



UNIT IV

Magento & FTP

INTRODUCTION

- 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 email 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 zoomin 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

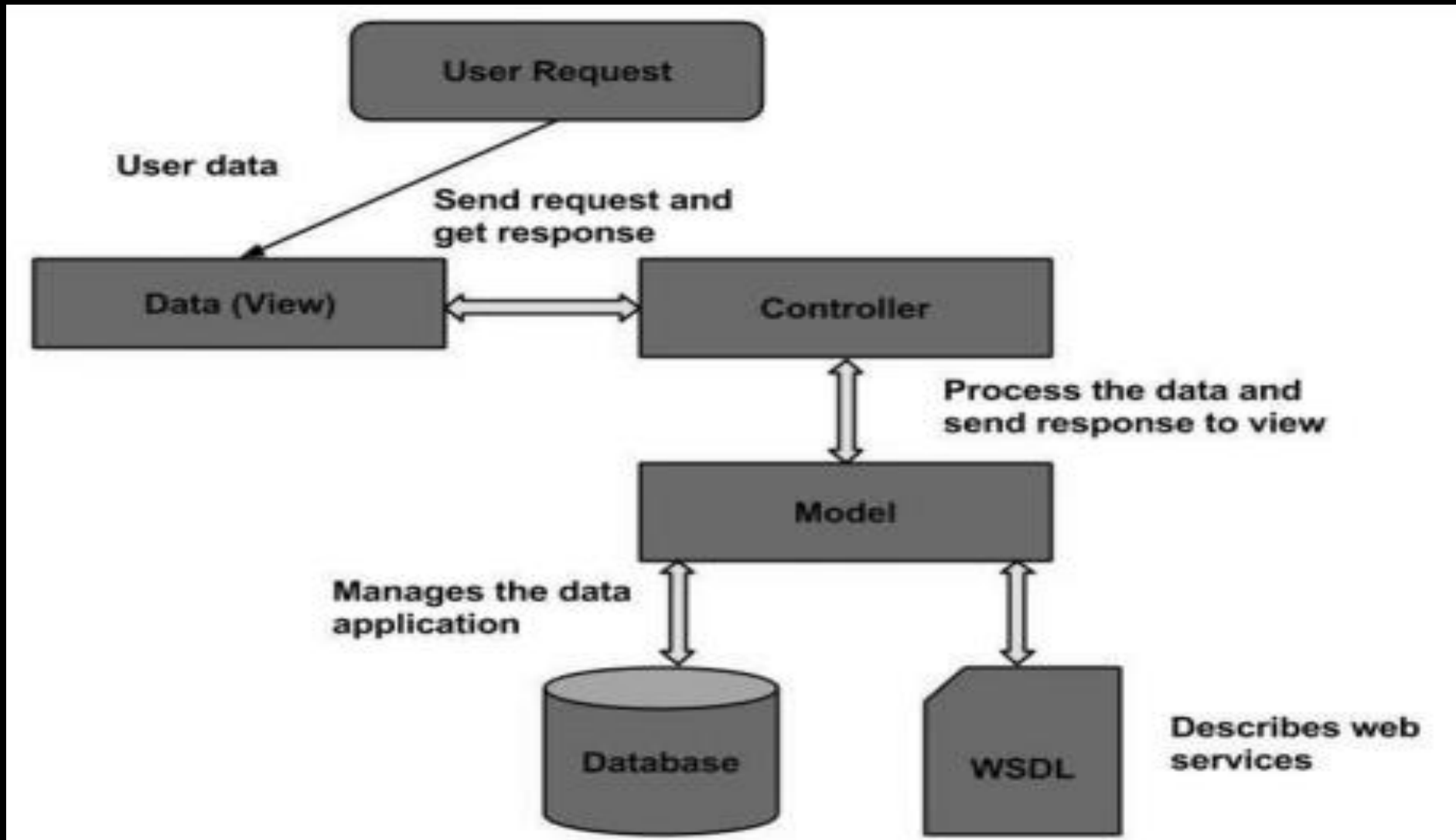
- Magento uses larger disk space and memory.
- Magento takes longer time to build the customized functionality.
- Magento is very slow compared to other E-commerce sites.
- Magento needs proper hosting environment. If the hosting environment is improper, the user can face many problems.

INSTALLING MAGENTO

- Lab Session

MAGENTO – ARCHITECTURE

- 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

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
 - 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.

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.
 - 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.

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


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.

