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# ONE STEP CHECKOUT

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## USER GUIDE

*Version 1.1.3*

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# 1. INTRODUCTION

Check out page of Magento has a weakness: to place an order, customers have to click Continue button for many time. We are happy to introduce the new release of extension One step checkout which is the combination of 6 steps of Magento standard checkout process into one. This extension makes checkout procedure more straightforward: one step with only one click to finish an order. All checkout information such as billing address, shipping method, payment method, etc... appear together in one page so that customers do not have to click any buttons to see the next steps. You will no longer miss any potential customers just out of inconvenient checkout and gain the increasing number of sales of your own store. Therefore, do not hesitate and try One step checkout!

## **Outstanding Features:**

- ✓ Easy installation and configuration
- ✓ Checkout on a single page
- ✓ Checkout title and description can be changed in back-end
- ✓ Full support checkout mode: register, guest, logged in
- ✓ Ajax pop up for login / forgot password
- ✓ Ability to disable fields such as: city, region, telephone, company, fax
- ✓ Set default shipping & payment method
- ✓ Enable / Disable checkbox for newsletter subscription
- ✓ Set checkbox for newsletter subscription checked by default
- ✓ Enable Terms and conditions
- ✓ Allow gift message for order
- ✓ Allow to show discount section in checkout page
- ✓ Allow customer to add comment for order
- ✓ Support logged in customer with multiple addresses
- ✓ Ability to hide shipping method if only one method is applicable

- ✓ Auto-update order totals when choosing shipping / payment method
- ✓ Auto-update shipping method when billing / shipping address is changed
- ✓ Auto-update payment method when choosing shipping method
- ✓ Email notification when there is a new order
- ✓ Support multiple stores
- ✓ Support multiple languages

## 2. HOW TO INSTALL

- After purchasing, you can download the file at once, license key will be sent to your email. The file that you download normally is a zip file. Unzip it to a folder.
- Use FTP client (like Filezilla, WinSCP, cuteFtp) to upload (copy) all folders in the zip package to your Magento site root folder. This will not overwrite any existing files, it only add new files to the folder structure.
- After uploading is done, Log in your Magento administration panel to refresh cache. Go to System > Cache Management. Select all caches and take action “Refresh” then submit.
- Navigate to System > Configuration, if you can see the extension tab, it is installed properly. Remember to put your license key to the License key management so that the module could be activated.
- Now if you get Access denied error when click on the extension tab, you need to log out admin panel and log in again.
- Go to front-end and try to process, make sure that everything is OK.

