



# Magento Enterprise Edition **User Guide**

Version 1.14.1

Part I:

Getting Started

Basic Configuration



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Enterprise  
EDITION

# Getting Started





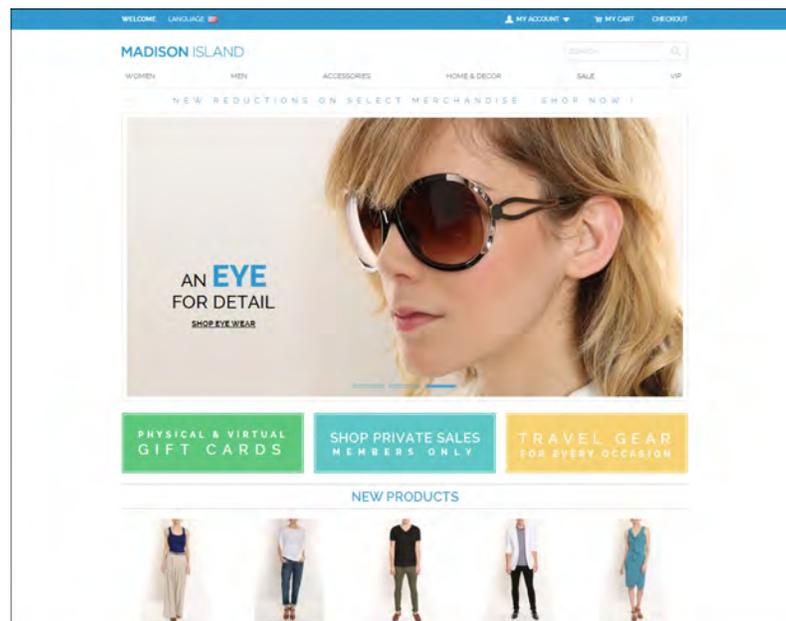
## Chapter 1:

# Welcome to Magento!

Magento Enterprise Edition empowers you to create rich, differentiated consumer experiences that maximize revenue and help you achieve the highest levels of success. Here are a few ways it can help you drive revenue, and save time and money:

- Instant access to robust enterprise features. No other platform provides the variety of built-in tools and features, at any price point.
- Operate more efficiently. An intuitive platform that is easy to set-up, implement, and manage by non-technical resources—or even by yourself.
- Unparalleled flexibility and control. Whether you're refreshing your brand or scaling up your business, invest in a platform that integrates with your existing business systems to support your business as it grows.

Magento Enterprise Edition is the only eCommerce solution that delivers enterprise-class capabilities and performance at the most compelling lowest total cost of ownership, with flexibility and scalability to support your aggressive business goals.



*Magento Enterprise Edition*

# System Requirements

For a standard installation, Magento Enterprise Edition ver. 1.14.1 requires the following:

SYSTEM REQUIREMENTS	
Environment	LAMP (Linux, Apache, MySQL, and PHP) or LNMP stack
Operating System	Linux x86-64
Web Server	Apache 2.x Nginx 1.7.x
Database	MySQL 5.6 (Oracle or Percona)
PHP	PHP 5.4 PHP 5.5
SSL	A valid security certificate is required for HTTPS. Self-signed certificates are not supported.
<b>Supported Technologies</b>	
<a href="#">Redis</a>	Redis can be used for session or cache storage.
<a href="#">Memcached</a>	Memcached can be used for session or cache storage.
<a href="#">Apache Solr</a>	(Magento Enterprise Edition only) Can be used as an alternate search engine.

Visit our website for the [System Requirements](#) of previous releases.

## Installation

Magento Enterprise Edition is typically installed by an IT department or independent professional. To find a qualified service provider, see our list of [Solutions Partners](#).

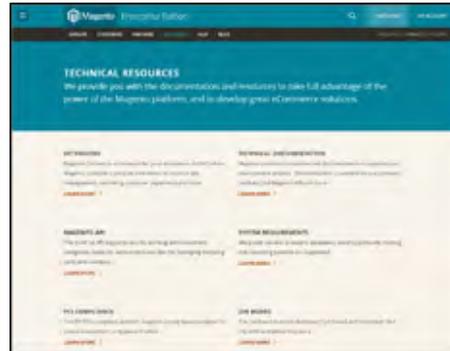
To learn more about installing or upgrading Magento, see the “Upgrading Magento Enterprise” document that you received when you purchased Magento Enterprise Edition. For the most up-to-date information on updates, changes, new features, bug fixes, and other important information about each version of Magento Enterprise Edition, visit our website to view the [Release Notes](#).

## Resources

Magento provides a wealth of business and technical resources, self-help tools, and services to help you succeed. Our team is here to help you plan, build, and optimize your online channel.

### Technical Resources

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



### Knowledge Base

Got a question? The Magento Knowledge Base has an answer. Our Knowledge Base is full of helpful articles, how-to instructions, and reference material.

### eBooks and Tips

You'll find practical and timely information in the selection of eBooks, articles and white papers that is available on our site.





## Wiki

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The Magento Wiki is where you can learn from others, and share what you know! To help you get started, we've gathered a list of articles that will help you on your way.

## Forums

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



## Blog

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



## Webinars

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Expand your horizons! Register to attend the upcoming Magento webinar, or catch up on previous, archived webinars.





## Help & Support

Our expert tech support team is here to help you with a wide variety of technical support issues, including basic design and store configuration.

## Training & Certification

Magento has training courses for every role, including marketers, product managers, designers and developers. Magento U courses provide practical, hands-on exercises that help students learn quickly.



## Partners

Need help to set up or fine-tune your store? Magento's certified developers and consultants are experts in store setup, design, integration and marketing. Find a certified expert and jumpstart your business today!

## Expert Consulting Services

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



# Join the Conversation!



## Facebook

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

## Twitter

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Follow us on Twitter and hear the latest news!



## YouTube

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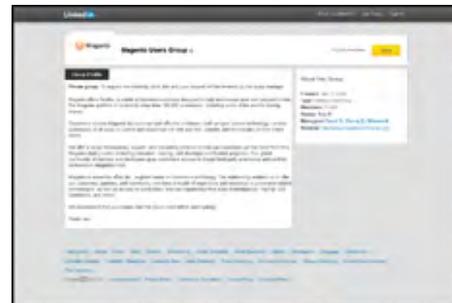
Learn while you watch videos on our YouTube channel!



## LinkedIn

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Join the users group and connect with others on LinkedIn!

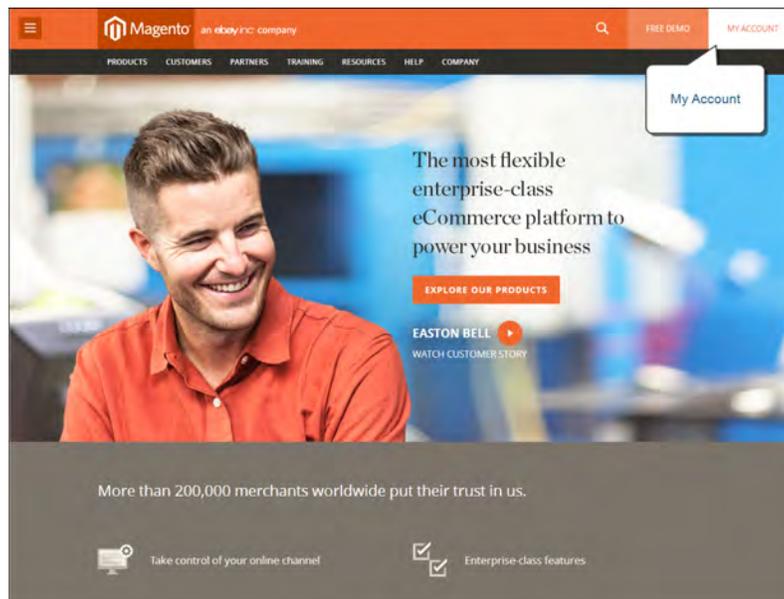




## Chapter 2:

# Your Magento Account

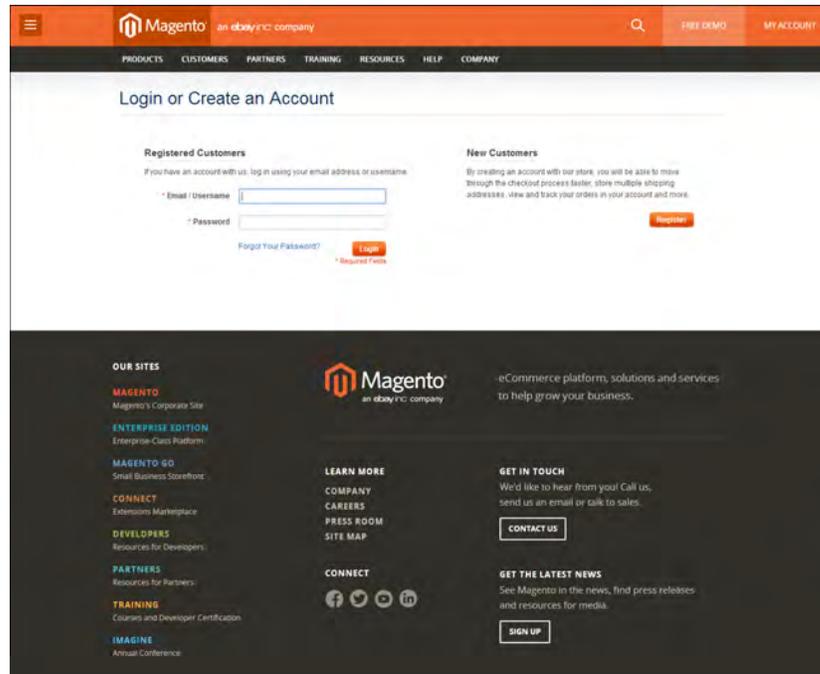
You can find the information related to the products and services you have signed up to receive, as well as your contact and billing information in the dashboard of your Magento account. Your Magento account has a separate login from your store, and can be accessed from either the Magento website or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



*Your Magento Account*

## To log in to your Magento account:

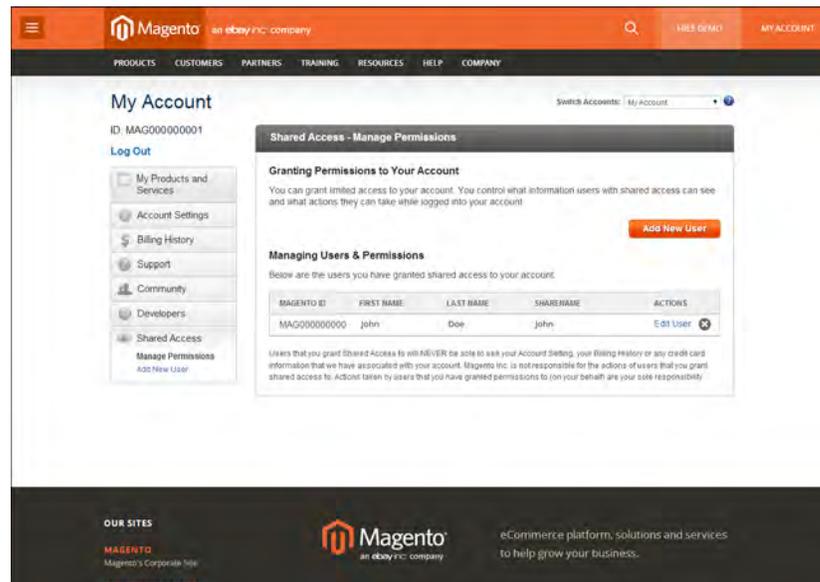
1. Navigate to the Magento site: <http://www.magento.com>
2. In the upper-right corner, click the **My Account** link.
3. Enter your **First Name**, **Last Name**, **Email Address**. Then, take a moment to share the functions your company primarily performs, and your role.
4. Enter your **User Name** or **Email** , and **Password**. Then, click the **Submit** button. Your account dashboard appears.



*Log In to Your Account*

## Sharing Your Account

Your Magento account contains information that can be useful to trusted employees and service providers who help to manage your site. As the primary account holder, you have authority to grant limited access to your account to other Magento account holders. For example, you may want to give someone the ability to open a support ticket on your behalf, or let that person download resources from your account.



*Shared Account Access*

When your account is shared, all sensitive information—such as your billing history or credit card information—remains protected. It is not shared at any time with other users.

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

### To set up a shared account:

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

- Enter the **Account ID** of the new user's Magento account.
  - Enter the **Email address** that is associated with the new user's Magento account.
5. In the Shared Information section, do the following:
    - a. Enter a **Sharename** to identify your shared account. Because the Sharename becomes an option in the Switch Accounts list, it should be something that the other person will recognize as your account.
    - b. To share your personal contact information, select the checkbox for each item that you want to make available to the other person:
      - Your Email
      - Your Phone
  6. In the Grant Account Permissions section, select the checkbox for each component of your account that you want to share.
  7. When complete, click the **Create Shared Access** button.

