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# Shuup Guide Documentation

*Release 0.0*

**Shoop Ltd.**

Aug 20, 2016



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## Using the Shuup Admin

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### 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.





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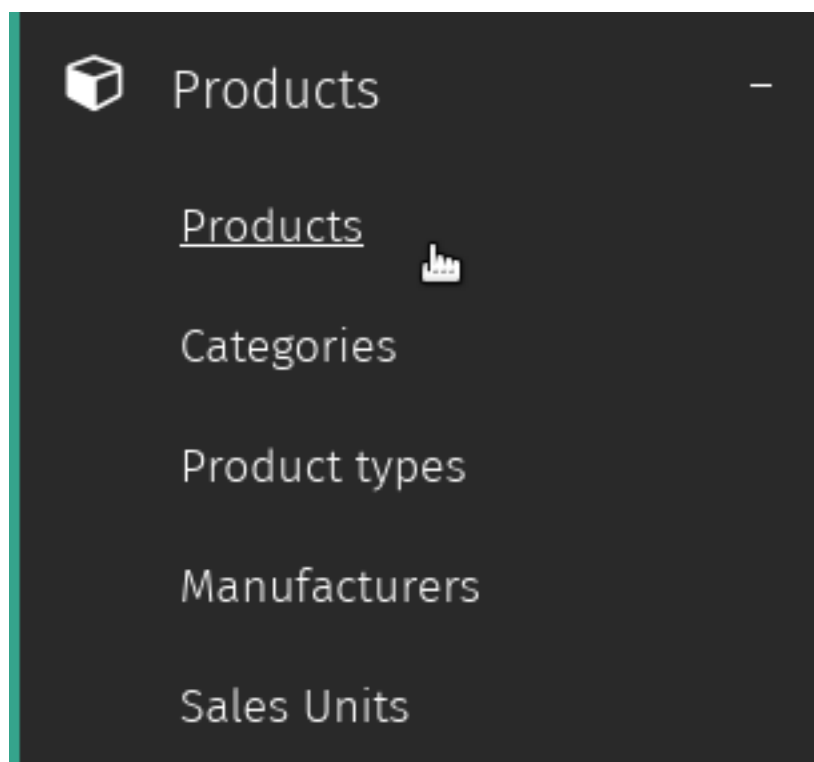
## Products

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### 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.

The screenshot shows the Shoop Admin interface. At the top is a dark header with a menu icon, the 'SHOOP' logo, a search bar, and icons for a shopping cart and settings. Below the header, the breadcrumb 'Home / Products' is visible. The main heading is 'Products', with a '+ New product' button on the right. Below this, there's a filter section with 'Items per page' set to 20, 'Showing 20 of 3371 products', and a 'Reset filters' button. A table lists products with columns: SKU, Name, Type, Mode, and Primary Category. The table has filter inputs for SKU and Name, and a dropdown for Mode. The visible rows are:

SKU	Name	Type	Mode	Primary Category
Z56DS2	Nail Kit	default	normal	Eyelashes
Z4UR9D	Nail Polish Golden Opportunity 80893	default	normal	Nails
Z3ZPTE	Nail Art Paint	default	normal	Nails

## 2.1.1 New Product Form

The screenshot shows the 'New product' form in the Shoop Admin interface. The header is similar to the previous page, but the breadcrumb is 'Home / Products / New product'. The main heading is 'New product', with a 'Save' button on the right. On the left is a sidebar with tabs for different sections: General Information (selected), Additional Details, Accounting, Physical Properties, Manufacturer, Default - Visibility, Default - Purchasing, Default - Shipping & Payment, Product Media, and Product Images. The 'General Information' section contains the following fields:

- Product type \* (Dropdown menu, currently set to 'Default Product Type')
- SKU \* (Text input field, currently containing 'SKU')
- Language selection (Buttons for English, Finnish, Japanese, zh-hans, and pt-br; 'English' is selected)
- Name [English] \* (Text input field, currently containing 'Name [English]')
- Description [English] (Text input field, currently containing 'Description [English]')

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.

## Base Product Tabs

The top section of the form contains most of the basic product information and settings.

**General Information** General information about the product, including product type, name, and product description.

**Additional Details** Miscellaneous information regarding the product, such as the product's stock and shipping mode, barcode information, and relevant keywords.

**Accounting** Bookkeeping-related information.

**Physical Properties** Physical dimensions and unit information for the product.

**Manufacturer** Selection choice for the product's manufacturer.

## Shop-Specific Tabs

Following the base product section are the following shop-specific tabs. The names of these are preceded by the relevant shop's name (initially *Default*):

**Visibility** Front-end visibility settings for a specific shop.

**Purchasing** Pricing, supplier, and multiple-purchase settings.

**Shipping & Payment** Shipping and payment service-related settings (used to limit customer shipping and payment choices on checkout).

## Media Tabs

These sections are for managing the image and digital media content related to the product.

**Product Media** Product-related file uploader and selector.

**Product Images** Product image uploader and selector.

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**Tip:** Advanced Product Media settings can be configured to deliver digital and downloadable content.

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## Customer Group Pricing Tab

Pricing settings based on customer groups. If a customer belongs to multiple groups, they will be presented the lowest price of the groups to which they belong.

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

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## 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*.

## Stock Management Tab

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

## Orders Management 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. Select the *Attributes* 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 *Products* 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.

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

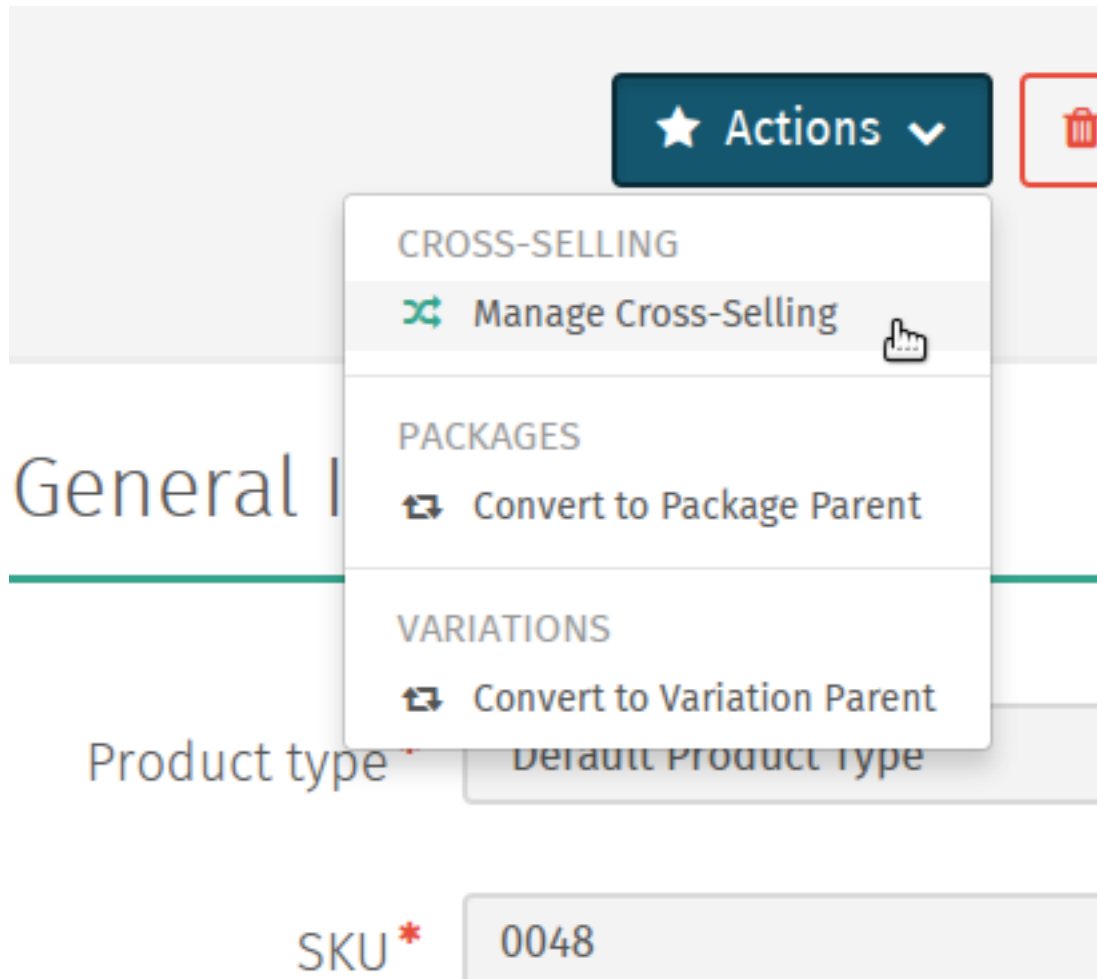
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## 2.4 Cross-Selling

### 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 Browse button and clicking on the desired product from the product list.

## Cross-sells

Cross-sell 1

Product

 Browse

Weight

Type

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.

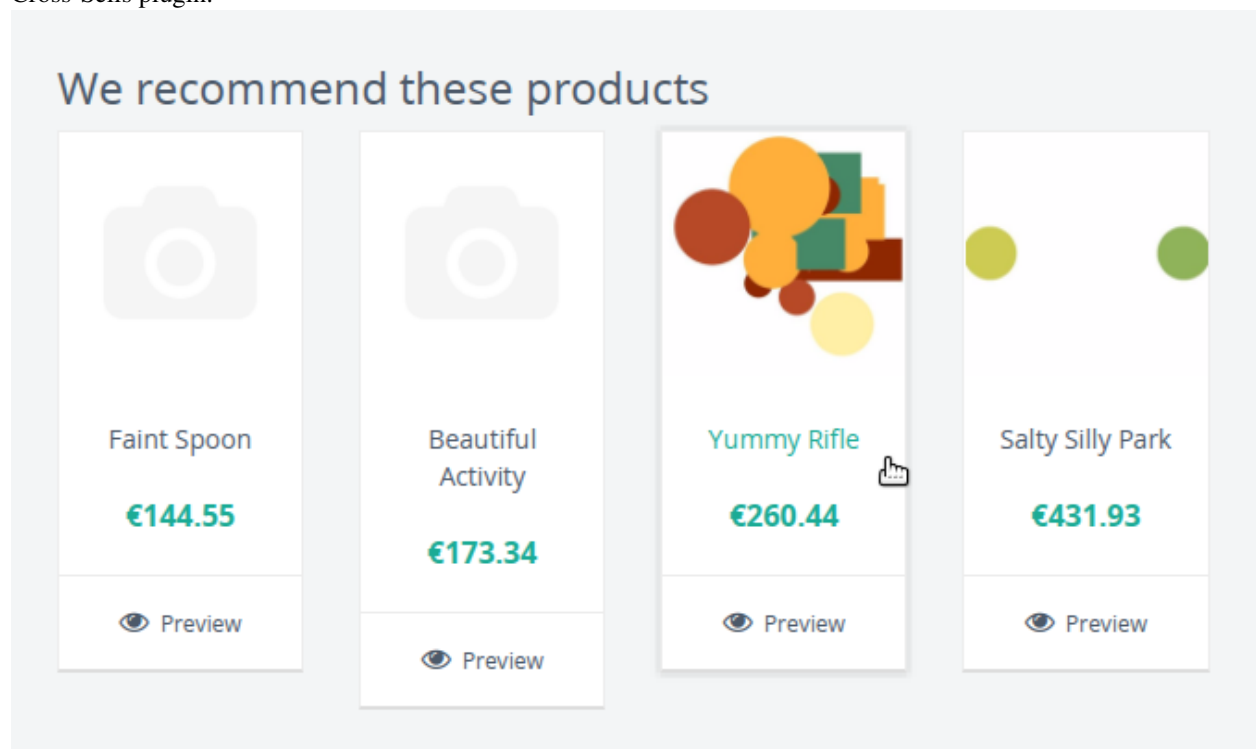
---

**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.

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### 2.4.2 Displaying Cross-Sells

Once defined in the Product admin, cross-sell relationships can be displayed on the store front using the Xtheme Cross-Sells 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 lower right-hand corner of the page.
4. Select one of the Xtheme 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 lower right-hand corner of the page
11. Your products should now appear in the placeholder on the product's page.

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**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.

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

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## 2.5 Package Products

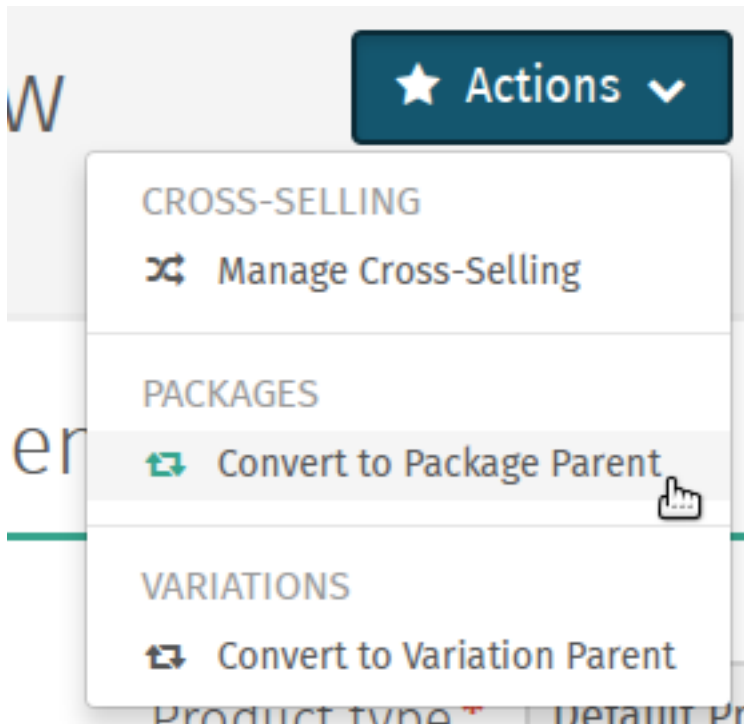
Package products are used to package a number of related products to be sold as a single product package.

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.

## Package Products

Product	Quantity
 <i>Razor</i>	<input type="text" value="10.000000000"/> <span>Remove <input type="checkbox"/></span>
 —	<input type="text"/>
 —	<input type="text"/>

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

## 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

Combination	Product	
Color: Fuschia, Size: Small	 Browse	Clear <span>Floral Dress - Fuschia (Small)</span>
Color: Magenta, Size: Small	 Browse	Clear <span>Floral Dress - Magenta (Small)</span>
Color: Pink, Size: Small	 Browse	Clear <span>—</span>
Color: Fuschia, Size: Medium	 Browse	Clear <span>—</span>
Color: Magenta, Size: Medium	 Browse	Clear <span>—</span>
Color: Pink, Size: Medium	 Browse	Clear <span>—</span>

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.

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## Using Themes

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### 3.1 Installing Themes

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

See [Addons](#) for general addon installation instructions.

### 3.2 Activating Themes

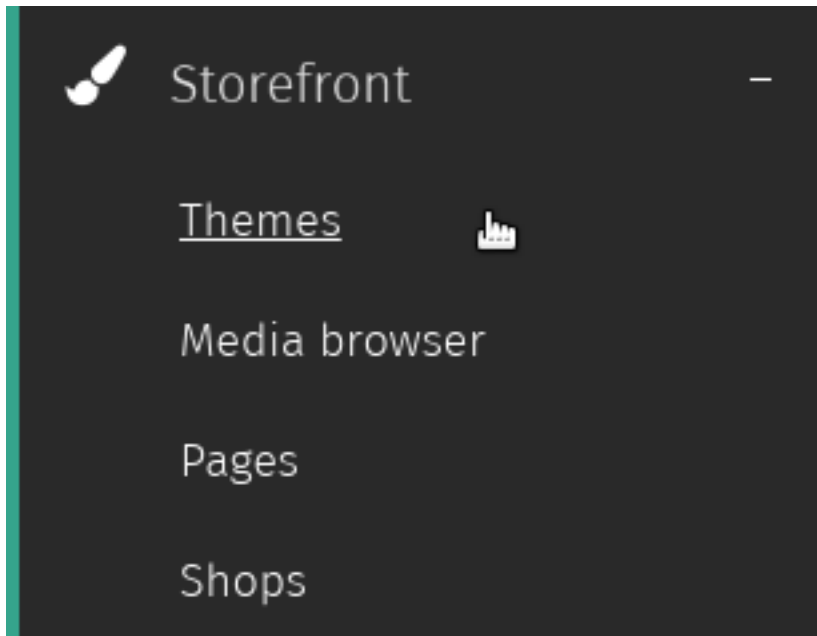
When a shop is first set up, visitors will see the following notice until a theme for the shop has been activated.

## Welcome to Default!

You are seeing this page because there is no theme selected for the default frontend.


[Log in to the administration interface](#) to choose a theme and set up your shop.

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



From here, themes can be activated or configured.

## Themes

 Theme Configuration

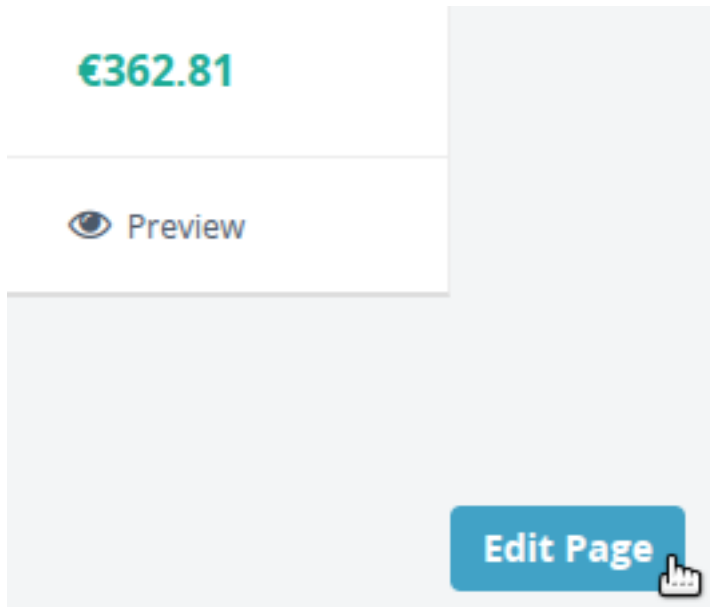
Theme	Actions
Shoop Classic Gray Theme Author: Juha Kujala	<div><div>✔ Activate</div><div>⚙ Configure</div></div>

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

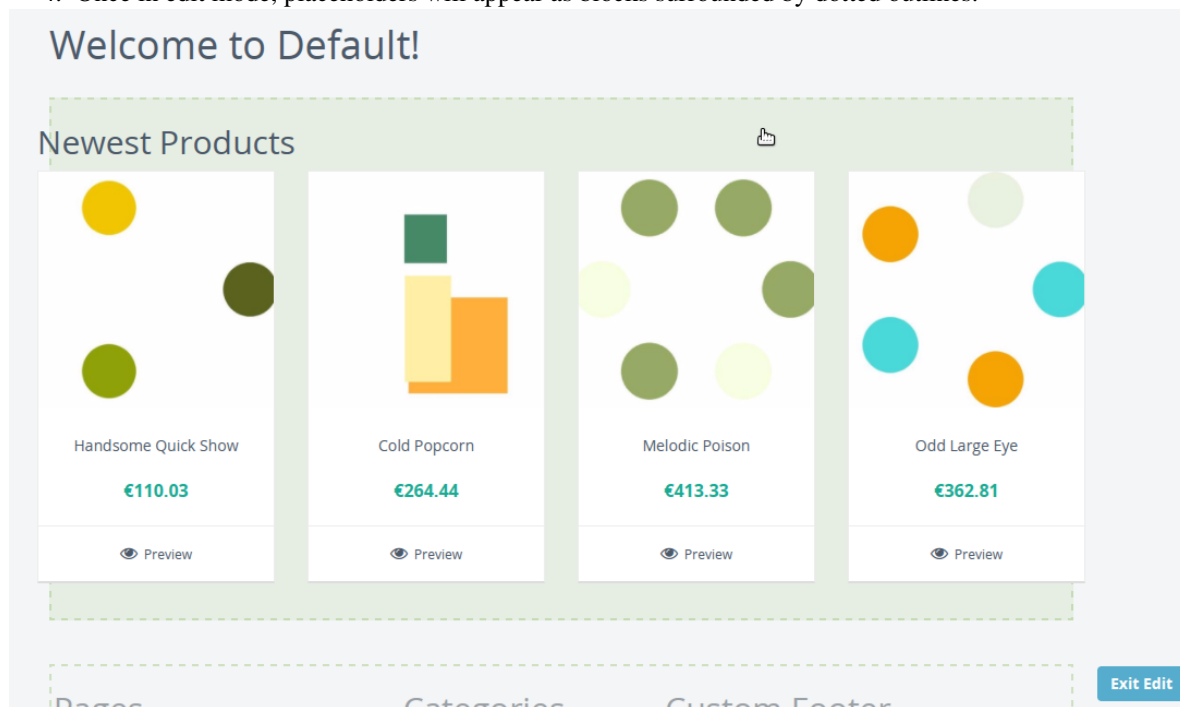
### 3.3 Editing a Page

To edit a page:

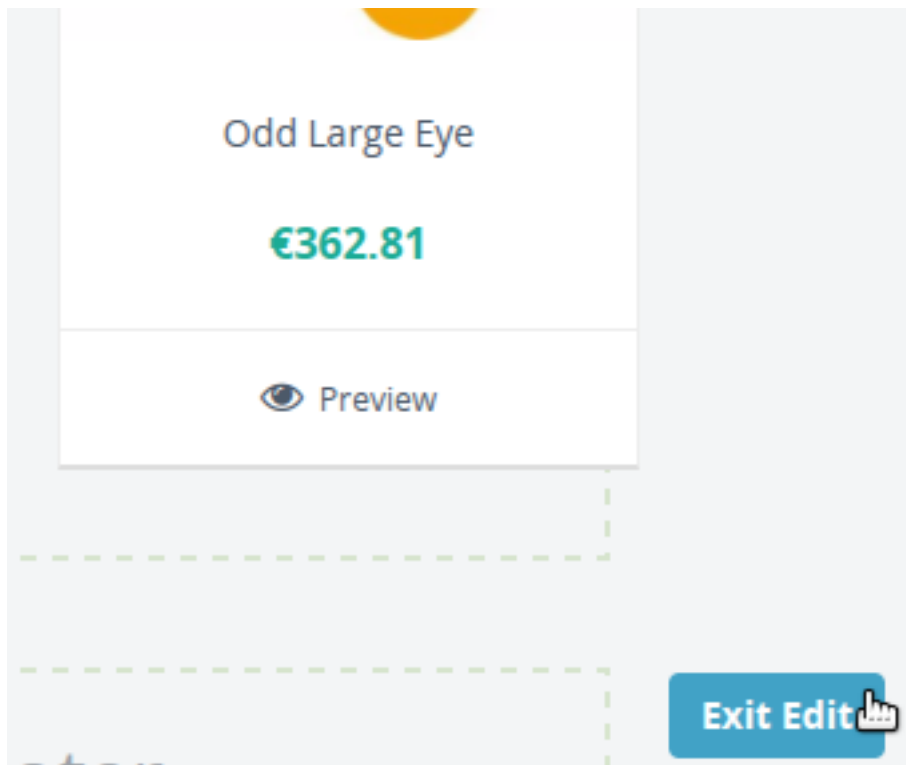
1. Log in as an administrative user.
2. Navigate to the page on the shop front you want to edit.
3. Click the *Edit Page* button in the lower right hand core to enter edit mode.



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 normal mode.



## 3.4 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.

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**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.

