Shuup Guide Documentation

Release 0.0

Shoop Ltd.

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Contents

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CHAPTER 1

Using the Shuup Admin

1.1 Navigating the Admin Menu

The Shuup Admin menu contains a list of categories. Each category can contain one or more links to admin pages for specific sections.

If there is only one option for a category, clicking the category name will automatically open that page. If there are multiple options, clicking the name will expand the category to show all options.

1.2 Sorting and Filtering Tables

Different pages in the Shuup Admin may contain a table of different items (such as customers, orders, or products). Rows within this table may be sortable or filterable, depending on the section.

If a column is sortable, you will be able to change the sorting behavior (unsorted, alphabetical, or reverse alphabetical) by clicking the name of the column.

If a column is filterable, a text box or other filter fields will be available to adjust the filters. Rows that do not match the filter will not be displayed.

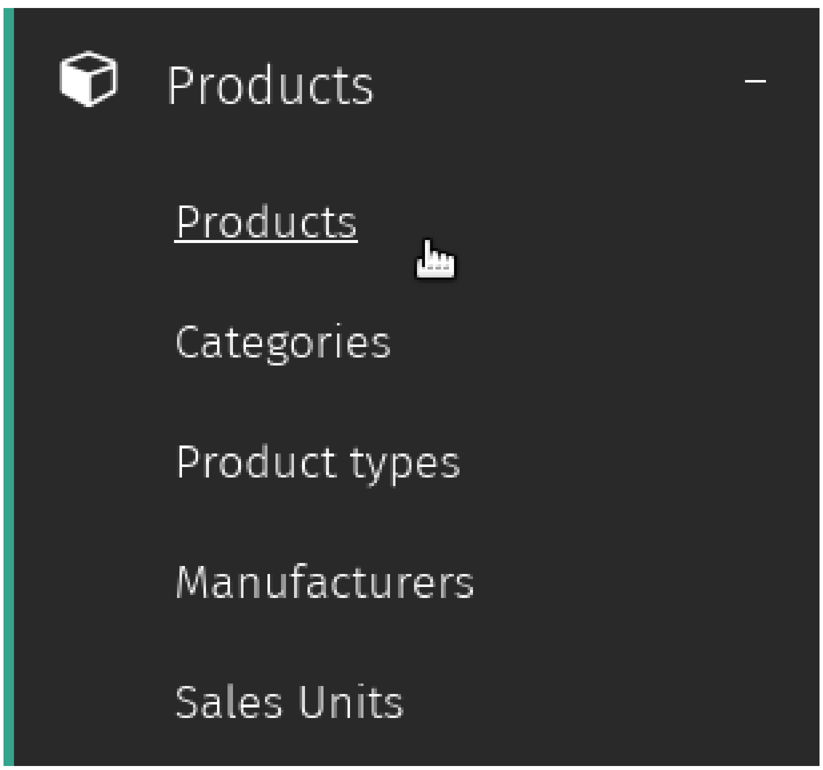
CHAPTER 2

Products

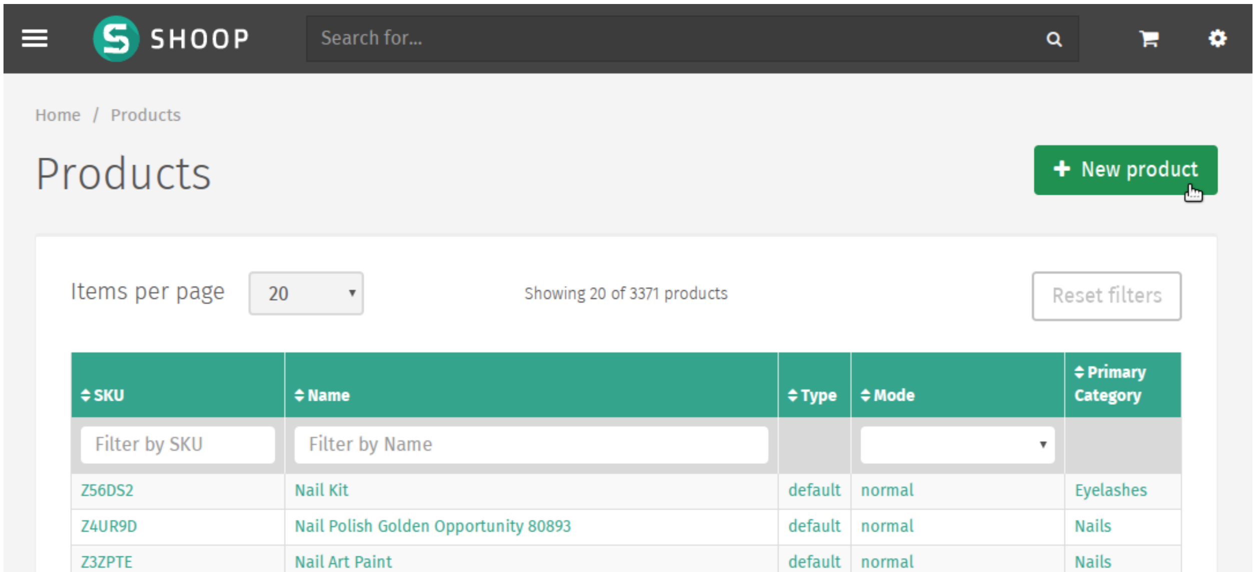
2.1 Adding Products

The Shuup Admin provides a simple interface for adding products to your shop.

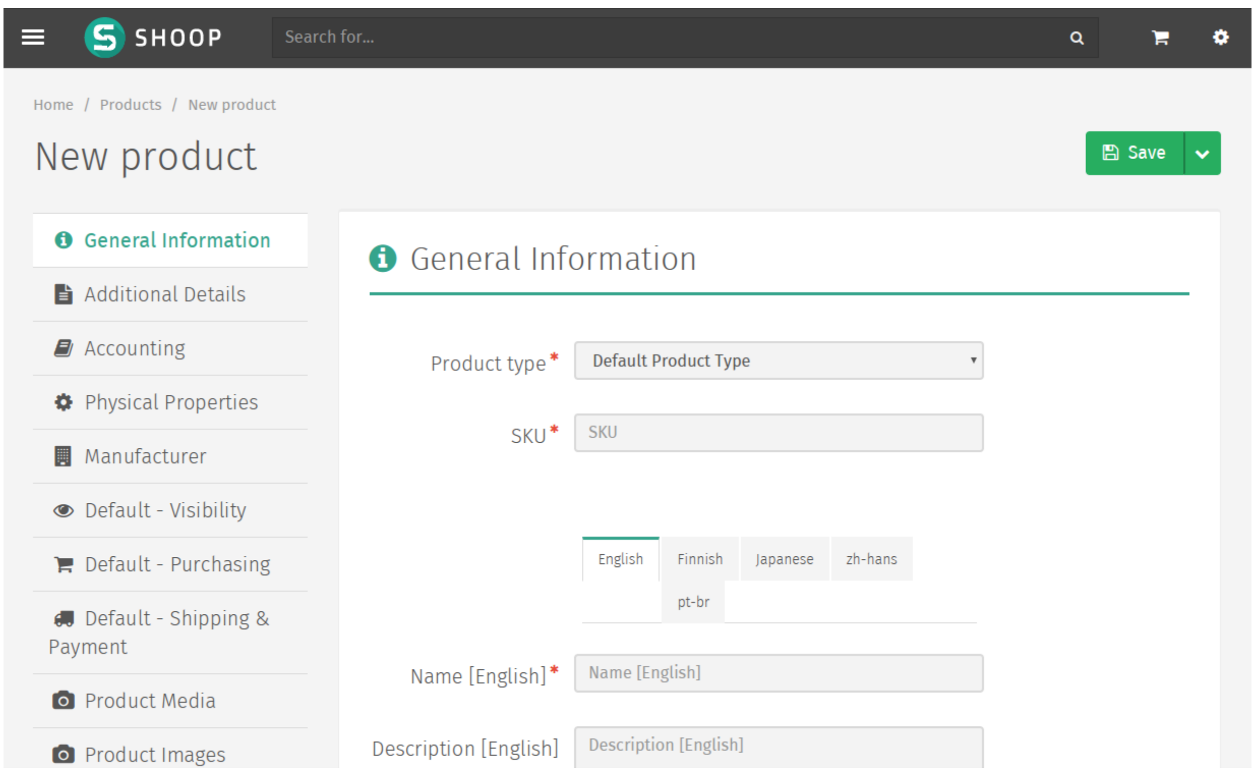
To navigate to the Products section of the Shuup Admin, open the Admin menu and select the *Products* section under the *Products* category.



On the *Products* page, you will see a list of all of the products currently in your shop. In the upper right-hand corner, there is a button labelled *New product* for creating new products. Clicking this will take you to the new product form, where you can enter information about your new product.



2.1.1 New Product Form



Like other Shuup Admin forms, required fields are marked with a red asterisk and missing or invalid fields will be highlighted red upon form submission.

The left side of the form contains a number of sections of the form (shown as tabs), and selecting a tab will present the different fields and options for that section.

Basic Information Tab

Basic Information The top section of the form contains most of the basic product information and settings including product name, description, type as well as a product image uploader and selector.

Current Shop The name of this section is the relevant shop's name (initially *Default*). It has the default price, font-end visibility and category.

Additional Details Tab

Miscellaneous information regarding the product, such as the product's shipping mode, tax class, barcode information, the product physical dimensions and unit information as wells as the slug and relevant keywords.

Manufacturer

Selection choice for the product's manufacturer.

Shop-Specific Additional Tab

The names of this tab are preceded by the relevant shop's name (initially *Default*). It strictly contains shop related information such as front-end visibility settings for a specific shop, pricing, suppliers, multiple-purchase settings.

Contact Group Pricing Tab

Pricing settings based on contact groups. If a contact belongs to multiple groups, they will be presented the lowest price of the groups to which they belong. These groups are defined in Contacts Settings – Contact Groups

Note: Contact Group pricing is currently not configurable for specific shops.

Contact Group Discount

Individual discount amounts for different contact groups. The discount amount may be visible on the storefront. These groups are defined in Contacts Settings – Contact Groups

2.1.2 Saved Product Form

Once the product has been successfully saved, additional options will be available from the product edit form.

Attributes Tab

See *Attributes*.

Product Files

Product-related file uploader and selector.

Product Images

Product image uploader and selector.

Stock Management Tab

For stocked product, this should display any stock-related management tasks depending on the product's supplier settings.

Active Campaigns

This section shows all the active campaigns the product is in.

Orders Tab

Show recent orders containing the product.

2.2 Product Types

Product Types define classes products and are used to associate different sets of *attributes* to a particular product, depending on its product type.

For example, a product of type *Book* might require specific information such as author, ISBN, publisher, etc., while a product of type *Clothing* might require size, color, or other custom attributes.

2.3 Attributes

Shop owners can define their own attributes for *Product Types* from the Attributes Admin.

1. Navigate to the Attributes admin page by clicking *Attributes* under the *Shops* category from the Shuup Admin menu.
2. Click the *New attribute* button in the upper right-hand corner
3. Enter a name and **unique** identifier for the attribute, and select the type, visibility mode, and searchability for the attribute
4. Select the *Product Type* page (under the *Shops* category) from the Shuup Admin menu
5. Select the Product Type from the menu
6. Under the *Attributes* tab, check the box next to the attribute name for your new attribute.

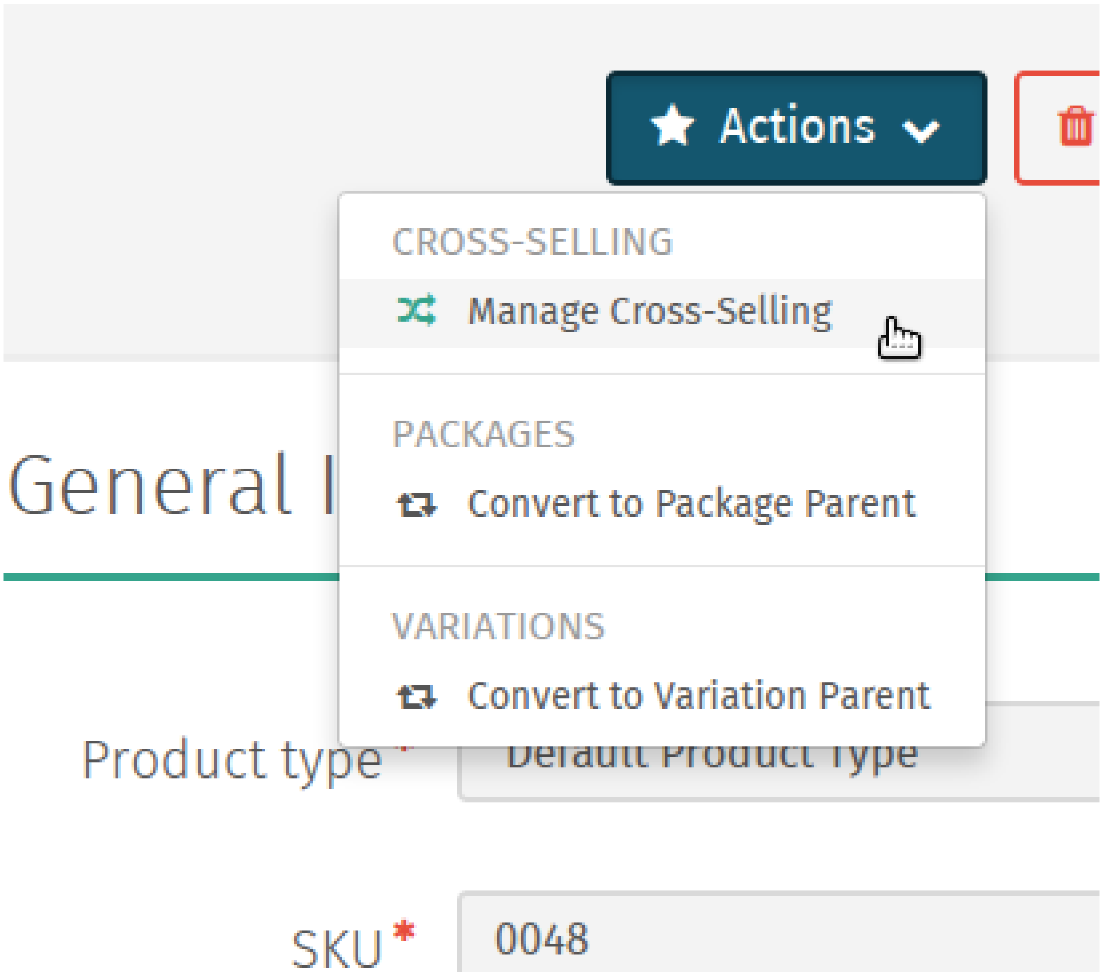
Tip: By default, new attributes are displayed on the product page, but there are multiple visibility options that can be selected form the Attributes edit page.

2.4 Cross-Selling

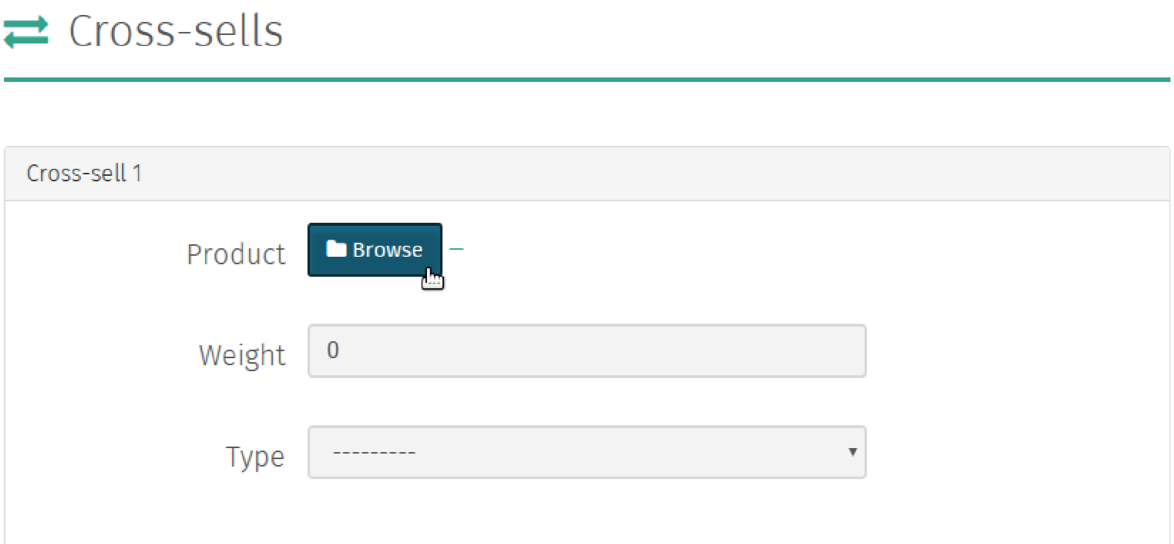
2.4.1 Adding Cross-Sells

Related products can be sold together on Shuup's storefront by using Shuup's cross-selling feature. These relationships can be managed from the Shuup Product admin.

To add a relationship for a particular product, navigate to the product's page and select *Manage Cross-Selling* from the *Actions* menu.



Products can be selected by clicking the Select Product button and clicking on the desired product from the product list.



Once the product has been selected, the relationship's weight can be set.

The relationship weight is used when calculating which products will be displayed together on the shop front. The higher the relationship weight the more likely the products are to be displayed together.

Finally, you can select one of the following relationship types:

Recommended Products are recommended to be bought together.

Related Products are related.

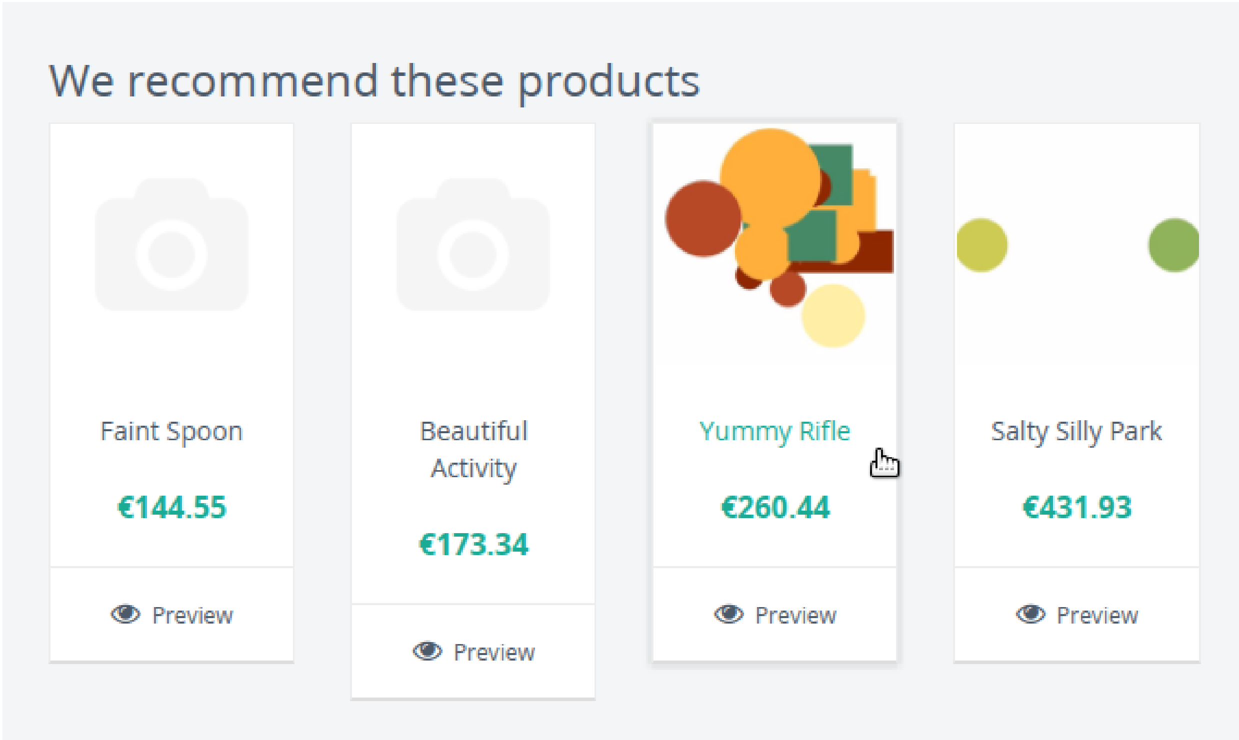
Computed Primarily reserved for use by add-ons.

Bought With Primarily reserved for internal use. These relationships are automatically calculated by automated Shuup tasks, however if these tasks have not been configured by the server administrator, they can be defined manually here.

Note: Only five relationships can be added at once. However, more can be added once these relationships have been saved. This can be repeated as necessary.

2.4.2 Displaying Cross-Sells

Once defined in the Product admin, cross-sell relationships can be displayed on the store front using a plugin.



Follow the following steps to display a relationship type on the store front:

1. Make sure you are logged in as an administrator and navigate to the store front.
2. Navigate to any product page.
3. Click on the *Edit Page* button in the upper right-hand corner of the page.
4. Select one of the placeholder boxes.
5. Add a new row or new column for your plugin.
6. Select *Product Cross Sells* from the plugin dropdown menu.
7. Add a title if desired, select the relationship type, and set the count as the number of products to be displayed at once. You can also select whether or not to hide out-of-stock or unorderable items.
8. Save the plugin.
9. Publish your changes.
10. Click the *Exit Edit* button in the upper right-hand corner of the page
11. Your products should now appear in the placeholder on the product's page.

Note: Cross-sell relationships are only one-way and must be manually added to any related product you would like to relate back to the original product.

Note: If there are no relationships of the selected type for a particular product, the plugin will not be displayed.

2.5 Package Products

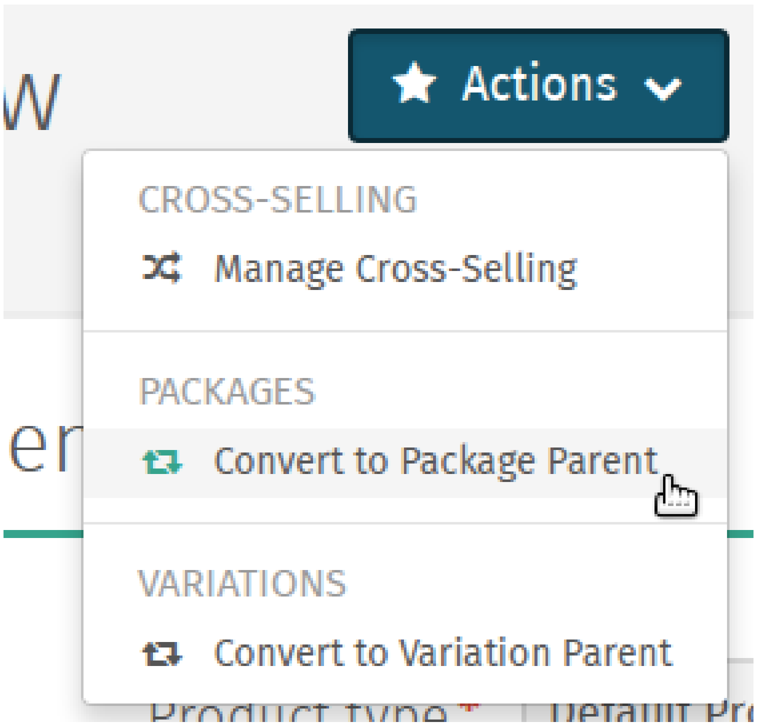
Package products are used to package a number of related products to be sold as a single product package.

These products are stored a single package *parent*, which can be linked to multiple package *children*.

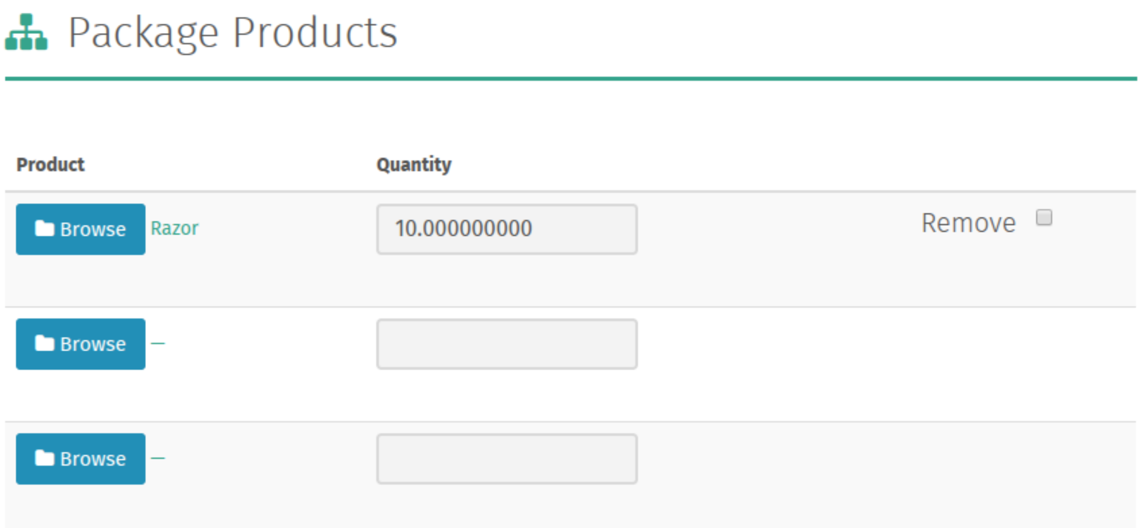
Stock for child products is automatically updated when the package is purchased. Pricing, discounts, etc., of the parent product can be managed like any other product.

To convert a product to a package parent:

1. Navigate to the parent product's edit page and select *Convert to Package Parent* from the *Actions* dropdown menu.



2. Click the *Browse* button to add child products to the package. Enter the quantity of each product to include in the package.



3. Click *Save* to save the package's child product information.

2.6 Variation Products

Some products may be available to customers in a number of different variations, and customers should be able to choose from these different available options when adding products to their cart.

Shuup provides two different types of product variations, *simple variations* and *variable variations*.

2.6.1 Simple Variations

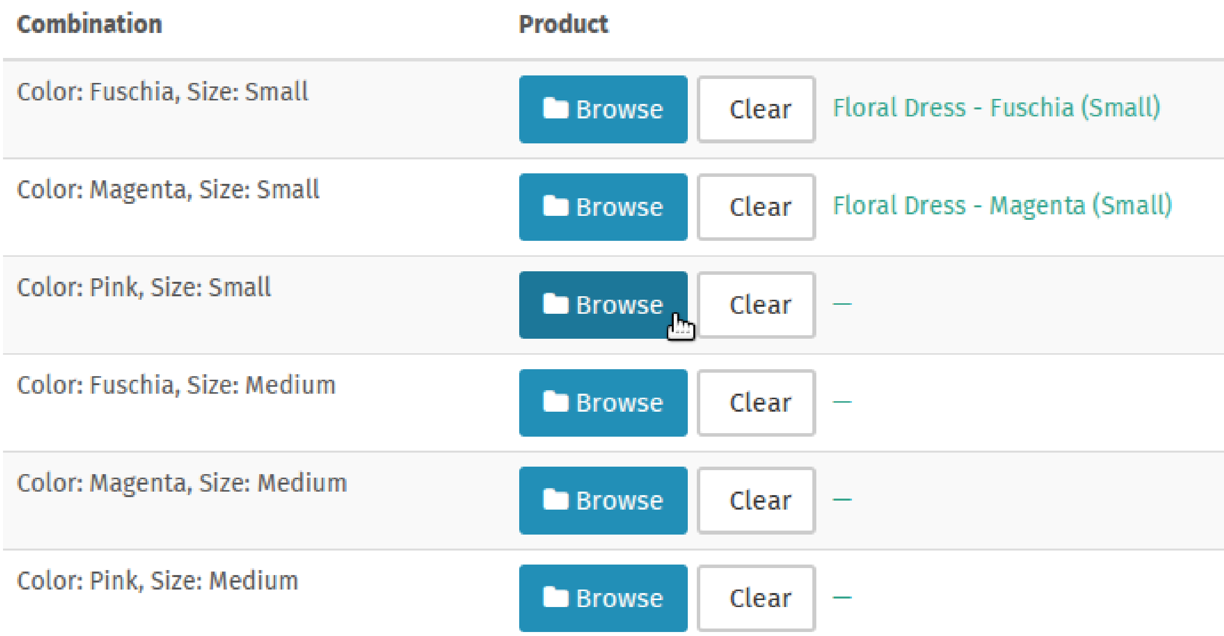
Simple variations are general variations that are displayed on the product page as a simple drop-down menu where the user can select from any of the available variation product choices.

2.6.2 Variable Variations

Variable variations allow you to define child products based on a specific variable. For example, a product might have variables such as *size* or *colors*, with different options for each, and the customer should be able to select from a combination of these options.

To add variable variations:

1. Navigate to the parent product's edit page and select *Convert to Variation Parent* from the *Actions* menu.
2. Select *Variables* from the left-hand menu
3. Click *Add new variable* to add a new variable form
4. Enter the variable name
5. Click *Add new value*
6. Enter names for possible values
7. Continue for other variables/values as needed
8. When finished, click *Save* in the toolbar



Once these variables have been added, "child" products can be linked for each combination of variables. For example, if there are 3 *size* values and 2 *color* values, there will be 6 child products, one for each *size*, *color* combination.

Tip: Names for child products should follow a consistent naming scheme indicating the variable value for each product.

Tip: Variable variations can be converted to simple variations by clicking *Convert to simple variation* on the Variation view toolbar. However, all variable and value information will be lost.

2.6.3 Managing Variations

Once a product has been converted to a simple or variable variation parent, it can be managed by selecting *Manage Variations* from the *Actions* menu for either the variation parent's admin page or the admin page for any of the child variation products.

CHAPTER 3

Multivendor

Note: The Multivendor feature is currently only available through a license. For more information, contact support@shuup.com

The Multivendor Addon enables multiple features that facilitate the management of a multivendor marketplace. The marketplace owner can manage several Vendors more easily while vendors can select the products they want to sell, their prices as well as manage their stocks.

3.1 User-roles and Permissions

Permissions are the basic and Initial configuration all modern application should have. They are created to restrict features to a certain group of users. Shuup restrict the features using *Permission Groups*. A user can be linked to many permission groups. As the permissions must be explicitly granted (you must check what features are allowed to access), a user will accumulate all the permissions from all the linked permission groups.

Common user roles for multivendor:

- Admin: (superuser). Superusers has all the permissions and can see all admin modules available.
- Staff: Can see admin modules defined for the staff group. The main role is to manage vendors, products and orders.
- Vendor: Can manage own products and manage vendor order lines, see vendor reports.

These roles are already created in the multivendor environment and can be tweaked to meet the project requirements.

See *Permission Groups* for more general informations on Permission Groups.

3.2 As a Vendor

3.2.1 Vendor Registration

1. From the marketplace home page, navigate to */v/register* to access the registration form.
2. Fill out the Vendor information part with the name and address of your store, the Owner part is about you and the Login Information will allow you to access the admin Panel of the your store in the marketplace. If need be, you can update those informations later in the Vendor *Settings*.
3. Click Register.

Notifications

After the registration, you will receive an email notification confirming that your registration is complete.

Note: You will not be able to log into your account on the marketplace until a marketplace staff member approves your registration.

You will get another email notification when your registration is approved.

3.2.2 Admin Panel

From the marketplace home page, navigate to */admin*, type in your username and password and click the Login button to access the admin panel. You will be shown your dashboard with a summary of your sales.

3.2.3 Settings

Navigate to the *Vendor Settings* page by clicking *Vendor Settings* under the *Settings* category from the Shuup Admin menu.

You can update the name, description and logo of the Vendor and use the tabs on the left-hand side to update the contact address and the opening periods.

Click on the *Go to vendor page* button to be taken to your vendor page on the store front.

3.2.4 Product Management

Navigate to the *Vendor Products* page by clicking *Products* under the *Products* category from the Shuup Admin menu.

On this page, you will find all the products available to the marketplace. To find a product more easily, you can filter them by name. You can manage your stocks, start and stop selling products and set the price. If no price is set, the default price will be used.

3.2.5 Stock Management

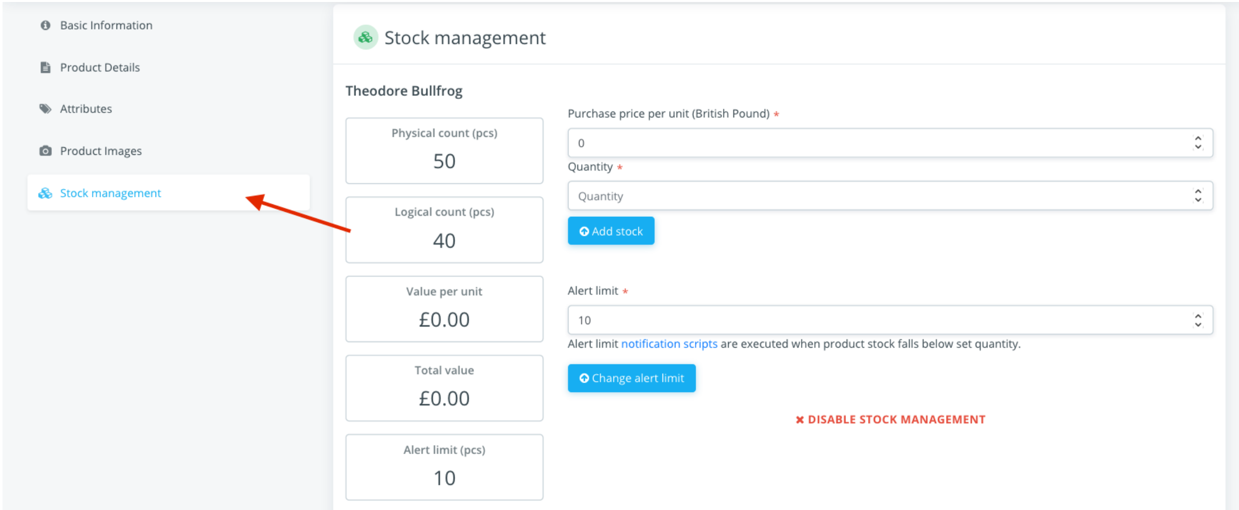
Stock management is a crucial feature that all e-commerce platforms must have. Shuup is designed to be the more extendable as possible.

To a product be able to be purchased, it *must* have at least a *Supplier* set. Suppliers are responsible to return whether a product can be purchased for a given quantity (and other context values such as the current customer).

In the multivendor environment, each Vendor is a Supplier behind the scenes, and the vendor can manage only the products it supplies.

3.2.6 Managing Stocks

To manage stocks, go to *Product* > *Products*. Pick a product and click on the *Stock Management* section.



On this management panel it is possible to update stocks, alert limit and disable the stock management for this specific product.

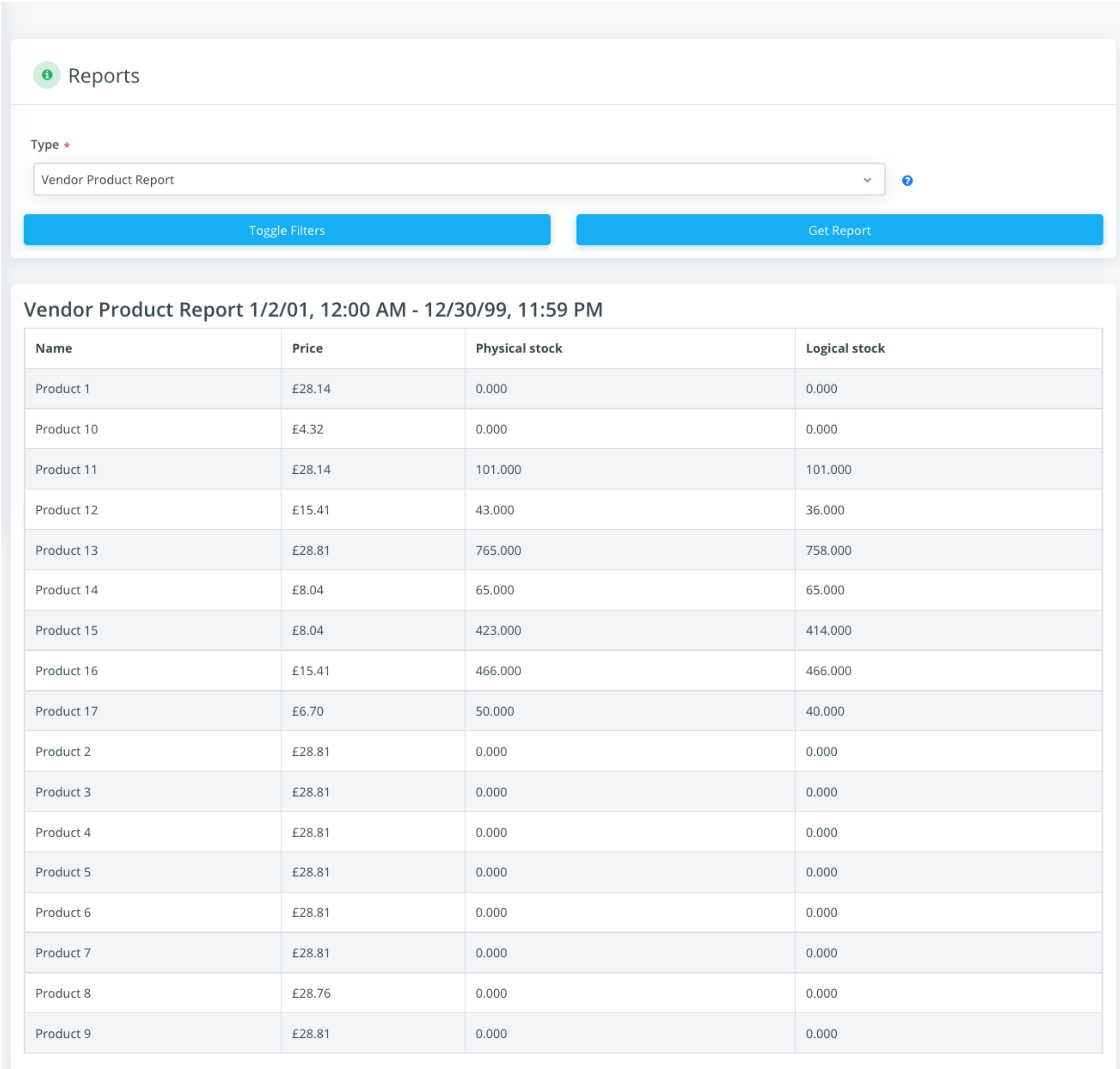
The initial management status is configured per-project. If the stock management is disabled, the product can be purchased unlimitedly – no stocks are checked.

To update stocks, fill the *Quantity* field and press the *Add stock*. The purchase price can be optionally filled for future reports. Stock will be incremented if the quantity is a positive number and decremented if the quantity is a negative number.

The alert limit can also be set and when Notifications addon is enabled, it will trigger an event that can be configured send email to users or any other logic.

3.2.7 Stock reports

Stocks can be listed in a simple way using a stock report. Go to *Reports* and select the *Vendor Product Report*, fill the filters if needed and press the *Get Report button*.



Vendor Product Report 1/2/01, 12:00 AM - 12/30/99, 11:59 PM

Name	Price	Physical stock	Logical stock
Product 1	£28.14	0.000	0.000
Product 10	£4.32	0.000	0.000
Product 11	£28.14	101.000	101.000
Product 12	£15.41	43.000	36.000
Product 13	£28.81	765.000	758.000
Product 14	£8.04	65.000	65.000
Product 15	£8.04	423.000	414.000
Product 16	£15.41	466.000	466.000
Product 17	£6.70	50.000	40.000
Product 2	£28.81	0.000	0.000
Product 3	£28.81	0.000	0.000
Product 4	£28.81	0.000	0.000
Product 5	£28.81	0.000	0.000
Product 6	£28.81	0.000	0.000
Product 7	£28.81	0.000	0.000
Product 8	£28.76	0.000	0.000
Product 9	£28.81	0.000	0.000

The report shows the product name, price and the current stock status. Logical stock is the number of products available for sale and Physical stock is the number of products that are physically in stock and they are waiting to be shipped. Both numbers will be equal when all products from their orders are fully shipped.

See *Stock Management* for more general information about Stock Management.

3.2.8 Orders

Navigate to the *Vendor Orders* page by clicking *Vendor Orders* under the *Orders* category from the Shuup Admin menu.

On this page, you will find all the orders that have been made for the vendor. There are multiple filters available to single orders out.

Click on an order to see the order information like the order number and reference, the customer name, email, billing and shipping address as well as the product name, quantity and price.

Depending on your marketplace configuration, it might also be possible to create a shipment, set the tracking code or the order status.

3.3 As a Marketplace Staff Member

3.3.1 Create a new Vendor

1. Navigate to the Vendors Management page by clicking *Vendor Management* under the *Settings* category from the Shuup Admin menu.
2. Click on the + *Create new* button.
3. Fill out the Vendor's name. You can also add a description, a logo and management users. Make sure the *Enabled* and *Approved* checkboxes are selected.
4. Click on the *Contact Address* tab on the left-hand side to fill out the contact name and address.
5. You can set up opening periods in the *Opening periods* tab on the left-hand side.
6. Click on the *Save* button.

The Vendor will receive an email notification for the registration and another one for the approval if the *Approved* checkbox was selected during the creation process. Vendors can log in their admin panel as soon as they are approved.

See *Notifications* to set up customized Notifications.

