



Magento®

Content Management System

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About the Tutorial

Magento is an open source E-commerce software, created by Varien *Inc.*, which is useful for online business. It has a flexible modular architecture and is scalable with many control options that is helpful for users. Magento uses E-commerce platform which offers organizations ultimate E-commerce solutions and extensive support network.

This tutorial will teach you the basics of Magento using which you can create websites with ease. The tutorial is divided into various sections and each of these sections contain related topics with screenshots explaining the Magento admin screens.

Audience

This tutorial has been prepared for anyone who has a basic knowledge of HTML and CSS and has an urge to develop websites. After completing this tutorial you will find yourself at a moderate level of expertise in developing e-commerce sites using Magento.

Prerequisites

Before you proceed with this tutorial, we are assuming that you are already aware about the basics of HTML and CSS. If you are not, then we suggest you to go through our short tutorials on HTML and CSS Tutorial.

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Part 1: Basics

1. Magento – Overview

What is E-commerce?

E-commerce (Electronic Commerce) is a type of business that involves the commercial transaction or purchasing or selling of goods and services through electronic channels known as internet. It was first introduced in the year 1960 through EDI (Electronic Data Interchange) on VAN (Value-added network). Using E-commerce, you can sell physical products or services (where the payment is made online).

Following are the categories of E-commerce:

- **B2B (Business to Business):** This transaction is between businesses. It is between the wholesaler and the retailer or between the manufacturer and the wholesaler.
- **B2C (Business to Consumer):** This transaction is between businesses and consumers. In this type of transaction, merchants sell products to consumers through shopping cart software.
- **C2C (Consumer to Consumer):** In this type of transaction, one consumer or customer interacts with other consumers through internet.
- **C2B (Consumer to Business):** This transaction is between the consumer or the customer and businesses or organizations where the consumer makes a product that the organization uses it to complete the business.

What is Magento?

Magento is an open source E-commerce software, created by *Varien Inc.*, which is useful for online business. It has a flexible modular architecture. It is scalable and it has many control options that helps the user to build both user-friendly and search engine friendly websites.

Magento uses E-commerce platform which offers companies the ultimate E-commerce solutions and extensive support network. Magento allows user to update E-commerce website automatically. It is simple, quick and versatile to use.

Magento was developed by *Varien Inc.*, and it was first released on *March 31, 2008*.

Why to Use Magento?

- Magento is an open source E-commerce software.
- Magento is scalable and offers small organizations to build business.
- Magento enables searching and sorting of products in several ways.
- Magento easily integrates with many of the third-party sites which are needed to run effective E-commerce website.

Features

- Magento provides different payment methods such as credit cards, PayPal, cheques, money order, Google checkouts, etc.
- Magento enables shipping of products in one order to multiple addresses.
- Magento helps to manage the orders easily by using the admin panel.
- Magento provides order of product status and history of product. It also supports e-mail and RSS feeds.
- Magento supports multiple languages, different currencies and tax rates.
- Magento filters the products and displays in grid or list format.
- Magento makes it easy to browse the products. It has features such as image zoom-in and checking of stock availability.
- Magento has built-in SEO (Search Engine Optimization).

Advantages

- Magento is user friendly E-commerce software.
- Magento is compatible with smartphones, tablets and other mobile devices.
- Magento provides multiple payment options, so every visitor can make payment based on their preferred payment gateway.
- Magento has many extensions which support the development of an online store.

Disadvantages

- Magento uses larger disk space and memory.
- Magento takes longer time to build the customized functionality.
- Magento is very slow compared to other E-commerce sites.
- Magento needs proper hosting environment. If the hosting environment is improper, the user can face many problems.

2. Magento – Installation

This chapter provides step-by-step procedure for Magento installation. Before installing Magento, you require the following system requirements.

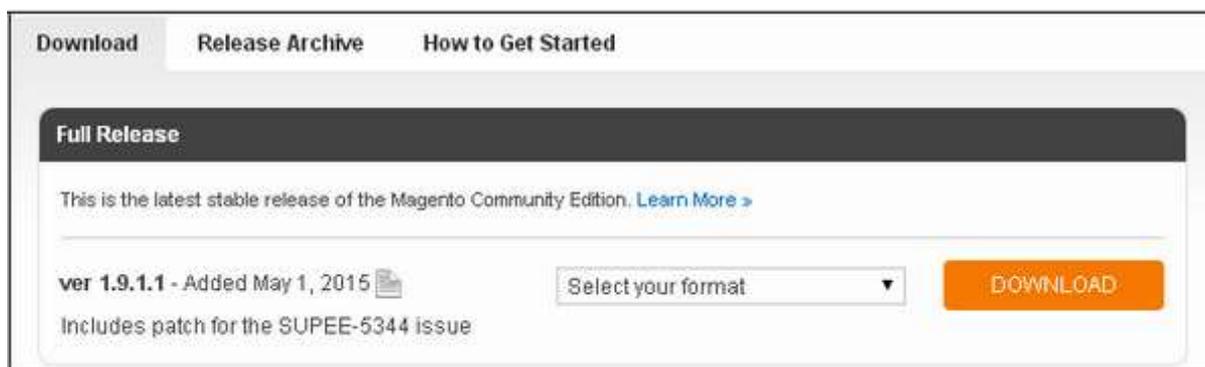
System Requirements for Magento

- **Database:** MySQL 5.1+
- **Web Server:**
 - Apache 2.x
 - Nginx 1.7.x
- **Operating System:** Cross-platform
- **Browser Support:** IE (Internet Explorer 7), Firefox, Google chrome
- **SSL (Secure Socket Layer):** A valid security certificate is required for HTTPS
- **PHP Compatibility:** PHP 5.4+

Download Magento

Step (1): Open the link

<https://www.magentocommerce.com/products/downloads/magento/>, you will get to see the following screen:



Step (2): Click on the dropdown menu, the archive file is available in .zip, .tar, gz and .tar.bz2 for downloading.

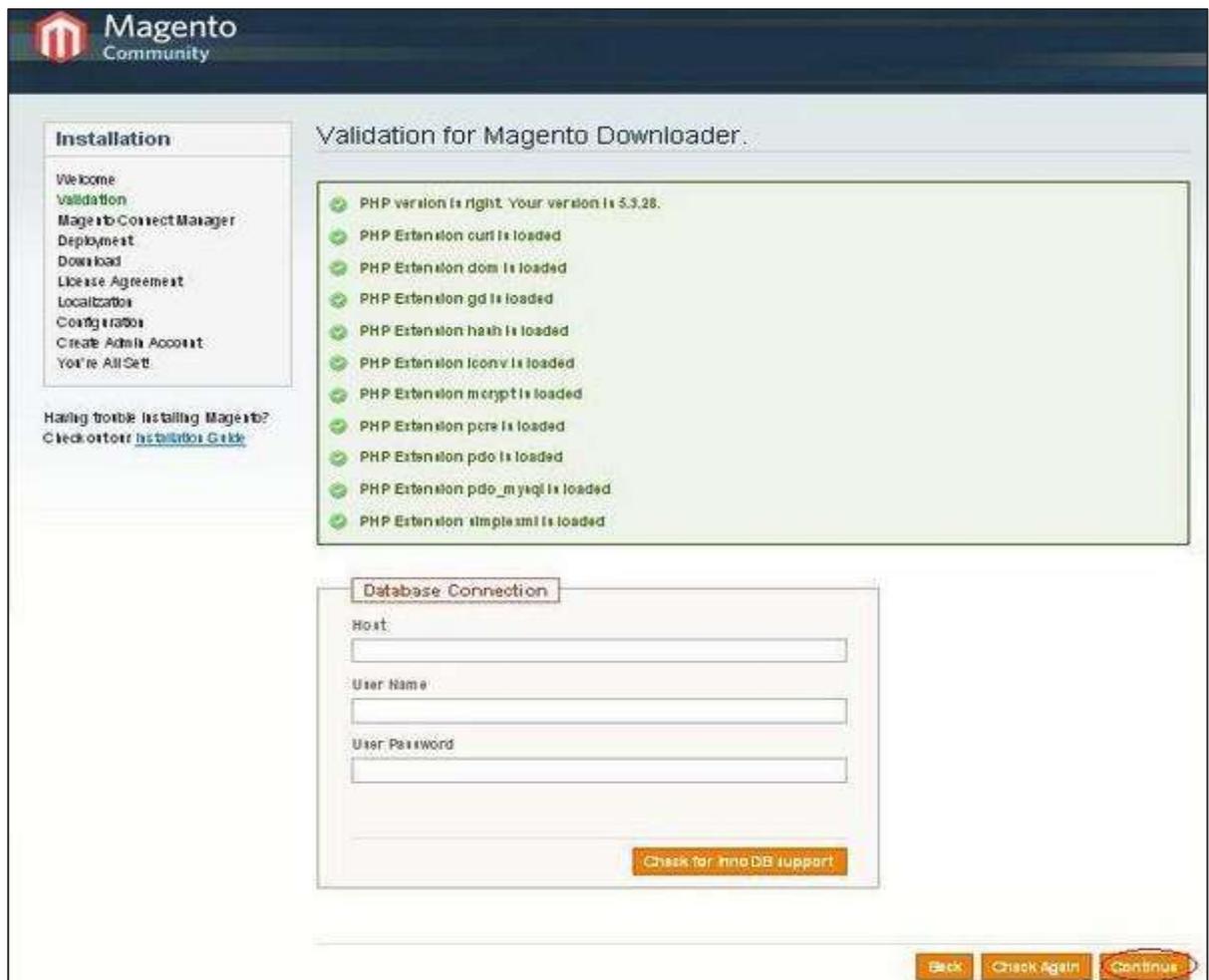
Step (3): Extract the Magento web files from the archive on your computer and upload it into your web server or localhost.

Step (4): Magento requires MySQL database. So create a new empty database and user/password (for e.g. user as "root" and password as "root" or else you can set as per your convenience) for Magento.

Step (5): Open your browser and navigate to your Magento file path (for e.g. <http://localhost/magento>) to start your Magento installation. Then you will get a screen of the Magento installer as shown in the following screenshot.



Step (6): Click on Continue button and you will get Validation for Magento Downloader screen as shown in the following screen.



Here, enter the database details, if you want to check for InnoDB support for Magento. Otherwise, click on **Continue** button to proceed to the next step.

Step (7): Next, you will get Magento Connect Manager Deployment screen.

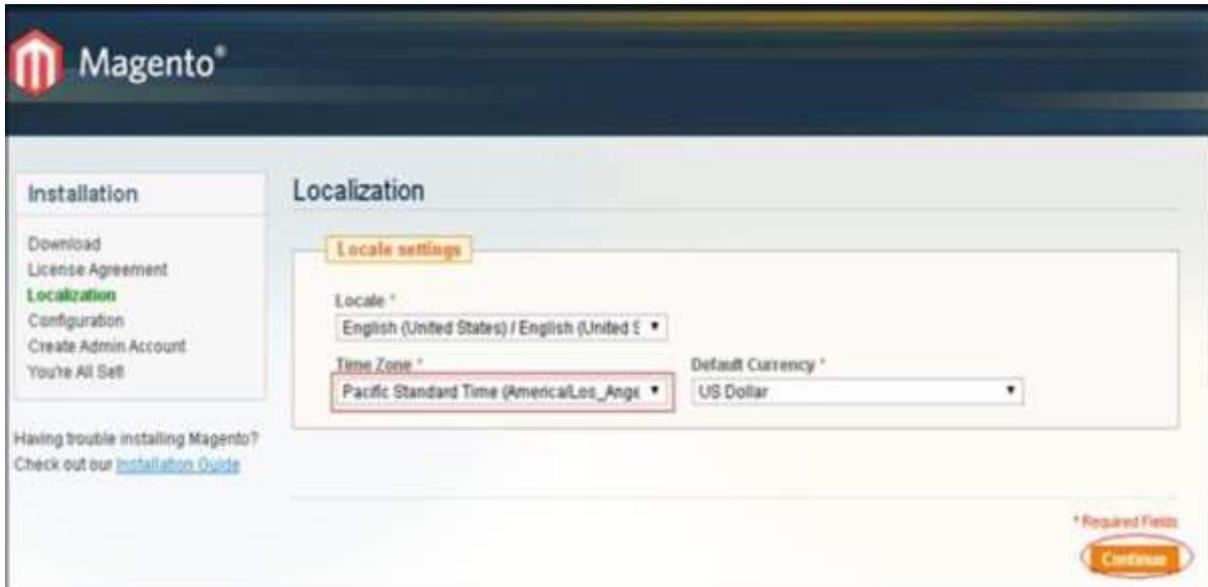


It gives protocol name (HTTP or FTP), stability version such as *stable*, *beta*, *alpha* and deployment type. Select proper options and click on the **Continue** button. It will start the downloading process for Magento.

Step (8): Magento's Installation Wizard screen pops up. Check the **I agree to the above terms and conditions** checkbox and click on the **Continue** button.

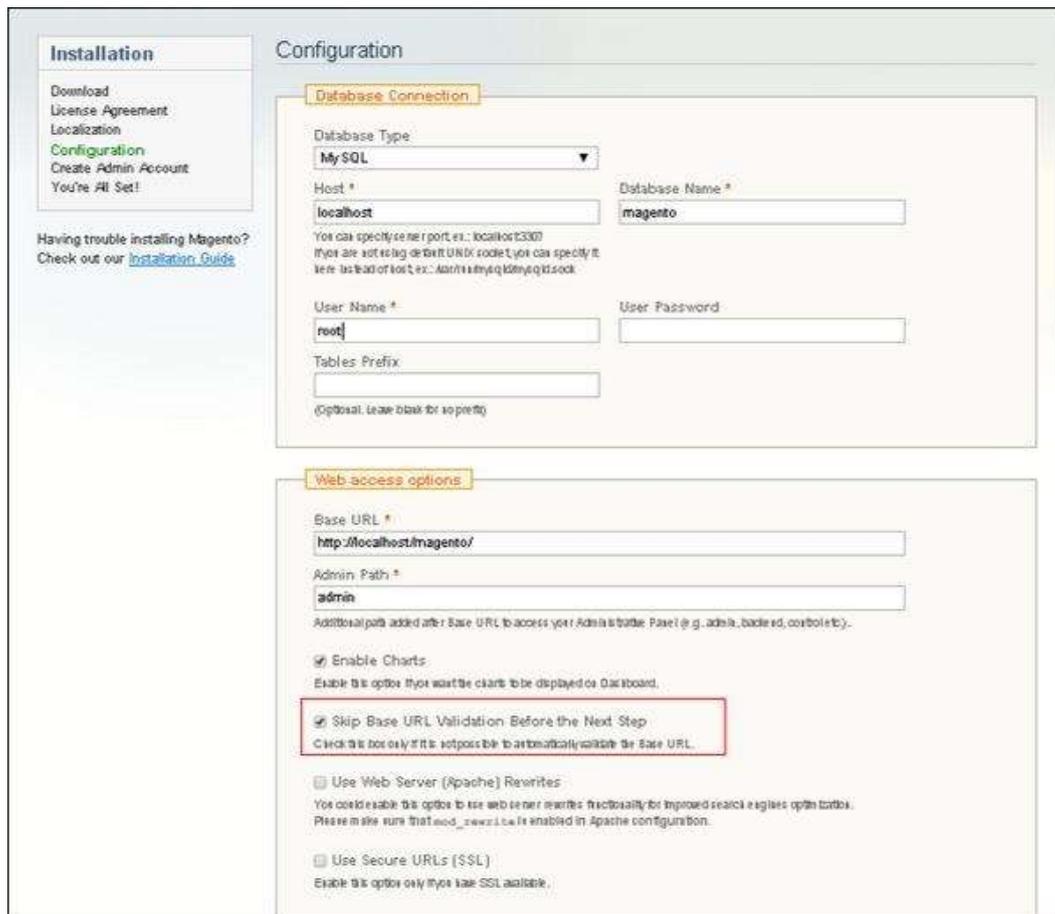


Step (9): Next you will get the Localization screen for selecting the Locale, Time Zone and Currency as shown in the following screen.



Select proper locale name, time zone and currency and click on the **Continue** button.

Step (10): The next screen that pops up is the Configuration screen.



Fill the database information such as *Database Type, Host, Database Name, User Name* and *User Password*. If you do not want to validate the Base URL, then tick the **Skip Base URL validation before Next Step** checkbox and click on the **Continue** button.

In case the `http://localhost/magento` doesn't work, use this as base URL instead-
`http://127.0.0.1/magento`

This step will take some time as Magento will be creating the Database Tables.

Step (11): Now, go to the Create Admin Account screen.

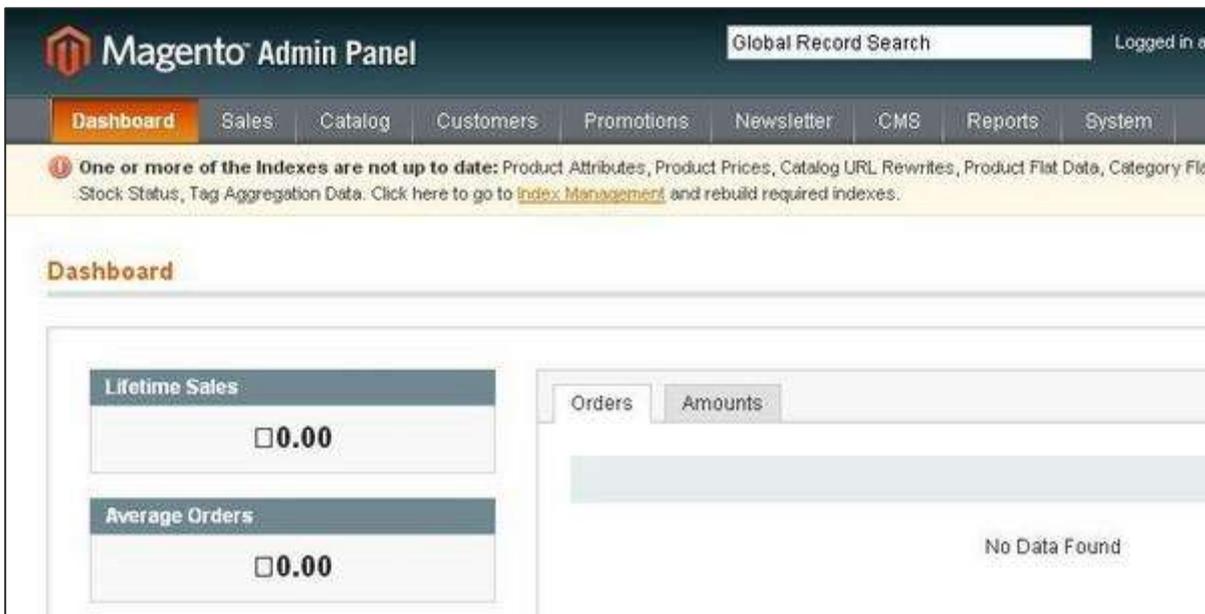
Here enter your personal information such as *First Name, Last Name and Email* and the Login Information such as *Username, Password and Confirm Password* for admin to use in backend. Need not worry about *Encryption Key* field as Magento will generate a key on the next page. After filling all information, click on the **Continue** button.

Step (12): Copy the encryption key, which will be used to encrypt passwords, credit cards and other confidential information. Then you can select Frontend or Backend of new Magento website.

Step (13): After successful installation of Magento, click on the Go to Backend button to login to admin panel.

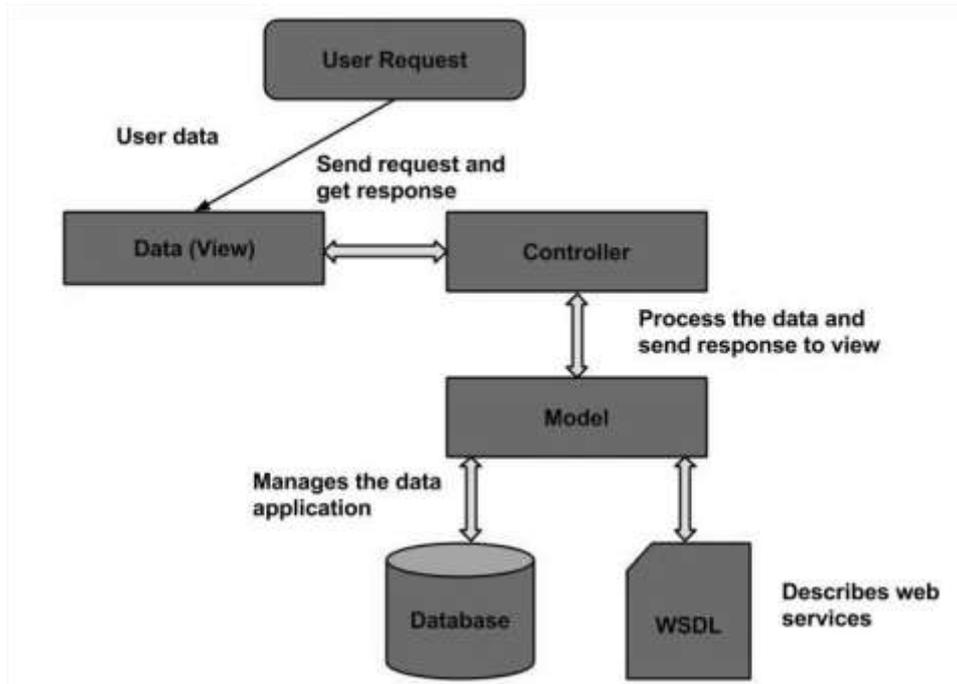


Step (14): After logging in, you will get the Dashboard of Admin panel as shown in the following screen.



3. Magento – Architecture

In this chapter, we are going to discuss the architectural style of Magento, for implementing user interfaces. The following diagram shows the architecture of Magento:



The Magento architecture comes with Models, Views and Controllers.

- **User Request:** The user sends a request to a server in the form of request message where web browsers, search engines, etc. act like clients.
- **View:** View represents the data in particular format. It is the user interface which is responsible for displaying the response for user request. It specifies an idea behind the presentation of the model's data to the user. Views are used to reflect "how your data should look like".
- **Controller:** The controller is responsible for responding to user input and perform interactions on the data model objects. It uses models to process the data and send responses back to the view.
- **Model:** The model is responsible for managing the data of the application. It contains logic of the data and represents basic data object in the framework. It responds to request from the view and to the instructions from the controller to update itself.
- **Database:** Database contains the information which is requested from the user. When the user requests data, view sends requests to the controller, the controller requests from the model and the model fetches the required information from the database and responds to the user.
- **WSDL:** WSDL stands for Web Services Description Language. It is used for describing web services and how to access them.

Part 2: Store Setup

4. Magento – Product Overview

Magento Products

Products are the items or things that are sold in Magento. Product can be anything that is capable of satisfying the customer's needs. This includes both physical products and services.

Product Types

Magento provides 6 different types of products. Appropriate selection of product type is essential for accessing the appropriate set of features required to sell the product. Following are the product types available in Magento.

- **Simple Products**
- **Grouped Products**
- **Configurable Products**
- **Virtual Products**
- **Bundled Products**
- **Downloadable Products**

Simple Products

These are general product type, which are the most used products. In this section, there are no options for selecting size or color of the product. **Example:** Coffee cup, DVD's, Camera lens, etc.

Grouped Products

This is a group of simple products. In this type, you cannot specify a specific price for a product; you can just specify the discount. **Example:** Cell phone + Memory card + Earphone

Configurable Products

In this type, customers can select products according to their color and size before purchasing. **Example:** Cell phones obtained in different colors and sizes.

Virtual Products

Virtual products are those which do not have physical counterpart, i.e. these are used for virtual items. These products cannot be shipped or stocked. **Example:** Online training course.

Bundled Products

Bundled products are those products which cannot be sold separately and doesn't give any choice to the end user.

Example: Consider you want to buy a cell phone which includes earphone, memory card, battery, charging cable, etc. These are together called bundled products. These products cannot be sold individually but can be sold within the bundle product.

Downloadable Products

Products which are available for download are known as downloadable products.

Example: MP3 file, ebook, documents, etc.

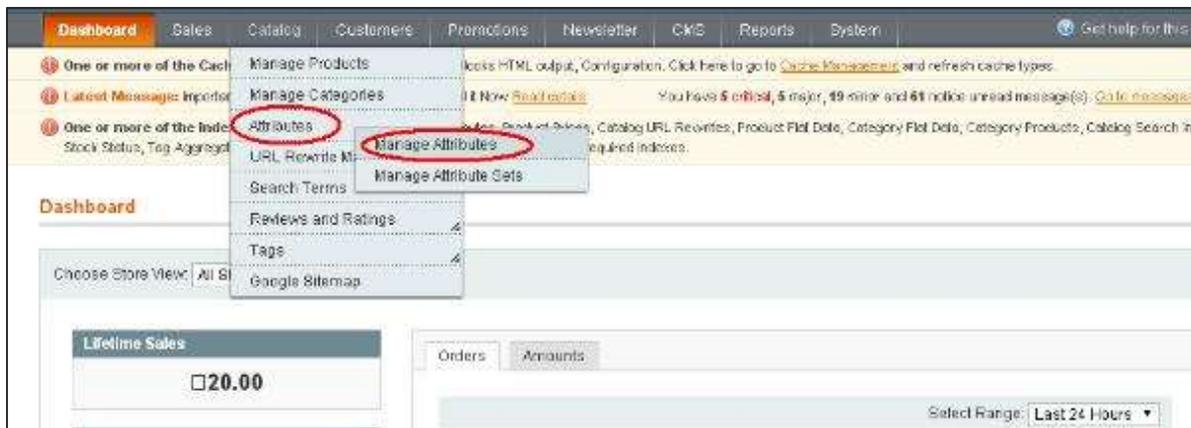
Product Attributes

Attribute describes the property of the product. Product attributes helps to set product properties such as color, size width, height, etc. and makes the product unique. You can add as many attributes to your product as required.

The following steps describe, how to set up the attributes for products in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Catalog** and select **Attributes** from the dropdown menu and click on the **Manage Attributes** option.



Step (3): Under **Manage Attributes** section, you will find different attributes used in the system. For adding new attribute, click on **Add New Attribute** seen on the top right corner of the screen.

Manage Attributes

Page 1 of 3 pages | View 20 per page | Total 43 records found

Reset Filter Search

Attribute Code	Attribute Label	Required	System	Visible	Scope	Searchable	Use in Layered Navigation	Comparable
color	Color	No	No	No	Global	Yes	Filterable (with results)	Yes
cost	Cost	No	No	No	Website	No	No	No
country_of_manufacture	Country of Manufacture	No	Yes	No	Website	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
custom_design_to	Active To	No	Yes	No	Store View	No	No	No
custom_layout_updates	Custom Layout Updates	No	Yes	No	Store View	No	No	No
description	Description	Yes	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
group_price	Group Price	No	Yes	No	Website	No	No	No

Step (4): Now you need to set the attribute properties for your product. After setting up all the required attribute properties, click on **Save Attribute** button to store the product information.

New Product Attribute

Back Reset Save Attribute Save and Continue Edit

Attribute Properties

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

Scope
▲ Declare attribute value saving scope

Catalog Input Type for Store Owner

Unique Value
▲ Not shared with other products

Values Required

Input Validation for Store Owner

Apply To *

Use To Create Configurable Product

5. Magento – Set Up Languages

In this chapter, we will see how to use the Multilanguage feature of Magento.

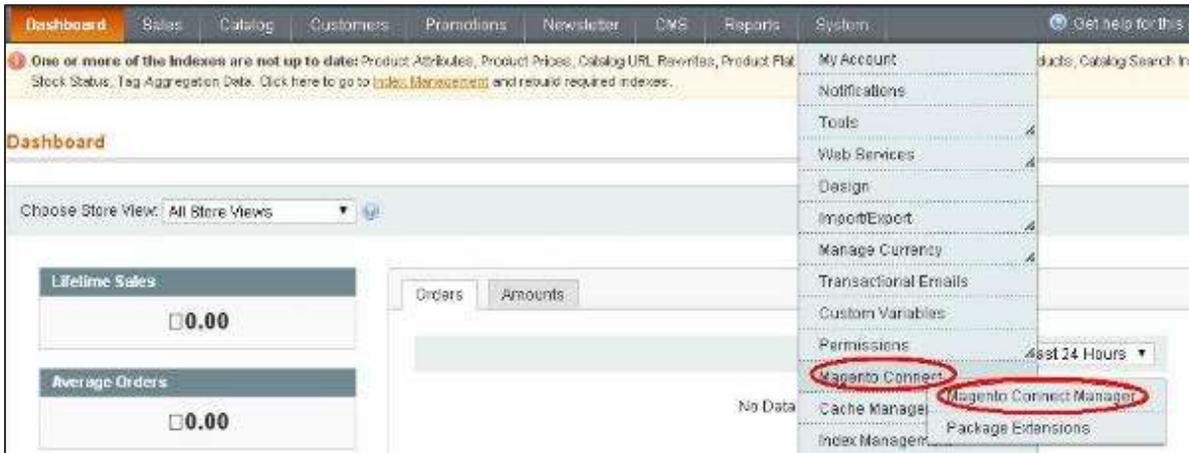
Step (1): Go to the official website of Magento and search for a new language pack using search field. For instance, if you want to search for **Italian** language, type **Italian Language Pack** in search box and press enter. It displays the installation package file. Click on it.



Step (2): You get a package for installing language. You must login to the site to get a language pack. After you login, you get the **Extension Key** as shown in the following screen.

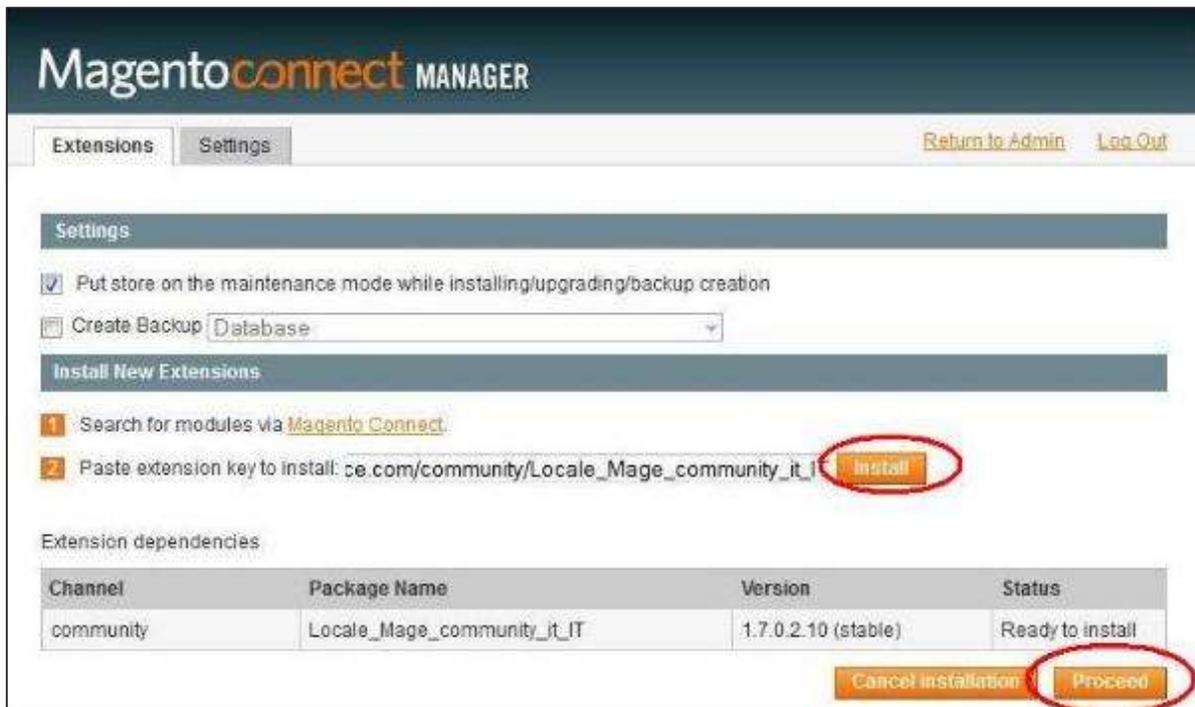


Step (3): Now login to your Magento Admin Panel and go to the **System --> Magento Connect -->Magento Connect Manager** option.

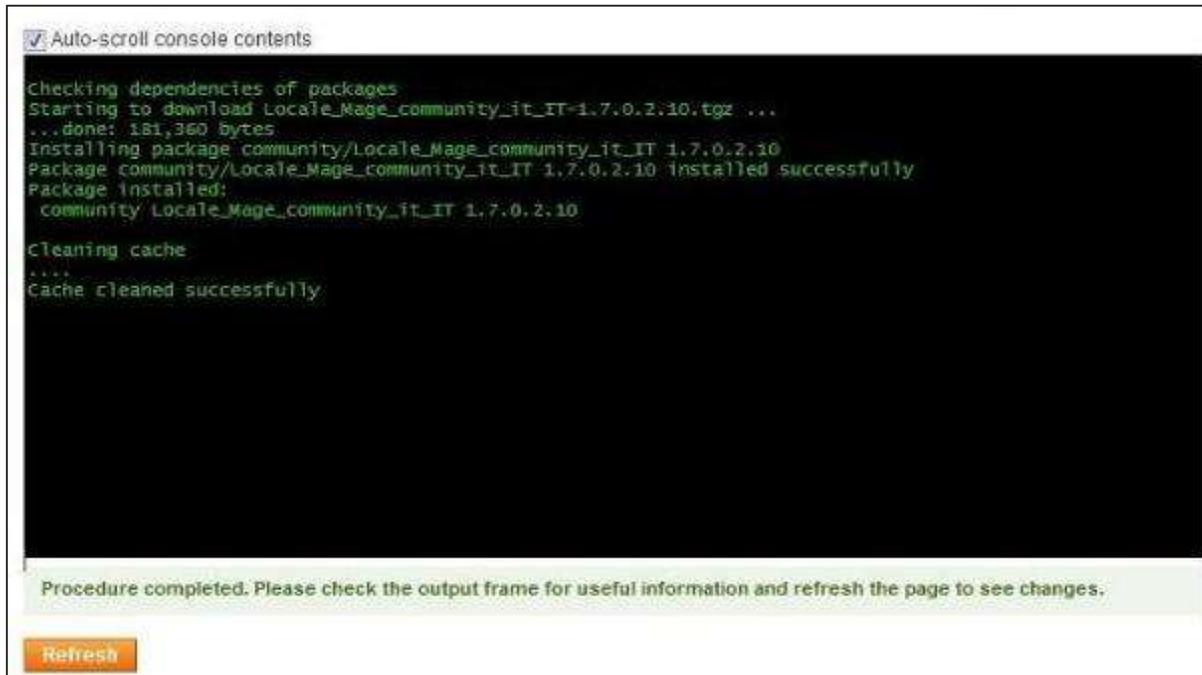


Step (4): It again asks you to login. Enter your credentials to redirect to **Magento Connect Manager** window.

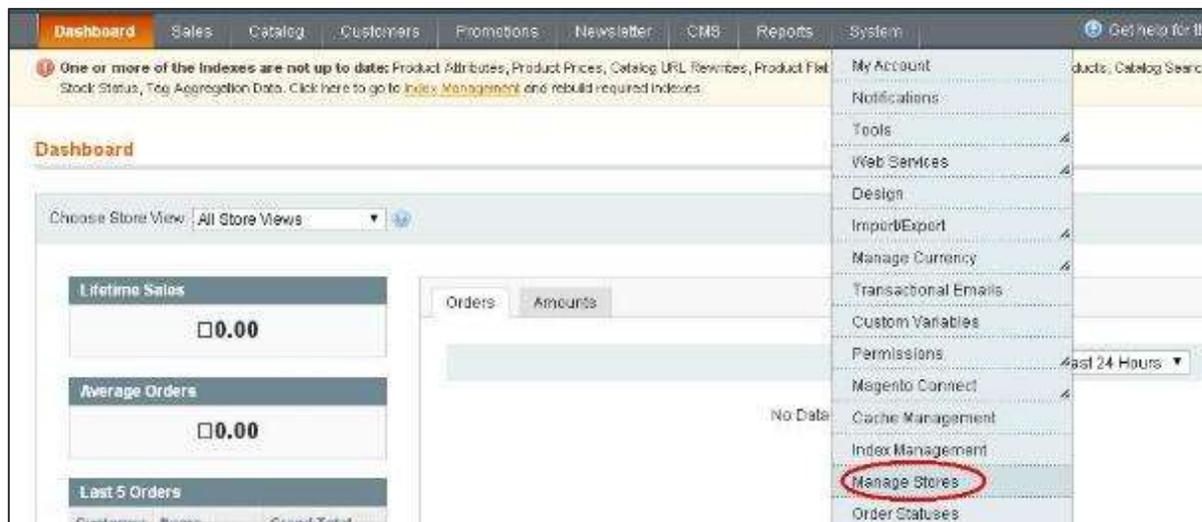
Step (5): Now under **Extensions** section, paste the **Extension Key** (that you had already copied in step 2) and click on **Install** button. It then displays a status as "Ready to install" and click on **Proceed** button to install the language.



Step (6): It checks for dependencies of packages and displays the message as **Cache cleaned successfully**. Now go to admin dashboard page by clicking on **Return to Admin** link.



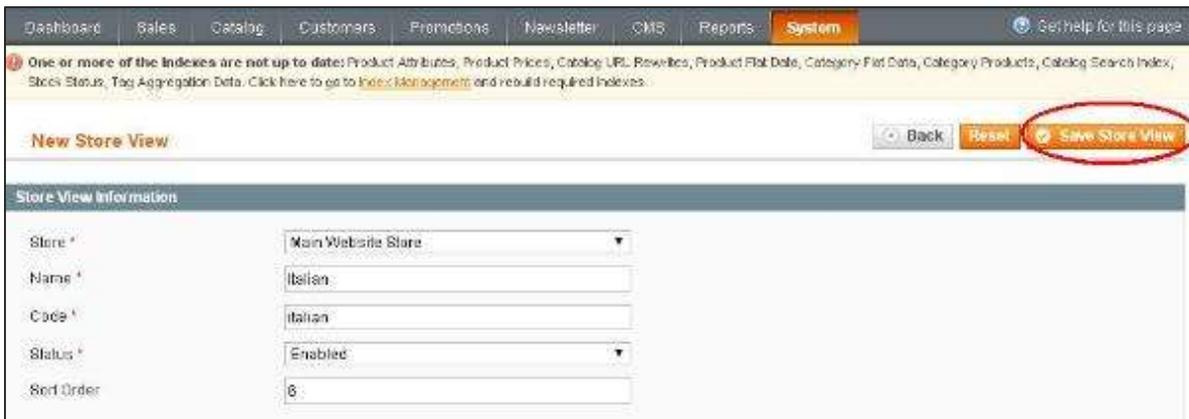
Step (7): Go to the **System** menu and click on **Manage Stores** option.



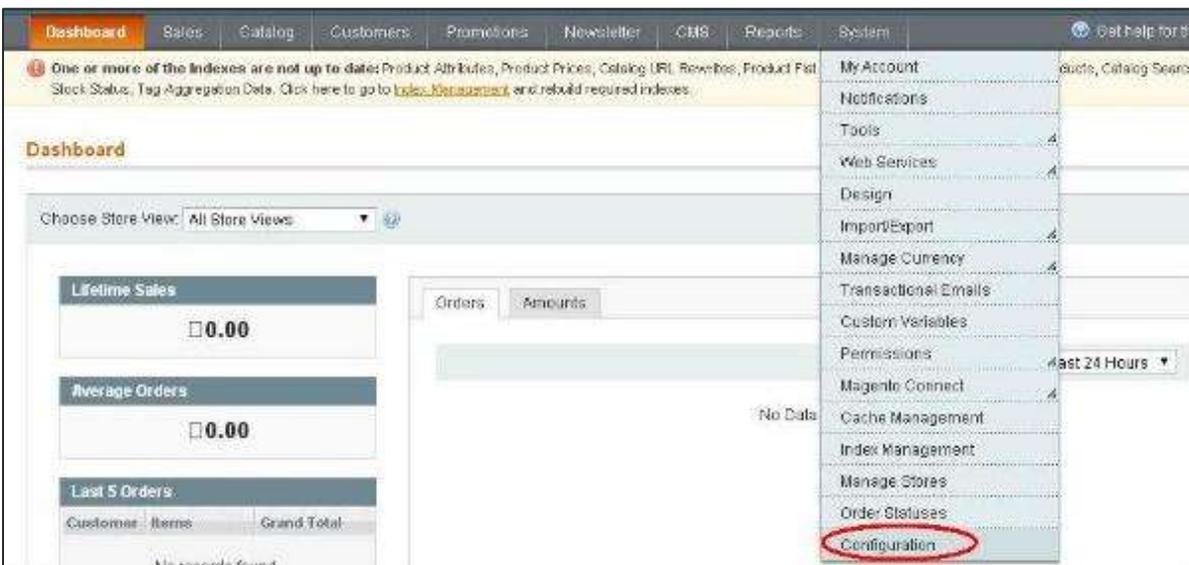
Step (8): You will get **Manage Stores** section to create store view as shown in the following screen.



Step (9): Click on **Create Store View** button and enter the information for Store, Name, Code, Status and Sort Order fields. Click on **Save Store View** button to store the view as shown in the following screen.



Step (10): To set up your stored language pack, go to the **System** menu and click on the **Configuration** option.



Step (11): Go to **Current Configuration Scope** section on the left side of the page and select the **Italian** option from the dropdown menu.



Step (12): Now under **General** section, click on **Locale Options**, uncheck the **Use Website** checkbox, select the **Italian (Italy)** option from the dropdown menu of **Locale** field and click on **Save Config** button.



This saves your language in Magento and selected language will be assigned in the selected store view.

6. Magento – Set Up Contact

Magento has built-in contact form which can be used for general contacts and can be found in the footer part of your Magento installation.

Following are the steps to create contact form in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **CMS** menu and click on the **Pages** option.



Step (3): Select the page which you would like to edit or else you can create the new page by clicking on **Add New Page** button.



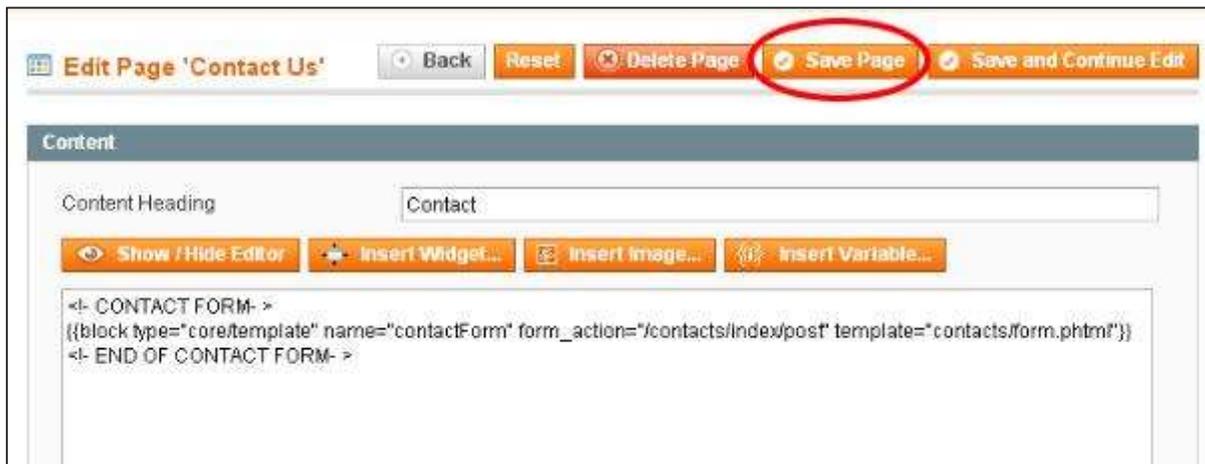
Step (4): Click on the **Content** option on the left side of page which will open the WYSIWYG editor and click on the **HTML** option that display **HTML Source Editor** window and paste the below code.

```
<!-- CONTACT FORM- >

{{block type="core/template" name="contactForm"
form_action="/contacts/index/post" template="contacts/form.phtml"}}

<!-- END OF CONTACT FORM- >
```

Step (5): Click on **Save Page** button and preview the created page to see the contact form.

