name
- Last Name
- Email address

This email address must be different from the one that is associated with your original Admin account.

- c. Assign a **Password** to the account.

An Admin password must be seven or more characters long, and include both letters and numbers.

- d. In the **Password Confirmation** box, repeat the password to make sure it was entered correctly.
- e. If your store has multiple languages, set **Interface Locale** to the language to be used for the Admin interface.
4. Set **This Account is** to “Active.”
5. Under Current User Identity Verification, enter **Your Password**.

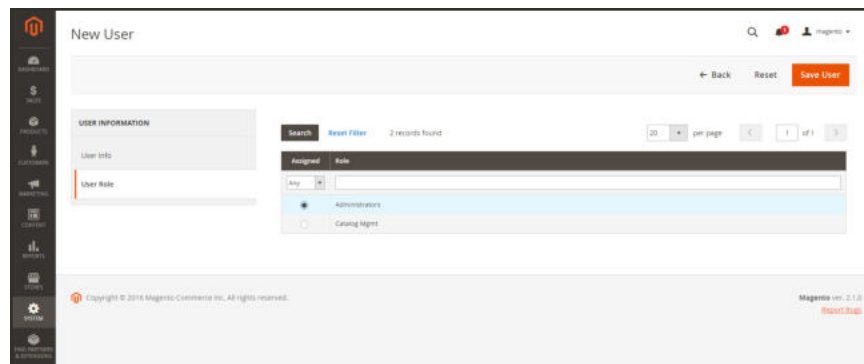
A screenshot of a web form titled "Current User Identity Verification". The form has a header bar with the title. Below the header, there is a label "Your Password" followed by a text input field. The input field is currently empty.

*Current User Identity Verification*

## Step 2: Define the Role

1. In the panel on the left, choose **User Role**. The grid lists all the existing roles. For a new store, Administrators is the only role available.
2. In the Assigned column, select the **Administrators** option.
3. Tap **Save User**.

You now have two accounts with Administrator access.



*Add New User Role*

## Admin Password Requirements

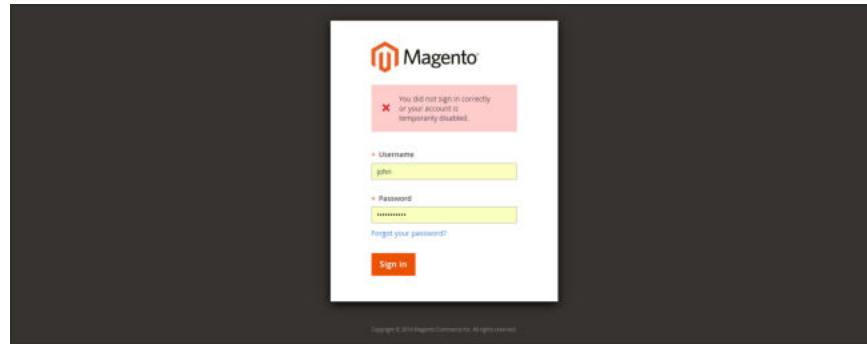
FIELD	DESCRIPTION
Password	An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: <a href="#">Configuring Admin Security</a> .



## Locked Users

For the security of your business, user accounts are locked by default after six failed attempts to **log in** to the Admin. Any user account that is currently locked appears in the Locked Users grid. An account can be unlocked by any other user with full Administrator permissions.

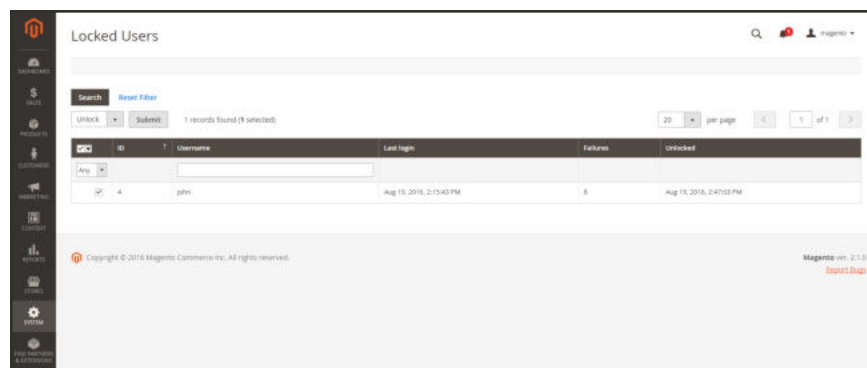
Additional password security measures can be implemented in the **Advanced Admin** configuration. To learn more, see: **Configuring Admin Security**.



*Admin Account Disabled*

### To unlock an admin account:

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **Locked Users**.
2. In the grid, mark the checkbox of the locked account.

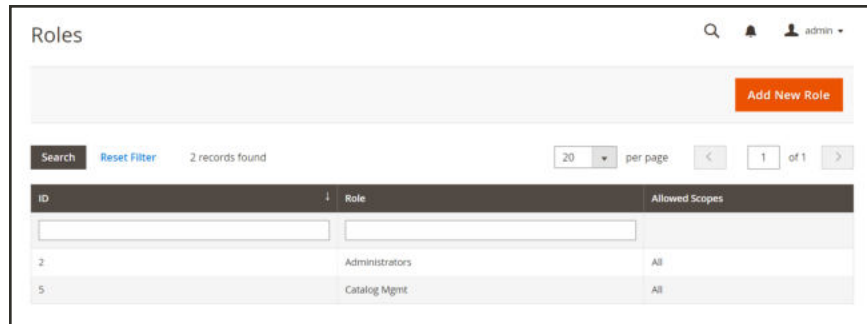


*Locked Users*

3. In the upper-left corner, set the **Actions** control to “Unlock.”
4. Tap **Submit** to unlock the account.

## User Roles

To give someone restricted access to the Admin, the first step is to create a role that has the appropriate level of permissions. After the role is saved, you can add new users and assign the restricted role to grant them limited access to the Admin.



ID	Role	Allowed Scopes
2	Administrators	All
5	Catalog Mgmt	All

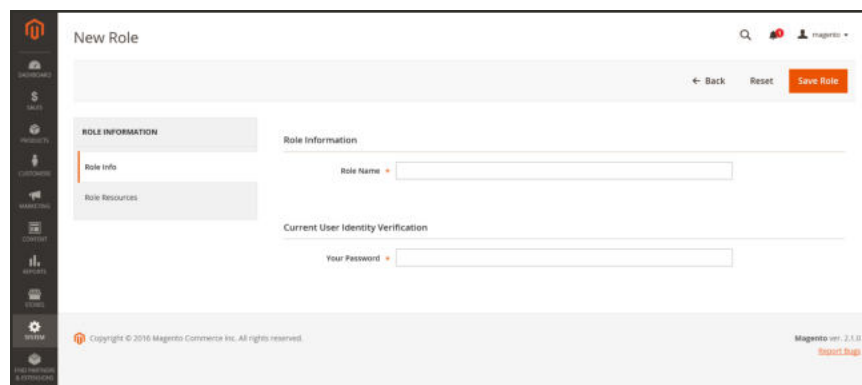
*Roles*

### To set up a role:

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **User Roles**.
2. In the upper-right corner, tap **Add New Role**. Then, do the following:

#### Step 1: Define the Role

1. Under **Role Information**, enter a descriptive **Role Name**.
2. Under **Current User Identity Verification**, enter **Your Password**.



*Role Name*

#### Step 2: Assign Resources

**Important!** When assigning resources, be sure to disable access to the Permissions tool if you are

limiting access for a given role. Otherwise, users will be able to modify their own permissions.

1. Set **Role Scopes** to one of the following:

- All
- Custom

If set to “Custom” for a multisite installation, mark the checkbox of the website and store where the role is to be used.

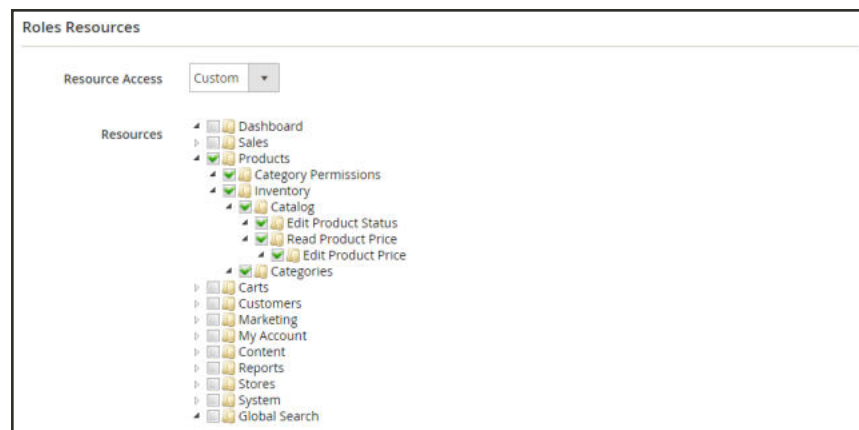


*Custom Role Scope*

2. Under **Roles Resources**, set **Resource Access** to “Custom.”

3. In the tree, mark the checkbox of each Admin **Resource** that the role can access.

To create an Admin role with access to tax settings, choose both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default **shipping point of origin**, you must also allow access to the System/Shipping resources for the role. The shipping settings determine the store tax rate that is used for catalog prices.



*Role Resources Assigned*

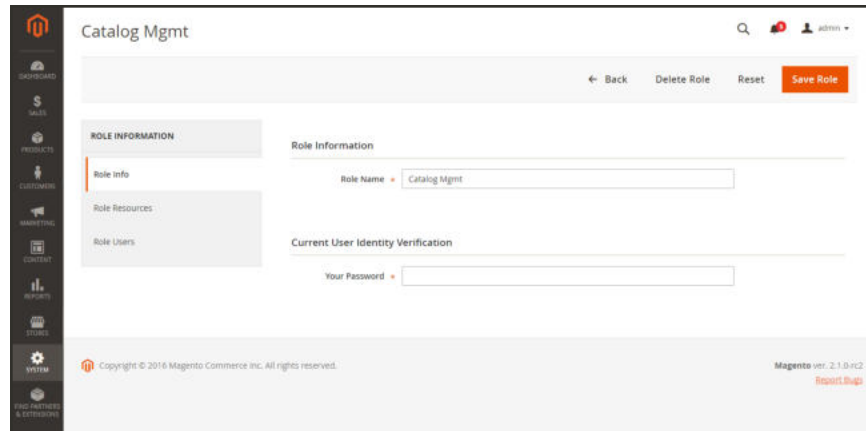
The list of available permissions may include additional options for Magento developed, Core Bundled, and installed extensions. By selecting the top-most permission for each feature, you assign all permissions available for the user.

4. When complete, tap **Save Role**.

The role now appears in the grid, and can be assigned to new user accounts.

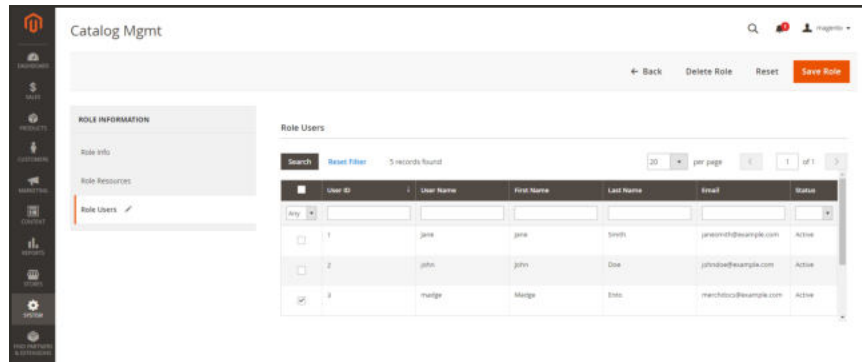
### To edit user role assignments:

1. From the **Roles** grid, open the record in edit mode.
2. Under **Current User Identity Verification**, enter **Your Password**.



*Editing a Role*

3. In the panel on the left, choose **Role Users**.  
The Role Users option appears only after a new role is saved.
4. To search for a specific user record, do the following:
  - a. Enter the value in the search filter at the top of a column. Then, press **Enter**.
  - b. When you are ready to return to the full list, click **Reset Filter**.
5. Mark the checkbox of any user(s) to be assigned to the role.
6. Tap **Save Role**.



*Role Users*

## Role Resources

Access to the following resources can be assigned to a custom role. See the linked page to learn more about the capabilities that are associated with each role.

### Role Resources

ROLE	DESCRIPTION
Dashboard	
Sales	Operations Orders Invoices Shipments Credit Memos Billing Agreements Transactions
Archive	
Shopping Cart Management	
Catalog	
Products	
Categories	
Carts	Shopping Cart Management
Customers	All Customers
Now Online	
Marketing	Promotions Catalog Price Rule Cart Price Rules
Communications	
Email Templates Newsletter Template Newsletter Queue Newsletter Subscribers	
SEO & Search	
Search Terms URL Rewrites	

**Role Resources (cont.)**

ROLE	DESCRIPTION	
		Site Map
	User Content	Reviews
My Account		
Content	Elements	Pages Blocks Widgets Media Gallery
	Design	Themes Schedule
Reports	Marketing Reviews Sales Customers Products Statistics	
Stores	Settings	All Stores Configuration Terms & Conditions Order Status
	Taxes	
	Currency	Currency Rates Currency Symbols
	Attributes	Product Update Attributes Attribute Set Ratings
	Other Settings	Customer Groups
System	Data Transfer	Import Export

**Role Resources (cont.)**

ROLE	DESCRIPTION
	<a href="#">Import/Export Tax Rates</a> <a href="#">Import History</a>
<a href="#">Magento Marketplace</a>	<a href="#">Connect Manager</a> <a href="#">Package Extensions</a>
<a href="#">Tools</a>	<a href="#">Cache Management</a> <a href="#">Web Setup Wizard</a> <a href="#">Backups</a> <a href="#">Index Management</a> <a href="#">Change Indexer Mode</a>
<a href="#">Permissions</a>	<a href="#">All Users</a> <a href="#">Locked Users</a> <a href="#">User Roles</a>
<a href="#">Other Settings</a>	<a href="#">Notifications</a> <a href="#">Custom Variables</a> <a href="#">Manage Encryption Key</a>

[Global Search](#)

## Alternate Media Storage

Magento Open Source gives you the option to store media files in a database on a database server, or on a Content Delivery Network (CDN), as opposed to storing them on the file system of the web server. The advantage of using alternate storage is that it minimizes the effort required to synchronize media when multiple instances of the system that are deployed on different servers that need access to the same images, CSS files, and other media files.

- [Database](#)
- [Content Delivery Network \(CDN\)](#)



## Using a Database

By default, all images, compiled CSS files, and compiled JavaScript files of the Magento instance are stored in the file system on the web server. You can choose to store these files in a database on a database server. One advantage of this approach is the option of automatic synchronization and reverse synchronization between the web server file system and the database. You can use the default database to store media or create a new one. To be able to use a newly created database as media storage, you must add information about it and its access credentials to the `env.php` file.

### Database Workflow

- 1 Browser requests media.** A page from the store opens in the customer's browser, and the browser requests the media that is specified in the HTML.
- 2 System looks for media in file system.** The system searches for the media in the file system and if found, passes it to the browser.
- 3 System locates media in database.** If the media is not found in the file system, a request for the media is sent to the database that is specified in the configuration.
- 4 System locates media in database.** A PHP script transfers the files from the database to the file system, and sent to the customer's browser. The browser request for media triggers the script to run as follows:
  - If web server **rewrites** are enabled for Magento and supported by the server, the PHP script runs only when the requested media is not found in the file system.
  - If web server rewrites are disabled for Magento, or not supported by the server, the PHP script runs anyway, even if the required media is available in the file system.

### To use a database for media storage:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **System**.
3. In the upper-left corner set **Store View** to “Default Config,” to apply the configuration at the global level.
4. Expand ☯ the **Storage Configuration for Media** section. Then, do the following:

The screenshot shows the 'Storage Configuration for Media' settings. It includes three main sections: 'Media Storage' with a dropdown set to 'Database' and a 'Use system value' checkbox; 'Select Media Database' with an empty dropdown and a checked 'Use system value' checkbox; and 'Environment Update Time' with a text input set to '3600' and a checked 'Use system value' checkbox. A 'Synchronize' button is present between the second and third sections, with a warning message below it: 'After selecting a new media storage location, press the Synchronize button to transfer all media to that location. Media will not be available in the new location until the synchronization process is complete.'

#### *Storage Configuration for Media (Database)*

- a. Set **Media Storage** to “Database.”
  - b. Set **Select Media Database** to the database you want to use.
  - c. Tap **Synchronize** to transfer the existing media to the newly selected database.
  - d. Enter the **Environment Update Time** in seconds.
5. When complete, tap **Save Config**.

## Using a Content Delivery Network

A Content Delivery Network (CDN) can be used to store media files. Although the version of Magento that is installed “on premise” does not include an integration with any specific CDN, you can use the CDN of your choice. **Magento Commerce (Cloud)** is an exception to this, and includes the Fastly CDN. To learn more, see **Fastly** in the Magento developer documentation.

After configuring the CDN, you must complete the configuration from the Admin. The changes can be made at either the global or website level. When a CDN is used for media storage, all paths to media on store pages are changed to the CDN paths that are specified in the configuration.

### CDN Workflow

- 1 Browser requests media.** A page from the store opens in the customer’s browser, and the browser requests the media that is specified in the HTML.
- 2 Request sent to CDN; images found and served.** The request is sent first to the CDN. If the CDN has the images in storage, it serves the media files to the customer’s browser.
- 3 Media not found, request sent to Magento web server.** If the CDN doesn’t have the media files, the request is sent to the Magento web server. If the media files are found in the file system, the web server sends them to the customer’s browser.

**Important!** For security, when a CDN is used as media storage, JavaScript may not function properly if the CDN is located outside of your subdomain.

### To configure a content delivery network:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. In the upper-left corner, set **Store View** as needed.
4. Expand ☺ the **Base URLs** section. Then, do the following:

#### *Base URLs*

- a. Update the **Base URL for Static View Files** with the URL of the location on the CDN where static view files are stored.
- b. Update the **Base URL for User Media Files** with the URL of the JavaScript files on the CDN.

Both these fields can be left blank, or can start with the placeholder: `{{unsecure_base_url}}`

5. Expand the **Base URLs (Secure)** section.

**Base URLs (Secure)**

Any of the fields allow fully qualified URLs that end with '/' (slash) e.g. https://example.com/magento/

**Secure Base URL** [store view]   Use system value  
Specify URL or , or placeholder.

**Secure Base Link URL** [store view]   Use system value  
May start with or placeholder.

**Secure Base URL for Static View Files** [store view]   Use system value  
May be empty or start with , or placeholder.

**Secure Base URL for User Media Files** [store view]   Use system value  
May be empty or start with , or placeholder.

**Use Secure URLs on Storefront** [store view]   Use system value  
Enter https protocol to use Secure URLs on Storefront.

**Use Secure URLs in Admin** [global]   Use system value  
Enter https protocol to use Secure URLs in Admin.

**Enable HTTP Strict Transport Security (HSTS)** [store view]   Use system value  
See [HTTP Strict Transport Security](#) page for details.

**Upgrade Insecure Requests** [store view]   Use system value  
See [Upgrade Insecure Requests](#) page for details.

**Offloader header** [global]   Use system value

*Base URLs (Secure)*

- a. Update the **Secure Base URL for Static View Files** with the URL of the location on the CDN where static view files are stored.
- b. Update the **Secure Base URL for User Media Files** with the URL of the JavaScript files on the CDN.

Both these fields can be left blank, or can start with the placeholder: `{{unsecure_base_url}}`

- 6. When complete, tap **Save Config.**

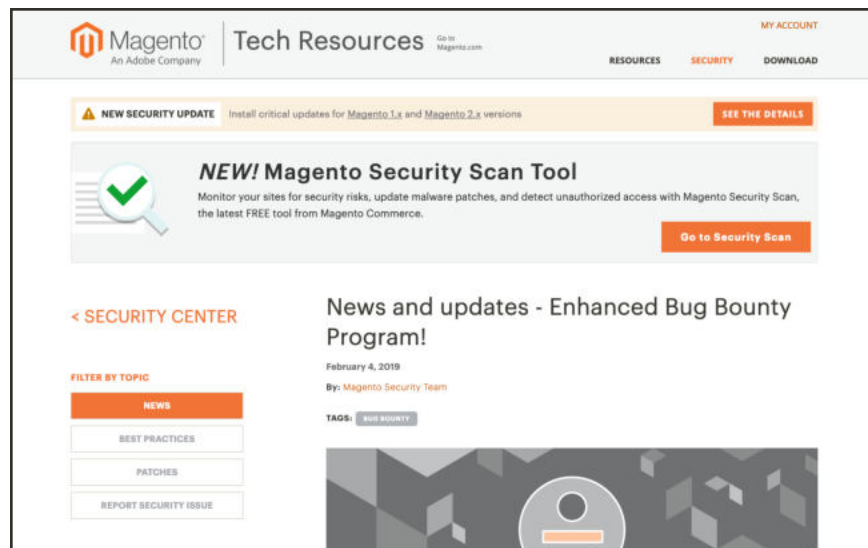
## CHAPTER 91:

# Security

In this section of the guide, you will learn security best practices, how to manage Admin sessions and credentials, implement CAPTCHA, and manage website restrictions.

- [Security Scan](#)
- [Security Best Practices](#)
- [Configuring Admin Security](#)
- [CAPTCHA](#)
- [Two-Factor Authentication](#)
- [Encryption Key](#)
- [Browser Capabilities Detection](#)

Make sure to set up a [Security Scan](#) for each domain in your Magento installation. Also, visit the [Security Center](#) and join the Security Alert Registry for the latest news about potential vulnerabilities and best practices.



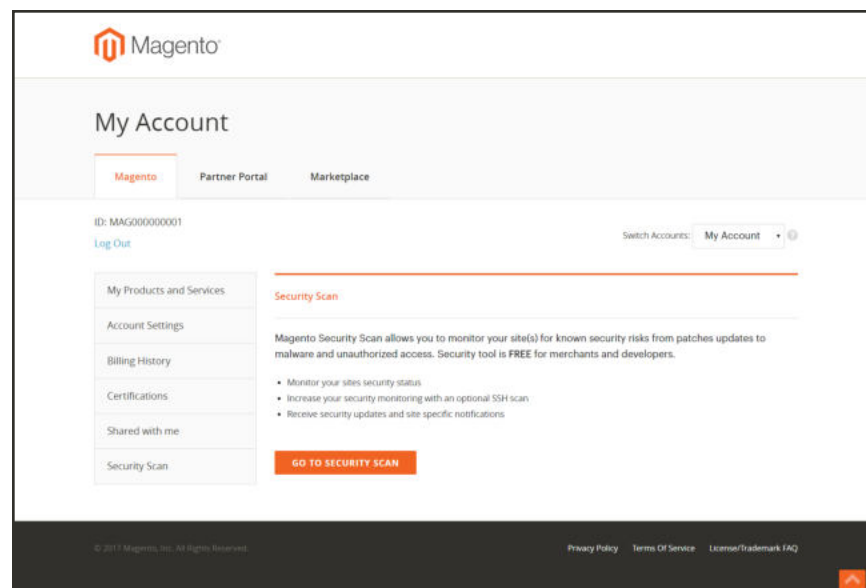
*Security Center*

## Security Scan

Magento Security Scan allows you to monitor each of your Magento sites for known security risks, and to receive patch updates and security notifications.

- Gain insight into the real-time security status of your store.
- Schedule security scan to run weekly, daily, or on demand.
- Receive reports with the results of over thirty security tests and the recommended corrective actions for each failed test.
- Maintain a history of security reports in your Magento account.

The Security Scan tool is available for free from the dashboard of your Magento account. For technical information, see [Go live and launch](#) in the developer documentation.

