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Magento back-end practical exercices

In this article we will introduce you Magento back end, so you understand how things that you have seen in front end are managed by store owner in admin panel.

You can explore your fresh Magento install on your own and it is highly advised to do it, but below is a list of things for mandatory overview.

Mandatory set of tasks includes functionality store owner uses every day or more often. After you complete the article you will know majority of most frequently used tools in Magento back end.

For your conveniece tasks are grouped in 3 phases. Please, start with first and complete all three.

Note

if something does not work for you e.g. you do not get transactional e-mail, please move to the next step and submit error report to info@scandiweb.com

Support material

here is official Magento guide that you can look up for some things you need - download the Magento User Guide

Phase 1

Imagine you are a businessman, who sells digital cameras in United Kingdom. You want to create a web shop on Magento to sell your products.

Create a shop and fill it with content, set currency GBP, configure default payment and shipping methods and use default Magento one page checkout.

Creation of main content for the shop

Tip
You can try to make it by trial and error, but if you Google e.g. "how to create a bundled product in Magento" you will get official tutorial on that.

A) Create 10 new attributes for cameras, e.g. megapixels, manufacturer, color, material, etc.;

> **Note**
> Please use different attribute formats: multiple choice, text field, date, etc. Try all available solutions.

B) Create at least 5 categories for cameras shop;

C) Two of main categories should have 3 sub-categories each;

D) Create 5 products as Simple products, at least one with 4 images, every product has to have a description and attributes filled in;

E) Create one Configurable product e.g. color of camera can be different;

F) Create one Bundled product;

G) Create one Grouped product.

To familiarize yourself with back end options do the following actions:

① Register as a customer and make order with few items in front end

- Go to Sales section in back end, find your order and add one more product to it (imagine that real customer has called you and asked to add another product to the order);

- Create Invoice and Shipment for the order;

- See how Order Status changes and Order Information in the respective tabs (Invoices, Shipments) is updated;

- Check that you as a customer have received transactional e-mails when Order Status has been changed;

- Use Magento functionality to add comments to the Invoice and send them to customers e-mail, make sure you got all the e-mails.

② Create 3 customer groups & three customers for front end

- Set up product pricing in a way that each Customer Group has its own price;

- Log In on front end as a customer from each of the Customer Groups and see that your settings have effect.

③ Product pricing

- Set up tier pricing for Simple Product;

- Set up discount for certain Customer Group with 10%;

- Implement tier pricing feature with 3 steps/levels.

④ Add such attributes for your store that can be used in layered navigation and make a category, where layered navigation has at least 4 attributes that allows filtering apart from default one - price.

⑤ Sign up for newsletter and make one newsletter sent out from Magento back end.

Newsletter has to have text and images linking to products in the store.
Use "Lorem ipsum" text and images from Google.

Note

Probably Newsletter will not be received on email, because Cron has to be setup on the server.

⑥ Admin users

- Create one more admin user with full rights;

- Create one user that can only add new product, edit products, but not delete products;

- Create user that sees only Sales information.

Phase 2

Thank you for completing Phase 1. Imagine that now your business is successful, everybody likes your digital cameras and especially user friendly and functional web shop on Magento.

So, you decide to start selling your products in Germany. Naturally, you will translate your shop to German language and set prices in EUR.

You want the following things to be present at your shop:

A) Possibility to set different prices in GBP and in EUR in back end instead of Magento auto exchange;

B) You want customers who registered in UK store not being able to log in in German store;

C) Two different shops will be run on two different domains (or domain.com/shop1 domain.com/shop2);

D) UK shop will have the same categories as before, but German shop will have different category tree.

Think about what structure in terms of Websites / Stores / Store Views you will need.

Read this article for info: http://www.magentocommerce.com/knowledge-base/entry/overview-how-multiple-websites-stores-work/, but do not watch the video below the text.

Update of base content for the shop

A) Create different category tree (instead of translation you can just add GER after category name);

B) All products should have translated descriptions and titles (you can add GER to them);

C) Attributes and their values has to be translated as well (by adding GER).