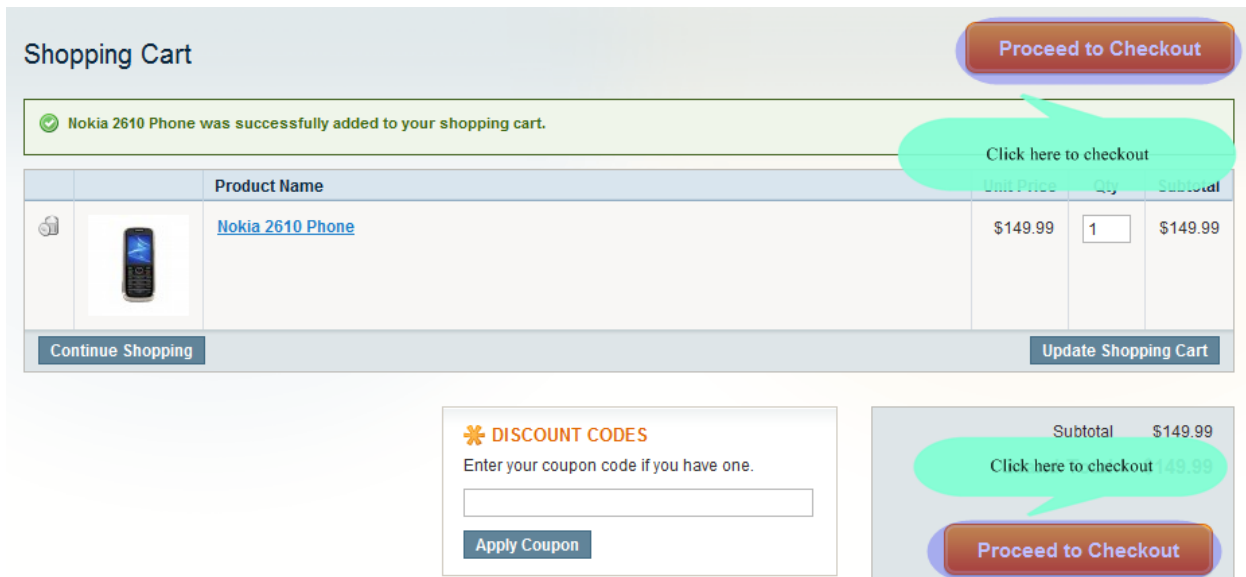
### 3. HOW TO USE

This section will show you how to use One step checkout extension in the frontend. After successful installation and enable One step checkout. Now, navigate to your frontend to see how it works.

As a customer, I want to buy a Nokia 2610 Phone, I go to the product page.

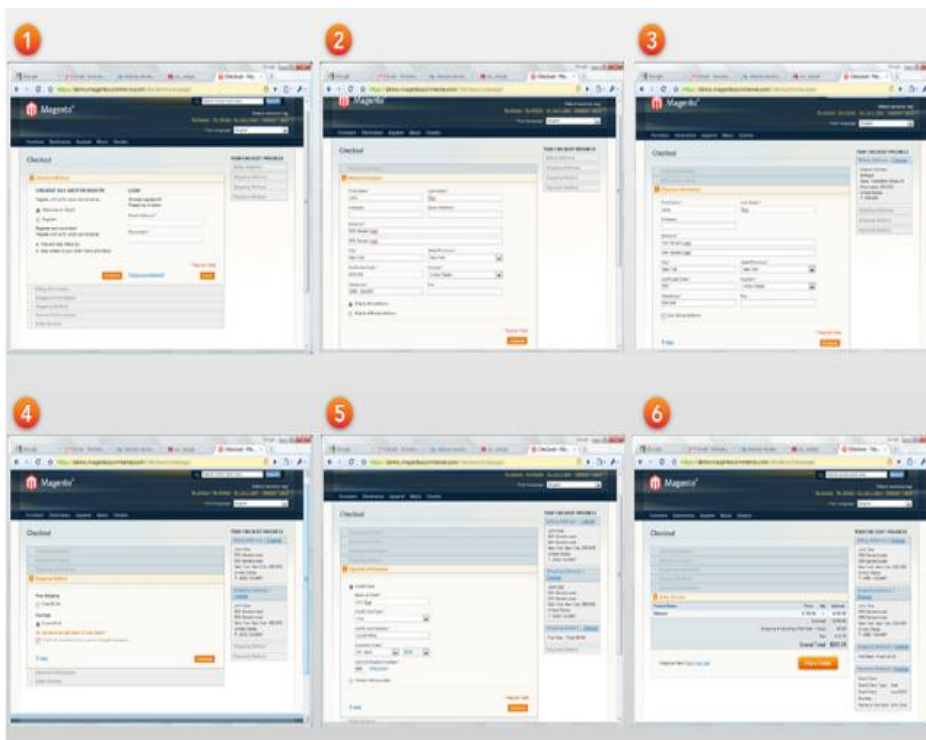


Click **Add to Cart** to product to your shopping cart. You can do the same if you want to buy more products. Otherwise, navigate to your shopping cart page.



Click on **Proceed to Checkout** to checkout your order. Now you will see the difference between normal checkout page of Magento and One step checkout.

At first, let's look at normal Magento checkout page, it is one page checkout with 6 separate steps:



As you see, normal Magento checkout page has 6 steps, including:

- Checkout method
- Billing address
- Shipping address
- Shipping method
- Payment method
- Order review

You have to complete each step before go to next step. Sometimes, it can make customers confused and it's easy to understand that lots of customers will leave your checkout process.