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## 3.5 Plugins

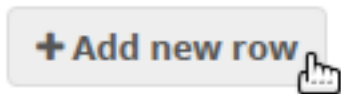
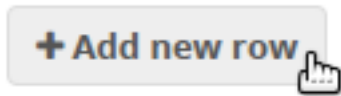
Shuup Xtheme plugins provide an easy way for merchants to customize their shop frontend.

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

### 3.5.1 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.

### Edit Placeholder: front\_content

Product Highlights		
Product Highlights		
None		

+ Add new row

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

Plugin:	<div>Text ▼</div>
Cell width:	<div>Full Width ▼</div>

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

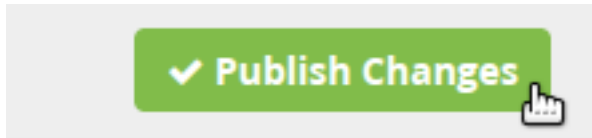


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**Note:** While in edit mode, placeholder changes will be visible. However, they will not be visible outside edit mode until they have been published.

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





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## Payment and Shipping

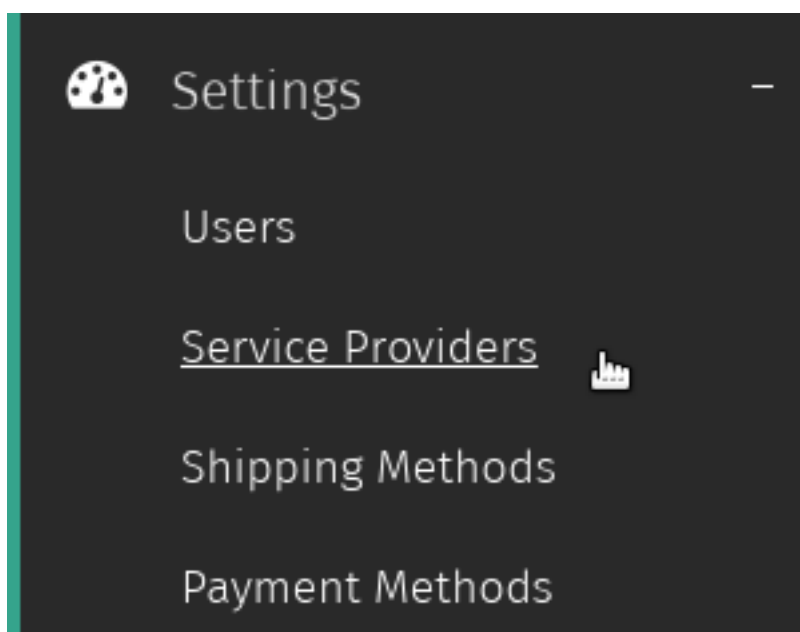
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In Shuup, payment and shippings choices are associated with particular service providers. These may be provided by Shuup's build-in carriers or payment process, or may be provided by payment or shipping-related addons.

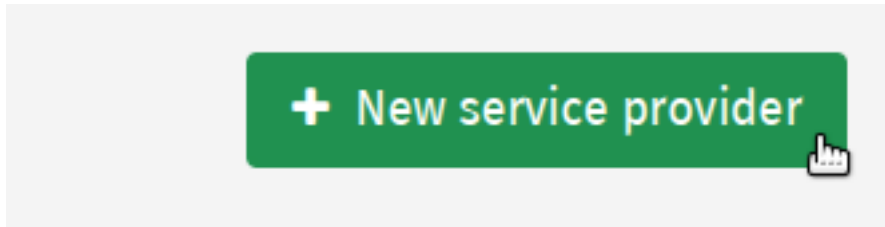
### 4.1 Service Providers

#### 4.1.1 Creating a Payment/Service Provider

1. Navigate to the Service Providers admin page by clicking *Service Providers* under the *Settings* 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.

Type \*

---

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

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

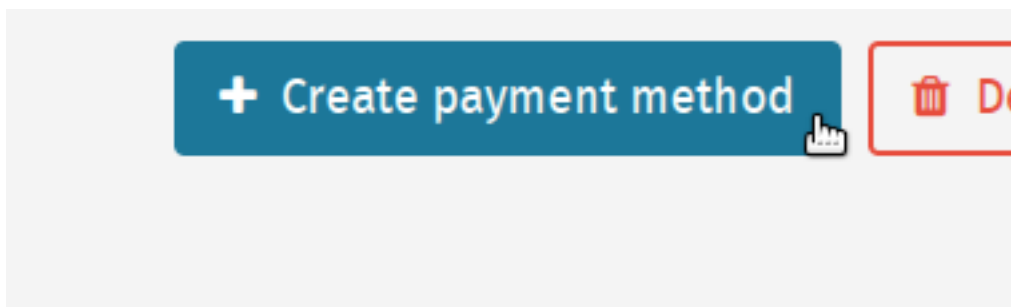
Name [English] \*

Enabled ☒

Logo   —

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.

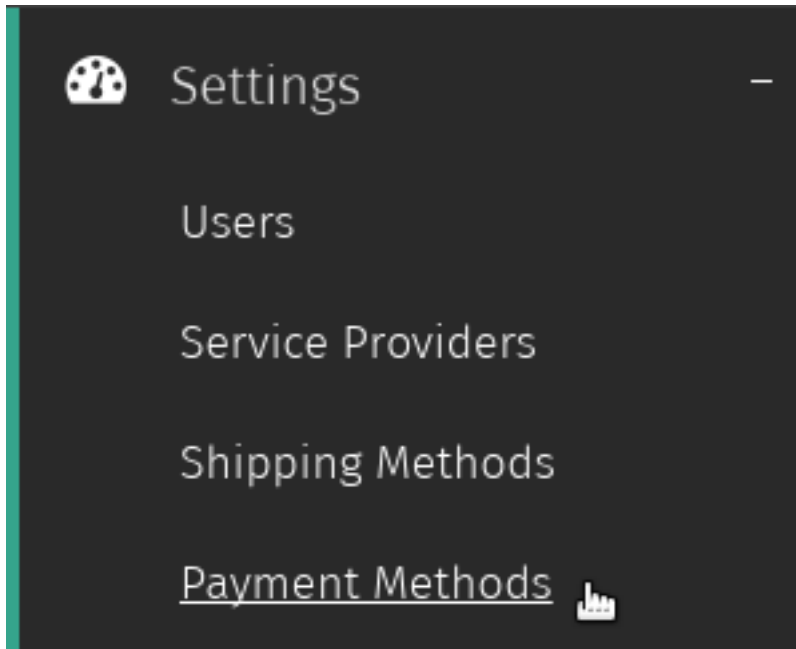
See [Creating a Payment Method](#) and [Creating a Shipping Method](#).



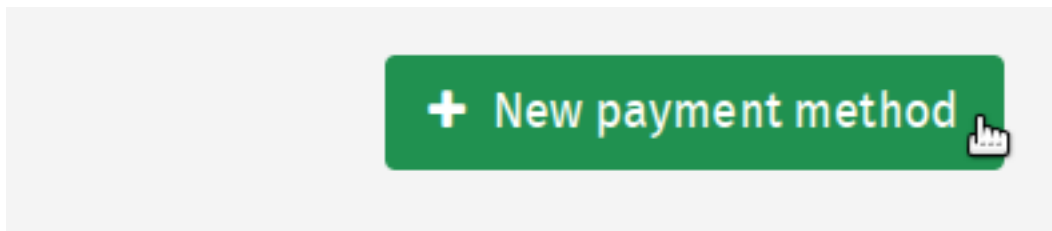
## 4.2 Payment Methods

### 4.2.1 Creating a Payment Method

1. Navigate to the Payment Method admin by clicking *Payment Methods* under the *Settings* 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.

Payment processor\*

Select payment processor before filling other fields.

Service\*

4. Enter the remaining information for the method.

Name [English] \*

Description [English]

Enabled ☒

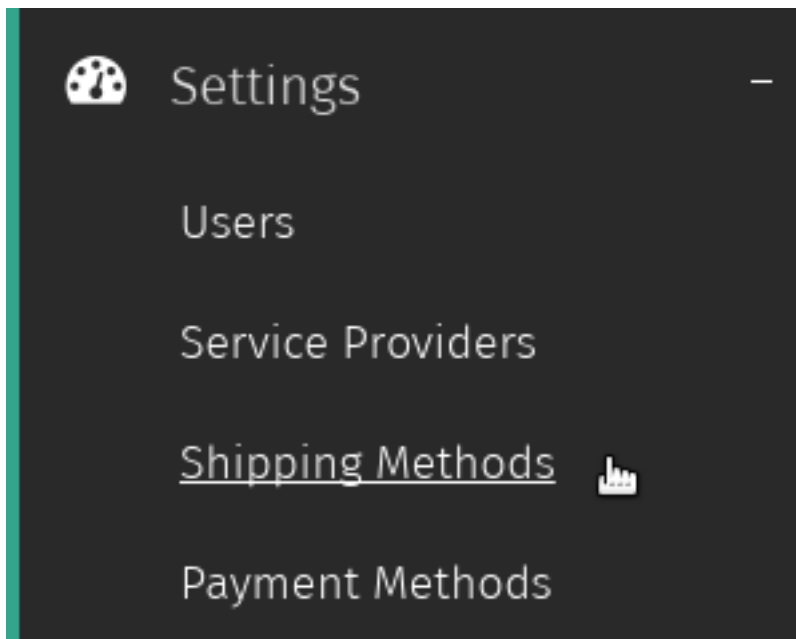
Shop \*

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

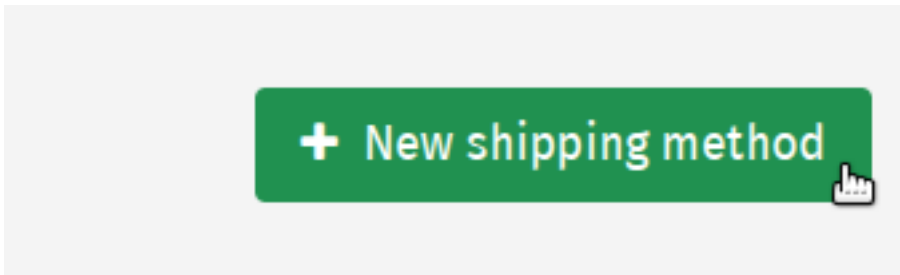
## 4.3 Shipping Methods

### 4.3.1 Creating a Shipping Method

1. Navigate to the Shipping Method admin by clicking *Shipping Methods* under the *Settings* 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

Carrier\* Carrier ▼  
 Select carrier before filling other fields.

Service\* Manually processed shipment ▼

4. Enter the remaining information for the method.

Name [English]\* Your custom shipping method

Description [English] Here is a description for your customers

---

Enabled ☒

Shop\* Default ▼

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

## 4.4 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

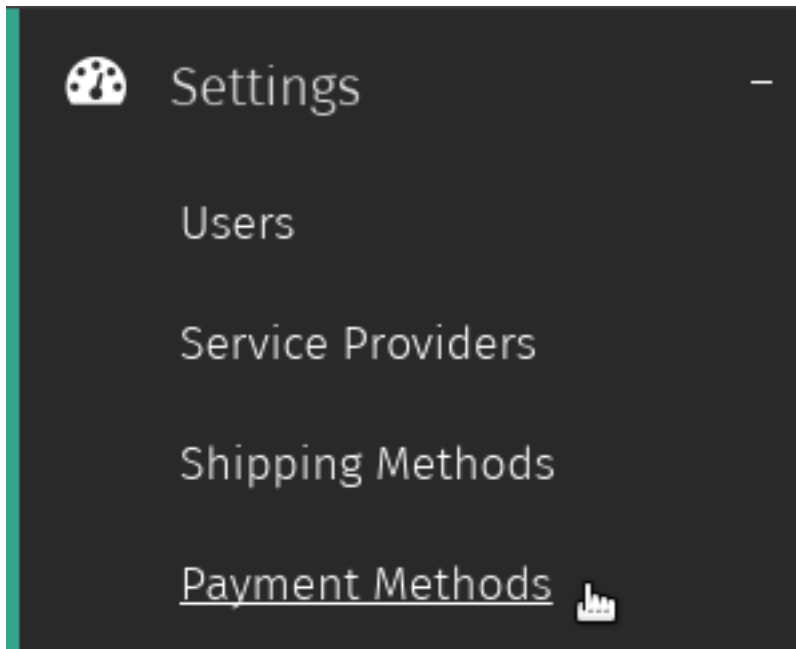
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**Note:** If there are multiple valid weight-based pricing ranges for an order, the cheapest-option will be selected.

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### 4.4.1 Adding a Behavior Component to a Method

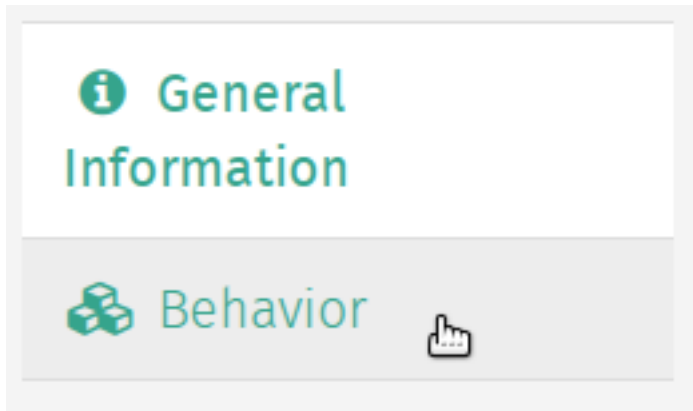
1. Navigate to the Shipping or Payment Methods admin by clicking *Shipping Methods* or *Payment Methods* under the *Settings* category from the Shuup Admin menu.



2. Select the shipping or payment method to which you want to add behavior components.


↕ Name	Service choice	↕ Enabled	↕ Shop	↕ Payment Processor
Filter by Name				
<a href="#">PaymentMethod</a>	Manually processed payment	yes	Default	Manual payment processing

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.

Behavior component type

+ Add 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.





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## Domains

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Feature coming soon!



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## Tax Settings

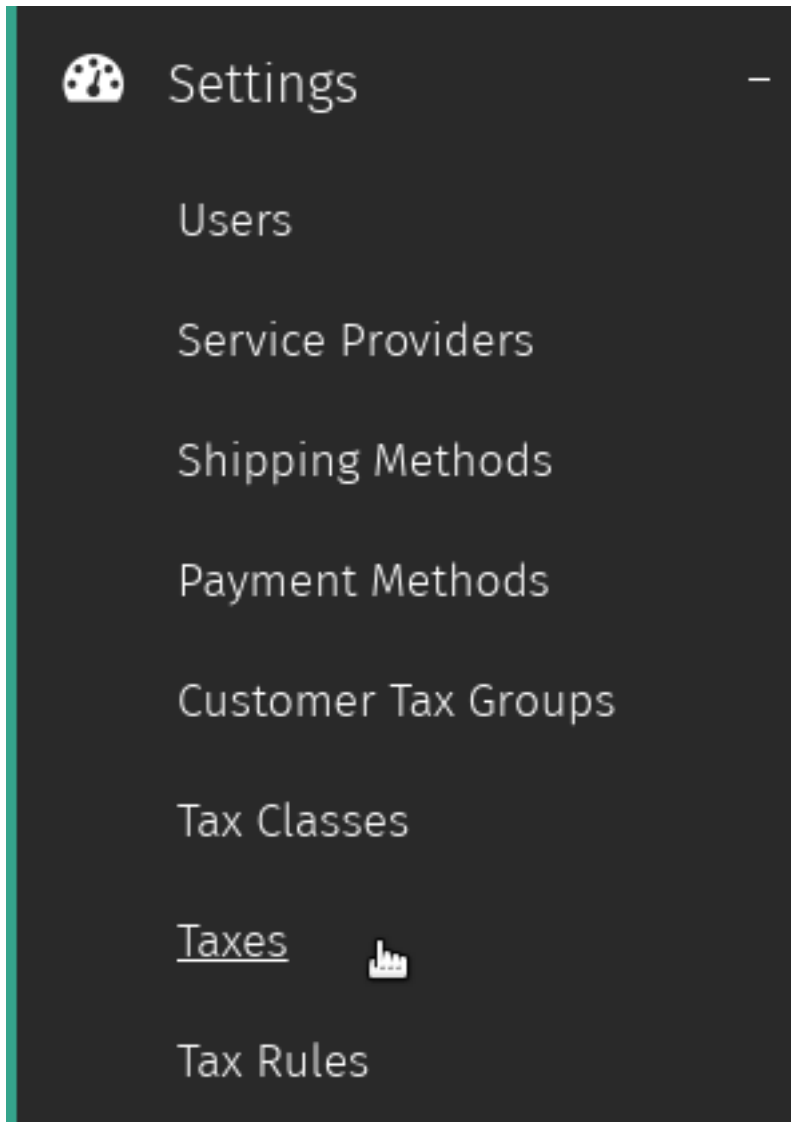
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### 6.1 Taxes

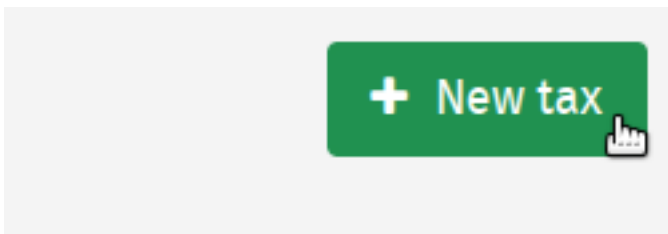
#### 6.1.1 Creating a New Tax

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).

Name [English] \*

---

Enabled ☒

Code

Tax rate

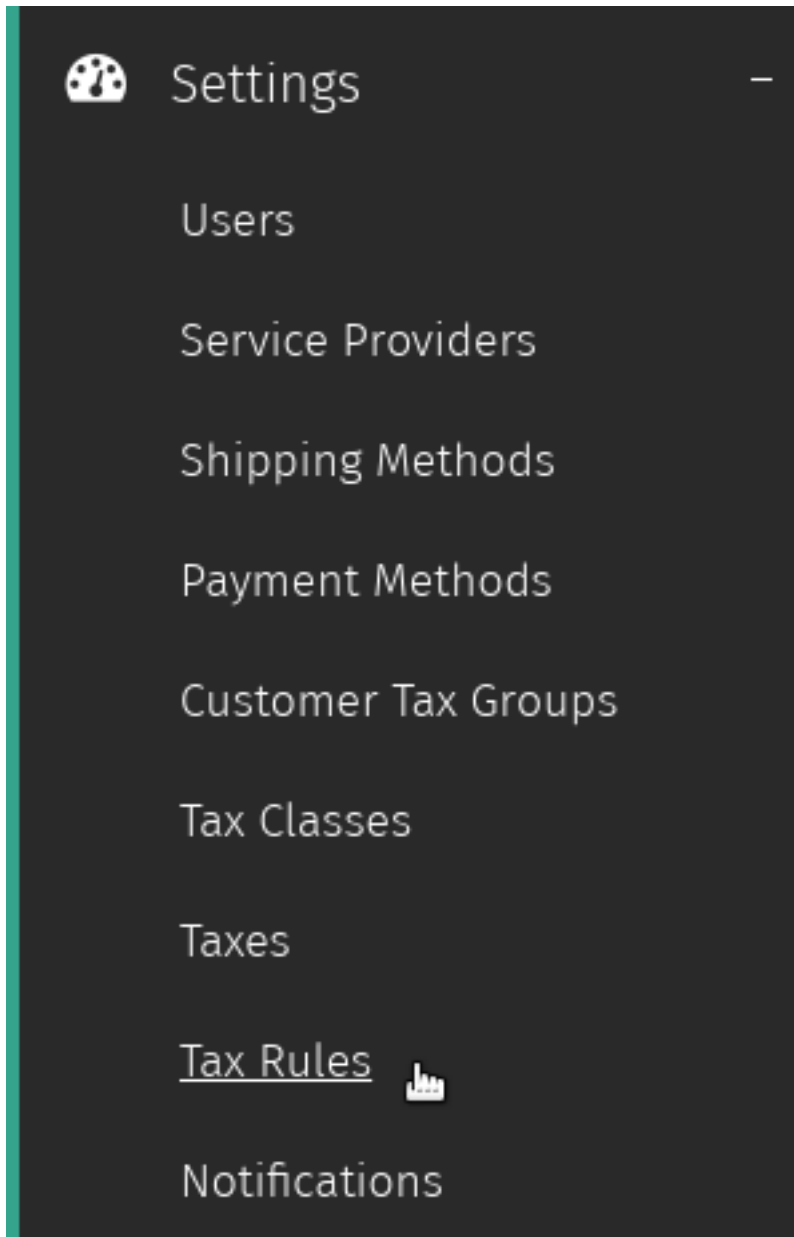
The percentage rate of the tax.

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

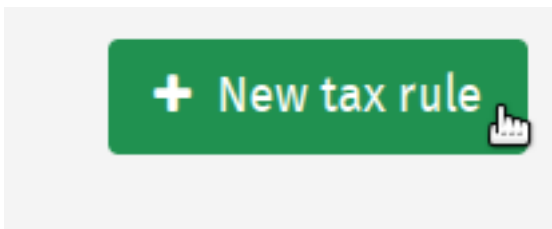
## 6.2 Tax Rules

### 6.2.1 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.

Override group  
number \*

0

If several rules match, only the rules with the highest override group number will be effective. This can be used, for example, to implement tax exemption by adding a rule with very high override group that sets a zero tax.

## Applied tax

When this rule applies, apply the following tax.

