

Smile ElasticSuite for Retailers for Magento 2

User Guide

Versions: ElasticSuite for Retailers 1.2.0

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I - INTRODUCTION

1.1 WHAT IS ELASTICSUITE FOR RETAILERS?

ElasticSuite For Retailer is an extension of the module Smile ElasticSuite. It's a set of modules for Magento that provides several enhancements to Magento:

- A powerful and customizable store locator
- Manage your **product catalog** by store
- Personalize your navigation mode: Drive or Retail
- High performances & scalability

This set of modules has been designed to help merchants take up one of the biggest challenges in e-commerce:

• Set up an omni-channel strategy

To meet the challenges, the module is based on two concepts:

- Retailers
- Offers

This set of modules has been created by Smile Lab and is released under the Open Software Licence version 3.0.

1.2 WHO WE ARE

Set up in 1991, Smile is the first European integrator specialized in open source solutions.

On top of our engineering expertise, Smile offers a vast range of services: consulting upstream and in support of the projects, the interactive agency both in creation and web design and in editorial, strategic and e-marketing advice, application maintenance, training, support & maintenance in operational condition, hosting and exploitation.



Magento recognized Smile as a core partner through the « Magento solutions partner » partnership badge.



Since 2014, Smilelab is the innovation and experimentation entity of Smile. Our multidisciplinary team brings together experts in technology, innovation, and new applications. Together we explore, invent, and test technologies of the future, to better serve our clients.

1.3 REQUIREMENTS

First, you need to have the module Smile ElasticSuite 2.3.3 or higher. Nevertheless, it's possible to integrate only the Store Locator without ElasticSuite.

Smile ElasticSuite for Retailers has been successfully deployed and tested on the following Magento versions:

Magento EE 2.1.x or higher

Magento CE 2.1.x or higher

As far as possible, you should install the module at the early beginning of your Magento project, at the same time you install Magento. This way, your development team won't spend additional time to handle ElasticSuite specificities.

1.4 TERMINOLOGY

Product attribute A product attribute is a field in the product form. Product attributes

can be managed in the back-office in the menu Stores >

Attributes > Product.

Filter On most e-commerce website, when a list of products is displayed,

several filters are displayed in the left columns to help the user to

find a product: filter by price, brand, category...

Facet Synonym for « Filter ».

AutocompleteWe call "Autocomplete" the suggestions displayed during typing

in the search field.

POS Points of sale

1.5 FOR MORE INFORMATION

Smile FlasticSuite official website

GitHub Smile ElasticSuite for Retailer for

Magento 2

GitHub Smile ElasticSuite for Magento 2

GitHub Smile ElasticSuite for Magento 1

https://github.com/Smile-SA/elasticsuite

https://github.com/Smile-SA/elasticsuite-for-

http://magento-elastic-suite.io

https://github.com/Smile-SA/smile-magento-

elasticsearch

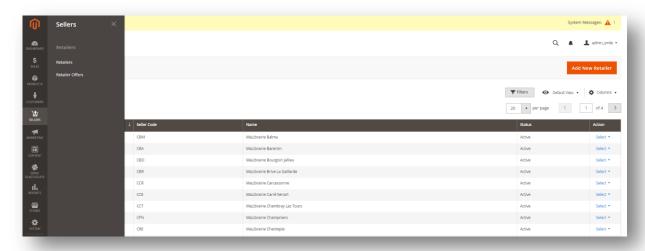
http://demo.magento-elastic-suite.io

http://www.smile.fr

Demo store (Magento 2)
Smile official website

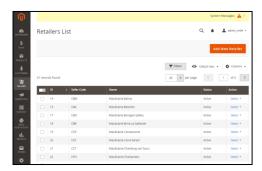
II - SELLERS ADMINISTRATION

The sellers menu provides easy access to the retailer and offer administration.



