

re retail EVOLVED

Magento Pre-Launch Configuration Checklist

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So you've got a fresh new install of Magento and are ready to start setting it up. If you're new to Magento, the task of configuring your store can feel a bit daunting. There is a lot to be done before you launch - setting up payment methods, sales tax, shipping rates, and more. This document will make sure that you get prepared for launch without any unexpected surprises.

Here are the tasks that need to be finished for most Magento installations before launching your web site.

Note: Check marks (✓) indicate that the task is included in our Professional Magento Installation service.

Installation Tasks

- Enable URL rewrites
- Change the admin address to something other than "admin"
- Use database for sessions

Recommended but Optional

- Create a directory in path/to/magento/app/design/frontend/default that is a copy of path/to/magento/skin/frontend/default/default - name it something easy to remember
- Create a directory in path/to/magento/skin/frontend/default that is a copy of path/to/magento/skin/frontend/default/default - name it the same as the directory created above
- System->Configuration->Design->Themes - Change Templates, Skin, and Layout to the directory name in the steps above
- Set up an hourly cron that runs path/to/magento/cron.php (advanced)
- In path/to/magento/.htaccess, add a rewrite to force non-www addresses to add the www or vice versa (depending on your domain)
- In path/to/magento/.htaccess, uncomment lines to enable content compression
- Replace favicon.ico with your own at path/to/magento/favicon.ico and path/to/magento/skin/frontend/default/[theme name]/favicon.ico
- System->Configuration->Google API->Google Analytics - enable and input your account number (this is definitely worth your while)

Templates: Call Outs and Footer

- Edit path/to/magento/app/design/frontend/default/[theme name]/template/callouts/left_col.phtml to match your content OR comment out the left callout block in path/to/magento/app/design/frontend/default/[theme name]/layout/catalog.xml
- Edit path/to/magento/app/design/frontend/default/[theme name]/template/callouts/right_col.phtml to match your content OR comment out the right callout block in path/to/magento/app/design/frontend/default/[theme name]/layout/catalog.xml

- Edit path/to/magento/app/design/frontend/default/[template name]/template/page/html/footer.phtml - Remove the "Keep Magento healthy" notice (unless you want it there)

CMS

- CMS->Poll Manager - set the sample poll to "Closed"
- CMS->Manage Pages - search for identifier "home"; edit the title and content of the page
- CMS->Manage Pages - search for identifier "about-magento-demo-store"; edit the identifier and content (i.e. "about-my-widget-store")
- CMS->Manage Pages - search for identifier "no-route"; remove references to demo store and remove demo images; adjust content if desired
- CMS->Manage Pages - search for identifier "customer-service"; populate with data specific to your operation - recommend a return policy, shipping policy, and privacy policy at a minimum
- CMS->Static Blocks - edit "footer_links" block to accommodate the new about page identifier (i.e. "about-my-widget-store")

Search Engine Optimization: System->Configuration

- Design->HTML Head - Remove default title
- Design->HTML Head - Put something in Title suffix (i.e. " | My Store")
- Design->HTML Head - Remove default description
- Design->HTML Head - Remove default keywords
- Catalog->Search Engine Optimizations - Set "Use categories path for product URLs" to No
- Web->Search Engines Optimization - Set "Use Web Server Rewrites" to Yes
- Configure Catalog->Google Sitemap to include a sitemap called "sitemap.xml" with a base path of "/"
- Add a robots.txt file in path/to/magento with the contents: "Sitemap: /sitemap.xml"

Checkout (Shipping): System->Configuration

- Shipping Settings->Origin - Change "Country", "Region", "Zip/Postal Code", "City" to match your business
- Shipping Methods - Enable your shipping methods
 - If using Table Rates, make sure to change the "Current Configuration Scope" to the web site that you are configuring so that you can import rates

Checkout (Sales Tax)

- Sales->Tax->Manage Tax Zones & Rates - Add Tax Rates applicable to your storefront
- Sales->Tax Manage Tax Rules - Edit Tax Rule (or delete example and create a new one) to include all of the necessary Tax Zones created above
- System->Configuration->Tax->Tax Classes - Change "Tax Class for Shipping" to the appropriate tax class (optional, only if sales tax applies to shipping)
- Sales->Tax->Manage Tax Rules - If selected Tax Class for shipping is not "Taxable Goods", make sure to create a tax rule that covers the selected tax class

Checkout (Terms and Conditions)

This is not required, but is useful for many businesses.