MAGENTO PRODUCTS IMPORT

- After you learn the basics, the most efficient way to add a large number of products to the catalog is to import them from a CSV file.
- Data for all product types can be imported into the store. In addition, you can import products, advanced pricing data, customer data, customer address data, and product images. Import supports the following operations:
 - Add/Update
 - Replace
 - Delete
- The size of the import file is determined by the settings in the php.ini file on the server. The system message on the Import page indicates the current size limit. The default size is 2MB.
- Special characters—such as the equal sign, greater and less than symbols, single and double quotes, backslash, pipe, and ampersand symbols—can cause problems during data transfer. To ensure that such special characters are correctly interpreted, they can be marked as an “escape sequence.”
- For example, if the data includes a string of text such as `code="str"`, `code="str2"`, choosing to enclose the text in double quotes ensures that the original double quotes are understood to be part of the data. When the system encounters a double set of double quotes, it understands that the outer set of double quotes is enclosing the actual data.

- When importing product data, new product data is added to existing product data entries in the database. All fields except SKU can be updated through import. All existing product data is replaced with the imported new data. Exercise caution when replacing data. All existing product data will be completely cleared and all references in the system will be lost.
- Step 1: Prepare the Data
 - On the *Admin* sidebar, click **System**.
 - Under *Data Transfer*, choose **Import**.
 - Under *Import Settings*, set **Entity Type** to one of the following:
 - Advanced Pricing
 - Products
 - Customers and Addresses
 - Customers Main File
 - Customer Addresses
 - Click **Download Sample File**. Then on the download menu in the lower-left corner of your browser window, choose **Open**.
 - The sample file includes column headings with placeholder data for example product types.

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- Examine the structure of the sample file. As you prepare your CSV import file, make sure that the column headings are spelled correctly.
 - Verify that the size of your import file does not exceed the limit shown in the message.
 - If the import data includes paths to product images, make sure that the image files have been uploaded to the appropriate location. The default location on the Magento server is: `pub/media/import`.
 - If the images reside on an external server, make sure that you have the full URL to the directory that contains the images.

ADVANCE OR SPECIAL PRICING

- Magento supports a number of pricing options that you can use for promotions, or to meet the minimum advertised pricing requirements of the manufacturer. Changes to product pricing can be made on schedule, or by price rule that is applied at the product level or in the shopping cart.
- The Advanced Pricing settings define the conditions required for special pricing that is available for a specific customer group. Advanced Pricing can be applied to simple, virtual, downloadable, and bundle products.
- Advanced pricing data is synchronized with product pages.
 - **To display the Advanced Pricing options:**
 - 1. Open the product in edit mode.
 - 2. Under the **Price** field, click **Advanced Pricing**.
 - 3. Follow the instructions for the type of advanced pricing that is needed
 - [Group Price](#)
 - [Special Price](#)
 - [Tier Price](#)
 - [Minimum Advertised Price](#)

FIELD	DESCRIPTION				
Special Price	<p data-bbox="560 85 2522 128">Offers a discounted price during a specified time period.</p> <p data-bbox="560 157 2522 242">When a special price is available, the retail price is crossed out and the special price appears below in large, bold text.</p> <table border="0" data-bbox="560 285 2522 542"> <tr> <td data-bbox="560 285 942 385">From</td> <td data-bbox="968 285 2522 385">Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.</td> </tr> <tr> <td data-bbox="560 428 942 542">To</td> <td data-bbox="968 428 2522 542">Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.</td> </tr> </table>	From	Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.	To	Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.
From	Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.				
To	Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.				
Cost	The actual cost of the item.				
Customer Group Price	<p data-bbox="560 742 2522 828">Sets up promotional and tier prices for specific customer groups for the current website. Options include:</p> <table border="0" data-bbox="560 871 2522 1399"> <tr> <td data-bbox="560 871 942 971">Website</td> <td data-bbox="968 871 2522 971">Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.</td> </tr> <tr> <td data-bbox="560 1013 942 1399">Customer Group</td> <td data-bbox="968 1013 2522 1399"> <p data-bbox="968 1013 2522 1228">(Required) Identifies the customer group that qualifies to receive the discount price. When a value in a group or catalog field is changed, the corresponding custom price row that matched the previous setting is deleted from the shared catalog Options:</p> <p data-bbox="968 1270 1299 1313">ALL GROUPS</p> <p data-bbox="968 1356 1860 1399">Applies the rule to all customer groups.</p> </td> </tr> </table>	Website	Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.	Customer Group	<p data-bbox="968 1013 2522 1228">(Required) Identifies the customer group that qualifies to receive the discount price. When a value in a group or catalog field is changed, the corresponding custom price row that matched the previous setting is deleted from the shared catalog Options:</p> <p data-bbox="968 1270 1299 1313">ALL GROUPS</p> <p data-bbox="968 1356 1860 1399">Applies the rule to all customer groups.</p>
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Applies the rule guests and customers who are not logged in to their accounts.

Quantity

Specifies the quantity that is required to receive a tier price.

Price

(Required) Specifies a fixed or discount product price for members of the customer group, within the specific website.
Options: Fixed / Discount

Fixed

(Default) The discount price is entered as a fixed decimal value. For example, enter "9.99" as the discount price.