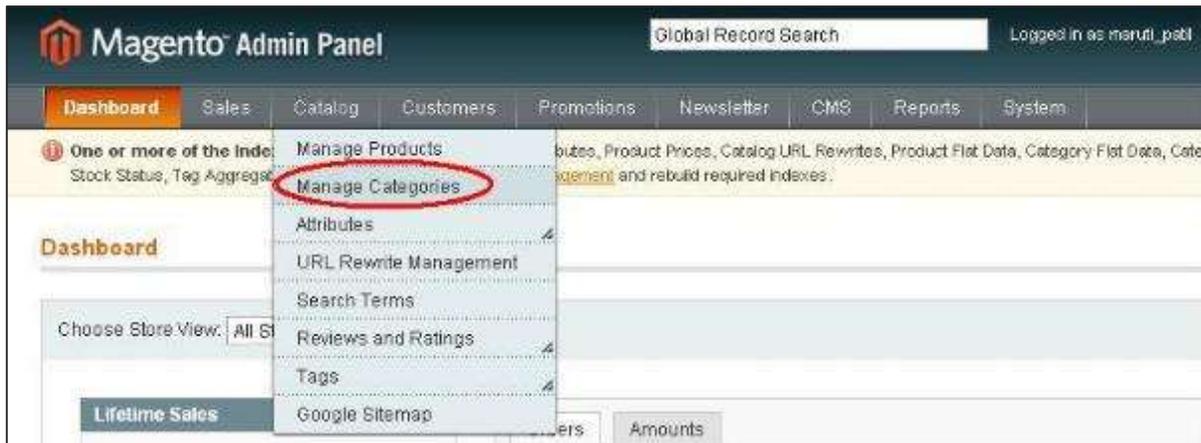


7. Magento – Set Up Categories

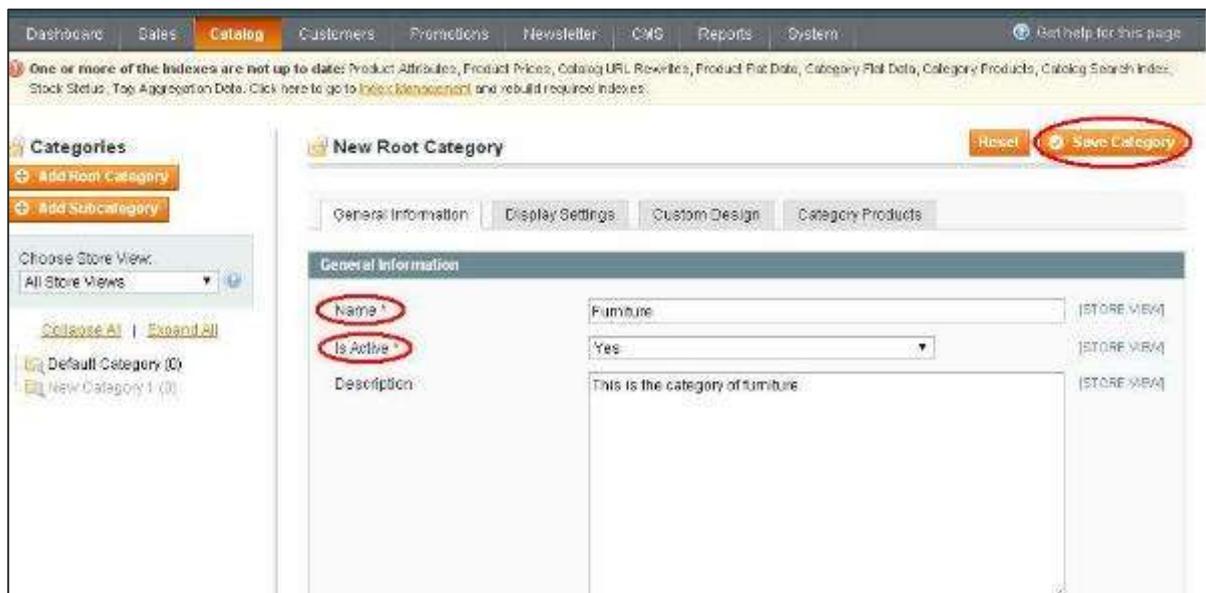
Categories are classes or things which are related, and have some shared characteristics. The following steps describe how to add categories for the products in Magento.

Step (1): Login to your Magento Admin Panel.

Step (2): Go to the **Catalog** menu and click on the **Manage Categories** option.



Step (3): Next you need to fill the fields like **Name** of the category, **Is Active** status which is set to **Yes/No** and **Description** of the category.



Step (4): Click on **Save Category** button and your category is ready to have the products added to it.

8. Magento – Set Up Products

Products are the items or things that are sold in Magento. You can add your products to the store view as per customers' needs. It includes both physical products and services.

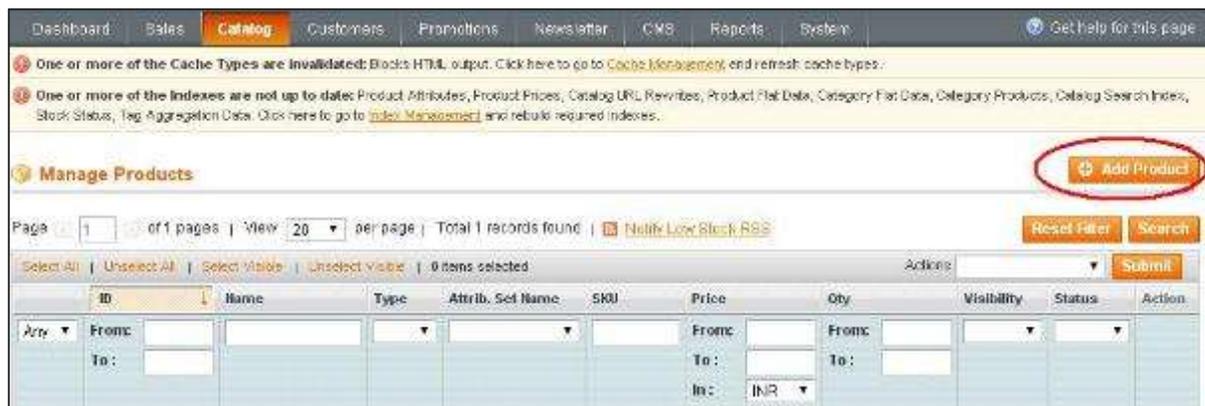
Magento provides an easy way to add your product quantities as described in the following steps:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Catalog** and select the **Manage Products** option from dropdown menu.



Step (3): Under **Manage Products** section, you will see a list of products, if you have added to your Magento store. If you want to add new product, click on the **Add Product** button on the page.



Step (4): Next select the Attribute Set and **Product Type**. There is no need to change anything just go ahead and click on **Continue** button.

The screenshot shows the 'New Product' form. At the top right, there are 'Back' and 'Reset' buttons. Below the title 'New Product', there is a section titled 'Create Product Settings'. This section contains two dropdown menus: 'Attribute Set' with 'Default' selected, and 'Product Type' with 'Simple Product' selected. Below these dropdowns, the 'Continue' button is highlighted with a red circle.

Step (5): Under **General** section, fill all the details such as Name of the product, Description, SKU (Stock Keeping Unit), Weight, Status, Visibility, etc. and then click on the **Save and Continue Edit** button.

The screenshot shows the 'General' section of the product form. At the top, there are buttons for 'Back', 'Reset', 'Delete', 'Duplicate', 'Save', and 'Save and Continue Edit', with the last one circled in red. The 'General' section includes a 'Create New Attribute' button. The form fields are as follows:

- Name ***: Input field with 'nike' and a '[STORE VIEW]' link.
- Description ***: Text area with 'nike' and a '[STORE VIEW]' link.
- Short Description ***: WYSIWYG Editor with the text 'This is the first product in magento' and a '[STORE VIEW]' link.
- SKU ***: Input field with '45698' and a '[GLOBAL]' link.
- Weight ***: Input field with '100.0000' and a '[GLOBAL]' link.
- Set Product as New from Date**: Input field with a calendar icon and a '[WEBSITE]' link.
- Set Product as New to Date**: Input field with a calendar icon and a '[WEBSITE]' link.
- Status ***: Dropdown menu with 'Enabled' selected and a '[WEBSITE]' link.
- URL Key**: Input field with 'nike' and a '[STORE VIEW]' link. Below it is a checked checkbox for 'Create Permanent Redirect for old URL'.
- Visibility ***: Dropdown menu with 'Catalog, Search' selected and a '[STORE VIEW]' link.
- Country of Manufacture**: Dropdown menu and a '[WEBSITE]' link.

Step (6): Enter the *Price and Tax Class* for your product and you can also add additional price using Group Price, Special Price and Tier Price options. Fill all the necessary fields and click on **Save and Continue Edit** button to proceed further.

New Product (Default) [Back] [Reset] [Save] **Save and Continue Edit**

Prices [Create New Attribute]

Price * [INR]
 ↑ This is a required field.

Group Price

Customer Group	Price	Action
[Add Group Price]		

Special Price [INR]

Special Price From Date [Calendar]

Special Price To Date [Calendar]

Tier Price

Customer Group	Qty	Price	Action
[Add Tier]			

Apply MAP

Display Actual Price

Manufacturer's Suggested Retail Price [INR]

Tax Class *
 ↑ This is a required field.

Step (7): If you want to see list of the saved products, just go to the **Catalog** and click on the **Manage Products** option.

Manage Products [Add Product]

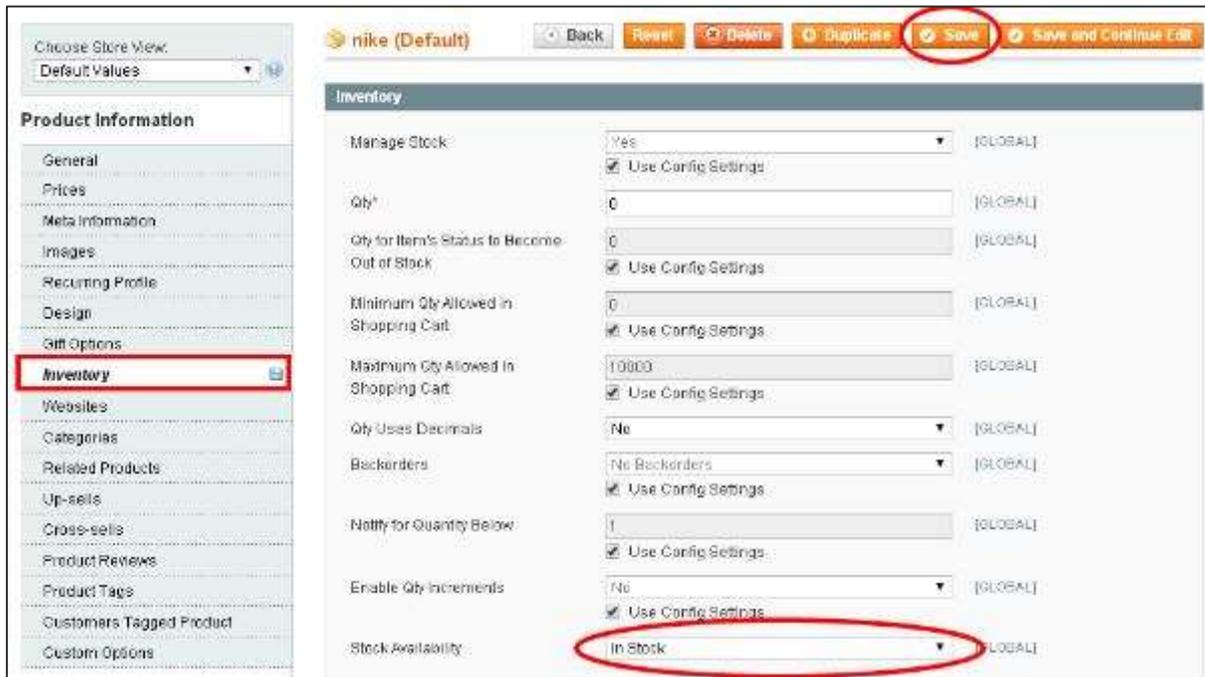
Choose Store View: All Store Views

Page 1 of 1 pages | View 20 per page | Total 2 records found | [Apply Low Stock RSS] [Reset Filter] [Search]

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected. Address: [Submit]

ID	Name	Type	Attrs. Set Name	SKU	Price	Qty	Visibility	Status	Websites	Action
2	nabil	Simple Product	Default	99888	₹20.00		9: Catalog, Search	Enabled	Main Website	[Edit]
1	nike	Simple Product	Default	45688	₹10.00		3: Catalog, Search	Enabled	Main Website	[Edit]

Step (8): You can customize the product information by clicking on the **Inventory** option on the left side. You can set quantity of the products, stock availability, etc. as shown in the screen. Then save the product by clicking on **save** button.

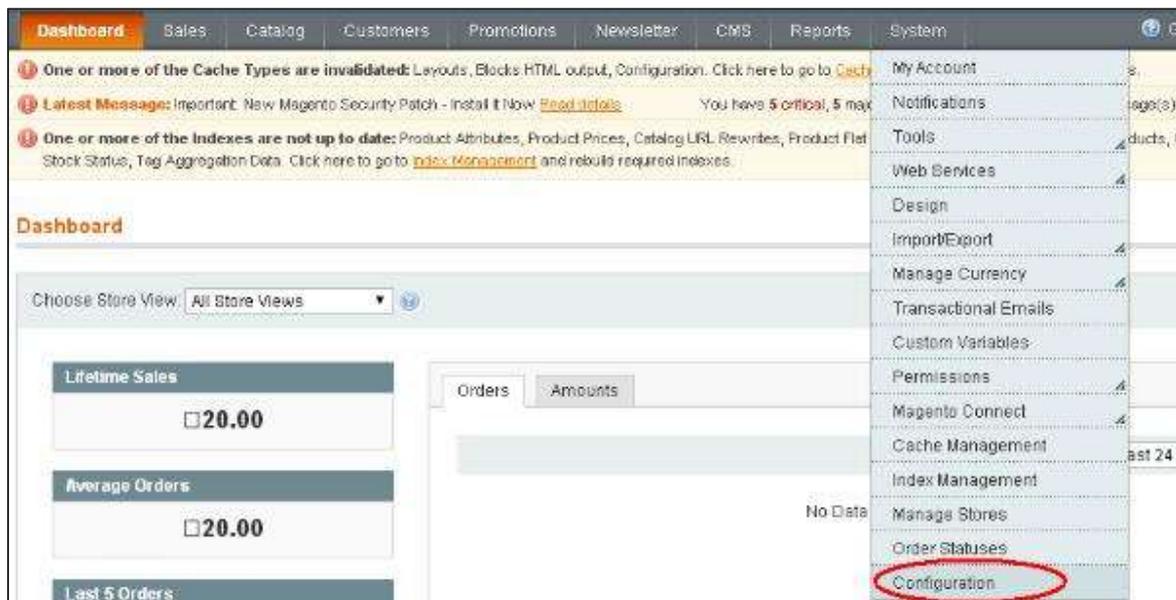


9. Magento – Set Up Inventory

Inventory allows setting a product's stock quantity. For instance, you have a product with 100 units in stock. If you set the stock availability to "Out of Stock" then it will force the item to be out of stock. We will see how to configure and manage the inventory settings in Magento.

Step (1): Login to your Magento Admin Panel.

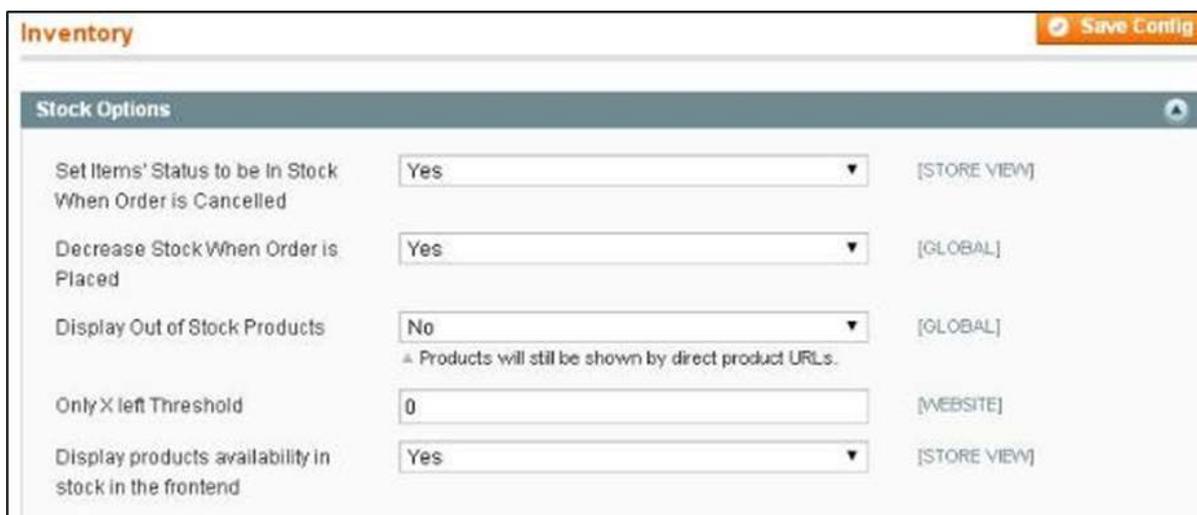
Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): Click on the **Inventory** option under the **Catalog** section on the left side of the screen which contains two panels **Stock Options** and **Product Stock Options** as shown in the following screen.



Step (4): The **Stock Options** panel pops up which contains some settings.



- **Set Items' Status to be In Stock When Order is Cancelled:** It displays the status of the item in the stock when order is cancelled. By default, it is set to **Yes**.
- **Decrease Stock When Order is Placed:** It indicates whether the stock quantity of the product should be reduced when an order is placed. By default, it is set to **Yes**, meaning it decreases the stock of the products when an order is placed.
- **Display Out of Stock Products:** As the name suggests, it displays the products which are out of stock. By default, stock products are not shown in the catalog. If you want the product to be visible to the customer, then set it to **Yes**.
- **Only X left Threshold:** It is used to set threshold number. When the units of that product have dropped to that number, it will display **Only X left** message on the product details page. By default, it is set to 0 which means it is disabled.
- **Display products availability in stock in the frontend:** It displays the availability of stock products by setting it to **Yes** option.

Step (5): Product Stock Options panel contains settings related to managing the stock of the products.

Inventory Save Config

Stock Options

Product Stock Options

Note that these settings are applicable to cart line items, not the whole cart.

Manage Stock:	<input type="text" value="Yes"/>	[GLOBAL]
Backorders:	<input type="text" value="No Backorders"/>	[GLOBAL]
Maximum Qty Allowed in Shopping Cart:	<input type="text" value="10000"/>	[GLOBAL]
Qty for Item's Status to Become Out of Stock:	<input type="text" value="0"/>	[GLOBAL]
Minimum Qty Allowed in Shopping Cart:	<input type="button" value="Add Minimum Qty"/>	[GLOBAL]
Notify for Quantity Below:	<input type="text" value="1"/>	[GLOBAL]
Enable Qty Increments:	<input type="text" value="No"/>	[GLOBAL]
Automatically Return Credit Memo Item to Stock:	<input type="text" value="No"/>	[GLOBAL]

- **Manage Stock:** By default, it is set to **Yes** which means it specifies the number of products per unit and it decreases the stock of the products when an order is placed.
- **Backorders:** By default, it is set to **No Backorders** option. If it is enabled, customers can buy products even if they are out of stock. If you want to allow backorders, then set this option to **Allow Qty Below 0** (customers are able to backorder the products) or **Allow Qty Below 0 and Notify Customer** (customers can backorder the products which will be notified on the shopping cart page of the frontend).
- **Maximum Qty Allowed in Shopping Cart:** It is used to set the maximum number of units per product that customer can order. This means customers can order the maximum allowed quantity from certain product. By default, it's set to 10000.
- **Minimum Qty Allowed in Shopping Cart:** It is used to set the minimum number of units per product that the customer is required to purchase.
- **Qty for Item's Status to Become Out of Stock:** It displays the message as "Out of Stock", when the quantity of the product becomes zero.
- **Notify for Quantity Below:** By default, it is set to 1 which notifies when stock of the product reaches one. If you enter 0, it will disable the option. You will be informing with RSS feeds. To do this, you need to go to **Catalog** menu > **Manage Products** and click on the link **Notify Low Stock RSS** as shown in the following screen.



When you click on the link, it will ask for admin username and password.

- **Enable Qty Increments:** By default, this option is disabled. If you set this option to **Yes**, a field labeled **Qty Increments** will appear just under it. You can type the number of products that make up a quantity increment.
- **Automatically Return Credit Memo Item to Stock:** By default the products in the order are not returned to stock. If you want items from orders that you refund to be returned to stock, set the option to **Yes**.

Fill all information in the respective fields and click on the **Save Config** button.

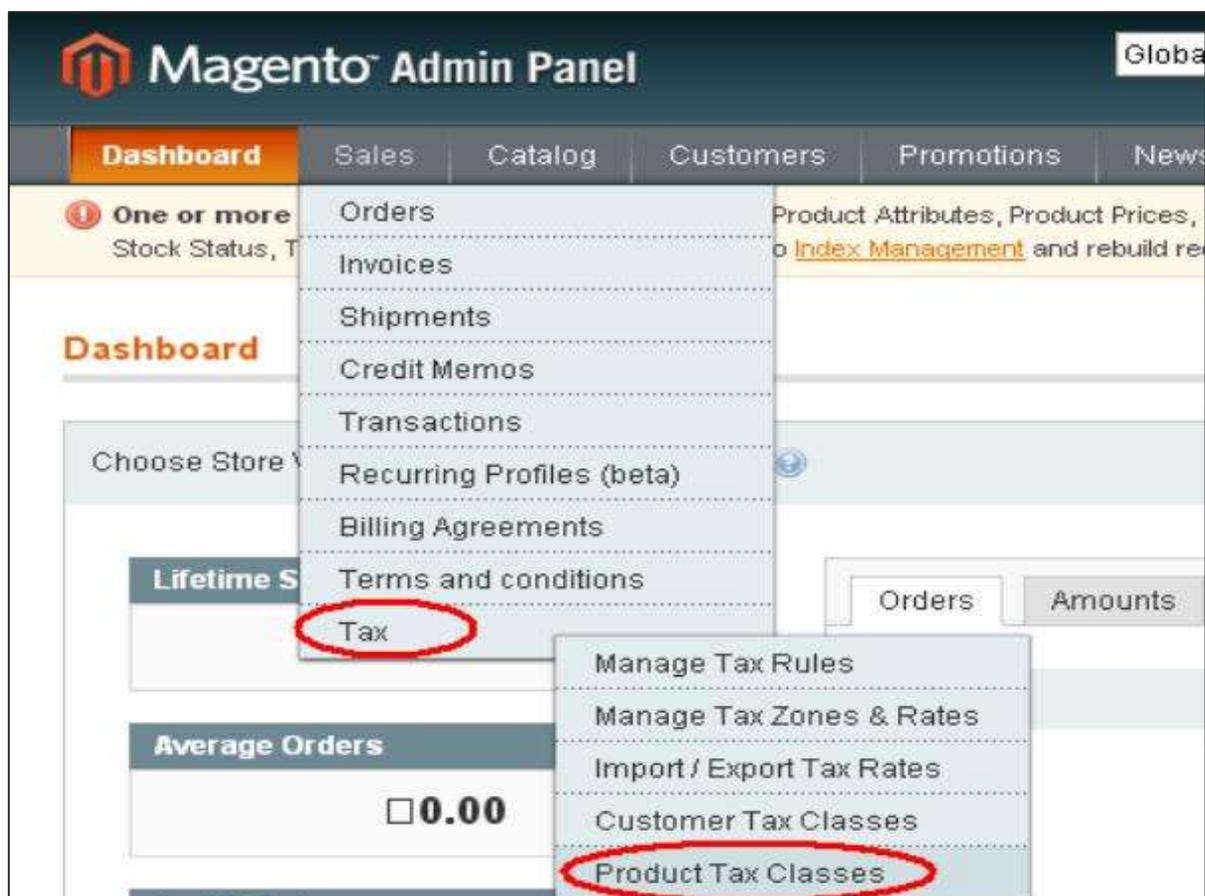
10. Magento – Set Up Taxes

Magento allows to set up different tax classes and tax rates, and bringing them together into tax rules. You can also define product tax classes and assign them to products. Tax rules are combination of product tax class, customer tax class, tax rates, shipping address and amount of purchase.

The following steps describe how to add and manage tax classes in Magento.

Step (1): Login to your Magento admin panel.

Step (2): Go to **Sales** menu > **Tax** and click on the **Product Tax Classes** option.



Step (3): Product class is a type of product that is being purchased. It includes two product tax classes: **Taxable Goods** and **Shipping**. To add new product tax class, click on **Add New** button as shown in the following screen.



Step (4): Now enter the name for your product tax class in the **Class Name** box and click on the **Save Class** button on the upper right corner.



Set Up Tax Rates

Tax rate is a combination of tax zone (such as country, state or zip) and percentage. You can set up tax rates as shown in the following steps.

Step (1): Login to Magento Admin Panel.

Step (2): Go to **Sales** menu > **Tax** and click on the **Manage Tax Zones & Rates** option.



Step (3): Under **Manage Tax Rates** window, click on the **Add New Tax Rate** button.



Step (4): It provides several options such as:

- **Tax Identifier** field defines the title of the newly created tax rate.
- **Country and State** fields describes the country and state to which the specific tax applies. You can select country and state from the dropdown options given.
- **Zip/Post is range (set to Yes)** field which provides two fields, i.e. *Range From* and *Range To*. These fields show the starting and ending of ZIP code range.
- **Rate Percent** specifies the percent of the tax rate.

After completing the settings, click on the **Save Rate** button.



Set Up Tax Rules

Tax rules are entities that combine product tax classes, customer tax classes and tax rates. Without setting up tax rules, taxes will not be applied. It determines how tax will be applied on each order that is placed in the store.

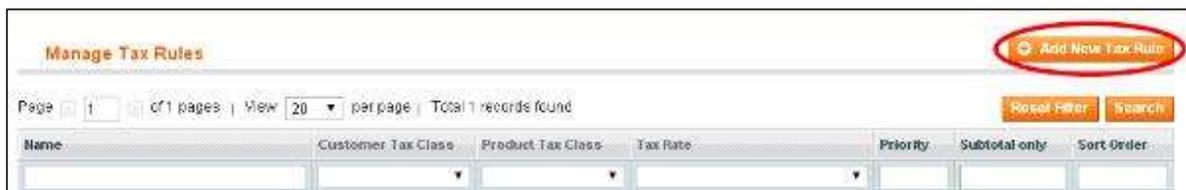
The following steps describe how to add tax rules for products in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Sales** menu > **Tax** and click on the **Manage Tax Rules** option.



Step (3): To add new tax rule, click on the **Add New Tax Rule** button in the top right corner.

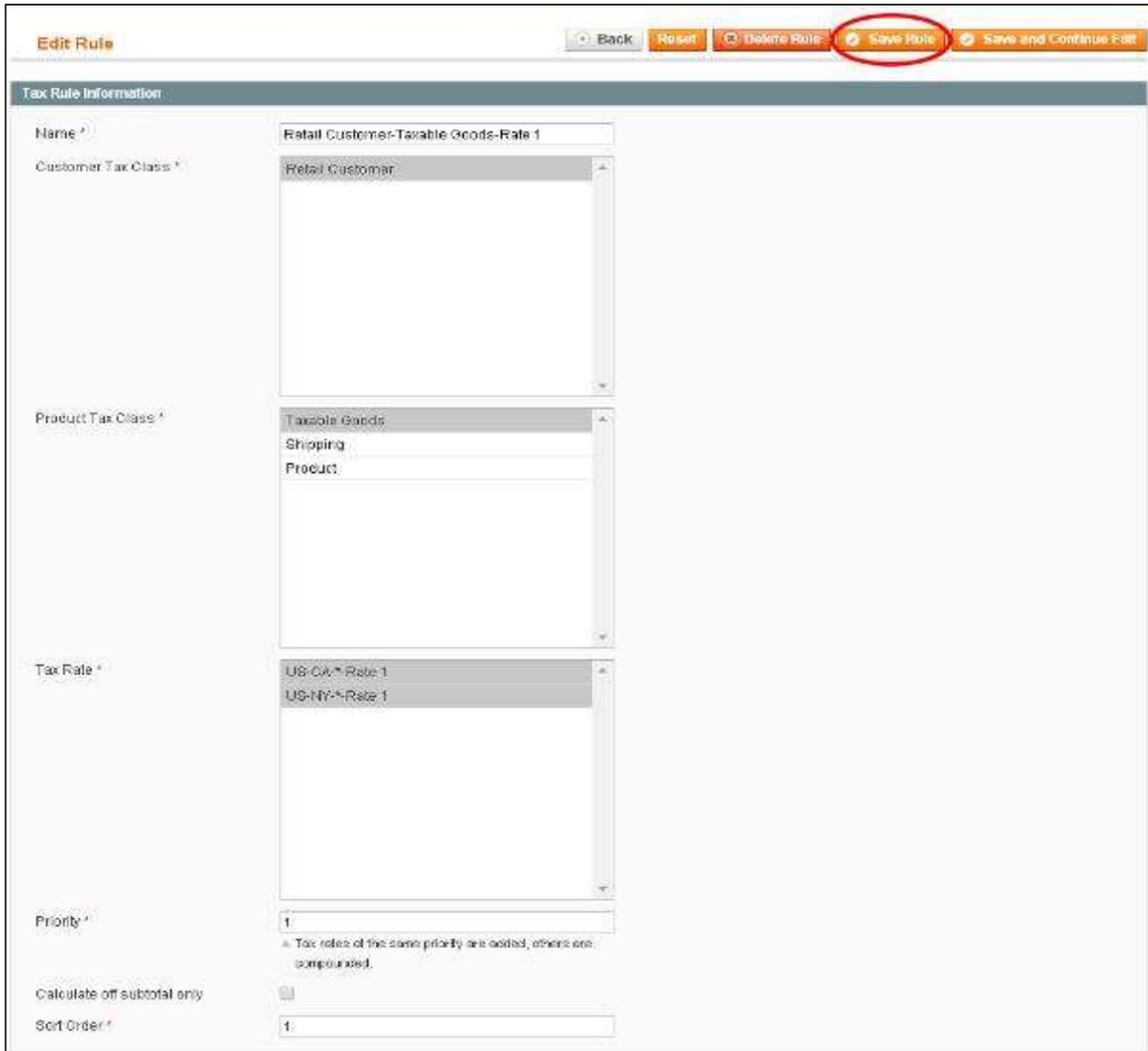


Step (4): It contains some settings such as:

- **Name** field specifies name for tax rule
- **Customer Tax Class** field displays the list of customer tax classes that you have created
- **Product Tax Class** field displays the list of product tax classes that you have created
- **Tax Rate** field selects the tax rate which you want to apply to this rule

- **Priority** field specifies when the tax should be applied to other tax rules
- **Sort Order** field displays the order in which tax rules should be displayed

After completing the settings, click on the **Save Rule** button.



Import/Export Tax Rates

Magento provides support for exporting and importing tax rates to the webstore. You can set up different tax percentages settings per different zip code. You can edit the rates in excel and import them back.

The following steps describe how to Import/Export tax rates in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Sales** menu > **Tax** and click on the **Import/Export Tax Rates** option.



Step (3): It will display the window as shown in the following screen.



Step (4): When you click on the **Export Tax Rates** button, it will download the file as shown in the following screen.

	A	B	C	D	E	F	G	H	I
1	Code	Country	State	Zip/Post Code	Rate	Zip/Post is Range	Range From	Range To	default
2	US-CA-* -Rate 1	US	CA	*	8.25				
3	US-NY-* -Rate 1	US	NY	*	8.375				
4									
5									
6									
7									
8									
9									
10									
11									
12									

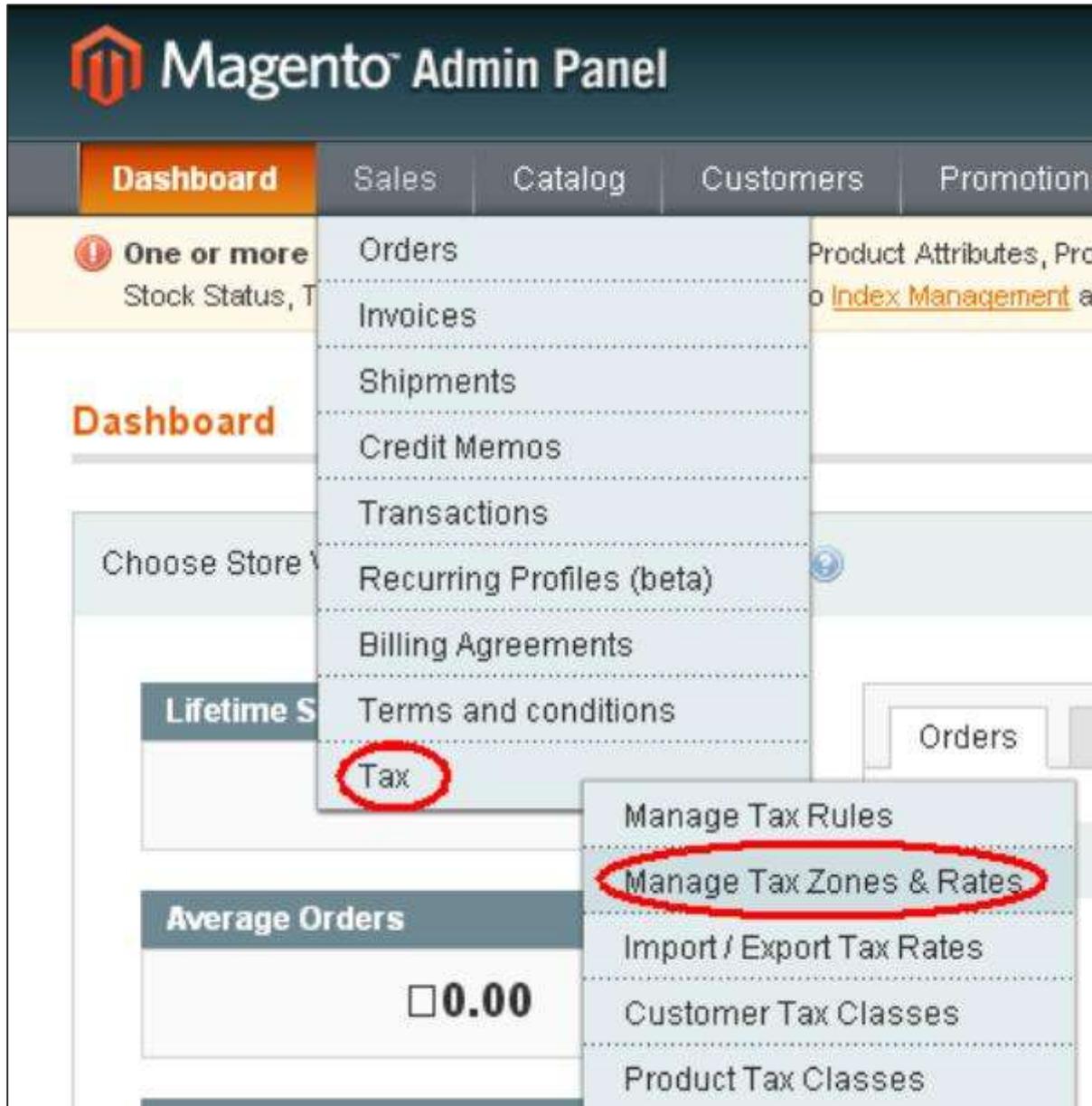
The spreadsheet includes Code, Country, State, Zip/Post Code, Rate, Zip/Post is Range, Range From, Range To and Default columns. For instance, while installing Magento, there is one tax rate for the New York. The **US-NY-***-Rate 1**** means tax rate number 1 for New York which is 8.375 percent.

Step (5): You can edit the file and import the tax rates into your Magento store by going to **Sales** menu > **Tax** and click on the **Import/Export Tax Rates** option.



Click on the **Choose File** button to locate the CSV file from your computer and click the **Import Tax Rates** button.

Step (6): On the Admin menu, go to **Sales** menu > **Tax** and click on the **Manage Tax Zones & Rates** option. The imported data appears as shown in the following screen.



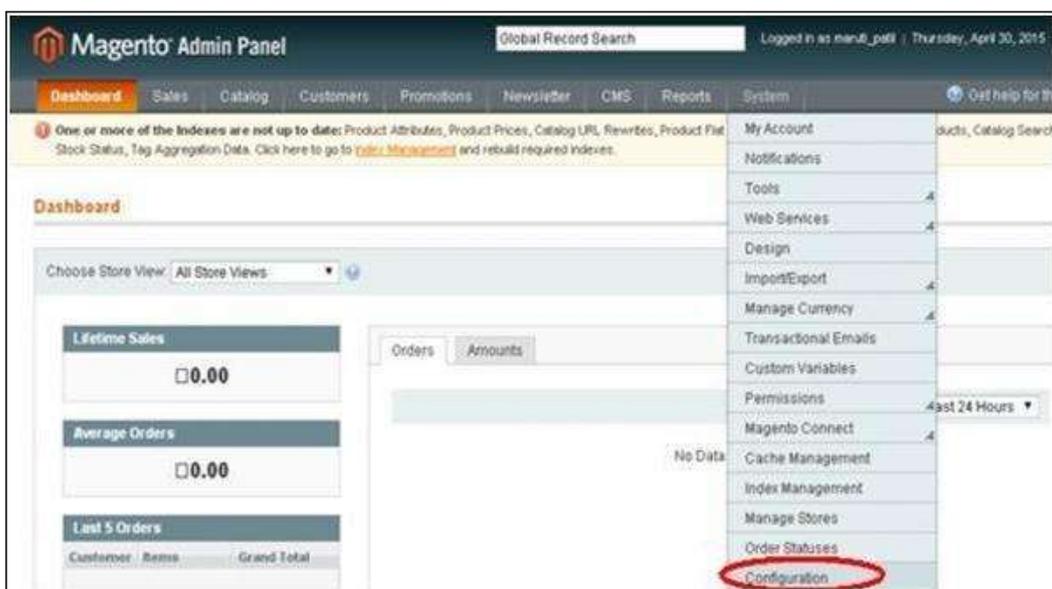
11. Magento – Set Up Shipping Rates

In online business, selling of physical products to customers should have flexible and scalable shipping policies. Magento is a friendly system for business needs including shipment rates.

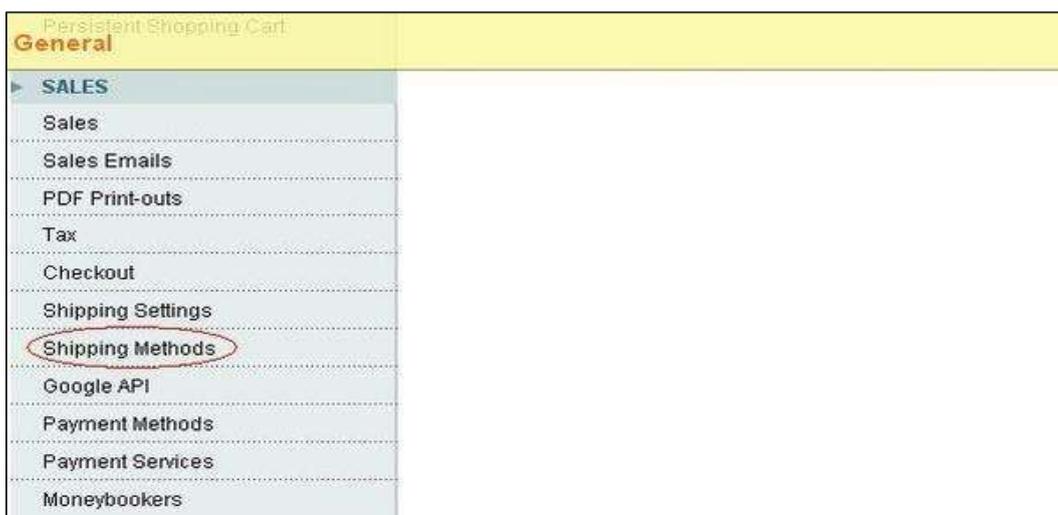
The following steps describe how to setup shipping rates in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to the **System** menu and click on the **Configuration** option.



Step (3): On the left side of the navigation bar, click on the **Shipping Methods** under **Sales** section.



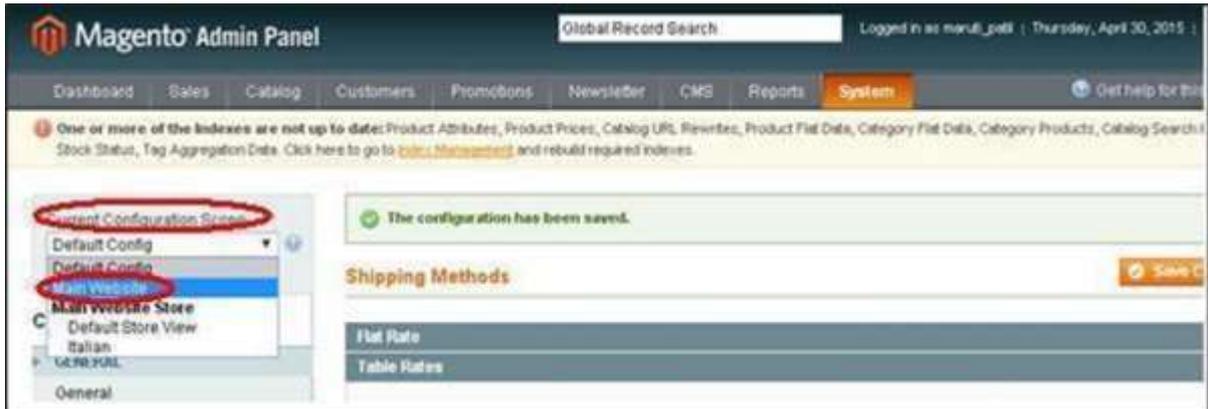
Step (4): Then expand the **Table Rates** section, enable the table rates by selecting **Yes** from the dropdown menu for the **Enabled** field. It will turn off flat rate shipping and allow you to specify different rates based on chosen criteria.

Step (5): Fill all the required fields as shown in the following screen and click on the **Save Config** button. It will save your current configuration into Magento.

The screenshot shows the 'Shipping Methods' configuration page in Magento. The 'Table Rates' section is expanded. The 'Save Config' button is circled in red. The configuration fields are as follows:

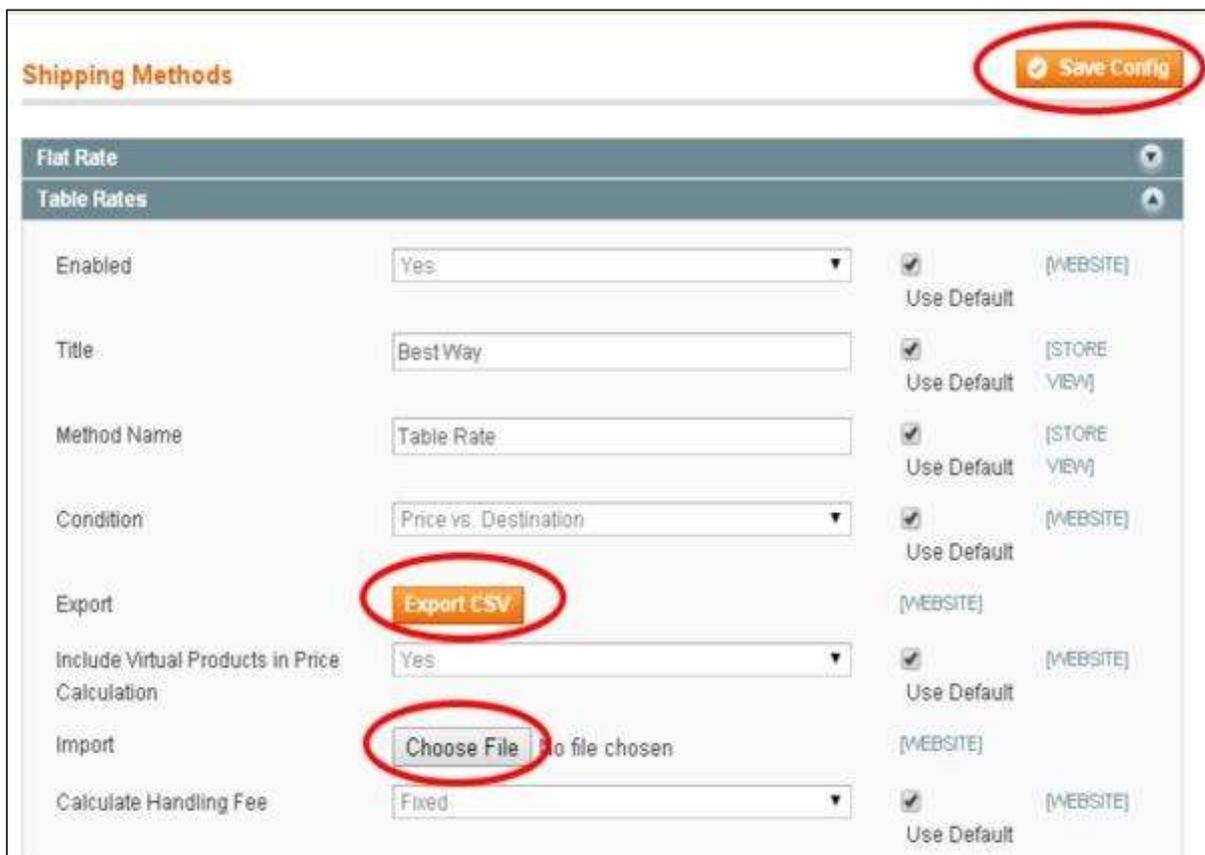
Field	Value	Scope
Enabled	Yes	[WEBSITE]
Title	Best Way	[STORE VIEW]
Method Name	Table Rate	[STORE VIEW]
Condition	Price vs. Destination	[WEBSITE]
Include Virtual Products in Price Calculation	Yes	[WEBSITE]
Calculate Handling Fee	Fixed	[WEBSITE]
Handling Fee		[WEBSITE]
Displayed Error Message	This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.	[STORE VIEW]
Ship to Applicable Countries	All Allowed Countries	[WEBSITE]
Ship to Specific Countries	Bermuda, Bhutan, Bolivia, Bosnia and Herzegovina, Botswana, Bouvet Island, Brazil, British Indian Ocean Territory, British Virgin Islands, Brunei	[WEBSITE]
Show Method if Not Applicable	No	[WEBSITE]
Sort Order		[WEBSITE]

Step (6): If you want to modify the fields of table rates section, go to **Current Configuration Scope** menu in the top left corner and select the **Main Website** option from dropdown menu.



Step (7): Magento allows to view or generate and download different reports. Magento has integrated tools for CSV files generation. You can create the shipping rates in a spreadsheet and then import them to your website. Click on the **Export CSV** button to download the template. Upload the file into Magento by clicking on the **Choose File** button next to the import option.

Step (8): After uploading the file, click on the **Save Config** button on the top right corner to save the table rates.



Step (8): The CSV structure will look as shown in the following screen:

A	B	C	D	E
Country	Region/State	Zip/Postal Code	Weight (and above)	Shipping Price

The first column specifies the country where the shipping rate will apply, second column specifies the region/state within that country, third column specifies the postal code of the region/state, fourth and fifth columns determine the price for the shipping rate in which these values represent whatever currency you have set for your webstore.

After completing this process, save the file and import it into your Magento webstore by using the **Import** button.

