amasty

Magento Tutorial Guide

Magento Tutorial

E-commerce is an enormous business sphere that includes not only a solid understanding of the main selling principles but also requires a powerful platform to sell with. The success of the business directly depends on the webstore and how customers can use it. Thus, merchants have to face multiple challenges starting with choosing the software and ending with specific store settings. Let's find out how to set up a successful business by learning a top-rated Magento 2 platform from scratch.

Magento Overview

Before starting our step-by-step tutorial for Magento 2 beginners, let's learn what it is and why vendors prefer this platform to others:

- Magento vs. Shopify
- Magento vs WordPress
- Magento vs WooCommerce

What Is Magento?

In a few words, Magento is one of the most widespread open-source platforms that merchants can use to sell their products and services online. From the technical point of view, it is based on the Zend Framework of PHP language. From the business side, it has all the needed options for B2C and B2B commerce: Community/Enterprise versions and Cloud.

Why Magento?

The main reason for being a top-rated source (apart from being open-source software, of course) is that Magento architecture, interface and performance are extremely flexible and can be easily adjusted according to particular needs. The most significant advantages are:

- Easy and flexible configuration
- Intuitive interface for content management
- Stability even with 100.000+ products
- Magento compatibility with the most demanded third-party systems
- Built-in SEO features
- Mobile-friendly structure
- A wide choice of Magento extensions

Let's get started and proceed to the Magento tutorial block which helps to install the software.

Installation

First of all, you need to check the requirements needed for a successful running of an application.

There are several steps to get the platform installed:

- Configure your server environment
- Get the Magento software
- Install the software using either the Web Setup Wizard or command line
- Check the result!

What you may need further:

- How to apply additional extensions
- Install extensions via Composer
- Remove unnecessary extensions
- How to upgrade Magento version
- M2 migration plan

Store Setup

When the installation is ready, you may proceed to the store configuration. As a merchant, you need to pass through all steps of the Magento 2 tutorial for a store setup attentively in order to build a maximally profitable webstore. See a complete M2 Admin Panel tutorial to study your backend navigation and start using it properly.

Step 1. Create your websites/store views

Of course, the main goal of any merchant is to make their brand popular in as many countries as possible. With Magento features, it is possible to create multiple websites and store views for customers from all over the world. Go Multiple Stores Setup guide for detailed instructions on store views settings.

Also, if you need to provide your potential customers with the store views in particular languages, see our language switcher guide.

What else? Check here:

- Redirect shoppers to the appropriate store view
- Configure the general store information, e.g. your logo
- Apply a custom theme
- Use UI components

Step 2. Supply your store with inventory

When all stores and views are ready, it's time to connect an online selling platform with the real inventory. Manage stocks and learn more about the configuration.

Meanwhile, Magento allows connecting backend settings with several warehouses and stocks in no time. To get a full set of inventory management options, view the Advanced MSI extension.

Advanced options to think over beforehand:

- Notify users and store admins about out-of-stock products

Step 3. Set permissions for your team

Obviously, you have your own team for appropriate website management. In most cases, employees are responsible for different tasks. Thus, to improve security and avoid mistakes at the very beginning, you need to limit their permissions for particular parts of the backend. Go to **System → Permissions → All Users** to add new backend users and proceed to User Roles to adjust their permissions.

If you intend to have an extended multi-level team, we recommend applying an Advanced Permissions extension.

Also, do the following:

- Set permissions for development modes
- Log all admin activities

Step 4. Improve security level

To keep a store stable, you need protection from spam and bots. Easily do it by applying a Google Invisible reCaptcha extension.

Also, if you are going to sell in the European Union, make sure your future store is in compliance with the must-have GDPR requirements.

See how your Magento store can reach GDPR compliance
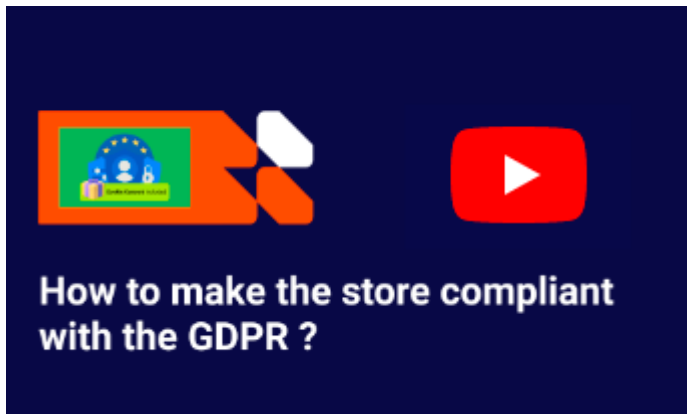
To check if your store is maximally protected, run a security scan to test the security level.

Content management

Now you can proceed to filling the site by creating appealing and useful content for your customers. And, of course, you need to add products that you are going to sell. Let's see how the Magento 2 tutorial for beginners can help.

