

FACT-Finder® for Magento Installation Manual

Three steps for more sales in online shops.

Document version: 15-Nov-2011

Website: www.fact-finder.com

Blog: www.fact-finder.com/blog/

Twitter: http://twitter.com/#!/fact_finder

Facebook: www.facebook.com/eCommerce.search

About FACT-Finder

FACT-Finder is the perfect solution for search, navigation, and merchandising in online shops. Being error-tolerant and independent of language, FACT-Finder quickly leads shop visitors to the right products, increasing usability, conversion rates, and turnover.

More than 1,000 online shops successfully use FACT-Finder world-wide. This market expansion positions FACT-Finder as the European market leader for search and navigation in online shops. FACT-Finder is known for cutting-edge search algorithms, intelligent categories and faceted navigation, error-tolerance, language independence, and high-performance functions for merchandising and analysis.

If you are not yet a FACT-Finder customer, we would like to invite you to a free 30-day trial. Please call us at **+44 20 30 08 7715** or write an e-mail at info@fact-finder.com.

About this extension

FACT-Finder's Magento extension makes integrating FACT-Finder into your Magento-based online shop very easy. It takes just a few steps to automatically download and install the module from the Magento Connect download area. This document will help you implement FACT-Finder's numerous search features, including features specific to the FACT-Finder Magento module, quickly and easily.

The FACT-Finder module has been developed and tested for all Magento versions, including:

- **Community Edition 1.4.1.1 +**
- **Professional Edition 1.9.0.0 +**
- **Enterprise Edition 1.9.0.0 +**

Installing FACT-Finder Magento module

This manual shows how to install and set up the Magento FACT-Finder module in just three steps. Programming skills are not necessary, but some basic knowledge about Magento configurations may facilitate the installation.

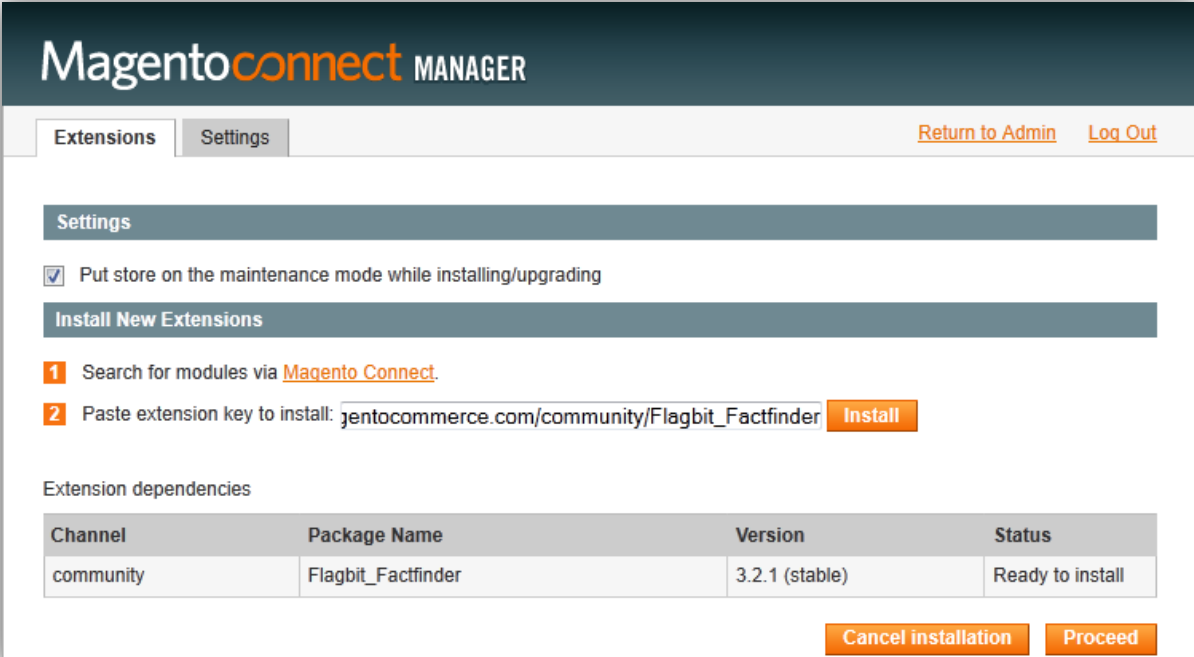
If you have questions or problems, please contact our technical support: **+49-7231 - 125 97 0**, or write an e-mail to support@fact-finder.com.