3.3.2 Approving a Vendor

1. Navigate to the Vendors Management page by clicking *Vendor Management* under the *Settings* category from the Shuup Admin menu.
2. Select the Vendor you want to approve.
3. You can edit the Vendor's informations such as their name, description logo, contact address and opening periods.
4. Select the *Approved* checkbox.
5. Click *Save*.

The Vendor will receive an email notification once their registration is approved. Vendors can log in their admin panel as soon as they are approved.

See *Notifications* to set up customized Notifications.

3.3.3 Orders from all Vendors

Navigate to the *Vendor Orders* page by clicking *Vendor Orders* under the *Orders* category from the Shuup Admin menu.

On this page, you will find all the orders that have been made for all the vendors in the marketplace. There are multiple filters available to single orders out.

Click on an order to see the order information like the order details, the customer name, email, billing and shipping address as well as the product name, quantity and price.

Depending on your marketplace configuration, it might also be possible to create a shipment, set the tracking code or the order status.

See *Orders* for more information.

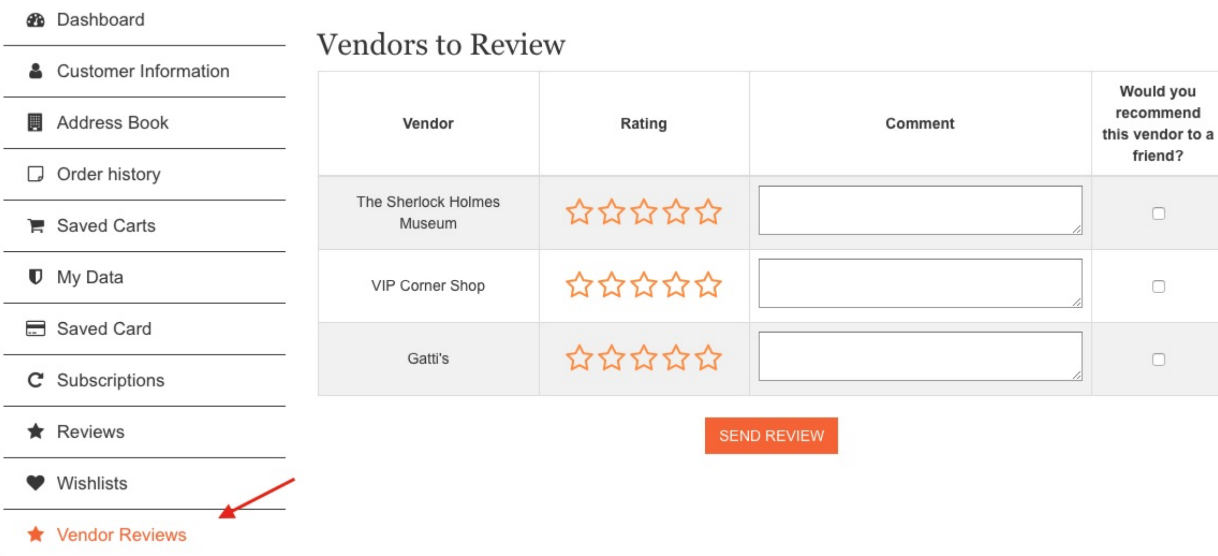
3.4 Vendor Reviews

Vendor reviews module stores users' ratings for vendors.

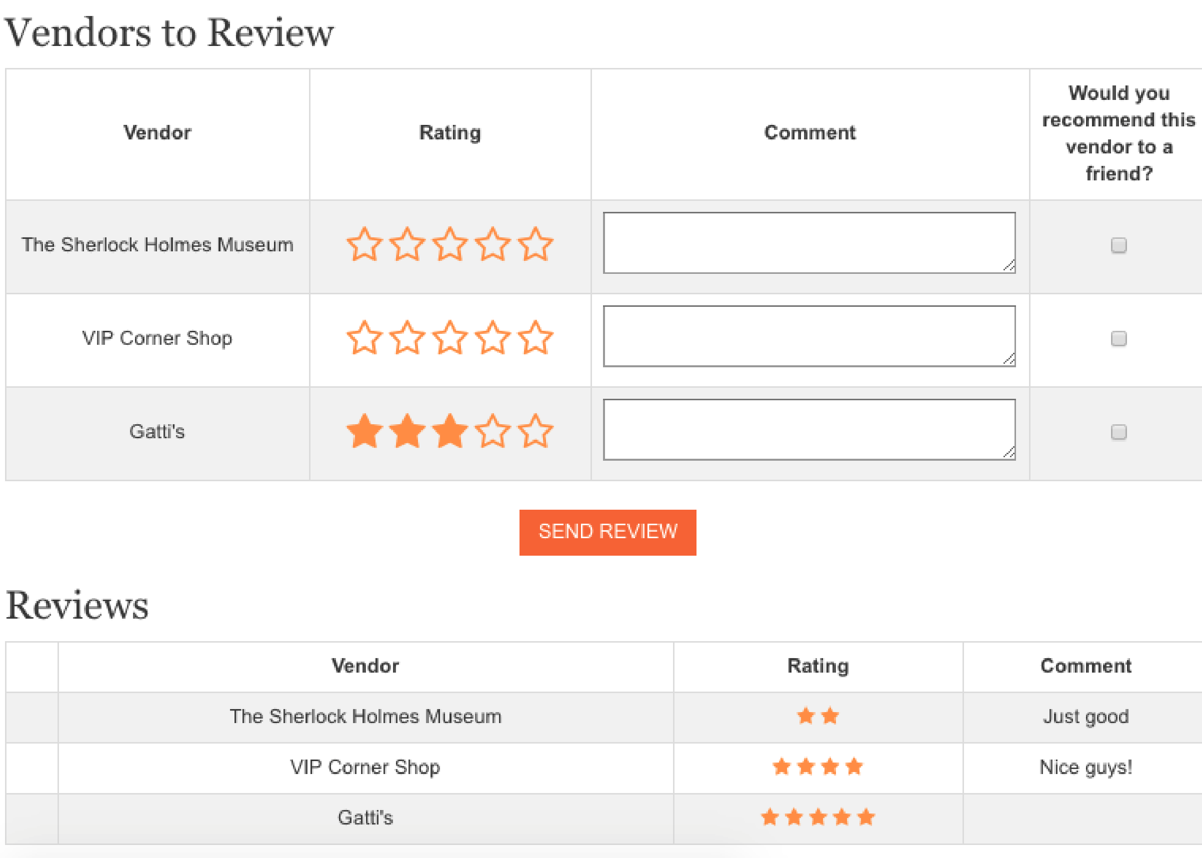
Requirements to a review be visible in the storefront: - Users can only create reviews for vendors of completed orders - The review should be approved by staff users - Xtheme plugin must be placed in placeholder inside the vendor detail view

3.4.1 Creating a vendor review

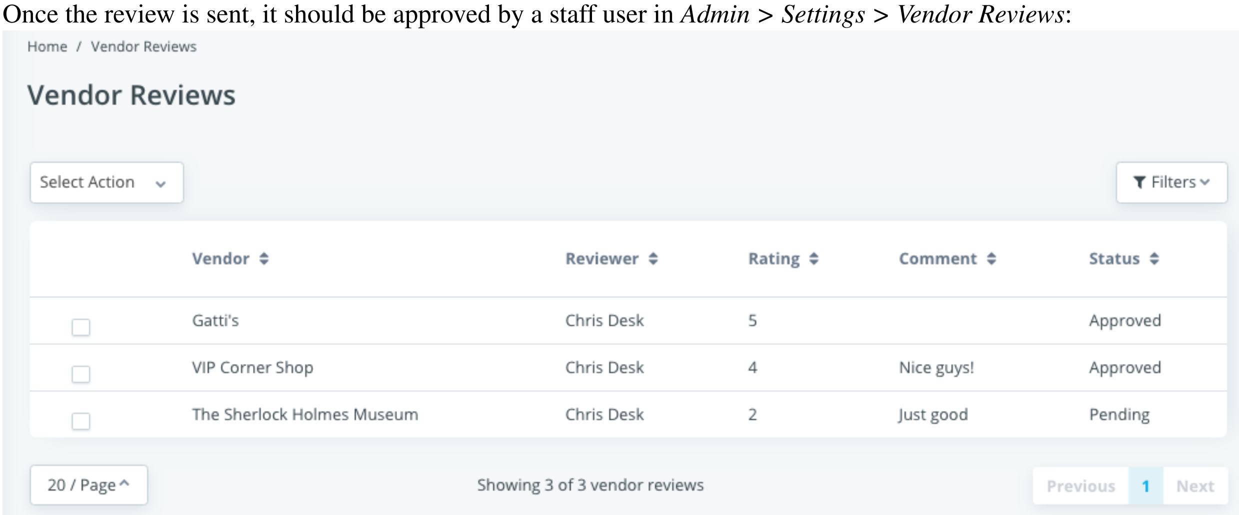
After the user has placed his order and the order is in a completed status, the user can create the review in the *Customer Dashboard*:



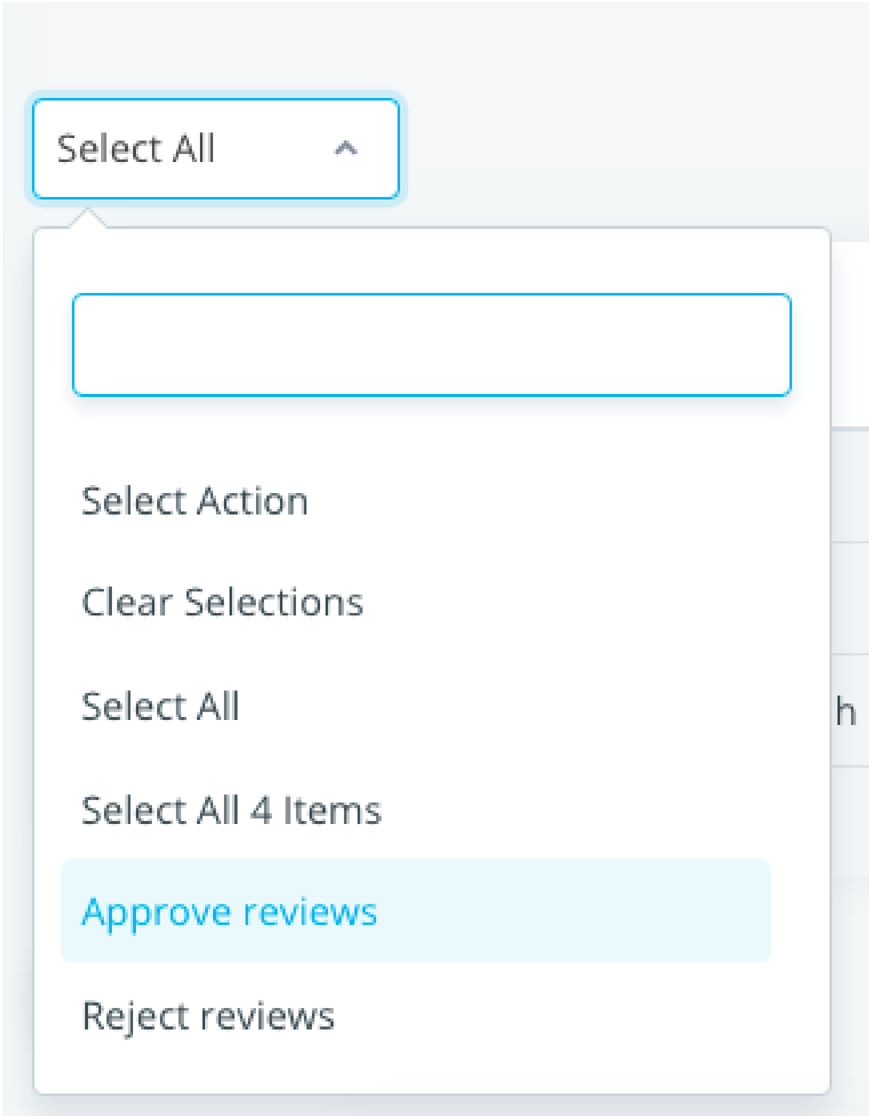
The user must select the star rating also add some comment and check whether he would recommend that vendor to a friend. After that the review will be available for visualization. The user can change the vendor review at any time by submitting the reviews again.



Once the review is sent, it should be approved by a staff user in *Admin* > *Settings* > *Vendor Reviews*:



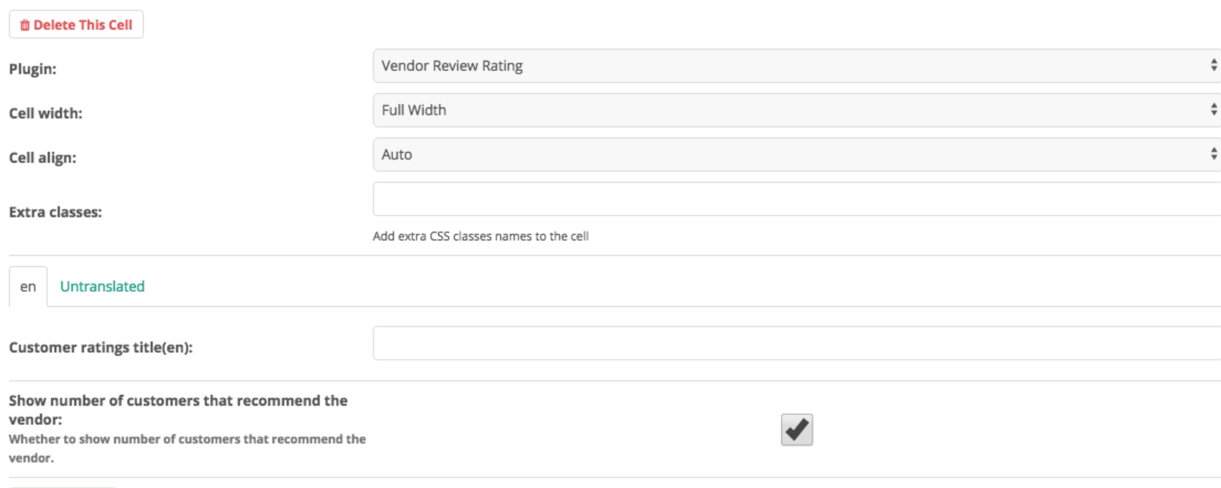
The staff must select all the reviews he wants to approve/disapprove and select the respective action in *Mass Action dropdown*:



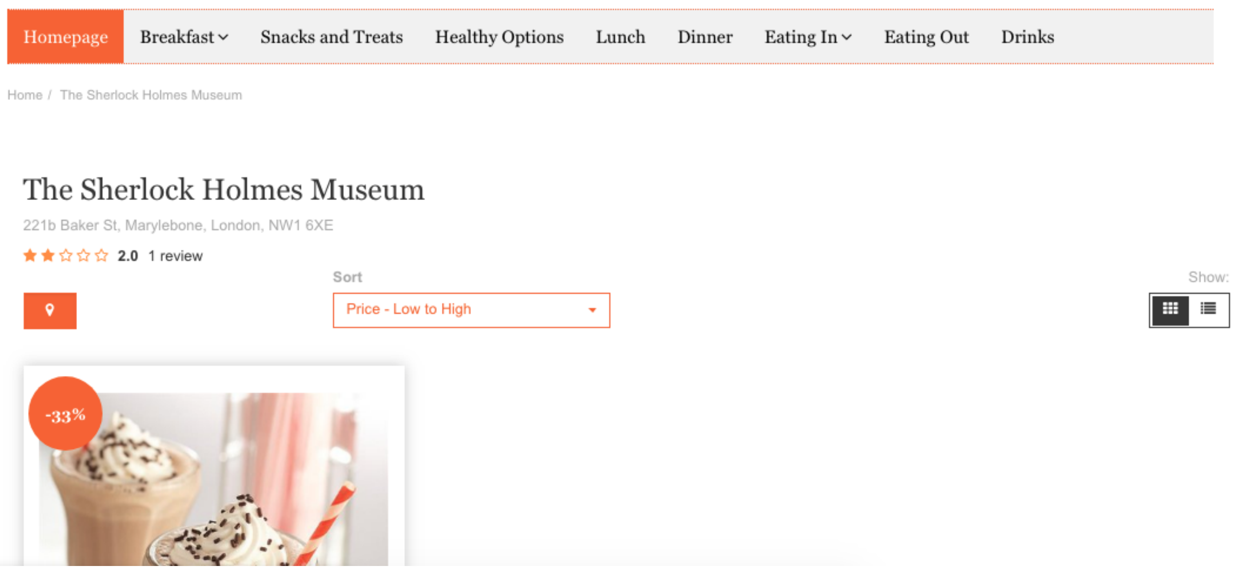
Done. After the review is approved, it will be visible at the storefront.

3.4.2 Configuring the plugins

The module provides a plugin to render the customer ratings in places where a vendor is available in context, like the Vendor Detail page. You must add the *Vendor Review Rating* plugin and configure it as needed:



After all these configurations, the vendor review module will be working as it should.



CHAPTER 4

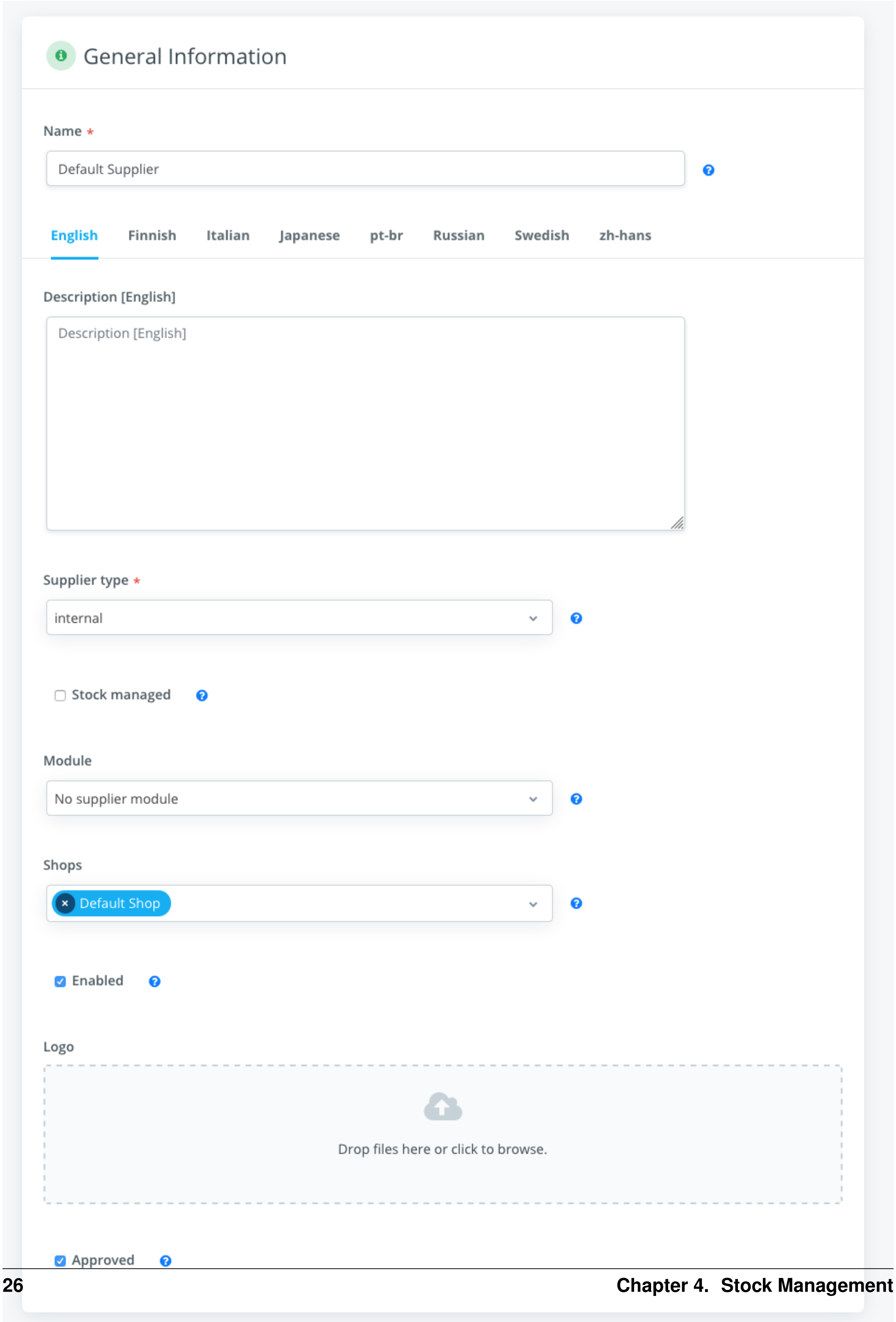
Stock Management

Stock management is a crucial feature that all e-commerce platforms must have. Shuup is designed to be the more extendable as possible.

To a product be able to be purchased, it *must* have at least a *Supplier* set. Suppliers are responsible to return whether a product can be purchased for a given quantity (and other context values such as the current customer).

4.1 Managing Suppliers

To manage suppliers, go to *Shops* > *Suppliers*. Click to create a new supplier or edit the current one if your installation only allows a single supplier to be used.


General Information
Name *
Default Supplier
English
Finnish
Italian
Japanese
pt-br
Russian
Swedish
zh-hans
Description [English]
Description [English]
Supplier type *
internal
Stock managed
Module
No supplier module
Shops
Default Shop
Enabled
Logo
Drop files here or click to browse.
Approved

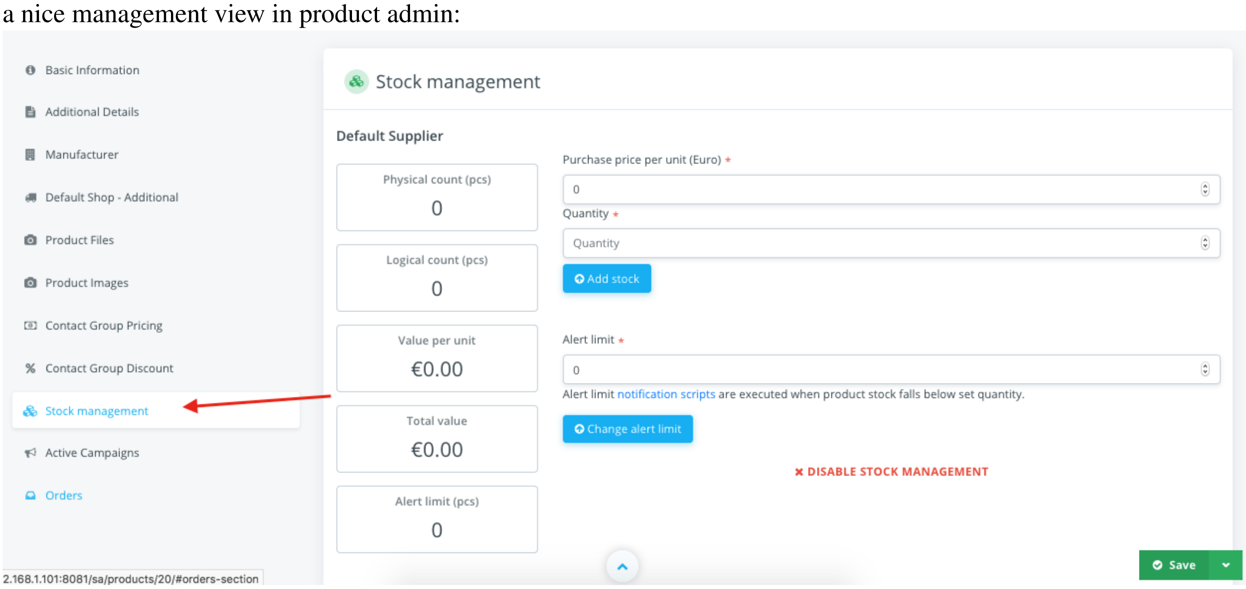
Suppliers have a *module* attribute that allows custom implementation of stock handling, like fetching the stock status from an ERP and updating the stocks through an API call.

Shuup has a simple supplier implementation built-in, it keeps the total number of items locally and manages all the events to add/subtract the totals – it is enough for the majority cases.

Besides that, the supplier has flags like *Enabled* and *Approved*, they just make the supplier available or not in the platform.

The supplier also has a Stock Managed flag, which dictates whether this supplier actually manages stocks. If that is disabled, products can be unlimited purchased – no stocks check. If the flag is enabled, it is also possible to disable stocks check for specific products. The flag is enabled by default.

Once the supplier is created, it can be attached to products. When the simple supplier module is being used, it provides a nice management view in product admin:

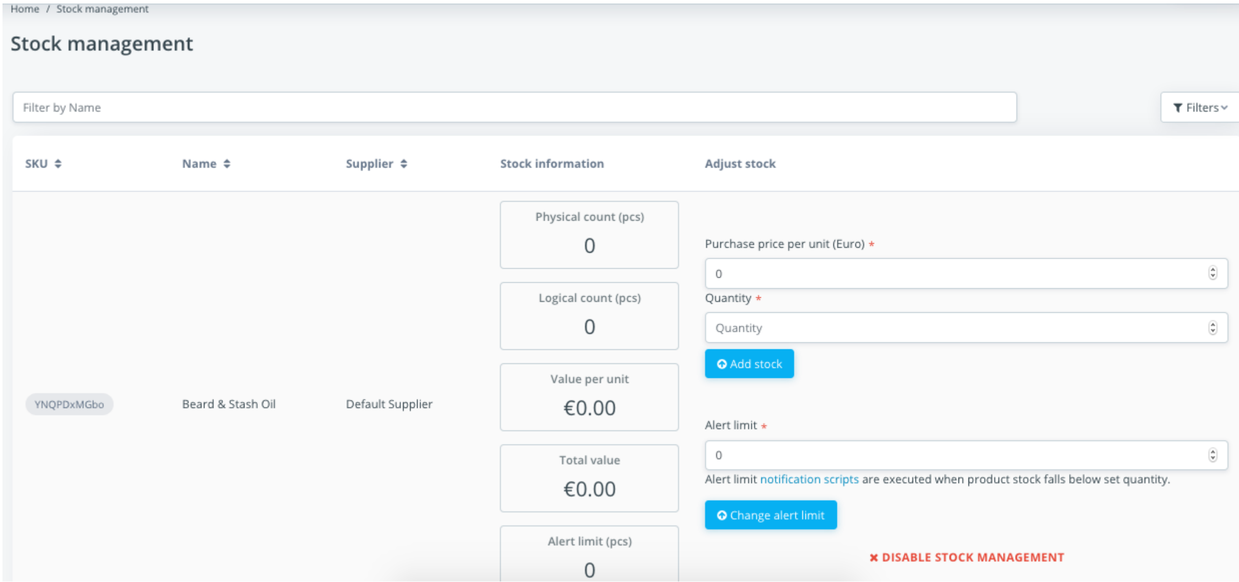


On this management panel it is possible to update stocks, alert limit and disable the management for this specific product.

To update stocks, simple fill the *Quantity* field and press the *Add stock*. The purchase price can be optionally filled for future reports. Stock will be incremented if the quantity is a positive number and decremented if the quantity is a negative number.

The alert limit can also be set and when Notifications addon is enabled, it will trigger an event that can be configured send email to users or any other logic.

It is also possible to manage several products at once in *Shops > Stock management*.


Home / Stock management
Stock management
Filter by Name
Filters
SKU
Name
Supplier
Stock information
Adjust stock
Physical count (pcs)
0
Logical count (pcs)
0
Value per unit
€0.00
Total value
€0.00
Alert limit (pcs)
0
YNQPDxMGbo
Beard & Stash Oil
Default Supplier
Purchase price per unit (Euro) *
0
Quantity *
Quantity
Add stock
Alert limit *
0
Alert limit notification scripts are executed when product stock falls below set quantity.
Change alert limit
DISABLE STOCK MANAGEMENT

CHAPTER 5

Product Reviews

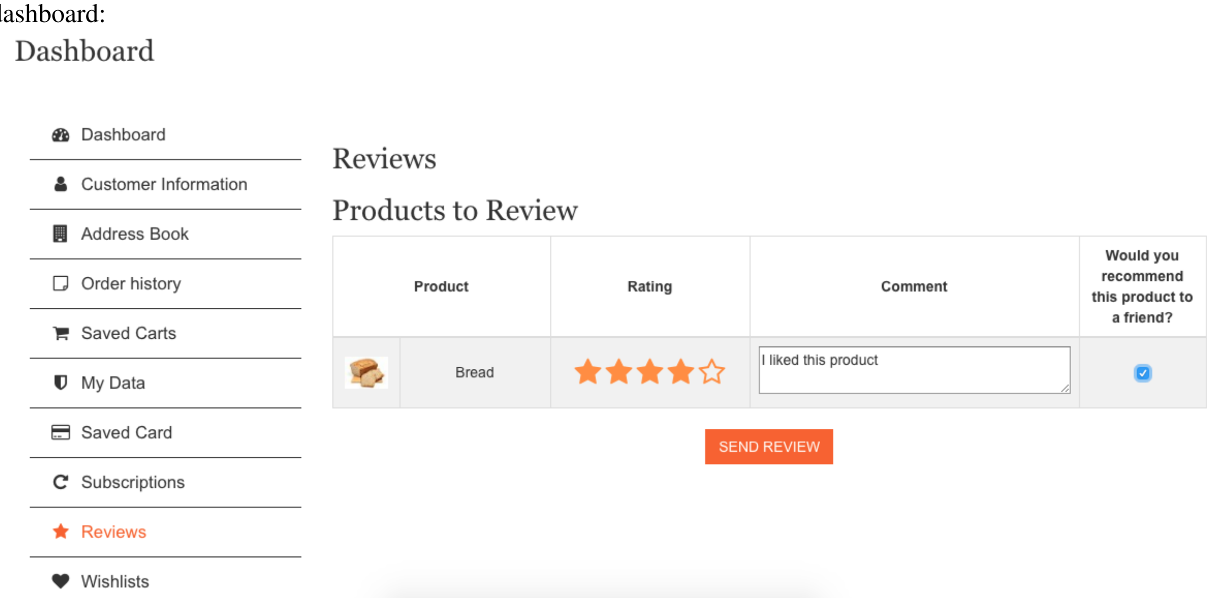
Product reviews module stores users' ratings for products that were ordered by them.

Requirements to a review be visible in the storefront:

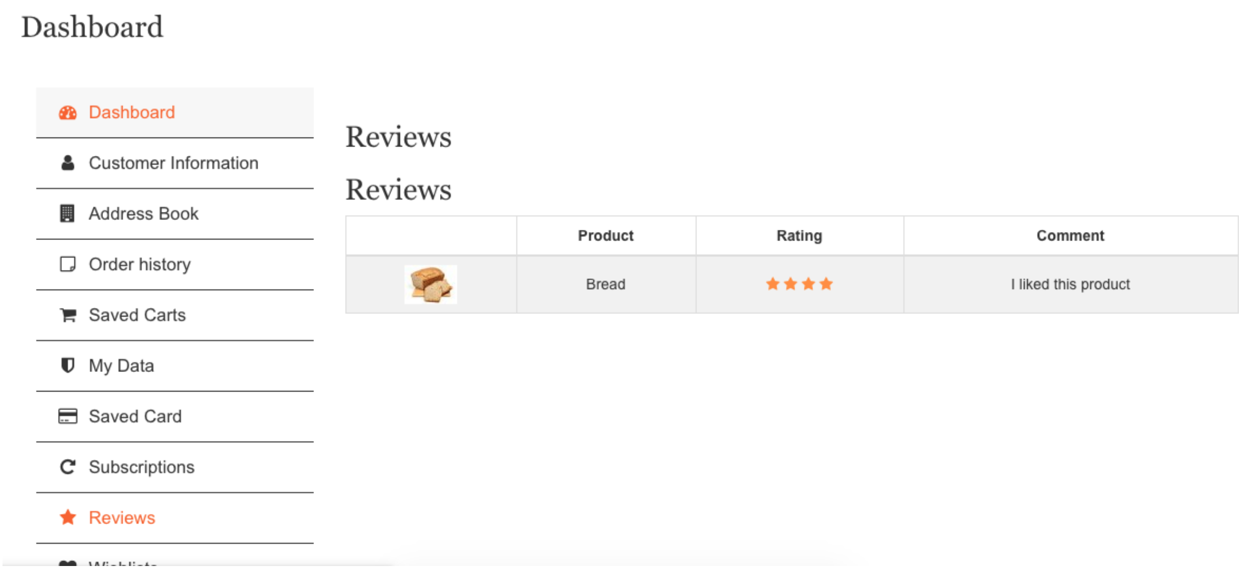
- Users can only create reviews for completed orders.
- The review should be approved by staff users.
- Theme should be configured to show product rating on product card.
- Xtheme plugin must be placed in placeholder inside the product detail view.

5.1 Creating a Review

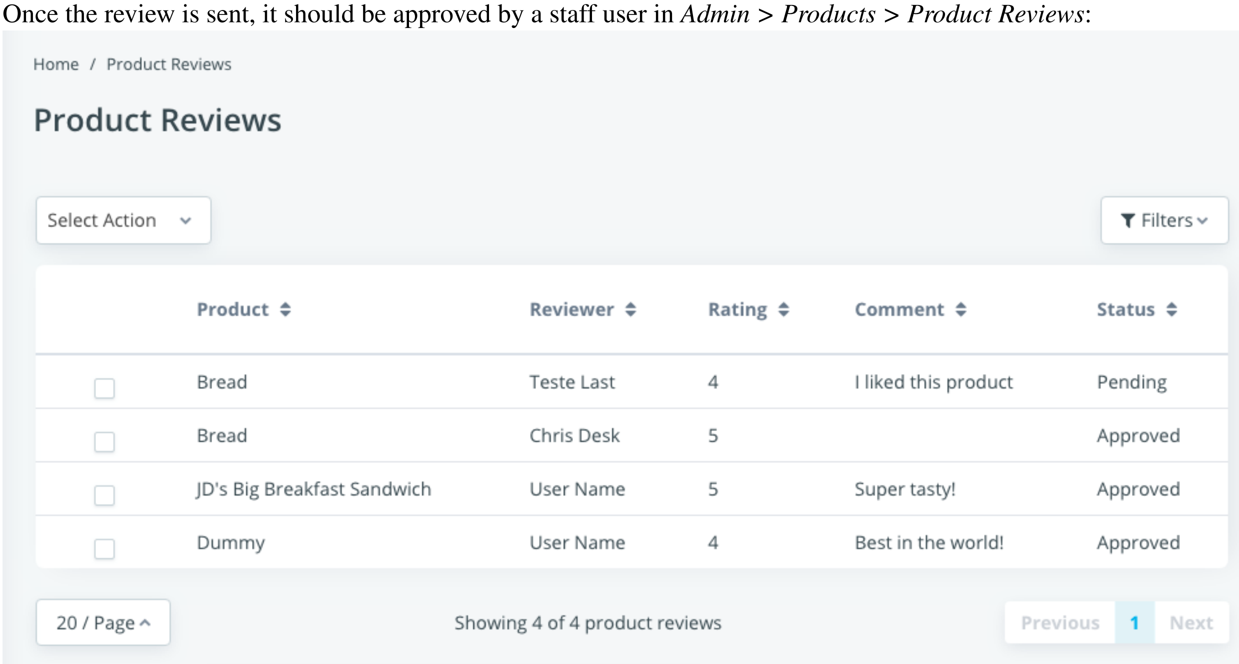
After the user has placed his order and the order is in a completed status, the user can create the reviews in customer dashboard:



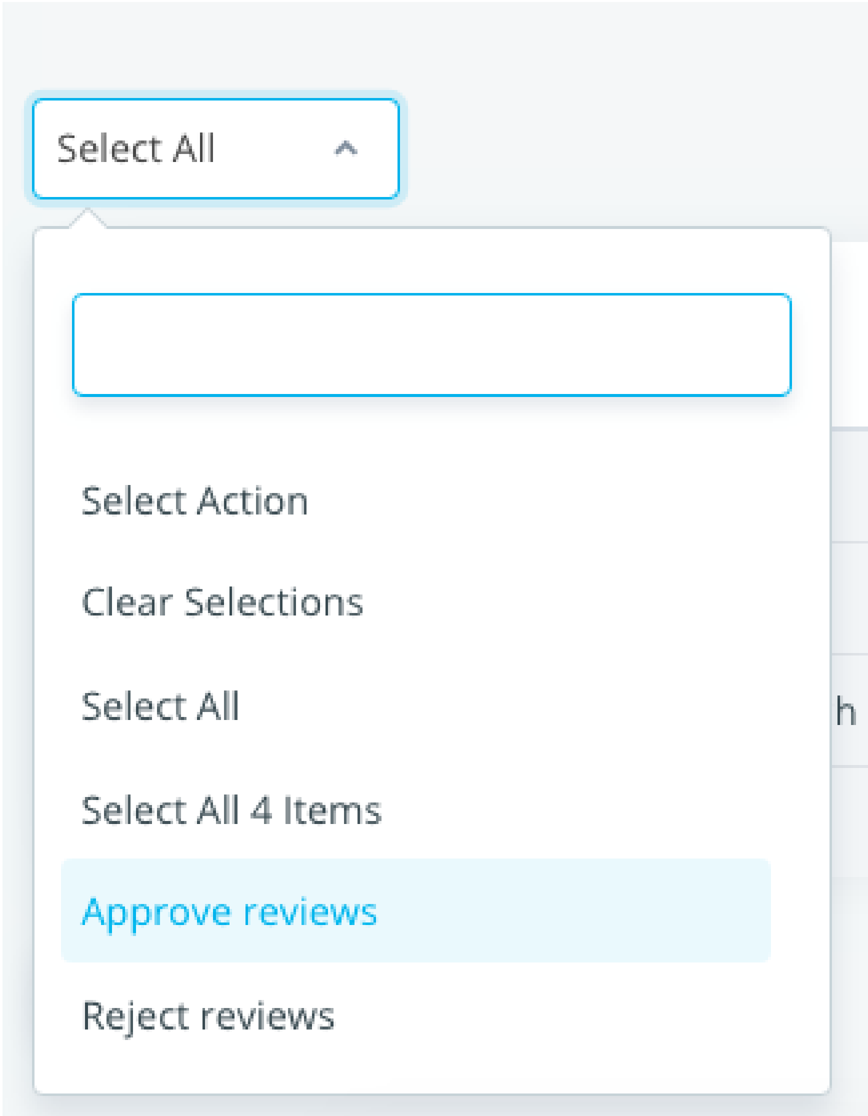
The user must select the star rating also add some comment and check whether he would recommend that product. After that the review will be available for visualization:



Once the review is sent, it should be approved by a staff user in *Admin* > *Products* > *Product Reviews*:



The staff must select all the reviews he wants to approve/disapprove and select the respective action in Mass Action dropdown:



Done. After the review is approved, it will be visible at the storefront.

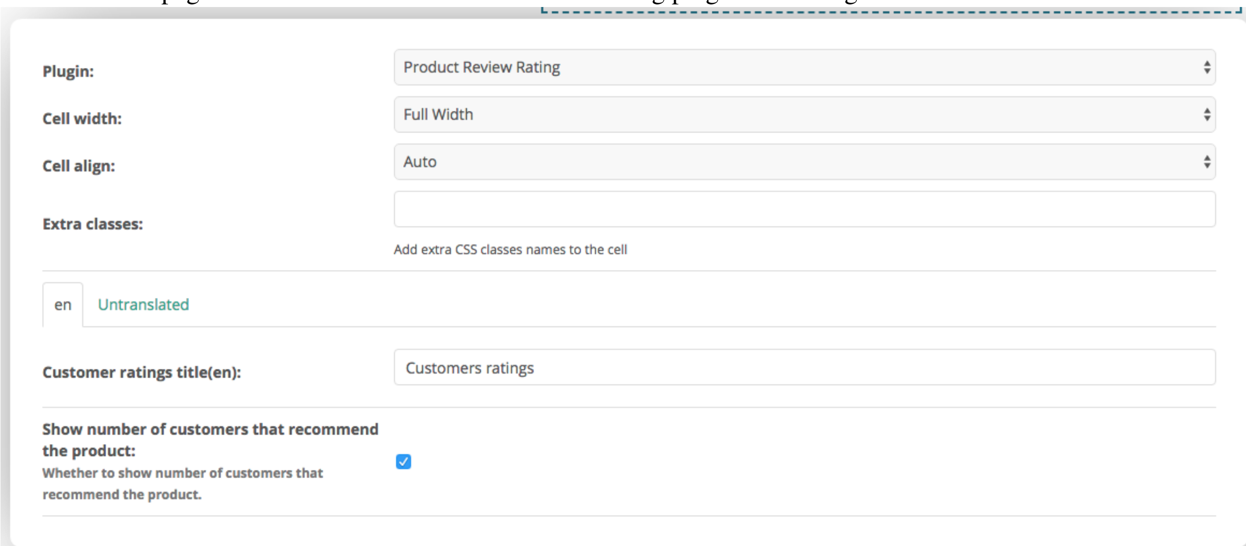
5.2 Configuring the theme

The selected theme should allow showing the product review rating in product card. Go to your theme configuration and check the options. It should provide something like this:

Check that and save.

5.3 Configuring the plugins

The module provides a plugin to render the customer ratings in places where a product is available in context, like the Product Detail page. You must add the Product Review Rating plugin and configure it as needed:



After all these configurations, the product review module will be working as it should.

