

Sales & Orders

Magento Installation & Setup Guide

Introduction

Sales & Orders is the only fully immersive Marketing Software Built for Ecommerce. Our app supports over 11,000 merchants from around the world in helping them succeed in their product advertising efforts across channels such as Google Shopping, Microsoft (Bing Shopping), Facebook and Instagram.

With our Magento module, store owners can quickly send products to Google Merchant Center, Microsoft Merchant Center, and Facebook as well as create ad campaigns for these channels and optimize those campaigns with our suite of specialized tools.

This guide includes a full installation walkthrough with:

- **3 separate ways** to complete the installation of our module
- Configuration of the module along with product attribute mapping directions
- An example demonstration of connecting to a channel through our module (ie Google)

To access the S&O Magento Extension, visit the Extension Marketplace @ <https://marketplace.magento.com/sales-and-orders-magento-app.html>

Versions & Requirements

The Sales & Orders extension supports both the Community and Enterprise editions of Magento starting from version 2.1.

The current version of Magento installed on your website can be found in the lower right corner of any backend page.

You must have permissions to write to the root and sub folders to be able to successfully install the module.

The screenshot displays the Magento 2.3.2 Admin Backend dashboard. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners. The main content area is divided into several sections:

- Average Order**: \$14.50
- Last Orders**: A table with columns Customer, Items, and Total.

Customer	Items	Total
Veronica Costello	1	\$0.00
Veronica Costello	1	\$29.00
- Last Search Terms**: A table with columns Search Term, Results, and Uses.

Search Term	Results	Uses
Dual Handle Cardio Ball	18	1
- Top Search Terms**: A table with columns Search Term, Results, and Uses.

Search Term	Results	Uses
Dual Handle Cardio Ball	18	1
- Summary Metrics**: Revenue (\$0.00), Tax (\$0.00), Shipping (\$0.00), and Quantity (0).
- Bestsellers**: A tabbed interface with options for Bestsellers, Most Viewed Products, New Customers, and Customers. Below the tabs, a message states: "We couldn't find any records."

At the bottom of the page, the footer contains the copyright notice: "Copyright © 2019 Magento Commerce Inc. All rights reserved." and the version information: "Magento ver. 2.3.2" with a link to "Report an Issue".

Installation Option #1: Copy Code

1. Download the extension's package from your customer account, unzip it
2. Use any SSH client to connect to your server. Bear in mind that the user should have write permissions to this folder and its subfolders
3. Upload all the files and folders from the extension's package to the root Magento folder
4. Via SSH, navigate to the root Magento folder and perform the command:
 - *php bin/magento module:enable SalesAndOrders_FeedTool*
5. Clear the compiled code and cache:
 - *php bin/magento setup:upgrade*
 - *php bin/magento cache:flush*
 - *php bin/magento setup:static-content:deploy*

Installation Option #2: Composer

*Use any SSH client to connect to your server. Bear in mind that the user should have write permissions to this folder and its subfolders

1. Navigate to the root Magento folder.
2. Perform the command:
 - *composer require salesandorders/magento-app*
3. Clear the compiled code and the cache:
 - *php bin/magento setup:upgrade*
4. To update the extension via composer perform the command:
 - *composer update salesandorders/magento-app*

Installation Option #3: Clone Repository

You can use our **Repository** for extension installation as well

<https://github.com/SalesAndOrders/magento-app>

Extension Config w/ S&O Account Setup

Important Note: Store owners with more than one store will be required to create additional accounts per each unique instance of the extension per store.

The extension will provide these permissions for the S&O app via REST API on store owner's behalf:

- View basic and general store information
- View and modify products
- View customers information
- View and create orders

After the extension is installed and enabled in Magento:

1. From your store's admin panel navigate to **Catalog/Sales And Orders/Install > Click Install in the main navigation**
2. Click the Install button on the next page. An integration will be created behind the scenes to allow S&O app access to your store and exchange tokens
3. Note that a notification will appear upon a successful integration. Click on the "Ok" button to continue
4. You will be taken to the email confirmation page. A confirmation code will be sent via email which must be used to continue on from this point
5. After successful email confirmation you will be prompted to choose your Magento store. A S&O account will be created and connected to your chosen store