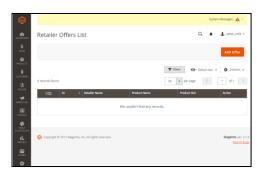
Seller Menu

Menu Options



Retailers

Create a new retailer and manage its information



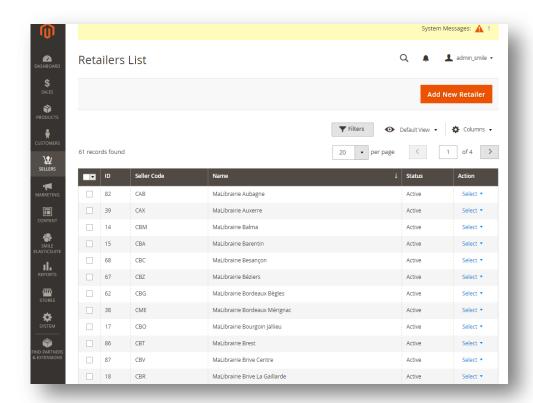
Retailer offers

Create product offers and manage their options

||.| RETAILERS ADMINISTRATION

The Inventory grid lists all retailers in the store locator. Use the standard controls to sort and filter the list, find products, and apply actions to the selected retailers. From the grid, you can create new retailers and edit existing ones.

Access: Seller > Retailers



Retailers grid

II.1.a Updating a retailer

You can edit a previously created retailer and add or remove some elements.

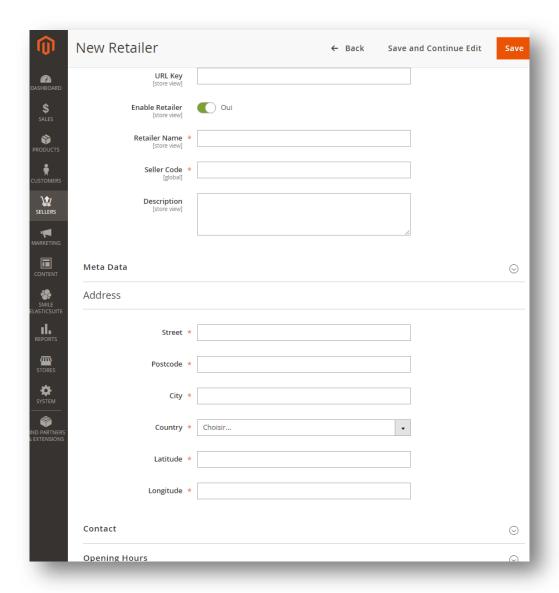
II.1.b Removing a retailer

You can remove a previously created retailer from the grid or by clicking the Delete Retailer button on the Retailer edit page.

II.1.c Create retailer

Here, you can edit and manage your stores.

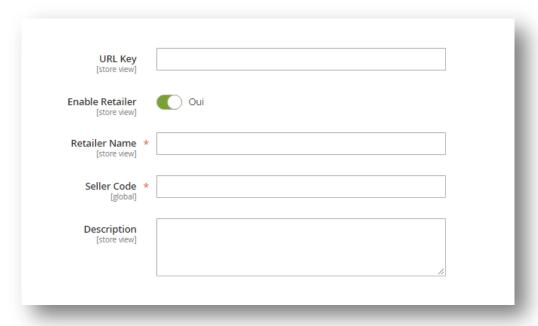
Access: Seller > Retailer > Add new retailer



New retailer Workspace

Step 1 – Complete the basics field

The first fieldset shown in this screen allows you to configure Retailer's basic data.

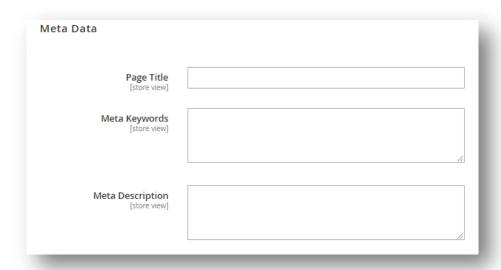


Basic attribute set

Attribute	Required	Description
URL Key	No	You can enter an URL Key for the retailer, or let the system automatically create one that is based on the «Retailer name». The URL Key defines the URL of the retailer details page.
Enable Retailer	Yes	To enable the retailer, set "Yes"
Retailer name	Yes	The name of this retailer
Seller code	Yes	A technical identifier for the retailer. Never displayed in Front-Office, may be used for internal purposes. This field should be unique among all retailers
Description	No	In the Description box, enter a paragraph or two of descriptive text for the retailer details page

Step 2 – Complete the meta data

The second attribute set contains SEO based attributes, to enhance your retailer's pages in Front-Office.



