

# Magelia WebStore QuickStart Guide

## Version 1.0 - December 12

Based on Magelia WebStore version 2.2



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# 2. Limitation of Liability

Business laws, as well as calculation rules for purchases, rounding, and taxes, are constantly evolving throughout the entire world. Magelia WebStore is a generic and international e-commerce software that was not designed for any country in particular.

When configuring the software, we ask that you apply the laws in force and ensure that the calculations made by the software meet your needs and comply with the legal, accounting, and tax requirements in force in the countries where your company operates. In certain cases, it may be necessary to modify the software's source code in order to make it compatible with the laws enforced in your country.

Under no circumstances and under no legal theory, whether in tort (including negligence), contract, or otherwise, shall the Licensor be liable to anyone for any indirect, special, incidental, or consequential damages of any character arising as a result of this License or the use of the Original Work including, without limitation, damages for loss of goodwill, work stoppage, computer failure or malfunction, or any and all other commercial damages or losses. This limitation of liability shall not apply to the extent applicable law prohibits such limitation.

# 3. Introduction

The purpose of this walkthrough is to allow you to configure step-by-step your Magelia WebStore online store. It is suitable for all editions of Magelia WebStore: Community, Professional, and Enterprise.

In what follows, we assume that Magelia WebStore is already installed and that you are beginning from the welcome screen of the administration console. If this is not the case, please install Magelia WebStore first.

The walkthrough begins as though nothing has been configured within Magelia WebStore and that you did not install the proposed configurations during installation.

#### What if I installed a pre-configured store?

- If you selected the US Demo, Europe Demo, or Professional/Enterprise Demo, then the main data has already been pre-configured. We suggest you in this case to go through the Configuration Walkthrough in the order that follows and to simply make the modifications in order to adapt the configuration to your needs.
- <sup>+</sup> If during your configuration you cannot delete existing elements, this is certainly due to the fact that these elements are being used. You will thus need to first delete any elements that rely on this data.

# 4. Configuring Taxes

#### If you do not want taxes to be calculated by your store please go directly to the next chapter.

Taxes will be the first thing that we configure within Magelia WebStore, because taxes can be applied to products, delivery charges, etc.

#### Configuring taxes is a process with four logical steps:

- Tax Zones: we will create tax zones that correspond, for example, to different countries. Within these zones, we will see how to create territorial exceptions where the taxes should not be applied or will be applied differently
- 2. **Tax Categories:** we will define the tax categories because not all the products or services are subject to the same taxes
- 3. Tax Rates: we will define tax rates
- 4. Tax Preferences: country by default and tax zone by default
- <sup>1</sup> **Did you know?** One of the major strengths of Magelia WebStore is its capacity to:

#### - apply taxes to the origin or the destination which is very useful in Europe

- **put several taxes on a single product** or a single purchase, which is very useful in countries like Brazil

- manage tax zones and particular cases such as zones for exclusion

These features make Magelia WebStore a powerful solution created for an international context.

## 4.1.Tax Zones

Tax zones determine where taxes will be applied. A tax zone can be defined as a country, a geographic zone smaller than a country, a state or province, or a zone smaller than a state. This allows you to tailor tax application when defining regions that have exceptions.

In the following example, we will show how a company based in the United States (Illinois for example) can apply sales tax to only those purchases made by shoppers in this state. In this case, online sales to shoppers in other states in the U.S. are not subject to sales tax.

### 4.1.1. Step-by-step procedure

To configure this classic case in the Magelia WebStore software, we are going to create a tax zone that corresponds to Illinois

#### To create a tax zone corresponding to a state:

- 1. Go to the screen Tax and Shipping > Tax Zones. Click on "Add New" to create a new tax zone.
- 2. **Code**: Enter "Illinois" for example. The code is simply the unique identifier of the tax zone.
- Continent / Country / State: Now choose the continent (North America), the country (United States) and the State (Illinois), then select "include" to indicate that the tax zone includes Illinois. Click on the "Plus" button and then, click "Save."

| Tax zone               |                           |                   |                  |                      | THELP C            | ANCEL           |
|------------------------|---------------------------|-------------------|------------------|----------------------|--------------------|-----------------|
| GENERAL CONTENT ITEMS  |                           |                   |                  |                      |                    |                 |
| Code : * Illinois      |                           |                   |                  |                      |                    |                 |
| Filters                |                           |                   |                  |                      |                    |                 |
| Continent 🔺            | Country                   | Region/Province/S | State            | Regular expression 🗊 | Rule 🖸             | Action          |
|                        |                           |                   |                  |                      |                    |                 |
|                        | •                         |                   | -                |                      |                    | • •             |
| North America          | United States             | Illinois          |                  |                      | Include            | ×               |
|                        |                           |                   |                  |                      |                    |                 |
|                        |                           |                   |                  |                      |                    |                 |
|                        |                           | 1 h a 1 h .       |                  |                      |                    |                 |
| We can also see the ne | ew tax zone               | that we have      | e just created   | appears in th        |                    |                 |
| EPONYM COM             | PANY                      |                   |                  |                      | Culture<br>English |                 |
| DASHBOARDS PRODUCTS    | CONTENT                   | TAX AND SHIPPING  | SELLERS - STORES | PLATFORM SETTINGS    |                    | ~               |
|                        |                           |                   |                  |                      |                    |                 |
|                        | hipping<br>Shipping Zones | Taxes             | Preferences      |                      |                    |                 |
|                        | Carriers                  | Tax Categories    | Ŵ.               |                      |                    |                 |
|                        | Shipping Rates            | 🗞 Tax Rates       | <i>C</i> ~3      |                      |                    |                 |
|                        |                           |                   |                  |                      |                    |                 |
| Tax zones              |                           |                   |                  | HELP                 | IMPORT EXPORT      | ADD NEW         |
| Search 💌               |                           |                   |                  |                      |                    |                 |
|                        |                           |                   |                  |                      |                    |                 |
|                        |                           |                   |                  |                      |                    | Previous Next 1 |
| Select: All   None     |                           |                   |                  | _                    |                    | Previous Next 1 |
| Select: All   None     | _                         | Code 🔺            | _                |                      | Action             | Previous Next 1 |
| Select: All   None     |                           | Illinois          | -                | -                    |                    | Previous Next 1 |
| Select: All   None     | L.                        |                   |                  |                      | /<br>/×            | Previous Next   |

#### Creating a Shipping Zone corresponding to all U.S. states except Illinois

We repeat the same procedure to create a tax zone corresponding to all U.S. states outside of Illinois, entering the following data:

- Code: USA - IL excluded

- Filter: Consisting of the USA: we select North America + United States + Include

- Filter: To exclude Illinois from this zone, we select North America + United States + Illinois + Exclude

|  | lΥ                    |                                 |                    | English 💌 admin       | ected |
|--|-----------------------|---------------------------------|--------------------|-----------------------|-------|
| DASHBOARDS PRODUCTS  | CONTENT TAX AND SHIPP | ING SELLERS - STORES PLATFORM S | etting\$           |                       |       |
| ax zone  |                       |                                 |                    | HELP CANCEL           | SAVE  |
| GENERAL CONTENT ITEMS  |                       |                                 |                    |                       |       |
| Properties   |                       |                                 |                    |                       |       |
| Code : * USA -   | IL excluded           |                                 |                    |                       |       |
| Filters  |                       |                                 |                    |                       |       |
| Continent 🔺  | Country               | Region/Province/State           | Regular expression | Rule 🕄 Action         |       |
|  |                       |                                 |                    |                       |       |
|  | •                     | <b></b>                         |                    | • •                   |       |
|  |                       |                                 |                    |                       |       |
| North America  | United States         |                                 |                    | Include X             |       |
| North America  | United States         |                                 |                    |                       |       |
|  |                       | Ilinois                         |                    | Exclude               | SAVI  |
| lick "Save."   |                       | eated appear in the lis         | st:                | Exclude               | EW    |
| lick "Save."<br>e two tax zones yo<br>ax zones<br>Search =<br>- Delete | ou have just cr       |                                 | st:                | ECCUOR<br>HELP CANCEL | EW    |
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| lick "Save."<br>e two tax zones yo<br>ax zones<br>Search =<br>- Delete | ou have just cr       | eated appear in the lis         | 5t:                | ECCUOR<br>HELP CANCEL | ords) |

To create new tax zones, simply repeat the procedure given above.

### 4.1.2. Learn more

#### Additional help for tax zones (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Tax.Zones.Edit?help=true

#### Video

In the new window, click the "Video" tab:

<u>http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Tax.Zones.Edit?help=true</u> or watch on Youtube : <u>http://www.youtube.com/watch?v=ognwa8Hsfa8</u>

#### - Help with regular expressions

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Tax.Zones.Edit?help=true

http://www.regular-expressions.info/tutorial.html

## 4.2. Tax Types and Tax Categories

**Tax types simply refer to taxes** like, for example, the VAT in Europe or sales tax in the United States. Tax types are especially useful for regrouping tax categories, which define the specific applicable taxes for products or services.

A tax category is assigned to a tax type and corresponds to a product category where all the same tax calculation rules apply. Tax categories are easy to assign to products and enable Magelia WebStore to automatically calculate the appropriate taxes.

- Tax categories permit, for example, to determine products in Europe that are subject to the VAT standard rate or the VAT reduced rate, etc.
- <sup>+</sup>+ You can also determine tax categories according to merchandise classifications, commodity codes, etc.
- <sup>+</sup> Various tax categories can be assigned to a product in order to apply different taxes to the same product.

## 4.2.1. Step-by-step procedure

#### In this example, we are going to create a tax category for standard products.

Prerequisite: Prior to configuring tax rates, you need to have configured:
 tax types

#### To create a tax category:

- 1. Go to the screen Tax and Shipping > Tax Categories. Click on "Add New" to create a new tax category.
- 2. Enter a tax type. Enter Sales Tax for example in the Tax type field
- 3. Enter a code for the Tax category : the code for the tax category, for example "Standard products"
- 4. Name in different languages: Enter the name of the categorie of taxes in the different languages. For example, "Standard Products" in English and "Produits Standards" in French. Then, "Save."

| EPONYM COMPANY   |  | Culture : Connected as :<br>English 🔽 admin 🕐 |
|--|--|---|
| DASHBOARDS PRODUCTS CONTENT  | TAX AND SHIPPING SELLERS - STORES PLATFORM SETTINGS                                    | ~   |
| Tax category   |  | HELP CANCEL SAVE                              |
| GENERAL CONTENT ITEMS  |  |   |
| Properties   |  |   |
| Tax type : * 72 Codi<br>Sales Tax • Stan   | a : •<br>dard Products   |   |
| Localizations  |  |   |
|  | Name   | Action  |
|  |  | Action  |
| English  | Standard products  | × (   |
| français   | produits standards   | ×   |
|  |  | THELP CANCEL SAVE                             |
|  |  |   |
|  |  |   |
| Creating a second tax category   | for the Shipping and Handling  |   |
|  |  |   |
| We repeat the same procedure   | to create a "Shipping and Handling   | entering the following data:                  |
|  |  | entering the following data:                  |
| We repeat the same procedure<br>- Tax Type : Shipping Tax<br>- Code: Shipping and Handling   |  |   |
| We repeat the same procedure<br>- Tax Type : Shipping Tax<br>- Code: Shipping and Handling   | to create a "Shipping and Handling" tax,   | in French                                     |
| We repeat the same procedure<br>- Tax Type : Shipping Tax<br>- Code: Shipping and Handling<br>- Local names: Shipping and Ha   | to create a "Shipping and Handling" tax,   |   |
| We repeat the same procedure<br>- Tax Type : Shipping Tax<br>- Code: Shipping and Handling<br>- Local names: Shipping and Ha   | to create a "Shipping and Handling" tax,   | in French                                     |
| We repeat the same procedure<br>- Tax Type : Shipping Tax<br>- Code: Shipping and Handling<br>- Local names: Shipping and Ha<br>EPONYM COMPANY<br>DASHBOARDS PRODUCTS CONTENT TAX AL<br>Warehouses Shipping Taxe | to create a "Shipping and Handling" tax,<br>andling in English / services de livraison | in French                                     |

| 0   | ry        |                             |                      | HELP CANCEL SA     |
|---|-----------|-----------------------------|----------------------|--------------------|
| GENERAL CONTEN  | T ITEMS   |                             |                      |                    |
| Properties  |           |                             |                      |                    |
| Tax type : * 😰  | Code      | •                           |                      |                    |
| Shipping Tax  | - Shippi  | ng and Handling             |                      |                    |
| Localizations   |           |                             |                      |                    |
|   | Culture 🔺 | Name                        |                      | Action             |
|   | English   | Shipping and Handling       |                      | ×                  |
|   | français  | services de livraison       |                      | ×                  |
| e <mark>can see tł</mark><br>x categori<br><sub>¤arch</sub> ▼ |           | egories appear in the list. |                      | IPORT EXPORT ADD N |
|   | ne        |                             |                      |                    |
| Delete<br>Select : All   No                                   |           | Code                        | Name                 | Action             |
|   | ▲ 🖸       |                             |                      |                    |
| Select: All   No  |           | Shipping and Handling       | Shipping and Handlin | g 🕺                |

Repeat the procedure given above to create tax categories for services or products with reduced tax rates.

