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Website Development + Strategies

WooThemes and WooCommerce Unveiled

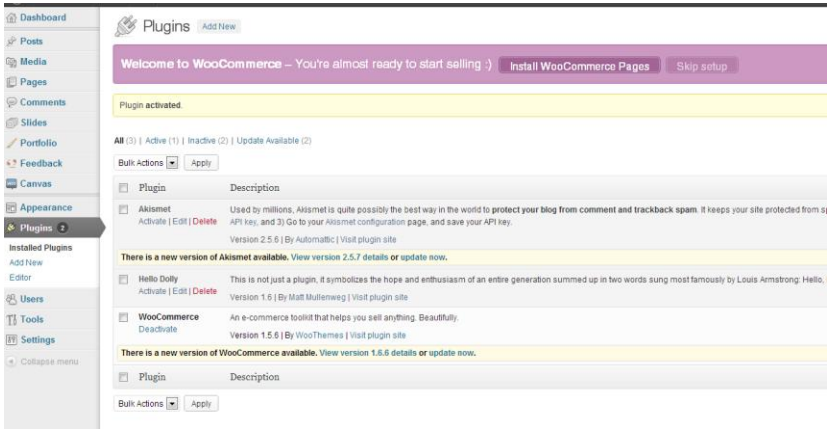
Jon Valade :: WordCamp 2013

Preparation Work

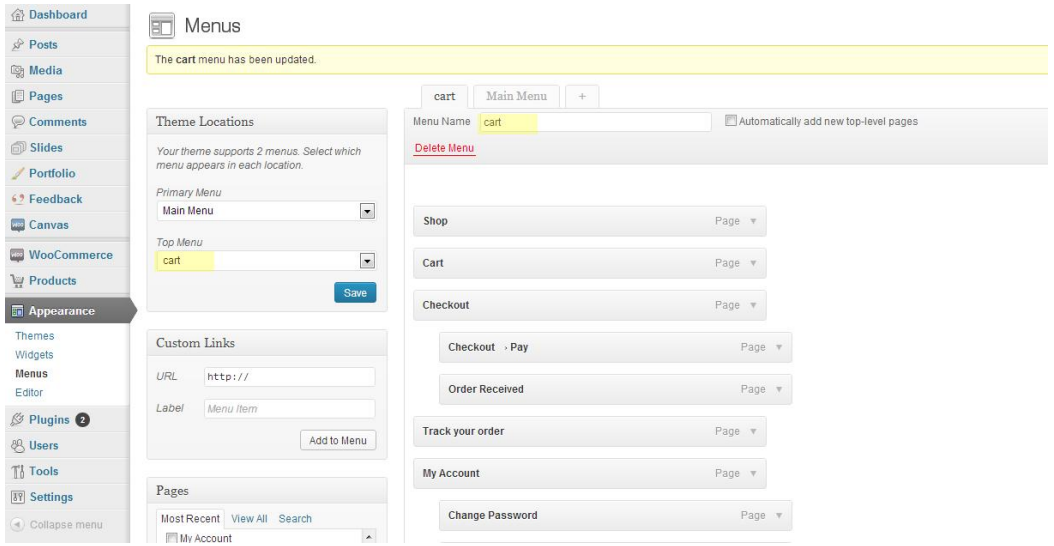
1) Download all necessary files from WOO Themes -- http://www.woothemes.com/
    a. Canvas Theme
    b. Canvas Commerce Child Theme
    c. WOO Commerce Plugin
    d. Additional Useful Plugins as needed
        i. Canada Post Plugin
        ii. Nested Category Layout
        iii. Additional Payment Gateways (if not using PayPal)
        iv. MailChimp Integration
        v. PayPal Advanced – if taking payments on site
        vi. Print Invoices and Packing Slips ****
        vii. Genesis Connect (use WOO Commerce with Genesis theme)

2) Install Theme and Child Theme
3) Install Plugins starting with WOO Commerce

After the WOO Commerce Plugin is installed it will ask you to 'Install WooCommerce Pages'. Do this now.