You are notified when the new role is saved, and the new user record appears in the Manage Users & Permissions section of the Shared Access page. The new user receives an invitation by email with instructions for accessing the shared account.

The screenshot shows the 'Shared Access - Add a New User' form in the Magento user interface. The form is divided into three main sections:

- New User Information:** Contains input fields for 'Acct ID' (with a 'New User ID' placeholder), 'Email' (with a 'Email Address' placeholder), and a note: 'The new user's email must match the email we have on file for their Magento Acct ID'.
- Shared Information:** Includes a 'Sharename' field (placeholder: 'Choose a name for share'), a 'Share Your Contact Info?' section with checkboxes for 'Your Email' and 'Your Phone', and a 'Share' button.
- Grant Account Permissions to the New User:** Features checkboxes for 'Products & Services' (with 'Magento' selected) and 'Support' (with 'Open a Case' selected).

At the bottom of the form, there is a note: 'After this user account is verified, the new user will have the specific permissions you have chosen.' and a prominent orange 'Create Shared Access' button. A disclaimer at the very bottom states: 'Users that you grant Shared Access to will NEVER be able to see your Account Setting, your Billing History or any credit card information that we have associated with your account. Magento Inc. is not responsible for the actions of users that you grant shared access to. Actions taken by users that you have granted permissions to (on your behalf) are your sole responsibility.'

*Add a New User*

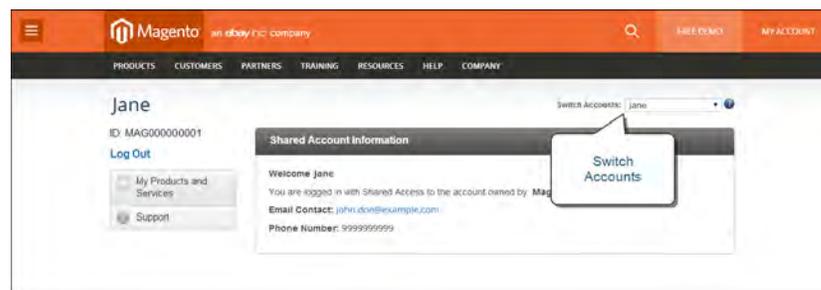
## To access a shared account:

1. When you receive an invitation to a shared account, the first thing you must do is log in to your own Magento account.

Your account dashboard has a new **Switch Accounts** listbox in the upper-right corner, with options for “My Account” and the name of the shared account.

2. To gain access to the shared account, set the **Switch Accounts** listbox to the name of the shared account.

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



*Switch Accounts*

3. In the panel on the left, click **Support**.

The Support page includes only the areas that you have permission to use. Depending on your permissions, you can create new support tickets, and view all previous activity.

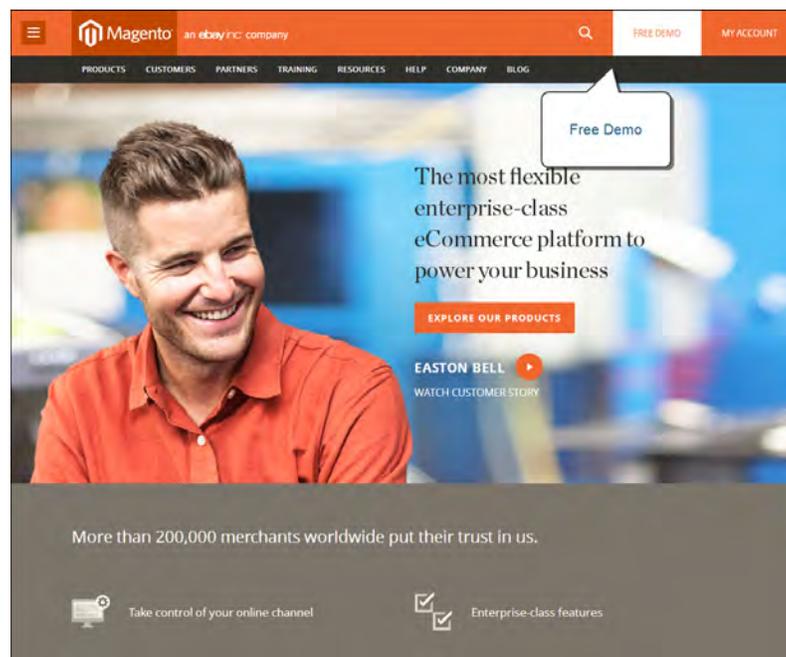
4. In the panel on the left, click **Downloads**. The Downloads section provides access to product releases, patches, documentation, sample data, and tools.
5. When you are ready to return to your own account, simply **Switch Accounts** to “My Account.”





## Chapter 3: Quick Tour

This quick tour follows the customer-decision journey that leads to a purchase on an eCommerce site powered by Magento Enterprise Edition. Each item is linked to a topic in this guide, where you can learn more about the subject. You can also follow along on your computer with the sample data.



*Free Demo*

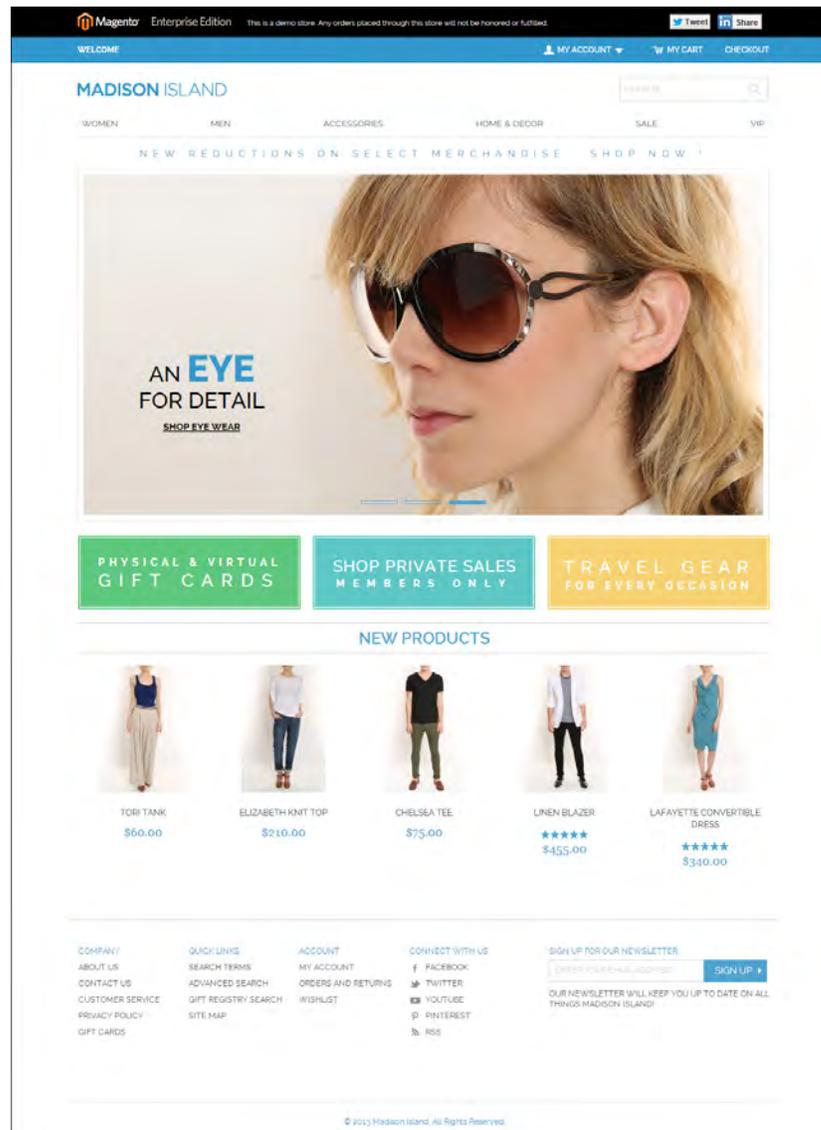
## Storefront Demo

For the storefront example, we'll use Madison Island, a fictional fashion website that we created to highlight some of Magento's key features and functionality.

### To sign up for a demo store:

1. On the Magento site, click the **Free Demo** button at the top of the page.
2. Complete the registration form, and click the **Send Request** button.

You will receive your login instructions and credentials by email.

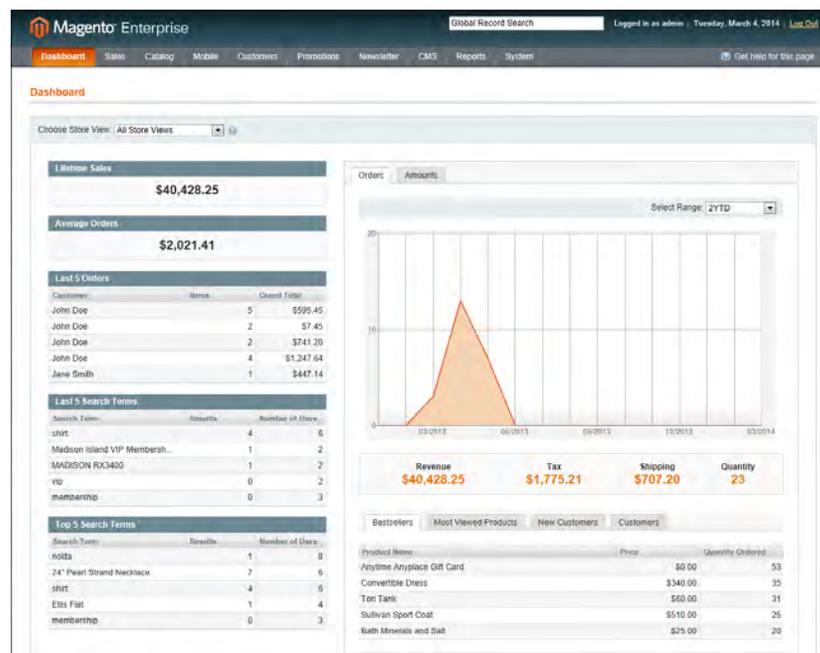


*Madison Island Storefront*

## Demo Store Admin

As we walk through Magento Enterprise Edition, we'll switch between the storefront and the store Admin. To follow along with the quick tour, you can open one browser tab to the demo Magento store, and another to the store Admin. If your Admin access times out after a period of keyboard inactivity, simply log in again and you'll be back on track.

The **Dashboard** is the first page that appears when you log in to the Admin. It's a hub of important information about the health of your eCommerce site, and includes snapshots of Lifetime Sales, Average Orders, Top Search Terms, Best Sellers, Most Viewed Items, and more.



*Demo Admin with Dashboard*

### To log in to the admin:

1. In the email you received, click the **URL** for the store Admin.
2. Enter your **User Name** and **Password**. Then, click the **Login** button.

The screenshot shows the 'Log in to Admin Panel' page. It features the Magento logo on the left. The main content area has a title 'Log in to Admin Panel' and two input fields: 'User Name:' and 'Password:'. Below the 'User Name' field is a link for 'Forgot your password?'. A 'Login' button is positioned to the right of the 'Password' field. At the bottom of the page, there is a copyright notice: 'Magento is a trademark of Magento Inc. Copyright © 2014 Magento Inc.'

*Admin Login*

## Customer Journey



### Attract New Customers

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

### Engage Your Customers

Design your site with predesigned templates, or create a custom design of your own, and give your customers tools to help them find what they want faster.



### Increase AOV

Increase average order value with relevant, targeted promotions and product suggestions that encourage your customers to shop more.



### Moment of Purchase

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



### Customer Retention

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

### Loyalty & Advocacy

Encourage customers to write product reviews, create wishlists, and join customer rewards programs. This will strengthen your relationship with your customers, who in return, will speak positively of your business to friends and family.



## Attract New Customers

Magento Enterprise Edition makes it easy to create a “search engine friendly” website to help the right customers find your store.

### Search Engine Optimization

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

### Custom URLs

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

### Meta Data

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

### Sitemap

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Link to a sitemap from the footer of your store to give customers an overview of the catalog structure, with links to all categories and products in the store. You can also easily integrate your store with Google Sitemap.

### Analytics

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

## Engage Your Customers

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

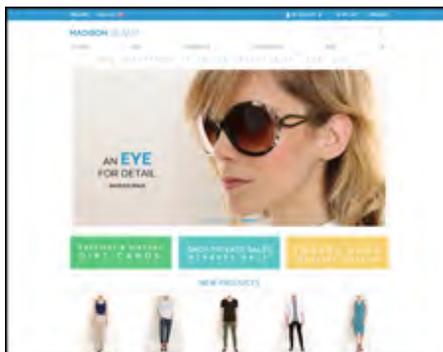


### Content Management System

Magento's robust CMS software system makes it easy to store pages or parts of pages that you can use in your store. It's so intuitive that someone without a technology background can manage site content easily.

