KLEVU

Klevu Onboarding Shopify & Shopify Plus (All plans)

14 day playbook

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Introduction

Implementing a new site search integration can often seem like a daunting task.

It's normal to think that getting completely up and running with a powerful search service like Klevu will take weeks and even months. In fact, on average, the implementation time of our competitors can be upwards of 6 months in order to get a fully personalised search service configured and running.

There can also often be new terms to learn such as natural language processing (NLP), machine learning and automated enrichment. Don't worry though, we've got you! We've created a simple onboarding plan for Shopify and Shopify Plus merchants to guide you through your trial period - the *'14 Day Playbook'.*

As you dive into our onboarding guide, you will find that it is the key to a successful deployment.

Through the 14 days you will be introduced to products and tools that will develop and refine your search strategy and most importantly, effectively grow your business.

So why did we create this '14 Day Playbook'?

- We are committed to a fast integration process so you can see the positive effects of Klevu on your site.
- We are here every step of the way! We will make sure you've got everything up and running - just the way you want.
- Our mission is to help you to increase engagement and conversion on your site

Most of our customers see a lift in conversions within just a few days of going live and we want that for you too.

The framework you're about to learn includes a two-week product and process training. However, merchants should continue to learn even after the onboarding process ends.
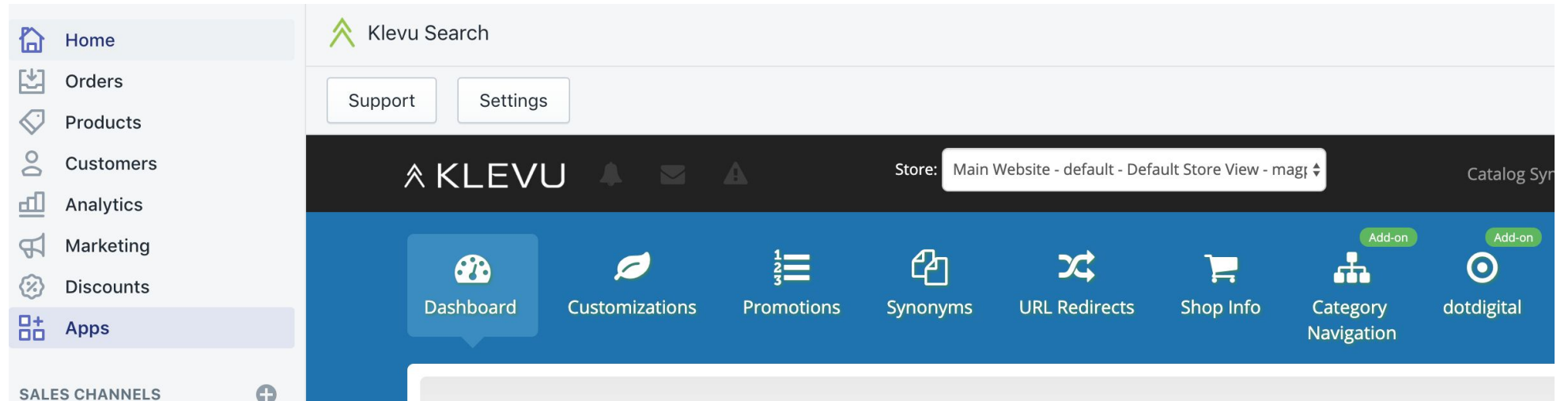
Feel free to tailor this framework to the needs of your company and your team so you have the most effective trial period.
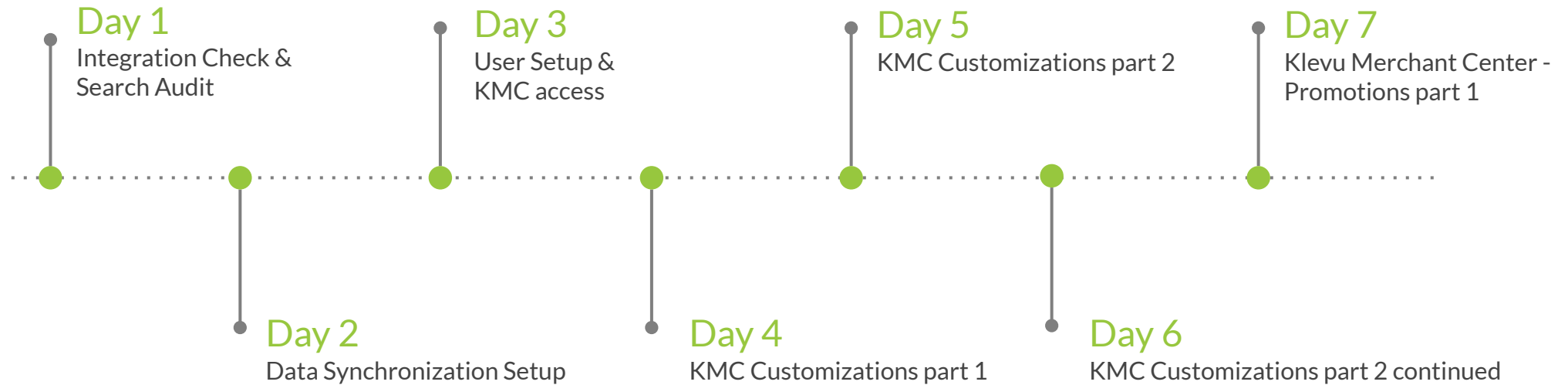
Configuration required