CHAPTER 6

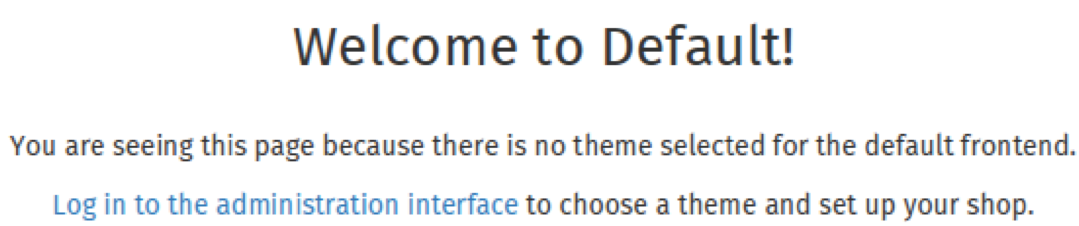
Using Themes

6.1 Installing Themes

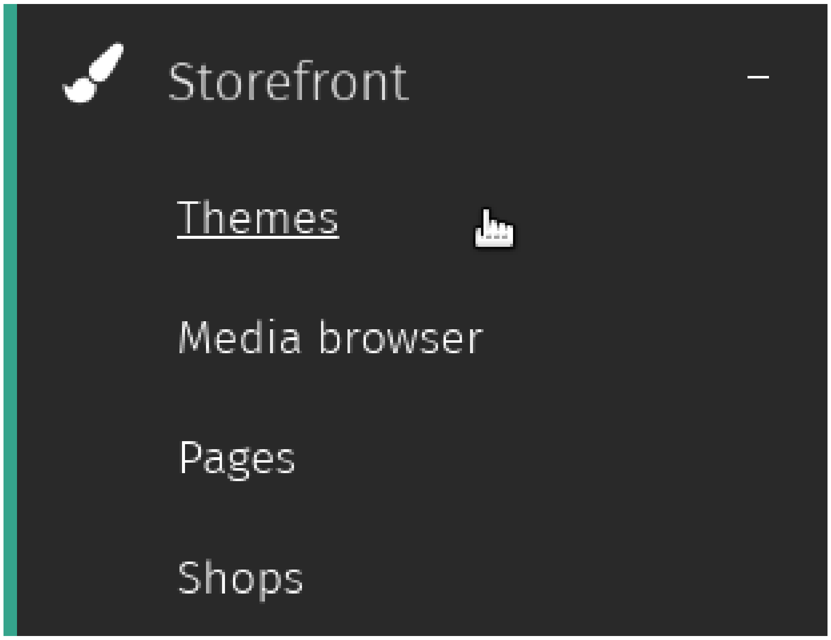
Shuup Themes (or Xthemes) are downloaded and installed like other addons.

6.2 Activating Themes

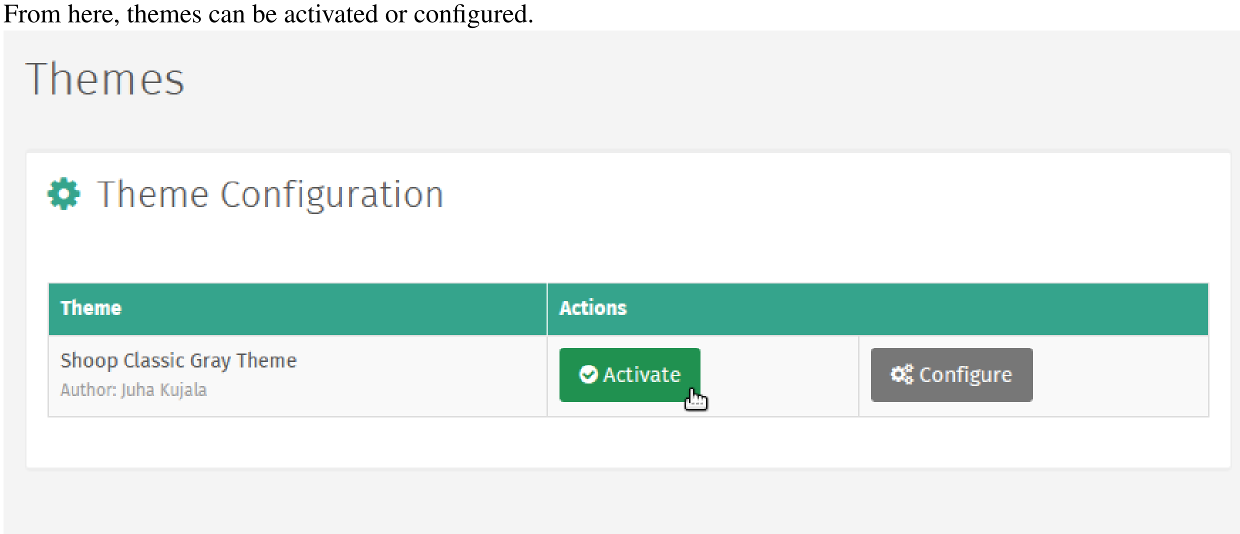
When a shop is first set up, visitors will see the following notice until a theme for the shop has been activated.



To activate a theme, go to the Shuup Admin and click *Themes* under the *Content* category from the Shuup Admin menu.



From here, themes can be activated or configured.



Clicking *Activate* will activate the theme, and by clicking *Configure*, you can configure any custom theme settings.

6.3 Editing a Page

To edit a page:

1. Log in as an administrative user.
2. Navigate to the page on the shop front you want to edit.
3. Click the *Edit Page* button in the upper right-hand corner to enter edit mode.
4. Once in edit mode, placeholders will appear as blocks surrounded by dotted outlines.

5. When finished editing, click the *Exit Edit* button to return to the normal mode.

6.4 Placeholders

Placeholders define the regions that a plugin may be included on a page. The theme source code defines where in the shop's pages placeholders will appear.

To edit placeholders, enter edit more and click the placeholder you wish to edit.

See *Editing a Page* for more information.

Note: Changes to regular placeholders only affect a single page or view.

However, if a placeholder is a *global* placeholder, any changes will be reflected site-wide. Typically, these are used in areas such as headers or footers.

Refer to your theme documentation regarding which placeholders are global placeholders.

6.5 Plugins

Shuup Xtheme plugins provide an easy way for merchants to customize their shop frontend.

Shuup comes with a selection of default plugins, or plugins may be provided by themes or addons.

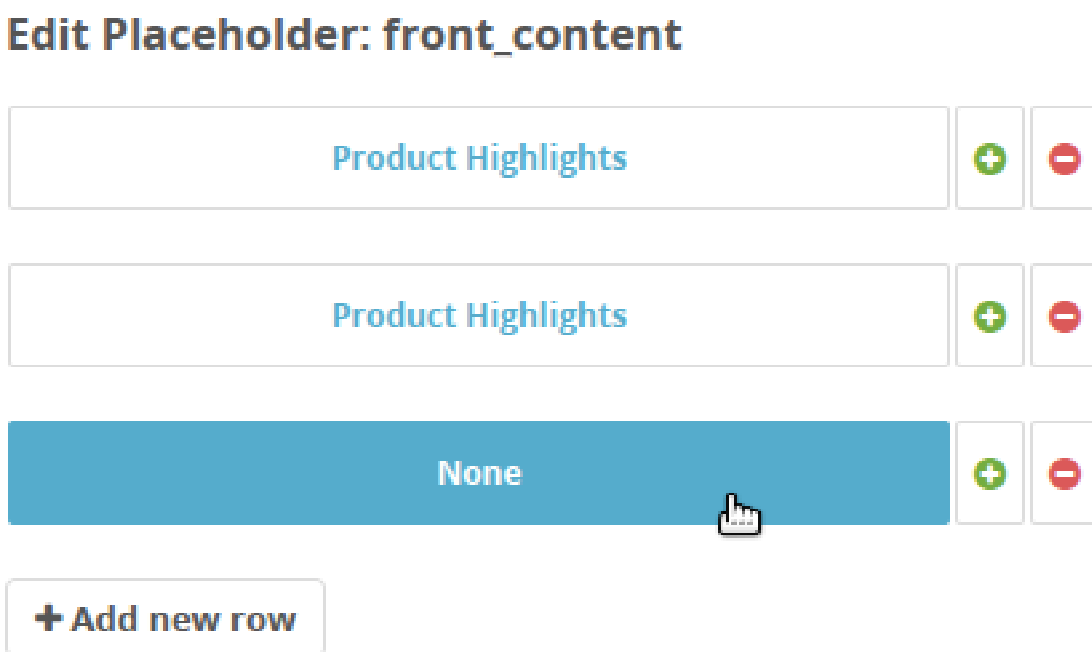
6.5.1 Adding Plugins

To add a plugin:

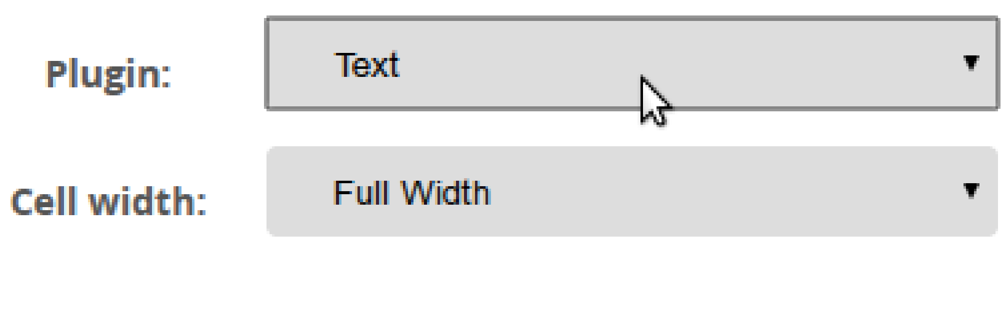
1. Enter edit mode and click the placeholder to which you want to add plugins.

2. Click *Add new row* button to add a new row of cells, or to add a column to an existing row click the new cell button add a column cell.

3. Blank plugin cells will be labelled as *None* and existing cells will be labelled with their plugin type. Select the *None* cell to configure the plugin settings.



5. Select a plugin from the *Plugin* dropdown and enter any required plugin settings.



6. Click the *Save Plugin* button at the bottom of the Xtheme edit window to save the plugin settings.

Note: While in edit mode, placeholder changes will be visible. However, they will not be visible outside edit mode until they have been published.

7. Click the *Publish Changes* button at the top of the Xtheme edit window to save the placeholder settings.

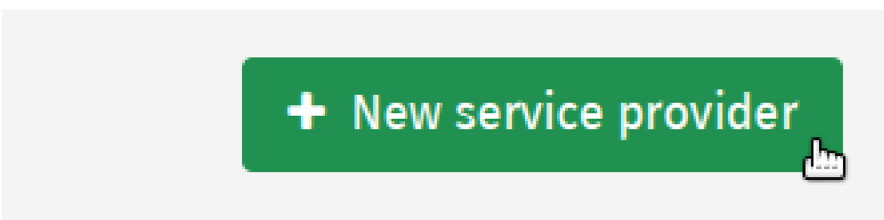
Payment and Shipping

In Shuup, payment and shippings choices are associated with particular service providers. These may be provided by Shuup's build-in carriers or payment process, or may be provided by payment or shipping-related addons.

7.1 Service Providers

7.1.1 Creating a Payment/Service Provider

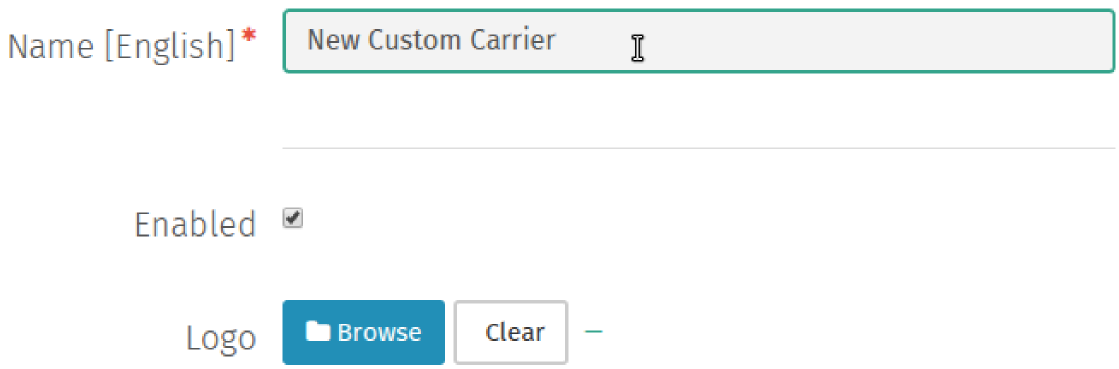
1. Navigate to the Service Providers admin page by clicking *Service Providers* under the *Shops* category from the Shuup Admin menu.
2. Click the *New service provider* button in the Service Providers admin toolbar.



3. Select the provider *type* from the dropdown.

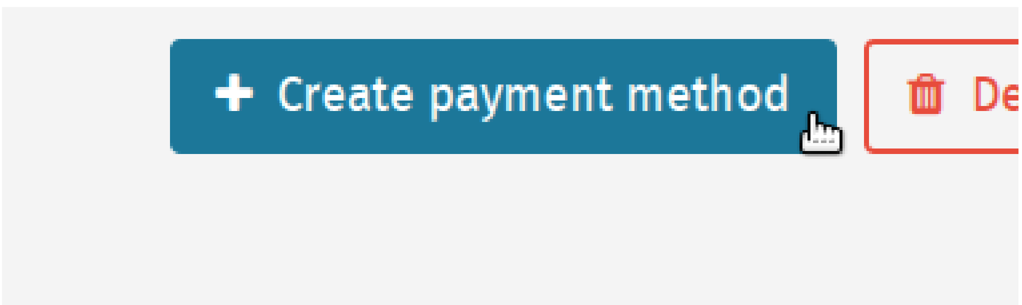
Note: Some classes of providers may require extra fields. If so, these should appear when you select the provider from the dropdown.

4. Enter the name, logo, enabled status, and any additional fields.



5. Click *Save* to create the service provider.
6. Once saved, click *Create payment method* or *Create shipping method* to create a payment or shipping method associated with this payment provider.

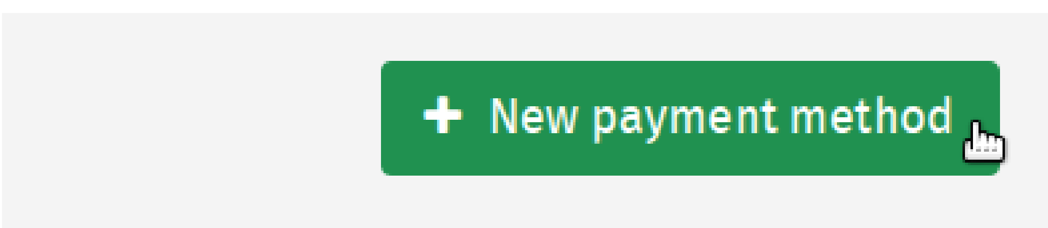
   See *Creating a Payment Method* and *Creating a Shipping Method*.

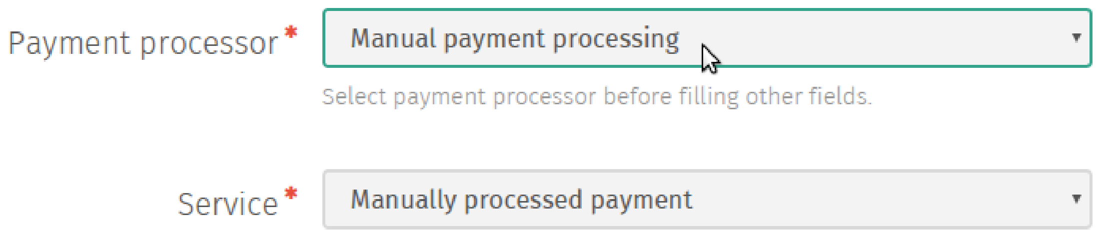
7.2 Payment Methods

7.2.1 Creating a Payment Method

1. Navigate to the Payment Method admin by clicking *Payment Methods* under the *Shops* category from the Shuup Admin menu.
2. Click the *New payment method* button in the Payment Methods admin toolbar.

3. Select a payment provider from the *payment processor* dropdown as well as a payment service from the *service* dropdown.

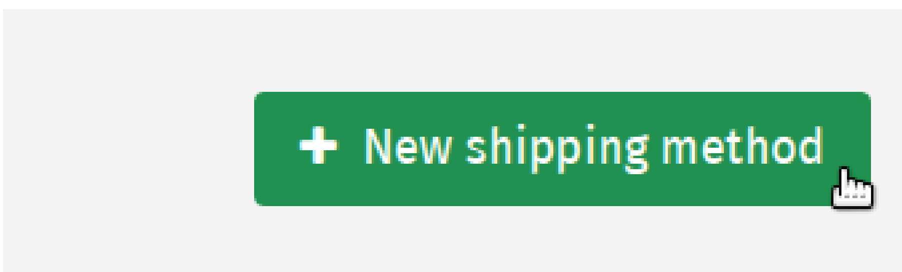


4. Enter the remaining information for the method.
5. Click *Save* to create the payment method.

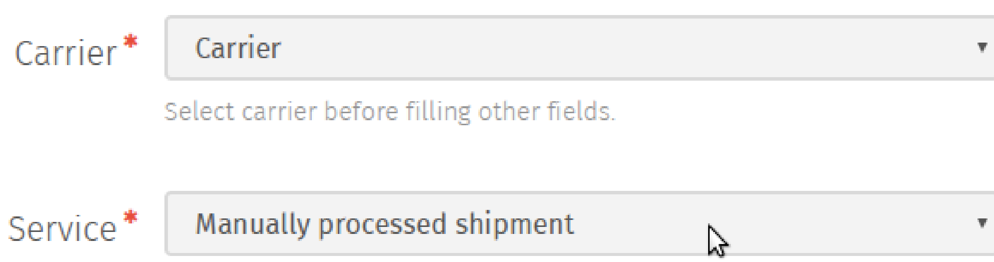
7.3 Shipping Methods

7.3.1 Creating a Shipping Method

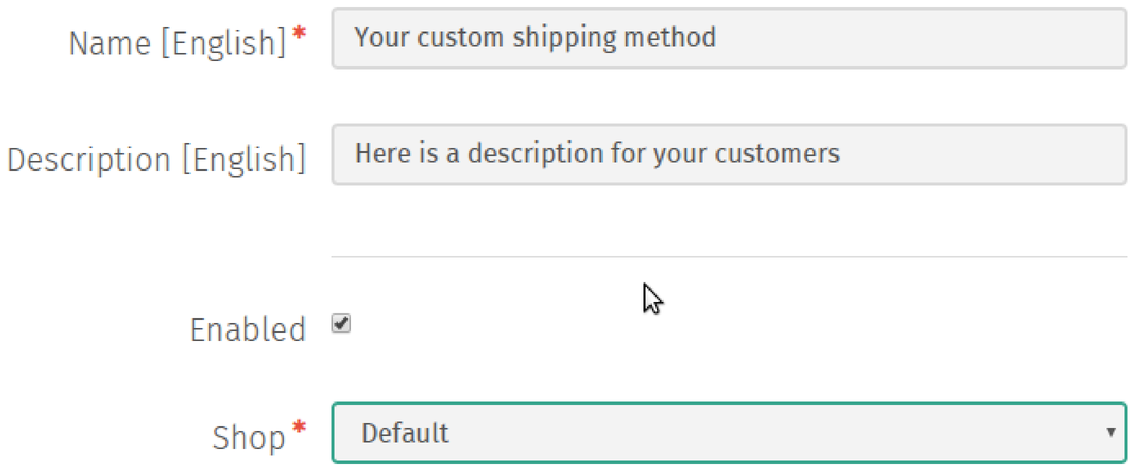
1. Navigate to the Shipping Method admin by clicking *Shipping Methods* under the *Shops* category from the Shuup Admin menu.
2. Click the *New shipping method* button in the Shipping Methods admin toolbar.



3. Select a shipping provider from the *carrier* dropdown as well as a shipping service from the *service* dropdown



4. Enter the remaining information for the method.



5. Click *Save* to create the shipping method.

7.4 Behavior Components

When a customer checks out, they are presented the choice of any available payment methods for their order.

Whether a particular payment method is applicable to an order depends on its behavior, which is comprised of any number of *behavior components*.

Behavior components are essentially just individual components that, when taken together, define.

1. Whether a payment method is available for an order
2. The amount to charge for that payment method, if available

Shuup also ships with the following basic components (although behavior components can also be added by *Addons*):

Fixed cost Add a fixed cost.

Waiving cost Add a cost that is only applied up to a price limit.

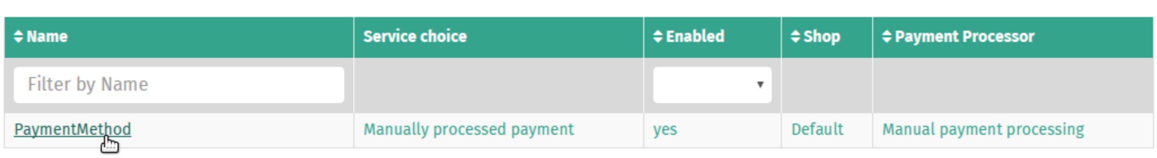
Weight limits Limit availability of the service based on total weight of products.

Weight-based pricing range Add a cost to the order if it is within a specific weight range.

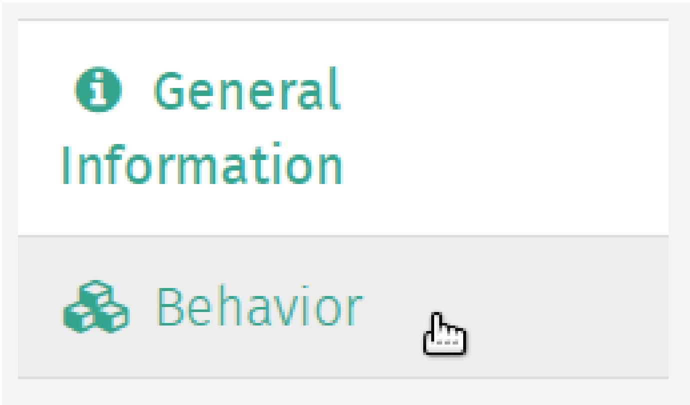
Note: If there are multiple valid weight-based pricing ranges for an order, the cheapest-option will be selected.

7.4.1 Adding a Behavior Component to a Method

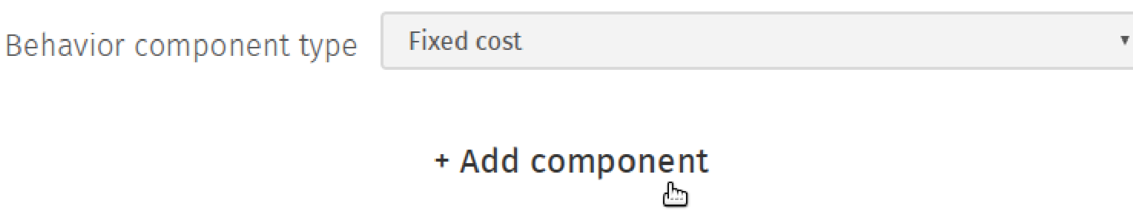
1. Navigate to the Shipping or Payment Methods admin by clicking *Shipping Methods* or *Payment Methods* under the *Shops* category from the Shuup Admin menu.
2. Select the shipping or payment method to which you want to add behavior components.



3. Click the *Behavior* tab on the left-hand side of the screen.



4. Select behavior component type from the *Behavior component type* dropdown and press the *Add component* button to add a blank form for the selected behavior component.



5. Enter the behavior component settings, repeat as necessary to add more behavior components.

6. Click *Save* to save the behavior components for the selected method.

CHAPTER 8

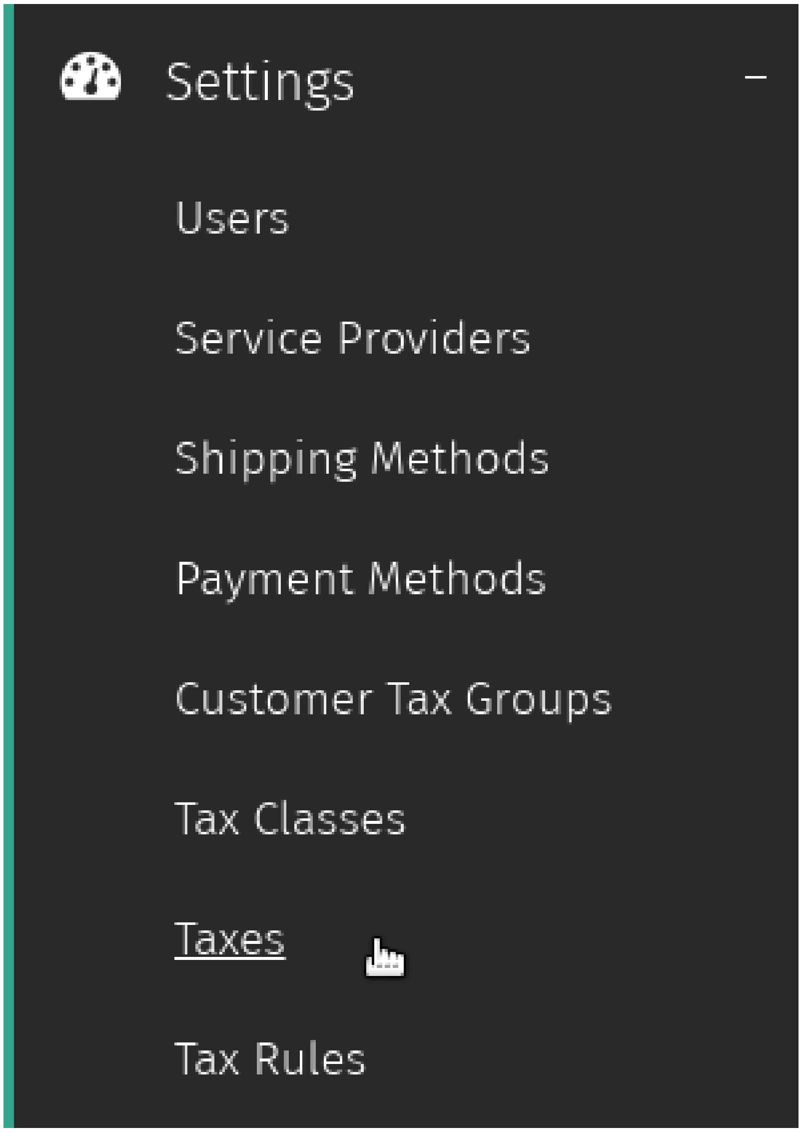
Tax Settings

8.1 Taxes

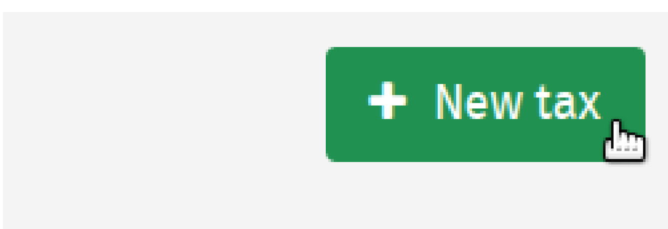
8.1.1 Creating a New Tax

To create a new tax:

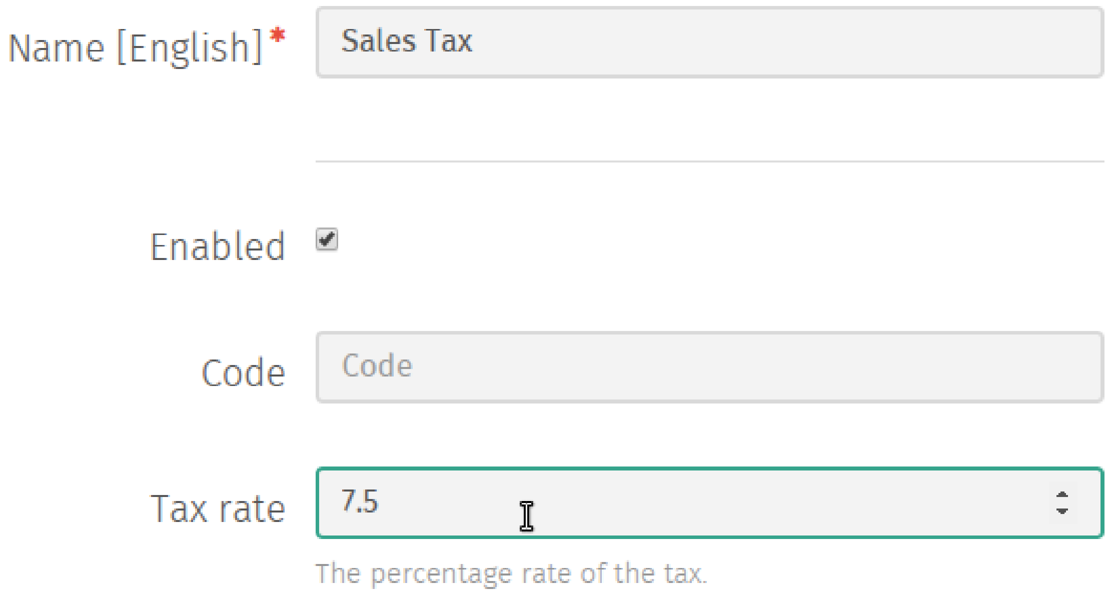
1. Navigate to the Taxes admin page by clicking *Taxes* under the *Settings* category from the Shuup Admin menu.



2. Click the *New tax* button in the Taxes admin toolbar.



3. Enter values for new tax, including a tax rate as a percentage (i.e., for a tax rate of 7.5%, enter *7.5* as the tax rate value).

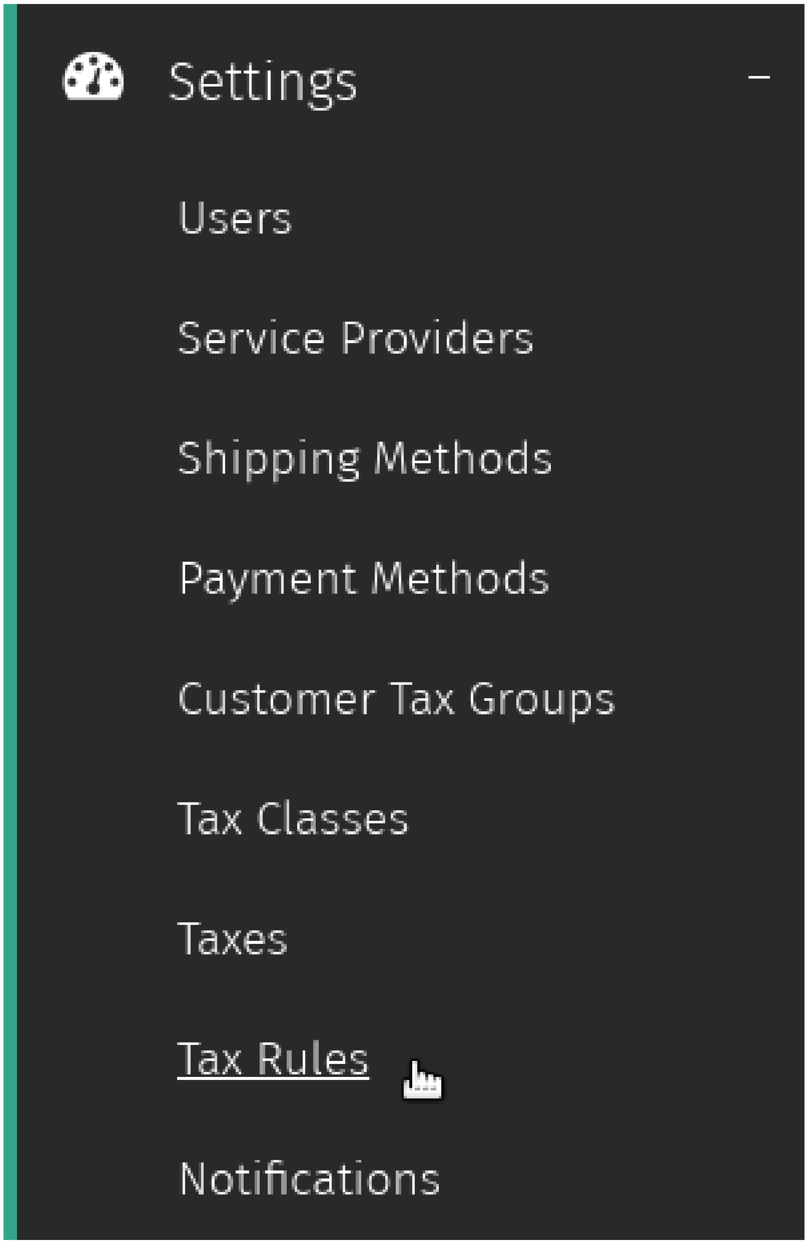


4. Click *Save* to save the new tax.

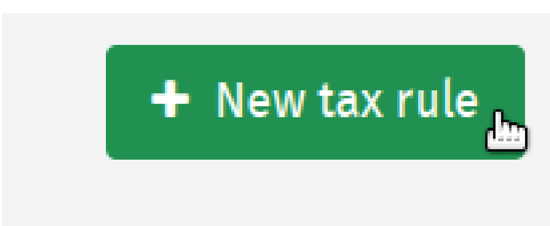
8.2 Tax Rules

8.2.1 Creating a New Tax Rule

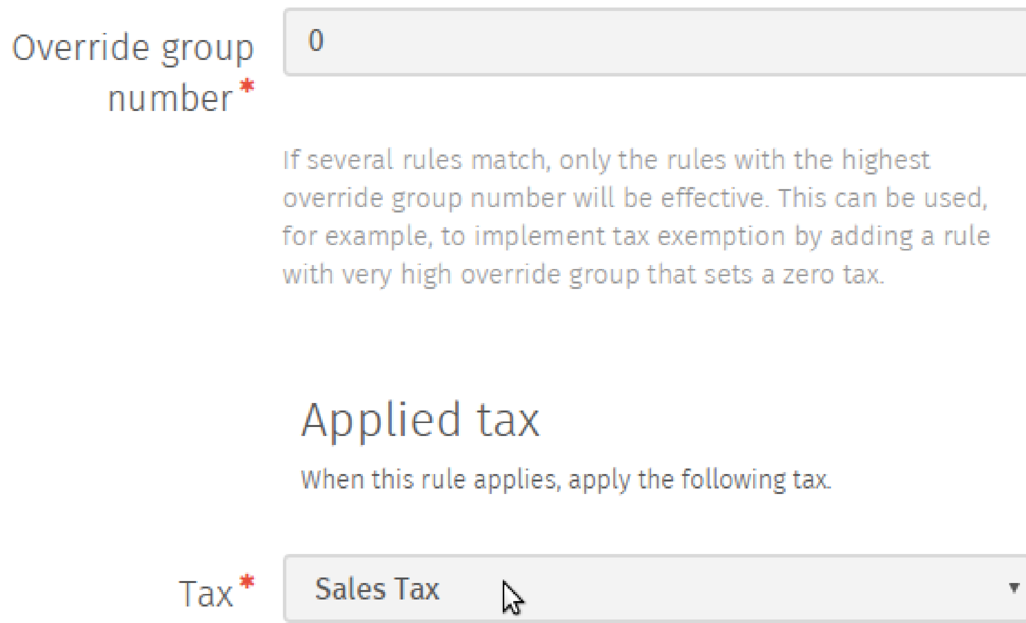
1. Navigate to the Taxes admin page by clicking *Tax Rules* under the *Settings* category from the Shuup Admin menu.



2. Click the *New tax rule* button in the Tax Rules admin toolbar.



3. Enter the criteria for the new tax rule.

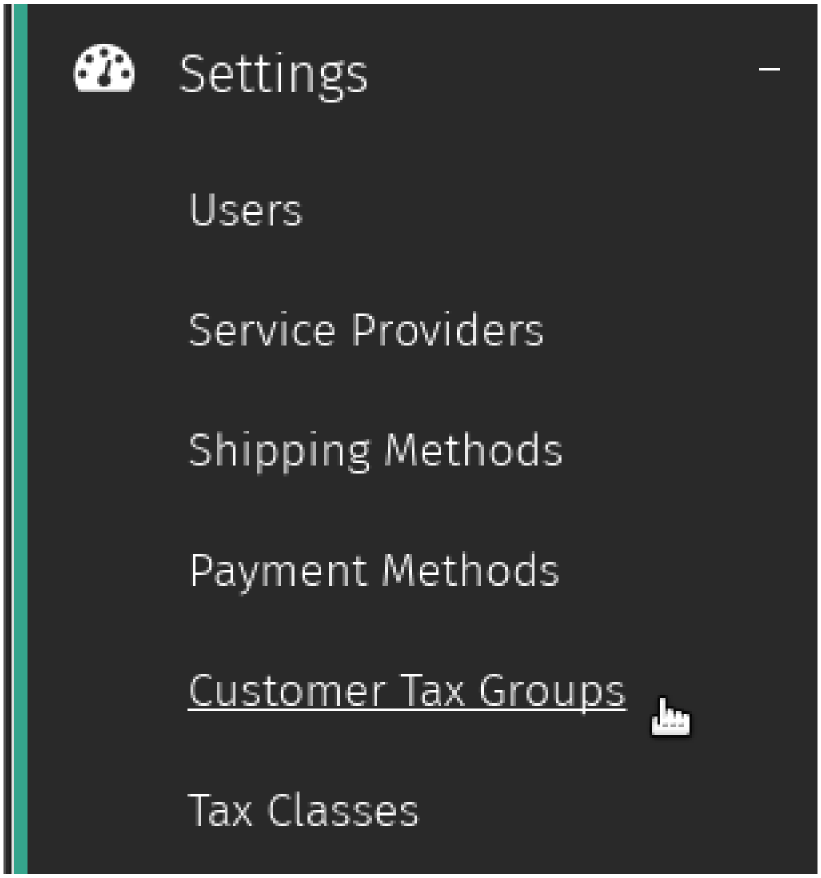


4. Click *Save* to save the new tax rule.

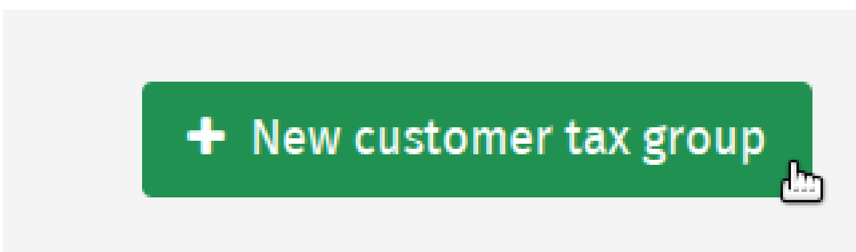
8.3 Customer Tax Groups

8.3.1 Creating a New Customer Tax Group

1. Navigate to the Taxes admin page by clicking *Customer Tax Groups* under the *Settings* category from the Shuup Admin menu.



2. Click the *New customer tax group* button in the Tax Groups admin toolbar.



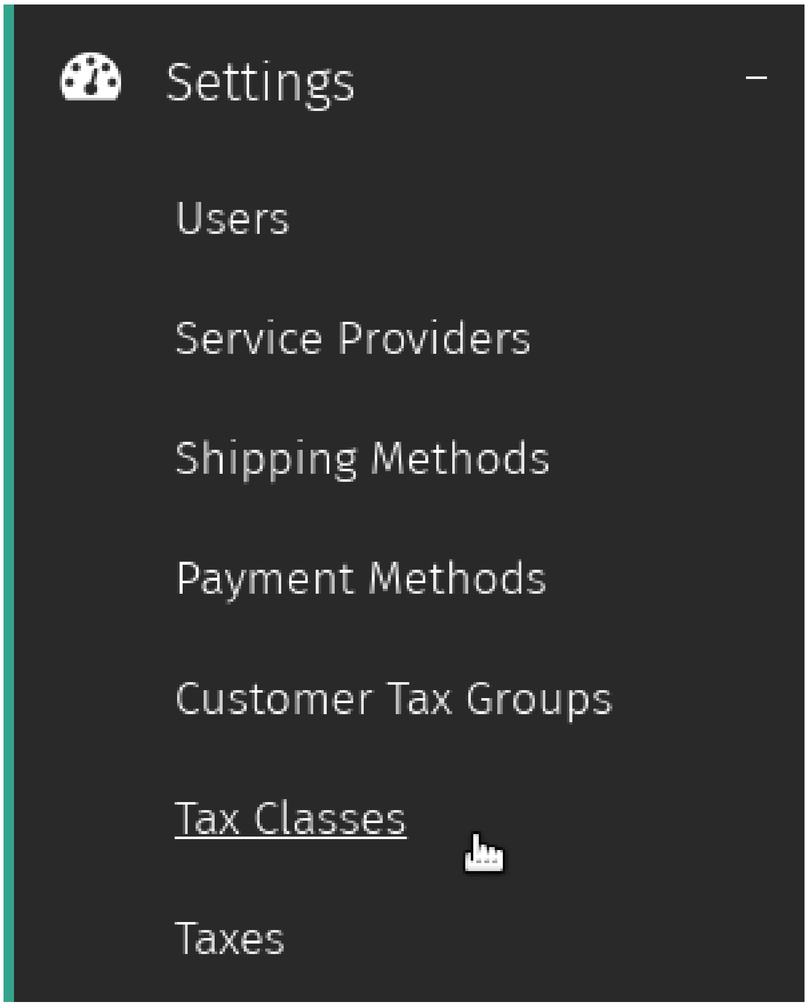
3. Enter a name for the new tax group.

