

# **Celebros Salesperson Extension configuration for Magento**

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## Getting started

*Celebros* will provide you with 2 files:

1. A Zip file containing the plug-in.
2. Installation and configuration document.

Your first task will be completing the *Celebros* plug-in installation correctly. This means unzipping the Zip file you received from *Celebros* to the root directory of your Magento installation on the web server. The plug-in consists of two folders: *app* and *skin*. The *app* folders contain all the code and markup files while the *skin* folder contains the style sheet used by the new modules.

If you are using anything but the default template (for example, if you are using 1.9 or another enterprise edition), you will need to copy the relevant template file from the default template to the template you are using.

For example, EE1.9 uses a template called “enterprise” as its default template. In order to activate the plug-in, you would want to do the following:

1. Copy the contents of the folder\app\design\frontend\default from the zip file to \app\design\frontend\enterprise
2. Copy the contents of the folder\skin\frontend\default\ from the zip file to \skin\frontend\enterprise

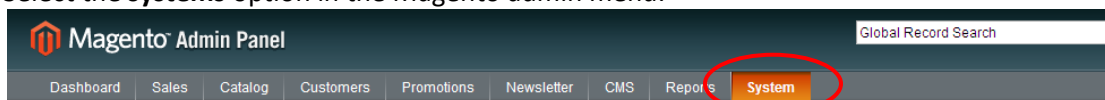
You can customize the UI functionality according to your needs, however - Celebros accepts no liability for any code changes performed under the “app\code\local\Celebros” directory by the account owner.

Do not edit or add to plug-in files under “app\code\local\Celebros” directory if you aim for correct extension functionality. If you wish to customize any code under it, please contact Celebros.

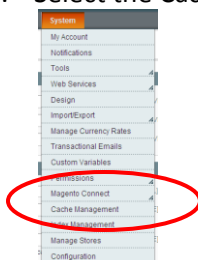
### Important note

After installing or updating your Magento plug-in you need to refresh the cache.

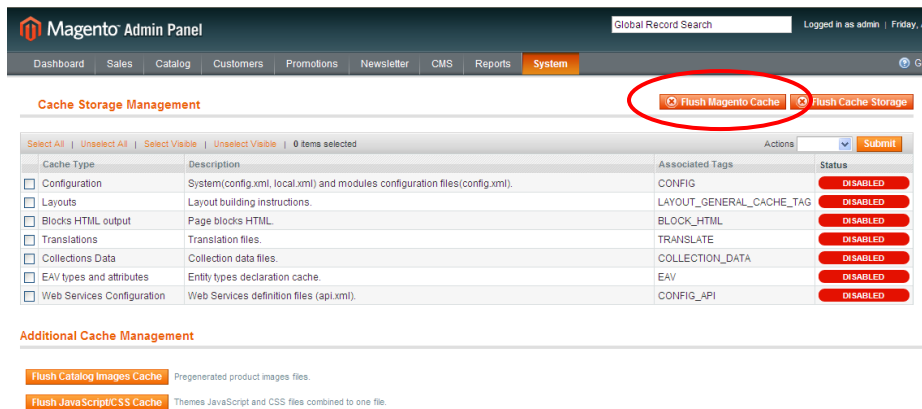
1. Select the **systems** option in the Magento admin menu:



2. Select the Cache management option:



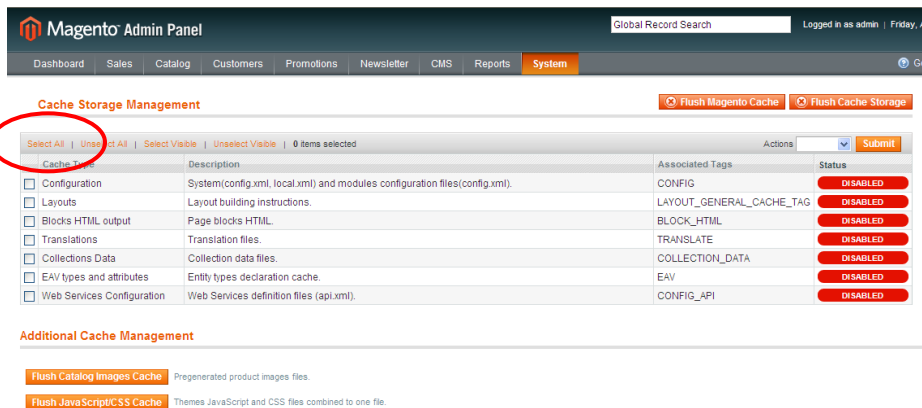
- The following screen will be displayed. Click the **Flush Magento Cache** button cache to complete the process:



The screenshot shows the 'Cache Storage Management' page in the Magento Admin Panel. At the top, there are two buttons: 'Flush Magento Cache' and 'Flush Cache Storage'. The 'Flush Magento Cache' button is circled in red. Below the buttons is a table with columns: Cache Type, Description, Associated Tags, and Status. The table lists various cache types such as Configuration, Layouts, Blocks HTML output, Translations, Collections Data, EAV types and attributes, and Web Services Configuration. Each row has a 'Status' column with a 'DISABLED' button. Below the table, there is an 'Additional Cache Management' section with two buttons: 'Flush Catalog Images Cache' and 'Flush JavaScript/CSS Cache'.

