VolunteerMatters

volunteer management made easy!

attract, empower, coordinate, and appreciate your volunteers

VolunteerMatters Wordpress Web Platform eStore Admin Guide

Version 1.1

by closerware

VolunteerMatters Wordpress Web: eStore Admin Guide

This VolunteerMatters Wordpress Web Platform administrative guide is broken up into four main areas:

I. Website (Pages, Posts, Files, etc)
II. eStore
III. Calendar
IV. Volunteer Portal (subscription based)

Administrative accounts for the VolunteerMatters Wordpress Web Platform are defined within your VolunteerMatters contact database (https://www.volunteermatters.net/vm) in a built-in custom field called "Website Roles". There are 5 different types of administrative accounts built in to administer to the VolunteerMatters Wordpress Web Platform that you can assign to contacts in the VolunteerMatters database:

- site_administrator
- site_calendar_manager
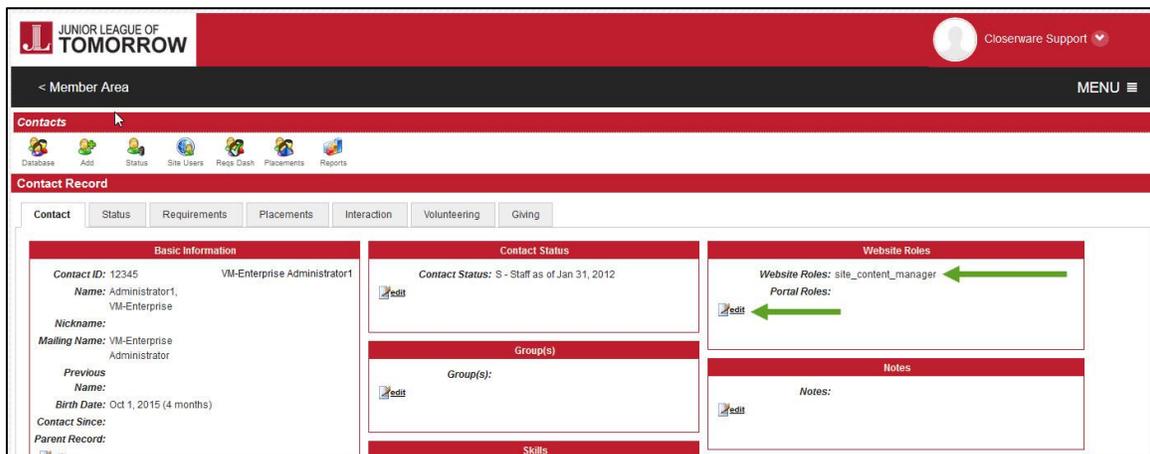- site_content_manager
- site_shopping_manager
- site_document_manager

The built-in roles are specifically for the administration of the following areas of the VolunteerMatters' Wordpress Web Platform:

1. **site_administrator** - Full site administrative access.

2. **site_calendar_manager** - Can administer the calendar. This includes creating/editing/deleting events as well as event permissions.

3. **site_content_manager** - Can edit any existing page content (including available homepage elements) as well as add/edit/delete any dynamic custom port types.

4. **site_shopping_manager** - Can administer the online store. This includes creating/editing/deleting product categories, items, coupons, etc. as well as item permissions and managing orders.

5. **site_document_manager** - Has control of the Document Management section in the backend.

To assign these roles to a member you will log into your VolunteerMatters administrative system (https://www.volunteermatters.net/vm) and select the "Admin"

link from the dropdown and then click on the "Database" icon ( ) to get to your contact database list (https://www.volunteermatters.net/vm/member/ContactList.do) and then navigate to the contact record you wish to add a role to and click on the "View

Record Detail" icon ( ). Then you will click the "Edit" button/link ( ) to edit the "Website Roles" custom field.

There you can select the "role" that the contact is supposed to have within your VolunteerMatters Wordpress Web Platform and the next time they log into the Website they will have those administrative abilities.

eStore

WooCommerce

The Closerware Wordpress Web Platform eStore is powered by the [WooCommerce plugin](#). WooCommerce is the world's most popular eCommerce WordPress solution. It allows you to add multiple categories and sub-categories as well as items (products) to any of these different categories or root shopping cart level. The shopping portlet cart is integrated with a PayPal Website Payments Standard account for automatic online payment transactions. You will just need to provide your PayPal account email address to Closerware Support.
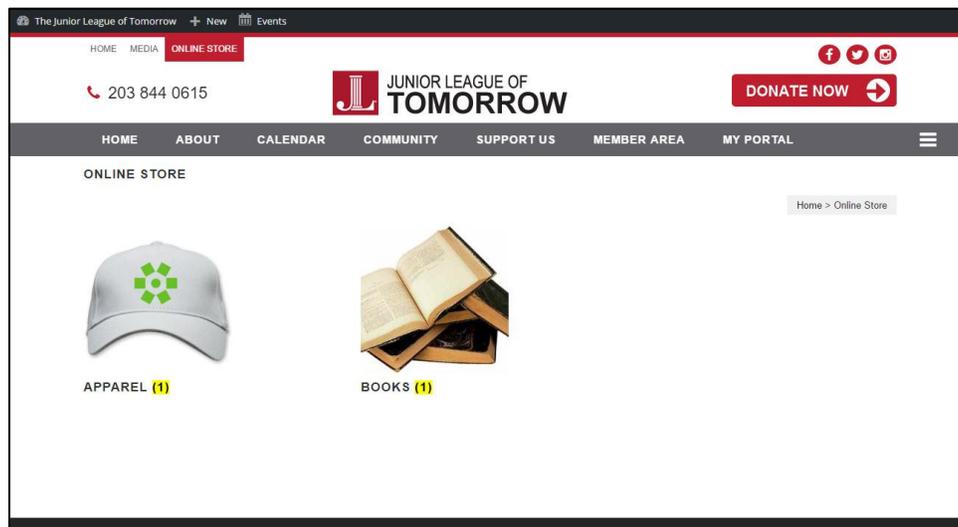
The shopping portlet also has baseline information for Taxation and Shipping calculations. These are configured by Closerware Support. You can email support@volunteermatters.com with your requested values. These values can then be used on the item level.

The options available for these baseline shopping plugin settings are as follows:

Taxation:

Please provide your Tax State and Tax Rate for your shopping portlet. This is typical pre-configured by Support.

Country Code [?]	State Code [?]	ZIP/Postcode [?]	City [?]	Rate % [?]	Tax Name [?]	Priority [?]	Compound [?]	Shipping [?]
US	CT	*	*	6.35	Tax	1	☐	☑

Insert row | Remove selected row(s) | | | | | | Import CSV | Export CSV

<u>Shipping:</u>

With Shipping, by default the system is setup with only a single shipping zone. If you would like we can specify shipping allowed outside the USA.

There are two shopping methods designated for the USA Shipping Zone:

- **Flat Rate** - Lets you charge a fixed rate for shipping.
- **Local Pickup** - Allow customers to pick up orders themselves. By default, when using local pickup store base taxes will apply regardless of customer address.

There is an additional method that we can add if desired called "**Free Shipping**".   It is a special method which can be triggered with coupons and minimum spends.

Flat Rate

With Flat Rate shipping, a "Cost" is configured. It is applied to entire cart.

The Cost field allows you to charge a flat rate per item, a percentage based cost or a minimum fee.

Available placeholders:

   [qty] – Number of products in the cart
   [fee] – An additional fee. This fee has two optional arguments.
      percent – A percentage based on total order cost.
      min_fee – A minimum amount. Useful when using percentages.

Examples

   10 + (2 * [qty]) – A base shipping cost of $10 plus $2 for each item in the cart.
   20 + [fee percent="10" min_fee="4"] – A base shipping cost of $20 plus 10% of the order total, which is at least $4.

You will need to provide your desired flat rate to Closerware support.

Local Pickup

Local Pickup is a method that allows the customer to pick up the order themselves.   If desired we can also disable "Taxes" on local pickup (if configured on shipping) and assign a cost. The cost is configured identical to Flat Rate above.

Free Shipping

Free shipping is a great way to encourage customers to spend more. For example, offer free shipping on orders over $100.

If used we can configure free shipping using the following options

- N/A – Not available, Free Shipping is an option for all customers
- A valid free shipping coupon – A coupon created that enables free shipping
- A minimum order amount (defined below) – Set the amount in the Minimum Order Amount field.
- A minimum order amount OR a coupon
- A minimum order amount AND a coupon

You will need to contact Support to implement these on your behalf.

Shipping Classes

Shipping classes can be used to group products of similar type and used by some shipping methods, such as Flat Rate Shipping, to provide different rates to different classes of product.

For example, with shipping classes and Flat Rate Shipping, it's possible to create different flat rate costs heavy items and envelopes. Visit Flat Rate Shipping at WooCommerce for more information.

Shipping classes are used to group products – they are not used directly to offer shipping rates to customers.

By default there are NO shipping classes created.

For more shipping options available to you please review the following page within Woo-Commerce: https://docs.woothemes.com/document/setting-up-shipping-zones/

**Managing Product Categories, Tags and Attributes**

Product Categories

You can create as many eStore categories and subcategories as you wish within the Shopping plugin. eStore categories are *ALWAYS* public. Only products can be made member only. To manage eStore categories on your website, you will need to login to

the website with appropriate credentials.   The login location will depend on your website theme for its location.
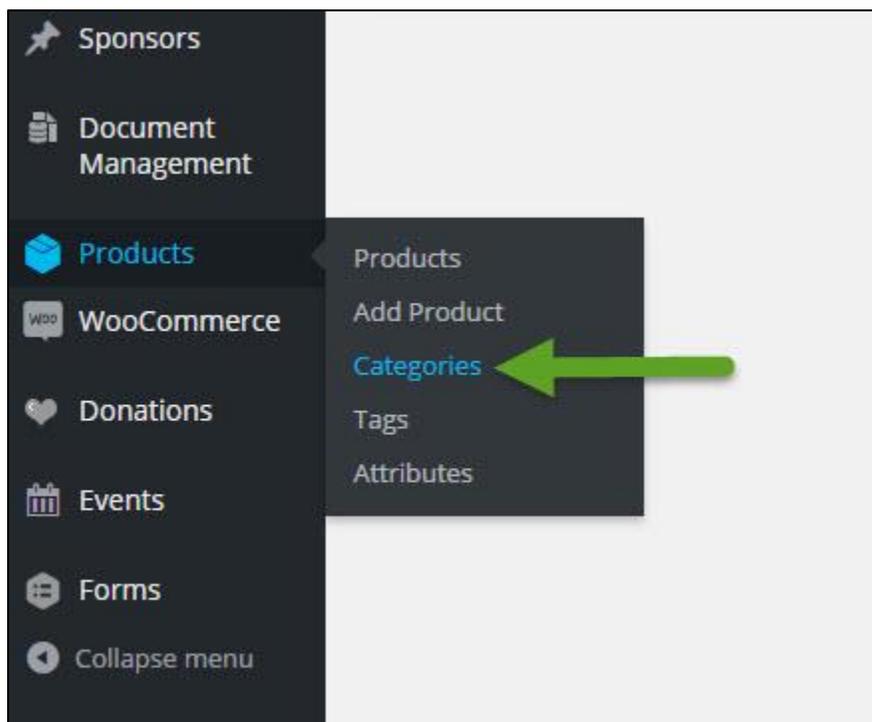
Once you successfully login in with the proper administrative privileges the screen will now include an "Admin Bar" at the top of the screen.

There are multiple methods for adding a new estore cateogory but all lead to the same page.
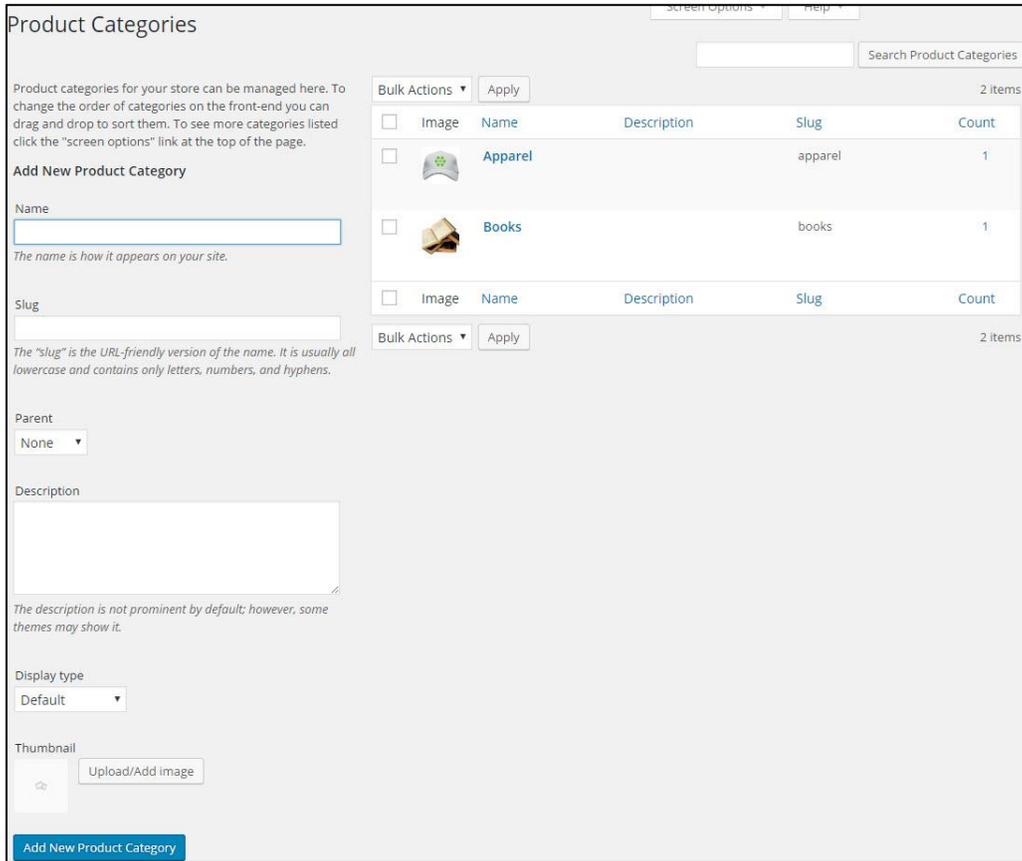
Click on the "Admin Dashboard" link to enter the administrative area of the website.
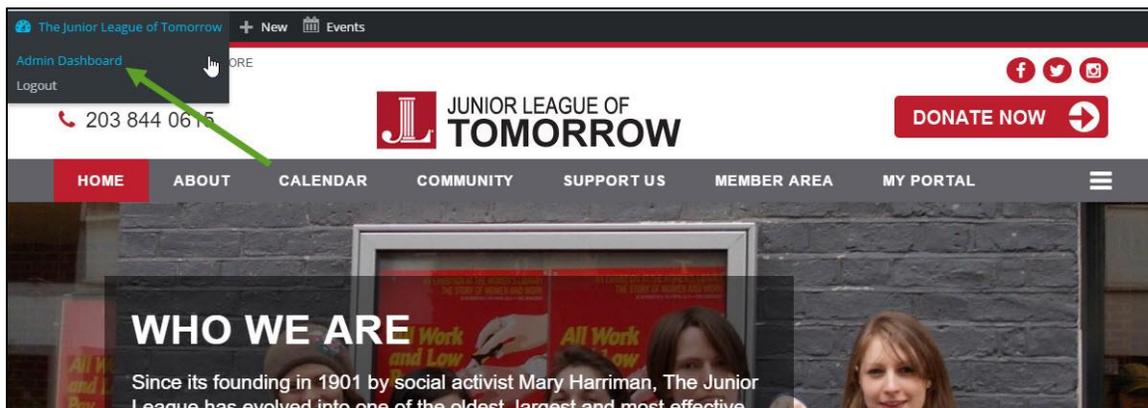
Then hover the cursor over the "Products" menu entry and then click on "Categories".

This will show you existing product categories as well as the ability to add new categories.

Categories can also be reordered by dragging and dropping – this order will be used by default on the front end whenever the categories are listed. This includes both widgets and the subcategory view on product pages.

When you add a new product through Products > Add Product, you'll be able to select this new product category from the list.

When adding a category you can set the following fields:

- **Name** - The name is how it appears on your site.
- **Slug** - The "slug" is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.
- **Parent -** This is only for subcategories
- **Description -** The description is only shown when you are in a product category
- **Display Type -** Here you can set how you want items within the category to display: Products, Subcategories, or Both.
- **Thumbnail -** Add an image for your product category

You can edit or delete an existing category from the main category page by hovering over the category and selecting the proper link.

Product Tags

Tags are another way to relate products to each other, next to product categories. Tags can be added similarly to adding product categories, and work in exactly the same way as post tags.
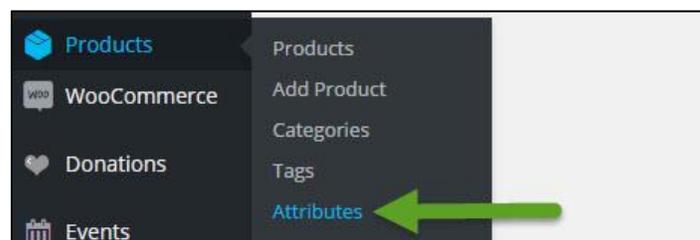
Product Attributes

Attributes are pieces of data that are a key component of authoring variable products.