Tax \*

Sales Tax

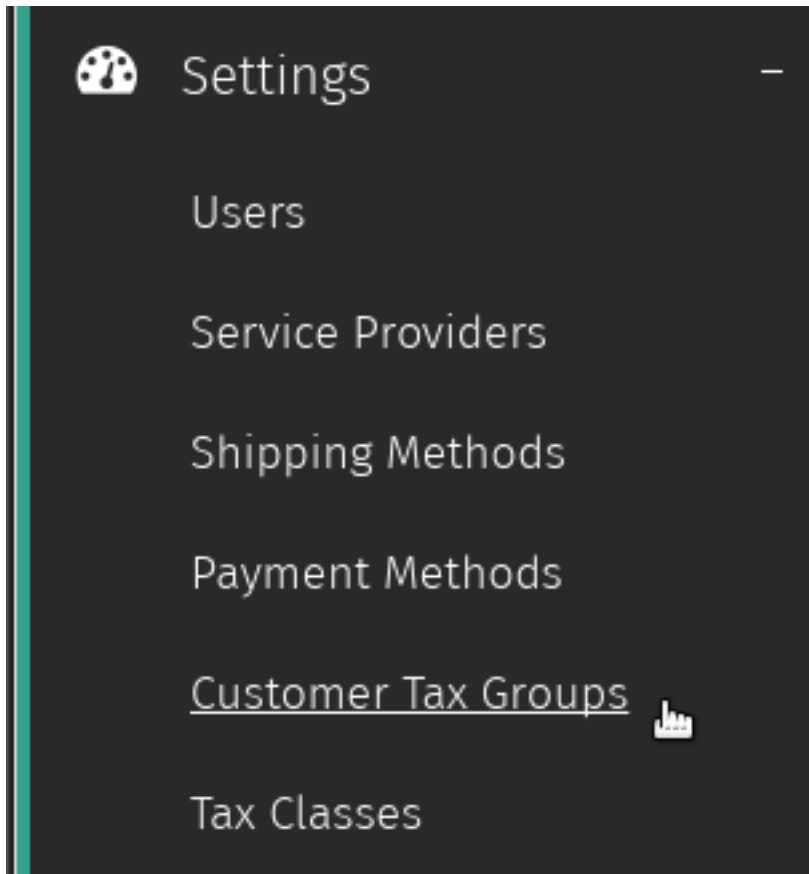


4. Click *Save* to save the new tax rule.

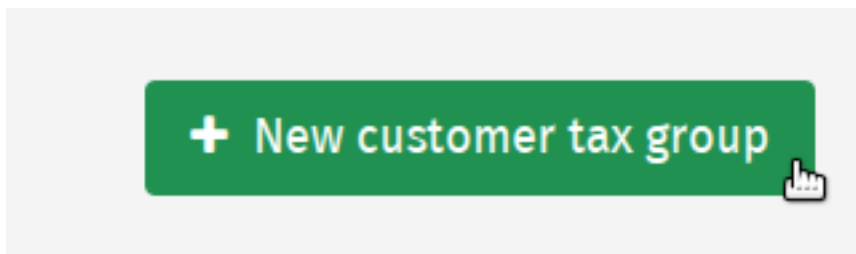
## 6.3 Customer Tax Groups

### 6.3.1 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.

Name [English] \*

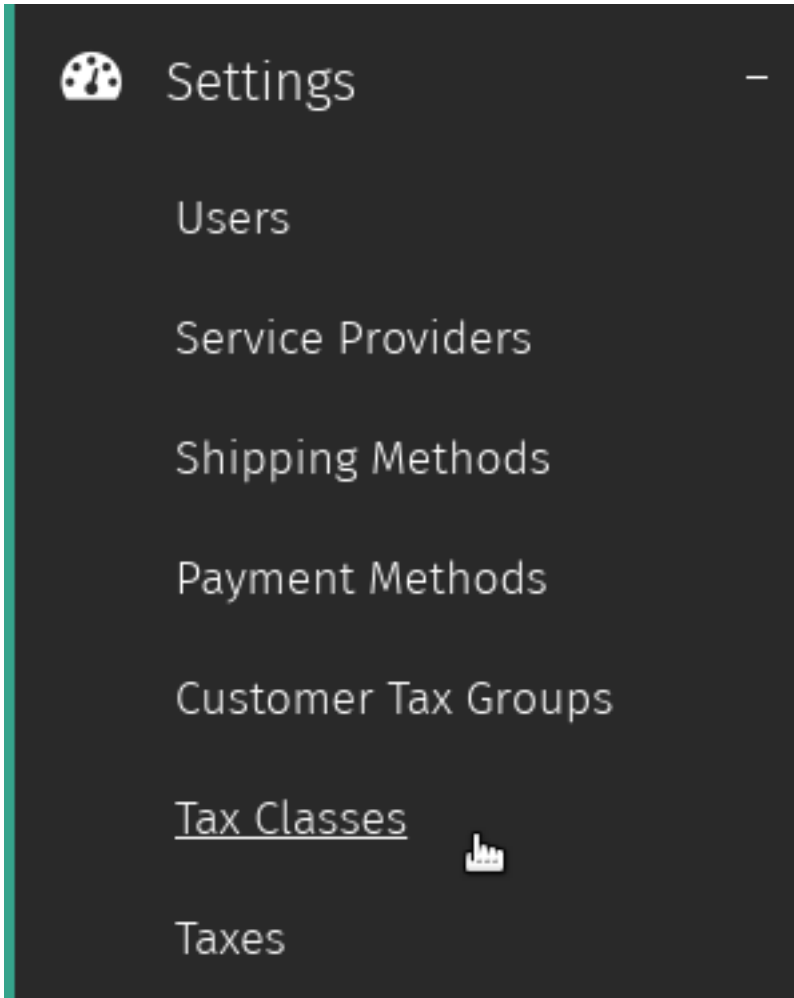
4. Click *Save* to save the new customer tax group.



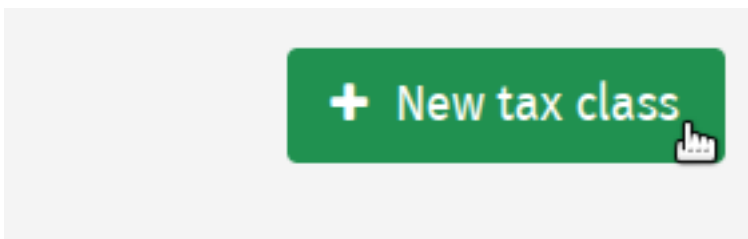
## 6.4 Tax Classes

### 6.4.1 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.

Name [English]\*

Custom Tax Class



Enabled ☒

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

## 6.5 Display Settings

### 6.5.1 Shop Settings

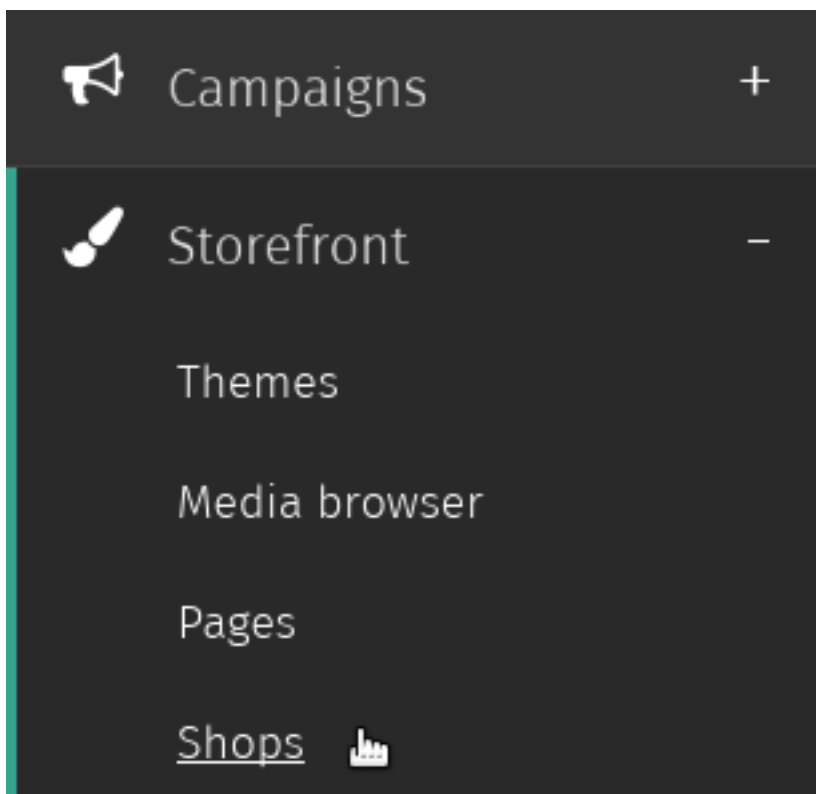
---

**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 *Storefront* category from the Shuup Admin menu.



2. Select the shop whose tax display settings you would like to modify.

↕ Name	↕ Domain	↕ Identifier	↕ Status
Filter by Name			
Default		default	enabled

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

Status\* enabled

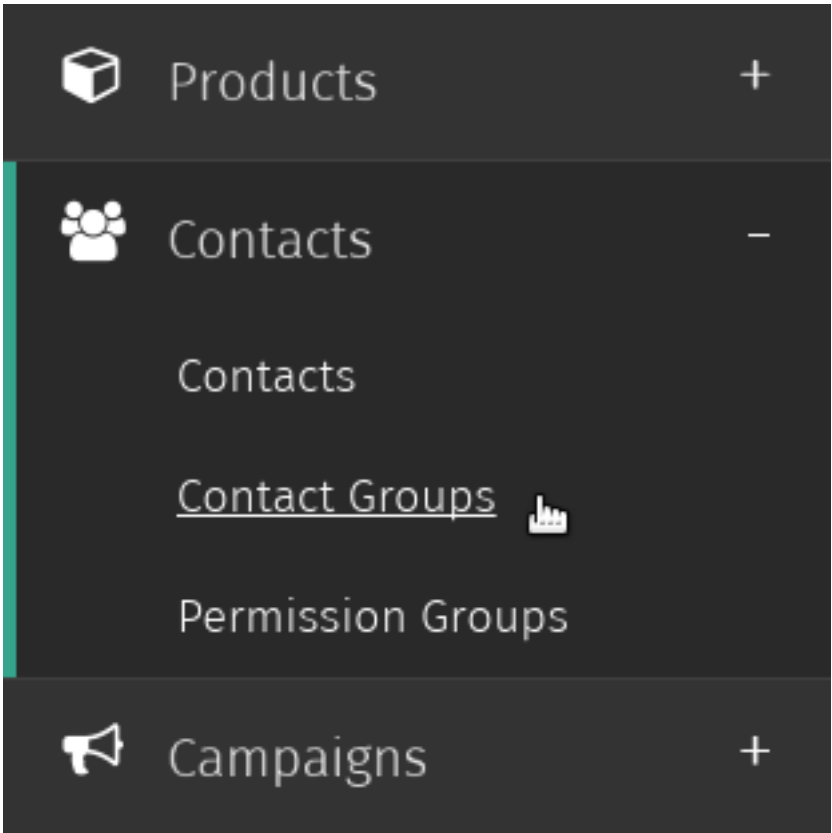
Currency\* EUR

Prices include tax ☒

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

## 6.5.2 Contact Group Settings

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 tax display settings you want to configure.

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

3. Set the price-display mode for the contact group.

Name [English] \*

Person Contacts

Price display mode \*

show pre-tax prices ▼

4. Click *Save* to save the price-display settings for that contact group.

---

## Orders

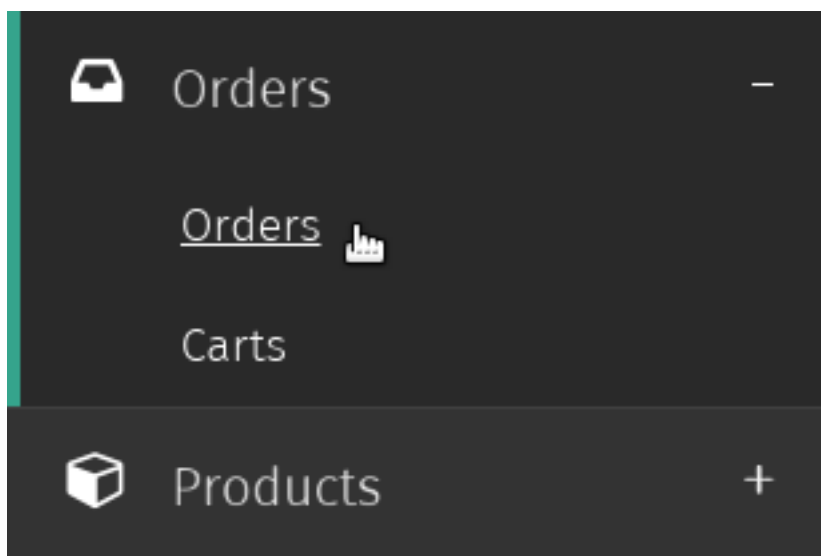
---

### 7.1 Creating an Order

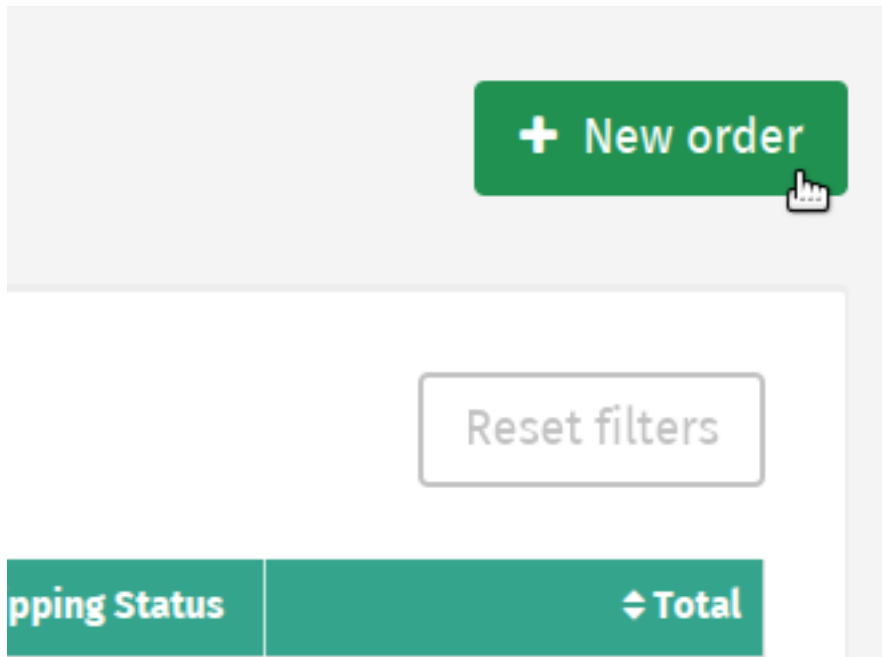
Orders can be made in one of two ways—by a customer through the shop front or by a merchant through the Shuup Admin.

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



- Under the *Customer details* section, click *Select Existing Customer* to launch the customer selection popup, or leave choice as *New Customer* to create a new customer along with the order.

A new customer will be created based on billing address.

Customer
Select Existing Customer
New Customer

☒ Save customer details while creating order
 ☒ Ship to billing address
 ☐ Order for company

Billing Address

Name\*

Tax number

Phone


Email

Enter any required or missing address information.

- 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.

Orderline type		Qty	Base Unit Price	Discounted Unit Price	Discount Percent	Total Discount Amount	Line Total	
Product	<a href="#">Dry Corn (PalCvbyv)</a>	1	401.8	401.8	0.00	0	401.8	

[+ Add new line](#)

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

- 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:

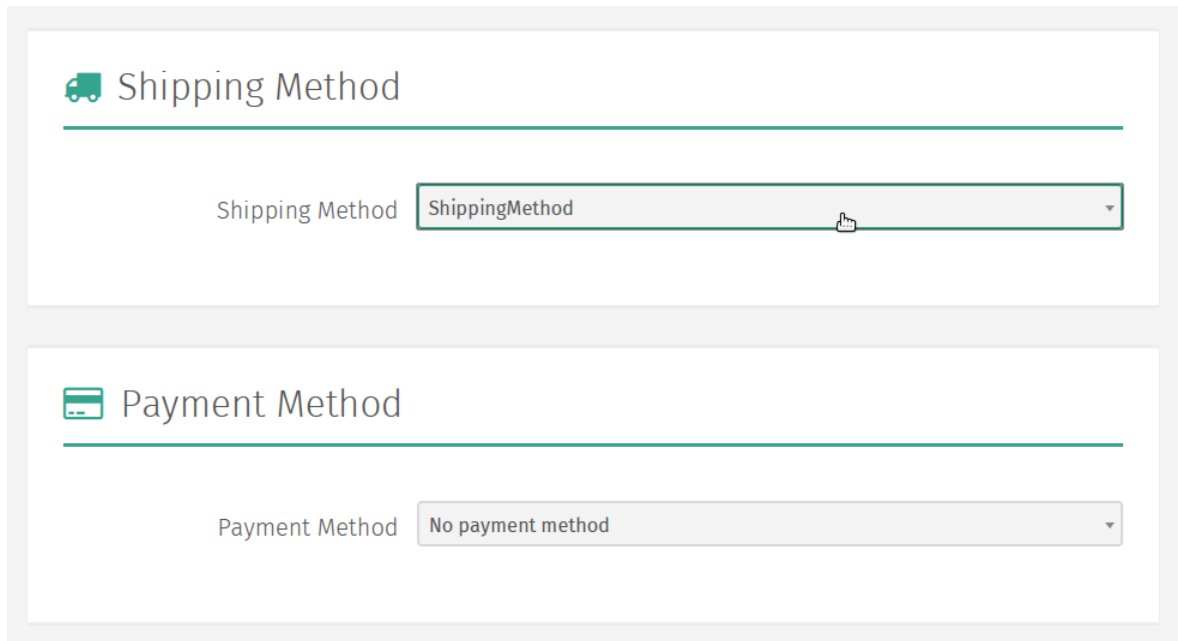
- Enter a product name, sku, or barcode number and select desired product from the dropdown results.
- Press the plus button to add the product line to order, or press the trash button to clear the input and select a new product.

## Quick add product line




Search product by name, SKU, or barcode and press button to add product line.

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



The screenshot shows two sections of a checkout form. The first section, titled 'Shipping Method' with a truck icon, contains a dropdown menu labeled 'Shipping Method' with the value 'ShippingMethod' selected. The second section, titled 'Payment Method' with a credit card icon, contains a dropdown menu labeled 'Payment Method' with the value 'No payment method' selected.

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



The screenshot shows the checkout summary. On the left, the total amount '56.93 EUR' is displayed. On the right, there is a green button with a white checkmark and the text 'Proceed', with a mouse cursor hovering over it.

---

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

---

---

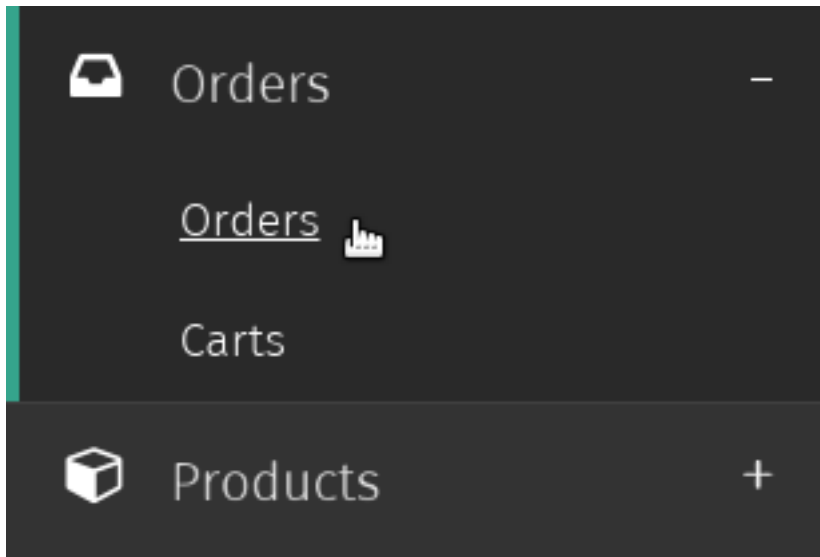
**Note:** Method rules, taxes and possible extra discounts are calculated after proceeding.

---

## 7.2 Editing an Order

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

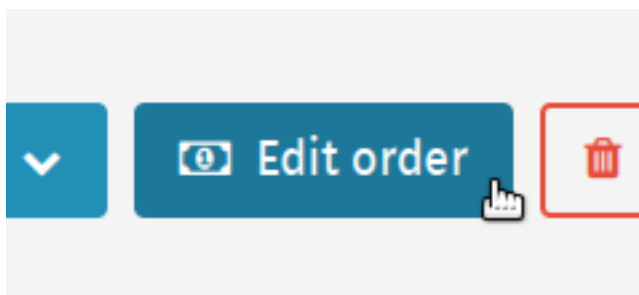




2. Select the order that you wish to edit.

Order	Order Date	Customer	Status
Filter by Order	mm/dd/yyyy mm/dd/yyyy	Filter by Customer	
9	<a href="#">May 13, 2016, 8:07:17 PM</a>	Émilie Dupuy	received
8	May 13, 2016, 6:01:16 PM	Kjell Lunde	received
7	May 13, 2016, 5:55:24 PM	Émilie Dupuy	received
6	May 13, 2016, 5:47:29 PM	Stiina Vitikka	canceled
5	May 13, 2016, 5:46:20 PM	Kjell Lunde	canceled

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



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

Country: Algeria

### Order Contents

If your product prices vary based on customer, you might want to select customer first.  
All prices are in EUR currency.  
All prices include taxes.

Orderline type	Qty	Base Unit Price	Discounted Unit Price	Discount Percent	Total Discount Amount	Line Total
Pro... Shallow Jealous Dock (ShuupPU)	1.000000000	409.250000000	368.325	10.3	40.930000000000001	368.32

+ Add new line

### Shipping Method

Shipping Method: ShippingMethod

Method rules, taxes and possible extra discounts are calculated after proceeding. Total: 368.32 EUR Proceed

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

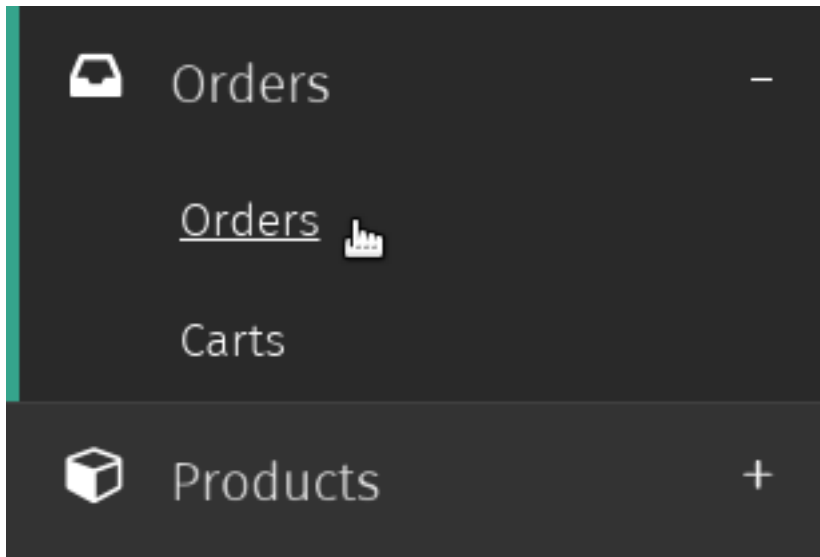
368.32 EUR ✓ Proceed

## 7.3 Order Shipments

### 7.3.1 Creating an Order Shipment

To create an order shipment:

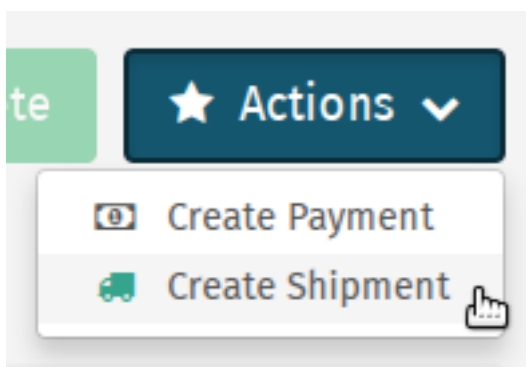
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



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

Order	Order Date	Customer	Status
Filter by Order	mm/dd/yyyy	Filter by Customer	
9	<u>May 13, 2016, 8:07:17 PM</u>	Émilie Dupuy	received
8	May 13, 2016, 6:01:16 PM	Kjell Lunde	received
7	May 13, 2016, 5:55:24 PM	Émilie Dupuy	received
6	May 13, 2016, 5:47:29 PM	Stiina Vitikka	canceled
5	May 13, 2016, 5:46:20 PM	Kjell Lunde	canceled