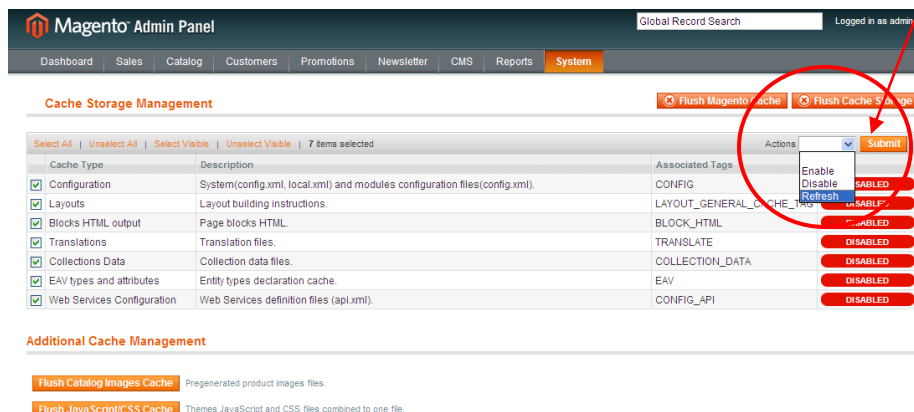
If you are using the Magento Plug-in version 1.3.2.1 follow this path:

- Click the Select all option which will check all the checkboxes:



The screenshot shows the 'Cache Storage Management' page in the Magento Admin Panel. The 'Select All' option in the 'Actions' dropdown menu is circled in red. The table below shows the same cache types as the previous screenshot, but now all checkboxes are checked, and the 'Status' column shows 'ENABLED' for all items. The 'Additional Cache Management' section is also visible at the bottom.

- From the action pull down menu select the "Refresh" option and click the Submit button:



The screenshot shows the 'Cache Storage Management' page in the Magento Admin Panel. The 'Refresh' option in the 'Actions' dropdown menu is circled in red, and the 'Submit' button is also circled in red. The table below shows the same cache types as the previous screenshots, but now all checkboxes are checked, and the 'Status' column shows 'ENABLED' for all items. The 'Additional Cache Management' section is also visible at the bottom.

- In order to complete the operation you need to log-out and then log-in again to the system.

## Salesperson Settings

Typing the following values is mandatory. Without this input your solution will not be activated:

The compulsory details requested in the general settings section allow you to connect to the *Celebros* Infrastructure and start working:

**Salesperson Settings** Save Config

**General Settings**

Host	<input type="text" value="dev6fe.celebros.com"/>	[STORE VIEW]
Port	<input type="text" value="6035"/>	[STORE VIEW]
Site Key	<input type="text" value="MagentoDEV"/>	[STORE VIEW]

Type the appropriate details in each field. These details will be given to you by your *Celebros* contact person.

Once you entered these values you can immediately view your solution as it is displayed using the **default** values in the system. This will give you the opportunity to actively explore your solution prior to changing default values, thus matching your changes to occurrences in your website you wish to change.

### Analytics Interface Server:

**Analytics Settings**

Analytics Interface Server	<input type="text" value="beautynet-qva.celebros-analytics.com"/>	[STORE VIEW]
	▲ The analytics interface server address	
Customer Id	<input type="text" value="MagentoDEV"/>	[STORE VIEW]
Secure Connection	<input type="text" value="No"/>	[STORE VIEW]
Data Collector DNS	<input type="text"/>	[STORE VIEW]

Type the path to your analytics interface server. This information will be provided by *Celebros* .

### Customer Id:

Type your Customer Id. This information will be provided by *Celebros* .

### Secure Connection:

Selecting No means the data containing your analytics info will be sent from the web server to the Celebros analytics servers using a non-secure connection. This is the default value.

Selecting Yes means your analytics info will be sent using a secure connection.

### Data Collector DNS:

This field is used in case the data collector's host name is different than <customer id.celbros-analytics.com>. This field will remain empty unless *Celebros* provides you with this data.

## Export data format settings

The information you will enter in this section pertains to you data file export practices:

Store View	English	[GLOBAL]
Value Delimiter	\t	[WEBSITE]
	<small>▲ (\t for tab)</small>	
Enclosed Value In	"	[WEBSITE]
	<small>▲ Warning! Empty value can cause problems with CSV format.</small>	
Type	FTP	[WEBSITE]
Absolute Path	/var/www/magento_CE_1501/var/export	[WEBSITE]
	<small>▲ E.g. /var/www/whosts/yourdomain.com/var/export</small>	
FTP Host	playground.ftp.express.celbros.com	[WEBSITE]
FTP Port	21	[WEBSITE]
FTP User	playground@celebroshq	[WEBSITE]
FTP Password	\$p1580	[WEBSITE]
Passive	No	[WEBSITE]
Enable Cron Catalog Update	Yes	[WEBSITE]
Salesperson Export Profile Id	7	[GLOBAL]
Cron Expression	0 0 ***	[GLOBAL]
	<small>▲ Cron expression syntax</small>	

**Store view:** In this field you need to select the language your data file is written in. If you select a language unrelated to the one your data file is written in, the search engine will not be able to do its job properly.

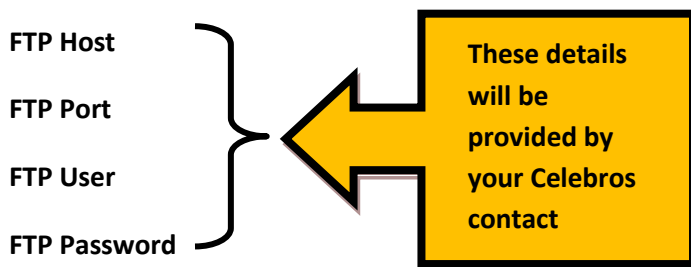
**Value Delimiter:** the character(s) used to separate values in your data file. The default value will be “,”. If your data is Tab delimited use “\t” to separate values.

**Enclosed value:** Use the default double quotes value for enclosing values. This is very important when working with CSV files.