Now let's look at One step checkout to see how simple it is!

**ONE STEP CHECKOUT**  
Please fill in the fields below and click Place order to complete your purchase!  
[Already have an account? Click here to login](#)

**1 BILLING ADDRESS**

First Name\*  Last Name\*   
Email Address\*   
Address\*   
Country\*  State/Province\*   
City\*  Zip/Postal Code\*   
Telephone\*   
 Create account  
 Ship to different address

**2 SHIPPING METHOD**

Flat Rate  
Fixed \$5.00

**3 PAYMENT METHOD**

Check / Money order  
 Credit Card (saved)

**4 ORDER REVIEW**

Product Name	Price	Qty	Subtotal
Nokia 2610 Phone	\$149.99	1	\$149.99
Subtotal			\$149.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
<b>Grand Total</b>			<b>\$154.99</b>

I read and agree to [Terms and Conditions](#)

Forgot an item? [Edit Your Cart](#)

Wow, it's really simple; you can find all required information for checkout process here: checkout method (login, register, and guest), billing, shipping address, shipping and payment method, order review. You just need to fill out all information in this page and click **Place Order** one time to finish your order.

In One step checkout, you can also enable more features for customer, such as: enable newsletter subscription, order comment, gift message, terms and conditions. You can even show discount code for order in this page instead of having customer to come back shopping cart page.

Let me show you an example. At the beginning, I enable Order comment and newsletter subscription checkbox in configuration. I also enabled terms and conditions. In the frontend, it will be shown in the **Order review** section:

#### 4 ORDER REVIEW

Product Name	Price	Qty	Subtotal
Nokia 2610 Phone	\$149.99	1	\$149.99
Subtotal			\$149.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
<b>Grand Total</b>			<b>\$154.99</b>

#### Comments

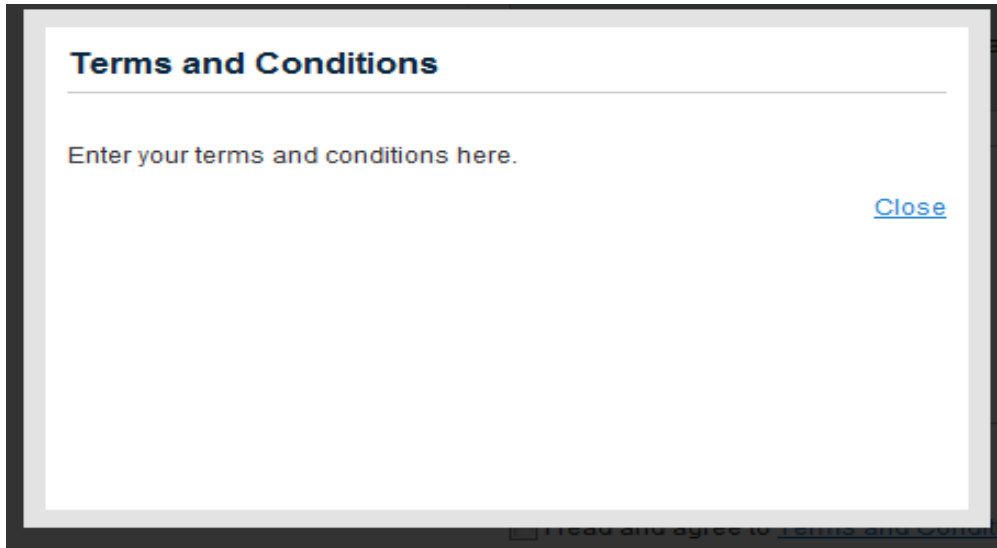
Sign Up for Our Newsletter

I read and agree to [Terms and Conditions](#)

Forgot an Item? [Edit Your Cart](#)

[Place Order](#)

Customer can enter comment, sign up for newsletter. Checkbox for Terms and Conditions is required to check to complete order. Customer can read Terms and Conditions by clicking on the link **Terms and Conditions**, once doing that, an ajax popup with customizable content will be shown:



Now, I enabled gift message for order. The look of frontend will be below:

Product Name	Price	Qty	Subtotal
Nokia 2610 Phone	\$149.99	1	\$149.99
Subtotal			\$149.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
<b>Grand Total</b>			<b>\$154.99</b>

Check this checkbox if you want to add gift messages.