4. Click *Save* to save the new customer tax group.

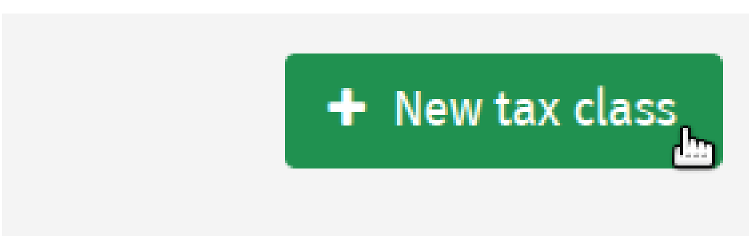
8.4 Tax Classes

8.4.1 Creating a New Tax Class

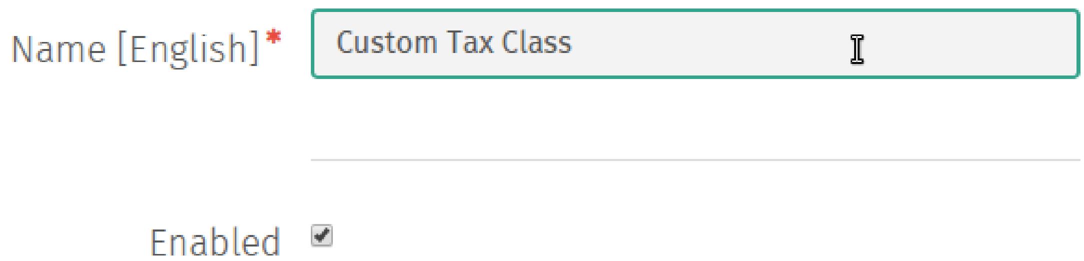
1. Navigate to the Tax Classes admin page by clicking *Tax Classes* under the *Settings* category from the Shuup Admin menu.



2. Click the *New tax class* button in the Tax Classes admin toolbar.



3. Enter information for the new tax class.



4. Click *Save* to save the new customer tax class.

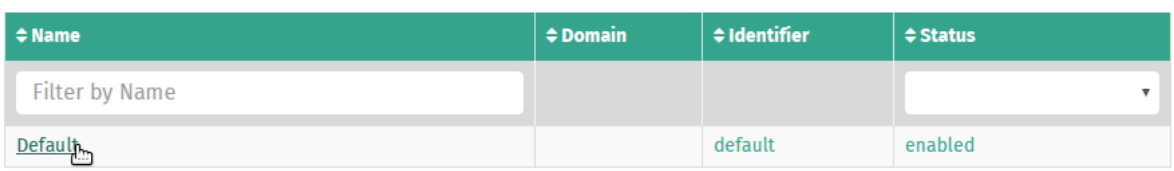
8.5 Display Settings

8.5.1 Shop Settings

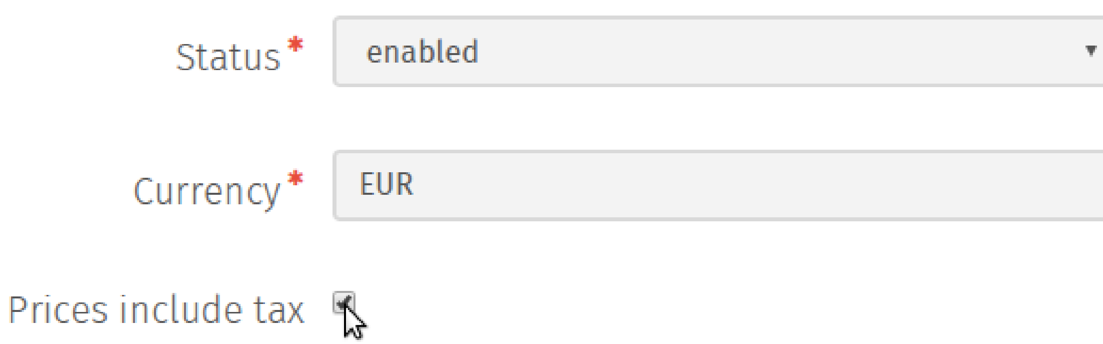
Note: Tax display settings can only be configured for a shop if there are no orders in the system.

Once an order has been placed, you will no longer be able to change the tax display settings.

1. Navigate to the Shops admin page by clicking *Shops* under the *Shops* category from the Shuup Admin menu.
2. Select the shop whose tax display settings you would like to modify.



3. Check or uncheck the *Prices include tax* field to enable or disable tax display for shop.



4. Click *Save* to save the shop settings.

CHAPTER 9

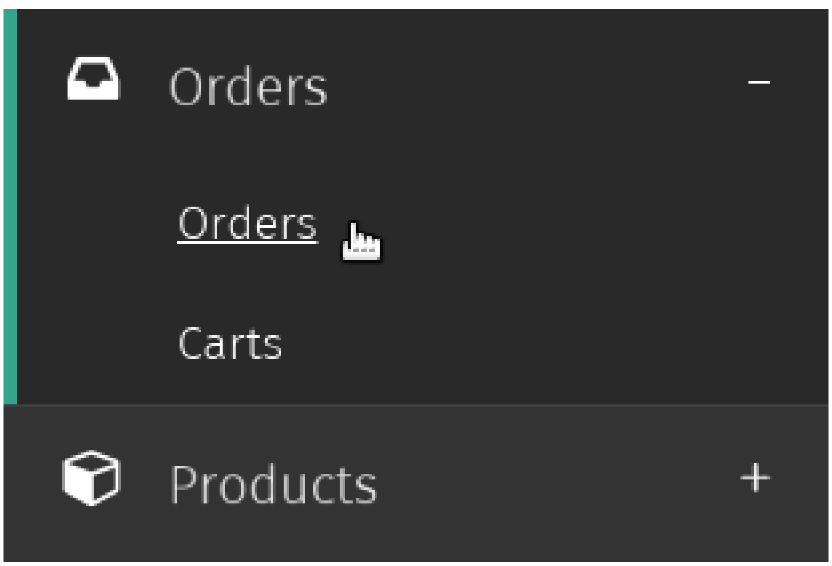
Orders

9.1 Creating an Order

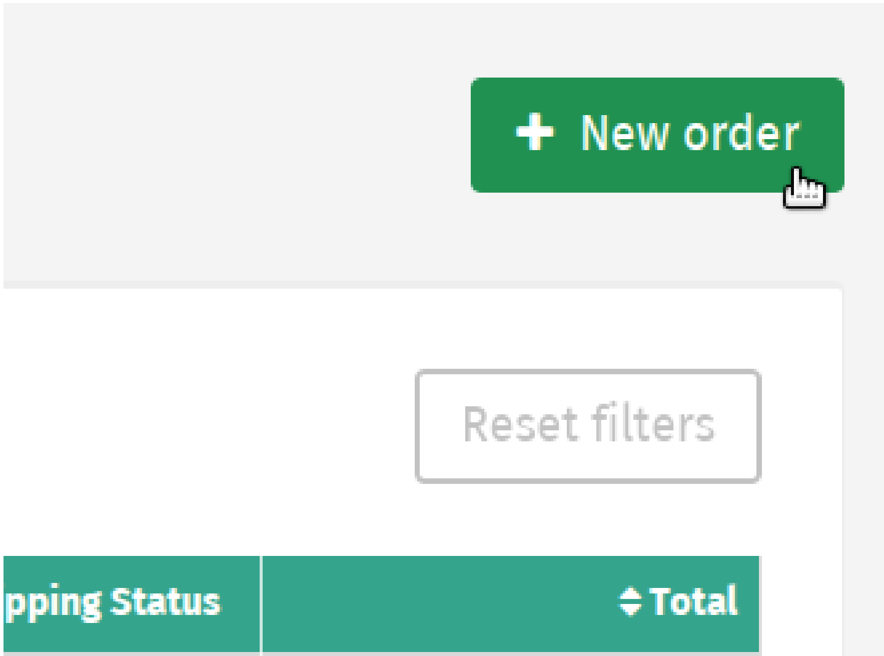
Orders can be made in one of two ways: by a customer through the shop front or by a merchant through the Shuup Admin.

To create an order through the Shuup Admin:

1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



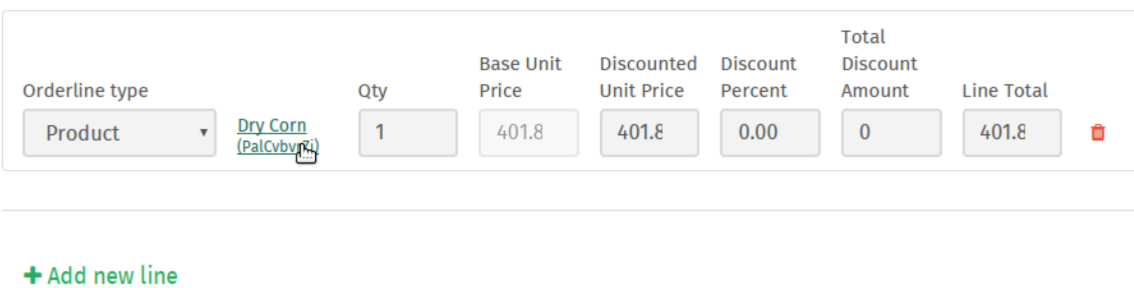
2. Click the *New order* button on the Order admin toolbar.



3. Under the *Customer details* section, search the customer by name or email to select an existing customer, click the search icon to launch the customer selection popup or leave the field blank to create a new customer along with the order. If a customer is selected, click the bin icon to delete it.
4. Under the *Order contents* section, click *Add new line* to add blank order lines to the order.

   These can either be of type *product*, *other*, or *text/comment*.

   If adding a product, clicking *Select product* will launch the product browser window.



   Here are the types of lines you can create in an order:

   Product line A product, quantity, and any pricing or discount information

   Other line A miscellaneous priced line

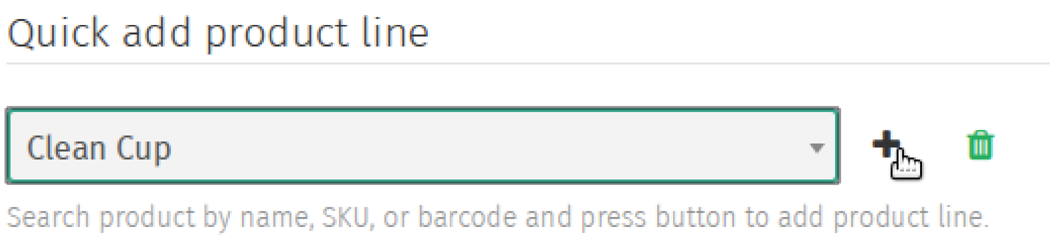
   Text/Comment line A non-priced text line

5. Optionally, the *Quick add product line* form can be used to quickly add product lines to the order. For example, this can be used when adding products using a barcode scanning device.

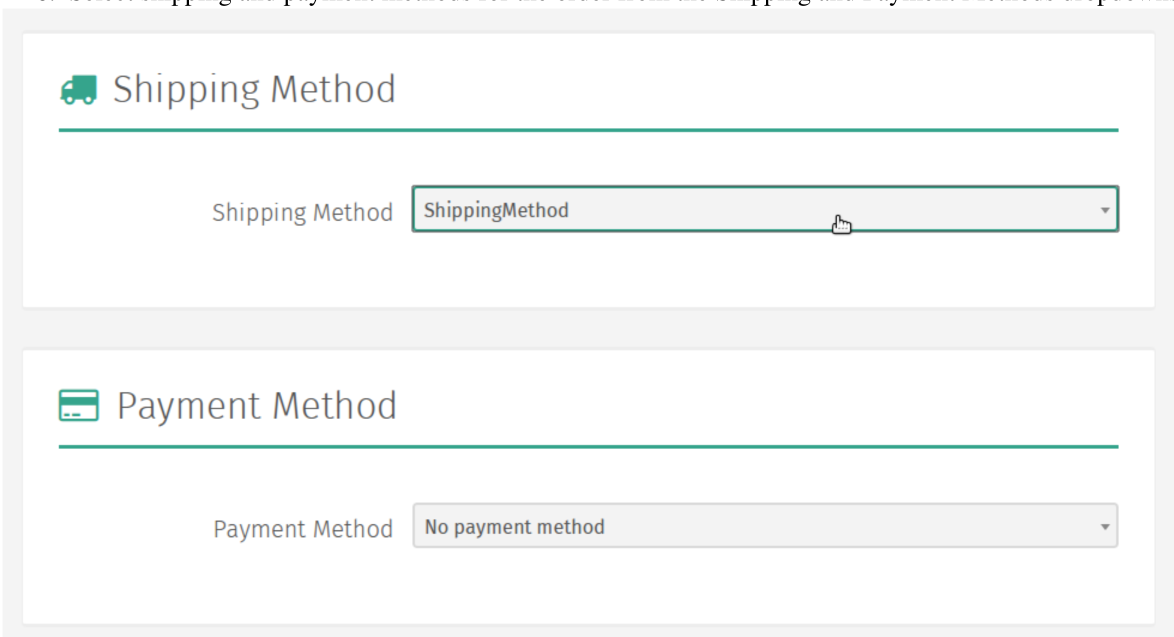
   To quick add products:

   (a) Enter a product name, sku, or barcode number and select desired product from the dropdown results.

   (b) Press the plus button to add the product line to order or press the trash button to clear the input and select a new product.



6. Select shipping and payment methods for the order from the Shipping and Payment Methods dropdowns.



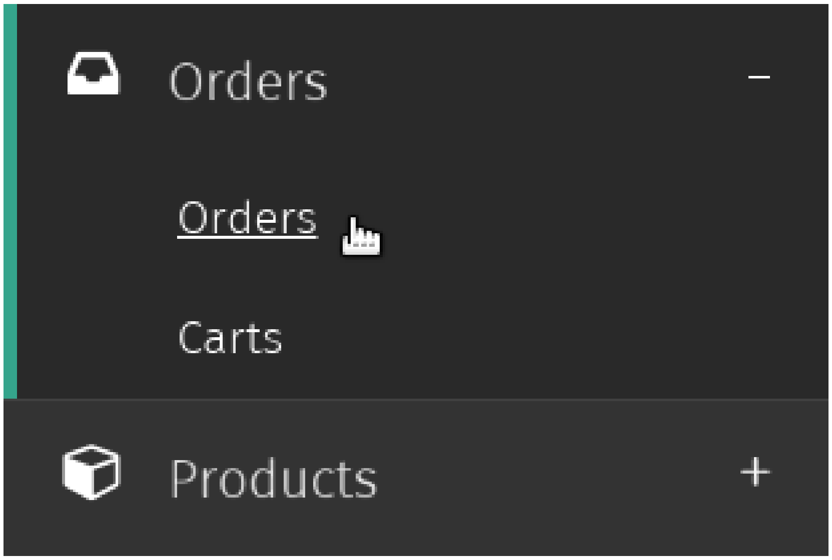
7. Click the *Proceed* button to create the order.

Note: You must select shipping and payment methods for each order.

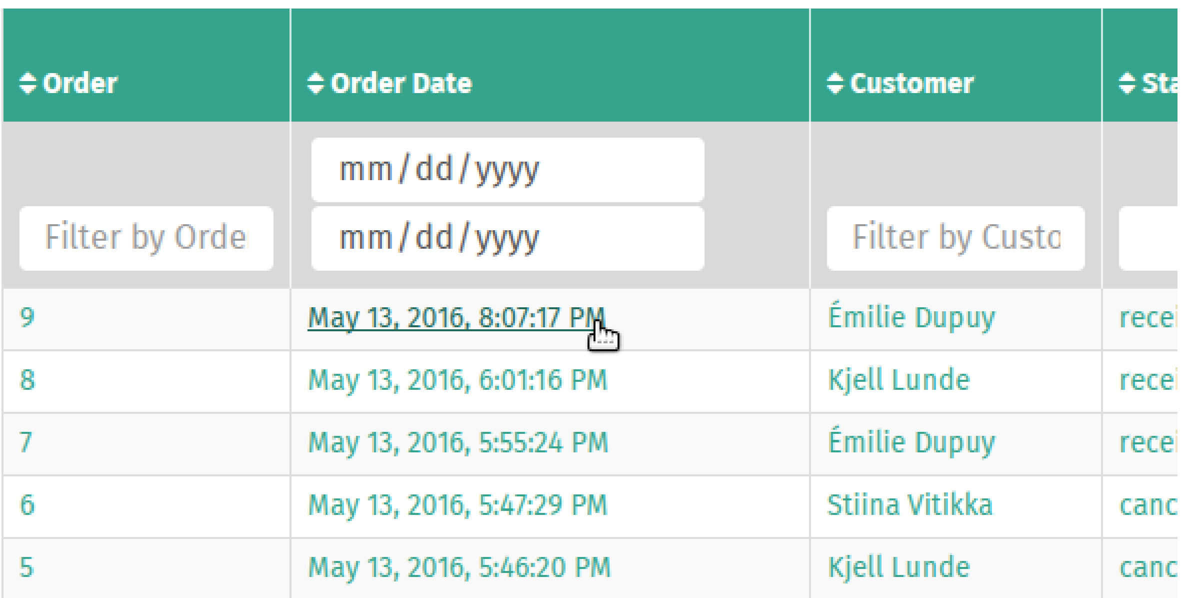
Note: Method rules, taxes and possible extra discounts are calculated after proceeding.

9.2 Editing an Order

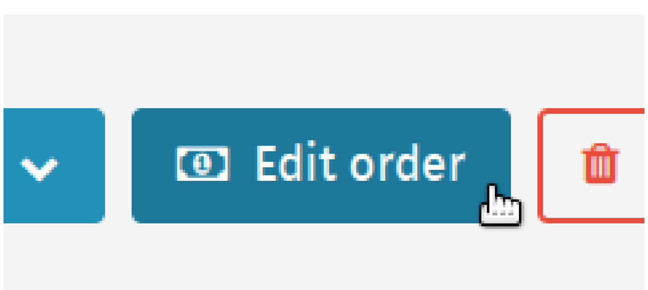
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



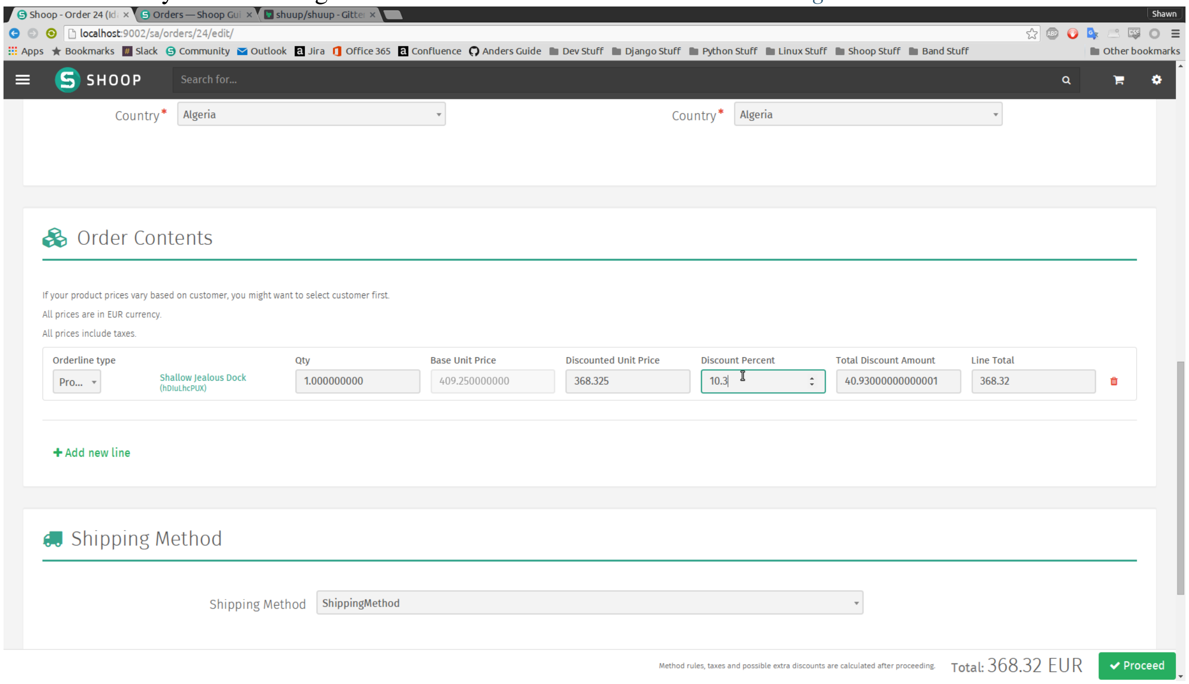
2. Select the order that you wish to edit.



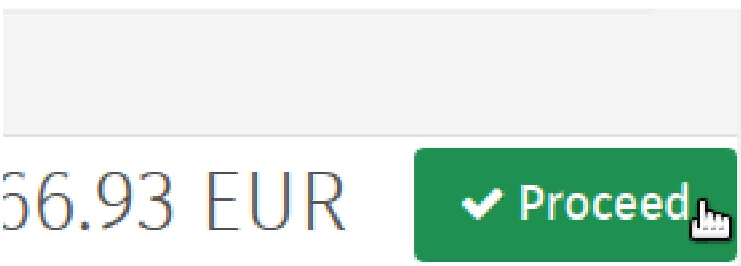
3. Click *Edit Order* in the order toolbar.



4. Make any desired changes to the order contents as done when *Creating an Order*.



6. Click the *Proceed* button to save the order contents.

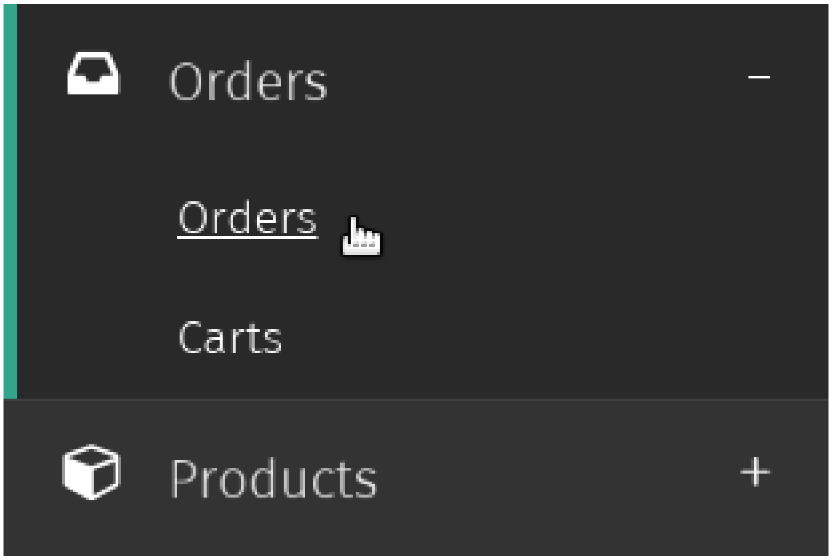


9.3 Order Shipments

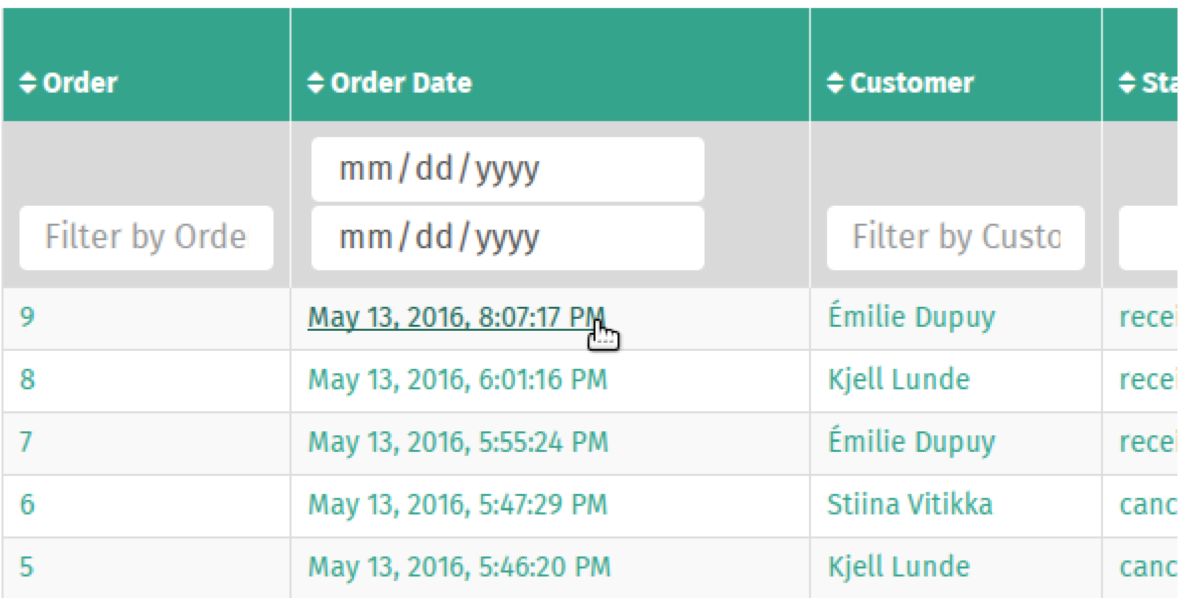
9.3.1 Creating an Order Shipment

To create an order shipment:

1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.

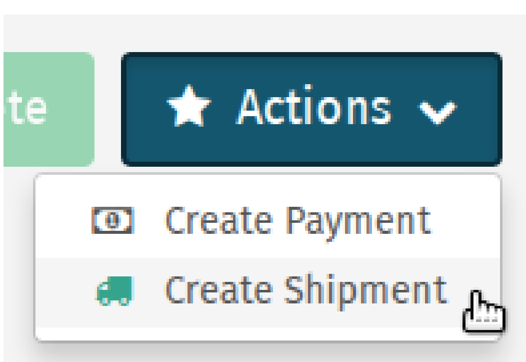


2. Select the order for which you want to create a shipment.



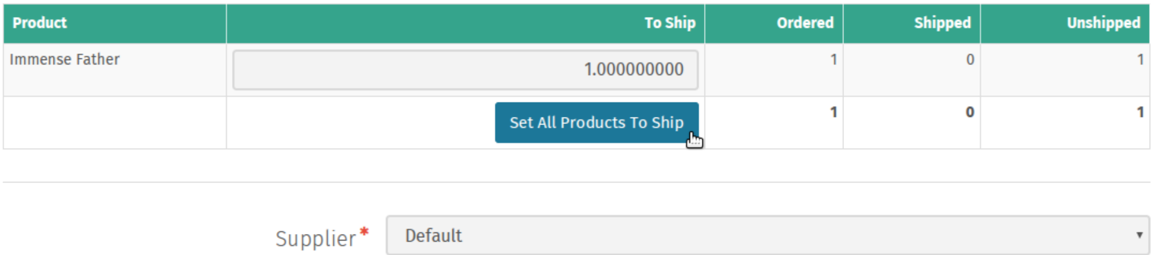
Order	Order Date	Customer	Sta
Filter by Orde	mm / dd / yyyy mm / dd / yyyy	Filter by Custo	
9	May 13, 2016, 8:07:17 PM	Émilie Dupuy	recei
8	May 13, 2016, 6:01:16 PM	Kjell Lunde	recei
7	May 13, 2016, 5:55:24 PM	Émilie Dupuy	recei
6	May 13, 2016, 5:47:29 PM	Stiina Vitikka	canc
5	May 13, 2016, 5:46:20 PM	Kjell Lunde	canc

3. Click *Create Shipment* in the order toolbar.

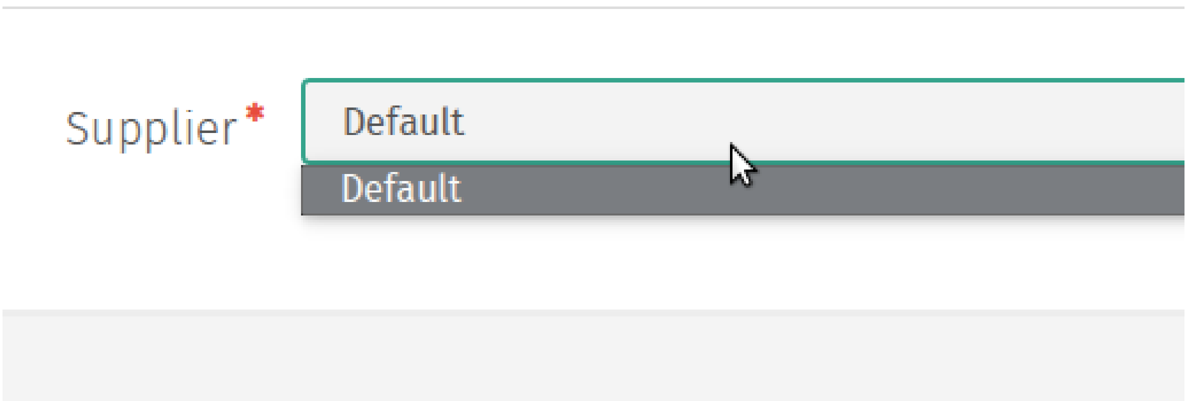


4. For each product, select the quantity of that product to include in the shipment. To easily select all remaining

unshipped quantities, click *Set All Products To Ship*.



5. Select a product supplier from the dropdown menu.

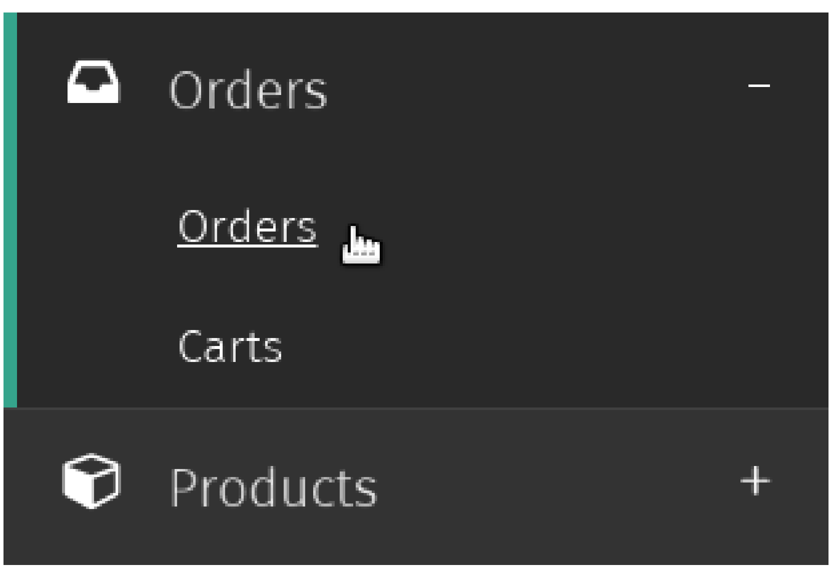


6. Click the *Create Shipment* button to create the shipment.

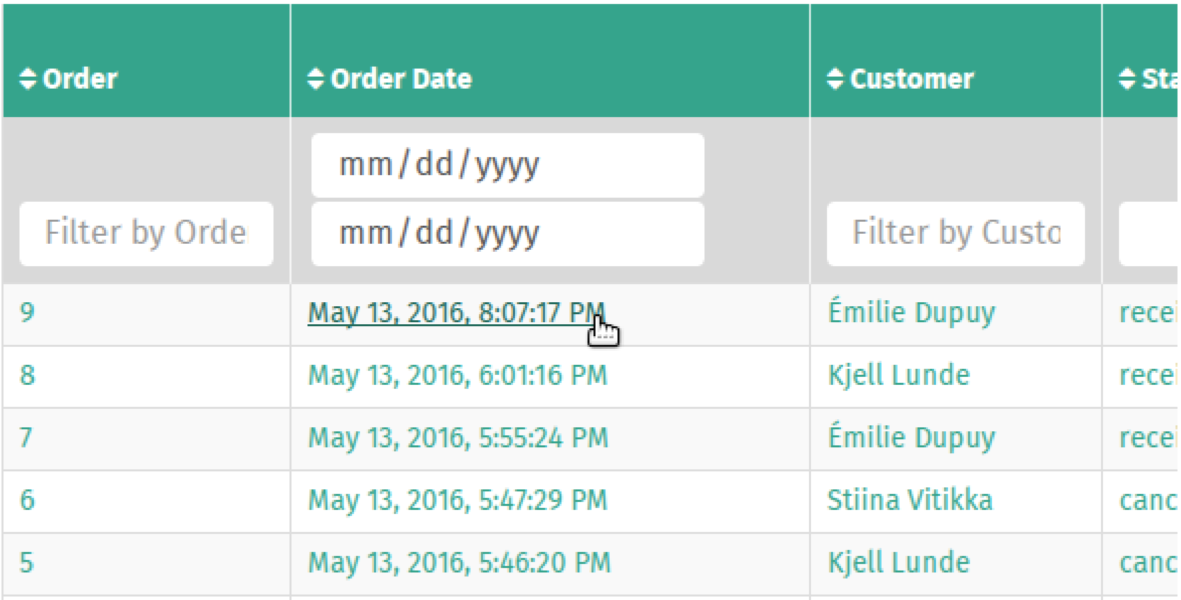
9.3.2 Printing a Delivery Slip

To print a delivery slip for an order shipment:

1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order which delivery slip you want to print.



3. If you haven't already done so, create an order shipment.

   See *Creating an Order Shipment*.

4. Click *Printouts* tab on the left-hand side of the screen

5. Click *Get Delivery Slip HTML* for the order shipment you would like to print (there will be one available for each shipment).

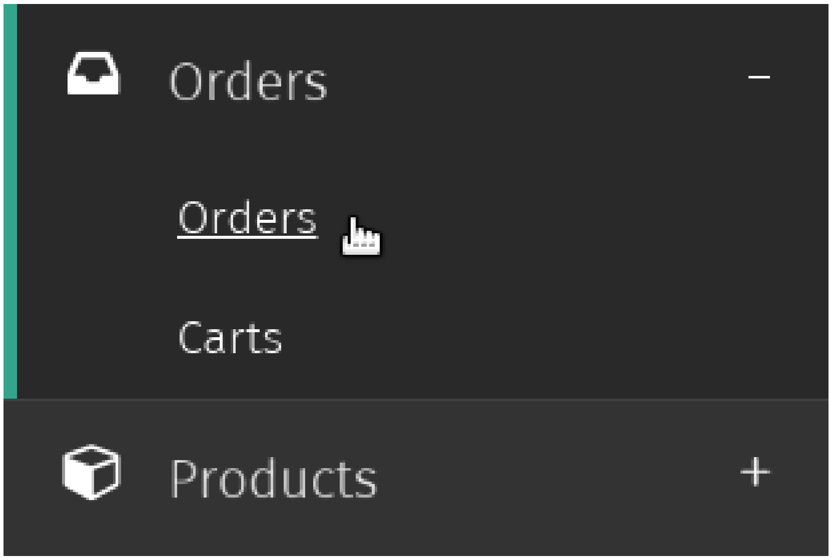
6. You will now be taken to the delivery slip, which you can either print or save to your computer from your browser menu.

9.4 Order Payments

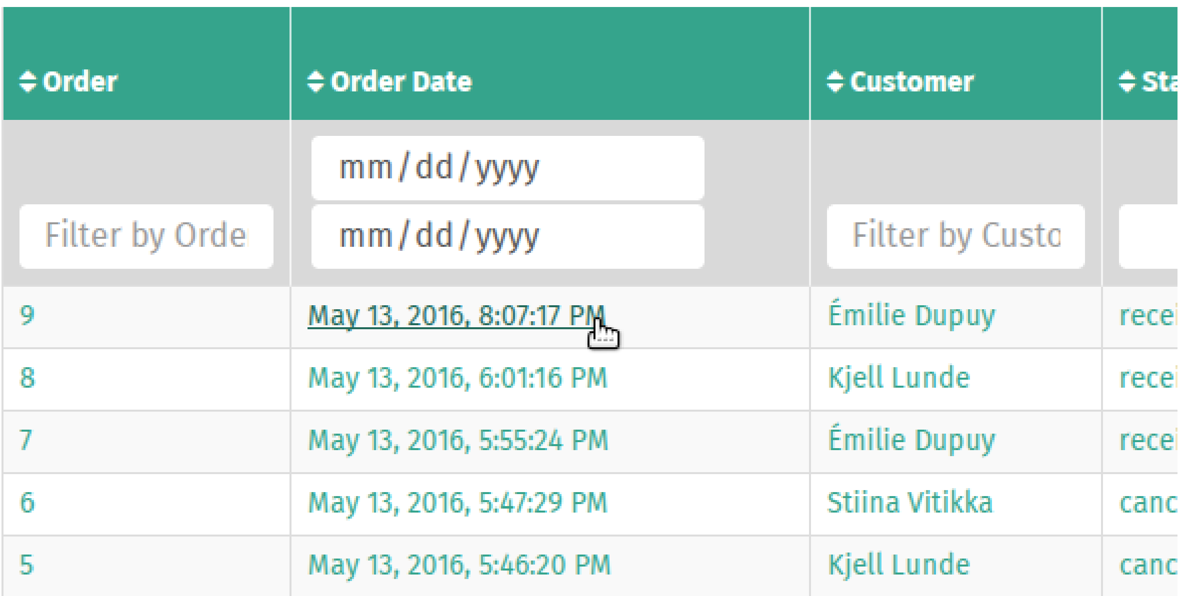
9.4.1 Creating an Order Payment

To create an order payment:

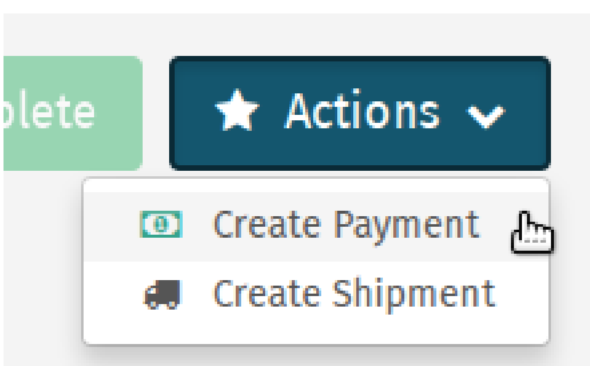
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order for which you want to create a payment.

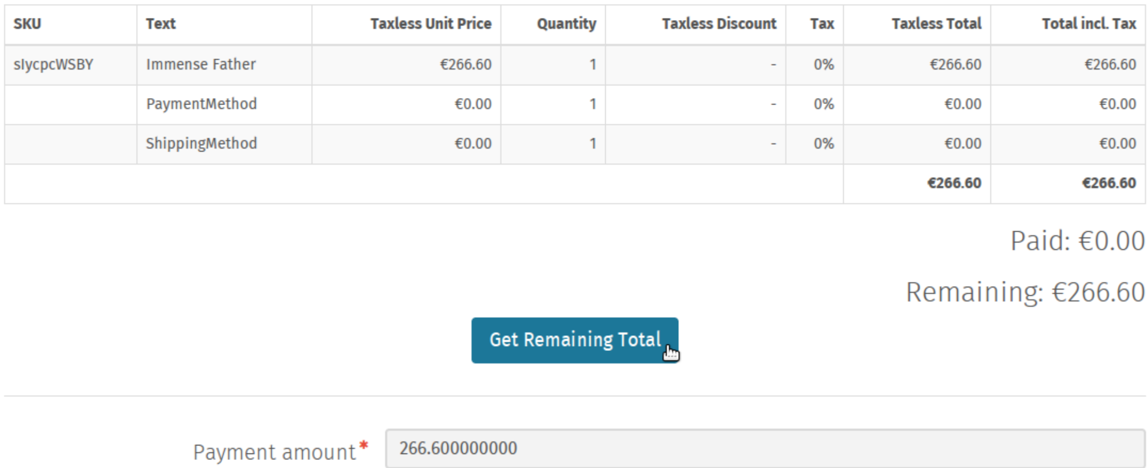


3. Click *Create Payment* in the order toolbar.



4. Enter the amount of the payment in the *Payment amount* field or click *Get Remaining Total* to automatically fill

will remaining unpaid total.