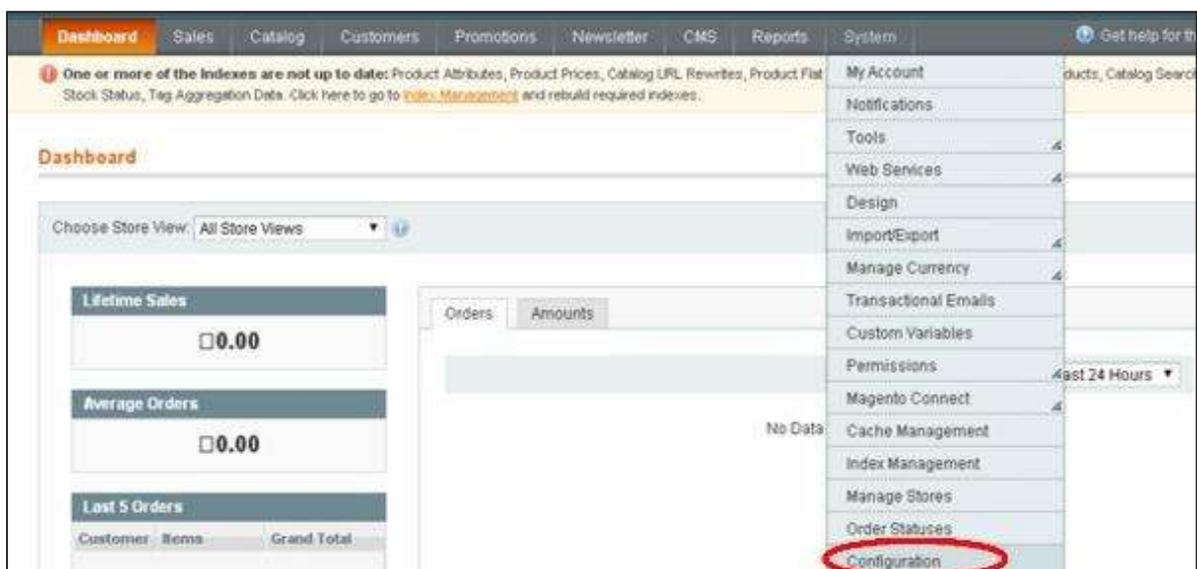
12. Magento – Set Up Payment Plans

PayPal is a secure way for customers to pay online. This chapter explains how to set up payment methods in Magento. With PayPal and Magento, you can accept payments from credit cards, debit cards and PayPal account holders.

The following steps describe how to set up payments plans in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **System** menu and click on the **Configuration** option.



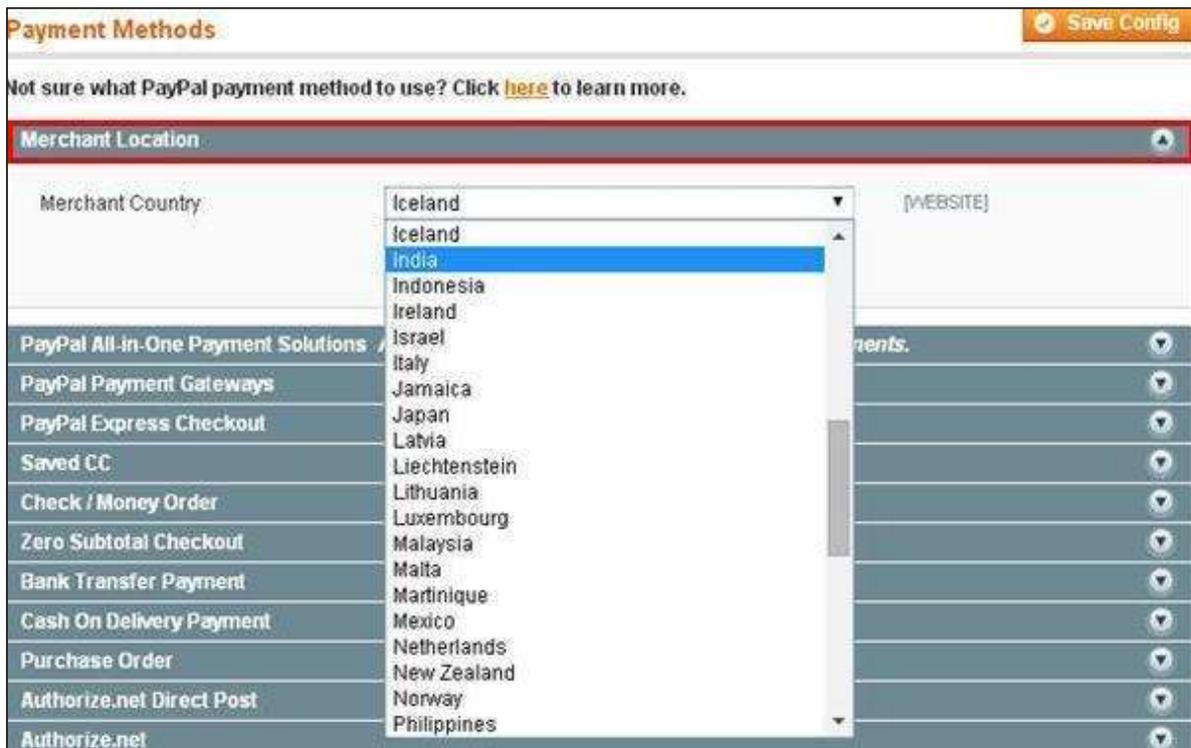
Step (3): On the left side of the navigation bar, click on the **Payment Methods** under **Sales** section.



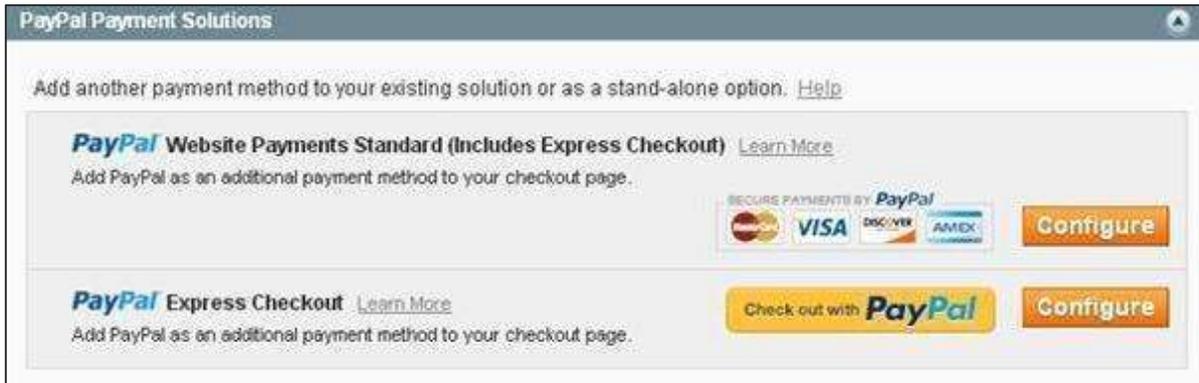
In some of the payment methods, there are some common settings as specified:

- **Enabled:** This option is used to enable or disable the payment method.
- **Title:** It specifies the title for the payment method which will display during customer checkout and inside order e-mails and summaries.
- **New Order Status:** It represents the status of an order after processing of payment. It will display either **Pending** or **Processing** choices.
- **Sort Order:** During checkout mechanism, it displays the position of the payment method in the list of all the payment choices.
- **Payment Applicable From:** It selects payment from all or some specific countries in which countries will offer the payment method you are configuring.
- **Minimum Order Total:** It specifies minimum order amount available for the products order.
- **Maximum Order Total:** It specifies maximum order amount available for the products order.

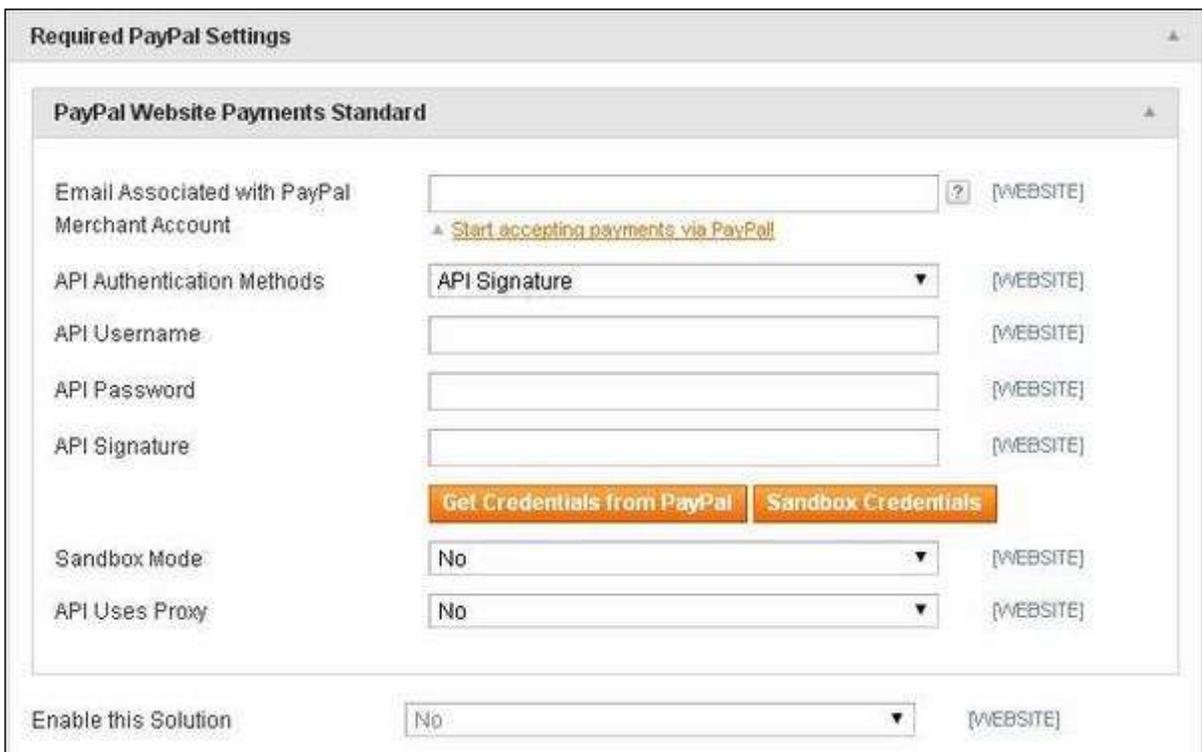
Step (4): Next, under **Merchant Location** panel, set the merchant country from the dropdown menu.



Step (5): It provides following types of payment methods which adds PayPal as additional payment method to your checkout page.



Step (6): You can click on the **Configure** button to make PayPal settings. Fill the e-mail field with e-mail address which is associated with PayPal merchant account for accepting the payments and along with all other required fields.



Step (7): The following screen shows you the Basic and Advanced settings of PayPal payments.

Basic Settings - PayPal Payments Standard		
Title	PayPal Express Checkout	[STORE VIEW]
	* It is recommended to set this value to "PayPal" per store views.	
Sort Order		[STORE VIEW]
Payment Action	Authorization	[WEBSITE]
Display on Product Details Page	Yes	[STORE VIEW]
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]

Step (8): Under **Basic Settings**, enter *Title* for the payment method, *Sort Order* option used to sort payment methods in the checkout page. *Payment Action* section offers to select either Sale or Authorization or Order which defines how the payment will be processed in the PayPal payment system. Under **Advanced Settings**, select the *Payment Applicable From* option as All Allowed Countries and similarly fill all other required fields.

Step (9): Next panel is **Saved CC** which provides credit card payments on your website.

Merchant Location		
PayPal Payment Solutions		
Saved CC		
Enabled	Yes	[WEBSITE]
Title	Credit Card (saved)	[STORE VIEW]
New Order Status	Pending	[WEBSITE]
Credit Card Types	<ul style="list-style-type: none"> American Express Visa MasterCard Discover JCB Switch/Maestro Solo Other 	[WEBSITE]
Request Card Security Code	No	[WEBSITE]
3D Secure Card Validation	No	[WEBSITE]
Payment from Applicable Countries	All Allowed Countries	[WEBSITE]

- **Credit Card Types:** It allows for selecting credit card types for the payment processing.
- **Request Card Security Code:** It asks for the credit card's security code which makes fraud little harder by setting it to Yes.
- **3D Secure Card Validation:** It is an additional security functionality where customer needs to provide credit card password to complete the purchase order.

Step (10): Next is the **Check/Money Order** panel.

The screenshot shows the 'Check / Money Order' configuration panel. It has a title bar with 'PayPal Payment Solutions', 'Saved CC', and 'Check / Money Order'. The main content area contains the following fields:

- Enabled:** A dropdown menu set to 'Yes'. To its right is a '[WEBSITE]' label.
- Title:** A text input field containing 'Check / Money order'. To its right is a '[STORE VIEW]' label.
- New Order Status:** A dropdown menu set to 'Pending'. To its right is a '[WEBSITE]' label.
- Payment from Applicable Countries:** A dropdown menu set to 'All Allowed Countries'. To its right is a '[WEBSITE]' label.
- Payment from Specific Countries:** A multi-select list box containing the following countries: Panama, Angola, Anguilla, Antarctica, Antigua and Barbuda, Argentina, Armenia, Aruba, Australia, and Austria. To its right is a '[WEBSITE]' label.
- Make Check Payable to:** An empty text input field. To its right is a '[STORE VIEW]' label.

Set the values for **Make Check Payable to** and **Send Check to** options.

Step (11): The **Zero Subtotal Checkout** panel is a payment option that displays when order total is zero and not required to enter payment details for the customer.

The screenshot shows the 'Zero Subtotal Checkout' configuration panel. It has a title bar with 'Check / Money Order' and 'Zero Subtotal Checkout'. The main content area contains the following fields:

- Title:** A text input field containing 'No Payment Information Required'. To its right is a checked checkbox 'Use Default' and a '[STORE VIEW]' label.
- Enabled:** A dropdown menu set to 'Yes'. To its right is a checked checkbox 'Use Default' and a '[WEBSITE]' label.
- New Order Status:** A dropdown menu set to 'Pending'. To its right is a checked checkbox 'Use Default' and a '[WEBSITE]' label.
- Payment from Applicable Countries:** A dropdown menu set to 'All Allowed Countries'. To its right is a checked checkbox 'Use Default' and a '[WEBSITE]' label.
- Payment from Specific Countries:** A multi-select list box containing the following countries: Afghanistan, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda, and Argentina. To its right is a checked checkbox 'Use Default' and a '[WEBSITE]' label.
- Sort Order:** A text input field containing '1'. To its right is a checked checkbox 'Use Default' and a '[WEBSITE]' label.

Step (12): The **Bank Transfer Payment** panel contains one specific field called **instructions** which allows to enter bank account details that customer needs to transfer money to you.

Bank Transfer Payment		
Enabled	No	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Title	Bank Transfer Payment	<input checked="" type="checkbox"/> Use Default [STORE VIEW]
New Order Status	Pending	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Payment from Applicable Countries	All Allowed Countries	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Payment from Specific Countries	<ul style="list-style-type: none"> Argentina Armenia Azores Australia Austria Azerbaijan Bahrain Bangladesh Barbados 	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Instructions	<div style="border: 1px solid #ccc; height: 100px;"></div>	<input checked="" type="checkbox"/> Use Default [STORE VIEW]
Minimum Order Total		<input checked="" type="checkbox"/> Use Default [WEBSITE]
Maximum Order Total		<input checked="" type="checkbox"/> Use Default [WEBSITE]
Sort Order		<input checked="" type="checkbox"/> Use Default [WEBSITE]

Step (13): The **Cash on Delivery Payment** panel also contains one specific field called **instructions** which allows to list information related to the cash on delivery payment.

Cash On Delivery Payment		
Enabled	No	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Title	Cash On Delivery	<input checked="" type="checkbox"/> Use Default [STORE VIEW]
New Order Status	Pending	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Payment from Applicable Countries	All Allowed Countries	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Payment from Specific Countries	<ul style="list-style-type: none"> Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia Aruba Australia Austria 	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Instructions		<input checked="" type="checkbox"/> Use Default [STORE VIEW]
Minimum Order Total		<input checked="" type="checkbox"/> Use Default [WEBSITE]
Maximum Order Total		<input checked="" type="checkbox"/> Use Default [WEBSITE]
Sort Order		<input checked="" type="checkbox"/> Use Default [WEBSITE]

Step (14): The **Purchase Order** panel contains same options.

Purchase Order		
Enabled	No	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Title	Purchase Order	<input checked="" type="checkbox"/> Use Default [STORE VIEW]
New Order Status	Pending	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Payment from Applicable Countries	All Allowed Countries	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Payment from Specific Countries	<ul style="list-style-type: none"> Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia Aruba Australia Austria 	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Minimum Order Total		<input checked="" type="checkbox"/> Use Default [WEBSITE]
Maximum Order Total		<input checked="" type="checkbox"/> Use Default [WEBSITE]
Sort Order		<input checked="" type="checkbox"/> Use Default [WEBSITE]

Step (15): The **Authorize.net Direct Post** panel contains some other options such as setting the payment action, API login ID for authorization, setting the transaction key and merchant name, setting the test mode to Yes/No, Gateway URL of authorization, setting the accepting currency, e-mail of customer and merchant, types of credit card used for purchase, and enable or disable the credit card verification as shown in the following screen.

Authorize.net Direct Post		
Enabled	No	<input checked="" type="checkbox"/> Use Default WEBSITE
Payment Action	Authorize Only	<input checked="" type="checkbox"/> Use Default WEBSITE
Title	Credit Card Direct Post (Authorize.net)	<input checked="" type="checkbox"/> Use Default STORE VIEW
API Login ID		<input checked="" type="checkbox"/> Use Default WEBSITE
Transaction Key		<input checked="" type="checkbox"/> Use Default WEBSITE
Merchant MD5		<input checked="" type="checkbox"/> Use Default WEBSITE
New Order Status	Processing	<input checked="" type="checkbox"/> Use Default WEBSITE
Test Mode	Yes	<input checked="" type="checkbox"/> Use Default WEBSITE
Gateway URL	https://secure.authorize.net/gateway/transact.dll	<input checked="" type="checkbox"/> Use Default WEBSITE
Accepted Currency	US Dollar	<input checked="" type="checkbox"/> Use Default WEBSITE
Debug	No	<input checked="" type="checkbox"/> Use Default WEBSITE
Email Customer	No	<input checked="" type="checkbox"/> Use Default WEBSITE
Merchant's Email		<input checked="" type="checkbox"/> Use Default WEBSITE
Credit Card Types	<ul style="list-style-type: none"> American Express Visa MasterCard Discover Other 	<input checked="" type="checkbox"/> Use Default WEBSITE
Credit Card Verification	No	<input checked="" type="checkbox"/> Use Default WEBSITE

Step (16): The **Authorize.net** panel works similar to the **Authorize.net Direct Post** panel, with the only difference being it allows to enable or disable the 3D secure card validation on the credit cards, which makes fraud little harder by setting it to Yes.

Payment from Applicable Countries	All Allowed Countries	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Credit Card Verification	No	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Payment from Specific Countries	<ul style="list-style-type: none"> ▲ Afghanistan ▼ Albania ▼ Algeria ▼ American Samoa ▼ Andorra ▼ Angola ▼ Argentina ▼ Armenia ▼ Aruba ▼ Australia ▼ Austria ▼ Azerbaijan ▼ Bahamas and The ▼ Bahrain 	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Minimum Order Total	<input type="text"/>	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Maximum Order Total	<input type="text"/>	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Sort Order	<input type="text"/>	<input checked="" type="checkbox"/> Use Default [WEBSITE]
Allow Partial Authorization	No	<input checked="" type="checkbox"/> Use Default [WEBSITE]
3D Secure		
3D Secure Card Validation	No	<input checked="" type="checkbox"/> Use Default [WEBSITE]

Step (17): After you are done with the settings, click on the **Save Config** button on the top right corner of the page to save your payment methods.

Payment Methods Save Config

Not sure what PayPal payment method to use? Click [here](#) to learn more.

Merchant Location

Merchant Country [WEBSITE]

▲ If not specified, Default Country from General Config will be used

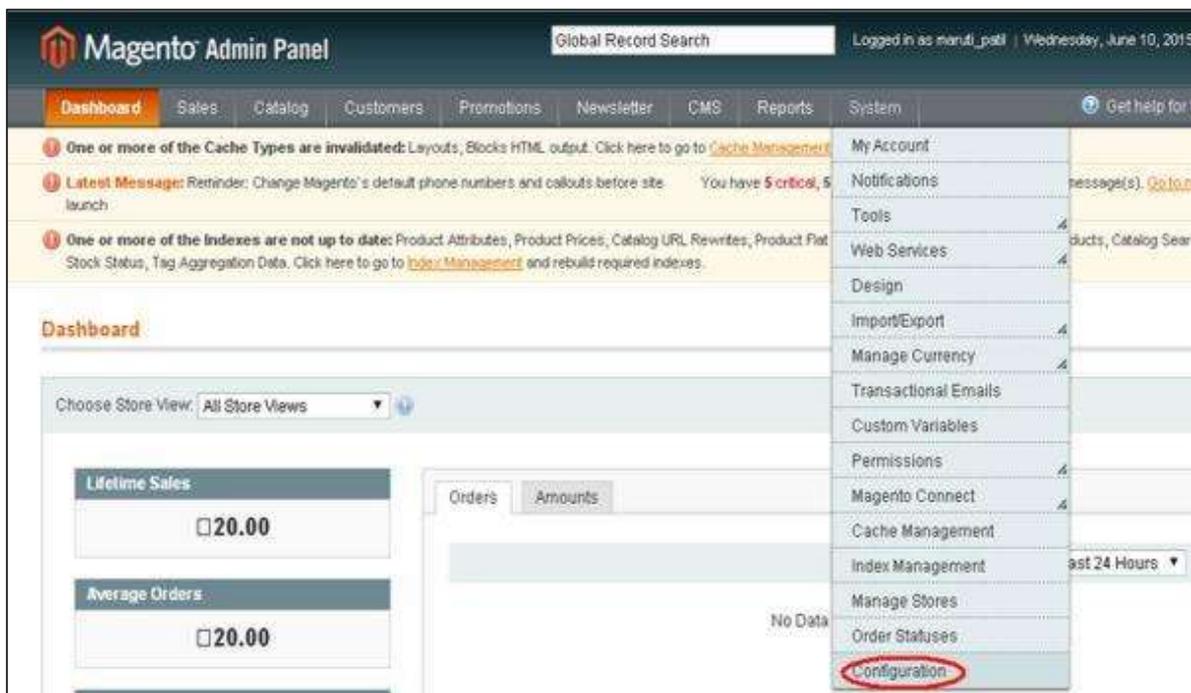
13. Magento – Set Up Payment Gateway

Payment gateway processes the credit card data securely between the customer and the merchant and also between the merchant and the payment processor. It is like a checkpoint that protects against attempting to gather personal and financial information from customers and also acts as a mediator between the merchant and the sponsoring bank.

The following steps describe how to set up payment gateway in Magento:

Step (1): Login to your Magento Admin Panel.

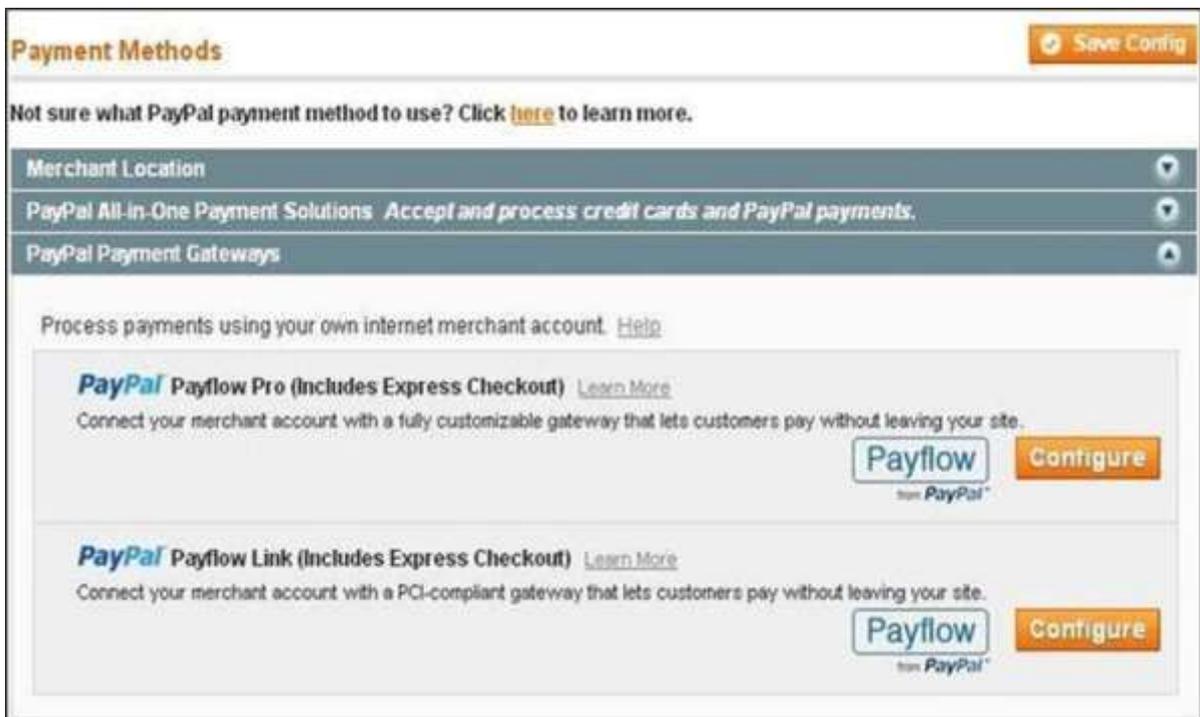
Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): Next you will see some list of options on the left side of the page. Scroll down and go to the **Sales** section and click on the **Payment Methods** option.



Step (4): Under the **Payment Methods** section, expand the **PayPal Payment Gateways** option. It provides two types of payment gateway methods; one is **Payflow Pro (Includes Express Checkout)** and **Payflow Link (Includes Express Checkout)**. Click on the **Configure** button to enter details for Payflow Pro and Payflow Link options respectively.



The **Payflow Pro** option is a customizable payment gateway, which can be used with merchant account to process credit card transactions. It does not need PayPal account as they can enter their credit card information directly on site and you need to add API credentials in Magento admin panel. It is also used to process PayPal Express Checkout (it allows customers to pay by credit card or from the security of their personal PayPal accounts) transactions.

Under **Payflow Link** option, once the customer decides to checkout, the checkout process is carried out on PayPal site. It is often called as hosted payment gateway that keeps the customer on your site by providing fast and easy way to add transaction processing to your site.

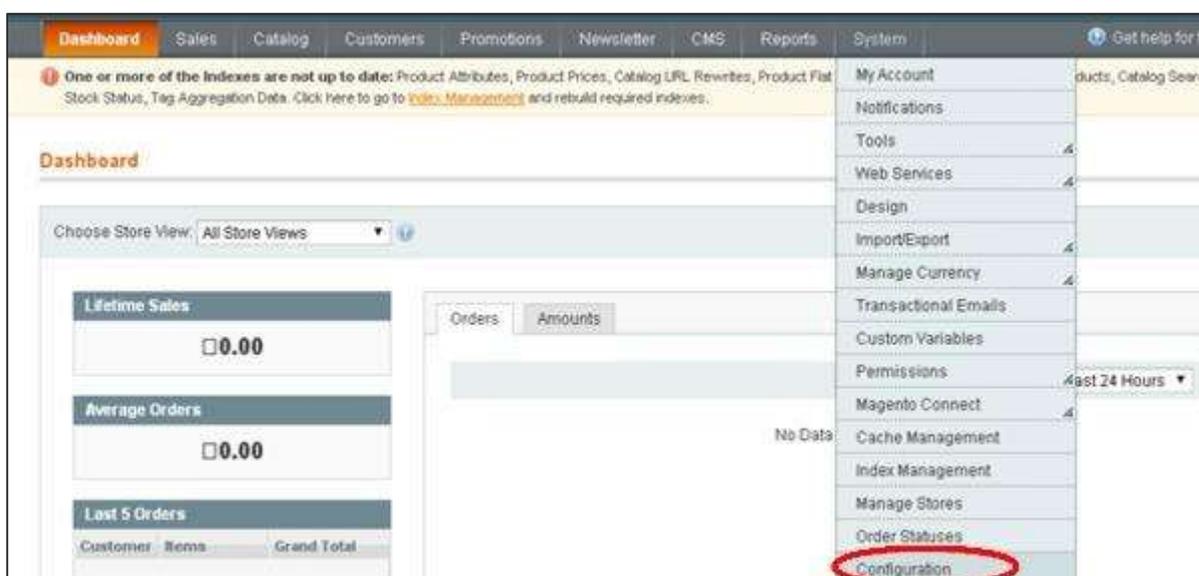
14. Magento – Set Up Payment Methods

This article explains how to set up payment methods in Magento and also shows how to configure Magento to use PayPal as payment processor for both credit cards and PayPal payments.

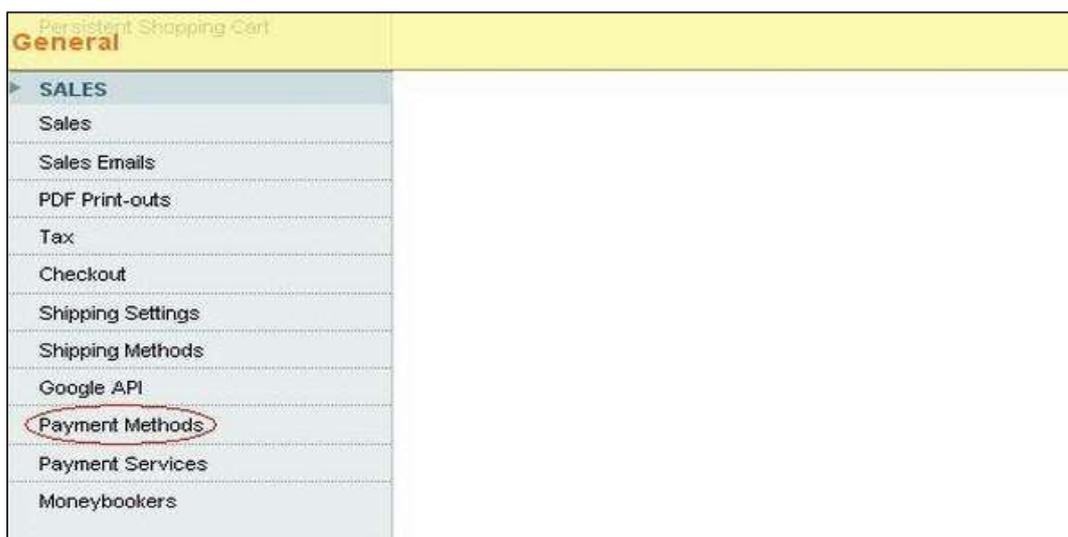
The following steps describe how to set up payments in Magento:

Step (1): Login to your Magento Admin Panel.

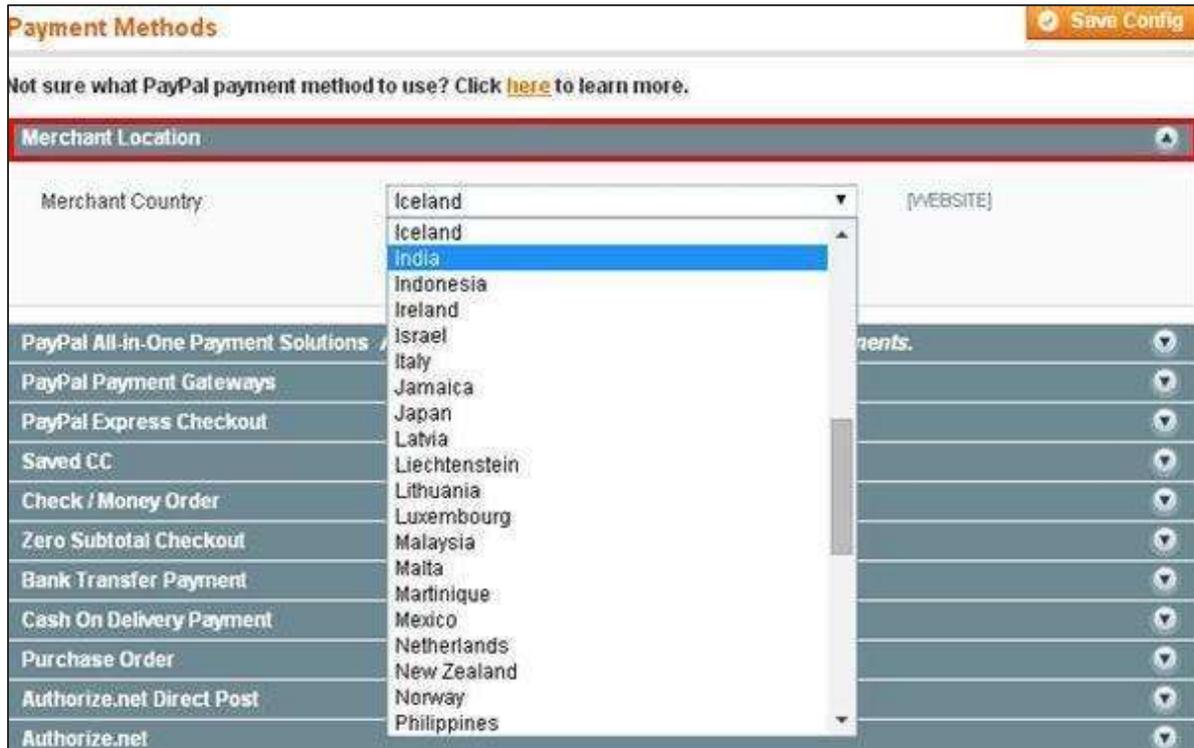
Step (2): Go to **System** menu and click on the **Configuration** option.



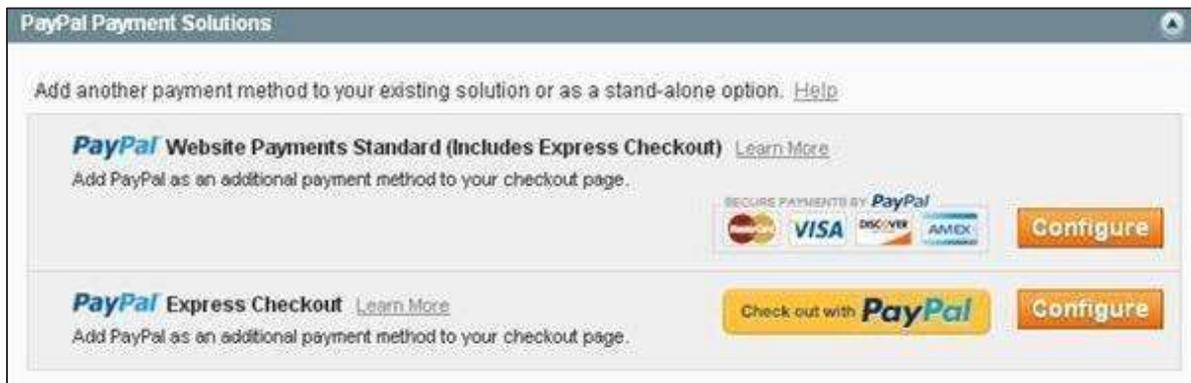
Step (3): Next, you will see some list of options on the left side of the page. Scroll down and go to the **Sales** section and click on the **Payment Methods** option.



Step (4): Next, under Merchant Location panel, set the merchant country from the dropdown menu.



Step (5): It provides following types of payment methods which adds PayPal as additional payment method to your checkout page.



Step (6): You can click on the **Configure** button to make PayPal settings. Fill the e-mail field with e-mail address which is associated with **PayPal Merchant Account** for accepting the payments. Similarly, fill other required fields.

Required PayPal Settings

PayPal Website Payments Standard

Email Associated with PayPal Merchant Account	<input type="text"/>	?	[WEBSITE]
	Start accepting payments via PayPal!		
API Authentication Methods	<input type="text" value="API Signature"/>		[WEBSITE]
API Username	<input type="text"/>		[WEBSITE]
API Password	<input type="text"/>		[WEBSITE]
API Signature	<input type="text"/>		[WEBSITE]
	<input type="button" value="Get Credentials from PayPal"/> <input type="button" value="Sandbox Credentials"/>		
Sandbox Mode	<input type="text" value="No"/>		[WEBSITE]
API Uses Proxy	<input type="text" value="No"/>		[WEBSITE]
Enable this Solution	<input type="text" value="No"/>		[WEBSITE]

Step (7): The following screen shows the Basic and Advanced settings of PayPal payments.

Basic Settings - PayPal Payments Standard

Title	<input type="text" value="PayPal Express Checkout"/>	?	[STORE VIEW]
	<small>It is recommended to set this value to "PayPal" per store views.</small>		
Sort Order	<input type="text"/>		[STORE VIEW]
Payment Action	<input type="text" value="Authorization"/>		[WEBSITE]
Display on Product Details Page	<input type="text" value="Yes"/>		[STORE VIEW]
Advanced Settings			
Display on Shopping Cart	<input type="text" value="Yes (PayPal recommends this option)"/>		[STORE VIEW]
	<small>Also affects mini-shopping cart.</small>		
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="Yes"/>		[WEBSITE]

Step (8): Under **Basic Settings**, enter *Title* for the payment method. *Sort Order* option is used to sort payment methods in the checkout page. *Payment Action* section offers to select either Sale or Authorization or Order, which defines how the payment will be processed in the PayPal payment system.

Step (9): Under **Advanced Settings**, select the *Payment Applicable From* option as All Allowed Countries, *Debug Mode* option as No, *Enable SSL verification* as Yes and *Transfer Cart Line Items* as Yes.

Step (10): After you are done with the settings, click on the **Save Config** button on the top right corner to save your payment methods. Now you are ready to accept payments through your shopping cart.



Payment Methods Save Config

Not sure what PayPal payment method to use? Click [here](#) to learn more.

Merchant Location

Merchant Country: [WEBSITE]

▲ If not specified, Default Country from General Config will be used

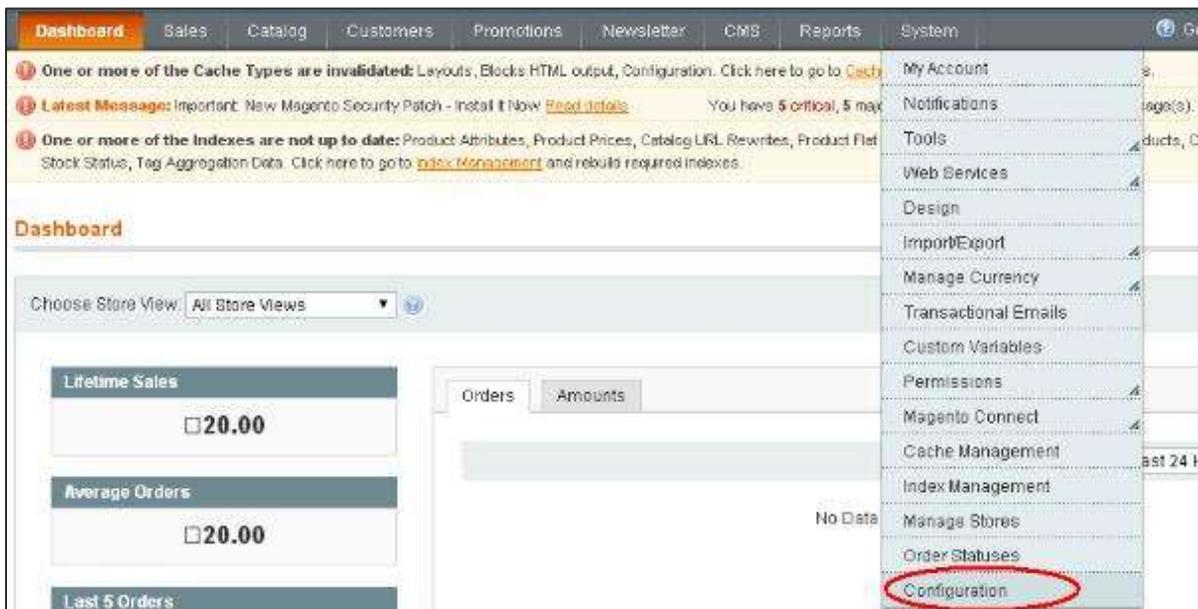
15. Magento – Set Up Currencies

Magento has built-in functionality for currencies. After installing Magento, by default there will be one currency used for pricing and payment.

The following steps illustrate how to set up currencies in Magento store:

Step (1): Login to your Magento Admin Panel

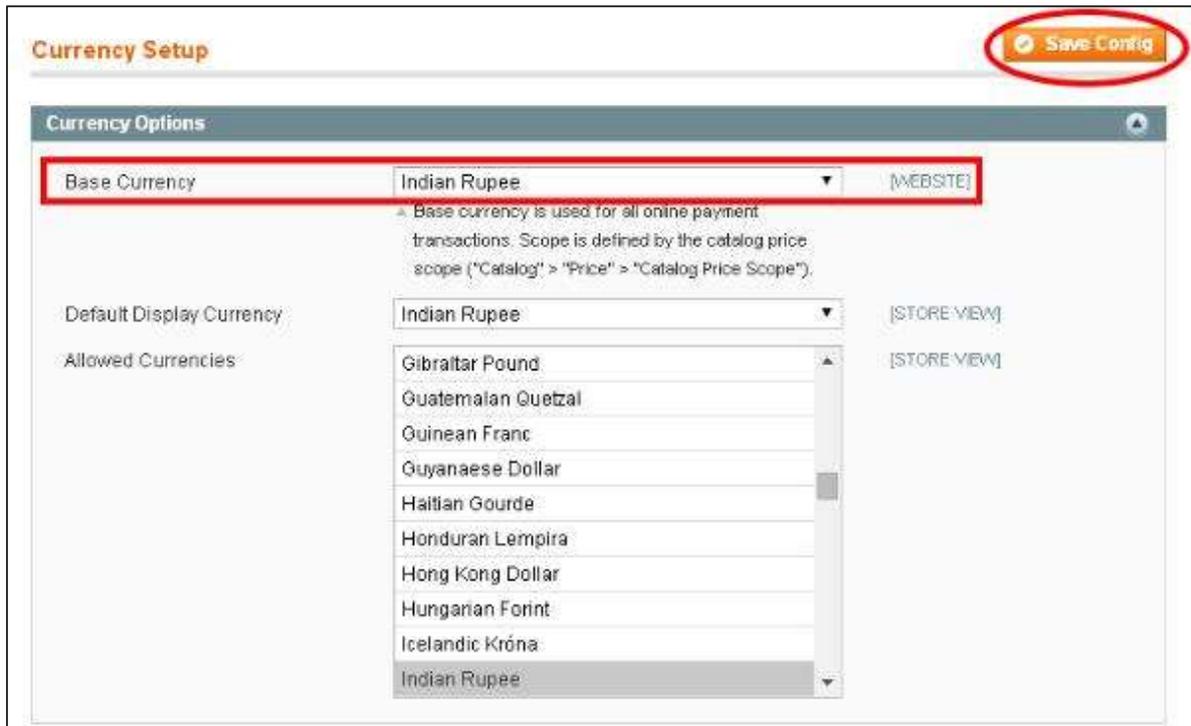
Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): On the left side of the navigation bar, click on the **Currency Setup** option under **General** section.



Step (4): Expand the **Currency Options** panel, and you will get some settings option.



- **Base Currency:** Select the base currency from dropdown menu that you want to set as default. It is directly associated with the price of the products. If you change the base currency, the price will not change and it won't recalculate using new base currency.
- **Default Display Currency:** It displays the default currency that can be used to show the prices of the products. When customer visits your store, it displays the currency set by you.
- **Allowed Currencies:** It provides a long list which allows you to select more than one currency. If there is more than one currency, then customers can select one of the allowed currencies from the dropdown menu on the frontend.

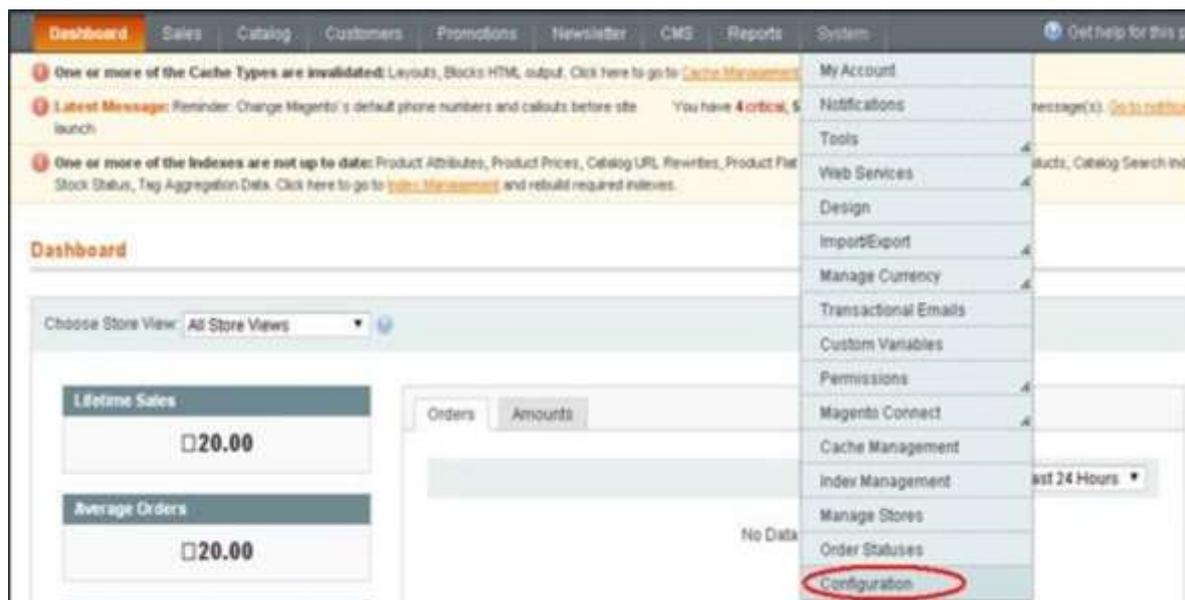
After selecting your currencies option, click on **Save Config** button on the top right corner to save your settings.