Once you have set it up, do the following actions to further familiarize yourself with Magento back end.

⑦ Go to Promotions and create the following Price Rules

A) in Shopping Cart Price Rules

- When customer buys products X, he or she gets discount of EUR 10;

- When customer makes order for over EUR 500, he or she gets discount of 12%;

- When customer purchases product X and product Y, customer gets discount of 50% for product Z.
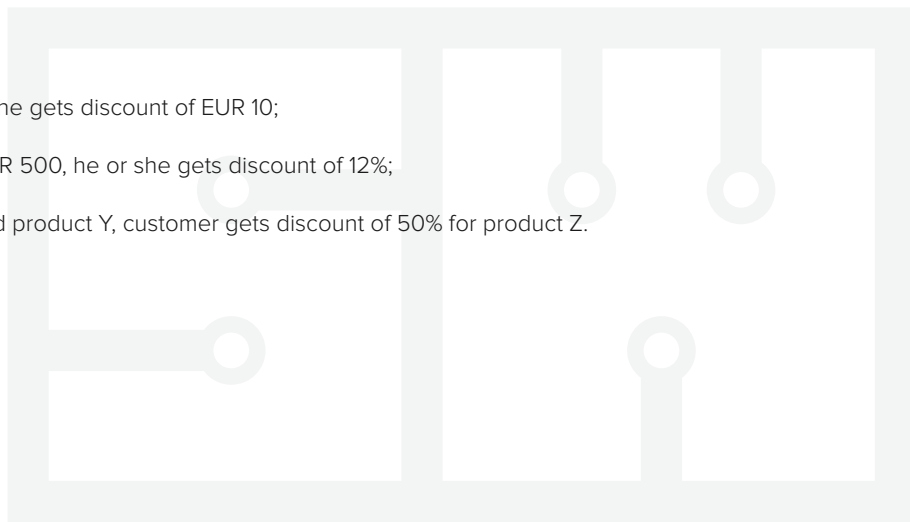
B) in Catalog Price Rules

- Make 10% discount for product of certain Color (if you did not have Color attribute, add it);

- Make 5% discount for products of certain category.

Note

You can make rules for products X, Y, in other words based on SKU or any other attribute, only if it is enabled in attributes settings in Catalog -> Attributes -> Manage Attributes

(8) CMS pages and Static Blocks, promo blocks in category

- Create new CMS page with "Lorem ipsum" text and add link to it in footer;

- Create a Static Block and publish it in left column on any page;

- Create SEO text for each category - use category description field in back end;

- Add category image to be published on category view page.

(9) Check the following functionality in back end

- Abandoned carts; what does it mean and what kind of information it provides to the store owner;

- Product cart; what it is provided for, how it can be used by the shop owner;

- Sales report, you can make some use of it after you will make some 5 orders for different products;

- Check bestsellers, most viewed products in the back end.

(10) Customers tab

- Create new customer from back end;

- Open some of exsiting customers, who made orders, got invoices, shipments and see what information is available about them in the back end;

- Log in as this customer on front end, add products to cart, make product review, add products to wishlist and see how this information X is updated in Magento front end and back end.

(11) Cache management and Index management (reindex)

- Prepare the answer on what is the difference between cache and index management;

- Configure such conditions that when you create a new attribute for layered navigation, fill it in in some products, it will not appear in front end in

- Layered navigation; make necessary changes so it will appear;

- Configure such conditions that when you create a product or an attribute for layered navigation, these will appear in front end automatically.