In order to implement Klevu search within your Shopify or Shopify Plus site, all configuration required can be found within the Shopify admin under the Klevu Merchant Center (KMC) within >apps >Klevu Search.

Go Live Timeline - Week 1

Day 1
Integration Check &
Search Audit

Day 2
Data Synchronization Setup

Day 3
User Setup &
KMC access

Day 4
KMC Customizations part 1

Day 5
KMC Customizations part 2

Day 6
KMC Customizations part 2 continued

Day 7
Klevu Merchant Center -
Promotions part 1

Go Live Timeline - Week 2

Day 8
KMC Promotions part 2

Day 9
KMC Synonyms

Day 10
KMC URL Redirects

Day 11
KMC Overall Search Statistics

Day 12
Integrating Google Analytics with Klevu

Day 13
Optional Extras

Day 14
Go Live Checklist

Day 1 - Integration Check and Search Audit

Difficulty: Easy

Time required: 2 Hours

Day 1 - Integration Check and Search Audit

The first step in the process of getting Klevu set up, is to perform an audit on the current installation.

This is important as every E-commerce instance is different with unique search configuration and customization. It is therefore essential to take stock of how the current system is set up. This should have a particular focus on the current site search settings and the implications of switching it.

If done correctly this ensures that site search is not only significantly enhanced but also brings across any useful customisations that have been done on to improve the legacy search functionality.

As a merchant you have the best knowledge of your existing system, search and customer behaviour so there is huge value in taking the time to consider the following.

Day 1 - Integration Check and Search Audit

Audit the current search

Whether you are using the default Shopify search or a 3rd party tool it is important to spend a little time understanding if any aspects of the search should be preserved and carried across to Klevu. This may include configurations such as synonyms and spelling corrections that are useful to end users.

It may also include data on what people search for on a regular basis and don't get results for. Klevu will gather this information anyway and machine learn in order to provide the most relevant results but understanding this can provide some useful configuration to start with when migrating to Klevu.

Action: Examine the current search configuration and identify any aspects that you would like to retain within Klevu.

Examine 3rd party apps

The Klevu search platform integrates seamlessly into Shopify and Shopify Plus. However, inevitably most E-commerce stores are customised and extended through the use of custom code.

Generally this is what causes issues when implementing Klevu. If the related code has been implemented properly then you are much less likely to experience issues with compatibility.

Therefore a quick stock take on what apps have been implemented, especially relating to search is a valuable exercise.

Action: Identify 3rd party apps that relate directly to search, quick search and product filters. Document the name of the apps and developer for future reference.

Day 2 - Data Synchronization Setup

Difficulty: Intermediate

Time required: 30 mins

Day 2 - Data Synchronization Setup

Setting up a sync between Shopify and Klevu

The first step is to install the free Klevu Smart Search Shopify app. It can be found here.

Day 2 - Data Synchronization Setup

Enable Klevu by selecting a plan in Shopify

Once the official Klevu app has been installed you can begin setting up your site search integration by selecting a Klevu plan in the newly installed app.

Congratulations!

You have successfully signed up with Klevu Search

While search will be active immediately, it may take a few minutes to fully sync all the products, depending on the size of the catalog. Click on "Continue" and take control of search on your store.

