Discovering the Administration Area

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Discovering the Administration Area

Now that you have installed PrestaShop 1.7 and that you are properly logged-in to your administration area, you should make sure to easily find your way through its administration interface, understand its notifications and know where to find one specific bit of information.

> ⓘ The design of the administration area has been partially revamped with version 1.7 of PrestaShop in order to be more intuitive and ergonomic (like the module and product pages). The navigation and main menu have also been changed compared to 1.6: while the features are the same, you might find it difficult to locate pages as you used to, at first.
>
> The purpose of this redesign is, of course, to make it easier for merchants to manage their shop.

We have created this chapter in order to help you make the most of your discovery of PrestaShop's administration interface. It has been designed to be very ergonomic and easy to use, but be aware that you should read the whole guide in order to get a perfect grasp of your new online business tool!

Overview of the main interface

Take the time to review the Dashboard – that is, the first page you see when logging into your back office. Not only does it present you with a summary of everything you need to know about your shop at any given time, along with quick links to the main action page, but as a first-timer in PrestaShop, it also gives you tips about what you should have a look at.

The top bar

At the top of the back office is a white bar containing a handful of information and links:

- **The PrestaShop logo**, followed by its version.
- **Quick Access**. This is the quick links menu, presenting the most useful links. You can customize it by clicking on "Manage quick accesses".
- **Search field with dropdown list**. Enables you to search within the content of your shop.
- **Debug mode** (optional). If you set your shop in Debug mode, an icon will be displayed to remind you it is enabled.
- **View my shop**. Opens a new browser tab with your shop's front-end.
- **Bell icon and number.** Indicates the number of new notifications, which by default will show you the last orders.
  - **Orders**. Opens a panel presenting the new orders since you last clicked that icon. From there on, you can either display one of the new orders or go to the list of orders.
  - **Customers**. Opens a panel presenting the last registered customers. From there on, you can either display one of the new customers or go to the list of customers.
  - **Messages**. Opens a panel presenting the last customer service message. From there on, you can either display one of the new messages or go to the list of messages.
- **Personal menu with your profile picture**. A simple dropdown panel with a reminder of the administrative account with which you are currently logged-in. It contains the following links:
  - **"Your profile" link**. Takes you to your account's preferences page, where you can set some personal options (for instance, the language of your back office or your password).

- **"Sign out" link**. Logs you out of the current user account.

The menus

All along your daily activities administrating your shop, you will have to browse through the many pages and options of the back office.

In PrestaShop 1.7, the menu has been reorganized in three main sections, from the pages you use the most frequently, to the one you open less often. Under these sections, each menu applies to a given set of tasks and contexts:

- **Dashboard**. The homepage of your back office, where you can see the main statistics, live.

Sell

It's all about your day-to-day activity. Orders, customers, catalog, etc. This section presents the essence of your business, where you go each day to get your business going.

- **Orders**. Once clients start adding products in their shopping carts, you will see orders on this menu, with the resulting invoices. This is also where you handle credit slips and abandoned carts, among other things.
- **Catalog**. This is the heart of your shop, where you will add products, create categories, set up carriers and suppliers, define discounts etc.
- **Customers**. Here you can access all the information about your clients, and edit their addresses.
- **Customer service**. Where you handle customer service and anything post-purchase: merchandise returns, per-order customer service, etc.
- **Stats**. This menu gives you access to all the numerous statistics and graphics that are gathered and generated by PrestaShop.
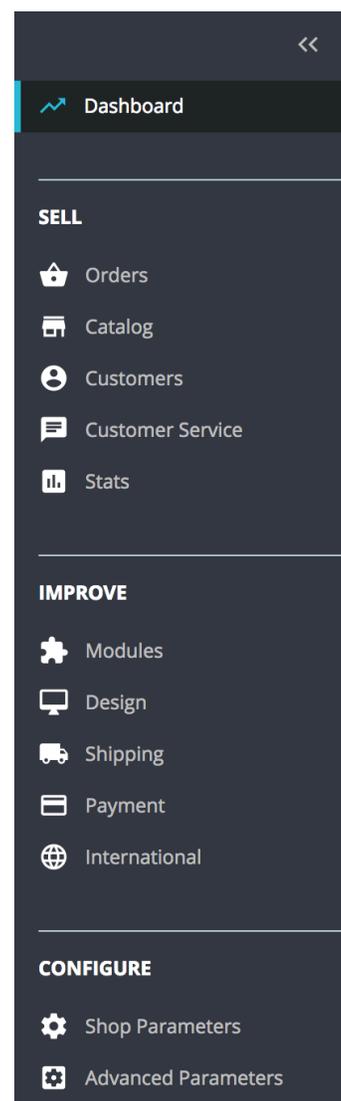
Improve