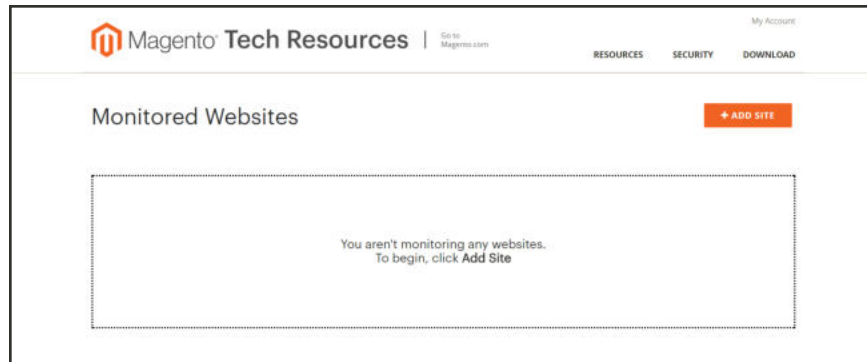


*Security Scan*

### To run Security Scan:

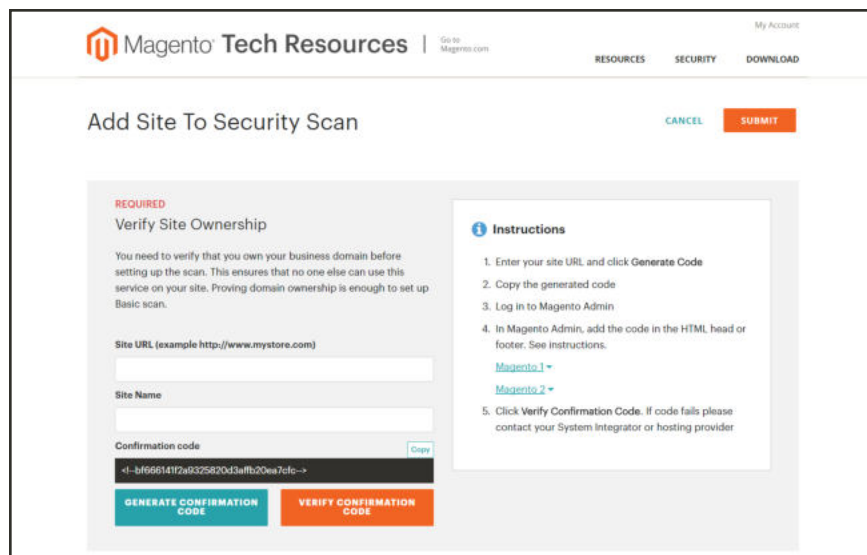
1. Go to the Magento home page, and sign in to your **Magento account**. Then, do the following:
  - a. In the panel on the left, choose **Security Scan**. Then, tap **Go to Security Scan**.
  - b. Read the **Terms and Conditions**. Then, tap **Agree** to continue.
2. On the **Monitored Websites** page, tap **+Add Site**.

If you have multiple sites with different domains, you must configure a separate scan for each domain.



*Monitored Sites*

3. To verify your ownership of the site domain, do the following:
  - a. Enter the **Site URL**, and tap **Generate Confirmation Code**.
  - b. Tap **Copy** to copy your confirmation code to the clipboard.



*Generate Confirmation Code*

4. Log in to the Admin of your store as a user with full Administrator privileges. Then, do the following:
  - a. In the Admin sidebar, choose **Content**. Then under **Design**, choose **Configuration**.
  - b. Find your site in the list, and click **Edit**.
  - c. Expand ☾ the **HTML Head** section.
  - d. Scroll down to **Scripts and Style Sheets**. Then, click in the text box at the end of any existing code, and press **Ctrl-V** to paste your confirmation code into the text box.





### Scripts and Style Sheets

- e. When complete, tap **Save Configuration**.
5. Return to the **Security Scan** page in your Magento account. Then, tap **Verify Confirmation Code** to establish your ownership of the domain.
6. After a successful confirmation, **Set Automatic Security Scan** to one of the following:

### Scan Weekly (recommended)

Choose the **Week Day**, **Time**, and **Time Zone** that the scan is to take place each week.

By default, the scan is scheduled to begin each week at midnight Saturday, UTC, and continue to early Sunday.

### Scan Weekly

### Scan Daily

Choose the **Time**, and **Time Zone** that the scan is to take place each day.

By default, the scan is scheduled to begin each day at midnight, UTC.

### Scan Daily

7. Enter the **Email Address** where you want to receive notifications of completed scans and security updates.



Receive report notifications and security updates at:

docs1@magento.com

\*this email will only be used for security updates and will **not** be used for sending promotional materials, event information etc.

*Email Address*

8. When complete, tap **Submit**.

After the ownership of the domain is verified, the site appears in the Monitored Websites list of your Magento account.

9. If you have multiple websites with different domains, repeat this process to set up a security scan for each.

## Security Best Practices

All eCommerce sites are attractive targets to hackers because of the personal and payment information that is required to complete a sale. Even if the system does not directly process credit card transactions, a compromised site might reroute customers to a false page, or alter an order before it is transmitted to the payment processor.

A compromised site can have long-term consequences for both customers and merchants. Customers might suffer financial loss and identify theft, while merchants can face damage to their reputations, loss of merchandise, higher processing fees, revoked privileges with financial institutions, and the threat of lawsuits.

This guide outlines a multifaceted approach to improve the security of your Magento installation. Although there is no single way to eliminate all security risks, there are many things that you can do to make your site a less attractive target. It is crucial for hosting providers, system integrators, and merchants to work together to establish and maintain a secure environment, implement methods for early detection, and determine a plan of action in the event of a breach.

### Start Right

Work with reliable hosting providers and solution integrators. When evaluating their qualifications, ask about their approach to security. Verify that they have a secure software development life cycle in accord with industry standards such as The Open Web Application Security Project ([OWASP](#)), and that they test their code for security issues.

If you are starting a new site, consider launching the entire site over HTTPs. Taking the lead on this issue, Google now uses HTTPs as a ranking factor.

For an existing installation, plan to upgrade the entire site to run over to a securely encrypted, HTTPs channel. Although you will need to create redirects from HTTP to HTTPs, the effort will future-proof your site. We recommend that you plan to make this change sooner, rather than later.

## Protect the Environment

Protecting the environment is the most critical aspect of ensuring the security of your store. Keep all software on the server up to date, and apply security patches as recommended. This applies not only to Magento, but to any other software that is installed on the server, including database software and other websites that use the same server. Any system is only as secure as the weakest link.

### Server Environment

- Make sure that the server operating system is secure. Work with your hosting provider to ensure that there is no unnecessary software running on the server.
- Use only secure communications protocol (SSH/SFTP/HTTPS) to manage files, and disable FTP.
- Magento includes `.htaccess` files to protect system files when using the Apache web server. If you use a different web server such as Nginx, make sure that all system files and directories are protected. For an sample Nginx configuration, see: [magento-nginx.conf](#) on GitHub.
- Use strong and unique passwords, and change them periodically.
- Keep the system up to date, and immediately install patches when new security issues are discovered.
- Closely monitor any issues that are reported for software components used by your Magento installation, including the operating system, MySQL database, PHP, Redis (if used), Apache or Nginx, Memcached, Solr, and any other components in your specific configuration.
- Limit access to `cron.php` file to only required users. For example, restrict access by IP address. If possible, block access completely and execute the command using the system cron scheduler.

### Advanced Techniques

- Automate the deployment process, if possible, and use private keys for data transfer.
- Limit access to the Magento Admin by updating the whitelist with the IP address of each computer that is authorized to use the Admin and Magento Connect downloader. For examples of how to whitelist IP addresses, see: [Secure Your Magento Admin](#).
- Do not install extensions directly on a production server.  
To disable the Magento Connect downloader on the production site, either remove or block access to the `/downloader` directory. You can also use the same [whitelisting](#) methods.

### Advanced Techniques (cont.)

- Use two-factor authorization for Admin logins. There are several extensions available that provide additional security by requiring an additional passcode that is generated on your phone, or a token from a special device.
- Review your server for “development leftovers.” Make sure there are no accessible log files, publicly visible .git directories, tunnels to execute SQL, database dumps, phpinfo files, or any other unprotected files that are not required, and that might be used in an attack.
- Limit outgoing connections to only those that are required, such as for a payment integration.
- Use a Web Application Firewall to analyze traffic and discover suspicious patterns, such as credit card information being sent to an attacker.

### Server Applications

- Make sure that all applications running on the server are secure.
- Avoid running other software on the same server as Magento, especially if it is accessible from the Internet. Vulnerabilities in blog applications such as Wordpress can expose private information from Magento. Install such software on a separate server or virtual machine.
- Keep all software up to date, and apply patches as recommended.

### Admin Desktop Environment

- Make sure that the computer that is used to access the Magento Admin is secure.
- Keep your antivirus software up to date, and use a malware scanner. Do not install any unknown programs, or click suspicious links.
- Use a strong password to log in to the computer, and change it periodically. Use a password manager such as [LastPass](#), [1Password](#), or [Dashlane](#) to create and manage secure, unique passwords.
- Do not save FTP passwords in FTP programs, because they are often harvested by malware and used to infect servers. We recommend using SFTP over FTP for file transfers.

## Protect Magento

Your effort to protect your Magento installation starts with the initial setup, and continues with the security-related configuration settings, password management, and ongoing maintenance.

### Your Magento Installation

- Use the latest version of Magento to ensure that your installation includes the most recent security enhancements.  
If for any reason you cannot upgrade to the latest version, make sure to install all security patches as recommended by Magento. Although Magento issues security patches to fix major issues, new product releases include additional improvements to help secure the site.
- Use a unique, [custom Admin URL](#) instead of the default “admin” or the often-used “backend”. Although it will not directly protect your site from a determined attacker, it can reduce exposure to scripts that try to break into every Magento site. (Never leave your valuables in plain sight.)

Check with your hosting provider before implementing a custom Admin URL. Some hosting providers require a standard URL to meet firewall protection rules.
- Block access to any development, staging, or testing systems. Use IP [whitelisting](#) and .htaccess password protection. When compromised, such systems can produce a data leak or be used to attack the production system.
- Use the correct file permissions. Core Magento and directory files should be set to ready only, including `app/etc/local.xml` files.
- Use a strong password for the Magento Admin. To learn more, see: [Creating a strong password](#).
- Take advantage of Magento’s security-related configuration settings for [Admin Security](#), [Password Options](#), [Two-Factor Authentication](#) for Admin access, [CAPTCHA](#), and [Google reCAPTCHA](#).
- Take advantage of Magento’s free [Magento Security Scan Tool](#)! Monitor your sites for security risks, update malware patches, and detect unauthorized access with this tool.

### Don’t be Taken for a Ride

- Install extensions only from trusted sources. Never use paid extensions that are published on Torrent or other sites. If possible, review extensions for security issues before installing them.
- Do not click suspicious links, or open suspicious emails.

- Do not disclose the password to your server or to the Magento Admin, unless you are required to do so.

## Be Prepared!

- Develop a disaster recovery/business continuity plan. Even a basic plan will help you get back on track in the event of a problem.
- Ensure that your server and database are automatically backed up to external location. A typical setup requires daily incremental backups, with a full backup on a weekly basis. Make sure to test the backup regularly to verify that it can be restored.
- For a large site, simple text file dumps of the database take an unacceptable amount of time to restore. Work with your hosting provider to deploy a professional database backup solution.

## Monitor for Signs of Attack

If your system is not immediately patched after a major security breach, there is a high probability that your site is already compromised. Complete a security review periodically to check for signs of attack, and also when contacted by customers with security-related concerns.

### Security Review

- Check periodically for unauthorized Admin users.
- Use automated log review tools such as [Apache Scalp](#).
- Work with your hosting provider to review server logs for suspicious activity, and to implement an Intrusion Detection System (IDS) on your network.
- Use a file and data integrity checking tool such as [TripWire](#) to receive notification of any potential malware installation.
- Monitor all system logins (FTP, SSH) for unexpected activity, uploads, or commands.

## Follow Your Disaster Recovery Plan

In the event of a compromise, work with your internal IT security team if available, or hosting provider, and system integrator to determine the scope of the attack. Taking into consideration the type of compromise and the size of the store. Then, adjust the following recommendations to your business needs.

1. Block access to the site, so the attacker cannot remove evidence or steal more information.
2. Backup the current site, which will include evidence of the installed malware or compromised files.
3. Try to determine the scope of the attack. Was credit card information accessed? What information was stolen? How much time has elapsed since the compromise? Was the information encrypted? Typically you can expect the following types of attack:

Defacing of Site	Site access is compromised, but often the payments information is not. User accounts might be compromised.
Botnetting	Your site becomes part of a botnet that sends spam email. Although data is probably not compromised, your server is blacklisted by spam filters which prevents email that you send to customers from being delivered.
Direct Attack on Server	Data is compromised, backdoors and malware are installed, and the site no longer works. Payment information—provided that it is not stored on the server— is probably safe.
Silent Card Capture	In this most disastrous attack, intruders install hidden malware or card capture software, or possibly modify the checkout process to collect and send out credit card data. Such attacks can go unnoticed for extended periods of time, and result in major compromise of customer accounts and financial information.

4. Try to find the attack vector to determine how the site was compromised, and when. Review server log files and file changes. Note that sometimes there are multiple different attacks on the same system.
5. If possible, wipe and reinstall everything. In case of virtual hosting, create a new instance. Malware might be hidden in an unsuspected location, just waiting to restore itself. Remove all unnecessary files. Then, reinstall all required files from a known, clean source such as files from your own version control system, or the original distribution files from magento.com.
6. Apply all the latest security patches necessary.
7. Reset all credentials, including the database, file access, payment and shipping integrations, web services, and Admin login.
8. If payment information was compromised, it might be necessary to inform your payment processor.



9. Inform your customers about the attack and the type of information affected. If payment information was compromised, they should look for unauthorized transactions. If personal information, including email addresses was compromised, they might be targeted with phishing attacks or spam.

### Additional Resources

For additional technical best practices and developer-centric information, see the following information.

- The [Magento Security blog](#) investigates and provides insights to security issues, best practices, and solutions for all of your security questions.
- Try out the free [Magento Security Scan Tool](#)! Monitor your sites for security risks, update malware patches, and detect unauthorized access with this tool from Magento Commerce.
- Check all available [Developer Tools](#) through the Admin. These features can help test, verify, and prepare your site and Admin for workloads and traffic.
- The Magento Community has limitless best practices, recommendations, and tutorials to help get you started with Magento, maintaining your catalogs, and much more. Check out the best [Community Resources](#).

### Acknowledgments

Parts of this article were inspired by real-world solutions that were shared by community members. The resulting article incorporates content from the community, with input from our team.

- Bryan (BJ) Hoffpauir for sharing his insight on the Magento forum, and for contributing recommendations in the Attack Response Plan section of this article. See the [original post](#) by [beejhuff](#) for more information.
- Anna Völkl ([@rescueann](#)), Magento developer at LimeSoda.
- Robert Mangiafico ([@robfico](#)) CTO at LexiConn.
- Dracony ([@dracony\\_gimp](#)) for his security presentation, [Being Hacked is Not Fun](#).
- Willem de Groot for providing a sample [Nginx configuration](#).

## Security Action Plan

If you suspect that your site is compromised, follow this action plan without delay.

- DIAGNOSE.** Run a scan to establish the security status of your Magento store. [MageReport.com](#) is a highly regarded service that is available at no charge to members of the Magento community.
- CLEAN.** Hire a [qualified consultant](#) or online service to clean your site of all malicious code. Some Magento community members recommend [Sucuri Website Malware Removal](#).
  - Check the /media folder for leftover executable code.
  - Remove all unknown Admin users and reset all Admin passwords.
- PROTECT.** Keep your Magento installation up-to-date with the most current release. If using an older version, apply all security patches as they become available.
  - Review and follow [Magento Security Best Practices](#).
  - Subscribe to [Magento Security Alerts](#).
- REPORT.** If you think that you have found a specific vulnerability in Magento, send a description of the problem with technical details to [security@magento.com](mailto:security@magento.com).
- UPGRADE.** For additional peace of mind that comes from 24/7 support, plan your upgrade now to [Magento Commerce Cloud](#).

## Configuring Admin Security

Magento recommends that you take a multifaceted approach to protect the security of your store. You can begin by using a **custom Admin URL** that is not easy to ascertain, rather than the obvious “Admin” or “Backend.” By default, passwords that are used to **log in** to the Admin must be seven or more characters long, and include both letters and numbers. As a **best practice**, use only strong Admin passwords that include a combination of letters, numbers, and symbols.

For increased security, consider implementing two-factor authentication that generates a token on a separate device. To learn more, see the selection of security-related extensions on [Magento Marketplace](#).

The Admin security configuration gives you the ability to add a secret key to URLs, require passwords to be case sensitive, and to limit the length of Admin sessions, the lifetime of passwords, and the number of login attempts that can be made before the Admin user account is **locked**. For increased security, you can configure the length of keyboard inactivity before the current session expires, and require the user name and password to be case-sensitive. For additional security, the Admin login can be configured to require a **CAPTCHA**.

For technical information, see [Security overview](#) in the developer documentation.

Setting	Value	Use system value
Admin Account Sharing	No	<input checked="" type="checkbox"/>
Password Reset Protection Type	By IP and Email	<input checked="" type="checkbox"/>
Recovery Link Expiration Period (hours)	2	<input checked="" type="checkbox"/>
Max Number of Password Reset Requests	5	<input checked="" type="checkbox"/>
Min Time Between Password Reset Requests	10	<input checked="" type="checkbox"/>
Add Secret Key to URLs	No	<input type="checkbox"/>
Login is Case Sensitive	No	<input type="checkbox"/>
Admin Session Lifetime (seconds)	900	<input checked="" type="checkbox"/>
Maximum Login Failures to Lockout Account	6	<input checked="" type="checkbox"/>
Lockout Time (minutes)	30	<input checked="" type="checkbox"/>
Password Lifetime (days)	90	<input checked="" type="checkbox"/>
Password Change	Forced	<input checked="" type="checkbox"/>

### Security

### To configure Admin security:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand ☺ the **Security** section. Then, do the following:
  - a. To prevent Admin users from logging in from the same account on different devices, set **Admin Account Sharing** to "No."
  - b. To determine the method that is used to manage password reset requests, set **Password Reset Protection Type** to one of the following:
 

By IP and Email	The password can be reset online after a response is received from the notification is sent to the email address associated with the Admin account.
By IP	The password can be reset online without additional confirmation.
By Email	The password can be reset only by responding by email to the notification that is sent to the email address associated with the Admin account.
None	The password can be reset only by the store administrator.
  - c. In the **Recovery Link Expiration Period (hours)** field, enter the number of hours a password recovery link remains valid.
  - d. To determine the maximum number of password requests that can be submitted per hour, enter the **Max Number of Password Reset Requests**.
  - e. In the **Min Time Between Password Reset Requests** field, enter the minimum number of minutes that must pass between password reset requests.
  - f. To append a secret key to the Admin URL as a precaution against exploits, set **Add Secret Key to URLs** to "Yes." This setting is enabled by default.
  - g. To require that the use of upper- and lowercase characters in any login credentials entered match what is stored in the system, set **Login is Case Sensitive** to "Yes."
  - h. To determine the length of an Admin session before it times out, enter the duration of the session in seconds, in the **Admin Session Lifetime (seconds)** field. The value must be 60 seconds or greater.
  - i. In the **Maximum Login Failures to Lockout Account** field, enter the number of times a user can try to log in to the Admin before the account is locked. By default, six attempts are allowed. Leave the field empty for unlimited login attempts.
  - j. In the **Lockout Time (minutes)** field, enter the number of minutes that an Admin account is locked when the maximum number of attempts is met.

- k.** To limit the lifetime of Admin passwords, enter the number of days a password is valid in the **Password Lifetime (days)** field. /For an unlimited lifetime, leave the field blank.
  - l.** Set **Password Change** to one of the following:
    - Forced                      Requires that Admin users change their passwords after the account is set up.
    - Recommended              Recommends that Admin users change their passwords after account is set up.
- 4.** When complete, tap **Save Config**.

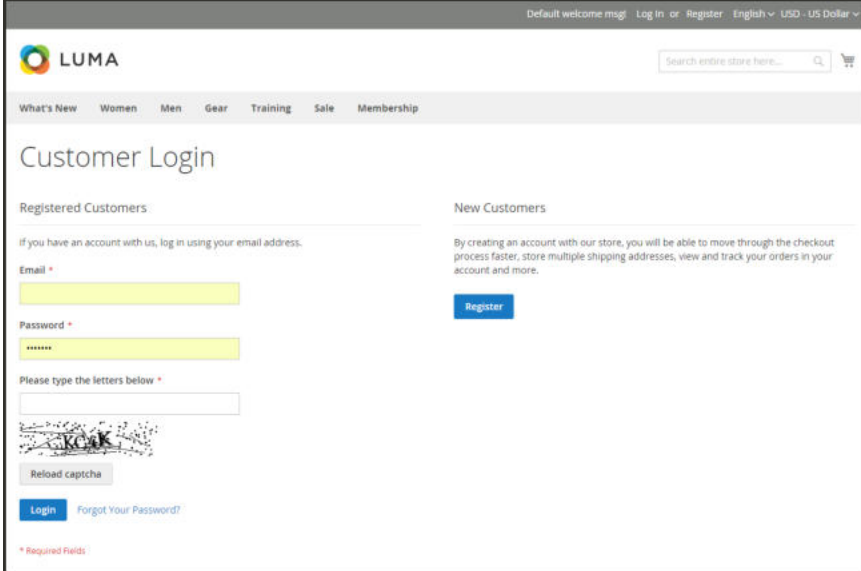
### Admin Password Requirements

FIELD	DESCRIPTION
Password	By default, an Admin password must be seven or more characters long, and include both letters and numbers.

## CAPTCHA

A CAPTCHA is a visual device that ensures that a human being, rather than a computer, is interacting with the site. CAPTCHA is an acronym for “Completely Automated Public Turing test to tell Computers and Humans Apart,” and can be used for both Admin and customer account logins.


You can reload the CAPTCHA as many times as is necessary by clicking the Reload icon in the upper-right corner of the image. The CAPTCHA is fully configurable and can be set appear every time, or only after a number of failed login attempts.

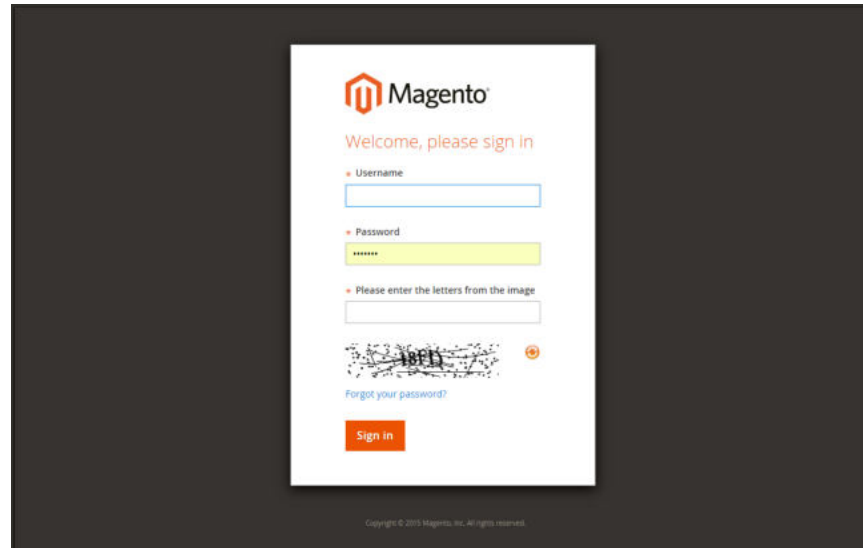


The screenshot displays the LUMA Customer Login page. At the top, there is a navigation bar with the LUMA logo, a search bar, and links for 'Log in or Register', 'English', 'USD', and 'US Dollar'. Below the navigation bar, there are menu items: 'What's New', 'Women', 'Men', 'Gear', 'Training', 'Sale', and 'Membership'. The main heading is 'Customer Login'. The page is divided into two sections: 'Registered Customers' and 'New Customers'. The 'Registered Customers' section includes a prompt 'if you have an account with us, log in using your email address.' and fields for 'Email' and 'Password'. Below these fields is a CAPTCHA challenge with the text 'Please type the letters below' and a 'Reload captcha' button. The 'New Customers' section includes a 'Register' button and a description of account benefits. At the bottom, there are 'Login' and 'Forgot Your Password?' buttons, and a '\* Required Fields' note.

*Customer Login with CAPTCHA*


## Admin CAPTCHA

For an extra level of security, you can add a CAPTCHA to the Admin Sign In and Forgot Password page. Administrator users can reload the displayed CAPTCHA by clicking the Reload  icon in the upper-right corner of the image. The number of reloads is unlimited.



*Admin Sign In with CAPTCHA*

### To configure an Admin CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**.
3. In the upper-right corner, set **Store View** to "Default."
4. Expand  the **CAPTCHA** section, and do the following:

The screenshot shows the 'CAPTCHA' configuration page with the following settings:

- Enable CAPTCHA in Admin:** Yes (dropdown),  Use system value
- Font:** LinLibertine (dropdown),  Use system value
- Forms:** Admin Login, Admin Forgot Password (checkboxes),  Use system value
- Displaying Mode:** After number of attempts to login (dropdown),  Use system value
- Number of Unsuccessful Attempts to Login:** 3 (text input),  Use system value. Note: If 0 is specified, CAPTCHA on the Login form will be always available.
- CAPTCHA Timeout (minutes):** 7 (text input),  Use system value
- Number of Symbols:** 4-5 (text input),  Use system value. Note: Please specify 8 symbols at the most. Range allowed (e.g. 3-5)
- Symbols Used in CAPTCHA:** ABCDEFGHJKMnpqrstuvwxyz23456789 (text input),  Use system value. Note: Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed. Similar looking characters (e.g. "l", "1") decrease chance of correct recognition by customer.
- Case Sensitive:** No (dropdown),  Use system value

*Admin CAPTCHA Configuration*

- a. Set **Enable CAPTCHA in Admin** to “Yes.”
- b. Enter the name of the Font to be used for the CAPTCHA symbols. Default font: LinLibertine

To add your own font, the font file must reside in the same directory as your Magento instance, and be declared in the config.xml file of the Captcha module at: `app/code/Magento/Captcha/etc`

- c. Select the **Forms** where the CAPTCHA is to be used:
  - Admin Login
  - Admin Forgot Password
- d. Set **Displaying Mode** to one of the following:

Always

CAPTCHA is always required to log in the Admin.