Step 1. Adjust categories

First of all, navigate to **Catalog → Categories**. Here you can see all existing categories and add new ones (root categories and subcategories).

Want more flexibility? Check the following:

- How to change the category sort order

Step 2. Upload products

Now you can begin to fulfill your store with products. Proceed to **Catalog → Products**. Magento allows you to create items of various types, but all of them have their own peculiarities.

All you need to know:

- How to add a configurable product
- How to automate simple product creation
- What are product statuses and why do you need them
- Add featured products to your storefront
- Make products updating faster with mass actions
- Configure product grid if you intend to create a large catalog

Want to sell more? Find the solution here:

- Link your admin panel to the popular selling platforms

- Display up-sells and cross-sells
- Highlight special offers with labels

Also, check our video tutorials for Magento 2 modules to sell via popular platforms and configure related products display.

Watch the guide - get your prod feeds verified by Google on the first try:
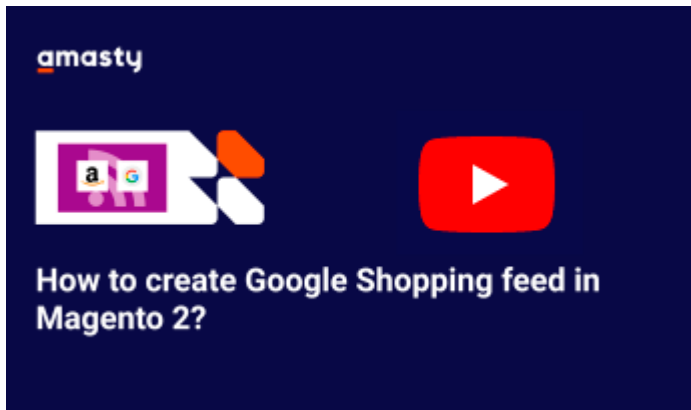
Check the video guide to learn how to create a new related product rule step-by-step
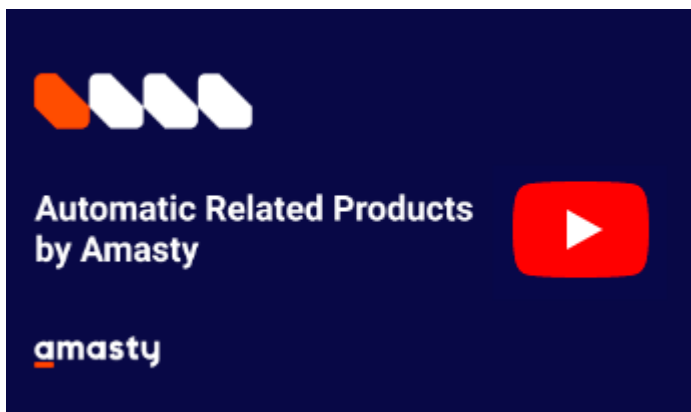
Step 3. Add CMS pages

Obviously, your store cannot consist only of products - you need to create some pages where shoppers will find all the needed info. It has a positive effect on customer decision-making and on SEO rating as well. So, let's see where to find CMS pages in the Magento tutorial.

Click **Content → Elements → Pages** to add useful CMS pages to your webstore.

What else you may need:

- Customize CSS to create your store design
- Add contact forms to keep in touch with clients
- Create extra blog spaces with valuable info
- Integrate FAQ section

amasty

Step 4. Configure search options

When customers come to a store, first of all, they start to search for the needed product. If a website is not optimized, they will just leave. Thus, now let's check how to make it extremely convenient for users.

- Install the Elasticsearch engine
- Configure the advanced searching options
- Extend filtering functionality
- Make your menu maximally appealing

See this video tutorial of Magento menu creation without developers.

Use the video guide to set up a basic mega menu
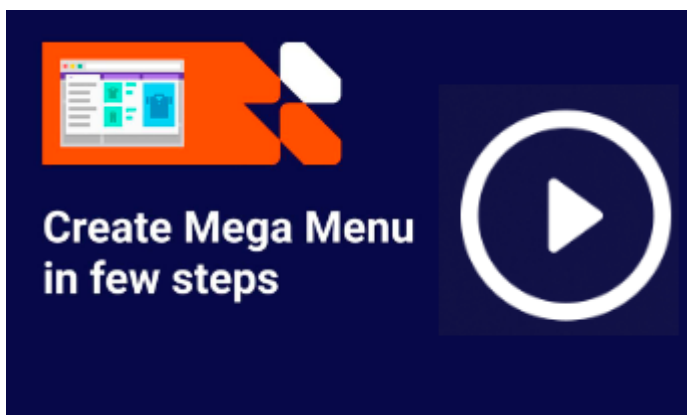
Sales configuration

When your site is ready to sell, it's time to make sure your products will bring revenue and will be successfully shipped to your customers. In this part of Magento 2 basic tutorial, you will find out how not to miss any good deal because of technical issues.