1. Downloading the module from Magento Connect

The download process may easily be handled by the Magento Connection Manager¹, which may be found in the system tab of the backend menu². In the form shown below, you can install new modules by entering their extension keys. Please enter the following FACT-Finder extension key:

`http://connect20.magentocommerce.com/community/Flagbit_Factfinder`

in Magento Connect and then click on "Install"³.



The screenshot shows the 'Magentoconnect MANAGER' interface. At the top, there are tabs for 'Extensions' and 'Settings', and links for 'Return to Admin' and 'Log Out'. The 'Settings' tab is active, showing a checkbox for 'Put store on the maintenance mode while installing/upgrading'. Below this is the 'Install New Extensions' section. It contains two numbered steps: 1. 'Search for modules via [Magento Connect](#).' and 2. 'Paste extension key to install: [Install](#)'. Below the steps is a table for 'Extension dependencies' with columns 'Channel', 'Package Name', 'Version', and 'Status'. The table shows one entry: 'community' channel, 'Flagbit_Factfinder' package name, '3.2.1 (stable)' version, and 'Ready to install' status. At the bottom right, there are two buttons: 'Cancel installation' and 'Proceed'.

Channel	Package Name	Version	Status
community	Flagbit_Factfinder	3.2.1 (stable)	Ready to install

¹ May be available only in the Magento Community Edition.

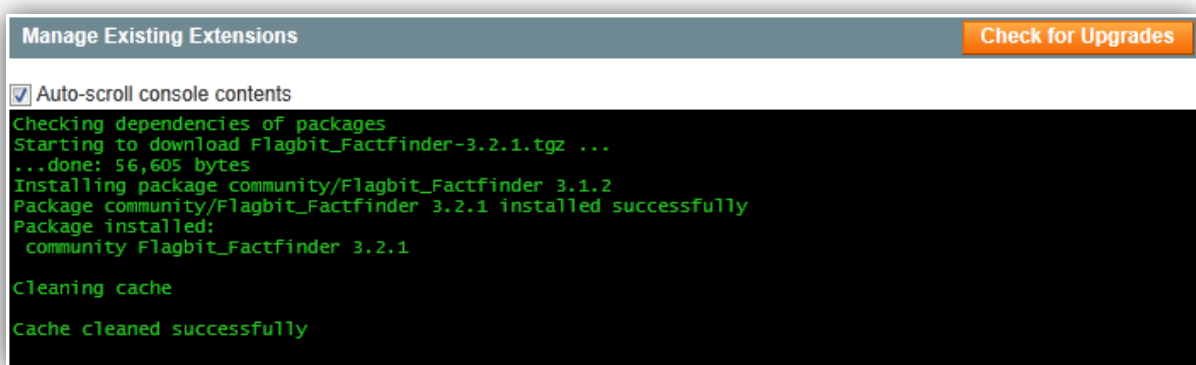
² You may need to verify your user name and password to start the Magento Connect Manager.

³ In this manual, we assume that the Magento Connect Manager 2.0 is used, which was introduced in version 1.5.0.0 (Community Edition) or 1.10.0.0 (Enterprise Edition). For Magento Connect Manager 1.0, the extension key is the following: magento-community/Flagbit_Factfinder.

Magento will now connect to the Magento Connect server, and lists all modules necessary for the installation. Normally a display window as shown above will appear. The version numbers may differ with current changes. If you then select "Proceed", the Magento Connect Manager will start downloading the necessary files and subsequently will perform the installation.

To avoid problems in carrying out this step, the web server needs sufficient write permissions to the Magento folders. If the message "Warning: Your Magento folder does not have sufficient write permissions." is displayed at the top of the form, please verify your settings or contact your system administrator, if needed.

The Magento Connect Manager now proceeds to the bottom of the page and shows a protocol of the downloading or installation process. The following screenshot shows an example of a successful installation.



If the installation is displayed as having been successful, then the installation process via Magento Connect was successful, and you may return to Magento's administration interface.

2. Configuring the module

After returning to the admin interface, you need to configure the FACT-Finder module for service by switching to the Magento configuration interface, which may be found in the menu under System -> Configuration⁴.

A new item has been added within the configuration area to the catalogue section in the menu on the left side of the window. After choosing the FACT-Finder tab in the catalogue section, the following window will be displayed⁵.