(12) Make back up of store database via back end
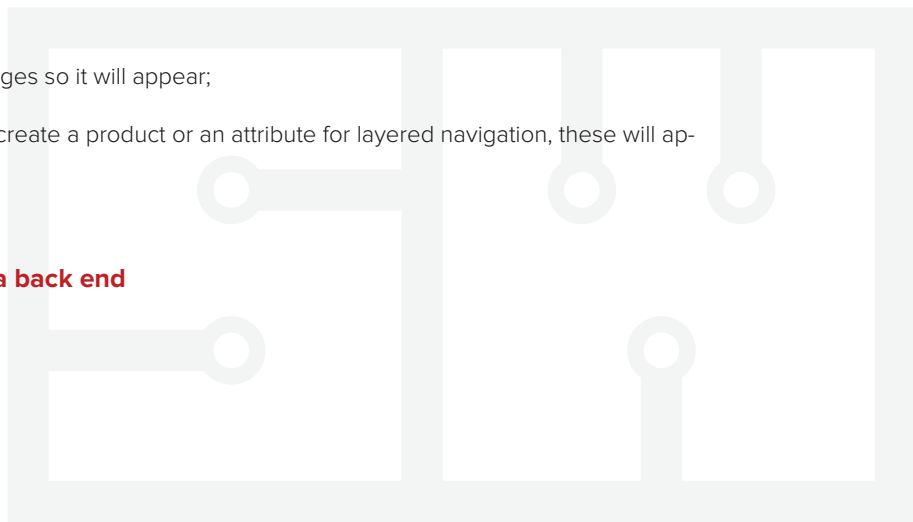
(13) **Make product export to Excel, change prices to +10% and make import back to the Magento store**

- Pay attention to how relation to websites and stores is imported;

- How relation to category or multiple categorie sis imported;

- How prices for different stores are stored

(14) **Sales tax**

- Try to set up 3 taxes to be applied to total of products   A) 5%,   B) 10%,   C) 22%.

Let first be "eco tax", second "import tax" and third "VAT". So, each product has base price e.g. 100 EUR and then you add these taxes one after another. Make sure that the tax in each country is different so you do not charge same VAT for UK and Germany.

Phase 3

After you launched your store in Germany you became really rich, but did not want to stop and decided to start selling notebooks.

With notebooks, you want to sell for UK and Germany in the same shop with the same prices, but customers can switch between different currencies in front end.

Langages will be different, but it will concern only interface - all product descriptions and attributes will be in English.

Also, the shop will be on the same URL. Category tree also will be the same for UK and Germany

Additional feature is that you want your notebook store to have modern theme from default Magento.

Again, think about your set up in terms of Websites / Stores / Store Views.

Update of base content for the shop

A) Create 5 new attributes for notebooks;

Note: please use different attribute formats: multiple choice, text field, date, etc. Try all available solutions.

B) Create at least 5 categories for notebooks shop;

C) Two of main categories should have 3 sub-categories;

D) Create 2 products as Simple products, at least one with 4 images, every product has to have description, and attributes filled in;

E) Create one Configurable product e.g. color of camera can be different;

F) Create one Bundled product;

G) Create one Grouped product.

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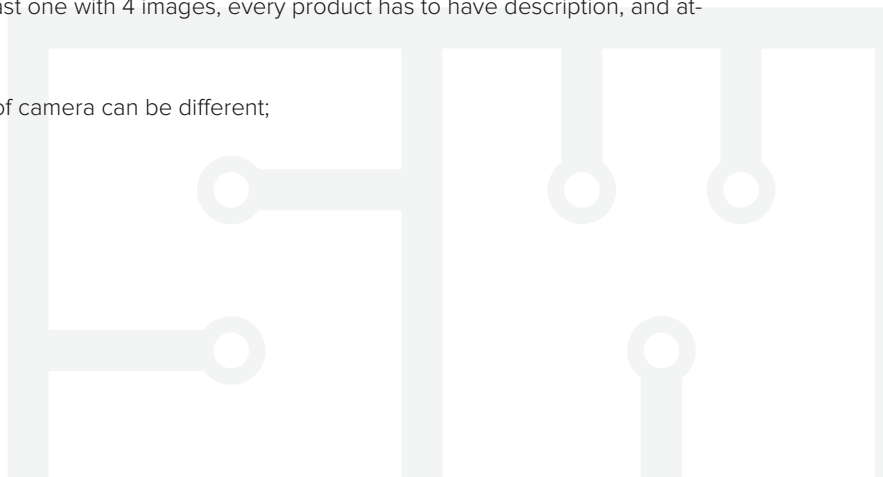
⑮ Inline translations

Now, please choose one of the Store Views and translate it using Magento Inline Translator. To save you time, you can translate only main menu or any specific CMS page.