Here you will find everything to customize your shop and take your business further. Set up the look of your front office, adapt your payment methods to your target markets, expand internationally or enhance your shop with new modules and features!

- **Modules**. Extend the power and usefulness of your shop by adding and activating modules: more than a hundred are available by default, and many more are available to buy on the Addons marketplace.
- **Design**. This is where you handle themes, and where you can position the blocks of content from your module on the theme. More generally this is where you can modify the look of your shop.
- **Shipping**. Everything pertaining to carriers and shipping costs.
- **Payment**. Select which payment methods are available on your shop and apply global settings to payment modules.
- **International**. Helps you customize your shop with local values, such as language and translation, currency, units, taxes and tax rules, and geographical entities (regions, countries, etc.).

Configure

It is divided into two submenus. The first one is your shop parameters. You'll find here all the settings you need to configure when you launch your activity. Once you made your initial choices, you won't go there very often. The second menu can be seen as the technical section, with more advanced settings that aren't used often either.

- **Shop Parameters**. PrestaShop is a very configurable e-commerce solution, and you can edit just about any of its behaviors using these

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⤢ Dashboard

SELL

👜 Orders

🏪 Catalog

👤 Customers

💬 Customer Service

📊 Stats

IMPROVE

🧩 Modules

🖥 Design

🚚 Shipping

💳 Payment

🌐 International

CONFIGURE

⚙ Shop Parameters

⚙ Advanced Parameters

full-featured preferences.
* **Advanced Parameters**. This menu contains links to tools and informational pages that are too specific to fit in other menus, such as the Web service settings, the database backup tool, or the performance page, among others. This is also where are the settings pertaining to the back office itself; for instance, the content of the employee list and permissions.

These are the default menus. Note that modules can add new options to the existing pages, new pages to the existing menus, and even new menus. Some of these menus are further divided into pages with tabs to present you with the variety of features available in PrestaShop.

The buttons

Many of the back-end pages use recurring buttons, either at the top or at the bottom of the screen. For instance, the product edition page can have up to 8 buttons available at the same time.

More than simple shortcuts, they open actual features that you will use very often.

The available buttons vary a lot depending on the context, and therefore two different pages might not feature the same set of buttons. Still, there are a few that you will often see:

* **Add new**. Opens the creation page of the current context: new product, new product category, new order, etc.
* **Recommended Modules and Services**. Opens a pop-in window containing the modules available in the current context.
* **Help**. Opens the inline documentation for the current page – or "contextual help".

The "Recommended modules" button presents you the modules which apply to the current context. For instance, in the "Shipping > Carriers" page, it will display the modules from the "Shipping & Logistics" category of modules. This is very helpful when you need to quickly find which module to install and configure in order to get a given result.

Many of the back office forms are validated with buttons at the bottom of the screen:

* **Save**. Saves the content of the current page and returns to the list of existing items.
* **Save and stay**. Saves the content of the current page and keep the page open.
* **Cancel**. Returns to the list of existing items.