**Type:** refers to your preferred location of exporting your data file. You can select FTP or File (the default value). If you selected “File” you should specify the path on your web server:

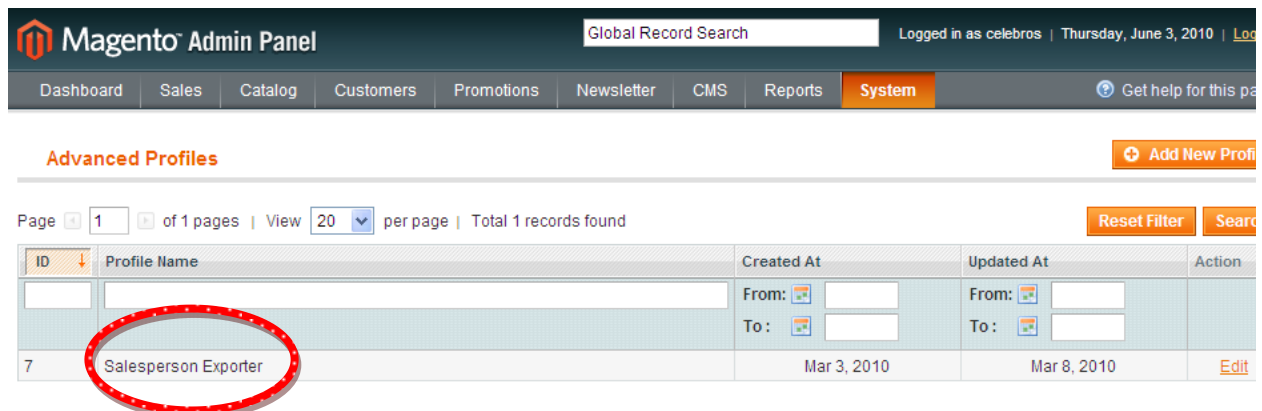
**Absolute Path:** the absolute path mapped to your data file’s location. The expected format here is: /<dir>[/<subdir1>/<subdir2>...] . For example: /var/www/vhosts/yourdomain.com/var/export.

**Please make sure the specified path is write permission enabled**



**Passive:** make sure to select the “No” option unless otherwise instructed by *Celebros* . This value is for internal use only.

**To manually export the file to the FTP or folder according to the type and path entered by you** access the following path: System -> Import/Export->Advanced Profiles (System -> Import/Export->Data Flow - Advanced Profiles in Magento CE 1.5). Double click on Salesperson Exporter, as shown in the following image:



Magento Admin Panel

Global Record Search

Logged in as celebros | Thursday, June 3, 2010 | Log

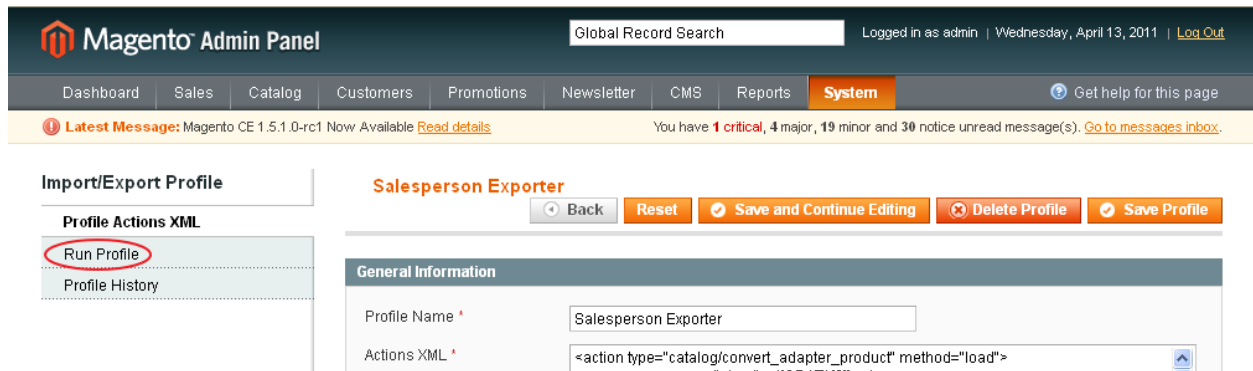
Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports **System** Get help for this page

**Advanced Profiles** [+ Add New Profile](#)

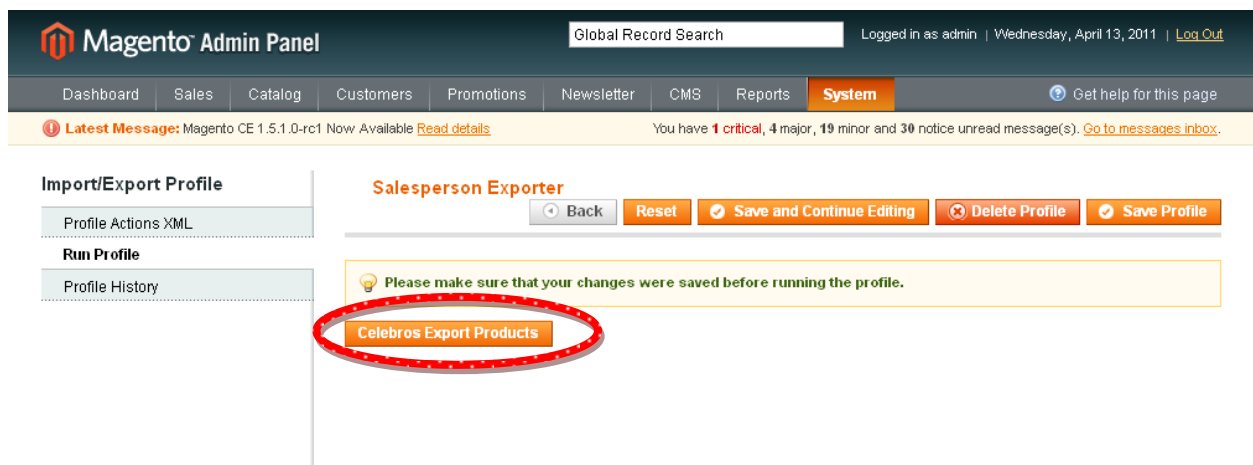
Page 1 of 1 pages | View 20 per page | Total 1 records found [Reset Filter](#) [Search](#)

ID	Profile Name	Created At	Updated At	Action
7	Salesperson Exporter	Mar 3, 2010	Mar 8, 2010	<a href="#">Edit</a>

Then double click on Run Profile, as in the image below:



Then double click on Celebros Export Products, as shown in the image below:



After clicking the “Celebros Export Products button the system will display the following message:

```
start/ Starting profile execution, please wait...
warning/ Warning: Please don't close window during importing/exporting data
load/ Loaded 0 records
save/ Saved successfully: "products.txt" 361 byte(s)
finish/ Finished profile execution.
```

Now, the exported data file will reside in the folder you specified in the Path settings. If you selected the FTP type the file will be also uploaded to the FTP.