Discount

The discount price is entered as a percentage (%) of the base product price. For example, enter "10" for a 10% discount.



Deletes the current rule.

Add

Inserts an additional row for a new rule

Manufacturer's
Suggested Retail
Price

The manufacturer's suggested retail price (MSRP) for the product.

Display Actual Price	Determines where the actual price of the product is visible to the customer. Options:
Use Config	Uses the current configuration setting for the price display.
On Gesture	Displays the actual product price in a popup, in response to the "Click for price" or "What's this?" link.
In Cart	Displays the actual product price in the shopping cart.
Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is submitted.

MAGENTO 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 setup new pages in Magento. You can include text, images, blocks of content etc. For more information on 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.




- 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.

- Polls

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

- 
- In Magento 2, you can create new pages, blocks and widgets in **Content Management System** (CMS). With these **3 elements**, you can combine them to make static pages for products and services information.
 - **Add New Page**
 - The interface of Pages, Blocks and Widgets in Content are the same with the interface in Products or Customers. Click on **Add New Page** button.

MAGENTO ORDERS

- The Orders workspace lists all current orders in descending order from latest purchase date.
- Each row in the grid represents an order, and each column represents an attribute, or data field.
- By default, orders display in descending order from latest to earliest purchase date.
- Use the standard controls to sort and filter the list, find orders, and apply actions to selected orders.
- You can view existing orders, and create new orders. The tabs above the pagination controls can be used to filter the list, change the default view, change and rearrange columns, and export data.
- The selection of columns and their order in the grid can be changed according to your preference. The new layout can be saved as a grid “view.” By default, only nine of twenty available columns are included in the grid.
- The Search box in the upper-left of the Orders grid can be used to find specific orders by keyword, or by filtering the order records in the grid.

MAGENTO ORDERS

DASHBOARD

SALES

CATALOG

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

Create New Order

Search by keyword



Filters

Default View

Columns

Export

Actions

3 records found

20 per page



1 of 1

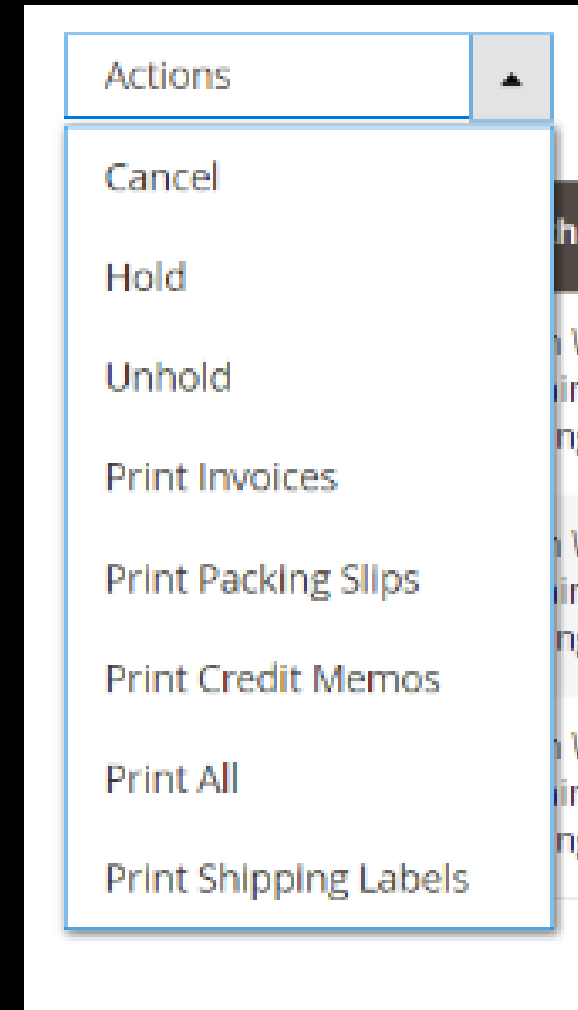


<input type="checkbox"/>	ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000003	Main Website Main Website Store English	Jun 30, 2017, 22:51:19 PM	Veronica Costello	Veronica Costello	\$132.30	\$132.30	Pending	View
<input type="checkbox"/>	000000002	Main Website Main Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$39.64	\$39.64	Complete	View
<input type="checkbox"/>	000000001	Main Website Main Website Store English	Jun 07, 2017, 19:59:44 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	View

MAGENTO ORDERS

To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.