If you need any help, feel free to write to us at support@klevu.com

Continue

Verify Klevu Merchant Center (KMC) access

You can now begin setting up your site search integration via the KMC in your Shopify admin panel:
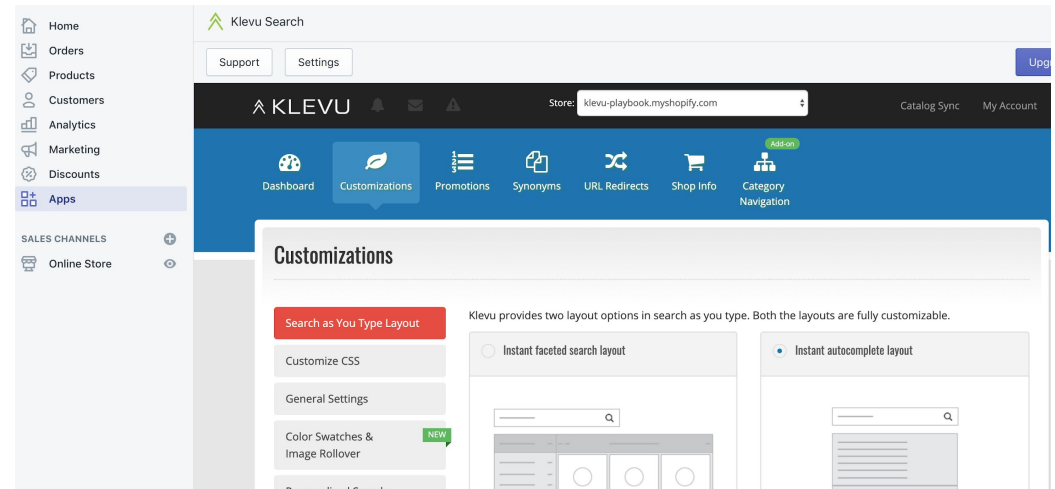
Note, you will need to wait a few minutes for your store data to be fully synced with Klevu and for results to begin

More information on app installation can be found here

Day 2 - Data Synchronization Setup

Catalog sync schedule

The rate at which Klevu and Shopify will synchronize is based on the Klevu plan selected in the previous step. However, Klevu also offers Shopify merchants the ability to perform an on demand sync as needed.

This can be actioned within: >Apps >Klevu Search >Catalog Sync
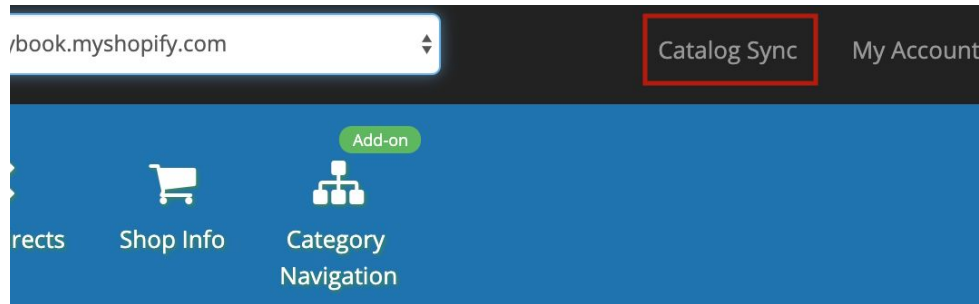
This interface provides various options including information on the current sync status.

From here merchants can perform a manual sync as mentioned:
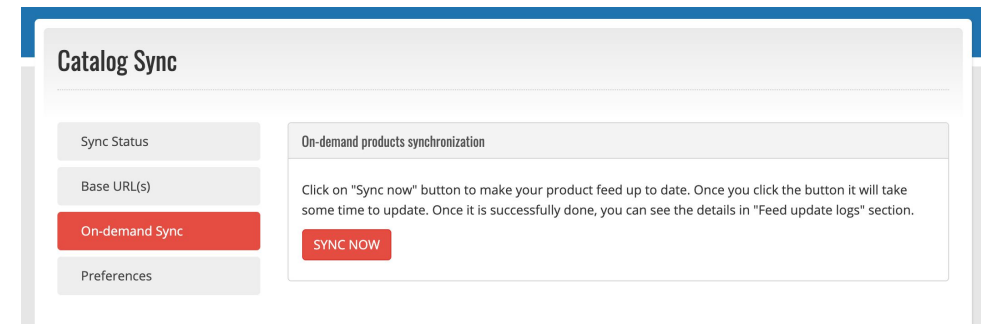
Day 3 - User Setup & Klevu Merchant Center Access

Difficulty: Easy

Time required: 15 mins

Day 3 - User Setup & Klevu Merchant Center Access

KMC - Managing users

The Klevu Merchant Center (KMC) is the control panel for managing data and configuration stored by Klevu.