Meta data attribute set

Attribute	Required	Description
Page title	No	The meta title which will be displayed on the retailer page in Front-Office and on the search results of a browser. Fallbacks to the retailer Name if not defined.
Meta Keywords	No	Meta keywords to display in Retailer frontend page
Meta desription	No	The meta description which will be displayed on search results of a browser. Fallbacks to the retailer description if not defined.



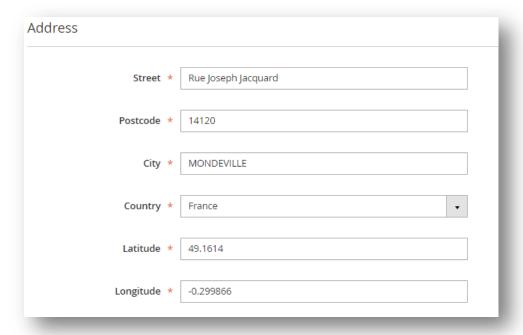
Recommended values

Examples of values that provided friendly SEO contents.

Page title: The number of characters should be between 66 and 69 (google). Meta description: The number of characters should be between 156 and 158 (google).

Step 3 – Complete the address

This attribute set allows you to set the address of the retailer

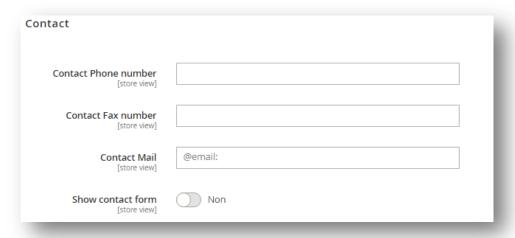


Address attribute set

Attribute	Required	Description
Street	Yes	The street of the retailer
Postcode	Yes	The postcode of the retailer
City	Yes	The city of the retailer
Country	Yes	The country of the retailer
Latitude	Yes	The latitude of the retailer
Longitude	Yes	The longitude of the retailer

Step 4 – Complete the contact information

This attribute set allows you to set the contact information of the Retailer



Contact information attribute set

Attribute	Required	Description
Contact phone number	No	The phone number of the retailer
Contact fax number	No	The fax number of the retailer
Contact mail	No	The email of the retailer
Show contact form	Yes	To enable the contact form, set "Yes"



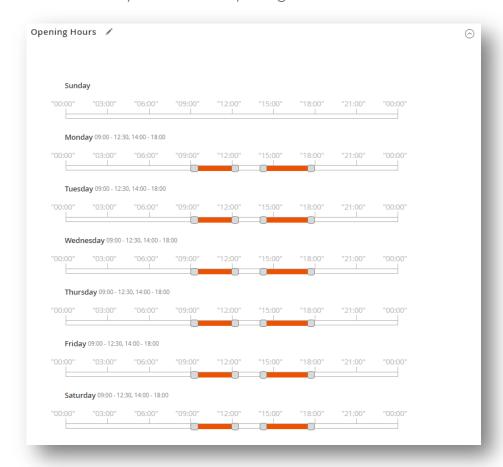
Contact form

The contact form allows you to send an email to the retailer directly from the website. The customer must complete the following fields:

- Name (required)
- Email (required)
- Phone number
- Message (required)

Step 5 - Complete the opening hours

This attribute set allows you to set the opening hours of the retailer

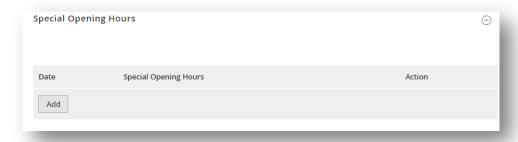


Opening hours attribute set

For every day of the week, you are able to set none or several opening periods. The intervals are divided by 15 minutes. If you want to indicate that the retailer is closed on Sunday, you just have to let this day empty.