Say you're opening a clothing store, selling all the latest fashions. In this case, a top level product category will most likely be "Clothing", inside of which, the majority of your catalog will reside.

Now, you could very easily create multiple products for different sizes, colors and so on, but this information is better suited as attributes. Why? Because a user can select concurrent attributes on a single product as opposed to administrator creating multiple products.

It's recommended that you set up any attributes you will use over and over in this way. For example: size, colors, meal selections, etc.

To create an attribute you will navigate to Products > Attributes

There you'll find the following screen:

Here you can quickly and easily add attributes and their terms.

You also have the option to create attributes on a per product basis. This is useful should you want to display extra information about a product that is unlikely to apply to another.

When adding an attribute you can set the following fields:

- **Name** - Name for the attribute (shown on the front-end).
- **Slug** - Unique slug/reference for the attribute; must be shorter than 28 characters.
- **Enable Archives** - This is an advanced functionality that you can ignore
- **Type -** Determines how you select attributes for products. Under admin panel -> products -> product data -> attributes -> values, Text allows manual entry whereas select allows pre-configured terms in a drop-down list.
- **Default Sort Order -** Determines the sort order of the terms on the frontend shop product pages. If using custom ordering, you can drag and drop the terms in this attribute.

Once you add the attribute you will then need to add the "Terms". These are your options.   To configure "Terms" click on the "Gear" link to the right of your attribute.
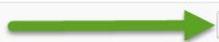
This will bring you to the terms page of your attribute.

When adding a term you can set the following fields:

- **Name** - The name is how it appears on your site
- **Slug** - The "slug" is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.
- **Parent** - This allows you to set a sub term
- **Description** - This will only show on the admin dashboard

Attribute terms can be ordered by Name, Name (Numeric), Term ID or based on a custom order you decide (by dragging and dropping the terms in the list when configuring the terms).

Note: Deleting a term will remove it from all products and variations to which it has been assigned. Recreating a term will not automatically assign it back to products.

Editing/Deleting

You can edit or delete an existing attribute from the main attribute page by hovering over the attribute and selecting the proper link.

For more information on Managing Product Categories, Tags and Attributes please review the following page and video within Woo-Commerce: https://docs.woothemes.com/document/managing-product-taxonomies/

Please note that some aspects of WooCommerce are only available to Closerware Support.

Adding and Managing Products

With attributes and categories set up and stock management configured, we can begin adding products. When adding a product, the first thing to decide is what type of product it is.

- A **Simple product** type covers the vast majority of any products you may sell. Simple products are shipped and have no options. For example, a book.
- A **Grouped product** is a collection of related products that can be purchased individually and only consist of simple products. For example, a set of six drinking glasses.
- An **External or Affiliate product** is one that you list and describe on your website but is sold elsewhere.
- A **Variable product** is a product that has variations, each of which may have a different SKU, price, stock option, etc. For example, a t-shirt available in different colors and/or sizes.

To add a new version of any of those products above to your website, you will need to login to the website with appropriate credentials. The login location will depend on your website theme for its location.

Once you successfully login in with the proper administrative privileges the screen will now include an "Admin Bar" at the top of the screen.
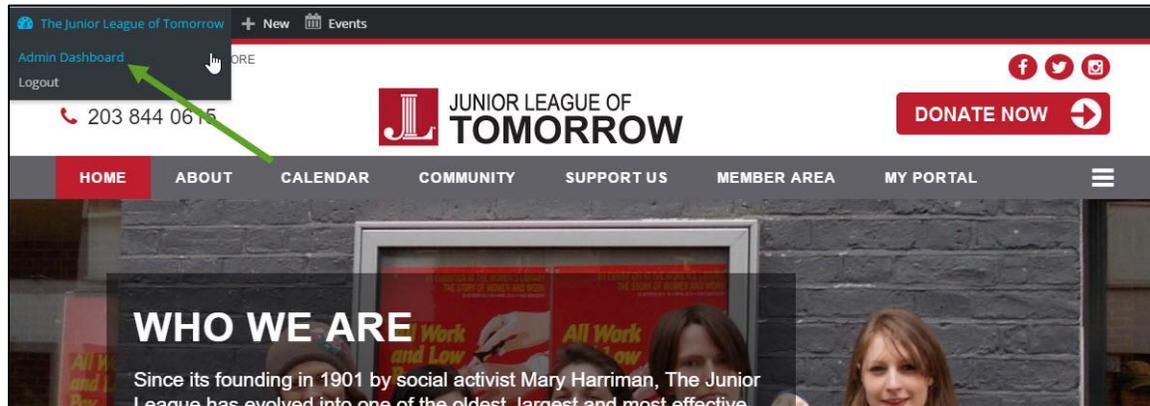
There are multiple methods for adding a new estore product but all lead to the same page.

Click on the "New" link in the Admin Bar and select "Product" from the drop down. This will take you to the "Add New Product" editor.
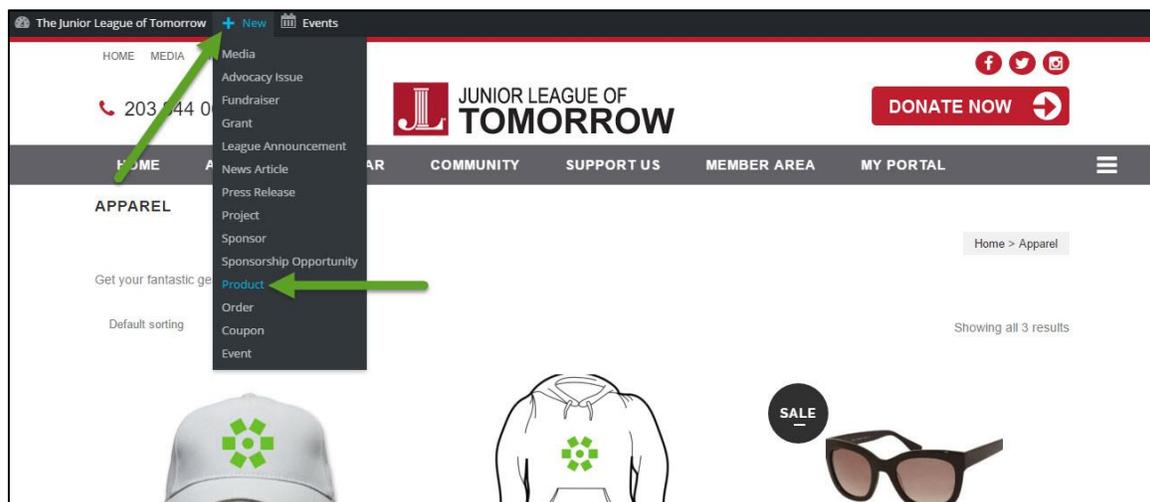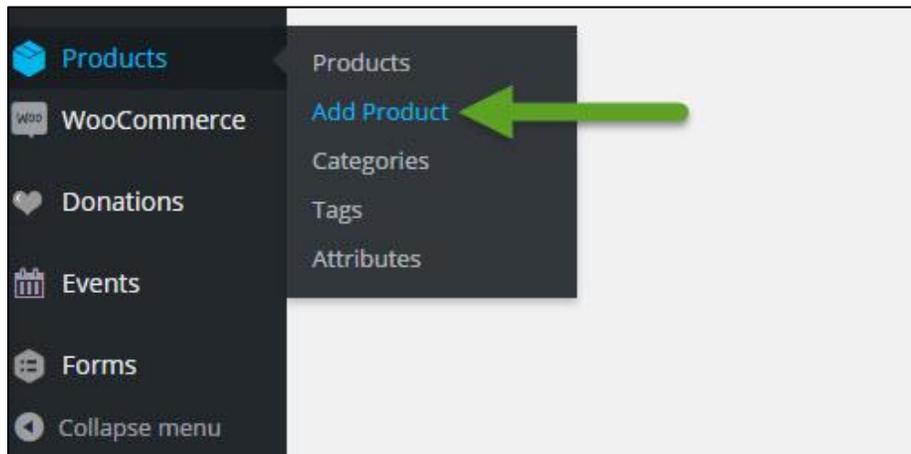
or

Click on the "Admin Dashboard" link to enter the administrative area of the website.
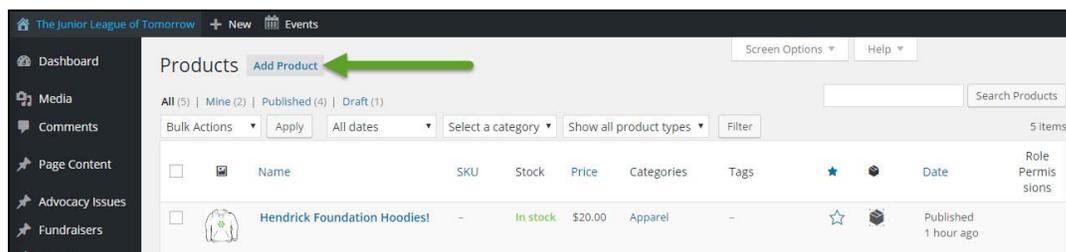

Then click on the "Products" menu entry and then click "Add Product".   The "Add Product" will also appear when you hover the cursor over the "Products" menu entry in the left hand side menu.


or

When you are on the listing of products or editing a product there will be an "Add Product" button.

Once you have used one of those methods to create a "New" product, you will be taken to the "Add New Product" editor page. Similar to a lot of other post type creation pages, the Screen Options will allow you to remove unnecessary elements.

Here is a screenshot of the blank "Add New Product" editor page.
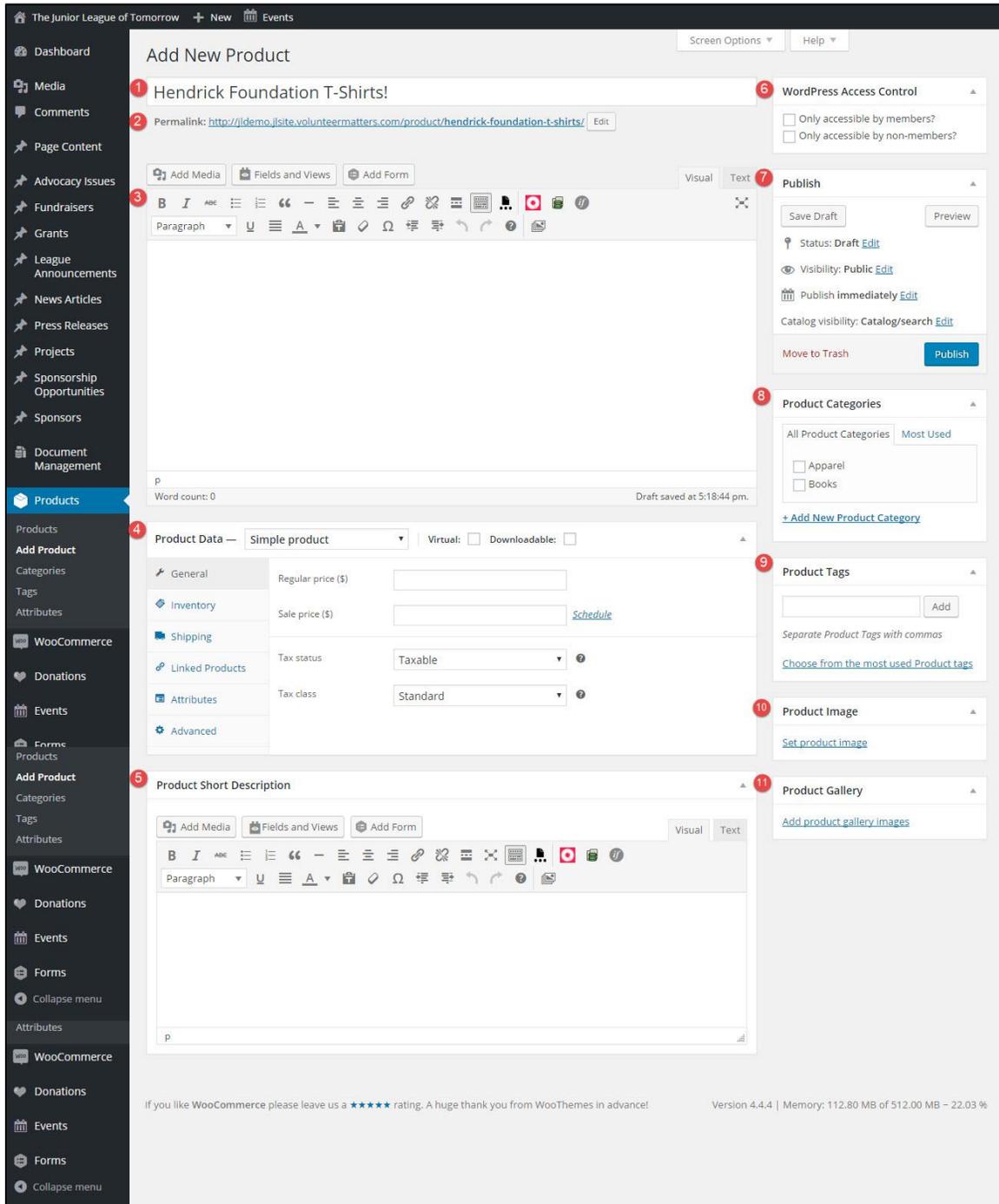
Depending on what you have removed via the Screen Options, the typical elements needed for adding a product are the following

1. **Product Name**
   The name of your product. You can use any phrases, words or characters. Note: using the same title twice (either manually or copying) will result in a sequential number being added to the slug/permalink. You can use commas, apostrophes, quotes, hypens/dashes and other typical symbols in the event title like "My Site - Here's Lookin' at You, Kid". WordPress will then clean it up to generate a user-friendly and URL-valid name of the event (also called the "post slug") to compose the permalink for the event.

2. **Permalink**
   Permalink stands for "permanent link". That means a product URL that contains a user-friendly event name derived from the product name which could change, although not recommended, but in a more controllable way. This product name (also referred to as "product slug" or just "slug") can be edited. The permalink is automatically generated based on the name you set to the product and is shown below the name field. Punctuation such as commas, quotes, apostrophes, and invalid URL characters are removed and spaces are substituted with dashes to separate each word. If your title is "My Site - Here's Lookin' at You, Kid", it will be cleaned up to create the slug "my-site-heres-lookin-at-you-kid". You can manually change this, maybe shortening it to "my-site-lookin-at-you-kid".

3. **Body Copy Box - Long Description**
   The blank box where you enter your writing, links, links to images, and any information you want to display on your product's long description. **<u>NOTE: This information by default is minimized and only displays when the visitor clicks on the "Additional Information" box on the product page.   Typically this is only needed for a small number of products and you will use the "Short Description" box for any product content</u>.** When writing your product, you have the option of using the Visual or Text mode of the editor. The visual mode lets you see your product description as is, while the Text mode shows you the code and replaces the WYSIWYG editor buttons with quicktags buttons.

4. **Product Data Meta Box**
   This is where the majority of important data is added for your products. Including the product type (simple, group, etc.), pricing, stock, variations, etc. We will handle the different product types and options below.
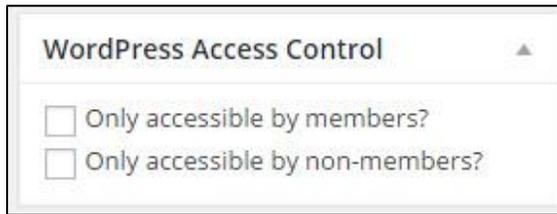
5. **Body Copy Box - Short Description**
   The blank box where you enter your writing, links, links to images, and any information you want to display on your product's description. This content is

displayed on the product page. When writing your product, you have the option of using the Visual or Text mode of the editor. The visual mode lets you see your product description as is, while the Text mode shows you the code and replaces the WYSIWYG editor buttons with quicktags buttons.

6. **Wordpress Access Control**
This element determines if the product is Member only or Public. If it is a member only element, you will check "Only accessible by members?" otherwise by default it is a publicly available product.

Reminder: Only products are Member Only, categories themselves are always public.

7. **Publish Box**
There are 4 main elements in this box: Status, Visibility, Published, and Catalog Visibility.

Status can be "Published", "Pending Review", or "Draft". For products, this should remain as "Published" if you want it live on the website or Pending Review or Draft to make it only available on the Admin Dashboard.

Visibility - This determines how your product appears to the world. Public products will be visible by all website visitors once published. Password Protected products are published to all, but visitors must know the password to view the product content. Private products are visible only to you (and to other editors or admins within your site)   FOR THE MOST PART YOU WILL ALWAYS LEAVE AS PUBLIC AND MEMBER ONLY PRODUCTS WILL BE DESIGNATED BY WORDPRESS ACCESS CONTROL.

Published will show the date/time the product was created.

For the most part you will only click the "Publish/Update" button in this box to either publish your products the first time or to update your product. I would recommend the "Preview Changes" button before clicking the "Publish/Update" button.

This opens up a new browser window of the event to allow you to review the new product or any changes to an existing product before committing them.