If a customer clicks on the checkbox, he will see a form for him to enter description for his gift message.

Check this checkbox if you want to add gift messages.

**ENTER A GIFT MESSAGE FOR ENTIRE ORDER.**

You can leave this box blank if you do not wish to add a gift message for whole order.

**From**

**To**

**Message**

Another feature which is very useful is discount code. If it is enabled, you can find a section to enter and apply coupon code.

#### 4 ORDER REVIEW

Product Name	Price	Qty	Subtotal
Nokia 2610 Phone	\$149.99	1	\$149.99
Subtotal			\$149.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
<b>Grand Total</b>			<b>\$154.99</b>

##### Discount Codes

Enter your coupon code if you have one.

When you enter a coupon code, it will be applied and order review will be reloaded using Ajax instead of reloading the page.

#### 4 ORDER REVIEW



##### Discount Codes

Enter your coupon code if you have one.

After the coupon code is entered, all product details will be automatically updated including the product name, price, quantity and total price.

Product Name	Price	Qty	Subtotal
Nokia 2610 Phone	\$149.99	1	\$149.99
Subtotal			\$149.99
Discount (20% off)			-\$20.00
Shipping & Handling (Flat Rate - Fixed)			\$5.00
<b>Grand Total</b>			<b>\$134.99</b>

##### Discount Codes

Enter your coupon code if you have one.

Now make sure you fill out all information and click **Place Order**. You will see a confirmation page that your order is placed successfully.

**Your order has been received**

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**Thank you for your purchase!**

Your order # is: [100000019](#).

You will receive an order confirmation email with details of your order and a link to track its progress.

Click [here to print](#) a copy of your order confirmation.

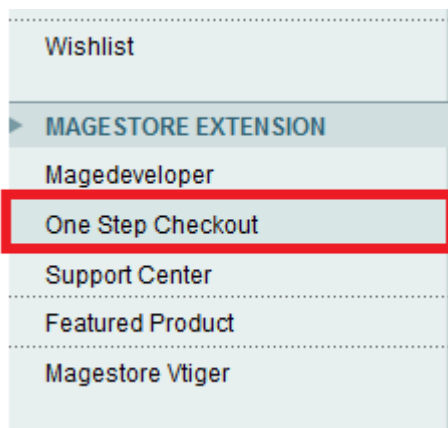
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[Continue Shopping](#)

## 4. HOW TO CONFIGURE

Now I think you understand how this extension works in frontend. In this section, I will show you how to configure the extension in admin panel to achieve your needs in frontend.

Firstly, log in the administration panel. After that, navigate to **System > Configuration**, you will see a menu namely **One Step Checkout**.



Click on that menu, you will see 6 tabs for configuration:



Let's go for detail of each tab to understand how to configure extension.

## 4.1. General configuration

General Configuration		
Enable One Step Checkout	<input type="text" value="Yes"/>	[STORE VIEW]
Enable different shipping address	<input type="text" value="Yes"/>	[STORE VIEW]
Default Payment method	<input type="text" value="Check / Money order"/>	[STORE VIEW]
Default Shipping method	<input type="text" value="[flatrate] Fixed"/>	[STORE VIEW]
Default Country	<input type="text" value="United States"/>	[STORE VIEW]
Default Region/State	<input type="text" value="California"/>	[STORE VIEW]
Default ZIP/Postal Code	<input type="text" value="90034"/>	[STORE VIEW]
Default City	<input type="text"/>	[STORE VIEW]
Using default data for disabled fields	<input type="text" value="Yes"/> <small>▲ Using default country, postcode, state, city for disabled fields</small>	[STORE VIEW]
Checkout title	<input type="text" value="One step checkout"/>	[STORE VIEW]
Checkout description	<input type="text" value="Please fill in the fields below and click Place order to complete your purchase!"/>	[STORE VIEW]