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



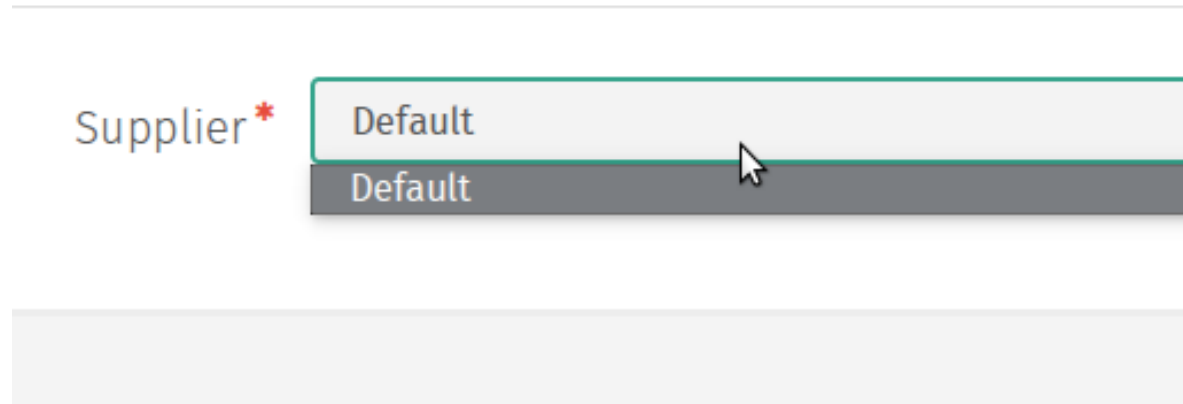
4. For each product, select the quantity of that product to include in the shipment. To easily select all remaining

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

Product	To Ship	Ordered	Shipped	Unshipped
Immense Father	1.000000000	1	0	1
	<a href="#">Set All Products To Ship</a>	1	0	1

Supplier\* Default

5. Select a product supplier from the dropdown menu.

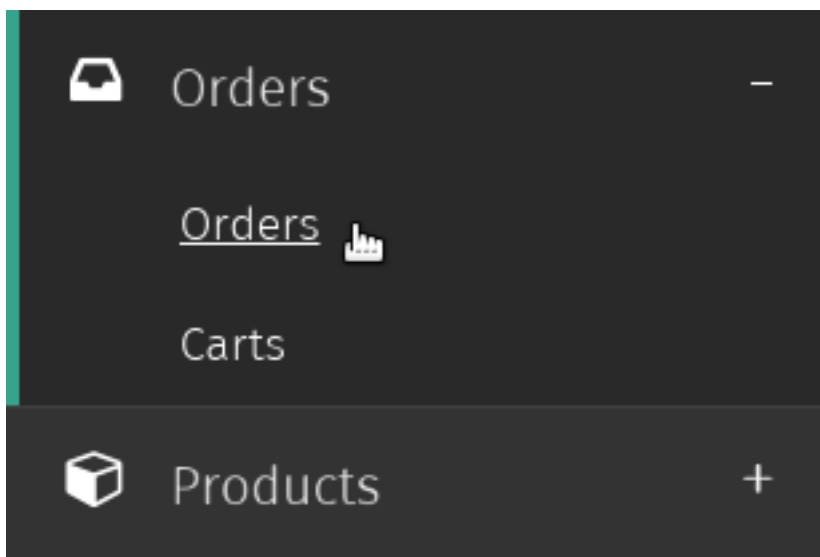


6. Click the *Create Shipment* button to create the shipment.

### 7.3.2 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.



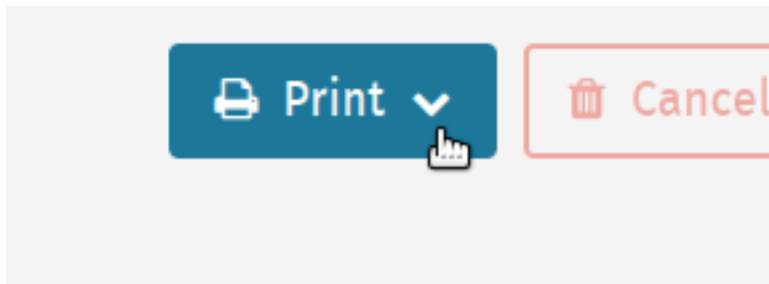
2. Select the order whose delivery slip you want to print

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

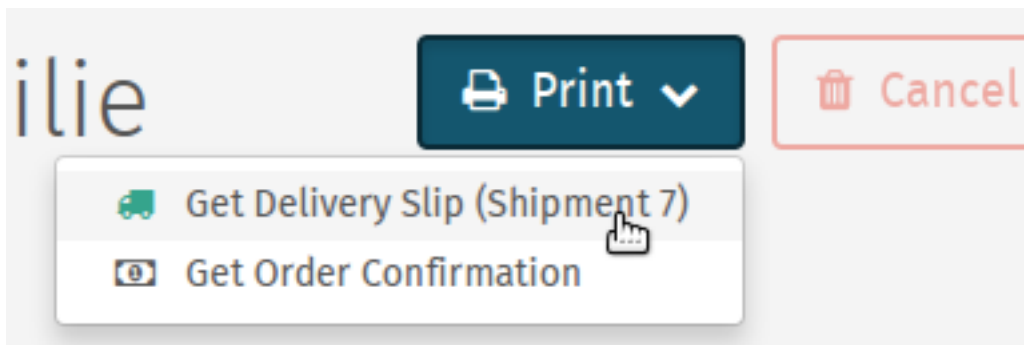
- If you haven't already done so, create an order shipment.

See *Creating an Order Shipment*

- Click *Print* in the Orders admin toolbar



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



- You will now be taken to a PDF of the delivery slip, which you can either print or save to your computer from your browser menu

1 / 1

Delivery slip | Default | Order 7

1/1

Order #7

13.05.2016

Émilie Dupuy

87, boulevard de Letellier 36 917 Leroux

Rodrigues

Timor-Leste

Identifier7

Shipment date13.5.2016 17:59

Order date13.5.2016 17:55

Shipped products

SKU	Text	Quantity
JhszKAcvtB	Massive Bedroom	1.00

Payment and shipping methods

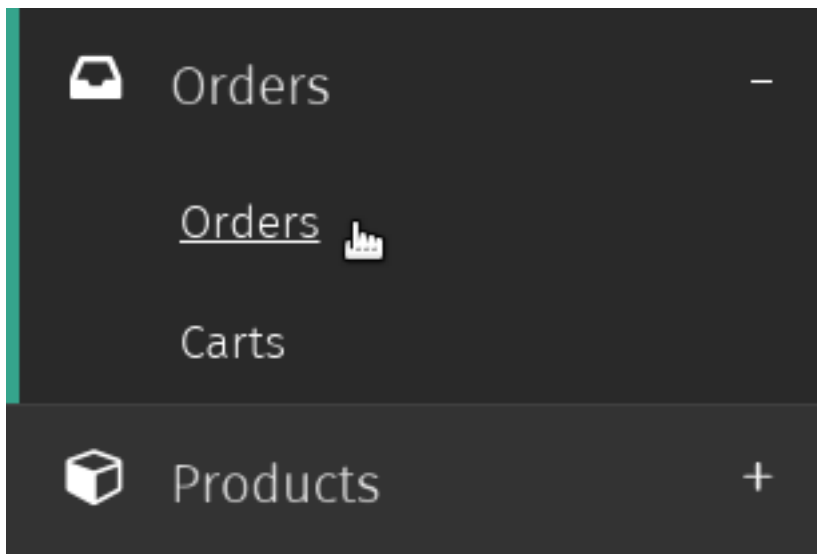
Text	Quantity	Tax	Total price
PaymentMethod	1.00	0.000%	€0.00
ShippingMethod	1.00	0.000%	€0.00

## 7.4 Order Payments

### 7.4.1 Viewing Order Payments

To view all payments for an order:

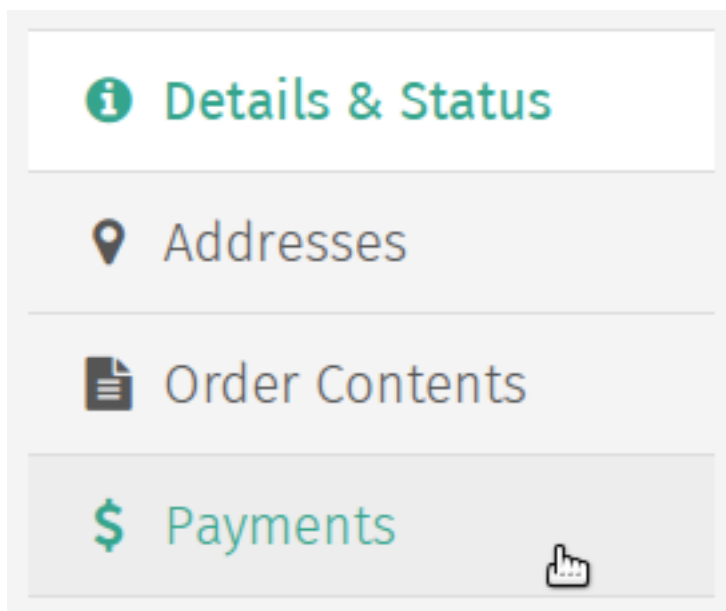
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order whose payments you want to view

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

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



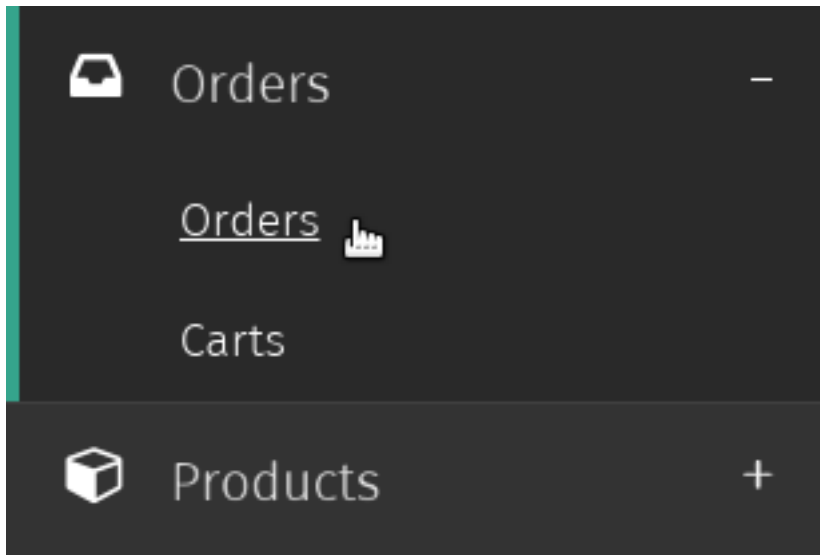
- Details will be listed for all payments associated with that order

\$ 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

## 7.4.2 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.

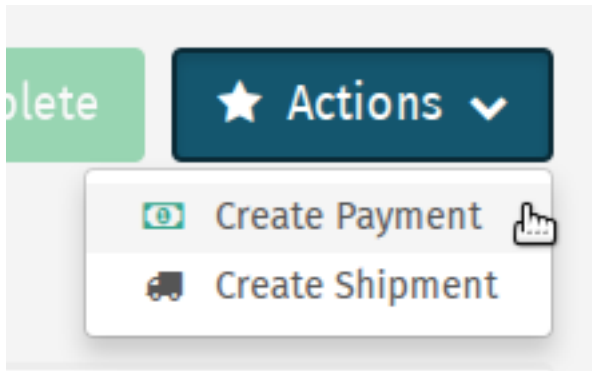


2. Select the order for which you want to create a payment

Order	Order Date	Customer	Status
Filter by Order	mm/dd/yyyy mm/dd/yyyy	Filter by Customer	
9	<u>May 13, 2016, 8:07:17 PM</u>	Émilie Dupuy	received
8	May 13, 2016, 6:01:16 PM	Kjell Lunde	received
7	May 13, 2016, 5:55:24 PM	Émilie Dupuy	received
6	May 13, 2016, 5:47:29 PM	Stiina Vitikka	canceled
5	May 13, 2016, 5:46:20 PM	Kjell Lunde	canceled

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.

SKU	Text	Taxless Unit Price	Quantity	Taxless Discount	Tax	Taxless Total	Total incl. Tax
slypcWSBY	Immense Father	€266.60	1	-	0%	€266.60	€266.60
	PaymentMethod	€0.00	1	-	0%	€0.00	€0.00
	ShippingMethod	€0.00	1	-	0%	€0.00	€0.00
						<b>€266.60</b>	<b>€266.60</b>

Paid: €0.00

Remaining: €266.60

Get Remaining Total

Payment amount \* 266.600000000

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

## 7.5 Order Refunds

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

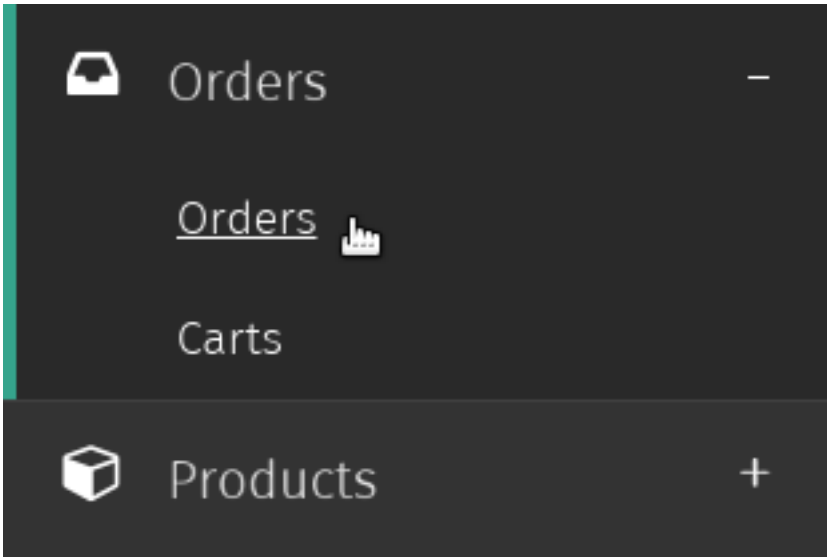
However, refund amounts are not restricted by existing payment amounts, meaning it is possible to refund more than has been actually paid.

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:

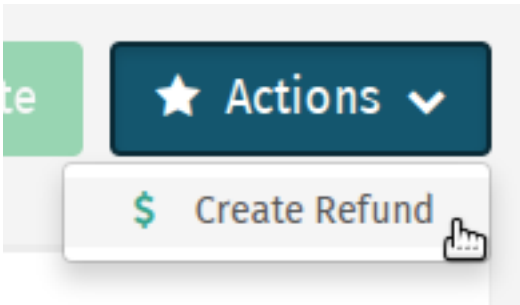
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



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

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

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.

Line number

Quantity

Amount

Restock products ☒

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.

---

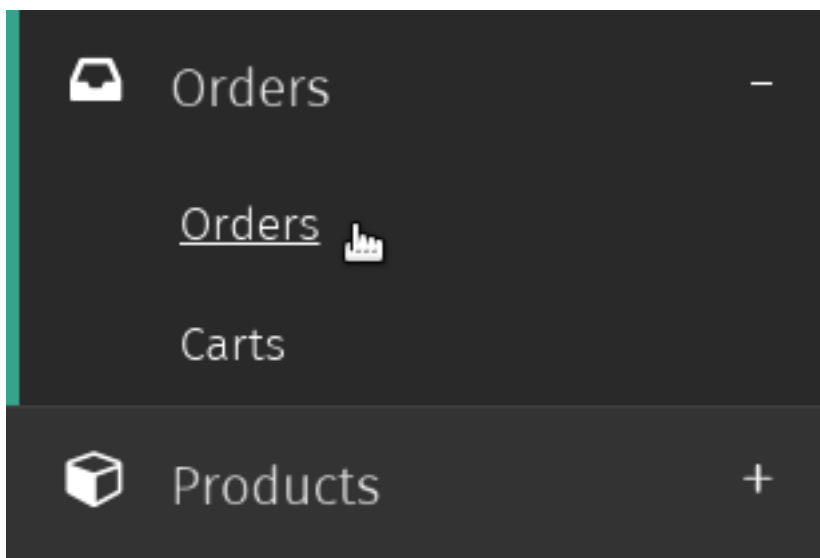
- Click the *Add More Refunds* button to add additional refund forms.



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

To create a full refund for an order:

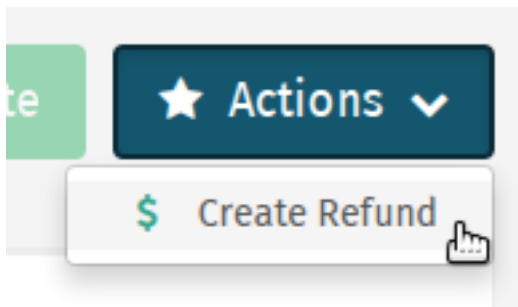
- Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



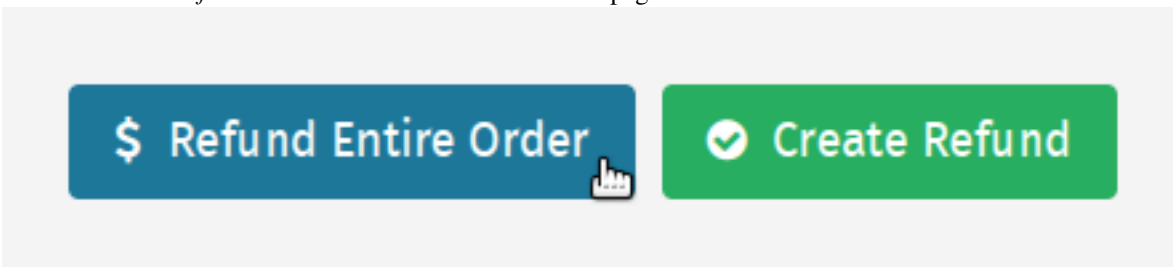
- Select the order for which you want to create a refund.

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

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



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



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

## 7.6 Canceling an Order

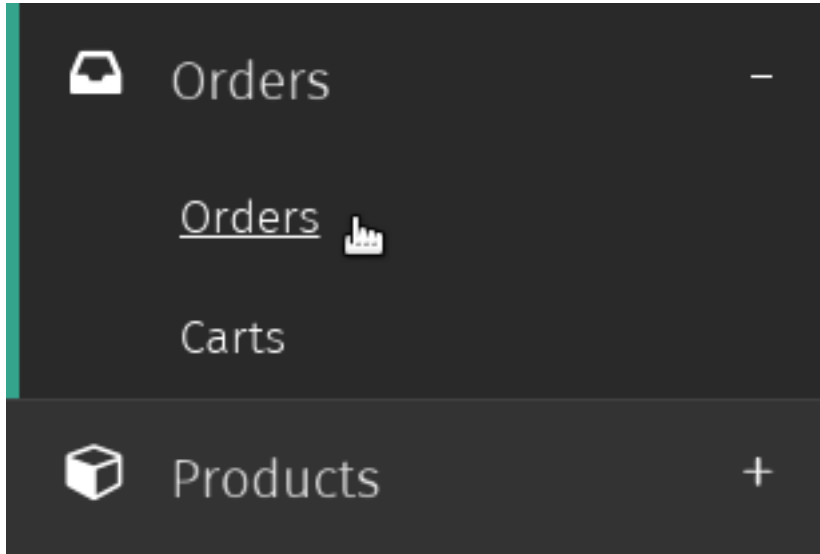
**Note:** Only unpaid and unshipped orders can be canceled.

If an order has been fully paid or fully shipped, the *Cancel Order* button will be disabled and you will not be able to

cancel the order.

To cancel an order:

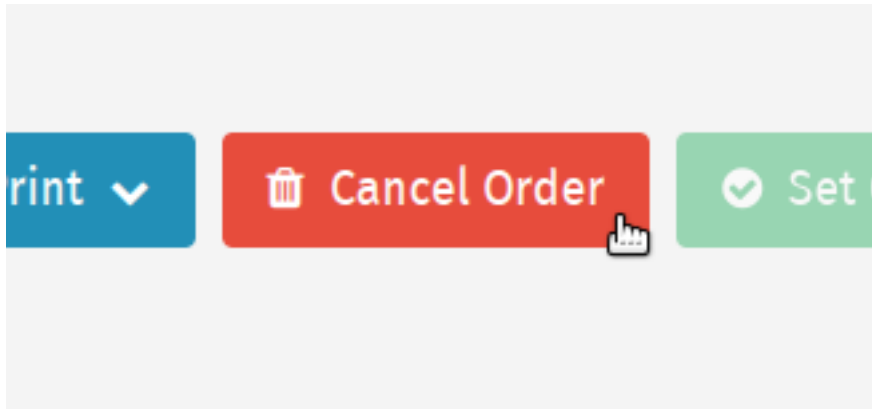
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order that you want to cancel

Order	Order Date	Customer	Status
Filter by Order	mm/dd/yyyy	Filter by Customer	
9	<a href="#">May 13, 2016, 8:07:17 PM</a>	Émilie Dupuy	received
8	May 13, 2016, 6:01:16 PM	Kjell Lunde	received
7	May 13, 2016, 5:55:24 PM	Émilie Dupuy	received
6	May 13, 2016, 5:47:29 PM	Stiina Vitikka	canceled
5	May 13, 2016, 5:46:20 PM	Kjell Lunde	canceled

3. Click *Cancel Order* in the order toolbar



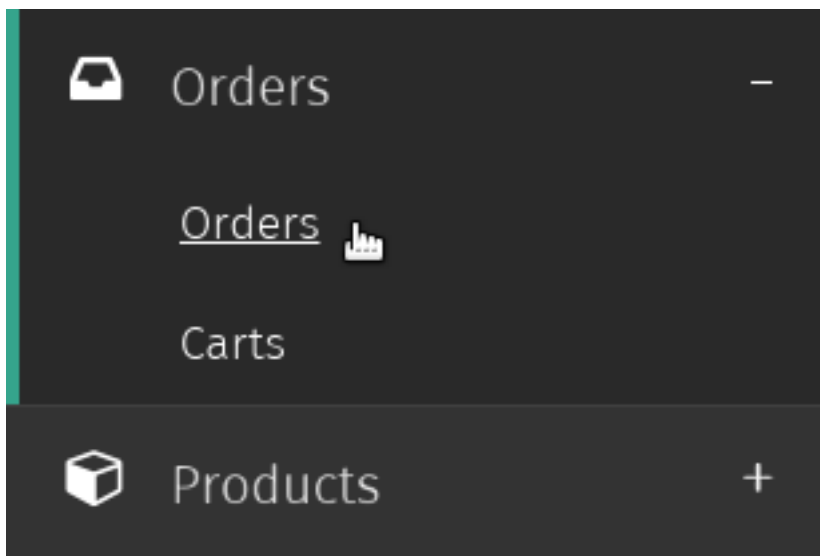
The order will now be marked as *canceled* in the Orders admin list.

## 7.7 Completing an Order

Once an order has been shipping, it can be marked as completed.