Control	Description
Actions	<p>Lists all actions that can be applied to selected orders. To apply an action to an order or group of orders, mark the checkbox in the first column of each order.</p> <p>Order actions: Cancel / Hold / Unhold / Print / Invoices / Print Packing Slips / Print Credit Memos / Print All / Print Shipping Labels / Batch Process</p>
Mass Actions	<p>Can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that is subject to the action. Options: Select All / Unselect All / Select Visible / Unselect Visible</p>
Submit	<p>Applies the current action to the selected order records.</p>
Edit	<p>Opens the order in edit mode.</p>



ORDER WORKFLOW

- When a customer places an order, a sales order is created as a temporary record of the transaction. In the Orders grid, sales orders initially have a status of “Pending,” and can be canceled at any time until the payment is processed. After payment is confirmed, the order can be invoiced and shipped.
- Step 1: Place OrderThe checkout process begins when the shopper clicks the Go to Checkout button on the shopping cart page or reorders directly from their customer account.
- Step 2: Order PendingIn the Orders grid, the status of the sales order is initially Pending. Payment has not been processed, and the order can still be edited or canceled.
- Step 3: Receive PaymentThe status of the order changes to Processing when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.

- **Step 4: Invoice Order**An order is typically invoiced after payment is received. Some payment methods generate an invoice automatically when payment is authorized and captured. The payment method determines which invoicing options are needed for the order. After the invoice is generated and submitted, a copy is sent to the customer.
- **Step 5: Book a Single Shipment**When the shipment detail is complete, the shipment is booked, and the packing slip and shipping label are printed. The customer receives notification, and the package is shipped. If tracking numbers are used, the shipment can be tracked from the customer's account.**Book a Batch of Shipments** (Magento Shipping only) Enter and process the shipment information for multiple orders as a batch.
- **Step 6: Create a Dispatch**(Magento Shipping only) Create a dispatch that lists the packages that are ready for pickup and print the manifest.

ORDER STATUS

- All orders have an order status that is associated with a stage in the order processing workflow. The status of each order is shown in the Status column of the Orders grid. Your store has a set of predefined order status and order state settings. The order state describes the position of an order in the workflow.

Order Status	Status Code	Order Status	Status Code
Processing	processing	Complete	complete
Suspected Fraud	Fraud	Closed	closed
Pending Payment	pending_payment	Canceled	canceled
Payment Review	payment_review	PayPal Canceled Reversal	paypal_canceled_reversal
Pending	Pending	Pending PayPal	pending_paypal
On Hold	Holded	PayPal Reversed	paypal_reversed
Open	STATE_OPEN		

Create New Order

Search

Reset Filter

Export to:

CSV

Export

Actions

2 records found

20



per page

<

1

of 1

>

<input type="checkbox"/>	Order	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>			From  To 			From To	From To	<input type="text"/>	
<input type="checkbox"/>	000000002	Main Website Main Website Store English	Jun 7, 2015 8:21:32 PM	Veronica Costello	Veronica Costello	\$60.62	\$60.62	Closed	View
<input type="checkbox"/>	000000001	Main Website Main Website Store English	Jun 7, 2015 8:21:30 PM	Veronica Costello	Veronica Costello	\$36.39	\$36.39	Processing	View

THEMES

- A theme is a collection of files that determines the visual presentation of your store. When you first install Magento, the design elements of the store are based on the “Default” Theme.
- In addition to the initial default theme that comes with your Magento installation, there is a wide variety of themes that are available “off the shelf” on Magento Connect.
- A responsive theme adjusts the page layout to fit the view port of the device. Magento’s sample “Luma” theme has a flexible, responsive layout that can be viewed from the desktop, tablet, or mobile device.
- Magento themes include layout files, template files, translation files, and skins. A skin is a collection of supporting CSS, images, and JavaScript files that together, create the visual presentation and interactions that your customers experience when they visit your store.
- Themes and skins can be modified and customized by a developer or designer who has knowledge of Magento theme design and access to your server.



- **Using the Default Theme:**

- Magento's default responsive theme renders the display of your storefront for different devices, and incorporates best practices for desktop, tablet, and mobile devices. Some themes are designed to be used only with specific devices. When Magento detects a specific browser ID, or user agent, it uses the theme that is configured to be used for the specific browser.

- **Installing a New Theme:**

- When you first install Magento, the design elements of the store are based on the "Default" theme. The Luma theme is also available if you installed the sample data. You can modify a theme, add themes created by others, or create new ones. Magento Marketplace contains a growing selection of themes that you can install to change the appearance of your store.







- **Theme Assets:**

- The term static files refers to the collection of assets, such as CSS, fonts, images, and JavaScript, that is used by a theme. The location of static files is specified in the Base URL configuration.
- A digital signature can be added to the URL of each static file to make it possible for browsers to detect when a newer version is available. The newer version of the file is used if the signature differs from what is stored in the browser's cache.
- For a standard installation, the assets associated with a theme are organized in the web folder at the following location below the Magento root.
- `[magento_root]/app/design/frontend/Magento/[theme_name]/web`

File Type	Description
CSS	Directory that contains the CSS files that control the visual styling that is associated with the skin. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/css
Fonts	Directory that contains the fonts that are available to be used by the theme. Location on server: [magento]/app/design/frontend/Magento/[theme]/web/fonts
Images	Directory that contains all images used by the theme, including buttons, background textures, and so on. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/images
JS	Directory that contains theme-specific JavaScript routines and callable functions. Example location on server: [magento]/app/design/frontend/Magento/[theme]/web/js

- **Scheduling Design Changes:**



- Design changes can be scheduled in advance, so they go into effect on schedule. You can use scheduled design changes for seasonal changes, promotions, or just to add variation.