It is a powerful interface that provides merchants with all the tools needed to customise and modify the user interface, feeds and more. For Shopify merchants this can be found within the Shopify admin under >apps >Klevu.

As with most control panels, Klevu provides granularity on user access based on each users requirements.

It is recommended that a user is created for each individual using the tool along with the appropriate permissions.

Adding a new user

1. Access your KMC via the Shopify admin panel
2. Click on My Account at the top right corner of the screen
3. Select Settings from My Account menu
4. Click on the User Management tab
5. Click on Add New User
6. Fill up the required information
7. Click on Add User

Please note, the owner of the Klevu Merchant Center can only add users under the registered Klevu account.

Day 4 - KMC Customizations part 1

Difficulty: Intermediate

Time required: 1-4 Hours

Day 4 - KMC Customizations part 1

We understand the importance of continuity in look and feel of your site when adding new components. With that in mind we have ensured that the "search as you type" overlay is flexible and highly customisable.

We provide merchants and developers with the ability to work with two predefined layouts as well as allowing more advanced users to write custom CSS to make sure that the search suggestions are displayed in a way that matches the overall site branding:

Klevu provides two layout options in search as you type.

1. Instant autocomplete layout (Default)

Examples - Morris4X4Center & Glitzy Secrets

2. Instant faceted search layout

Examples - Gilchrist & Soames & SMKW

To change the layout, login into the Klevu Merchant Center with the registered email id and password.

Custom CSS

In order to add your own custom CSS to the overlay, please follow the following steps:

1. Login into Klevu Merchant Centre (https://box.klevu.com) with the registered email id and password
2. Choose the appropriate store from the drop down at the top
3. Go to Customizations → Customize CSS

Here, it shows the current CSS used on your site to render search results.

1. Save temporary for preview: Changes will be saved temporarily. You can see the preview by clicking on the Preview button
2. Save & publish: By clicking on the button, changes will be published to live site
3. Make this copy default: You can save the current copy of CSS as default.
4. Reset to default: If you are not happy with your changes then you can revert back to default copy.

Day 5 / 6 - KMC Customizations part 2

Difficulty: Intermediate

Time required: 2-6 Hours

Day 5 / 6 - KMC Customizations part 2

Part of Klevu's strength is the flexibility it offers to include various features via some simple configuration within the KMC. It provides ways to layer manual customisation and enrichment over the top of the powerful machine learning algorithms that happen behind the scenes. The following configurations are available:

Out of Stock products

This part of the configuration allows you the merchant to customize the messaging used on the site when a user searches for an out of stock product.

By default Klevu does not show a caption with out of stock products.

Enter the text here if you want to show the caption with out of stock products:

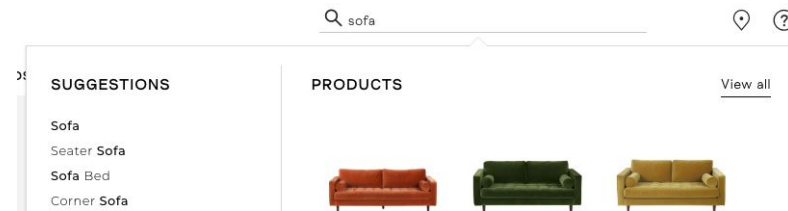## Popular Searches and Recent Searches

Klevu automatically generates a top 5 popular search keywords by default. You can also manually add up to 5 keywords of your own to show the end user as "popular searches" on the frontend of the site.

Include Keywords: Use this if you want to show specific keywords in popular searches, add the keywords here. Please note, you can add maximum 5 keywords.

Exclude keywords: Use this if you want to exclude specific keywords from popular searches generated by Klevu, add the keywords in this section.