After number of attempts to login

When selected displays the Number of Unsuccessful Attempts to Login field. Enter the number of login attempts allowed. A value of 0 (zero) is similar to setting Displaying Mode to Always. This option does not cover the Forgot Password form. If CAPTCHA is enabled and set to be appear on this form, then it is always included on the form.



- e. Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.
  - f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page.
  - g. Enter the **Number of Symbols** used in the CAPTCHA, up to eight. For a variable number of symbols that changes with each CAPTCHA, enter a range, such as 5-8.
  - h. In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.
  - i. To require that users enter the characters exactly as shown set **Case Sensitive** to “Yes.”
5. When complete, tap **Save Config...**

## Customer CAPTCHA

Customers can be required to enter a CAPTCHA each time they log in to their accounts, or after several unsuccessful attempts to log in. CAPTCHA can be used for the following forms in the storefront:

- Create User
- Login
- Forgot Password
- Checkout as Guest
- Register During Checkout
- Contact Us
- Payflow Pro (Requires installing a patch according to KB [PayPal Payflow Pro active carding activity](#).)

**CAPTCHA**

**Enable CAPTCHA on Storefront** [website]   Use system value

**Font** [website]   Use system value

**Forms** [website]   Use system value

CAPTCHA for "Create user" and "Forgot password" forms is always enabled if chosen.

**Displaying Mode** [website]   Use system value

**Number of Unsuccessful Attempts to Login** [website]   Use system value

If 0 is specified, CAPTCHA on the Login form will be always available.

**CAPTCHA Timeout (minutes)** [website]   Use system value

**Number of Symbols** [website]   Use system value

Please specify 8 symbols at the most. Range allowed (e.g. 3-5)

**Symbols Used in CAPTCHA** [website]   Use system value

Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed. Similar looking characters (e.g. "l", "1", "0") decrease chance of correct recognition by customer.

**Case Sensitive** [website]   Use system value

*Customer CAPTCHA Configuration*

### To configure a Storefront CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **CAPTCHA** section, and do the following:

- a. Set **Enable CAPTCHA on Frontend** to “Yes.”
- b. Enter the name of the Font to be used for the CAPTCHA symbols.

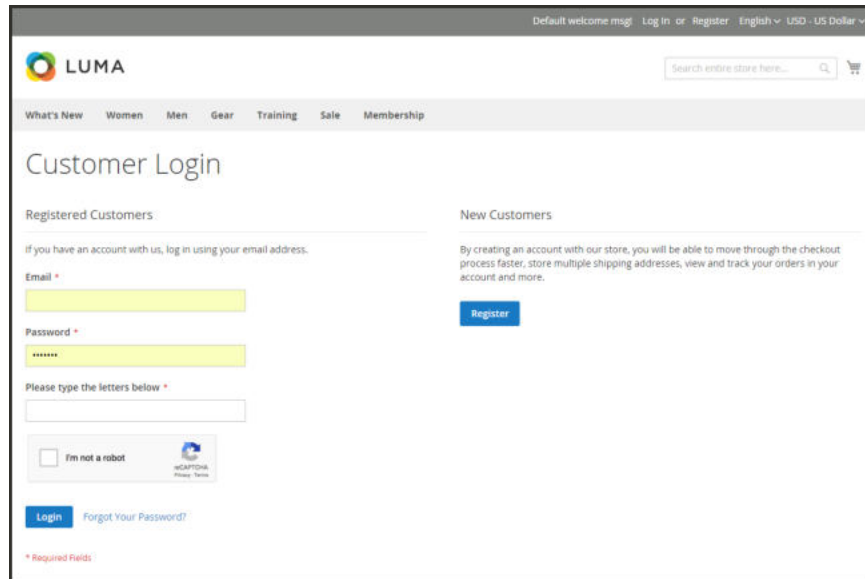
To add your own font, the font file must reside in the same directory as your Magento instance, and be declared in the `config.xml` file of the CAPTCHA module.

- c. Choose one of the following **Forms** where CAPTCHA is to be used.

- Create User
  - Login
  - Forgot Password
  - Checkout as Guest
  - Register during Checkout
  - Payflow Pro (Requires installing a patch according to KB [PayPal Payflow Pro active carding activity.](#))
- d.** Set **Displaying Mode** to one of the following:
- |                                   |  |
|-----------------------------------|--|
| Always                            | CAPTCHA is always required to access the selected form(s).   |
| After number of attempts to login | Enter the number of login attempts before the CAPTCHA appears. A value of 0 (zero) is similar to “Always.” When selected, the number of unsuccessful login attempts appears. |
|                                   | This option does not apply to the Forgot Password form, which always display the CAPTCHA, if enabled,  |
- e.** Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.
  - f.** In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page to generate a new CAPTCHA.
  - g.** Enter the **Number of Symbols** in the CAPTCHA, up to eight. For a variable number of symbols that change with each CAPTCHA, enter a range such as 5-8.
  - h.** In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.
  - i.** To require that the user enter the upper-and lowercase characters exactly as shown set **Case Sensitive** to “Yes.”
- 4.** When complete, tap **Save Config**.

## Google reCAPTCHA

Google reCAPTCHA ensures that a human being, rather than a computer, is interacting with the site. It provides enhanced security over Magento CAPTCHA, performs checks without potential user error when entering a series of letters and numbers, and encourages cart conversion without additional hurdles to complete a purchase.



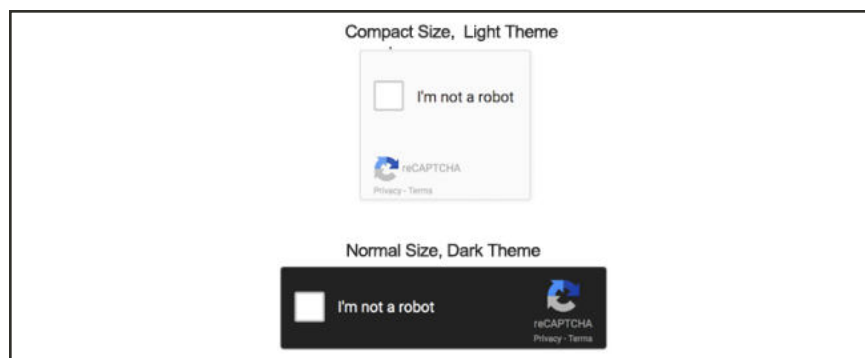
Customer Login with reCAPTCHA v2

Google reCAPTCHA verifies users with increased security and reduced clicks for each of completion, and can be implemented in two ways:

- reCAPTCHA v2 verifies users and customers using an on-click feature proving "I am not a robot."
- Invisible reCAPTCHA (**recommended**) performs background verification without user interaction. Users and customers are automatically verified without clicking anything.

You can use Google reCAPTCHA on the **Admin Sign In** page, and on various customer pages in the storefront. The styling options include your choice of a light or dark theme, and either a compact or normal size.

If you have the standard **Magento CAPTCHA** enabled, reCAPTCHA will override it. You can have both enabled on your Magento instance without issues.



Google reCAPTCHA Styles

## Step 1: Generate Google reCAPTCHA keys

Google reCAPTCHA requires a pair of API keys to enable. You can get these keys free of charge through the [reCAPTCHA site](#). Before generating the keys, consider the type of reCAPTCHA you want to use.

1. Visit the [Google reCAPTCHA page](#), and log in to your account. Then, do the following:
  - a. Enter a **Label** for the keys. For example, enter Magento. You only need one set of keys for your entire Magento instance.
  - b. Choose the type of Google reCAPTCHA that you want to use:
    - reCAPTCHA V2      Verifies with a button click.
    - Invisible reCaptcha      Verifies in the background without interaction.
  - c. In the **Domains** text box, enter a list of domains without the HTTP or HTTPS prefix, one per line. Google verifies the addresses entered.
    - Add your Magento instance domain and any subdomains.
    - You can add localhost, other local VM domains, and staging domains as needed for testing.
  - d. Mark the checkbox to **Accept the reCAPTCHA Terms of Service**.
  - e. (Optional) Mark the **Send alerts to owners** checkbox to send notification if Google detects issues or suspicious traffic.

The screenshot shows the Google reCAPTCHA registration interface. At the top, it says 'Register a new site'. There are four main sections:
 

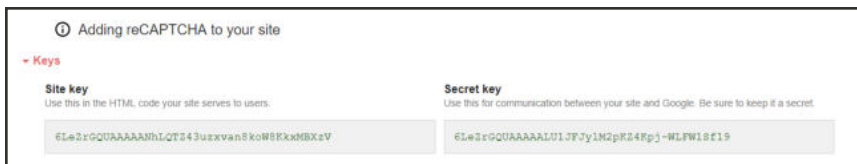
- Label:** A text input field with a placeholder 'For example, example.com, Comments page'.
- Choose the type of reCAPTCHA:** Three radio button options:
  - reCAPTCHA v2 (Validate requests with the "I'm not a robot" checkbox)
  - Invisible reCAPTCHA** (Validate requests in the background) - This option is selected.
  - reCAPTCHA Android (Validate requests in your android app)
- Domains:** A text input field with a placeholder 'For example: example.com, example.net, example.org'.
- Terms and Alerts:** Two checkboxes:
  - Accept the reCAPTCHA Terms of Service
  - Send alerts to owners

 A blue 'Register' button is located at the bottom right of the form.

*Google reCAPTCHA Site Registration*

2. Tap **Register**, and do the following:

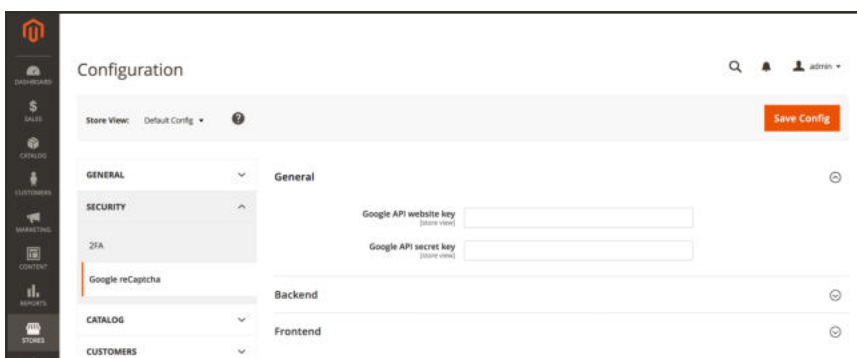
- a. When the domain(s) you added appear at the top of the page, choose the Magento domain to get your keys.
- b. Scroll down to the **Adding reCAPTCHA to your site** section and expand **Keys**. You will need these keys when enabling Google reCAPTCHA.



Site Key and Secret Key

### Step 2: Configure Google reCAPTCHA in Magento

- 1. Sign in to the Admin of your Magento store. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
- 2. In the upper-right corner, set **Store View** to “Default Config.”
- 3. In the panel on the left under **Security**, choose **Google reCAPTCHA**. Then, expand the **General** section, and enter the following generated keys:
  - Google API website key
  - Google API secret key



Google reCAPTCHA keys

- 4. Expand ( ☺ ) the **Backend** section, and do the following:
  - a. Set **Enable** to “Yes.”
  - b. To change the **Theme**, clear the **Use system value** checkbox. Then, choose one of the following:

- Light
  - Dark
- c. To change the **Size**, clear the **Use system value** checkbox. Then, choose one of the following:
- Normal
  - Compact


**Backend**

Enable [global] Yes

Theme [global] Light Theme  Use system value

Size [global] Normal  Use system value

*Google reCAPTCHA Backend*

5. Expand (  ) the **Frontend** section. Then, do the following to add Google reCAPTCHA to customer accounts:

**Frontend**

Enable [website] Yes

reCaptcha type [website] reCaptcha v2  Use system value

Theme [website] Light Theme  Use system value

Language Code [store view]   Use system value

Optional. Forces the widget to render in a specific language. Auto-detects the user's language if unspecified.  
See [supported Language codes](#).

Size [website] Normal  Use system value

Use in login [website] Yes  Use system value

Use in Forgot password [website] Yes  Use system value

Use in Contact [website] Yes  Use system value

Use in Create user [website] Yes  Use system value

*Google reCAPTCHA Frontend*

- a. Set **Enable** to “Yes”.
- b. Choose the **reCAPTCHA type** you want used in Admin forms. You must have added the correct API keys for the type.

- reCAPTCHA v2 validates with the “I’m not a robot” checkbox.
  - Invisible reCAPTCHA (**recommended**) validates in the background without requiring user interactions.
  - c. To change the **Theme**, uncheck **Use system value** checkbox and select a Light or Dark Theme from the drop-down menu.
  - d. To change the **Size**, uncheck **Use system value** checkbox and select a theme from the drop-down menu: Normal or Compact.
  - e. Select when to use reCAPTCHA for customer accounts. By default, reCAPTCHA is enabled for these pages.
    - Use in Login
    - Use in Forgot password
    - Use in Contact
    - Use in Create user
    - Use in PayPal PayflowPro payment form (Requires installing a patch according to KB [PayPal Payflow Pro active carding activity](#).)
6. When complete, tap **Save Config**.

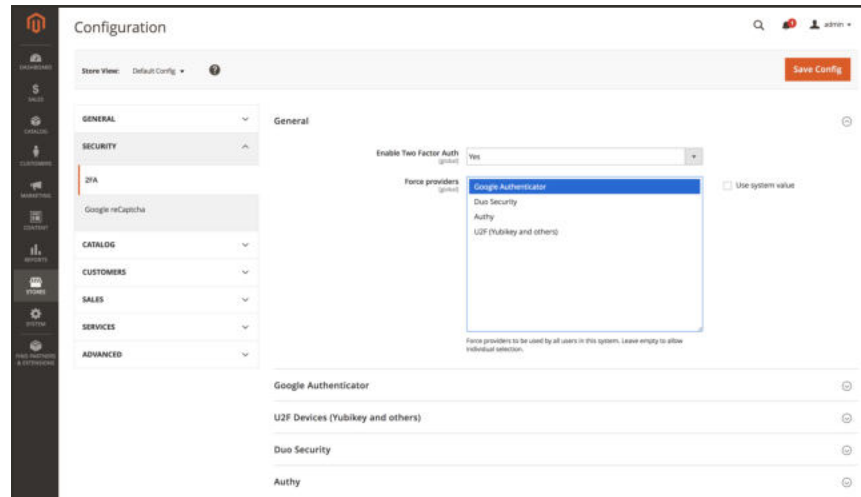
## Two-Factor Authentication

The Magento Admin provides all access to your store, orders, and customer data. To further increase security to your Magento instance, Magento Two-Factor Authentication (2FA) adds support for two-step authentication for multiple providers. When enabled, users attempting to access the Admin must complete a second step to verify their account. All features and requirements are restricted to Admin user accounts, not extended to customer accounts.


### Step 1: Enable 2FA and Supported Providers

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Security**, choose **2FA**.





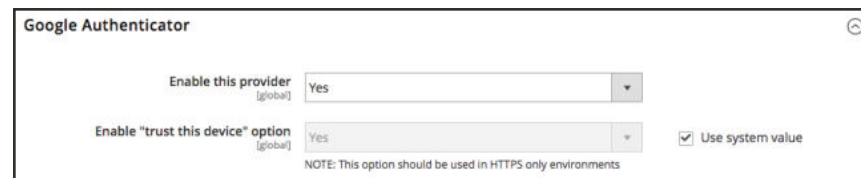
*Enable 2FA for the Admin*

3. Expand (  ) the **General** section, if necessary. Then, set **Enable Two Factor Auth** to “Yes.”
4. (Optional) For **Force Providers**, select the authenticators you require for all users. To allow users to select their own authenticator, do not select an option.
5. Enable and configure each authentication provider that you support. Each enabled authenticator becomes a supported option for user accounts.

### Google Authenticator

1. Set **Enable this provider** to “Yes.”
2. (Optional) Set **Enable “trust this device” option** to one of the following:

- |     |  |
|-----|--|
| Yes | The user does not have to enter their authenticator code for every login per device. |
| No  | Forces authentication for every login.   |



*Google Authenticator*

### U2F Devices (Yubikey and others)

1. Set **Enable this provider** to “Yes.”
2. (Optional) Set **Enable “trust this device” option** to one of the following:

- Yes The user does not have to enter their authenticator code for every login per device.
- No Forces authentication for every login.

*U2F Devices*

## Duo Security

- Set **Enable this provider** to “Yes.”
- (Optional) Set **Enable “trust this device” option** to one of the following:
 

Yes The user does not have to enter their authenticator code for every login per device.

No Forces authentication for every login.
- Enter the following keys for your account:
  - Integration key
  - Secret key
- Enter the **API hostname**.

*Duo Security*

## Authy

- Set **Enable this provider** to “Yes.”
- Enter the **API key** for your Authy account.
- (Optional) Set **Enable “trust this device” option** to one of the following:

- Yes      The user does not have to enter their authenticator code for every login per device.
- No      Forces authentication for every login.
4. (Optional) To change the **OneTouch Message**, clear the **Use system value** checkbox. Then, enter the message that you want to use.

Authy

5. When complete, tap **Save Config**.

## Step 2: Configure Required Authenticator Provider

You must choose at least one authenticator supported per user account, or force an authenticator globally for all accounts. We recommend setting or forcing only one authenticator for the Magento Admin. If you select multiple authenticators, the user must input tokens for all selections.

Set required authenticators per user account	Supports multiple types of authenticators and allows you to set an authenticator per account depending on user or office needs.
Force global authenticator for all accounts	Strictly requires all Magento Admin users to access using the selected authenticator(s).

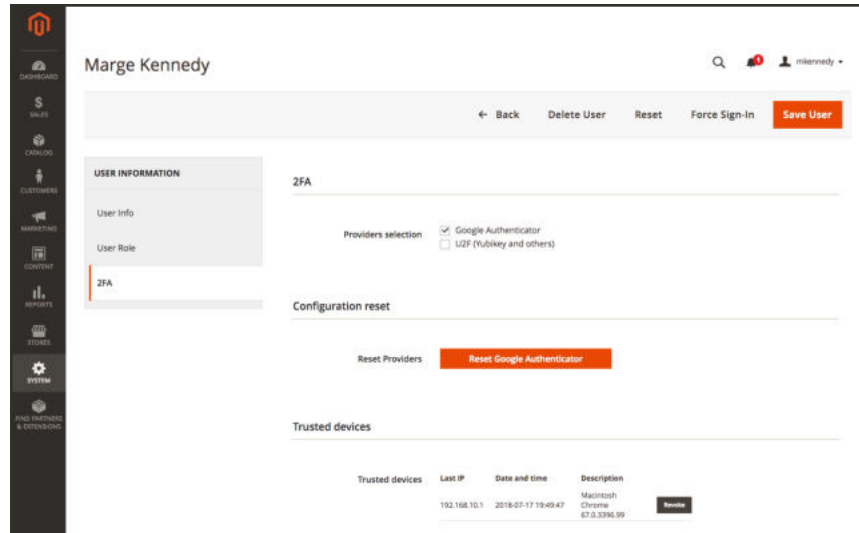
### Set required authenticators per user account:

With one or more authenticators enabled for the Magento Admin, you can require one or more authenticators per Admin user account. For this option, keep **Use system value** checked for **Force providers** and enable/configure supported authenticator providers.

We recommend only enabling one authenticator per account. If you require multiple authenticators, the user must authenticate with each one. For example, if you select Google and U2F, the user must access with a Google Authenticator code and connect a U2F device.

1. On the Admin sidebar, tap **System**. Then under **Settings**, choose **All Users**.
2. Do one of the following:
  - Select and edit a user from the list.
  - Add a new user account.
3. In the sidebar under **2FA** section,

4. Mark the checkbox of the authenticator that you want to require for the user account. The list includes all enabled and configured authenticator providers.
5. When complete, tap **Save User**.

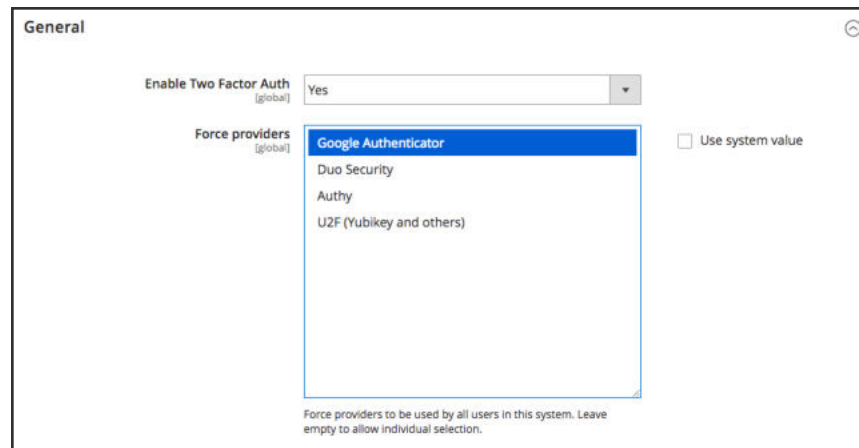


*Enable 2FA for User*

### Force global authenticator for all accounts:

This option requires all Admin users to configure and use all forced authenticators to access the Magento Admin. We recommend that you assign one authenticator to be forced.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Security**, choose **2FA**. Then, do the following:
  - a. In the **General** section, clear the **Use system value** checkbox for Force providers.
  - b. Select one or more authenticators.
3. When complete, tap **Save Config**.



*Force providers for all user accounts*

## Using Two-Factor-Authentication

Follow the instructions for the method of authentication that you want to use.

### U2F Key

With the U2F device configured, the user attaches the device to their system when logging into the Admin. For more information, check your U2F vendor documentation, such as [YubiKey](#) by Yubico.

1. Enter Magento Admin account credentials and sign in to your account.



*U2F Key Access*

2. Press the button on the key. Authentication immediately triggers and opens the Admin.
3. Insert the **U2F key** into a USB port on your computer.

### Google Authenticator

#### Step 1: Configure Google Authenticator

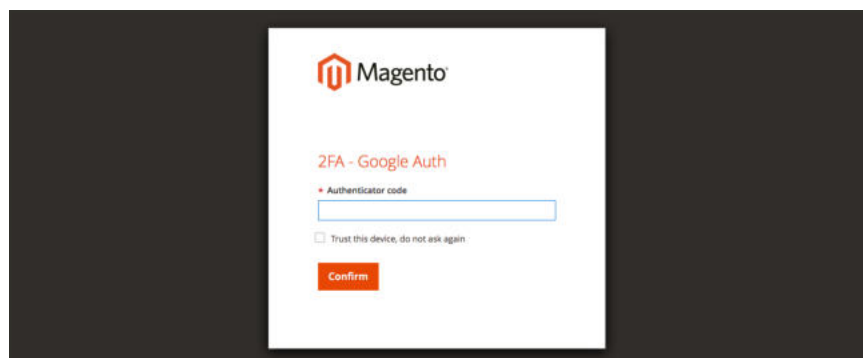
1. Enter Magento Admin account credentials and log in.  
A new authenticator screen appears with a QR code.
2. Open the **Google Authenticator** app on your mobile device.
3. Tap the plus sign ( + ) to add a new entry. Then, do the following:
  - a. Line up the red box with the QR code to scan with the camera on the mobile device.
  - b. When it recognizes the QR code and adds an entry, enter that 6-digit code in the Admin **Authenticator code** field.
4. When complete, tap **Confirm**.



*Google Authenticator QR code*

## Step 2: Sign In with Google Authenticator

1. Enter your Magento Admin account credentials and sign in.



*Google Authenticator QR code*


2. Open **Google Authenticator** on your mobile device.
3. When prompted, enter the 6-digit Authentication code.
4. To save the authentication for future logins, mark the **Trust this device, do not ask again** checkbox.
5. When complete, tap **Confirm**.

## Authy

The Authy authenticator includes multiple types of apps available from this page, including: Mobile App, Desktop App, and Chrome App. For details on setup, see [Authy documentation](#).