Store	Design	Date From	Date To
<input type="text"/>	<input type="text"/>	From  To 	From  To 
Main Website Main Website Store Default Store View	2	Dec 6, 2015	Dec 30, 2015


DESIGN CHANGE


General

General Settings

Store *  

Custom Design *

Date From 

Date To 

MAGENTO SSL

- There are many factors that count when it comes to running a successful ecommerce store that should be considered in the early stages of a business.
- One of them is to provide your users a secure platform where they do not have to worry about their privacy. Using SSL certificates to protect your online store has become a standard procedure in the online business sphere.
- What is SSL?
 - SSL- Secure Socket Layer certificate is used to secure a website as it establishes an encrypted link between the web server and a browser. The biggest advantage of SSL is that the data between encrypted link always remains private.
 - In simple words, adding SSL Certificate to the store means that you are protecting the user's private information such as login credentials, credit card information, and other sensitive data.
- Unsecure base URLs begin with "http," and secure base URLs begin with "https."
 - Unsecure Base URL <http://www.yourdomain.com/magento/>
 - Secure Base URL <https://www.yourdomain.com/magento/>
 - URL with IP address <http://10.9.220.154/magento/>

- Enable Magento SSL
- Open the admin panel of your Magento store and then navigate to **System** → **Configuration**:
- Now, click on **Web** under **General** tab:
- Unfold the **Secure** section.
 - First, update the **Base URL** field by changing http to https. Then select **Yes** for **Use Secure URLs in Frontend** and **Use Secure URLs in Admin fields**:
 - **Use Secure URLs on Storefront**: By selecting **Yes**, all of your storefront pages will open with https.
 - **Use Secure URLs in Admin**: By selecting **Yes**, your store admin panel will be open with https.
 - Now just click on **Save Config** button:

Base URLs (Secure)



Any of the fields allow fully qualified URLs that end with '/' (slash) e.g. <https://example.com/magento/>

Secure Base URL
[store view]

Specify URL or , or placeholder.

Secure Base Link URL
[store view]

May start with or placeholder.

Use system value

Secure Base URL for Static View Files
[store view]

May be empty or start with , or placeholder.

Secure Base URL for User Media Files
[store view]

May be empty or start with , or placeholder.

Use Secure URLs on Storefront
[store view]



Enter https protocol to use Secure URLs on Storefront.

Use system value

Use Secure URLs in Admin
[global]



Enter https protocol to use Secure URLs in Admin.

Use system value

CUSTOMER MANAGEMENT

- As you continue to maintain and expand your store, you will manage customer accounts and customer groups in the Admin. You can access the customer management tools from the Customers menu.
- The header of every page in your store extends an invitation for shoppers to *Log in or register* for an account with your store. Customers who open an account enjoy a range of benefits, including:
 - **Faster checkout** — Registered customers move through checkout faster because much of the information is already in their accounts.
 - **Self service** — Registered customers can update their information, check the status of orders, and even reorder from their accounts.
- Customers can access their account by clicking the **My Account** link in the header of the store. From their account, customers can view and modify information, including past and current addresses, billing and shipping preferences, newsletter subscriptions, wish list, and more.

CUSTOMERS MENU

- The Customers menu provides access to customer account management tools, and gives you the ability to see who is currently online in your store.

The screenshot displays the 'Customers' menu interface. On the left is a dark sidebar with navigation icons for Dashboard, Sales, Catalog, Customers (highlighted), and Marketing. The main content area has a search bar, a search icon, a notification bell with '2', and a user profile 'admin'. Below this is a table with columns: Group, Phone, ZIP, Country, State/Province, Customer Since, Web Site, Confirmed email, Account Created in, Date of Birth, Tax VAT Number, Gender, and Action. A table with 14 columns and 1 row is shown. The first row contains the following data: example.com, General, (555) 229-3326, 49628-7978, United States, Michigan, Mar 1, 2018 3:11:18 PM, Main Website, Confirmation Not Required, Default Store View, Dec 15, 1973, , Female, Edit.

Customers

All Customers

Now Online

Customer Groups

Search

Filters

Default View

Columns

Export

20 per page

1 of 1

Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax VAT Number	Gender	Action
example.com	(555) 229-3326	49628-7978	United States	Michigan	Mar 1, 2018 3:11:18 PM	Main Website	Confirmation Not Required	Default Store View	Dec 15, 1973		Female	Edit

- All Customers

- The Customers grid lists all customers who have registered for an account with your store or were added by the administrator.