### Design & Theme

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

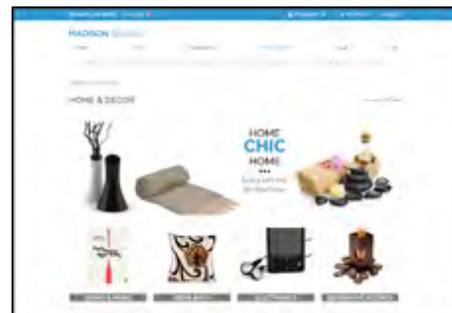


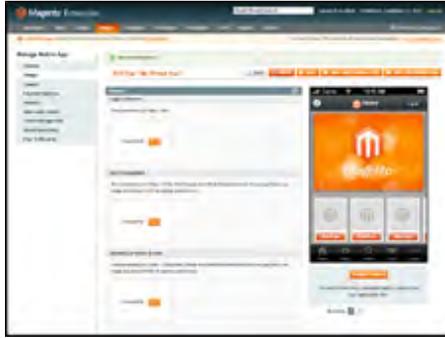
### Staging Environment

After you have designed or added new features to your site, test features and plug-ins before they go live on a password-protected private staging environment.

### Multiple Stores, Sites & Views

Control the look and feel of multiple sites, introduce new market and languages, and track analytics from a single Admin. All without purchasing additional licenses.



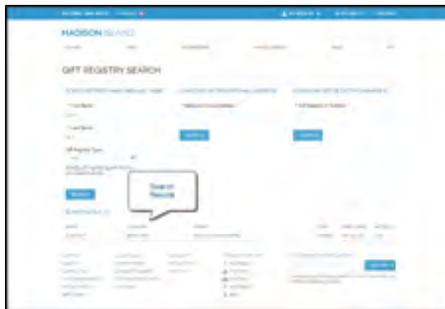
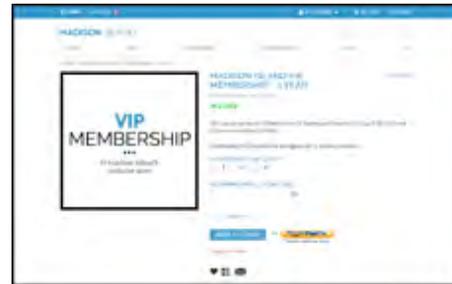


## Multiple Devices

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

## Rewards & Loyalty

Give your best customers VIP treatment. Offer exclusive access to Member Only sales or private sales to increase brand loyalty.



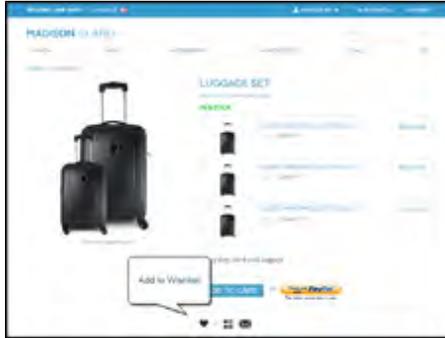
## Gift Registries

Your customers can create gift registries for special occasions and send invitations to purchase items from the gift registry. Magento keeps track of all items purchased and the quantities remaining.

## Private Sales

Private sales are a great way to leverage your customer base to generate buzz and new leads, or to offload surplus inventory. Create limited-time sale or a private sale for members only.



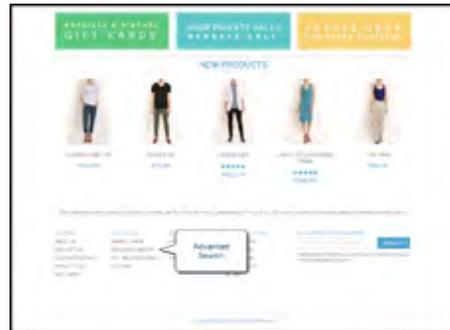


## Shopping Tools

Your store includes a set of shopping tools that create opportunities for your customers to interact and share the experience with friends.

## Sophisticated Search

Filter product by price, manufacturer, or any other criteria to reduce the time to purchase. Performance and search quality are improved with features like spelling, synonyms, stop words, and weighted attributes.



## Increase Average Order Value (AOV)

Magento Enterprise Edition provides a range of merchandising tools and other tools to help you tailor the shopping experience to your customers. This encourages your customers to put more items in their shopping carts and to spend more money.

### Targeted Promotions

Magento's rule-based engine lets you segment customers dynamically and build segments based on specific characteristics such as customer address, order history, shopping cart content, and much more.

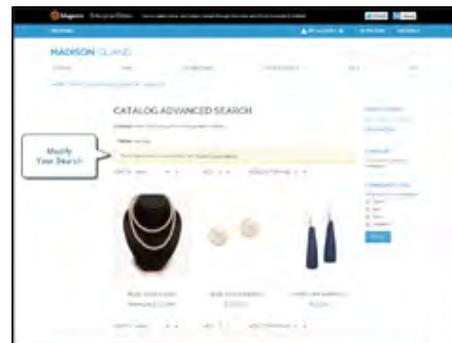


### Coupons

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

### Product Suggestions

Another way to increase AOV is to cross-sell and upsell products related to customer searches. Manage specific product suggestions easily by using a condition-based tool to administer rules.





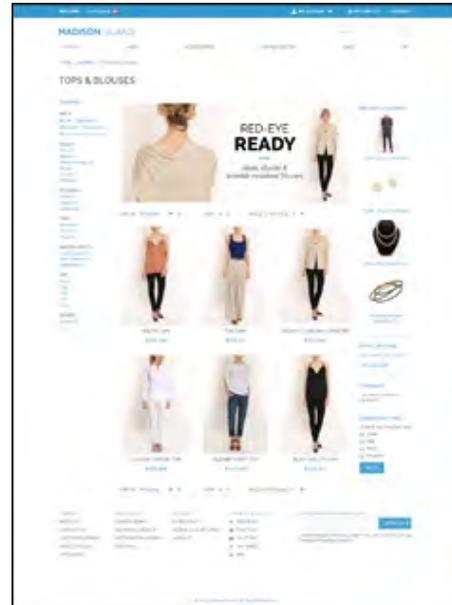
## Email Reminders

Send automated reminder emails to customers who have added items to their carts or wishlists, but haven't made a purchase. A variety of triggers can launch automated emails, including total cart value, quantity, items in the cart, and more.

## Full-Page Caching

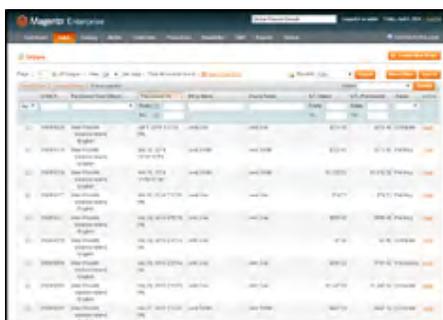
Enhance performance by caching primary pages. Caching pages improves server response times, reduces load, and increases sustainable traffic.

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



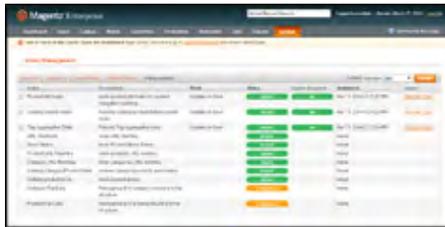
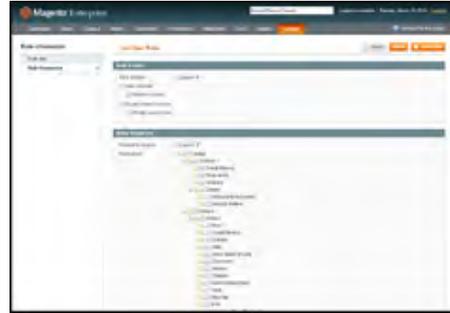
## Sales Order Archiving

Archiving orders frees resources and improves performance when sales reps are assisting customers with orders.



## User Permissions & Roles

Restrict access to data in the Admin on a “need to know” basis. Create multiple Admin roles with privileges for prices and promotions. Track and review all activity at a granular level for specific stores and websites.



## Index Management

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

## Moment of Purchase

Now that you've given your customer an engaging shopping experience, make it easy for them to complete their purchases. Magento helps you streamline the checkout process and boost conversion rates.

### Order Processing

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Magento supports a complete order processing workflow that makes it easy to track the status of orders and monitor communication between sales reps and customers.

### Shipping Labels

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Merchants have complete control over package characteristics such as weight and size. When creating shipping labels, shipping rate and barcode information originates directly from the shipping carrier and can be provided for single or multiple orders at once.

### Multiple Shipping Options

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

### Multiple Payment Options

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

### PayPal Merchant Solutions

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

### Payment Bridge

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This secure payment application is PA-DSS compliant, and makes it easier to meet PCI compliance and to industry standards for security. Magento Secure Payment Bridge is installed separately from Magento Enterprise Edition.

### Assisted Shopping

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Assisted shopping makes it easy to create orders on behalf of customers. Customer service reps have access to shopping cart contents, and can move items from wishlists to the shopping cart, order by SKU, apply coupon codes, and more.

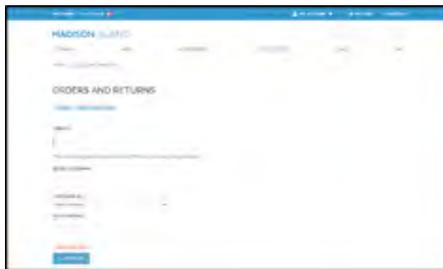
## Security

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Whether an order is fulfilled online or over the phone, Magento provides enterprise-level security and peace of mind. Magento offers CAPTCHA and SSL encryption, with best-in-breed encryption and hashing algorithms to protect the security of the system.

## Customer Retention

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



## RMA

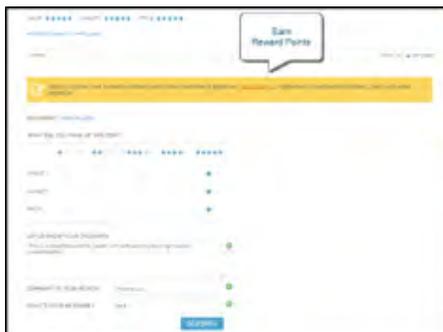
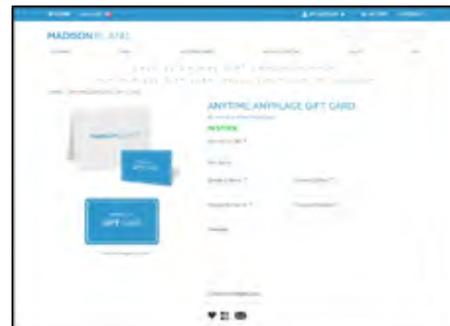
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Customers can submit requests for Return Merchandise Authorization from your store. You can create shipment orders in a carrier system, and print shipping labels with RMA numbers.

## Store Credits

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Keep customers loyal and happy by issuing refunds as store credits or virtual gift cards. This ensures that the money they spend stays with you and your merchandise.



## Reward Points

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Drive customer engagement with reward programs with award points based on a range of transactions and customer behaviors. Base redemption on a variety of factors, such as balance, customer history, and conversion rates.

## Custom Coupons

Use customer segmentation to create coupons for use on—or off—your site. Create coupons for social media or email campaigns. You can also create unique coupon codes, and design them the way you like.

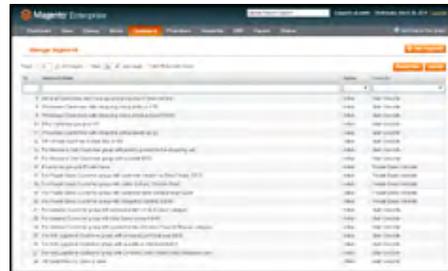


## Newsletters

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

## Target Shopping History

Encourage customers to make return purchases with targeted promotions based on their shopping history. With the Magento platform, you can easily build segments based on your customer base.



## Loyalty & Advocacy

Give customers a direct connection to your brand by allowing them to create customer accounts where they can see their purchase history, rewards, store credits, and newsletters. Make it easy for customers to create wishlists and guest registries to attract new customers. Use ratings and reviews to give new customers objective product opinions and return customers a sense of community. These features turn customer satisfaction into one of the most powerful and cost-efficient marketing tools at your disposal.

### Dashboard Snapshots

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

### Customer Accounts

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

### Advocacy Tools

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Customers who share wishlists and gift registries with family and friends are making a powerful endorsement of your brand. Customers create these personalized lists from products they choose. When shared by email or RSS feed, these simple lists are powerful advocacy tools.

### Reviews & Ratings

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

## Success!

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



## Implementation

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

## Design

You can design your own home page or work with an experienced Magento designer or Solutions Partner to customize your site.