### Step 1: Configure Authy

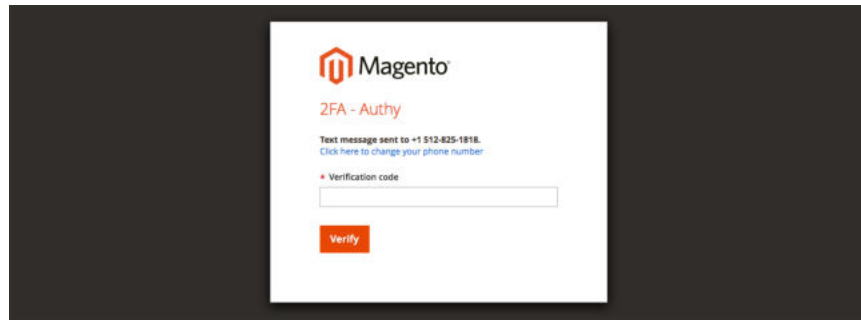
1. Enter Your Magento Admin account credentials and sign in.

A screenshot of the Magento 2FA - Authy registration form. The form is white and centered on a dark background. It features the Magento logo at the top, followed by the title "2FA - Authy" and the instruction "Please register yourself to Authy". Below this are three fields: "Country" (a dropdown menu with "Afghanistan" selected), "Phone number" (a text input field), and "Verification method" (a dropdown menu with "Send me an SMS" selected). At the bottom of the form is an orange "Continue" button.

*Authy registration*

2. When prompted to register yourself with Authy, do the following:
  - a. Select your **Country**.
  - b. Enter your **Phone number**.
  - c. Select one of the following **Verification methods**:
    - SMS
    - Call Me
  - d. Tap **Continue**.

A message is sent to your phone through SMS text or a call.
3. Enter the **Verification code** that you receive, and tap **Verify**. Then when prompted, tap **Confirm**.



*Authy verification code*

**Step 2: Sign In with Authy**

1. Enter Magento Admin account credentials and sign in.



*Authy access*

2. Choose one of the following methods to authenticate:
 

Use one touch	Sends an alert to your Authy app. In the app, accept the access.
Use authy token	Prompts to enter a code from your Authy app.
  
3. The app includes additional emergency methods if you have trouble signing in. Choose the method you want to use to receive the code. Then, enter the code that you receive to access the Admin.
 

Send me a code via SMS	A text SMS message is sent to the configured mobile device.
Send me a code via phone call	The user receives a phone call with a code.

Your account is verified and opens.



## Duo

The Duo Mobile app is available through [Google Play](#) or [iOS App Store](#). To use, it must be activated and linked to an account. For details, your security staff should obtain a Duo account and complete setup.

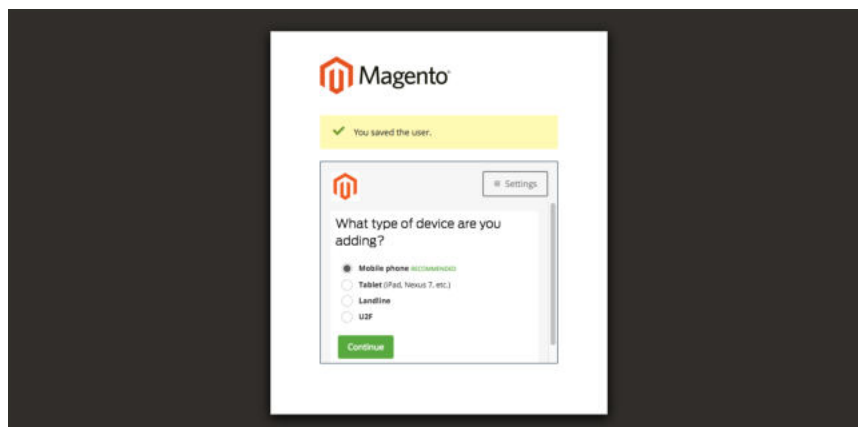
### Step 1: Configure Duo

1. Enter Magento Admin account credentials and sign in to your account.
2. When the Duo Setup page appears, tap **Start setup**. Then, do the following:



*Duo Setup*

- a. Select your device.



*Device Type*

- b. When prompted, enter your **phone number**, and tap **Continue**.

This example requests your phone number, because we're using a mobile device.



*Enter Your Phone Number*

- c. When prompted to install Duo Mobile for your phone type, tap **I have Duo Mobile**.



*Verify App Installation*

3. Open Duo Mobile, and scan the **QR code** to sync the authenticator with Magento. A checkmark appears when the activation is complete.



*Duo Verification Code*

4. To configure your settings for the device, choose the action that you want to take place when you sign in.

Ask me to choose an authenticator method

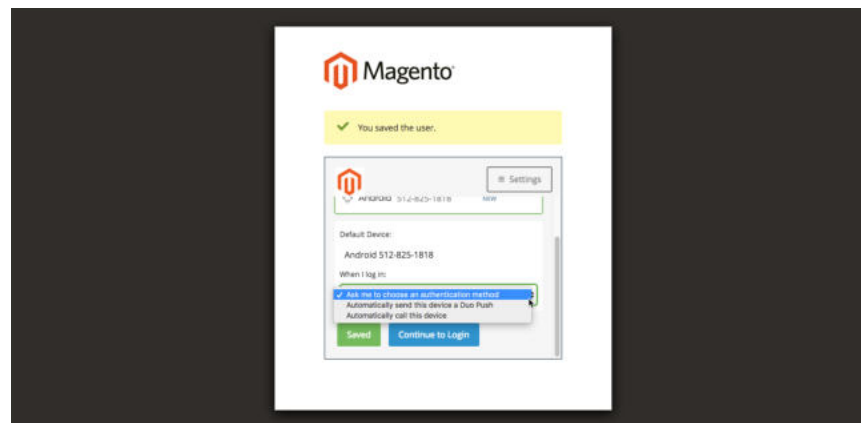
Allows the user to select when logging in and authenticating in the Magento Admin.

Automatically send this device a Duo Push

Sends a message to your device to accept or deny for access.

Automatically call this device

Calls and provides a passcode for entering



*Duo verification code*

## Step 2: Sign In with Duo

The following example displays the options when selecting Ask me to choose an authenticator method:

1. When prompted, enter Enter Magento Admin credentials to log in.



*Duo access*

2. Choose the method that you want to use to authenticate:

Send Me a Push	Tap to receive a push notice to Duo Mobile. Accept to authenticate.
Call Me	Tap this option, receive a call with a code, and enter the passcode.
Enter a Passcode	Tap this option to receive and enter a passcode.

3. Complete the push or code to fully sign in to the Admin.

## Managing Two-Factor Authentication

If a user has issues accessing the Magento Admin with their authenticator, they can attempt to sync or troubleshoot their authenticator. You can also reset the authenticator associated with the account. When reset, the user must reconnect and add the authenticator again when they next access the Admin.

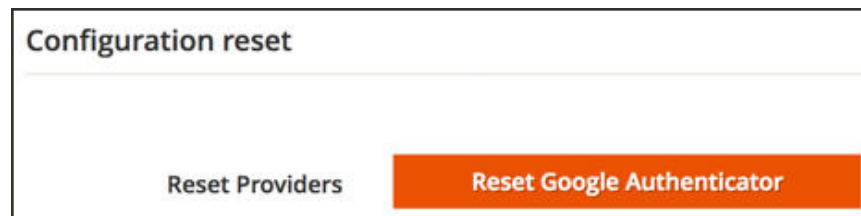
If you have issues accessing the Magento Admin with the authenticators, consider the following:

- Some mobile apps include options to sync. This option reconnects the app and server, updating in case time settings changed on the device or server.
- Revoking a device or resetting an authenticator can help users connect.
- Clearing web cache and cookies for the Magento instance can also help. Authenticators, like Google, use generated cookies to save access and duration. Clear your cookies for your specific browser and Magento instance domain.
- If you have blocked cookies for your browser, this will block some authenticators, like Google, from completing verification and access. Add a rule to allow cookies for your Magento instance.

### To reset authenticators per account:

Resetting an authenticator also revokes all trusted devices tracked by the Admin.

1. On the Admin sidebar, tap **System**. Then under Permissions, choose **All Users**.
2. Select and edit a user from the list or add a new user account.
3. Tap **2FA**.
4. Click the **Reset...** option for one or more listed authenticators.



*Reset authenticators on an account*

### To revoke a trusted device:


Some users may have authenticator access issues after syncing or no longer have access to a device with previous access to the Magento Admin. If you have the option enabled to track trusted devices for an authenticator, every device that accesses the Admin has a saved entry.

These entries detect the device and allow log in access without requiring authentication. The entries include the last IP address, the data and time of access, and a description including the type of system (Mac, PC, tablet, etc) and browser with version.

After revoking a listed device, the user must authenticate again if accessing the Admin from it.

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **All Users**.
2. Do one of the followign:
  - Select and edit a user from the list.
  - Add a new user account.
3. Tap **2FA**.
4. In the **Trusted devices** grid, locate a device to remove from the account. Then, tap **Revoke**.

If the user accesses the Admin from this device again, they must authenticate regardless of any cookies with active duration.

Trusted devices			
Trusted devices	Last IP	Date and time	Description
		2018-07-06 19:32:38	Macintosh Firefox 61.0

*Revoke a trusted, authenticated device*

## Emergency CLI Commands

Use the following commands if you lose access to the Admin.

### To disable 2FA:

If you have issues with 2FA, you can disable it from command-line. This will disable 2FA globally.

#### Disable Module

```
php bin/magento msp:security:tfa:disable
```

### To reset authenticator per account:

If you need to manually reset a single user configuration, enter the following from the command-line. The command restarts configuration and 2FA subscription for the user account.

#### Reset Authenticator per Account

```
php bin/magento msp:security:tfa:reset <username> <provider>
```

## Examples

#### Reset Google Authenticator

```
php bin/magento msp:security:tfa:reset admin google
```

#### Reset U2F Device

```
php bin/magento msp:security:tfa:reset admin u2fkey
```

#### Reset Authy

```
php bin/magento msp:security:tfa:reset admin authy
```

### Advanced Emergency Steps

Do not attempt modifying any database information without full understanding of modifications and database management. This is an advanced procedure.

In your database, you can modify the following tables and values to affect and override 2FA. We advise caution when making any changes directly to your database.

**Table:** `core_config_data`

`msp/twofactorauth/enabled` Set to zero to disable 2FA globally.

`msp/twofactorauth/force_providers` Delete this entry to remove forced providers option.

**Table:** `msp_tfa_user_config`

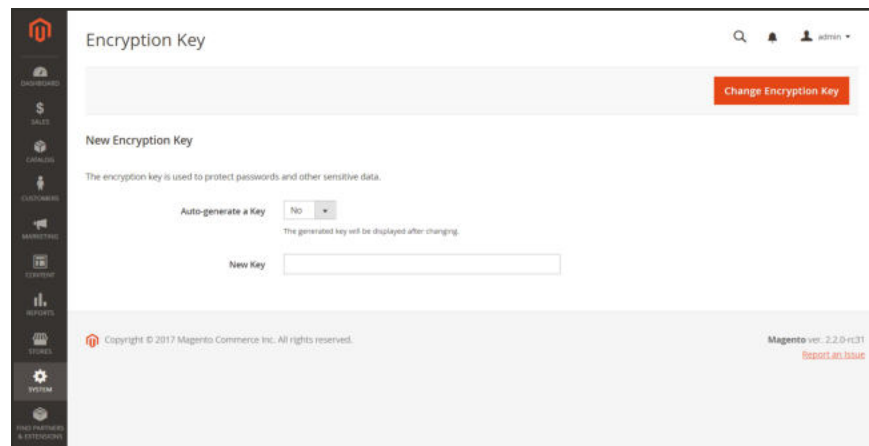
Delete one user row to reset the user's 2FA preference and configuration.

## Encryption Key

Magento uses an encryption key to protect passwords and other sensitive data. An industry-standard Advanced Encryption Standard (AES-256) algorithm is used to encrypt all data that requires decryption. This includes credit card data and integration (payment and shipping module) passwords. In addition, a strong Secure Hash Algorithm (SHA-256) is used to hash all data that does not require decryption.

During the initial installation, you are prompted to either let Magento generate an encryption key, or enter one of your own. The Encryption Key tool allows you to change the key as needed. The encryption key should be changed on a regular basis to improve security, as well as at any time the original key might be compromised. Whenever the key is changed, all legacy data is re-encoded using the new key.

For technical information, see [Install the Magento](#) software in the developer documentation.



*Encryption Key*



### Step 1: Make the File Writable

To change the encryption key, make sure that the following file is writable:

```
[your_store]/app/etc/env.php
```

### Step 2: Change the Encryption Key

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Manage Encryption Key**.
2. Do one of the following:
  - To generate a new key, set **Auto-generate Key** to “Yes”.
  - To use a different key, set **Auto-generate Key** to “No”. Then in the **New Key** field, enter or paste the key that you want to use.
3. Tap **Change Encryption Key**.
4. Keep a record of the new key in a safe place. It will be required to decrypt the data, if any problems occur with your files.

## Session Validation

Magento Open Source allows you to validate session variables as a protective measure against possible session fixation attacks, or attempts to poison or hijack user sessions. The Session Validation Settings determine how session variables are validated during each store visit, and if the session ID is included in the URL of the store.

For technical information, see [Use Redis for session storage](#) in the developer documentation.

Setting Name	Value	Use system value
Validate REMOTE_ADDR	No	<input checked="" type="checkbox"/>
Validate HTTP_VIA	No	<input checked="" type="checkbox"/>
Validate HTTP_X_FORWARDED_FOR	No	<input checked="" type="checkbox"/>
Validate HTTP_USER_AGENT	No	<input checked="" type="checkbox"/>
Use SID on Storefront	Yes	<input checked="" type="checkbox"/>

*Session Validation Settings*

The validation checks to see that visitors are who they say they are by comparing the value in the validation variables against the session data that is already stored in `$_SESSION` data for the user. Validation fails if the information is not transmitted as expected, and the corresponding variable is empty. Depending on the session validation settings, if a session variable fails the validation process, the client session immediately terminates.

Enabling all of the validation variables can help prevent attacks, but might also impact the performance of the server. By default, all session variable validation is disabled. We recommend that you experiment with the settings to find the best combination for your Magento installation. Activating all of the validation variables might prove to be unduly restrictive, and prevent access to customers who have Internet connections that pass through a proxy server, or that originate from behind a firewall. To learn more about session variables and their use, see the system administration documentation for your Linux system.

**To configure the Session Validation Settings:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand ☺ the **Session Validation Settings** section. Then, do the following:
  - a. To verify that the IP address of a request matches what is stored in the `$_SESSION` variable, set **Validate REMOTE\_ADDR** to “Yes.”
  - b. To verify that the proxy address of an incoming request matches what is stored in the `$_SESSION` variable, set **Validate HTTP\_VIA** to “Yes.”
  - c. To verify that the forwarded-for address of a request matches what is stored in the `$_SESSION` variable, set **Validate HTTP\_X\_FORWARDED\_FOR** to “Yes.”
  - d. To verify that the browser or device that is used to access the store during a session matches what is stored in the `$_SESSION` variable, set **Validate HTTP\_USER\_AGENT** to “Yes.”
  - e. If you want a user to stay logged in while switching between stores, set **Use SID on Frontend** to “Yes.”

If including SID with analytics, you must configure your analytics software to filter the SID from URLs, so the page visit counts are correct.

4. When complete, tap **Save Config**.

## Browser Capabilities Detection

As is true of most websites and applications on the Internet, Magento requires that the visitor's browser allow both cookies and JavaScript for full operations. However, occasionally a user's browser is set to the highest privacy setting that prevents both cookies and JavaScript. Your store can be configured to test the capabilities of each visitor's browser, and to display a notice if the settings need to be changed.

- If the browser's privacy settings disallow cookies, you can configure the system to automatically redirect them to the [Enable Cookies](#) page, which explains how to make the recommended settings with most browsers.
- If the browser's privacy settings disallow JavaScript, you can configure the system to display the following message above the header of every page:

For technical information, see [Supported browsers](#) in the developer documentation.

### To configure browser capabilities detection:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand ☺ the **Browser Capabilities Detection** section, and do the following:
  - a. To display instructions that explain how to configure the browser to allow cookies, set **Redirect to CMS-page if Cookies are Disabled** to "Yes."
  - b. To display a banner above the header when JavaScript is disabled in the user's browser, set **Show Notice if JavaScript is Disabled** to "Yes."

Browser Capabilities Detection		
Redirect to CMS-page if Cookies are Disabled <small>[store view]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Show Notice if JavaScript is Disabled <small>[store view]</small>	Yes	<input checked="" type="checkbox"/> Use system value
Show Notice if Local Storage is Disabled <small>[store view]</small>	No	<input checked="" type="checkbox"/> Use system value

*Browser Capabilities Detection*

4. When complete, tap **Save Config**.





## CHAPTER 92:

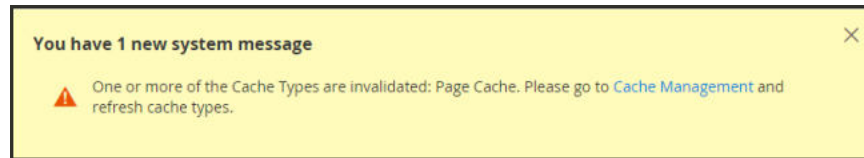
# Tools

In this section of the guide, you will learn how to perform routine index and cache management operations, back up the system, and use tools that help our Support team troubleshoot and resolve issues.

- [Cache Management](#)
- [Index Management](#)
- [Backups](#)
- [Cron \(Scheduled Backups\)](#)
- [Developer Tools](#)
- [Alternate Media Storage](#)
- [Web Setup Wizard](#)

## Cache Management

Magento's cache management system is an easy way to improve the performance of your site. Whenever a cache needs to be refreshed, a notice appears at the top of the workspace to guide you through the process. Follow the link to Cache Management, and refresh the invalid caches.

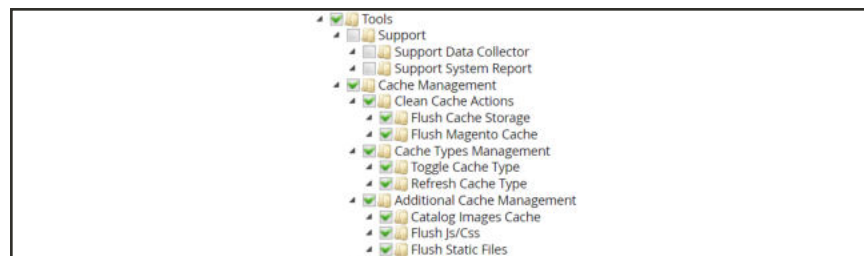


### *Update Cache Message*

The Cache Management page shows the status of each primary cache and its associated tag. The large buttons in the upper-right corner can be used to flush the Magento Cache, or the all-inclusive Cache Storage. At the bottom of the page there are additional buttons to flush the catalog product images cache and JavaScript/CSS cache.

After clearing a cache, always refresh your browser to make sure that you can see the most recent files. Clearing the Magento cache does not clear your web browser cache. You may need to clear the browser cache to see updated content.

Access to specific cache maintenance actions can be assigned to users by **role**, including options to view, toggle, and flush caches. Magento recommends only enabling flush actions to administrator level users. Providing access to all Cache Management features can impact your storefront's performance.



### *Cache Management Role Resources*

For technical information, see [Magento cache overview](#) in the developer documentation.

One or more of the Cache Types are invalidated: Page Cache. Please go to [Cache Management](#) and refresh cache types.

### Cache Management

Flush Cache Storage Flush Magento Cache

Refresh  13 records found

Cache Type	Description	Tag	Status
<input type="checkbox"/> Configuration	Various XML configurations that were collected across modules and merged	CONFIG	ENABLED
<input type="checkbox"/> Layouts	Layout building instructions	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input type="checkbox"/> Blocks HTML output	Page blocks HTML	BLOCK_HTML	ENABLED
<input type="checkbox"/> Collections Data	Collection data files	COLLECTION_DATA	ENABLED
<input type="checkbox"/> Reflection Data	API interfaces reflection data	REFLECTION	ENABLED
<input type="checkbox"/> Database DDL operations	Results of DDL queries, such as describing tables or indexes	DB_DDL	ENABLED
<input type="checkbox"/> Compiled Config	Compilation configuration	COMPILED_CONFIG	ENABLED
<input type="checkbox"/> EAV types and attributes	Entity types declaration cache	EAV	ENABLED
<input type="checkbox"/> Customer Notification	Customer Notification	CUSTOMER_NOTIFICATION	ENABLED
<input type="checkbox"/> Integrations Configuration	Integration configuration file	INTEGRATION	ENABLED
<input type="checkbox"/> Integrations API Configuration	Integrations API configuration file	INTEGRATION_API_CONFIG	ENABLED
<input type="checkbox"/> Page Cache	Full page caching	FPC	INVALIDATED
<input type="checkbox"/> Web Services Configuration	REST and SOAP configurations, generated WSDL file	WEBSERVICE	ENABLED
<input type="checkbox"/> Translations	Translation files	TRANSLATE	ENABLED

Cache Management



## Best practices for caching

Reindexing and caching have different purposes in Magento. **Indexes** track database information for increased search performance, faster data retrieval for storefronts, and more. Caches save loaded data, images, formats, and the like for increased performance loading and accessing the storefront.

- Always flush the cache after installing extensions/modules. You can install one or more extensions, then flush the cache.
- Flush the cache after installing Magento Commerce. For fresh installs, you should also reindex.
- Flush the cache after upgrading from one version of Open Source or Commerce to another.
- When flushing caches, consider the type of cache and scheduling the flushing during non-peak times. For example, pick a time when few customers may access the site such as late night or early morning. Clearing some cache types during peak times cause result in a high load on the Admin and may result in a down site until completed.
- When **reindexing**, you do not need to also perform a flush cache.

## To refresh specific caches:

1. Do one of the following:
  - Click the **Cache Management** link in the message above the workspace.
  - On the Admin sidebar, tap **System**. Then under Tools, choose **Cache Management**.
2. For each cache to be refreshed, mark the checkbox at the beginning of the row.
3. Set **Actions** to “Refresh,” and tap **Submit**.

## To perform mass actions:

1. To select a group of caches, set **Mass Actions** to one of the following:
  - Select All
  - Select Visible
2. Mark the checkbox of each cache to be targeted by the action.
3. Set **Actions** to “Refresh,” and tap **Submit**.

### To flush the product image cache:

1. From the Cache Storage Management page, under Additional Cache Management, click **Flush Catalog Images Cache** to clear pre-generated product image files.

The message, “Image cache was cleaned” appears at the top of the workspace.

2. Make sure to also clear the cache of your browser.

### To flush the JavaScript/CSS cache:

1. From the Cache Storage Management page, under Additional Cache Management, click **Flush JavaScript/CSS Cache** to clear any JavaScript and CSS files that have been merged into a single file.

The message, “The JavaScript/CSS cache has been cleaned” appears at the top of the workspace.

2. Make sure to also clear the cache of your browser.

### To flush using the Command Line:

Magento provides additional flush cache options using the command line. These options may require developer support to complete. For complete details and command options, see [Magento cache overview](#) and [Manage the cache](#).

## Control Descriptions

CONTROL	DESCRIPTION
Mass Actions	Marks the checkbox of multiple caches. Options include: <ul style="list-style-type: none"> <li>Select All            Marks the checkbox of all caches.</li> <li>Unselect All        Clears the checkbox of all caches.</li> <li>Select Visible       Marks the checkbox of all visible caches.</li> <li>Unselect Visible    Clears the checkbox of all visible caches.</li> </ul>
Actions	Determines the action to be applied to all selected caches. Options include: <ul style="list-style-type: none"> <li>Enable                Enables all selected caches.</li> <li>Disable               Disables all selected caches.</li> <li>Refresh               Refreshes all selected caches.</li> </ul>
<input type="button" value="Submit"/>	Applies the action to all selected caches.

## Button Descriptions

BUTTON	DESCRIPTION
<input type="button" value="Flush Magento Cache"/>	Removes all items in the default Magento cache ( <code>var/cache</code> ), according to their associated Magento tags.
<input type="button" value="Flush Cache Storage"/>	Removes all items from the cache, regardless of Magento tag. If your system uses an alternate cache location, any cached files used by other applications are removed in the process.
<input type="button" value="Flush Catalog Images Cache"/>	Removes all automatically resized and watermarked catalog images that are stored at: <code>media/catalog/product/cache</code> . If recently uploaded images aren't reflected in the catalog, try flushing the catalog and refreshing your browser.
<input type="button" value="Flush JavaScript/CSS Cache"/>	Removes the merged copy of JavaScript and CSS files from the cache. If recent changes to the style sheet or JavaScript aren't reflected in the store, try flushing the JavaScript/CSS cache and refreshing your browser.
<input type="button" value="Flush Static Files Cache"/>	Removes preprocessed view files and static files.