To set an order as complete:

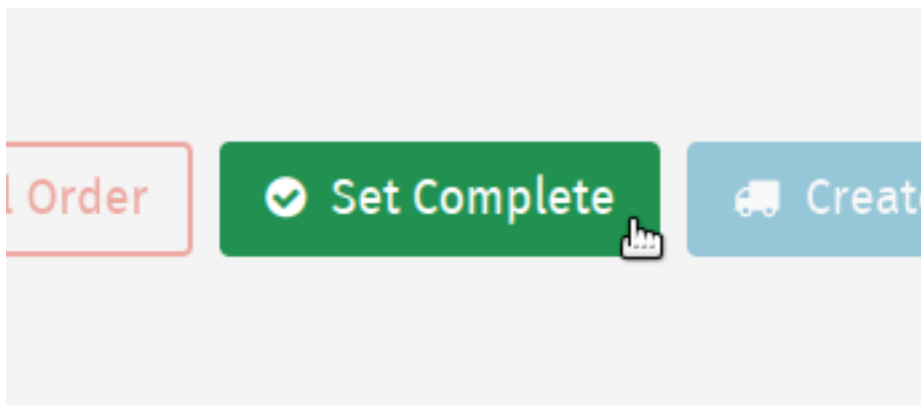
1. Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order you want to set complete

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

- Click *Set Complete* in the order toolbar

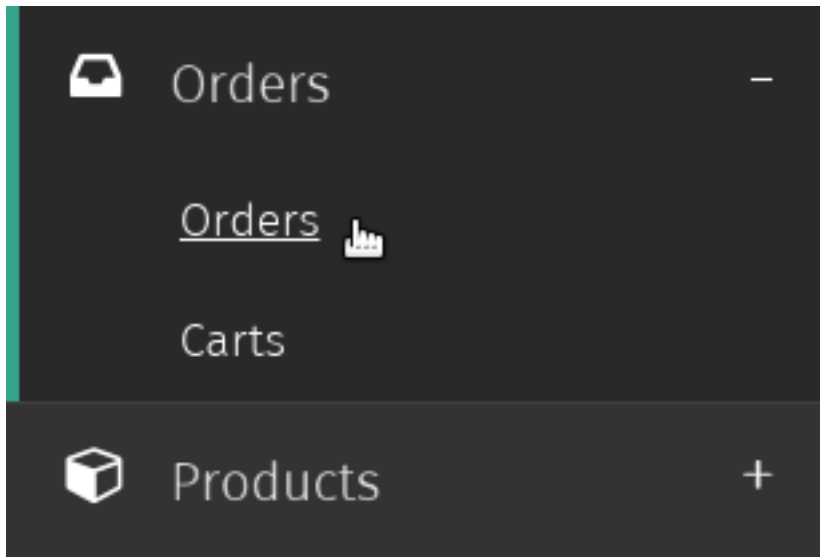


The order will now be marked as *completed*.

**Note:** If the order cannot be completed (not all items have been shipped), the *Set Complete* button will be disabled and you will not be able to complete the order.

## 7.8 Printing an Order Confirmation

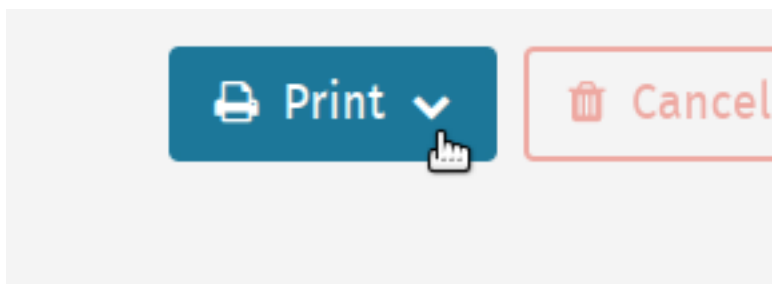
- Navigate to the Orders admin page by clicking *Orders* under the *Orders* category from the Shuup Admin menu.



2. Select the order whose confirmation you want to print

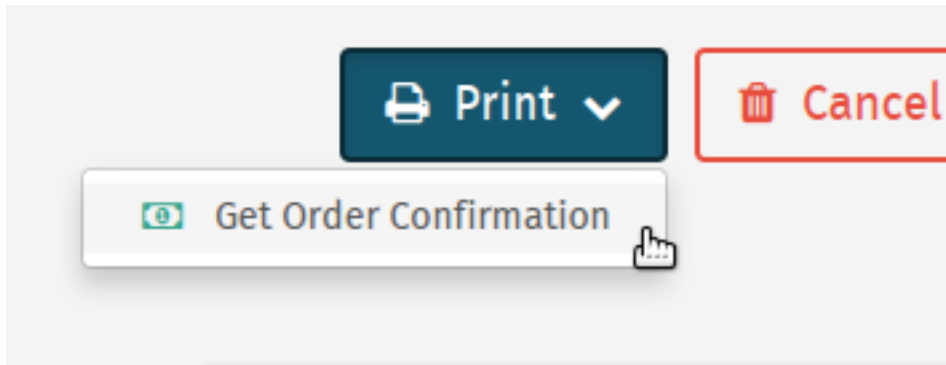
Order	Order Date	Customer	Status
Filter by Order	mm/dd/yyyy	Filter by Customer	
9	<u>May 13, 2016, 8:07:17 PM</u>	Émilie Dupuy	received
8	May 13, 2016, 6:01:16 PM	Kjell Lunde	received
7	May 13, 2016, 5:55:24 PM	Émilie Dupuy	received
6	May 13, 2016, 5:47:29 PM	Stiina Vitikka	canceled
5	May 13, 2016, 5:46:20 PM	Kjell Lunde	canceled

3. Click *Print* in the order toolbar



4. Select *Get Order Confirmation* from the dropdown menu





5. You will now be taken to a PDF of the order confirmation, which you can either print or save to your computer from your browser menu

1 / 1

Order confirmation | Default | Order 7 1/1

<b>Order #7</b> 13.05.2016				
<b>Émilie Dupuy</b> 87, boulevard de Letellier 36 917 Leroux Rodrigues Timor-Leste		Order number	7	
		Total price	€337.76	
		Payment status	not paid	
		Shipping status	fully shipped	
		Order date	13.5.2016 17:55	
		Comment		

SKU	Text	Quantity	Tax	Total price
JhszKAcvtB	Massive Bedroom	1.00	0.000%	€337.76
	PaymentMethod	1.00	0.000%	€0.00
	ShippingMethod	1.00	0.000%	€0.00
Taxful total				€337.76
Taxless total				€337.76

Tax	Tax percentage	Based on amount	Amount of tax	Total including tax
Untaxed	0.000%	€337.76	€0.00	€337.76



---

## Campaigns

---

Shuup Ecommerce 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.

### 8.1 Campaign Types

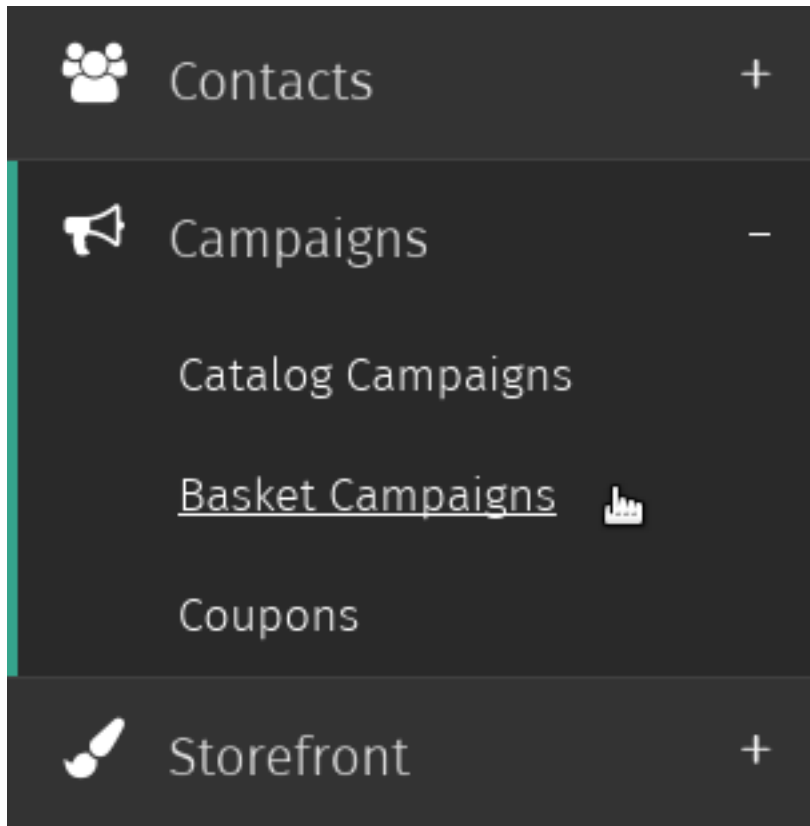
Shuup has two different types of campaigns:

**Basket Campaign** A campaign that is offered or fulfilled in Shuup shopping basket. For example, a customer may be given a 5% discount off their total order if their basket contains at least 10 products.

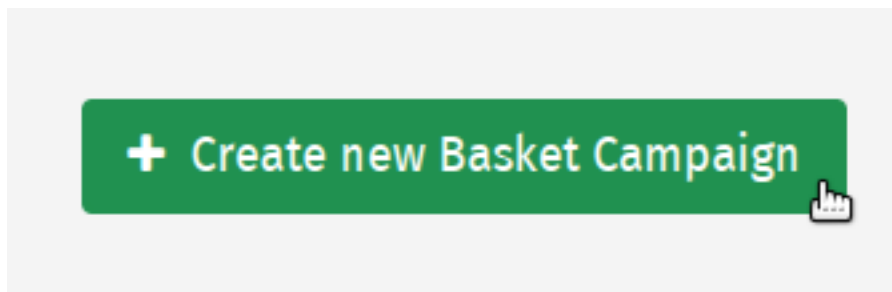
**Catalog Campaign** A campaign that is offered shop-wide based on the customer, product, product type, or other such conditions.

### 8.2 Creating a Campaign

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



2. Click either the *Create a new Basket Campaign* or *Create a new Catalog 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.

Name \* Summer Sale Extended  
The name for this campaign.

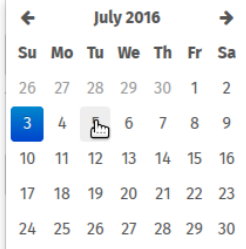
English Finnish Japanese zh-hans pt-br


Public name [English] \* Summer Sale Extended

Active ☒

Start date and time 2016-06-30 11:55

End date and time End date and time

Basket line text \* 

Coupon 

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 datepicker	No
End date and time	Setting end date for the campaign using datepicker	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.

- 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.

**Tip:** Try setting up a simple catalog campaign with a 5% discount for a particular product.

## 8.3 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. These may include having a basket with a certain total value (for a basket campaign) or requiring the customer to belong to a specific customer group (for a catalog campaign). 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.

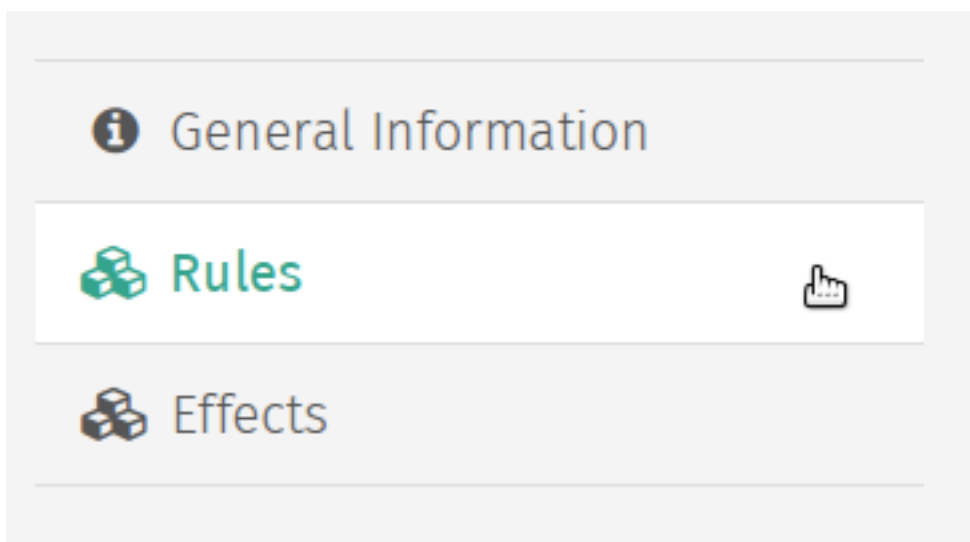
**Coupons** Used to limit usage of a basket campaign to only holders of a valid coupon code.

### 8.3.1 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 either 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 either the *Add rule* or *Add effect* button below to add a new rule or effect form.

Rule type

+ Add rule 

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

Rule type Products in basket ▾

[+ Add rule](#)

**Products in basket**

Limit the campaign to have the selected products in basket.

Quantity 1

Products in basket Pop

Cold Popcorn

Delete ☐

### 8.3.2 Basket Rules

The following rules are available to basket 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

**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 number of product A *or* a certain number 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

### 8.3.3 Catalog Rules

**Contact** Limit to selected customer contacts

**Contact Group** Limit to customers belonging to a specific contact group

**Product** Limit to a specific product

**Product Category** Limit to products belonging to a specific category

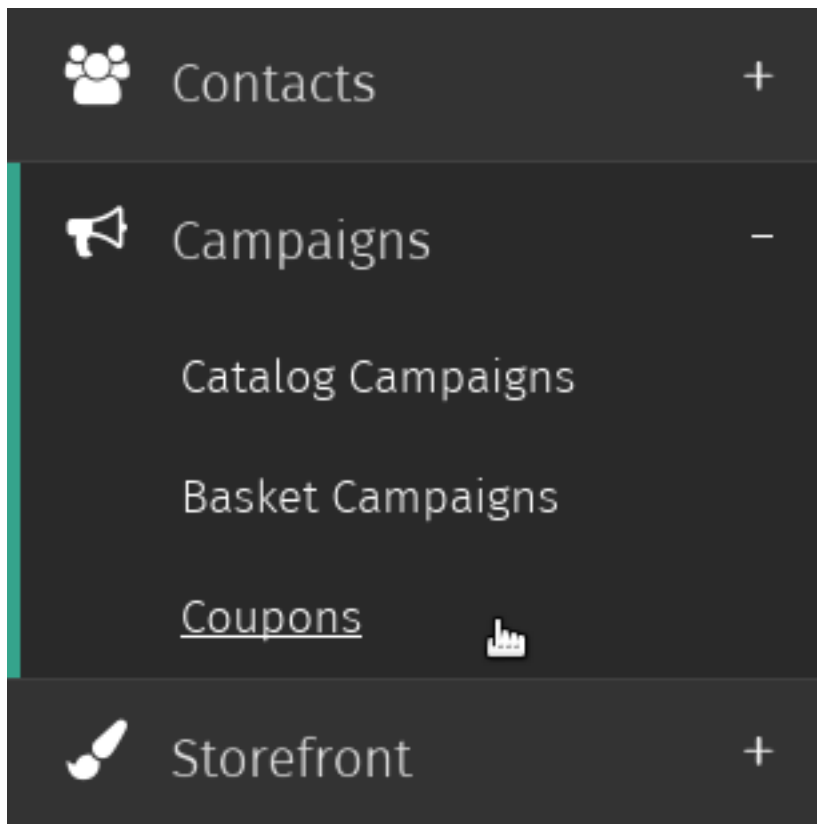
**Product Type** Limit to products of a specific type

### 8.3.4 Basket Effects

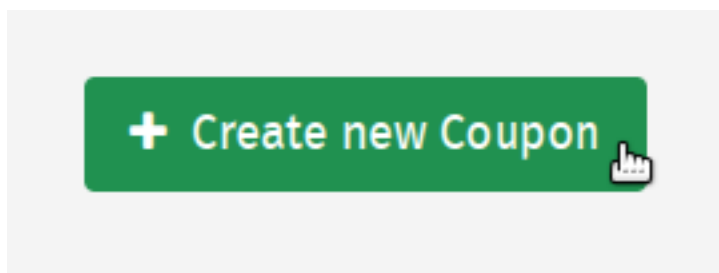
### 8.3.5 Campaign Effects

## 8.4 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.



Code\*  [Generate](#) 

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).

## General information

Code\*  [Generate](#)

Usage limit per customer

Limit the amount of usages per a single customer.

Usage limit   0 used

Set the absolute limit of usages for this coupon. If the limit is zero (0) coupon cannot be used.

Is active ☒

**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.



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## Stock Management

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Shuup comes with built in stock management system. The stock management isn't activated in shop admin by default, but the activation can be done by merchant in a few easy steps. The Stock management setup process is guided process in the Shuup shop admin.

Since all products aren't always stocked (like downloadable products) a good thing to keep in mind is, that to be able to manage product stock, a product must be first set as *Stocked*. Also to have a stock, it's required to have at least one *Supplier*. Stock can be easily managed in Shuup shop admin through any of the Stocked products, or in dedicated **Products / Stock management** view.

### 9.1 Activating Stock management

**Set supplier stock managed:**

1. Login into Shuup shop admin at <https://youshopurl.com/sa>
2. Open up the menu bar on top left hand side
3. Select **Products / Suppliers** and open up *Simple supplier*-module from Suppliers -table
4. Check on **Stock Managed** and **Save**

---

**Tip:** Shuup is prepared to use several supplier modules and each of them can have their own stock

---

### 9.2 Set product as stocked

Next, let Shuup know, which of your products are actually stocked. Decide which products stock you want to manage. Find these product in **Products / Products**

Open up the product you want to manage and check that the product has it's stock managed at **Additional details**. Set the option *stock* as **Stocked**.

---

**Tip:** This will activate Stock Management for the product. From now on the stock of this particular product can be managed in *Stock management*

---

## 9.3 Managing stock

Managing stock in Shuup is simply clean. Stock managing is available through each specific product at *Products* or at it's own *Stock management*-views in shop admin.

Whether the merchant needs to manage only one product, or several product stocks at a time, in both of the use case variations the stock management behaviour is the same. The only difference is, that in Stock Management view a merchant may easily view all the products at one glimpse and manage their stocks. In product settings view the stock is managed only for one particular product.

This way the stock management is easy whether merchant is browsing for a single product and has a sudden need to manage it's stock, or adding various products to the stock at once.

---

**Tip:** When adding stock, it's good to notice, that merchant should always include information of product purchase price in shop currency, and the quantity to add to the stocks. These will affect in stock reports.

---

## 9.4 How to manage stock on a product

1. Decide which products stock you want to manage, find the product in **Products**
2. Open up the product and scroll down for **Stock management** tab

---

**Tip:** Before trying to manage stock on a product make sure, that the Supplier and product has stock setting set as **Stocked**

---

**Add stock:** Input your product purchase price and quantity and select **Add stock** **Remove stock:** Input a negative value of how many products you want to remove, input product purchase price and quantity and select **Remove stock**

---

**Tip:** Your stock physical count, logical count, value per unit and total value is automatically updated after each time you add or remove stock

---

## 9.5 How to manage stocks in general

1. Navigate to *Stock Management* in shop admin, through the menu **Products / Stock management**
2. Locate the product you want to manage the stock for

---

**Tip:** Before trying to manage stock on a product make sure, that the Supplier and product has stock setting set as **Stocked**

---

**Add stock:** Input your product purchase price and quantity and select **Add stock** **Remove stock:** Input a negative value of how many products you want to remove, input product purchase price and quantity and select **Remove stock**

---

**Tip:** Your stock physical count, logical count, value per unit and total value is automatically updated after each time you add or remove stock

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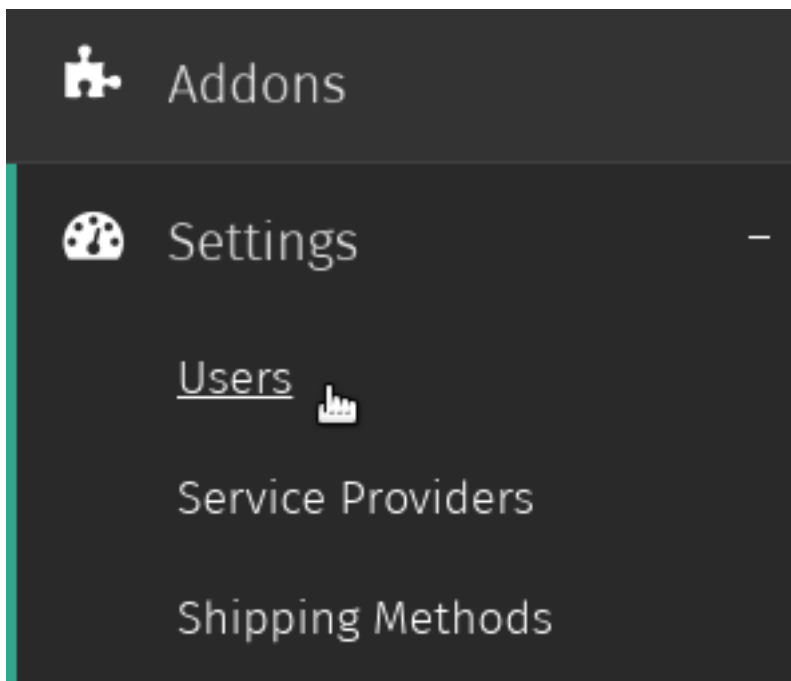
## Customers and Users

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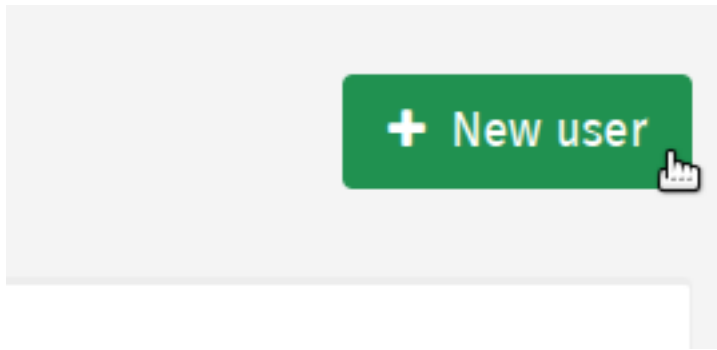
### 10.1 Users

#### 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, then click the *Save* button in the to create the user account.

## User Information

---

Username *	<input type="text" value="new_user"/>
	<small>Required. 30 characters or fewer. Letters, digits and @/./+/-/_ only.</small>
Email address	<input type="text" value="Email address"/>
First name	<input type="text" value="First name"/>
Last name	<input type="text" value="Last name"/>
Password *	<input type="password" value="....."/>

---

**Note:** A user won't automatically receive notice that an account has been created for them.

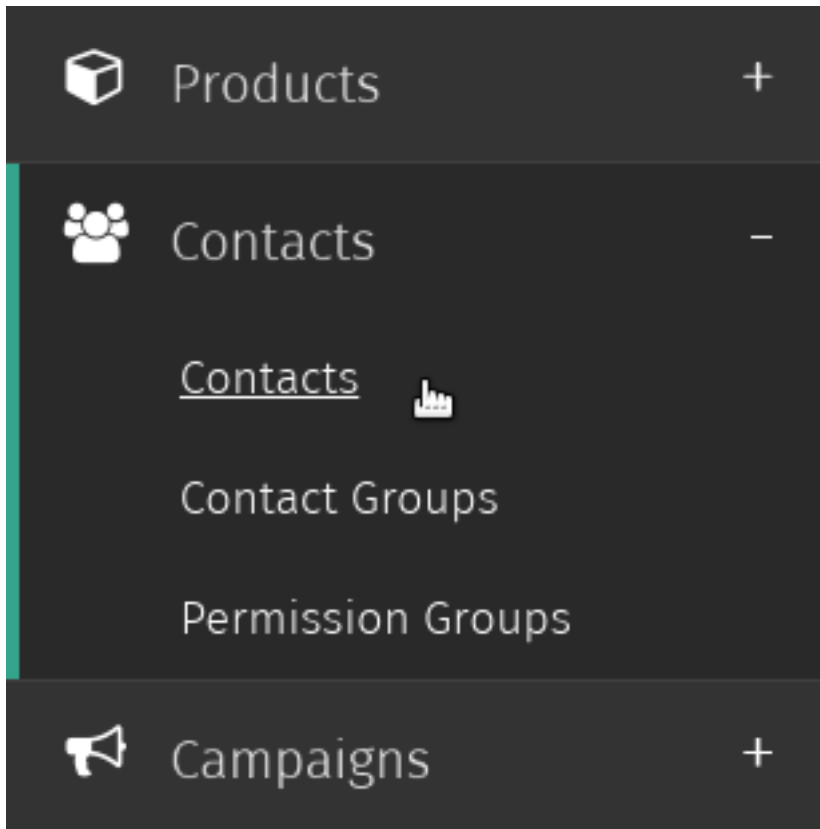
Instead, if you would like to notify a user, send a password-reset email.