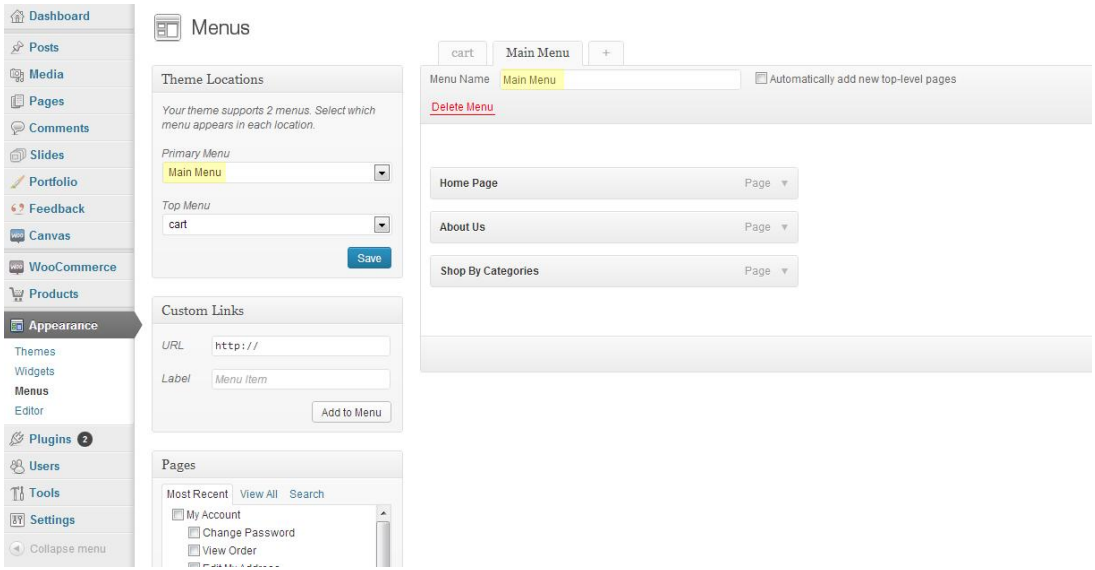


4) Go to Appearance --> Menus and create a menu called 'Cart' and bring in the pages that WooCommerce just created. Assign that menu to the 'Top Menu'
    a. This will completely set up your e-commerce menu at the top of the page above the header.



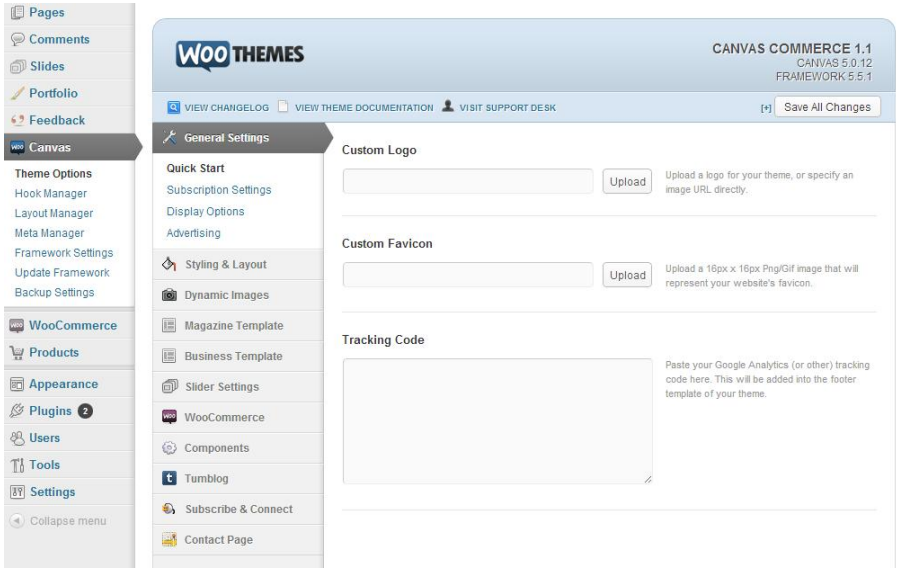
5) Create a few pages
    a. Home page → Business template – this will allow rotating header images in the template
    b. Shop By Category → this will allow you to create a page where you can browse categories
    c. Any additional pages that you might want. About Us – Contact Us…..

6) Go back to Appearance → Menu
    a. Create a menu called 'Main Menu' and bring in the pages you just created. Assign this menu to the 'Primary Menu'.