### Cache Descriptions

CACHE	DESCRIPTION
Configuration	<p>Various XML configurations that were collected across modules and merged. Associated Tag: CONFIG</p> <p>System: config.xml local.xml</p> <p>Module: config.xml</p>
Layouts	<p>Layout building instructions.</p> <p>Associated Tag: LAYOUT_GENERAL_CACHE_TAG</p>
Blocks HTML output	Page blocks HTML. Associated Tag: BLOCK_HTML
Collections Data	Collection data files. Associated Tag: COLLECTION_DATA
Reflection Data	Clears API interface reflection data, that is typically generated during runtime.
Database DDL operations	<p>Results of DDL queries, such as describing tables or indexes.</p> <p>Associated Tag: DB_DDL</p>
Compiled Config	<p>Results of code compilation.</p> <p>Associated Tag: COMPILED_CONFIG</p>
EAV types and attributes	Entity types declaration cache. Associated Tag: EAV
Customer Notification	Temporary notifications that appear in the user interface.
Integrations Configuration	Integration configuration file. Associated Tag: INTEGRATION
Integrations API Configuration	<p>Integrations API configuration file.</p> <p>Associated Tag: INTEGRATION_API_CONFIG</p>
Page Cache	Full page caching. Associated Tag: FPC
Translations	Translation files. Associated Tag: TRANSLATE
Web Services Configuration	<p>REST and SOAP configurations, generated WSDL file.</p> <p>Associated Tag: WEBSERVICE</p>

### Cache Management Role Resources

#### RESOURCE

[Cache Management](#)

- Clean Cache Actions
- Flush Cache Storage

## Cache Management Role Resources (cont.)

### RESOURCE

Flush Magento Cache

Cache Type Management

Toggle Cache Type

Refresh Cache Type

Additional Cache Management

Catalog Images Cache

Flush Js/Css

Flush Static Files

## Full-Page Cache

Magento Open Source uses full-page caching on the server to quickly display category, product, and CMS pages. Full-page caching improves response time and reduces the load on the server. Without caching, each page might need to run blocks of code and retrieve information from the database. However, with full-page caching enabled, a fully-generated page can be read directly from the cache.


We recommend Varnish to be used only in a production environment.

Cached content can be used to process the requests from similar types of visits. As a result, pages shown to a casual visitor might differ from those shown to a customer. For the purposes of caching, each visit is one of three types:

Non-sessioned	During a non-sessioned visit, a shopper views pages, but does not interact with the store. The system caches the content of each page viewed, and serves them to other non-sessioned shoppers.
Sessioned	During a sessioned visit, shoppers who interact with the store—through activities such as comparing products or adding products to the shopping cart—are assigned a session ID. Cached pages that are generated during the session are used only by that shopper during the session.
Customer	Customer sessions are created for those who have registered for an account with your store and shop while logged in to their accounts. During the session, customers can be presented with special offers, promotions, and prices that are based on the customer group to which they are assigned.

For technical information, see [Configure and Use Varnish](#) and [Use Redis for the Magento page and default cache](#) in the developer documentation.

### To configure the full-page cache:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand  the **Full Page Cache** section.



**Full Page Cache**

Caching Application [global] Built-in Cache  Use system value

TTL for public content [global] 86400  Use system value

Public content cache lifetime in seconds. If field is empty default value 86400 will be saved.

### *Full Page Cache*

4. Set **Caching Application** to one of the following:
  - Built-in Application
  - Varnish Caching
5. To set the time-out for the page cache, enter the **TTL for public content**. (The default value is 86400)
6. If using Varnish, complete the **Varnish Configuration** section as follows:
  - a. In the **Access list** field, enter the IP addresses that can purge the Varnish configuration to generate a config file. Separate multiple entries with a comma. The default value is “localhost.”
  - b. In the **Backend host** field, enter the IP address of the backend host that generates config files. The default value is “localhost.”
  - c. In the **Backend port** field, identify the backend port that is used to generate config files. The default value is: “8080.”
  - d. To export the configuration as a varnish.vcl file, tap the button for the version of Varnish that you use.
    - Export VCL for Varnish 3
    - Export VCL for Varnish 4

**Varnish Configuration**

**Access list** [global]  
 IPs access list separated with ',' that can purge Varnish configuration for config file generation. If field is empty default value localhost will be saved.

**Backend host** [global]  
 Specify backend host for config file generation. If field is empty default value localhost will be saved.

**Backend port** [global]  
 Specify backend port for config file generation. If field is empty default value 8080 will be saved.

**Grace period** [global]  
 Specify grace period in seconds for config file generation. If field is empty default value 300 will be saved. This grace period will be used to serve cached content when the server is healthy. If the server is not healthy, cached content will be served for 3 days before failing.

**Export Configuration** [global]  
 [global] **Export VCL for Varnish 4**  
 [global] **Export VCL for Varnish 5**

### *Varnish Configuration*

7. When complete, tap **Save Config**.

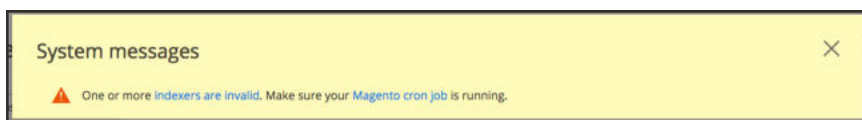
## Index Management

Magento reindexes automatically whenever one or more items change. Actions that trigger reindexing include price changes, creating catalog or shopping cart price rules, adding new categories, and so on. To optimize performance, Magento accumulates data into special tables using indexers. As the data changes, the indexed tables must be updated—or reindexed. Magento reindexes as a background process, and your store remains accessible during the processes.

Reindexing data speeds up processing, and reduces the time the customer has to wait. For example, if you change the price of an item from \$4.99 to \$3.99, Magento reindexes the data to show the price change in the 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 might take longer than the customer is willing to wait.

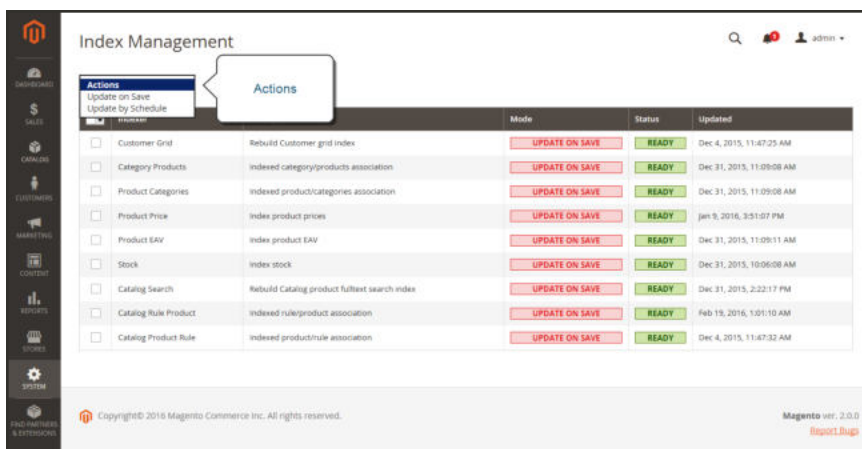
The indexers can be set to either update on save or on schedule. All indexes can use either option, except Customer Grid which only supports on save. When indexing on save, Magento starts a reindex on save actions. The Index Management page will update and flush the reindex message within a minute or two. When reindexing on a schedule, a reindex runs according to a schedule as a cron job. A system message appears if a **cron job** is not available to update any indexers that become invalid. Your store remains accessible during reindex processes.

When you need to reindex, a notification appears at the top of the page. The index and message clears based on the reindex mode and potential actions you take.



Reindex notification

For technical information, see [Indexing overview](#) in DevDocs developer documentation.



Index Management



- Index Management has a slightly different presentation for flat product catalogs.
- To avoid problems when multiple Admin users update objects that trigger automatic reindexing, we recommend that you set all indexers to run on schedule as **cron jobs**. Otherwise, every time an object is saved, any objects with interdependencies might cause a deadlock. Symptoms of a deadlock include high CPU usage and MySQL errors. As a best practice, we recommend that you use scheduled indexing.

By default, admin actions, such as reindexing, are logged by the system and can be viewed in the Action Logs Report. Action logging can be configured in the Admin Actions Logging in your store's advanced admin settings.

### Best practices for reindexing

Reindexing and caching have different purposes in Magento. Indexes track database information for increased search performance, faster data retrieval for storefronts, and more. **Caches** save loaded data, images, formats, and the like for increased performance loading and accessing the storefront.

- Typically, you want to reindex when updating data in Magento.
- If you have a large store or multiple stores, you may want to set indexers like category and products to scheduled cron jobs due to potential reindex looping. You may want to set the reindex on a schedule during non-peak hours.
- When reindexing, you do not need to also perform a flush cache.
- For fresh Magento installations, you need to flush the cache and reindex.
- Flushing caches and reindexing does not flush your computer's web browser cache. We recommend also flushing the browser cache after completing updates to your storefront.

### To change the index mode:

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Mark the checkbox of each indexer that you want to change.
3. Set **Actions** to one of the following:
  - Update on Save
  - Update by Schedule

**Important:** Customer Grid can only be reindexed using "Update on Save". This index does not support "Update by Schedule".

4. Tap **Submit** to apply the change to each selected indexer.

### Column Descriptions

COLUMN	DESCRIPTION
Indexer	The name of the indexer.
Description	A description of the indexer.
Mode	Indicates the current update mode for each indexer. Options:

**Column Descriptions (cont.)**

COLUMN	DESCRIPTION
Update on Save	The index is set to update whenever an entity change is saved. These entities include products, categories, and customers. When the save action completes, a series of steps begin catching the changes and updating the index. The Index Management page will update and flush the reindex message within a minute or two.
Update on Schedule	The index is set to update on schedule according to a <b>cron jobs</b> . The cron job includes the schedule interval for reindexing, writing updates to the index when run.
Status	Displays one of the following: <ul style="list-style-type: none"> <li>Ready: The index is up-to-date.</li> <li>Scheduled: Reindexing is scheduled to take place.</li> <li>Running: Reindexing is currently running.</li> <li>Reindex Required: A change has been made that requires reindexing, but the indexers cannot be updated automatically. Check to see if <b>cron</b> is available and configured correctly.</li> </ul>
Updated	Indicates the date and time an index was last updated.

**To reindex using the Command Line:**

Magento provides additional reindex options using the command line. These options may require developer support to complete. For complete details and command options, see **Reindex** in **Manage the indexers**. The DevDocs PHP Developer Guide also includes an **Indexing section**.

# Index Trigger Events

## Reindexing Triggers

INDEX TYPE	REINDEXING EVENT
Product Prices	Add customer group Change configuration settings
Flat catalog <sup>1</sup> product data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)
Flat catalog category data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)
Catalog category/product index	Add, edit, or delete products (single, mass, and import) Change product-to-category relations Add, edit, or delete categories Add or delete stores Delete store groups Delete websites
Catalog search index	Add, edit, or delete products (single, mass, and import) Add or delete stores Delete store groups Delete websites
Stock status index	Change inventory configuration settings.
Category permissions index	Add store, add store group, add or delete or update attribute (for searching and filtering)

<sup>1</sup> The flat product and category indexers also influence how catalog and shopping cart price rules are indexed. If you have a large number of SKUs (about 500,000 or more), you will notice a dramatic improvement in indexing time for price rules. To take advantage of this improvement, you must enable [Use Flat Catalog Product](#).

## Index Actions and Controls

### Index Actions

ACTION	RESULT	TO CONTROL
Creating a new store, new customer group, or any action listed in “Actions that Cause a Full Reindex.”	Full reindex	Full reindexing is performed on the schedule determined by your Magento cron job.
Bulk loading of items in the following ways: <ul style="list-style-type: none"> <li>• Magento import/export</li> <li>• Direct SQL query</li> <li>• Any other method that directly adds, changes, or deletes data.</li> </ul>	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.
Changing scope (for example, from global to website)	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.

## Events that Trigger Full Reindexing

### Full Reindex Triggers

INDEXER	EVENT
Catalog Category Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following: <ul style="list-style-type: none"> <li>• Searchable or visible in advanced search</li> <li>• Filterable</li> <li>• Filterable in search</li> <li>• Used for sorting</li> </ul> Change an existing attribute to be any of the preceding. Enable flat category storefront options
Catalog Product Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following:

### Full Reindex Triggers (cont.)

INDEXER	EVENT						
	<ul style="list-style-type: none"> <li>• Searchable or visible in advanced search</li> <li>• Filterable</li> <li>• Filterable in search</li> <li>• Used for sorting</li> </ul> <p>Change an existing attribute to be any of the preceding.                      Enable flat category storefront options</p>						
Stock status indexer	<p>When the following Catalog Inventory options change in the system configuration:</p> <table border="0"> <tr> <td>Stock Options</td> <td>Display Out of Stock Products</td> </tr> <tr> <td>Product Stock Options</td> <td>Manage Stock</td> </tr> </table>	Stock Options	Display Out of Stock Products	Product Stock Options	Manage Stock		
Stock Options	Display Out of Stock Products						
Product Stock Options	Manage Stock						
Price Indexer	<p>Adding a new customer group.</p> <p>When any of the following Catalog Inventory options change in the system configuration:</p> <table border="0"> <tr> <td>Stock Options</td> <td>Display Out of Stock Products</td> </tr> <tr> <td>Product Stock Options</td> <td>Manage Stock</td> </tr> <tr> <td>Price</td> <td>Catalog Price Scope</td> </tr> </table>	Stock Options	Display Out of Stock Products	Product Stock Options	Manage Stock	Price	Catalog Price Scope
Stock Options	Display Out of Stock Products						
Product Stock Options	Manage Stock						
Price	Catalog Price Scope						
Category or Product Indexer	<p>Create or delete a store view                      Delete a store                      Delete a website</p>						

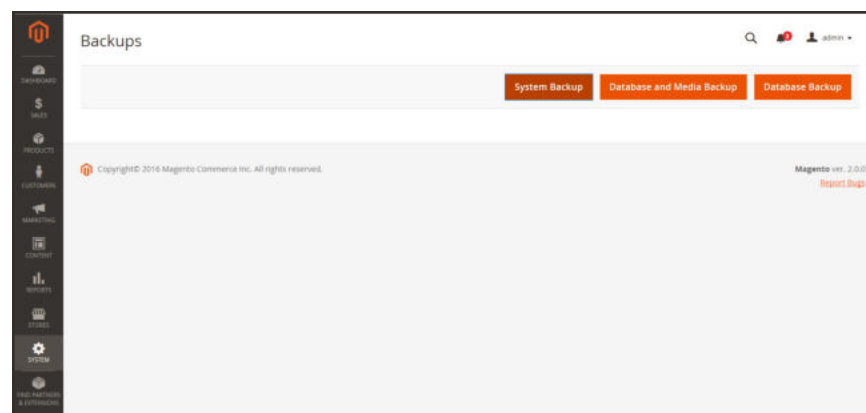
## Backups

Magento Open Source gives you the ability to backup different parts of the system—such as the file system, database, and media files—and to roll back automatically. A record for each backup appears in the grid on the Backups page. Deleting a record from the list deletes the archived file as well. Database backup files are compressed using the .GZ format. For the system backups and database and media backups, the .TGZ format is used. As a best practice, you should restrict access to backup tools, and backup before installing extensions and updates.

- Restrict access to backup tools.** Access to the Backups and roll back management tool can be restricted by configuring user permissions for backup and roll back resources. To restrict access, leave the corresponding checkbox unselected. If you need to grant access to roll back resources, you must grant access to backup resources as well.
- backup before installing extensions and updates.** Always perform a backup before you install an extension or update. [Extensions Manager](#) and [Module Manager](#) include a backup option that you can use before installing an extension or upgrading to a new release.

**Disabled feature:** Magento backup is disabled by default. To enable may require developer assistance. See [Magento DevDocs](#) for the command to enable backups: [Back up and roll back the file system, media, and database](#).

**Deprecation Notice!** Magento backup features are deprecated as of v2.3.0. We recommend that all merchants investigate additional backup technologies and binary backup tools (such as Percona XtraBackup).



*Backups*

### To create a backup:

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Backups**.
2. In the upper-right corner, tap the button for the type of backup you want to create:

**System Backup**      Creates a complete backup of the database and the file system. During the process, you can choose to include the media folder in the backup.

**Database and Media Backup**      Creates a backup of the database and the media folder.

**Database Backup**      Creates a backup of the database.

3. To put the store into maintenance mode during the backup, mark the checkbox. When the backup is complete, maintenance mode is turned off automatically.
4. For a system backup, mark the **Include Media folder to System Backup** checkbox if you want to include the media folder. Then when prompted, confirm the action.

### To schedule backups

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand ☺ the **Scheduled Backup Settings** section, and do the following:
4. When complete, tap **Save Config**.



## Cron (Scheduled Tasks)

Magento performs some operations on schedule by periodically running a script. You can control the execution and scheduling of Magento cron jobs from the Admin. Store operations that run according to a cron schedule include:


- [Email](#)
- [Catalog Price Rules](#)
- [Newsletters](#)
- [XML Sitemap Generation](#)
- [Currency Rate Updates](#)

In addition, you can configure the following to run according to a cron schedule:

- Order System Grid Updates and Reindexing
- Pending Payment Lifetime

Make sure that the [base URLs](#) for the store are set correctly, so the URLs that are generated during cron operations are correct. For technical information, see: [Set up cron jobs](#).

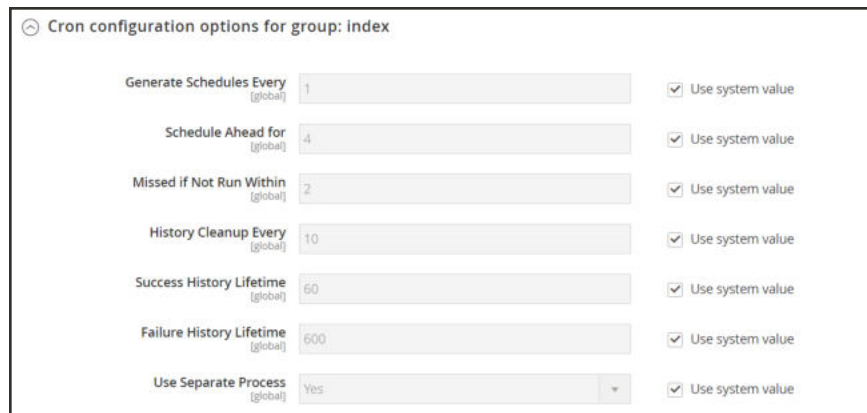
### To configure cron:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand  the **Cron** section.



*Cron (Scheduled Tasks)*

4. Then, complete the following settings for the **Index** and **Default** groups. The settings are the same in each section.
- Generate Schedules Every
  - Schedule Ahead for
  - Missed if not Run Within
  - History Cleanup Every
  - Success History Lifetime
  - Failure History Lifetime
  - Use Separate Process



The screenshot shows a configuration panel titled "Cron configuration options for group: index". It contains seven rows of settings, each with a label, a value field, and a checkbox for "Use system value".

Setting	Value	Use system value
Generate Schedules Every [global]	1	<input checked="" type="checkbox"/>
Schedule Ahead for [global]	4	<input checked="" type="checkbox"/>
Missed if Not Run Within [global]	2	<input checked="" type="checkbox"/>
History Cleanup Every [global]	10	<input checked="" type="checkbox"/>
Success History Lifetime [global]	60	<input checked="" type="checkbox"/>
Failure History Lifetime [global]	600	<input checked="" type="checkbox"/>
Use Separate Process [global]	Yes	<input checked="" type="checkbox"/>

*Cron Configuration for Group: Index*

5. When complete, tap **Save Config.**

## Developer Tools

Use the Advanced Developer tools to determine the compilation mode during frontend development, create a whitelist of IP addresses, display template path hints, and make spot changes to text in the interface of the storefront and Admin.

- [Amazon Logs](#)
- [Frontend Development Workflow](#)
- [Using Static File Signatures](#)
- [File Optimization](#)
- [Developer Client Restrictions](#)
- [Template Path Hints](#)
- [Translate Inline](#)


## Amazon Pay Logs

The Amazon Pay extension collects and provides viewable and downloadable logs for Client and IPN tracked access and actions. Logs generate if you have the logging feature enabled in Amazon Pay store configuration. For details, see the [Developer Options](#) section for Amazon Pay configurations.

Amazon Pay logs the following information:

Client	Logs all API calls and responses.
INP	Logs all Instant Payment Notifications that are sent by Amazon.

### To display and download Amazon Logs:

1. On the Admin sidebar, choose **Stores**. Under Settings, choose **Configuration**.
2. Expand  the **Advanced** section, then expand **Developer Options**.
3. If logs generated, select a link to download to view Client and IPN logs.

If logs are not available or have not been generated, a message displays "No logs are currently available."

⊖ **Developer Options**

**Logging**  
[global]

**Allowed IPs**  
[website]

Comma separated. The "Login with Amazon" and "Amazon Pay" buttons will *only* be rendered for clients having the above IPs. If the field is empty, the buttons will be visible to all clients.

**Developer Logs** No logs are currently available.

*Amazon Pay Developer Options*

## Frontend Development Workflow

The Frontend Development Workflow type determines if Less compilation takes place on the client- or server side during development. Less is an extension of CSS that has additional features and conventions, and that produces streamlined code. Client-side Less compilation is recommended for theme development. Server-side compilation is the default mode. The development workflow options are not available for stores in production mode.

For technical information, see [Client-side LESS compilation vs. server-side](#) in the developer documentation.

The Frontend Development Workflow configuration is available in **Developer Mode** only.



### *Front-end Development Workflow*

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Front-end Development Workflow** section.
4. Set **Workflow Type** to one of the following:

Client side less compilation      Compilation takes place in the browser using the native less.js library.

Server side less compilation      Compilation takes place on the server using the Less PHP library. This is the default mode for production.

5. When complete, tap **Save Config**.

## Using Static File Signatures

Adding a digital signature to the URL of static files makes it possible for browsers to detect when a newer version of the file is available. Static files that can be tracked with digital signatures include JavaScript, CSS, images, and fonts. The signature is appended to the path directly after the base URL. If a file's signature differs from what is currently stored in the browser's cache, then the newer version of the file is used.

For technical information, see [Static content signing](#) in the developer documentation.

The Static File Settings configuration is available only when working in **developer mode**.



*Static File Settings*

### To enable signed static files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Static Files Settings** section.
4. Set **Sign Static Files** to “Yes.”
5. When complete, tap **Save Config**.

## Optimizing Resource Files

The time it takes to load resource files can be reduced by merging and bundling files, and by minimizing code.

- Merging combines separate files of the same type into a single file.
- Bundling is a technique that groups separate files in order to reduce the number of HTTP requests that are required to load a page.
- Minification removes spaces, line breaks, and comments, but does not affect the functionality of the code. Because minimized files cannot be edited, the process should be applied only when you are ready to go into production.

By default, Magento does not merge, bundle, or minimize files, and the project developer should determine which file optimization methods should be used.

For technical information, see [Magento Optimization Guide](#) in the developer documentation.

CSS and JavaScript files can be optimized in [Developer Mode](#) only.

FILE TYPE	SUPPORTED OPERATIONS
CSS Files	<ul style="list-style-type: none"><li>• Merge</li><li>• Minify</li></ul>
JavaScript Files	<ul style="list-style-type: none"><li>• Merge</li><li>• Bundle</li><li>• Minify</li></ul>
Template Files	<ul style="list-style-type: none"><li>• Minify</li></ul>

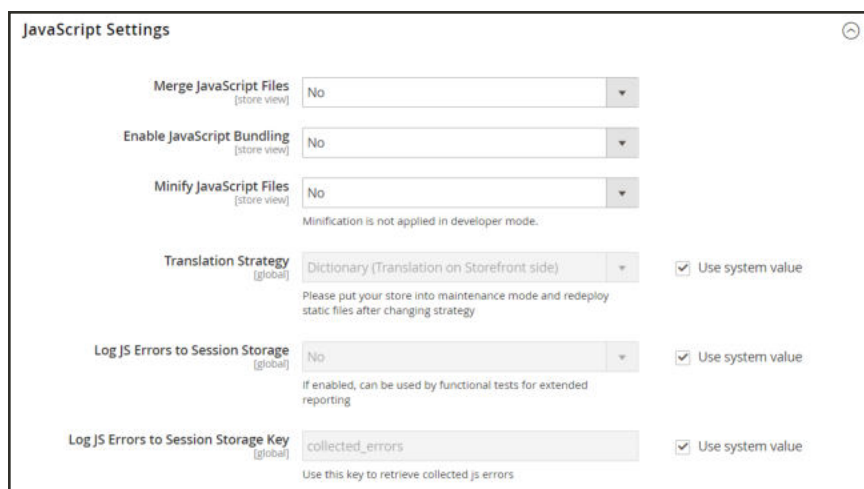
### To optimize resource files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. To optimize CSS files, do the following:
  - a. Expand ☺ the **CSS Settings** section. Then, do the following:
  - b. Set **Merge CSS Files** to “Yes.”
  - c. Set **Minify CSS Files** to “Yes.”



*CSS Settings*

4. To optimize JavaScript files, do the following:
  - a. Expand ☺ the **JavaScript Settings** section. Then, do the following:
  - b. Set **Merge JavaScript Files** to “Yes.”
  - c. Set **Minify JavaScript Files** to “Yes.”