Step 6 – Complete the special opening hours

This attribute set allows you to set the opening hours of the retailer



Special opening hours attribute set

With this attribute set, you are allowed to add Special Opening hours:

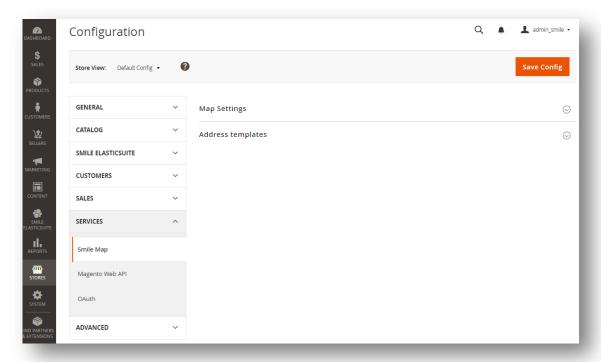
- Setting a day which is usually Open as Closed for a specific date (special closure).
- Setting a day which is usually Closed as Open for a specific date (special opening).

If you want to remove a special opening hours, just click on the recycle bin in front of it.

11.2 STORE LOCATOR CONFIGURATION

Store Locator Map configuration is editable via the Magento's store configuration.

It can be accessed under the Stores > Configuration > Services > Smile Map



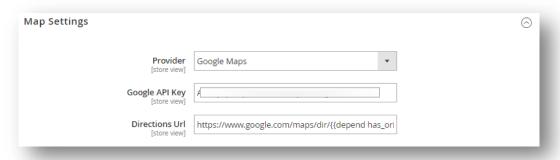
Store locator configuration

11.2.a Map configuration

Smile Map

Step 1 – Map setting configuration

This attribute set allows you to set the map settings.



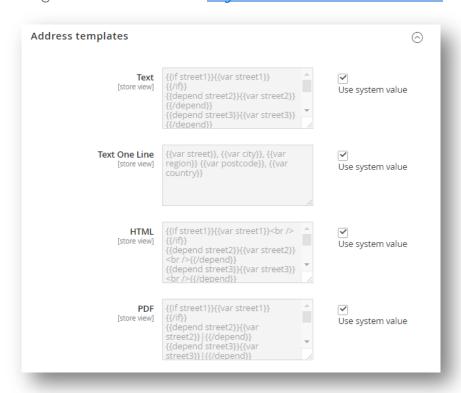
Map settings - attribute set

Attribute	Required	Description
Provider	No	You can choose between OpenStreetMaps and Google Maps as Map providers. Using Google Maps require to have a Google API Key with following features enabled: Geolocation, Google Maps API
Google API Key	No	If you choose Google as a provider, you can set your Google API Key here
Directions URL	No	The link to the Directions url of the provider. Will be used to render the Directions link for providers.

Step 2 – Address templates configuration

This panel allows you to customize how retailer's addresses are rendered in several different locations.

This works in the same way as on Magento. Additional information can be found in the official Magento documentation: <u>Magento does render Customer's address</u>



Address templates configuration

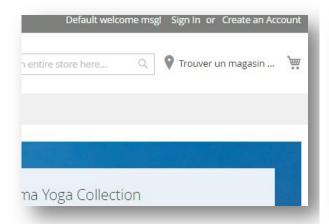
II.3 FRONT-OFFICE DISPLAY

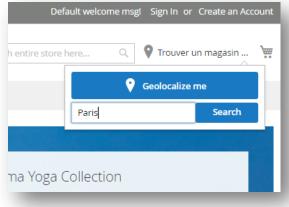
II.3.a **Header**

The customer has the access to the module via the header. By clicking on "find a retailer", they can do a rleret search in two ways:

- By geolocation
- By manual entry (City, postalcode, district,...)

When the customer click on "search", the customer is redirected towards the retailer search page.