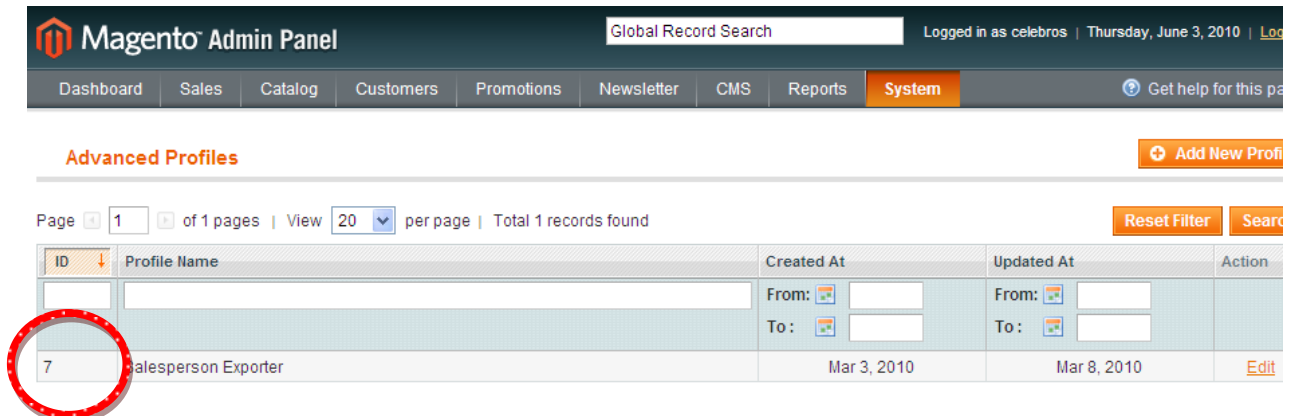
**To automatically export the file to the FTP or folder according to the type and path entered by you:**

**Enable Cron Catalog Update:** Select “Yes” if you’re using Unix Cron and No if you’re not. Configure your web server so that it runs a cron job (or scheduled task in Windows) that executes the *cron.php* script located in the root Magento directory.

An example of a valid command to execute is: `/usr/local/bin/php -q /home/domains/Celebros.starhost.co.il/public_html/cron.php`

**Cron Expression:** This field will be displayed only if you selected “Yes” in the Enable Cron Catalog Update field. For Cron Catalog Update you need to specify here the Cron expression. The Cron expression should not include the 6<sup>th</sup> parameter which refers to the command to be executed (which is implicitly set to the data export).

**Salesperson profile id:** This field will be displayed only if you selected “Yes” in the Enable Cron Catalog Update field. You can access this information by following this path: System -> Import/Export->Advanced Profiles (System -> Import/Export->Data Flow - Advanced Profiles in Magento CE 1.5). Enter the value presented under ID as shown in the image below.



The screenshot shows the Magento Admin Panel with the 'System' tab selected. Under 'Advanced Profiles', there is a table with one record. The ID '7' is circled in red.

ID	Profile Name	Created At	Updated At	Action
7	Salesperson Exporter	Mar 3, 2010	Mar 8, 2010	<a href="#">Edit</a>

## Result Display Settings

This part of the configuration setup will affect the way your search solution is displayed to customers:



Result Display Settings	
Alternative Products Message	<input type="text" value="We do not have {{query}}, but we thought you may be interested in {{new_query}} tags to display the search terms"/> [STORE VIEW]
Search Profile	<input type="text" value=""/> [STORE VIEW]
Page Layout	<input type="text" value="3 columns"/> [STORE VIEW]
Show Lead Question	<input type="text" value="None"/> [STORE VIEW]
Show Non Lead Questions	<input type="text" value="On top"/> [STORE VIEW]
Show Breadcrumbs	<input type="text" value="Yes"/> [STORE VIEW]
Display Images In Lead Question	<input type="text" value="Yes"/> [STORE VIEW]
Maximum Lead Answers	<input type="text" value="7"/> [STORE VIEW]
Maximum Non Lead Questions	<input type="text" value="4"/> [STORE VIEW]
Maximum Non Lead Answers	<input type="text" value="2"/> [STORE VIEW]
Maximum Non Lead Answers In Side Nav	<input type="text" value="1"/> [STORE VIEW]
Show Product Count In Lead Answers	<input type="text" value="Yes"/> [STORE VIEW]
Show Product Count In Non Lead Answers	<input type="text" value="Yes"/> [STORE VIEW]

### Alternative Products Message:

You can create **Alternative Products** campaigns in which the category the search term belongs to will be replaced by a substitute category. For example: a customer typed **Delonghi** in search box. The shop doesn't carry **Delonghi** products but it **DOES** carry **Kitchen aid** products which is a shame not to make use of, as shown in the alternative products campaign below:



The default message the system displays to the customer is: **We do not have {{query}}, but we thought you may be interested in {{new\_query}}.**

The values inside the double curly braces is a place holder for values the system automatically replaces

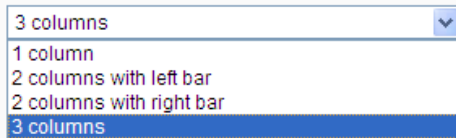
If you want to change this text you can type the new text in the **Alternative Products Message** field.

### Search Profile:

After deciding with *Celebros* on the search profile that fits you best, you will receive your Search Profile Name. Type the Search profile name in this field.