Data tables (lists of products, of categories, of customers, etc.) have their own set of buttons to manage the listed items:

* **Add new**. Creates a new item in the current context.
* **Export**. Downloads a CSV file of all the items.
* **Import**. Sends you to the CSV Import option page, from where you can import your CSV files.
* **Refresh List**. Reloads the list of items to display the latest changes.
* **Show SQL Query**. Provides the SQL query to reproduce your search or filter in your own SQL manager.
* **Export to SQL Manager**. Opens PrestaShop's SQL Manager tool (in the "Advanced Parameters") menu, from which you can query PrestaShop's database with SQL statements (`SELECT ... FROM ... WHERE ...`).
  If your list of items was filtered (by name, for instance), then the default SQL statement will take this into account (for instance, `WHERE 1  AND b.`name` LIKE '%blouse%'` for product list).

Contextual help

Since version 1.6.0.7 of PrestaShop, the software's documentation is directly embedded into the administration interface: clicking on the "Help" button from any back office page reduces the main interface's width in order to add a new column on the right, which contains the documentation for that section of the back office.

Another click on the "Help" button closes the contextual help. If you do not close the help column, PrestaShop understands that you want it displayed on every page of the back office and thus will maintain the column open until you have clicked to close it.

> ⚠️ If the browser's display zone is lower than 1220 pixels width, then PrestaShop will open the contextual documentation in a new browser window rather than reducing the screen space dedicated to the main interface.

At the bottom of the help column, a small form enables you to tell the PrestaShop team whether the help section has been helpful to you or not. Rate the help page by clicking on one of the five levels of satisfaction. If you click on one of the two lowest levels, PrestaShop will open a short form allowing to detail your thoughts? You can either fill it and click on the "Submit" button, or close the form by clicking on the cross, in which case only your rating will be sent to our server.

Dashboard

Let's now explore the content of the dashboard itself. It can feel crowded to a first-time user, but you will find that it gives an excellent summary of your shop's daily activities at a glance.

The dashboard is divided into 4 main areas: a horizontal bar, and three columns.

> ⚠️ **Demo mode**
>
> By default, the dashboard uses fake data so that you can better visualize what the various stats are for.
>
> When using PrestaShop for a real online store, you must disable this fake data so that your real data is used: deactivate the "Demo mode" option at the top right of the screen, next to the "Help" icon.

The header and demo mode

In addition to the contextual help, it also features the "Demo mode" option, from which you can disable the fake data used by default on the Dashboard and use your own data (as gathered by PrestaShop's statistics system).

The horizontal bar

At the top of the Dashboard is a single bar which helps you choose the period of time for the currently displayed dashboard statistics. Three sets of options are available:

- Current day, month or year.
- Previous day, month or year.
- Precise date selection (the button on the right, which opens a date selector).

Choosing an option updates all the blocks of content that are on the Dashboard so that they display data for the chosen period of time only. Blocks that are not stats-based do not change.

In order to choose a period of time, you can either click the first and last date of that period in the calendar (the clicking order does not matter), or you can type the dates in the YYYY-MM-DD format in the text boxes. Click "Apply" to see the Dashboard change according to your settings.
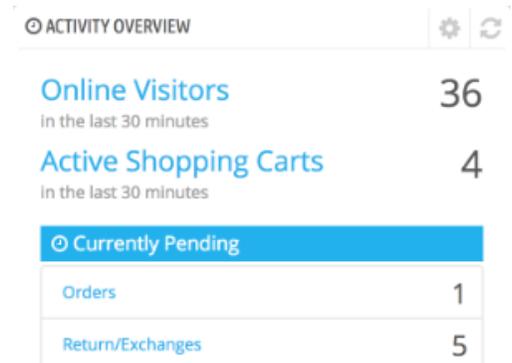
You can also compare two periods of time together by checking the "Compare To" box. Select the second period as would do for the first one (the two can even overlap), then click on the "Apply" button.

When comparing two periods, some of the content blocks will update to indicate the evolution of the data (see for instance the main "Dashboard" block, which presents data from the Dashboard Trends module).