7) Also bring in the 'Shop' page that was previously created by WooCommerce and rename it to 'Shop by Product'
    a. Now we have a link in the main navigation to browse all products alphabetically AND we will have a page linked to the 'Shop by Categories' menu that will allow visitors to see the product categories. A short code will need to be entered into that page later once we have our shopping categories set up.
8) Setting → Reading
    a. Set your front page to be a static page → the Home Page you created
    b. Adjust the rest of the settings

START STYLING YOUR WEBSITE



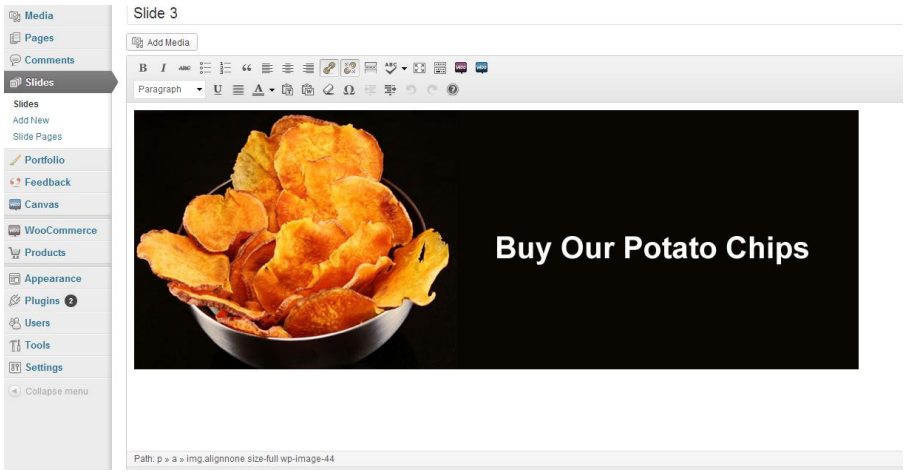
WooThemes provides its own menu item to stylize the site. The order this menu is in is not ideal from a creative perspective. The order that I use is:

- General Setting
    - Custom Logo
    - Custom Favicon
- Style & Layout
    - Background colour or image
- Layout Set up
    - Set your page width (1000px)
    - Sidebar and Footer Widget area
- Boxed Layout

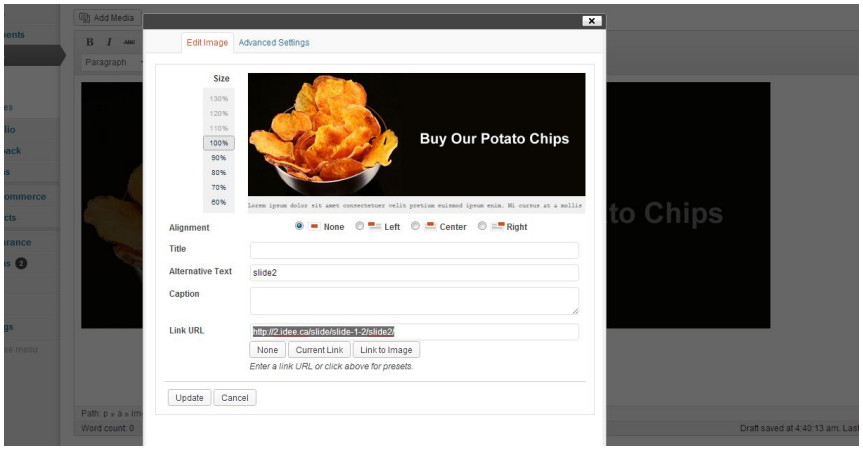
- Primary Navigation
- Top Navigation
- Widgets
- General Typography
- Posts / Pages
- Footer

SET UP YOUR HOME PAGE

- Prepare your slides. A good size for these is 980px by 350px
- Go to Business Template in the WooThemes admin and select 'Featured Slider'
    - Click to Enable the featured slider
    - Select the number of slides
    - Select your display order
    - Select if you want the Title to appear on the slide
- Go to 'Slider Settings' and select options you want
- In the main WordPress admin select Slides → Add new
    - Select 'Add Media' and simply put your slide into the main editor body



If you want your slide to link to a page, product or category, simply set the 'Link URL' in the image options dialogue box.



Repeat this for all the slides.

In the main WordPress admin section, go to Pages → your Home Page, and populate the body of your page like usual.