- System->Configuration->Checkout->Checkout Options - Change "Enable Terms and Conditions" to Yes
- Sales->Terms and Conditions - Add as many Conditions as you would like; don't have too many as your customers will have to check a box for every condition

Checkout (Payment): System->Configuration

- Payment Methods->Saved CC - Change "Enabled" to No; this isn't required, but unless you want to deal with the liability of storing credit card numbers (even encrypted ones), we strongly recommend turning this payment method off
- Payment Methods - Enable / Disable payment methods according to your requirements

Transactional Emails

- System->Transactional Emails->Add New Template - Create templates based on the following existing templates; it is smart to name your new templates based on the template being used so that you can easily refer to it later
 - New admin password
 - New account (if not requiring account confirmation)
 - New account confirmation key (if requiring account confirmation)
 - New account confirmed (if requiring account confirmation)
 - New password
 - New Order
 - New Order for Guest (if allowing guest orders)
 - Order Update
 - Order Update for Guest (if allowing guest orders)
 - New Invoice
 - New Invoice for Guest (if allowing guest orders)
 - Invoice Update
 - Invoice Update for Guest (if allowing guest orders)
 - New Credit Memo
 - New Credit Memo for Guest (if allowing guest orders)
 - Credit Memo Update
 - Credit Memo Update for Guest (if allowing guest orders)
 - New Shipment
 - New Shipment for Guest (if allowing guest orders)
 - Shipment Update
 - Shipment Update for Guest (if allowing guest orders)
 - Newsletter subscription confirmation (if requiring newsletter confirmation)
 - Newsletter subscription success
 - Newsletter unsubscription success
 - Share Wishlist

- Send product to a friend
- Product stock alert (if allowing users to sign up for in-stock alerts)
- Product price alert (if allowing users to sign up for price alerts)
- Configure Store Email Addresses - System->Configuration->Store Email Addresses
 - General contact
 - Sales representative
 - Customer support
 - Custom email 1 (if desired)
 - Custom email 2 (if desired)
- Configure transactional templates and senders - System->Configuration
 - Contacts->Email Options
 - Set "Send Emails To" to the email address you want to receive contact form notifications at
 - Change "Email Sender" to the email address you would like to receive the notification from
 - Change "Email Template" to the template created earlier (you can leave this one as default)
 - Catalog->Product Alerts (if allowing price or stock alerts for customers)
 - Change "Price alert Email Template" to the template created earlier (do NOT leave as default)
 - Change "Stock alert Email Template" to the template created earlier (do NOT leave as default)
 - Change "Alert Email Sender" to the email address that notifications will be sent from
 - Email to a Friend->Email templates
 - Change "Select email template" to the template created earlier (do NOT leave as default)
 - Newsletter ->Subscription Options
 - Change "Unsubscription Email Sender" to the email address that unsubscription emails should be sent from
 - Change "Unsubscription Email Template" to the template created earlier (do NOT leave as default)
 - Change "Success Email Template" to the template created earlier (do NOT leave as default)
 - Change "Success Email Sender" to the email address that successful subscription emails should be sent from
 - Change "Confirmation Email Sender" to the email address that confirmation emails should be sent from (if requiring confirmation)
 - Change "Confirmation Email Template" to the template created earlier (do NOT leave as default - only if requiring confirmation)
 - Customer Configuration->Create New Account Options
 - Change "Default Welcome Email" to the template created earlier (do NOT leave as default - only if not requiring account confirmation)

- Change “Email Sender” to the email address that welcome emails should be sent from
 - Change “Confirmation Link Email” to the template created earlier (do NOT leave as default - only if requiring account confirmation)
 - Change “Welcome Email” to the template created earlier (do NOT leave as default - only if requiring account confirmation)
- Customer-Configuration->Password Options
 - Change “Forgot Email Template” to the template created earlier (do NOT leave as default)
 - Change “Forgot Email Sender” to the email address that password emails should be sent from
- Wishlist->Share options
 - Change “Email Template” to the template created earlier (do NOT leave as default)
 - Change “Email Sender” to the email address that wishlist sharing should be sent from
- Sales Emails->Order
 - Change “New Order Confirmation Email Sender” to email address that new order confirmation emails should be sent from
 - Change “New Order Confirmation Template” to template created earlier (do NOT leave as default)
 - Change “New Order Confirmation Template for Guest” to template created earlier (do NOT leave as default - only if allowing guest orders)
- Sales Emails->Order Comments
 - Change “Order Comment Email Sender” to the email address that order comment emails should be sent from
 - Change “Order Comment Email Template” to the template created earlier (do NOT leave as default)
 - Change “Order Comment Email Template for Guest” to the template created earlier (do NOT leave as default) - only if allowing guest orders)
- Sales Emails->Invoice
 - Change “Invoice Email Sender” to the email address that invoice emails should be sent from
 - Change “Invoice Email Template” to the template created earlier (do NOT leave as default)
 - Change “Invoice Email Template for Guest” to the template created earlier (do NOT leave as default - only if allowing guest orders)
- Sales Emails->Invoice Comments
 - Change “Invoice Comments Email Sender” to the email address that invoice emails should be sent from
 - Change “Invoice Comments Email Template” to the template created earlier (do NOT leave as default)