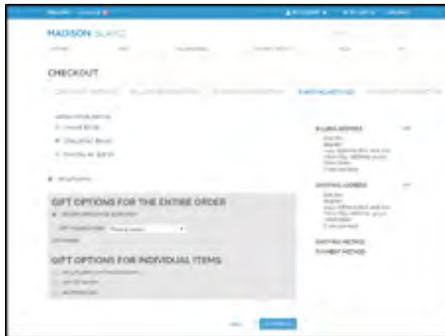
## Product Catalog

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



## Payment Methods

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

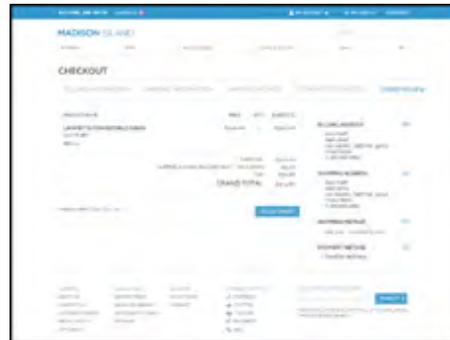


## Shipping Methods

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

## Taxes

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



## Thanks for your order!

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



Enterprise  
EDITION

## Basic Configuration





## Chapter 4: Store Admin

Your store Admin is the password-protected back office where you can set up products, promotions, manage orders, and perform other administrative tasks. This chapter provides a high-level overview of the management tasks that you can perform while running your store on a day-to-day basis.

The screenshot shows the Magento Enterprise Store Admin interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'New Order', 'CMS', 'Reports', and 'System'. The 'Catalog' menu is expanded, showing options like 'Manage Products', 'Categories', 'Attributes', 'URL Redirects', 'Rule-Based Product Relations', 'Search Terms', 'Reviews and Ratings', and 'Tags'. The main content area displays a table of products with columns for ID, Name, Type, Attribute Set Name, SKU, Price, Qty, Visibility, Status, Website, and Action. The table contains 11 rows of product data, including items like 'Black Nolita Cami-Black-S', 'Black Nolita Cami-Black-XS', 'Nolita Cami-Pink-L', 'Black Nolita Cami', 'Elli Flat', 'Broadway Pump', 'Aerie Pump', 'Plaza Platform', 'Prima Pump', 'Hudson Sneakerin Pump', 'Yuca Sneaker', and 'Studio Dress Shoe'. The interface also shows a search bar, a 'Total 578 records found' indicator, and a 'Sort' dropdown menu.

ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Website	Action
881	Black Nolita Cami-Black-S	Simple Product	Clothing	wb4002c-Black-S	\$150.00	23	Not Visible Individually	Enabled	Main Website	Edit
880	Black Nolita Cami-Black-XS	Simple Product	Clothing	wb4002c-Black-XS	\$150.00	23	Not Visible Individually	Enabled	Main Website	Edit
879	Nolita Cami-Pink-L	Simple Product	Clothing	wb4000c-Pink-L	\$150.00	10	Not Visible Individually	Enabled	Main Website	Edit
878	Black Nolita Cami	Simple Product	Clothing	wb4002M	\$150.00	25	Not Visible Individually	Enabled	Main Website	Edit
877	Black Nolita Cami	Configurable Product	Clothing	wb4002c	\$150.00	0	Catalog, Search	Enabled	Main Website	Edit
875	Elli Flat	Configurable Product	Shoes	shw005	\$250.00	0	Catalog, Search	Enabled	Main Website, Private Sales Website	Edit
874	Broadway Pump	Configurable Product	Shoes	shw004	\$410.00	0	Catalog, Search	Enabled	Main Website, Private Sales Website	Edit
873	Aerie Pump	Configurable Product	Shoes	shw003	\$390.00	0	Catalog, Search	Enabled	Private Sales Website	Edit
872	Plaza Platform	Configurable Product	Shoes	shw002	\$320.00	0	Catalog, Search	Enabled	Private Sales Website	Edit
871	Prima Pump	Configurable Product	Shoes	shw001	\$375.00	0	Catalog, Search	Enabled	Private Sales Website	Edit
870	Hudson Sneakerin Pump	Configurable Product	Shoes	shw000	\$375.00	0	Catalog, Search	Enabled	Private Sales Website	Edit
869	Yuca Sneaker	Configurable Product	Shoes	shw005	\$350.00	0	Catalog, Search	Enabled	Private Sales Website	Edit
868	Studio Dress Shoe	Configurable Product	Shoes	shw004	\$410.00	0	Catalog, Search	Enabled	Private Sales Website	Edit

Store Admin

## Admin Login

All of the basic configuration tasks are performed in the Magento backend, which is referred to in this guide as your store Admin.



*Admin Login*

### To log in to your store admin:

1. For a new Magento installation, do the following:
  - a. On the last page of the Magento Installation Wizard, click the **Go to Backend** button.
  - b. In the address bar of your browser, enter the URL that you specified in the Magento Installation Wizard, followed by the “/admin” suffix. If you specified a different suffix for the Admin during the installation, use that instead. Most Admin URLs look like this:

**`http://www.mystore.com/admin`**

2. To use the Magento EE Demo Store, enter the following URL:

**`http://enterprise-admin.user.magentotrial.com/admin/`**

You can bookmark the Admin Login page for easy access.

3. Do one of the following:
  - Enter the **User Name** and **Password** that was specified during the Magento installation.
  - If you are using the Magento EE Demo Store, use the following login credentials:

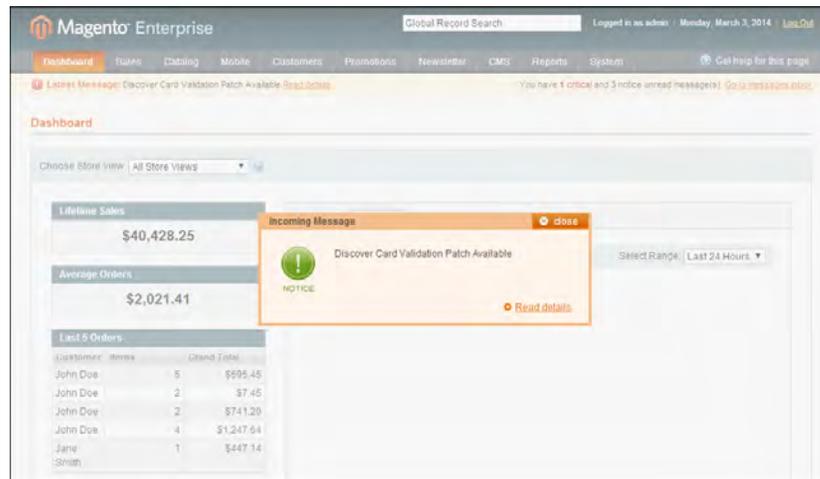
User Name:           **admin**

Password:             **123123a**

4. Click the **Login** button.

## Message Inbox

Your store has an inbox for the messages received from Magento. The messages are rated by importance, and might refer to updates, patches, new releases, scheduled maintenance, upcoming events, and more. Any message that is considered to be of major importance appears in a pop-up window when you log into your store. You can manage your message inbox much as you would manage your email. Check it often to stay up-to-date on the latest information from Magento!

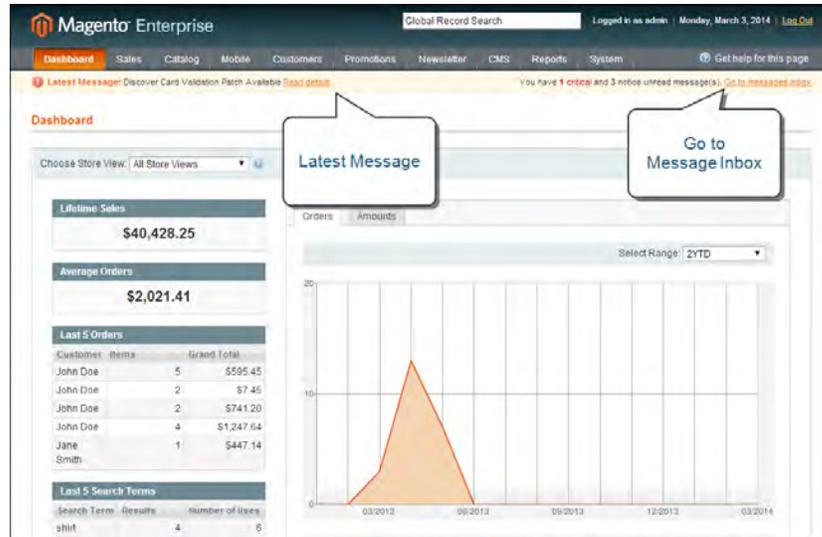


*Incoming Message*

### To manage incoming messages:

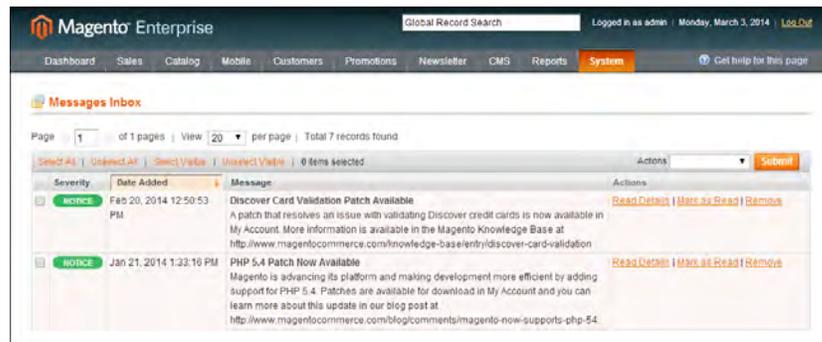
1. When the Incoming Messages box appears, do one of the following:
  - Click the **Read Details** link for more information.
  - Click the **Close** box to remove the popup and continue.

A Latest Message notice also appears to the left, just below the header of your store. As with the popup box, you can click the **Read Details** link for more information.



Message Notifications Below Header

2. To read your messages, click **Go to messages inbox**.  
The messages in your inbox are marked by severity, with the most recent at the top.
3. After reading a message, you can apply any of the following actions to the message:
  - For more information, click the **Read Details** link.
  - To keep the message, click the **Mark As Read** link.
  - To delete the message from your inbox, click the **Remove** link.

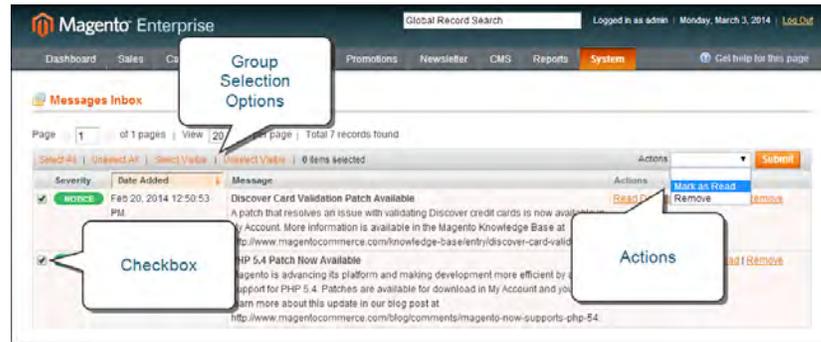


Messages Inbox

**To apply an action to multiple messages:**

1. On the Admin menu, select **System > Notifications**.
2. In your message inbox, do one of the following:
  - Select the checkbox at the beginning of each message you want to manage.
  - Click one of the group selection options above the list to select multiple messages.

3. When the messages that you want to manage are selected, set **Actions** to one of the following:
  - Mark as Read
  - Remove
4. Click the **Submit** button to complete the process.



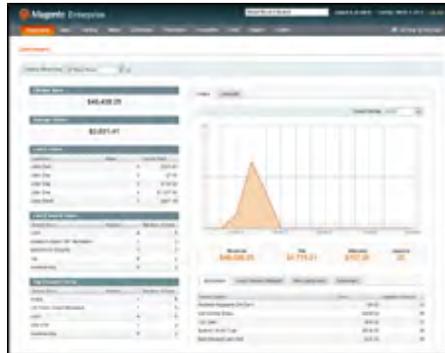
*Messages Inbox*

### Message Importance

SEVERITY	COLOR	DESCRIPTION
Critical	Red	Indicates an important, time-sensitive message.
Major	Orange	The default message severity level.
Notice	Green	Indicates that a routine operation has taken place.

# Admin Menu

All of the tools you need to manage the operation and maintenance of your store are available in the admin menu.