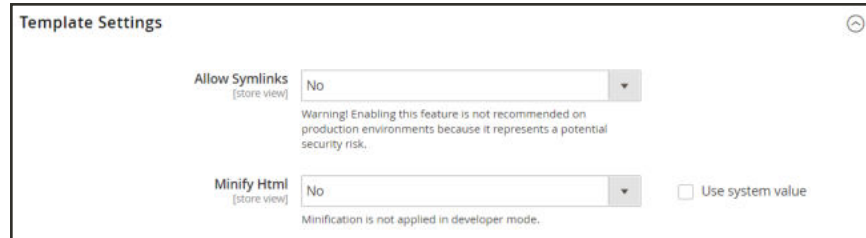


*JavaScript Settings*

5. To minify PHTML template files, do the following:



- a. Expand ☺ the **Template Settings** section.
- b. Set **Minify Html** to “Yes.”



The screenshot shows the 'Template Settings' section of a configuration page. It contains two settings:

- Allow Symlinks** (store view): A dropdown menu currently set to 'No'. Below it is a warning: 'Warning! Enabling this feature is not recommended on production environments because it represents a potential security risk.'
- Minify Html** (store view): A dropdown menu currently set to 'No'. To its right is a checkbox labeled 'Use system value' which is unchecked. Below it is a note: 'Minification is not applied in developer mode.'

*Template Settings*

6. When complete, tap **Save Config**.

## Developer Client Restrictions

Before using a tool such as [Template Path Hints](#), make sure to add your IP address to the Developer Client Restrictions whitelist to avoid disrupting the shopping experience of customers in the store. If you don't know your IP address, you can search for it online.

Developer Client Restrictions can be set in [Developer Mode](#) only.

For technical information, see [Custom whitelist VCL](#) in the developer documentation.

### Add Your IP Address to the Whitelist

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☺ the **Developer Client Restrictions** section.

### *Developer Client Restrictions*

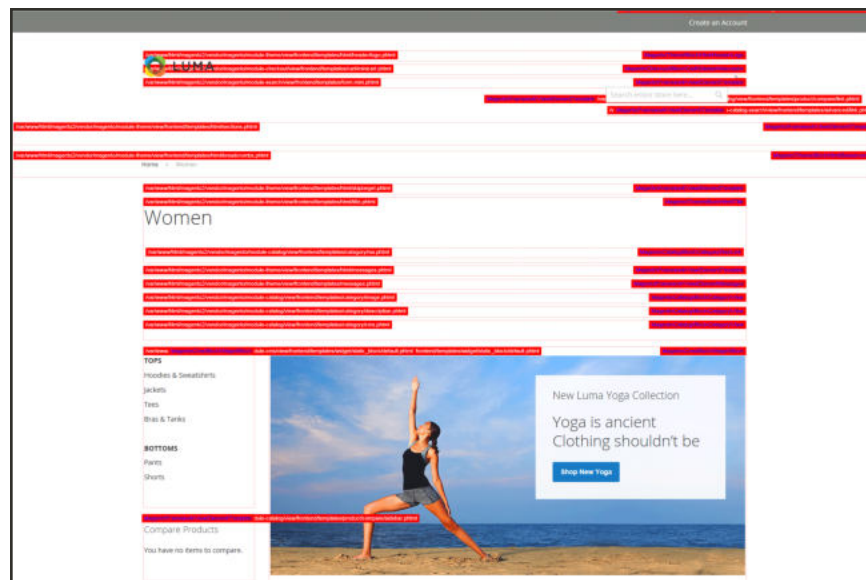
4. In the **Allow IPs** field, enter your IP address. If access is needed from multiple IP addresses, separate each with a comma.
5. When complete, tap **Save Config**.
6. When prompted, refresh any invalid caches.

## Template Path Hints

Template Path Hints are a diagnostic tool that adds notation with the path to each template that is used on the page. Template path hints can be enabled for either the storefront or the Admin.

Template Path Hints can be edited in **Developer Mode** only.

For technical information, see [Locate templates, layouts, and styles](#) in the developer documentation.



*Template Path Hints in Storefront*

### Step 1: Whitelist Your IP Address

Before using template path hints, add your IP address to the **whitelist**, so you won't interfere with customers who are shopping in the store. When you are finished, make sure to clear the Magento cache to remove all hints from the store.



*Developer Client Restrictions*

## Step 2: Enable Template Path Hints

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☺ the **Debug** section. Then, do the following:

### *Debug*

- a. To activate template path hints for the store, set **Enabled Template Path Hints for Storefront** to “Yes.”
  - b. To activate template path hints for the Admin, set **Enabled Template Path Hints for Admin** to “Yes.”
  - c. To include the names of blocks, set **Add Block Names to Hints** to “Yes.”
4. When complete, tap **Save Config**.
  5. When you are finished, return to the Admin to disable the hints and clear the cache.

## Step 3: Clear the Cache

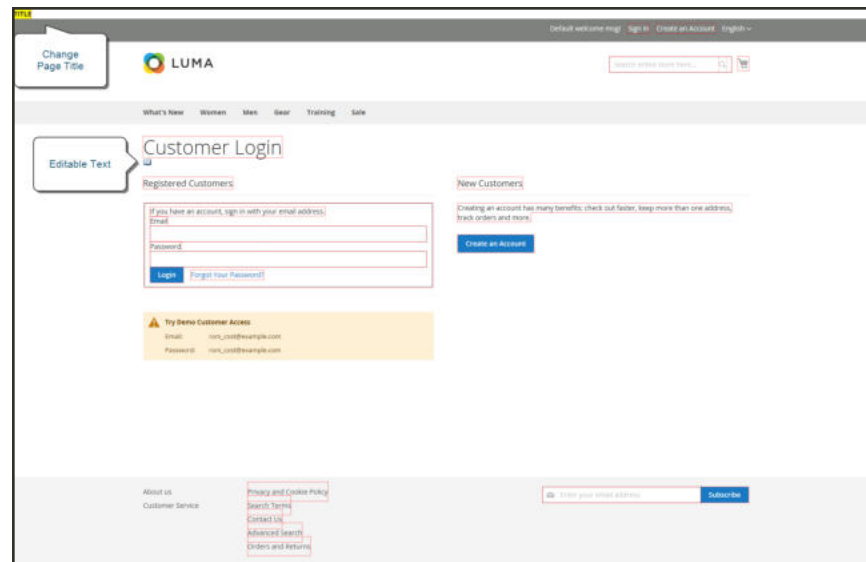
1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.
2. In the upper-right corner, tap **Flush Magento Cache**.

## Translate Inline

You can use the Translate Inline tool in **developer mode** to touch up text in the interface to reflect your voice and brand. When the Translate Inline mode is activated, any text on the page that can be edited is outlined in red. It's easy to edit field labels, messages, and other text that appears throughout the storefront and Admin. For example, many themes use terminology such as “My Account,” “My Wishlist,” and “My Dashboard,” to help customers find their way around. However, you might prefer to simply use the words “Account,” “Wishlist,” and “Dashboard.”

The Translate Inline tool is available only when working in **developer mode**.

For technical information, see [Translations overview](#) in the developer documentation.



*Translatable Text*

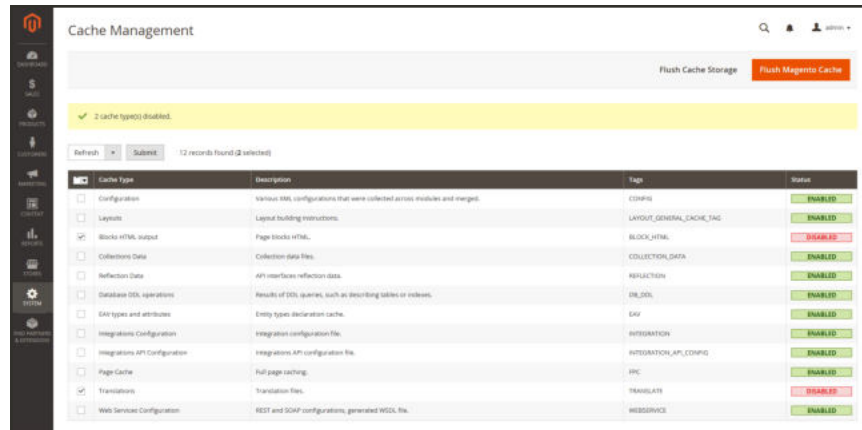
If your store is available in multiple languages, you can make fine adjustments to the translated text for the locale. On the server, interface text is maintained in a separate CSV file for each output block, and is organized by locale. As an alternate approach, rather than use the Translate Inline tool, you can also edit the CSV files directly on the server.

To use the Translate Inline tool, your browser must allow pop-ups.

### Step 1: Disable Output Caches

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.
2. Mark the following checkboxes:

- Blocks HTML output
  - Page Cache
  - Translations
3. Set the **Actions** control to “Disable.” Then, tap **Submit**.

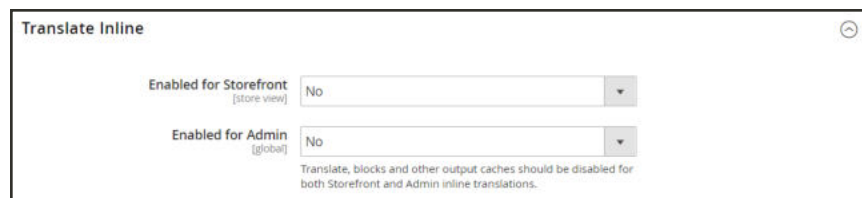


*Disable Output Caches*

### Step 2: Enable the Translate Inline Tool

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. To work with a specific store view, set the **Store View** that is to be updated.
3. In the panel on the left under **Advanced**, choose **Developer**.
4. Expand ☺ the **Translate Inline** section. Then if necessary, clear the **Use Website** checkbox.

The Enabled for Admin option is not available when editing a specific store view.



*Translate Inline*

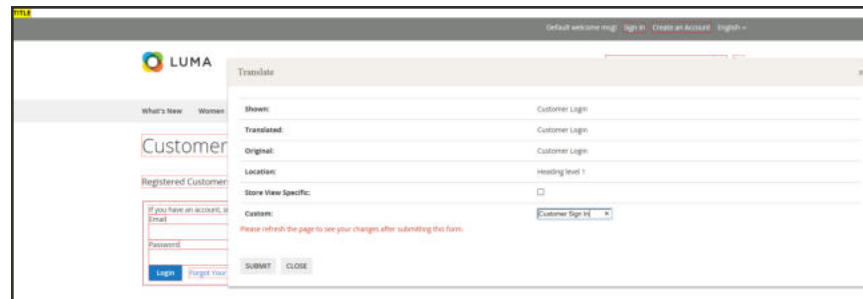
5. Set **Enabled for Storefront** to “Yes.”
6. When complete, tap **Save Config**.
7. When prompted, refresh the invalid caches, but leave the disabled caches as they are for now.

### Step 3: Update the Text

1. Open your storefront in a browser, and go to the page that you want to edit. If necessary, use the language chooser to change the store view.

Each string of text that can be translated is outlined in red. When you hover over any text box, a book icon (📖) appears.

2. Tap the book icon (📖) to open the Translate window. Then, do the following:
  - a. If the change is for the specific store view, mark the **Store View Specific** checkbox.
  - b. Enter the new **Custom** text.
  - c. When complete, tap **Submit**.

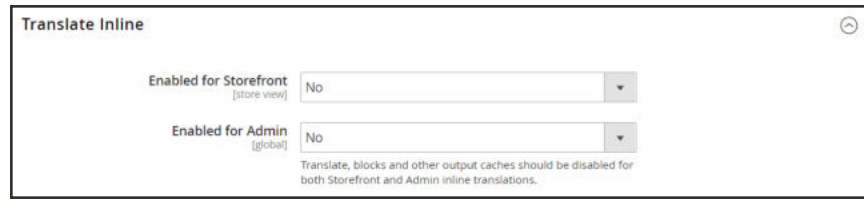


*Enter Custom Text*

3. To see your changes in the store, press the **F5** key to refresh the browser.
4. Repeat this process for any elements in the store to be changed.

### Step 4: Restore Original Settings

1. Return to the Admin of your store. On the Admin sidebar, tap **Store**. Then under **Settings**, choose **Configuration**.
  - a. Set **Store View** to the specific view that was edited.
  - b. In the panel on the left under **Advanced**, choose **Developer**.
  - c. Expand the **Translate Inline** section.

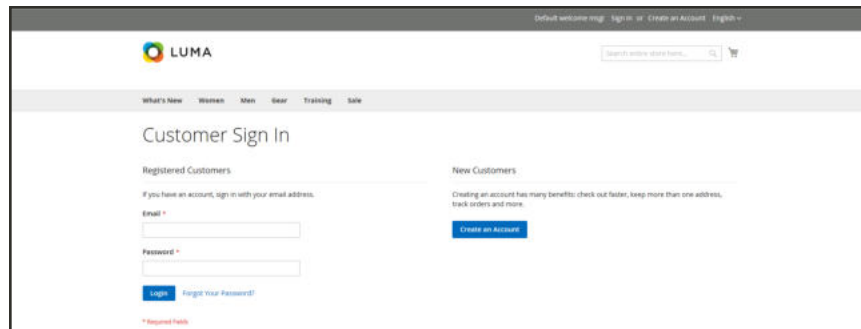


### *Translate Inline*

- a. Set **Enabled for Frontend** to “No.”
  - b. When complete, tap **Save Config**.
2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.
    - a. Mark the checkbox of the following output caches that were previously disabled:
      - Blocks HTML output
      - Page Cache
      - Translations
    - b. Set the **Actions** control to “Enable.” Then, tap **Submit**.
    - c. When prompted, refresh any invalid caches.

### **Step 5: Verify the Changes in Your Store**

Go to your storefront and examine each page that was updated to make sure the changes are correct. In this example, “Customer Login” was changed to “Customer Sign In.” If changes were made to a specific view, use the Language Chooser to switch to the correct view.



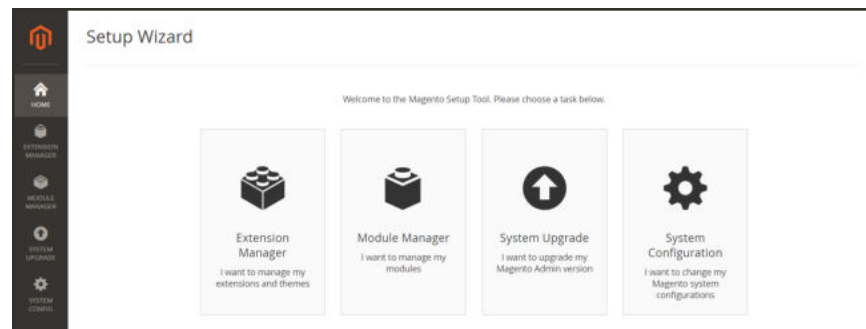
### *Customer Sign In*



## Setup Wizard

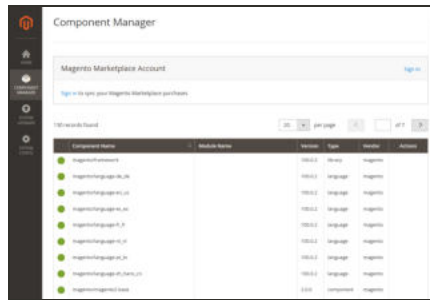
The Setup Wizard can be used to easily install and uninstall components, modules, and extensions, manage modules, upgrade your installation, and make changes to the Web setup of your installation.

**Important:** Always **flush the cache** after installing or upgrading Magento, or any extensions and modules.



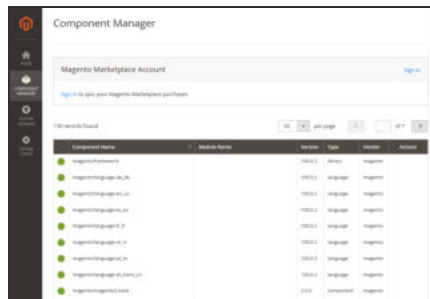
*Setup Wizard*

# Setup Tools



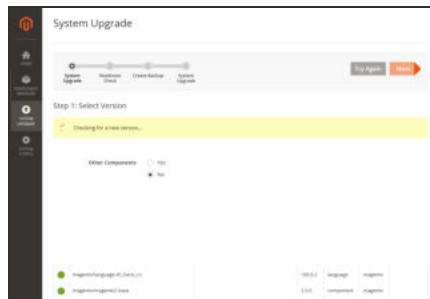
## Extension Manager

Extension Manager lists each component that is currently installed, and can be used to synchronize any extensions you have purchased from Magento Marketplace with your system.



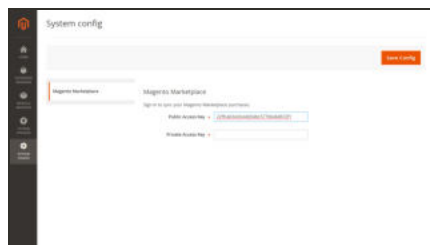
## Module Manager

Module Manager lists the components and modules that are currently installed in your Magento system.



## System Upgrade

The System Upgrade tool can be used to upgrade your installation of Magento. During the process, it checks your system for readiness, creates a backup, and then upgrades your system.



## System Config

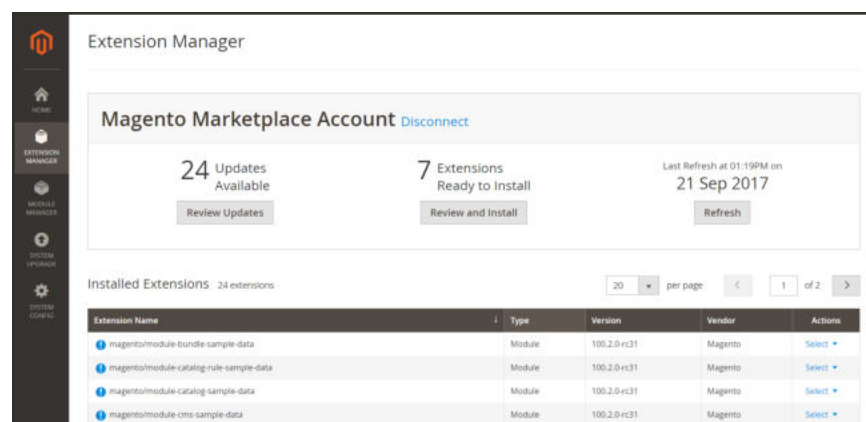
The System Config tool uses the public and private keys from your Marketplace account to synchronize web setup operations.

## Extension Manager

Installing an extension is a three-step process that should take place during off-peak hours. Before the extension is installed, your store is put into maintenance mode, checked for readiness, and backed up. After the extension is installed, it must be configured for your store according to the developer's instructions.

For technical information, see [Run the Extension Manager](#) in the developer documentation.

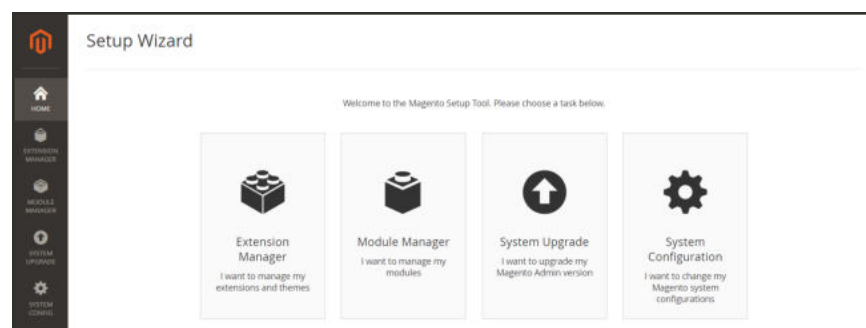
**Important:** Always **flush the cache** after installing or upgrading Magento, or any extensions and modules.



*Installed Extensions*

### To install an extension:

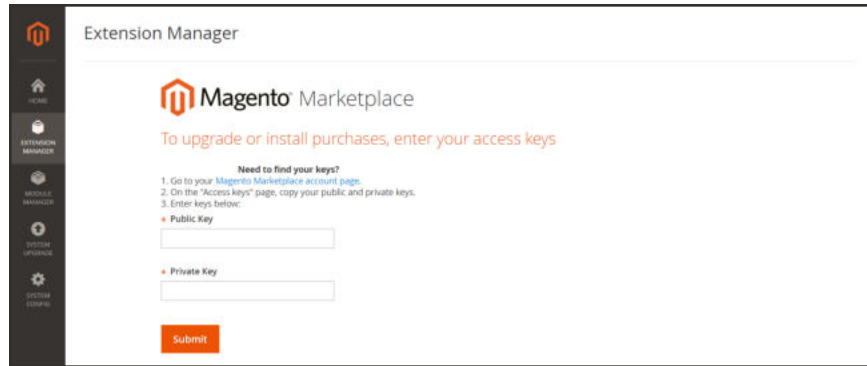
1. Log in to the Admin of your Magento store as a user with full administrator rights.
2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Web Setup Wizard**.



*Web Setup Wizard*

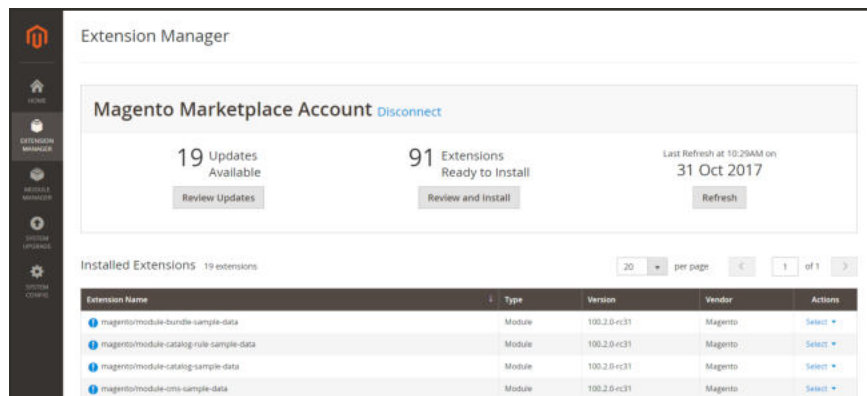
3. Tap **Extension Manager**. To get your access keys, do the following:
  - a. Go to [Magento Marketplace](#). Then in the upper-right corner, log into your account.
  - b. On the **Marketplace** tab of your account, under **My Products**, click **Access Keys**.

- c. If you need to generate a new set of access keys, tap **Create a New Access Key**.
- d. Find the set of access keys in the list. Then, copy and paste your **Public Key** and **Private Key** into Extension Manager.
- e. Tap **Submit**.



*Extension Manager*

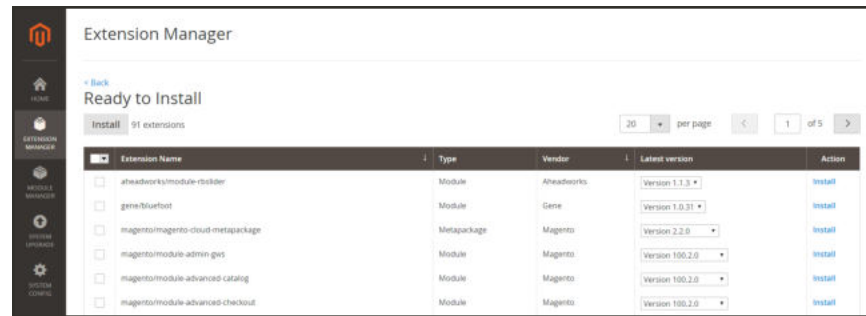
It will take a few minutes to generate the summary and list of all available updates, recently purchased extensions, and currently installed extensions and sample data.



*Summary of Your Marketplace Account*

- 4. In the summary at the top of the page, under **Extensions Ready to Install**, tap **Review and Install**. Then, do the following:

- a. In the list of extensions that are ready to install, mark the checkbox of the extension that you want to install.

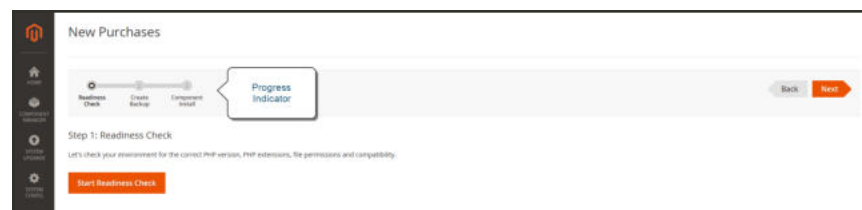


*Extensions Ready to Install*

- b. In the **Latest version** column, choose the version that you want to install. Then in the **Action** column, click **Install**.
5. Follow the onscreen instructions to complete the following:
- Step 1: Readiness Check
  - Step 2: Create Backup
  - Step 3: Component Install

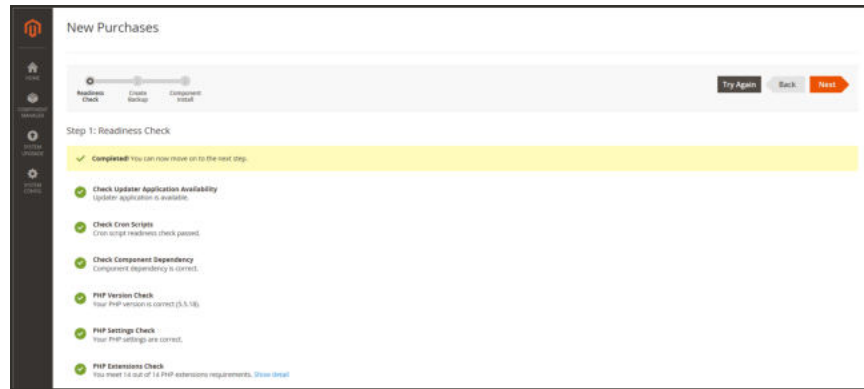
### Step 1: Readiness Check

1. Before the installation begins, your store environment must be checked for compatibility. When ready to begin, tap **Start Readiness Check**. The progress indicator shows where you are in the process.