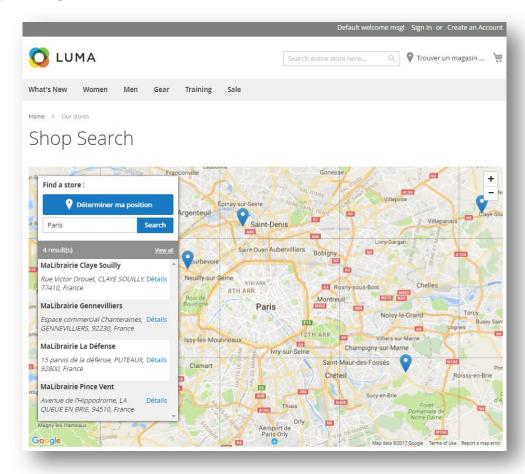


Header

Header with search retailer window

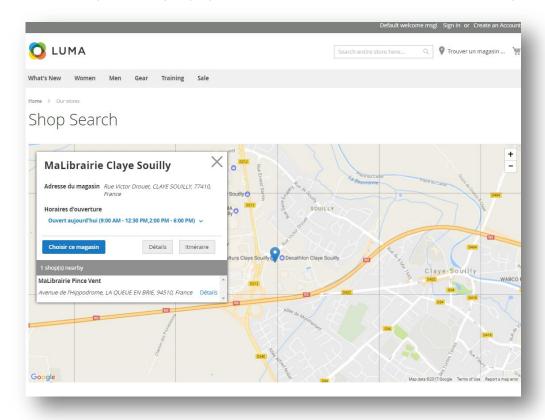
II.3.b Retailer search page

- 1- The map displays the stores closest to the customer's search. The results menu is dynamic. It reacts according to the zoom on the map, it refers the POS visible on the map. If there are 2 POS visible then there will be 2 results.
- 2- It's possible to make a **new manual search** from this page or to use geolocation.
- 3- By clicking on "View all" on the results block, the view widens to see all the shops.



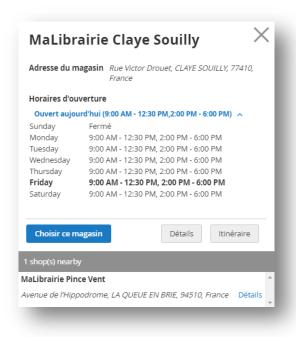
Shop search page

4- By clicking on "**Detail**" on the results bloc, the view is centered on the shop. The results block is replaced by a pop-in with information from the selected shop.



Store's information pop-in

Retailer pop-in

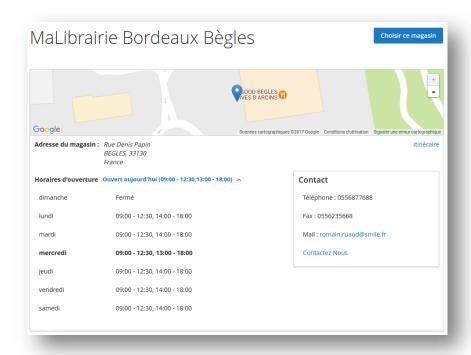


4- By clicking on "**Detail**" on the results bloc, the view is centered on the shop. The results block is replaced by a pop-in with information from the selected shop.

From this pop-in, several actions are available:

- Show opnening hours by clicking on the **arrow**
- Show the opening state of the shop: (open today, imminent closure,...)
- Select the store as repository by clicking on "**choose this shop**". This allows you to associate the store with the browsing session. (more information in this part)
- Reach the store page by clicking on "details"
- Create a route by clicking on "**route**". The customer is redirected to a new google map page (if you use google API) with the pre-filled arrival point (shop)
- View shops nearby

II.3.c Retailer page



Store page

All stores have a dedicated page. The retailers page consists of the following information:

- A small map
- The retailer address
- The Opening and closing hours
- A contact block with the following information:
 - o Phone number
 - Fax number
 - o Mail
 - Link to "contact us" opens the contact form in a pop-in. (more information about the contact form in the Part x)

It's always possible to add the current retailer as a repository.



Contact form

The link "contact us" is displayed only if the attribute "Show contact form" is enable.

II.3.d Contact form

If the retailer is configured to dispay the contact form, the customer can access to this form via the "contact us" link on the retailer page.



Retailer contact form

The contact form allows you to send an email to the retailer directly from the website. The customer must complete the following fields:

- Name (required)
- Email (required)
- Phone number
- Message (required)

III - RETAILER OFFERS CONFIGURATION

III. 1 INTRODUCTION

Elastic Suite for Retailers allows you to create product offers by point of sale. An offer consists of the following:

- A product
- A retailer (store)
- A selling price (discount)
- A catalogue price
- Availability

The creation of the offers can be done in the back-office.