Catalog Visibility - you can set catalog visibility for your product.
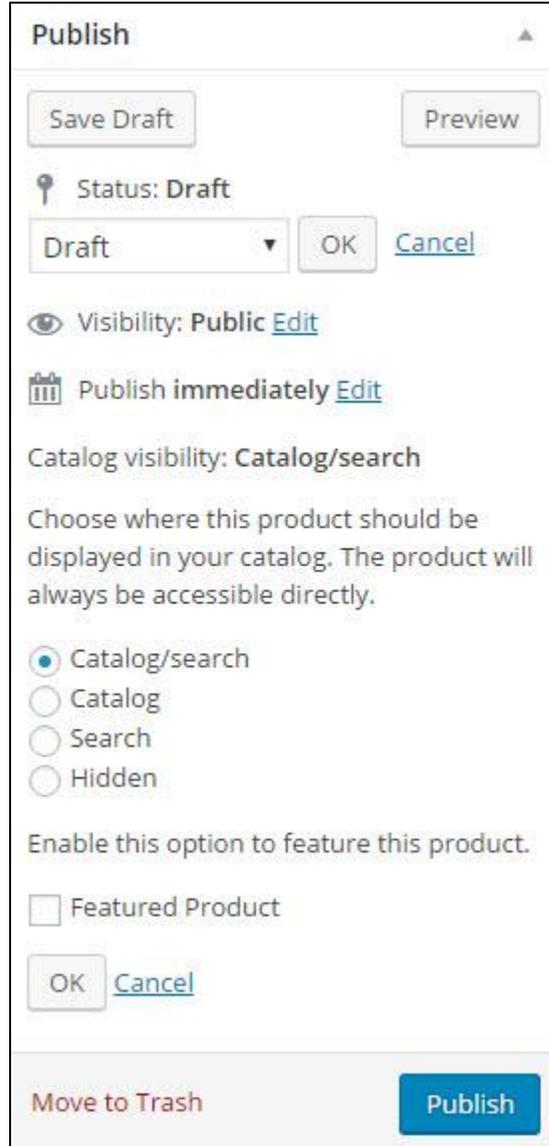
- **Catalog and search** – Visible everywhere, shop pages, category pages, & search results.
- **Catalog** – Visible in shop pages & category pages, but not search results.
- **Search** – Visible in search results, but not in the shop page or category pages.
- **Hidden** – Only visible on the single product page – not on any other pages.

8. **Product Categories**

Generally categories serve as filters to group together all the related posts in one place. This is also the function of categories in WooCommerce, but this time categories are used to group together all the related products so as to provide convenience to your customers. For example, the category for T-shirts will contain all sorts of T-shirts, the category for caps will contain all sorts of caps, and so on. You can add additional product categories as needed from the Categories section under Products in the Wordpress Dashboard.

9. **Product Tags**

If you are uploading any content on the internet then you should make sure that visitors are able to search it. Tags provide this opportunity to visitors.

The WooCommerce product tags will work in a similar fashion to custom post tags. Here you may enter the relevant tags, each separated with a comma, and then click the Add button. I'd recommend that you don't stuff your posts with a lot of tags. There is a general rule of adding up to three tags per product. In case you want to remove a tag from a particular product, simply go to its editing page in your WordPress dashboard and locate the meta box for Product Tags. Hover your mouse on the cross sign which appears with every tag. The cross mark will appear red. Simply click it and that particular tag disappears. Then update or publish your product.

10. **Product Images**

The Featured Image is the main image for your product. It is displayed in your product loops (i.e., product categories, up sells, related products, etc.) and serves as the focus in the image gallery of your product details page. After clicking the "Set product image" link follow the same steps as inserting images in other custom post types. Once you have selected the product image and determined the image settings, click on the blue "Set product image" button, to set it as the featured image for your product.

11. **Product Gallery**

Product galleries display all images attached to a product through the Product Gallery meta box.

You can create a product gallery using the same method as adding a featured image, but using the Product Gallery meta box. Images in the product gallery can be re-ordered easily via drag and drop. Simply re-order your images by moving them around.


To remove an image from the product gallery, hover over the image and click on the red "x". Then update or publish your product.

Adding a simple product ([online video](#))

A simple product is the most common product and the one you will be using 90% of the time.

Adding a simple product is similar to writing a custom post type in WordPress. After you have followed the above steps to "Add Product" and have been take to a blank "Add New Product" editor page. You will go through the process of adding the product title, slug/URL, Short Description, Wordpress Access Control, Product Categories, images, etc..

Under the "Body Copy Box - Long Description" is the "**Product Date Meta Box**". The Product Data meta box is where the majority of important data is added for your products.
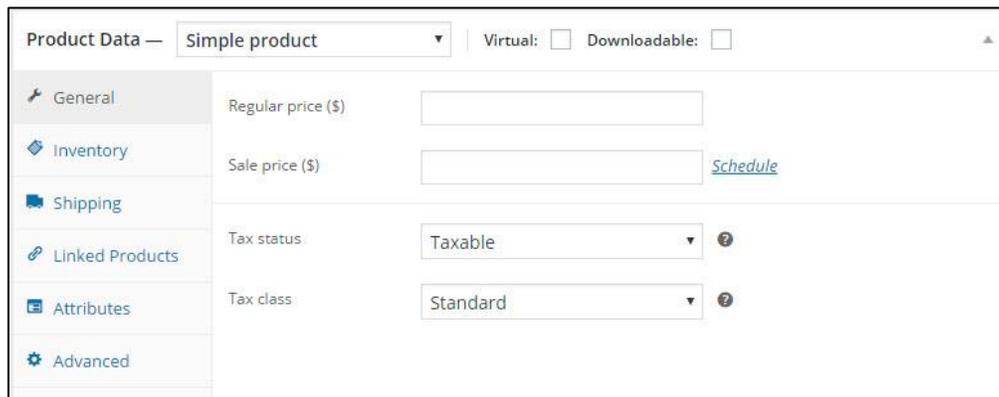
Here you will select the product type and configure if the product is "Virtual" (*does not require shipping*) and/or is "Downloadable" (downloadable products give access to a file upon purchase).
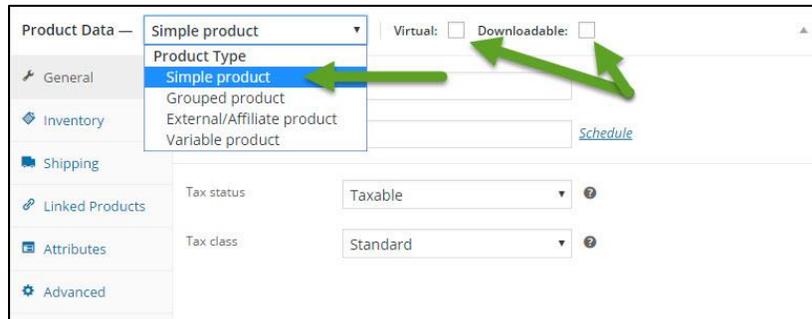
There are potentially six sections available to be configured: General, Inventory, Shipping (optional), Linked Products, Attributes, and Advanced.

NOTE: If you check that the product is "Virtual", the "Shipping" section will not display.
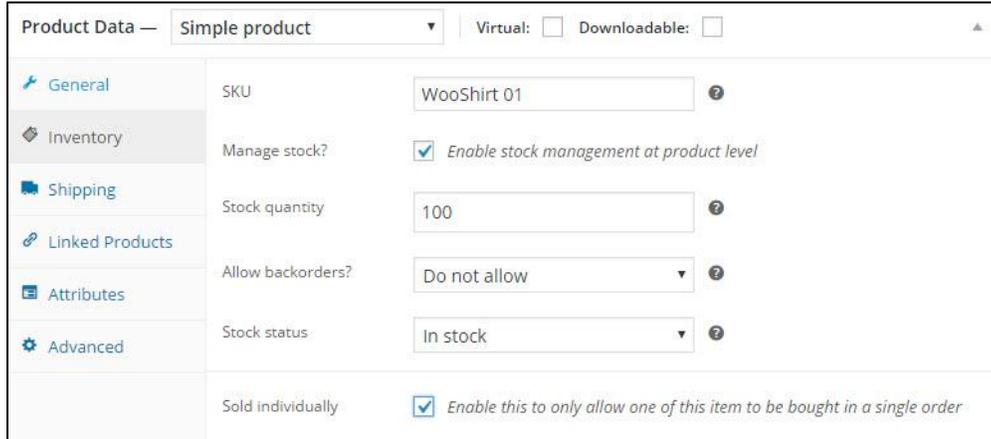
General Section:
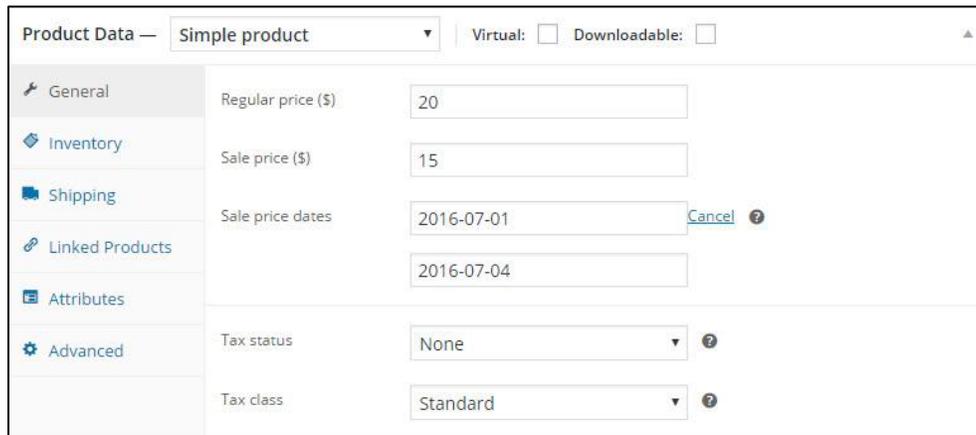
Price
   o Regular Price – Item's normal/regular price.
   o Sale Price – Item's discounted price that can then be scheduled for certain date ranges.

Tax Status - Define whether or not the entire product is taxable, non-taxable, or just the cost of shipping it.

Tax Class - Choose a tax class for this product. Tax classes are used to apply different tax rates specific to certain types of products. In 99.9% of cases, you want to use the default "standard" class. If you sell goods that require a different

tax class (i.e., Tax, except zero-rated products) you will need to contact Closerware Support to add the classes. We include Standard, Reduced Rate and Zero Rate tax classes.

Inventory Section:

The inventory section allows you to manage stock for the product individually and define whether to allow back orders and more.

SKU – Stock keep unit (SKU) tracks products. Must be unique and should be formatted so it does not match any post IDs. For example, post IDs are numbers so a SKU could be WS01. That could stand for WooShirt 01.

Manage Stock - Select whether or not the product has a limited number of inventory. If there is no product and it is an intangible product such as dues, you can just uncheck.

Stock Quantity - Enter the number of available inventory of the product in question. If this is a variable product this value will be used to control stock for all variations, unless you define stock at variation level.

Allow Backorders - If managing stock, this controls whether or not backorders are allowed. If enabled, stock quantity can go below 0.

Stock Status - Controls whether or not the product is listed as "in stock" or "out of stock" on the frontend. This will typically be set automatically once stock is depleted. This allows an administrator to override.

Sold Individually - Checking the Sold Individually checkbox limits the product to one per order.

Shipping Section:

These need to be set if your shipping calculation is based on item size.   The current setup does not include that option. These can be ignored for the most part but can be entered for informational reasons.

Weight – Weight of the item.
Dimensions – Length, width and height for the item.
Shipping Class – Shipping classes are used by certain shipping methods to group similar products.

Linked Products Section:

Using up-sells and cross-sells, you can cross promote your products. They can be added by searching for a particular product and selecting the product from the dropdown list. After adding them, they are listed in the input field.

Up-sells - Displayed on the product details page. These are products that you may wish to encourage users to upgrade; based on the product they are

currently viewing. For example, if the user is viewing the coffee product listing page, you may want to display tea kettles on that same page as an up-sell.

Cross-sells - Products that are displayed with the cart and related to the user's cart contents. As an example, if the user adds a Nintendo DS to their cart, you may want to suggest they purchase a spare stylus when they arrive at the cart page.

Grouping – Use this to make a product part of a grouped product. See the Grouped Products section below for more information.

Attributes Section:
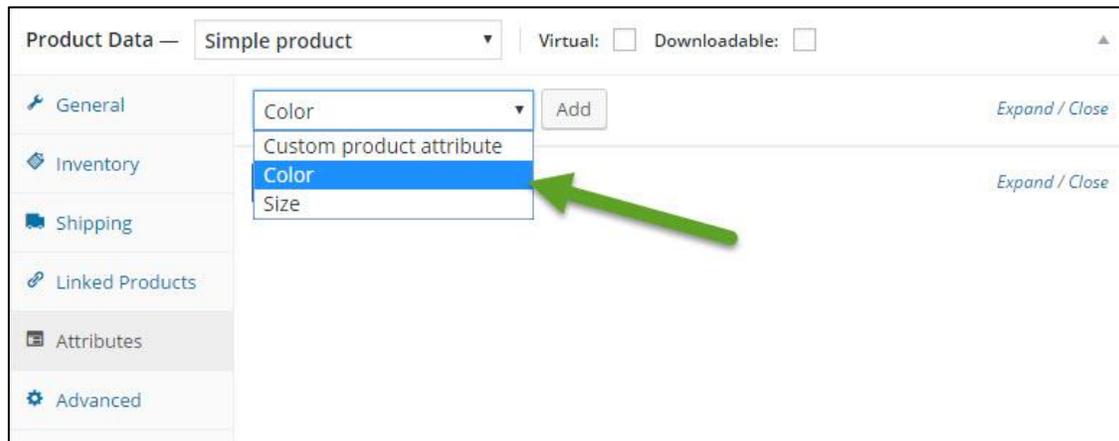
On the Attributes tab, you can assign details to a product. You will see a select box containing global attribute sets you created (e.g., platform). See the section "Managing Product Categories, Tags and Attributes" above for more information.

Once you have chosen an attribute from the select box, click "Add" and apply the terms attached to that attribute (e.g., Nintendo DS) to the product. You can hide the attribute on the frontend by leaving the "Visible on the product page" checkbox unticked.

Custom attributes can also be applied by choosing 'Custom product attribute' from the select box. These are added at the product level and won't be available in layered navigation or other products.

NOTE: When creating a simple product you really do not need to enter anything on this tab. This will be used in the "Variable Product" that will be described further in this guide.

Advanced Section:
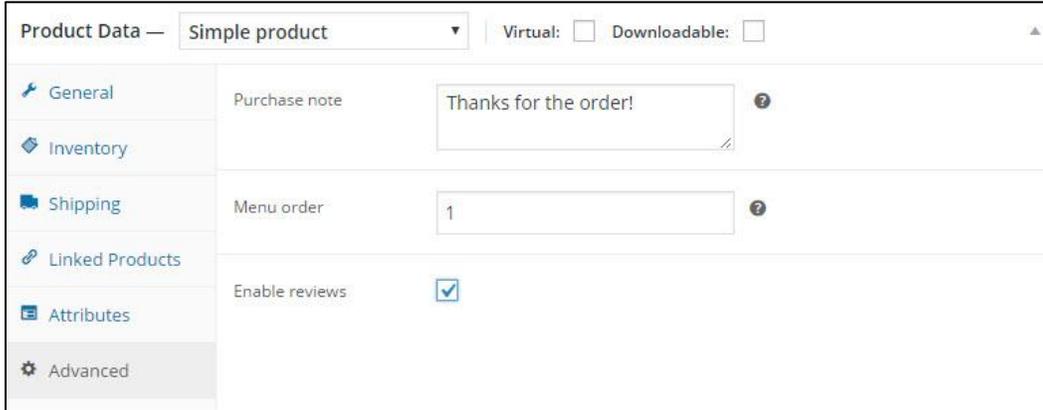
> **Purchase note** – Enter an optional note to send the customer after they purchase the product.
>
> **Menu order** – Enter a custom ordering position for this item. This will be the order the item is displayed in its category.
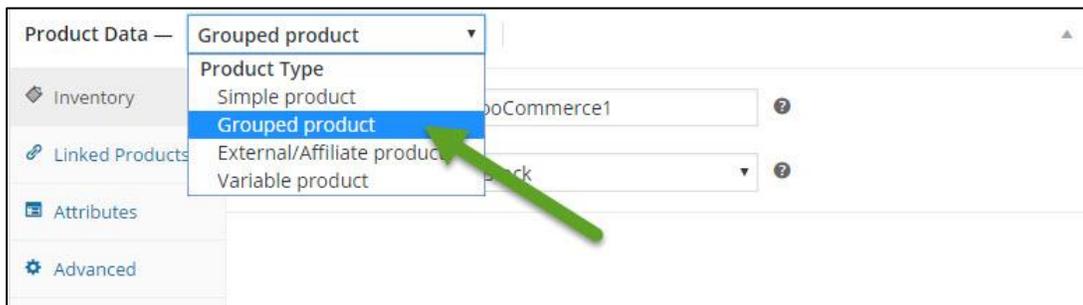>
> **Enable Reviews** – Enable/Disable customer reviews for this item.

Once you finished configuring your new product you will then click the "Publish" button and it will be added to the estore under the category you select and the product itself will be available by URL.

For more information on Adding Images and File Downloads to your Product's body click here.

Adding a grouped product (online video)

A grouped product is created in much the same way as a simple product. The only difference is you select Grouped from the Product Type dropdown in the General product tab details.