16. Magento – Set Up Checkout Options

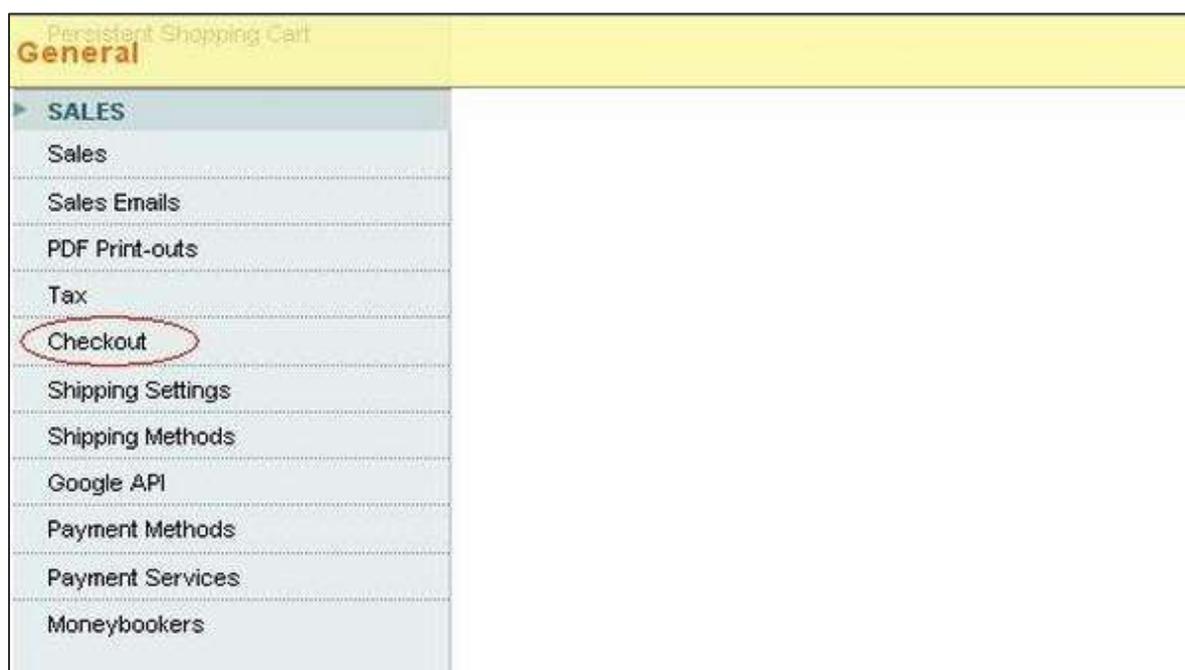
Checkout options are used for enabling and disabling the one-page checkout. This chapter guides you how to configure checkout options from the admin panel of Magento.

Step (1): Login to your Magento Admin Panel.

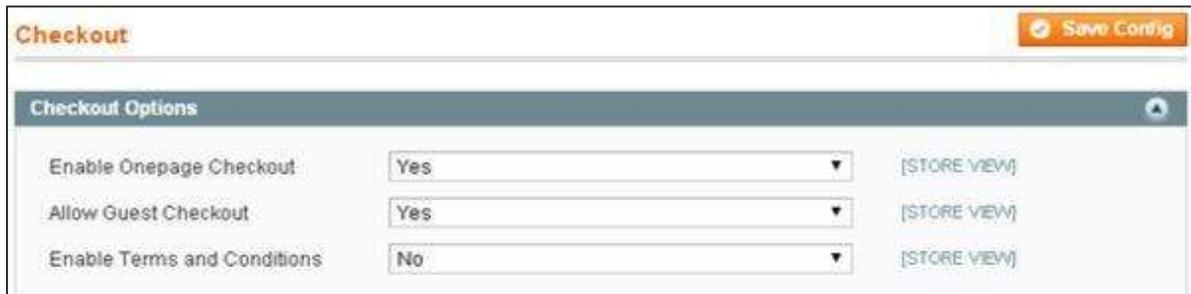
Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): Under **Sales** section on the left side of the navigation bar, click on the **Checkout** option.



Step (4): Expand the **Checkout Options** panel which includes setting for one-page checkout with enable/disable option, you can also enable/disable guest checkout and last option from which you can enable or disable terms and conditions.

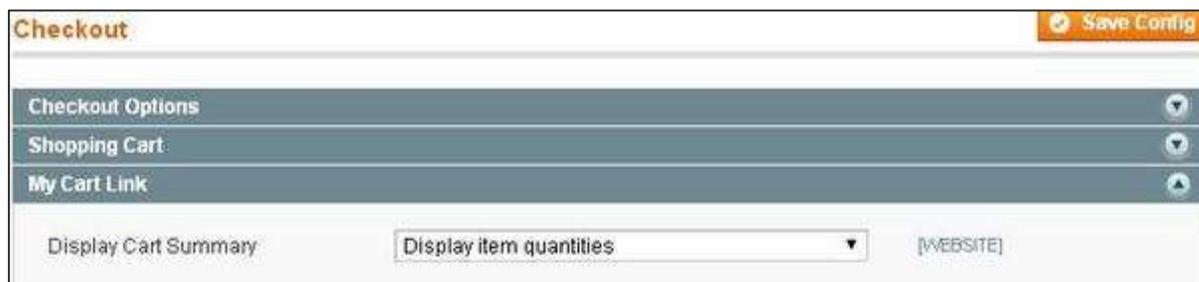


Step (5): The **Shopping Cart** panel has options such as:

- **Quote Lifetime (days)** which determines lifetime of products in cart, after a customer puts items in the cart.
- **After Adding a Product Redirect to Shopping Cart** determines whether customers should be redirected to the shopping cart page after the product is placed in the cart.
- **Grouped Product Image and Configurable Product Image** options determine whether the parent image of product should be displayed on the cart and whether configurable product added to the cart should be displayed on the shopping cart or not.

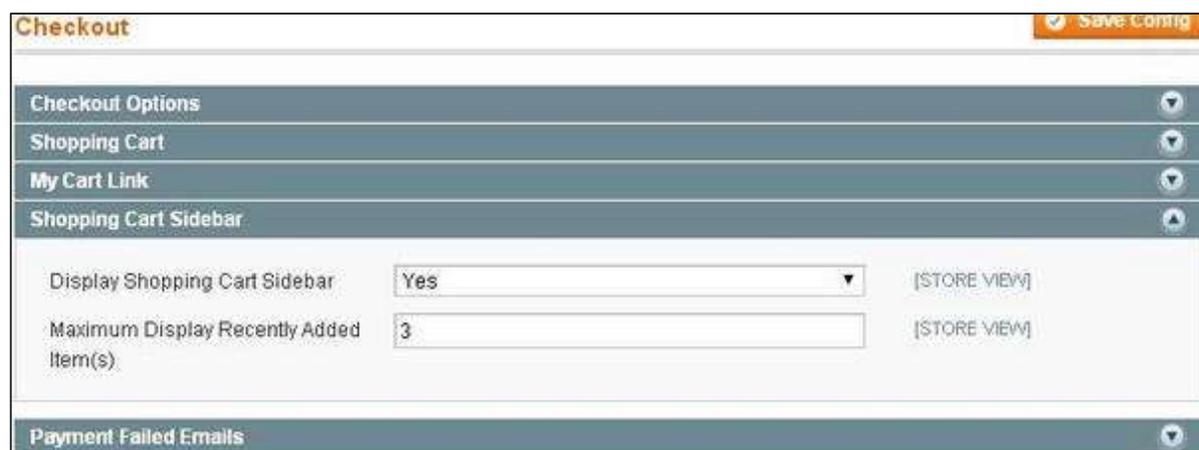


Step (6): The **My Cart Link** panel specifies whether the number of quantities in the cart should be shown or whether the number of different products should be shown using the *Display Cart Summary* field.



Step (7): The **Shopping Cart Sidebar** panel contains two options:

- The **Display Shopping Cart Sidebar** option can hide or show the cart sidebar on the frontend.
- **Maximum Display Recently Added Item(s)** option specifies recently added items to be listed in the cart.



Step (8): The **Payment Failed Emails** panel has some settings such as:

- **Payment Failed Email Receiver** option stores e-mail address to which payment failed e-mail should be sent.
- **Payment Failed Email Sender** option specify from which e-mail address payment failed e-mail should be sent.
- **Payment Failed Template** option specifies which template should be used to display message.
- **Send Payment Failed Email Copy To** option allows to send copies of e-mails to additional e-mail addresses and last option.
- **Send Payment Failed Email Copy Method** selects either separate e-mails or blind carbon copies methods to send payment failed e-mails.

Checkout
Save Config

Checkout Options ▼

Shopping Cart ▼

My Cart Link ▼

Shopping Cart Sidebar ▼

Payment Failed Emails ▲

Payment Failed Email Reciever	<input type="text" value="General Contact"/>	[STORE VIEW]
Payment Failed Email Sender	<input type="text" value="General Contact"/>	[STORE VIEW]
Payment Failed Template	<input type="text" value="Payment Failed (Default Template from Locale)"/>	[STORE VIEW]
Send Payment Failed Email Copy To	<input type="text"/>	[STORE VIEW]
	<small>▲ Separate by " , "</small>	
Send Payment Failed Email Copy Method	<input type="text" value="Bcc"/>	[STORE VIEW]

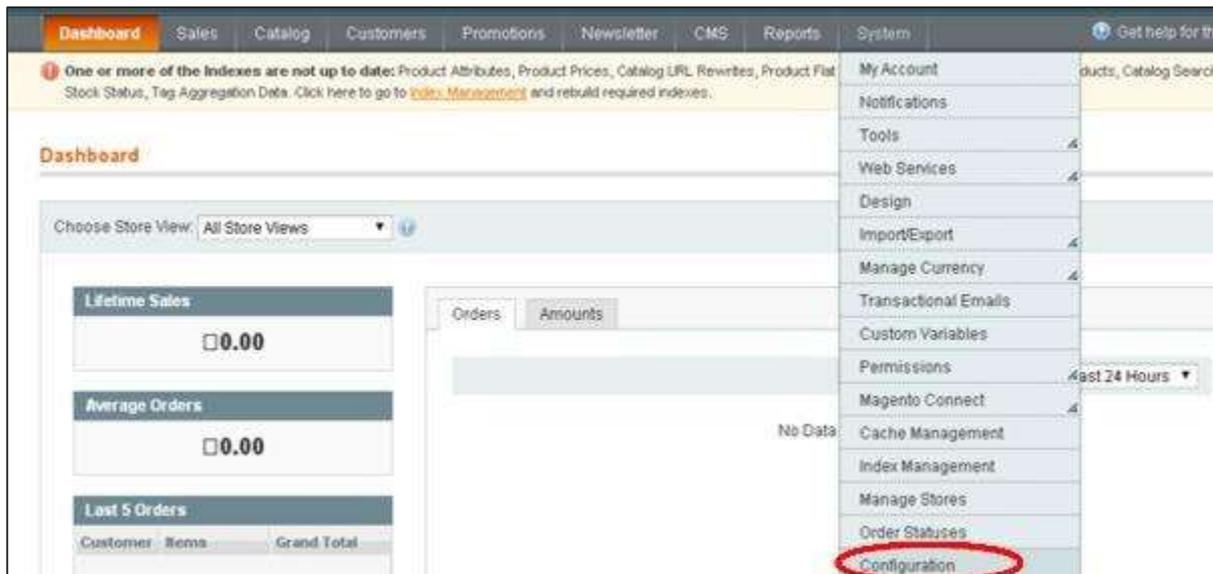
Step (9): After done with all settings, click on the **Save Config** button to save your settings.

17. Magento – Set Up Paypal Payment

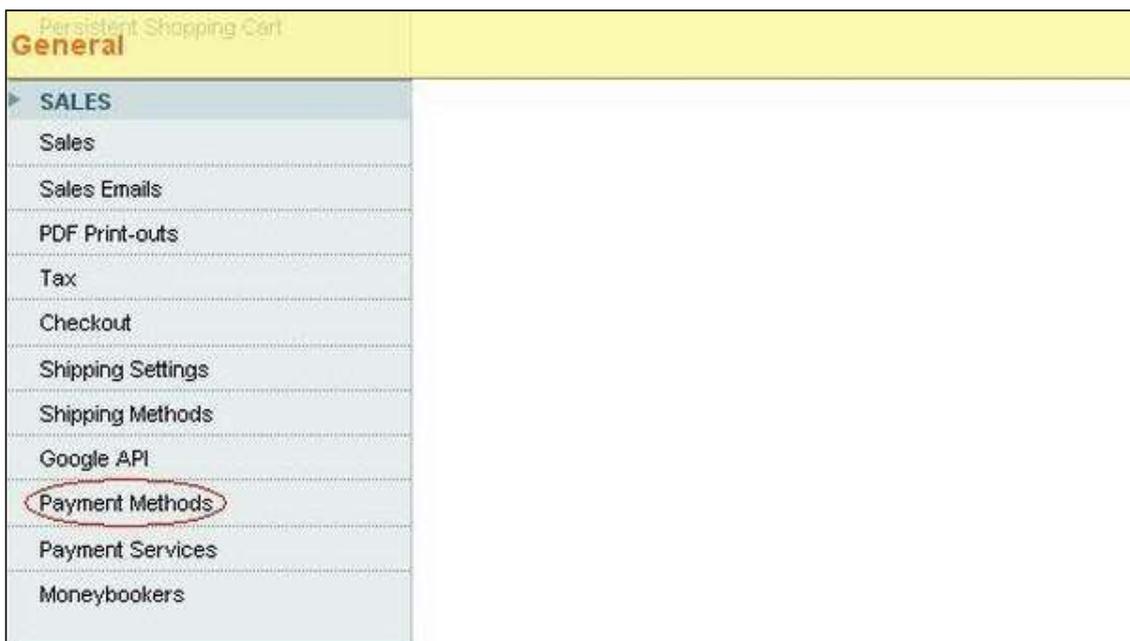
In this chapter, we will study how to set up PayPal payment. Following are the steps to set up PayPal payment in Magento.

Step (1): Login to your Magento Admin Panel.

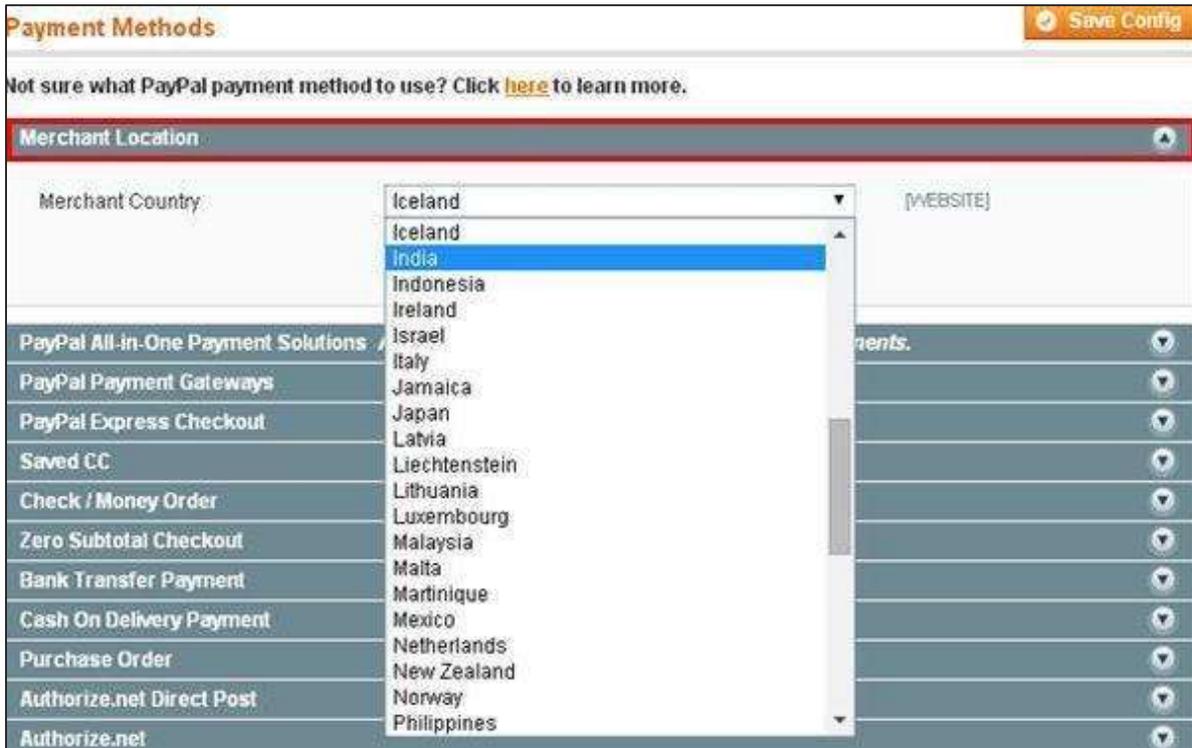
Step (2): Go to **System** menu and click on the **Configuration** option.



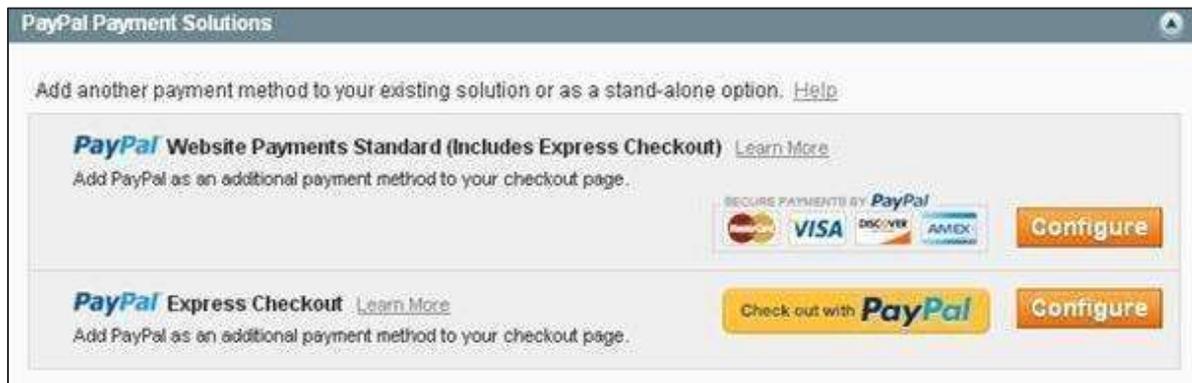
Step (3): On the left side of the navigation bar, click on the **Payment Methods** under **Sales** section.



Step (4): Next, under **Merchant Location** panel, set the merchant country from the dropdown menu.



Step (5): It provides the following types of payment methods which adds PayPal as an additional payment method.



Step (6): You can click on the **Configure** button to make PayPal settings. Fill the e-mail field with an e-mail address which is associated with PayPal merchant account for accepting the payments, along with all other required fields.

Required PayPal Settings

PayPal Website Payments Standard

Email Associated with PayPal Merchant Account [?] [WEBSITE]
Start accepting payments via PayPal!

API Authentication Methods [WEBSITE]

API Username [WEBSITE]

API Password [WEBSITE]

API Signature [WEBSITE]

Sandbox Mode [WEBSITE]

API Uses Proxy [WEBSITE]

Enable this Solution [WEBSITE]

Step (7): The following screen shows you the Basic and Advanced settings of PayPal payments.

Basic Settings - PayPal Payments Standard

Title [STORE VIEW]
It is recommended to set this value to "PayPal" per store views.

Sort Order [STORE VIEW]

Payment Action [WEBSITE]

Display on Product Details Page [STORE VIEW]

Advanced Settings

Display on Shopping Cart [STORE VIEW]
Also affects mini-shopping cart.

Payment Applicable From [WEBSITE]

Debug Mode [WEBSITE]

Enable SSL verification [WEBSITE]

Transfer Cart Line Items [WEBSITE]

Step (8): Under Basic Settings

- Enter *Title* for the payment method.
- *Sort Order* option used to sort payment methods in the checkout page
- *Payment Action* section offers to select either Sale or Authorization or Order, which defines how the payment will be processed in the PayPal payment system.

Step (9): Under Advanced Settings

- Select the *Payment Applicable From* option as All Allowed Countries.
- *Debug Mode* option as No.
- *Enable SSL verification* as Yes.
- *Transfer Cart Line Items* as Yes.

Step (10): After done with the settings, click on the **Save Config** button on the top right corner to save your payment methods. Now you are ready to accept payments through your shopping cart.



Payment Methods Save Config

Not sure what PayPal payment method to use? Click [here](#) to learn more.

Merchant Location

Merchant Country: [WEBSITE]

▲ If not specified, Default Country from General Config will be used

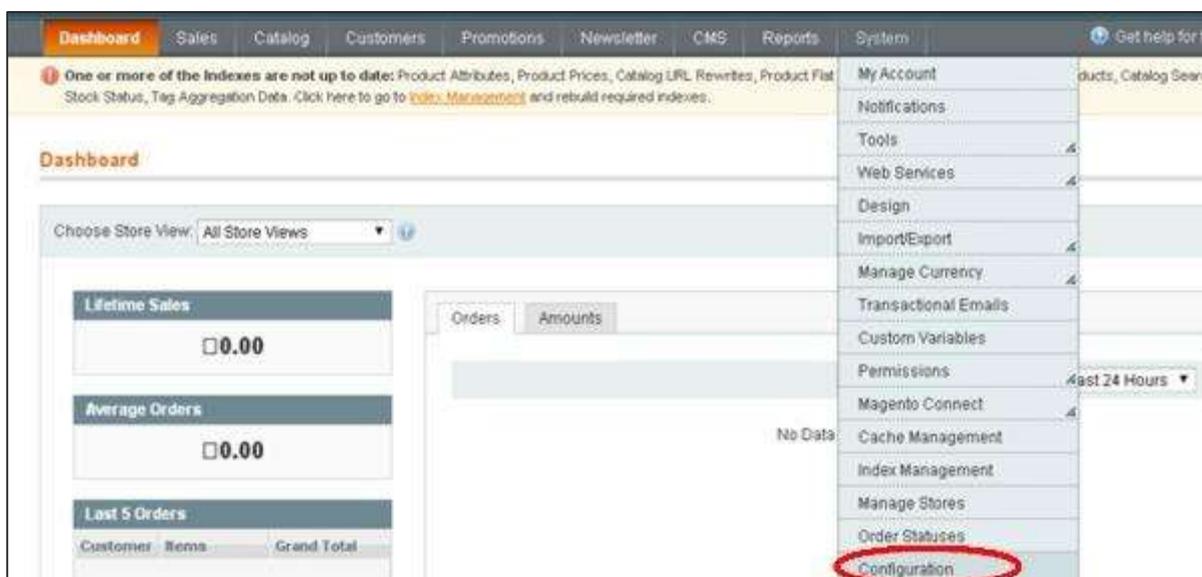
18. Magento – Set Up Google Checkout

Google Checkout is online payment processing service provided by Google. Magento allows integration of online stores with Google checkout. It is like PayPal that simplifies the process of paying for online purchases. To use Google Checkout, customers need to have Google Checkout merchant account.

The following steps help to set up Magento store with Google Checkout.

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **System** menu and click on the **Configuration** option.

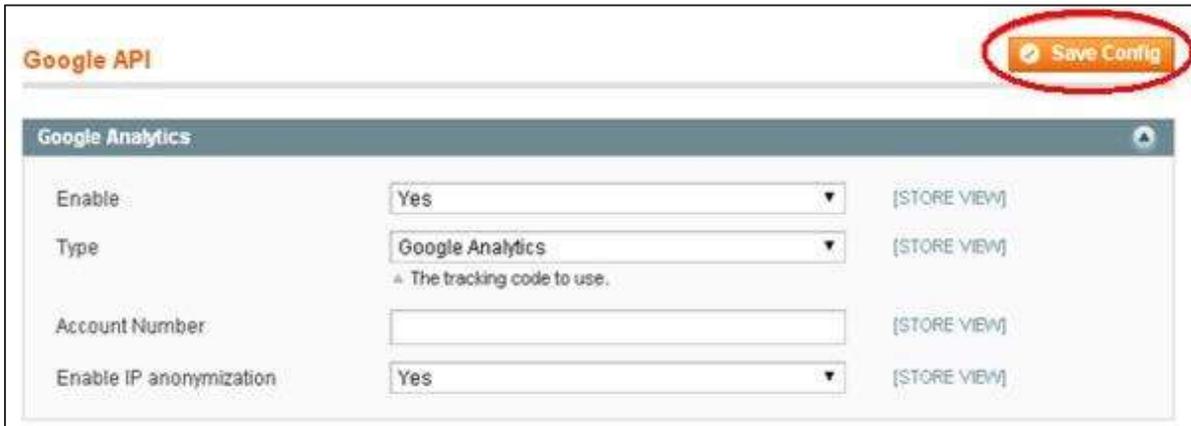


Step (3): On the left side of the navigation bar, click on the **Google API** under **Sales** section.



Step (4): Expand the **Google Analytics** panel which shows some settings such as:

- **Enable** option should be set to Yes to activate payment method.,
- **Type** option provides two types: Google Analytics and Universal Analytics.
- **Account Number** accepts your account number.
- **Enable IP anonymization** option should be set to Yes.



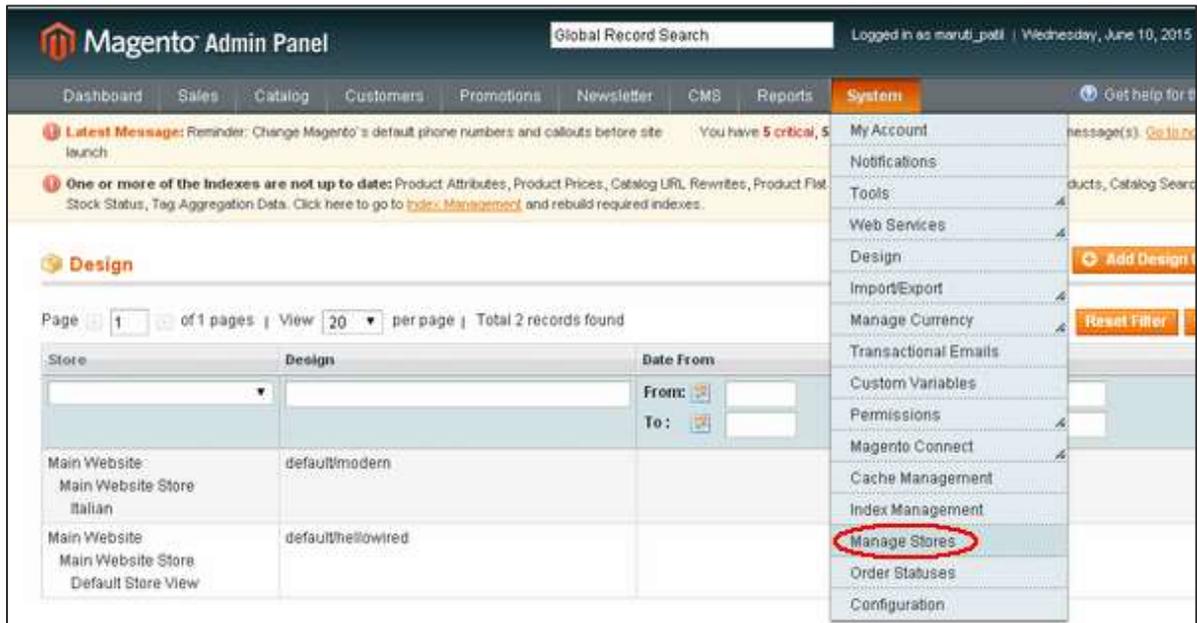
After done with the settings, click on the **Save Config** button on the top right corner of the page to save the changes that you have made.

19. Magento – Set Up Store Live

This chapter shows how to setup the live store on your Magento website.

Step (1): Login to your Magento Admin Panel.

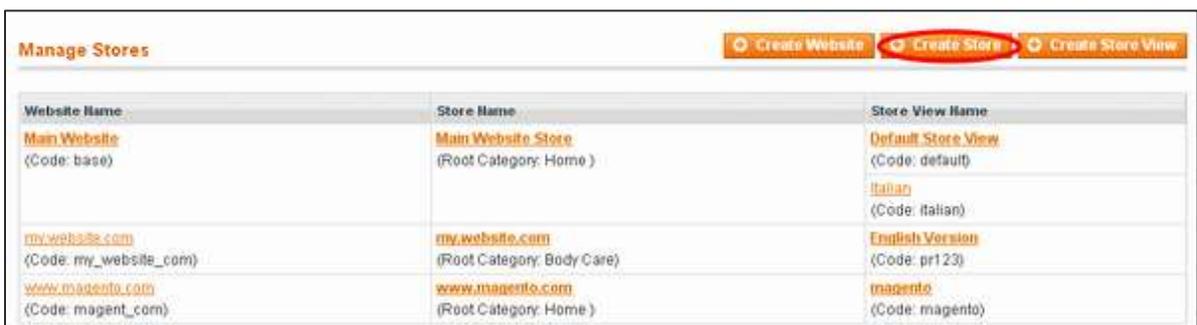
Step (2): Go to **System** menu and click on the **Manage Stores** option.



The screenshot shows the Magento Admin Panel interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The 'System' menu is open, showing options like 'My Account', 'Notifications', 'Tools', 'Web Services', 'Design', 'Import/Export', 'Manage Currency', 'Transactional Emails', 'Custom Variables', 'Permissions', 'Magento Connect', 'Cache Management', 'Index Management', 'Manage Stores', 'Order Statuses', and 'Configuration'. The 'Manage Stores' option is circled in red. Below the menu, a table displays store configurations with columns for 'Store', 'Design', and 'Date From'.

Store	Design	Date From
Main Website Main Website Store Italian	default/modern	
Main Website Main Website Store Default Store View	default/hellowired	

Step (3): Under **Manage Stores** section, you will get website names, store names and Store View Name columns. Click on the **Create Store** button to begin with setting up the Magento live store.



The screenshot shows the 'Manage Stores' section in the Magento Admin Panel. At the top, there are three buttons: 'Create Website', 'Create Store', and 'Create Store View'. Below the buttons is a table with three columns: 'Website Name', 'Store Name', and 'Store View Name'.

Website Name	Store Name	Store View Name
Main Website (Code: base)	Main Website Store (Root Category: Home)	Default Store View (Code: default) Italian (Code: Italian)
my.website.com (Code: my_website_com)	my.website.com (Root Category: Body Care)	English Version (Code: pr123)
www.magento.com (Code: magent_com)	www.magento.com (Root Category: Home)	magento (Code: magento)

Step (4): The store information includes some options such as:

- **Website** which allows selecting the website name which you created before.
- **Name** option specifies name of your second website name.
- **Root Category** option specifies the root category that will be used for store.



The screenshot shows the 'New Store' configuration page in Magento. At the top right, there are three buttons: 'Back', 'Reset', and 'Save Store'. Below the header is a section titled 'Store Information'. This section contains three form fields: 'Website' with a dropdown menu currently set to 'Main Website', 'Name' with an empty text input field, and 'Root Category' with a dropdown menu showing '-- Please Select a Category --'.

After done with the settings, click on the **Save Store** button.

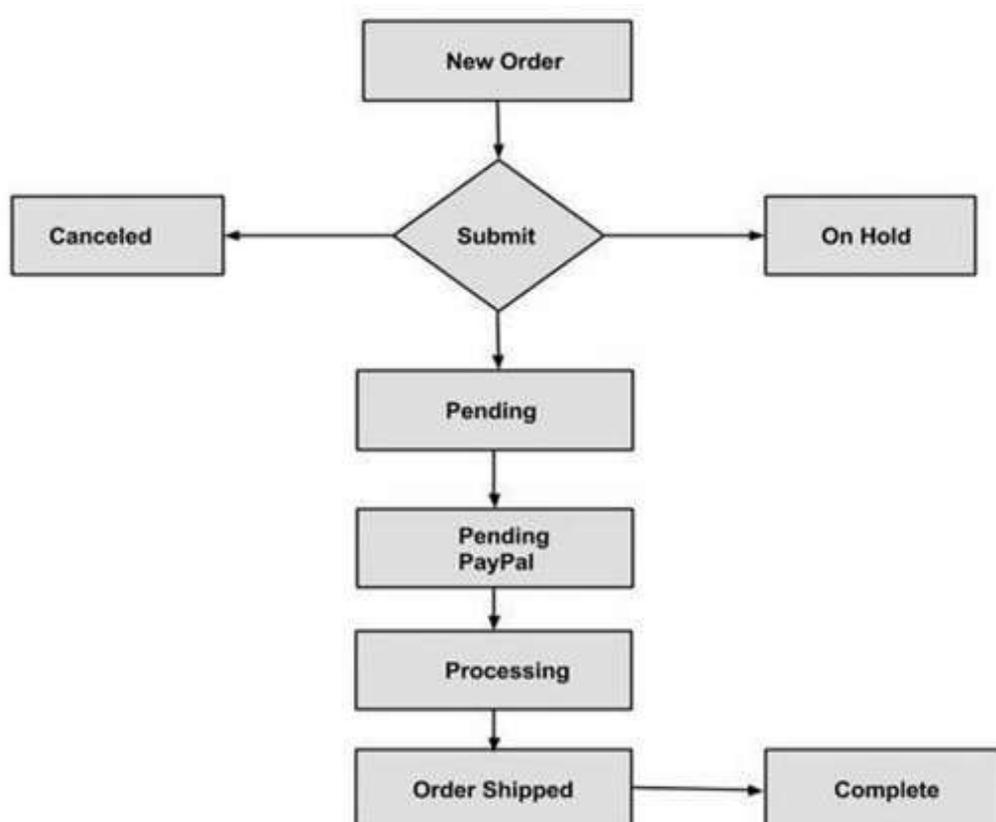
Part 3: Order Processing

20. Magento – Orders Life Cycle

Orders follow a standard life cycle process. When the customer places product orders, it arrives in the administration interface with a pending status. When the order is processed, the status of order changes according to the current state in the processing workflow. Once the invoice is created for the order, the status changes from pending to processing status. Next, it creates shipment for an order which changes the status from pending to complete status.

Order Status in Magento

The following screen shows the order process in Magento:



New Order: Customer places an order into the Magento store.

Pending: Pending orders are brand new orders that have not been processed. These orders need to be invoiced and shipped.

Pending PayPal: These are the brand new orders that have been not cleared by PayPal.

Processing: When you invoice the order, Magento will change the state to 'processing'.

Cancelled: This status is called when the customer visits the store and cancels an order or else if the order has been not paid for.

Order Shipped: Order shipment is generated when an order status changes from pending to complete.

On Hold: Order is put on hold when more information from the user is required before the purchase is processed.

Complete: When order is marked as complete, it has been both invoiced and shipped.

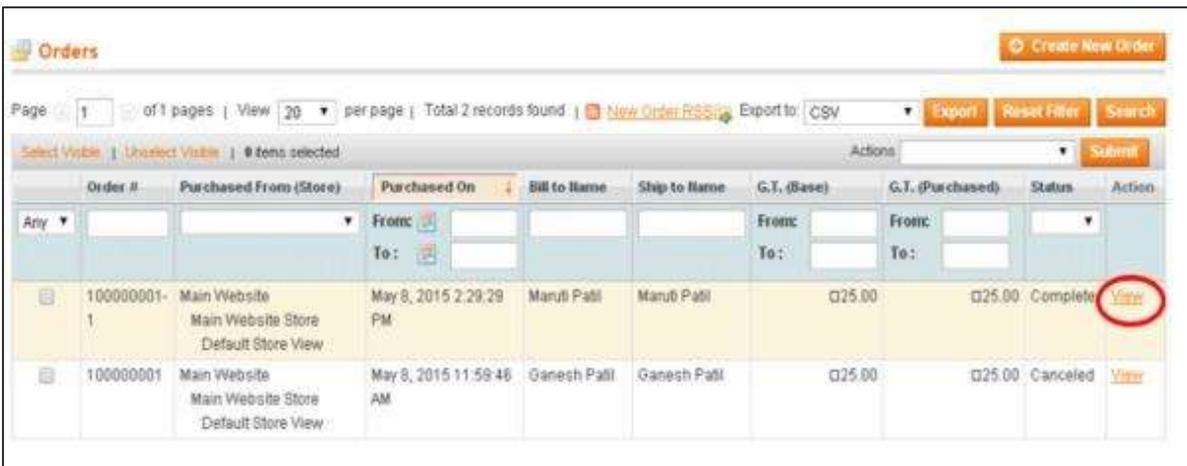
The following steps describe how Magento order life cycle works:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Sales** menu and click on the **Orders** option.



Step (3): Next, you can see some orders list. Click on the **View** link to see the order's information.



Step (4): You will see the customer's account information and billing address. When you scroll down, you will see the history status under the **Comments History** section.

Order # 100000001-1 (the order confirmation email was sent)

Order Date: **May 8, 2015 2:29:29 PM**

Order Status: **Complete**

Purchased From: **Main Website
Main Website
Store
Default Store
View**

Link to the Previous Order: [100000001](#)

Account Information

Customer Name: **Maruti Patil**

Email: **maruti061@gmail**

Customer Group: **General**

Billing Address Edit

Maruti Patil
Techbuds
301 Arjun Empire
Congress road
Belgaum, Karanataka, 591002
India
T: 07022077221

Shipping Address Edit

Maruti Patil
Techbuds
301 Arjun Empire
Congress road
Belgaum, Karanataka, 591002
India
T: 07022077221

Payment Information

Check / Money order
Order was placed using INR

Shipping & Handling Information

[Track Order](#)
Flat Rate - Fixed ₹5.00

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
nabil SKU: 8888	Shipped	₹20.00	₹20.00	Ordered 1 Invoiced 1 Shipped 1	₹20.00	₹0.00	0%	₹0.00	₹20.00

Comments History

Add Order Comments

Status: **Complete**

Comment:

Notify Customer by Email Visible on Frontend

Order Totals

Subtotal	₹20.00
Shipping & Handling	₹5.00
Grand Total	₹25.00
Total Paid	₹25.00
Total Refunded	₹0.00
Total Due	₹0.00

Step (5): Click on **Track** and scroll down to the lower portion of the page. Under the **Items** table, go to **Track** column which provides tracking options like Backordered, Received or Returned when you click on the dropdown menu. Select your option and click on the **Submit Changes** button to save your settings.

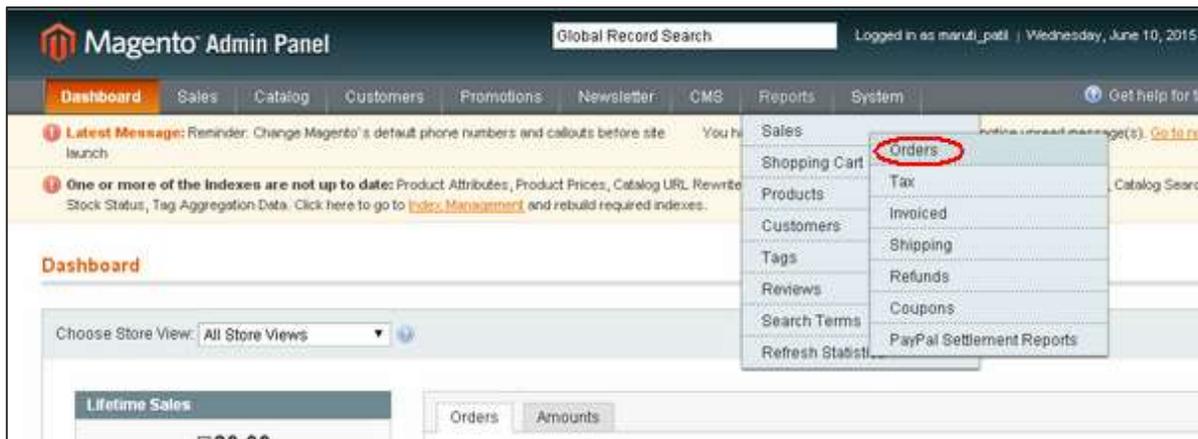
The screenshot displays the Magento Admin interface for tracking an order item. At the top, it shows 'United States' and 'T: 801-472-0428'. Below this is a table with columns: 'Item', 'Status', 'Original Price', 'Price', 'Qty', 'Subtotal', 'Tax Amount', 'Tax Percent', 'Discount Amount', and 'Row Total'. Two rows are visible, both with a status of 'Ordered' and a price of '\$ 6.72'. The 'Track' column for the first row is open, showing a dropdown menu with options: 'Received', 'Backordered', 'Received', and 'Returned'. The 'Returned' option is highlighted. Below the table is a 'Track Comments' section with a text input field. To the right of the comments is a yellow box containing four checkboxes: 'Email Copy to Customer' (checked), 'Email Copy to FHC' (checked), 'Email Copy to MQC' (checked), and 'Append Comments' (unchecked). At the bottom right of this box is a red 'Submit Changes' button.

21. Magento – Set Up Order Options

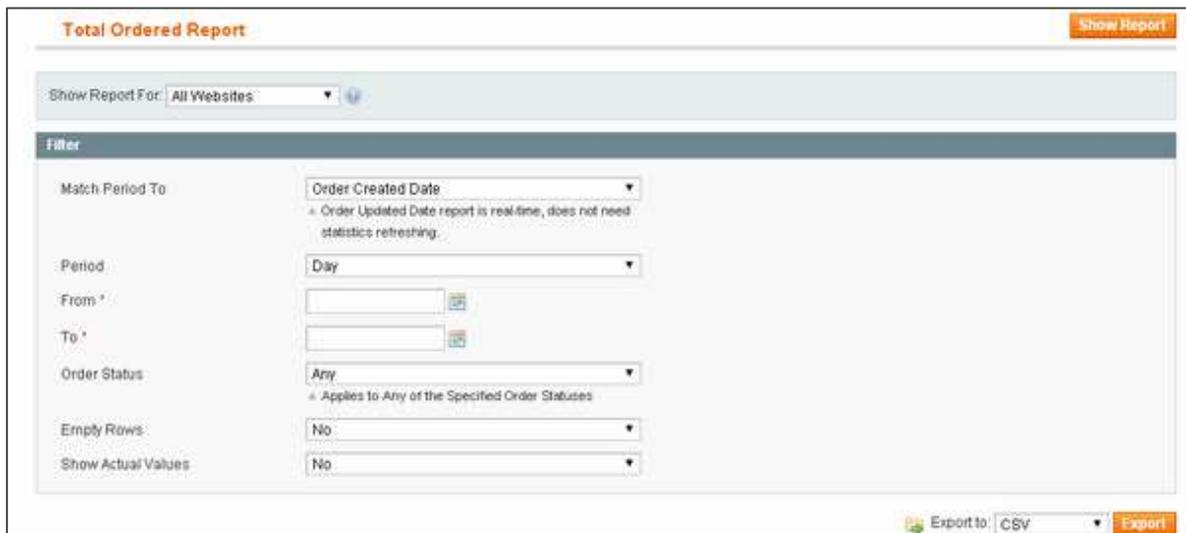
Magento provides various options for product orders and also reports of the ordered products.

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Report** menu and click on **Orders** under **Sales** option.



Step (3): The **Total Ordered Report** has some settings as shown in the following screen.



- **Match Period To:** It matches the product ordered date with order created data and updated date.
- **Period:** It specifies the period such as day, year and month.

- **From and To:** These options display the date of order, i.e. they specify the date on which the order was created date and the date up to which it is valid.
- **Order Status:** It specifies the status of the order.
- **Empty Rows:** If you don't want to specify empty rows, then set Empty Rows field to No.
- **Show Actual Values:** If you don't want to display actual values of product, then set the field to No.

Step (4): You can get a report of the order by clicking on the **Show Report** button and you can also save your ordered details in the **CSV** file format by clicking on the **Export** button.

The screenshot shows the 'Total Ordered Report' interface. At the top right, there is a 'Show Report' button. Below it, a dropdown menu is set to 'All Websites'. A 'Filter' section contains the following options:

- Match Period To:** Order Created Date (with a note: Order Updated Date report is real-time, does not need statistics refreshing.)
- Period:** Day
- From *:** [Date input field]
- To *:** [Date input field]
- Order Status:** Any (with a note: Applies to Any of the Specified Order Statuses)
- Empty Rows:** No
- Show Actual Values:** No

At the bottom right, there is an 'Export to CSV' button and a red 'Export' button.

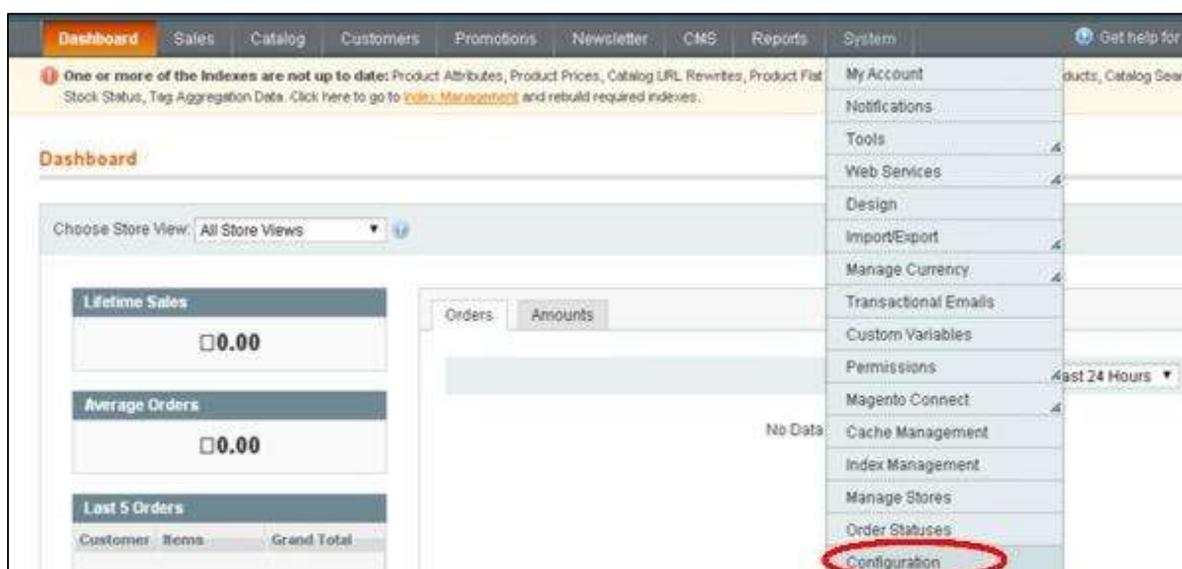
22. Magento – Set Up Order E-Mails

This chapter describes how Magento manages e-mails, how you can edit e-mail content, set e-mails from and to parameters, etc. Magento has built-in functionality called **Sales Emails** which manages the e-mails sent to customers when the order is processed.