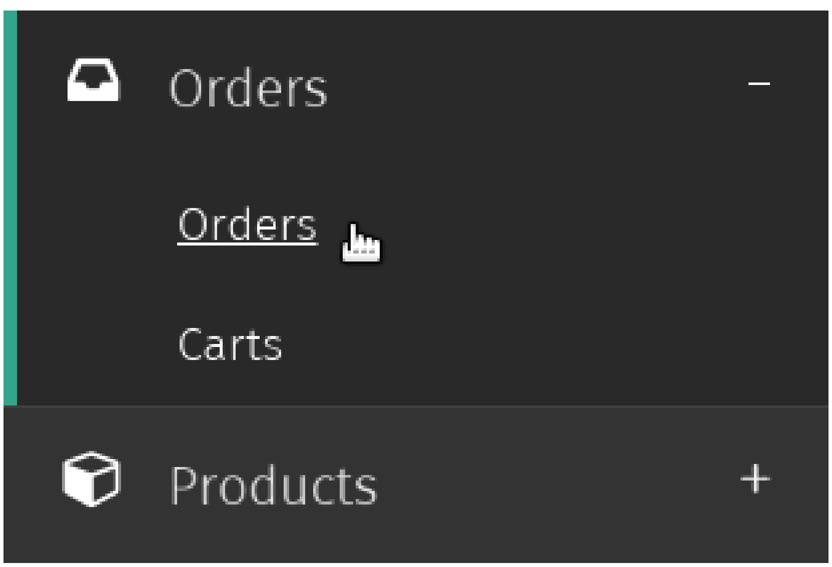


6. Click the *Create Payment* button to create the payment.

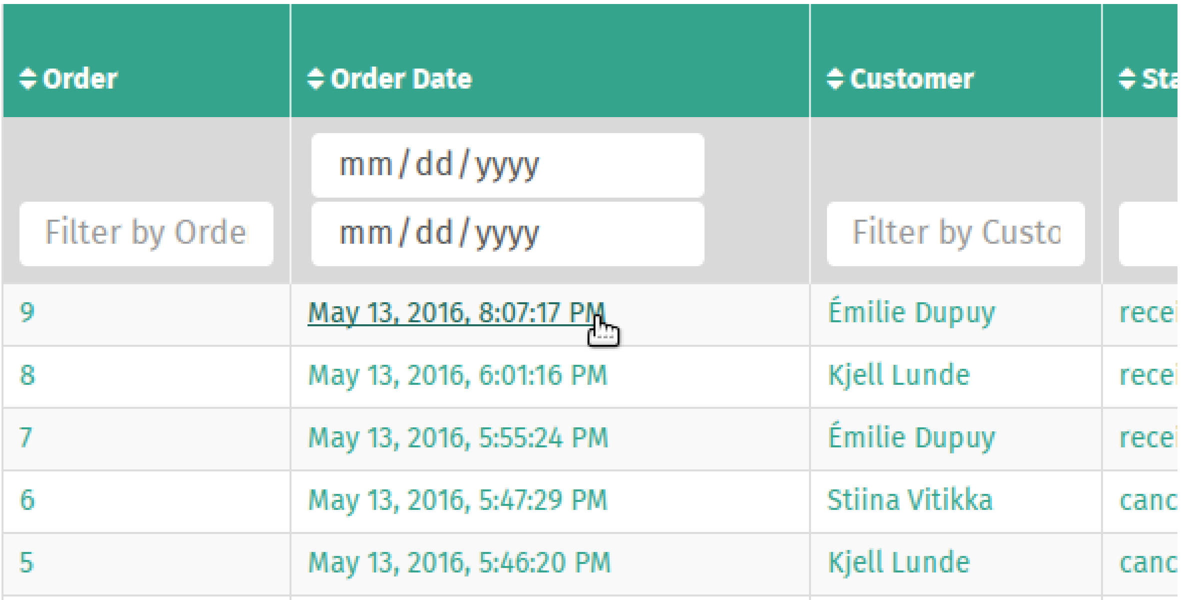
9.4.2 Viewing Order Payments

To view all payments for an order:

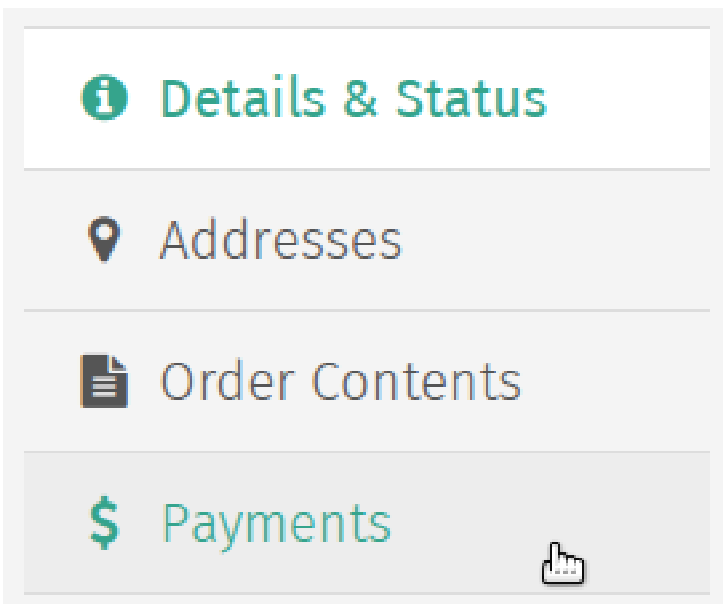
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order whose payments you want to view.

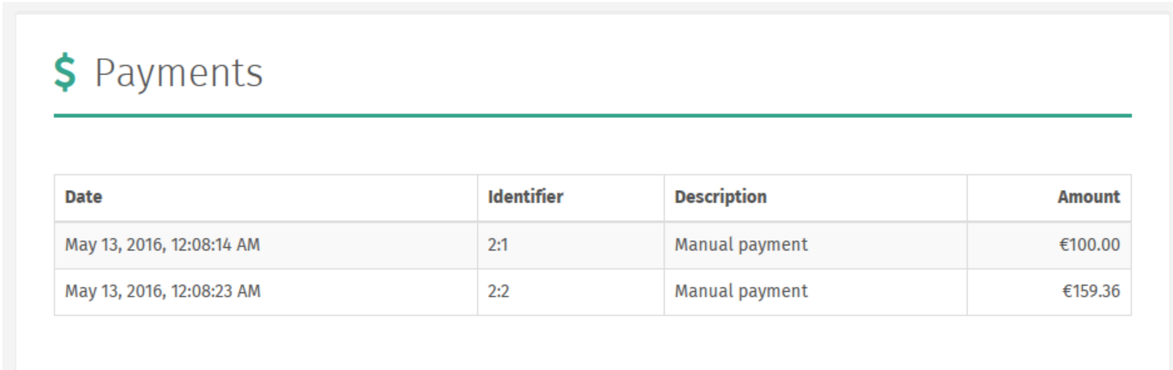


3. Click the *Payments* tab on the left-hand side of the screen.



Note: The *Payment* tab won't be available unless a payment has been created.

4. Details will be listed for all payments associated with that order.



$ Payments

Date	Identifier	Description	Amount
May 13, 2016, 12:08:14 AM	2:1	Manual payment	€100.00
May 13, 2016, 12:08:23 AM	2:2	Manual payment	€159.36

9.5 Order Refunds

Note: Orders can only be refunded once at least one payment has been created for the order.

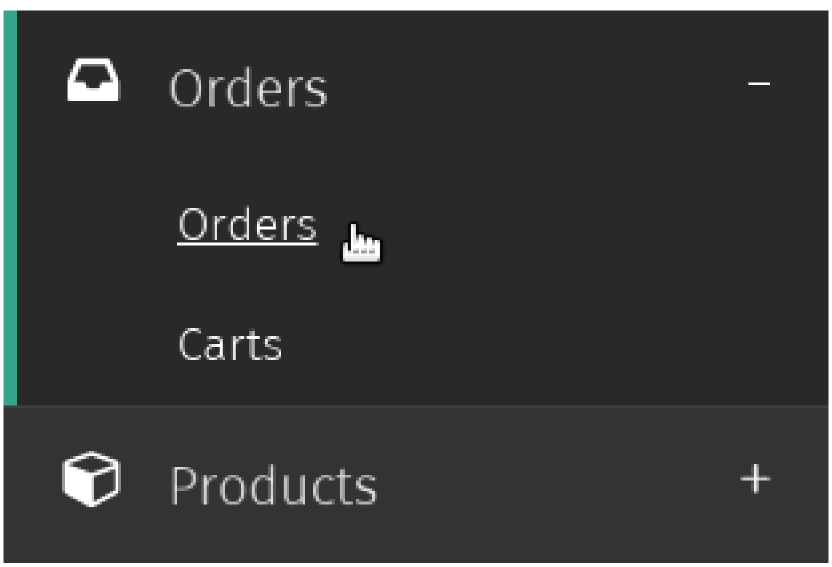
However, refund amounts are not restricted by existing payment amounts, meaning it is possible to refund more than has been actually paid.

If an order cannot be refunded, it will not be visible in the *Actions* dropdown menu.

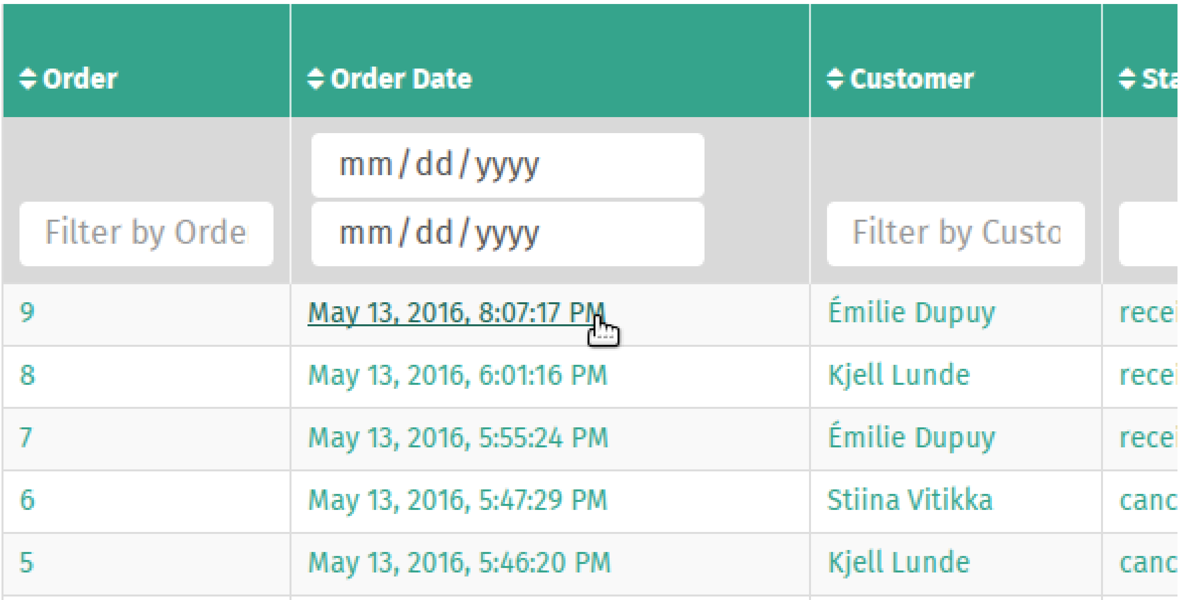
Note: Once a refund has been created, it will appear as a refund line in the *Order Contents* tab.

To create a partial refund for a particular amount or to refund particular order line amounts:

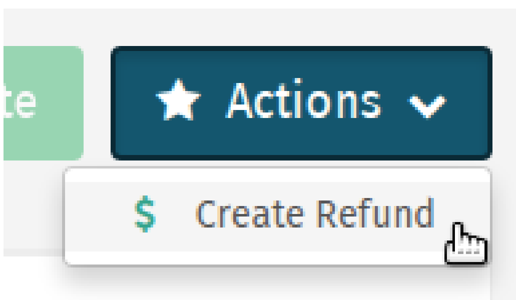
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



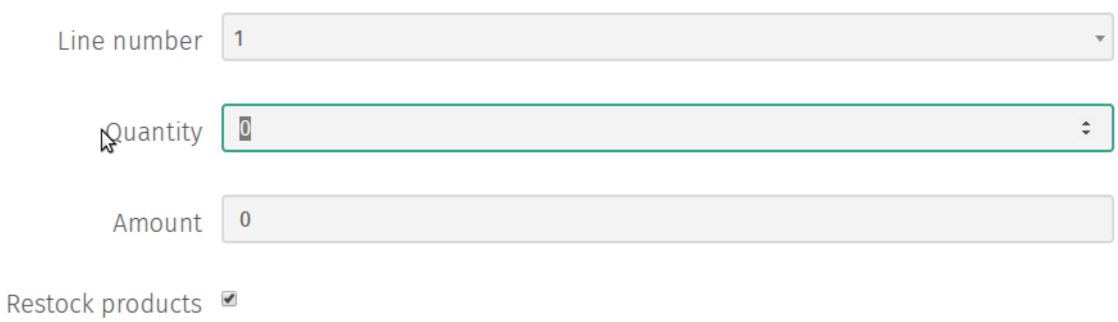
2. Select the order for which you want to create a refund.



3. Click *Create Refund* in the *Actions* dropdown in the admin page's toolbar.



4. To create a refund for a particular line, select the matching line number from the *Line number* dropdown field.



When refunding a product line, a field will appear to enter the quantity, as well as whether to restock the refunded products.

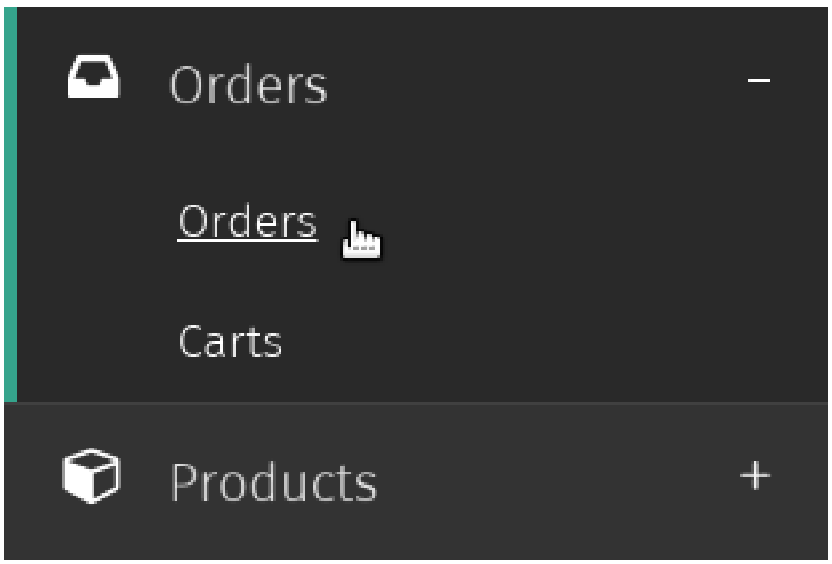
Note: A separate refund line will be created if returning both a quantity and an amount for a particular line.

5. Click the *Add More Refunds* button to add additional refund forms.

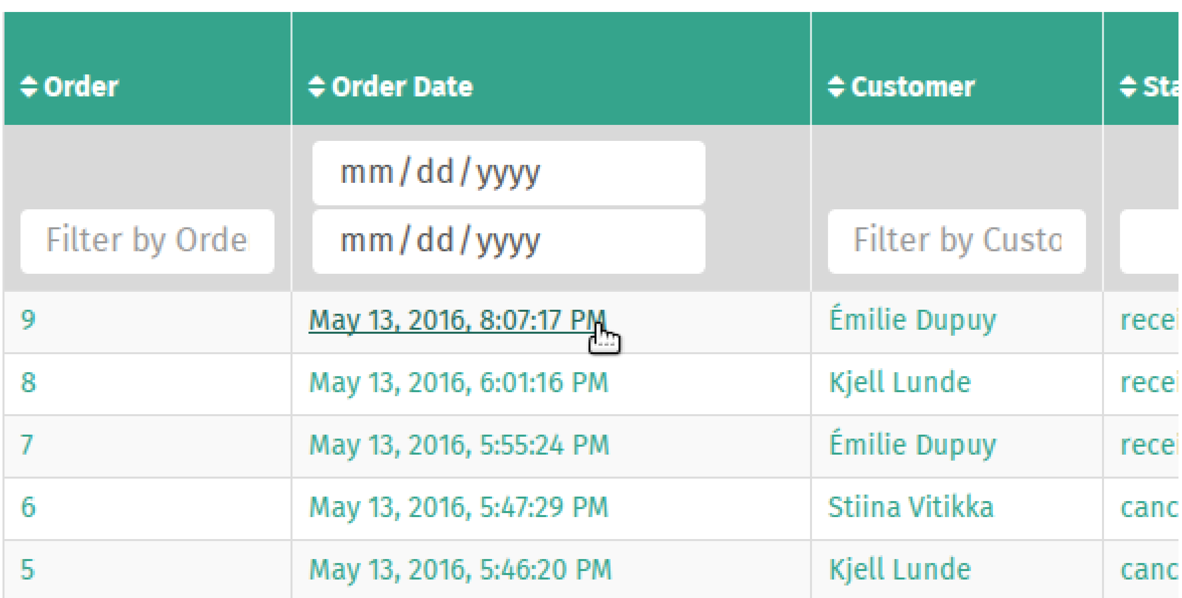
6. Click the *Create Refund* to add the entered refund amounts to the order.

To create a full refund for an order:

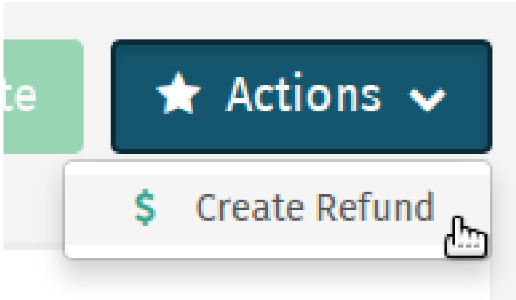
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



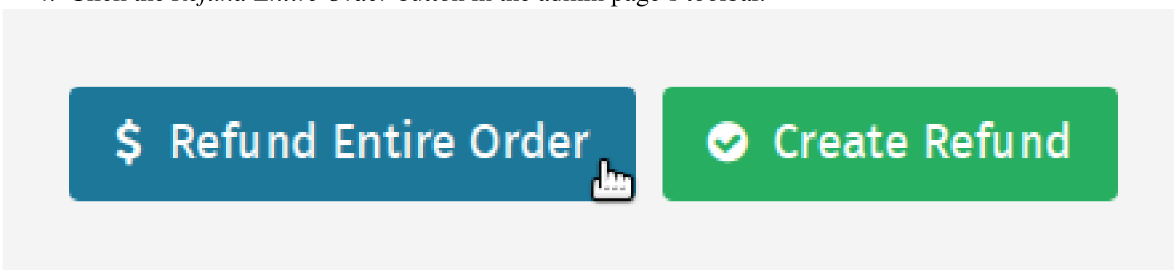
2. Select the order for which you want to create a refund.



3. Click *Create Refund* in the *Actions* dropdown in the admin page's toolbar.



4. Click the *Refund Entire Order* button in the admin page's toolbar.



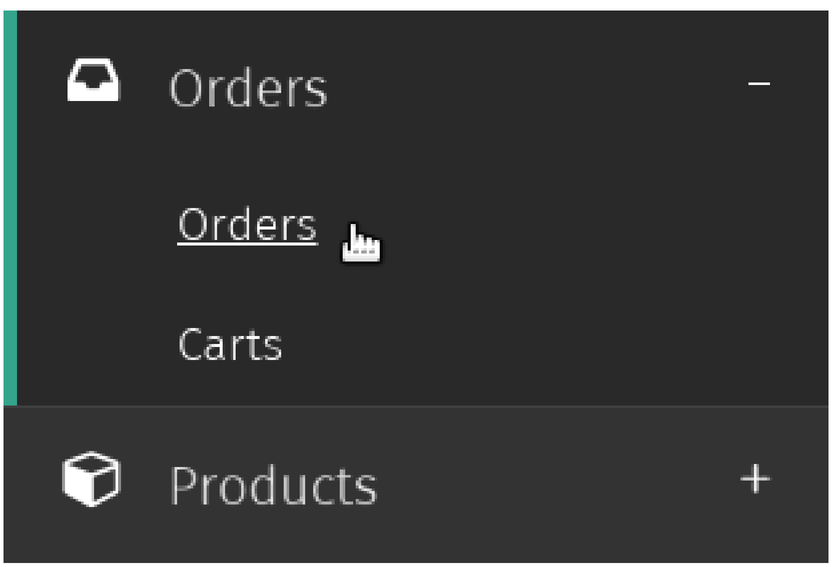
5. Review the order and refund amount information. To restock returned products, make sure the *Restock products* checkbox is selected.
6. Click the *Confirm Refund* to create a refund in the full amount.

9.6 Canceling an Order

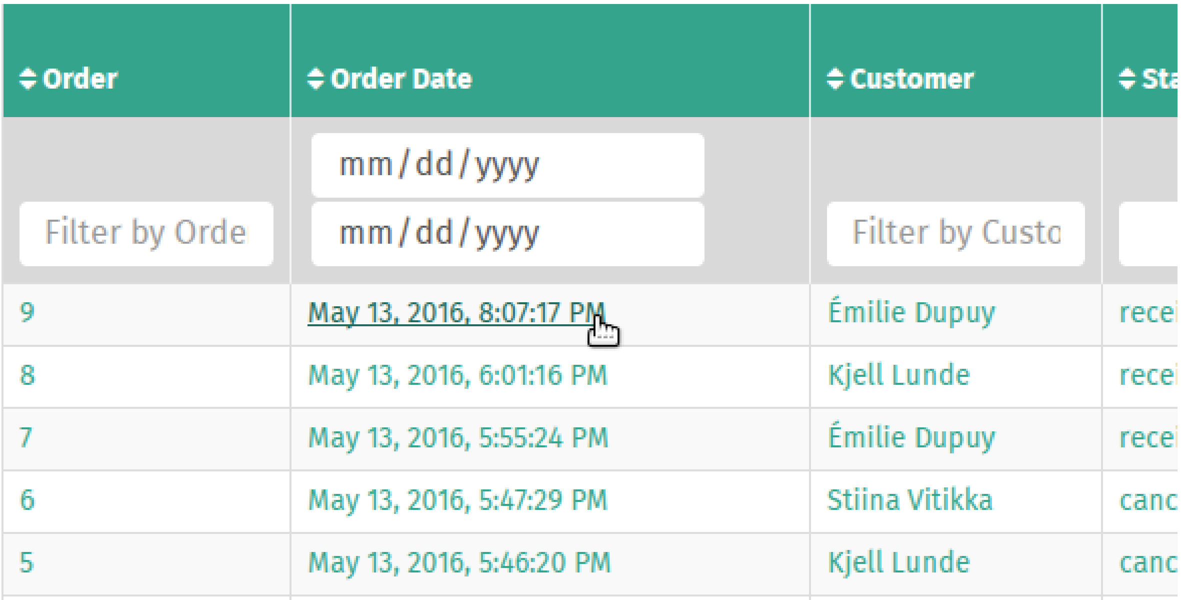
Note: Only unpaid and unshipped orders can be canceled.

To cancel an order:

1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order that you want to cancel.



3. Click *Set Status* in the order toolbar.
4. Click *Canceled* in the dropdown menu.

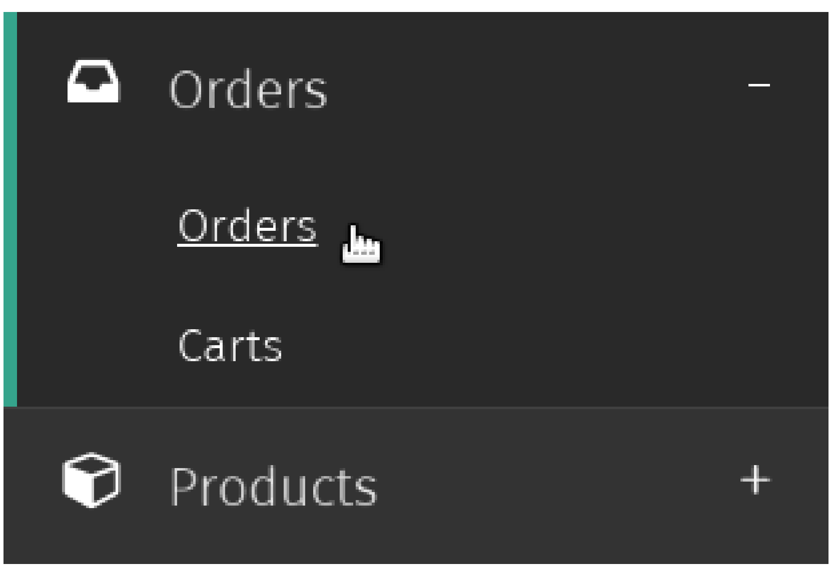
The order will now be marked as *canceled* in the Orders admin list.

9.7 Completing an Order

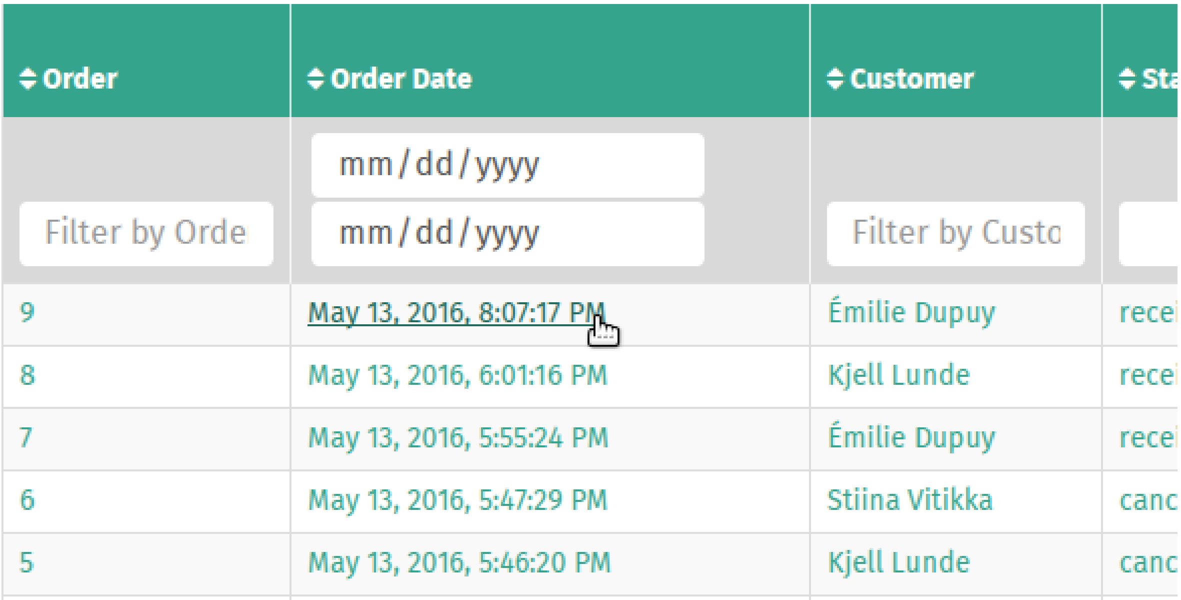
Note: Only fully shipped orders chan be completed.

To set an order as complete:

1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order you want to set complete.

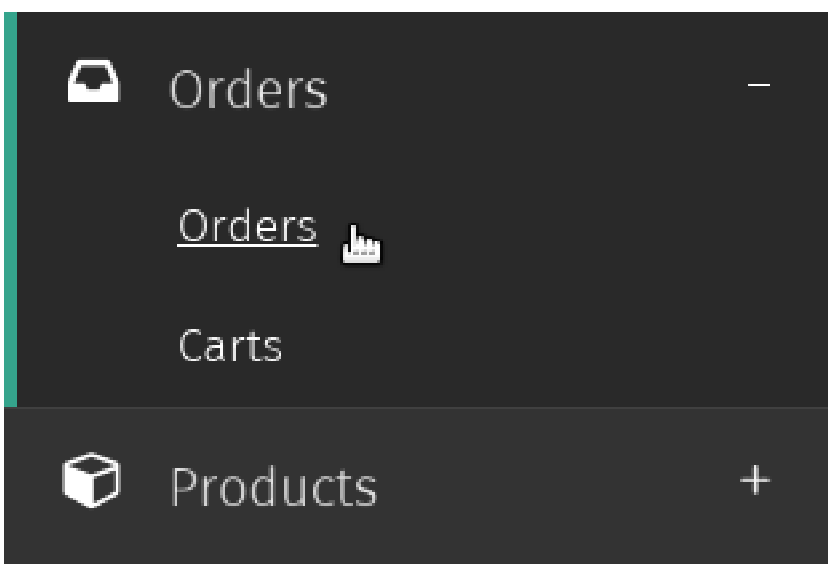


3. Click *Set Status* in the order toolbar.
4. Click *Complete* in the dropdown menu.

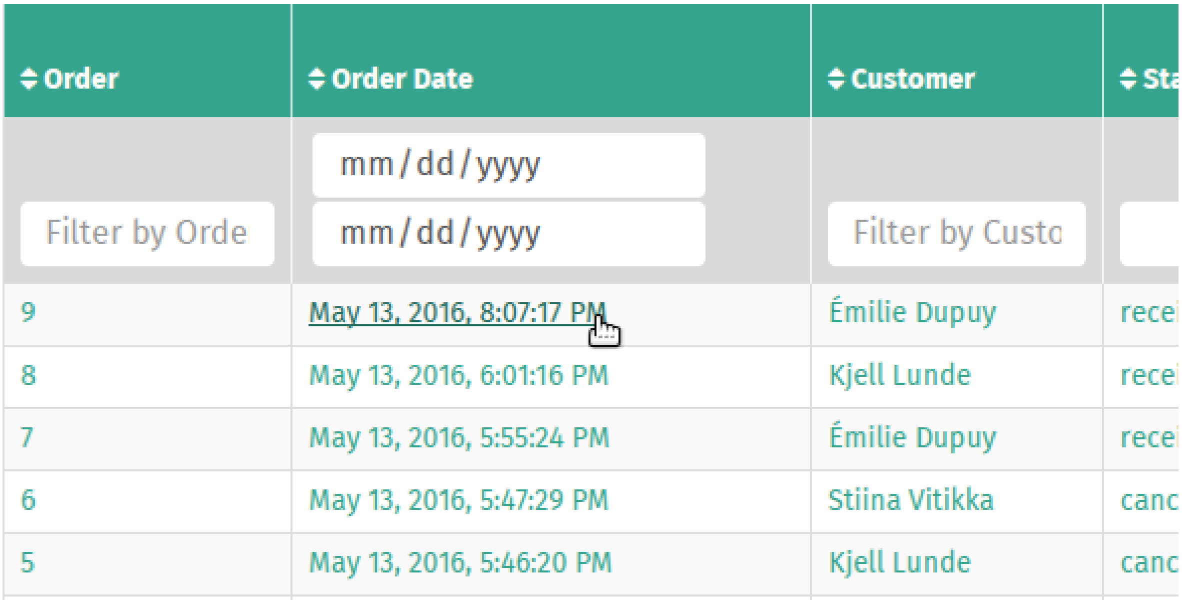
The order will now be marked as *completed*.

9.8 Printing an Order Confirmation

1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order whose confirmation you want to print.



3. Click *Printouts* tab on the left-hand side of the screen.
4. Select *Get Order Confirmation HTML* from the dropdown menu.
5. You will now be taken to the order confirmation, which you can either print or save to your computer from your browser menu.

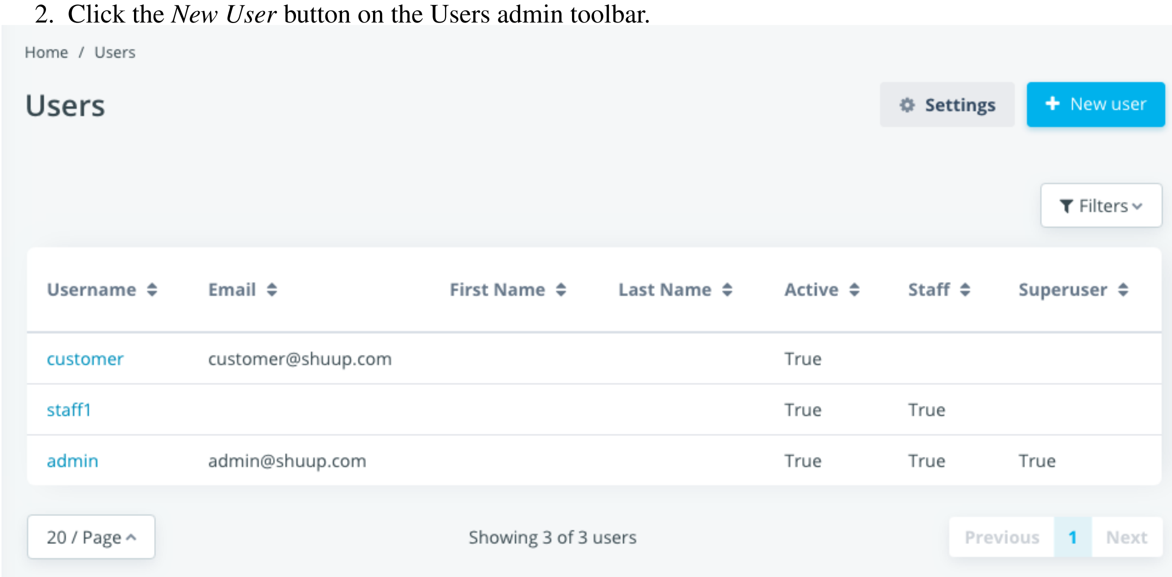
CHAPTER 10

Customers and Users

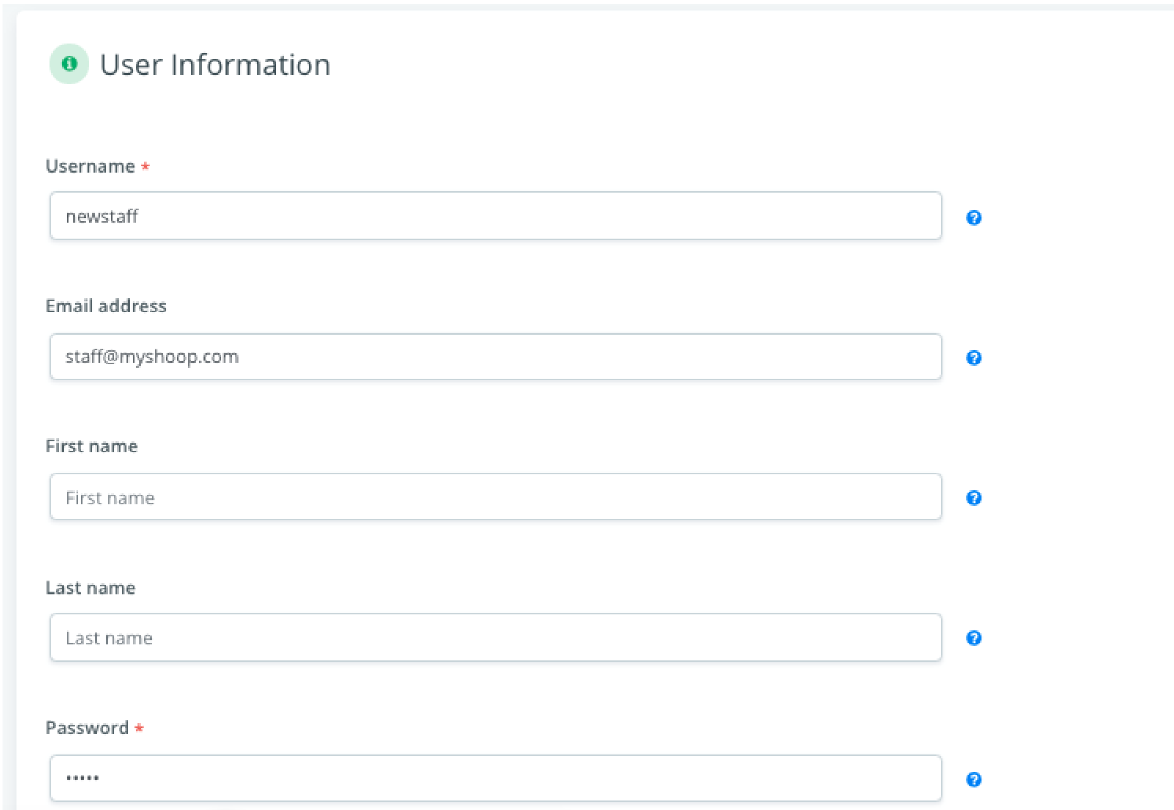
10.1 Users

10.1.1 Creating a User

1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.
2. Click the *New User* button on the Users admin toolbar.



3. Enter a valid username and password for the user as well as any other user information, including the *Staff User* checkbox. A Staff user has the ability to login in the admin panel.
4. Then click the *Save* button in the to create the user account.



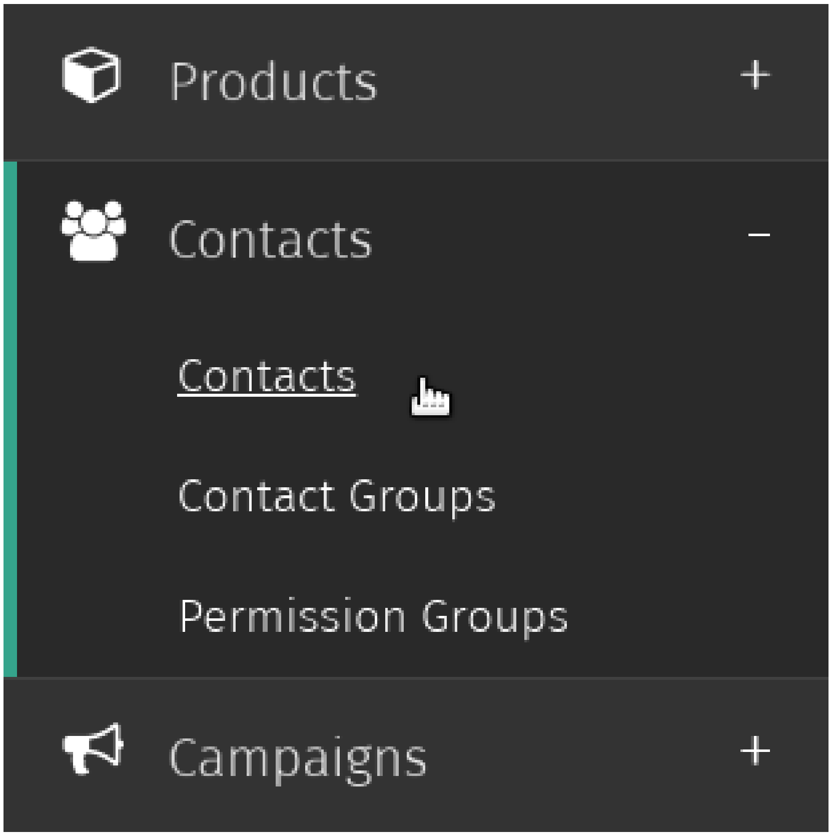
Note: Unless they have a *Staff status* and the *Send email confirmation* box is checked, a user won't automatically receive notice that an account has been created for them.

Instead, if you would like to notify a user, send a password-reset email.

See *Sending Password-Reset Emails*.

10.1.2 Creating a User From a Saved Contact

1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.

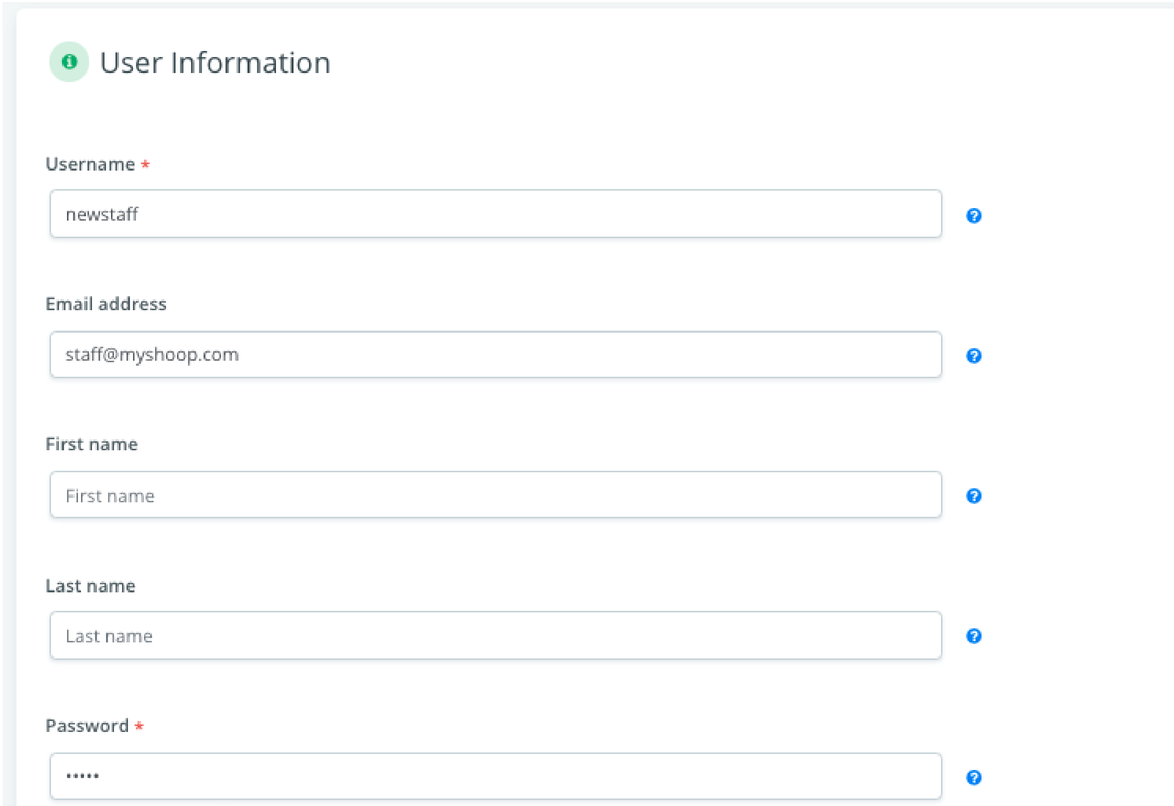


2. Select the contact for which you want to create a user account.

Name	Type	Email	Phone
Filter by Name		Filter by Email	Filter by Phone
	Person	admin@shoop.local	
Émilie Dupuy	Person	lemonnier.lucie@noos.fr	0405929976
Stiina Vitikka	Person	kauno24@koistinen.org	+358 41 5068045
Véronique Morin	Person	fguibert@boyer.com	01 07 50 86 70
Mats Ekman	Person	phelgesson@malmqvist.se	08-730 508 11
Kjell Lunde	Person	faasen@eliassenamundsen.net	39010768

3. Click the *Options* button on the Contact admin toolbar and select *New User*.

4. Enter the new user's username and password information and click *Save* to create the user account, which will now be associated with the selected contact information.