You may use this short, but very clear tutorial: http://kb.magenting.com/content/13/71/en/enable-magento-inline-translation-feature.html

⑯ Magento extensions

Extensions have very important role for Magento CMS, so you should be familiar with installing and configuring them. And when you will be installing them, please try different methods - magento connect / .zip archive files.

A) http://inchoo.net/ecommerce/magento/facebook-connect-magento-extension/

B) http://support.addthis.com/customer/portal/articles/381234-addthis-for-magento

C) http://ecommerce.aheadworks.com/free-stuff/blog.html

After this is done, please do next steps to familiarize further with Magento back end:

⑰ Explore System > Configuration on your own

Relate what you already know to possibilities of configuration. Explore it on your own.

⑱ Cache

Go to backend, open any product, change price and save.

You will see message: "One or more of the Cache Types are invalidated: Blocks HTML output. Click here to go to Cache Management and refresh cache types."

It means that some pages content has to be updated after your changes.

Magento uses Cache to save page blocks content and send it to user without accessing database entries everytime.

Product price is shown on category page, product page and other pages, therefore, it is essential to update Cache content, so that user receives up to date price information.

If Cache is not updated, some users may see old information about product on the page.

And while you will be working on the Magento projects, you will often see old information on the page, because Cache is not Refreshed/Flushed.

Do not forget to Flush Magento cache (System -> Cache Management) everytime you make any changes to content.

During development also clean cache in the projectname/var/cache folder.
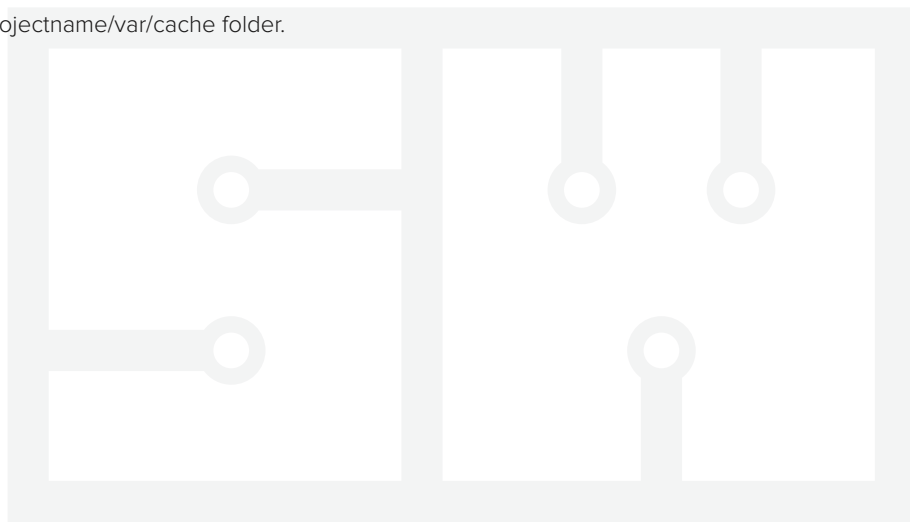
(19) Index

Please go to backend and create new attribute (Catalog > Attributes > Manage attributes) with any demo data.

You will see message: "One or more of the Indexes are not up to date: Catalog Search Index. Click here to go to Index Management and rebuild required indexes."

Similar to cache, Magento uses indexes in database for faster data loading.

In System -> Index Management you can see that there are different index tables used.

After you have created new attribute, there is new data in the database, therefore Magento needs to add new information in index tables, because exactly in

index tables Magento is looking for information about Product Data, URLs, etc. that is shown on the page.

If you do not reindex data, on the frontend some information like new attribute may be missing or search results will be not be up to date.

Please do reindex everytime you change some settings, create new products, attributes or pages. In other words, always do reindex if you have made some changes that add values to the database.

Based on the experience, developers and clients often send issues about wrong information on the frontend, because it is not equal to data in the backend. And in most situations the main reason is outdated Cache or Index tables.

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