Upon setting the product as Grouped, the price and several other fields disappear. This is normal because a Grouped Product is a collection of "child products"; you'll add this information to individual child products. Once finished with the grouped product, publish it. The grouped product is now still an empty group. You need to create child products to add to this grouped product.

Once you've created a grouped product, you need to add at least one child product to add to this group. To create a child product, go to: Products > Add New to add a new product. The only information you must enter is:

- Title
- Product Type = Simple

You can also add a price and other product details, as needed. Now go to Linked Products to select the parent product from the Grouping dropdown:
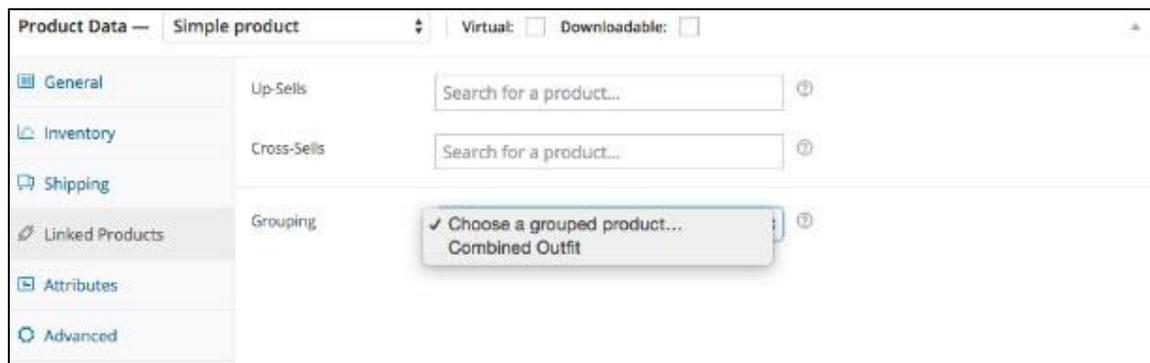
If you wish to control the order in which products are shown in a group, edit the Menu Order option under the "Advanced" section in product data.

As you can see, much of the process of creating a group product includes creating Simple Products as detailed above.

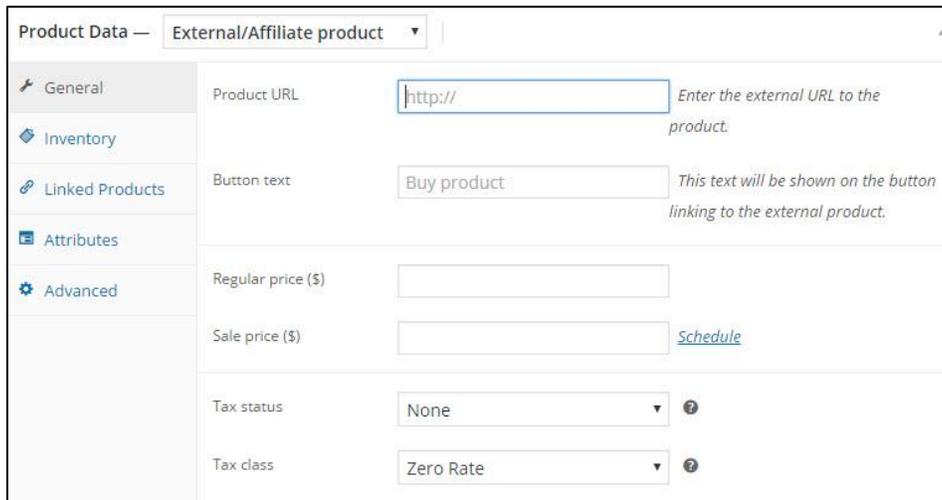**Adding an external/affiliate product ([online video](#))**

There will be times when you want to sell a product that is displayed on your site but is purchased on another site. For example if you are an affiliate or a reseller. An External or Affiliate product is what you need to setup.

Choose 'External/Affiliate' from the product type dropdown.

This removes some unnecessary tabs and fields, such as shipping and inventory, and inserts a new product URL field and custom button fields.

Product URL - Add the product URL. This will be the affiliate link or other links you were given that lead the customer directly to the outside site.

Button Text - Being able to add a custom button is a big advantage here. So you are not confusing or surprising your customers, you can have the button say something like "Buy On Amazon". That way they know what is going to happen and you are not misleading them.

Adding any additional information such as a SKU is totally optional as well as adding a price. Adding a price from an external site can be challenging, as some sites may change the price often, and then it would be better to not add a price. But that is up to you.

You can also add "Linked Products" and "Advanced" items like you were creating a simple product.

Adding an variable product ([online video](#))

Variable products are arguably the most complex of product types. They let you define variations of a single product where each variation may have a different SKU, price or stock level. For example, they can be used for a product like a shirt, where you can offer a large, medium and small and in different colors.

After you have followed the above steps to "Add Product" and have been take to a blank "Add New Product" editor page, you will go through the process of adding the product title, slug/URL, Short Description, Wordpress Access Control, Product Categories, images, etc..

Under the "Body Copy Box - Long Description" is the "**Product Date Meta Box**". The Product Data meta box is where the majority of important data is added for your products.

Here you will select the product type and select "Variable Product".
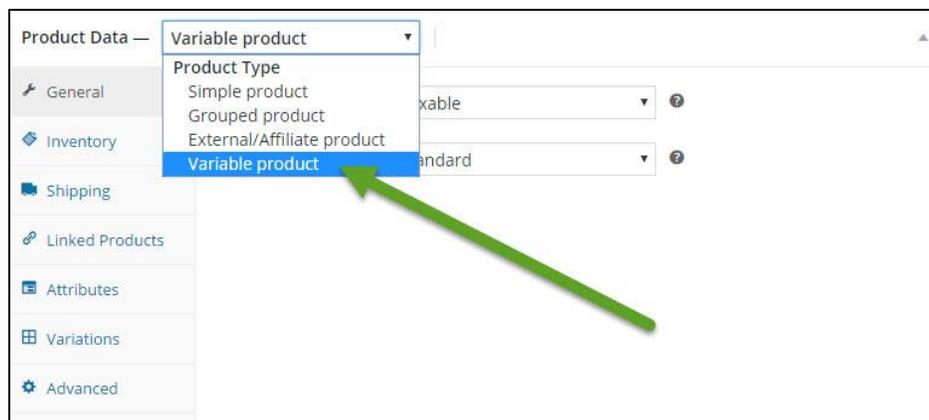
This will move the "Virtual", "Downloadable", "Price", etc. to the new "Variations" tab.

There are now potentially seven sections available to be configured: General, Inventory, Shipping (optional), Linked Products, Attributes, Variations, and Advanced.

For this product type we will only focus on the "Attributes" and "Variations" tabs as the remaining sections, such as "Linked Products" and "Advanced", are items that you will configure like you were creating a simple product.

Attributes Section:

In the Attributes section, add attributes before creating variations — use global attributes that are site wide or define custom ones specific to a product.

For more information on Global Attributes see the section "Managing Product Categories, Tags and Attributes" above.
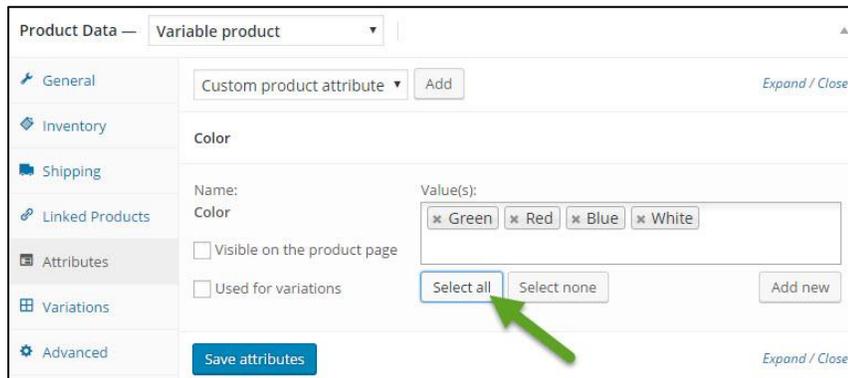
Global attributes

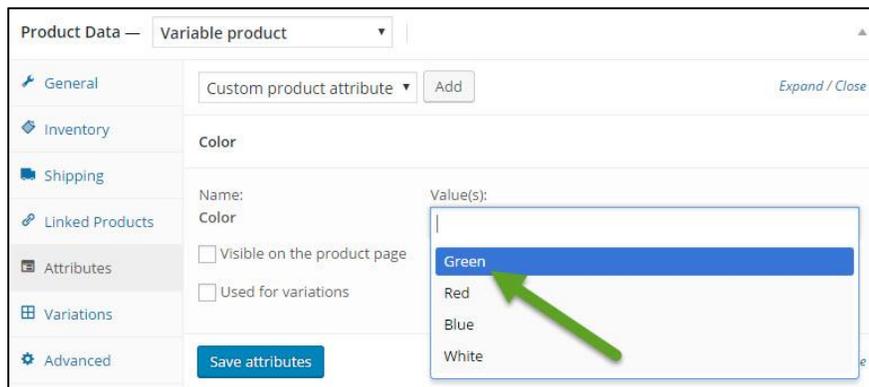To use a global attribute:

- Select one from the dropdown and Add.
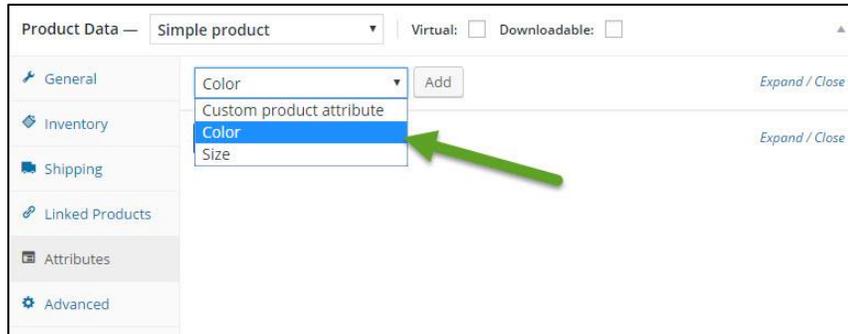
- Choose Select all to add all attributes to the variable product

or click the values box and select individual attributes.

- You can also add new custom ones to a global attribute by clicking the "Add New" button and remove individual attributes by clicking the X on it in the "Value(s)" box.

- Tick the "Used for variations" checkbox to tell WooCommerce it's for your variations.

- Click "Save Attributes"

Custom attributes specific to product

You can also create custom attributes on-the-fly specific for your one product.

- Select Custom product attribute, and Add.
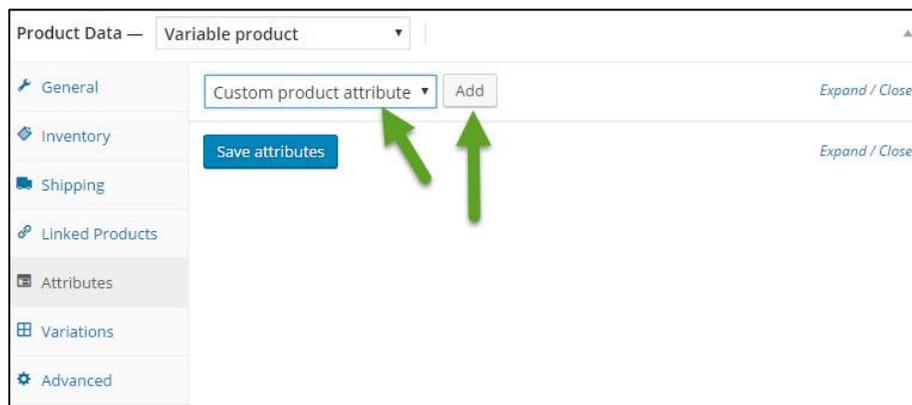
- Name the attribute (e.g. Size) and then set values separated by a vertical pipe (e.g., small|medium|large)
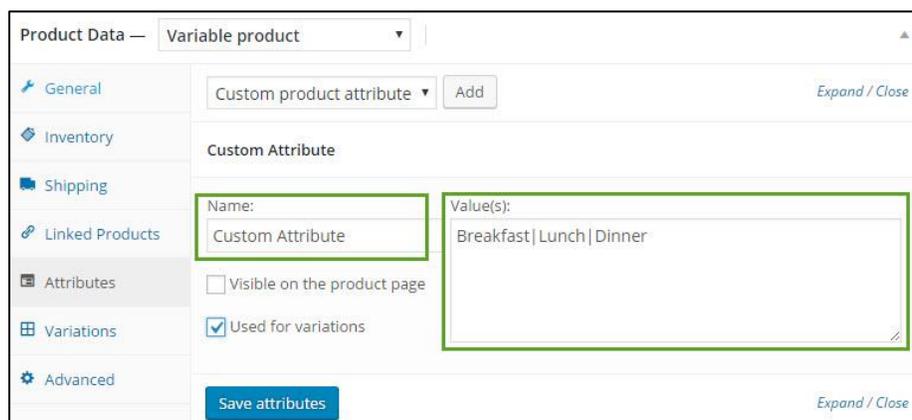
- Tick the "Used for variations" checkbox to tell WooCommerce it's for your variations.
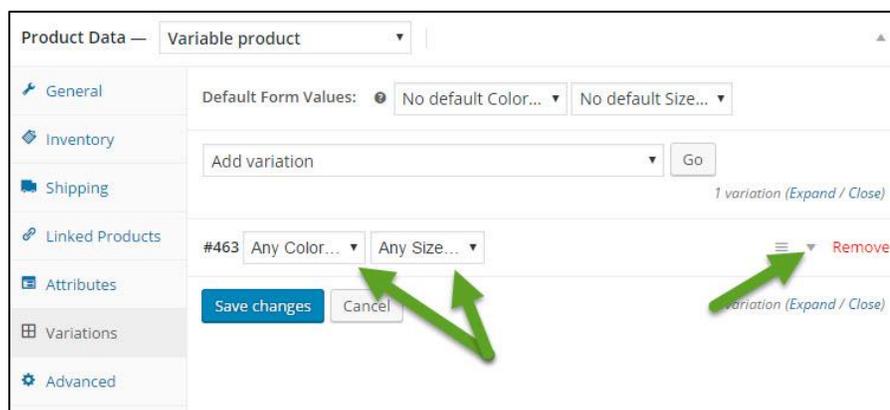
- Click "Save Attributes"

Variations Section

Variations can be created from the different attributes you add to a variable product. For example if you add a size attribute of S,M, and L and a color attribute of Blue, Red, and White, if you created variations for all of the attribute options there would nine variations: Blue S, Red, S, White S, Blue M, Red M, White M, Blue L, Red L, and White L.

Manually Adding a Variation

- On the Variations tab select "Add Variation" from the drop-down and click "Go".
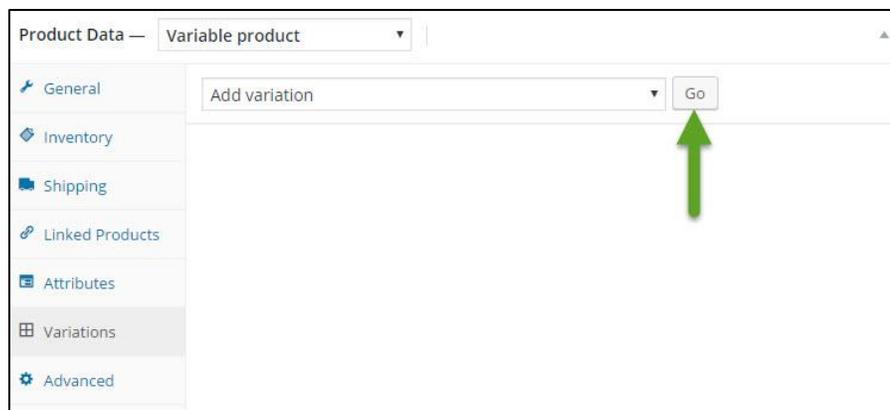
- Select attributes for your variation. To change additional data, click the triangle icon to expand the variation.

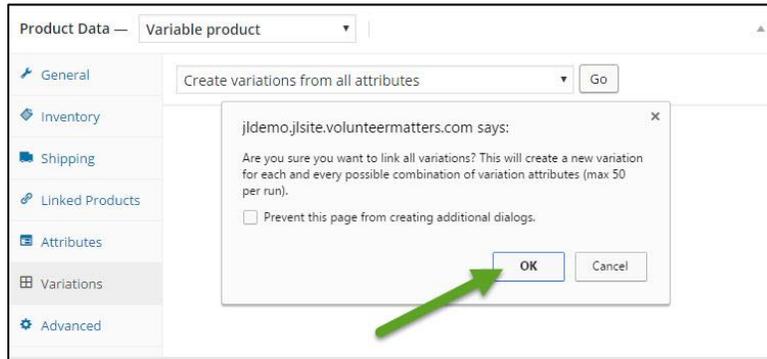- Edit any available data. The only required field is **Regular Price**.

- Save Changes.