## Dashboard

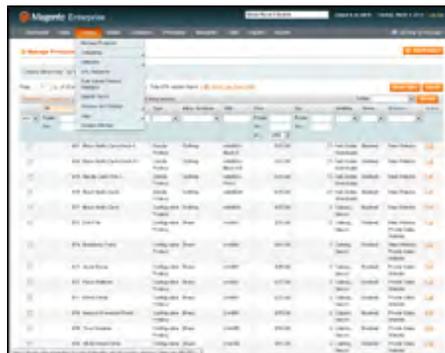
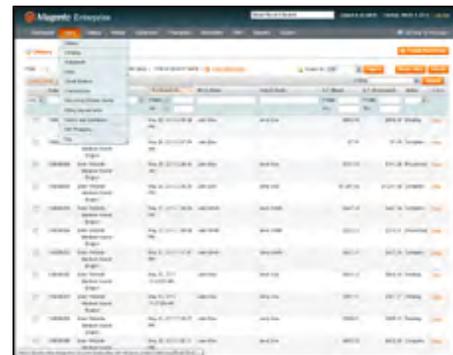
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The Dashboard gives you a quick overview of the sales and customer activity in your store. It is usually the first page that appears when you log in to the admin.

## Sales

---

The Sales menu is where you can find everything related to processing an order, including current and past orders, invoices, shipments, credit memos, terms and conditions, and taxes.



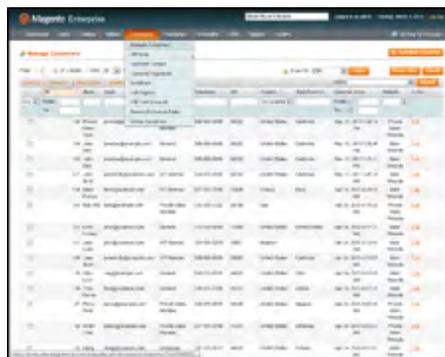
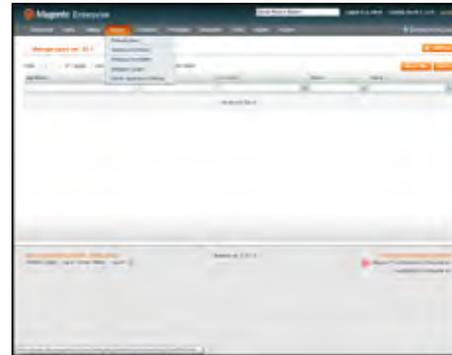
## Catalog

---

The Catalog menu controls everything related to your product catalog, including products, categories, attributes, URL rewrites, search terms and indexing, product reviews, tags, and Google Sitemap.

## Mobile

The Mobile menu is where you can configure the templates, content, and apps for various mobile devices and store views.

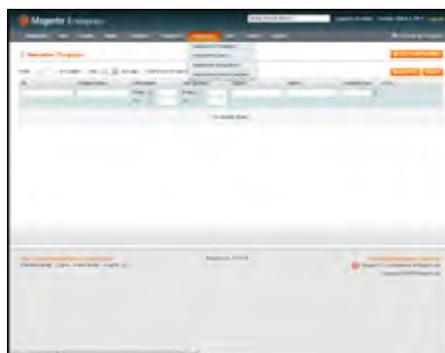
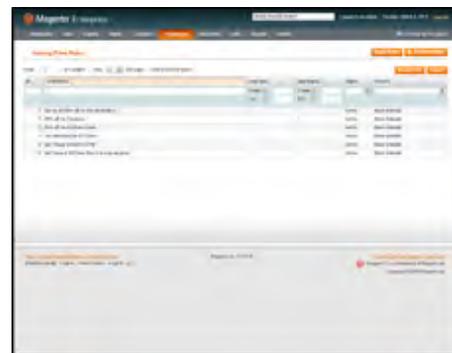


## Customers

The Customers menu is where you can manage customer accounts, groups and segments, invitations to events, gift registries, gift cards, and rewards. You can even see which customers are online at the moment.

## Promotions

The Promotions menu is where you set up catalog and shopping cart price rules, coupons, promotional banners, and automated email reminder rules. Rules trigger actions when conditions are met.

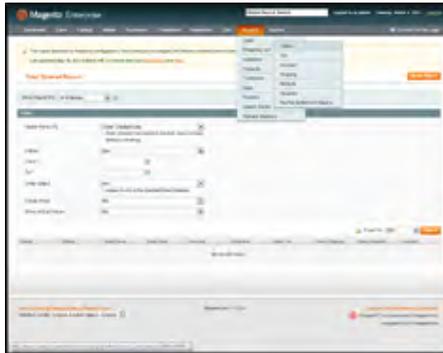
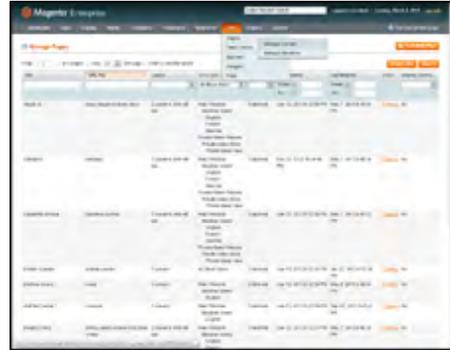


## Newsletter

The Newsletter menu contains the tools you need to publish newsletters and manage your list of subscribers.

## CMS

The CMS menu is where you create and manage content for your store. You can even create a hierarchy of pages with version control and navigation. Other types of content you can create include static blocks, banners, “widgets,” and polls.

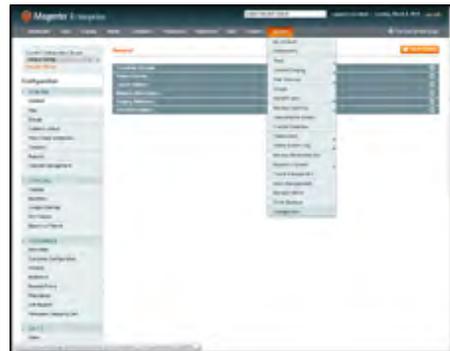


## Reports

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

## System

The System menu includes tools to configure and maintain every aspect of your store. In addition, you can install extensions and manage Web Services for integration with other applications.



## Admin Tools

The Admin includes many lists of data for products, orders, customers, search terms, pages, blocks, banners, and so on. Each list has the same set of tools for finding records, pagination, sorting, filtering, selecting, and applying actions to records.

### Global Search

---

The Global Search box can be used to find any value in the database, including product, customer, and order records.

### Sorting

---

The header of each column can be used to sort the list in ascending or descending order.

### Filters

---

The filters in the header of each column can be used to limit the list to specific values. Some filters have additional options that can be selected from a list box, and for others, you can simply type the value you want to find.

### Pagination

---

The pagination controls are used to view the additional pages of results.

### Selection

---

The Selection controls above the column headers have links to Select All, Unselect All, Select Visible, and Unselect Visible

### Actions

---

The Action control applies an operation to any record with a checkmark in the first column.

## Global Record Search

The global search box is located in the Admin header, and can be used to find any record in the database. The results can include customers, products, orders, or any related attribute.

The screenshot shows the Magento Enterprise Admin interface with a search for 'camisole'. The search results are displayed in a table with columns for Name, Type, Attrib. Set Name, SKU, Price, and Status. The search results include items like 'Black Nolita Cami-Black-S', 'Black Nolita Cami-Black-XS', 'NoLita Cami-Pink-L', 'Black Nolita Cami', 'Elita Flat', 'Broadway Pump', 'Annie Pump', 'Plaza Platform', 'Prima Pump', and 'Hudson Sneakeastin Pump'.

From:	To:	Name	Type	Attrib. Set Name	SKU	Price	Status	Web Sites	Action
Any		881 Black Nolita Cami-Black-S	Simple Product	Clothing	wb002c-Black-S		Not Visible Individually	Enabled	Main Website
		880 Black Nolita Cami-Black-XS	Simple Product	Clothing	wb002c-Black-XS		Not Visible Individually	Enabled	Main Website
		879 NoLita Cami-Pink-L	Simple Product	Clothing	wb002c-Pink-L		Not Visible Individually	Enabled	Main Website
		878 Black Nolita Cami	Simple Product	Clothing	wb002M	\$150.00	25 Not Visible Individually	Enabled	Main Website
		877 Black Nolita Cami	Configurable Product	Clothing	wb002c	\$150.00	0 Catalog Search	Enabled	Main Website
		875 Elita Flat	Configurable Product	Shoes	shw005	\$250.00	0 Catalog Search	Enabled	Main Website, Private Sales Website
		874 Broadway Pump	Configurable Product	Shoes	shw004	\$410.00	0 Catalog Search	Enabled	Main Website, Private Sales Website
		873 Annie Pump	Configurable Product	Shoes	shw003	\$380.00	0 Catalog Search	Enabled	Private Sales Website
		872 Plaza Platform	Configurable Product	Shoes	shw002	\$320.00	0 Catalog Search	Enabled	Private Sales Website
		871 Prima Pump	Configurable Product	Shoes	shw001	\$375.00	0 Catalog Search	Enabled	Private Sales Website
		870 Hudson Sneakeastin Pump	Configurable Product	Shoes	shw000	\$375.00	0 Catalog Search	Enabled	Private Sales Website

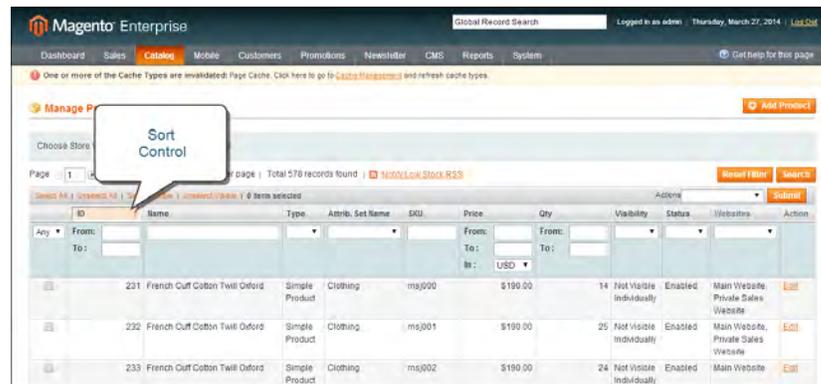
*Global Record Search*

### To search records globally:

1. Type the first few letters of what you are looking for into the global search box.
2. In the list of closely matching items, click the one that you want to find.

## List Controls

Many pages in the Admin have a list of records that is displayed in a grid, with controls at the top of each column. The controls can be used to sort the list in ascending, or descending order, based on the values in the column. In addition, you can enter a value at the top of the column to filter the list.



*Sort Controls*

### To sort a list:

1. In the upper-left corner, set **Choose the Store View** to the define the scope of the data to be retrieved.
2. Click the column name of any header. The arrow indicates the current order as either ascending or descending.
3. Use the pagination controls to view additional pages in the collection.

### To set the pagination controls:

1. Set **View** to the number of records that you want to view per page.
2. In the **Page** box, enter the page number you want to view, or click the arrow button to advance to the next or previous, page.

Global Record Search | Logged in as admin | Thursday, March 27, 2014 | Logout

Dashboard | Sales | **Catalog** | Mobile | Customers | Promotions | Newsletter | CMS | Reports | System | Get help for this page

One or more of the Cache Types are invalidated. Page Cache. Click here to go to [Cache Management](#) and refresh cache types.

Manage Products | Add Product

Choose Store View: All Store Views

Page 1 of 29 pages | View 20 per page | Total 576 records found | [New/Low Stock RSS](#) | [Reset Filter](#) | [Search](#)

Search All | [View All](#) | [Viewable](#) | [Lowest Price](#) | 0 items selected | Actions | [Submit](#)

ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Websites	Action
231	French Cuff Cotton Twill Oxford	Simple Product	Clothing	msj000	\$190.00	14	Not Visible Individually	Enabled	Main Website, Private Sales Website	<a href="#">Edit</a>
232	French Cuff Cotton Twill Oxford	Simple Product	Clothing	msj001	\$190.00	25	Not Visible Individually	Enabled	Main Website, Private Sales Website	<a href="#">Edit</a>
233	French Cuff Cotton Twill Oxford	Simple Product	Clothing	msj002	\$190.00	24	Not Visible Individually	Enabled	Main Website	<a href="#">Edit</a>

*Pagination Controls*

### To filter the data:

1. In the box below the column header, either enter or select the value you want to find.
2. Click the **Search** button.

Global Record Search | Logged in as admin | Thursday, March 27, 2014 | Logout

Dashboard | Sales | **Catalog** | Mobile | Customers | Promotions | Newsletter | CMS | Reports | System | Get help for this page

One or more of the Cache Types are invalidated. Page Cache. Click here to go to [Cache Management](#) and refresh cache types.