## Page Layout:

You can select from this field's pull down menu how many product columns will be displayed on a page. You can select between:

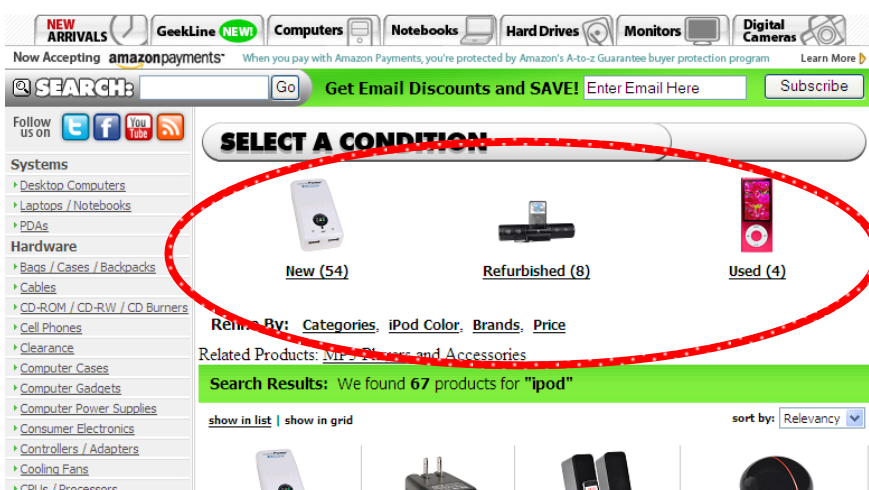


The bar refers to the refinements bar. The default is "3 columns".

## Show Lead Question:

When customers enter a very broad search term, the search engine might return an abundance of results that make this particular search action moot. By offering a leading question – a wizard-like interface which simulates a real sales person interacting with customers, you allow your customers to zoom in on their target products in the friendliest of ways, so make sure you activate this option when implementing the *Celebros* solution.

In this field you can select how to position your leading question on the page. The default is "On top". Positioning the lead question **On Top** will position it like this:



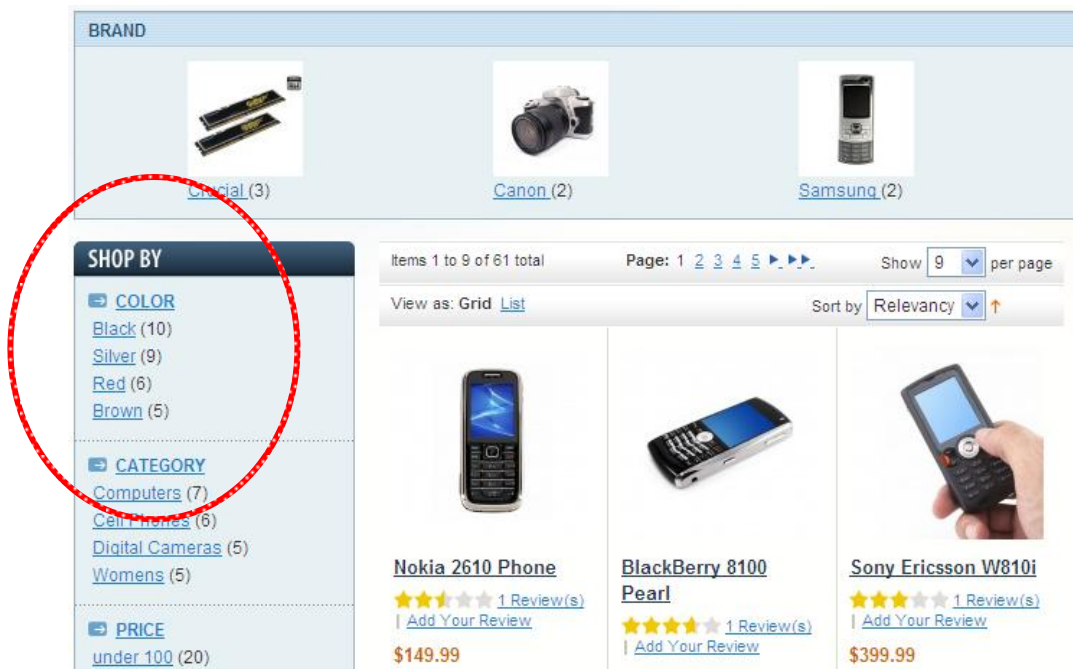
Selecting the **None** option will disable the lead question option for all search result pages. **Leading questions** are important for your understanding of customer's wishes. If you select to turn this option

off make sure the leading questions appear as **refinements** on the left hand menu, or - you might want to display leading question text only - without images.

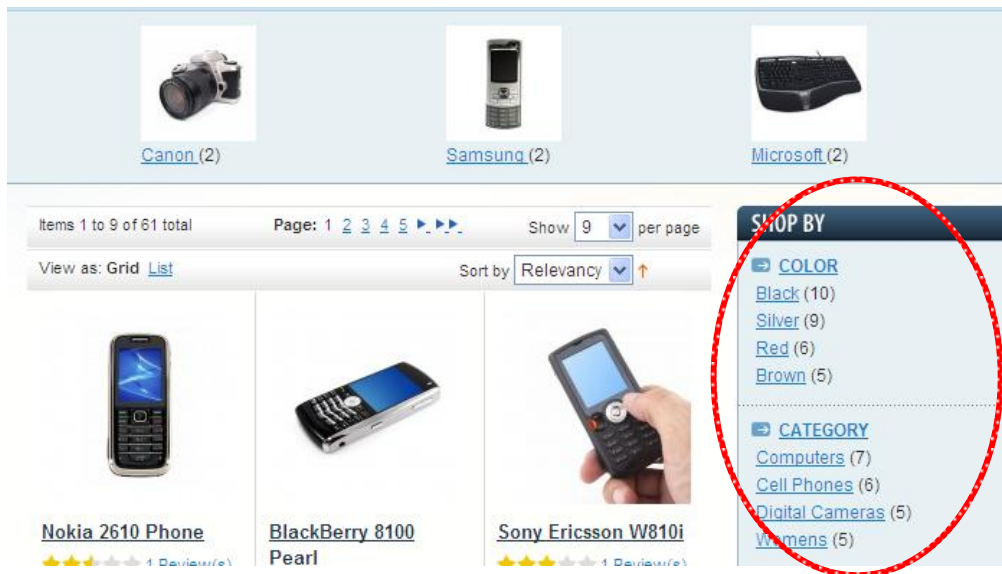
### Show Non Lead Questions:

In this field you can select how to display your non lead questions: the questions that offer further refinements but have a secondary impact in comparison with the lead question. The default is "On the left".