Reference: Setup Steps

STEP #1

STEP #2 & 3

STEP #4

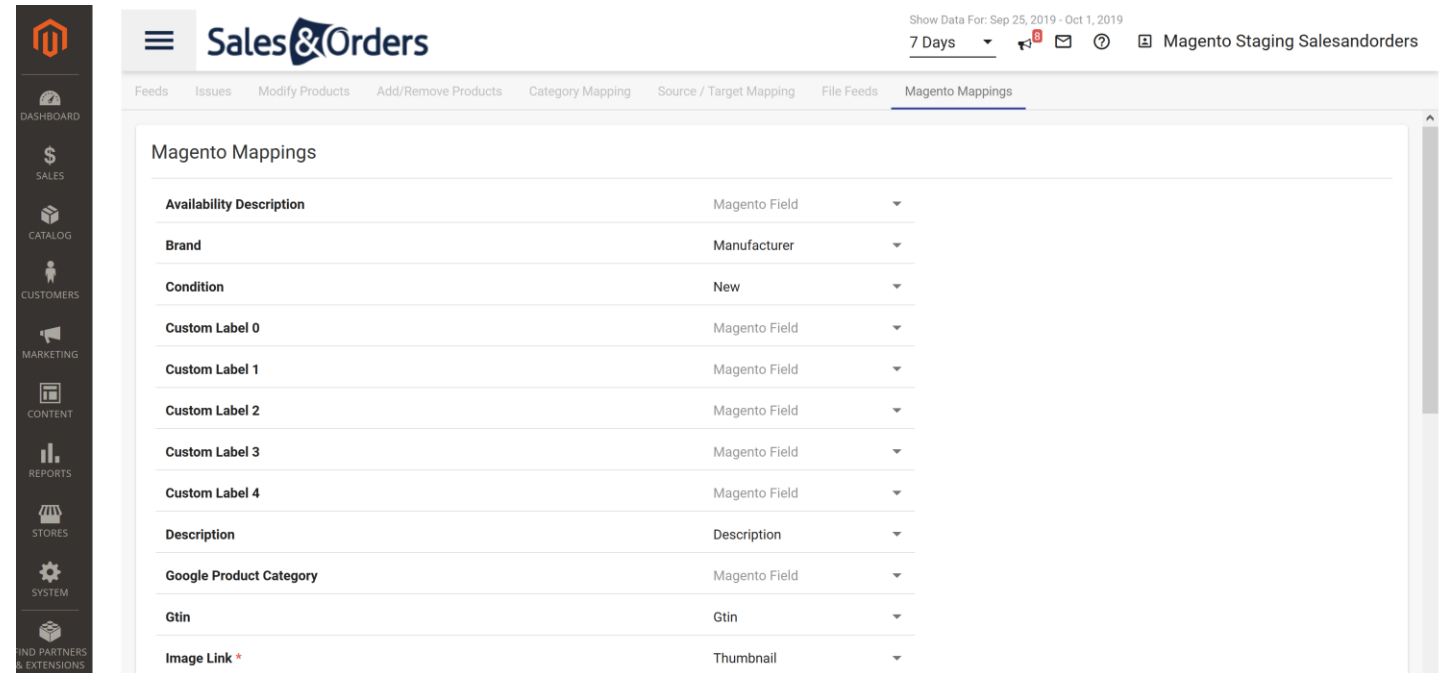
STEP #5

Product Attribute Mapping

With the creation of your S&O account now complete, you will be taken to the Product Attribute Mapping step of the installation.

At this point, our extension will have automatically pre-selected the required attribute mappings based on the specific criteria outlined by channels like Google, Microsoft, and Facebook. You may also choose to implement additional, custom attribute mappings based on the product data sourced from your store.

Once satisfied, click Save to complete your mappings. Note that you may return to this at any time to alter or adjust your mappings:



The screenshot shows the 'Sales & Orders' interface for 'Magento Mappings'. The left sidebar contains navigation icons for Dashboard, Sales, Catalog, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area displays a table of mappings with columns for the attribute name and the selected Magento field.

Magento Mappings	
Availability Description	Magento Field
Brand	Manufacturer
Condition	New
Custom Label 0	Magento Field
Custom Label 1	Magento Field
Custom Label 2	Magento Field
Custom Label 3	Magento Field
Custom Label 4	Magento Field
Description	Description
Google Product Category	Magento Field
Gtin	Gtin
Image Link *	Thumbnail

Channel Selection

Now that you have passed through the mapping section, you can select which channel to get started with.

Each channel within S&O has its own unique guided walkthrough wizard and will require specific credentials based on the criteria outlined by said channels.

As with most advertising channels, only Admin level permissions for accounts with Google, Microsoft (Bing), and Facebook can successfully complete an authentication.

Throughout the app, however, you will be able to communicate with S&O staff directly using Live Chat functions available Monday-Friday 9am-5pm EST.

Email and phone support is also available during the same time.