Manage Products | Add Product

Choose Store View: All Store Views

Page 1 of 1 pages | View 20 per page | Total 12 records found | [Reset Filter](#) | [Search](#)

Search All | [View All](#) | [Viewable](#) | [Lowest Price](#) | 0 items selected | Actions | [Submit](#)

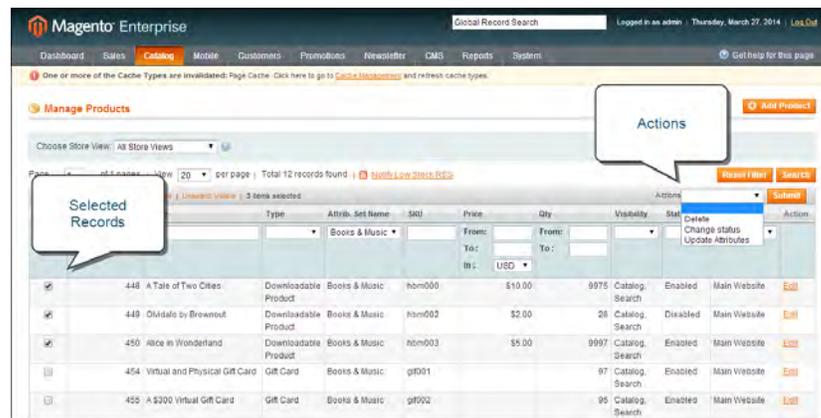
ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Websites	Action
448	A Tale of Two Cities	Downloadable Product	Books & Music	hsm000	\$10.00	9975	Catalog Search	Enabled	Main Website	<a href="#">Edit</a>
449	Ovidio by Brownout	Downloadable Product	Books & Music	hsm002	\$2.00	28	Catalog Search	Disabled	Main Website	<a href="#">Edit</a>
450	Alice in Wonderland	Downloadable Product	Books & Music	hsm003	\$5.00	9997	Catalog Search	Enabled	Main Website	<a href="#">Edit</a>

*Filter Controls*

## Actions Control

When working with lists of data, you can use the Actions control to apply an operation to a single record, or to multiple records. The Actions control lists the operations that can be applied to the selected records. For example, while working in the Manage Products list, you can select multiple products, and use the Actions control to change their status from “Disabled” to “Enabled,” update attributes, or delete them from the database.

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



*Applying an Action to Selected Records*

### Step 1: Select Records

The checkbox in the first column identifies each record that is a target for the action. The search filters can be used to narrow the list to the records you want to target for the action. Do the following:

1. Select the checkbox of each record that is targeted for the action. Or, use the selection links above the list to the left, to select groups of records. Options include:
  - Select All / Unselect All
  - Select Visible / Unselect Visible
2. If needed, set the search filters at the top of the columns to list the records you want to include.
3. In the first column, set the checkbox state to list “Any” record, or only those that match, or do not match the filter settings.

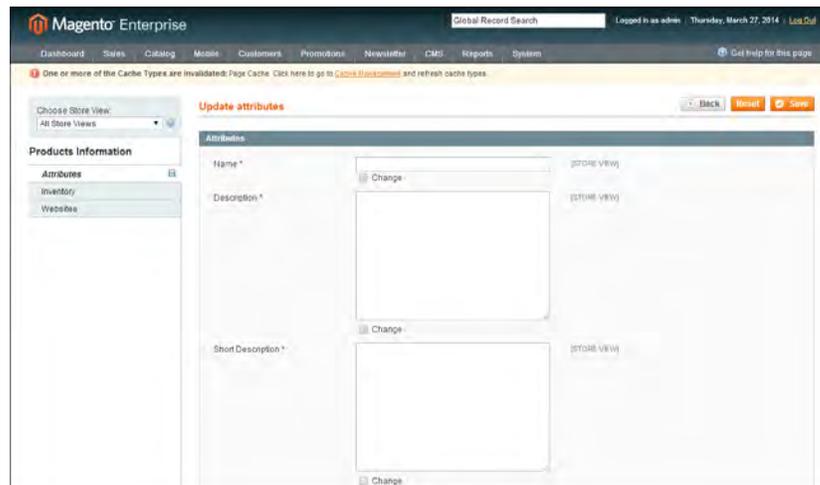
## Step 2: Apply an Action to Selected Records

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

### Example: Update Attributes

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

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



*Update Attributes*

3. Select the **Change** checkbox next to each attribute, and make the necessary changes.
4. Click the **Save** button to update the attributes for the group of selected records.
5. Click the **Submit** button.

### Checkbox States

STATE	DESCRIPTION
Any	Lists all records, regardless of checkbox status.
Yes	Lists only records with the checkbox selected.
No	Lists only records without the checkbox selected.

**Actions by List**

LIST	ACTIONS
<b>Sales</b>	
Orders	Cancel Hold Unhold Print Invoices Print Packingslips Print Credit Memos Print All Print Shipping Labels Move to Archive
Shipments	PDF Packing Slips Print Shipping Labels
Invoices	PDF Invoices
Manage RMA	Close
Search Terms	Delete
Credit Memos	PDF Credit Memos
Manage Gift Wrapping	Delete Change Status
<b>Catalog</b>	
Manage Products	Delete Change Status Update Attributes
Search Terms	Delete
Manage Tags	Delete Change Status
Reviews (All / Pending)	Delete Update Status
Tags (All / Pending)	Delete Change Status

LIST	ACTIONS
<b>Mobile</b>	
Message Queue	Delete Cancel
<b>Customers</b>	
Manage Customers	Delete Subscribe to Newsletter Unsubscribe from Newsletter Assign a Customer Group
Manage Invitations	Discard Selected Send Selected
Manage Gift Card Accounts	Delete
<b>Newsletter</b>	
Newsletter Subscribers	Unsubscribe Delete
<b>CMS</b>	
Manage Banners	Delete



## Chapter 5:

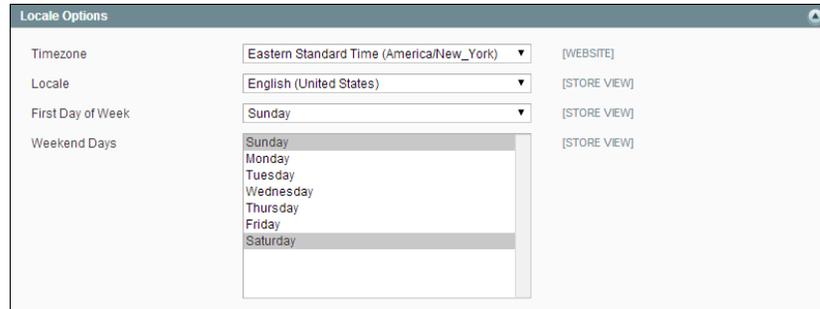
# Store Information

The basic information for your store includes the store name and address, telephone number and email address, that appear on email messages, invoices, and other communications sent to your customers. In this chapter , you will configure the following information:

- [Store Locale](#)
- [Countries Options](#)
- [State Options](#)
- [Shipping Settings](#)
- [Store Email Addresses](#)
- [Contact Us](#)

## Locale Options

The locale determines the language, country, tax rate, and other settings used throughout a store. The locale options configure the time zone and language of each store, and identify the days of your work week in the area.



*Locale Options*

### To set the locale of a store:

1. On the Admin menu, select **System > Configuration**.
2. Click to expand the **Locale Options** section.
3. Select your **Timezone** from the list. Then, do the following:
  - a. Set **Locale** to the store language.
  - b. Set **First Day of the Week** to the day that is considered to be the first day of the week in your area.
  - c. In the **Weekend Days** list, select the days which fall on a weekend in your area. (To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.)
4. When complete, click the **Save Config** button.

## Field Descriptions

FIELD	SCOPE	DESCRIPTION
Timezone	Website	Identifies the time zone of the primary market served by the store. Usually the timezone is the same as that used in the physical location of your business.
Locale	Store View	Identifies the language, currency, and system of measurement used in the market served.
First Day of Week	Store View	Identifies the day that is considered to be the first day of the week in the market served.
Weekend Days	Store View	Identifies the days that fall on the weekend in the market served.

## State Options

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

Because standard address formats vary from one country to another, you can also edit the address template that determines how the information appears on invoices, packing slips, and shipping labels.



*States Options*

### To set up the state options:

1. On the Admin menu, select **System > Configuration**.
2. Click to expand the **States Options** section, and do the following:
3. In the **State is required for** list, select each country where you want State / Province to be a required entry. To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.
4. Set **Display not required State** to one of the following:
 

Yes	In countries where the state field is not required, the field is included in the form as an optional entry.
No	In countries where the state field is not required, the field is omitted from the form.
5. When complete, click the **Save Config** button.

## Field Descriptions

FIELD	SCOPE	DESCRIPTION
State is required for	Global	Identifies the countries where you conduct business that do not require a state or province to be included in a postal address.
Display not required State	Global	<p>For countries where it is not required, determines if the State/Province field is included in the postal address of the customer. Options include:</p> <p>Yes      Includes the State/Province field in the customer address, even if not required by the country.</p> <p>No        Omits the State/Province field from the customer address if not required by the country.</p>

## Countries Options

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

*Countries Options*

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

1. From the Admin menu, select **System > Configuration**.
2. Click to expand the **Countries Options** section. Then, do the following:
  - a. Set **Default Country** to the country where your business is located.
  - b. In the **Allow Countries** list, select each country from which you accept orders. By default, all countries in the list are selected. To select multiple countries, hold down the Ctrl (PC) or Command (Mac) key.
  - c. In the **Postal Code is Optional** list, select each country where you conduct business that does not require a ZIP or postal code to be included as part of the street address.
  - d. In the **European Union Countries** list, select each country in the EU where you conduct business. By default, all EU countries are selected.
3. When complete, click the **Save Config** button.

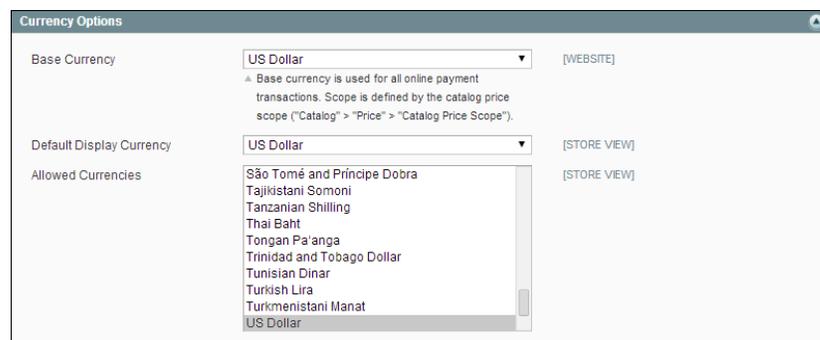
## Field Descriptions

FIELD	SCOPE	DESCRIPTION
Default Country	Store View	Identifies the country where your store is located.
Allow Countries	Store View	Identifies each country from which you accept orders.
Postal Code is Optional for the following countries	Global	Identifies the countries that do not require a ZIP or postal code in the shipping address.
European Union Countries	Global	Identifies the countries that are members of the European Union.

## Currency Setup

Magento Enterprise gives you the ability to accept currencies that are used in more than two hundred countries around the world. In addition to choosing the currencies that you accept, you can also manage currency rates for the store. If you accept payment in multiple currencies, make sure to monitor the currency rate settings, because any fluctuation can affect your profit margin. Currency rates can be set manually, or imported into the store. Currency symbols are used throughout the store, and appear in product prices and sales documents such as orders and invoices.

Before you can set currency rates, you must first specify the currencies that you accept, and which currency is used to display prices in your store. You can customize the currency symbols as needed, and also set the price display separately for each store or view.



*Currency Options*

### To set up currency for your store:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Currency Setup**.

3. Click to expand the **Currency Options** section, and do the following:
  - a. Set **Base Currency** to the primary currency that you use for online transactions.
  - b. Set **Default Display Currency** to the currency that you use to display pricing in your store.
  - c. In the **Allowed Currencies** list, select all currencies that you accept as payment in your store. (To select multiple currencies, hold down the Ctrl key and click each option.)
4. When complete, click the **Save Config** button.

### To update currency rates:

1. On the Admin menu, select **System > Manage Currency > Rates**.

The Manage Currency Rates page displays the rates of the currency you accept in relation to your base currency rate.



*Manage Currency Rates*

2. Do one of the following:
  - To manually update a currency rate, click the rate you want to change, and type the new value.
  - To import the latest currency rates, set **Import Service** to the service you want to use. “Webservices” is the default currency rate service. Then, click the **Import** button.

The rate is updated with the value from the import, with the old rate referenced below.

3. When complete, click the **Save Currency Rates** button.

### To customize currency symbols:

1. On the Admin menu, select **System > Manage Currency > Symbols**.

Each enabled currency for your store appears in the list.



*Manage Currency Symbols*

2. Enter a custom symbol for each currency you want to use, or select the **Use Standard** checkbox to the right of each currency.
3. When complete, click the **Save Currency Symbols** button.

It is not possible to change the alignment of the currency symbol from left to right.

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Base Currency	Website	The primary currency used in store transactions.
Default Display Currency	Store View	The primary currency used to display prices.
Allowed Currencies	Store View	The currencies accepted by your store for payment.