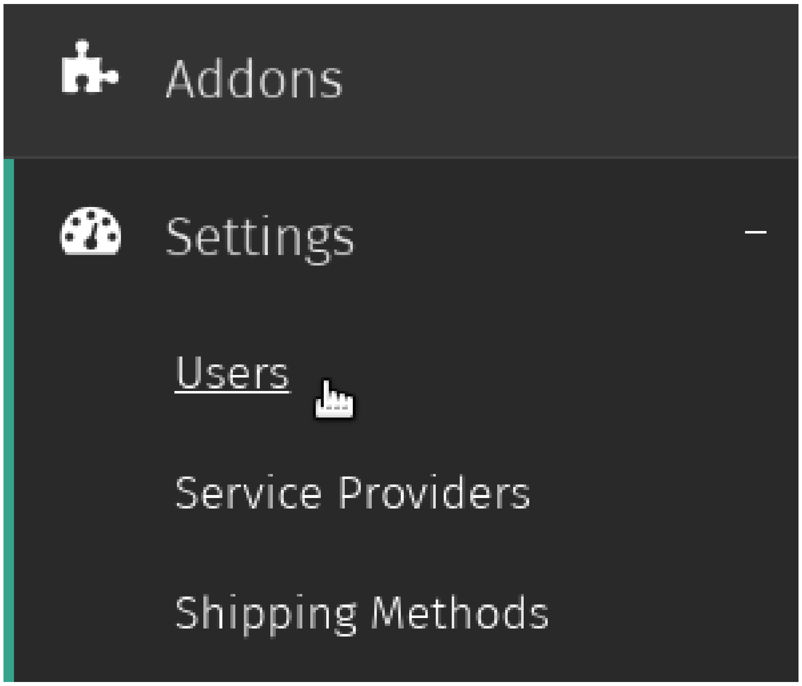


See *Creating a User* for more information.

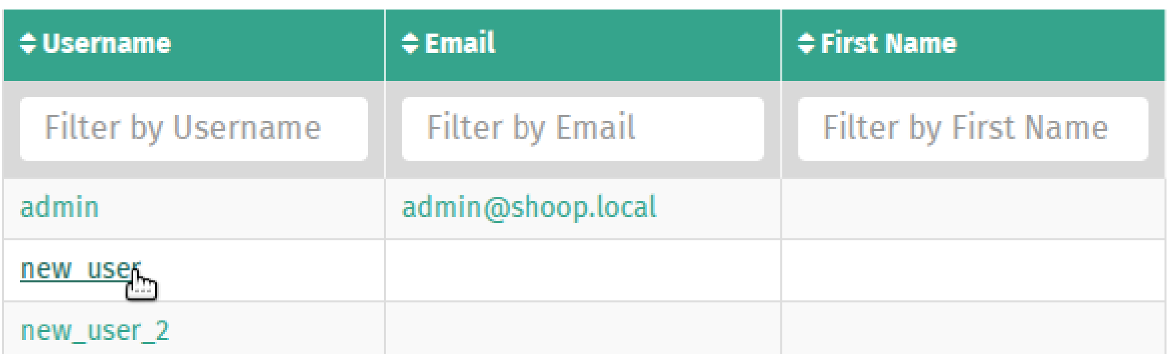
10.1.3 Managing User Passwords

Changing User Passwords

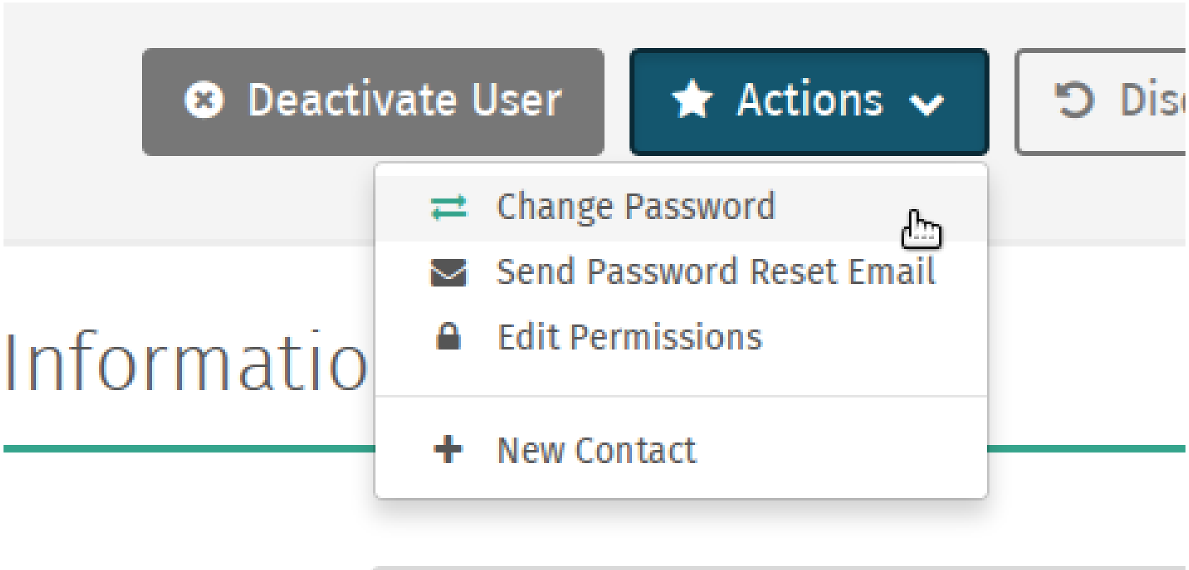
1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.



2. Select the user whose password you want to change.



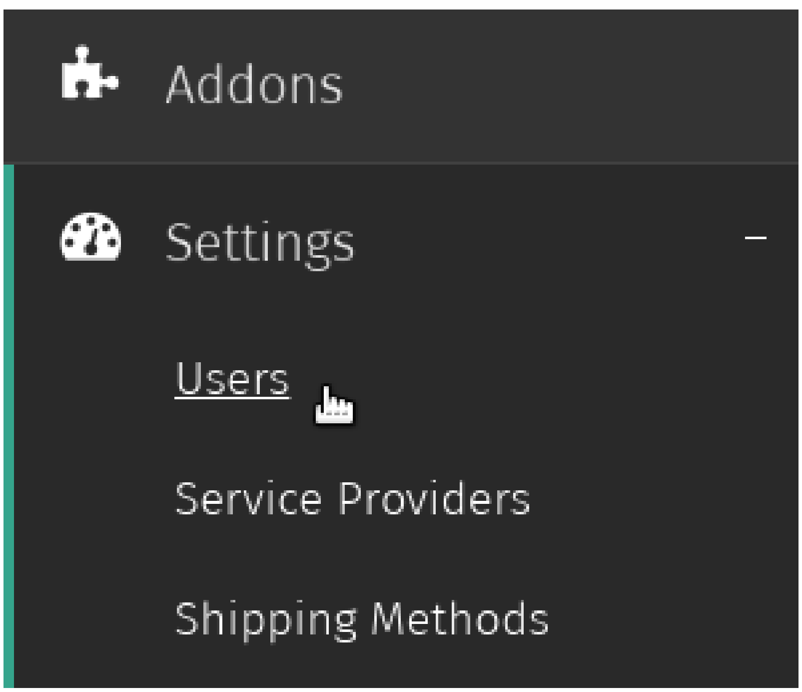
3. Click the *Actions* button on the user admin toolbar and select *Change Password* from the dropdown menu.



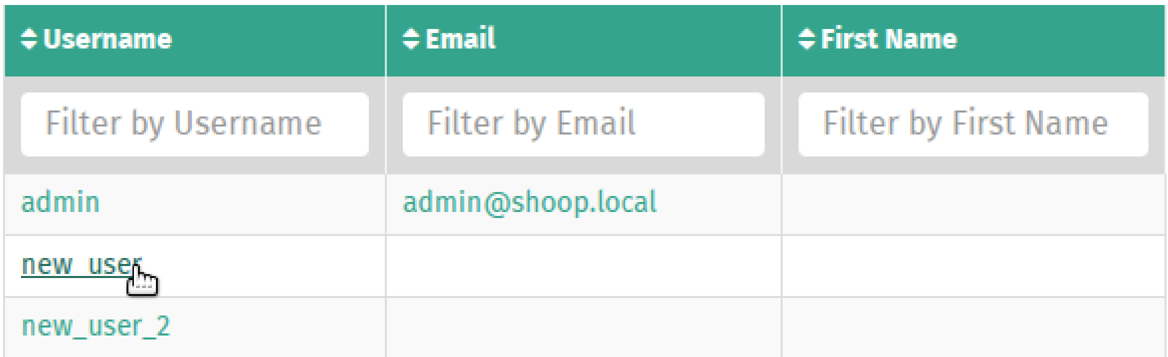
4. Enter the current and new passwords in the *Change User Password* form and click *Save* in the toolbar to save the new password.

Sending Password-Reset Emails

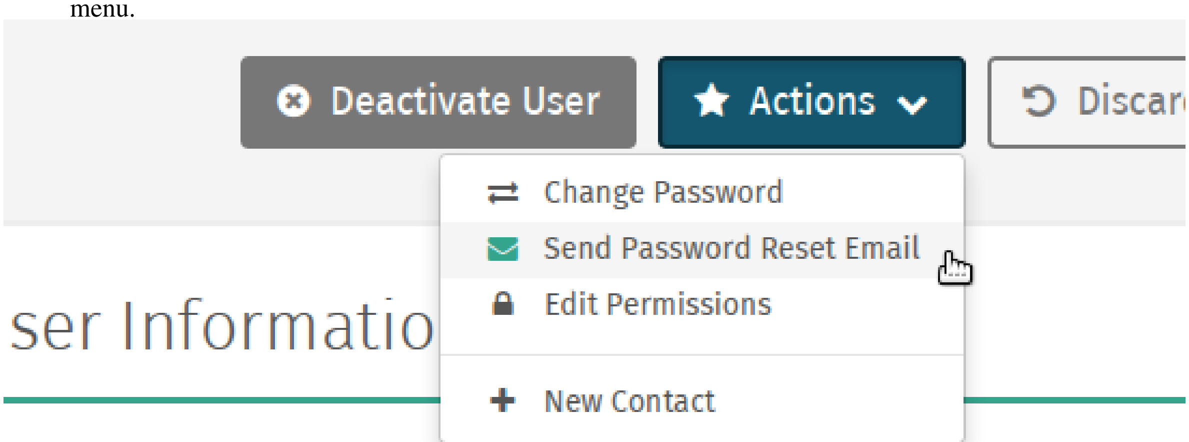
1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.



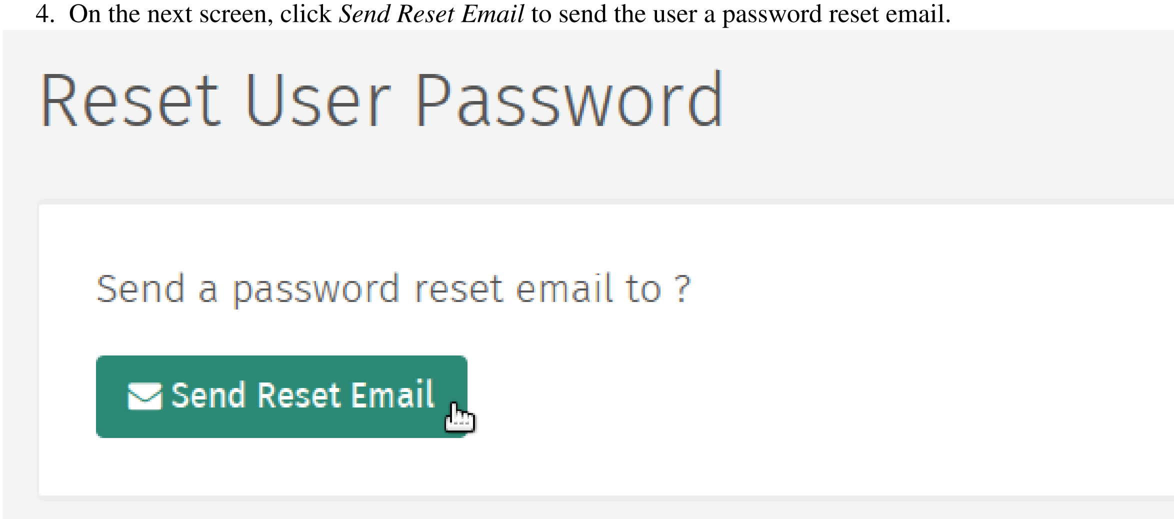
2. Select the user whose password you want to change.



3. Click the *Actions* button on the user admin toolbar and select *Send Password Reset Email* from the dropdown menu.



4. On the next screen, click *Send Reset Email* to send the user a password reset email.

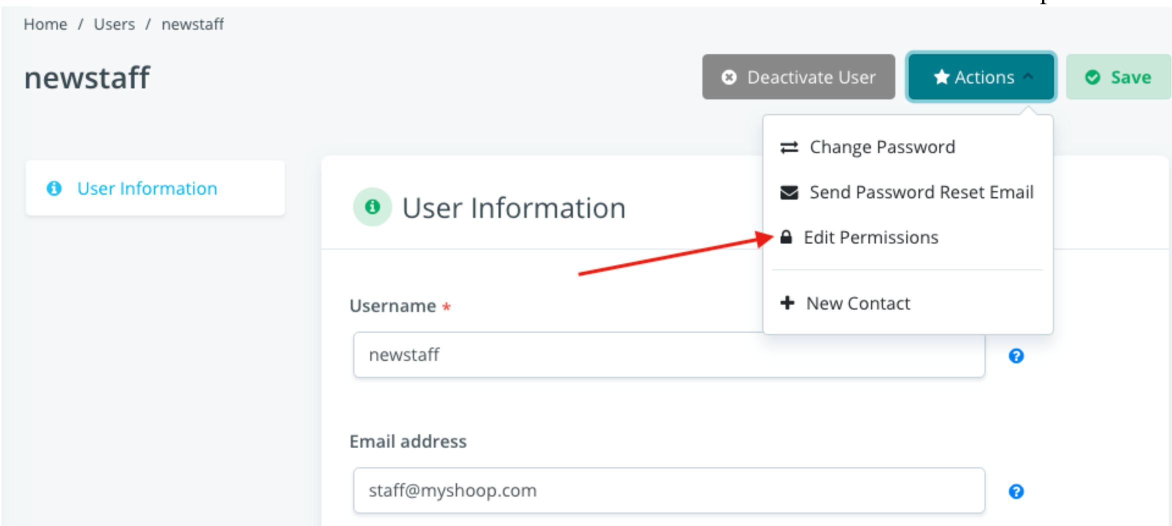


10.1.4 Editing User Permissions

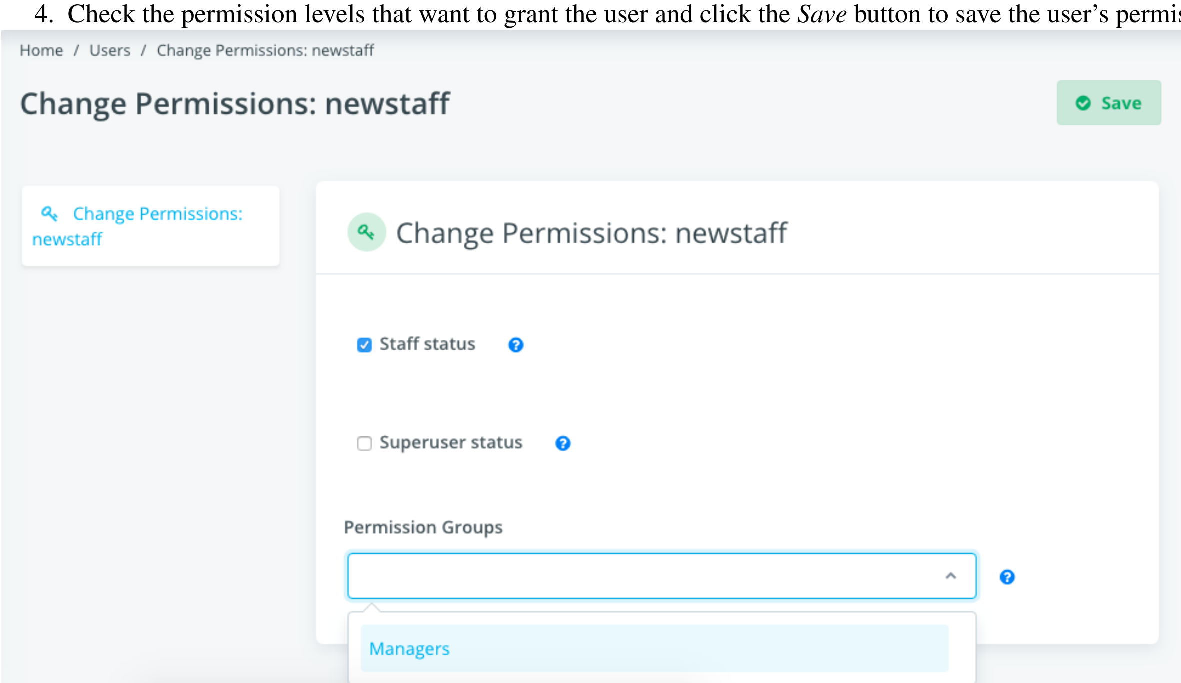
Warning: Use caution when granting users administrative permissions.

1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.

2. Select the user whose permissions you want to edit.
3. Click the *Actions* button on the user admin toolbar and select *Edit Permissions* from the dropdown menu.



4. Check the permission levels that want to grant the user and click the *Save* button to save the user's permissions.



See *Permission Groups* for more information on how to create and manage Permission Groups.

10.1.5 Deactivating a User

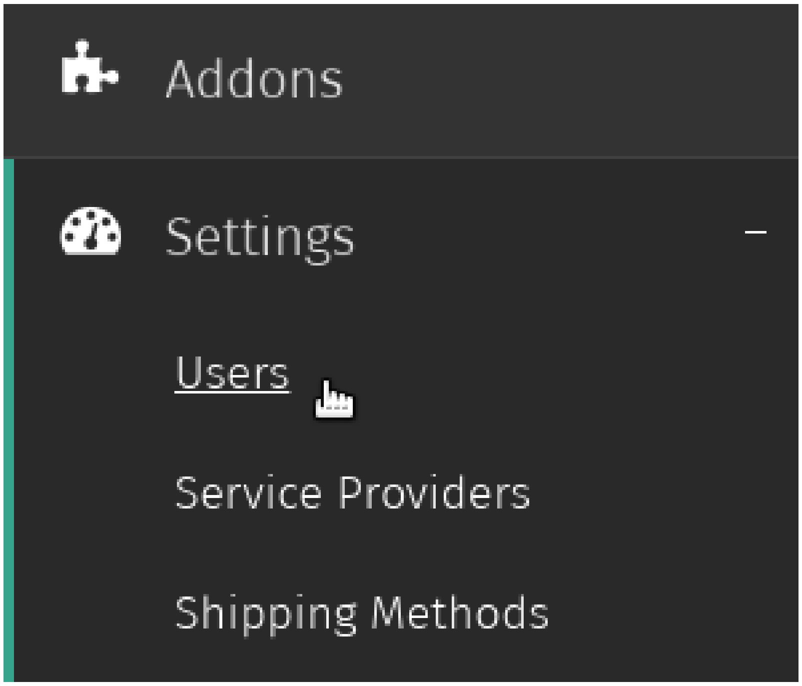
When users are deactivated, they remain in your system however they will no longer be able to log in to their account and by default are not displayed when first opening the Users admin page.

Note: If a user has an associated contact, deactivating the user's user account will not deactivate their contact, although it will prevent them from logging in, essentially accomplishing the same thing.

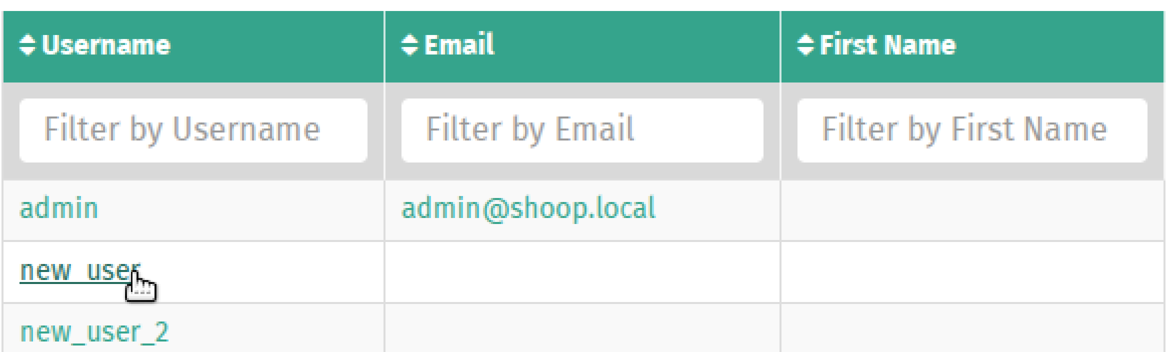
See *Deactivating a Contact* for more information.

To deactivate a user:

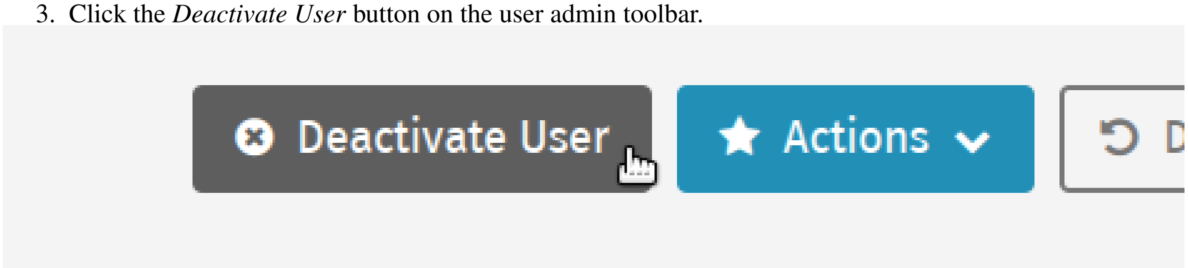
1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.



2. Select the user you want to deactivate.



3. Click the *Deactivate User* button on the user admin toolbar.



4. The user will now be deactivated, and the *Deactivate User* button will be replaced with an *Activate User* button.

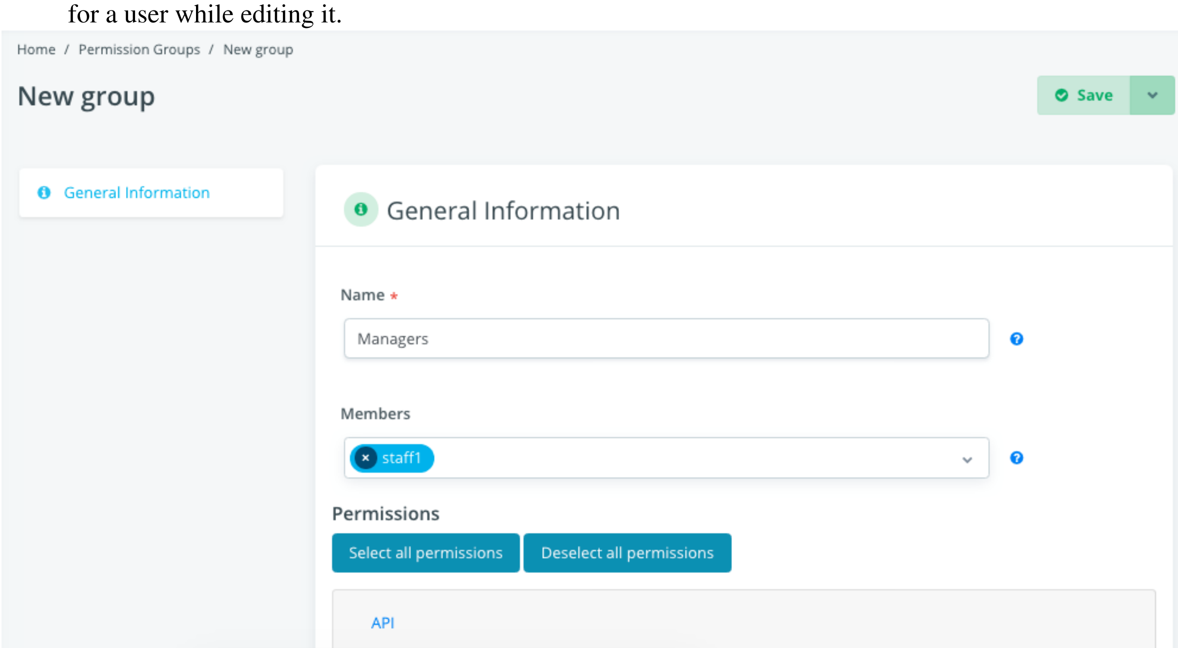
Note: The same steps can be followed to activate a deactivated user.

10.2 Permission Groups

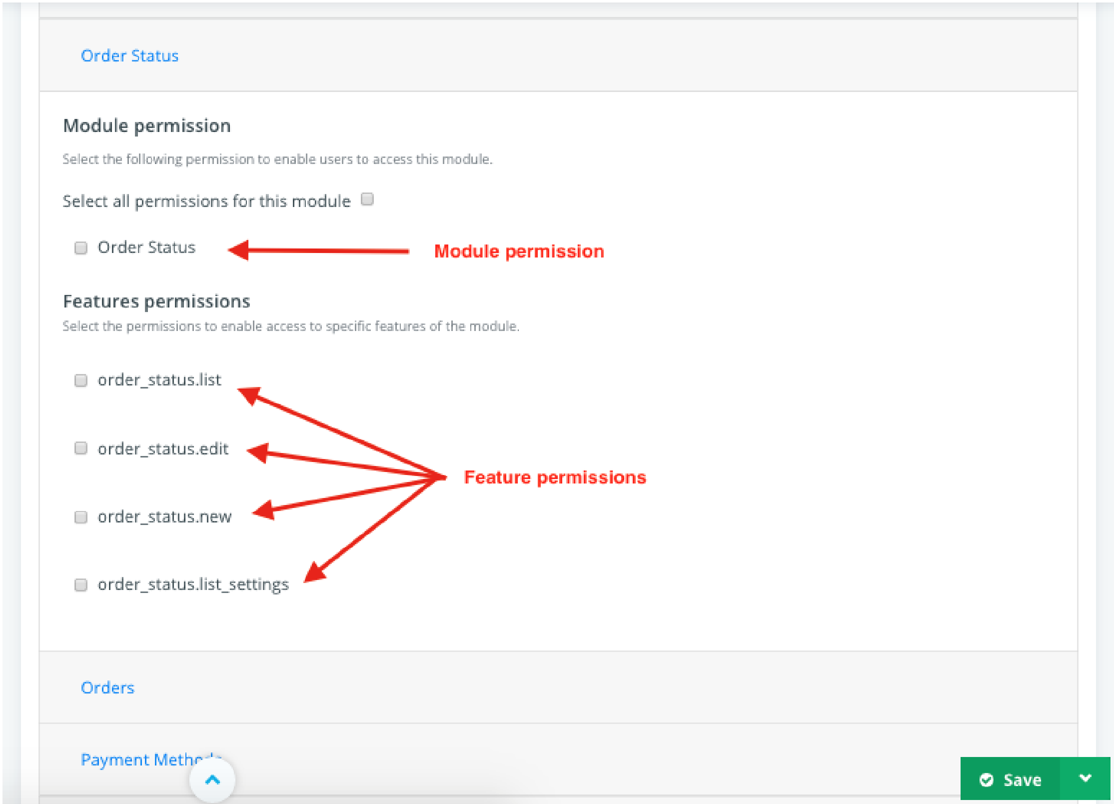
Permission groups can be used to restrict access to different sections of the Shuup admin for staff-level users. Superusers have unrestricted access to any section.

10.2.1 Creating a Permission Group

1. Navigate to the Permission Groups admin page by clicking *Permission Groups* under the *Shops* category from the Shuup Admin menu.
2. Click the *Create New Permission group* button on the Permission Group admin toolbar.
3. Enter a name for the group, select any users that should be members of this group. You can also set the group for a user while editing it.



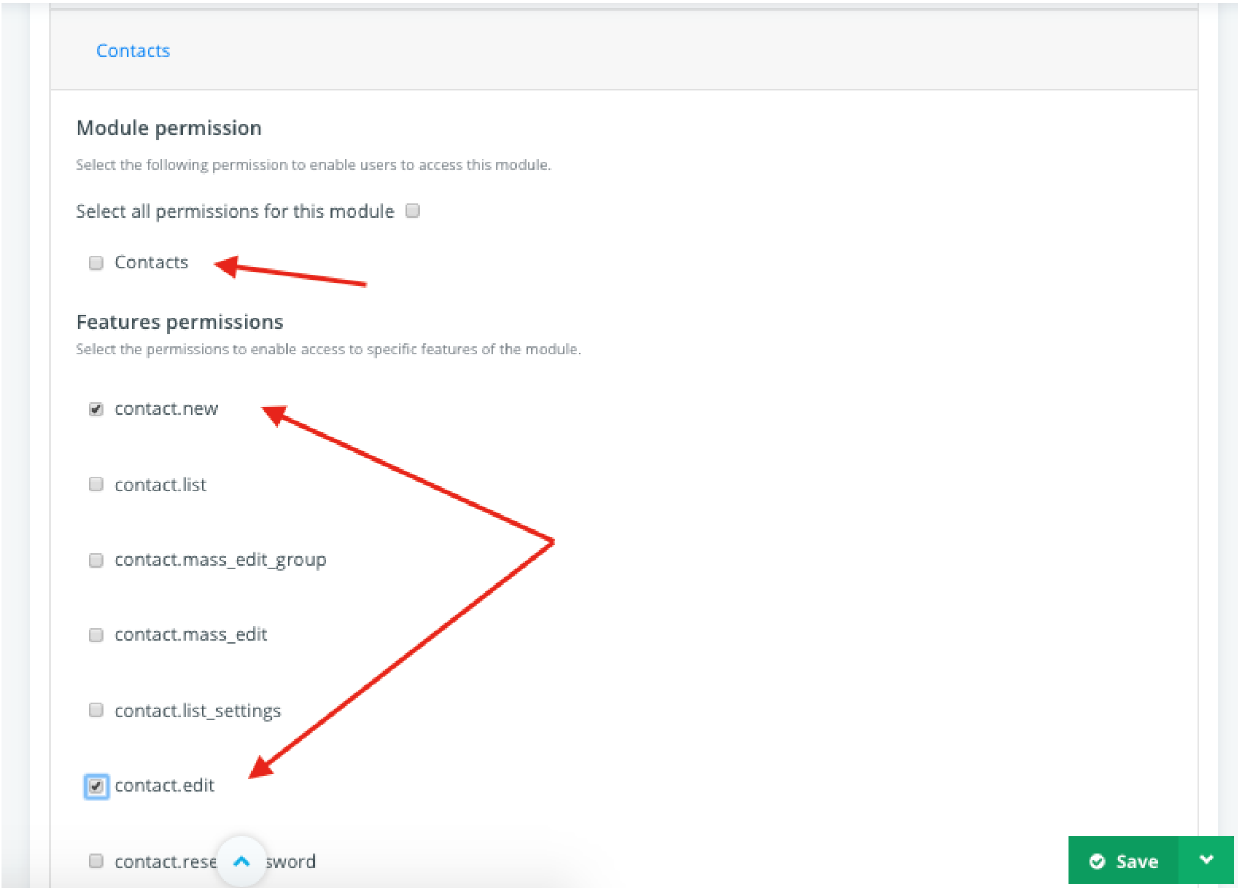
4. go through all the permissions sections and check the features you want to give permission.



Note: On every permission section, you will see *Module permission* and *Features permissions*. If you give the *Module permission*, it will tell to Shuup that the user can access the module as a whole. Users will be able to access the module through the main menu for example.

You can also give specific features permissions that will enable users to create, delete, list objects and other features that the module provides. You can give permission for the features and have the *Module permission* disabled at the same time. Disabling the module permission won't interfere on the feature permission as they are complements of each other.

One example for this is when you want to allow users to create customers while they are creating an order, but you don't want them to access the customer list through the main menu. On this case you disable the customer module permission and enable the customer edit feature permission.



The buttons *Select all permissions* and *Deselect all permissions* will check or uncheck all the permissions which can be helpful when you want to disable just a few permissions for the user.

5. Click *Save* to save the permission group settings.

See *Editing User Permissions* for more information on how to set specific permissions for a single User.

10.3 Contacts

Shuup contacts store contact information such as address data, email, or phone numbers, and a contact may or may not be associated with a user account.

Contacts may be one of the two following types:

Person contact Contact associated with a person.

Company contact Contact associated with a company.

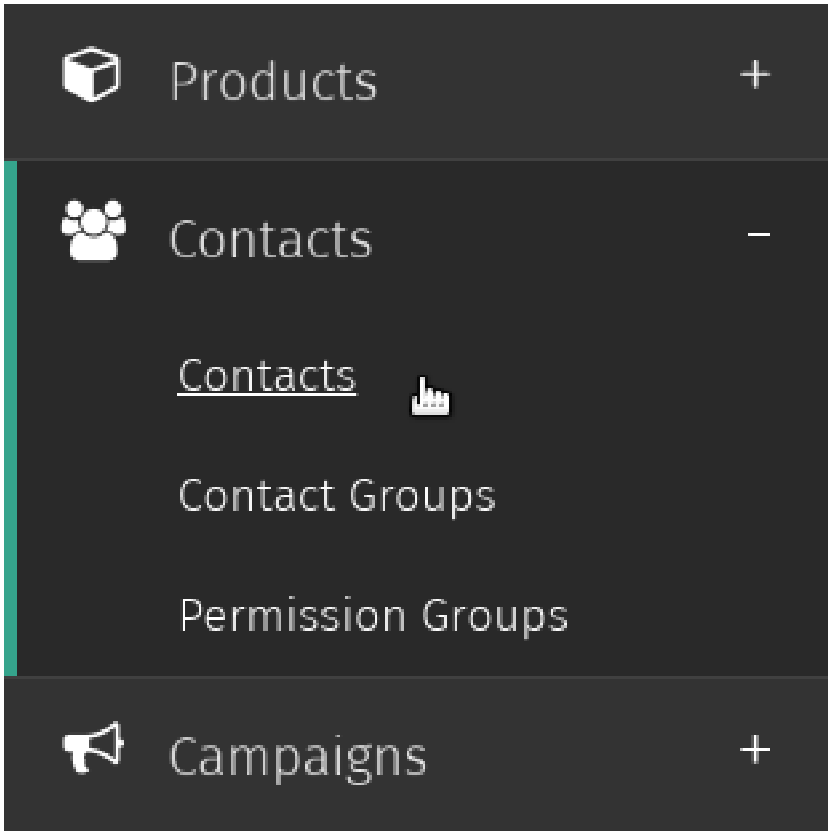
One or more person contacts may be *members* of a company contact.

However, if a user has a contact associated with their account, it must always be a *person*-type contact, which may then be a member of one or more *company* contacts.

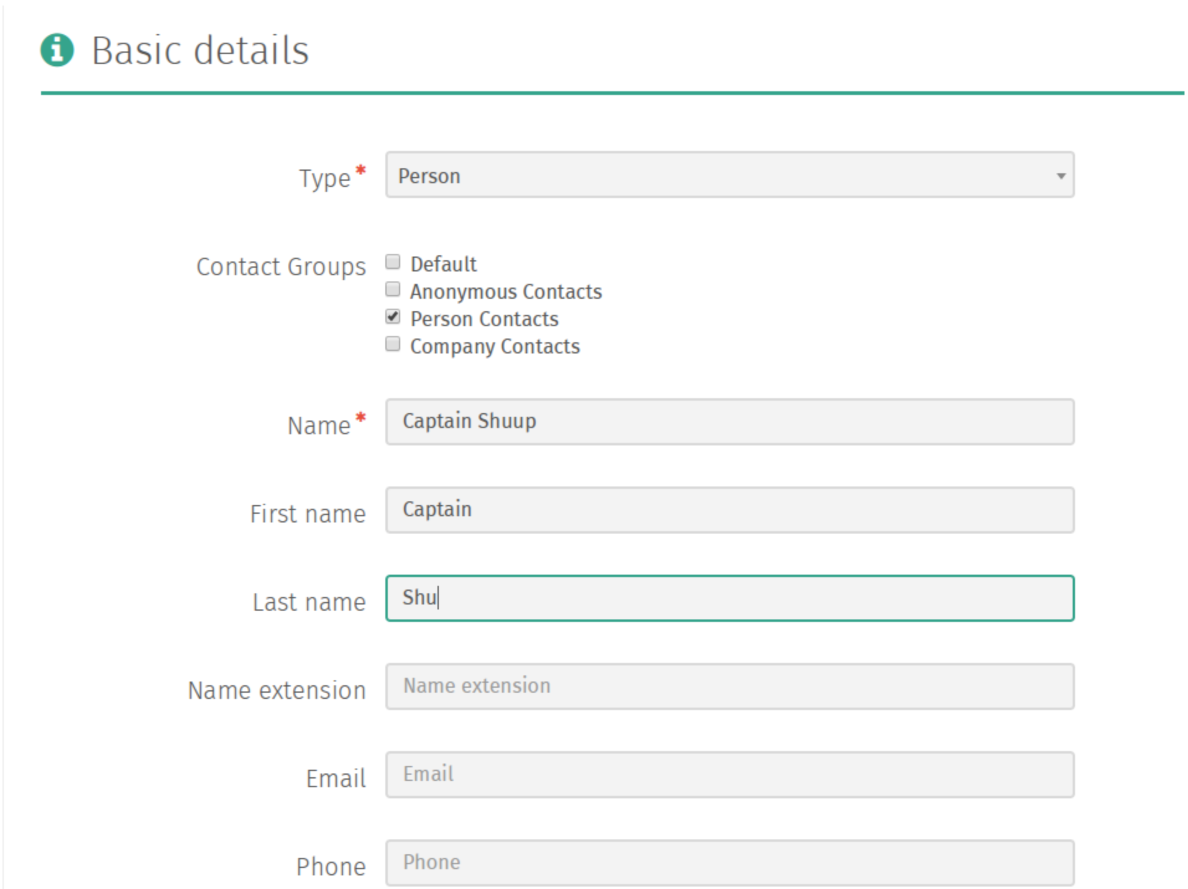
If a user's person contact is linked to a company, the company's contact information will be used when placing orders.

10.3.1 Creating a Contact

1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



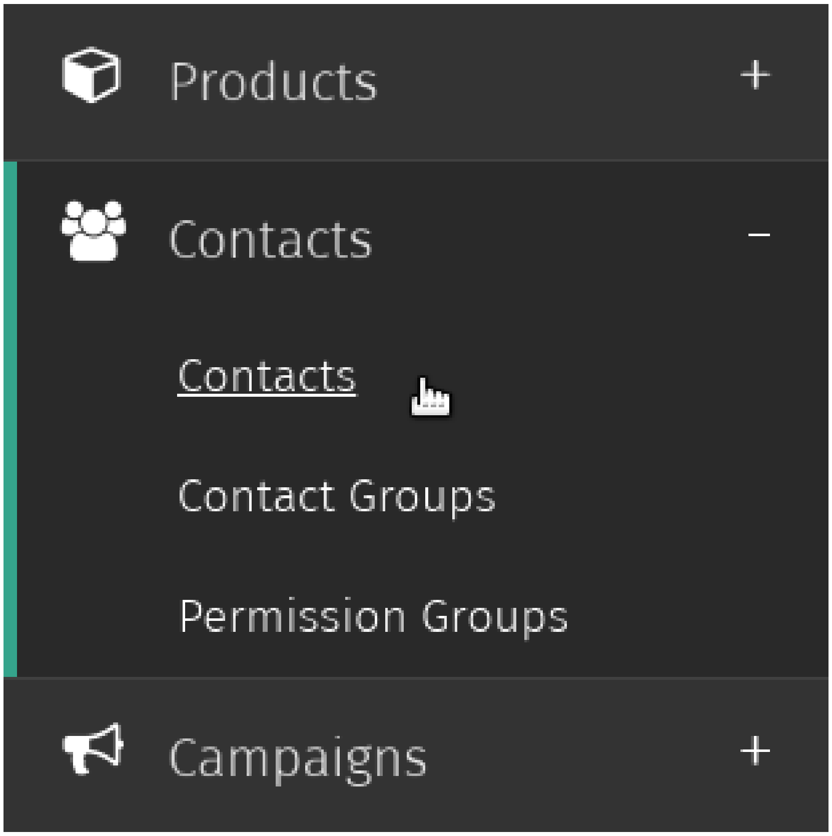
2. Click the *New Person* or the *New Company* button on the Contacts admin toolbar.
3. Enter all basic details for the contact, including any required fields.



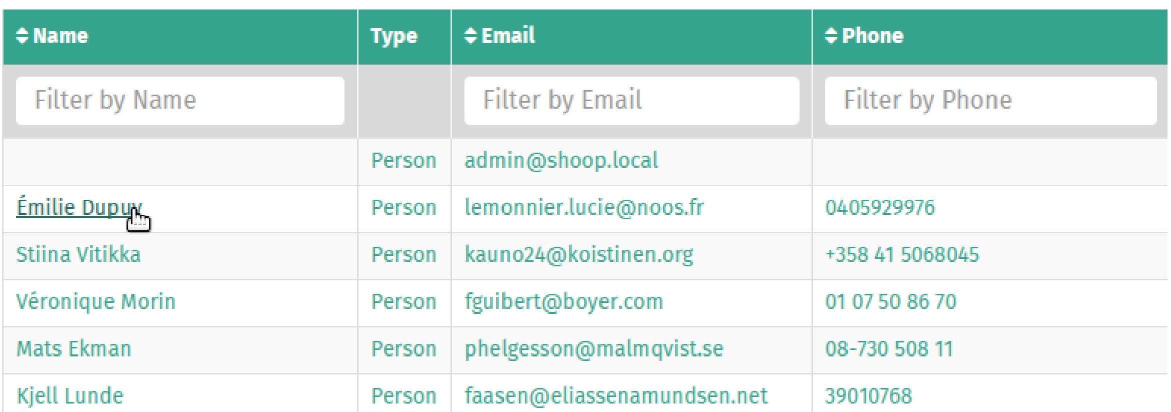
4. Click the *Save* button to create the contact.

