

INTEGRATION OF THE STRANDS RETAIL SERVICE PLUG-IN FOR MAGENTO

This is the installation guide of the Strands Retail extension for Magento.

Step 1: Create a Free Account at Strands Retail

Go to <http://retail.strands.com/free-trial/> to create your free account.

IMPORTANT: Your account will be valid for 30 days, and does not require that you enter payment information (a credit card), so there is no risk to you. During this 30-day period, you'll have pick a pan and enter payment details in order to continue with service.

Once you create a Free Trial account, you will then receive a registration email containing the information listed below, which you will need in order to install the extension:

- * Customer API id
- * Customer Validation Token
- * User
- * Password

Step 2: Activate the Strands Retail extension for Magento

You can now activate your newly installed Strands Retail extension by entering the credentials provided to you by Strands.

Using your Magento shop's admin interface go to the module admin interface by following "System -> Configuration -> Sales -> Strands Retail".

Enter the Strands API ID and Strands Customer Validation Token provided to you by Strands in the activation email you received when registering. Alternatively, you can find them in the "my account" section of the Strands Retail Dashboard: <http://retail.strands.com/account/retrieve/>

Once you have entered the credentials, select the "Enable: Yes" option and click on "Save config".

****TIPS**:**

* If after installing you do not see the Strands Retail extension in the list of modules at "System -> Configuration -> Advanced -> Advanced", you may need

to flush your Magento instance's cache. Alternatively, you can just remove all files located in the directory "public_html/var/cache" on your webhost's account.
* You may get a 404 error when you try to access Strands Retail module configuration page. If this happens, you may need to enable permissions for the "Administrators" role.

Just go to "**System -> Permissions -> Roles**" and save the permissions for the administrators.

* Should you still not be able to see the Strands Retail module configuration page, log out of your Magento shop's administration interface and then log in again. This usually fixes many problems.

Step 3: Provide your catalog information

You can upload your product catalog 2 ways:

- A Enable a feed URL
- B Scheduled uploads via FTP

You can monitor all your catalog uploads at:
<http://retail.strands.com/catalog/history>

Please, note that uploads may take some time. This depends mostly on the size of the catalogs.

A. Enable feed URL

When this option is active, Strands Retail will be able to fetch the catalog pages from your Magento Instance. Please note that your Magento instance has to be reachable from outside for this mechanism to work.

Just click on "**Save config**" in order to enable it.

The catalog will be fetched periodically; you can control when at how often at Strands Retail dashboard: <http://retail.strands.com/catalog/format/>

****TIPS****

* If you are experiencing performance problems on your Magento instance, please ask Strands Retail Support team (support-sbs@strands.com) to lower the size of the pages fetched from your end.

Scheduled uploads via FTP

In order to use this option you need to enable cron in your Magento instance. Besides, you need to configure the extension with your credentials on Strands FTP server. Click on "Save config" to save changes.

You can try any of these options

Schedule a time to upload the catalog files daily

Configure the time of the day when you want the catalog to be pushed to Strands end. Since this process may consume several computational resources we advice you to choose a time of the day when your Magento instance is not too loaded with requests (e.g. 2:00 a.m.). Click on "Save config" to save changes.

Upload the catalog files immediately

Check the "Upload now" box and click on "Save config" in order to instruct the extension to create the catalog pages and push them to Strands end. Please, note that uploads may take some time. This depends mostly on the size of the catalogs. You can monitor all your catalog upload at:

<http://retail.strands.com/catalog/history>

Step 4: Insert recommendation widgets

The final step is to insert recommendation widgets on the pages. Please, note that the performance of a recommendation widget depends strongly on its visibility in the page.

You can access a list of available widgets on Strands Retail dashboard:

<http://retail.strands.com/tpl/website>

A Strands recommendation widget is identified by a template id (tpl). For example: "HOME-1", "prod_2", "cms_index_index", etc.

The Strands Retail dashboard provides you wizards to control both the logic and the look & feel of each widget. If "look & feel" wizards doesn't match your desired design you can check our documentation to write your own rendering function:

<http://retail.strands.com/resources/javascript-library/#advRenderer>

Strands Retail extension has some predefined templates bound to each Magento page. This is what we call **default templates**, and they are:

- * cms_index_index: for the homepage
- * catalog_category_view: for the category pages

- * catalog_product_view: for the product pages
- * checkout_cart_index: for the cart page
- * checkout_onepage_success: for the order confirmation page
- * checkout_multishipping_success: for the order confirmation page (when multishipping is used)

Strands Retail extension provides a Magento block displaying a recommendation widget (recwidget) that you can place wherever you want. You can insert as many widgets as you want.

There are three ways to insert widgets in pages:

- * Using the CMS Editor
- * Editing a layout file (XML)
- * Editing a template file (phtml)

Please, note that not all of them work for every scenario.

Use the CMS editor

This method is valid for all the pages you can edit with the CMS editor, for example in pages like homepage. We have to add a recwidget block.

- * To get the default template:

```

{{block type="strands_recommender/recwidget"
template="strands/recommender/recwidget.phtml"}}

```

- * To get any other template:

```

{{block type="strands_recommender/recwidget"
template="strands/recommender/recwidget.phtml" tpl="HOME-1"}}

```

Edit a layout file

This method is valid for those pages whose layout is controlled by a layout XML file, for example catalog.xml or checkout.xml. Open the corresponding XML file and add a recwidget block:

- * To get the default template:

```

<block type="strands_recommender/recwidget"
template="strands/recommender/recwidget.phtml"/>

```

- * To get any other template:

```

<block type="strands_recommender/recwidget"
template="strands/recommender/recwidget.phtml"
name="strands_recommender.mywidget"
as="strands_recommender_mywidget">
    <action method="setData">

```

```
        <name>tpl</name>
        <value>PROD-2</value>
    </action>
</block>
```

Edit a phtml file. You have to add the raw code to a phtml template file.

Sometimes you need to insert the recommendation widget within a given block. In that case, you have to edit the corresponding .phtml file. For example:

wrapper.phtml

("frontend/base/default/template/catalog/product/view/options/wrapper.phtml")

* To get the default template:

```
<div class="strandsRecs" tpl="{{(auto)}}" item="{{(auto)}}"></div>
```

* To get any other template:

```
<div class="strandsRecs" tpl="PROD-1" item="{{(auto)}}"></div>
```

Also, never forget that we are here to help you at every step along the way if you need us. Don't hesitate to contact us at [**support-sbs@strands.com**](mailto:support-sbs@strands.com)