Step 1. Configure payments

Payments in online stores may cause lots of trouble if they are not adjusted properly. To see what Magento offers out of the box, navigate to **Stores → Configuration → Sales → Payment Methods**. Check Payment Settings Guide to configure them properly.

Also think about:

- Applying flexible payment restrictions
- Providing customers with offline payment options

Step 2. Create a shipping strategy

If a payment has been processed successfully, the next step is to ship the order products to customers. Find available shipping methods in **Stores → Configuration → Sales → Shipping Methods**. Make sure you've configured everything correctly in this checklist.

Probably, the methods and rates that are provided out of the box will not be enough, if you want to sell in several locations and still make a profit. What can be done to reduce delivery costs:

- Set custom shipping table rates
- Adjust shipping rules
- Set delivery restrictions

Keep in mind that delivery settings can be tricky. These guides will help:

- Ultimate shipping guide
- Urgent answers about table rates

Step 3. Adjust taxes

Unfortunately, each country and region has its own legislative regulations concerning taxes. You may adjust them in the **Stores → Taxes** section. See how to set up the appropriate tax rules.

Marketing

Now everything is ready for store functioning, and you may proceed to product promotion. To boost sales, store admins can use multiple options and strategies. See what exactly you can use in this marketing tutorial for Magento 2 open source.

Step 1. Think over your pricing policy

Of course, price is a decisive factor for customers. If it is rather high, you may need some additional way to motivate customers to buy more and increase the average order value. The default functionality allows you to create basic special offers with the help of cart price rules.

5 proven ways to build a maximally beneficial selling strategy that merchants use:

- Grow sales with multiple special promotions
- Increase the average order value by granting free gifts
- Boost seasonal revenue with gift cards
- Highlight special offers with promo banners
- Increase customer retention by thanking users with reward points

Configure advanced promo rules with this video tutorial for Magento 2 promo extension:

amasty

Easily set a promotion with our **Step-by-Step Video Tutorial**

Step 2. Create your email strategy

Another way to convert new traffic into regular customers is email marketing. The default newsletter functionality you may find in the **Marketing → Communications** section.

What you need to know:

- How to improve the email marketing strategy
- How to set emails based on customer segmentation

And some useful tools to make it more effective:

- Return shoppers with the auto dispatch of triggered abandoned-cart emails
- Trigger follow-up emails based on various event

Step 3. Make your store trustworthy

The customers' decision-making process consists of multiple aspects, and the trust to a brand is one of them. They are used to take other users' experience and feedback into account. As a merchant, you need to engage customers and build trustworthiness. The easiest way is to think over your reviews presentation. Check what Magento offers out of the box and how to enable product reviews.

You can also turn reviews into a powerful selling tool using the extended reviews functionality.

SEO

In order to keep business growing, merchants have to work on search engine optimization, as the majority of customers come to a website from organic search. And again Magento provides you with some options to boost the position of a store on a search results page.

Step 1. Set up SEO

First, find out what SEO features are available and how to configure them properly. From this ultimate guide, you will learn how to adjust Magento 2 SEO without development.

Extra info you may need to know:

- How to apply Google Tag Manager
- What can you do to create SEO-friendly URLs
- What is XML Sitemap and why do you need it
- How to configure robots.txt

Step 2. Monitor your SEO progress

To improve your position, first, you need to get a full picture of your traffic: where it comes from, who comes to your web store and why. And the most precise way to measure each aspect is to implement Google Analytics to your admin panel.

Still don't know how to increase the Google crawl rate? Apply a per-page analysis tool and advanced SEO options for rapid growth.

Revenue

And the main step on the way to a successful business is revenue management and tracking. Let's point out the most valuable info you need to keep an eye on.

Step 1. Analyze the effectiveness

As a merchant, you can check the effectiveness of your business in the Admin Panel → Dashboard section. Here the basic reports are collected. View and analyze the general info to make data-driven decisions.

Got some trouble with reporting? Check how to fix errors.

Want to collect more detailed data? Implement the Advanced Reports tool to build a maximally profitable sales strategy.

Step 2. Manage Documents

Another thing for the correct store functioning is documentation. In the Sales tab of the admin panel you can manage Invoices, Shipments, Credit Memos, Billing Agreements and Transactions.

What you may need to know:

- How to customize invoices
- The settings of the order confirmation email
- How to manage orders faster
- The ways to collect and use multiple order attributes

Step 3. Minimize revenue losses and returns

For e-commerce, business losses are unavoidable. But still, you can adjust your selling strategy to minimize it.

These are some effective ways to reduces losses:

- Recover abandoned carts
- Apply an efficient tool to manage returns

Conclusion

To sum up, Magento has rich functionality which is rather simple to configure and manage. On our way for a step-by-step Magento 2 learning, we overviewed the key aspects.

Haven't found needed functionality? Talk to our expert in Magento development and we'll see what we can do for you.

From:
https://amasty.com/docs/ - **Amasty Extensions FAQ**

Last update: **2020/06/15 09:43**