The left column

This column presents you with data from the **Dashboard Activity module**, which gives the main figures from your database in a quick glance:

- Online visitors in the last 30 minutes.
- Active shopping carts in the last 30 minutes.
- Currently pending orders, return/exchange inquiries, abandoned carts and out of stock products.
- Notifications for new messages, order inquiries, and product reviews.
- New customers and new newsletter subscriptions.
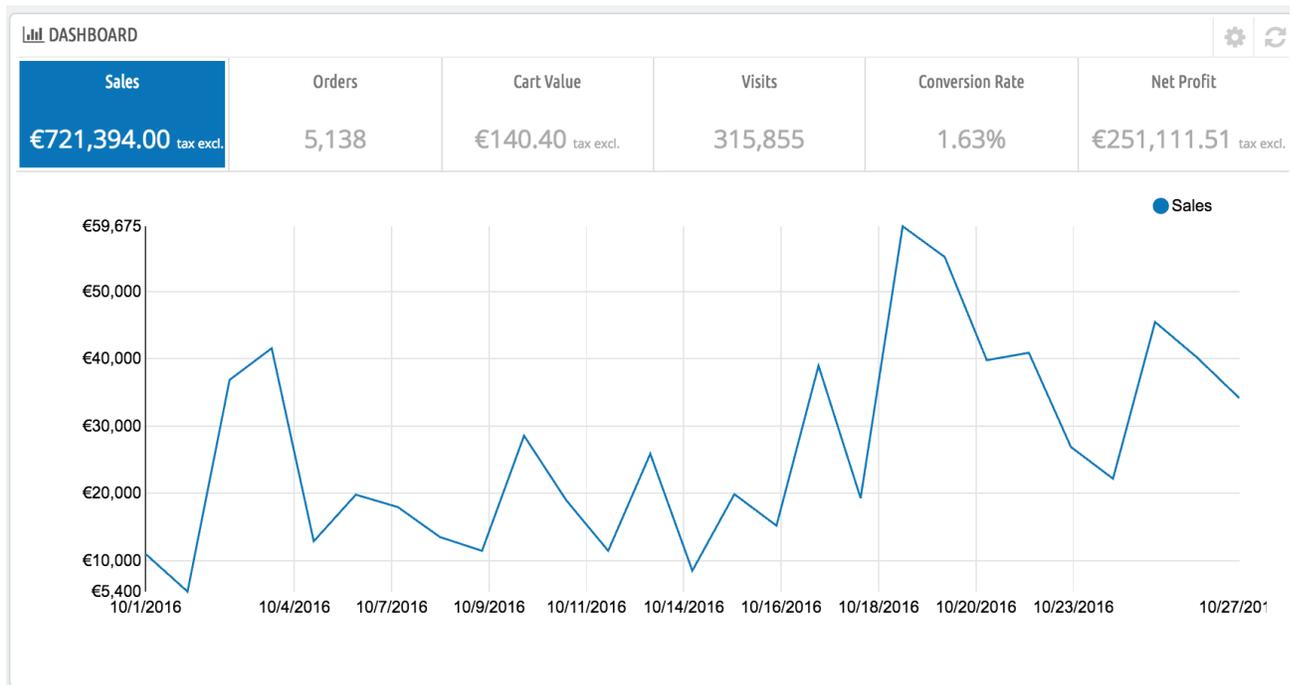- Traffic statistics: visits, unique visitors, traffic sources and direct links.