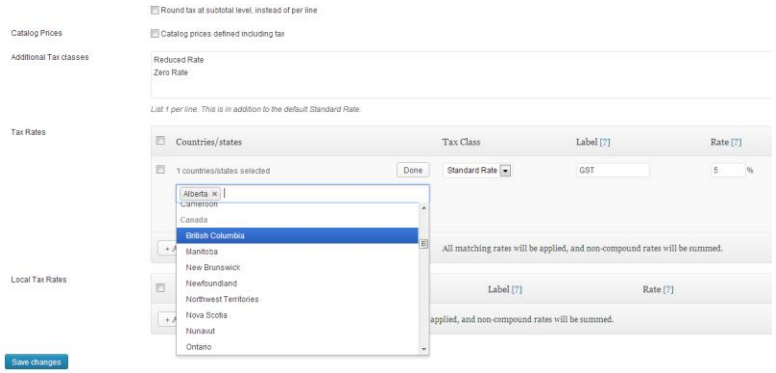
WOO COMMERCE SET UP

For our purposes we are assuming that:

- We are using the basic PayPal payment gateway and taking payments off our site
- We are using flat rate shipping with a number of additional shipping options that all have set costs

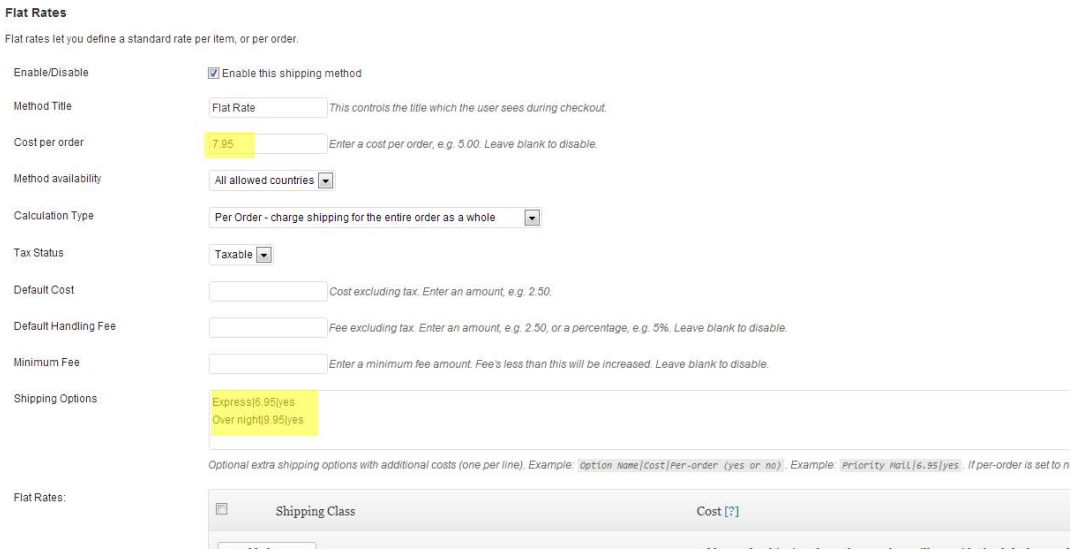
In the main WordPress admin go to WooCommerce → Settings

1) General Settings
    a. Base Country/Region → Canada, British Columbia (presumably)
    b. Currency → Canadian Dollars
    c. Select all needed options
2) Catalogue
    a. Look through all of the options. Site will work fine using defaults
3) Pages
    a. These have been pre-set when WooCommerce was installed. Will work fine using the current defaults
4) Inventory
    a. To be set if you intend to use the website to track inventory
5) Tax
    a. If selling in Canada, you will need to set up the tax tables FOR EVERY PROVINCE since the taxation rate is based on the destination province.
    b. Taxation tables can be found here… http://www.aacb.com/tools/taxtable.asp
        i. Under Countries/states, select Add Tax Rate
        ii. Click Edit and select a province
        iii. Enter the Tax Label (GST, HST or PST/GST) and the tax percentage