Automatic offers creation

The implementation of a catalog flow for the management of offers is possible. The module has been designed in this sense.

III.2 CONTEXTUAL NAVIGATION

The "Smile elastic suite for retailer" module allows the user to choose a retailer. The retailer selection allows you to have two different catalog navigation modes depending on the configuration chosen in the back office. You have the choice between "**Drive**" mode and "**Retail**" mode

III.2.a Drive mode

The "drive" mode allows access to the user only to the product catalog of the selected retailer. Nevertheless, It's possible to have access to all retailer offers by setting the attribute "Display offers on product page" to yes.



Drive mode

This operation makes it possible to implement navigation logic by "assortment retailer" where the user's navigation begins with the choice of his retailer.

III.2.b Retail mode

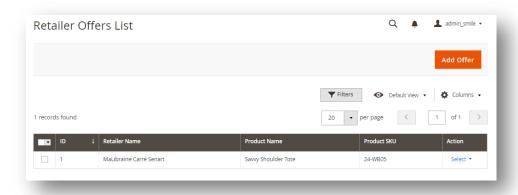
The "retail" mode allows to navigate in the web catalog and to have access to the retailer offers.

III.3 CONFIGURATION

In this section you will find how to manage the product offers and how to configure their options.

The Inventory grid lists all offers by retailers. Use the standard controls to sort and filter the list, find products, and apply actions to selected offer. From the grid, you can create new offer and edit existing ones.

Access: Sellers > Retailer offers



Retailer offers grid

III.3.a Updating a retailer

You can edit a previously created offer and add or remove some elements.

III.3.b **Removing a retailer**

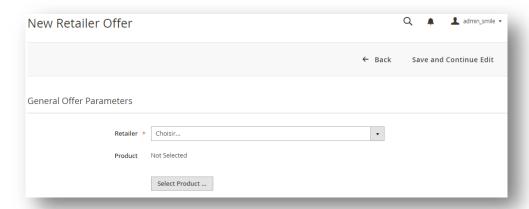
You can remove a previously created offer from the grid or by clicking the Delete button on the "action" edit grid.

III.4 CREATE AN OFFER

Access: **Seller** > Retailers > add offer

Step 1 – Complete offer parameters

First thing you will be prompted on when creating an offer is choosing a retailer and a product.



General offer parameters attribute set

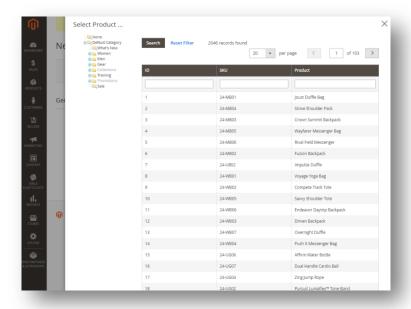
Attribute	Required	Description
Retailer	Yes	Selection of the retailer
Product	Yes	Selection of the product offer



Warning

Beware, the Retailer and the Product of the offer cannot be changed once the offer is created.

Step 2 - Product selection



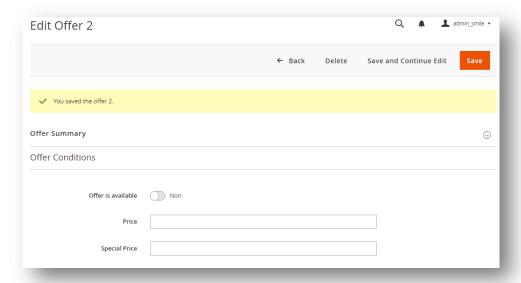
Product menu

When you click on "product", a window appears by left and you can select the product for which you want to create an offer.

Click on "save and continue" to go to the next step.

Step 3 - Complete offer condition

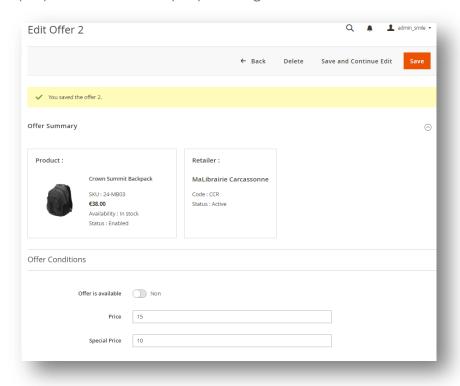
You have to complete the following fields for create new offer.