See *[Sending Password-Reset Emails](#)*.

---

### 10.1.2 Creating a User From a Saved Contact

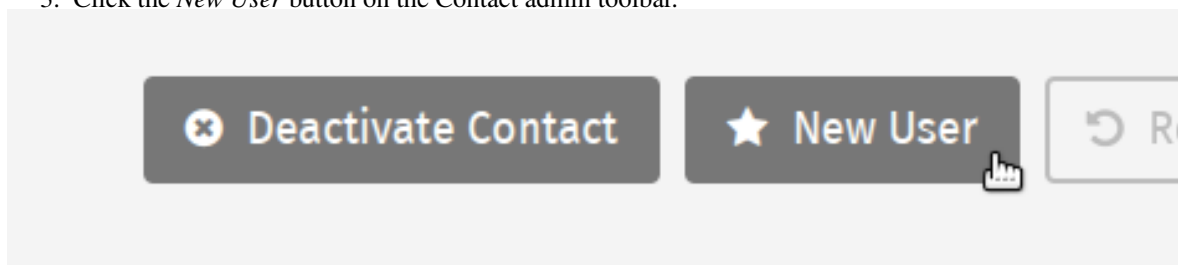
1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



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	
<a href="#">Émilie Dupuy</a>	Person	lemonnier.lucie@noos.fr	0405929976
<a href="#">Stiina Vitikka</a>	Person	kauno24@koistinen.org	+358 41 5068045
<a href="#">Véronique Morin</a>	Person	fguibert@boyer.com	01 07 50 86 70
<a href="#">Mats Ekman</a>	Person	phelgesson@malmqvist.se	08-730 508 11
<a href="#">Kjell Lunde</a>	Person	faasen@eliassenamundsen.net	39010768

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



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.

## User Information

---

Username *	<input type="text" value="new_user"/>
	<small>Required. 30 characters or fewer. Letters, digits and @/./+/-/_ only.</small>
Email address	<input type="text" value="Email address"/>
First name	<input type="text" value="First name"/>
Last name	<input type="text" value="Last name"/>
Password *	<input type="password" value="....."/>

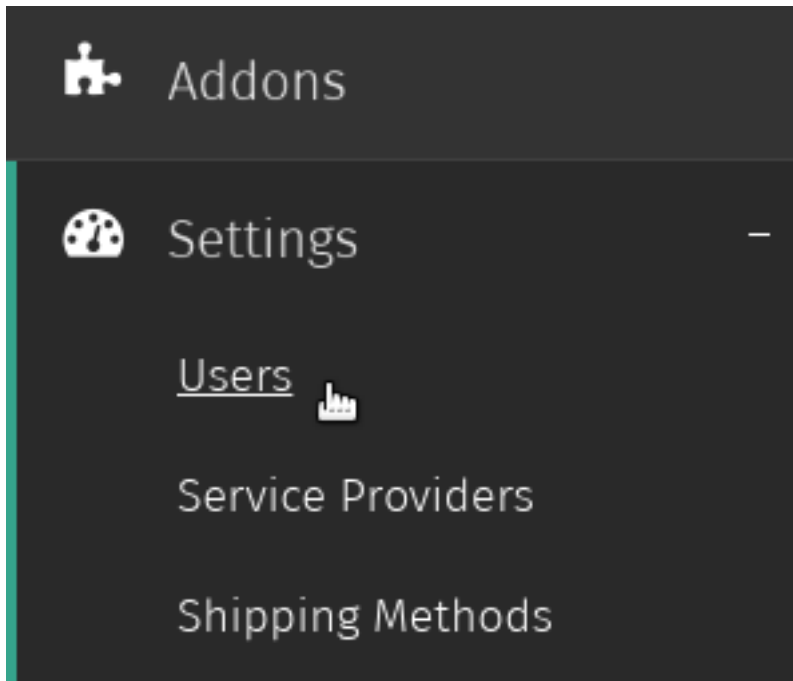
See *Creating a User* for more information.

### 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

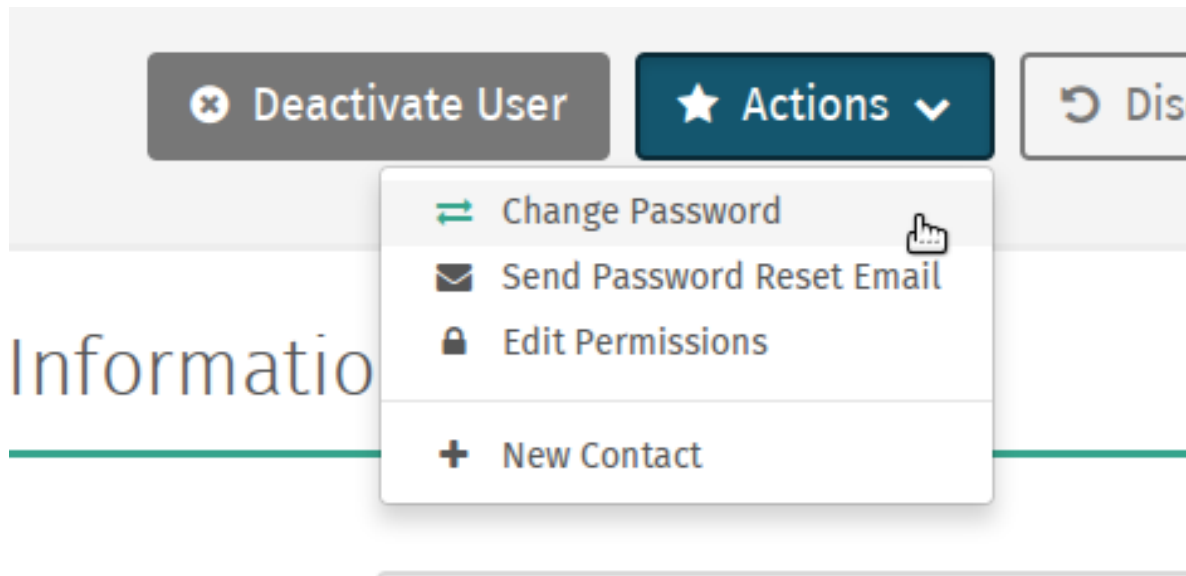




2. Select the user whose password you want to change.

↕ Username	↕ Email	↕ First Name
Filter by Username	Filter by Email	Filter by First Name
admin	admin@shoop.local	
<u>new_user</u>		
new_user_2		

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



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

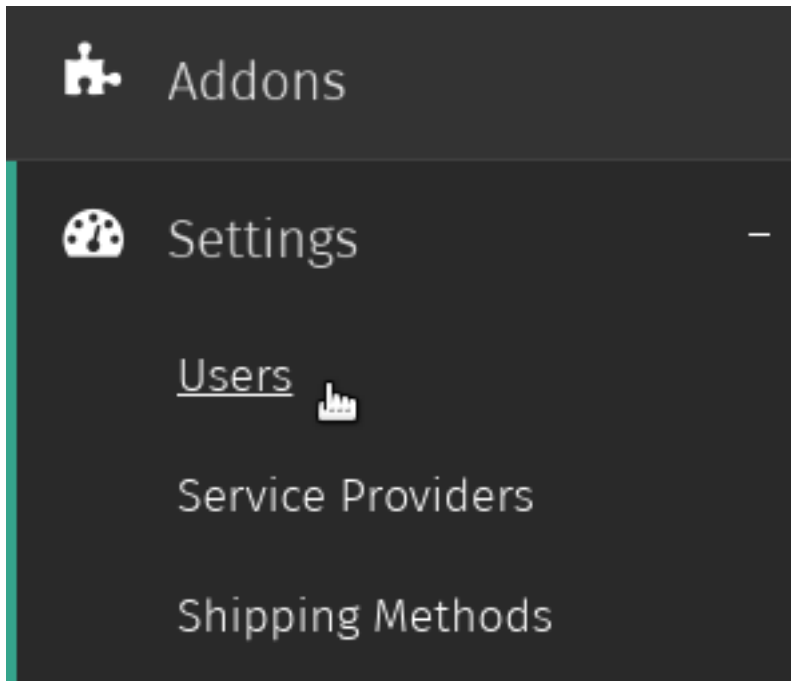
## Change Password

New Password \*

New Password (again) \*

### **Sending Password-Reset Emails**

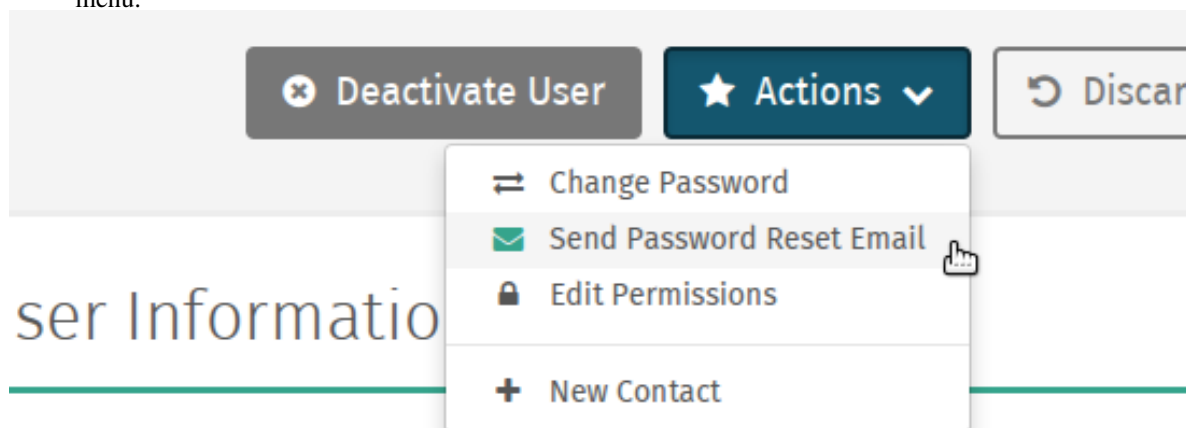
1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.



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

Username	Email	First Name
Filter by Username	Filter by Email	Filter by First Name
admin	admin@shoop.local	
<u>new_user</u>		
new_user_2		

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.

# Reset User Password

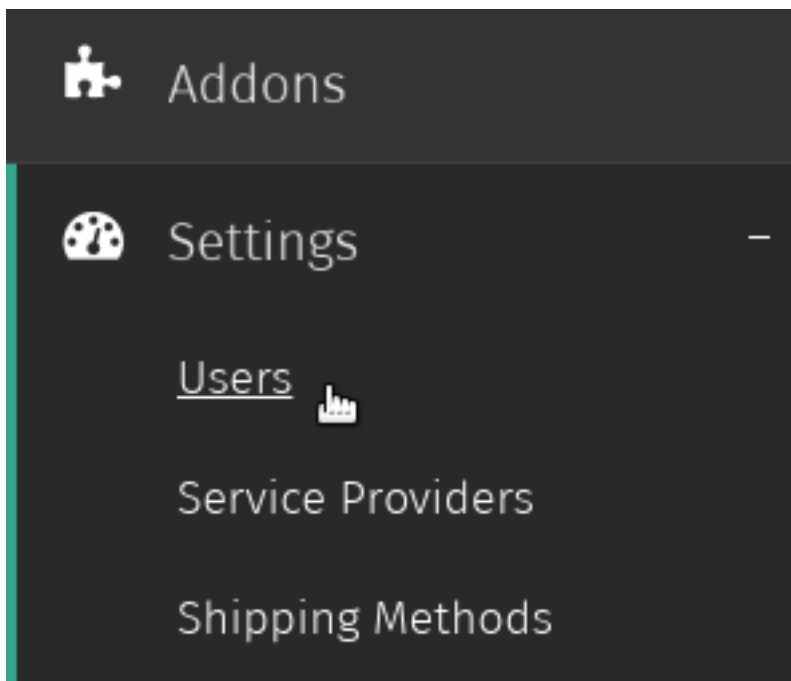
Send a password reset email to ?

 Send Reset Email 

## 10.1.4 Editing User Permissions

**Warning:** Use caution when granting users administrative permissions.

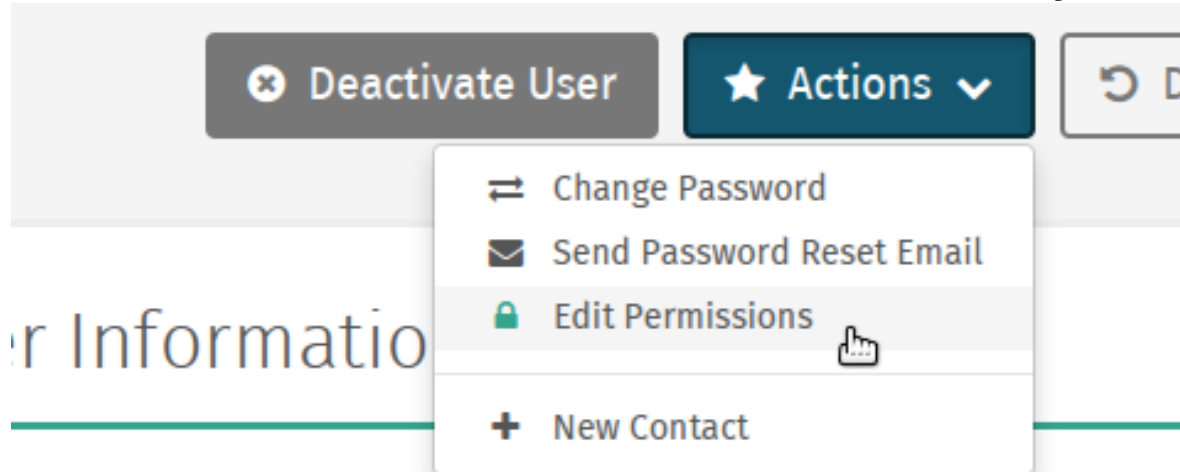
1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.



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

Username	Email	First Name
Filter by Username	Filter by Email	Filter by First Name
admin	admin@shoop.local	
<u>new_user</u>		
new_user_2		

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.

Staff status ☒

Designates whether the user can log into this admin site.

Superuser status ☐

Designates that this user has all permissions without explicitly assigning them.

Permission Groups

Please enter 3 or more characters

### 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.

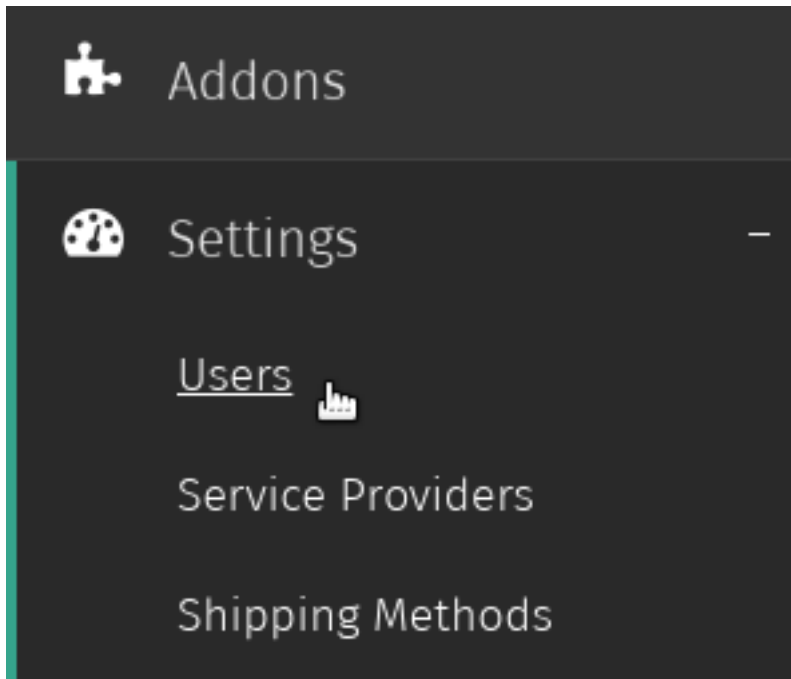
**Note:** If a user has an associated contact, deactivating the user's user account will not deactivate their contact, although it will prevent them from logging in, essentially accomplishing the same thing.

See [Deactivating a Contact](#) for more information.

---

To deactivate a user:

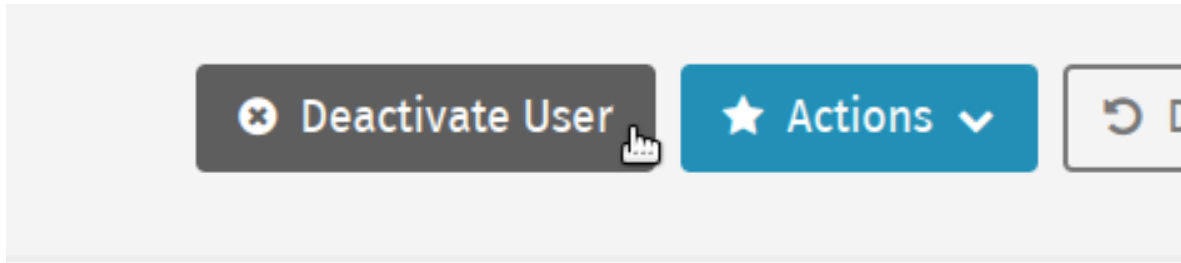
1. Navigate to the Users admin page by clicking *Users* under the *Settings* category from the Shuup Admin menu.



2. Select the user you want to deactivate.

Username	Email	First Name
Filter by Username	Filter by Email	Filter by First Name
admin	admin@shoop.local	
<u>new_user</u>		
new_user_2		

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.

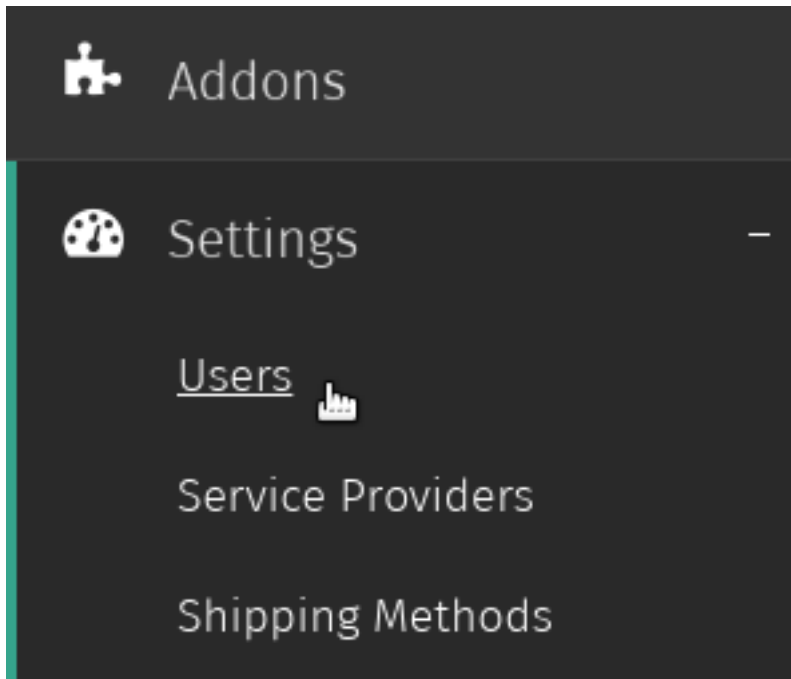
---

### 10.1.6 Logging in as a User


When troubleshooting a problem for a customer, it may be useful to log in under the user's account.

To log in as a user:

1. When logged in as a superuser, 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 log in as.

↕ Username	↕ Email	↕ First Name
Filter by Username	Filter by Email	Filter by First Name
admin	admin@shoop.local	
<u>new_user</u> 		
new_user_2		

3. Click the *Login as User* button on the user admin toolbar.



4. You will now be logged in as the user.

---

**Note:** If a superuser places an order as another user, the superuser will be listed as the creator on the orders details page.

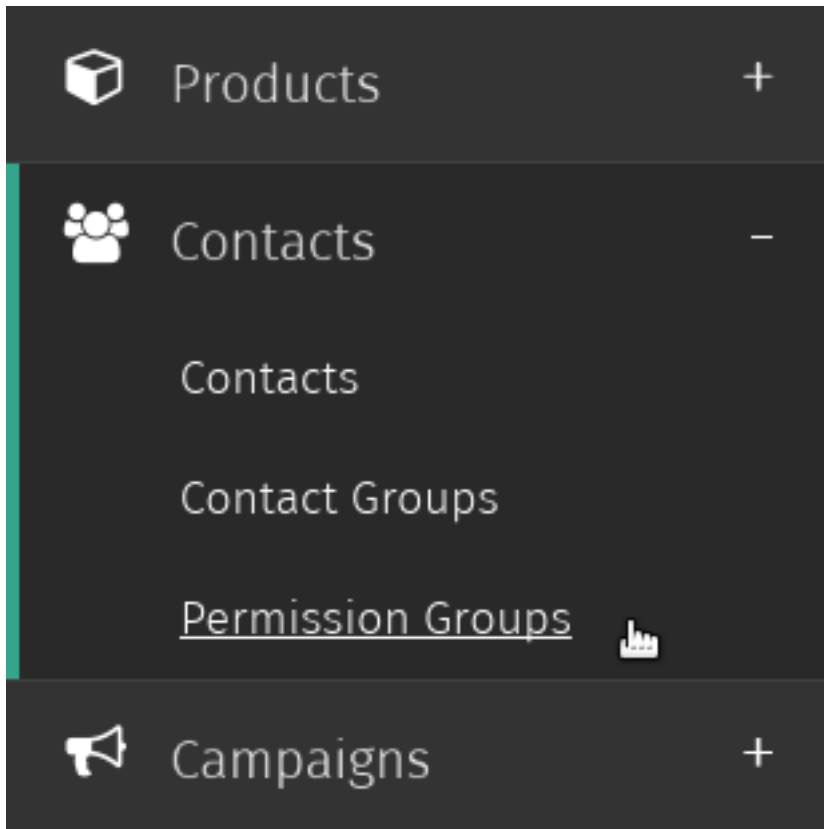
---

## 10.2 Permission Groups

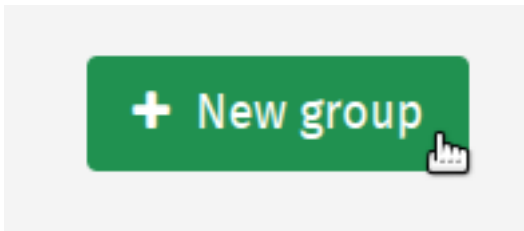
Permission groups can be used to restrict access to different sections of the Shuup admin for staff-level users.

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





2. Click the *New group* button on the Permission Group admin toolbar.



3. Enter a name for the group, select any modules (or admin sections) the group should have access to, and select any users that should be members of this group.

Name \* Sales Representatives

Module Permissions

- \*Orders
- Notifications
- Orders
- Payment Methods
- Permission Groups
- Product Types
- Products

Members

---

**Note:** Permissions are managed on a module-level basis. For example, if a user has access to the Orders module, they will have access to create orders, shipments, payments, refunds.

Additionally, if two admin modules require the same permission rights, adding one module will automatically add the second once the group settings have been saved.