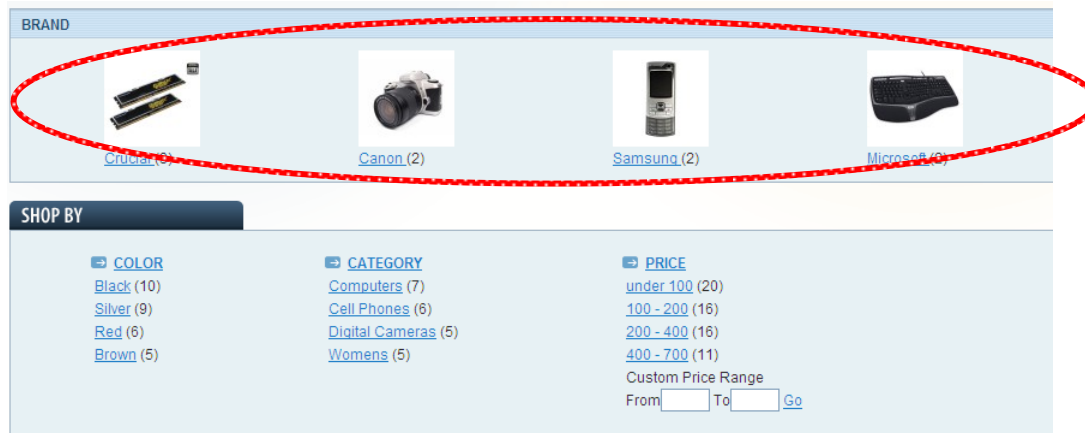
You can select to position these questions on the Left:



You can select to position these questions on the right:



You can select to position these questions On Top:

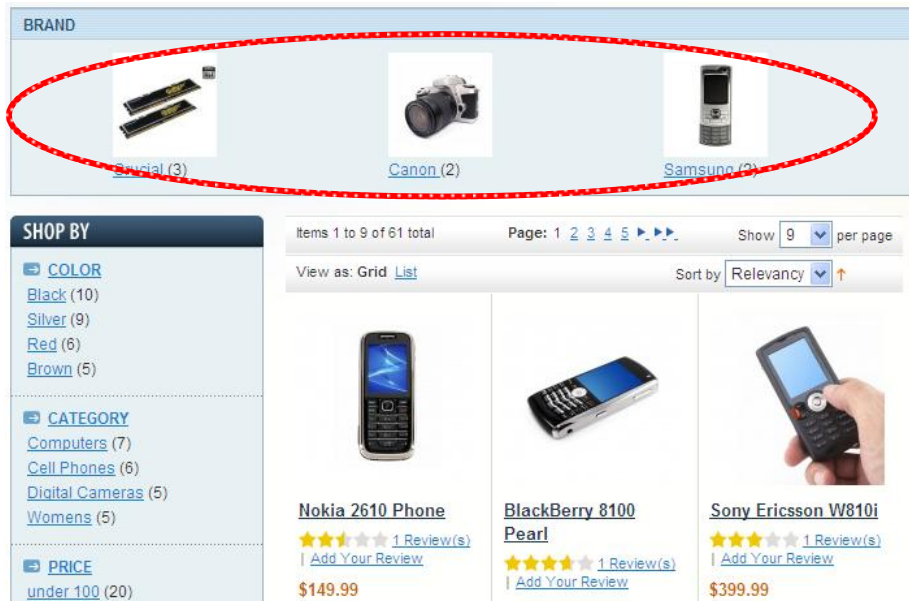


### Show breadcrumbs:

In this field you can select whether to display breadcrumbs on your search pages. It is highly recommended that you do. A breadcrumbs trail will help your site's visitors understand where they have been prior to the current page they are browsing. Then can then navigate easily between locations on their search path according to their results and preferences. The default selection will be "Yes".

### Display Images in Lead Question:

A picture is worth a thousand words. Incorporating images into search results is highly recommended since it helps visitors find what they want easily and quicker, especially if some of your main refinements are visual such as colors. The system's default value is "Yes".



Lead question  
with images

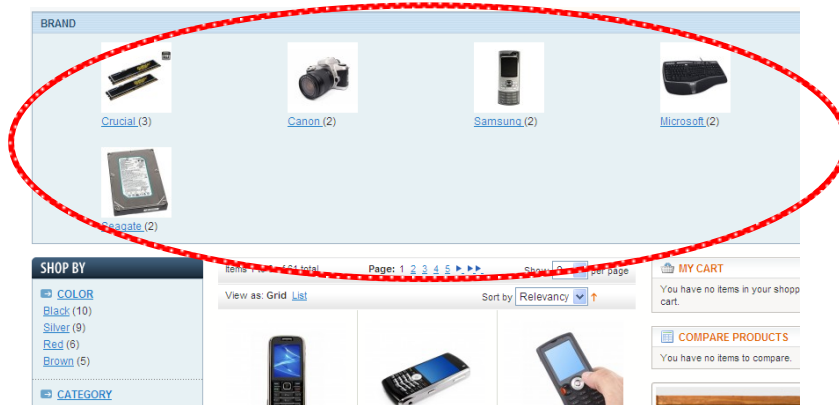


Lead question  
without  
images

### Maximum Lead Answers:

In this field you can select the maximum number of lead answers you want to be displayed on your search result page. In the example shown here it would have been best to enter 4 as the desired value

since a value greater than 4 resulted in two rows of answers (2<sup>nd</sup> row partially full) and the loss of important “real estate” on your search results page. The default value is set to 4.