Offer conditions attribute set

Attribute	Required	Description
Offer is available	Yes	If the product is available for the selected Retailer.
Price	No	The product price for this Retailer (leave empty to let the product price unchanged)
Special price	No	The product special price for this Retailer (leave empty to let the product special price unchanged)

You can display an offer summary, by clicking on the tab or on the arrow.

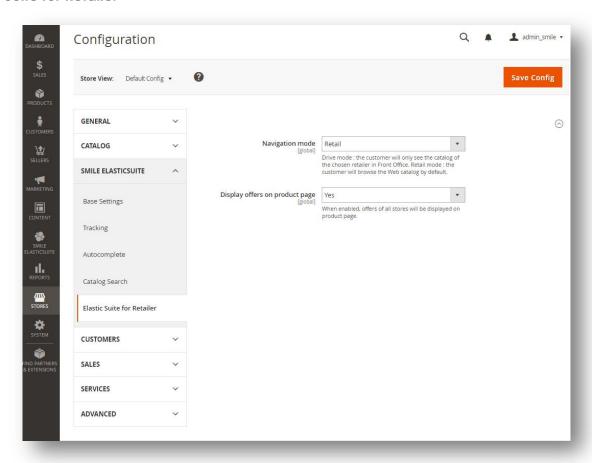


Offer summary

III.4.a Offers configuration

Navigation through offers can be configured Magento's store configuration.

It can be accessed under the Stores > Configuration > Smile ElasticSuite > Elastic Suite for Retailer



ElasticSuite for Retailer configuration

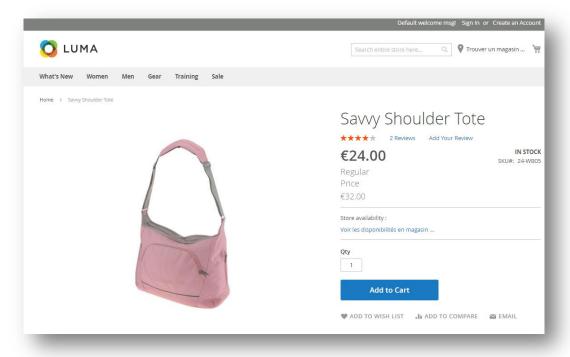
Attribute	Default value	Description
Navigation mode	Retail	Retail or Drive mode. On Retail mode, the custom will see prices and availability of the standard Catalog. On Drive mode, he will see availability and prices of his selected store.
Display offers on product page	Yes	When enabled, offers of all retailers will be displayed on product page.

Drive mode: the customer will only see the catalog of the chosen retailer in Front Office.

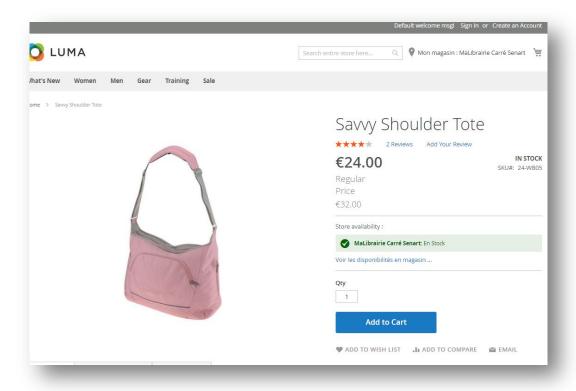
Retail mode: the customer will browse the Web catalog by default.

III.] FRONT-OFFICE DISPLAY

Depending on the configuration of the "mode" (retail or drive), the product page will have a new functionality "Retailer availability" and the price will be relevant with the retailer offer.



Retail mode with no selected retailer



Retail mode with selected retailer

When the user clicks on "see retailer availability", a pop-in displays with the following information:

- Shop search bar
- Shop list with their address
- Stock "in stock" or "out of stock"
- CTA "choose this retailer"