## Shipping Settings

The Shipping Settings establish the point of origin for all shipments made from your store or warehouse, and your preference for managing orders that are shipped to multiple addresses. The point of origin determines the tax rate that is used for products sold from the store.

Origin		
Country	United States	[WEBSITE]
Region/State	California	[WEBSITE]
ZIP/Postal Code	90232	[WEBSITE]
City	Culver City	[WEBSITE]
Street Address	10441 Jefferson Blvd., Suite 200	[WEBSITE]
Street Address Line 2		[WEBSITE]

*Shipping Origin*

### To establish the point of origin:

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under Sales, select **Shipping Settings**.
3. If applicable, set **Current Configuration Scope** to the store where the configuration applies.
4. Click to expand the **Origin** section.
5. Complete the fields for each part of your point-of-origin address. If you need more room for the street address, use both address lines.
6. When complete, click the **Save Config** button.

### Field Descriptions

FIELD	SCOPE	DESCRIPTION
Country	Website	The point-of-origin country.
Region/State	Website	The point-of-origin region or state.
ZIP/Postal Code	Website	The point-of-origin ZIP or postal code.
City	Website	The point-of-origin city.
Street Address	Website	The point-of-origin street address.
Street Address Line 2	Website	An additional line for the point-of-origin street address, if needed.

## To configure shipments to multiple addresses:

1. On the Shipping Settings page, click to expand the **Options** section. Then, do the following:

*Shipping Options*

- a. To allow items from a single order to be shipping to multiple addresses, set **Allow Shipping to Multiple Addresses** to “Yes.”
  - b. To limit the quantity of a single item that can be shipping to multiple addresses, enter the number in the **Maximum Qty Allowed for Shipping to Multiple Addresses** field.
2. When complete, click the **Save Config** button.

### Field Descriptions

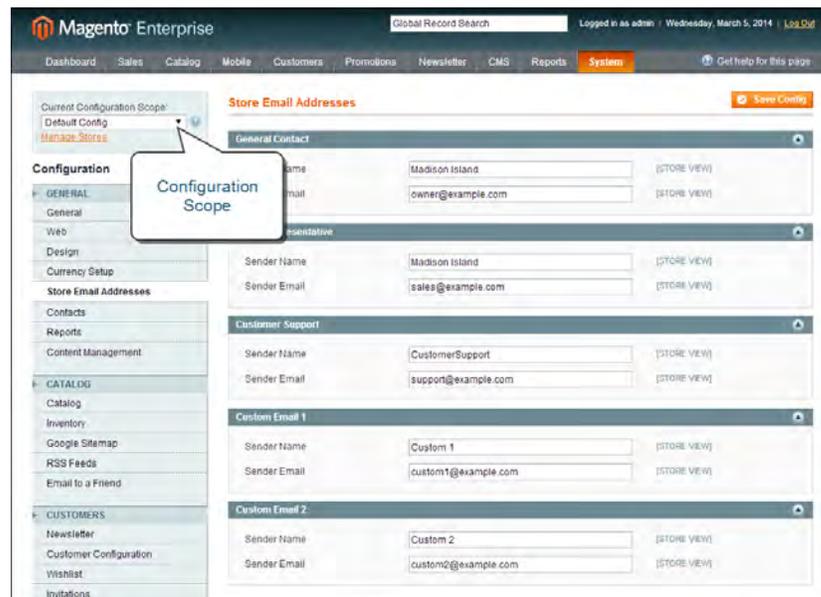
FIELD	SCOPE	DESCRIPTION
Allow Shipping to Multiple Addresses	Website	Determines if you allow single orders to be shipping to multiple addresses. Options include: Yes / No
Maximum Qty Allowed for Shipping to Multiple Addresses	Website	Sets a limit for the number of units of a product that can be shipping to multiple addresses.

## Store Email Addresses

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

- General Contact
- Sales Representative
- Customer Support

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



*Store Email Addresses*

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

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

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

1. On the Admin menu, select **System > Configuration**.
2. In the Configuration panel on the left, under General, select **Store Email Addresses**. Then, do the following:

- a. Click to expand the **General Contact** section.
- b. If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to identify the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.

General Contact		
Sender Name	<input type="text" value="Madison Island"/>	<input checked="" type="checkbox"/> Use Website [STORE VIEW]
Sender Email	<input type="text" value="owner@example.com"/>	<input checked="" type="checkbox"/> Use Website [STORE VIEW]

*General Contact*

- c. In the **Sender Name** field, type the name of the person that you to appear as the sender of all email messages that are associated with the General Contact.
  - d. In the **Sender Email** field, type the associated email address.
3. Repeat this process for any other email addresses that you plan to use.
  4. When complete, click the **Save Config** button.

### Step 3: Update the Sales Email Configuration as Needed

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

1. In the Configuration panel on the left, under Sales, select **Sales Email**.
2. Click to expand each section, and make sure that the correct store email is selected as the sender of the message.
3. When complete, click the **Save Config** button.

## Contact Us

The Contact Us link in the footer of each page is an easy way for customers to keep in touch with you. The form is enabled by default, and can be configured to send inquiries to a specific email address and replies from a specific store identity.

The screenshot shows the 'CONTACT US' form on the Madison Island website. The form is titled 'CONTACT US' and includes the following fields:
 

- Name:** A text input field with a red asterisk and the label 'Required Fields' above it.
- Email:** A text input field with a red asterisk above it.
- Telephone:** A text input field.
- Comment:** A large text area with a red asterisk above it.

 A blue 'SUBMIT' button is located at the bottom left of the form. The website header includes 'WELCOME', 'LANGUAGE', 'MY ACCOUNT', 'MY CART', and 'CHECKOUT'.

*Contact Us*

### To configure the Contact Us form:

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, under General, click **Contacts**.
3. Click to expand the **Email Options** section. Then, do the following:

The screenshot shows the 'Email Options' configuration panel. It contains three rows of configuration options:
 

Email Options		
Send Emails To	<input type="text" value="hello@example.com"/>	[STORE VIEW]
Email Sender	<input type="text" value="Custom Email 2"/>	[STORE VIEW]
Email Template	<input type="text" value="Contact Form (Default Template from Locale)"/>	[STORE VIEW]

*Email Options*

- a. In the **Send Emails To** field, enter the email address where the form information is to be sent.
  - b. Set **Email Sender** to the store identity you want to use for any replies sent in response to inquiries you receive.
  - c. Select the **Email Template** used to format the data sent from the form.
4. When complete, click the **Save Config** button.



## Chapter 6:

# Websites, Stores & Views

When Magento is installed, a main website, default store, and default store view are created. You can create additional websites, stores, and store views, according to your needs. For example, in addition to your main website, you might have a secondary website for private sales, and another to be used as a staging site. Each website can have its own domain. Then within each website, you can have multiple stores, and within each store, separate views.

## Websites

---

Suppose you want to sell machine shop equipment online, and your spouse wants to sell handmade baskets. It is unlikely that you would sell both of these product lines in a single store. However, in a single Magento installation, you can do both by setting up separate websites. Each website can have its own domain name. The websites can be set up to share customer data, or to have entirely separate sets of customer data.

## Stores

---

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

## Store Views

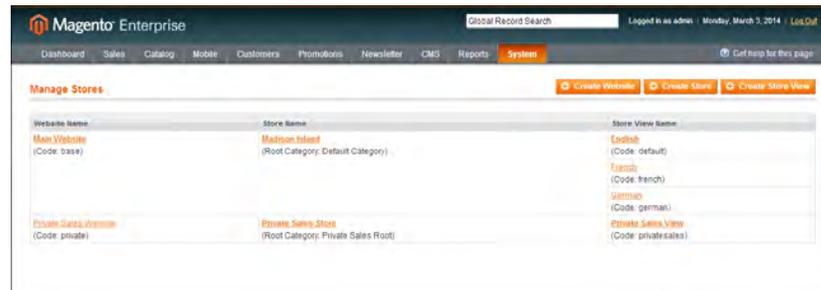
---

Your market research indicates that about half of your potential customer base speaks English, and the other half speaks Spanish. Within each store, you can create separate store views, one for each language. The store views share the same catalog, but each is presented in its respective language. Customers can switch from one store view to another using the “language chooser” in the header of the store.

## Setting Up Store Hierarchy

Before you begin, carefully plan your store hierarchy in advance because it is referred to throughout the configuration. Each store can have a separate root category, which makes it possible to have an entirely different set of navigation for each store.

To have a separate domain for each website, you must modify the configuration files on the server. To learn more, see: [Tutorial: Multi-Site, Multi-Domain Setup](#).



*Manage Stores*

### To set up a new website:

1. On the Admin menu, select **System > Manage Stores**.
2. From Manage Stores, click the **Create Website** button. Then, do the following:

*Website Information*

- a. Enter the **Name** of the website. The name is for internal reference, and can refer to the domain of the site or anything else distinguish it from other sites in the hierarchy. For example: Private Sales.
  - b. Enter a **Code** in lowercase characters that will be used on the server to point to the domain. For example: private.
  - c. (Optional) Enter a **Sort Order** number to determine the sequence in which this site is listed with other sites. Enter a zero to make this site appear at the top of the list.
  - d. (Optional) Set **Default Store** to the name of the primary store that is associated with this website.
  - e. (Optional) To make this website the default for your hierarchy, select the **Set as Default** checkbox.
3. When complete, click the **Save Website** button.

### To set up a new store:

1. Before you begin, set up the root category that will be used for this store.
2. On the Admin menu, select **System > Manage Stores**.
3. From Manage Stores, click the **Create Store** button. Then, do the following:

*New Store*

- a. Set **Website** to the site that is the parent of this store.
  - b. Enter a **Name** for the store. The name is for internal reference to distinguish it from other stores in the hierarchy. For example: Private Sales Store.
  - c. Set **Root Category** to the root category that will be used for the main navigation of the store. The root category can be the same as used for other stores, or unique to this store. For example: Private Sales Root.
  - d. (Optional) Set **Default Store View** to the view that you want to appear when someone visits the store. All other views are selected from the chooser in the header. For example: English Private Sales View.
4. When complete, click **Save Store**.

### To set up a new store view:

1. On the Admin menu, select **System > Manage Stores**.
2. From Manage Stores, click the **Create Store View** button. Then, do the following:

*Store View Information*

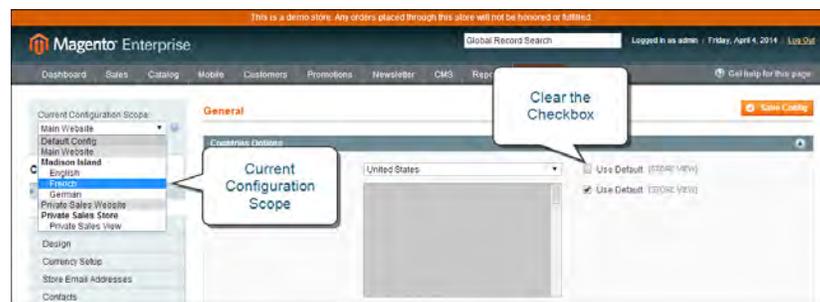
- a. Set **Store** to the parent store of this view.
- b. Enter a **Name** for this store view. The name appears in the “language chooser” in the header of the store. For example: French.
- c. Enter a **Code** in lowercase characters to identify the view. For example: privatesales.fr.

- d. To activate the view, set **Status** to “Enabled.”
  - e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.
3. When complete, click the **Save Store View** button.

## Configuration Scope

If your Magento installation has multiple websites, stores, or views, you can set the scope of a configuration parameter to apply to a specific part of your installation. The Current Configuration Scope box in the upper-left corner of the Admin workspace determines the scope of the current settings. By default, the configuration scope is set to “Default Config.” For Admin users with restricted access, the list includes only the areas where the user is granted permission to access.

The configuration scope applies to products categories, attributes, customer management setting, and so on. The scope of each item appears in brackets after the field to indicate the range of the setting.



*Current Configuration Scope*

If your installation includes multiple websites, stores or views, you should always set the scope to identify where you want the settings to apply. The possible settings are: [STORE], [WEBSITE], and [GLOBAL].

Any item with the scope of [STORE] can be set differently for each view. For example, because the scope of a product name and description is [STORE], the fields can have a different value for each language. However, some configuration settings—such as postal code—are [GLOBAL] because the same setting applies throughout the system. The [WEBSITE] scope also applies to the entire site, including all views.

### To set the configuration scope:

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

1. On the Admin menu, select **System > Configuration**.
2. In the panel on the left, select the page with the configuration settings you want to change. If necessary, click to expand the section to be configured. Then, do the following:
  - a. In the upper-left corner of a configuration page, set **Current Configuration Scope** to the website, store, or view where the configuration applies.  
  