### 4.2.2. Learn more

#### Additional help for Tax Categories (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Tax.Categories.Edit?help=tr ue

#### Video

In the new window, click the "Video" tab: <u>http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Tax.Categories.Edit?help=tr</u> <u>ue</u> or watch on YouTube: <u>http://www.youtube.com/watch?v=7wkj-rbiCMk</u>

## 4.3. Tax Rates

A tax rate is determined by three factors: the tax category, the departure tax zone and the destination tax zone.

- Use the tax rates feature to easily define, for example, that merchandise sent from Illinois and destined for Illinois is subject to a tax of x% and belongs to a given tax category.
- **?** In Europe, this is especially useful since in some cases either the departure tax or the destination tax may apply.

## 4.3.1. Step-by-step procedure

In this example, we are going to create a tax rate for a store shipping from Illinois to Illinois:

- A **Prerequisite:** Prior to configuring tax rates, you will first need to have configured:
  - tax categories
  - tax zones

To create a tax rate:

- 1. Go to the screen Tax and Shipping > Tax Rates. Click on "Add New" to create a new tax rate.
- 2. Tax category: select sales tax Standard products
- 3. **Origin tax zone:** Indicate the tax zone of the origin, **Illinois** in our example. If you ship only from one location and you systematically apply tax at the destination, you do not need to enter the zone of origin.
- 4. Destination zone: Enter the destination tax zone, again Illinois.
- 5. Tax rate: Enter the applicable tax rate, for example 6.25%. Click on the + button to save.

| DASHBOARDS           |               | CONTENT | TAX AND SHIPPING |                 | PLATFORM SETTINGS  |    |          |                 | ~  |
|----------------------|---------------|---------|------------------|-----------------|--------------------|----|----------|-----------------|----|
| ax rates<br>Search ▼ |               |         |                  |                 |                    |    |          | HELP     REFREX | н  |
| •                    | Tax cat       | regory  |                  | Origin tax zone | Destination tax za | ne | Rate (%) | Actio           | n  |
| Standard Proc        | ducts         |         | ▼ Illinois       |                 | ✓ Illinois         | •  |          | 6.25            |    |
| There is no r        | record found. |         |                  |                 |                    |    |          |                 |    |
|                      |               |         |                  |                 |                    |    |          | HELP REFRES     | вн |
|                      |               |         |                  |                 |                    |    |          |                 |    |

#### Creating a second tax rate for Shipping and Handling We are creating another tax zone that will be applied to Shipping and Handling charges that are billed to clients in Illinois. The data to be entered is the following: - Tax category: Shipping Tax > Shipping and handling - Origin tax zone: Illinois - Destination tax zone: Illinois - Tax rate: 7 (for 7% - this is just an example) Culture : Connected as : EPONYM COMPANY English 💌 admin ወ TAX AND SHIPPING Warehouses Shipping Taxes Preferences Shipping Zones 🗞 Tax Zones Tax Categories Carriers 🗞 Shipping Rates Tax rates 7 HELP IMPORT EXPORT -Search -Delete 1 Select : All | None Tax Category 🔺 😨 Actio O ▼ • • Shipping and Handling Illinois • × 7.00000 - Illinois × Standard Products ▼ Illinois • 6.25000 1 showing 1 to 2 (of 2 records) Select : All | None Delete Items per page : 10 20 50 All HELP IMPORT EXPORT

If you wish to create other taxes, repeat the procedure given above.

#### 4.3.2.Learn more

#### Addition help (opens in new window):

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Tax.Rates.List?help=true

#### Video

In the new window, click the "Video" tab:

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Tax.Rates.List?help=true http://www.youtube.com/watch?v=WeqQwmvjSUk

## 4.4. Setting Tax Preferences

We are going to select tax preferences, meaning assuming where web shoppers are from and where they wish for their goods to be delivered.

This screen allows you to define the default rules of tax zones and shipping zones for the different countries where you intend to sell your products.

- Why define these rules by default? When a potential customer visits a website, prices and taxes must be available for him/her to see, even if the customer's location (e.g. delivery address) is unknown, meaning taxes and shipping rates cannot be applied. Tax and shipping rules are useful to assign default taxes and shipping when the shipping address, or location of the customer, is unknown.
  - Of course, when an order is finalized and the shipping address is known, the tax and shipping fees will be recalculated accordingly.

## 4.4.1. Step-by-step procedure

To create a tax preference, we are going to first define a default country – the country where the majority of our web shoppers come from – followed by a default tax zone:

#### To define a default country:

- Go to the screen Sellers-Stores > Store > Store Settings. This screen shows the store's default configuration.
- We are going to just adjust the Default Tax and Shipping Country setting and put United States. By doing so, we assume that the majority of our web shoppers are coming from the United States and will expect tax and shipping rules to apply to their country.
- 3. Save.
  - This setting is only useful as long as the web shopper has not already entered a shipping address. Once we know his precise address, we will apply the tax and shipping rules applicable to his/her address, country, or state of delivery.

Let's now configure with more precision the default tax zone. Indeed, we have just set the default country, but we have not said whether as long we do not know the web shopper's shipping address we should consider that he/she comes from Illinois (and in this case apply sales taxes), or from elsewhere in the United States (and in this case not subject to sales tax).

#### To choose default preferences (tax zones):

- Go to the screen Tax and Shipping > Preferences. This screen shows the list of the preferences by country already created. Click "Add New."
- 2. Specify the country where these preferences will be applied: we select United States.
- 3. **Default Tax Zone:** we select **USA except IL** because we assume that most buyers will be for the from another state in the U.S. than Illinois.

- 4. **Default Shipping Zone:** For now we put nothing here because we have not yet configured shipping zones.
- 5. Click on Save

Thus, if we do not have more precise information, we will consider that a visitor that lands on our site will has the USA – IL exluded tax zone. We see this preference appear in the list:

| EPONYM C        | OMPANY            |                  |                  |                   | Culture : Connected as :<br>English 💌 admin 🕑 |
|-----------------|-------------------|------------------|------------------|-------------------|---|
| DASHBOARDS PF   | RODUCTS CONTENT   | TAX AND SHIPPING | SELLERS - STORES | PLATFORM SETTINGS | ~   |
| Warehouses      | Shipping          | Taxes            | Preferences      |                   |   |
|                 | Shipping Zones    | 🗞 Tax Zones      |                  |                   |   |
|                 | Carriers          | 🔖 Tax Categories | Ŕ.               |                   |   |
|                 | 🗞 Shipping Rates  | 🗞 Tax Rates      |                  |                   |   |
|                 |                   |                  |                  |                   |   |
| Preference      |                   |                  |                  | 7 HELP            |   |
| Properties      |                   |                  |                  |                   |   |
| Country : *     | United States     | •                |                  |                   |   |
| Tax zone :      | USA – IL excluded | •                |                  |                   |   |
| Shipping zone : | 2                 | •                |                  |                   |   |
|                 |                   |                  |                  |                   |   |
|                 |                   |                  |                  | 7 HELP            | CANCEL SAVE                                   |

If you wish to create tax and shipping preference for other countries, follow the procedure given above.

### 4.4.2. Learn more

#### Additional help (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Zones.Preference.List?help =true

Video

In the new window, click the "Video" tab:

<u>http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Zones.Preference.List?help</u> <u>=true</u>

Watch on YouTube: <u>http://www.youtube.com/watch?v=NaDAqu\_dF7U</u>

We will now configure Shipping zones and rates within Magelia WebStore. Magelia WebStore is a flexible system that enables you to define precise shipping zones based on countries, regions/state or sub-region/state defined by regular expressions. You can easily define precise shipping zones and exclude regions or sub-regions from a shipping zone. In terms of shipping rates calculation, Magelia WebStore supports shipping charges by currency and calculation based on order amount, weight or number of items in the basket.

#### Configuring shipping is a process with four logical steps:

- 1. Warehouse: we will define a warehouse
- 2. **Shipping Zones:** we will create shipping zones that correspond, for example, to Mainland USA (excluding Alaska and Hawaï)
- 3. Carriers: we will create carriers / delivery services such as USPS / UPS / etc.
- 4. Shipping Rates: we will with tax rates

## 5.1. Warehouse (Tax Zone)

Warehouses designate storage areas for merchandise. What we call warehouses in WebStore can also correspond to physical stores. Restrictions apply according to the Magelia WebStore Edition that you installed (only 1 warehouse in the Community Edition).

### 5.1.1. Step-by-step procedure

In this example, we are going to create a warehouse based in Chicago, Illinois:

Prerequisite: If you want taxes to be applied based on the origin tax zone of the goods, which is a classic situation in Europe, prior to adjusting warehouse settings, you need to have first configured tax zones.

To create a warehouse or a store containing stock from which you will ship products:

1. Go to the screen Tax and Shipping > Warehouses. This screen shows the list of warehouses that have already been created. Click on "Add New" to create a new warehouse.

|  |   |   |  |  | Culture : Connected as                             |
|--|---|---|--|--|--|
| EPONYM C   | OMPANY  |   |  |  | English 🔽 admin                                    |
| DASHBOARDS   | PRODUCTS CONTENT  | TAX AND SHIPPING  | SELLERS - STORES   | PLATFORM SETTINGS                                      | ~  |
| Warehouses   | Shipping  | Taxes   | Preferences  |  |  |
| Watenooses   | Shipping Zones  | Tax Zones   | Freierences  |  |  |
|  |   | Tax Categories  | Ŵ  |  |  |
|  | Shipping Rates  | 🗞 Tax Rates   | ८्रेंड   |  |  |
|  |   |   |  |  |  |
| Warehouse  | 2   |   |  | P HE   | CANCEL SAVE  |
| GENERAL  |   |   |  |  |  |
| Properties   |   |   |  |  |  |
| Code : *<br>WH1 Chicago  | Tax zone :<br>Illinois  | 2   | •  |  |  |
|  |   |   |  |  |  |
| Localizations-   |   |   |  |  |  |
| Cu   | ulture ▲  |   | Name   |  | Action   |
|  | English   |   | Chicago Warehouse  |  | ×  |
| fr   | rançais   |   | Entrepôt de Chicago  |  | ×  |
| Tax Zone: Sele<br>example, we s<br>Name of the v   |   | that correspor<br>ferent languag  | nds to where t<br><b>ges.</b> For exam                                 | he warehouse i   | s located. In this<br><b>'arehouse</b> " in Englis |
| Tax Zone: Sele<br>example, we s<br>Name of the v<br>and "Entrepô   | ect the Tax Zone f<br>select Illinois.<br>warehouse in diff<br>t de Chicago" in F   | that correspor<br>ferent languag<br>French. Click "S  | nds to where t<br>g <b>es.</b> For exam<br>Save."                      | he warehouse i   |  |
| Tax Zone: Sele<br>example, we se<br>Name of the we<br>and "Entrepôt<br>can see that the  | ect the Tax Zone f<br>select Illinois.<br>warehouse in diff<br>t de Chicago" in F<br>he new warehous  | that correspor<br>ferent languag<br>French. Click "S  | nds to where t<br>g <b>es.</b> For exam<br>Save."                      | he warehouse i   | Culture : Connected as                             |
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- GET MORE warehouses or physical stores with Magelia WebStore Professional and Enterprise Editions. If you have a Professional or Enterprise version and you wish to create other warehouses, follow the procedure given above.
- The tax zone of a warehouse is useful for certain regions like the European Union because different taxes apply according to the location of the warehouse of origin.