This tab contains configuration for general checkout process: shipping address, shipping method, payment method... When you open General Configuration tab, it should look like below:

- ✓ **Enable One Step Checkout:** Allow you to enable / disable the extension.
- ✓ **Enable different shipping address:** Show shipping address section or not.
- ✓ **Default payment method:** This setting allows you to define a payment method pre-selected for customer when entering the checkout page.
- ✓ **Default shipping method:** Set shipping method is pre-selected when entering checkout page.
- ✓ **Default country:** Set default country for checkout. This country is used to express shipping and payment methods which can be different for various countries.
- ✓ **Default Region / State:** Set default region / state for checkout.
- ✓ **Default zip / Postal Code:** Set default zip / postal code for checkout.
- ✓ **Default City:** set default city for checkout.

- ✓ **Using default data for disabled fields:** when select YES, default data (region, postcode, and city) will be used if you don't show those fields in checkout page.
- ✓ **Checkout title:** the text will be displayed in the top of checkout page.
- ✓ **Checkout description:** display below title.

## 4.2. Field management

This section includes settings for fields which are shown in the billing and shipping address section as well as some fields in the order review section.

Field Management		
Show city field	Yes	[STORE VIEW]
Show Zipcode field	Yes	[STORE VIEW]
Show company field	No	[STORE VIEW]
Show Fax field	No	[STORE VIEW]
Show telephone field	Yes	[STORE VIEW]
Show region field	Yes	[STORE VIEW]
Enable order comment	Yes	[STORE VIEW]
Show newsletter checkbox	Yes	[STORE VIEW]
Newsletter checkbox checked by default	Yes	[STORE VIEW]
Show discount code section	Yes	[STORE VIEW]

In this tab, you can configure to show / disable the following fields for the billing and shipping address:

- ✓ City
- ✓ Zip / postal code
- ✓ Company
- ✓ Fax
- ✓ Telephone
- ✓ Region

You can also choose to show following fields in the order review section:

- ✓ **Order comment:** enable customer to write comment for his /her order.
- ✓ **Newsletter checkbox:** checkbox for newsletter subscription.

- ✓ **Newsletter checkbox checked by default:** select Yes to make newsletter Checkbox checked by default when entering checkout page.
- ✓ **Discount code section:** select yes if you want to allow customers to enter discount code directly in checkout page instead of returning to shopping cart.

### 4.3. Checkout Mode

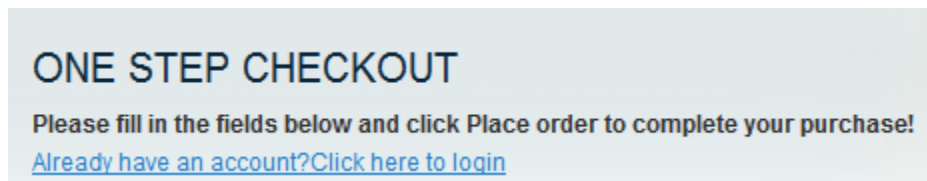
In this section, you can set up checkout mode for one step checkout. Following checkout modes are available:

- ✓ Login
- ✓ Register
- ✓ Guest

You can set up these three modes by three setting fields: **Show login link**, **Enable registration** and **Allow guest checkout**

Checkout Mode	
Show Login Link	Yes [STORE VIEW]
Enable Registration	Yes [STORE VIEW]
Allow Guest Checkout	Yes [STORE VIEW] <small>▲ if set to No, registration is required</small>
Login Message	Already have an account? Click here to <del>login</del> [STORE VIEW]