Day 5 / 6 - KMC Customizations
Premium and Premium Plus only

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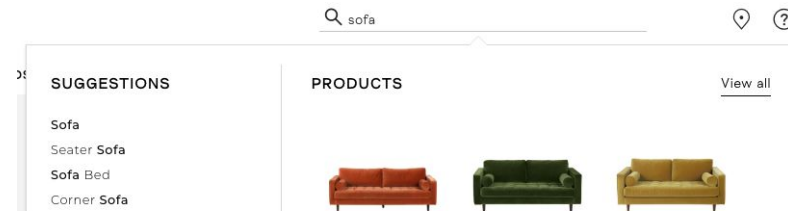### Popular Searches and Recent Searches

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Day 5 / 6 - KMC Customizations part 2

Responsive (Mobile Friendly) Search Results

Responsive design is a best practices and recognised standard nowadays. This is simply due to the ever growing number of mobile and desktop devices all with varying screen resolutions.

Therefore any features on your site should ideally support responsivity. Klevu search recognises this and has architected it's search templates with responsivity in mind.

Some sites still don't support responsivity for a variety of reasons so we have made this an option within the KMC.

Simply click to enable responsive search layout.

Display Product Code (SKU)

Merchant requirements on how products display can vary a lot.

We have made displaying the product SKU within the search results an optional configuration.

This configuration will toggle the displaying of SKU on and off.

Day 5 / 6 - KMC Customizations part 2

Default thumbnail for missing images

Sometimes a product on your store will be missing the appropriate product image. This can happen for a number of reasons such as failure to connect to the CDN, failure in the search syncing process or simply just a lack of assigning the image to a product.

Klevu will display the below image by default however it also provides the option to provide your own custom image to display in this event.


Personalized Search Recommendations - *Premium Plus only*

Personalized search recommendations brings intuitive shopping experience to shoppers. We bring instant results upon a click in the search box that finishes shoppers' thoughts. This part of the configuration has the potential to significantly boost your conversion rates by showing the end user the most regularly searched products as well as recent products being searched in the site.

It reduces friction for more common searches and gets the product in front of the user, quicker.

Klevu provides two simple configurations for this: Show trending products and show recently viewed products (based on the users search history)
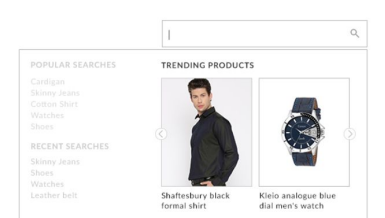
If you require further detail then please see <u>here</u> are instructions that explain how to set this up in more detail.

Day 5 / 6 - KMC Customizations part 2

Facet Control Center

Facets offer a further enhancement to the site search, providing the user with a function to filter their search results based on product attributes. This works in the same way as most site filters on the majority of e-commerce platforms work, by showing all attributes associated with the search based on attributes set to "Visible in search results"

Klevu provides great flexibility by giving the merchant options to use either a multi or single select UI as well as providing an easy interface to reorder the position of the options manually.

Day 5 / 6 - KMC Customizations part 2

CMS search

Further to the indexing of your site catalog Klevu provides the ability to index CMS page content from your e-commerce site and display these within search results. By using this feature you can get the benefit of Klevu's natural language processing (NLP) to provide the end user with relevant and helpful search results.

Customizing Pricing Format

Price formatting is a requirement that varies a lot between merchants therefore Klevu provides an easy way to customise how prices are displayed on the front of your site within the KMC.

It provides options to toggle the display of prices on and off, how to display the price in the facet (price slider vs checkboxes) and also a variety of other configurations including currency symbol, decimal place configurations and more:

Price Format

Digits after decimal	Currency symbol
2 (e.g. $199.50)	USD

Decimal separator	Currency symbol position
Period (e.g. $199.50)	Before price (e.g. $199)

Thousand separator	
No separator (e.g. $1000)	

More information this can be found here:
https://support.klevu.com/knowledgebase/customizing-price-format/

Day 5 / 6 - KMC Customizations part 2

Customizing Add-to-cart functionality

This needs some Shopify specific content

Customizing Pricing Format

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Period (e.g. $199.50)	Before price (e.g. $199)

Thousand separator

No separator (e.g. $1000)

More information this can be found here:
https://support.klevu.com/knowledgebase/customizing-price-format/

Day 5 / 6 - KMC Customizations part 2

Show search report in email

Klevu provides an optional report on search data via email. This can be enabled / disabled from within the KMC as well as providing the option to adjust the frequency as either daily of weekly:

More information on this can be found here:
https://support.klevu.com/knowledgebase/search-report-in-email/

Customizing No Results Found Page(s)

Occasionally an end user will end up searching for something that returns no search results. Most systems simply display "No results found". Klevu recognise this as a missed opportunity to direct the user to useful and relevant content. Therefore we provide configurations to customise the messaging as well as provide dynamic messaging based on the keywords used in the search.