FACT-Finder [Save Config]

FACT-Finder Access Data

Enabled	Yes	[STORE VIEW]
Server URL	magento.fact-finder.de	[STORE VIEW]
Server Port	8080	[STORE VIEW]
Context Name	FACT-Finder66 <small>▲ Name of the FACT-Finder application</small>	[STORE VIEW]
User Name	magentoTest <small>▲ User name for authentication</small>	[STORE VIEW]
Password	*****	[STORE VIEW]
Channel	test <small>▲ FACT-Finder can provide multiple search indexes, each represented by a "channel". Leave empty to use the default channel.</small>	[STORE VIEW]
Language	en <small>▲ Some text strings come directly from FACT-Finder. Enter the language code here. Leave empty to use the language specified by the user's browser.</small>	[STORE VIEW]
Authentication Type	advanced	[STORE VIEW]
Advanced Authentication Prefix	FACT-FINDER <small>▲ The advanced authentication post- and prefix are only used when the authentication type is "advanced".</small>	[STORE VIEW]
Advanced Authentication Postfix	FACT-FINDER	[STORE VIEW]

FACT-Finder Export Configuration

Export images and deeplinks	No	[STORE VIEW]
Track "Add to cart" events	Yes	[STORE VIEW]
Track checkout	Yes	[STORE VIEW]

FACT-Finder Config Data

Product Identifier	Product ID (default)	[STORE VIEW]
Use Proxy for Suggest	No	[STORE VIEW]
Debug Log	No	[STORE VIEW]
Use Fact-Finder for Product Listing Navigation	No	[STORE VIEW]
Use Fact-Finder for Product Upsells	No	[STORE VIEW]
Use Fact-Finder for Product Crosssells	No	[STORE VIEW]

Each of the options shown will be treated separately in the following section. After all options have been properly set, save the configuration by clicking on "Save Config" in the upper right corner of the form.

⁴ During installation, the module adds new access rights to the system. If the configuration utility or the FACT-Finder area within the utility are not displayed, you may need to log out and log back into the admin interface, because the system reloads the configuration data during the login process.

⁵ Depending on the settings, the option group "General Settings" may be closed. Open the option group by clicking on the green bar.

3. Using the new options

At this point, the installation has already been completed; you may now take advantage of FACT-Finder's new capabilities. In the following, each of the configuration options will be described briefly below.

FACT-Finder Access Data

Enabled	Shows whether the FACT-Finder module is currently active or not. With multi-store systems, it may be activated for certain areas and deactivated in others. When enabling the module, a basic module test will be performed, such as checks regarding incompatibilities with other modules.
Server URL	URL of the FACT-Finder server, for example, "magento.fact-finder.de".
Server Port	Server port of the FACT-Finder server, such as "8080".
Context Name	Search context for the current shop. Each store view normally has its own search context.
User Name	User name for communicating with the FACT-Finder server.
Password	Password for communicating with the FACT-Finder server.
Channel	Multiple search indexes may be stored within one FACT-Finder server. Each channel offers access to one of those indexes.
Language	During transmission of search results, the FACT-Finder system also transfers text information. The Language input box permits selecting the language for this text. If no language is selected, FACT-Finder will automatically provide the language which is preferred by the browser.
Authentication Type	The Authentication Type defines the security level during transmission of FACT-Finder information between the shop's web server and the FACT-Finder server. It is recommended to select the level "advanced". The level must correspond to the configuration in FACT-Finder.

Advanced Authentication Prefix	Security certificate for transmissions between the web server and the FACT-Finder server. Only applies for authentication type "advanced", and must correspond to the setting on FACT-Finder pages.
Advanced Authentication Postfix	Security certificate for transmissions of information between the web server and the FACT-Finder server. Only applies for authentication type "advanced", and must correspond to the setting on FACT-Finder pages.

FACT-Finder Export Configuration

Export Images and Deeplinks	Determines whether images or deeplinks should be determined during the export and whether they should be transferred to FACT-Finder. This allows the automatic completion to display images and direct links to the results of the current search during the entry. However, this option may lead to a higher use of the server's capacity during the export.
Track Shopping Basket Events	Determines whether information should be collected and transferred to FACT-Finder telling which products the users put into the shopping basket. This improves search results as well as up-selling and cross-selling entries.
Track Sold Products	<p>Determines whether information should be collected and transferred to FACT-Finder telling which products the users put into the shopping basket. This improves search results as well as up-selling and cross-selling entries.</p> <p>WARNING: For the transmission of products sold to FACT-Finder, the Magento-CronJob mechanism must be working. In the following, you will find an explanation of how to install it.</p>

FACT-Finder Config Data

Product Identifier	Defines which product attribute should be used to identify each product. Options are the product ID or its stock keeping unit.
Use Proxy for Suggest	Specifies whether JavaScript should be sent to FACT-Finder directly, or via the web server, to get keyword suggestions.