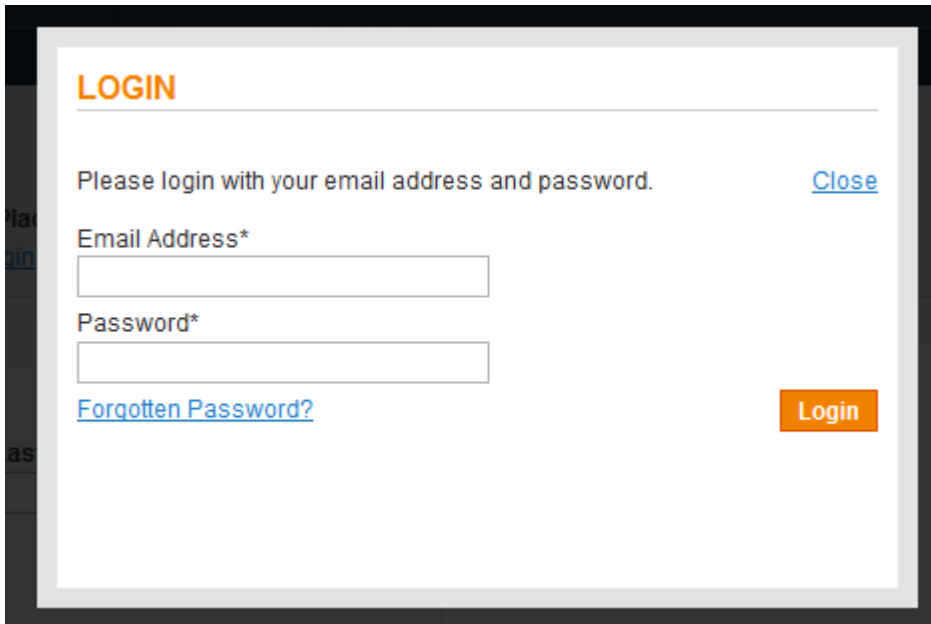
When you enable **Show Login Link** feature, if customer is not logged in, he will see a link for logging in in one step checkout page.



The text “**Already has an account? Click here to login**” can be changed in **Login Message field**.

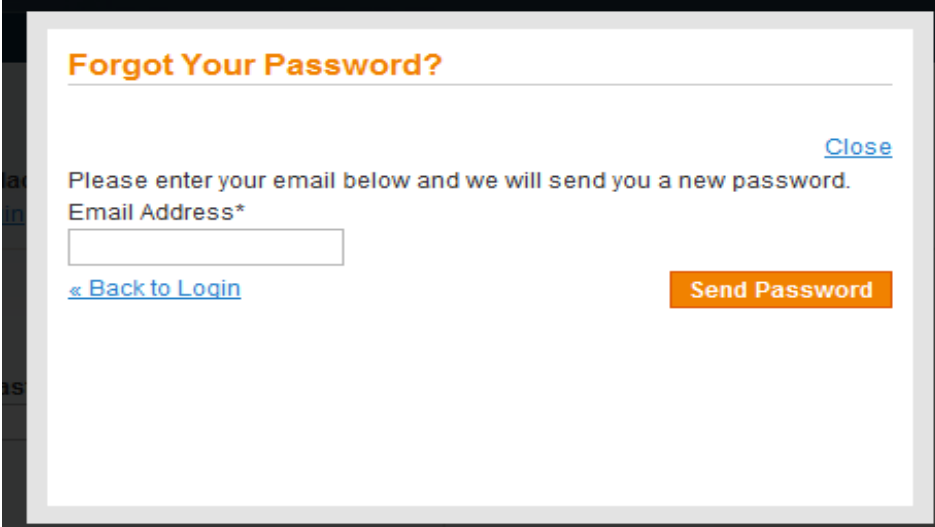
When customer clicks login, an ajax popup will be shown. With this popup, customer can enter his account to login or retrieve new password if he forgot it.

Login Ajax popup:



The image shows a screenshot of a login Ajax popup. The popup has a white background with a grey border and a dark grey shadow. At the top left, the word "LOGIN" is written in orange. Below it, a horizontal line separates the title from the main content. The main content area contains the following elements: a line of text "Please login with your email address and password." followed by a blue "Close" link; a label "Email Address\*" above a white text input field; a label "Password\*" above another white text input field; a blue link "Forgotten Password?" below the password field; and an orange "Login" button to the right of the "Forgotten Password?" link.