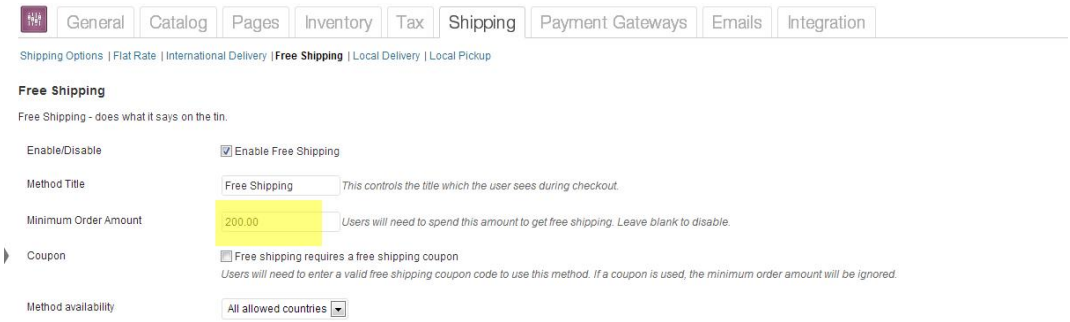


6) Shipping
    a. Notice all of the default shipping options in the sub menu

    b. We are going to go to each individually and make sure that only 'Flat Rate' and 'Free Shipping' are enabled.
    c. Under 'Flat rate' enter 'Cost per order' – in this case 7.95
        i. Select Calculation Type – per order
        ii. Select if taxable
        iii. Under Shipping options we are going to add an option for 'Express' and another for 'Over Night'. Note that the amounts entered here are ADDED to the Cost per Order general shipping rate



d. Under 'Free Shipping' we are going to add an option to offer free shipping for any order over $200.00



7) Payment Gateways
   a. Notice all of the default payment options in the sub menu
      i. We are going to go through each individually and make sure that only Paypal is enabled
      ii. In the Paypal area, enter the email address of your Paypal account and disable the sandbox.

Payment Gateways | Bacs | Cheque | **Paypal** | Cash On Delivery

PayPal standard

PayPal standard works by sending the user to PayPal to enter their payment information.

Enable/Disable	☑ Enable PayPal standard
Title	PayPal *This controls the title which the user sees during checkout.*
Description	Pay via PayPal; you can pay with your credit card if you don't have a PayPal account *This controls the description which the user sees during checkout.*
PayPal Email	jon@ideazone.ca *Please enter your PayPal email address; this is needed in order to take payment.*
Shipping details	☐ Send shipping details to PayPal instead of billing. *PayPal allows us to send 1 address. If you are using PayPal for shipping labels you may prefer to send the shipping address rather than billing.*
Address override	☐ Enable "address_override" to prevent address information from being changed. *PayPal verifies addresses therefore this setting can cause errors (we recommend keeping it disabled).*
Submission method	☐ Use form submission method. *Enable this to post order data to PayPal via a form instead of using a redirect/querystring.*
Page Style	*Optionally enter the name of the page style you wish to use. These are defined within your PayPal account.*
PayPal sandbox	☐ Enable PayPal sandbox *PayPal sandbox can be used to test payments. Sign up for a developer account here.*
Debug Log	☐ Enable logging

WE ARE READY TO START ADDING PRODUCTS

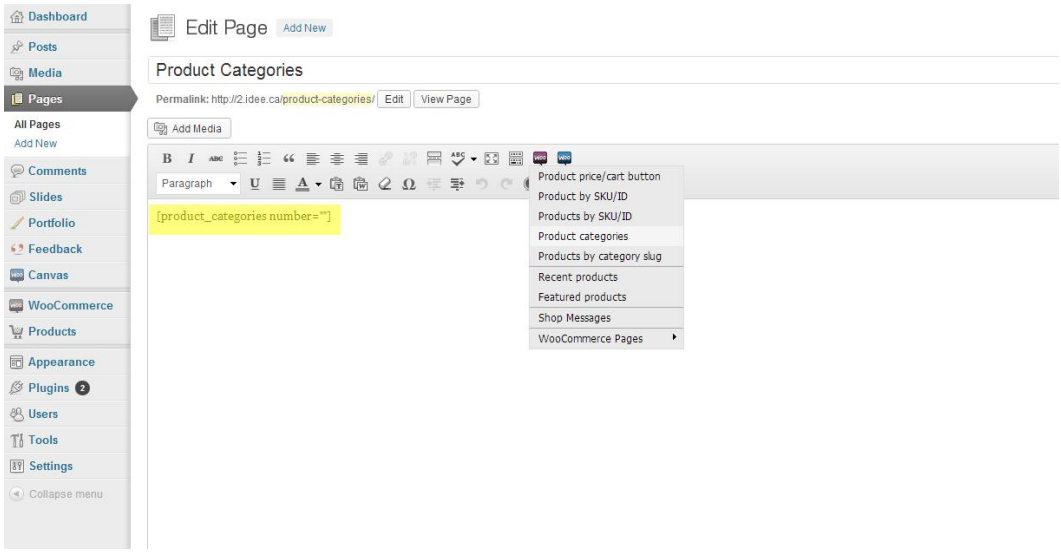
Setting up your product categories and your categories page

In the main WordPress admin go to Products → Product Categories

- Create a Product Category and upload and image for the category
- Repeat for as many categories as you need

In the main WordPress admin got to you Pages and select the page that you previously created for visitors to view your Product Categories.