Automatically Adding Variations

If you are creating variations for all the combinations of your attributes you can create them all at once.
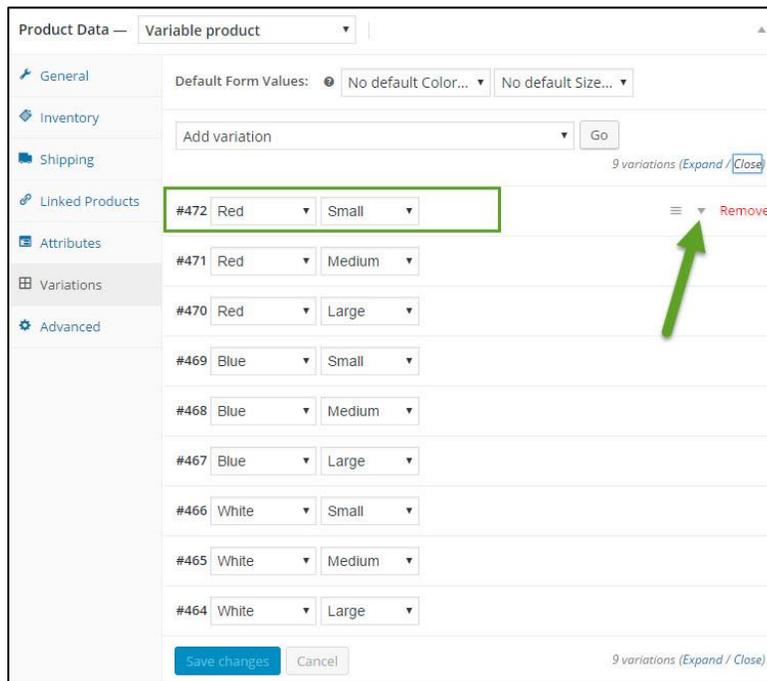
- On the Variations tab select "Create variations from all attributes" from the drop-down and click "Go".

- Click "OK" to create a variation for each and every possible combination of variation attributes (max 50 per run).

- To change additional data on any of the variations, click the triangle icon to expand the variation.

NOTE: You can also expand or close all the variations at once via the "Expand/Close" links.

- Edit any available data. The only required field is **Regular Price**.

- Save Changes.

Editing Many Variations

If you have more than 10 variations, use the buttons to navigate forward and backward through the list. Each time you navigate to a new set of variations, the previous set is saved. This ensures that all data is saved.

Setting Defaults

You are able to set defaults that you prefer on variations. In the example, we have no defaults set, so users can pick any color and size right away from the product page.
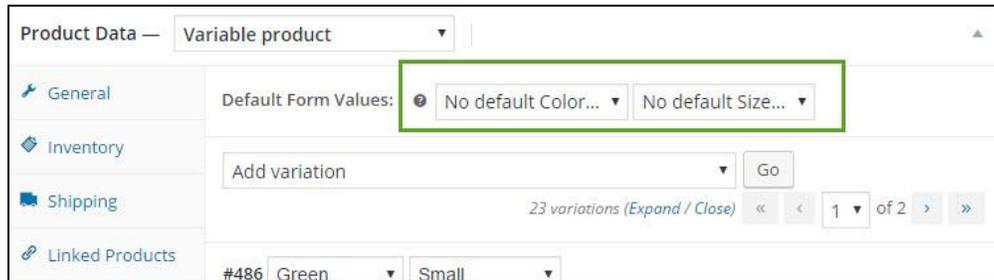
If you want a certain variation already selected when a user visits the product page, you can set those. This also enables the Add to Cart button to appear automatically on variable product pages.

You can only set defaults after at least one variation has been created.

Variation Data

Each variation may be assigned:

General

- **Enabled** – Enable or disable the variation.
- **Downloadable** – If this a downloadable variation.
- **Virtual** – If this product isn't physical or shipped, shipping settings are removed.
- **Regular Price (required)** – Set the price for this variation.
- **Sale Price (optional)** – Set a price for this variation when on sale.
- **Tax class** – Tax class for this variation. Useful if you are offering variations spanning different tax bands. Tax Status is set on the product level.
- **Downloadable Files** – Shows if Downloadable is selected. Add file(s) for customers to download.
- **Download Limit** – Shows if Downloadable is selected. Set how many times a customer can download the file(s). Leave blank for unlimited.
- **Download Expiry** – Shows if Downloadable is selected. Set the number of days before a download expires after purchase.

Inventory

- **SKU** – If you use SKUs, set the SKU or leave blank to use the product's SKU.
- **Manage Stock?** – Manage stock at the variation level.

- **Stock Quantity** – Shows if Manage Stock is selected. Input the quantity. Stock for the specific variation, or left blank to use the product's stock settings.
- **Allow Backorders** – Choose how to handle backorders.
- **Stock Status** – Set the status of your variation's stock.

Shipping

- **Weight** – Weight for the variation, or left blank to use the product's weight.
- **Dimensions** – Height, width and length for the variation, or left blank to use the product's dimensions.
- **Shipping class** – Shipping class can affect shipping. Set this if it differs from the product.

If the SKU, weight, dimensions and stock fields are not set, then it inherits values assigned to the variable product. **Price fields must be set per variation**.

Add an image for the variation

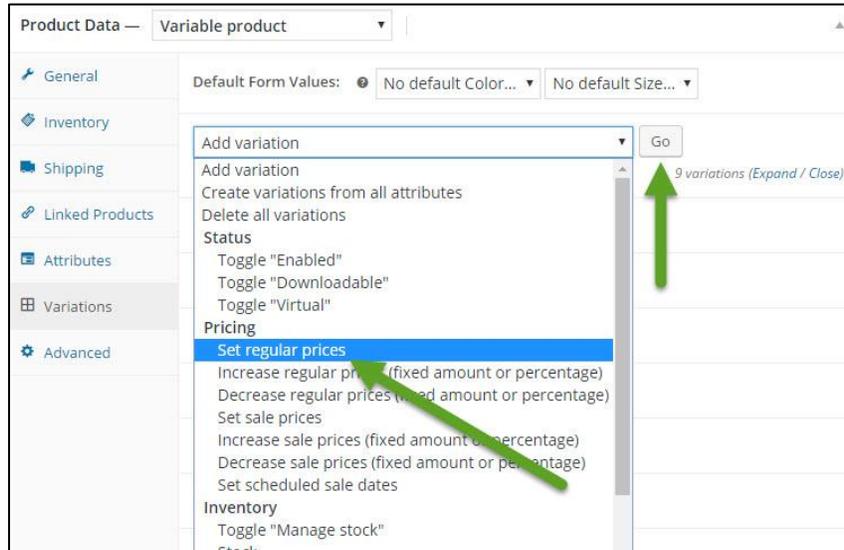- Expand the variation.
- Click the blue image placeholder.
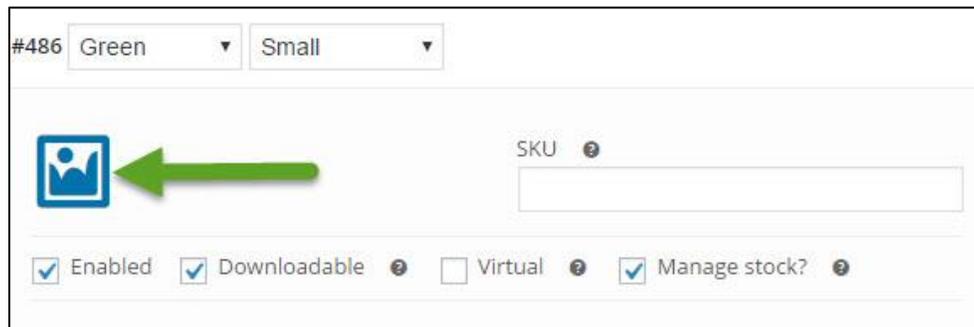
- Select the image you wish to use from the media library
- Click "Set variation image".
- Click "Save Changes" at bottom of the "**Product Date Meta Box**".

Bulk editing variations

You can bulk-edit variations by selecting the specific piece of data you want from the dropdown. In this example below, I want to edit prices for all variations.

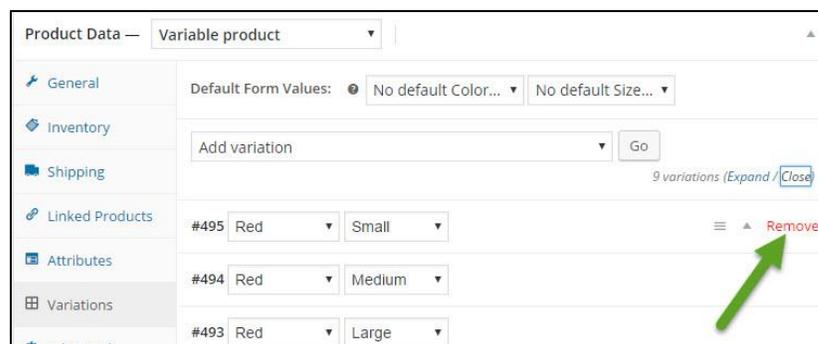This will update all of the variations with the change you enter.

This will open a window where you can enter the value and click "OK"
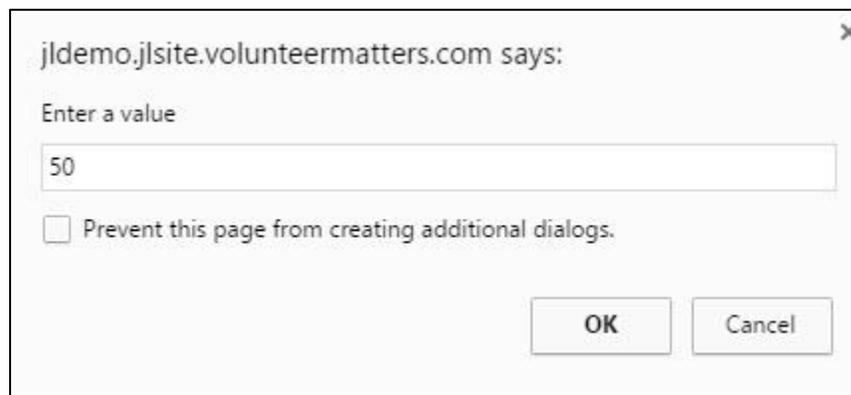
This should automatically update and save all the variations with your change.

Deleting a variation

- To remove a specific variation, click the "Remove" link to delete the variation.

You can also delete all variations at on the Variations tab by selecting "Delete all variations" from the drop-down and click "Go".
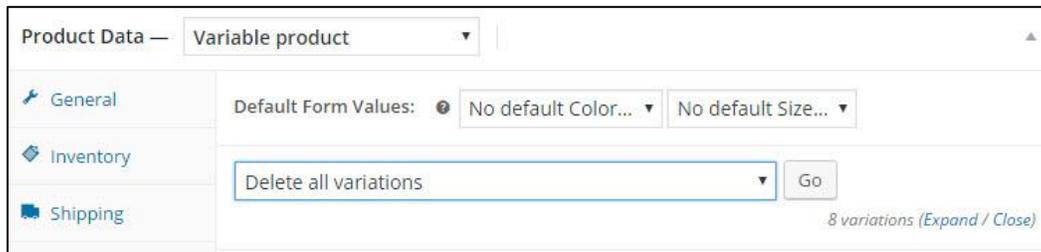

Duplicating a product

To save time, it's possible to use a product and duplicate it to create similar products with variations and other qualities.

To duplicate a product, login to the system with the proper administrative privileges and go to the Admin Dashboard. Then click on Products to take you to your current product list. There you can look through the list for a product you wish to replicate, and then click Duplicate or Duplicate Product. Both accomplish the same functionality.


Editing a product

The initial product display order is by publish date (descending).   You can change that when you are on the page to sort by Name, SKU, Categories, Price, etc.. Basically most any column you add to the display via the "Screen Options" drop-down at the top of the screen. You can also filters based dates, categories, and product types.
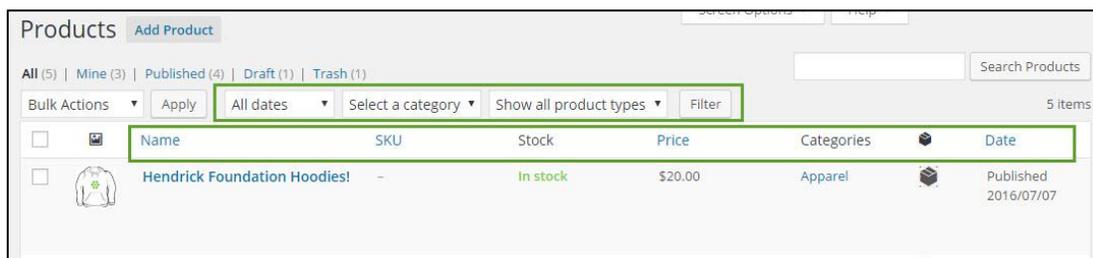
You can also search for keywords in your products.   For example, if your website has a

lot of products and you are looking for the "hat" product, you could enter hate in the Search field and click "Search Products" or "Enter" on your keyboard.
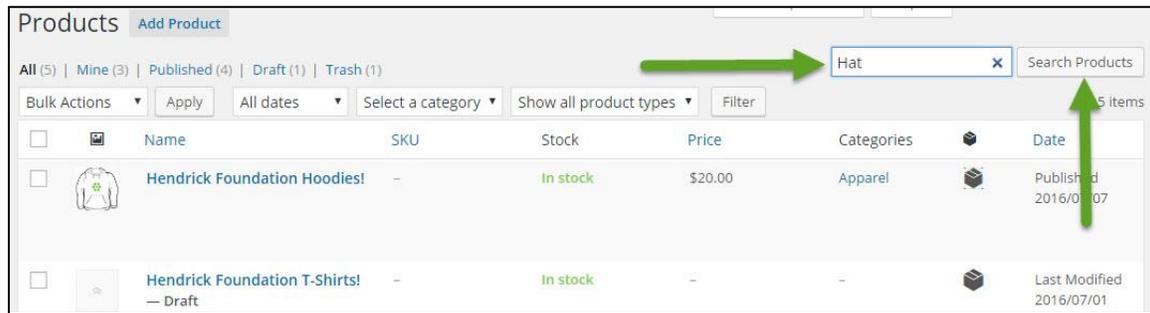
This will return all products that feature that keyword whether in the title or content.

Once you locate the product you wish to edit, you can hover your cursor over the product and additional elements will be displayed for each product:

Edit | Quick Edit | Trash | View | Duplicate Product | Duplicate

Edit - This Action can be either an "Immediate Action" or a "Bulk Action". The Immediate Action, initiated by click on the Product Name or clicking on the Edit option just below the Product Name, causes the Edit Product screen to display. Edit is also available as a Bulk Action for the selected products (see following selection for Bulk Actions)

Quick Edit - Quick Edit is an Immediate Action performed on one Product by clicking the Quick Edit link, under the Product Name in the Table of Products. Quick Edit is just an in-line edit that allows you to change the following items--Title, Slug, Date, Password or Private post box, Product Categories, Tags, Allow Comments, and Status, as well as a large number of product data elements (SKU, Price, Tax, Stock, etc.).

Trash - This Action deletes the Product. Delete is available both as a Bulk Action, and an Immediate Action. This will only place the event in the trash section of the Table of Products. From there you can either restore it or delete permanently. *Note*: You cannot delete locked products. Locked products are when someone else is currently editing it.

View - This Action presents the Product as it appears on your website. View is available only as an Immediate Action.

Duplicate Product/Duplicate - This action will create an exact duplicate of whatever product you select it on.
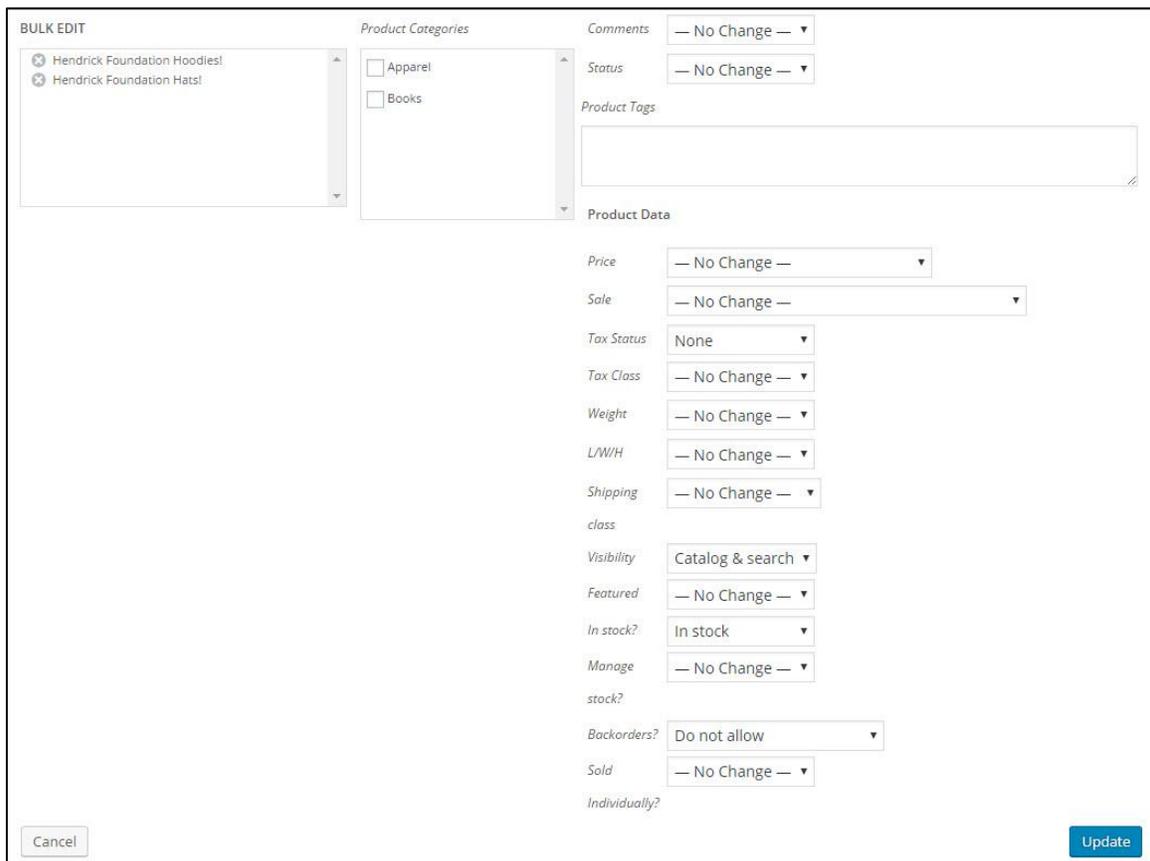
When on the Edit Product screen, once you make your necessary changes to the product, you will click the "Update" button and your changes will be committed and display on the product in question and the estore page.