#### 5.1.2. Learn more

#### Additional Help (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Warehouses.Edit?help=true

#### Video

In the new window, click the "Video" tab: <u>http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Warehouses.Edit?help=true</u> Watch on YouTube: <u>http://www.youtube.com/watch?v=GMYK2OQaQpQ</u>

## 5.2. Shipping Zone

# A shipping zone corresponds to a geographical area for which one or several modes of transportation will be proposed and for which shipping fees must be calculated.

- A shipping zone can correspond to a region smaller than a state, to a state or several states, to a country, or to a region larger than a country. WebStore is designed so that the delivery zones of your carriers can be easily set up.
- In the following example, we configure a shipping zone by using the concepts of continent, country, and region. If you need to define more precise shipping zones such as by postal code, you will be able to do it using regular expressions. Refer to the section at the end of this document to find out more about regular expressions.

### 5.2.1. Step-by-step procedure

In this example, we are going to create a shipping zone that corresponds to the USA but excludes Alaska and Hawaii, which are non-serviced zones:

#### To create a shipping zone:

 Go to the screen Tax and Shipping > Shipping Zones. This screen shows the list of shipping zones that have been already created. Click on "Add New" to create a new shipping zone.

| EPONYM C               |          | ANY  |  |                  |                      |      | Culture :<br>English | Connected a |
|------------------------|----------|--|--|------------------|----------------------|------|----------------------|-------------|
| DASHBOARDS             | PRODUCTS | CONTENT                                    | TAX AND SHIPPING   | SELLERS - STORES | PLATFORM SETTING     | GS   |                      | -           |
| Warehouses             | Ship     | ping                                       | Taxes  | Preferences      |                      |      |                      |             |
| Ũ                      |          | hipping Zones<br>Carriers<br>hipping Rates | <ul> <li>Tax Zones</li> <li>Tax Categories</li> <li>Tax Rates</li> </ul> | Ê                | ß                    |      |                      |             |
| Shipping zo            |          |  |  |                  |                      | HELP | CANCEL               | SAVE        |
| Properties<br>Code : * | M        | ainland USA                                |  |                  |                      |      |                      |             |
| Filters                |          | Country                                    | Region/Province  | /State           | Regular expression 🗊 |      | Rule 🖸               | Action      |
|                        | <b>•</b> |  |  |                  |                      |      |                      | •           |
| North Ame              | erica    |  |  |                  |                      |      | nclude               | ×           |
| North Ame              | erica    | United States                              | Alaska   |                  |                      | 6    | Exclude              | ×           |
| North Ame              | erica    | United States                              | Hawaii   |                  |                      | E    | Exclude              | ×           |

- 2. Code: unique code designating the shipping zone. Enter Mainland USA.
- 3. **Continent / country / etc.**: We select the continent **North America** and the country **United States**. We select the rule **Include** and click on the **+ button**. In doing this, we are indicating that our shipping zone includes the USA.
- To exclude a zone: select Continent: North America and Country: United States, then select the region to exclude (Alaska, for example). Next, select the rule Exclude and click on the + button. We have just indicated that our shipping zone does not include Alaska. We repeat this procedure for Hawaii.
- 5. **Catalogs**: Link catalogs to your shipping zones. As we have not yet created any catalogs, we cannot enter catalogs here. From the catalog creation scree we will also be able to define available shipping zones.

We have finished, so now we save.

You see the new shipping zone that you have just created appears in the list.

| DASHBOARDS           | PRODUCTS CONTENT  | TAX AND SHIPPING                         | SELLERS - STORES | PLATFORM SETTINGS | ~                               |
|----------------------|---|--|------------------|-------------------|---------------------------------|
| Warehouses           | Shipping         Shipping Zones         Carriers         Shipping Rates | Taxes Tax Zones Tax Categories Tax Rates | Preferences      |                   |                                 |
| Shipping<br>Search - |   |  |                  | HELP IMPORT       | EXPORT ADD NEW Previous Next 1  |
|                      |   | Code 🔺                                   | _                |                   | Action                          |
|                      | M   | ainland USA                              |                  |                   | ×                               |
|                      | None  |  |                  |                   | 1 showing 1 to 1 (of 1 records) |

If you wish to create other shipping zones, follow the procedure given above.

## 5.2.2. Learn more

#### Additional help (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Shipping.Zones.Edit?help=tr ue

#### Video

In the new window, click the "Video" tab

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Shipping.Zones.Edit?help=tr ue

Watch on YouTube: <a href="http://www.youtube.com/watch?v=RFg6IY5JGh8">http://www.youtube.com/watch?v=RFg6IY5JGh8</a>

#### **Regular expressions:**

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Shipping.Zones.Edit?help=tr ue

http://www.regular-expressions.info/tutorial.html

## 5.3. Carriers / Delivery services

Carriers are the businesses responsible for delivering merchandise from the warehouse of origin to the customer's shipping address. Magelia WebStore allows you to easily define carriers and assign them a name and a logo.

Carriers can, for example, be created to designate businesses like DHL, FedEx, UPS, etc.
 When shipping fees are created, these fees will vary to reflect the carrier chosen.

## 5.3.1. Step-by-step procedure

We are going to create a carrier named USPS

#### To create a carrier:

- 1. Go to the screen Tax and Shipping > Carriers. This screen shows the list of already created carriers. Click on "Add New" to create a new Carrier.
- 2. Code: Enter a code like USPS. The code is simply a unique identifier of the Carrier.
- 3. Logo: Designate a logo. For this step, depending on your configuration, you may need to specify in Magelia WebStore where to store images. Go to Sellers-Stores > Store Configuration and enter the Folder path and Folder URL where you want to store the images and media in the FileWorkerComponentBase section. Then upload or choose the logo in the Media Library

| File directory                                  | 🔂 Upload 🕂 I | Refresh 🚹 Up                     | Path : / 💦 Ne | v folder   |                  |            |            | File metadata                       |
|---|--------------|----------------------------------|---------------|------------|------------------|------------|------------|-------------------------------------|
| Carrousel                                       |              |                                  |               |            |                  |            |            | Select file to edit its<br>metadata |
| <ul> <li>Clothes</li> <li>Downloads</li> </ul>  | Carrousel    | Clothes                          | Downloads     | Fragrances | Pillow           | SunGlasses | Watches    |                                     |
| <ul> <li>Fragrances</li> <li>Pillow</li> </ul>  |              |                                  |               |            |                  |            |            |                                     |
| <ul> <li>SunGlasses</li> <li>Watches</li> </ul> |              | Image not available              |               |            |                  |            |            |                                     |
| p 11010112                                      | HANNE THATES | $\bigcirc$                       |               |            |                  |            |            |                                     |
|   | USPS.jpg     | WebstoreImage-<br>not-available- |               |            |                  |            |            |                                     |
|   |              | Lorge.jpg                        |               |            |                  |            |            |                                     |
|   |              |                                  |               |            |                  |            |            | Your selection                      |
|   |              |                                  |               |            |                  |            |            | Drag files here to perform          |
|   |              |                                  |               |            |                  |            |            | selection                           |
|   |              |                                  |               |            |                  |            |            |                                     |
| ne of Carri                                     | er in differ | ent lang                         | uages: 1      | or exam    | ple <b>USP</b> : | in Engl    | lish and i | n French. Ther                      |
| ve."  |              |                                  |               |            |                  |            |            |                                     |
|   |              |                                  |               |            |                  |            |            |                                     |

| EPONYM                                      | COMPANY          |                  |                  |                   | English 💌 adn | nin  |
|---|------------------|------------------|------------------|-------------------|---------------|------|
| DASHBOARDS                                  | PRODUCTS CONTENT | TAX AND SHIPPING | SELLERS - STORES | PLATFORM SETTINGS |               | -    |
| Warehouses                                  | Shipping         | Taxes            | Preferences      |                   |               |      |
|   | Shipping Zones   | 🗞 Tax Zones      |                  |                   |               |      |
|   | Garriers         | 🔖 Tax Categories | ×.               |                   |               |      |
|   | 🗞 Shipping Rates | 🗞 Tax Rates      |                  |                   |               |      |
|   |                  |                  |                  |                   |               |      |
| Carrier                                     |                  |                  |                  | P HEL             | CANCEL        | SAVE |
| GENERAL                                     | DNTENT ITEMS     |                  |                  |                   |               |      |
| Properties                                  |                  |                  |                  |                   |               |      |
| Code : * 🔋                                  |                  |                  |                  |                   |               |      |
| USPS  |                  |                  |                  |                   |               |      |
| Logo  |                  |                  |                  |                   |               |      |
|   | CLEAR REFRESH    | ADD FILE         |                  |                   |               |      |
|   |                  |                  |                  |                   |               |      |
| UNTED STATES<br>POSTAL SERVICE.<br>USPS.jpg |                  |                  |                  |                   |               |      |
|   |                  |                  |                  |                   |               |      |
|   |                  |                  |                  |                   |               |      |
| -Localization                               | S                |                  |                  |                   |               | _    |
|   | Culture 🔺        |                  | Name             |                   | Action        |      |
|   | English          |                  |                  |                   | 1             |      |
|   | English          |                  | USPS             |                   | x             |      |

If you wish to create other Carriers, follow the procedure given above.

### 5.3.2. Learn more

#### Additional Help (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Carriers.Edit?help=true

#### Video

In the new window, click the "Video" tab <u>http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Carriers.Edit?help=true</u> Watch on YouTube: <u>http://www.youtube.com/watch?v=Sa5ogN3PW3Y</u>

## 5.4. Shipping Rates

Shipping/Delivery charges correspond to price ranges determined for the carrier, the warehouse, the merchandise, and the shipping zone.

The shipping/delivery charges themselves can be subject to taxes and are therefore assigned to a tax category.

## 5.4.1. Step-by-step procedure

- A **Prerequisite:** Prior to configuring tax rates, you need to have configured:
  - shipping zones
  - carriers
  - tax categories if you want taxes to apply to shipping rates

To be able to apply shipping taxes to shipping rates, we need to have a Shipping and Handling tax category, and a sipping rate defined for this tax category and a tax rate that applies. Simply refer to the chapter about taxes if you need to create additional data.