- Change “Invoice Comments Email Template for Guest” to the template created earlier (do NOT leave as default - only if allowing guest orders)
- Sales Emails->Shipment
 - Change “Shipment Email Sender” to the email address that invoice emails should be sent from
 - Change “Shipment Email Template” to the template created earlier (do NOT leave as default)
 - Change “Shipment Email Template for Guest” to the template created earlier (do NOT leave as default - only if allowing guest orders)
- Sales Emails->Shipment Comments
 - Change “Shipment Comments Email Sender” to the email address that invoice emails should be sent from
 - Change “Shipment Comments Email Template” to the template created earlier (do NOT leave as default)
 - Change “Shipment Comments Email Template for Guest” to the template created earlier (do NOT leave as default - only if allowing guest orders)
- Sales Emails->Credit Memo
 - Change “Credit Memo Email Sender” to the email address that invoice emails should be sent from
 - Change “Credit Memo Email Template” to the template created earlier (do NOT leave as default)
 - Change “Credit Memo Email Template for Guest” to the template created earlier (do NOT leave as default - only if allowing guest orders)
- Sales Emails->Credit Memo Comments
 - Change “Credit Memo Comments Email Sender” to the email address that invoice emails should be sent from
 - Change “Credit Memo Comments Email Template” to the template created earlier (do NOT leave as default)
 - Change “Credit Memo Comments Email Template for Guest” to the template created earlier (do NOT leave as default - only if allowing guest orders)
- Checkout->Payment Failed Emails
 - Change “Payment Failed Email Reciever” to the email address that should receive failed payment notifications
 - Change “Payment Failed Email Sender” to the email address that failed payment emails should be sent from
 - Change “Payment Failed Template” to the template created earlier (if one was created - the default template may be fine here)

Branding: System->Configuration

- Design->Header
 - Change “Logo Image Src” to a logo that you have previously uploaded into /path/to/magento/skin/frontend/default/[theme name]/images - the default is 169 x 49 pixels

- Change “Logo Image Alt”
- Change “Welcome Text”
- Design->Footer - Change “Copyright”
- Catalog->Product Image Placeholders - Upload placeholders for Base Image, Small Image, and Thumbnail
- Sales->Invoice and Packing Slip Design
 - Upload “Logo for PDF print-outs” (must be 200 x 50)
 - Upload “Logo for HTML print view”
 - Add “Address”
- Replace /path/to/magento/skin/frontend/default/default/images/logo_email.gif with your own logo OR upload a logo and change the path in your transactional email templates
- System->Manage Stores – Select “Main Website Store” and change the “Name” to your store name
- System->Manage Stores - Select Default Store View and change the “Name” to your store name

Scheduled Tasks: System->Configuration

These tasks assume that you have set up cron.php to run every hour (see “Recommended but Optional”)

- Currency Setup->Scheduled Import Settings - Enable and configure
- Catalog->Product Alerts Run Settings
- Google Sitemap->Generation Settings - Enable and configure
- System->Log Cleaning - Enable and configure

Misc. Configuration: System->Configuration

- General->Countries options - Set “Default country” and “Allow countries”
- General->Locale options - Set “Timezone”, “Locale”, “First Day of Week”, and “Weekend Days”
- Web->Polls - Set “Disallow voting in a poll multiple times from same IP-address” to Yes
- Currency Setup->Currency Options - Change “Base currency”, “Default display currency”, “Allowed currencies”
- Sales Emails->Order - Change “Send Order Email Copy To” to the email address(es) that should receive new order notifications
- Sales Emails->Order Comments - Change “Send Order Comment Email Copy To” to the email address(es) that should receive order comment notifications
- Sales Emails->Invoice - Change “Send Invoice Email Copy To” to the email address(es) that should receive new invoice notifications
- Sales Emails->Invoice Comments - Change “Send Invoice Comment Email Copy To” to the email address(es) that should receive invoice comment notifications
- Sales Emails->Shipment - Change “Send Shipment Email Copy To” to the email address(es) that should receive shipment notifications
- Sales Emails->Shipment Comments - Change “Send Shipment Comment Email Copy To” to the email address(es) that should receive shipment comment notifications

- Sales Emails->Credit Memo - Change "Send Credit Memo Email Copy To" to the email address(es) that should receive credit memo notifications
- Sales Emails->Credit Memo Comments - Change "Send Credit Memo Comment Email Copy To" to the email address(es) that should receive credit memo comment notifications
- Checkout->Payment Failed Emails - Change "Send Payment Failed Email Copy To" to the email address(es) that should receive payment failed notifications