It also provides the ability to upload banners to enrich the no results page:

More information this can be found here:
https://support.klevu.com/knowledgebase/customizing-no-results-found/

Day 7 - KMC Promotions Part 1

> All plans

Day 7 - KMC Promotions Part 1

> Premium and Premium Plus only

Difficulty: Easy

Time required: 1 hour

Understanding of Klevu's Ranking

How is relevancy calculated?

Each of the product fields that are indexed carries a certain weight from a ranking perspective. For example, in our algorithm, the name field is given the top priority and carries more weight, followed by the other fields such as categories and the long description. There are default weights assigned, however, over time, our search algorithm learns and adapts these weights based on user behaviour.

Depending on where the keyword appears in the product fields, Klevu calculates an overall relevancy score for each product.

What are the different boosting scores and what is their impact on the relevancy score?

As the name suggests, boosting scores are used for boosting relevancy scores – they are multiplicative parameters. In other words, whatever the relevancy score of a product, it is multiplied with the relevancy score to obtain a new, final, relevancy score. This is the score that is used within our result ordering algorithm. There are different ways a product can be boosted. Admin users can use the bulk product promotions functionality from KMC to boost multiple products by creating rules. In this case, if there are multiple rules applying to the same product, the one with the highest boosting score is used. The other method for boosting products comes from either passing a boosting score in the feed or by using the individual product promotions feature in KMC to assign a score to each product. In this case, the score assigned overrides any score assigned to the respective product by any bulk boosting rule.

At this stage, the relevancy score is multiplied with the respective boosting score and the final score is calculated.

Understanding of Klevu's Ranking (continued)

How does Klevu handle exact matches, word inflections, synonyms, compound words and fuzzy matches?

By default, Klevu gives the highest priority to the exact match. As part of the indexing process, we normalize words to obtain their base forms (e.g. laptops -> laptop) and where applicable, we decompound the compound words (e.g. wineglass -> wine glass). Information on how synonyms are incorporated is available here: "How does the synonyms feature work in Klevu?".

If Klevu cannot find an exact match, it turns the phrase into a fuzzy query and attempts to match words that are similar to the one inputted by the user.

How does self-learning affect search results?

What has been described above is the out-of-the-box behavior of our search algorithm. However as Klevu is built on a self-learning algorithm, we monitor several parameters of the search activity and automatically apply several parameters specific to individual stores. For example, we identify what matters most to individual shoppers in real-time and apply the personalization to their set of results.

We maintain an internal score that acts as a tiebreaker in the case that the final relevancy scores for two separate products are the same. Klevu also learns which categories to boost over the others for individual queries. The list of search parameters is long and beyond the scope of this article, however, the major contributors to our core algorithms, that can be managed and configured by admin users have been explained above.
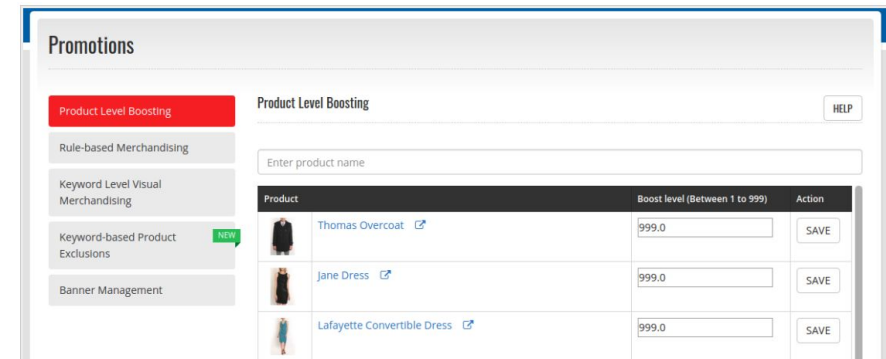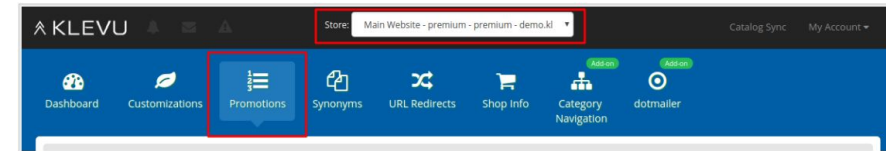
KMC Promotions | All plans

Product Level Boosting

Klevu provides the ability to manually boost individual product visibility from within the KMC. This is particularly useful when you want to promote products and assign importance to them on a granular basis.