#### To create a Shipping Rate:

- 1. Go to the screen Tax and Shipping > Shipping rate. Click on "Add New."
- 2. Code: Enter a code like USPS Ground. This code is simply a unique identifier of the Shipping Rate.
- 3. Choose a Carrier: we select USPS
- 4. Choose a warehouse from which the merchandise will leave: we select WH1 Chicago
- 5. Choose the shipping zone: we select Mainland USA
- 6. Enter the name of the Shipping Rate in different languages: for example USPS Ground Shipping in English and USPS Livraison Terrestre in French. Next, "Save."
- 7. Tax categories: As shipping costs are subject to taxes, let us therefore associate them to a tax category. We select the tax category **Shipping and Handling tax cat** that will apply a **7% tax** to the shipping charges if they are shipped **from Illinois to Illinois.**
- 8. **Calculation criteria:** choose in what terms you would like the shipping fees to be paid: by weight, by quantity, or by order amount; **we select by order total** (e.g. amount).
- Now enter the shipping fees. For this simple example we select the currency (USD) an dedefine that from \$0 and upwards (no max value entered for "to" column), the shipping rates should be 10. With WebStore, you can also define these amounts in ranges and by currency.
- 10. Finally, click on "Save."

| Shipping rate   |   |                     | HELP CANCEL SAVE   |
|---|---|---------------------|--|
| GENERAL CONTENT ITEMS   |   |                     |  |
| Code : * Carrier : * 🝸  |   | ipping zone : • 👔   | _  |
| USPS Ground USPS  | WH1 Chicago   | Iainland USA        |  |
| Localizations   |   |                     |  |
| Culture 🔺   | Description<br>USPS Ground Shipping                 |                     | Action   |
| français  | USPS Livraision Terrestr                            |                     | × (  |
| n on gone   |   | *<br>               | ×  |
|   | ated tax categories :<br>ng and Handling            |                     |  |
| Values<br>Criteria :  Currency  Currency  USD - US Dollar   | From I         To I           \$0.00         \$0.00 |                     | Rate         Action           Image: State of the s |
| We can see the new Carrier a  | ppears in the list.                                 |                     |  |
| EPONYM COMPANY  | ,   |                     | Culture : Connected as :<br>English 💌 admin 🖒  |
| DASHBOARDS PRODUCTS CC  | INTENT TAX AND SHIPPING SELLERS - STORES            | S PLATFORM SETTINGS | ~  |
| Warehouses     Shipping       Image: Shipping     Image: Shipping       Image: Shipping     Image: Shipping       Image: Shipping     Image: Shipping       Image: Shipping     Image: Shipping | Tax Categories                                      | 3                   |  |
| Shipping rates  |   | HELP IMPOR          | T EXPORT ADD NEW   |
| Delete<br>Select: All   None  |   |                     | Previous Next 1  |
| Code 🔺 Carrier 🗹  | Warehouse 🗹 Shipping zone 🗹                         | Criteria 🖸          | Description Action   |
| USPS Ground USPS  | WH1 Chicago Mainland USA                            | Order total U       | SPS Ground Shipping  |
| Select : All   None<br>Delete   |   |                     |  |
|   |   | HELP IMPOR          |  |

If you wish to create other Shipping Rates, follow the procedure given above.

### 5.4.2. Learn more

### Additional Help (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Shipping.Rates.Edit?help=tr ue

#### Video

In the new window, click the "Video" tab

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Shipping.Rates.Edit?help=tr ue

Watch on YouTube : http://www.youtube.com/watch?v=GnyOmsNZHMs

## 5.5. Setting Preferences for Shipping (and Tax)

We are going to select shipping preferences. In paragraph 4.5 (Setting Preferences for Taxes), we defined tax preferences, but we did not define shipping preferences because we hadn't yet created shipping zones. Now that we have created shipping zones, we can finish configuring our settings.

- Why define these rules by default? When a potential customer visits a website, prices and taxes must be available for him/her to see, even if the customer's location is unknown, meaning taxes and shipping rates cannot be applied. Tax and shipping rules are useful to assign default taxes and shipping when the shipping address, or location of the customer, is unknown.
  - Of course, when an order is finalized and the shipping address is known, the tax and shipping fees will be recalculated accordingly.

## 5.5.1. Step-by-step procedure

#### To create a Tax and Shipping Preferences for a country:

- Go to the screen Tax and Shipping > Preferences. This screen shows a list of already created preferences by country. We will modify the already created preference for the USA by clicking on the pencil icon across from USA
- 2. Default Tax Zone: USA except IL is already selected because we previously configured it.
- 3. **Default Shipping zone:** we will choose Mainland USA because it is most likely that clients will be in the USA since this is the only shipping zone that we have defined.

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If you wish to create other preferences for other countries, simply follow the procedure given above.

### 5.5.2. Learn more

#### Additional Help (opens in new window)

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Zones.Preference.List?help =true Video

#### In the new window, click the "Video" tab

http://www.magelia.org/documentation/adminconsole/TaxAndShipping.Zones.Preference.List?help =true

Watch on YouTube: <u>http://www.youtube.com/watch?v=NaDAqu\_dF7U</u>

We will now proceed to how to setup products.

Magelia allows you to configure many types of products: standard products, bundles, products with variants. In this Quickstart Walkthrough, we do not show how to create complex products like bundles or products with variants. Refer to the online help for product types and product attributes, or to the demonstration videos on the Magelia WebStore YouTube channel.

To setup products, we are going to proceed using six steps:

- 1. Create a catalog that will group products
- 2. Create a category within the catalog we created
- 3. Create an attribute that will be linked to our products so that they possess an image
- 4. Create an attribute that will enrich our products
- 5. **Create a simple product type** and attach to this product type the attribute that we just created
- 6. **Create a product** and give it a price, an inventory count and attach it to a catalog and category.
- 7. Generate the catalog that will be visible on the site using the data update mechanism.

Once we have accomplished these steps, we will have practically finished setting-up the store, and if you have the demo front-office, you will see the site online.

## 6.1.Catalog

A catalog groups products on an e-commerce website. A catalog is defined by start and end date, tax calculation rules, multiple currencies in which products can be sold, and shipping zones.

Magelia WebStore Professional and Enterprise Editions support multiple catalogs. You can create catalogs for a specific season (winter catalog / summer catalog) a specific audience (retail / b2c catalog / wholesale b2b catalog), a specific shipping zone (North American, European catalog, etc.), and more.

## 6.1.1.Step-by-step procedure

We are going to create a very basic catalog

#### To create a Catalog:

- 1. Go to the screen Products > Products > Catalogs. Click on "Add New."
- 2. Code: enter base catalog
- 3. **Start and end dates:** the catalog is valid only between the defined start and end dates. For this example **we leave these fields blank** to indicate that our catalog is always available. This feature is very helpful to prepare catalogs well in advance or to program when the catalog should no longer be displayed (end time and date)

4. **Prices include taxes**: we leave this **box unchecked** because we want to enter product prices without taxes. Taxes, if they apply, will be calculated and added to the amount in order to establish the total price at check-out.

If you check taxes included, taxes will be deducted from the inclusive price in order to calculate the price before taxes. (For example, a tax-included price might be \$60. So, calculating tax at check-out would be \$50 for the product plus \$10 for taxes).

- 5. **Is active:** during the creation of a catalog, you certainly prefer that this catalog not appear online before you have finished preparing it. Therefore you will only check the box "is active" when you are satisfied and ready to publish the catalog. For this example, in order avoid returning to this screen, we check the box **is active**.
- 6. Localizations: enter the name of the catalog in different languages (base catalog in English and catalogue de base in French).
- 7. Stores: choose the name of the store
- 8. Currency: choose USD (\$)
- **9. Shipping zone**: all existing shipping zones are automatically associated with the catalog, so you do not need to modify this.
- 10. Click save

#### Products tab

We have not yet created any products, so this screen is not useful to us for the moment. This screen allows you to assign products to a catalog or to un-assign them. You can also designate a product catalog when creating products.

#### Media TAB

For this basic configuration example, we are not going to associate any media with our catalog. This tab allows you to assign files or images to a catalog. Using this feature, you can display images assigned to your catalog if you wish.

#### To learn more:

http://www.magelia.org/documentation/adminconsole/Products.Catalogs.Edit.medias?help=true

We have finished configuring a catalog, and now we save:

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| Select : All   | None                |                    |                      | TIC TICUT             |                             |

**GET MORE with the Professional and Enterprise versions:** 

- You have the possibility to manager several catalogs

- Share catalogs among several stores belonging to the same vendor. This allows you to more easily synchronize catalogs with your information system and centralize catalog management.

## 6.1.2. Go further

Help on creating catalogs

http://www.magelia.org/documentation/adminconsole/Products.Catalogs.Edit.general?help=true

Demonstration video on creating catalogs

Click on the video tab of the following help section <u>http://www.magelia.org/documentation/adminconsole/Products.Catalogs.Edit.general?help=true</u> or watch on YouTube : <u>http://www.youtube.com/watch?v=jWC5Tyay4WM</u>

Help on assigning products to a catalog

http://www.magelia.org/documentation/adminconsole/Products.Catalogs.Edit.associatedproducts? help=true

Help on managing media

http://www.magelia.org/documentation/adminconsole/Products.Catalogs.Edit.medias?help=true

## 6.2. Categories

Categories allow for further organizing products inside of a catalog. Categories are hierarchical and Magelia WebStore allows vendors to define categories, subcategories, and subsections of subcategories, etc.

• The same product can be placed in several categories of a given catalog.

## 6.2.1. Step-by-step procedure

Prerequisite: a catalog is necessary because categories are organized within a catalog.

We are going to create a sunglasses category in our default catalog.

#### To create a catalog:

- 1. Go to the screen Products > Products > Categories. This screen shows the list of categories of a catalog. The catalog "Base Catalog" is pre-selected.
- 2. Move the mouse to the **Root** category and click on the <sup>①</sup> button to create a category.
- 3. Enter the category name "**Sunglasses**" and click on the icon to save or press enter. The category has been created and you will now enter additional data in the screen on the right.
- 4. Code: The code is already filled-in
- 5. Is Active: by default the category is active. We don't change anything.
- 6. **Is Online**: by default the category **is online**, meaning displayed and this is what we want. If certain products were assigned to active categories but invisible we would have checked "is active" but not "is online" (for example, used for catalog management, flyers, samples, etc.).
- 7. Culture: We select English and enter for the short description Sunglasses
- 8. **Culture**: to enter the content in another language, we just need to choose the language (**French**) in the list of languages. We then enter the names and the short description in French (lunettes de soleil.)

#### Products Tab

The screen **allows us to assign products to a category**. As we haven't yet created any products, we are not using this tab. We will see later on that it is also possible to assign a product directly to a category from the product file.

#### Media Tab

We could **add images**, **videos**, **or sound** to this category by selected the Media Tab. To keep things simple, we will not add any images for the moment.

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You can repeat this procedure to create other categories and sub-categories

**Other Functions:** In Category Management, the icons located on the right of the category name allow you to move a category, copy or duplicate, and delete. We do not go into the specifics of these functions. You may watch the YouTube video (link) for a demonstration.

## 6.2.2.Additional resources

 Presentation video on creating categories
 Click the Video Tab in the new window: <u>http://www.magelia.org/documentation/adminconsole/Products.Categories?help=true</u> or on Youtube : <u>http://www.youtube.com/watch?v=2GjfVF61Dh0</u>

#### - Online Help for Categories

http://himalaya.int.magelia.local/documentation/adminconsole/Products.Categories

## 6.3. Creating an Attribute

A product type groups together different products with similar characteristics, indicates the product nature, and defines rules for products like how products are managed in stock.

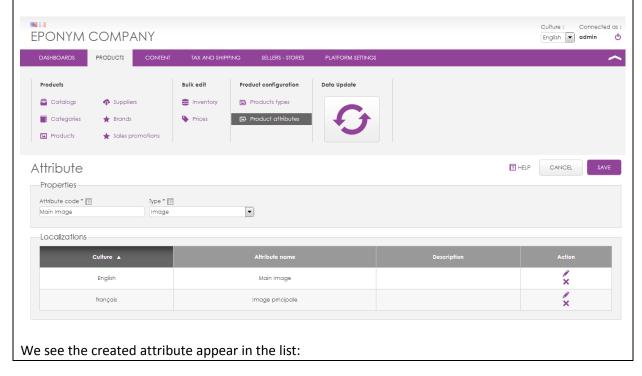
We will create and attribute and then create a product type that will include the newly created attribute.