---

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

## 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.

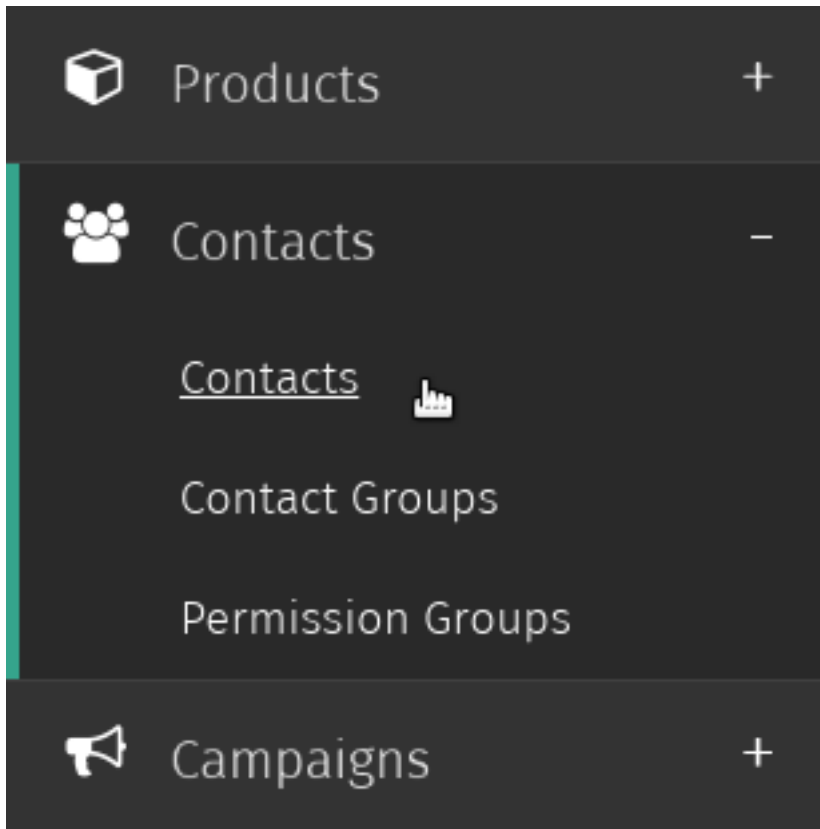
One or more person contacts may be *members* of a company contact.

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.

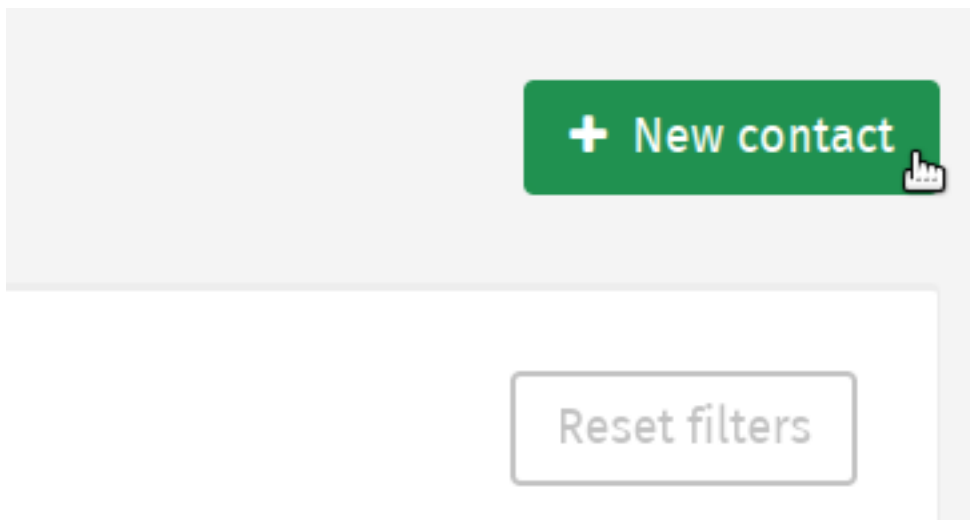
If a user's person contact is linked to a company, the company's contact information will be used when placing orders.

### 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 contact* button on the Contacts admin toolbar.



3. Enter all basic details for the contact, including any required fields.

## Basic details

---

Type *	<input type="text" value="Person"/>
Contact Groups	<input type="checkbox"/> Default <input type="checkbox"/> Anonymous Contacts <input checked="" type="checkbox"/> Person Contacts <input type="checkbox"/> Company Contacts
Name *	<input type="text" value="Captain Shuup"/>
First name	<input type="text" value="Captain"/>
Last name	<input type="text" value="Shu"/>
Name extension	<input type="text" value="Name extension"/>
Email	<input type="text" value="Email"/>
Phone	<input type="text" value="Phone"/>

---

**Note:** If adding a contact of type *Person*, the *Name* field is required but unused. Instead, you will want to enter a temporary value into the *name* field and (optionally) provide the contact's first name last name.

If adding a contact of type *Company*, the *Name* field is required and will be used as the company name. In this case, the first and last names will not be used.

---

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

## Addresses

### Billing Address

Name	<input type="text" value="Captain Shuup"/>
Name prefix	<input type="text" value="Name prefix"/>
Name suffix	<input type="text" value="Name suffix"/>
Street	<input type="text" value="123 Fake"/>
Street (2)	<input type="text" value="Street (2)"/>
Street (3)	<input type="text" value="Street (3)"/>

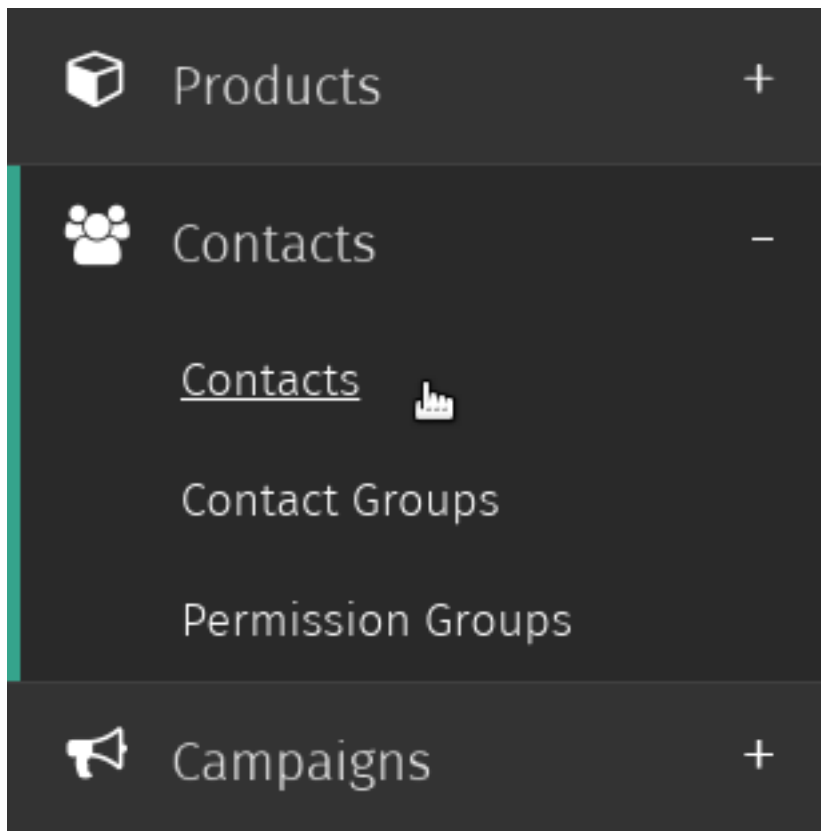
### Shipping Address

Name	<input type="text" value="Name"/>
Name prefix	<input type="text" value="Name prefix"/>
Name suffix	<input type="text" value="Name suffix"/>
Street	<input type="text" value="Street"/>
Street (2)	<input type="text" value="Street (2)"/>
Street (3)	<input type="text" value="Street (3)"/>

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

### 10.3.2 Editing a Contact

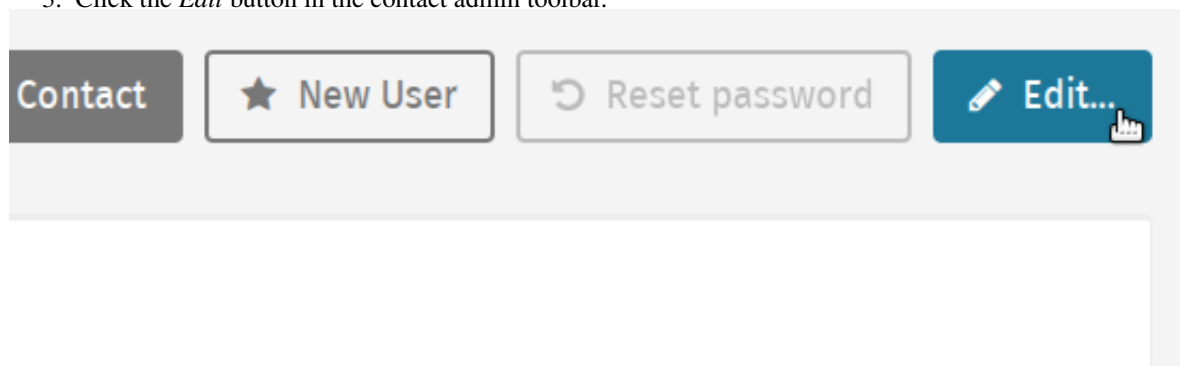
1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



2. Select the contact that you want to edit.

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

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

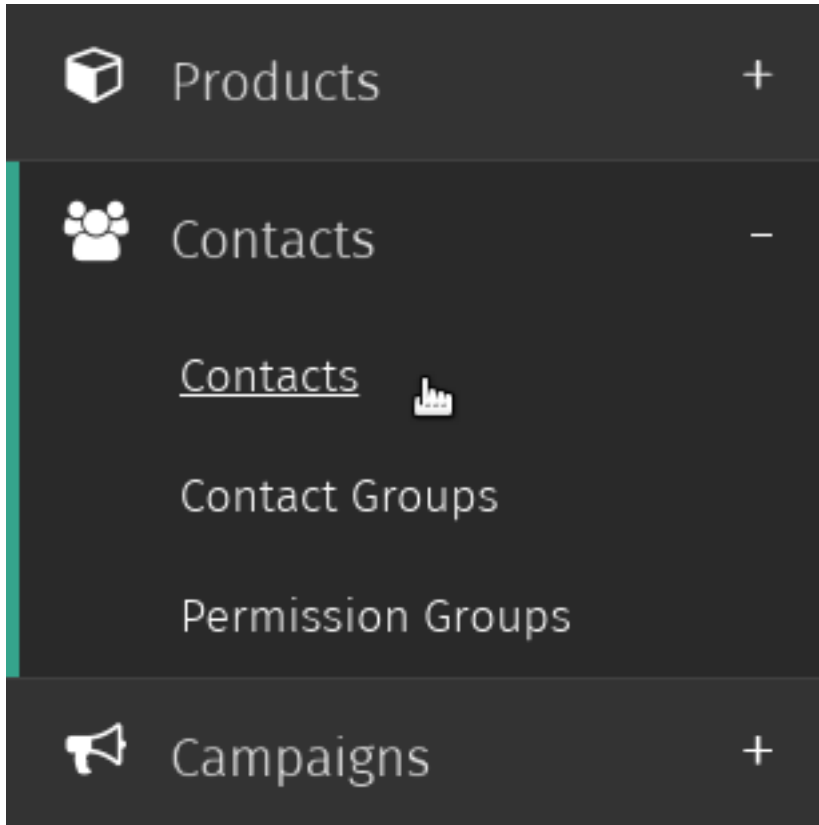


3. Edit the user's information and click *Save* to save the contact's information.

See *Creating a Contact* for more information.

### 10.3.3 Editing Company Membership

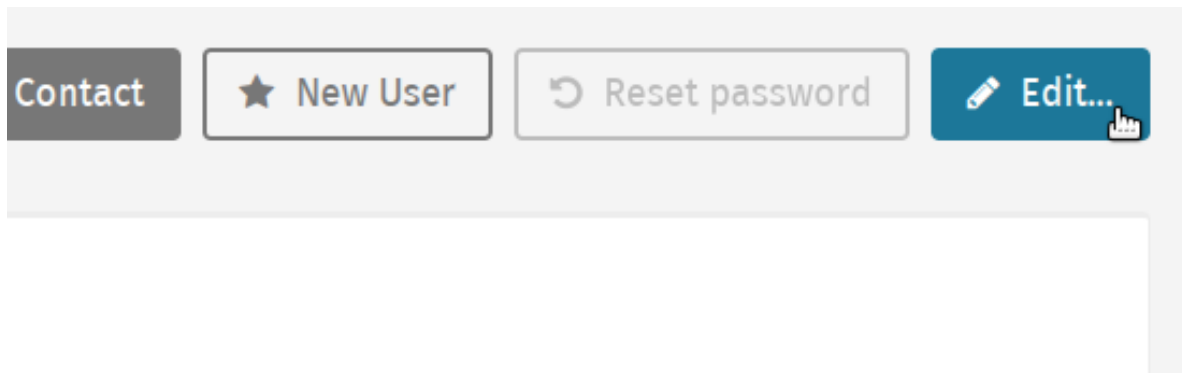
1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



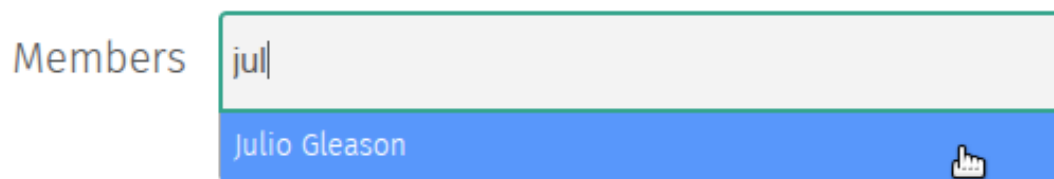
2. Select the company contact whose membership you want to edit.

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
<u>Your Company, Inc.</u>	Company	yourcompany@shuup.com		yes

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



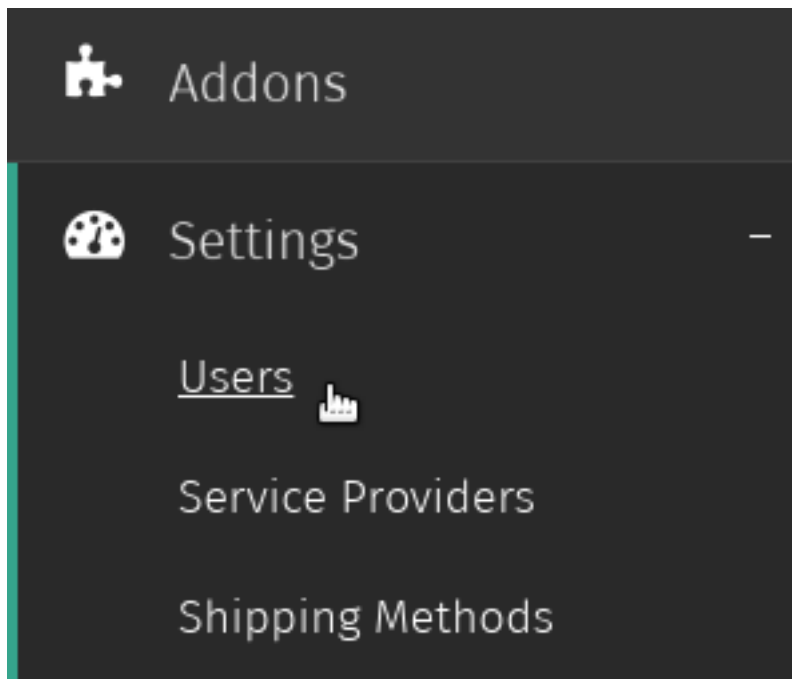
4. Under the *Members* field input, type the name of the person contact you wish to add to the company. When the name appears in the dropdown, click to add to the input field.



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.

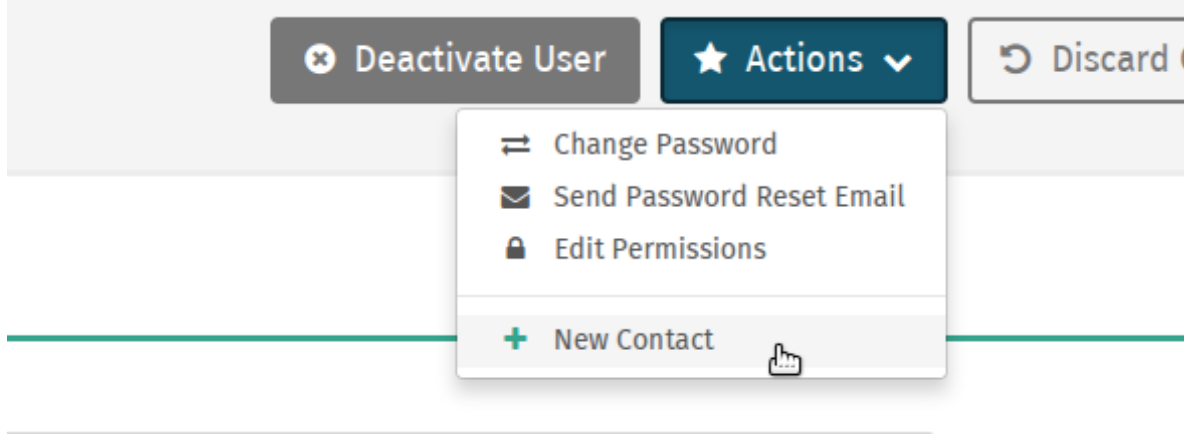


2. Select the user whose permissions you want to edit.



Username	Email	First Name
Filter by Username	Filter by Email	Filter by First Name
admin	admin@shoop.local	
<u>new_user</u>		
new_user_2		

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.

## Basic details

---

Type \*

Contact Groups ☐ Default  
☐ Anonymous Contacts  
☒ Person Contacts  
☐ Company Contacts

Name \*

First name

Last name

Name extension

Email

Phone

See [Creating a Contact](#) for more information.

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.

---

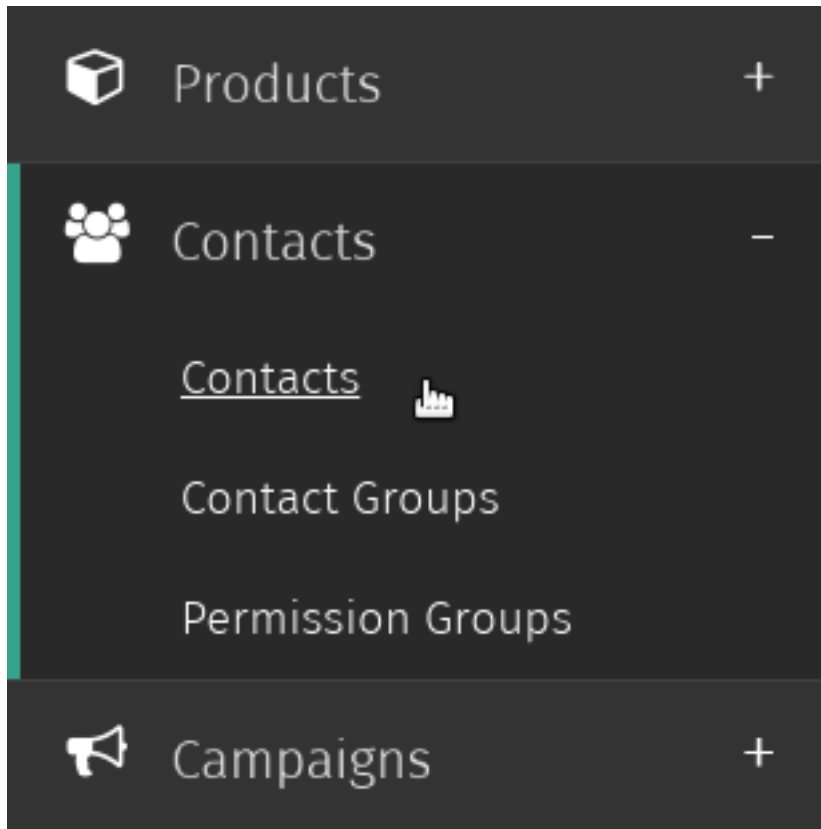
**Note:** If a contact has an associated user, deactivating the user's contact will not deactivate their user account, although it will prevent them from logging in, essentially accomplishing the same thing.

See [Deactivating a User](#) for more information.

---

To deactivate a contact:

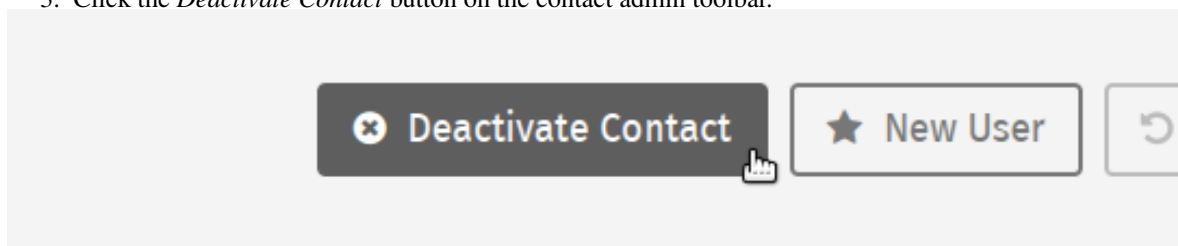
1. Navigate to the Contacts admin page by clicking *Contacts* under the *Contacts* category from the Shuup Admin menu.



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	
<a href="#">Émilie Dupuy</a>	Person	lemonnier.lucie@noos.fr	0405929976
<a href="#">Stiina Vitikka</a>	Person	kauno24@koistinen.org	+358 41 5068045
<a href="#">Véronique Morin</a>	Person	fguibert@boyer.com	01 07 50 86 70
<a href="#">Mats Ekman</a>	Person	phelgesson@malmqvist.se	08-730 508 11
<a href="#">Kjell Lunde</a>	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.

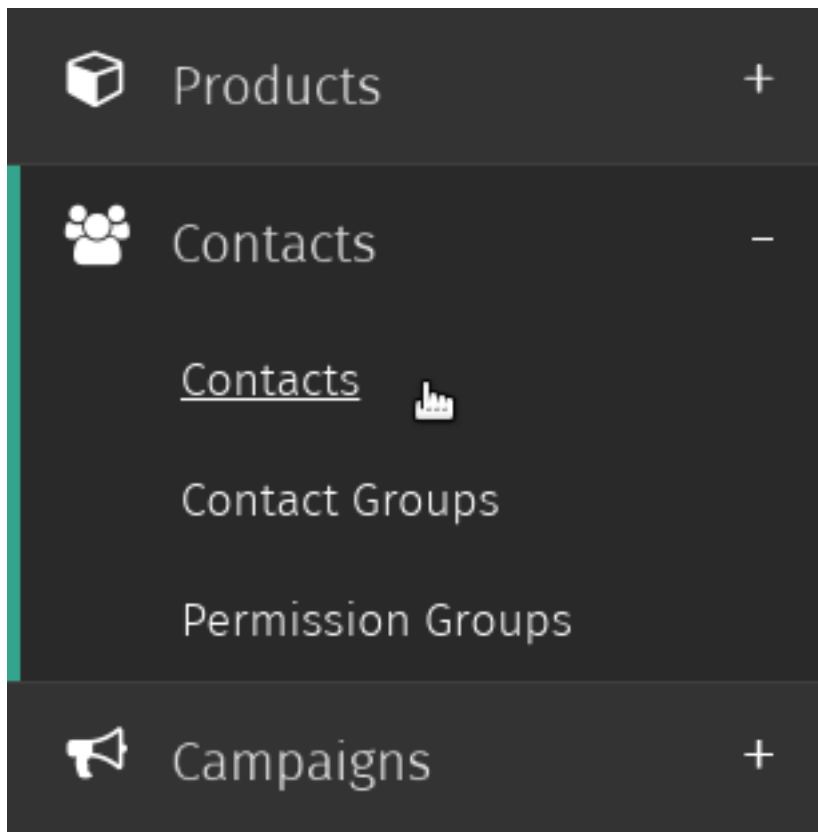
---

## 10.4 Contact Groups

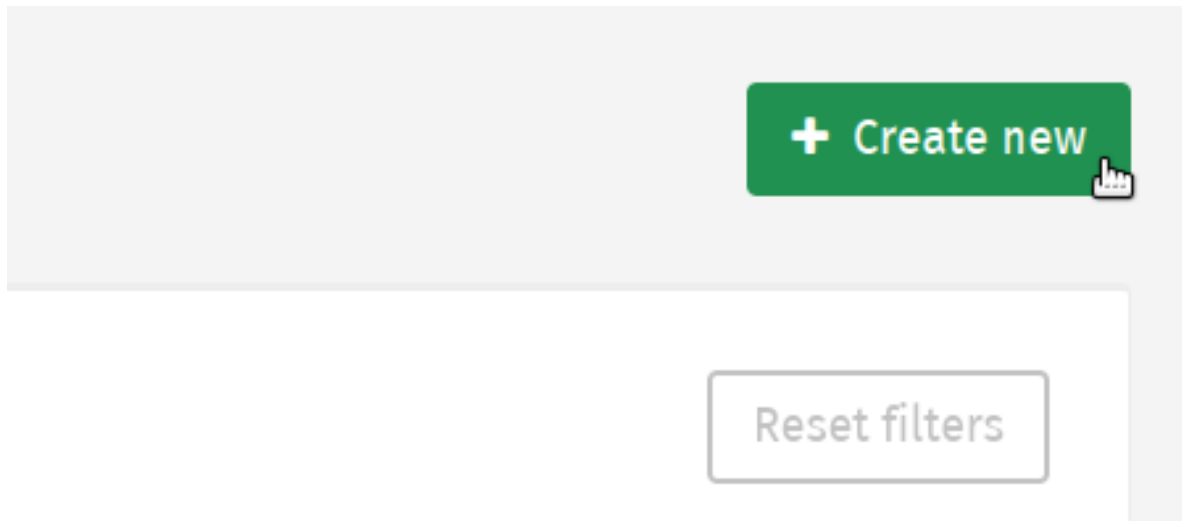
In Shuup, contacts can be placed into different contact groups. These groups can then be targetted for campaigns, discount pricing, or custom behaviors.