- Now Online

- The Now Online option on the Customers menu lists all customers and visitors who are currently online in your store. The interval of time that customers are shown as currently online is set in the configuration, and determines how long the customer's activity is visible from the Admin. By default, the interval is fifteen minutes.

- To configure the time interval:






- On the *Admin* sidebar, go to **Stores > Settings > Configuration**.
- In the panel on the left, expand **Customers** and choose **Customer Configuration**.
- Expand the **Online Customers Options** section. Then, do the following:
 - In the **Online Minutes Interval** field, enter the number of minutes for the customer session to be visible from the Admin. Leave the field empty to accept the default interval of fifteen minutes.
 - In the **Customer Data Lifetime** field, enter the number of minutes before any unsaved data entered by the customer expires.


- Customer Groups:

- Customer groups determine which discounts are available and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.

ID	Group	Tax Class	Action
0	NOT LOGGED IN	Retail Customer	Edit
1	General	Retail Customer	Select ▼
2	Wholesale	Retail Customer	Select ▼
3	Retailer	Retail Customer	Select ▼
5	Group 5	Europe Customer	Select ▼
6	Group 6	Retail Customer	Select ▼
7	Group 7	Europe Customer	Select ▼
8	Group 8	Retail Customer	Select ▼

CATALOG

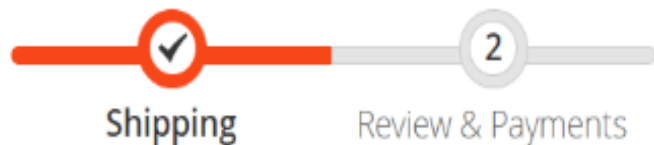
-  CUSTOMERS
-  MARKETING
-  CONTENT
-  REPORTS
-  STORES

- 
- To create a customer group:
 - On the *Admin* sidebar, go to **Customers > Customer Groups**.
 - Click **Add New Customer Group** .
 - Enter a unique **Group Name** less than 32 characters to identify the group.
 - Select the **Tax Class** that applies to the group.
 - When complete, click **Save Customer Group**

MAGENTO SHIPPING

- Studies show that stores offering customers a choice of several shipping methods have higher conversion rates than those that use a single method for all shipments. In this section, you will learn how to set up a variety of shipping methods and carriers, and print shipping labels.
- The shipping configuration establishes the
 - point of origin for all shipments,
 - your shipping policy, and
 - the handling of shipments to multiple addresses.
 -

- Point of Origin
- The point of origin is used to calculate the charge for shipments made from your store or warehouse, and also determines the tax rate for products sold
- Multiple Addresses
- The Multiaddress Shipping options enable customers to ship an order to multiple addresses during checkout, and determine the maximum number of addresses to which an order can be shipped.
- Shipping Policy
- A shipping policy should explain your company's business rules and guidelines for shipments. For example, if you have price rules that trigger free shipping, you can explain the terms in your shipping policy.
- To display your shipping policy during checkout, complete the Shipping Policy Parameters in the configuration. The text appears when customers click the "See our shipping policy" link during checkout.



Shipping Address

Veronica Costello ✓

6146 Honey Bluff Parkway

Calder, Michigan 49628-7978

United States

[\(555\) 229-3326](#)

+ New Address

Shipping Methods

[See our Shipping Policy](#)

\$5.00

Fixed

Flat Ra

Free standard shipping is available for all orders within the contiguous U.S.

Order Summary

1 Item in Cart

Shipping Policy Parameters



Apply custom Shipping Policy
[website]

Yes



Shipping Policy
[store view]

- Basic Shipping Methods
- Magento supports a wide range of shipping methods and carriers. In this section you will learn how to set up shipping methods that do not require an account with a third-party provider:
- Free Shipping: Free shipping is one of the most effective promotions you can offer. It can be based on a minimum purchase, or set up as a cart price rule that is applied when a set of conditions is met. If both apply to the same order, the configuration setting takes precedence over the cart rule.
- Flat Rate: Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple shipping solution, especially when used with the flat-rate packaging that is available from some carriers. When enabled, Flat Rate appears as an option during checkout. Because no specific carrier is specified, you can use a carrier of your choice.


- Table Rates: The table rate shipping method references a table of data to calculate shipping rates based on a combination of conditions, including:
 - Weight v. Destination
 - Price v. Destination
 - Number of Items v. Destination
- For example, if your warehouse is in Los Angeles, it costs less to ship to San Diego than to Vermont. You can use table rate shipping to pass the savings on to your customers.
- The data that is used to calculate tables rates is prepared in a spreadsheet and imported into your store. When the customer requests a quote, the results appear in the shipping estimate section of the shopping cart.
- Dimensional Weight: Dimensional weight, sometimes called volumetric weight, is a common industry practice that bases the transportation price on a combination of weight and package volume. In simple terms, dimensional weight determines the shipping rate based on the amount of space a package occupies in the cargo area of the carrier. Dimensional weight is typically used when a package is relatively light compared to its volume.