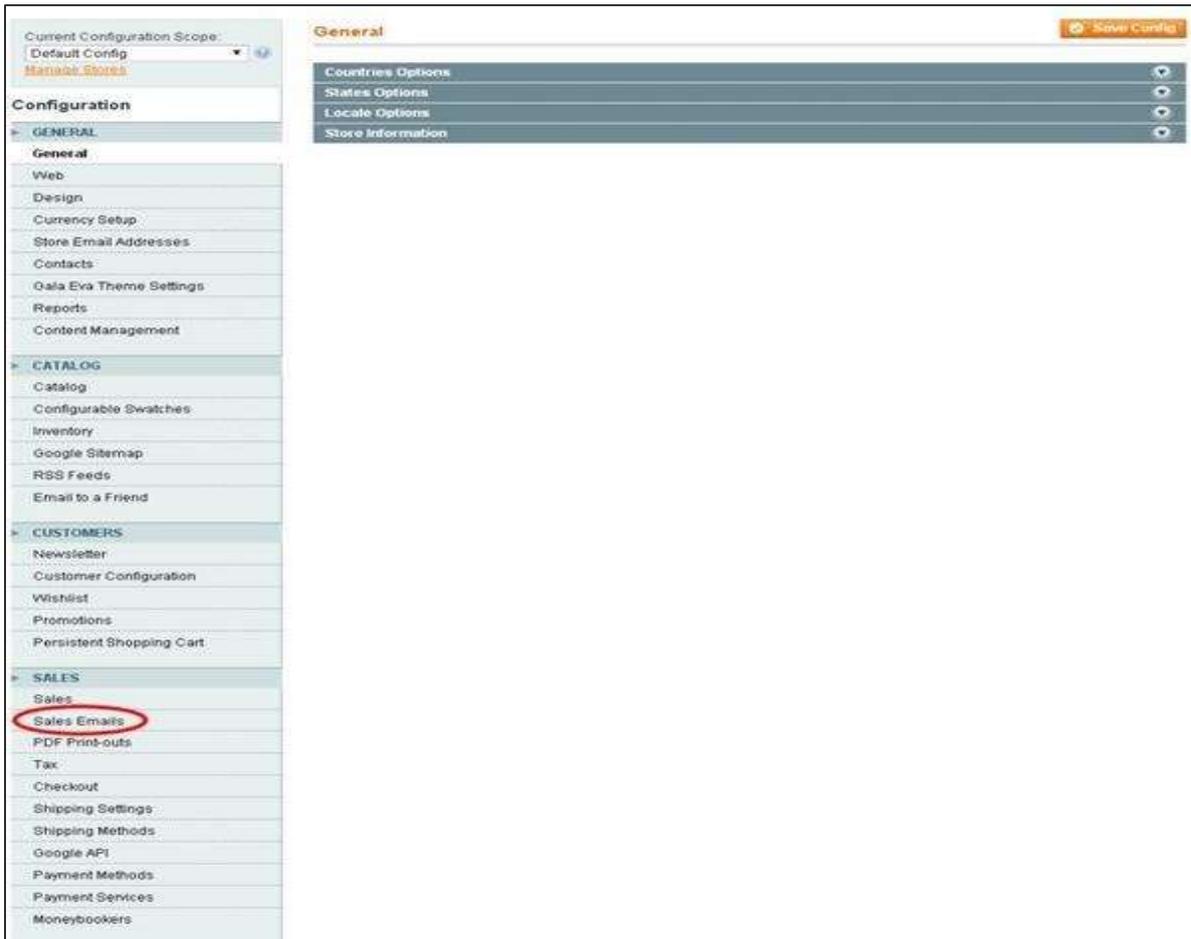
The following steps describe how to set up order e-mails in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to the **System** menu and click on **Configuration** option.



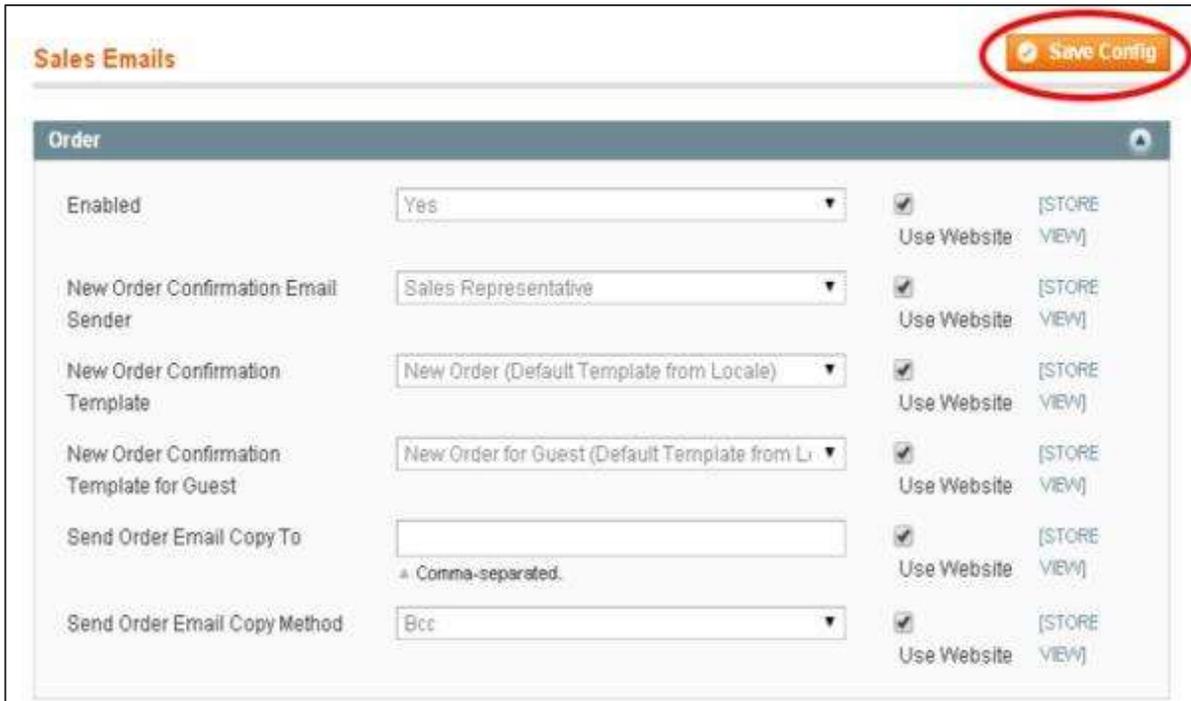
Step (3): On the left side of the navigation bar, go to **Sales** section and click on the **Sales Emails** option.



Step (4): Select the scope under **Current Configuration Scope** for which you want this configuration to apply.



Step (5): Under Sales Emails page, expand the **Order** panel which contains the following settings.



- **Enabled:** Set this option to Yes to enable new order confirmation e-mails to be sent.
- **New Order Confirmation Email Sender:** Using this field, select the e-mail address which is to be used for sending new order confirmation.
- **New Order Confirmation Template:** It selects the template which is to be used for the order confirmation e-mails, sent to the registered customers.
- **New Order Confirmation Template for Guest:** It selects the template which is to be used for the order confirmation e-mails, sent to the guest customers.
- **Send Order Email Copy To:** It specifies the e-mail address to which copy of the new order confirmation e-mail is sent.
- **Send Order Email Copy Method:** You can send copy of the new order confirmation e-mail to the additional e-mail address using BCC or separate e-mail.

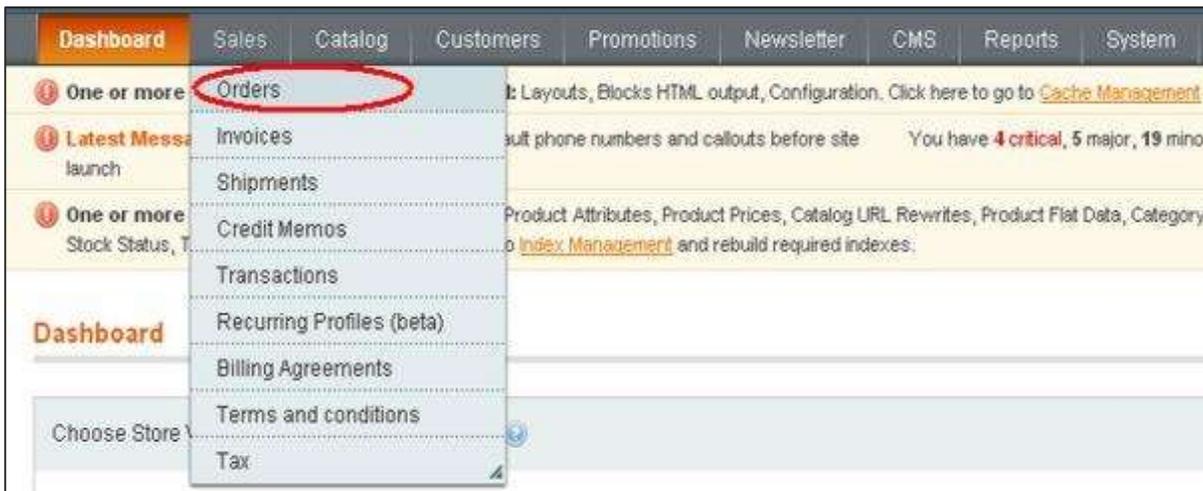
Step (6): After done with the settings, click on the **Save Config** button to save your changes.

23. Magento – Create Orders

Magento allows to create an order from a shopping cart. You can create an order in Magento store as described in the following steps.

Step (1): Login to your Magento Admin Panel

Step (2): Go to **Sales** menu and click on the **Orders** option.



Step (3): Click on the **Create New Order** button to create new order in the Magento store.



Step (4): It will display the list of customers under New Order section. If there are no records, then click on **Create New Customer** button.



Step (5): Moving forward, you need to select your desired store to proceed to the next step.



Step (6): Under **Items Ordered** section, it will display the ordered products information. If there are no ordered items, then click on the **Add Products** button to select the product which you want to order.



Step (7): Select the product from the list which you want to order and click on the **Add Selected Product(s) to Order** button.



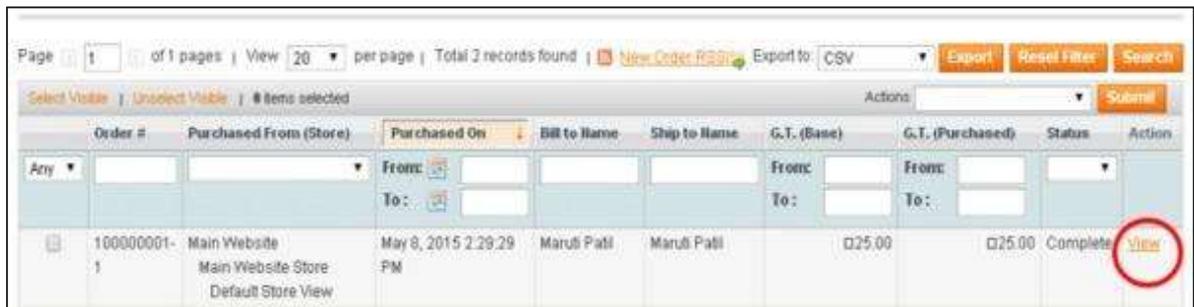
Step (8): Scroll down and select the **Payment Method** and **Shipping Method** for your order.



Step (9): After selecting your payment method and shipping method, click on the **Submit Order** button to save your order.



Step (10): To see the status of the order, go to **Sales** menu and click on the **Orders** option. To see the details of the product, click on the **View** link as shown in the following screen.



Step (11): Now you can see the account information and billing address of the customer. Scroll down, you will see the status of the product and comment area under the **Comments History** column.

Order # 100000001-1 | May 8, 2015 2:29:29 PM [Back](#) [Send Email](#) [Credit Memo](#) [Reorder](#)

Order # 100000001-1 (the order confirmation email was sent)

Order Date: **May 8, 2015 2:29:29 PM**

Order Status: **Complete**

Purchased From: **Main Website Main Website Store Default Store**
[View](#)

Link to the Previous Order: [100000001](#)

Account Information

Customer Name: **Maruti Patil**

Email: **marutip061@gmail**

Customer Group: **General**

Billing Address [Edit](#)

Maruti Patil
Techbuds
301 Arjun Empire
Congress road
Belgaum, Karanataka, 591002
India
T: 07022077221

Shipping Address [Edit](#)

Maruti Patil
Techbuds
301 Arjun Empire
Congress road
Belgaum, Karanataka, 591002
India
T: 07022077221

Payment Information

Check / Money order
Order was placed using INR

Shipping & Handling Information

[Track Order](#)
Flat Rate - Fixed ₹5.00

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
nabil SKU: 88888	Shipped	₹20.00	₹20.00	Ordered 1	₹20.00	₹0.00	0%	₹0.00	₹20.00
				Invoiced 1					
				Shipped 1					

Comments History

Add Order Comments

Status: **Complete** ▼

Comment:

Notify Customer by Email Visible on Frontend [Submit Comment](#)

Order Totals

Subtotal: ₹20.00

Shipping & Handling: ₹5.00

Grand Total: ₹25.00

Total Paid: ₹25.00

Total Refunded: ₹0.00

Total Due: ₹0.00

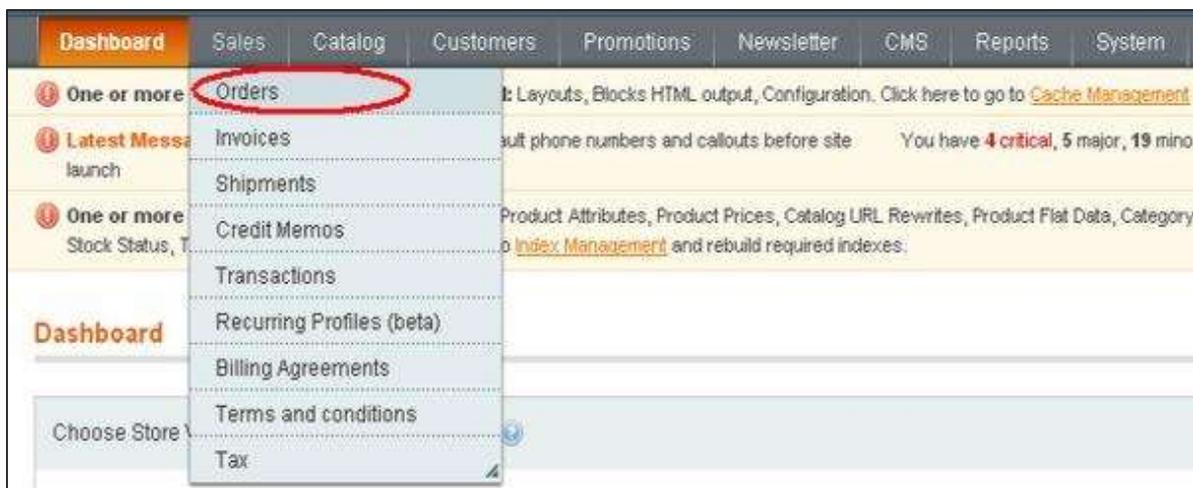
24. Magento – Manage Orders

Order management is an important process which allows businesses to run smoothly and keeps customers happy, making them more likely to visit your site again in the future. When the customer completes the order process, you will receive a new order notification mail.

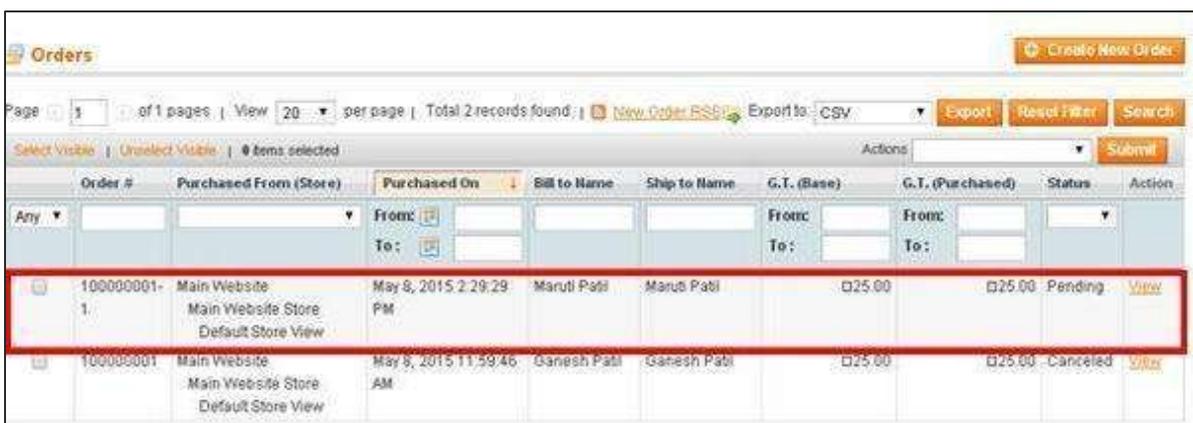
The following steps describe how to manage orders in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Sales** menu and click on the **Orders** option.



Step (3): It will display the list of orders placed in the store. Click on any of the orders.



Step (4): Next, it will show the order form. It includes information regarding the order such as the account information and billing address of the customer, payment information, status of the product and comment area under the Comments History column, etc.

Order # 100000001-1 | May 8, 2015 2:29:29 PM

Back Edit Cancel Send Email Hold Invoice Ship Reorder

Order # 100000001-1 (the order confirmation email was sent)

Order Date: **May 8, 2015 2:29:29 PM**

Order Status: **Pending**

Purchased From: **Main Website
Main Website Store
Default Store View**

Link to the Previous Order: **100000001**

Account Information

Customer Name: **Manu Patil**

Email: **manu@05132@gmail.com**

Customer Group: **General**

Billing Address Edit

Manu Patil
Techbuds
301 Arjun Empire
Congress road
Belgaum, Karnataka, 591002
India
T: 07022077221

Shipping Address Edit

Manu Patil
Techbuds
301 Arjun Empire
Congress road
Belgaum, Karnataka, 591002
India
T: 07022077221

Payment Information

Check / Money order
Order was placed using INR

Shipping & Handling Information

Flat Rate - Fixed 05.00

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
naill SKU: 88888	Ordered	020.00	020.00	Ordered 1	020.00	00.00	0%	00.00	020.00

Comments History

Add Order Comments

Status: **Pending**

Comment:

Notify Customer by Email

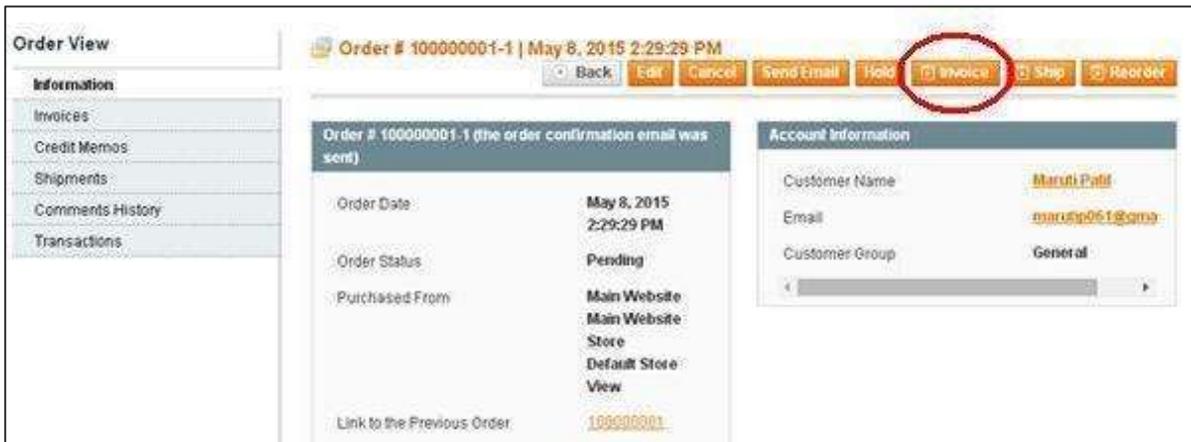
Visible on Frontend

May 8, 2015 2:29:30 PM | Pending
Customer Not Notified

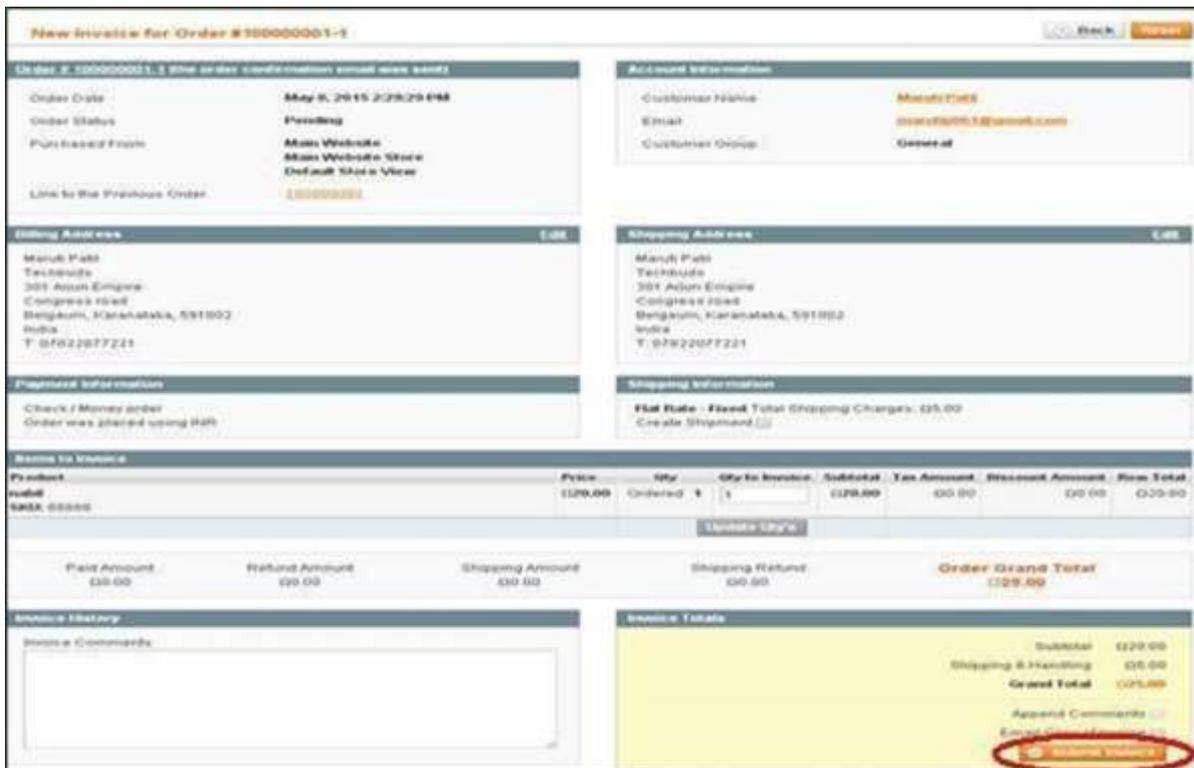
Order Totals

Subtotal	020.00
Shipping & Handling	05.00
Grand Total	025.00
Total Paid	00.00
Total Refunded	00.00
Total Due	025.00

Step (5): You can see the e-mail has been sent to the customer regarding the product order. Create the invoice for the order and alert the customer that the order is accepted by clicking on the **Invoice** button.



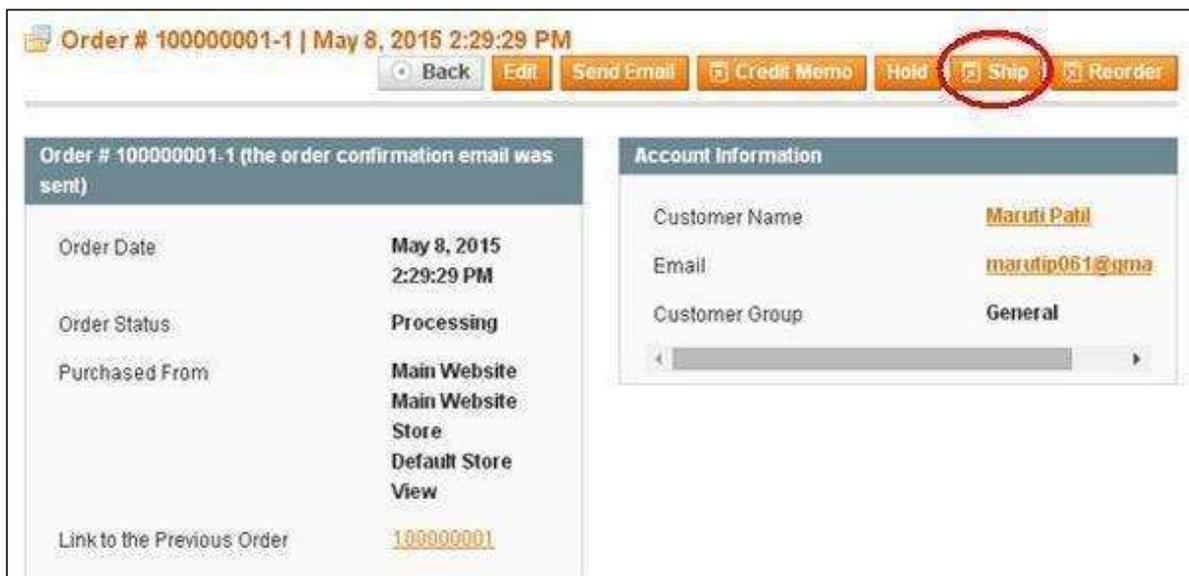
Step (6): Scroll down the invoice page and click on the **Submit Invoice** button.



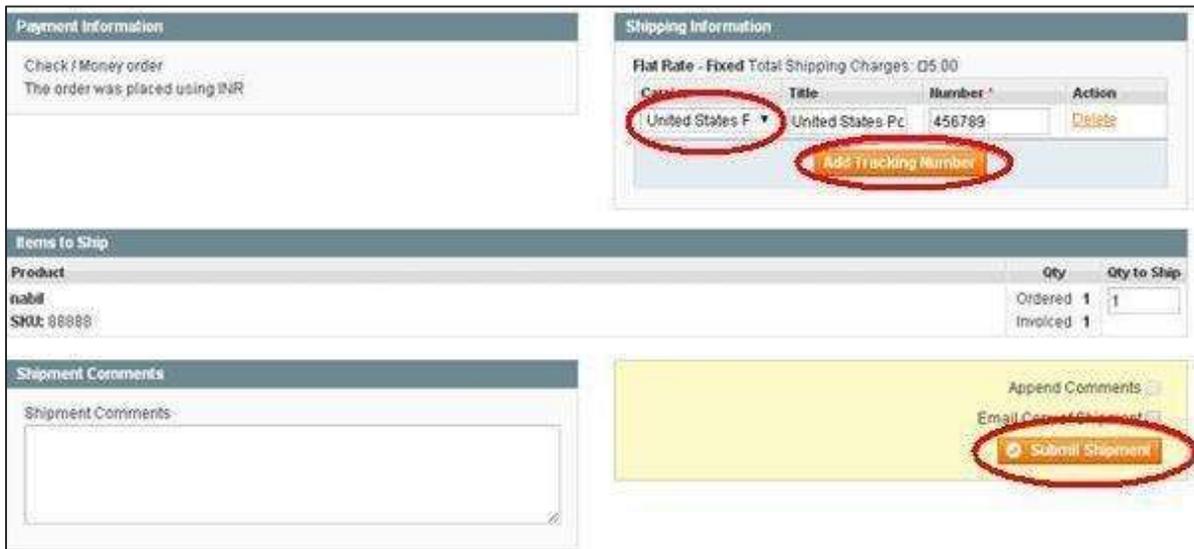
Step (7): Now the order will get processed and gets accepted into the system. Alert the customer about the product order by sending an e-mail. Type your comment in the text area and click on the **Submit Comment** button.



Step (8): The product is shipped and you need to update the customer on their order status. Enter the completed order into the system and notify the customer regarding shipping of your product by clicking on the **Ship** button.



Step (9): Under **Shipping Information** section, click on the **Add Tracking Number** button and choose your **Carrier** from the dropdown menu and put the tracking number of your order and click on the **Submit Shipment** button.



Step (10): It will notify the customer regarding status of the product shipping. Type your comments and click on the **Submit Comment** button to notify the customer.



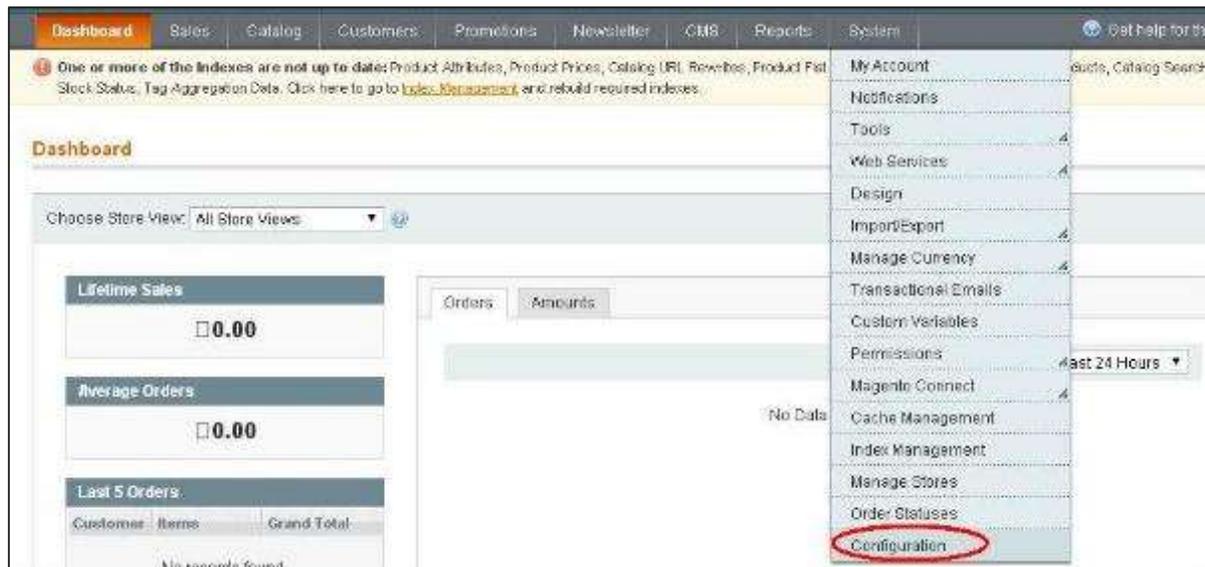
Part 4: System Setup

25. Magento – Set Up Customers

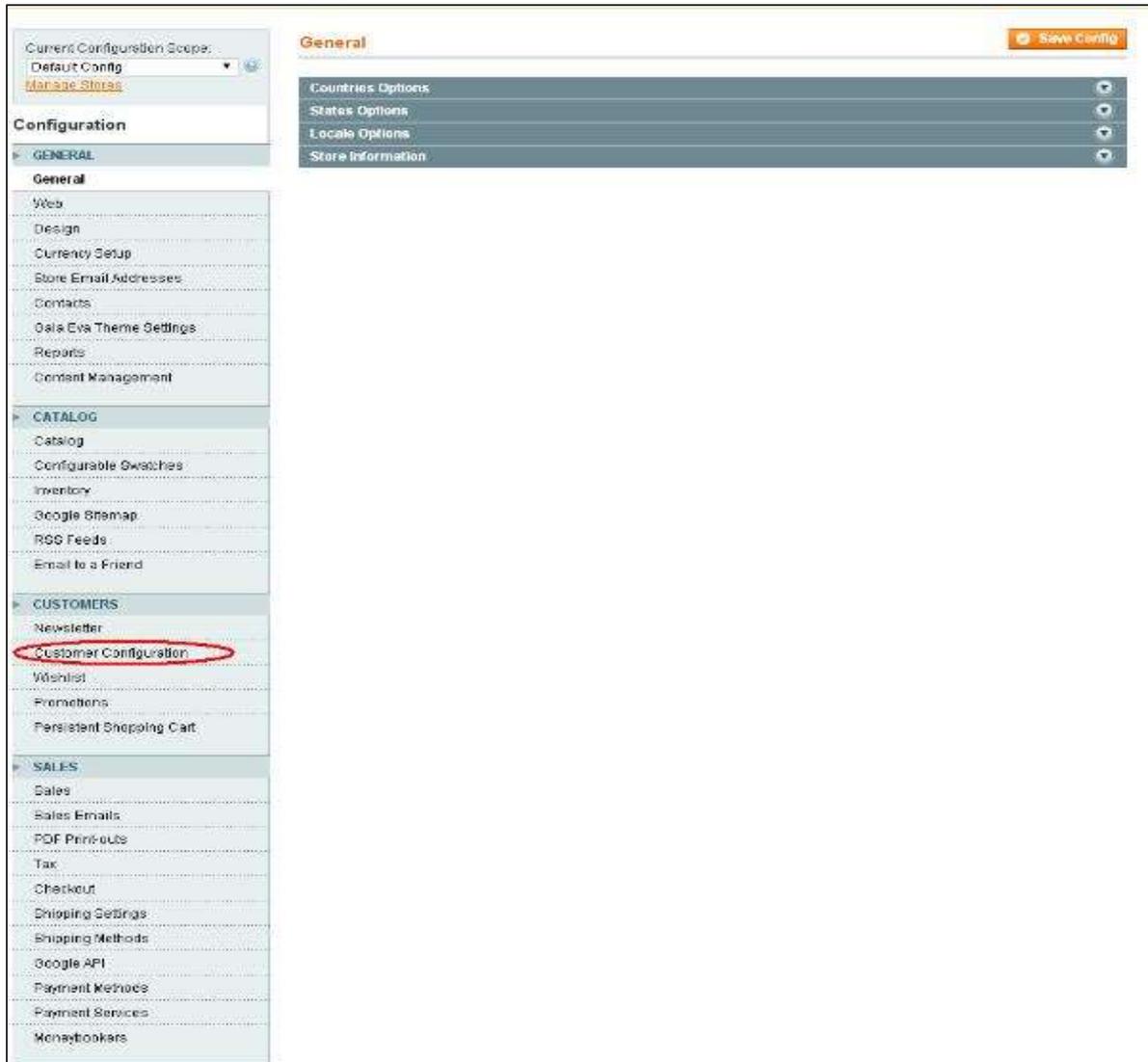
It is necessary to record customer accounts and customer registration process in Magento. This chapter describes the customer settings as shown in the following steps.

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): Click on the **Customer Configuration** option under **CUSTOMERS** section on the left side navigation bar.



Step (4): Expand the **Account Sharing Options** panel which includes the field **Share Customer Accounts** that is set to **Per Website** value. This determines that customers can use this account to login only on particular website. Next, expand the **Online Customers Options** panel and set the interval time for **Online Minutes Interval** option. By default, it is empty and value is set to 15 minutes.

Customer Configuration
Save Config

Account Sharing Options ▲

Share Customer Accounts	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Per Website ▼</div>	[GLOBAL]
-------------------------	---	----------

Online Customers Options ▲

Online Minutes Interval	<input style="width: 90%;" type="text"/>	[GLOBAL]
<small>▲ Leave empty for default (15 minutes).</small>		

Step (5): The **Create New Account Options** panel contains following fields. Fill up all the fields as provided in the screen and click on **Save Config** button to save your changes.

Create New Account Options ▲

Enable Automatic Assignment to Customer Group	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">No ▼</div>	[STORE VIEW]
<small>▲ To show VAT number on frontend, set Show VAT Number on Frontend option to Yes.</small>		
Default Group	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">General ▼</div>	[STORE VIEW]
Default Value for Disable Automatic Group Changes Based on VAT ID	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">No ▼</div>	[GLOBAL]
Show VAT Number on Frontend	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">No ▼</div>	[WEBSITE]
Default Email Domain	<input style="width: 90%;" type="text" value="example.com"/>	[STORE VIEW]
Default Welcome Email	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">New account (Default Template from Locale) ▼</div>	[STORE VIEW]
Email Sender	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">General Contact ▼</div>	[STORE VIEW]
Require Emails Confirmation	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">No ▼</div>	[WEBSITE]
Confirmation Link Email	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">New account confirmation key (Default Templa ▼</div>	[STORE VIEW]
Welcome Email	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">New account confirmed (Default Template fron ▼</div>	[STORE VIEW]
<small>▲ This email will be sent instead of default welcome email, after account confirmation.</small>		
Generate Human-Friendly Customer ID	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">No ▼</div>	[GLOBAL]

Step (6): The **Password Options** panel has some settings:

Password Options		
Forgot Email Template	Forgot Password (Default Template from Loca	[STORE VIEW]
Remind Email Template	Remind Password (Default Template from Loc	[STORE VIEW]
Forgot and Remind Email Sender	Customer Support	[STORE VIEW]
Recovery Link Expiration Period (days)	1 <small>Please enter a number 1 or greater in this field.</small>	[GLOBAL]
Require admin user to change user password	Yes	[GLOBAL]

- **Forgot Email Template:** It helps to reset the customer's password, if the customer's forgot their password.
- **Remind Email Template:** It changes the template for particular e-mail transaction.
- **Forgot and Remind Email Sender:** It selects an e-mail address which sends password message to the customer which are displayed from the fields of **Forgot and Remind mail Template.**
- **Recovery Link Expiration Period:** It specifies for how many days the recovery link will be active for resetting password.

Step (7): The **Login Options** panel has an option called **Redirect Customer to Account Dashboard after Logging in** which is set to Yes by default. If you set it to No, customers will stay on the current page. After done with the settings, click on the **Save Config** button to save your changes.

Customer Configuration Save Config

- Account Sharing Options
- Online Customers Options
- Create New Account Options
- Password Options
- Name and Address Options
- Login Options**

Redirect Customer to Account Dashboard after Logging in: Yes [WEBSITE]
Customer will stay on the current page if "No" is selected.

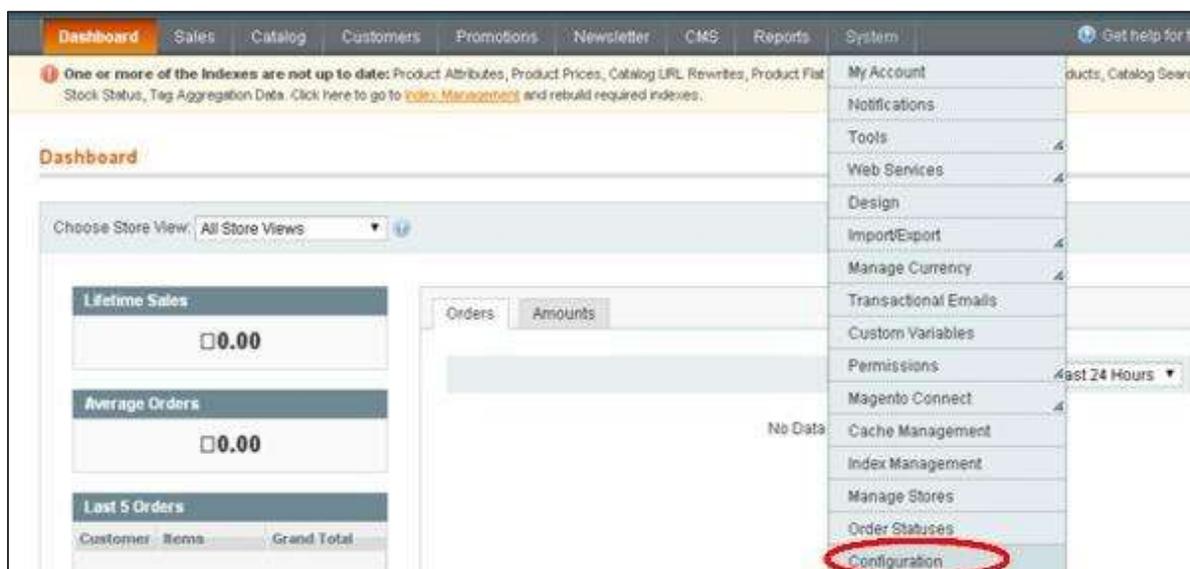
26. Magento – Set Up Google Analytics

Google Analytics, is Google's web analytics service for those who are actively managing websites. It adds analytics to Magento store including E-commerce tracking and conversions of their websites. It allows administrators to monitor their website's traffic.

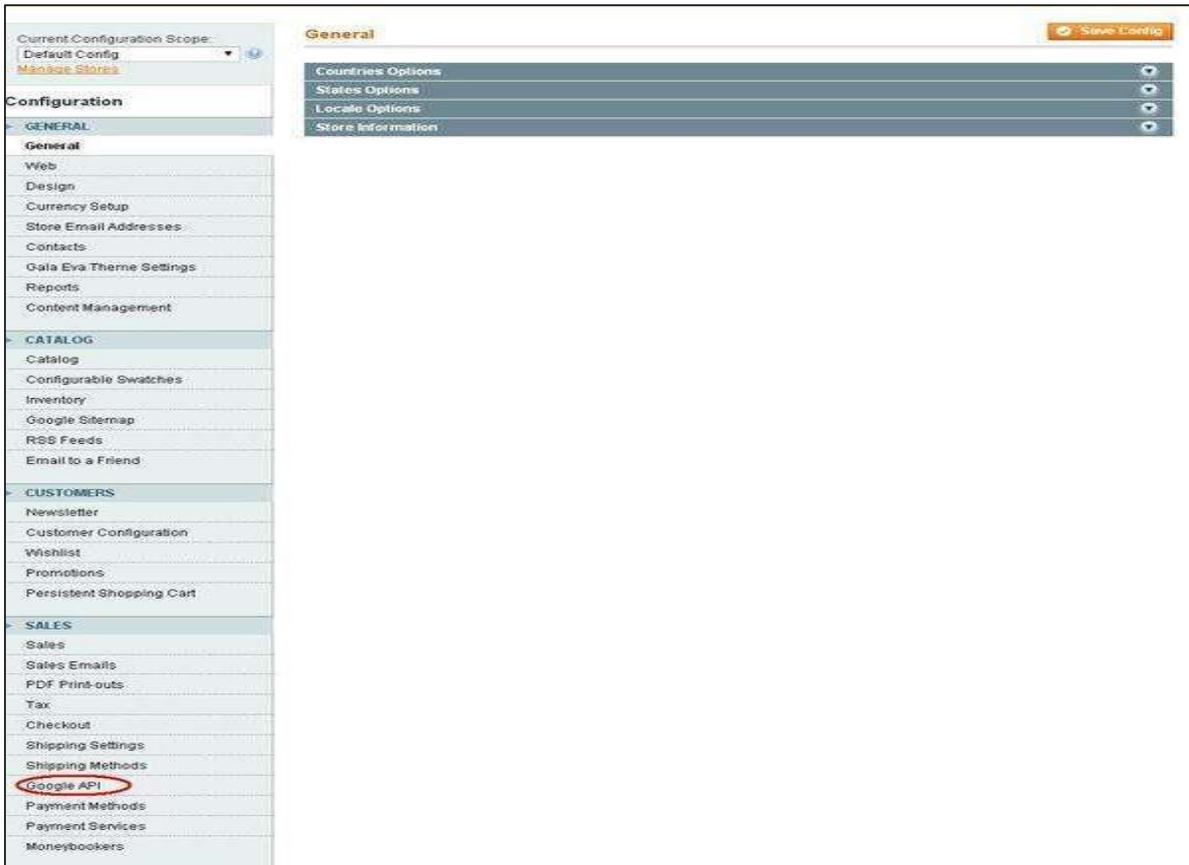
The following steps help you set up Google Analytics in Magento store:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to the **System** menu and click on the **Configuration** option.



Step (3): On the left side of the navigation bar, click on the **Google API** option under **Sales** section.



Step (4): Expand the **Google Analytics** panel which shows some settings such as:

- **Enable** option should be set to Yes to activate payment method
- **Type** option provides two types: Google Analytics and Universal Analytics
- **Account Number** accepts your account number
- **Enable IP anonymization** option should be set to Yes.

After done with the settings, click on the **Save Config** button to save the changes that you have made.