Use FACT-Finder for Layered Navigation	<p>If this option is enabled, Magento gets each entry of the Layered Navigation directly from FACT-Finder. This leads to a higher quality of the entries and better performance.</p> <p>WARNING: Enabling this option may cause additional costs.</p>
Use Proxy for Automatic Completion	<p>Specifies whether JavaScript should be sent to FACT-Finder directly, or via the web server, to get keyword suggestions.</p>
Use FACT-Finder for Up-sellings	<p>In general, up-selling items are displayed on the product details page in order to suggest other products that could be interesting for the user. By enabling this option, the standard upselling display is filled with products by FACT-Finder's Recommendation Engine.</p> <p>For the optimal use of the Recommendation Engine, you should enable the extended tracking mechanisms (Track Shopping Basket Events and Track Sold Products).</p>
Use FACT-Finder for Cross-sellings	<p>Cross-selling items are generally displayed at the shopping basket page in order to suggest other products that could be interesting for the user. By enabling this option, the standard cross-selling display is filled with products by FACT-Finder's Recommendation Engine.</p> <p>For the optimal use of the Recommendation Engine, you should enable the extended tracking mechanisms (Track Shopping Basket Events and Track Sold Products).</p>

Frequent problems and questions

How can I verify if my FACT-Finder settings are working?

A first verification is already carried out during configuration. Once you enable the FACT-Finder search in the configuration and save the settings, the module will carry out a test search in the background. If this test search could not be carried out successfully, then a message is displayed; in most cases, the reason for this problem is an incorrect setting. You can also use this mechanism later to verify whether everything is fine just by sending the configuration again.

The configuration shows that everything is fine. But the frontend is showing Magento's standard search. What is wrong now?

The FACT-Finder module has been adapted closely to the Magento standard. For this purpose, some functions have intentionally been changed, but in most cases we have used Magento's standard HTML templates. This should normally enable FACT-Finder to replace and improve the search results immediately after installation.

If FACT-Finder's output is not displayed, this may have several causes, most of which are connected with customisation in the particular Magento entity. The two most probable possibilities are:

- Other modules have been installed in Magento, changing the same functions, but which are favored during processing. These other modules must either be deactivated or a developer must make adjustments.
- The layout and/or the templates have been changed in Magento, so that FACT-Finder's logic is no longer selected. The templates must either be adjusted, or the templates/layouts must be reset to the system standard. You can test this case by deactivating the shop-specific themes in the tab General -> Design in the system configuration and carrying out a new test.

How do I have to set the Cron-Job in order to activate order tracking?

Cron-Jobs help you complete recurring tasks. Magento offers the possibility to do several jobs via one central Cron-Job. You must have your (Linux) operating system regularly process the file cron.php with PHP. You can assure this by executing the following command in the command line:

```
crontab -e -u www-data
```

Crontab opens an editor helping you adjust the Cron-Job definitions in the Cron-Job index. The parameter -e opens edit mode, helping you to see and change existing jobs as well as add new ones. The second parameter -u www-data opens the jobs of the user www-data. For www-data, you should enter the user of your web server, so that the jobs can be executed with the respective rights later.

In the editor which is then displayed, please enter the following line:

```
* * * * * /usr/bin/php /var/www/cron.php
```

This command will open the above mentioned cron.php every minute⁶ and therefore also start and execute the FACT-Finder job. Please keep in mind to adjust the path leading to php (in this example: /usr/bin/php) and Magento (in this example: /var/www) to fit your system, if needed.

Once you save this setting and close the editor, the Cron-Job should automatically be installed and activated. In order to verify whether everything is working, you can either check this in your Cron-Log, when activated, or search for current entries in the index cron_schedule of your Magento data base by using phpMyAdmin – if those entries exist, the job will be started correctly.

If you have further questions, please contact your system administrator.

We wish you plenty of success and
an excellent conversion rate!

Your FACT-Finder team

⁶ The five stars symbolize a timed schedule which helps you define minutes, hours, days, months, and weekdays for execution. In this case, the job will be carried out at those optionally defined values, i.e. every minute. It is generally recommended to retain these settings.