- Shipping Labels
- Magento includes a high level of integration with major shipping carriers, which gives you access to carrier shipping systems to track orders, create shipping labels, and more. Shipping labels can be created for regular shipments and products with return merchandise authorization. In addition to the information provided by the shipping carrier, the label also includes the Magento order number, number of the package, and the total quantity of packages for the Magento shipment.

P	
USPS PRIORITY MAIL[®]	
<small><FromName> <FromFirm> <FromAddress1> <FromAddress2> <FromCity><FromState><FromZip5><FromZip4></small>	
<small><RCO></small>	
<small><ToName> <ToFirm> <ToAddress1> <ToAddress2> <ToCity><ToState><ToZip5><ToZip4></small>	
	
USPS SIGNATURE TRACKING #	
	
<small><SignatureConfirmationNumber></small>	
Electronic Rate Approved # 699320	


PAYMENTS

- Magento supports a variety of payment methods, services, and gateways that you can offer for your customers' convenience.
- Basic Payment Methods / Offline payment:
 - The payment methods covered in this section are built in to Magento, and do not require the services of a third-party payment processing company.
 - Check / Money Order
 - Cash on Delivery
 - Bank Transfer
 - Purchase Order
 - Zero Subtotal Checkout

- 
- Online Payment: Magento supports numerous online payment solutions like
 - paypal,
 - Braintree,
 - authorized.net
 - PCI Compliance: Payment by credit card or Debit card and other options

NEWSLETTERS

- Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available.
- Magento gives you the ability to publish and distribute newsletters to customers who have subscribed, plus tools to produce your newsletter, build and manage your list of subscribers, develop content, and drive traffic to your store.
- You can also use [Page Hierarchy](#) to create an archive of past issues.
- You can add capabilities by integrating your Magento installation with a third-party newsletter service provider and by adding extensions.
- You can require customers to click a confirmation link that is sent by email to confirm the subscription.
- You can create as many newsletter templates as you need for different purposes. You might send a weekly product update, a monthly newsletter, or annual holiday newsletter. Newsletter templates can be prepared with HTML markup, or as plain text. Unlike HTML, plain text newsletters contain no images, rich text, or formatted links. In the grid, the Template Type column indicates whether a template is HTML or text.

- 
- Sending Newsletters
 - To manage the load on the server, newsletters with many subscribers are sent in a queue of multiple batches. You can check the newsletter queue periodically to check the status, and see how many have been processed. Any problems that occur during transmission appear on the Newsletter Problem Report.
 - Managing Subscribers
 - As a best practice you should manage your subscription list on a regular basis, and make sure to process any requests to unsubscribe. In some jurisdictions, it is required by law that requests to unsubscribe are processed within a specific period of time.
 - You can also Export the List of Subscribers



Newsletter Subscribers



admin ▾

Search

[Reset Filter](#)

Export to:

CSV ▾

Export

Unsubscribe ▾

Submit

Unsubscribe

20 ▾

per page



1

of 1



<input checked="" type="checkbox"/>	ID	Email	Type	Customer First Name	Customer Last Name	Status	Web Site	Store	Store View
<input type="checkbox"/>									
<input checked="" type="checkbox"/>	1	janesmith@example.com	Customer	Jane	Smith	Subscribed	Main Website	Main Website Store	Default Store View

DASHBOARD



SALES



PRODUCTS



CUSTOMERS



MARKETING

WIDGETS

- A widget is a snippet of code that makes it possible to display a wide range of content and place it at specific block references in your store.
- Many display real-time, dynamic data and create opportunities for your customers to interact with your store.
- The Widget tool makes it easy to place existing content such as blocks with images and text, and interactive elements most anywhere in your store.
- You can use widgets to create landing pages for marketing campaigns, display promotional content at specific locations throughout the store.
- Widgets can also be used to add interactive elements and action blocks for external review systems, video chats, voting, and subscription forms and image sliders.