### 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 and price-display mode for your contact group.

### General information

English Finnish Japanese zh-hans pt-br

Name [English] \* Bronze Customers

Price display mode \* show pre-tax prices

4. Click the *Save* button to save your contact group

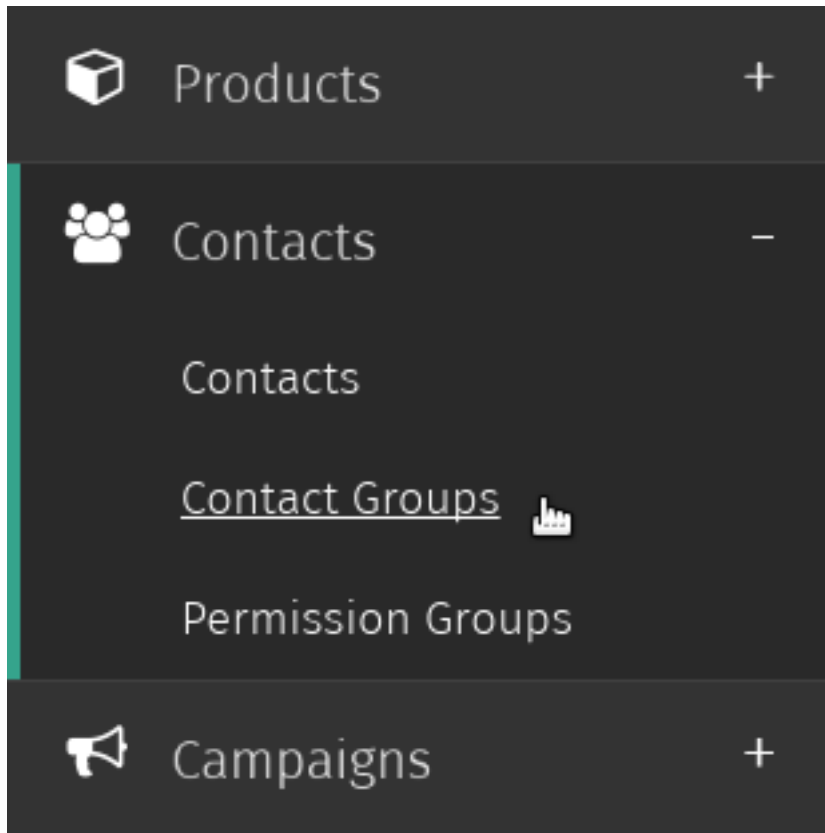
Once the contact group has been saved, two new tabs will be automatically added to the group's admin page—a *Members* tab and one or more *Sales Range* tabs.

## 10.4.2 Editing Group Membership

### View Contact Group Membership

#### Adding a Contact

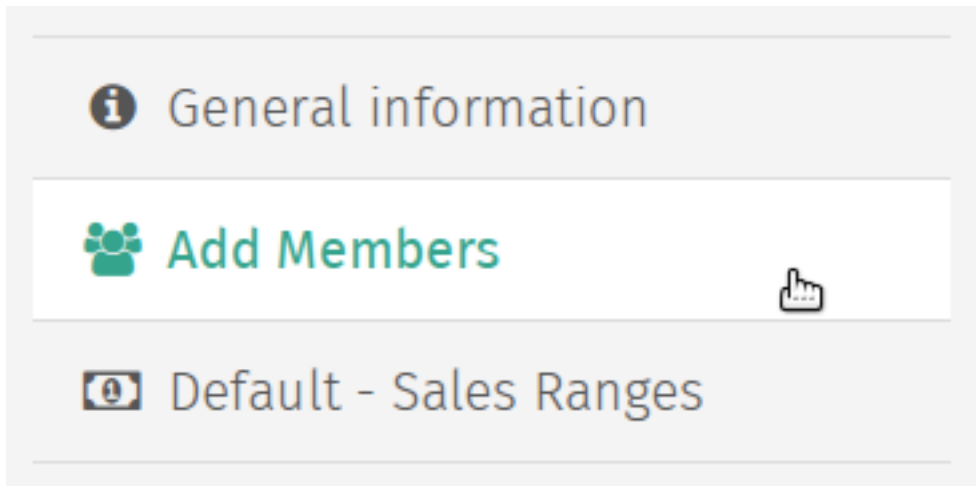
1. Navigate to the Contact Groups admin page by clicking *Contact Groups* under the *Contacts* category from the Shuup Admin menu.



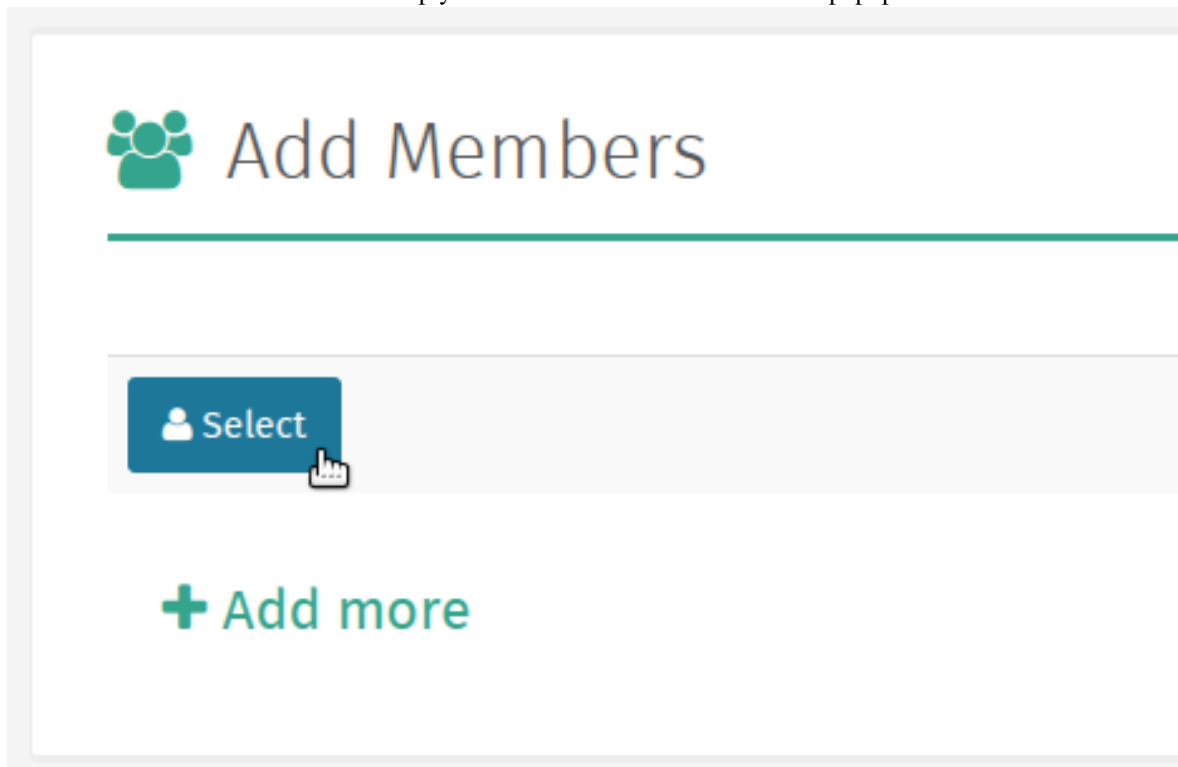
2. Select the contact group whose membership you want to edit.

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

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



4. Click the *Select* button on an empty row to launch the Contact selector popup.

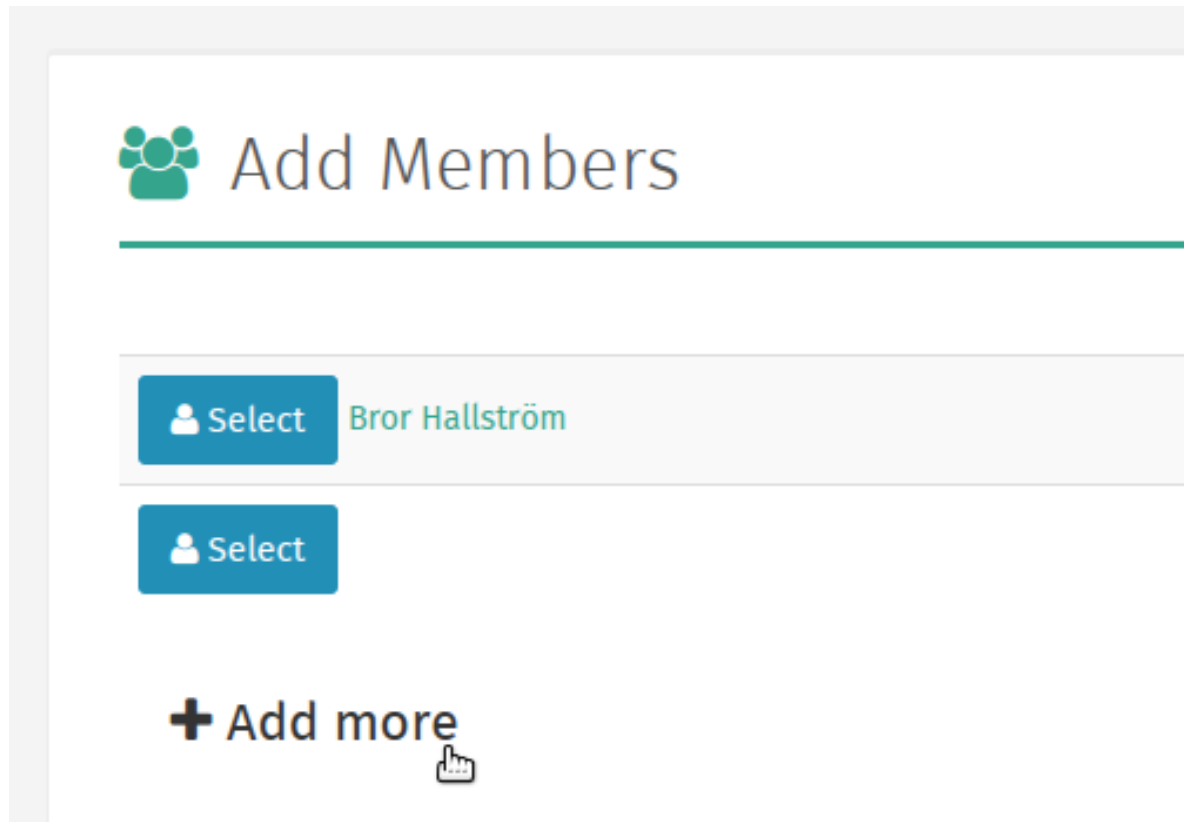


5. Select the contact you want to add from the Contact popup selector.

↕ Name	Type	↕ Email
Filter by Name		Filter by Email
	Person	admin@shoop.local
<u>Émilie Dupuy</u>	Person	lemonnier.lucie@noos.fr
Stiina Vitikka	Person	kauno24@koistinen.org
Véronique Morin	Person	fguibert@boyer.com
Mats Ekman	Person	phelgesson@malmqvist.se
Kjell Lunde	Person	faasen@eliassenamundsen.net
First Name Last	Person	
Sham Humyhorn	Person	

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.

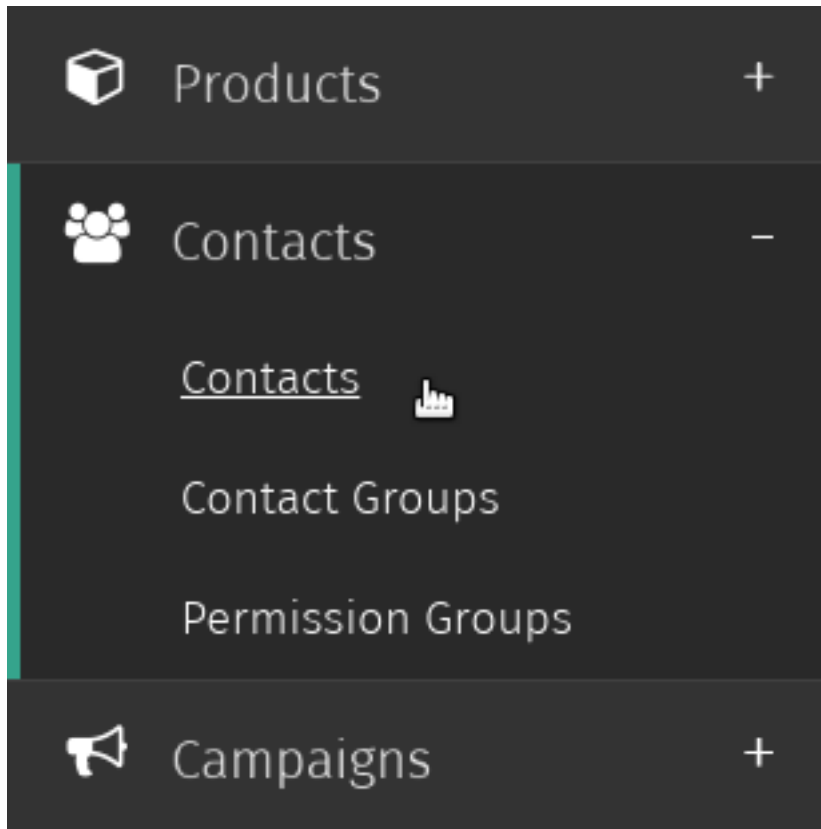
### Removing a Contact

---

**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	
<a href="#">Émilie Dupuy</a>	Person	lemonnier.lucie@noos.fr	0405929976
<a href="#">Stiina Vitikka</a>	Person	kauno24@koistinen.org	+358 41 5068045
<a href="#">Véronique Morin</a>	Person	fguibert@boyer.com	01 07 50 86 70
<a href="#">Mats Ekman</a>	Person	phelgesson@malmqvist.se	08-730 508 11
<a href="#">Kjell Lunde</a>	Person	faasen@eliasseamundsen.net	39010768

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

## Basic details

---

Active ☒

Contact Groups ☐ Default  
☐ Anonymous Contacts  
☒ Person Contacts  
☐ Company Contacts  
☒ Elite Customers

First name

Last name

Name extension

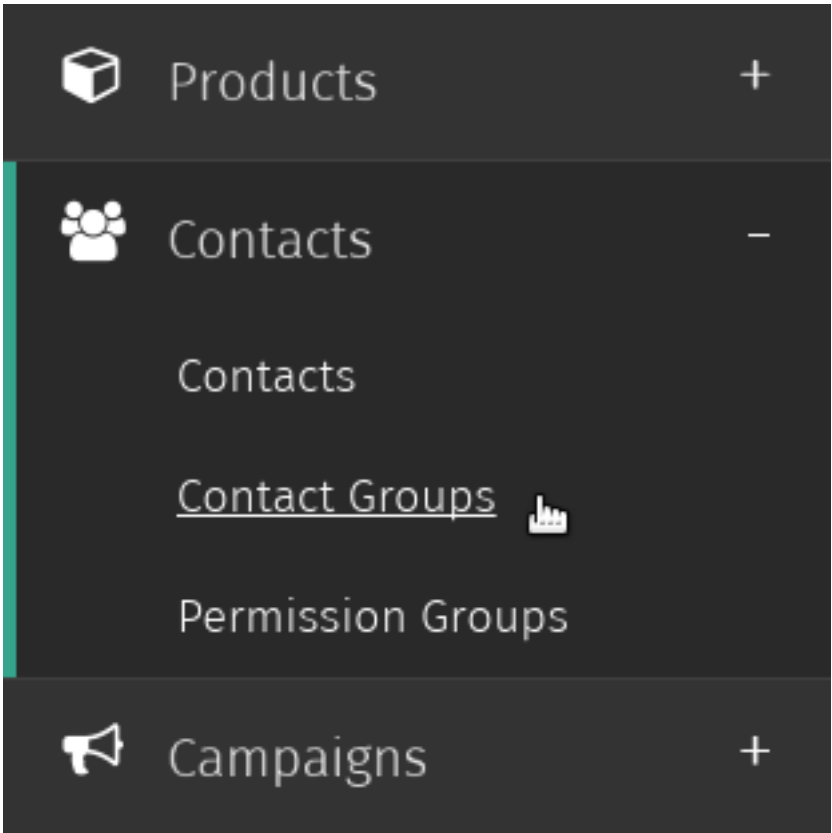
4. Find the contact group whose membership you wish to edit in the *Contact Groups* list, uncheck the corresponding box, and click *Save* to update the contact's group membership.

### 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.

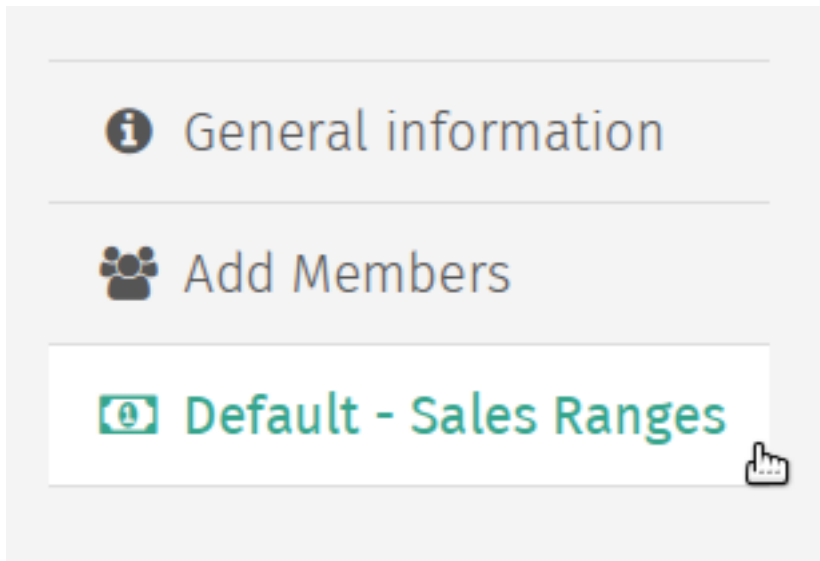
1. Navigate to the Contact Groups admin page by clicking *Contact Groups* under the *Contacts* category from the Shuup Admin menu.



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.

## Default - Sales Ranges

---

Customers within this sales range are assigned to this contact group.

Minimum value



Maximum value

Leave empty for no maximum

---

**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.

---



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## Reports and Analytics

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Feature coming soon!





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## Addons

---

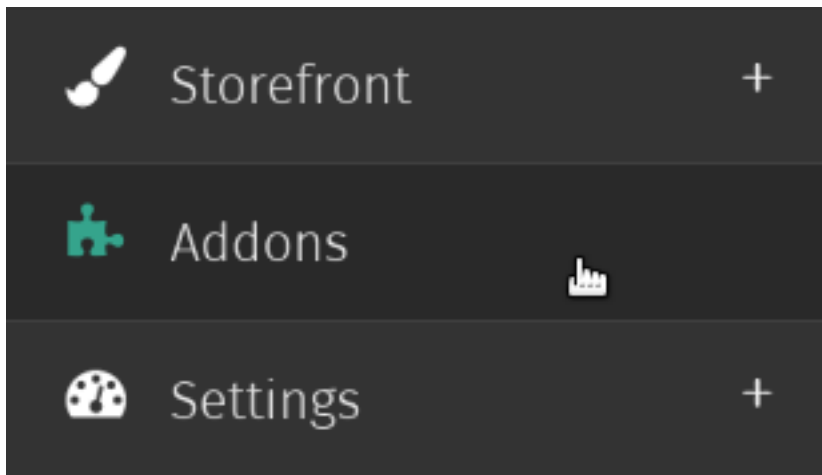
### 12.1 Installing Addons

---

**Note:** Uploading addons is currently disabled in the Cloud version of Shuup.

---

Addons are installed through the Addons admin. To navigate to the Addons admin, select *Addons* from the Shuup Admin menu.



Any installed addons will be listed on this page.

To upload an addon, click *Upload new addon* on the Addon toolbar.

---

**Note:** Addons must be uploaded in .zip format

---

Next, upload the addon by selecting the .zip file with your file selector and clicking the *Upload* button.

## Select file

Addon file (ZIP) \*  No file chosen  
Only upload addon files you trust.

Once the file has been uploaded, you will be able to view any package information as well as a list of the uploaded file contents.

Next, click *Install Addon* to install the addon. This will take you to a page stating whether or not the installation was successful, and if it was unsuccessful it will display more information about the error.

**Tip:** When troubleshooting installation issues, it helps to copy and paste the error/traceback information.

You should be taken back to the Addon admin page, and unless there were problems uploading your file it should be included in the list of installed addons. However, it will not yet be enabled.

## 12.2 Enabling Addons

After an addon has been installed, it must be enabled. To enable an installed addon, check the *Is enabled* column next to the addon name and click *Save addon changes* on the Addons toolbar.

Home / Addons

## Addons

### Installed addons

Addon name	Is enabled
Custom_addon_1	<input checked="" type="checkbox"/>
Custom_addon_2	<input checked="" type="checkbox"/>
Custom_addon_3	<input type="checkbox"/>

If changes were made to the list of enabled/disabled addons, the server must be reloaded and a *Reload application* button will appear on the Addons admin toolbar.

**Warning:** When you reload the application server, it may take some time for the new instance of your application to properly initialize.

In addition, there is always a chance for the server to not properly initialize at all, in which case you may need to troubleshoot the problem yourself (or have a system administrator handy).

Clicking this button will take you to the Reload Application Server page, where the server can be reloaded by pressing the *Reload Application Server* button.



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## Indices and tables

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- `genindex`
- `search`