Bulk Edit Options for Products

The Bulk Edit Products 'screen' is displayed below the Table Of Product header once, one, or more Products, have been selected, and the Bulk Action of Edit is Applied. Bulk Edit allows the categories, comments, Status, and various product data (Price, Taxes, Stock, etc.) to be changed for all the selected products.

It is important to note, Categories and Tags can be ADDED in bulk to a set of Products but it is not possible to CHANGE, or DELETE, a Category, or Tag, for those Products.

- **Cancel** - Click Cancel to cancel and abort the Bulk Edit of these Products.
- **Update** - Click Update to save the Bulk Edits made to these Products.

Deleting Products

If you wish to delete an existing product, you can do so in a few different ways:

- **Immediate Action from the Table of Products list** - hover over the product and click on Trash

- **Bulk Delete from the Table of Products list -** once, one, or more Products, have been selected, and the Bulk Action of "Move to Trash" is applied those products will immediately be sent to the product trash section.
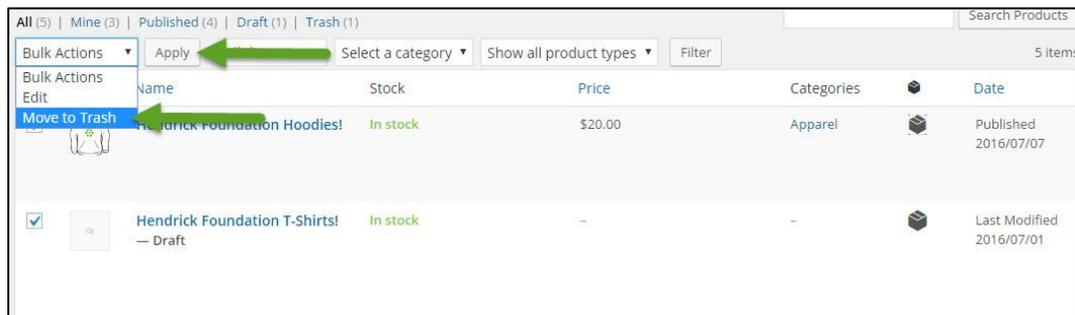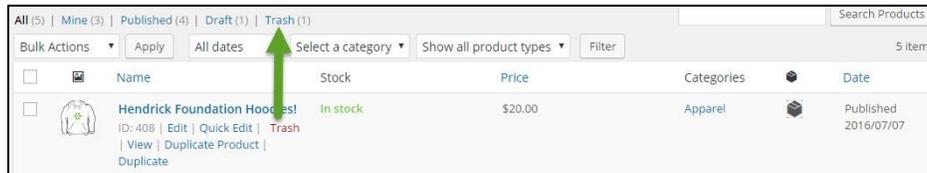

- **Publish meta box "Move to Trash" link** - when editing an product clicking on the "Move to Trash" link in the "Publish" meta box will immediately send the product to the product trash section.
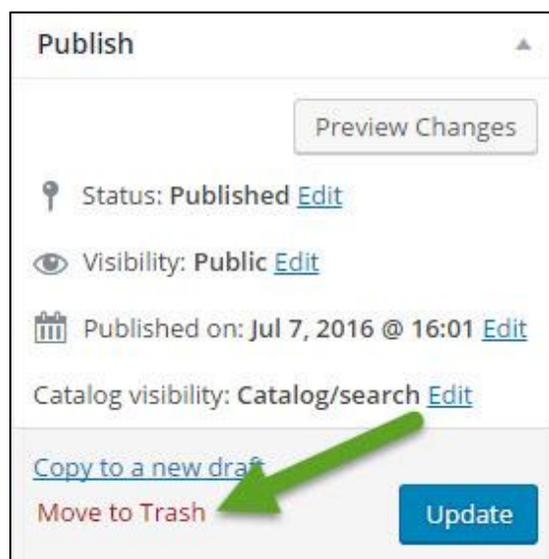
Product Trash Section

In the Table of Products, if there are trashed products, they will show as a link (with number of products trashed) that you can click on.

From there you can either restore a product(s) or delete permanently.

For more information on adding and managing products please review the following page and video within Woo-Commerce:
https://docs.woothemes.com/document/managing-products/

Please note that some aspects of WooCommerce are only available to Closerware Support.

Coupon Management

You can create as many coupons as you wish within the Shopping plugin.

To **create a new coupon**, you will need to login to the website with appropriate credentials. The login location will depend on your website theme for its location.

Once you successfully login in with the proper administrative privileges the screen will now include an "Admin Bar" at the top of the screen.
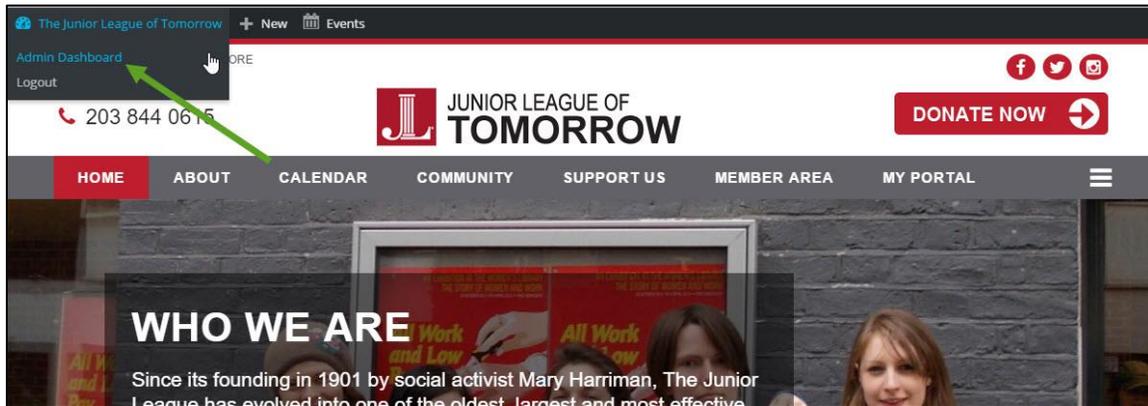
There are multiple methods for adding a new estore coupon but all lead to the same page.

Click on the "New" link in the Admin Bar and select "Coupon" from the drop down. This will take you to the "Add New Coupon" editor.
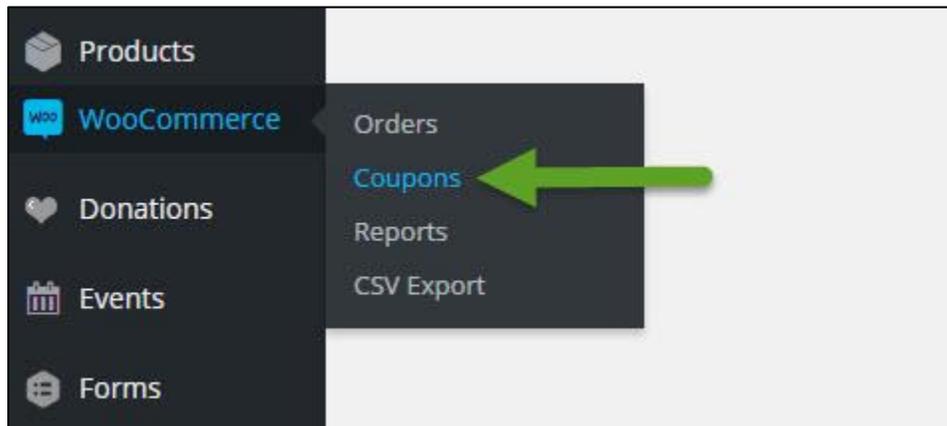
or

Click on the "Admin Dashboard" link to enter the administrative area of the website.
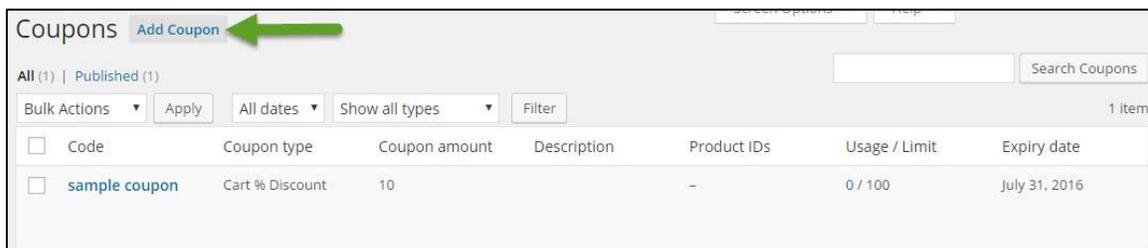

Then click on the "WooCommerce" menu entry and then click "Coupons". The "Coupons" will also appear when you hover the cursor over the "WooCommerce" menu entry in the left hand side menu.
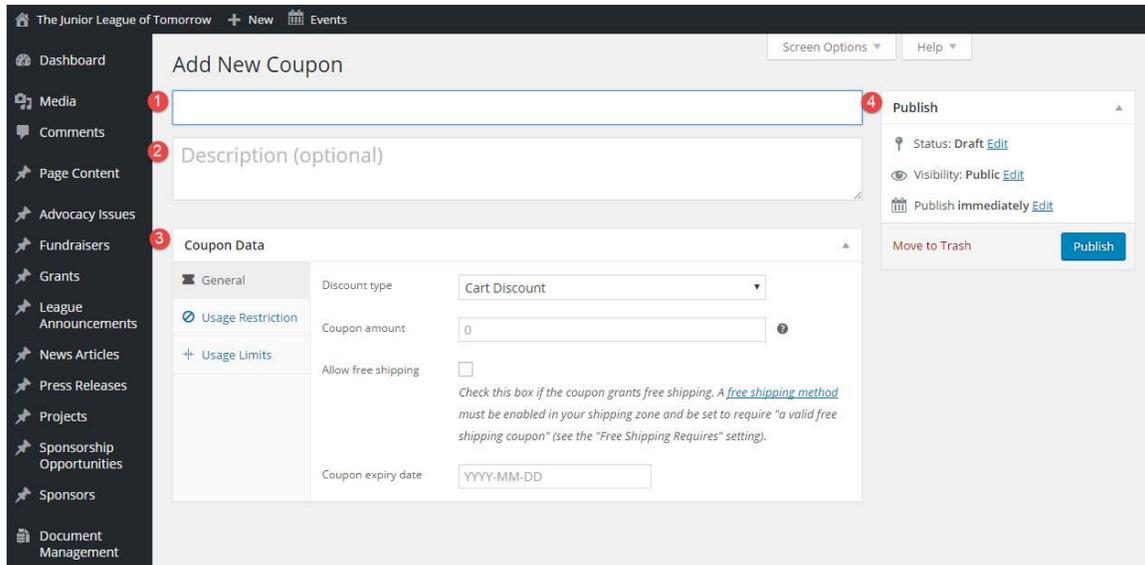

or

When you are on the listing of coupons or editing a coupon there will be an "Add Coupon" button.

Once you have used one of those methods to create a "New" coupon, you will be taken to the "Add New Coupon" editor page.

Here is a screenshot of the blank "Add New Coupon" editor page.

The typical elements needed for adding a coupon are the following

1. **Coupon Code** - Code used by the customer to apply the coupon.

2. **Description** - Describe the coupon. (For internal use.)

3. **Coupon Data** - There are three sections you can use to add restrictions and limits for the coupon:

   o **General**

      ▪ **Discount type** :
         o **Cart discount** – A fixed total discount for the entire cart.
         o **Cart % discount** – A percentage discount for the entire cart.
         o **Product discount** – A fixed total discount for selected products only.
         o **Product % discount** – A percentage discount for selected products only.
      ▪ **Coupon amount** – Fixed value or percentage off depending on the discount type you choose. Entered without the currency unit or a

percent sign as these will be added automatically, e.g., '10' for $10 or 10%.

- **Allow free shipping** – Removes shipping cost when coupon is used. Requires free shipping be enabled.
- **Coupon expiry date** – What date the coupon should expire and can no longer be used. Expiry happens at 12:00 am or 00:00 on the date chosen. If you want a coupon to be valid through Christmas Day but invalid the moment Christmas is over, set the expiration date to YYYY-12-26. It uses your site's time zone setting.

Note: Coupons are applied to the product price before tax is calculated.

o Usage Restriction

- **Minimum spend** – This field allows you to set the minimum subtotal needed to use the coupon. Note: The sum of the cart subtotal + tax is used to determine the minimum amount.
- **Maximum spend** – This field allows you to set the maximum subtotal allowed when using the coupon.
- **Individual use only** – Tick the box if you don't want this coupon to be used in addition to other coupons.
- **Exclude sale items** – Tick the box if you don't want this coupon to apply to products on sale. Per-cart coupons do not work if a sale item is added afterward.
- **Products** – Selection of products that the cart must contain for the coupon to be valid; or which products are discounted for Product Discounts.
- **Exclude products** – A list of products that the cart must not contain for the coupon to be valid for Cart Discounts; or which individual products are not discounted for Product Discounts.

- **Product categories** – A list of product categories that the cart must contain for the coupon to be valid; or which categories are discounted for Product Discounts.
- **Exclude categories** – A list of product categories that the cart must not contain for the coupon to be valid for Cart Discounts; or which categories are not discounted for Product Discounts.
- **Email restrictions** – A list of email addresses that are allowed to use a coupon. This verifies with the customer's billing email.

Note: Leaving "Products" and "Exclude Products" blank will allow the coupon to be applied to the entire store.

o Usage Limits

- **Usage limit per coupon** – How many times a coupon can be used by all customers before being invalid.
- **Usage limit per user** – How many times a coupon can be used by each customer before being invalid for that customer.
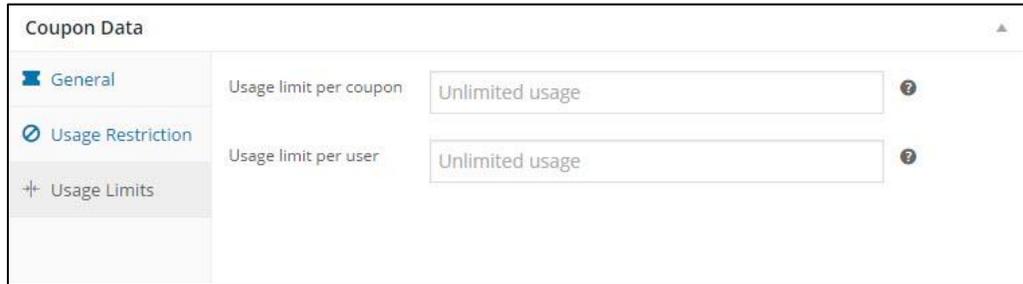
4. **Publish Meta Box**

There are 3 main elements in this box: Status, Visibility, and Published.

Status can be "Published", "Pending Review", or "Draft". For coupons, this should remain as "Published" if you want it live within the eStore or Pending Review or Draft to make it only available on the Admin Dashboard.

Visibility - This should always be set as public if you want the coupon available for use.

Published will show the date/time the coupon was created.

For the most part you will only click the "Publish/Update" button in this box to either publish your coupon the first time or to update your coupon.

Once you've configured all the settings, select **Publish** and your coupon is ready to be used.

Once you've published your coupon, you can send it to your customers: just copy the title and communicate it with your customers through email and social media. The restrictions, limits and general settings will determine how the coupon can be used by the customers.

For more information on coupon management please review the following page and video within Woo-Commerce: https://docs.woothemes.com/document/coupon-management/

Please note that some aspects of WooCommerce are only available to Closerware Support.

Managing Orders

Orders are created when a customer completes the checkout process and are visible by administrators with the proper administrative access. Each order is given a unique non-sequential Order ID.