New Products



Bolo Sport Watch

\$49.00

Add to Cart



Luma Analog Watch

\$43.00

Add to Cart



Dual Handle Cardio Ball

\$12.00

Add to Cart



Savvy Shoulder Tote

\$24.00 Regular Price \$32.00

Add to Cart



Endeavor Daytrip Backpack

\$33.00

Add to Cart



Items 1 to 5 of 6 total



- **Widget Types:**
- **Creating a Widget:**The process of creating a widget is nearly the same for each type. You can follow the first part of the instructions, and then complete the last part for the specific type of widget.
- Step 1: Choose the Type
- Step 2: Specify Where It Goes
- Step 3: Complete the Options
- Step 4: Check It Out!
- For details and screen shot
https://docs.magento.com/m2/ce/user_guide/cms/widget-create.html

SEO FOR MAGENTO

- Search engine optimization is the practice of fine-tuning the content and presentation of a site to improve the way the pages are indexed by search engines. Magento includes a number of features to support your ongoing SEO effort.
- Commerce Resources
- Meta Data: Your store is loaded with places where you can enter keyword-rich meta data to improve the way search engines index your site. While setting up your store, you might enter preliminary meta data, with the intention of finishing it later. Over time, you can fine-tune the meta data to target the buying patterns and preferences of your customers.
 - Meta Title
 - Meta Keywords
 - Meta Description
 - Canonical Meta Tag The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content.
 - Rich Snippets

- Using a Sitemap:

- A site map improves the way your store is indexed by search engines, and is specifically designed to find pages that might be overlooked by web crawlers. A site map can be configured to index all pages and images.
- When enabled, Magento creates a file called `sitemap.xml` that is saved to your installation in the location that you specify. The configuration gives you the ability to set the frequency of the updates, and the priority for each type of content. Your site map should be updated as frequently as the content on your site changes, which might be daily, weekly, or monthly.

- URL Rewrites:

- The URL Rewrite tool lets you change any URL that is associated with a product, category, or CMS page. When the rewrite goes into effect, any links that point to the previous URL are redirected to the new address.
- The terms *rewrite* and *redirect* are often used interchangeably, but refer to slightly different processes. A URL rewrite changes the way a URL appears in the browser. A URL redirect updates the URL that is stored on the server. A URL redirect can be either temporary or permanent. Your store uses URL rewrites and redirects to make it easy for you to change the URL key of a product, category, or page and preserve existing links.

GOOGLE ANALYTICS FOR MAGENTO

- Google Universal Analytics gives you the ability to define additional custom dimensions and metrics for tracking, with support for offline and mobile app interactions, and access to ongoing updates.

Google Analytics 

Enable [store view]	Yes	▼
Account Number [store view]	<input type="text"/>	
Anonymize IP [store view]	No	▼
Enable Content Experiments [store view]	No	▼

FTP MANAGEMENT

- What is FTP?
- FTP: "A standard network protocol used to copy a file from one host to another."
- FTP, or File Transfer Protocol, is, as defined by Wikipedia: "A standard network protocol used to copy a file from one host to another over a TCP/IP-based network, such as the Internet."
- Essentially, it allows you to copy a file(s) from one computer to another.
- File Transfer Protocol (FTP) is a standard Internet protocol for transmitting files between computers on the Internet over TCP/IP connections. FTP is a client-server protocol where a client will ask for a file, and a local or remote server will provide it.
- The end-users machine is typically called the local host machine, which is connected via the internet to the remote host—which is the second machine running the FTP software.
- There are plenty of FTP clients available in market like filezilla, cute ftp etc . PHP also provide lots of functions to **handle files on FTP server** .

CONNECT AND LOGIN TO THE FTP SERVER

- we have to connect to ftp server using a PHP function i.e ftp_connect() . After connection we have to login to ftp server using ftp_login() function providing username and password .

```
$ftp_host = 'ftp.example.com';
$ftp_username = 'ftpuser';
$ftp_password = '*****';
// open an FTP connection
$conn_id = ftp_connect($ftp_host) or die("Couldn't connect to $ftp_host");
// try to login
if(@ftp_login($conn_id, $ftp_username, $ftp_password)){
    echo "Connected as $ftp_username@$ftp_host";
}else{
    echo "Couldn't connect as $ftp_username";
}
// close the connection
ftp_close($conn_id);
```


- **Upload File to the FTP Server**

```
// local & server file path
```

```
$localFilePath = 'index.php';
```

```
$remoteFilePath = 'public_html/index.php';
```

```
// try to upload file
```

```
if(ftp_put($conn_id, $remoteFilePath, $localFilePath, FTP_ASCII)){
```

```
    echo "File transfer successful - $localFilePath";
```

```
}else{
```

```
    echo "There was an error while uploading $localFilePath";
```

```
}
```

- **Download File from the FTP Serve**

//local & server file path

```
$localFilePath = 'index.php';
```

```
$remoteFilePath = 'public_html/index.php';
```

```
// try to download a file from server
```

```
if(ftp_get($conn_id, $localFilePath, $remoteFilePath, FTP_BINARY)){
```

```
    echo "File transfer successful - $localFilePath";
```

```
}else{
```

```
    echo "There was an error while downloading $localFilePath";
```

```
}
```

- **Delete File on the FTP Server**

```
// server file path
$file = 'public_html/index_old.php';
// try to delete file on server
if(ftp_delete($conn_id, $file)){
    echo "$file deleted successful";
}else{
    echo "There was an error while deleting $file";
}
```