## 6.3.1. Step-by-step procedure

For our products we are going to want to be able to add images. For this we are going to create an image-type attribute that we will then associate with the product type that we are going to create.

#### To create an attribute:

- 1. Go to the screen Products > Product Configuration > Product Attributes. This screen shows the list of already created attributes. Click on "Add New."
- 2. **Code:** enter **Main Image** because we are looking to create a main image that will be associated with our products.
- 3. **Type**: Select **Image** since we want to associate a single image. If we want to be able to associate several images, we simply choose "Images." In this case, it will be necessary to associate each image with tags in order to be able to distinguish them (see the help section on media for more information).
- 4. Localizations: type "main image" here (in English) and "image principale" (in French) and then click "Save."



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| ttributes<br>Search ▼                   |              |         | _            | Attribute no        | me              | Description | Туре 🗊 | Previ |         |

If you wish to create other attributes, simply follow the procedure given above.

## 6.3.2. Learn more

- Help with attributes:

http://www.magelia.org/documentation/adminconsole/Products.Attributes.Edit?help=true

Demonstration video for creating product types:
 Click the "Video" tab on the help screen
 <u>http://www.magelia.org/documentation/adminconsole/Products.Attributes.Edit?help=true</u>
 Watch on YouTube : <u>http://www.youtube.com/watch?v=9cuXuOkWeXM</u>

## 6.4. Product Types

A product type groups together different products with similar characteristics, indicates the product nature, and defines rules for products like how products are managed in stock.

## 6.4.1. Step-by-step procedure

#### To create a product type:

- 1. Go to the screen Products > Product Configuration > Product Type. This screen displays the list of already created products. Click on "Add New."
- 2. Code: enter standard products because we are looking to create a very simple, classic product.
- 3. **Product kind**: select **standard**. Later, if you wish to create products with variants (such as clothing that is available in several sizes, shoes, MP3 players in several colors, etc.) then choose variant products. If you wish to create bundles that group several products in one single product, then choose bundles.
- 4. **Inventory management**: We indicate here that we wish to manage our products in stock. Choose **physical managed**. This is how we generate the stocks of our products.
- 5. **Attributes**: attributes allow us to enrich products. For this example, we associate the attribute Main Image that we have created previously, and we leave "required" unchecked because adding an image to a product is not obligatory. **Click on the + icon** to add the attribute to the product type.
- 6. Localizations: indicate standard product here in English and "produit standard" in French.
- 7. Click "Save."

| DARROWING PRODUCT CANTON INCOME TAX AND SHIPPING SELES - STORES PACHOOM SETTINGS     Products Suppliers   Products Subspring   Products Product stridutes      Product stridutes   Products Subspring      Product stridutes   Products Subspring   Product stridutes   Products Subspring   Product stridutes   Products Subspring      Product stridutes   Product stridutes Inventory management : * *   Product stridutes   Product stridutes Inventory management : * *   Product stridutes   Product stridutes Inventory management : * *   Product stridutes   Product stridutes Inventory management : * *   Product stridutes   Product stridutes Inventory management : * *   Product stridutes   Product stridutes Inventory management : * *   Product stridutes   Product stridutes Inventory management : * *   Product stridutes   Inventory Inventory management : * *   Product stridutes <th></th> <th>NY</th> <th></th> <th></th> <th></th> <th>English 💌 admin</th>  |  | NY                   |                    |                          |           | English 💌 admin |
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|   | Main Image                                 | Main Image           |                    | Name                     | V         | 1 v O           |
|   | Main Image Localizations Culture / English | Main Image           |                    | Name<br>Standard product | V         | Action          |

| DASHBOARDS                         | PRODUCTS     | CONTENT | TAX AND SHIPF | PING SEL   | LLERS - STORES | PLATFORM SETTING | 26 |   |        |        |          |
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Attributes: Adding additional attributes to products is possible, given that you have created the attribute beforehand. Color, size, the number of megapixels, the storage capacity... These are just a few examples of attributes you can create to further enrich your products.

If you wish to create other product types, follow the procedure given above.

### 6.4.2. Learn more

- Help on Product Types:

http://www.magelia.org/documentation/adminconsole/Products.Types.Edit?help=true

- Demonstration video for creating product types: http://www.youtube.com/watch?v=pZnyZht7i6s

- Help with Attributes: http://www.magelia.org/documentation/adminconsole/Products.Attributes.Edit?help=true

## 6.5. Product

We will now create a product in Magelia WebStore and fill in all the information relative to this product: product type, the SKU, the way the product is handled by taxes and inventory, the titles in different languages, catalogs, categories, assigned products, prices, and stocks, etc.

### 6.5.1. Step-by-step procedure

#### Prerequisite:

- Product Type: a product being defined by its type, it is necessary to dispose of a product type to create a product

Even if it is not obligatory, it is recommended to also have a catalog of categories and a warehouse catalog (if your products are manage in inventory).

We are going to create a very simple project: a pair of sunglasses.

Caution! The case presented below is very simple. Refer to the Help and the videos for detailed information on creating products such as products with variants or bundles, or to find out the meaning of all the available fields in the product file.

#### To create a product:

- 1. Go to Products > Products. This screen presents the list of products. Click on Add New to start creating a product
- 2. General Tab:

**Product Type:** Choose Standard Product which corresponds to the product type that we created previously.

SKU: indicate the unique reference of the product, for example 123QWE

**Is Active**: **Check this box** to indicate that the product is active. Only active products are sold online.

**Is Online: Check this box** to indicate that the product needs to be visible on the site **Catalogs**: base catalog is the already selected and we do not need to change this.

Taxes: Indicate Sales Tax > Standard Products because the product is subject to sales taxes, if applicable

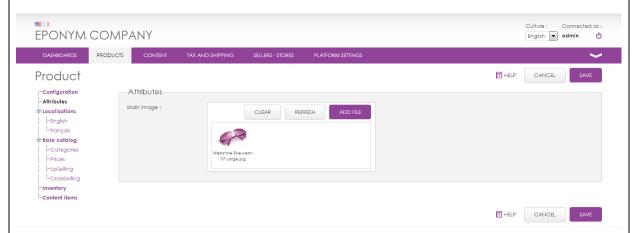
**Warehouse**: **WH1 Chicago** is already selected because the product stocks are in the Chicago store/warehouse.

| D.10                        |   |               |   |                   |      |             |      |
|-----------------------------|---|---------------|---|-------------------|------|-------------|------|
| DASHBOARDS                  | PRODUCTS CONTENT  | TAX AND SHIPP | PING SELLERS - STORES                                   | PLATFORM SETTINGS |      |             | -    |
| Products                    |   | Bulk edit     | Product configuration                                   | Data Update       |      |             |      |
| atalogs                     | Suppliers   | S Inventory   | 🖾 Products types  |                   |      |             |      |
| Categories                  | * Brands  | Prices        | Product attributes                                      |                   |      |             |      |
| Products                    | Sales promotions  | Ť             |   |                   |      |             |      |
| Product                     | -   |               |   |                   | HELP | CANCEL      | SAVE |
| Configuration               | Properties  |               |   |                   |      |             |      |
| Attributes                  | Product type *  | 💽 Stand       | dard product  | •                 |      |             |      |
| English                     | sku *   | 2 123Q        | WE  |                   |      |             |      |
| français                    | Supplier  |               |   | •                 |      |             |      |
| Categories                  | Supplier code   | 2             |   |                   |      |             |      |
| Prices<br>UpSelling         | Brand   |               |   | -                 |      |             |      |
| CrossSelling                | Weight  |               |   | a                 |      |             |      |
| -Inventory<br>Content items | Width   |               |   | Inch              |      |             |      |
|                             | Height  |               |   | Inch              |      |             |      |
|                             | Length  |               |   | Inch              |      |             |      |
|                             | is sample   |               |   |                   |      |             |      |
|                             | Is active<br>Is online  | 2             |   |                   |      |             |      |
|                             | is online   | ?             |   |                   |      |             |      |
|                             | Catalogs-   |               |   |                   |      |             |      |
|                             | Available catalo  | gs :          | Assigned catalo   | ogs :             |      |             |      |
|                             |   |               | <ul> <li>Base catalog</li> </ul>                        |                   |      |             |      |
|                             |   |               |   |                   |      |             |      |
|                             |   |               |   |                   |      |             |      |
|                             |   |               |   |                   |      |             |      |
|                             | -   | Ŧ             |   | ·                 |      |             |      |
|                             | Tax<br>Available tax categories :   | As            | ssigned tax categories :                                |                   |      |             |      |
|                             |   |               | signed tax categories :<br>ales Tax > Standard Products |                   |      |             |      |
|                             | Available tax categories :  |               |   |                   |      |             |      |
|                             | Available tax categories :  | Handling      |   | ·                 |      |             |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and   |               |   |                   |      |             |      |
|                             | Available tax categories :  | Handling      |   | *                 |      |             |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and   | Handling S    | ales Tax > Standard Products                            | ×                 |      |             |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and   | Handling S    | ales Tax > Standard Products<br>signed warehouses :     |                   |      |             |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and   | Handling S    | ales Tax > Standard Products<br>signed warehouses :     | *                 |      |             | La   |
|                             | Available tax categories :<br>Shipping Tax > Shipping and   | Handling S    | ales Tax > Standard Products<br>signed warehouses :     |                   |      |             | Ş    |
|                             | Available tax categories :<br>Shipping Tax > Shipping and   | Handling S    | ales Tax > Standard Products<br>signed warehouses :     |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and   | Handling S    | ales Tax > Standard Products<br>signed warehouses :     |                   |      | HELP CANCEL |      |
| Click on At                 | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :             | Handling S    | ales Tax > Standard Products<br>signed warehouses :     |                   |      | HELP CANCEL |      |
| Click on At                 | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :             | Handling S    | ales Tax > Standard Products<br>signed warehouses :     |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :<br>tributes | Handling A    | signed warehouses :<br>(H1 Chicago                      |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :             | Handling A    | signed warehouses :<br>(H1 Chicago                      |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :<br>tributes | Handling A    | signed warehouses :<br>(H1 Chicago                      |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :<br>tributes | Handling A    | signed warehouses :<br>(H1 Chicago                      |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :<br>tributes | Handling A    | signed warehouses :<br>(H1 Chicago                      |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :<br>tributes | Handling A    | signed warehouses :<br>(H1 Chicago                      |                   |      | HELP CANCEL |      |
|                             | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :<br>tributes | Handling A    | signed warehouses :<br>(H1 Chicago                      |                   |      | HEIP CANCEL |      |
| are going to                | Available tax categories :<br>Shipping Tax > Shipping and<br>Warehouses<br>Available warehouses :<br>tributes | Handling S    | ales Tax > Standard Products                            |                   |      | HELP CANCEL |      |

We can either drag and drop the image directly into this window or use the button "Add file." We click on Upload, then Select file, and we retrieve the image on the computer. The image appears in the background. We close the Add File window.

For each image, we could define a tag or localized meta-data. We ask that you consult the File Manager help to find out all the possibilities offered by this functionality.

We double-click on the image that we have just added to the file manager to assign this image to a product. The image should appear as:



#### 4. Localizations

Click on **Localizations > English** in the menu on the left and enter the names and localized descriptions in English:

#### Name: PurpleSun

**Descriptions**: These sunglasses merge state-of-the-art Italian design with superior quality. Designed for innovative and open minds, they combine outstanding craftsmanship with contemporary styling.