- Find the WooCommerce icon in the top menu of the editor and select “Product Categories”. This will enter the short code to display the product categories on this page. Now, from the main navigation menu, your visitors will have the option to view your product alphabetically or by category.

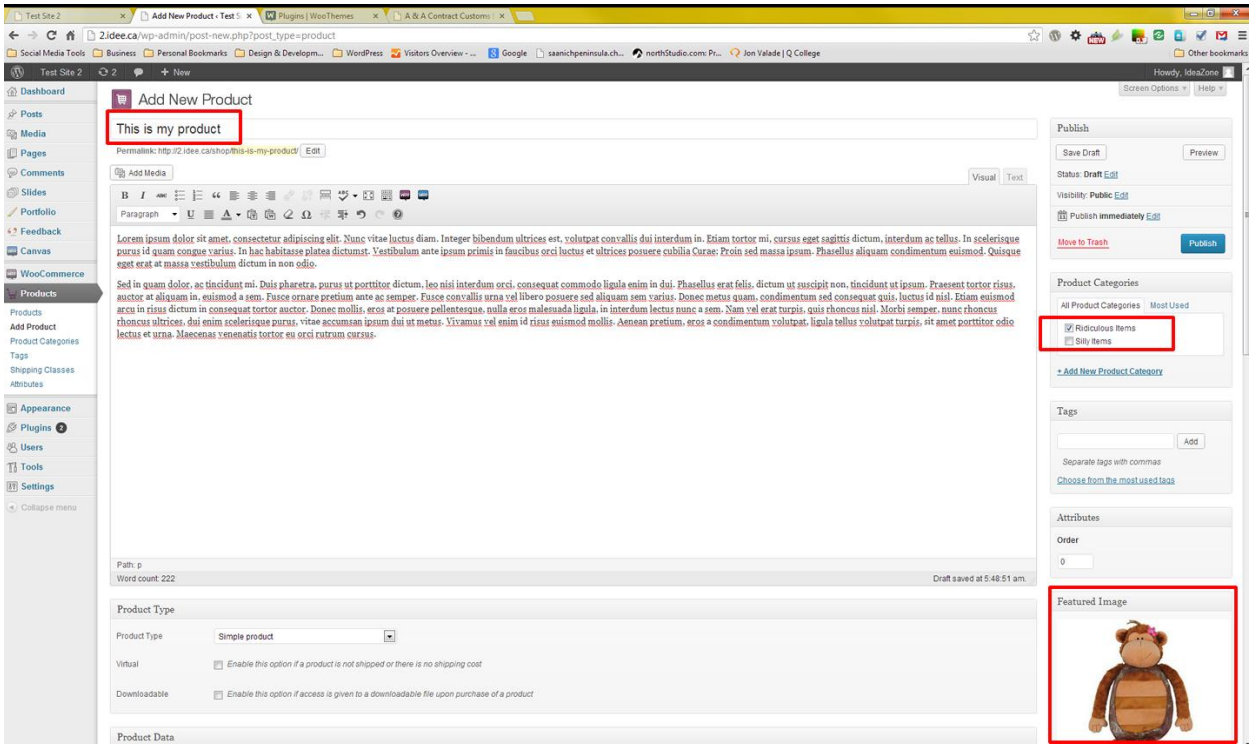


Setting up your products

For our purposes we are only going to be setting up the simple products without using the inventory system.

In the main WordPress admin section select Products → Add Product

- Fill in
    - Product Name
    - Long Description in the main editor body
    - Scroll down and enter the Product Short Description
    - Under Product Categories select the proper category
    - Use the Featured Image option to upload the main image



Still in the editor page

- Under ‘Product Type’ select ‘Simple Product’
- Under ‘Product Data’ fill in the general information including:
    - SKU
    - Regular Price
    - Weight and Dimensions are only needed if using the Canada Post module for shipping
    - Select if the product should be featured