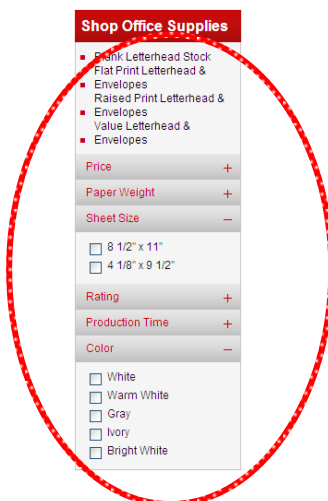
### Maximum No Lead Questions:

In this field you can select the number of maximum No Lead questions to be displayed. Take into consideration the position you selected for them in the **Show Non Lead Questions** field.

To avoid too much clutter which might confuse your client and which might also involve unnecessary scrolling you might want to consider entering values no greater than 4-5. The default is set to 4.

### Maximum Non Lead Answers:

In this field you can select the number of maximum Non Lead answers to be displayed under the Lead questions you worked with in the previous section. Again, to avoid too much clutter which might confuse your clients and might also involve unnecessary scrolling you might consider entering values no greater than 4-5 (the system’s default is set to 10). If you find it necessary to include a larger number of Non Lead Answers you might also consider the following method of display:



In this way the customer can see all the lead questions easily, then use refinements according to his needs without having to scroll and search through too many options.

### Show Product Count in Lead Answers:

This field allows you to choose whether to display product count next to the lead answers. The default is “Yes”.



It is recommended to select the “Yes” option. This will greatly help your customers in determining how far in to the search results they want to dive. This is a great indicator for them to narrow down their search if the current search they made yielded too many results for it to be effective, or if their search yielded too few answers to allow a good shopping experience.

### Show Product Count in Non Lead Answers:



The same applies for this choice. If you choose not to display product count in the Lead answers make sure you make it available in the Non Lead Answers.

The system's default is “Yes”.

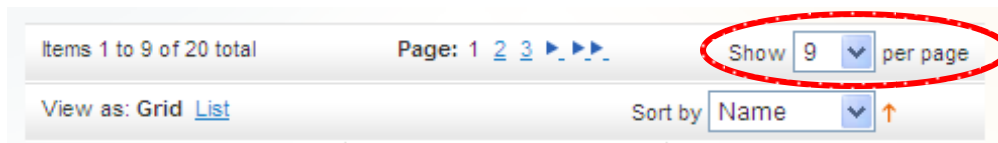


Page Size Selector Type	<input type="text" value="Links"/>	[STORE VIEW]
Sort Selector Type	<input type="text" value="Links"/>	[STORE VIEW]
Page Navigator Type	<input type="text" value="Textual"/>	[STORE VIEW]
Go To Product Page On One Result	<input type="text" value="No"/>	[STORE VIEW]

### Page Size Selector Type:

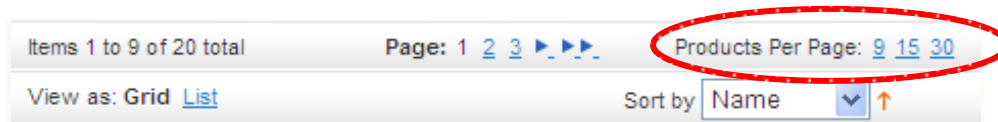
In this field you can select the UI type where customer can adjust the number of items displayed on each page. The default will be “Drop down”

The dropdown option will look like this:



Items 1 to 9 of 20 total      Page: 1 2 3 ...  
View as: Grid [List](#)      Sort by: Name ↑  
Show 9 per page

The Links option will look like this:

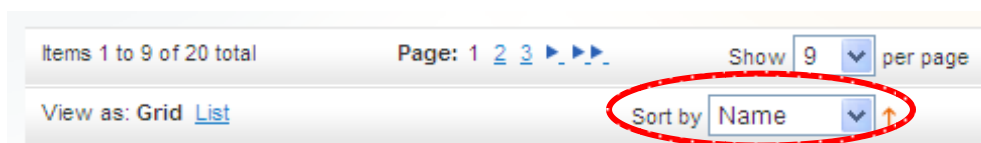


Items 1 to 9 of 20 total      Page: 1 2 3 ...  
View as: Grid [List](#)      Sort by: Name ↑  
Products Per Page: 9 15 30

### Sort Selector Type:

In this field you can select the UI type where customer can adjust the sorting of items displayed on each page. The default will be “Drop down”.

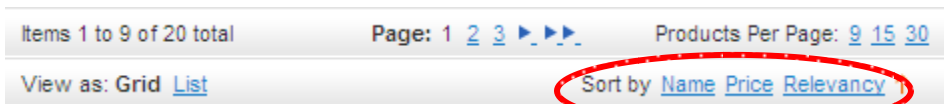
The dropdown option will look like this:



Items 1 to 9 of 20 total      Page: 1 2 3 ...  
View as: Grid [List](#)      Show 9 per page  
Sort by: Name ↑

The Links option will look like this:





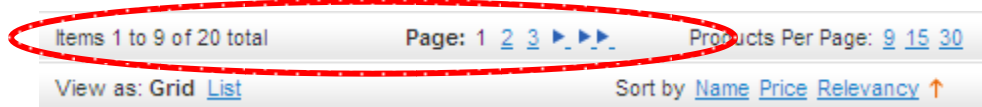
### Page Navigator Type:

In this field you can select the UI type where customer can navigate pages. The default will be "Multipage".

Textual will look like this



Multipage will look like this:



### Go To Product Page On One Result:

If a search retrieves only 1 result you might consider automatically directing the customer to this product's page instead of displaying a single result in the search result page.

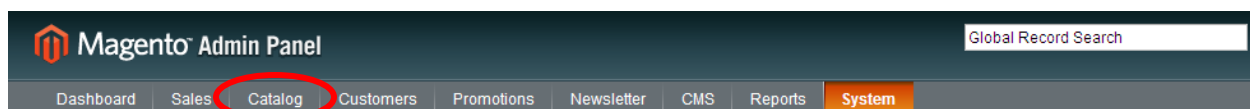
This practice will help you turn a situation with limited sales prospects into a possible buy by giving more focus to this single result while allowing them to continue shopping if they wish to do so.

The default is set to "Yes".