The screenshot shows the 'Google API' configuration page. In the top right corner, the 'Save Config' button is highlighted with a red circle. Below it is a 'Google Analytics' configuration section with the following fields:

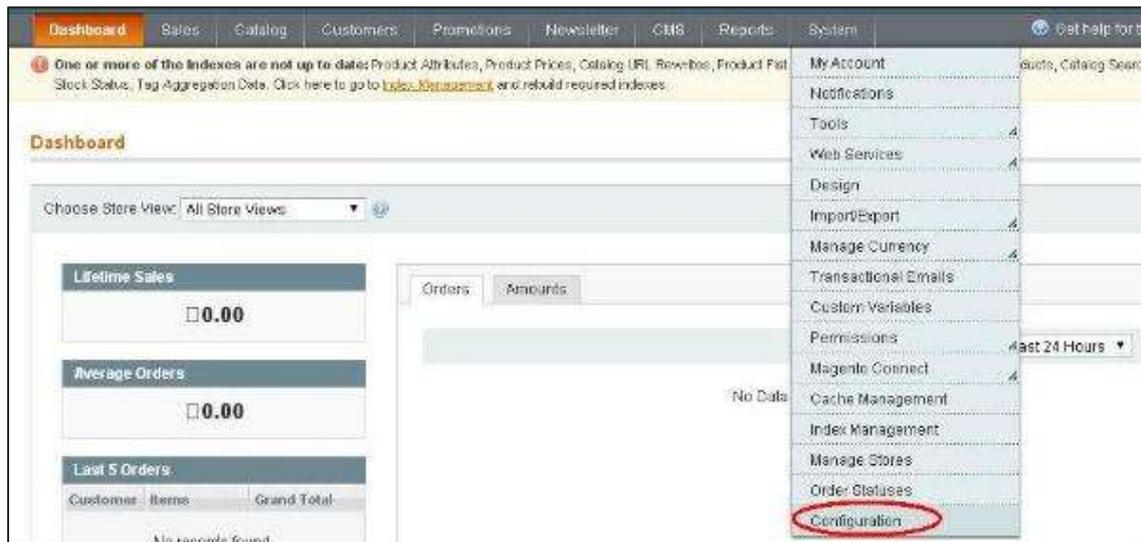
Field Name	Value	Action
Enable	Yes	[STORE VIEW]
Type	Google Analytics	[STORE VIEW]
▲ The tracking code to use.		
Account Number		[STORE VIEW]
Enable IP anonymization	Yes	[STORE VIEW]

27. Magento – Set Up URLs

You can use Magento to build for more user and search engine friendly URLs as shown in the following steps.

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): On the left side navigation bar, click on the **Web** option under **General** section.



Step (4): When page loads, expand the **Search Engines Optimization** option. Set the option **Use Web Server Rewrites** to **Yes** to enable the Search Engine Friendly (SEF) URLs in Magento. If you select the option as **No**, then Magento will not use SEF URLs. Click on the **Save Config** button and your Magento SEF URLs will be enabled.

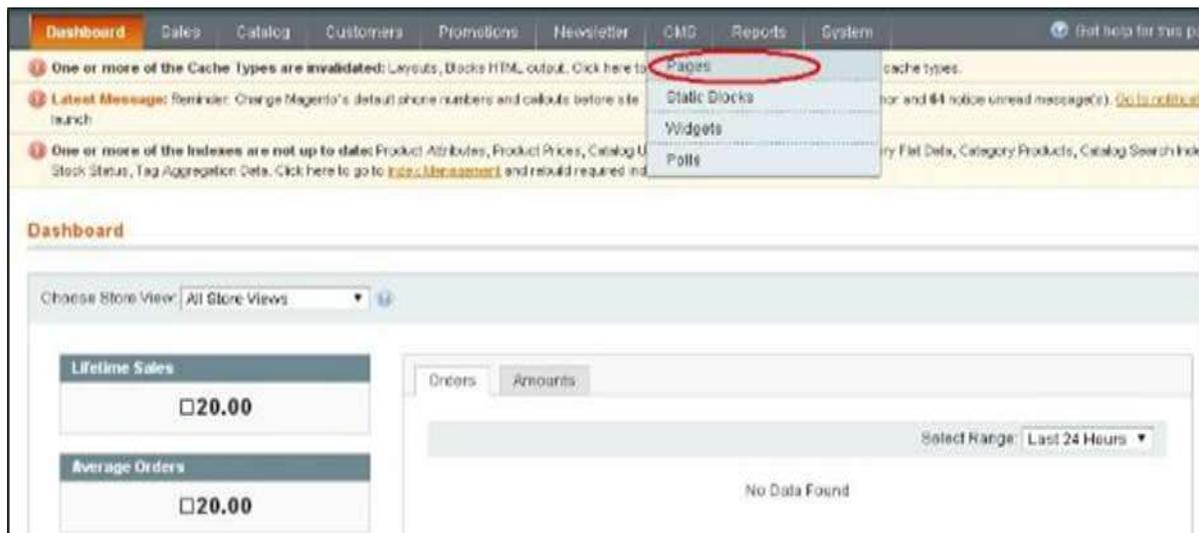


28. Magento – Set Up Youtube Video

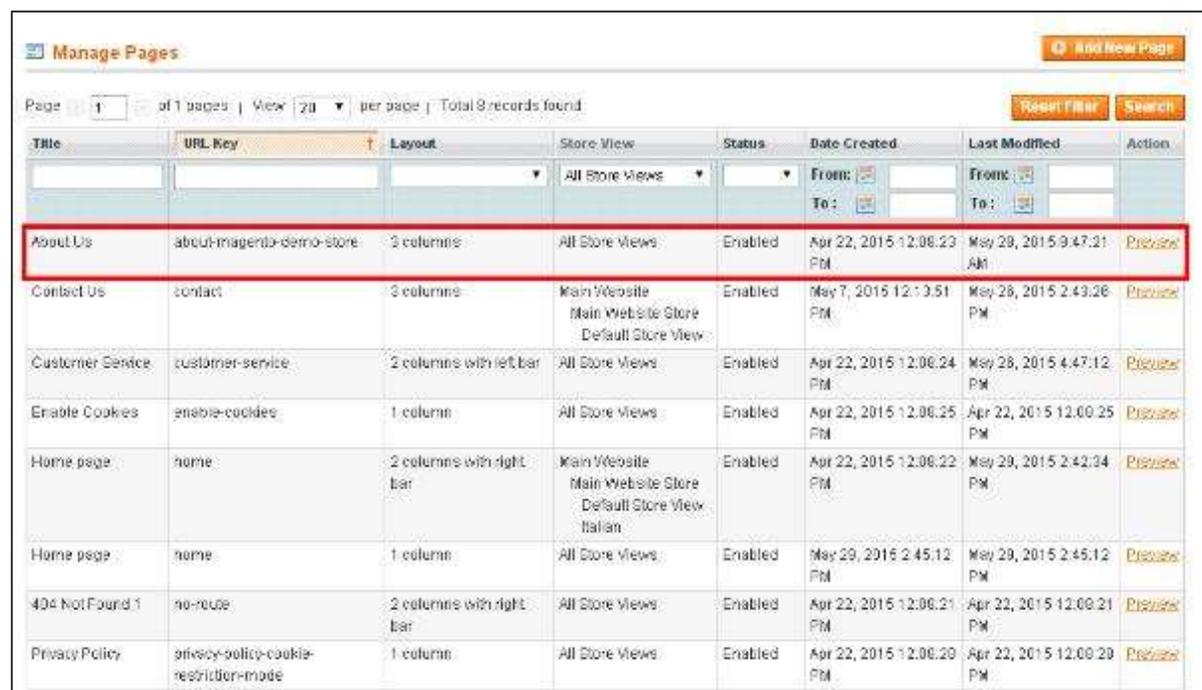
In this chapter, we will learn how to set up YouTube videos to your Magento store as shown in the following steps.

Step (1): Login to Magento Admin Panel.

Step (2): Go to **CMS** menu and click on **Pages** option.

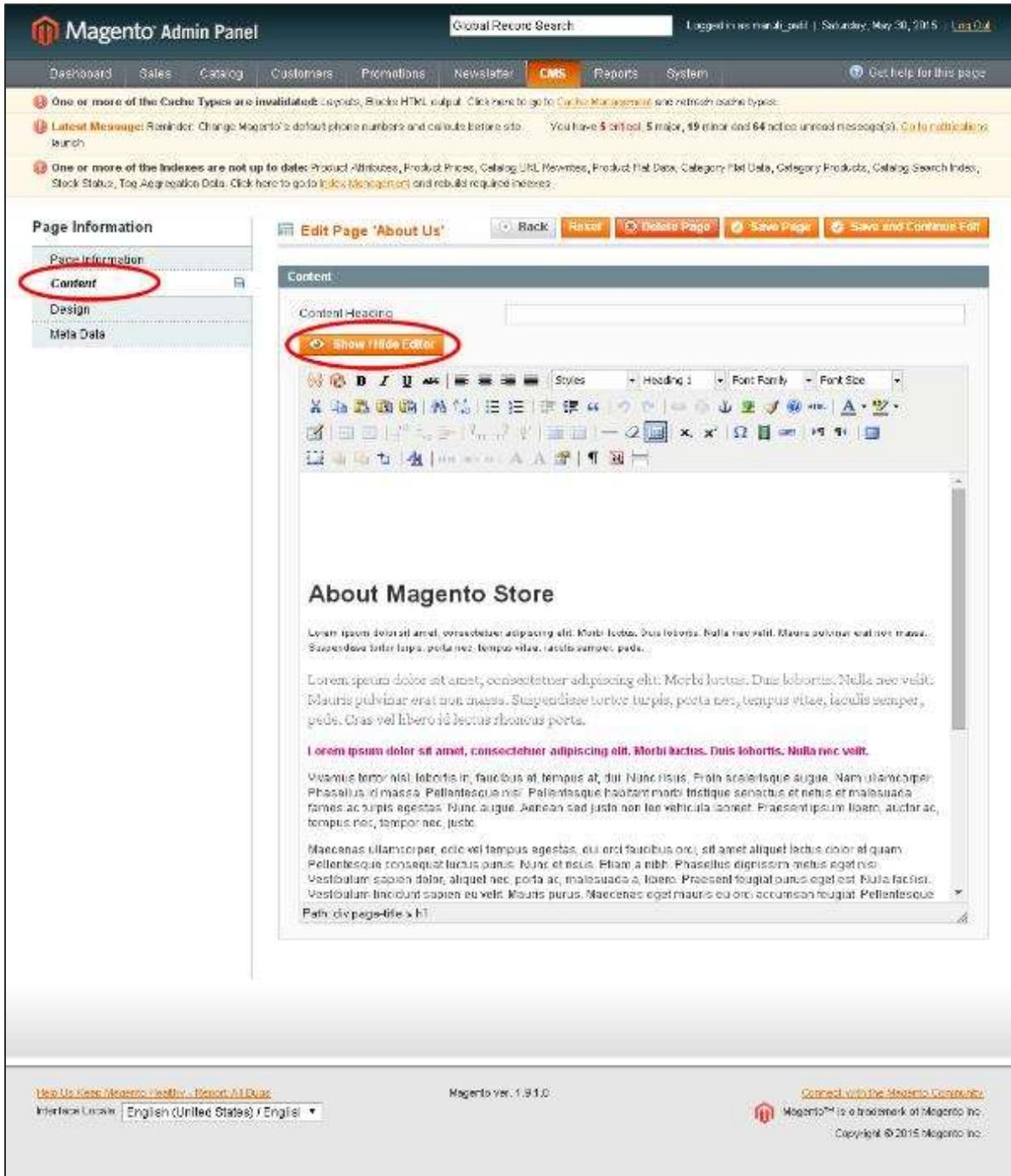


Step (3): You will get the list of pages where you can create a new page or edit an existing page. Here we have selected the **About Us** page to add YouTube video in it.



Title	URL Key	Layout	Store View	Status	Date Created	Last Modified	Action
About Us	about-magento-demo-store	3 columns	All Store Views	Enabled	Apr 22, 2015 12:08:23 PM	May 28, 2015 9:47:21 AM	Preview
Contact Us	contact	3 columns	Main Website Main Website Store Default Store View	Enabled	May 7, 2015 12:13:51 PM	May 28, 2015 2:49:26 PM	Preview
Customer Service	customer-service	2 columns with left bar	All Store Views	Enabled	Apr 22, 2015 12:08:24 PM	May 28, 2015 4:47:12 PM	Preview
Enable Cookies	enable-cookies	1 column	All Store Views	Enabled	Apr 22, 2015 12:08:25 PM	Apr 22, 2015 12:08:25 PM	Preview
Home page	home	2 columns with right bar	Main Website Main Website Store Default Store View Italian	Enabled	Apr 22, 2015 12:08:22 PM	May 28, 2015 2:42:34 PM	Preview
Home page	home	1 column	All Store Views	Enabled	May 29, 2015 2:45:12 PM	May 29, 2015 2:45:12 PM	Preview
404 Not Found.1	no-route	2 columns with right bar	All Store Views	Enabled	Apr 22, 2015 12:08:21 PM	Apr 22, 2015 12:08:21 PM	Preview
Privacy Policy	privacy-policy-cookie-restriction-mode	1 column	All Store Views	Enabled	Apr 22, 2015 12:08:20 PM	Apr 22, 2015 12:08:20 PM	Preview

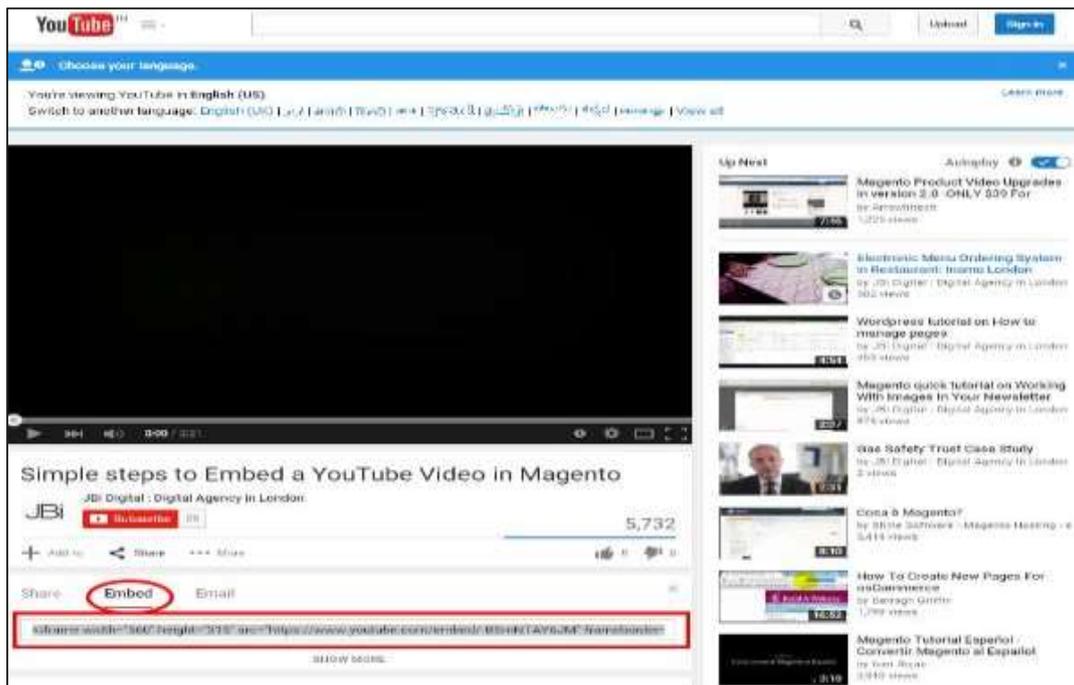
Step (4): On the left menu, click on the **Content** option which displays the information of the page. **The Show/Hide Editor** button can be used to hide or show the editor.



Step (5): Open the www.youtube.com website and find the video you want to add. There is a **Share** button under the video, click on it.



Step (6): Under the **Share** button, click on the **embed** link. It opens a small text area, then copy the code.



Step (7): Go to your page and paste the code which was copied from the **embed** field and click on the **Save Page** button.



Step (8): Open your website and you can see the video on the page you just edited.

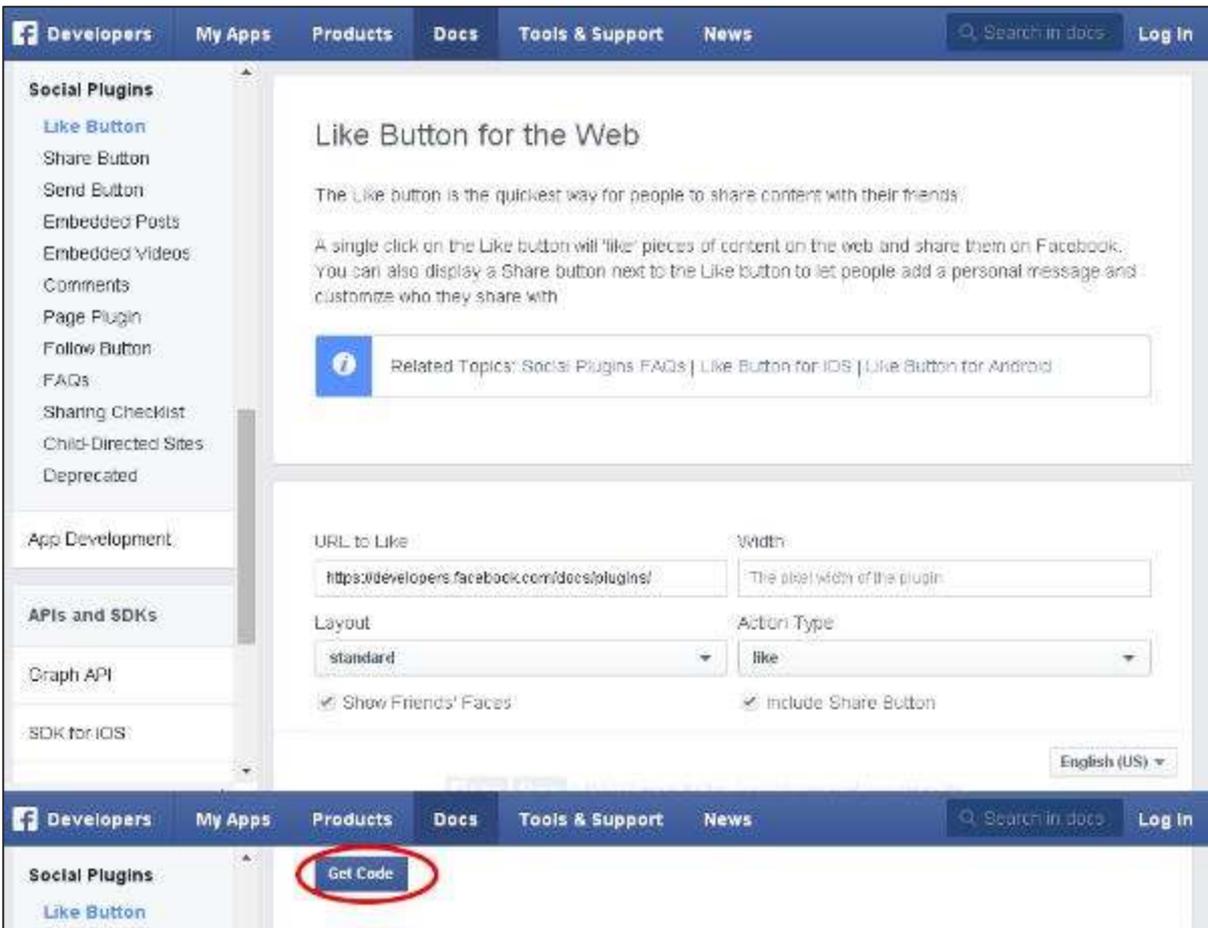


29. Magento – Set Up Facebook Likes

Social networks such as Facebook, Twitter and Google Plus have become powerful for promoting the web shops. Facebook provides "Like" button which allows users to share contents of the products across the web.

The following steps show you how to add Facebook **Like** button for your Magento products:

Step (1): Go to developer site of Facebook <https://developers.facebook.com/docs/plugins/like-button> and click on **Get Code** button.



The screenshot displays the Facebook Developers 'Like Button for the Web' configuration interface. The page title is 'Like Button for the Web'. Below the title, there is a brief description: 'The Like button is the quickest way for people to share content with their friends.' and 'A single click on the Like button will "like" pieces of content on the web and share them on Facebook. You can also display a Share button next to the Like button to let people add a personal message and customize who they share with.' Below this, there is a 'Related Topics' section with links for 'Social Plugins FAQs', 'Like Button for iOS', and 'Like Button for Android'. The main configuration area includes the following fields and options:

- URL to Like:**
- Width:**
- Layout:** (dropdown menu)
- Action Type:** (dropdown menu)
- Show Friends' Faces
- Include Share Button
- Language:** (dropdown menu)

At the bottom of the page, a blue button labeled 'Get Code' is highlighted with a red circle.

Step (2): When you click on the **Get Code** button, a window will get appear as shown in the following screen.

Your Plugin Code ✕

1. Include the JavaScript SDK on your page once, ideally right after the opening <body> tag.

```
<div id="fb-root"></div>
<script>(function(d, s, id) {
  var js, fjs = d.getElementsByTagName(s)[0];
  if (d.getElementById(id) return;
  js = d.createElement(s); js.id = id;
  js.src = "//connect.facebook.net/en_US/sdk.js#xfbml=1&version=v2.3";
  fjs.parentNode.insertBefore(js, fjs);
})(document, 'script', 'facebook-jssdk');
```

2. Place the code for your plugin wherever you want the plugin to appear on your page.

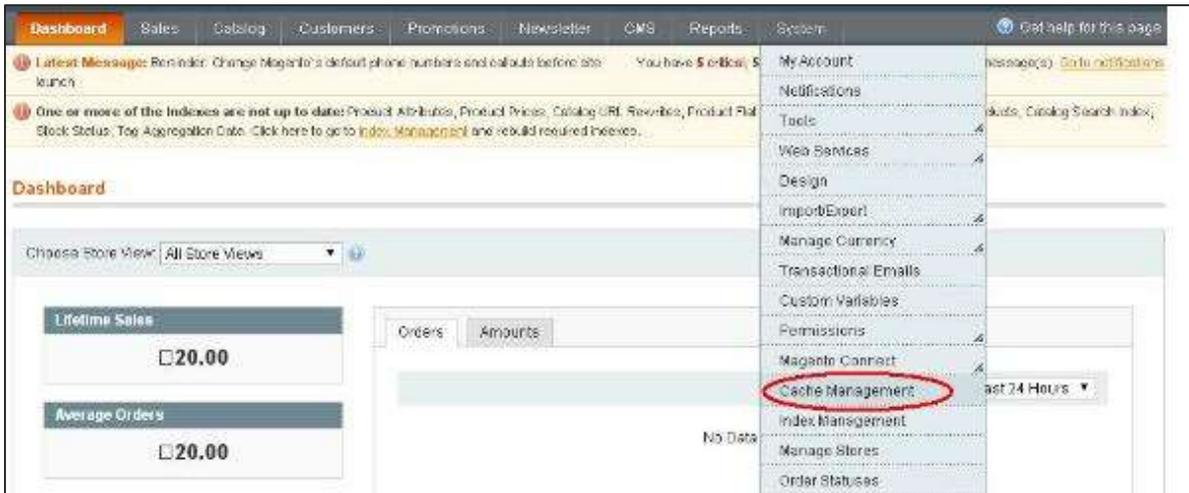
```
<div class="fb-like" data-href="https://developers.facebook.com/docs/plugins/"
data-layout="standard" data-action="like" data-show-faces="true" data-share="true">
</div>
```

Step (3): Open the file, i.e., `/app/design/frontend/base/default/template/productalert/product/view.phtml` in the Magento and paste the below code around the line 50.

```
<div class="fb-like" data-href="https://developers.facebook.com/docs/plugins/"
data-layout="standard" data-action="like" data-show-faces="true" data-
share="true">

</div>
```

Step (4): Go to the **System** menu and click on the **Cache Management** to refresh the cache.



Step (5): Under **Cache Storage Management** section, select the items from the Cache Type column for which you need to refresh the cache. Select the **Refresh** option from the **Actions** field on the right hand corner and click on **Submit** button to refresh the cache.



Step (6): After refreshing cache, logout from your admin panel and re-login. Refresh your product view page to see the Facebook like button.

30. Magento – Set Up Translation

You can translate Magento default frontend through csv file as specified below:

Look into your (root)/app/locale/en_US folder. There you have .csv's that do the translating. The **Mage_Catalog.csv** contains the translations for all the files that use the **/app/code/core/Mage/Catalog/classes** and **/app/design/frontend/default/default/locale/en_US/translate.csv** template files. Here, you'll also find **Mage_Adminhtml.csv**, which handles most of the admin translations.

If Magento translation fails, you should check the settings for store in admin panel, to see if there is something wrong with your locale.

- On the Magento Admin Panel, go to **System** menu and click on the **Configuration** option.
- Select the Configuration Scope of the store view in the upper left corner.

On the General configuration page, expand the **Locale Options** section.

Under **Locale Options**, set Locale to the new language for the store view and click the Save Config button.

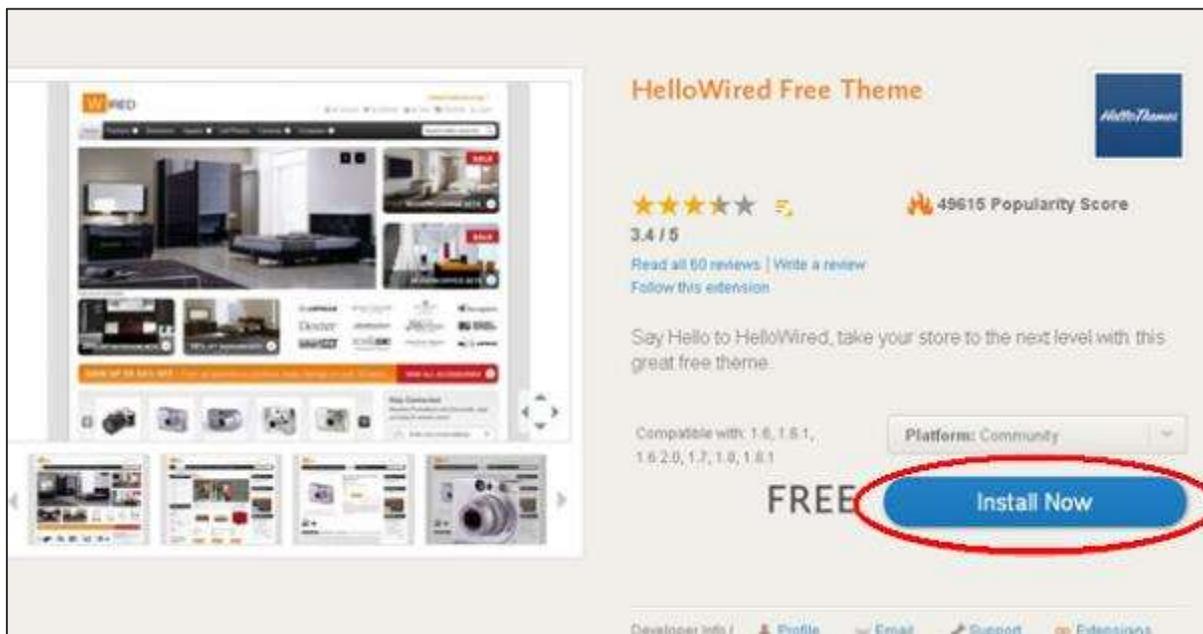


31. Magento – Set Up System Theme

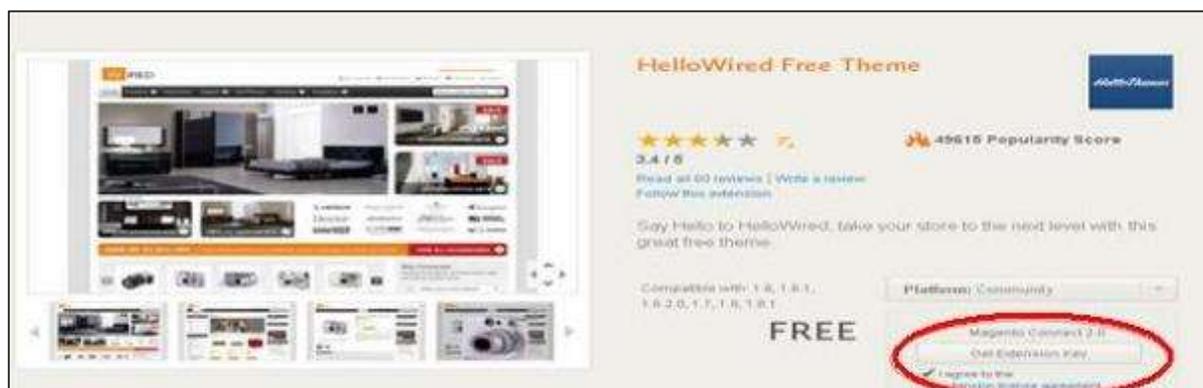
This chapter describes how to install new Magento theme on your store's frontend. You can use Magento Connect to install theme. For installing theme, you need to get the extension key and then use it for the installation through Magento Connect.

We will see how to get extension key by using the Magento theme.

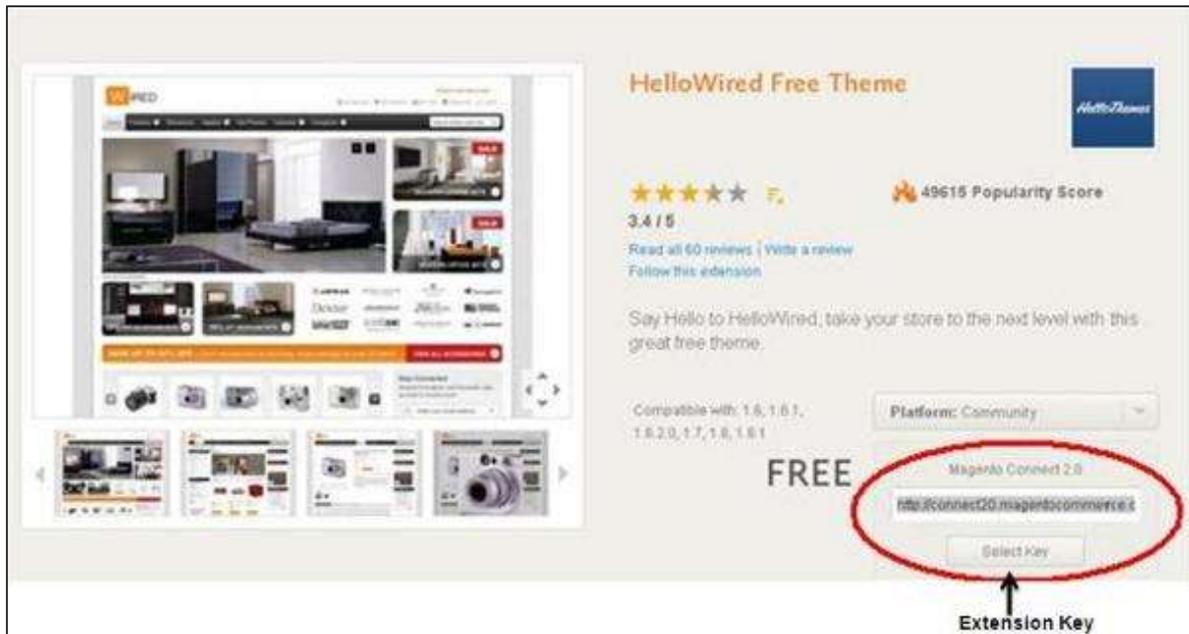
Step (1): Go to Magento theme page and then click on the **Install Now** button. You need to register a new account or login with an existing account to get extension key.



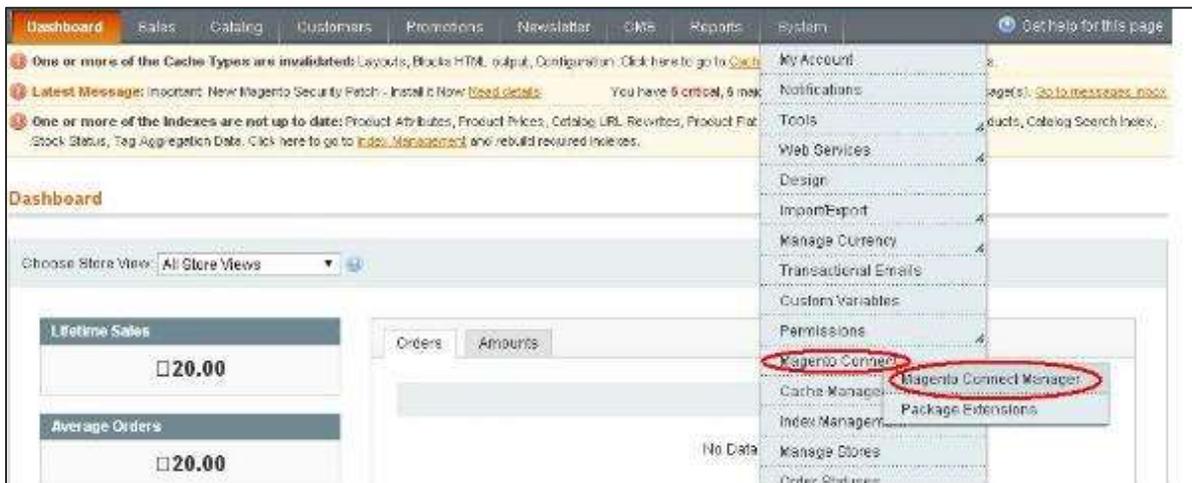
Step (2): Check, **I Agree to the Extension license agreement** option and click on the **Get Extension Key** button.



Step (3): Click the **Select Key** button and copy the extension key.

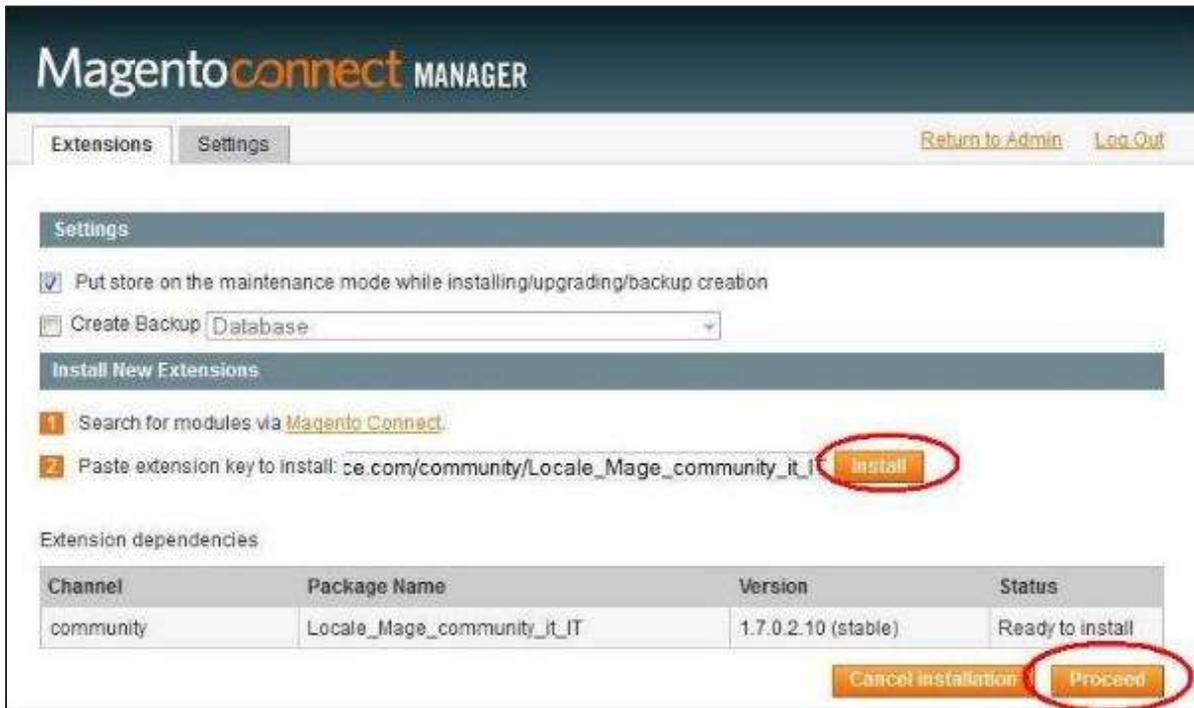


Step (4): Now login to your Magento Admin Panel and go to the **System --> Magento Connect --> Magento Connect Manager** option.

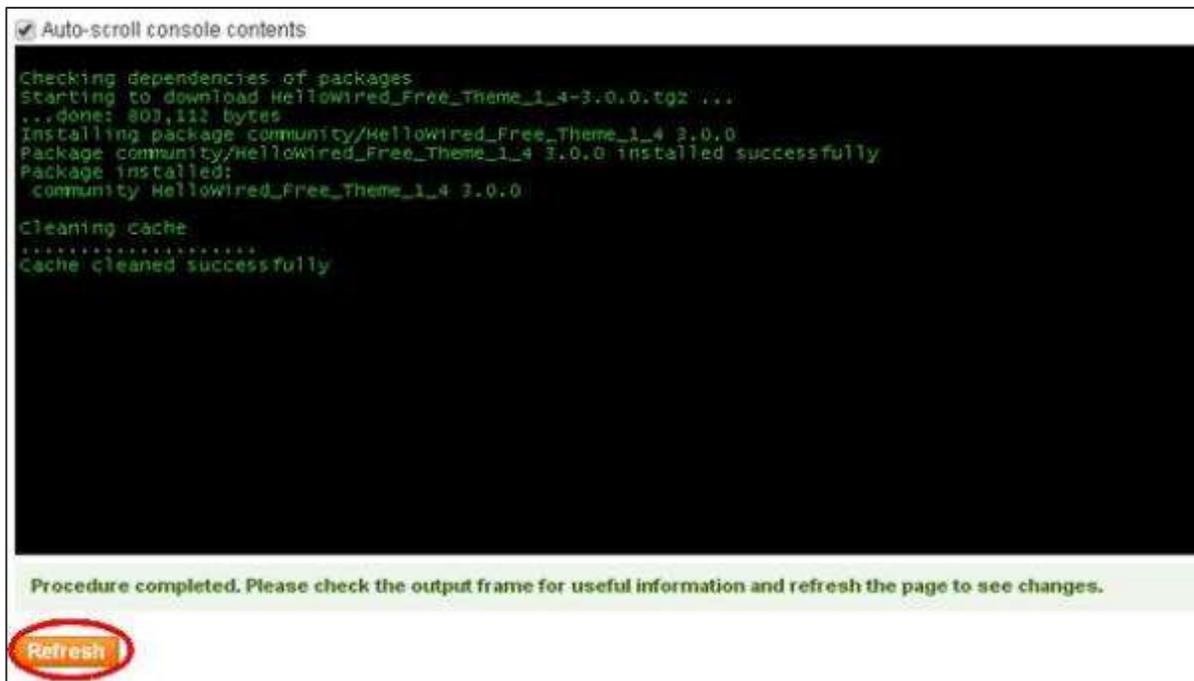


Step (5): Again, it will ask for login, enter your credentials to redirect to **Magento Connect Manager** window.

Step (6): Now under **Extensions** section, paste the **Extension Key** (that you copied in step 2) and click on **Install** button. It will display status as "Ready to install" and click on **Proceed** button to install the language.



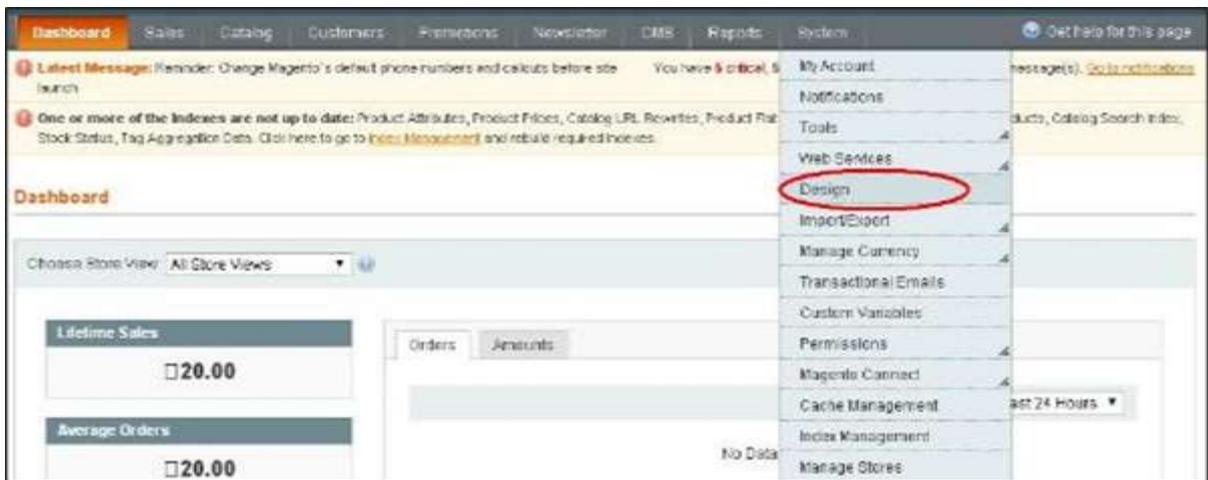
Step (7): It will check for dependencies of packages and display the message as Cache cleaned successfully.



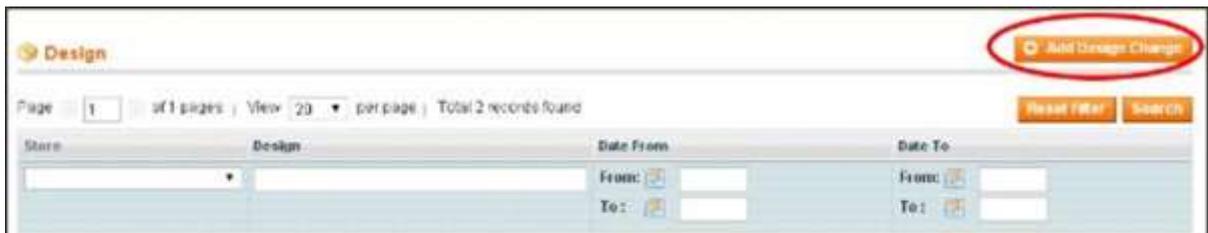
Step (8): Refresh the page by clicking on the **Refresh** button and go to an admin dashboard page by clicking on **Return to Admin** link.



Step (9): To activate the theme on your store's frontend, go to **System** menu and click on the **Design** option.



Step (10): To add a new theme, click on the **Add Design Change** button.



Step (11): Select the theme from the **Custom Design** dropdown menu and click the **Save** button to apply your theme for the store.

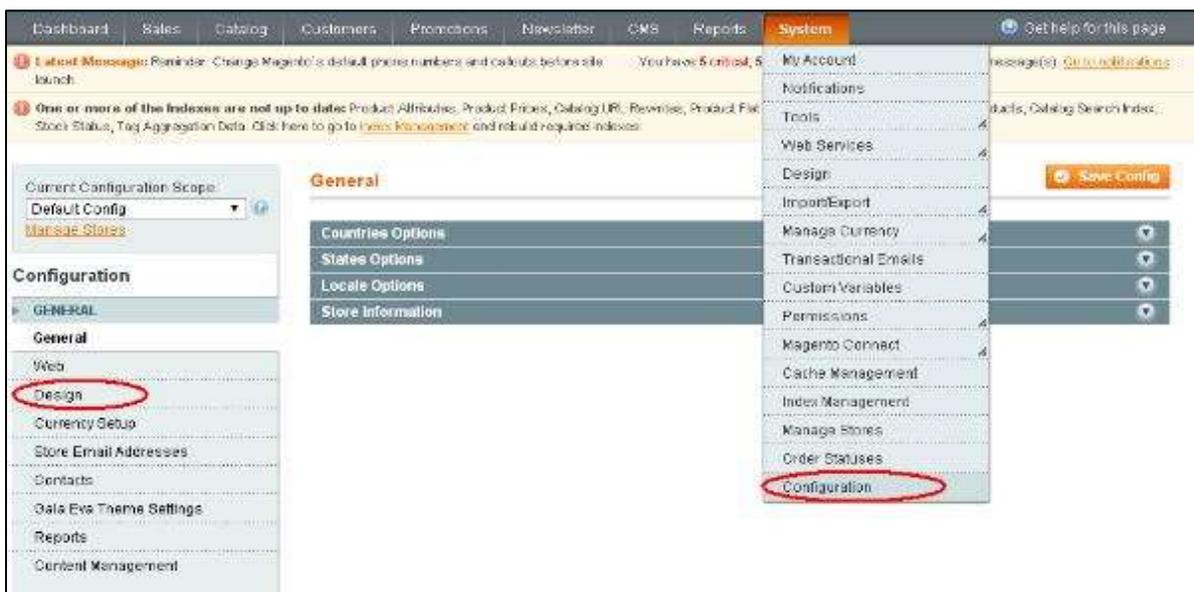


32. Magento – Set Up Page Title

Magento allows changing the default title of your website. The following steps describe how to change the title of Magento store.

Step (1): Login to your Magento Admin Panel.

Step (2): Go to the **System** menu, click on the **Configuration** option and select the **Design** option under the **General** section.



Step (3): Expand the **HTML Head** panel and you can edit the title in Default Title field. After done with the settings, click on the **Save Config** button.



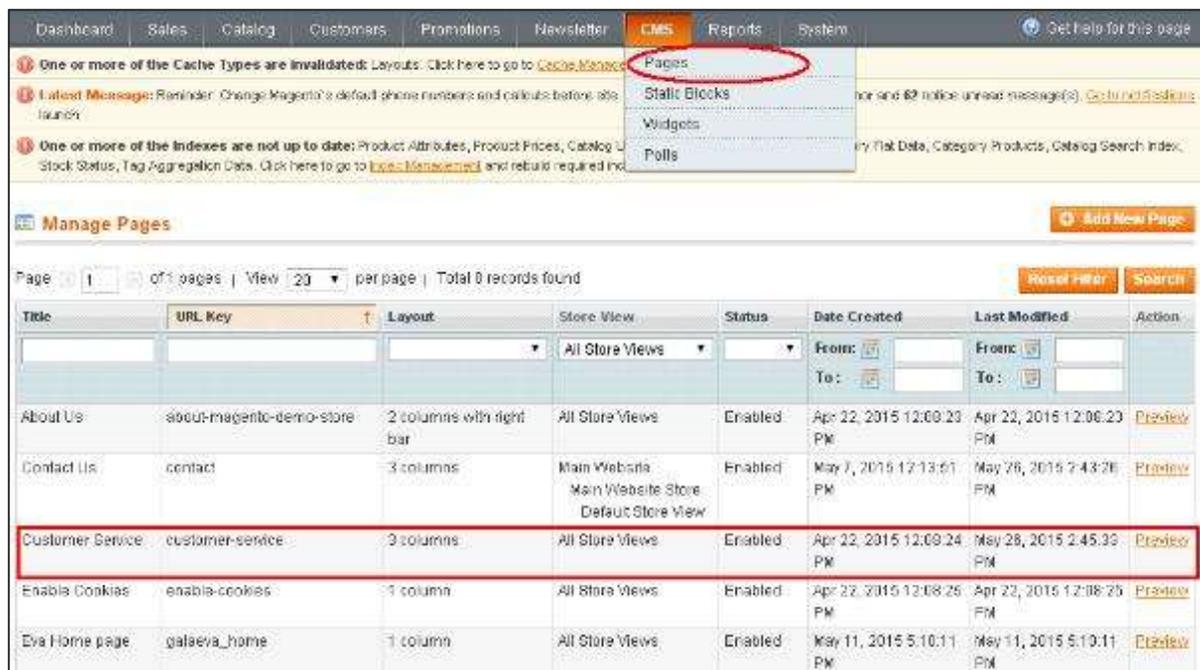
33. Magento – Set Up Page Layout

Layout files are useful in rendering front pages of Magento. Using Magento, it's easy to change the layout of pages.