An order also has a status. The order statuses let you know how far along the order is, starting from pending and ending with complete. The following order statuses are used:

- **Pending payment** – Order received (unpaid)
- **Failed** – Payment failed or was declined (unpaid). Note that this status may not show immediately and instead show as pending until verified (i.e., PayPal).
- **Processing** – Payment received and stock has been reduced- the order is awaiting fulfillment
- **Completed** – Order fulfilled and complete – requires no further action
- **On-Hold** – Awaiting payment – stock is reduced, but you need to confirm payment
- **Cancelled** – Cancelled by an admin or the customer – no further action required
- **Refunded** – Refunded by an admin – no further action required

Viewing orders

When you start taking orders the order management page will begin to fill up. You can view these orders by logging into your website with the proper administrative access and then click on the "Admin Dashboard" link to enter the administrative area of the website.
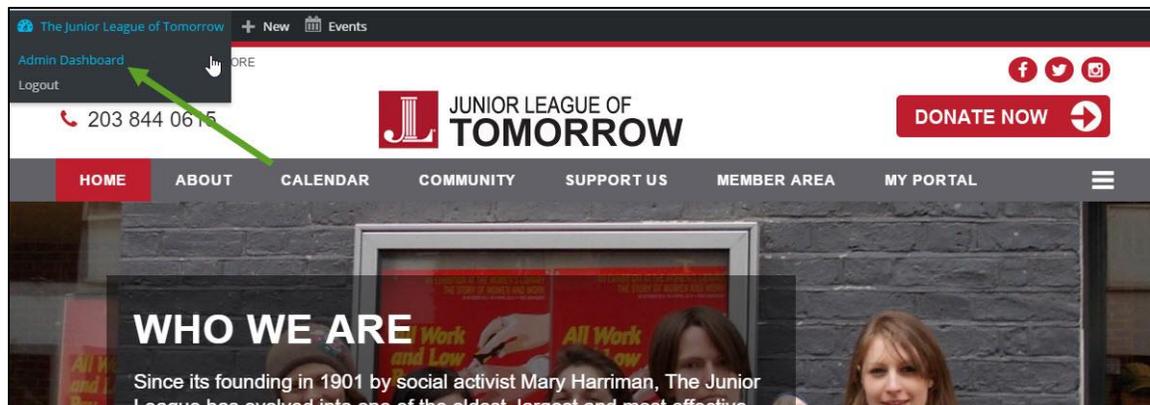

Then click on the "WooCommerce" menu entry and then click "Orders". The "Orders" will also appear when you hover the cursor over the "WooCommerce" menu entry in the left hand side menu.
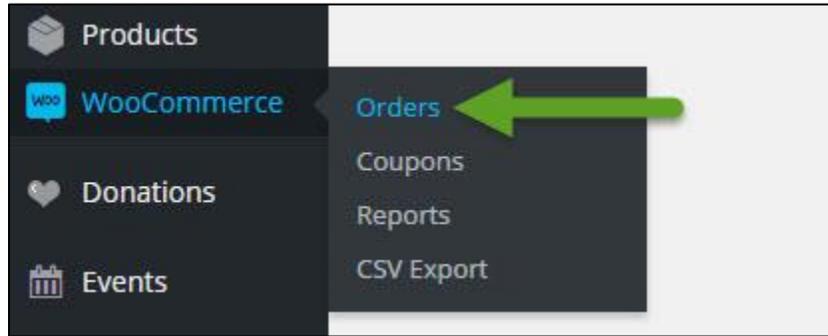
Each order row displays useful details, such as the customer's address, email, telephone number, and the order status. You can click the order number or the 'view order' button to see the single order page (this is also where you can edit the order details and update the status).
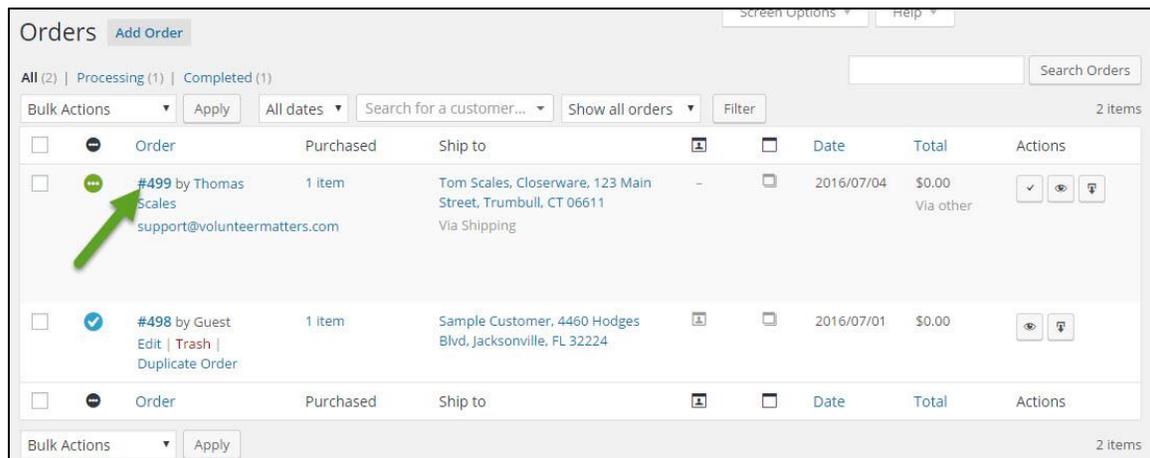

Order rows also have some handy shortcut buttons to quickly mark orders complete and processing.
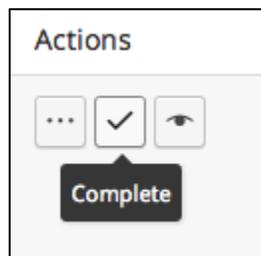
You can filter the list of displayed orders by date and customer by using the form at the top of the screen.
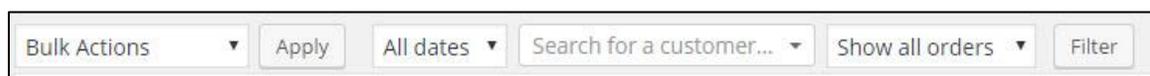
You can also search for keywords in your orders. For example, if your website has a lot of orders and you are looking for orders with the "hat" product, you could enter hat in the search field and click "Search Orders" or "Enter" on your keyboard.
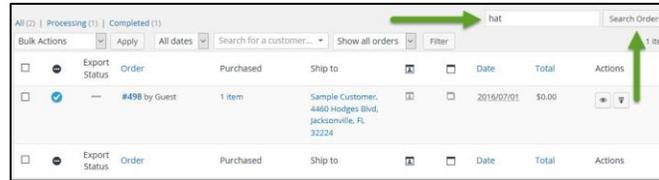
This will return all orders that feature that keyword whether in the title or content.

Editing/viewing single orders

From the single order page not only can you view all order data, you can edit and update it. You can:

- Change the **order status**
- Edit **order items** – modify the product, prices, and taxes
- **Stock** – Reduce and restore stock for an order
- **Order Actions** – Resend order emails to the customer using the drop down menu above the Save Order button. Send New Order, Processing Order, Completed Order or Customer Invoice emails – very handy if manually creating an order for your customers
- Modify product **Meta** to edit product variations by removing and adding meta.

Order Data

The order data panel lets you modify the order status, view (or change) the customer's order note, and change which user the order is assigned to.

You'll also find the customers billing and shipping addresses, along with a link to view other purchases the customer may have had in the past. To edit addresses, click 'edit' and a form will appear. Once saved, the new address will be displayed in a localized format.

Order Items

Note: To edit the order, the status must be set to On Hold or Pending Payment.

The next panel on the order page is the order items panel. This panel lists items which are in the order, as well as quantities and prices.

The editable parts of line items include:

- **Quantity** – The quantity of the item the user is purchasing
- **Line Subtotal** – Line price and line tax before pre-tax discounts
- **Line Total** – Line price and line tax after pre-tax discounts
- Add **Meta** – Add and remove meta to change product variable options.
- **Sorting** – Sort by Item, Cost, Quantity, and Total by clicking on the respective listed items.

Here you can also add additional fees for items. Click "Add fee" and fill out the fee name and amount.

Order Totals

The Order Totals panel stores totals and tax for the order. You can enter these values yourself or have them part calculated for you using the 'calc totals' button. The totals comprise of the following:

- **Cart Discount** – pre-tax discounts. Can be auto-calculated.
- **Order Discount** – post-tax discounts. Need to be input manually.
- **Shipping cost** – cost excluding tax.
- **Shipping method** – name of the method.
- **Cart tax** – cart tax total.
- **Shipping tax** – shipping tax total.
- **Order total**
- **Payment method** – name of the payment method used.

There are two buttons available on this panel – **"Calculate Taxes"** and **"Calculate Totals"**. Calculating taxes will use your prices, and calculate the tax based on the customers shipping address. If the customer's address has not been input, it will default to the stores base location.

Adding an order manually

Add an order using the "Add Order" link at the top of the orders page. Once added you can input the customer details, add line items, and calculate the totals. You should set a relevant status for the new order – if it needs to be paid use "pending payment".

After saving, you can use the Order Actions dropdown to email the Customer Invoice with payment instructions. To send, be sure to select Save Order.
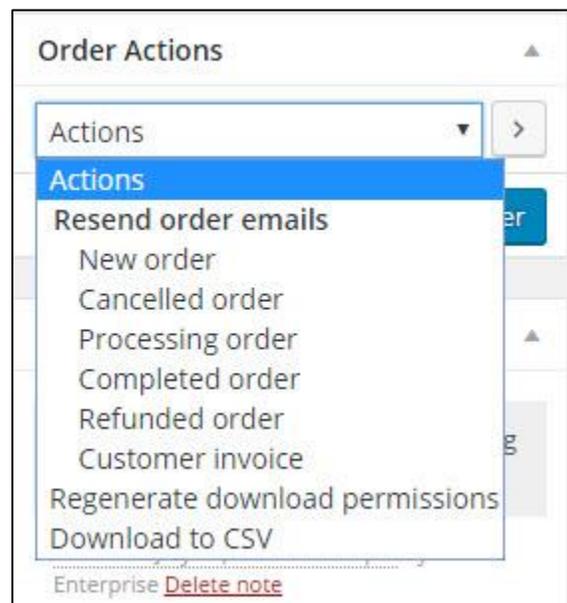
Order/Customer Notes

The "Order Notes" panel displays notes attached to the order. These are used for storing event details, such as payment results or reducing stock levels, and for adding notes to the order for customers to view.
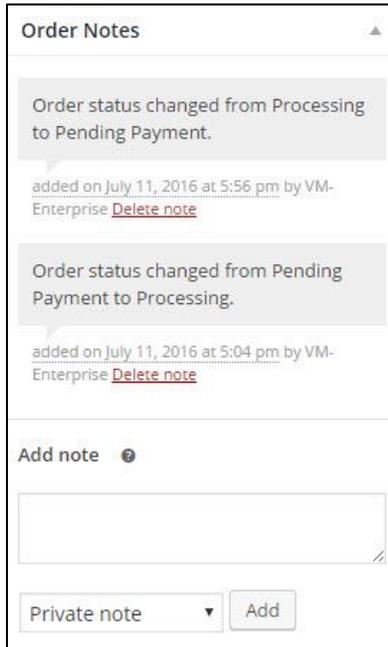
The notes feature can be a very powerful tool for communicating with customers. Need to add a tracking number for shipping? Some stock is delayed? Add a customer note and they will be automatically notified.

When added, customer notes are highlighted in blue. Customers receive notes via email, but can view them by viewing an order if this is enabled.

Refunding Orders

Automatic refunding is not configured outside of the box and would require professional services. If interested please contact support.

Refunding manually will not automatically send the refund to your payment gateway, but allow you to mark the order as refunded on the order. Refunds extend to products, taxes, and shipping fees and must be processed directly with your Payment Gateway. PayPal will update the order with the refund order note/status after it is processed at PayPal.
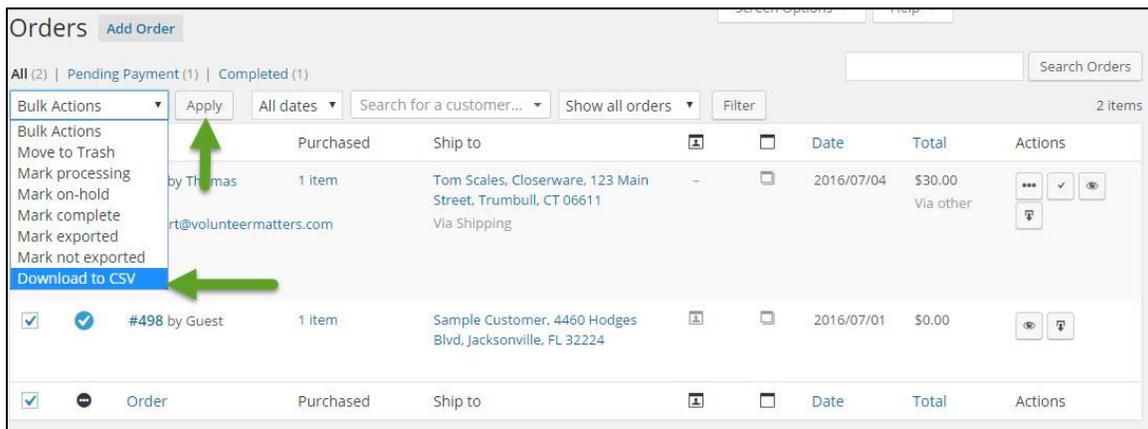
How to Export Orders

Exporting Individual Orders – Click the export icon on the Orders page to export the individual order to CSV:
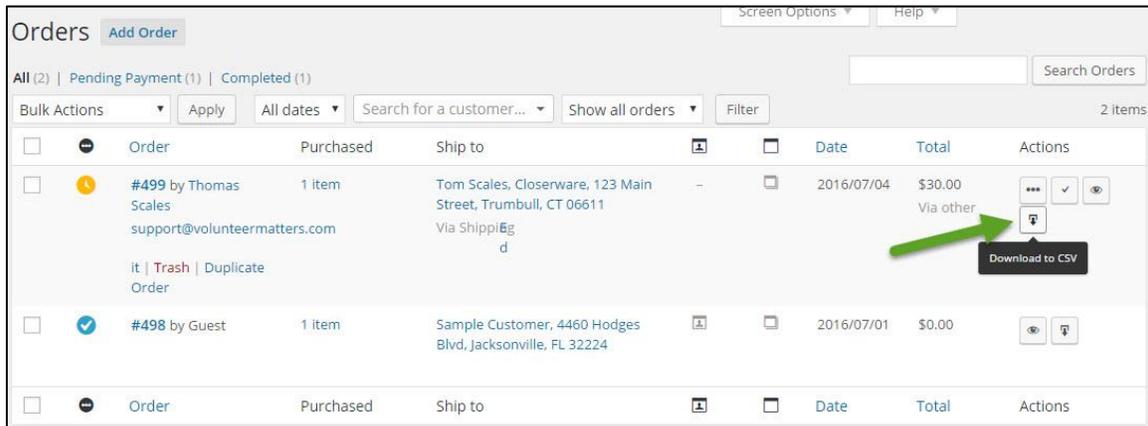
or when editing the Order, you can select "Download to CSV" order action.
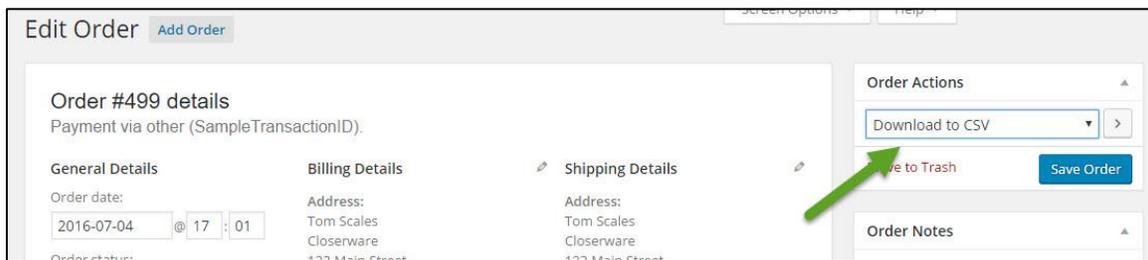
Exporting orders in bulk – Select multiple orders and go to Bulk Actions > Download to CSV to export the selected orders to CSV.

Exporting all orders – You may export all orders with a certain order status, or within a range of dates by using the bulk export tool under WooCommerce > CSV Export > Export.

If you don't select a start date, all orders up until your end date will be exported. If you don't select an end date, the current date will be used.
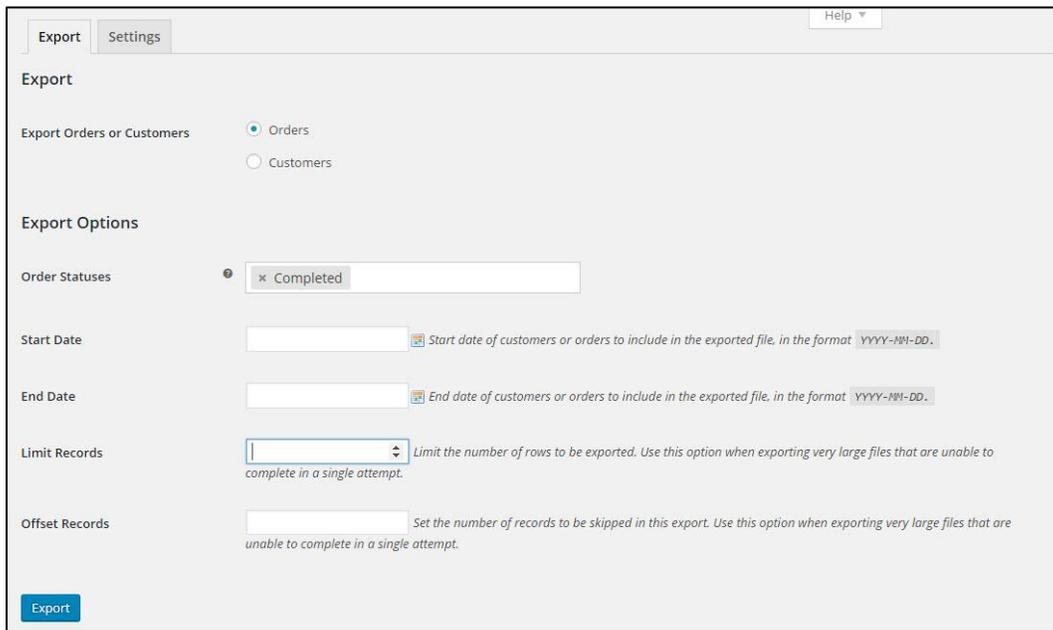
You can also limit and offset records. This can be used for exports with a large amount of data if the request times out. If you do find that the request times out, you can limit the number of orders exported using the "Limit Records" setting. This will provide the total number of orders to export.