Repeat for French:

Nom : PurpleSun

**Descriptions** : Ces lunettes de soleil de conception italienne sont de grande qualité. Conçu pour les esprits novateurs et ouverts, elles conjuguent une qualité de fabrication parfaite à un style contemporain.

| DASHBOARDS                                       |   |   |  |   |   | English 💌 admin   |
|--|---|---|--|---|---|---|
|  | PRODUCTS CONTENT  | TAX AND SHIPPIN   | NG SELLERS - STORES P  | ATFORM SETTINGS   |   | ~   |
| Product  |   |   |  |   | i i   | 7 HELP CANCEL SAVE  |
| Configuration                                    | Languages   |   |  |   |   |   |
| - Attributes                                     | Name 🦻  |   |  |   |   |   |
| English  | Purple Sun  |   |  |   |   |   |
| E-français                                       | Short description   |   | ⊛a laa A2 luas av l⇔⊳ 3% luar Het  |   |   |   |
| Categories                                       |   |   | । 🔁 🕅 🏰 🔊 (॰ ) ∞ 💥 💆 📕<br>italian design with superior quality.  | Paragraph • 🛓 • Ω   MTTL 📴  |   |   |
| Prices<br>UpSelling                              |   |   |  |   |   |   |
| ICrossSelling                                    |   |   |  |   |   |   |
| Content items                                    | Path: p   |   |  |   |   | h.  |
|  |   |   | . (94) IAA, AZ, IVA, IVA, IVA, IVA, IVA, IVA, IVA, IVA   |   |   |   |
|  |   |   |  |   | pen-minded consumer, they combine   | a superior quality with contemporary  |
|  | styling.  |   |  |   |   |   |
|  |   |   |  |   |   |   |
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|  |   |   |  |   |   |   |
| ase Catalog                                      |   |   |  |   |   |   |
| ince the pro                                     | duct is prese   | nt in a sing  | gle catalog, we a  | are going to ind  | icate in which  | categories it   |
|  |   | (   |  | 0 0 11 11   |   | 0   |
| -  | -   |   |  | -   |   |   |
| f the product                                    | were preser   | nt in sever   | al catalogs (Pro   | essional and E  | nterprise Editi   | ons feature) , we   |
| ould choose                                      | categories a  | nrice and   | d different artic  | es for cross sel  | ling and unsel  | ling by catalog   |
|  | categories, a   | price, and  |  | 23 101 01033 301  | ing and apsel   | mig by catalog.   |
| ategory. For                                     | information,  |   | -  |   |   | ure : Connected as :  |
|  |   |   |  |   |   |   |
| DASHBOARDS PR                                    | SDOCIS CONTENT  | TAX AND SH  | IPPING SELLERS - STORES  | PLAIFORM SETTINGS   |   |   |
| Products   |   | Bulk edit   | Product configuration  | Data Update   |   |   |
|  | Supplier  |   |  |   |   |   |
|  |   |   |  |   |   |   |
| Categories                                       | 🚖 Brands  | Prices  | Product attributes   | + 1   |   |   |
| Products   | Sales promotions  |   |  |   |   |   |
| Product  |   |   |  |   | THELP C   | CANCEL  |
|  |   |   |  |   |   |   |
| "Configuration<br>"Attributes                    | -   |   |  |   |   |   |
| Localizations                                    | ⊟•⊡root<br>! <b>∑</b> Sunglas   | 202   |  |   |   |   |
| English  |   | 909   |  |   |   |   |
| L français                                       |   |   |  |   |   |   |
| Base catalog<br>Categories                       |   |   |  |   |   |   |
|  |   |   |  |   |   |   |
| Prices   |   |   |  |   |   |   |
| -Prices<br>UpSelling                             |   |   |  |   |   |   |
| Prices<br>UpSelling<br>CrossSelling              |   |   |  |   |   |   |
| -Prices<br>UpSelling                             |   |   |  |   |   |   |
| Prices<br>UpSelling<br>CrossSelling<br>Inventory |   |   |  |   | Runa  |   |
| Prices<br>UpSelling<br>CrossSelling<br>Inventory |   |   |  |   | THELP C   | SAVE  |
| Prices<br>UpSelling<br>CrossSelling<br>Inventory |   |   |  |   | THELP C   | SAVE  |
|  | ase Catalog<br>ince the product<br>ould choose<br>ategories: ch<br>ve want the p<br>ategory. For<br>PONYM CCC<br>DASHBOARDS PRO<br>Products<br>Catalogs Catalogs<br>Catalogs Catalogs | Constanting         Path: p         Inventory         Content items         Path: p         Inventory         Path: p         Product were present         Ponter         Ponter         Ponter         Ponter         Products         Products         Products         Products         Products         Products         Products         Products         Products         Preducts< | Inventory         Content items         Path p         Ince the product is present in a single elongs and its price.         The product were present in sever pould choose categories, a price, and         ategories: choose Sunglasses         Ve want the product to be displayed ategory. For information, a product         PONYM COMPANY         DashBOARDS       PRODUCTS         Content is prices         Ponymetry         Content is product to be displayed ategory. For information, a product         DashBOARDS       PRODUCTS         Content is prices         Products       Soles promotions         Products       Soles promotions         Products       Soles promotions | Investiging the product is present in a single catalog, we at elongs and its price.         The product were present in several catalogs (Product choose categories, a price, and different article at going the sunglass at elongs.         Additional decopies, a price, and different article at elong the sunglass at elongs.         Additional decopies in several catalogs (Product at elongs).         Diverse present in several catalogs (Product at elongs). | Image: Control of the product is present in a single catalog, we are going to independent is present in a single catalog, we are going to independent is present in several catalogs (Professional and Eroudd choose categories, a price, and different articles for cross selected by and the product to be displayed in the sunglasses category so attegory. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information, a product can be attached to multiple category. For information. | Second and the product is present in a single catalog, we are going to indicate in which elongs and its price.   The product were present in several catalogs (Professional and Enterprise Edition of the order articles for cross selling and upsel attached to multiple categories; a price, and different articles for cross selling and upsel attached to multiple categories.   Astegories: choose Sunglasses   We want the product to be displayed in the sunglasses category so we click on the ategory. For information, a product can be attached to multiple categories.   Second Composition (Composition) (Compos |

they will receive from your site as compared to the normal price. The Sale Unit allows, in the Professional and Enterprise Editions, to define a sale unit (such as products sold in pairs, for example). HELP CANCEL Product ---Configuration Prices Attributes Localizations SKU 🔺 ---English 0 français 123QWE -230 250 Base catalog ---Categories ---Prices ---CrossSelling Inventory Content items HELP CANCEL SAVE 8. Upselling and Cross Selling: as we have only created a single product, we do not choose any products for cross- or upselling 9. Inventory We will enter the different values for the inventory and explain the different stocks - Virtual Stock: We enter the value Virtual Stock = 1000 for this example. Virtual stock corresponds to the available stock for sale on a website. Warning! Virtual Stock decreases with each add to the shopping cart. - Real stock: We enter the value Real Stock = 1000 for this example. Real stock corresponds to the available merchandise that is actually in the warehouse. Sales do not affect the real stock level. The real stock is not taken into account in the calculations: you must manually manage the stock. Minimum stock: Usually the value is 0 so we enter Minimum stock =0 When an inventory of a product falls below the minimum stock, it can no longer be sold. Warning: if you have 10 products remaining in virtual stock and you have set Min stock to 10 products, you can no longer sell products. A minimum stock may be negative to allow customers to order more than what is really in stock. - Reorder Level: we do not enter any value here This is a simple piece of information that enables the vendor to make a list of products that are below the inventory level and the reorder level. HELP CANCEL Product Configuration Stock - Attributes Availability SKU 🔺 Localizations English -francais 123QWE WH1 Chicago 1000 1000 0 Base catalog 00 T H 00 T M 00 T Categorie --Prices -- CrossSelling Inventory -Content items 7 HELP CANCEL **Content Items** For this example we will not add content to our product.

Thanks to Magelia WebStore content management features, products can be enriched with contents. This is particularly useful if you want to add specific descriptions of your products, user manuals or files, videos, files, etc.

Magelia WebStore is built on an extensible data model that enables you to create content types. These content types can be useful as standalone contents (a store locator, a recipes section, a news section could rely on content types) or contents can enrich commerce objects such as products, categories, catalogs etc.

The community Edition includes one content type that is useful to associate and enrich SEO contents to your website.

|                                       | COMPA  | ANY .         |                          |                              |            |  |             | Culture :<br>English     | ▼ adm          | nected -<br>in |
|---------------------------------------|--|---------------|--------------------------|------------------------------|------------|--|-------------|--------------------------|----------------|----------------|
| DASHBOARDS                            | PRODUCTS   | CONTENT       | TAX AND SHIPPII          | NG SELLER                    | s - stores | PLATFORM SETTINGS                                      |             |                          |                | -              |
| Products Catalogs Categories Products | <ul> <li>Image: Supplier</li> <li>Image: Brands</li> <li>Image: Sales press</li> </ul> |               | Bulk edit                | Product config<br>Products t | ypes       | Data Update  |             |                          |                |                |
|                                       | Deactivate   Pu<br>  None  | tonline   Put | offline   Delete         |                              |            | 17 HELP  | IMPORT      | EXPORT                   | AD<br>Previous | D NEW          |
| Name 🔺<br>Purple Sun                  |  | duct type 🗹   | Catalogs<br>Base catalog | Warehouses<br>WH1 Chicago    | Brand      | <b>Tax categories</b><br>Sales Tax > Standard Products | Is active   | Is online                | Action         | Detai          |
|                                       | None<br>Deactivate   Pu  | tonline   Put | offline   Delete         |                              |            | Pre  | avious Next | 1 showing 1<br>Items per | 1 to 1 (of 1   |                |

### 6.5.2. Additional resources

#### - Video presenting creating categories

Tab Configuration: <a href="http://www.youtube.com/watch?v=Nh5qFS5b8tQ">http://www.youtube.com/watch?v=Nh5qFS5b8tQ</a>

- Tab Localizations: <u>http://www.youtube.com/watch?v=p\_GjWKRSfOg</u>
- Tab Catalog > Categories: <u>http://www.youtube.com/watch?v=mwTo0eHK5qY</u>
- Tab Catalog > Prices: <u>http://www.youtube.com/watch?v=ExQyWrrLSKI</u>
- Tab Catalog > Upselling/cross-selling: <u>http://www.youtube.com/watch?v=fYSsgBEbXT0</u>

Tab Inventory: <u>http://www.youtube.com/watch?v=dbrH3qjS150</u>

#### - Online help

Tab Configuration Help:

http://www.magelia.org/documentation/adminconsole/Products.Products.Edit.configuration?help=t rue Tab Characteristics / attributes:

http://www.magelia.org/documentation/adminconsole/Products.Products.Edit.characteristics?help= true

Tab Localizations:

<u>http://www.magelia.org/documentation/adminconsole/Products.Products.Edit.localization?help=tru</u> <u>e</u>

Tab Catalog > Categories:

http://www.magelia.org/documentation/adminconsole/Products.Products.Edit.categories?help=true Tab Catalog > Prices:

http://www.magelia.org/documentation/adminconsole/Products.Products.Edit.prices?help=true Tab Catalog > Upselling/cross-selling:

http://www.magelia.org/documentation/adminconsole/Products.Products.Edit.associations?help=tr ue

Tab Inventory:

http://www.magelia.org/documentation/adminconsole/Products.Products.Edit.inventory?help=true

### 6.6. Generating the Catalog

There is one last step before we are finished: generating the catalog

#### Why update the data?

To improve performance of Magelia WebStore, the catalog data presented to the shopper is generated. This allows Magelia WebStore to improve its performance.