This chapter describes how to create page layout in Magento:

Step (1): Login to your Magento Admin Panel.

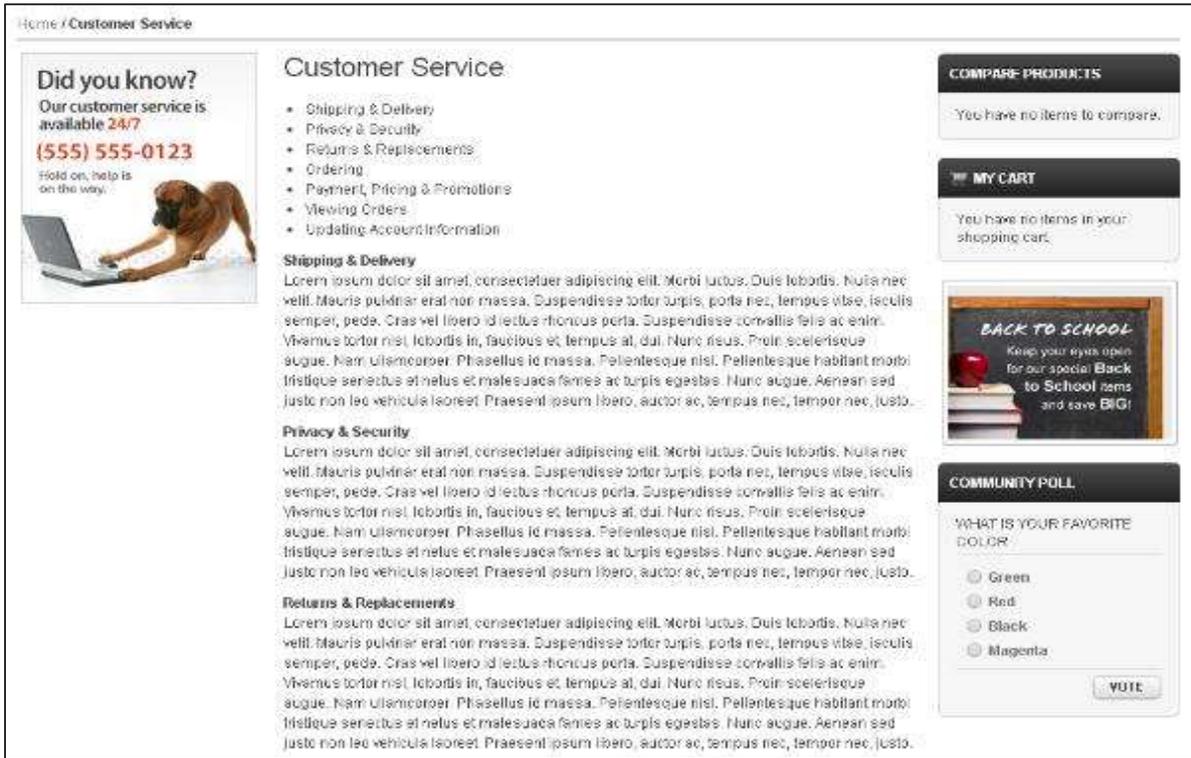
Step (2): Go to **CMS** menu and click on the **Pages** option to list out all the pages of Magento. Select the page for which you want to change the layout.



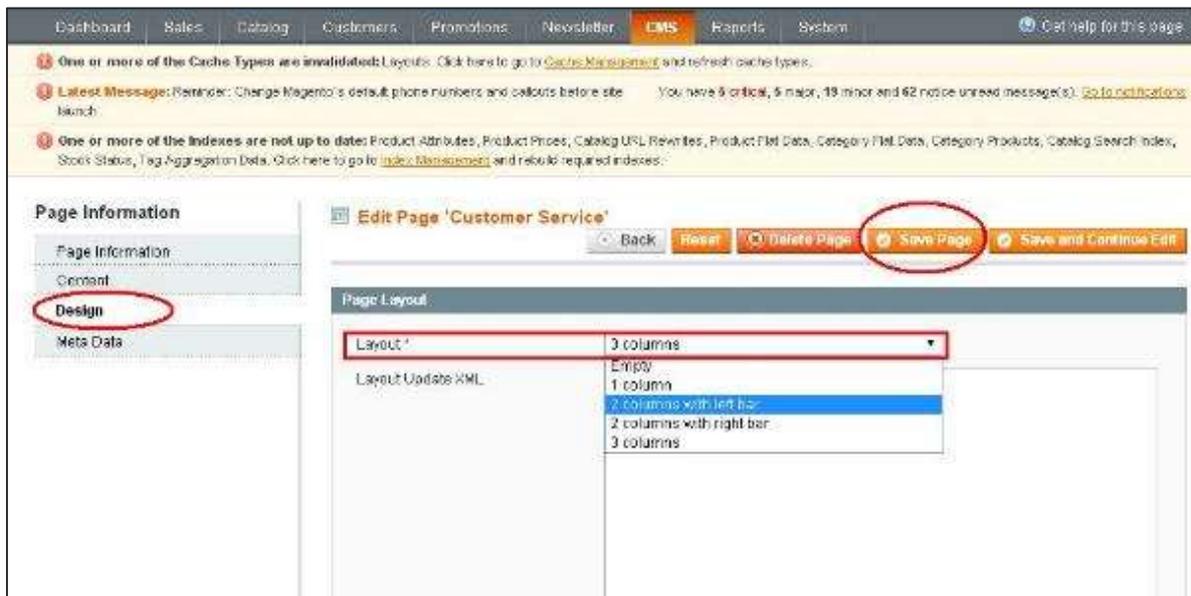
The screenshot shows the Magento Admin Panel interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Customers', 'Promotions', 'Newsletter', 'CMS', 'Reports', and 'System'. The 'CMS' menu is expanded, showing 'Pages', 'Static Blocks', 'Widgets', and 'Polls'. The 'Pages' option is circled in red. Below the navigation bar, there are several system messages. The main content area is titled 'Manage Pages' and features a table with the following columns: Title, URL Key, Layout, Store View, Status, Date Created, Last Modified, and Action. The table contains several rows, with the 'Customer Service' row highlighted in red. The 'Customer Service' row has a URL Key of 'customer-service', a Layout of '3 columns', and is enabled for all store views.

Title	URL Key	Layout	Store View	Status	Date Created	Last Modified	Action
About Us	about-magento-demo-store	2 columns with right bar	All Store Views	Enabled	Apr 22, 2015 12:00:23 PM	Apr 22, 2015 12:00:23 PM	Preview
Contact Us	contact	3 columns	Main Website Main Website Store Default Store View	Enabled	May 7, 2015 12:13:51 PM	May 26, 2015 2:43:26 PM	Preview
Customer Service	customer-service	3 columns	All Store Views	Enabled	Apr 22, 2015 12:09:24 PM	May 28, 2015 2:45:39 PM	Preview
Enable Cookies	enable-cookies	1 column	All Store Views	Enabled	Apr 22, 2015 12:08:25 PM	Apr 22, 2015 12:08:25 PM	Preview
Eva Home page	galeeva_home	1 column	All Store Views	Enabled	May 11, 2015 5:10:11 PM	May 11, 2015 5:10:11 PM	Preview

Step (3): Click on the **Preview** button to see structure of the page.



Step (4): To see the layout of the page, click on the 3 columns option under Layout tab. It will open the **Page Information** section. Click on the **Design** option. Select the option as per your choice in the Layout field and click the **Save Page** button to apply the changes.



Step (5): When you click on the **Preview** link, it will display the changed layout of the page.

The page has been saved.

Manage Pages [Add New Page](#)

Page 1 of 1 pages | View 20 per page | Total 8 records found [Reset Filter](#) [Search](#)

Title	URL Key	Layout	Store View	Status	Date Created	Last Modified	Action
About Us	about-magento-demo-store	2 columns with right bar	All Store Views	Enabled	Apr 22, 2015 12:08:23 PM	Apr 22, 2015 12:08:23 PM	Preview
Contact Us	contact	3 columns	Main Website Main Website Store Default Store View	Enabled	May 7, 2015 12:13:51 PM	May 28, 2015 2:43:28 PM	Create
Customer Service	customer-service	3 columns	All Store Views	Enabled	Apr 22, 2015 12:08:24 PM	May 26, 2015 4:44:51 PM	Preview
Enable Cookies	enable-cookies	1 column	All Store Views	Enabled	Apr 22, 2015 12:08:25 PM	Apr 22, 2015 12:08:25 PM	Preview
Eva Home page	galaxia_home	1 column	All Store Views	Enabled	May 11, 2015 5:10:11 PM	May 11, 2015 5:10:11 PM	Create
Home	home	2 columns with right bar	Main Website Main Website Store Default Store View	Enabled	Apr 22, 2015 12:08:22 PM	May 11, 2015 4:35:51 PM	Preview

Home / **Customer Service**

Did you know?
Our customer service is available 24/7
(555) 555-0123
Hold on, help is on the way.



Customer Service

- Shipping & Delivery
- Privacy & Security
- Returns & Replacements
- Ordering
- Payment, Pricing & Promotions
- Viewing Orders
- Updating Account Information

Shipping & Delivery
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi luctus. Duis lobortis. Nulla nec velit. Mauris pulvinar erat non massa. Suspendisse tortor turpis, porta nec, tempus vitae, laculis semper, pede. Cras vel libero in lectus rhoncus porta. Suspendisse convallis feis ac enim. Vivamus titor nisi, lobortis in, faucibus et, tempus at, dui. Nunc risus. Proin scelerisque augue. Nam ullamcorper Phasellus id massa. Pellentesque nisi. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc augue. Aenean sed justo non leo vehicula laoreet. Praesent ipsum libero, auctor ac, tempus nec, tempor nec, justo.

Privacy & Security
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi luctus. Duis lobortis. Nulla nec velit. Mauris pulvinar erat non massa. Suspendisse tortor turpis, porta nec, tempus vitae, laculis semper, pede. Cras vel libero in lectus rhoncus porta. Suspendisse convallis feis ac enim. Vivamus titor nisi, lobortis in, faucibus et, tempus at, dui. Nunc risus. Proin scelerisque augue. Nam ullamcorper Phasellus id massa. Pellentesque nisi. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc augue. Aenean sed justo non leo vehicula laoreet. Praesent ipsum libero, auctor ac, tempus nec, tempor nec, justo.

Returns & Replacements
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi luctus. Duis lobortis. Nulla nec velit. Mauris pulvinar erat non massa. Suspendisse tortor turpis, porta nec, tempus vitae, laculis semper, pede. Cras vel libero in lectus rhoncus porta. Suspendisse convallis feis ac enim. Vivamus titor nisi, lobortis in, faucibus et, tempus at, dui. Nunc risus. Proin scelerisque augue. Nam ullamcorper Phasellus id massa. Pellentesque nisi. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc augue. Aenean sed justo non leo vehicula laoreet. Praesent ipsum libero, auctor ac, tempus nec, tempor nec, justo.

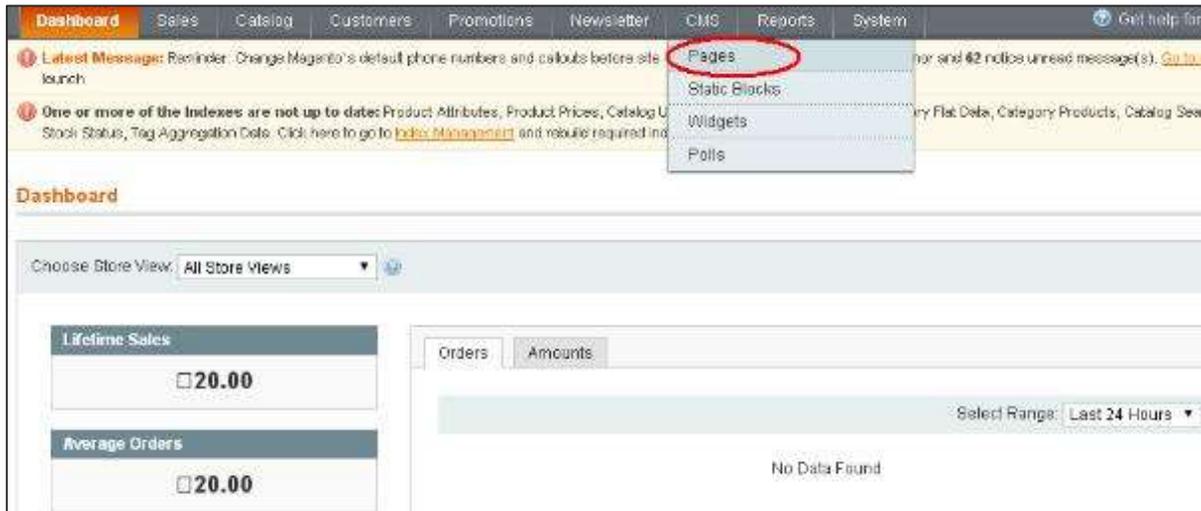
Ordering
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi luctus. Duis lobortis. Nulla nec velit. Mauris pulvinar erat non massa. Suspendisse tortor turpis, porta nec, tempus vitae, laculis semper, pede. Cras vel libero in lectus rhoncus porta. Suspendisse convallis feis ac enim. Vivamus titor nisi, lobortis in, faucibus et, tempus at, dui. Nunc risus. Proin scelerisque augue. Nam ullamcorper Phasellus id massa. Pellentesque nisi. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Nunc augue. Aenean sed justo non leo vehicula laoreet. Praesent ipsum libero, auctor ac, tempus nec, tempor nec, justo.

34. Magento – Set Up New Pages

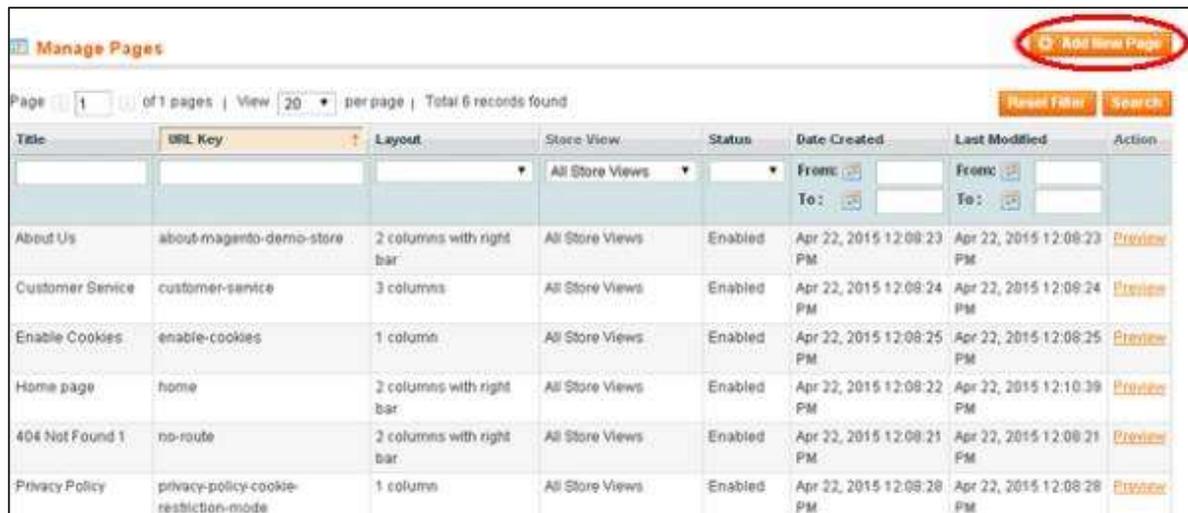
This chapter shows how to create new pages in Magento by using the following steps:

Step (1): Login to your Magento Admin Panel.

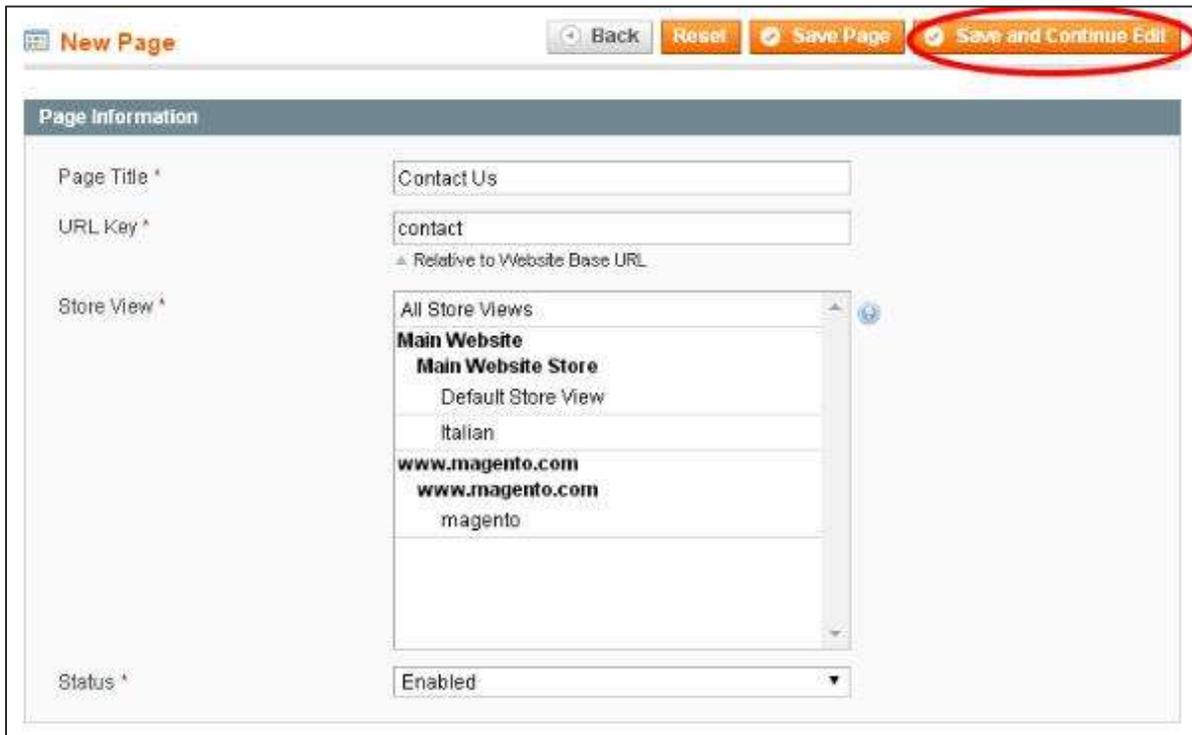
Step (2): Go to **CMS** menu and click on the **Pages** option.



Step (3): It will list some of the existing pages as shown in the following screen. If you want to add new page, click on the **Add New Page** button.

A screenshot of the 'Manage Pages' screen in the Magento Admin Panel. The page title is 'Manage Pages' and there is an 'Add New Page' button circled in red. The page shows a table of existing pages with columns: Title, URL Key, Layout, Store View, Status, Date Created, Last Modified, and Action. The table contains 6 records. Below the table, there are pagination controls showing 'Page 1 of 1 pages | View 20 per page | Total 6 records found' and buttons for 'Reset Filter' and 'Search'.

Step (4): Next, specify the title for the page using **Page Title** field, enter the page URL identifier using **URL Key** option. Enable the page using **Status** dropdown menu and click on the **Save and Continue Edit** button.

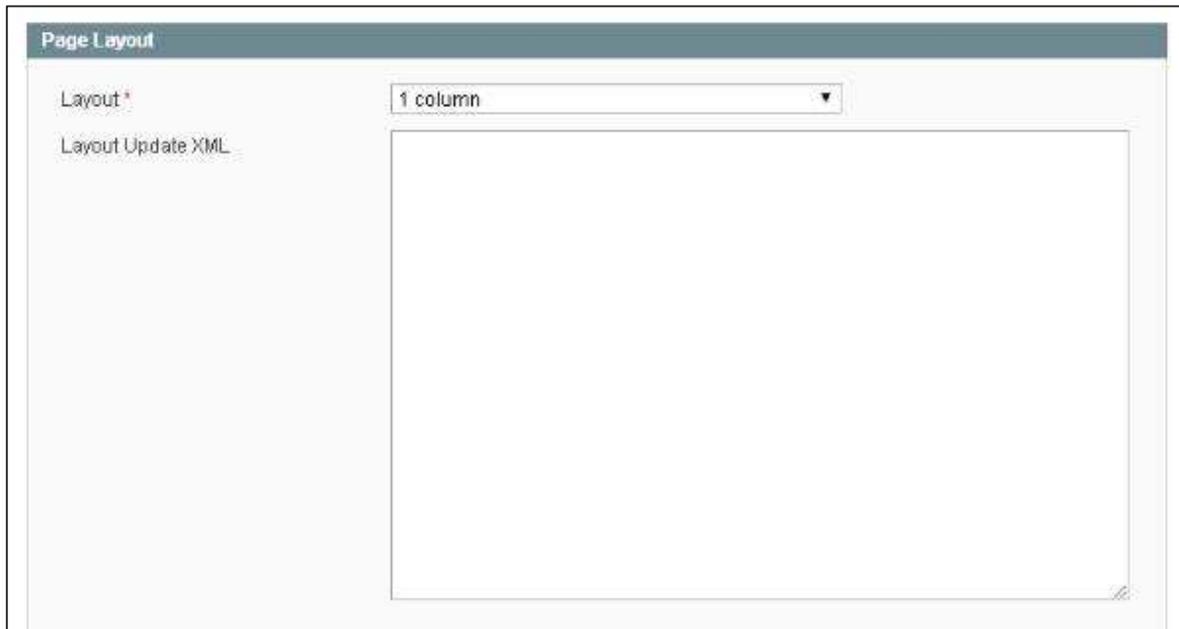


Step (5): When you save the page, it will go to **Content** section asking heading for the page using Content Heading field and page content. Click on **Save and Continue Edit** button to proceed to the next step.



Step (6): After done with the content section, you can design the page by using **Design** section which has two sections i.e. **Page Layout** and **Custom Design**.

The **Page Layout** section contains a *Layout* option which allows to select a layout as per your choice and *Layout Update XML* option inserts the XML code.



The **Custom Design** section contains fields such as:

- **Custom Design From** and **Custom Design To** are used to set start date and end date for the design change
- **Custom Theme** option allows to select theme for your page using dropdown menu
- **Custom Layout** option allows to select a layout as per your choice
- **Custom Layout Update XML** option inserts custom XML code

Custom Design

Custom Design From:

Custom Design To:

Custom Theme: -- Please Select --

Custom Layout: -- Please Select --

Custom Layout Update XML:

Step (7): The **Meta Data** section contains *Keywords* field which sets keyword for a page name and the *Description* field specifies the description the given page. Click the **Save Page** button to save your page.

Page Information

Page Information

Content

Design

Meta Data

Meta Data

Keywords: ContactUs

Description: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi tuctus. Duis lecturis. Nulla nec velit.

Buttons: Back, Reset, Delete Page, **Save Page**, Save and Continue Edit

Step (8): Now you can see the page created in the list.

Manage Pages [Add New Page](#)

Page of 1 pages | View per page | Total 8 records found [Reset Filter](#) [Search](#)

Title	URL Key	Layout	Store View	Status	Date Created	Last Modified	Action
			All Store Views		From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	
About Us	about-magento-demo-store	2 columns with right bar	All Store Views	Enabled	Apr 22, 2015 12:08:23 PM	Apr 22, 2015 12:08:23 PM	Preview
Contact Us	contact	1 column	Main Website Main Website Store Default Store View	Enabled	May 7, 2015 12:13:51 PM	May 10, 2015 3:53:37 PM	Preview
Customer Service	customer-service	3 columns	All Store Views	Enabled	Apr 22, 2015 12:08:24 PM	Apr 22, 2015 12:08:24 PM	Preview
Enable Cookies	enable-cookies	1 column	All Store Views	Enabled	Apr 22, 2015 12:08:25 PM	Apr 22, 2015 12:08:25 PM	Preview
Eva Home page	galseva_home	1 column	All Store Views	Enabled	May 11, 2015 5:10:11 PM	May 11, 2015 5:10:11 PM	Preview
Home	home	2 columns with right bar	Main Website Main Website Store Default Store View	Enabled	Apr 22, 2015 12:08:22 PM	May 11, 2015 4:35:51 PM	Preview
404 Not Found 1	no-routs	2 columns with right bar	All Store Views	Enabled	Apr 22, 2015 12:08:21 PM	Apr 22, 2015 12:08:21 PM	Preview
Privacy Policy	privacy-policy-cookie-restriction-mode	1 column	All Store Views	Enabled	Apr 22, 2015 12:08:20 PM	Apr 22, 2015 12:08:20 PM	Preview

35. Magento – Set Up CMS

Magento CMS (Content Management System) section is used to manage all website pages. It is a way of promoting the products by providing valuable information to the customers and increases search engine visibility. It can be used to create rich content for your web store.

The CMS section contains following topics:

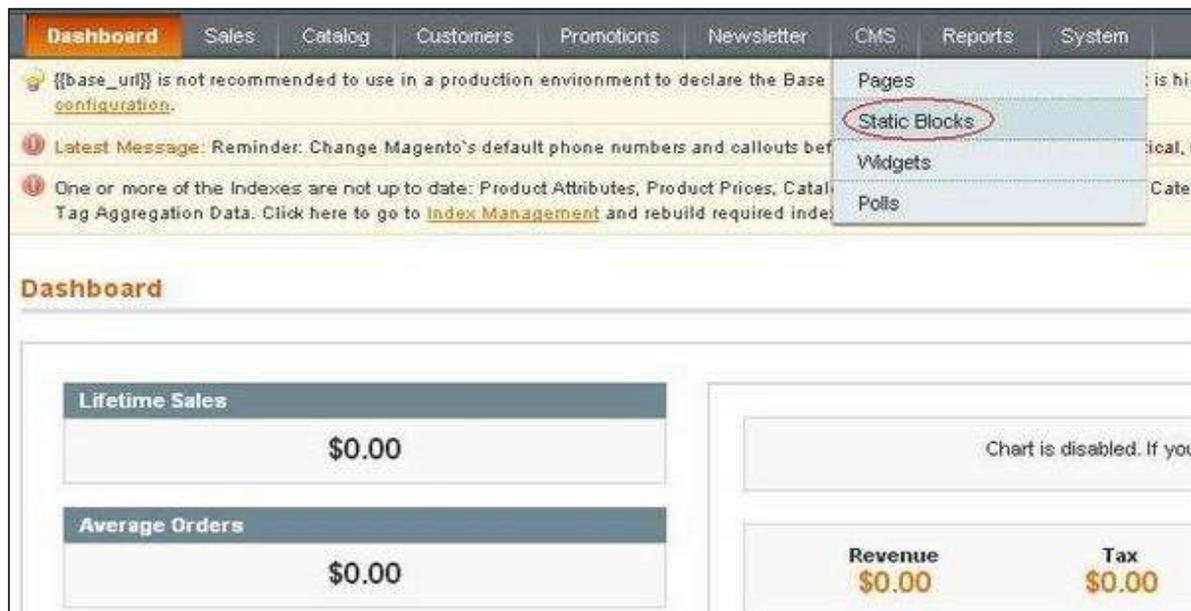
Pages

You can create or set up new pages in Magento. You can include text, images, blocks of content, etc. For more information on setting up new pages, you can refer this link [Setting up New Pages](#).

Static Blocks

Static block is a piece of content that can be used anywhere in the pages. Magento allows creating blocks of content that can be used through the store and can be added to any page or another block. To create static blocks, follow these steps:

Step (1): Go to **CMS** menu and click on the **Static Blocks** option.



The screenshot shows the Magento Admin Dashboard. At the top, there is a navigation menu with tabs for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System. The CMS tab is selected, and a dropdown menu is open, showing options for Pages, Static Blocks (circled in red), Widgets, and Polls. Below the navigation menu, there are several warning messages. The main dashboard area displays various widgets, including 'Lifetime Sales' and 'Average Orders', both showing \$0.00. There is also a 'Revenue' widget showing \$0.00 and a 'Tax' widget showing \$0.00. A chart area on the right is disabled.

Step (2): You can create a new block by clicking on the **Add New Block** button.

Identifier	Status	Date Created	Last Modified
footer_links	Enabled	Aug 5, 2015 11:10:30 PM	Aug 5, 2015 11:10:38 PM
footer_links_company	Enabled	Aug 5, 2015 11:10:36 PM	Aug 5, 2015 11:10:36 PM
cookie_restriction_notice_block	Enabled	Aug 5, 2015 11:10:39 PM	Aug 5, 2015 11:10:39 PM

Step (3): Next, it will open a window for creating new block as shown in the following screen.

The page contains the following fields:

- **Block Title:** It adds the title for the block.
- **Identifier:** It assigns identifier to block which uses lower case characters, underscores, etc.
- **Status:** Set this field as "Enabled" to make block visible.
- **Content:** It includes content of the block and uses editor to format text, creates links, tables, images, etc.

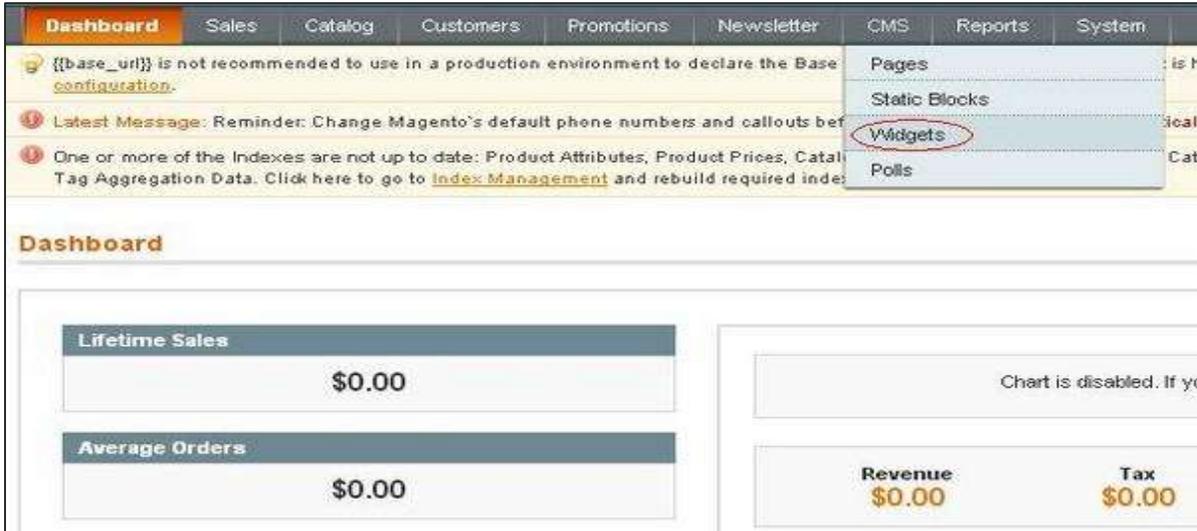
After filling all the fields, click the **Save Block** button.

Widgets

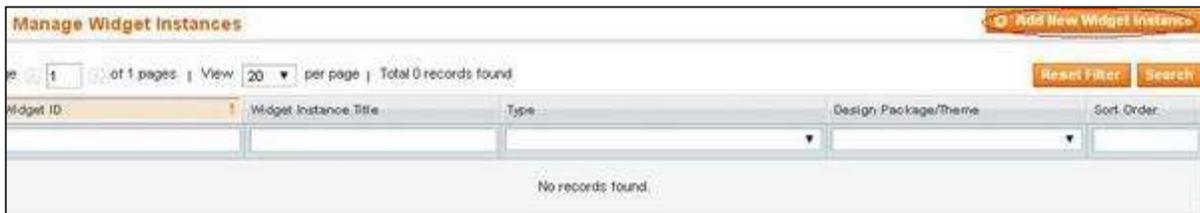
Widget allows displaying a wide range of content and placing it at block references in the store. They can be inserted into pages, blocks or they can have blocks inserted into the widget.

You can create the widget by using following steps:

Step (1): Go to **CMS** menu and click on the **Widgets** option.



Step (2): To create new widget, click the **Add New Widget Instance** button.



Step (3): Under the settings section, select the **Type** of the widget and **Design Package/Theme** and click the **Continue** button.



Step (4): Next, it displays the **Frontend Properties** and **Layout Updates** sections.



In the Frontend Properties section, fill the following details:

- **Widget Instance Title:** It specifies the title for the widget. It is only for internal use and won't be visible to the customers.
- **Sort Order:** It is used to specify the order of the block when listed with others.

In the **Layout Updates** section, click the **Add Layout Update** button and set the **Display On** field to type of category where you want the widget to appear. It can be set with the other options as shown in the following screen.



In the **Block Reference** list, select the section of your page layout where you want the widget to appear and set the template with **Link Block Template** or **Inline Template**.

Step (5): Click **Save and Continue Edit** button to save your changes and continue editing. Next, it will open **Widget Options** panel with the following options.



- **Anchor Custom Text:** It adds custom text for the widget.
- **Anchor Custom Title:** It adds custom title for the widget.
- **CMS Page:** It allows selecting the CMS page with the widget.

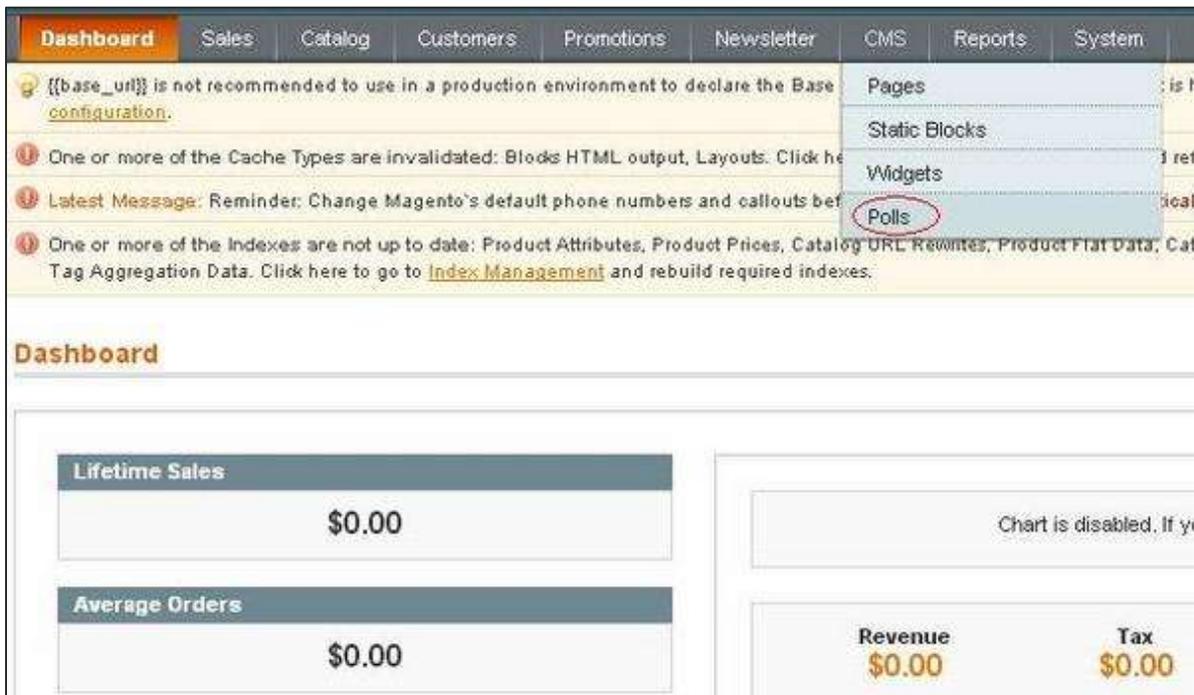
After done with the settings, click on the **Save** button.

Polls

Polls are used to get customer's opinions and preferences. The poll results appear immediately after response is submitted.

You can create the poll by using the following steps:

Step (1): Go to **CMS** menu and click on the **Polls** option.



Step (2): Next, it will open a Poll Manager window where you can add new poll as shown in the following image.



Step (3): In the Poll Information section, enter the **Poll Question** and you can set the **Status** to "Open" or "Closed".

The screenshot shows the 'New Poll' form in the 'Poll information' section. It includes a 'Poll Question' text input field and a 'Status' dropdown menu currently set to 'Open'. At the top right, there are three buttons: 'Back', 'Reset', and 'Save Poll'.

Step (4): In the Poll Answers section, do the following:

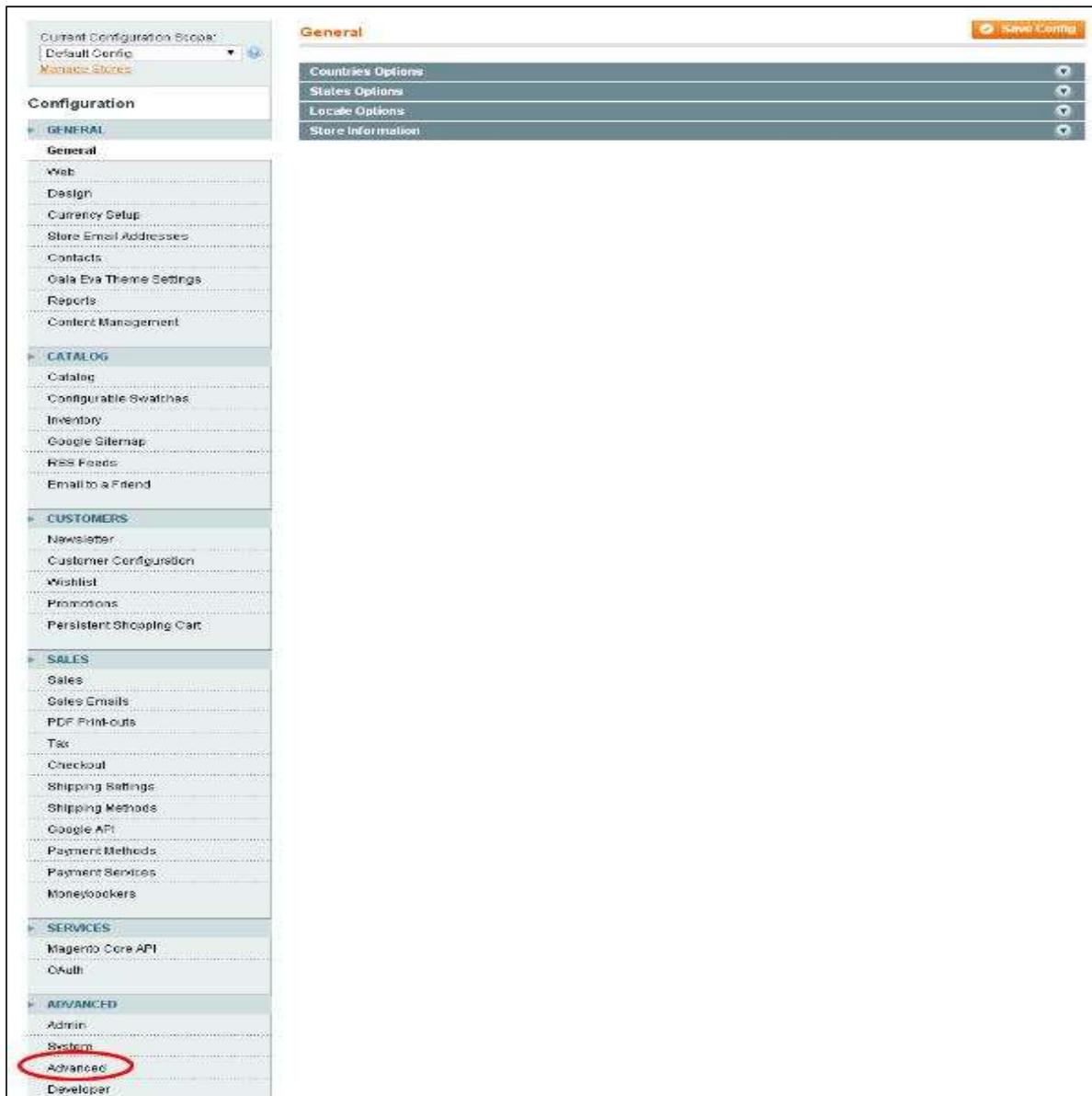
The screenshot shows the 'New Poll' form in the 'Assigned Answers' section. It includes an 'Answer Title' text input field and a 'Votes Count' text input field containing the number '0'. Below the 'Votes Count' field, there is a 'Delete' button with the following HTML code: `<button id="id_323285768330ac3d32a8711725724dcf" title="Delete" type="button" class="scalable delete" onclick="answer.del(this)" style="">Delete</button>`

In the **Answer Title** field, enter the answer as you want it to appear in the poll for which you had entered the poll question and to weight an answer, enter a number in the **Votes Count** field. When complete, click the **Save Poll** button.

36. Magento – Set Up Newsletter

Creating newsletter is a part of communication process with the buyers. Customers can subscribe to newsletters using Magento. Customers can sign up for the newsletter while creating a new customer account which contains checkbox for sign up. For creating newsletters, you need to enable newsletter option in your Magento to make sure that customers have confirmed to receive newsletter.

Step (1): To enable newsletter, go to **System -> Configuration** and click on Advanced option under **Advanced** section on the left side navigation bar.



Step (2): Expand the **Disable Modules Output** panel, look for **Magento_Newsletter** option and **Enable** it.

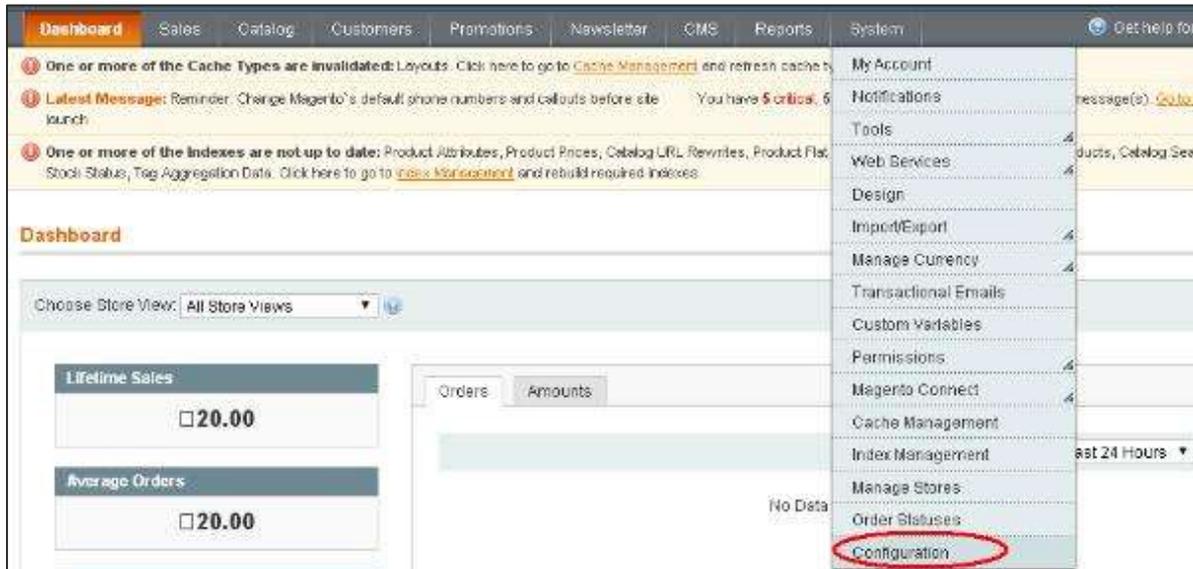
The screenshot shows the Magento Admin configuration interface. On the left is a navigation menu with categories like Configuration, CATALOG, CUSTOMERS, SALES, and SERVICES. The 'Advanced' section is selected. The main content area is titled 'Advanced' and contains a sub-section 'Disable Modules Output'. This section is a table with two columns: the module name and its status. The 'Magento_Newsletter' row is highlighted with a red box, and its status is 'Enable'. A 'Save Config' button is circled in red in the top right corner.