*Readiness Check*

2. When the Readiness Check completes successfully, tap **Next**.



*Readiness Check Complete*

### Step 2: Create Backup

1. Your store will be put in maintenance mode while the backup is created. When you are ready to begin, tap **Create Backup**. Then, wait a few minutes for the backup to complete.



*Backup Complete*

2. You can see the path to the backup file at the bottom of the report. When the backup is complete, tap **Next**.

### Step 3: Component Install

1. When you are ready to begin, tap **Install**. Then, wait a few moments for the installation to complete.



*Installation Complete*

2. When complete, tap **Back to Setup Tool**. Then, tap the **System Configuration** tile.
3. In the upper-right corner of Extension Manager, click the **Reset** link to log out.
4. **Flush the cache** after installing and enabling the module.

### Step 4: Configure the Extension for Your Store

1. Log in to the Admin of your store.
2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
3. In the panel on the left, find the new tab for the extension you installed. Then, follow the instructions from the extension developer to complete the configuration.

## Module Manager

Module Manager lists the components and modules that are currently installed in your Magento system. Before a module is disabled, the system completes a readiness check and creates a backup.

- The colored dot in the first column indicates if the module is currently “on” or “off”.
- Click the down arrow before the component name to list any dependent packages that are associated with the module.

For technical information, see [Run the Module Manager](#) in the developer documentation.

**Important:** Always **flush the cache** after installing or upgrading Magento, or any extensions and modules.

Component Name	Module Name	Version	Vendor	Action
Magento/module-widget-sample-data	Magento_ShopifySampleData	100.0.0-rc31	Magento	Select
Magento/module-widget	Magento_WebSite	101.0.0-rc31	Magento	Select
<b>Package currently using module</b>				
<b>Module Name</b>	<b>Package Type</b>	<b>Version</b>		
Magento/module-catalog	Module	100.0.0-rc31		
Magento/module-customer	Module	101.0.0-rc31		
Magento/module-reports	Module	100.0.0-rc31		
Magento/module-cms	Module	101.0.0-rc31		
Magento/module-catalog-widget	Module	100.0.0-rc31		
Magento/module-widget-sample-data	Module	100.0.0-rc31		
Magento/module-widget-sample-data	Magento_WebSiteSampleData	100.2.0-rc31	Magento	Select
shopify/facebook-module	Shopify, Facebook	2.0.0	Shopify	Select

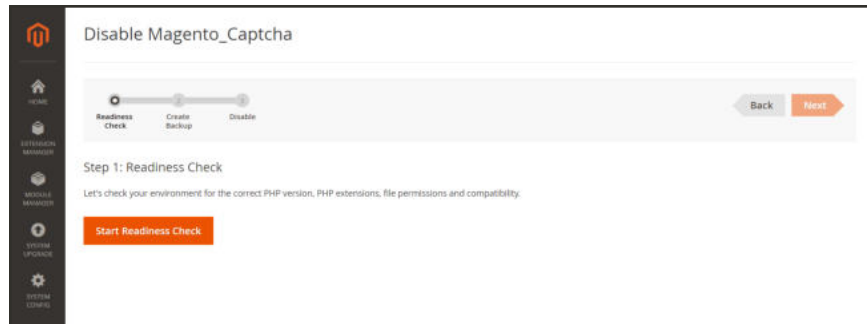
*Module Manager*

### To disable a module:

1. Find the module in the list.
2. In the **Action** column, click **Select**. Then, click **Disable**, and do the following:

- a. Under **Step 1: Readiness Check**, tap **Start Readiness Check** to verify that your installation has the correct version of PHP and required extensions and file permissions.

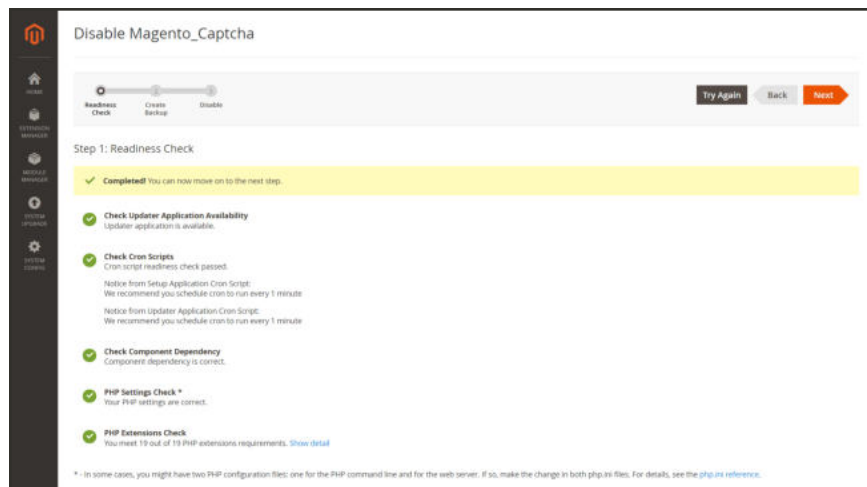
A module with dependent components will fail Readiness Check.



*Readiness Check*

When the readiness check is complete, do one of the following:

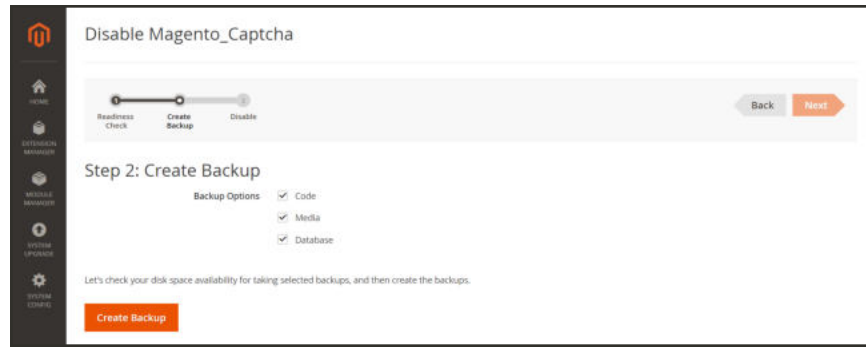
- Tap **Next**.
- Correct any issues, and **Try Again**.



*Readiness Check Complete*

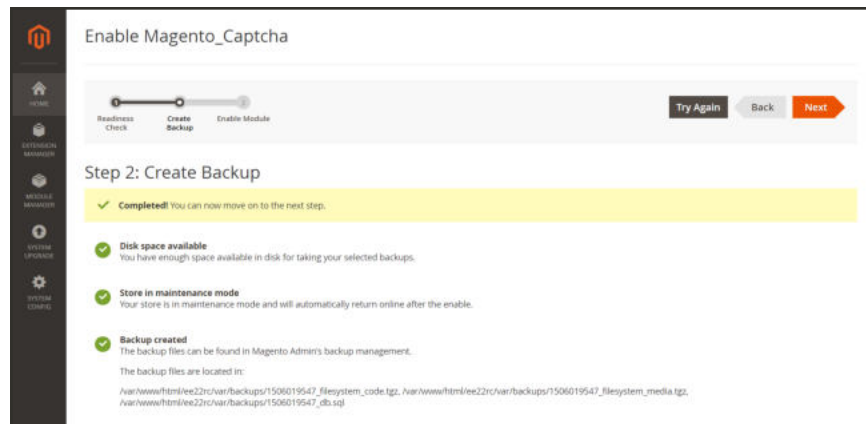
- b. Under **Step 2**, mark the checkbox of each **Backup Option** that you want to include. Then, tap **Create Backup**.



*Create Backup*

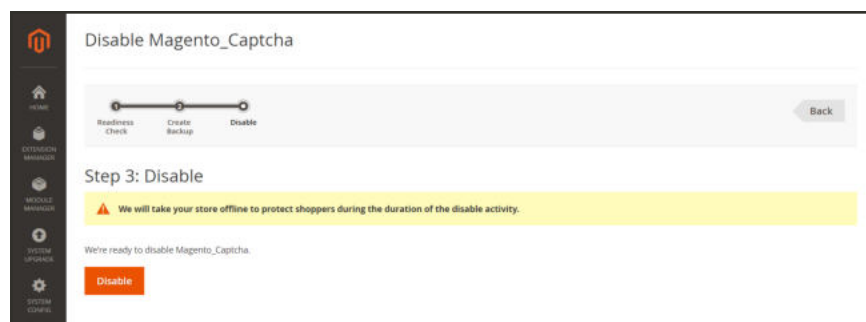
Before the backup is created, the available disk space is checked, and the store is placed in maintenance mode. It might take several minutes — or more — to create the backup, depending on the size of your database.

When the backup is complete, tap **Next**.

*Backup Complete*

- c. Under **Step 3**, tap **Disable**.

Your store is taken offline while the module is disabled.

*Disable Module*

- d. As the process is running, the details appear in the box below. To toggle the display of the log, tap **Console Log**.
- e. When the **Success** page appears, the module is disabled and your store returns to production mode. Tap **Back to Setup Tool** to return to Module Manager.



*Success*

In the Module Manager list, the red dot in the first column means the module is now disabled.

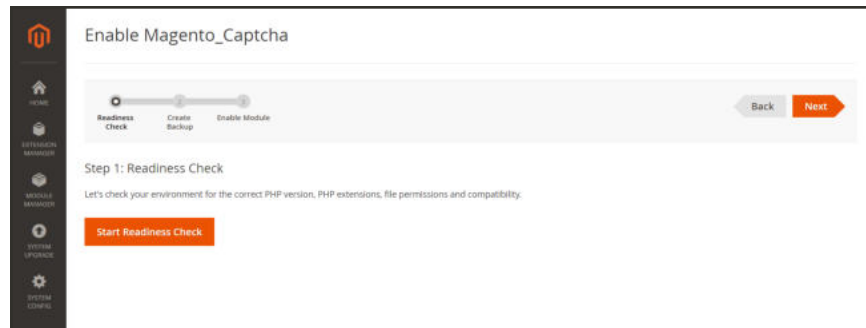
Component Name	Module Name	Version	Vendor	Action
Magento/ModuleSampleData	Magento_BundleSampleData	100.2.0-rc31	Magento	Select
Magento/ModuleBundleStaging	Magento_BundleStaging	100.2.0-rc31	Magento	Select
Magento/ModuleCacheInvalidate	Magento_CacheInvalidate	100.2.0-rc31	Magento	Select
Magento/ModuleCaptcha	Magento_Captcha	100.2.0-rc31	Magento	Select
Magento/ModuleCatalog	Magento_Catalog	102.0.0-rc31	Magento	Select
Magento/ModuleCatalogEvent	Magento_CatalogEvent	100.2.0-rc31	Magento	Select
Magento/ModuleCatalogImportExport	Magento_CatalogImportExport	100.2.0-rc31	Magento	Select
Magento/ModuleCatalogImportExportStaging	Magento_CatalogImportExportStaging	100.2.0-rc31	Magento	Select

*Module Disabled*

### To enable a module:

1. Find the module in the list.
2. In the **Action** column, click **Select**. Then, click **Enable** and do the following:

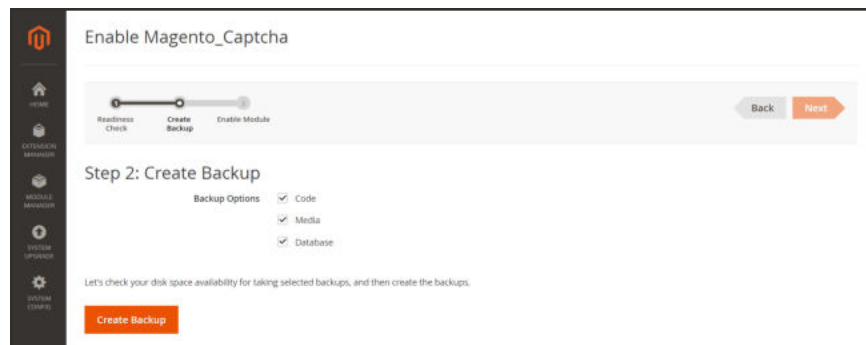
- a. Under **Step 1**, tap **Start Readiness Check**.



*Enable Module*

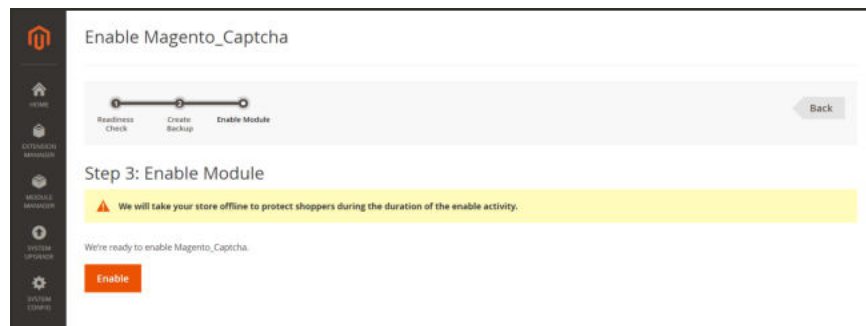
When the readiness check is complete, do one of the following:

- Tap **Next**.
  - Correct any issues, and **Try Again**.
- b. Under **Step 2**, mark the checkbox of each **Backup Option** that you want to include. Then, tap **Create Backup**.



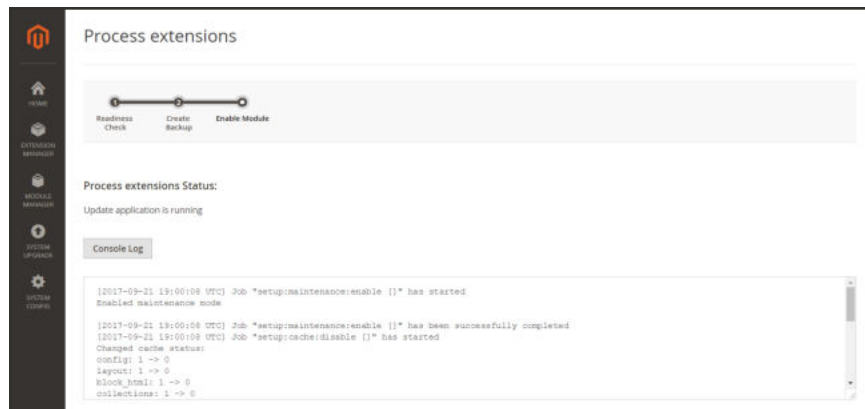
*Create Backup*

- c. When the backup is complete, tap **Next**.
- d. Under **Step 3**, tap **Enable**.

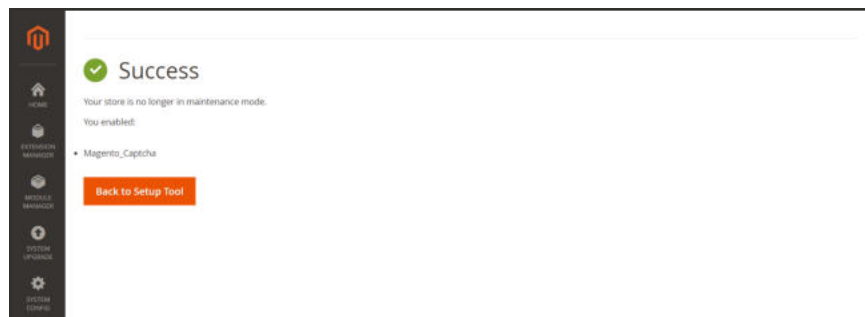


*Enable Module*

- e. As the process is running, the details appear in the box below. To toggle the display of the log, tap **Console Log**.



- f. When the **Success** page appears, the module is enabled and your store returns to production mode. Tap **Back to Setup Tool** to return to Module Manager.



*Success - Module Enabled*

3. **Flush the cache** after installing and enabling the module.

## System Upgrade

The System Upgrade tool can be used to upgrade your Magento installation from the Admin. The upgrade is a three-step process that should take place during off-peak hours. Before upgrade takes place, your store is put into maintenance mode, checked for readiness, and backed up.

We strongly recommend reviewing the latest [release notes](#) and [system requirements](#).

### Upgrade Requirements

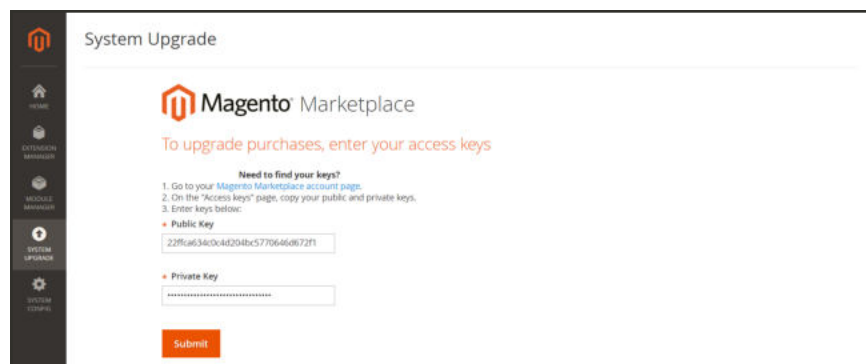
- Only the primary account holder is authorized to download code from the repository.
- The authorization keys that are used to download code must be generated from the primary account.

## Caching and Reindexing

Always flush the cache when upgrading from one version of Open Source or Commerce to another. Two upgrade examples include: upgrading from Magento Open Source 2.2.X to 2.3.X and upgrading from Magento Open Source 2.3.X to Magento Commerce 2.3.X.

**Important:** Always **flush the cache** after installing or upgrading Magento, or any extensions and modules.

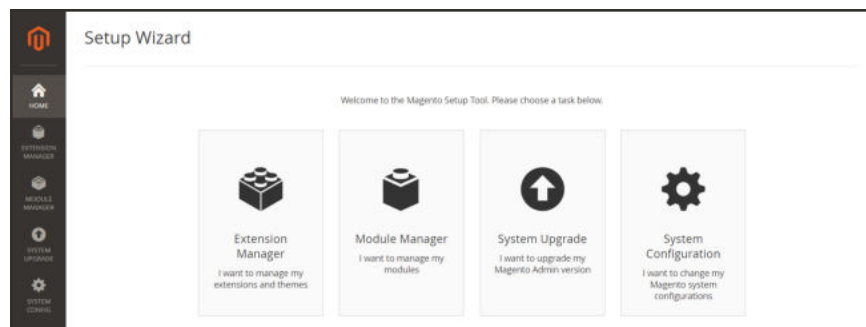
For developer information on upgrades, see the DevDocs [Command Line Upgrade](#). The upgrade instructions include scripts to help run and complete your upgrades. These steps will require developer assistance.



*System Upgrade*

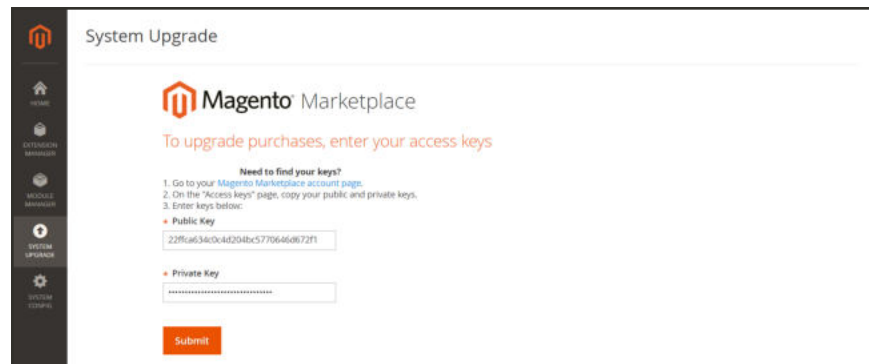
### To upgrade your Magento installation:

1. Log in to the Admin of your Magento store as a user with full administrator rights.
2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Web Setup Wizard**.



*Web Setup Wizard*

3. Tap **Extension Manager**.



*System Upgrade*

4. When prompted, follow the instructions to copy and paste the **Public Access Key** and **Private Access Key** from your Marketplace account. Then, tap **Submit**.
5. Follow the onscreen instructions to complete the following steps:
  - Step 1: Select Version
  - Step 2: Create Backup
  - Step 3: System Upgrade.
6. Flush the **cache** and **reindex** when complete.

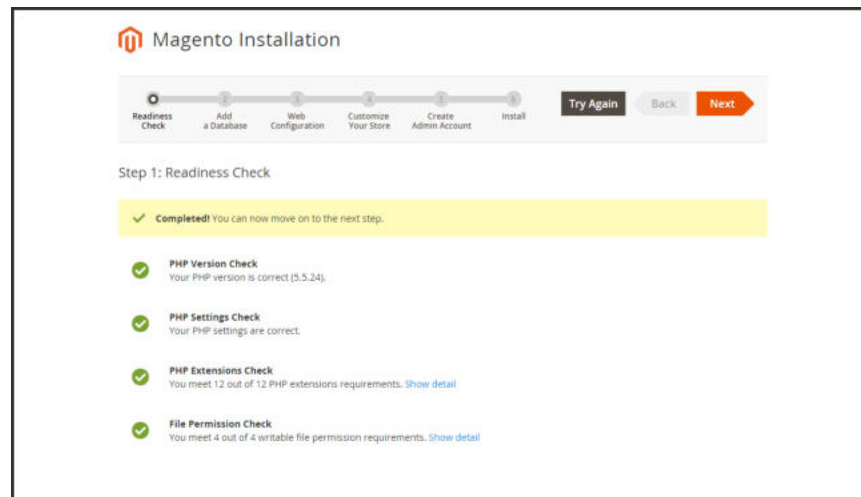
## Web Setup

Web Setup is the second part of the Magento installation that checks system readiness, establishes the database connection, and creates the initial Admin account. The following steps give an overview of the process that takes place at the end of the installation.

### Step 1: Readiness Check

1. To verify that your system meets the system requirements, tap **Start Readiness Check**.
2. When the results appear, tap **Details** for more information. Then, do one of the following:
  - If your system fails the readiness check, correct the issue and tap **Try Again**.
  - If your system meets the requirements, tap **Next**.

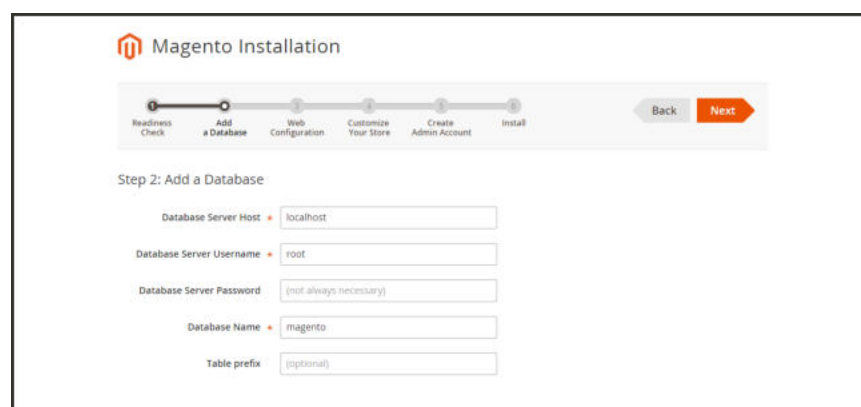
For technical information, see [Installation quick reference \(tutorial\)](#) in the developer documentation.