#### What happens during the updating of catalog data?

Even during catalog generation:

- Shoppers can continue to navigate the site

- Shopping carts are saved, but they are at risk of modification if the new catalog does not include the same prices or the same products.

### 6.6.1. Step by step procedure

#### **Prerequisite:**

There is no prerequisite for generating catalogs. This action is to be executed each time that a change has been made to products, categories, or prices.

Go to the screen Products > Data update and click the button "Update data"

| DASHBOARDS               | PRODUCTS CON                                   | NTENT TAX AND SHIPP         | ING SELLERS - STORES   | PLATFORM SETTINGS           | ~   |
|--------------------------|--|-----------------------------|--|-----------------------------|---|
| Products                 |  | Bulk edit                   | Product configuration  | Data Update                 |   |
| 🖶 Catalogs               | Suppliers                                      | S Inventory                 | Products types   |                             |   |
| Categories               | 🛨 Brands                                       | Prices                      | Product attributes   |                             |   |
| Products                 | Sales promotion                                | ns                          |  |                             |   |
|                          |  |                             |  |                             |   |
| Data Upd                 | ate  |                             |  |                             | P HELP UPDATE DATA                                  |
|                          |  |                             | re information needs to be ro<br>ich product list for prices, taxe |                             | orices, taxes, discounts, etc.Data Update Mechanism |
| To update product ar     | nd price information with                      | Data Update Mechanism:      |  |                             |   |
|                          | Ipdate Data button so<br>e-commerce website vi |                             | de in the administration con                                       | sole regarding catalogs, o  | categories, products, and prices are up-to-date and |
|                          | on « Update » will launci                      | h processes that will tempo | rarily compromise the perform                                      | ance of your infrastructure | . Please be careful when using this feature.        |
| <b>Warning!</b> Clicking |  |                             |  |                             |   |

This operation may last several minutes. Once the operation has finished, a message will inform you that the data has been successfully updated.

| DASHBOARDS PRO   | CONTENT   | TAX AND SHIPF   | PING SELLERS - STORES  | PLATFORM SETTINGS                                       |  |                                 |              |              |              |            | ~       |
|--|---|---|--|---|--|---------------------------------|--------------|--------------|--------------|------------|---------|
| Products   |   | Bulk edit   | Product configuration  | Data Update   |  |                                 |              |              |              |            |         |
|  | <ul> <li>Suppliers</li> <li>Brands</li> <li>Sales promotions</li> </ul>   | <ul> <li>Inventory</li> <li>Prices</li> </ul>   | <ul> <li>Products types</li> <li>Product attributes</li> </ul> | G   |  |                                 |              |              |              |            |         |
| Data update successfull  | lly complete.   |   |  |   |  |                                 |              |              |              |            |         |
| Data update successfull<br>Data Update   |   |   |  |   |  |                                 |              |              | 7 HELP       | UPDATE E   | DATA    |
| Data Updat<br>n e-commerce website is  | e made up of several pro  |   | information needs to be rapid                                  | dly displayed, such as price                            | s, taxes, discount                     | is, etc.Data U                  | pdate Mech   |              | - (          |            |         |
| Data Updat   | C<br>s made up of several pro-<br>culate each product list fo   | or prices, taxes, discou  | unts, etc.   | dly displayed, such as price                            | s, taxes, discount                     | is, etc.Data U                  | pdate Mech   |              | - (          |            |         |
| Data Updat<br>on e-commerce website is<br>iaving to constantly recalc<br>o update product and priv   | C<br>s made up of several pro-<br>culate each product list fo<br>ice information with Data<br>e Data button so that the                                     | or prices, taxes, discou<br>Update Mechanism:   | unts, etc.   |   |  |                                 |              | anism accele | erates perfo | rmance and | d avoic |
| Data Updat<br>n e-commerce website is<br>iaving to constantly recald<br>o update product and pri<br>Do click on the Update<br>via the service catalog                            | e<br>s made up of several pro-<br>culate each product list for<br>ice information with Data<br>e Data button so that the<br>g.                              | pr prices, taxes, discou<br>Update Mechanism:<br>modifications made                           | unts, etc.   | regarding catalogs, catego                              | ories, products, a                     | nd prices are                   | up-to-date c | anism accele | erates perfo | rmance and | d avoic |
| Data Updat<br>n e-commerce website is<br>iaving to constantly recold<br>o update product and prii<br>Do click on the Update<br>via the service catalog<br>Warning! Clicking on « | e<br>s made up of several pro-<br>culate each product list for<br>ice information with Data<br>e Data button so that the<br>g.<br>Update » will launch proc | or prices, taxes, discou<br>Update Mechanism:<br>modifications made<br>cesses that will tempo | unts, etc.   | regarding catalogs, categorance of your infrastructure. | ories, products, a<br>Please be carefu | nd prices are<br>I when using : | up-to-date c | anism accele | erates perfo | rmance and | d avoic |

If you have installed a demo store, you may now see the content of this store. To download the demo store, visit the page <u>http://www.magelia.org/page/demo</u> and click the button "Download the demo store." For the procedure explaining how to install the demo store, see the last section of this guide.

### 6.6.2. Additional resources

#### - Help section:

http://www.magelia.org/documentation/adminconsole/Products.DataBurst?help=true

This QuickStart guide introduced the essential features of Magelia WebStore. You have successfully configured a store, tax and shipping rates, a catalog, a category and a product and prices.

There are advanced features that we did not present here: the richness of the discount engine, the media library, brands, suppliers, etc. We suggest that you use the help files available from the administration console screens and that you visit the resources section of <u>www.magelia.org</u>

The services architecture of Magelia WebStore may be hard to understand because there is no website out of the box but only web services and administration console. This is a choice by design that makes Magelia WebStore multi-tenant, easy to integrate with  $1/3^{rd}$  party software such as Orchard and easy to use to build e-commerce apps, responsive design websites etc. If you want to see a basic website, please read and follow appendix 1 "How Do I View the Website Storefront?"

The Magelia Team is devoted to provide the .NET community with an advanced e-commerce software that is multi-tenant, multi-devices ready, extensible and features rich. So you can expect us to keep pushing hard and bring add additional features in the future. Whether you like Magelia WebStore not, your feedback is important to us so keep us informed.

To see the website storefront you just configured, please read the next section called "How Do I View the Website Storefront ?" In the previous sections, we configured the settings for an entire e-commerce store. This gives you a good idea of the basic functionalities in Magelia WebStore. We did not go into detail about all of the software's capabilities. To know more, visit the Resources tab on our website magelia.org.

Want to see more than the Admin Console in action? Take 2 minutes to install the free Demo Storefront

### 7.1.See a Demo Site or Install a Demo Site?

Magelia WebStore is composed of an administration console and a web services layer. This allows you to create websites featuring HTML, Flash, apps for mobile devices, and even sites in PHP or Java, and more.

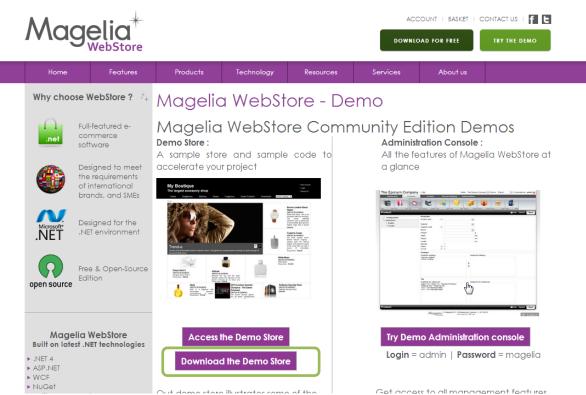
If you wish to see a demo store or configure a demo store without having to install this store, you merely need to use the demo sites and the administration console available for you on the site magelia.org at the address <a href="http://www.magelia.org/page/demo">http://www.magelia.org/page/demo</a>

If you wish to see your store settings on an internet site, you need to install an example site. We explain to you in what follows how to install this example site, which will allow you to see a site that resembles this, which applies taxes and shipping costs according to whether you're located in Illinois or elsewhere in the United States.

What follows is a technical installation procedure. This section is above all dedicated to developers and assumes that you already have access to the Visual Studio development environment.

# 7.2. Getting a Demo Site

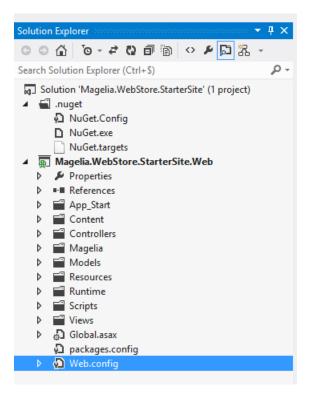
Simply go to the site Magelia.org and in the section "Try the Demo," click on the link "Download the Demo Store."



**Click on the link "Download the Demo Store" and save the file on your computer.** Unzip the file in the folder of your choice. Then open the solution Magelia.WebStore.StarterSite.sln with **Microsoft Visual Studio**.

### 7.3. Configuring the Demo Site

The solution appears in Visual Studio:



The address of Magelia WebStore Web Servies as well as the identifier of the store need to be configured in the section magelia/webstoreClient of web.config.

#### 1. Modify the Services Path

The attribute servicesPath corresponds to the address of Magelia web services. If you access the Magelia WebStore administration console via the following URL: <a href="http://localhost/admin/services/">http://localhost/admin/services/</a>. Http://localhost/admin/services/.

If you no longer remember the settings you used during the installation of the administration console, you can more than likely deduce them by looking at the address of the administration console and by adding /services/

#### 2. Modify the Store ID

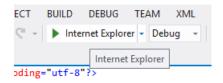
The attribute **storeId** corresponds to the unique identifier of your store.

## To locate it, go to the screen **Sellers – Stores > Store > Store Settings** The setting that interests us is found at the top of the screen, as shown in the following screen capture:

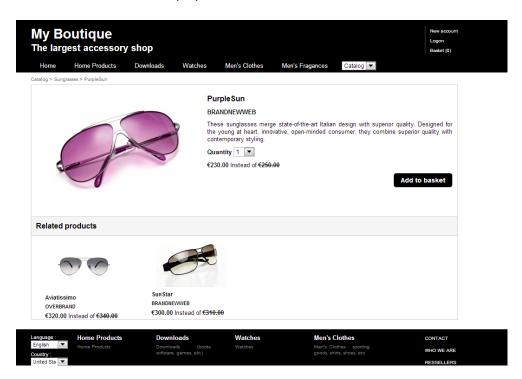
|  | CONTENT           | TAX AND SHIPPING         | SELLERS - STORES | PLATFORM SETTINGS                 |  |
|--|-------------------|--------------------------|------------------|-----------------------------------|--|
| Seller   |                   | Store                    | Users            | Data management                   |  |
| 🔥 Seller settings  | ats Customer sets | 🔒 Store settings         | L Users          | Task scheduler                    |  |
| 🔒 Stores   | 💂 Channels        | 🖳 Segments               | 💠 Roles          | 🐀 Import/Export                   |  |
| 🚯 Store configuration  | + Extensions      |                          | noles assignme   | nt                                |  |
| Properties   |                   |                          |                  |                                   |  |
| Code : *   | Default tax       | and shipping country : 🛛 |                  | s active :<br>2005-0800200c9a6) ⊄ |  |
|  |                   |                          |                  |                                   |  |
| Code : *<br>ponym Store  |                   |                          |                  |                                   |  |
| Code : *<br>ponym Store<br>StoreSettings :                           | United State      | es                       |                  |                                   |  |
| Code : *<br>ponym Store<br>StoreSettings :<br>ShortCacheDuration : * | United State      | es                       |                  |                                   |  |

### 7.4. Visualizing the Site

We have configured the settings at the web.config level, now you just need to run the project.