A checkbox appears after each field, and sometimes additional fields become available.
  - b. Clear the **Use Default** checkbox that is after the field that you want to edit. Then, enter the new value.
  - c. Repeat this process for every field that needs to be updated on the page.
3. When complete, click the **Save Config** button.

### Scope Settings

SCOPE	DESCRIPTION
Store	The setting is limited to the store view, which is often used to display a store in multiple languages.
Website	The setting is limited to the website.
Global	The setting applies to the entire installation.





## Chapter 7:

# Industry Compliance

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

Topics in this chapter include:

- [PCI Compliance](#)
- [Privacy Policy](#)
- [Cookie Law](#)

You will learn about PCI compliance, and the importance of establishing procedures to protect payment information. You will also learn how to bring your store into compliance with the Cookie Law, which is a requirement in some countries, and considered a “best practice” in others. In addition, you will learn how to customize and maintain a privacy policy for your store.

## PCI Compliance Guidelines

The Payment Card Industry (PCI) has established a set of requirements for businesses that accept payment by credit card over the Internet. In addition to the need to maintain a secure hosting environment, there are additional requirements that merchants must meet to ensure the privacy of cardholder data. Every merchant who handles customer credit card information is required by the Payment Card Industry to conduct business within the following guidelines:

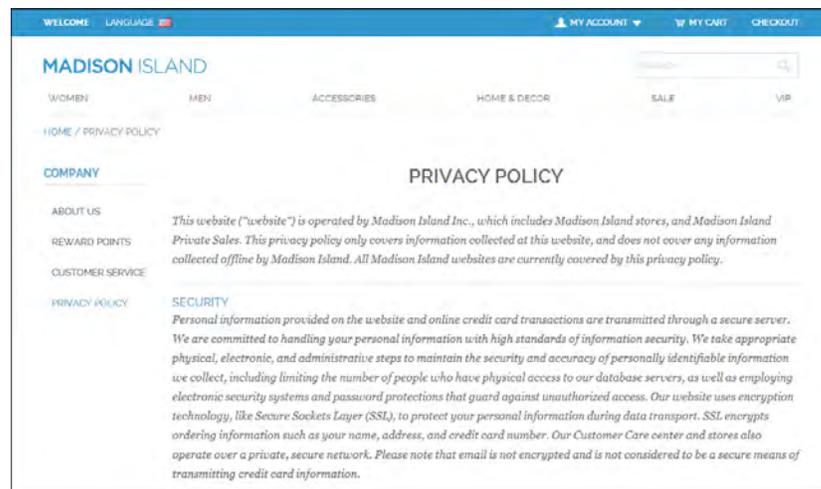
### PCI REQUIREMENTS

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

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

## Privacy Policy

Your store includes a sample privacy policy that must be updated with your own information. Your privacy policy should describe the type of information that your company collects, and how it is used. It should also list the filenames of cookies that are placed on the computers of people who visit your store. Any additional cookies that are associated with third-party extensions and add-ons should be included in the list. For a complete list of the cookies used by Magento, see [Cookie Restriction Mode](#).



*Privacy Policy*

### To edit your privacy policy:

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. Find the privacy policy in the list, and click to open the page.
3. In the panel on the left, click **Content**.
4. To work in WYSIWYG mode, click the **Show/Hide Editor** button.
5. Make the necessary changes to the content.
6. When complete, click the **Save Page** button.

# Cookie Law Compliance

Cookies are small files that are saved to the computer of each visitor to your site, and used as temporary holding places for information. Information that is saved in cookies is used to personalize the shopping experience, link visitors to their shopping carts, measure traffic patterns, and improve the effectiveness of promotions.

To keep pace with legislation in many countries regarding the use of cookies, Magento offers merchants a choice of methods for obtaining customer consent.

## Implied Consent

---

Using cookies with implied consent is the method that is currently the most widely adopted in the UK. Implied consent means that visitors to your store have a clear understanding that cookies are a necessary part of operations, and by using your site, have indirectly granted permission to use them.

The key to gaining implied consent is to provide enough information for a visitor to make an informed decision. Many stores display a message at the top of all standard pages that provides a brief overview of how cookies are used, with a link to the store's privacy policy. The privacy policy should describe the type of information that your store collects, and how it is used.

## Expressed Consent

---

Operating your store in “[cookie restriction mode](#)” requires visitors to express their consent before any cookies can be saved to their computers. Unless consent is granted, many features of your store will be unavailable.

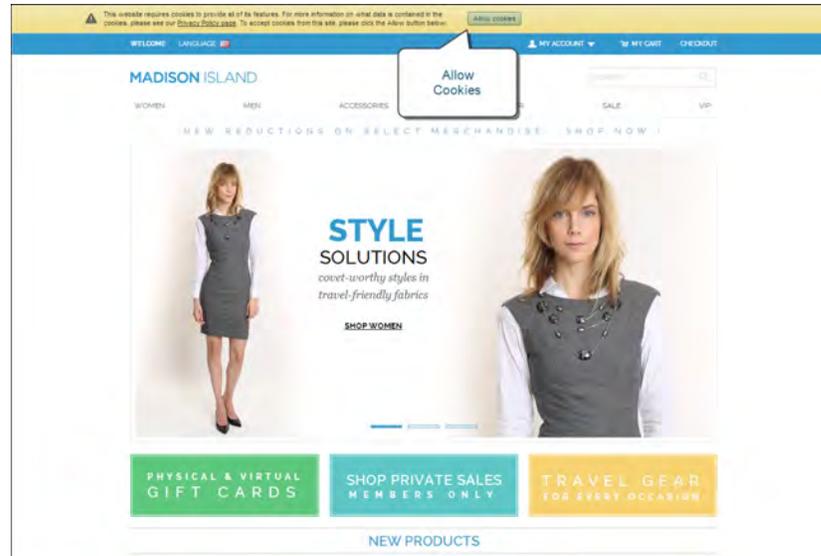
## Cookie Restriction Mode

Operating your store in “Cookie Restriction Mode” requires that visitors express their consent before cookies can be saved to their computers. Unless consent is granted, many features of your store become unavailable.

If Google Analytics is available for your store, it can be invoked only after the visitor has granted permission to use cookies. For more information, see Google's [cookie usage](#) documentation.

When Cookie Restriction Mode is enabled, visitors to your store are notified that cookies are required for full-featured operations. They are then referred to your privacy policy for more information, and encouraged to grant consent by clicking the Allow button. The message disappears after the visitor click the Allow button. The Cookie Restriction Mode message resides in a CMS static block, and can be edited to suit your voice and style.

Your privacy policy should include the name of your store and contact information, and explain the purpose of each cookie that is used by your store. See the end of this topic for a complete list of the cookies used.



*Cookie Restriction Notice*

## Step 1: Enable Cookie Restriction Mode

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, click **Web**.
2. Click to expand the **Session Cookie Management** section, and do the following:

*Cookie Session Management*

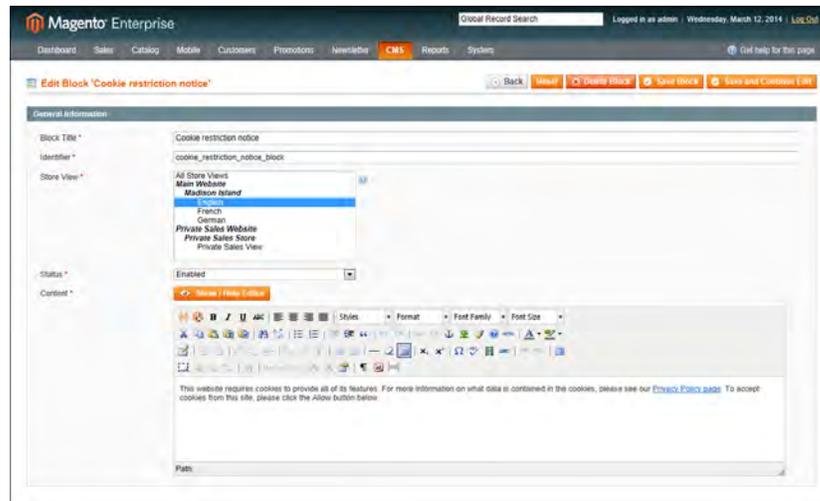
- a. Enter the **Cookie Lifetime** in seconds.
- b. If you want to make cookies available to other folders, enter the **Cookie Path**. To make the cookies available anywhere in the site, enter a forward slash.
- c. To make the cookies available to a subdomain, enter the subdomain name in the **Cookie Domain** field. (subdomain.yourdomain.com) To make cookies available to all subdomains, enter the domain name preceded by a period. (.yourdomain.com)
- d. To prevent scripting languages such as JavaScript from gaining access to cookies, set **Use HTTP Only** to “Yes.”
- e. Set **Cookie Restriction Mode** to “Yes.”

**Important!** If you disable cookies, you should also disable Full-Page Caching to ensure that no customer-related information is saved.

3. When complete, click the **Save Config** button.

## Step 2: Edit the Cookie Restriction Message

1. On the Admin menu, select **CMS > Static Blocks**.
2. Find the **Cookie Restriction Notice**, and click to open the block. Then, do the following:



*Editing the Cookie Restriction Notice*

- a. Select each **Store View** where the notice should appear.
  - b. Set **Status** to “Enabled.”
  - c. In the **Content** box, edit the message as needed.
3. When complete, click the **Save Block** button.

## Step 3: Update Your Privacy Policy

1. On the Admin menu, select **CMS > Pages > Manage Content**.
2. Find your **Privacy Policy** in the list, and click to open the page.
3. In the panel on the left, click **Content**. If necessary, click the **Show/Hide Editor** button to work in WYSIWYG mode.
4. Update your privacy policy to describe the information that your company collects, and how it is used. You can include the information from the tables at the end of this topic.
5. When complete, click the **Save Page** button.

## Field Descriptions

FIELD	DESCRIPTION
Cookie Lifetime	Determines when the browser can delete Magento cookies. The default value is 3600, which means that cookies remain in the browser for one hour. To ensure that cookies expire at the end of a browser session, set the lifetime to zero.
Cookie Path	Allows you to make Magento cookies available other folders. If you want to make cookies available anywhere in a site, you should set this value to a single forward slash.
Cookie Domain	Determines if cookies are visible to subdomains. (http://subdomain.domain.com) To ensure that your cookies are available to all subdomains, enter your domain name with a prefix of a period. (.domain.com)
USE HTTP Only	Makes the cookie available only through HTTP protocol, and unavailable to JavaScript or other scripting languages.

## Cookie Reference

### Magento Standard Cookie

COOKIE NAME	COOKIE DESCRIPTION
USER_ALLOWED_SAVE_COOKIE	Indicates if a customer is allowed to use cookies.
external_no_cache	A flag that indicates if caching is disabled.
persistent_shopping_cart	The session key.
Stf	If product links were sent to friends, stores the timestamps in the format: \$timestamp1, \$timestamp2, ..., \$timestampN
pollN	A poll ID that indicates if a vote has occurred.
frontend	Session ID
guest-view	Allows guests to edit their orders.

### Magento Cookies Used with Full Page Cache

COOKIE NAME	COOKIE DESCRIPTION
CUSTOMER	Hashed value of a customer ID in the format: customer_ \$customerId
CUSTOMER_INFO	Hashed value of a customer group ID in the format: customer_group_ \$customerGroupId
NEWMESSAGE	Indicates if a new message has been received.
CART	Hashed value of a quote ID in the format: \$quoteId
COMPARE	The product IDs added to product compare in the format: \$productId 1, \$productId 2, ..., productId N
POLL	The ID of a recently-voted poll.
RECENTLYCOMPARED	The product IDs of recently compared products in the format: \$productId 1, \$productId 2, ..., productId N
WISHLIST	A hashed list of products added to Wishlist in the format: \$productId 1_ \$productId 2_ ..., _productId N
WISHLIST_CNT	A hashed number of items in the customer's Wishlist in the format: wishlist_item_count_ \$productCount

COOKIE NAME	COOKIE DESCRIPTION
CUSTOMER_AUTH	Indicates if a customer is logged in. A hashed value in the format: <code>customer_logged_in_0 1</code>
CATEGORY_INFO	Stores category information so pages can load more quickly.
LAST_CATEGORY	Recently visited category ID in the format: <code>\$categoryID</code>
VIEWED_PRODUCT_IDS	Recently viewed product IDs in the format: <code>\$productId 1, \$productId 2, ..., productId N</code>
currency	The code for the currency selected by a customer ('USD', 'UAH', 'GBP', etc.)
store	The store view code.
NO_CACHE	Indicates if the cache is allowed to be used.
LAST_PRODUCT	The product ID of the last product viewed.

### Google Analytics Cookies

COOKIE	DESCRIPTION
_utma	Distinguishes users and sessions.
_utmb	Determines new sessions/visits.
_utmc	Determines if the user was in a new session/visit.
_utmz	Stores the traffic source or campaign that explains how the user reached your site.





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