When a set of products are returned in a response to a customer query, the ones with higher manual boosting are ranked higher vs. those with no manual boosting or lower manual boosting.

Follow the steps below to boost individual products:

1. Login into Klevu Merchant Center (https://box.klevu.com) with the registered email id and password

2. Choose the appropriate store from the drop down and Click on the Promotions tab:

KMC Promotions Part 1 | All plans

By default, it shows the list of boosted products. Search for the product that you want to boost.

Assign a boosting score: You can assign a boosting score (a decimal value) between 1 and 999 where 1 is the lowest boosting score and 999 is the highest one. By default, every product has a boosting score of 1.0. To deboost a product, use the boosting score between 0.1 and 0.9.

> Click on the Save button
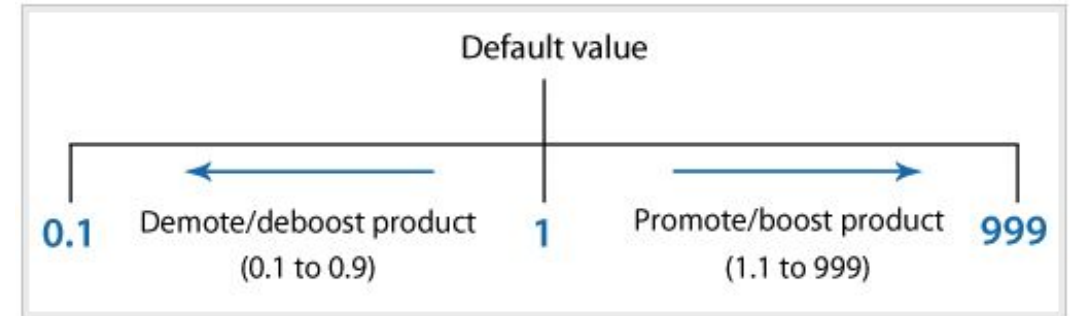
If you are on our Growth plan, please click here to proceed to the next section >

Day 7 - KMC Promotions Part 1
Premium and Premium Plus only

Rule-based merchandising (Collections & Attributes boosting)

With the Rule-based Merchandising UI, you can manage product promotions based on your business logic. Here, you can create promotion rules to prioritize products under specific categories and/or with specific attribute values.
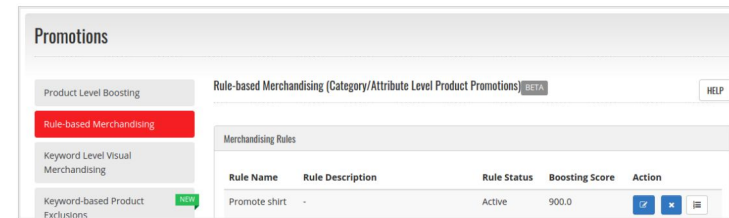
How to promote products in bulk?

Login into Klevu Merchant Center (https://box.klevu.com) with your registered email id and password.

> Choose the appropriate store from the drop down and click on the Promotions tab.
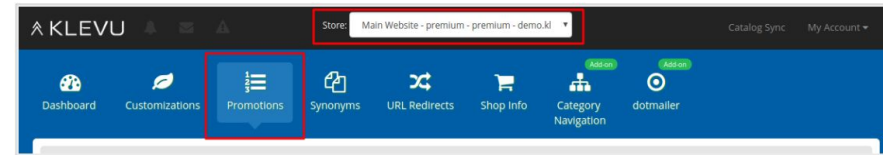
> Click on the Rule-based Merchandising tab.

Day 7 - KMC Promotions Part 1
Premium and Premium Plus only

> Click on the Add New Rule button to start adding a product promotion rule.

> Rule Information:
Give a friendly name to your rule and add some description. Select the status as Active.