You can then use the "Offset Records" setting as needed. If left blank, it will export the first set of orders (the first order in your date range up to the limit). If you offset this to 500, for example, the export will instead begin at record 501 until reaching your export limit. You can combine these two settings to create your own "batches" until your export is complete.

Note that these settings do not refer to the order numbers – they merely reference the total number of orders in your selected date range.

Managing Export Status

When an order is automatically exported, the export status will change from "not exported" to "exported". When an order is manually exported to CSV, the export status will not change. You can change the export status for multiple orders by using the order bulk actions.

For more information on managing orders please review the following page and video within Woo-Commerce: https://docs.woothemes.com/document/managing-orders/

Please note that some aspects of WooCommerce are only available to Closerware Support.

<u>Sales Reports</u>

Reports in WooCommerce give you the ability to see your store's performance from month to month using graphs and stats. It has three sections: Orders, Customers, Taxes and Stock.

Orders

Orders reports allow you to view gross and net sales volume and totals, as well as top sellers, top freebies and top earners. Sub-sections are shown below.


Note: By default, orders marked Processing, On Hold and Completed are counted as sales.

Sales by date

The orders tab starts with the **sales by date** section – this gives you an idea of the current performance via a sales graph and a few way ways to drill down into data as well. By year, last month, this month, last 7 days, and a custom date range.

The sales graph itself shows the amount of gross sales plotted on a light blue line, the net sales plotted in dark blue , the shipping amount plotted in green, refunds plotted in red, and coupon values redeemed in orange. Hovering over a point will give you the exact figure.
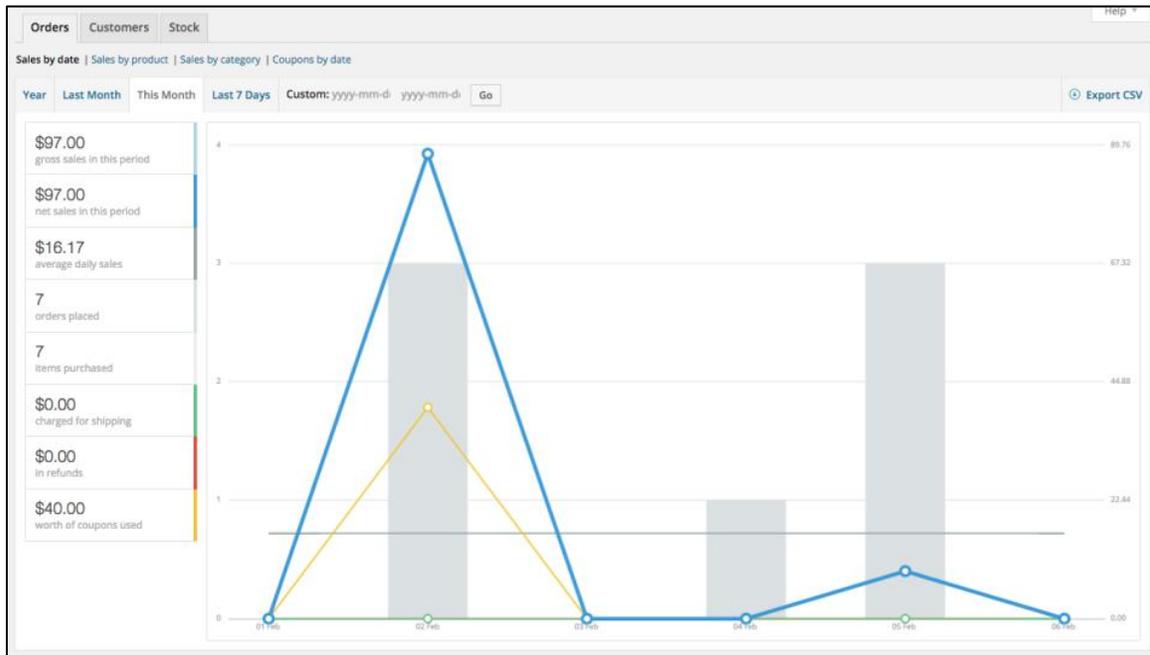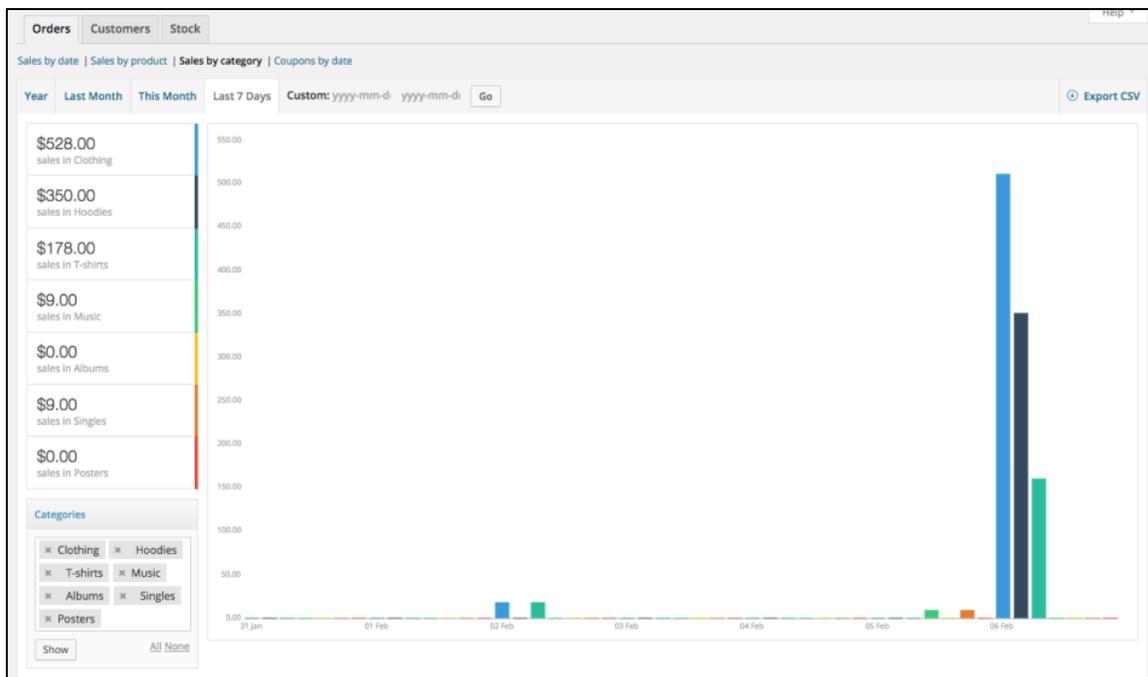
Sales by product

The sales per product section shows sales per day in a given range, similarly to the overview section:
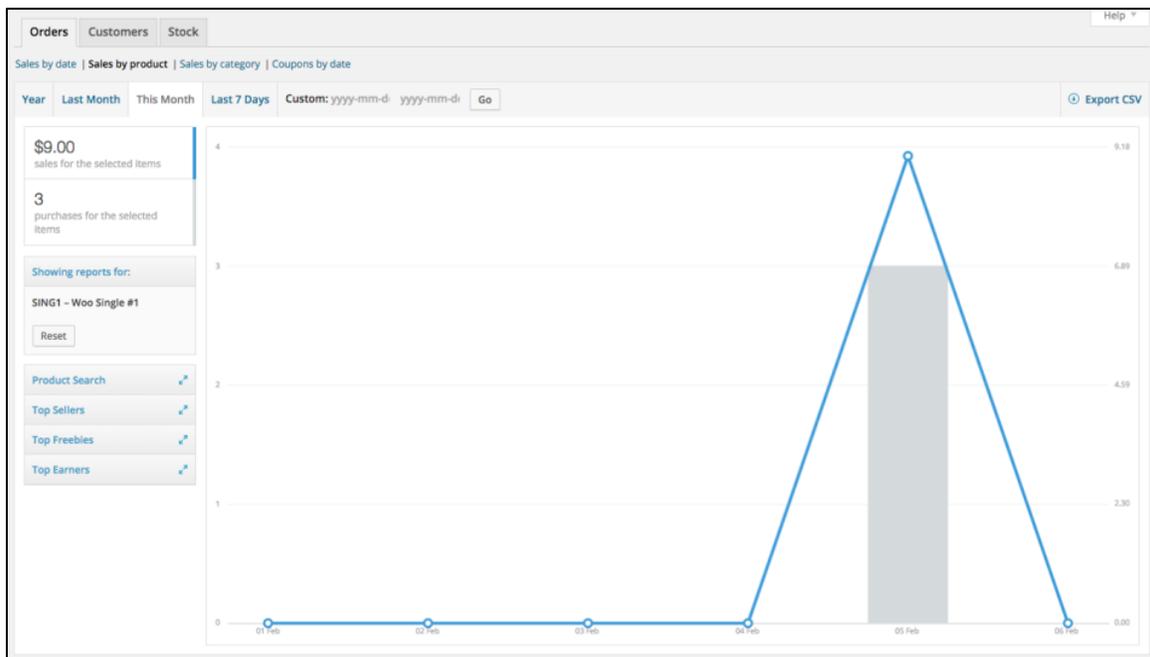
You can select any product from your store to view sales data, and again drill down into by year, last month, this month, last 7 days, and custom.
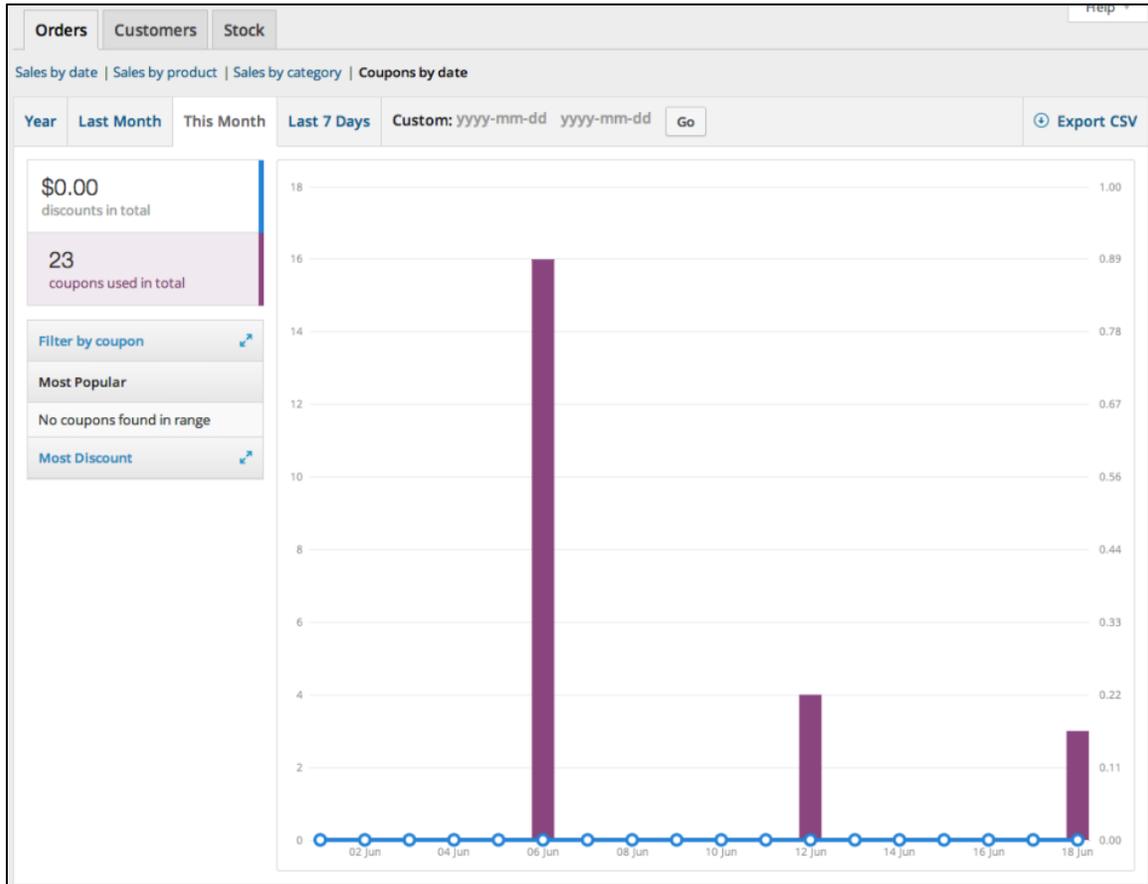
Sales by category

Just as sales by product works, you can see the sales numbers by categories as well.

Coupons by date

Again, similar to the previous sections, coupons by date. Showing the discounts in total, number of coupons used, and the ability to filter by coupon, see the most popular coupons, and ones giving the most discounts.

Customers

The next tab you have is to view customer reports with Customers vs. Guests and Customer List options to further drill down into customer info again by year, last month, this month, last 7 days, and custom.

- In **Customers vs. Guests**, customers are paying users who register on your website
- By consequence, **Customer List** will only show registered users
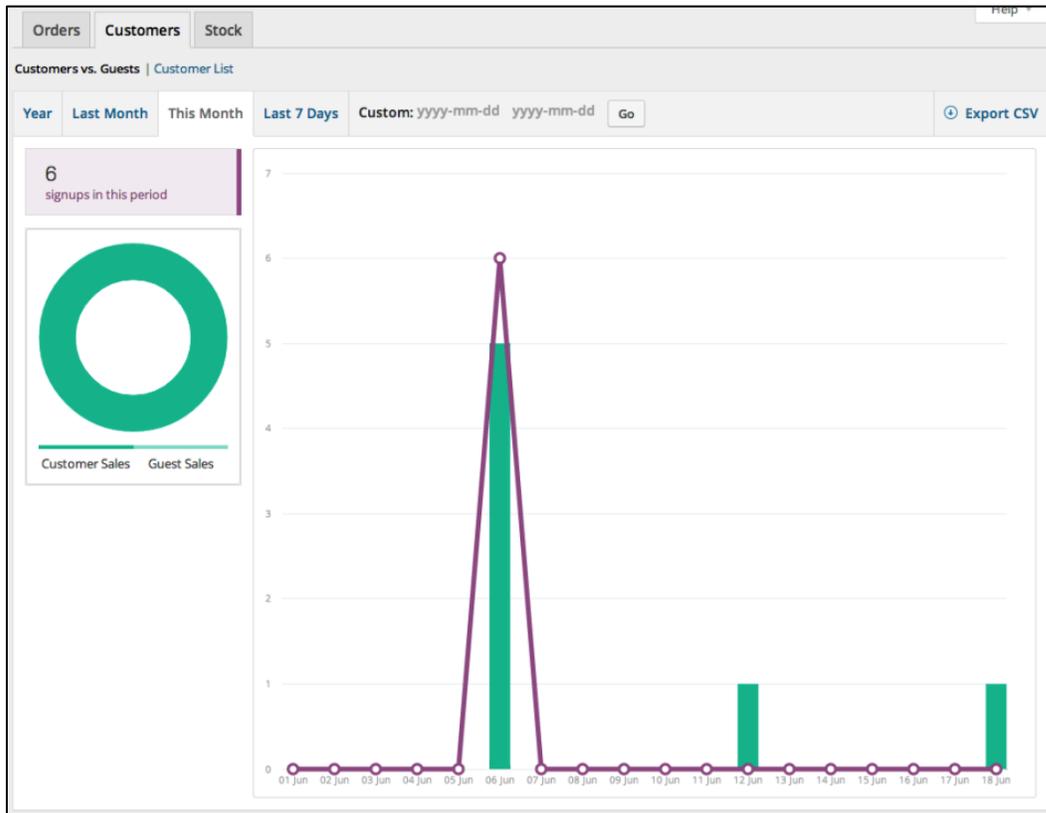
Stock

Similar to the dashboard widget, stock reports list your low stock and out of stock items as well as the actual quantity left in stock.

Note: Everything is reset if you delete prior sales orders and then go to the order "Trash" and permanently delete them. Because all sales graphs and sales logs are dynamically generated, you then need to clear your browser cache.

For more information on sales reports please review the following page and video within Woo-Commerce: https://docs.woothemes.com/document/reports/

Please note that some aspects of WooCommerce are only available to Closerware Support.