Module Name	Status
Curl_RedisSession	Enable
EM_EvaSettings	Enable
EM_RidashowWidget	Enable
Magento_Admin	Enable
Magento_AdminNotification	Enable
Magento_Api	Enable
Magento_Api2	Enable
Magento_Authorizenet	Enable
Magento_Backup	Enable
Magento_Dundle	Enable
Magento_Captcha	Enable
Magento_Catalog	Enable
Magento_CatalogIndex	Enable
Magento_CatalogInventory	Enable
Magento_CatalogRule	Enable
Magento_CatalogSearch	Enable
Magento_Central	Enable
Magento_Checkout	Enable
Magento_Cms	Enable
Magento_Computer	Enable
Magento_ConfigurableSwatches	Enable
Magento_Connect	Enable
Magento_Contacts	Enable
Magento_Core	Enable
Magento_Cron	Enable
Magento_CurrencySymbol	Enable
Magento_Customer	Enable
Magento_Dataflow	Enable
Magento_Directory	Enable
Magento_Downloadable	Enable
Magento_Fax	Enable
Magento_GiftMessage	Enable
Magento_GoogleAnalytics	Enable
Magento_HongleCheckout	Enable
Magento_ImportExport	Enable
Magento_Index	Enable
Magento_Install	Enable
Magento_Log	Enable
Magento_Media	Enable
Magento_Newsletter	Enable
Magento_OAuth	Enable

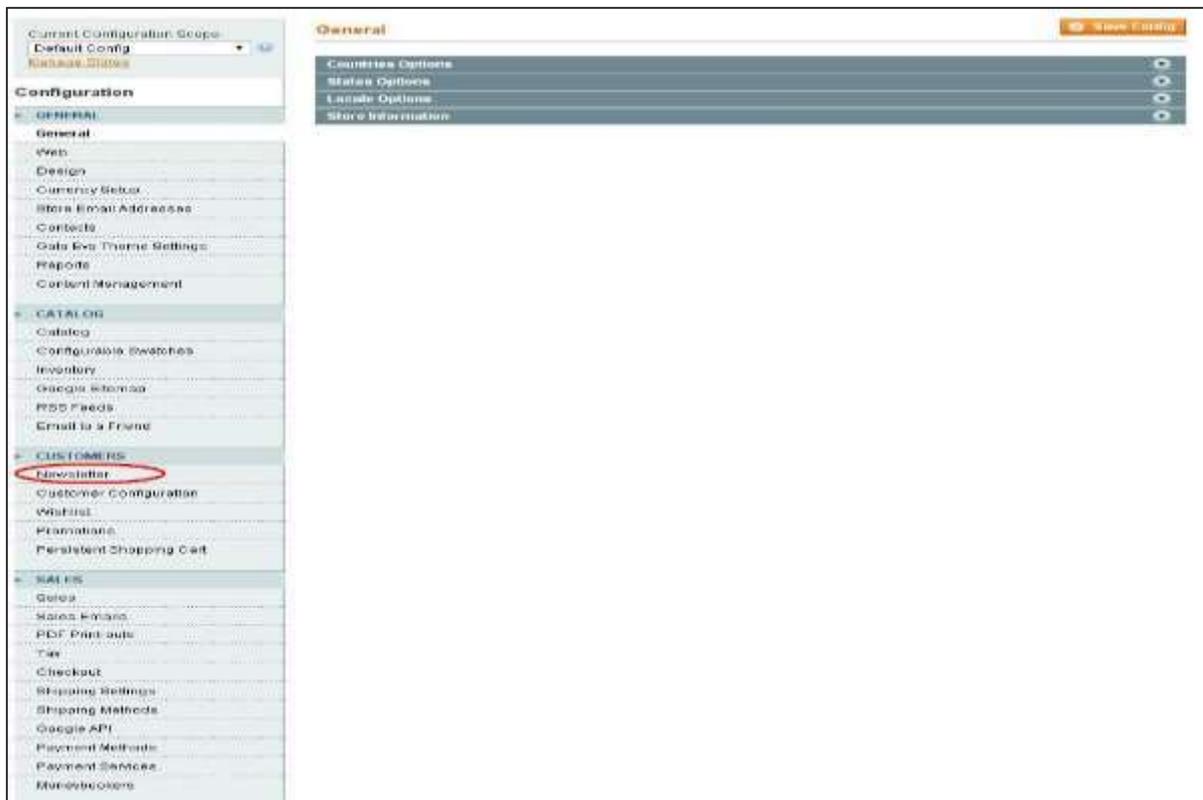
You can configure the newsletter settings as described in the following steps:

Step (1): Login to your Magento Admin Panel.

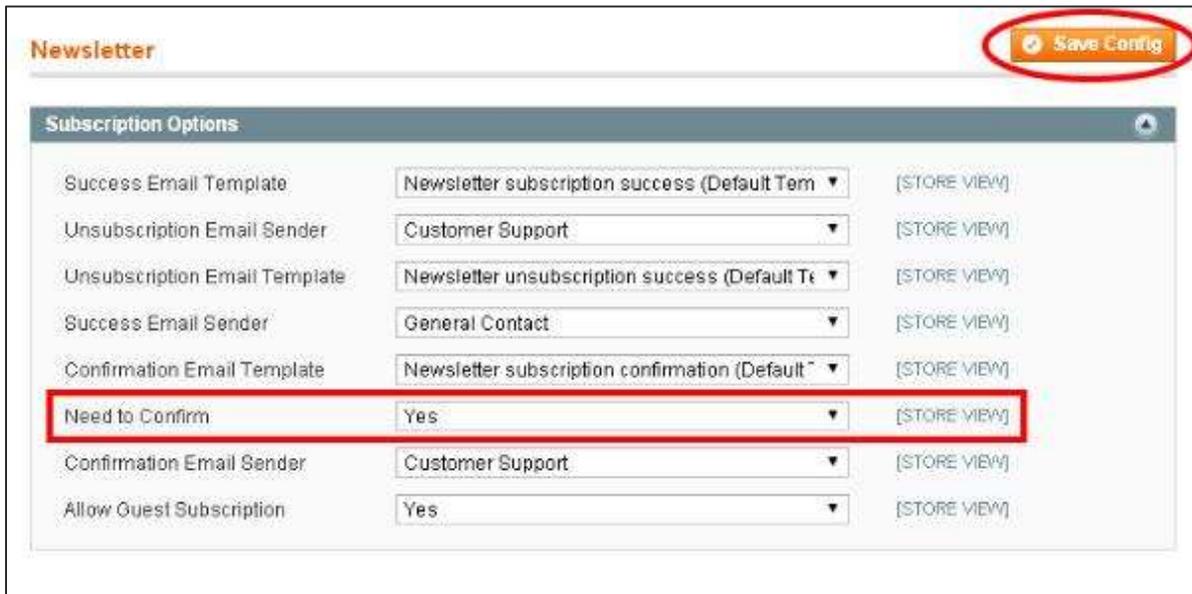
Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): On the left side navigation bar, go to **Customer** section and click on the **Newsletter** option.



Step (4): Then, expand the **Subscription Options** panel, select the **Yes** option for **Need to Confirm** field. Yes option specifies that customers want to subscribe to newsletter. Click on the **Save Config** button to save your changes.

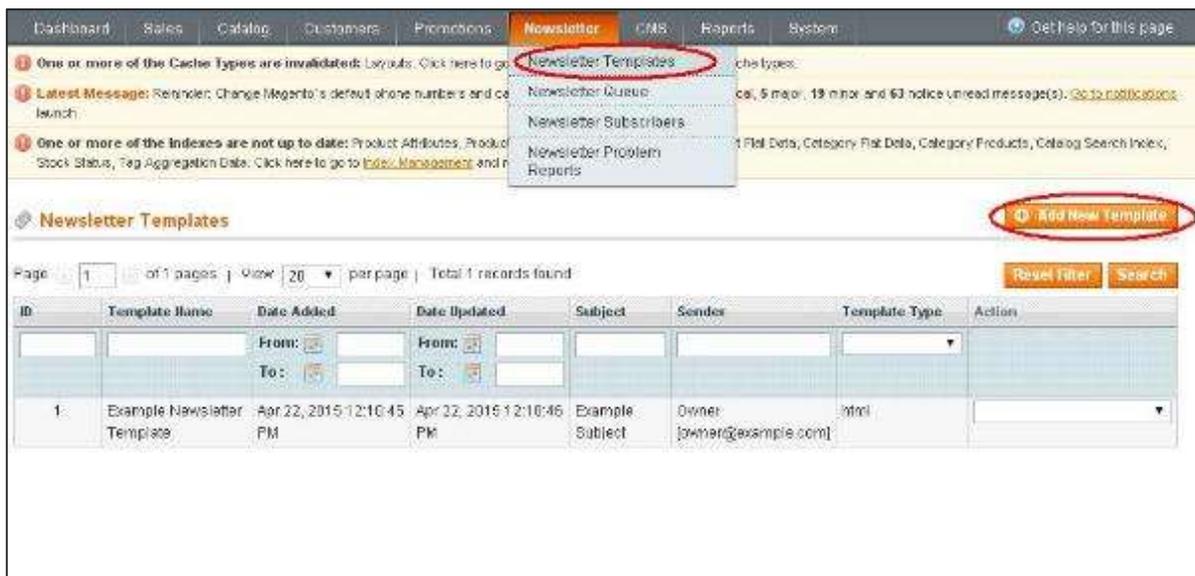


Creating Newsletter Template

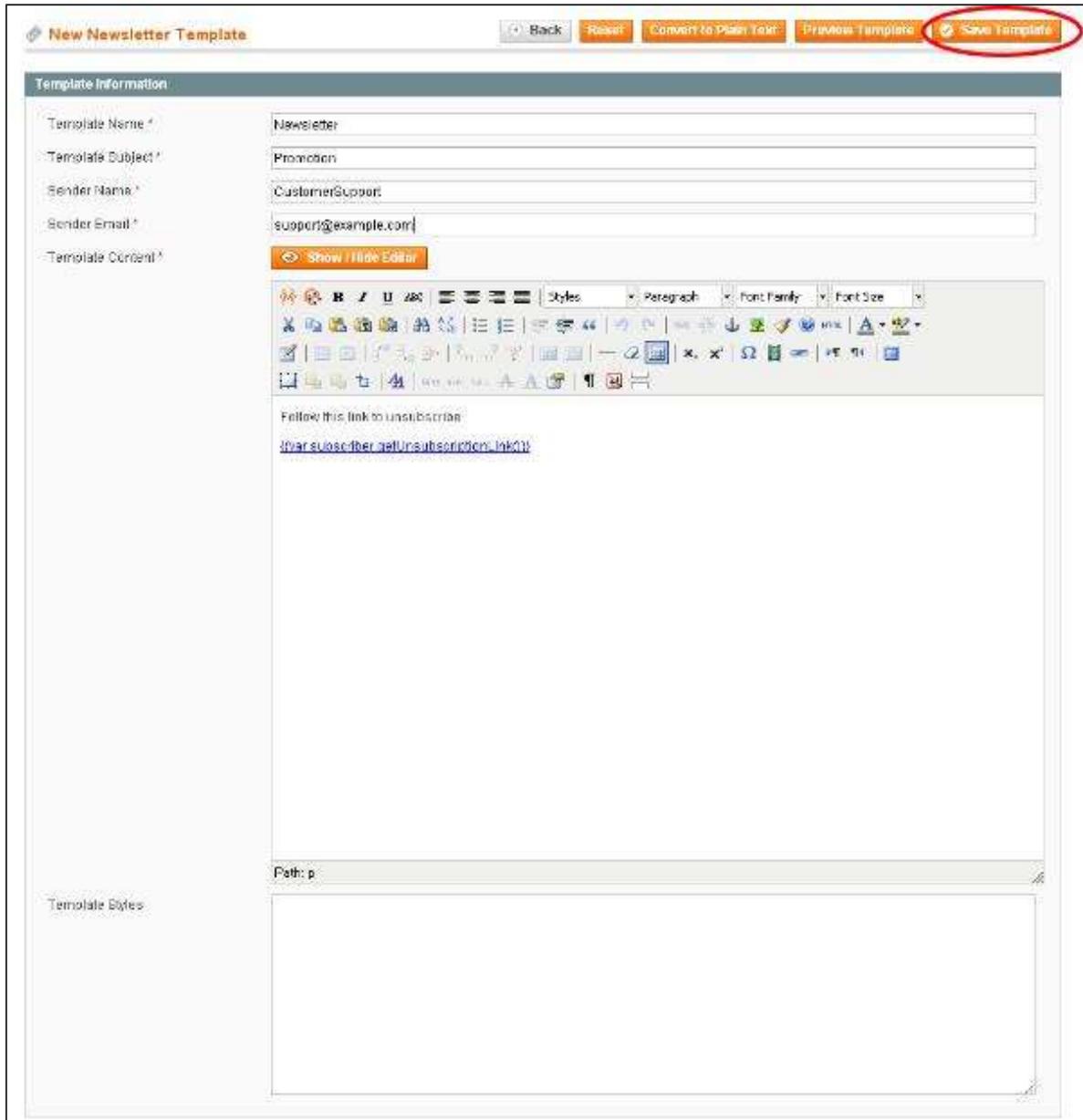
Before sending a Newsletter, you need to create a newsletter template. To create a newsletter template, follow these steps:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **Newsletter -> Newsletter Templates** and click on the **Add New Template** button.



Step (3): It will display some settings related to newsletter template. Fill up all the necessary fields and click on the **Save Template** button as shown in the following screen.

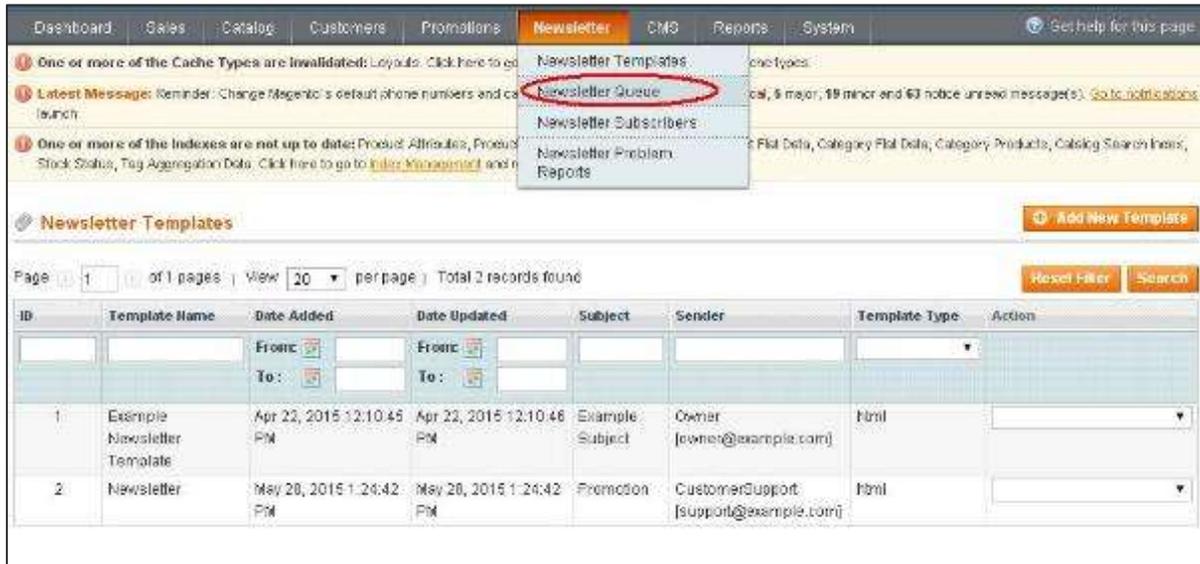


- **Template Name:** It is the name for your template.
- **Template Subject:** It specifies the subject of the e-mail which would be received by the customer.
- **Sender Name and Sender Email:** These fields specify the name and e-mail of the sender which is to be sent to customers.
- **Template Content:** It provides text editor and allows entering HTML code of the body of the e-mail.

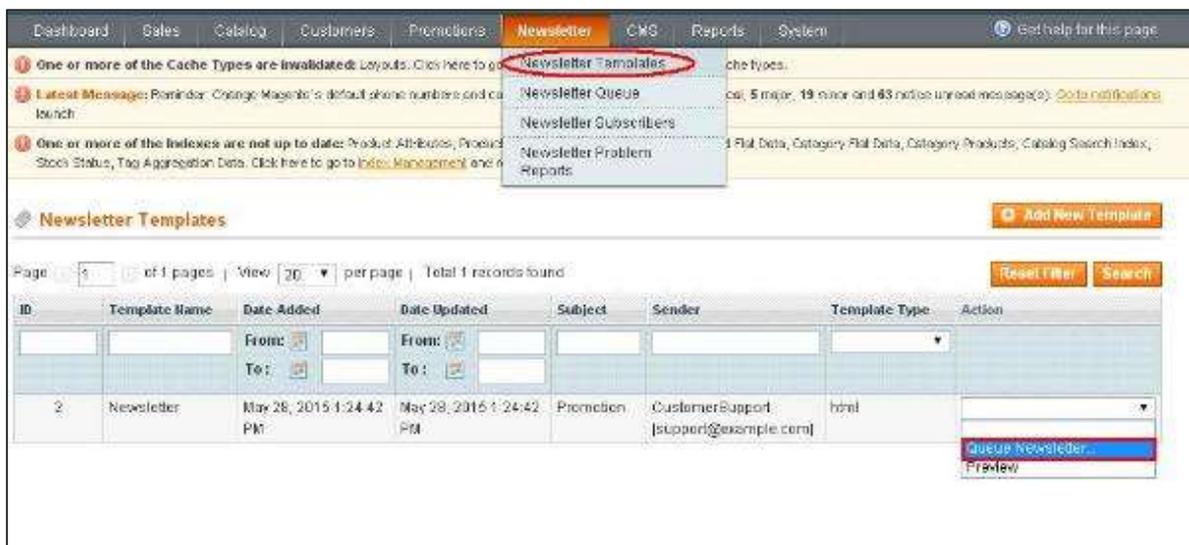
Send Newsletter

You can send the newsletters to your subscribers by queuing the template as shown in the following steps.

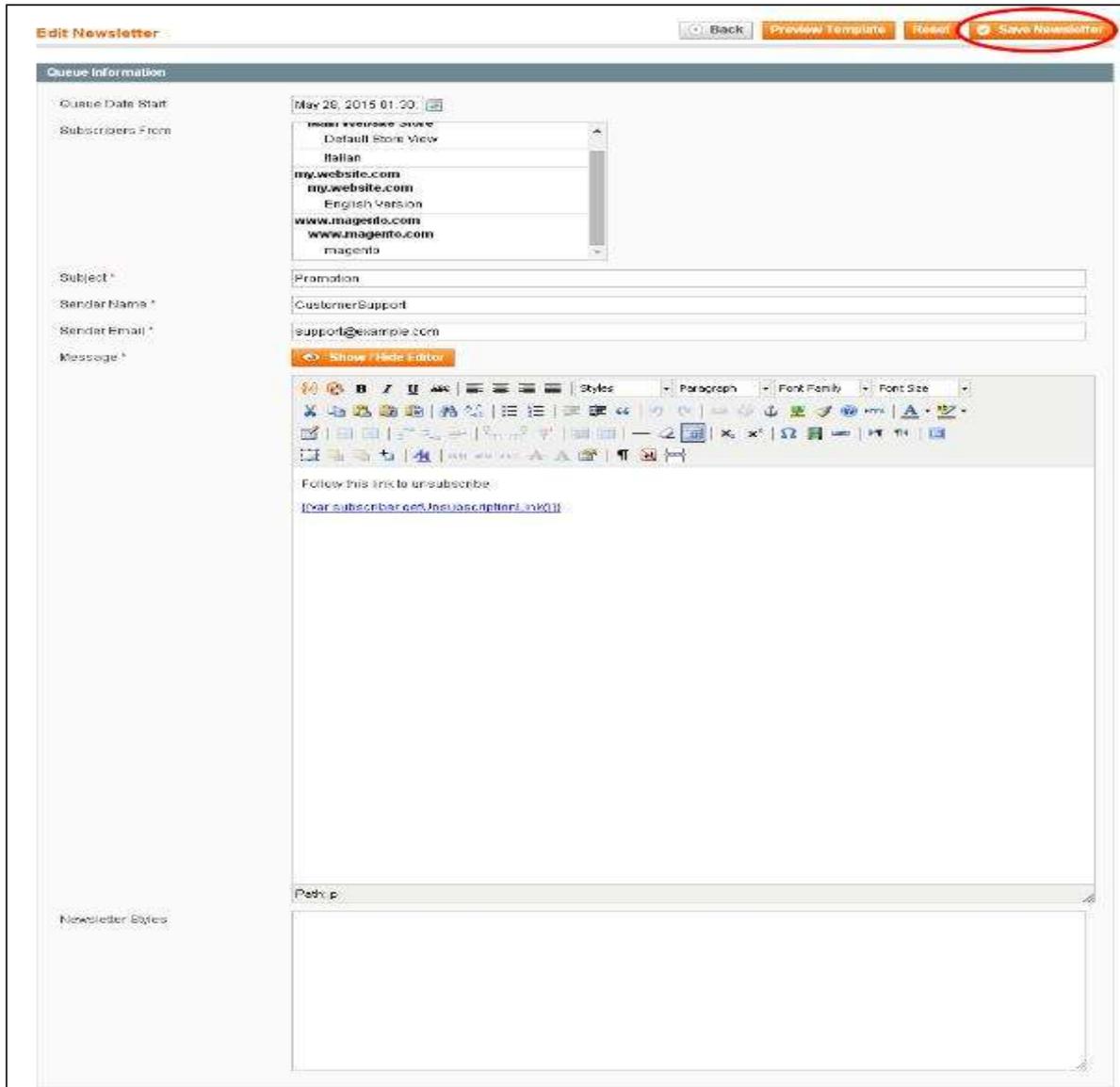
Step (1): Go to **Newsletter** menu and click on the **Newsletter Queue** option which displays the newsletter templates.



Step (2): For sending the newsletter to subscribers, go to **Newsletter -> Newsletter Templates** and select the **Queue Newsletter** option from the dropdown menu on the bottom right side of Newsletter Template page.



Step (3): The page that pops up provides some of the options as shown in the following screen.



- **Queue Date Start:** It selects the date when you are going to start sending the newsletter.
- **Subscribers From:** It shows both former and current subscribers list.
- **Subject:** It specifies the subject of the e-mail.
- **Sender Name and Sender Email:** These fields specify the name and e-mail of the sender which is to be sent to customers.
- **Message:** It provides text editor and allows entering message of the e-mail.

Fill up all the fields and click on **Save Newsletter** button on the top right corner to send newsletter to subscribers.

Part 5: Optimization

37. Magento – Site Optimization

Magento is a content management system that is commonly known to be performance intensive. Optimizing the speed of your Magento allows customers to have the best user experience while shopping in your E-commerce store.

Environment Optimization

Based on the additional configurations of the server environment, the hosting site providers speed up your store.

Following are the tips to optimize Magento environment.

- It uses complex database, so that it needs to be run on dedicated servers.
- Magento application can be optimized by using cloud computing.
- Merge your JavaScript and CSS files, which reduces the load time dramatically since it is loading only one merged file.
- Proper MySQL configuration is one of the most important aspects in terms of performance.
- Always upgrade to the latest Magento version as it offers better performance.
- Use a web application accelerator which can speed up your Magento store by 80%.

Configuration Optimization

Magento has built-in tools that helps to optimize its performance. These must be properly configured and matched with your site's unique requirements. Following are the tips to optimize Magento configuration.

- To speed up Magento performance, don't run MySQL and web server on the same machine.
- Do not host files on your web server that you do not use.
- Optimize of session storage.
- Enable Magento flat catalog. (Magento uses a complex and resource-intensive Entity Attribute Value [or EAV] based catalog). After initial catalog establishment, enabling the flat catalog can dramatically improve database query time.
- Identify and disable unused Magento modules.

Code Optimization

Code influences the speed of your site. The testing tools help to gain insight into the specific process.

Few tips for Code Optimization are:

- Remove unused or unnecessary code processes.
- Optimize Magento performance, by compressing and aggregating JavaScript and CSS files.
- Compress all site images to optimal web image sizes.
- Identify bottlenecks (processes that causes the entire process to slow down or stop) both in front-end and back-end.

Frontend Optimization

These modules are used to improve the performance of Magento shopping experience and you can also reuse the modules. This speeds up the performance of the Magento front-end.

The following points illustrate how to optimize Magento front-end performance:

- Use the latest version of PHP, so that you can perform front-end operation much better and faster. The newest released version may cause errors, so carefully read the release notes and check out the new version.
- Use clean database to improve the performance of Magento. The database logs needs to be cleared regularly. The database stores the automatically created logs to keep track of record session and interaction.
- Magento caching should be enabled. This helps to load your website faster and reduces the direct requests to the server for files.
- Turn off unused modules so it reduces the amount of resources added to each page. This can be one of the Magento admin panel. The XML files are used to speed up the front-end performance of Magento.

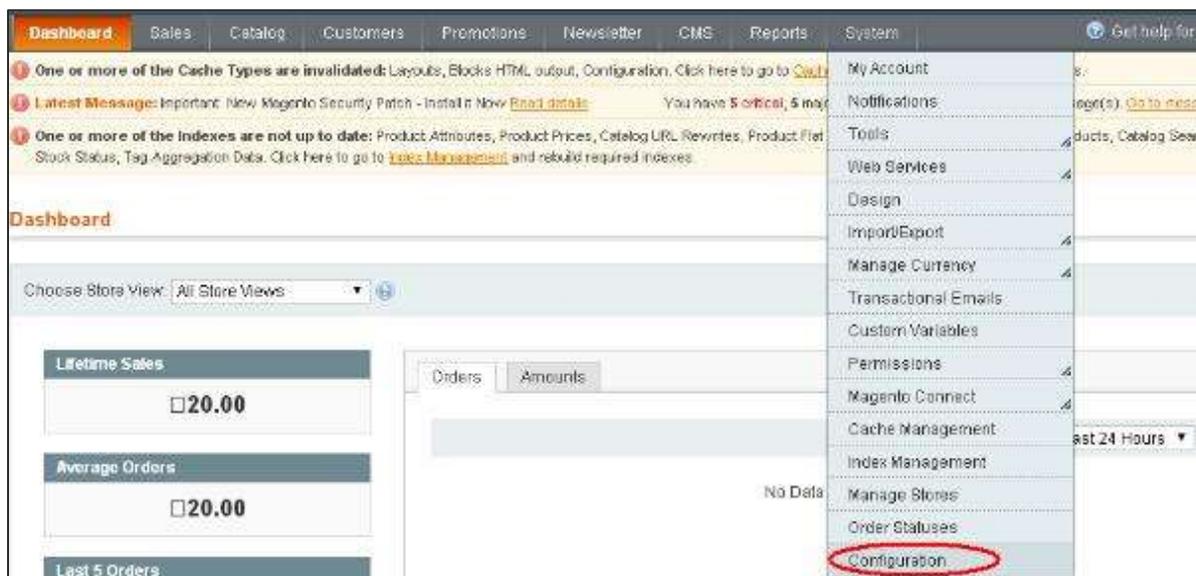
38. Magento – Profiling

The feature called **Profiler** which plays an important role in Magento development and can be used for debugging. It specifies blocks of code which makes loading of the page slow. Magento profiler reports the time taken by block of code to execute, number of times the block of the code was executed and memory used by it while rendering a Magento web page.

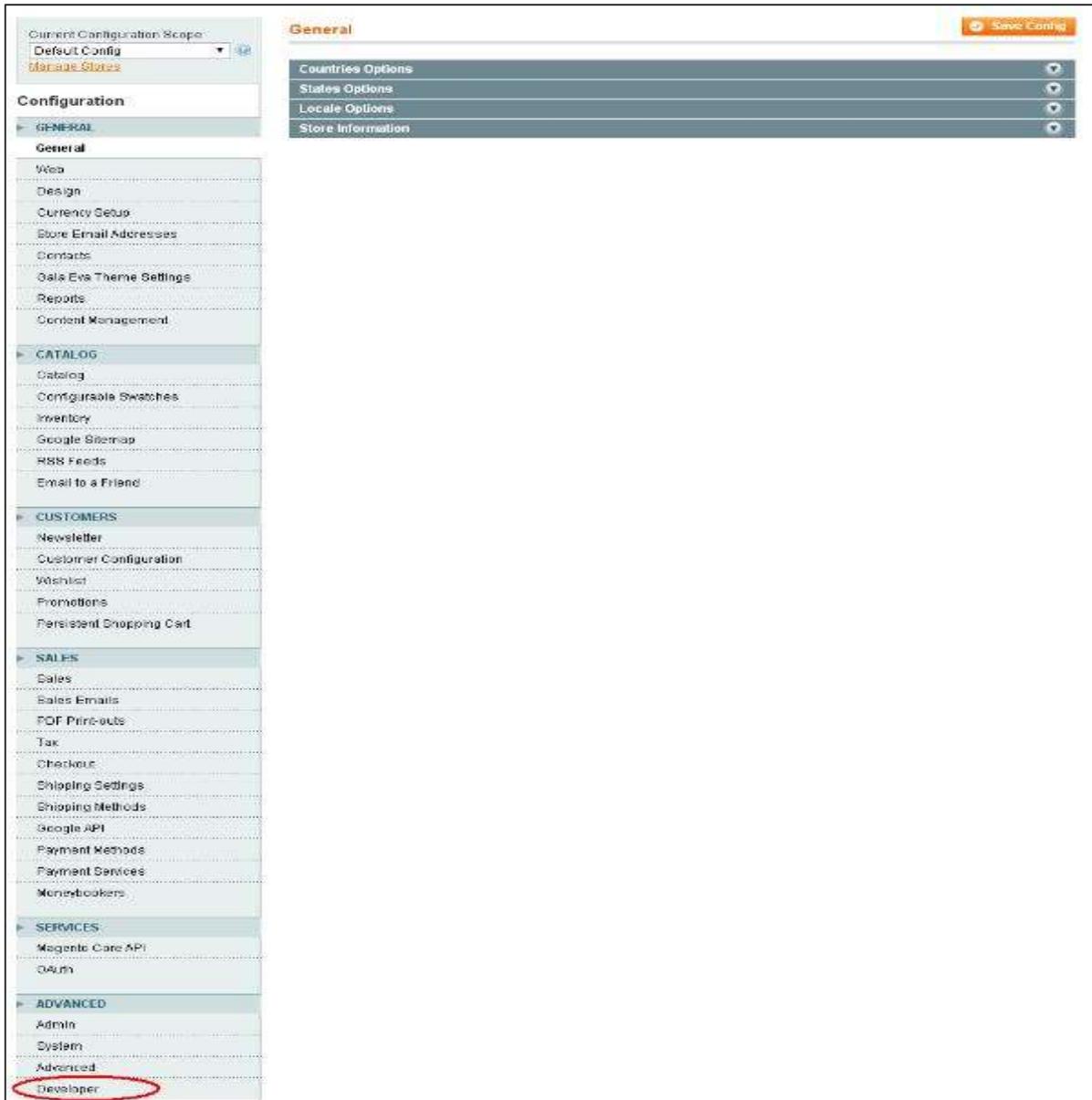
To enable the **Profiler**, follow these steps:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): On the left side of the navigation bar, go to **Advanced** section and click on the **Developer** option.



Step (4): Expand the **Debug** panel and enable the profiler by setting it to Yes and click on the **Save Config** button.



Step (5): At this point the profiler is enabled, but you need to tell the profiler to what profile. So go to root index.php file of your Magento installation and look for the line **#Varien_Profiler::enable();** and uncomment it, i.e. remove the hash sign.

Step (6): Now go to any of your pages, you should see the output in the footer area of the page like shown in the following screen.

Profiler				
Code Profiler	Time	Cnt	Emalloc	RealMem
mage	4.6914	1	0	0
mage::app::init::system_config	0.0178	1	136,496	262,144
CORE::create_object_of::Mage_Core_Model_Cache	0.0474	1	603,608	524,288
config/load-modules	0.5410	1	6,112	262,144
config/load-modules-declaration	0.0733	1	54,704	262,144
mage::app::init::apply_db_schema_updates	0.2371	1	3,480,504	3,670,016
DISPATCH EVENT::resource_get_tablename	0.0046	130	70,984	0
config/load-db	0.3288	1	340,792	0
mage::app::init::stores	0.1013	1	1,477,696	1,572,864
CORE::create_object_of::Mage_Core_Model_Mysql4_Store_Collection	0.0014	1	6,328	0
mage::app::init::front_controller	0.0444	1	320,720	262,144
mage::app::init::front_controller::collect_routers	0.0166	1	208,592	262,144
DISPATCH EVENT::controller_front_init_routers	0.0210	1	98,576	0
OBSERVER::cms	0.0050	1	29,832	0
mage::dispatch::db_url_rewrite	0.0343	1	357,416	524,288
DISPATCH EVENT::model_load_before	0.0008	15	8,256	0
DISPATCH EVENT::model_load_after	0.0007	17	9,352	0

39. Magento – Database Performance

One of the most time consuming process of the Magento store is its interaction with the database. Optimizing Magento Database is an important task to maintain the Magento site. Magento saves a lot of database because of tracking. The E-commerce system must have a tracking module which shows information when something goes wrong with their order.

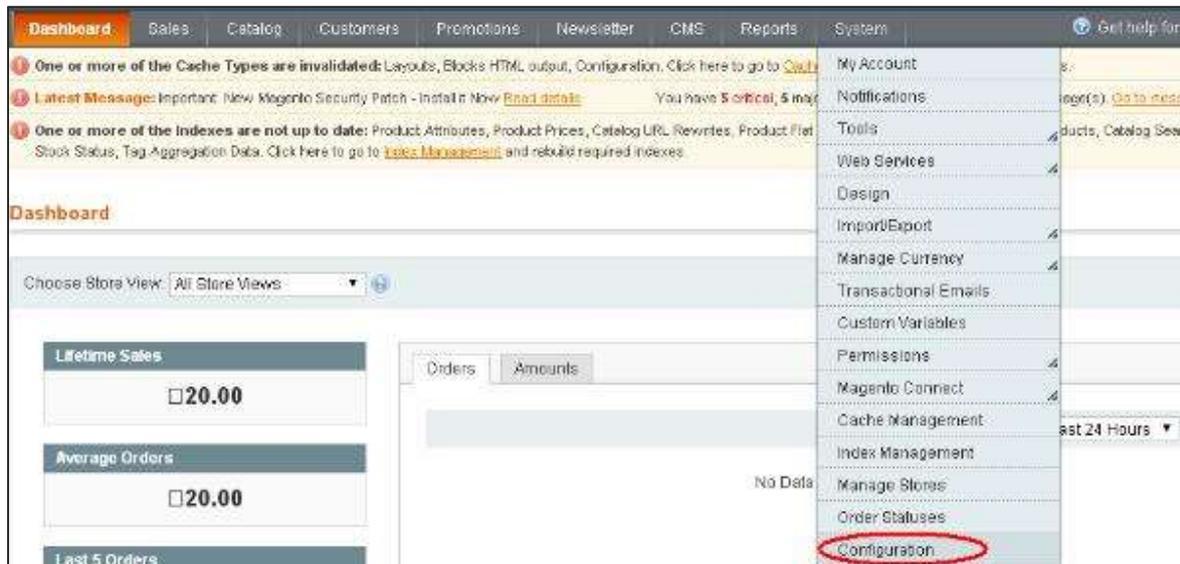
Following are some tips to improve the performance of database:

- Unused data must be cleaned up regularly for better performance.
- Optimize database queries.
- Configure setting and limits of the database server (e.g. memory setting, query cache, sort buffer optimization).

You can optimize Magento database log cleaning as shown in the following steps:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to **System** menu and click on the **Configuration** option.



Step (3): On the left side of the navigation bar, go to **Advanced** section and click on the **System** option.

Step (4): Expand the **Log Cleaning** panel, change "Enable Log Cleaning" to Yes option and click the **Save Config** button.

The screenshot shows the 'System' configuration page in Magento. The 'Log Cleaning' section is expanded, showing the following settings:

Setting	Value	Scope
Save Log, Days	180	[GLOBAL]
Enable Log Cleaning	Yes	[GLOBAL]
Start Time	00 : 00 : 00	[GLOBAL]
Frequency	Daily	[GLOBAL]
Error Email Recipient		[GLOBAL]
Error Email Sender	General Contact	[GLOBAL]
Error Email Template	Log cleanup Warnings (Default Template from	[GLOBAL]

Other sections visible in the configuration include: Cron (Scheduled Tasks) - all the times are in minutes, Mail Sending Settings, Currency, Notifications, External Full Page Cache Settings, Scheduled Backup Settings, and Storage Configuration for Media. A 'Save Config' button is located in the top right corner.

40. Magento – Search Engine Optimization

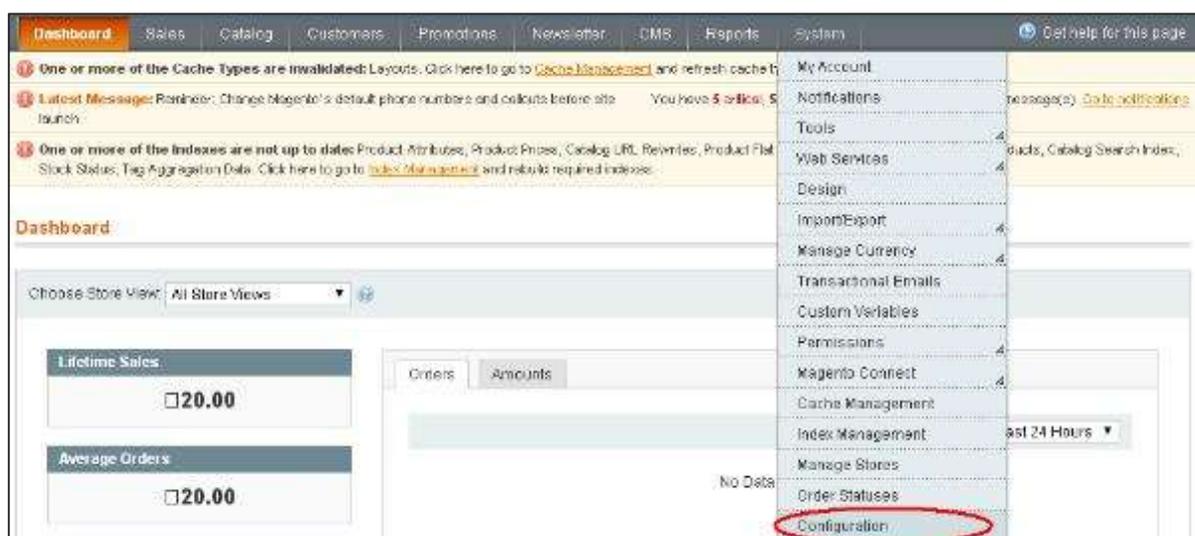
Magento is one of the search engine friendly systems. It is an essential component of a running web-based business and important form of marketing online. To make e-store more visible to the potential buyers, the website admin needs to enhance e-store ranking in search engine results. Customers will like your site if your site is clean, clear and easy to navigate.

Magento allows managing URLs, creating images and handling links that makes easy use of SEO, so that your site can easily be indexed in search engines. After installing Magento and setting up your store, you can start optimizing your site for search engines from the web configuration menu.

The following steps describe how to set up Search Engine Optimization (SEO) in Magento:

Step (1): Login to your Magento Admin Panel.

Step (2): Go to the **System** menu and click on **Configuration** option.



Step (3): On the left side of the navigation, go to the **General** section and click on the **Web** option.



Step (4): Expand the **URL Options** panel, set the **Add Store Code to URLs** option to **No** so that store codes are not added to URLs.

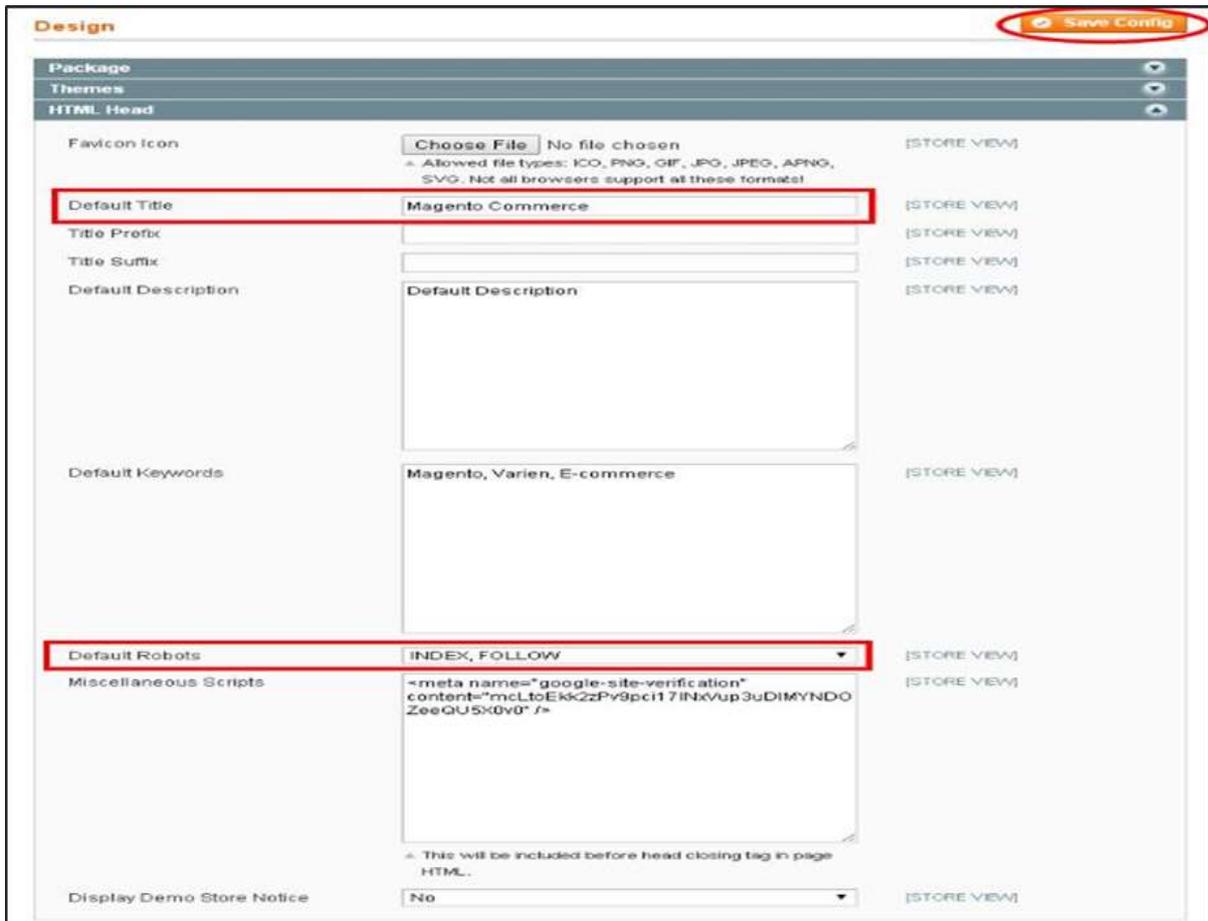
Step (5): In the **Search Engine Optimization** panel, set the **Use Web Server Rewrites** option to **Yes** to generate more search engine friendly and readable URLs. Click on **Save Config** button to save your changes.



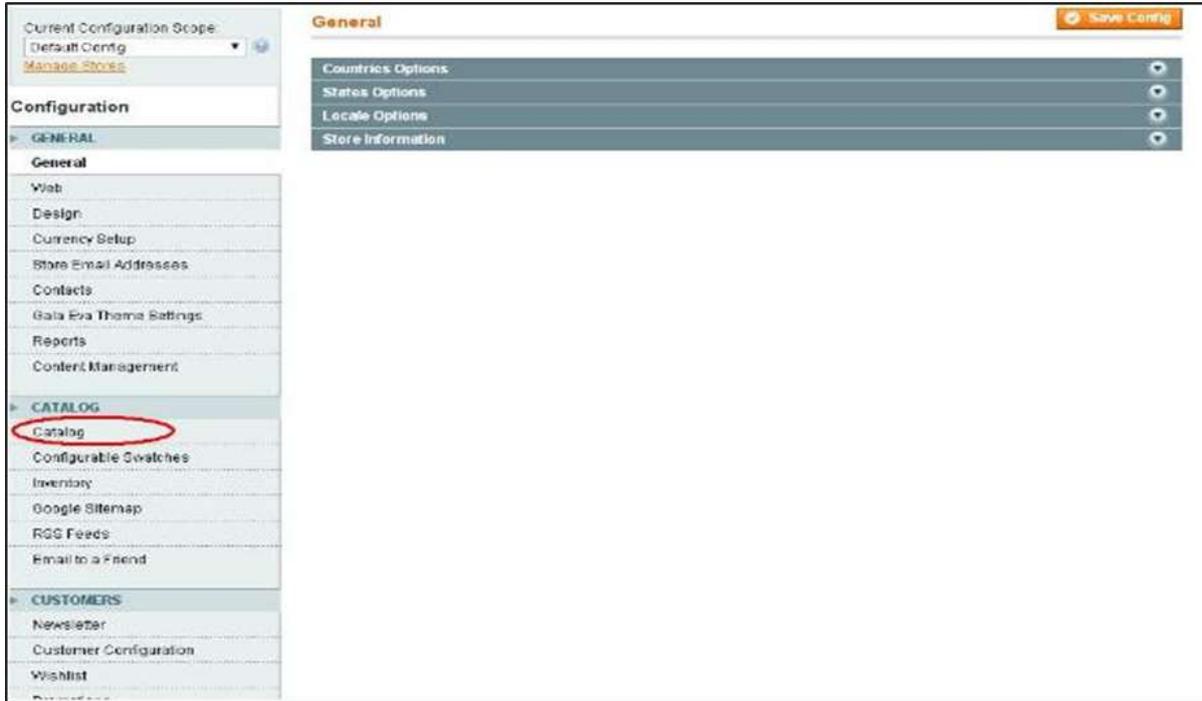
Step (6): To set the default page title, change setting of default robots, go to **System - > Configuration** and under **General** section and click on the **Design** option.



Step (7): Expand the **HTML Head** panel, write the title and description in the *Default Title* and *Default Description* for your pages, change the *Default Robots* field to **INDEX, FOLLOW** option so that search engines can index your website and show it in search results. When you are done, click **Save Config** button.



Step (8): To avoid duplications in URLs, go to the **System -> Configuration** and under **Catalog** section, click on the **Catalog** option.



Step (9): Expand the **Search Engine Optimizations** option and set the *Use Categories Path for Product URLs* option to **No**. To prevent Magento from generating duplicate content when you want to show the same product in multiple categories, set both *Canonical Link Meta Tag* fields to **Yes**. After done with the settings, click the **Save Config** button.