10.3.2 Editing a Contact

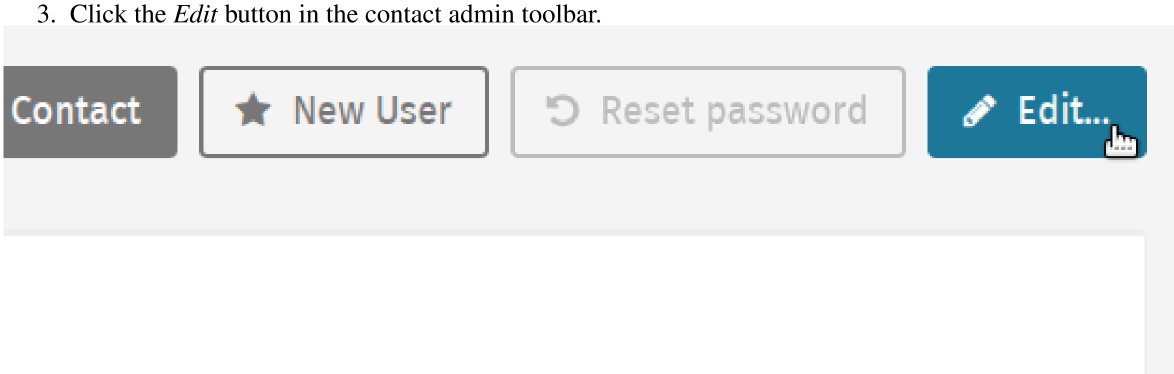
1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



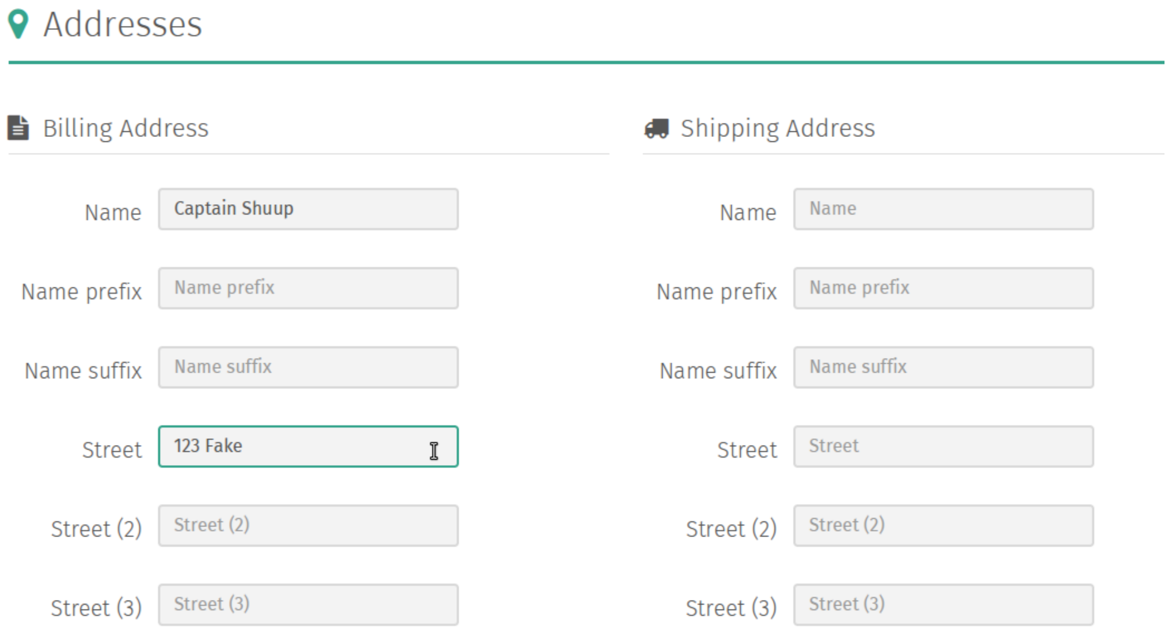
2. Select the contact that you want to edit.



3. Click the *Edit* button in the contact admin toolbar.



4. Edit the user's information.
5. Click the *Addresses* tabs on the left-hand side of the screen to enter billing and shipping address information for the contact.

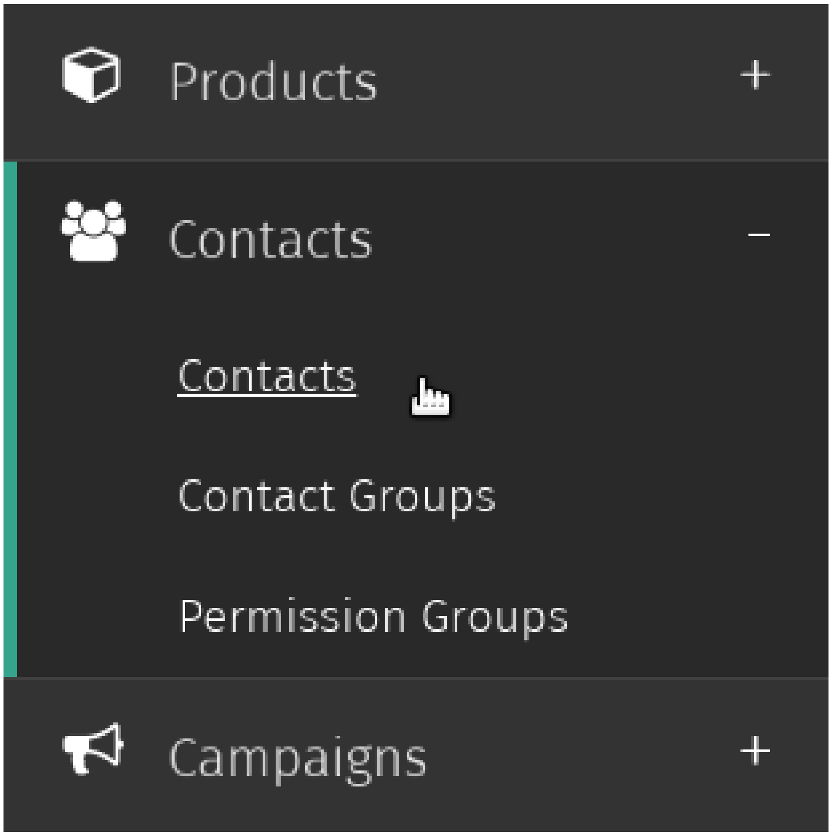


6. Click *Save* to save the contact's information.

   See *Creating a Contact* for more information.

10.3.3 Editing Company Membership

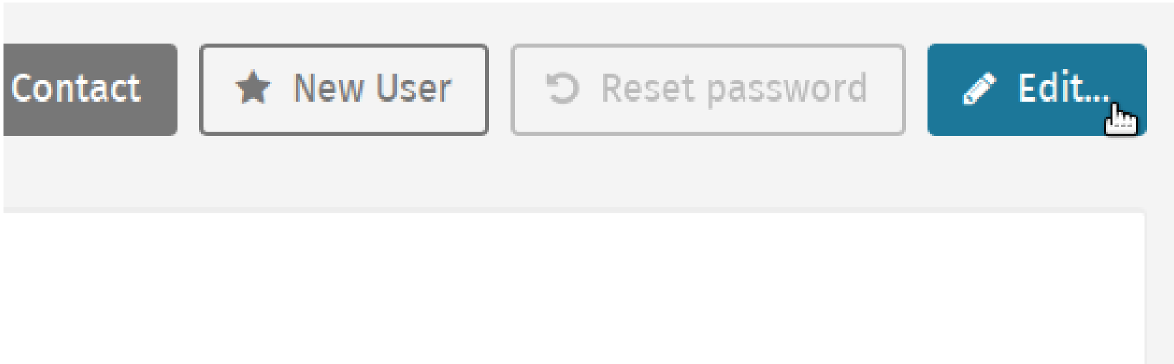
1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



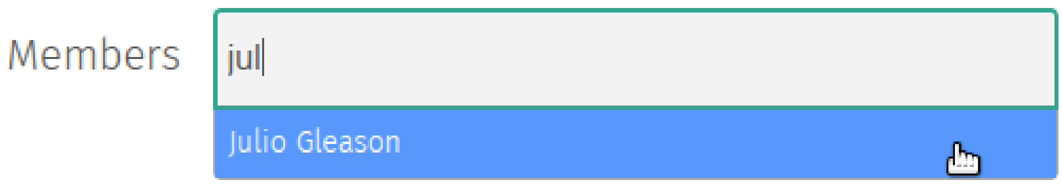
2. Select the company contact whose membership you want to edit.

Joaquim Sá	Person	mmendes@gomes.pt	(351) 963 901 363	yes
Jorge Castro	Person	emma72@clix.pt	+351965449468	yes
Cornel Harris	Person	theophile.vonrueden@orn.org.au	02 9532 6183	yes
अखिल डानी	Person	z@gmail.com	04679951376	yes
Captain Shuup	Person			yes
Your Company, Inc.	Company	yourcompany@shuup.com		yes

3. Click the *Edit* button in the contact admin toolbar.



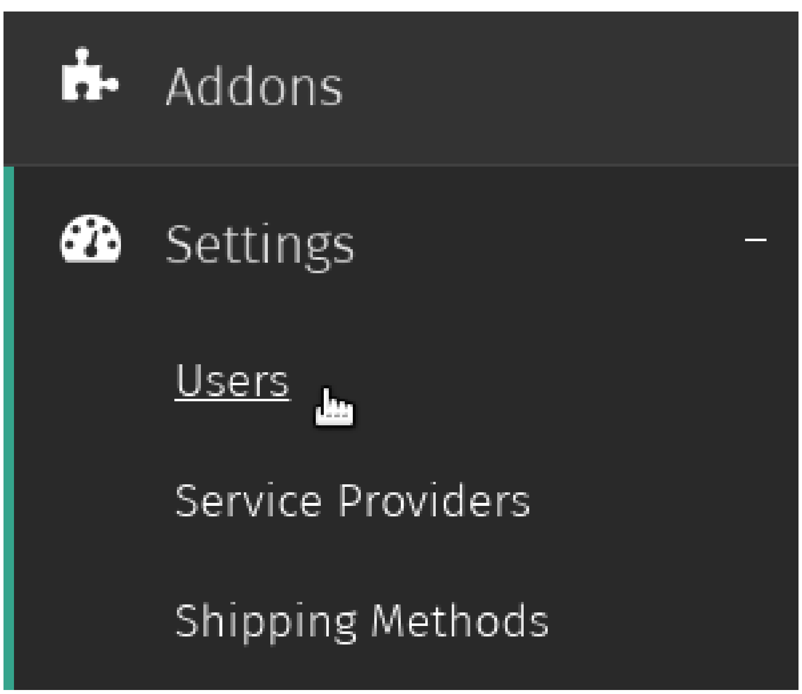
4. Under the *Members* field input, type the name of the person contact you wish to add to the company. When the name appears in the dropdown, click to add to the input field.



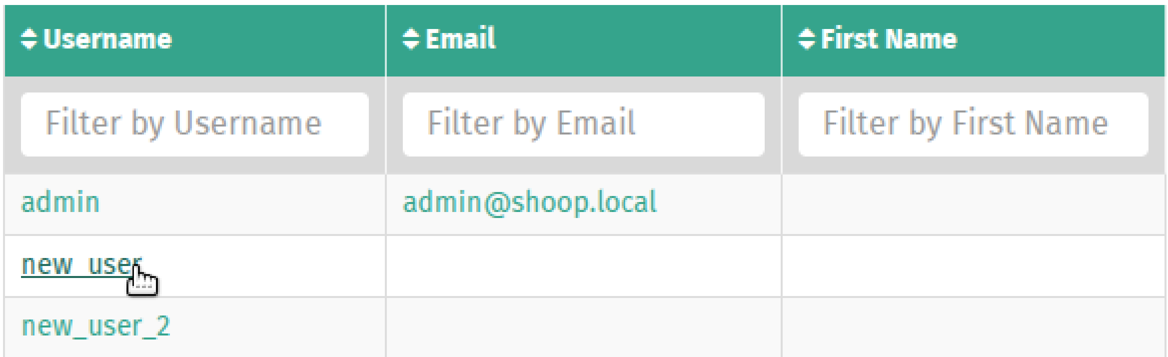
5. Click save to update the company's memberships.

10.3.4 Creating a Contact From a User Account

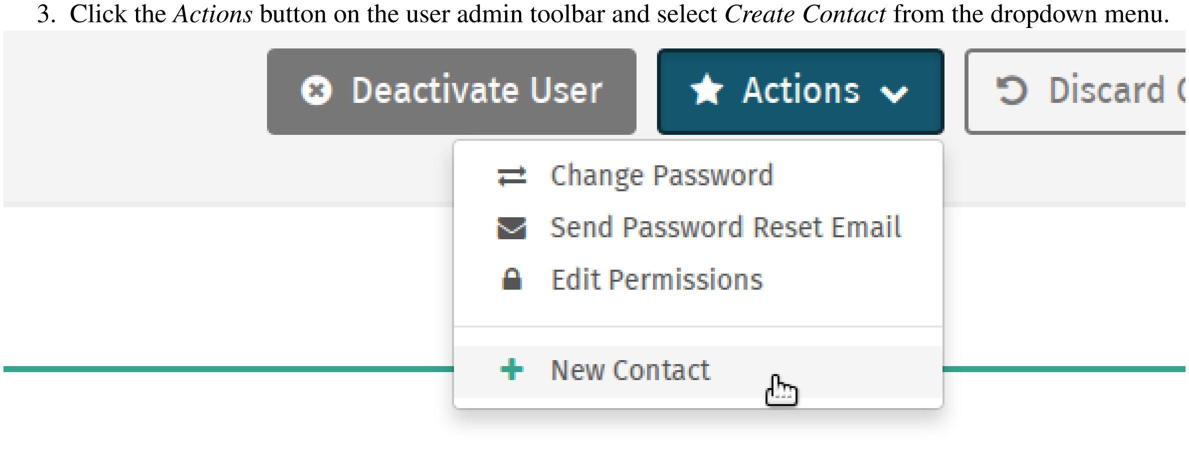
1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.



2. Select the user whose permissions you want to edit.



3. Click the *Actions* button on the user admin toolbar and select *Create Contact* from the dropdown menu.



4. Fill in the user's contact information, including any required fields, then save to create a saved contact for the user.

5. The contact will now be created and you will be taken to the new contact's admin page.

   Click the user's username to go back to the user's admin page.

10.3.5 Deactivating a Contact

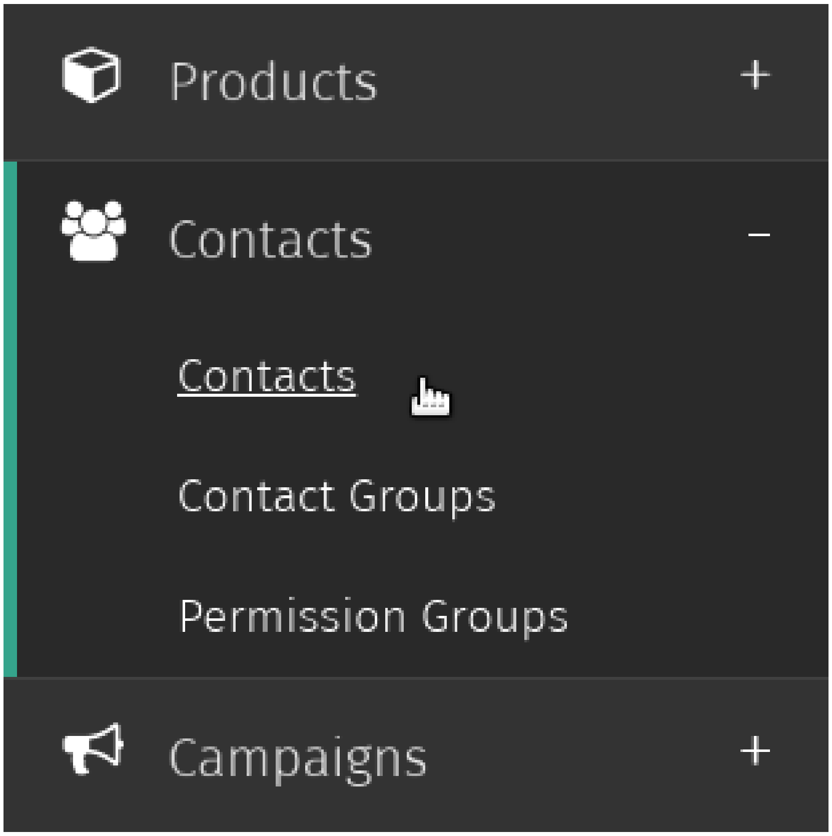
When contacts are deactivated, they remain in your system however they will no longer be able to log in to their account and by default are not displayed when first opening the Contacts admin page.

Note: If a contact has an associated user, deactivating the user's contact will not deactivate their user account, although it will prevent them from logging in, essentially accomplishing the same thing.

See *Deactivating a User* for more information.

To deactivate a contact:

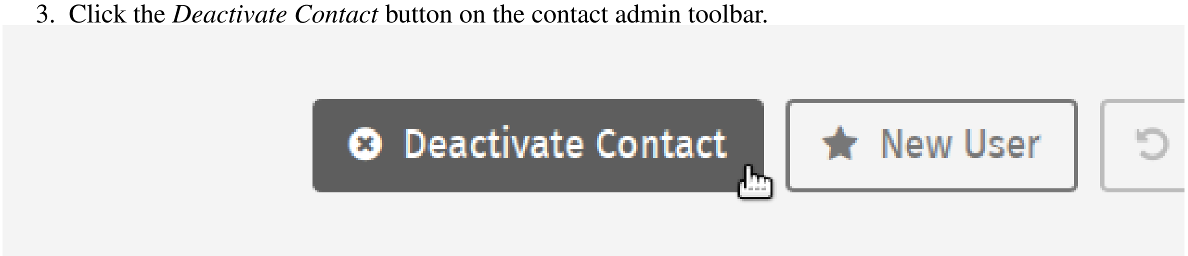
1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



2. Select the contact you want to deactivate.

Name	Type	Email	Phone
Filter by Name		Filter by Email	Filter by Phone
	Person	admin@shoop.local	
Émilie Dupuy	Person	lemonnier.lucie@noos.fr	0405929976
Stiina Vitikka	Person	kauno24@koistinen.org	+358 41 5068045
Véronique Morin	Person	fguibert@boyer.com	01 07 50 86 70
Mats Ekman	Person	phelgesson@malmqvist.se	08-730 508 11
Kjell Lunde	Person	faasen@eliassenamundsen.net	39010768

3. Click the *Deactivate Contact* button on the contact admin toolbar.



4. The contact will now be deactivated, and the *Deactivate Contact* button will be replaced with an *Activate Contact* button.

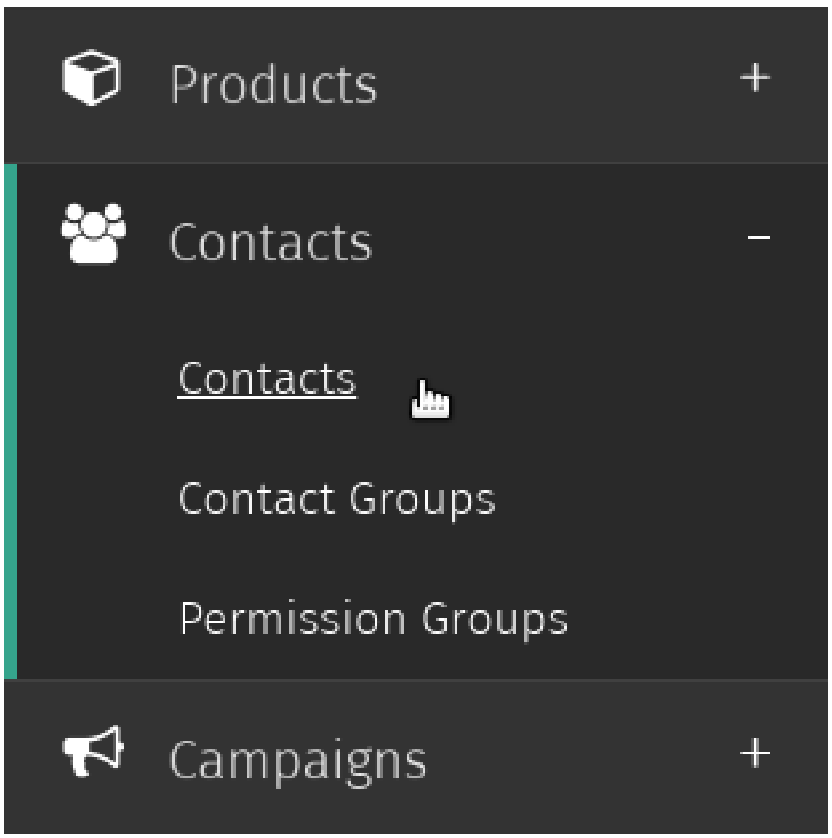
Note: The same steps can be followed to activate a deactivated contact.

10.4 Contact Groups

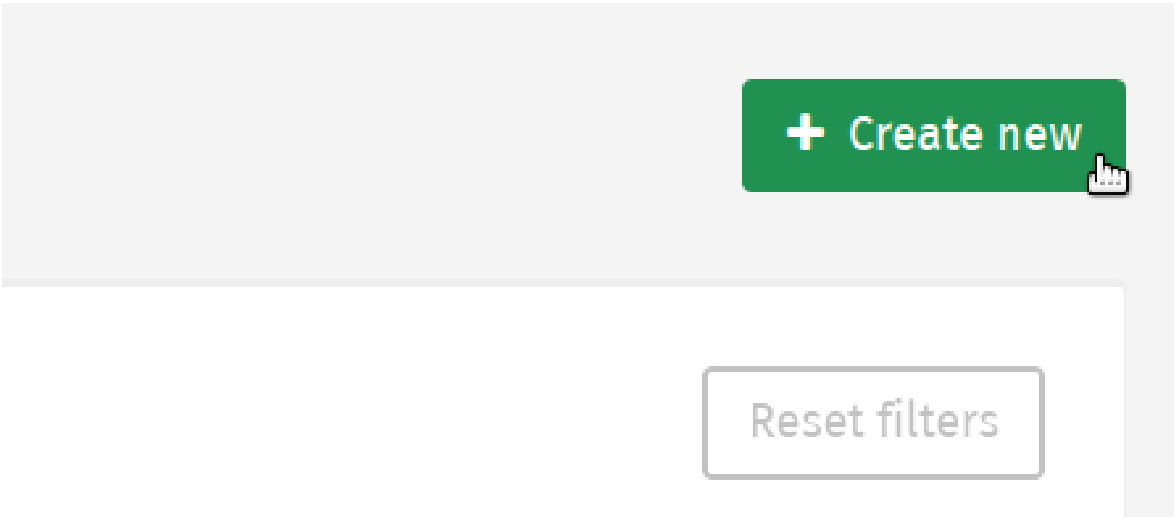
In Shuup, contacts can be placed into different contact groups. These groups can then be targetted for campaigns, discount pricing, or custom behaviors.

10.4.1 Creating a Contact Group

1. Navigate to the Contact Groups admin page by clicking *Contact Groups* under the *Contacts* category from the Shuup Admin menu.



2. Click the *Create new* button in the Contact Groups toolbar.



3. Select a name for your contact group.
4. Click the *Save* button to save your contact group.

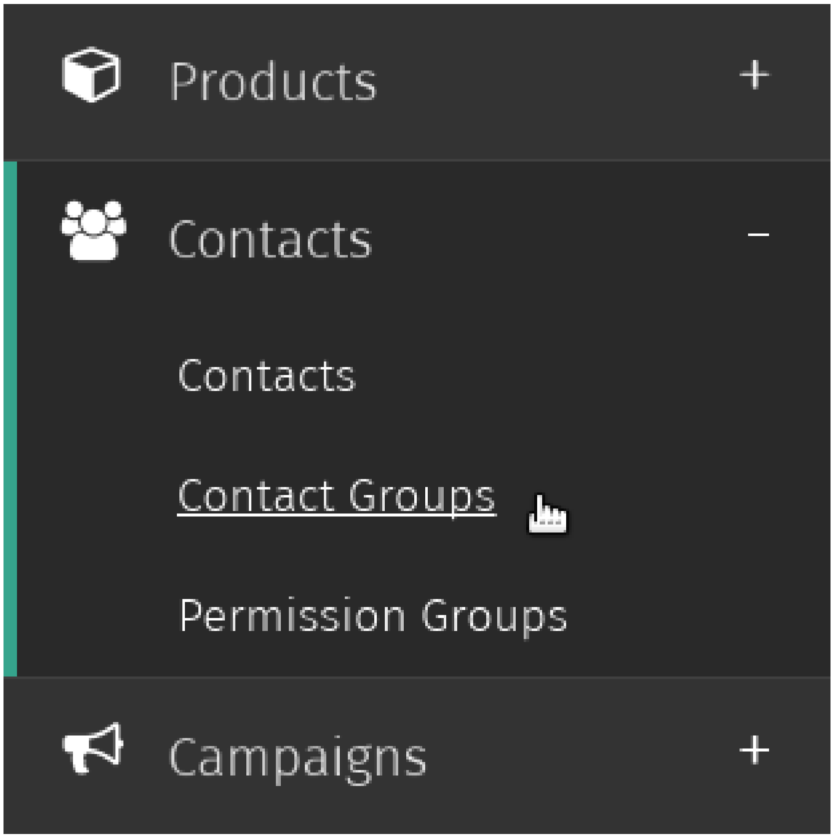
   Once the contact group has been saved, two new tabs will be automatically added to the group's admin page–a *Members* tab and one or more *Sales Range* tabs.

10.4.2 Editing Group Membership

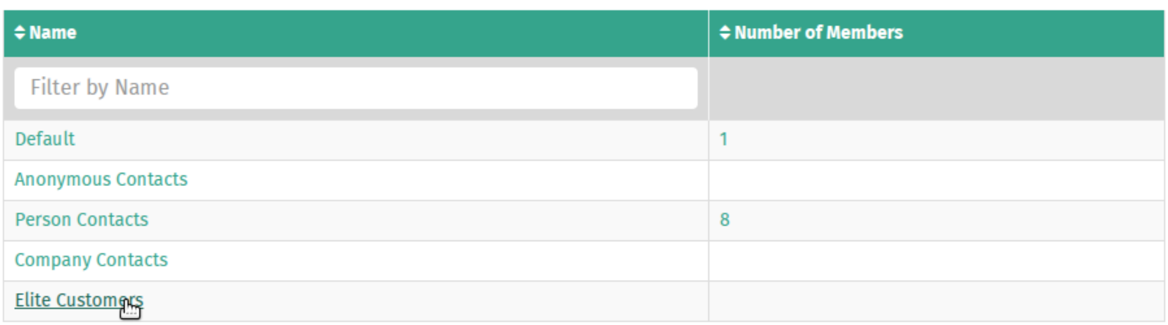
View Contact Group Membership

Adding a Contact

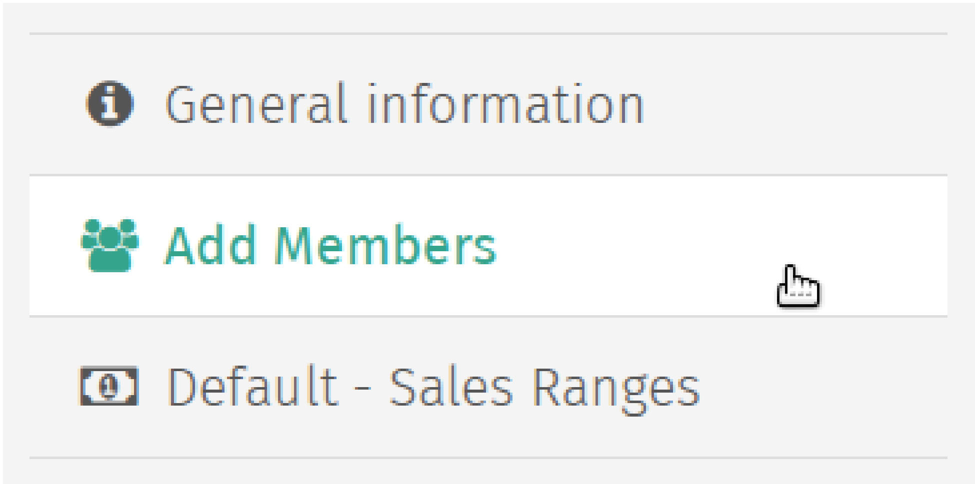
1. Navigate to the Contact Groups admin page by clicking *Contact Groups* under the *Contacts* category from the Shuup Admin menu.



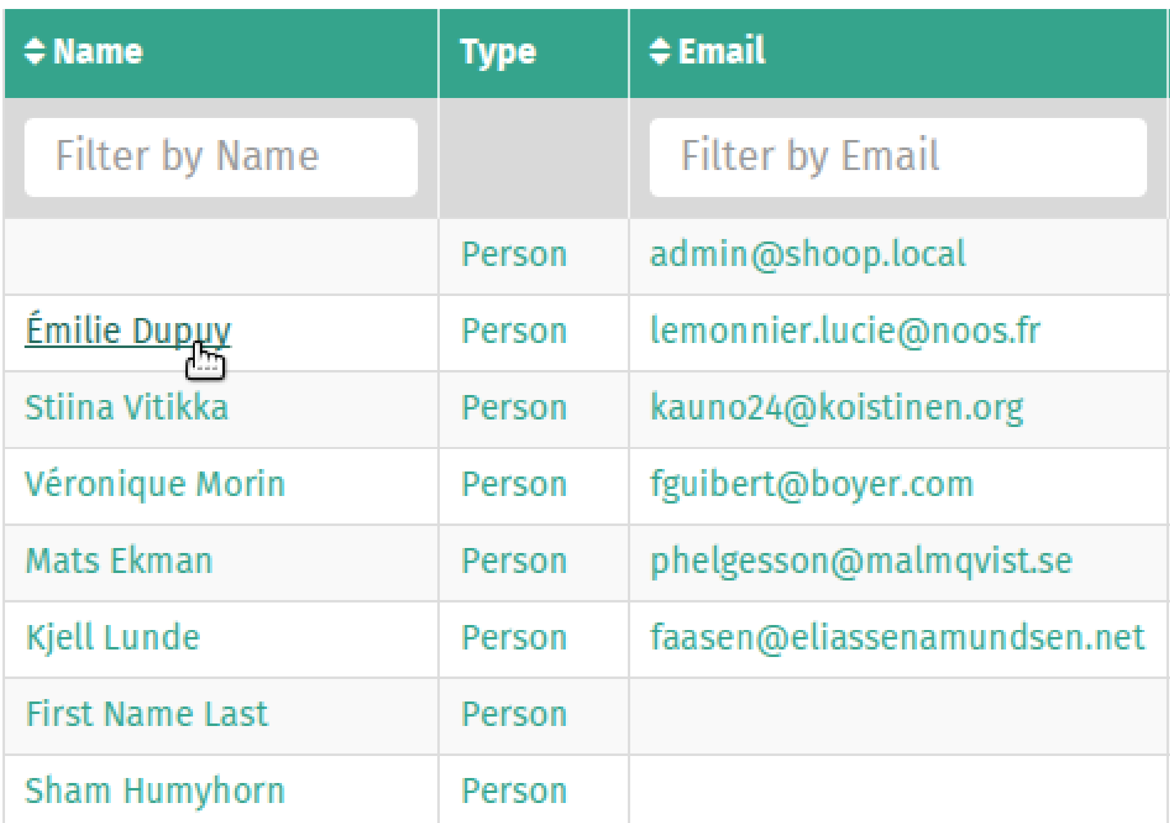
2. Select the contact group whose membership you want to edit.



3. Click the *Add Members* tab on the left-hand side of the screen.



4. Click the *Select Contact* button on an empty row to launch the Contact selector popup.
5. Select the contact you want to add from the Contact popup selector.

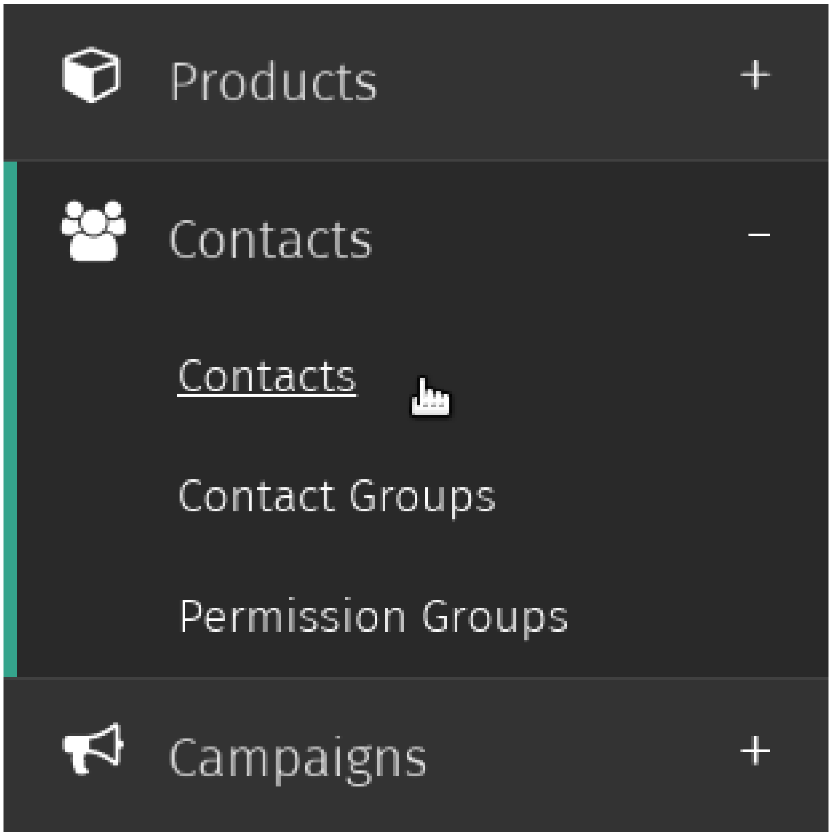


5. If there are no blank contact rows, click the *Add more* button to add a blank contact row.
6. Repeat as necessary to add more contacts, then click *Save* to save the contact group.

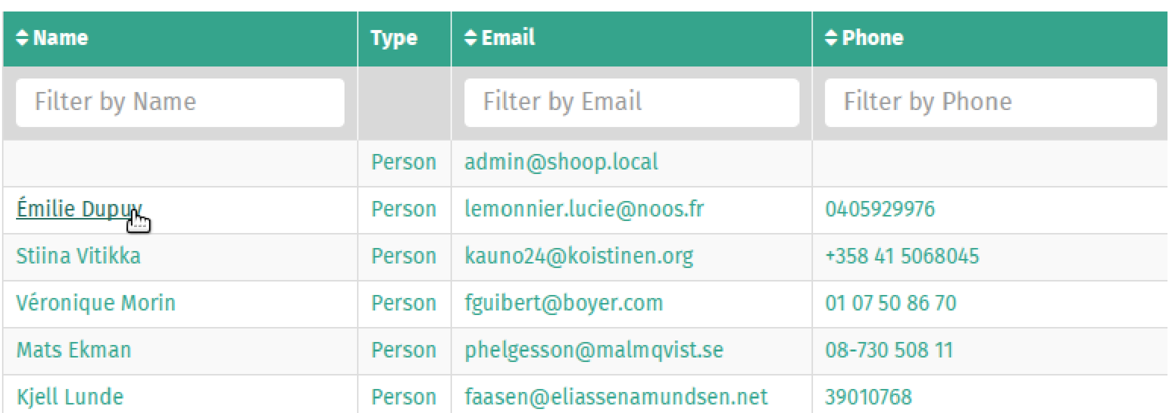
Removing a Contact

Note: Contacts can only be removed from a contact group via the admin page for each contact you wish to remove.

1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



2. Select the contact that you want to remove from your group.



Name	Type	Email	Phone
Filter by Name		Filter by Email	Filter by Phone
	Person	admin@shoop.local	
Émilie Dupuy	Person	lemonnier.lucie@noos.fr	0405929976
Stiina Vitikka	Person	kauno24@koistinen.org	+358 41 5068045
Véronique Morin	Person	fguibert@boyer.com	01 07 50 86 70
Mats Ekman	Person	phelgesson@malmqvist.se	08-730 508 11
Kjell Lunde	Person	faasen@eliassenamundsen.net	39010768

3. Click the *Edit* button in the contact admin toolbar.

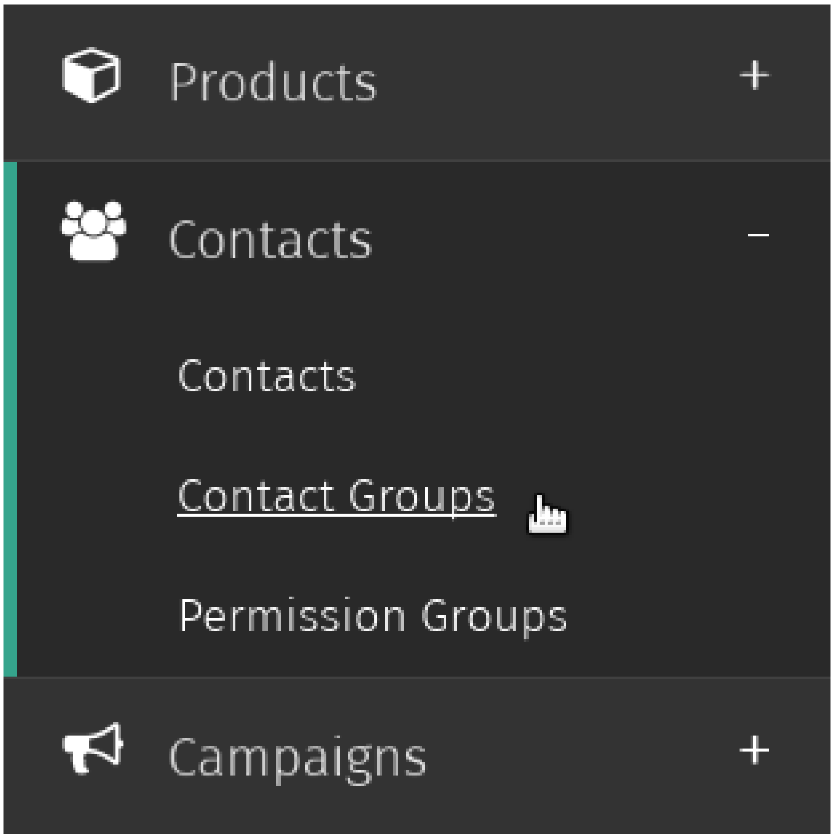
4. Find the contact group whose membership you wish to edit in the *Contact Groups* list, click the *x* button on the contact group, and click *Save* to update the contact's group membership.

10.4.3 Creating a Sales Range

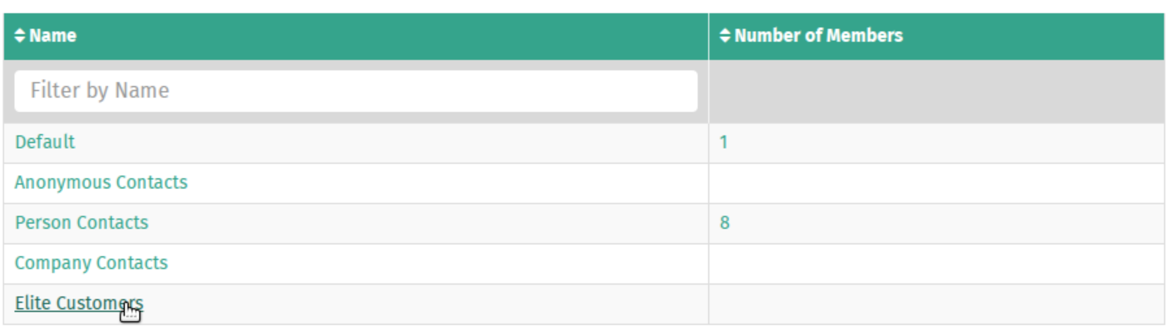
Contact group *sales ranges* can be used to automatically assign customer contacts to contact groups based on their sales totals.

This can be useful if you want to target different sales levels for special campaigns or offer special discounts or promotions.

1. Navigate to the Contact Groups admin page by clicking *Contact Groups* under the *Contacts* category from the Shuup Admin menu.