*Readiness Check*

## Step 2: Add a Database

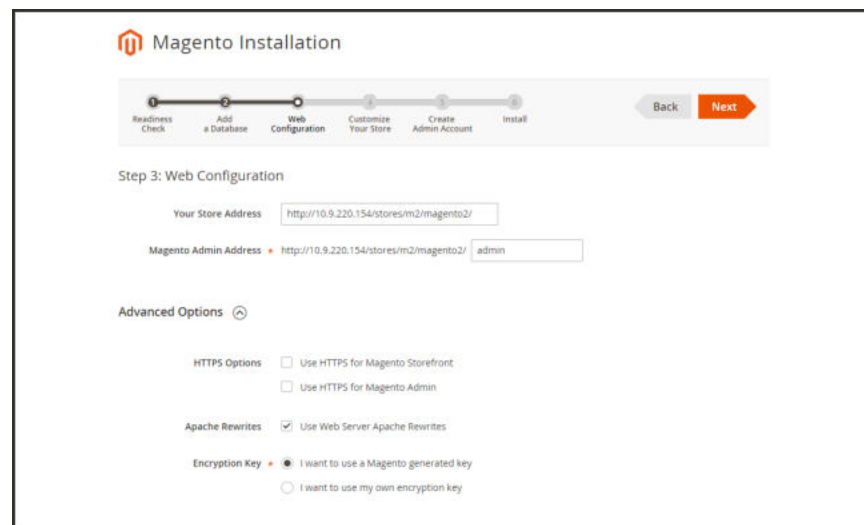
1. To change the MySQL database or update the credentials, do the following:
  - a. Enter the **Database Server Host**. If the database resides on the same server as the Magento code, enter “localhost.”
  - b. Enter the **Database Server Username**.
  - c. Enter the **Database Server Password**.
  - d. Enter the **Database Name**.
  - e. If applicable, enter the **Table prefix**.
2. When complete, tap **Next**. Your credentials must be correct to continue to the next step.



*Add a Database*

### Step 3: Web Configuration

1. Under Web Configuration, do the following:
  - a. In the **Your Store Address** field, enter the full URL of your Magento store.
  - b. In the **Magento Admin Address** field, enter the full URL of the Magento Admin.
2. Expand ☺ the **Advanced Options**, and do the following:
  - a. Mark the checkbox of the **HTTPS Options** that apply to your system:
    - Use HTTPS for Magento Storefront
    - Use HTTPS for Magento Admin
  - b. To enable your server to use **Apache Rewrites**, mark the checkbox.
  - c. Mark the checkbox of the **Encryption Key** setting that applies to your system:
    - I want to use a Magento generated key.
    - I want to use my own encryption key.



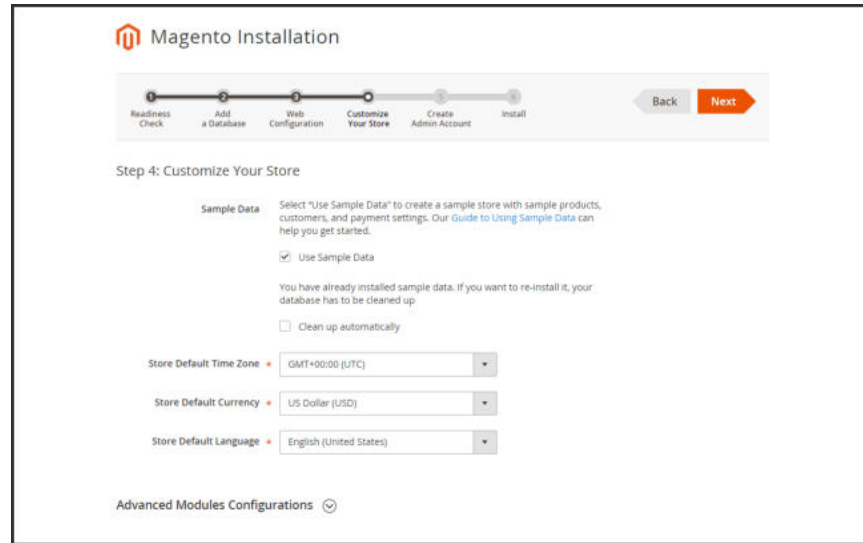
*Web Configuration*

### Step 4: Customize Your Store


1. To install or reinstall the **Sample Data**, do the following:
  - a. To create a sample store with sample products, mark the **Use Sample Data** checkbox.
  - b. If you are reinstalling the sample data, also mark the **Clean up automatically** checkbox.
2. Set **Store Default Time Zone** to the correct time zone for your locale.
3. Set **Store Default Currency** to the default currency key that you accept as payment.

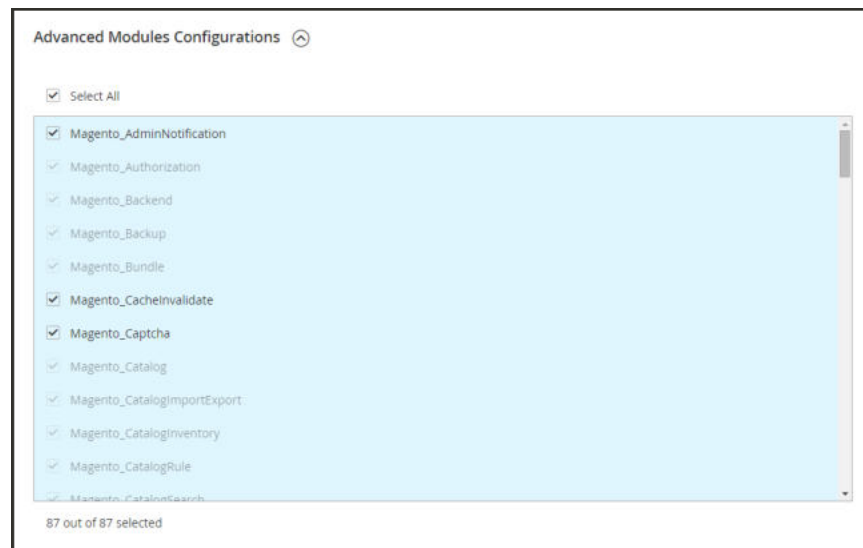


4. Set **Store Default Language** to the primary language of your store.



*Customize Your Store*

5. (Optional) Expand  the **Advanced Modules Configuration**, and do the following:
  - a. To install only specific modules, clear the **Select All** checkbox.
  - b. In the list, select the checkbox of each module you want to install.

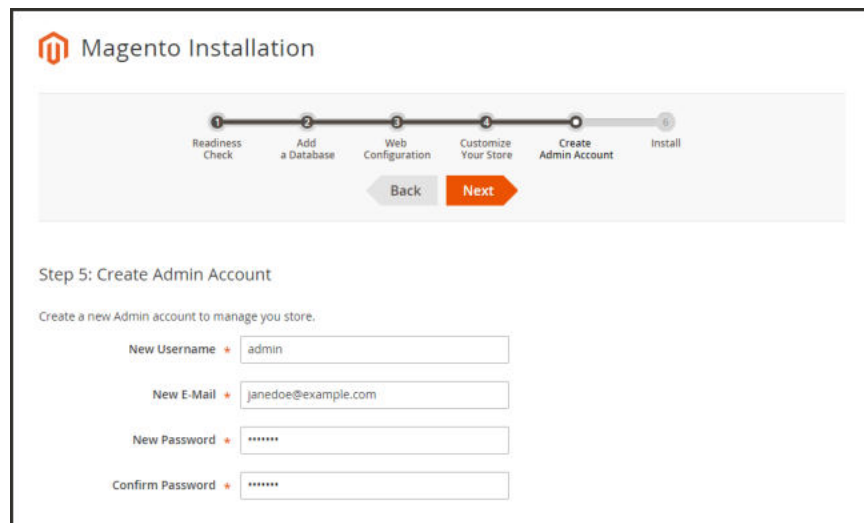


*Advanced Modules Configuration*

6. When complete, tap **Next**.

## Step 5: Create Admin Account

1. Enter a **New Username** for the Admin account.
2. Enter a **New E-Mail** for the Admin account.
3. Enter a **New Password** for the Admin account. Then in the **Confirm Password** field, enter your new password again.
4. When complete, tap **Next**.



The screenshot shows the 'Magento Installation' progress bar with six steps: 1. Readiness Check, 2. Add a Database, 3. Web Configuration, 4. Customize Your Store, 5. Create Admin Account, and 6. Install. The 'Next' button is highlighted in orange. Below the progress bar, the text reads 'Step 5: Create Admin Account' and 'Create a new Admin account to manage your store.' There are four input fields: 'New Username' with the value 'admin', 'New E-Mail' with the value 'janedoe@example.com', 'New Password' with masked characters '\*\*\*\*\*', and 'Confirm Password' with masked characters '\*\*\*\*\*'. A 'Next' button is located at the bottom right of the form area.

*Create Admin Account*

## Step 6: Install

1. When you are ready to complete the setup, tap **Install Now**.



The screenshot shows the 'Magento Installation' progress bar with six steps: 1. Readiness Check, 2. Add a Database, 3. Web Configuration, 4. Customize Your Store, 5. Create Admin Account, and 6. Install. The 'Next' button is highlighted in orange. Below the progress bar, the text reads 'Step 6: Install' and 'You're ready!'. A large orange 'Install Now' button is centered at the bottom of the screen.

*Install*

2. When the installation completes, a page appears with your Magento Admin and database credentials, but without the passwords. You can print the page and keep it for your records. Then, do the following:
  - Launch Magento Storefront
  - Launch Magento Admin
3. If the installation fails to complete, view the **Console Log** to learn more. Then, correct the problem and try again.
4. **Flush the cache** and **reindex** after installing Magento.

### A little Housekeeping

After Setup is complete, do the following to set the recommended permissions for all files and folders in your Magento 2 installation. These instructions require using the command line which may need developer assistance.

To learn more, see [File systems access permissions](#).

1. Change to the Web user who has full permissions to the Magento2 folder. (For example, apache or root.)

```
su - apache
```

2. Change directories to the Magento2 folder, and set the following permissions. You can copy the code, and paste it as a single command.

```
find . -type d -exec chmod 700 {} \; && find . -type f -exec chmod 600 {} \;
&& chmod +x bin/magento
```

# Appendices

## Contents

[Release Notes](#)  
[Change Log](#)  
[Glossary](#)  
[Configuration Reference](#)



## APPENDIX A:

# Release Notes

Release notes provide a detailed description of each product release, with links to additional technical information, installation instructions, and support resources. For details about the most current and past releases, see [Release Information](#).

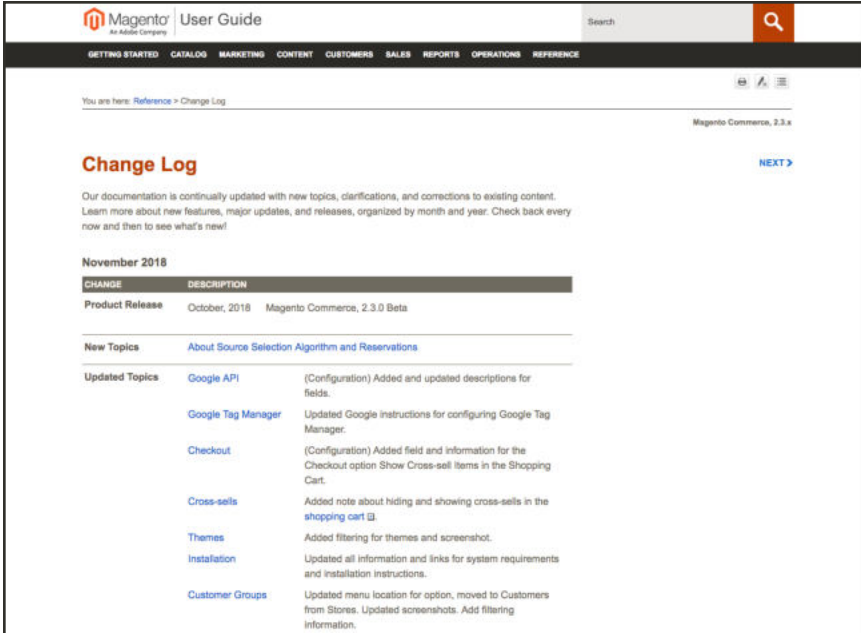
As a best practice, we recommend that you keep your Magento installation up to date, so you can benefit from the latest features and advancements.



## APPENDIX B:

# Change Log

Our documentation is continually updated with new topics, clarifications, and corrections to existing content. The [Change Log](#) in the online user guide lists the major updates, organized by month. If you can't see the most recent changes, refresh your browser or clear the cache. Check back every now and then to see what's new!




You are here: [Reference](#) > [Change Log](#)

Magento Commerce, 2.3.x [NEXT >](#)

### Change Log

Our documentation is continually updated with new topics, clarifications, and corrections to existing content. Learn more about new features, major updates, and releases, organized by month and year. Check back every now and then to see what's new!

**November 2018**

CHANGE	DESCRIPTION
Product Release	October, 2018 <a href="#">Magento Commerce, 2.3.0 Beta</a>
New Topics	<a href="#">About Source Selection Algorithm and Reservations</a>
Updated Topics	<ul style="list-style-type: none"> <li><a href="#">Google API</a> (Configuration) Added and updated descriptions for fields.</li> <li><a href="#">Google Tag Manager</a> Updated Google instructions for configuring Google Tag Manager.</li> <li><a href="#">Checkout</a> (Configuration) Added field and information for the Checkout option Show Cross-sell items in the Shopping Cart.</li> <li><a href="#">Cross-sells</a> Added note about hiding and showing cross-sells in the shopping cart .</li> <li><a href="#">Themes</a> Added filtering for themes and screenshot.</li> <li><a href="#">Installation</a> Updated all information and links for system requirements and installation instructions.</li> <li><a href="#">Customer Groups</a> Updated menu location for option, moved to Customers from Stores. Updated screenshots. Add filtering information.</li> </ul>

*Change Log*





## APPENDIX C:

# Glossary

### A

---

**above the fold**

The web page content that is immediately visible in the browser window; section of a page that is displayed without the need to scroll.

**Admin**

The password-protected back office of your store where orders, catalog, content, and configurations are managed.

**alt text**

The text that is displayed in place of an image when the user is unable to view the image.

**anchor text**

The visible text that is anchored to another page or page section; the literal text of a hyperlink.

**API**

Application Program Interface: A software interface that lets third-party applications read and write to a system using programming language constructs or statements.

**aspect ratio**

The proportional relationship between the width and height of an image.

**attribute**

A characteristic or property of a product; anything that describes a product. Examples of product attributes include color, size, weight, and price.

**authorization**

To give a service permission to perform certain actions or to access resources.

**average inventory cost**

Product price, less coupons or discounts, plus freight and applicable taxes. The average is determined by adding the beginning cost of inventory each month, plus the ending cost of inventory for the last month of the period.

**B**

---

**B2B**

Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

**B2C**

Business to Consumer: Business transactions between a business entity and a consumer.

**banner**

Promotional graphics displayed either horizontally on the top of a web page or vertically on the left or right margins. Website advertisements are often displayed as banners.

**base currency**

The primary form of currency used in store transactions.

**base currency rate**

The base currency rate is the default for your store.

**batch processing**

To perform a task or make a change to multiple items all at once, without manual repetition.

**bounce rate**

The percentage of visitors to your site that leave without viewing any other pages.

**brand**

A unique identity that defines a particular product or group of products.

**breadcrumb**

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

**brick and mortar**

A retail business with a permanent physical location, as opposed to being entirely virtual.

**broken link**

A hyperlink that fails to send the user to its intended web page.

**C**

---

**callout**

A term that is sometimes used to describe a block that is defined as a layout update using XML code.

**canonical URL**

The canonical meta tag redirects search engines to the correct URL, when seemingly duplicate content is encountered on the server.

**capture**

The process of converting the authorized amount into a billable transaction. Transactions cannot be captured until authorized, and authorizations cannot be captured until the goods or services have been shipped.

**cardholder**

A person who opens a credit card account and is authorized to make purchases.

**cascading style sheet**

The markup standard used to apply styles to HTML elements on the page.

**category**

A set of products that share particular characteristics or attributes.

**CCV**

Credit Card Verification code. (See CVV)

**checkout process**

The process of gathering the payment and shipping information that is necessary to complete the purchase of items in the shopping cart. In the final step, the customer reviews and places the order.

**CMS**

Content Management System: A software system that is used to create, edit, and maintain content on a website.

**complex data**

Data that is associated with multiple product options.

**complex product**

A product that requires the customer to choose from a selection of options.

**composite product**

Any product type that offers customers a choice of options.

**Content Delivery Network**

A large distributed network of servers that specializes in the high performance delivery of multi-media content.

**content marketing**

The art of promoting products or services by providing valuable information at no charge.

**conversion**

A marketing term that indicates a goal has been reached. If the goal is to sell a product, conversion is reached when a visitor to your site becomes a buyer.

**conversion rate**

The percentage of visitors who are converted into buyers.

**credit memo**

A document issued by the merchant to a customer to write off an outstanding balance because of overcharge, rebate, or return of goods.

**CSS**

Cascading Style Sheets: A style sheet language that controls the appearance of HTML documents; a way to control the appearance of text, graphics, lists, links, and all other elements on a web page.

**CSV**

Comma Separated Values: A type of file used to store data values which are separated from each other by commas.

**CVM**

Card Verification Method: A way to verify the identity of the customer by confirming a 3-digit or 4-digit credit card security code with the payment processor.

**CVV**

The Card Verification Value, also known as the Card Security Code, provides an additional level of security for online transactions.

**D**

---

**domain**

The address of a website on the web; what the customer types in their browser address bar to access the store.

**double opt-in**

The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

**dynamic content**

A web page that displays different content depending on the user request.

**Dynamic Media URL**

A link to an image that contains a relative reference to the file location in media storage.

**E**

---

**EAV**

Entity Attribute Value

**evergreen content**

Content that has a long shelf life.

## F

---

### **FAQ**

Frequently Asked Questions.

### **favicon**

Short for favorites icon; a 16x16 or 32x32 pixel icon associated with a website; is displayed in the browser address bar and next to the site name in a bookmark list.

### **feed reader**

Software that is used to read syndicated content from RSS feeds.

### **FOB**

Freight On Board: A shipping term indicating who is responsible for paying transportation charges.

### **frontend properties**

Properties that determine the presentation and behavior of an attribute from the standpoint of the customer in your store.

### **fulfillment**

The process of managing customer shipments.

## G

---

### **gateway**

A transaction bridge between a customer and a payment processing service that is used to transfer money between the customer and the merchant.

### **gross margin**

The difference between the cost and price of a product.

## H

---

### **handle**

In programming, a name used to reference an object.

### **home page**

The first home page a visitor sees when they access your website URL. Considered the most important page on your website according to search engine indexing.

### **HTML**

HyperText Markup Language: A standard for tagging and structuring text, images, videos, and other media on a web page.

**I**

---

**invoice**

A document that provides a detailed description of a purchase, including products purchased, quantity, price, shipping cost, sales tax, and total.

**J**

---

**JavaScript**

A scripting language used with HTML to produce dynamic effects and interactions on web pages.

**jQuery**

A popular JavaScript library that is often used to create dynamic and responsive effects.

**K**

---

**keyword**

A term or phrase used in a search to filter for content that is of significant importance to that term or phrase.

**L**

---

**landing page**

A page on your site where a visitor arrives after clicking a link or advertisement.

**layout**

The visual and structural composition of a page.

**layout update**

A specific set of XML instructions that determines how the page is constructed.

**link juice**

The value and authority transferred from one web page to another via hyperlinks (or links). Link juice affects a website's page rank, a factor used to rank a search engine results page.

**liquid layout**

A flexible approach to web design that specifies the size and position of elements as percentages rather than as exact measurements in pixels.

**load sequence**

The order in which scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

**locale**

A set of configurations that defines the user's language, country, tax rate, and other settings.

**login**

The process of signing into an online account.

## M

---

### **markdown**

The amount subtracted from the original price of a product.

### **markup tag**

A snippet of code that can be used to add functionality or content to a page.

### **media storage**

A dedicated space on the content delivery network for your store's assets.

### **merchant account**

An account with a bank or financial institution that makes it possible to accept credit card transactions.

### **meta tags**

Information in a web page that is not displayed on the page itself, but is used by search engines to determine the page title, description, and page keywords.

## N

---

### **navigation**

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

## O

---

### **opt-in**

The process by which a user consents to receiving emails from an online store.

## P

---

### **packing slip**

A document that is usually included in a shipped package that describes the contents. Packing slips do not include financial or account information.

### **path to purchase**

The path a prospect follows that leads to a sale.

### **payment bridge**

An application that helps merchants meet PCI-DSS requirements.

### **payment gateway**

A service that charges your customers' credit cards and sends the funds to your merchant account, for deposit into your business bank account.

### **Payment Gateway**

A third-party service that processes transactions for external payment methods.



**Payment Method**

A way for the customer to pay for the merchandise in your store. Payment methods can be internal or external. The Payment Methods section of the System Configuration includes all basic payment methods and gateways.

**PCI**

Payment Card Industry: Refers to debit and credit cards and their associated businesses.

**price markup**

A percentage added to the cost of an item to determine the retail price.

**privacy policy**

A document that explains the merchant's policies for handling customer information.

**purchase order (PO)**

A written sales contract between a buyer and seller that describes the merchandise or service to be purchased from a vendor.

**R**

---

**redirect**

A method used to alert browsers and search engines that a page has been moved. 301 Redirect: Permanent change 302 Redirect: Temporary change

**relative link**

A hyperlink that includes only the address of the linked page that is relative to the linking page, rather than the full URL.

**return policy**

A document that explains the merchant's rules regarding the return of products by customers.

**robots.txt**

A file placed on a website that tells search engine crawlers which pages not to index.

**RSS feed**

Really Simple Syndication: A technology that creates web content syndication and allows web users to subscribe to product feeds, websites, and blogs.

**S**

---

**SaaS**

Software as a Service: A software delivery model where the vendor provides the software and hosting environment, and customers pay for the service by subscription or per use.

**Sass/Compass**

A CSS pre-compiler that provides organizable, reusable CSS.

**security certificate**

Information that is used by the SSL protocol to establish a secure connection.

**SEO**

Search Engine Optimization: The process of improving a website's search engine rankings in order to increase valued visitors.

**SERP**

Search Engine Results Page

**settlement**

Settlement occurs when the acquiring bank and the issuer exchange funds and the proceeds are deposited into the merchant account.

**shipping carrier**

A company that transports packages. Common carriers include UPS, FedEx, DHL, and USPS.

**shopping cart**

A grouping of products that the customer wishes to purchase at the end of their shopping session.

**sidebar**

The right or left column of a two-column page layout.

**sitemap**

A page that provides search engines with an efficient, alternate route through your site.

**SKU**

Stock Keeping Unit: A number or code assigned to a product to identify the product, options, price, and manufacturer.

**splash page**

A promotional page with a product or advertisement; normally displayed before the home page.

**SSL certificate**

A validation and security mechanism that identifies the merchant and encrypts credit card and other sensitive information.

**static block**

A fixed content block that can be displayed on various content pages in a store.

**static content**

Content that does not change frequently. See also dynamic content.

**static files**

The collection of assets, such as CSS, fonts, images, and JavaScript that is used by a theme.

**T**

---

**theme**

A package that contains graphics and appearance information, and customizes the look and feel of the store.

**transactional email**

A notification email sent to the customer when a transaction is processed.

**transactional emails**

An automated email message that is sent in response to a specific event or transaction.

**U**

---

**URL**

Uniform Resource Locator: The unique address of a page on the internet.

**usability**

Refers to the degree to which a product or service is easy to use by its customers.

**W**

---

**widget**

A prepared snippet of code that adds functionality and/or dynamic effects to your store.

**WYSIWYG**

What You See Is What You Get: An editor that displays formatted text as it will appear in its final published form.

**X**

---

**XML**

Extensible Markup Language: A markup format derived from SGML that it used to format information for publication and distribution.

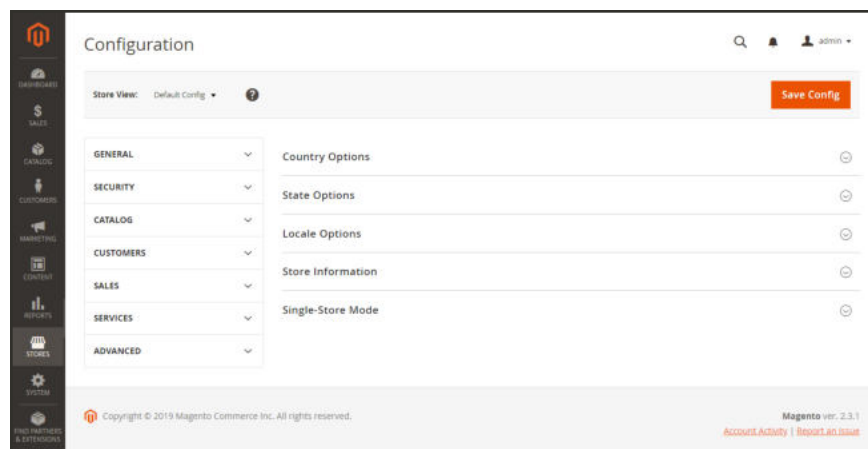
## APPENDIX D: Configuration Reference

This reference has field descriptions for every configuration setting in Magento Open Source. To learn how to apply configuration settings to specific store views, see [Configuration Scope](#).

From the HTML version of the guide, you can drill down through any section of the reference, and follow the links to corresponding topics in the user guide. From step-by-step instructions, click any linked caption below a screenshot to jump to the field descriptions.

Follow these links for the corresponding section in the online reference:

- [General](#)
- [Security](#)
- [Catalog](#)
- [Customers](#)
- [Sales](#)
- [Services](#)
- [Advanced](#)



*Configuration*



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