Forgot Password pop up:



The screenshot shows a modal window titled "Forgot Your Password?". At the top right is a "Close" link. Below the title, it says "Please enter your email below and we will send you a new password." followed by the label "Email Address\*" and an empty text input field. At the bottom left is a "Back to Login" link, and at the bottom right is an orange "Send Password" button.

**Enable Registration** feature allows customer to create an account in your store. If you enable this feature, customer will find 2 fields for password and confirm password which he will use to log in later.



The form shows a checked checkbox labeled "Create account". Below it are two input fields: "Password \*" on the left and "Confirm Password \*" on the right.

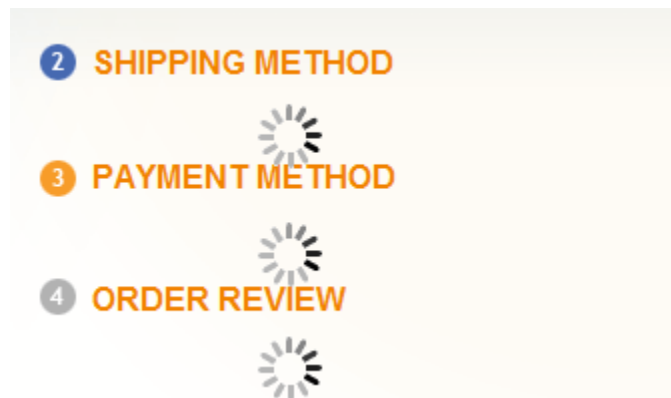
If a customer creates an account in your store, billing and shipping addresses are also saved for future purchase.

#### 4.4. Ajax update shipping / payment methods

### Ajax update shipping/payment methods

Enable Ajax save billing	<input type="text" value="Yes"/>	[STORE VIEW]
Billing fields to load Ajax	<ul style="list-style-type: none"><li>Country</li><li>Postcode</li><li>State/region</li><li>City</li></ul>	[STORE VIEW]
Update payment methods	<input type="text" value="Yes"/>	[STORE VIEW]

Ajax update shipping method is really a necessary feature if your store has different shipping methods / payment methods depending on the shipping address. Here is how it works in the Frontend:



When you enable this feature, the shipping and payment methods will be updated automatically every time customers change their address.

In this section, you can select fields which trigger the automatic update of shipping and payment methods.

If you only have different shipping methods for different addresses, you can turn update payment methods off by setting this tab to **NO**.

#### 4.5. Terms and Conditions

### Terms and Conditions

Show Terms and Conditions: Yes [STORE VIEW]

Terms and Conditions Content (HTML): `<div class="a-left page-title"> Terms & Conditions </div> <div class="content" style="text-align:left;"> Enter your Terms and conditions here. </div>` [STORE VIEW]

Terms and Conditions Popup Width: 400 [STORE VIEW]  
▲ Width of term and and condition pop up

Terms and Conditions Popup Height: 250 [STORE VIEW]  
▲ Height of term and and condition pop up

In this section, you can enable **Terms and Conditions** for checkout process. You can put HTML content for terms and conditions. When you enable this feature, it will be shown in the order review section:

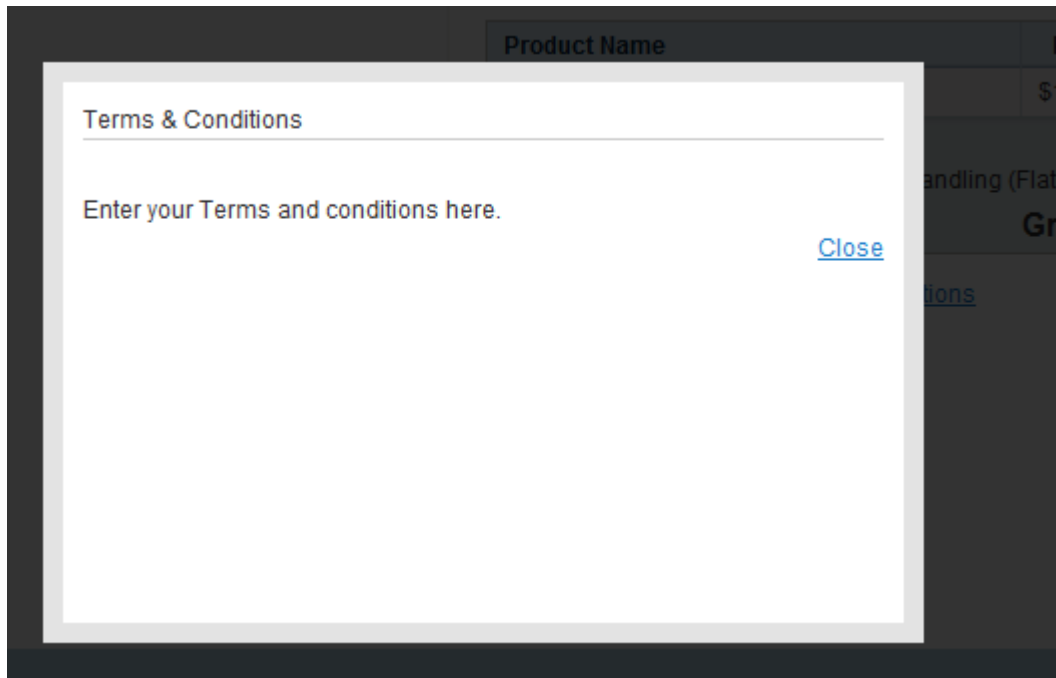
#### 4 ORDER REVIEW

Product Name	Price	Qty	Subtotal
Nokia 2610 Phone	\$149.99	1	\$149.99
Subtotal			\$149.99
Shipping & Handling (Flat Rate - Fixed)			\$5.00
<b>Grand Total</b>			<b>\$154.99</b>

I read and agree to [Terms and Conditions](#)

You customer will have to check this checkbox if he wants to place order. He can also read the **Terms and Conditions** by clicking on that link. If customer clicks on the link, an Ajax pop up with the terms and conditions will be shown:

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Width and height of this popup can be changed to fit your conditions length by 2 fields:

- Terms and conditions popup width
- Terms and conditions popup height

#### 4.6. How to send order email notification

Order Notification

Enable email notification  [STORE VIEW]

Notification email template  [STORE VIEW]

Send notification to emails  [STORE VIEW]

▲ Seperate by ','

One of important thing excluded in Magento is the feature which sends an email notification to admin when there is a new order. With our **One step checkout**, you can have that feature.

In this tab, you can enable the said feature and select the template you want to use for email notification. You can also enter a list of emails which you want to receive email notification. Emails are normally separated by comma.

You can customize email template by going to **System > Transactional Emails**. Select **Add New Template**, then select **New Order Notification** template

Load default template

Template \*

Locale \*

After the template is loaded, you can change its content in **Template Content** section. The following is an example of email notification:



**Hello,**  
You have received an order from your online store: Main Store.  
Order information is below:

**Order Id#10000016 (placed on October 12, 2010)**

<b>Billing Information:</b> Neo Nguyen R804, A1, 229 Vong street, Hai Ba Trung Atchison, Kansas, 66002 United States	<b>Payment Method:</b> Check / Money order		
<b>Shipping Information:</b> Neo Nguyen R804, A1, 229 Vong street, Hai Ba Trung Atchison, Kansas, 66002 United States	<b>Shipping Method:</b>		
<b>Item</b>	<b>SKU</b>	<b>Qty</b>	<b>Subtotal</b>
Nokia 2610 Phone	n2610	1	\$149.99
		Subtotal	\$149.99
		<b>Grand Total</b>	<b>\$149.99</b>

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