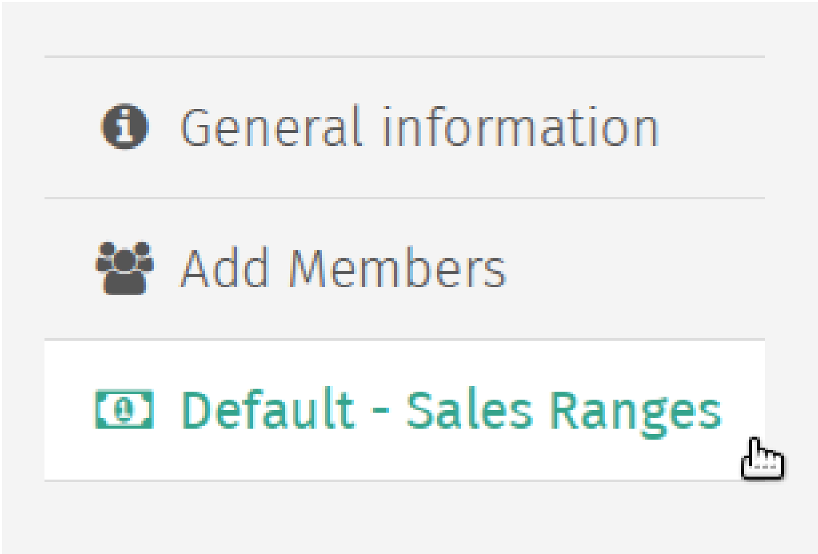


2. Select the contact group to which you want to add a sales range.

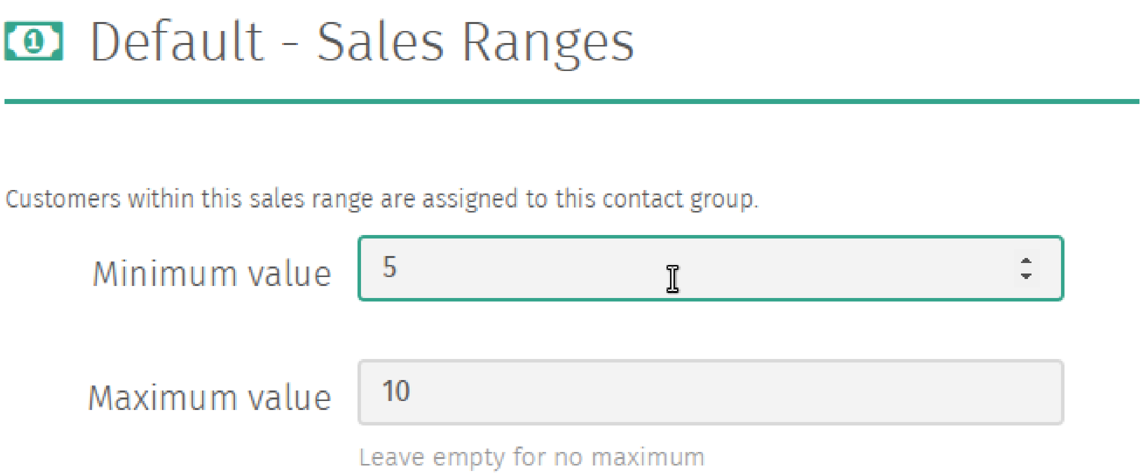


Name	Number of Members
Filter by Name	
Default	1
Anonymous Contacts	
Person Contacts	8
Company Contacts	
Elite Customers	

3. Click the *(Shop Name) - Sales Ranges* tab on the left-hand side of the screen, where *(Shop Name)* is the name of the shop to associate with the sales range.



4. Enter a minimum and maximum value for the group's sales range.



Note: Leave the maximum value blank to set no maximum for the group.

Set the minimum value to 0 to set no minimum for the group.

5. Click *Save* to save the contact group sales range. Contact group membership will automatically update based on customers' sales totals.

Tip: Try creating a contact group for customers within a sales range value and target them for special discounts and promotions.

CHAPTER 11

Notifications

11.1 Concept

Shuup has a notification system that allow users to handle *events* triggered by the platform and execute *actions* for that when a set of configured conditions are met. It can be translated into this phrase: Do an *action* when an *event* is triggered if a *condition* is met. (e.g.: Send an email to the customer when received a new order if the user has a valid email).

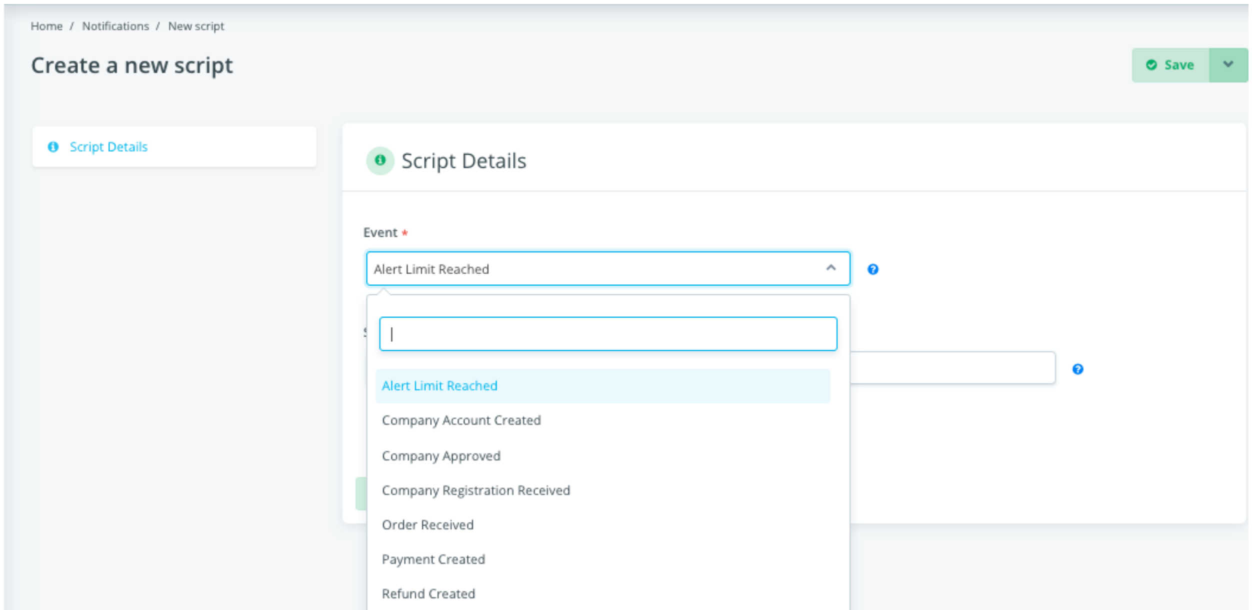
Events could include:

- Orders being created
- Shipments being dispatched
- Vendors requesting registration
- Many others

Notifications may be delivered over different channels, such as email. As delivery channels are also pluggable (which requires developed addons that handles the channel), notifications are basically the *Actions* that will be executed by the platform.

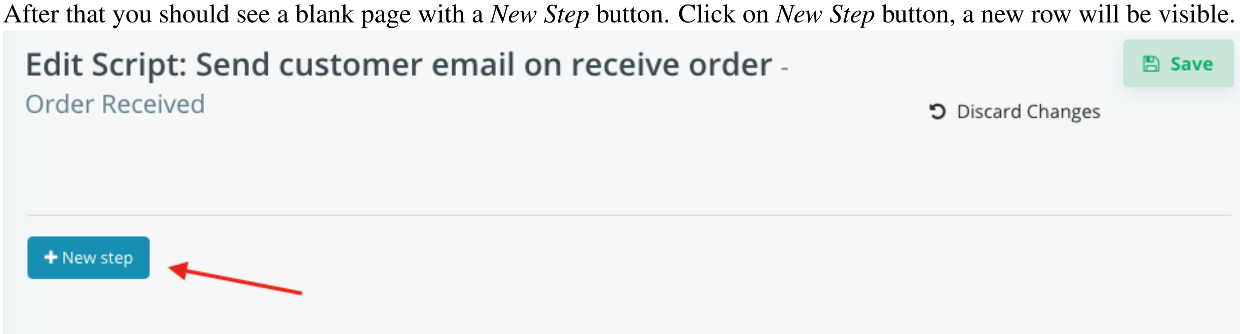
11.2 Configuring Notifications

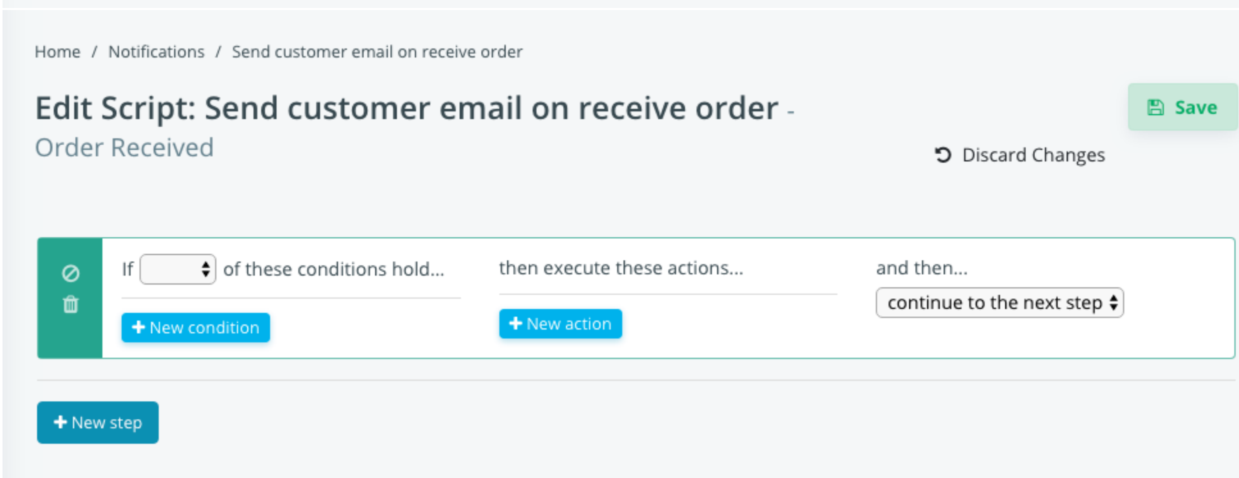
To handle a notification, go to *Settings* > *Notifications*. Click on *New Script*.



Select the event you want to handle and give it a name to describe what it is doing, like *Send customer email on receive order* and make sure *Enabled* checkbox is checked. Click *OK*.

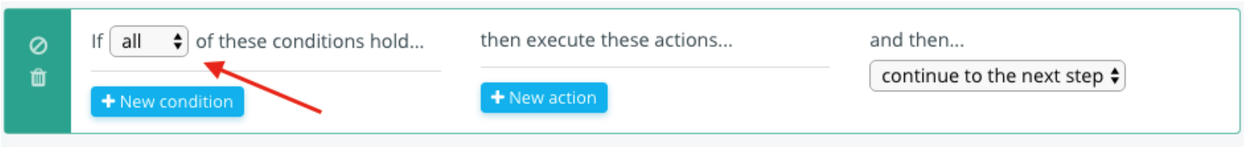
After that you should see a blank page with a *New Step* button. Click on *New Step* button, a new row will be visible.



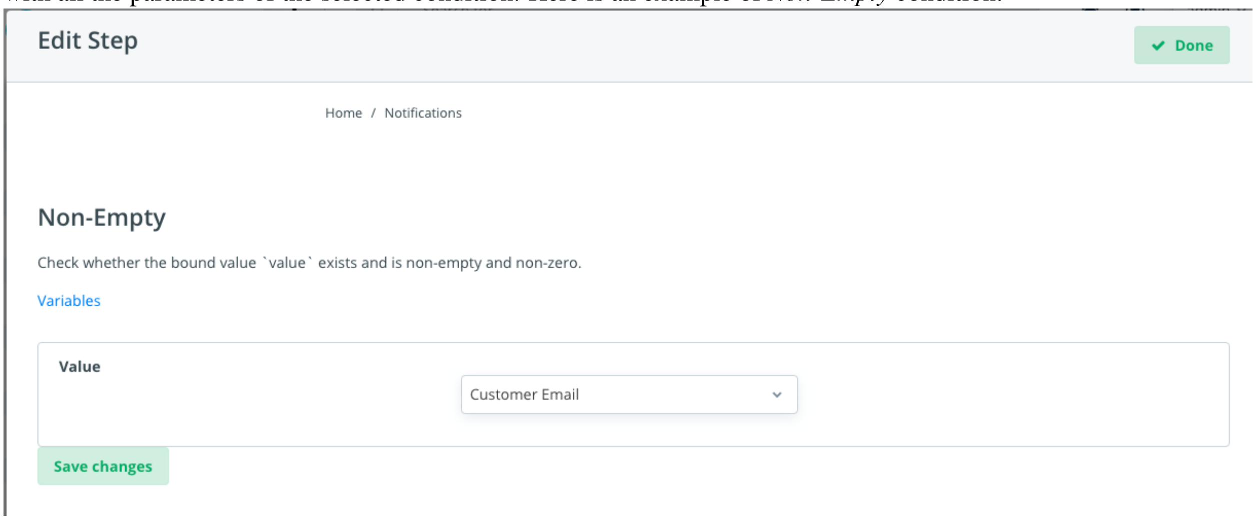


The script can have as many steps as you want, you can remove steps and also disable them. You can add conditions to each step to be executed, like checking whether the customer has a valid phone or email before actually sending the email/SMS.

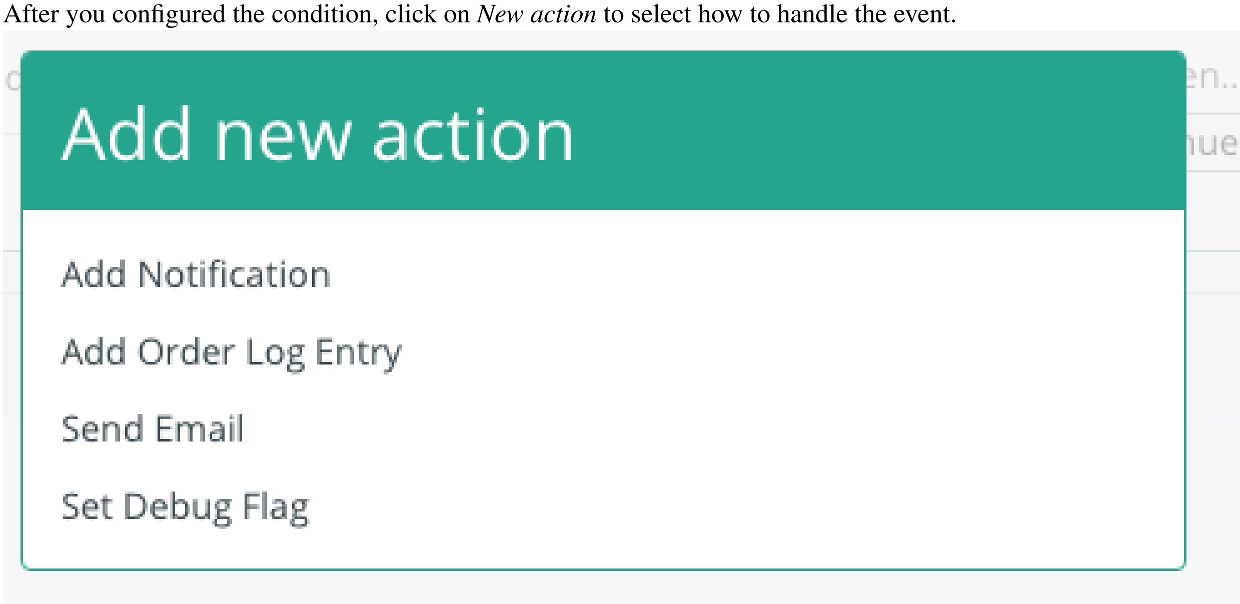
Select the *All* operation next to the *New condition* button if you don't want to add any condition (this will make sure the script will run every time).



To add a new condition, click on *New condition* button and select the desired one. A form will appear to be configured with all the parameters of the selected condition. Here is an example of *Non-Empty* condition:

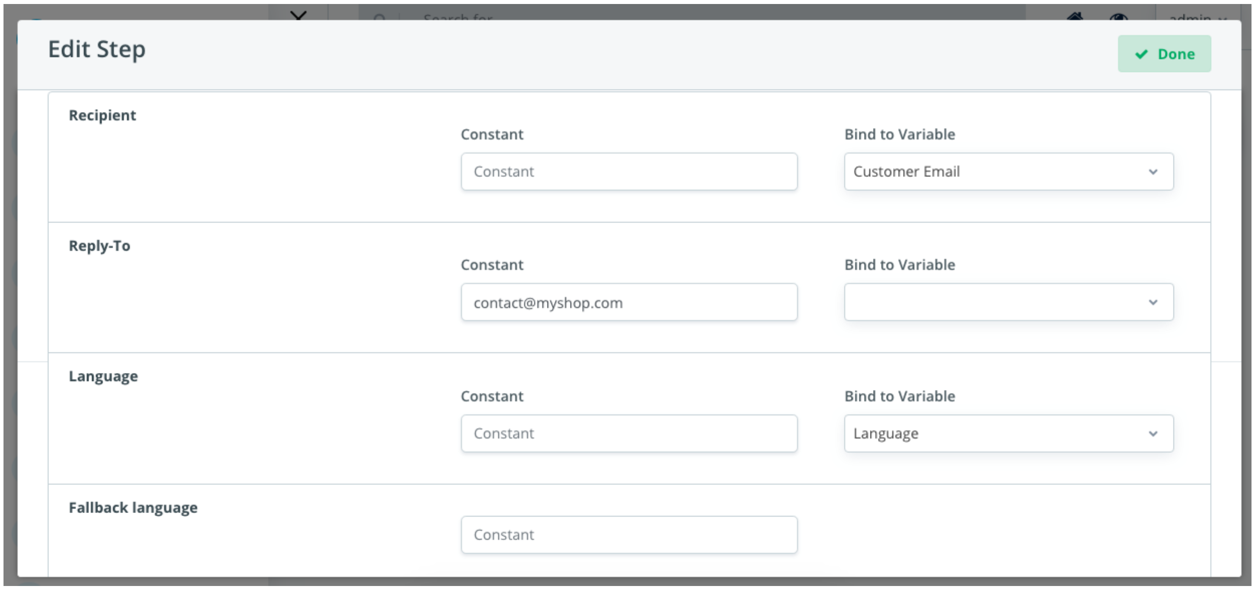


After you configured the condition, click on *New action* to select how to handle the event.

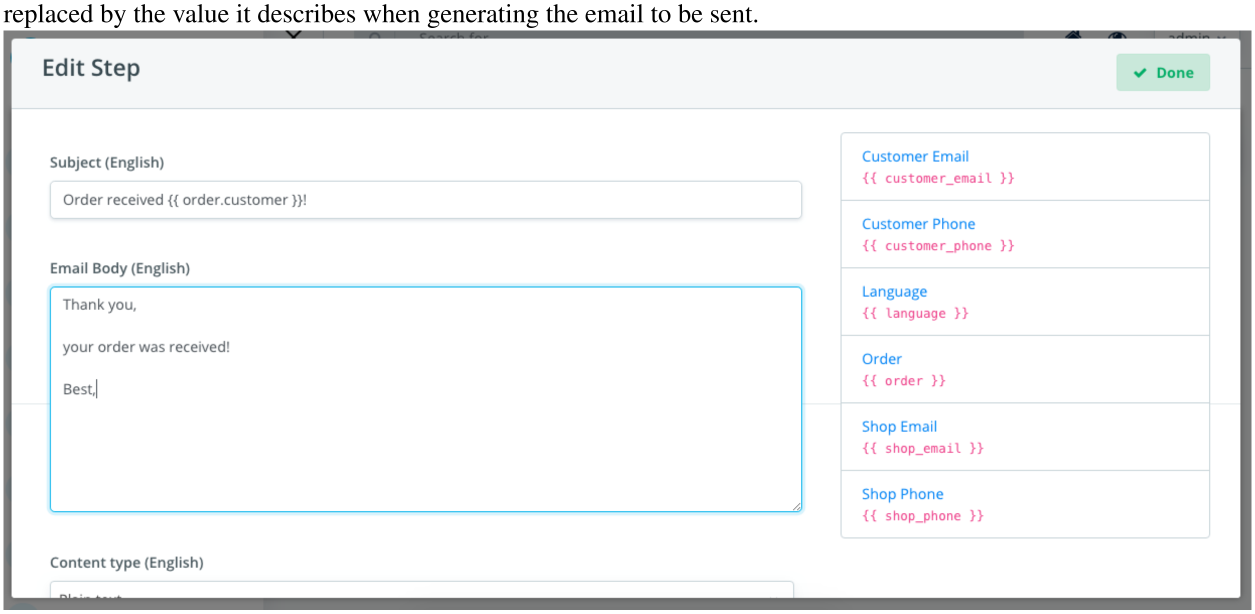


Select the action type (like Send email). A new form will be rendered to fill all the parameters of the selected action.

In Send Email action, you need to fill the Recipient and the Language of the email to be sent (and other optional fields). As you may ask yourself, how can I know the email of the customer in cases you want to send an email when customer places an order? In these cases, the event will provide "variables" that can be bound to the action parameters. In the *Order Received* event, for example, it provides a *Customer Email* variable you can use in the *Recipient*, so it will use the email that customer entered when placing the order. Each event can provide a different set of variables that can be used in the script.



Some actions may request text contents as parameters. This is the case of Send Email event which requires the merchant to fill the email subject and email body to send to the configured recipient. To configure the email template, click on the language tab and fill the subject and body fields of the email. You may notice a list of variables on the right side. Those strings are special words (variables) that can be used in the email subject or body and they will be replaced by the value it describes when generating the email to be sent.



Make sure to save the email parameters by clicking on *Save Changes* button and then click on *Done* button. Save the entire script by clicking *Save* and the notification is completely configured.

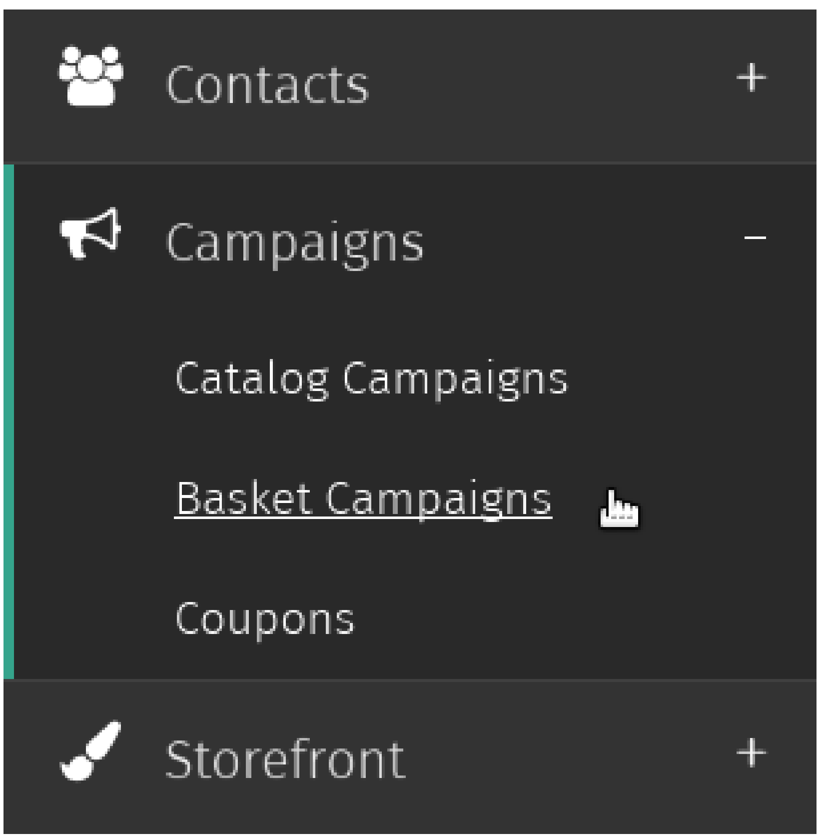
CHAPTER 12

Campaigns

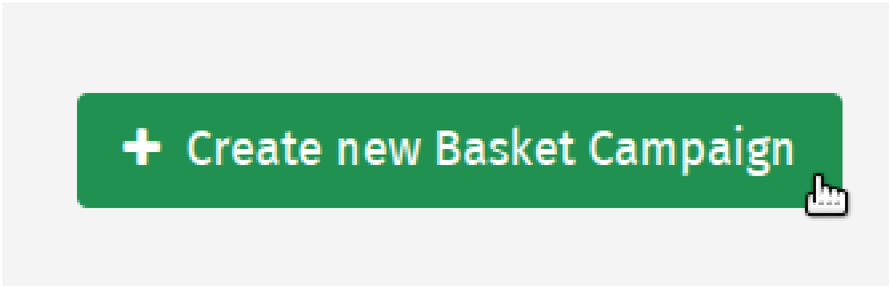
Shuup e-commerce platform comes built in with customized and easily extendable campaign management system. Shuup's modular campaign management structure allows extending the feature to most innovative campaign models and even integrations.

12.1 Creating a Campaign

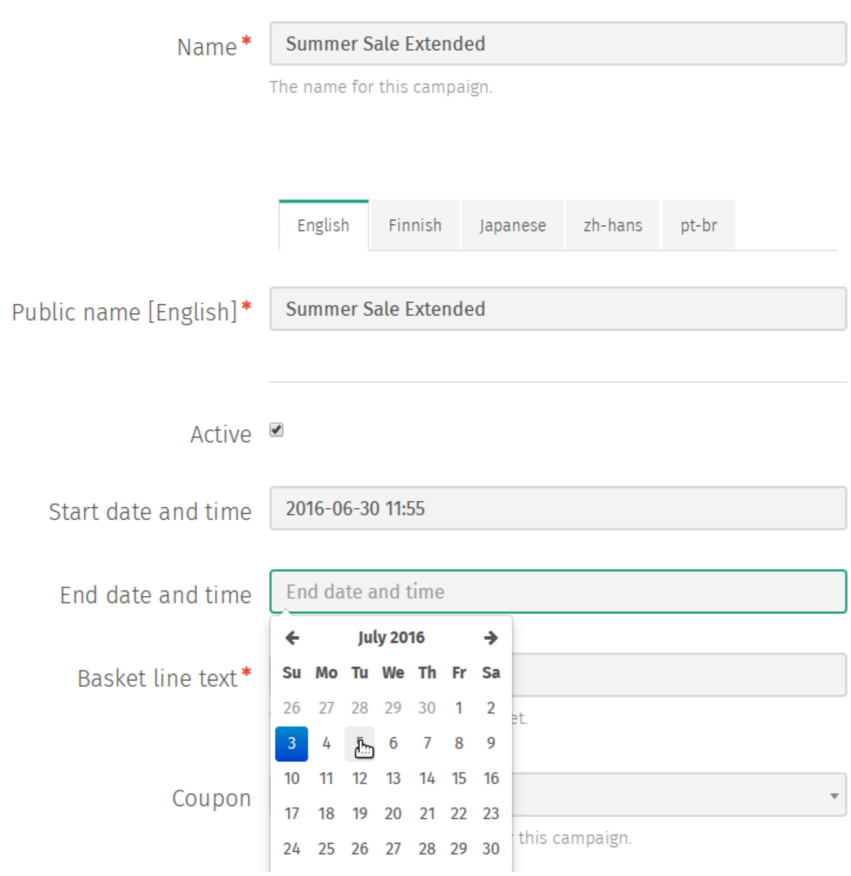
1. Navigate to the *Basket Campaigns* admin page by clicking *Basket Campaigns* under the *Campaigns* category from the Shuup Admin menu.



2. Click the *Create a new Basket Campaign* button in the admin page toolbar.



3. Enter general information regarding the campaign, such as the name, public name, basket line text, start/end dates, and any coupons to be associated with the campaign.



Field	Use	Mandatory
Name	Name of the campaign (not visible on the shop front-end)	Yes
Public name	Public name of the campaign to be presented in the shop front-end, when the campaign name is displayed	Yes
Shop	Shop selector for multi-shop setup. Shop where the campaign is active	Yes
Start date and time	Setting start date for the campaign using date picker	No
End date and time	Setting end date for the campaign using date picker	No

Note: If no start date is provided, it will take effect immediately.

If no campaign end date is provided, the campaign will stay in effect indefinitely.

4. Click *Save* to create the campaign. Once a campaign has been saved, rules and effects can be added to define its behavior.

Tip: Try setting up a cross-selling basket campaign by offering a discount on one product when a customer purchases a related product.

12.2 Rules and Effects

Whether or not a campaign be applied to a particular order and how it will be applied depends on its *Rules* and *Effects*.

Rules The conditions or criteria that an order must meet before a campaign will be applied. Different rules will be available depending on whether they are being applied to a basket campaign or a catalog campaign.

Effects If a customer's order meets the requirements of all of the campaign's rules, any enabled effects will be applied to their order. These are usually discounts applied to the order, such as discounts on the total basket value, discounted or free quantities of a particular product, or other various types of discounts.

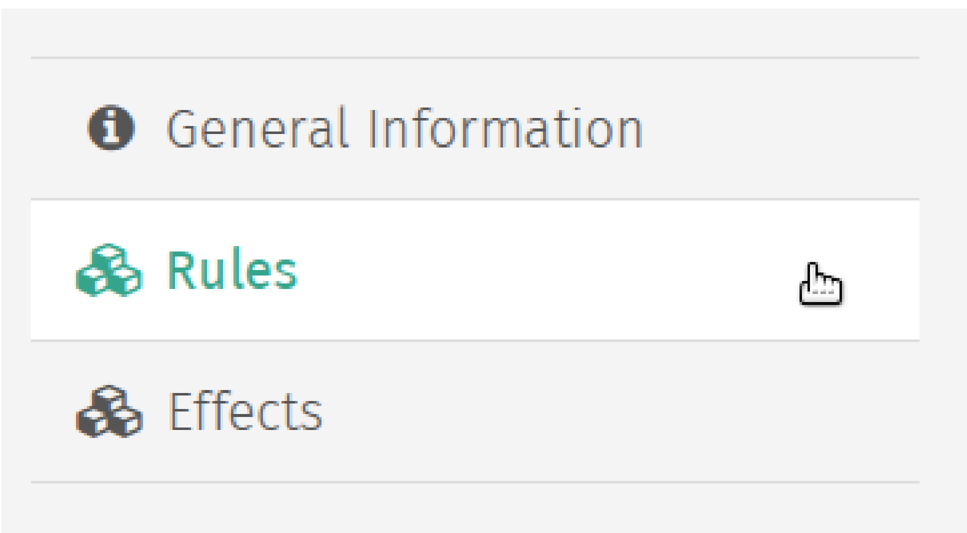
Coupons Used to limit usage of a basket campaign to only holders of a valid coupon code.

12.2.1 Adding Rules and Effects

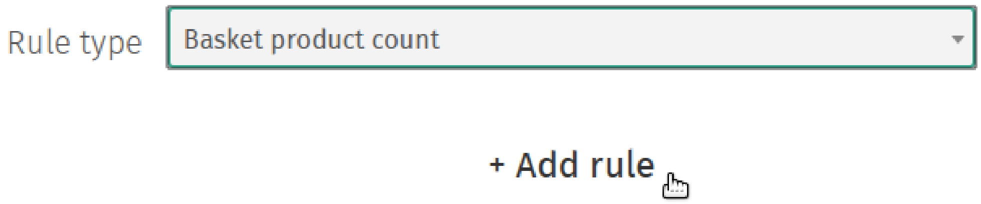
Once a campaign has been created, Rules and Effects can be added from the campaign's admin page.

To add rules and effects:

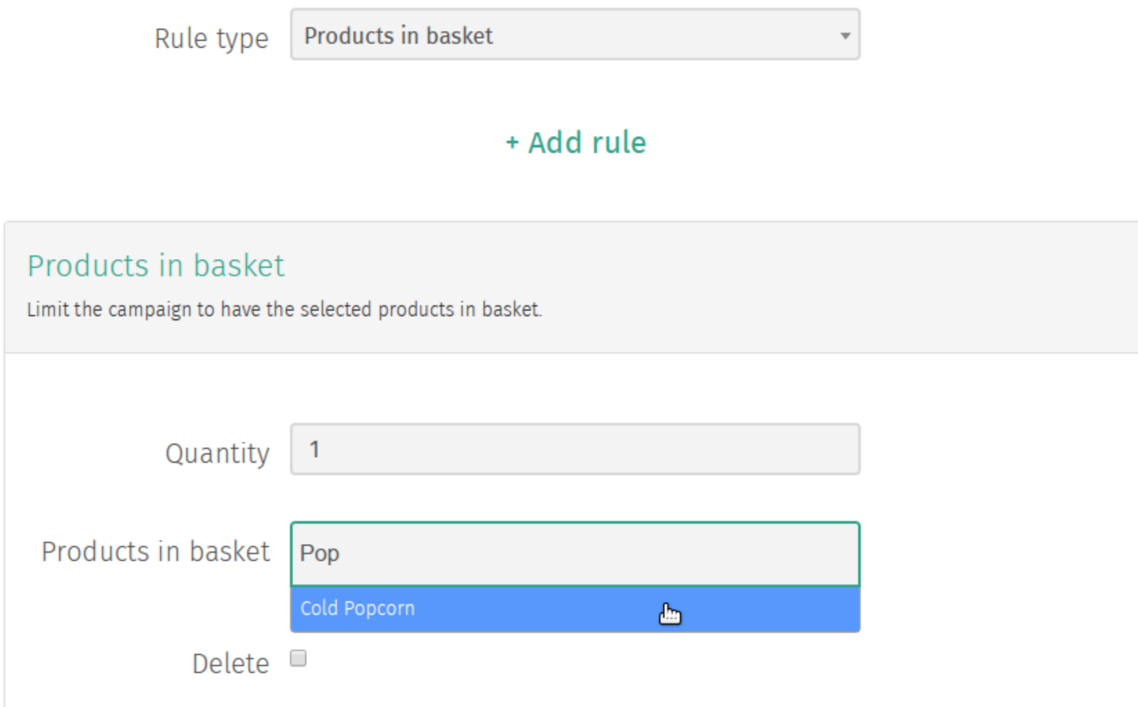
1. Click the *Rules* or *Effects* tab on the left-hand side of the screen.



2. Select the rule or effect type from the dropdown menu and click the *Add rule* or *Add effect* button below to add a new rule or effect form.



3. Enter any required values in the rule or effect form, and click *Save* to attach the rules or effects to the campaign.



12.2.2 Rules

The following rules are available to campaigns:

Basket product count Limit to baskets containing at least the specific number of products

Basket maximum product count Limit to baskets containing at most the specific number of products

Basket total value Limit to baskets containing at least the specified total amount

Undiscounted basket total value Limit the campaign to match when it has at least the total value entered here worth of products which doesn't already have discounts

Basket maximum total value Limit to baskets containing at most the specified total amount

Products in basket Limit to baskets containing a certain quantity of the selected product(s)

> **Note:** This rule applies if a basket contains *any* of the selected products (i.e., a certain amount of product A *or* a certain amount of product B).
>
> In order to require product A *and* product B, create a separate rule for product A and product B.

Contact Group Limit to customers belonging to a specific contact group

Contact Limit to selected customer contacts

Category products in basket Limit the campaign to match the products from selected categories

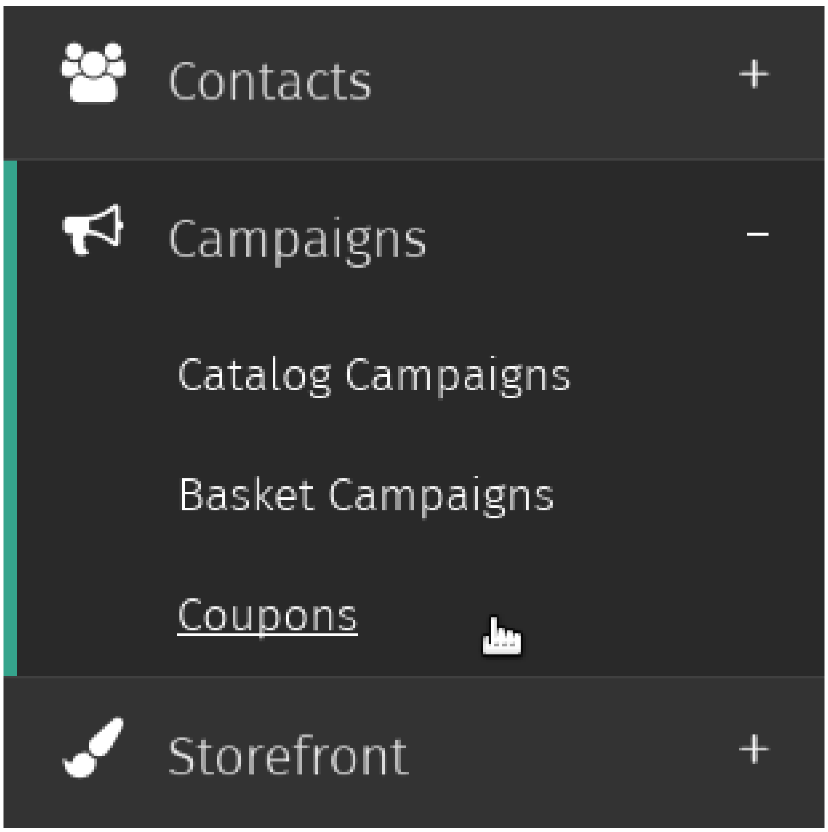
Day and hour Limit the campaign to selected days

12.2.3 Basket Effects

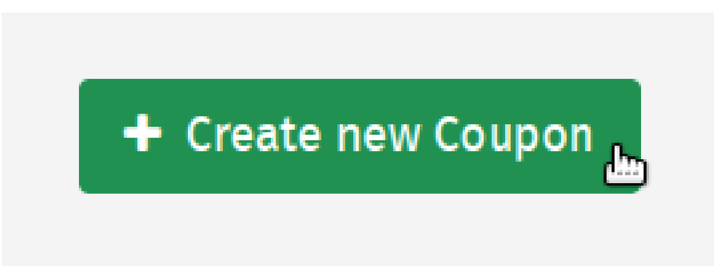
12.2.4 Campaign Effects

12.3 Creating a Coupon Code

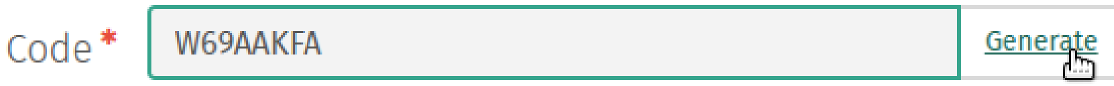
1. Navigate to the *Coupons* admin page by clicking *Coupons* under the *Campaigns* category from the Shuup Admin menu.



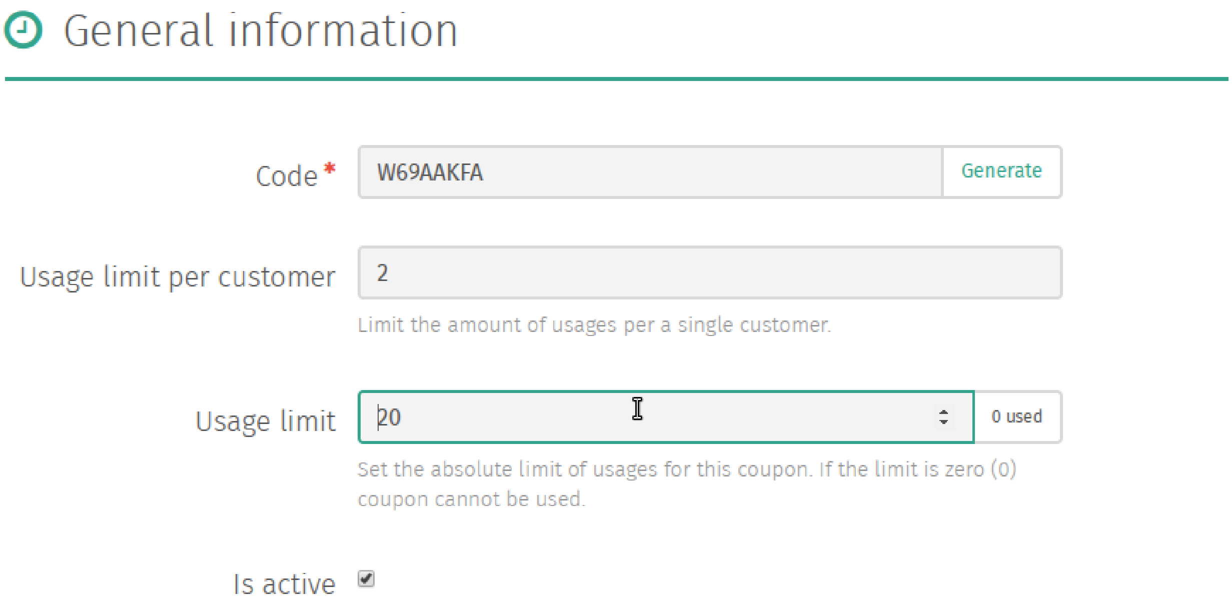
2. Click *Create new Coupon* button in the admin page toolbar.



3. Either type the desired coupon code you want your customers to enter or click the *Generate* button to randomly generate a coupon code.



4. Enter general information regarding the coupon, such as the usage limit per customer and the over usage limit (or total number of redeemable coupon codes).



Tip: As coupon codes are redeemed through the store, the total number of used coupon codes will be visible through the coupon's admin page.

CHAPTER 13

Carts

When a customer adds a product to their cart, the system created a cart object which is visible from the admin menu by navigating to *Orders > Carts*.

There you can see a table rendering all the carts ever made by customers. It contains data like the date and time it was created and updated, whether or not it was abandoned, the shop and the product count.

The filter button on the top right corner allows you to filter out carts according to each table column.

13.1 Update the Cart Inactivity Delay

By default, carts will not be rendered in the table unless they have been inactive for the past 2 hours. It is possible to change the delay of inactivity before the cart is rendered in the Carts table.

1. Navigate to the *Shops* menu by clicking *Shops* in the *Shops* category.
2. Click on the shop for which you want to add a delay.
3. Click the *Cart Inactivity Delay* tab on the left-hand side of the screen.
4. Input the number of hours the cart has to be inactive for before being added to the Carts table. If the number is 0, the carts will be rendered immediately.
5. Click *Save*.

CHAPTER 14

Indices and tables

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