The demo site will then display:



# 8. Appendix 2 : Définitions

• **Brands:** In the management console, users can define product brands and associate a logo (an image) with these brands. A brand is simply defined by a name (non-localized) and a logo (image). The brands established in the management console will then be available in the product settings screen and will be able to be associated with a product during the product's creation. Users can thus easily group product display by brand name on their sites. Brands are defined at the vendor level, which enables several stores belonging to a single vendor to share brands.

• **Bundle:** A bundle is a collection of products that must be sold together as a package. Bundles contain a certain number of features which enable visually creating a specific product file (localized descriptions, images, etc.). Bundles in particular are defined as having a single price that is independent from the individual prices of the products that make up the bundle. Note: the stock of a bundle is defined in terms of the bundle as a whole and not in terms of each individual product in the bundle.

• **Carriers**: Carriers are the businesses that are in charge of delivering the merchandise from the warehouse to the final customer's delivery address. Carriers can, for example, be created to designate businesses like DHL, FedEx, UPS, etc. Magelia WebStore allows you to easily define carriers and assign them a name and a logo. When delivery fees are created, these fees will reflect the choice of carrier.

• **Catalog:** A catalog corresponds to a grouping of products sold on an e-commerce website. Catalogs share common parameters such as start and end dates, rules for calculating taxes, the currencies in which products can be sold, and shipping zones. For example, you can create different catalogs for winter and summer catalog, or separate catalogs to target consumers (B2C) and professionals (B2B). Product prices are created per catalog are defined by catalog, which allows applying different prices for the same product in different catalogs. The rules for calculating taxes in regards to prices are also defined in each catalog, which allows the prices to be displayed including or not including taxes. A catalog can also be associated with specific shipping zones, in order to restrict the sale of products in the catalog to only certain specified areas.

• **Category:** Categories allow for further organizing products inside of a catalog. Categories are hierarchical and Magelia WebStore allows vendors to define sections, subsections, and subsections of subsections, etc. The same product can be placed in several categories of a given catalog.

• **Currencies:** Currencies are monetary units used on a vendor's website. These currencies are identified by a name (which can be translated) and a symbol (e.g. \$, €, or CAD for Canadian Dollars). Currencies are defined at the global level, which enables all vendors and shops on the same Magelia WebStore server to use these currencies. You can select, however, for any given shop which currencies are accepted by their website. This makes it possible to create prices for each product in the different currencies accepted by the vendor.

• **Currency Conversion:** WebStore software does not manage the conversion between currencies. Magelia considers that most sellers define the price of their products in a set way for a given period of time, and that we at Magelia would not know how to conduct a currency conversion (i.e. knowledge of current exchange rates, rounding, etc.). However, it is possible to extend the Magelia WebStore software to make it possible to conduct a currency conversion.

• **Customer segment:** a Customer segment is a grouping of customers to whom you want to give advantages, such as exclusive promotions, for example.

• **Default Preferences for tax and shipping:** Upon landing on a website, a customer generally chooses a country of delivery but it is not always easy to know where the shopper wants to have goods delivered., if several tax zones or shipping zones exist within a country, you can indicate in Magelia WebStore which tax zone and shipping zone to use as the default preference for each country, if no additional information is available.

• **Differential Pricing Policy by Catalog:** The same product can have two different prices for two different catalogs. This is useful for preparing a catalog in advance and for indicating the prices that will be used when the catalog is available online.

• **Minimum Stock:** the minimum stock is important because when inventory of a product falls below the minimum stock, it can no longer be sold. A minimum stock of 0 allows the vendor to sell all the products in stock, whereas a minimum stock of 5 does not allow the sale of the last 5 available products in stock. Beware! It is possible to classify a minimum stock as negative in order to allow pre-orders of products that will soon be available.

• **Price = 0:** The price of a product must be greater than or equal to zero, and it can never be a negative. WebStore manages the absence of a price differently from a price equal to zero: if the price of a product is equal to zero, then this product would simply be considered as free by the Magelia WebStore.

- Price definition: the price of a product can be defined in all the currencies that are available in the catalog.
- Price: the price of a product or of a variant depends on the catalog to which the product or variant is assigned.

• **Prices Including and Not Including Taxes:** Vendors can select whether prices displayed on products include taxes or not. This is not managed at the level of the product but at that of the catalog. All prices in the same catalog will thus be listed as either taxes included or taxes not included. So for example, if a catalog is defined as taxes excluded, the defined price for a product in this catalog will not include taxes.

• **Product Attributes**: Magelia WebStore allows users to define the attributes of a product. Defining product attributes enable users to filter products by attribute and find more easily what they are looking for. It will also simplify creating product comparison pages, etc. Product attributes are useful for defining clothing size, shirt color, volume of a perfume, memory capacity of an mp3 player, etc.

• **Product Nature:** A product is defined in WebStore in terms of its nature. Magelia WebStore handles three product natures: standard products, product with variants (for example, a shirt available in different sizes) and bundles (a package of several products sold together such as a computer and a monitor). The nature of a product in the Magelia WebStore software serves to distinguish the applicable business rules during the product definition process. Thus, for example, a standard product would have only one SKU whereas a product with variants would have many, because each variant has its own SKU.

• **Product Type:** A product type enables vendors to group together attributes that define similar products, to indicate the product family, and to define rules about how products are managed in stock. For example, an mp3 player product type could be defined as a product with variants (its product nature), and include attributes like memory capacity (16 GB, 32GB, etc.) and color. When a product type is created, vendors also indicate how product stock is managed, making inventory management much easier. The Magelia WebStore software lets you differentiate between "classic" products that are managed in the inventory, classic products that are not managed in the inventory (like a download), and virtual products that are managed in the inventory.

• **Real Stock:** Real stock corresponds to the available merchandise that is actually in the warehouse. This stock is available so that the seller can manually manage the inventory. Sales do not affect the real stock level. Real stock is defined per seller and per warehouse.

• **Reordering Level (Formerly Maximum Stock):** This is a simple piece of information that enables the seller to make a list of products that are below the inventory level and the reorder level. This is an information-only data that does not affect the virtual or real stock. The reordering level is determined by seller and by warehouse.

• Seller or Vendor: a "seller" or "vendor" is a business or enterprise that conducts online sales (e-commerce). Vendors are able to create and launch several on-line stores and manage them all from a single WebStore server. All vendors on an identical Magelia WebStore technical platform must share the same data such as country, language and currency.

• **Shipping Fees:** Shipping charges correspond to price ranges defined for a carrier, the merchandise warehouse of departure, and the shipping zone. The shipping charges themselves can be subject to taxes and are therefore assigned to a tax category. It is possible to define the shipping charges based on the order amount, the product quantity, or the product weight. A description of these shipping charges can be defined in different languages.

• **Shipping Zones**: A shipping zone corresponds to a geographical area for which one or several modes of transportation will be proposed and for which shipping fees must be calculated. A shipping zone can correspond to a region smaller than a state, to a state or several states, to a country, or to a region larger than a country. WebStore is designed so that the delivery zones of your carriers can be easily configured. For example, it is easy to determine a "UPS zone 11" that corresponds to South Korea + Singapore + Thailand, and Turkey.

• **SKU (Stock-Keeping Unit):** This is a code or number reference for identifying a specific product. The SKU can correspond to an EAN code or a code set by the seller or vendor. No two products in WebStore can have the same SKU. The seller or vendor must organize his classification so that each SKU is unique.

• **Standard Product:** A standard product corresponds to a product that is not available in different sizes, colors, etc. A standard product has only one SKU and may have attributes.

• **Store/Shop:** A store or shop corresponds to an e-commerce website; all stores belonging to the same vendor must share the same global data.

• **Suppliers:** From the management console, it is possible to define suppliers and assign a logo. A supplier is simply defined by a name (non-localized). When creating products, you can assign a supplier to the product. The suppliers list is defined by the vendor, which enables several stores belonging to a single vendor to share suppliers.

• **Tax Category:** A tax category is associated with a tax type and corresponds to a product category where all the same tax calculation rules apply. Tax categories permit, for example, to determine products in Europe that are subject to the VAT standard rate or the VAT reduced rate, etc. You can also determine tax categories according to merchandise classifications, commodity codes, etc. Tax categories are easy to assign to products and enable Magelia WebStore to automatically calculate the taxes that apply to a certain product. Various tax categories can be assigned to a product in order to apply different taxes to the same product.

• **Tax Rate:** A tax rate is defined for merchandise of a category of given tax, from the departure tax zone (corresponding to the warehouse) and expedited towards a destination tax zone. This allows, for example, to easily defining that merchandise sent from California to Illinois, whose tax category is "Sales Tax" / standard product, would be subject to a tax of x%.

• **Tax Zones:** Tax zones determine where to apply taxes. A tax zone can be smaller than a country or state. This simplifies applying taxes to regions that have tax exceptions. For example, in the Magelia WebStore, it is easy to define a tax zone that corresponds to Spain and leaves surrounding territories (like the Canary Islands) excluded because they do not fall under the same tax regulations as the rest of the country

• **Types of Taxes:** A tax type is determined by an identifier and name. This enables the creation of taxes like the VAT in Europe and the sales and shipping tax in the United States. Beware! Tax types are determined in terms of the global platform and are therefore available for all sellers and all stores hosted on the same WebStore server.

• Variant Product or Product with variants or: A product with variants is a product that is offered in different variations. A good example is a perfume that would be available in different bottle sizes (.25FL OZ, 1 FL OZ, etc.). A product with variants does not have its own SKU because it is managed in terms of its varieties. Therefore, it would contain several SKUs and not only one unique SKU.

• Variant: A variant is a specific variation of a product. So an mp3 player offered in blue and in red consists of two variants (the colors) of the same product (the mp3 player). When a customer orders this product, he/she will choose from the possible variants in order to select the specific one that he/she wants to purchase. The product variant (the blue mp3 player for example) will have a SKU, a price and usually a stock.

• Virtual Stock: Virtual stock corresponds to the available stock on sale on a website. This is defined by product and by warehouse. The website relies on virtual stock and minimum stock to tell if a product is available or not for a customer. The website calculates the available stock for any given customer and takes into account the products that are already in the shopping carts of other customers. This system also takes into account whether the virtual stock is available in a warehouse serving the customer's shipping zone. If product "A" is only available in a warehouse that is located in the United States, but the vendor only sells to Europe from the European warehouse, then a customer in Germany cannot place an order for product "A". To determine if a warehouse serves a shipping zone, the system utilizes the definition of shipping costs (which are defined in terms of the origin and destination of merchandise). If no shipping rate is defined for delivery in Germany from the United States, then the products in a U.S. warehouse cannot be sold in Germany. Virtual stock is determined per seller and per warehouse.

• Warehouses and Physical Stores: Warehouses designate storage areas for merchandise. What we call warehouses in WebStore can also correspond to physical stores. This enables, for example, a chain of stores to classify each store as a warehouse and identify the stock of each product that exists in each store. Every warehouse is assigned to a tax zone. This is mandatory because certain sellers in European countries can choose to apply origin-based taxes. Warehouses are identified in terms of the seller and are therefore shared among the different stores of the same vendor.

During the order process, the calculation of the minimum stock is determined by accumulating the minimum stocks of the same product that is present in each warehouse. The minimum stock is determined per seller and per warehouse.

• Sales channel: a sales channel refers to the way the sale is made. For your company, you can define several sales channels corresponding to online internet sales, in-store sales, sales by phone, etc. This information can be used to classify orders via sales channel.

# Thank you for your interest in Magelia WebStore

You will find additional information, videos, and tutorials on Magelia's site

### www.magelia.org

You can also follow us on Twitter (<u>https://twitter.com/magelia</u>) and Facebook <u>http://www.facebook.com/pages/Magelia-</u> WebStore/286781414691120