The central column

The central column is where the term "dashboard" takes its importance: this area of the dashboard presents the user (you) with the most important numbers pertaining to his shop's daily activities, along with a graph of sales and a list of the latest orders. Every time you log into your shop's administration area, you will be first and foremost looking at the evolution that these numbers take. This is where you see your shop live and breathe.
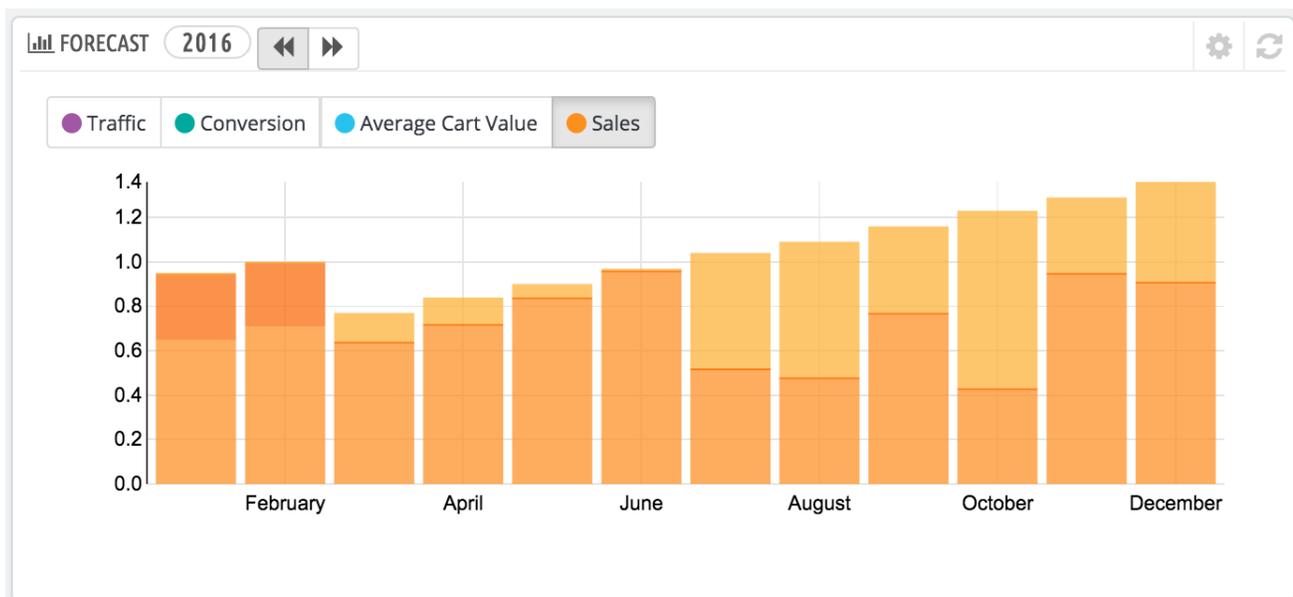
By default, there are three blocks of content in this column, which are handled by modules:

- **Dashboard** (Dashboard Trends module). This is the main block of information on the dashboard. With its various graphics, it really helps you see if your shop is headed in the right direction or not. Click on one of the graphic types to display it. Additionally, when comparing two time periods, it displays the evolution of each figure in percentages. Hover the graphic with your mouse to see the details.

Clicking on its configuration icon (top right) open a new page where you can set various expenses that your shop has (bank wire fee, average shipping fee, hosting expenses, etc.), in order to better indicate your trends.

- **Your Forecast** (Dashboard Goals module). This block presents you with the goals you have for the coming months, and how your shop is doing as compared to them. Hover the graphic with your mouse to see the details.

Depending on your monthly results, you should update your forthcoming goals. You can set your goals in the block's configuration form (top right of the block), and fill in your expectations month per month in terms of traffic, conversion rate, and average cart value. The "Sales" column will be updated according to the goals set in the other columns (for instance, for a 1000 visitors with a 2% conversion rate and a $10 average cart, you would get 1000*(2/100)*10 = $200). You can change the currency in the "Currencies" page under the "Localization" menu.

- **Products and sales** (Dashboard Products module). This block presents you with a table of your latest orders and a ranking of your products: best sellers, most viewed and top searches (as searched in your shop's search form, not from search engines).

You can set the number of items to display in each by opening the block's configuration form

The right column

This last column is an informational one: it gives you the latest news from PrestaShop.com, notifications about new PrestaShop versions, and useful links.