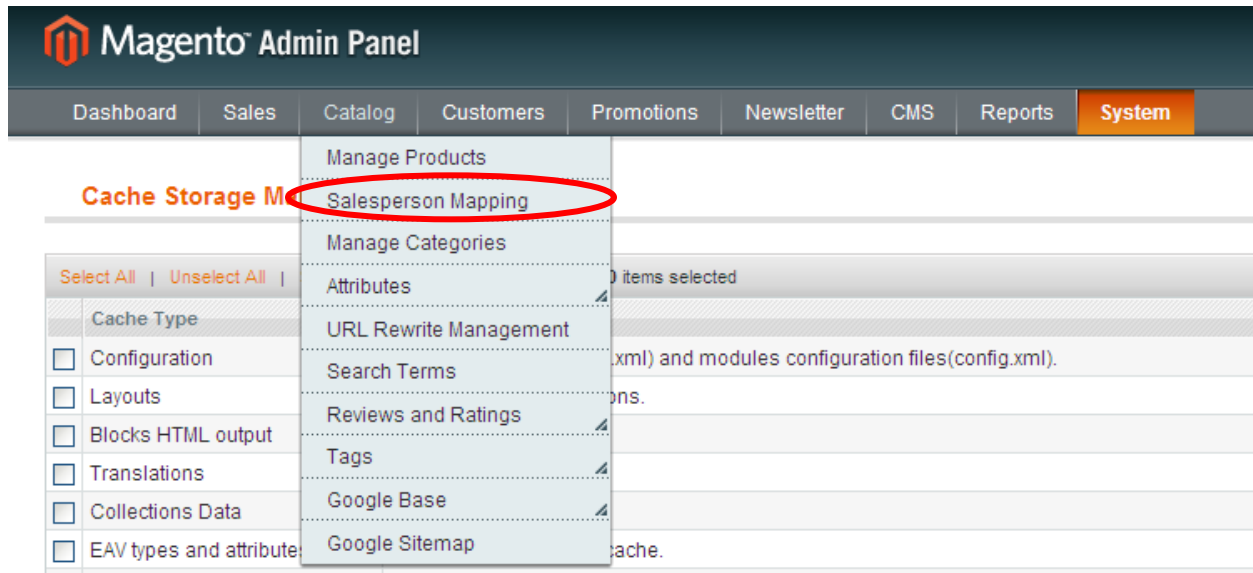
## Data file field mapping

If your data file column headers differ from the default Magento mandatory column header values, then field mapping is required. The field mapping table translates the default Magento values into your data file values so that your products will be properly displayed in the Celebros result page.

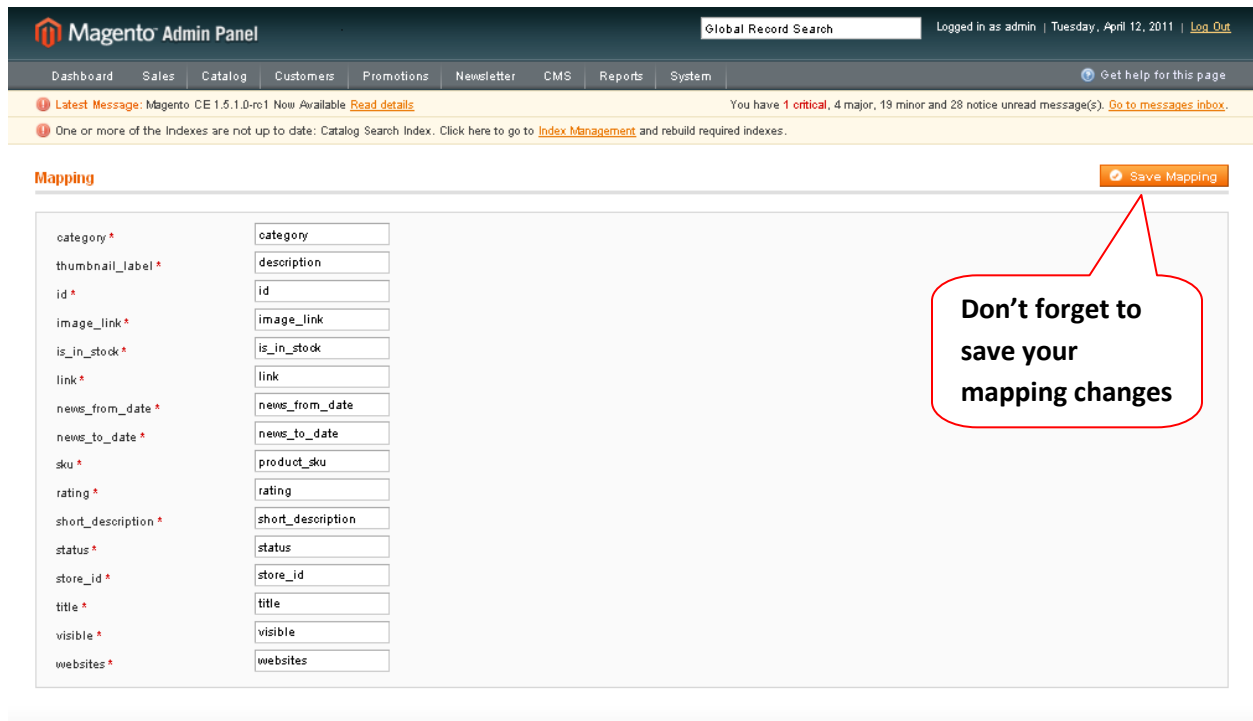
To use the field mapping option click the "Catalog" option in the Magento admin menu:



Click the Salesperson Mapping option:



In the following page you will be able to list the column headers you use in your data file and how they correspond to the Magento column headers:



Don't forget to save your mapping changes once you're done.

## Search results front end editing

If you wish to make changes in your search results front end you can locate the Celebros search results by following this path:

1. Go to Magento downloaded folder
2. Open the App folder
3. Open the Frontend folder
4. Select your interface folder
5. Open your theme folder
6. Open the template folder
7. Open the Salesperson folder in which you can find the search results HTML code