> Rule Condition: Here, you can create various "conditions" to promote products in search. Click on the plus button to select the appropriate category or attribute name. Choose the appropriate operator and a value for the selected category and/or attribute.
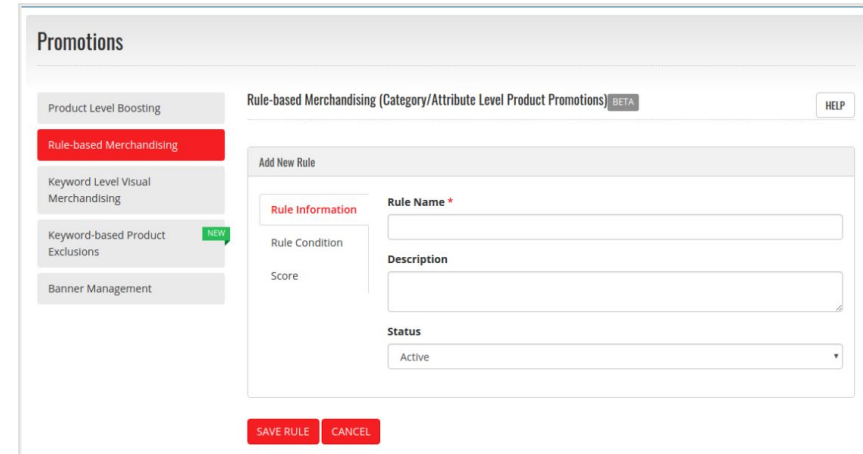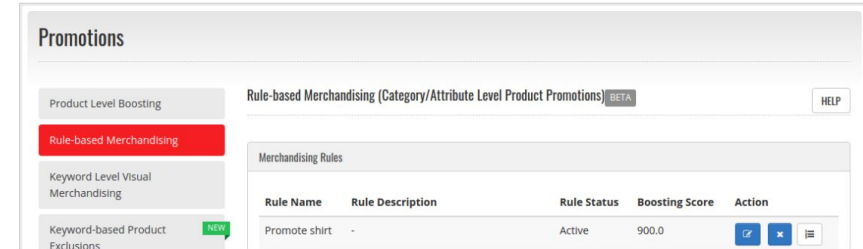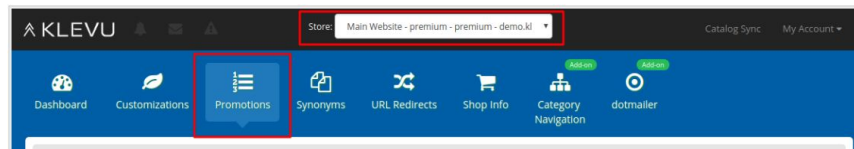
Day 7 - KMC Promotions Part 1
Premium and Premium Plus only

> Boosting Score: When a product satisfies all the "conditions", the boosting score specified here will be assigned to this product. Please, make a note of the following points:

> By default, every product has a boosting score of 1.0.

> You can assign a boosting score (a decimal value) between 1 and 999 where 1 is the lowest boosting score and 999 is the highest one.

> To deboost a product, use the boosting score between 0.1 and 0.9.

> Click on the Save Rule button to save the rule. Once the rule is saved, please allow up to 20 minutes for the changes (i.e. product promotions) to be visible in the search results.

Day 8 - Promotions Part 2
Premium and Premium Plus only

Difficulty: Intermediate

Time required: 2 Hours

Day 8 - Promotions Part 2
Premium and Premium Plus only

Keyword-level Visual Merchandising

Keyword-level merchandising allows you to promote certain products based on the keyword used. This is a powerful feature as it allows an extra layer of enrichment on top of the Klevu machine learning and NLP algorithms.

How to promote products always on top in search results?

Login into Klevu Merchant Center (https://box.klevu.com) with your registered email id and password.

> Choose the appropriate store from the drop down and click on the Promotions tab.

> Click on the Add New button.

> Keywords: Here, enter the comma separated keywords (search terms) for which you want to show products always on top in the search results.

> Set top products: Here, search for the product → Drag and drop the product to the 'Top Products' box.

> Click on the Save and Boost button. Please allow up to 20 minutes for the changes to be visible in the search results.

> Excluding products from search results on specific search keyword(s) - https://support.klevu.com/knowledgebase/excluding-products-from-the-search-results-on-specific-search-keywords/
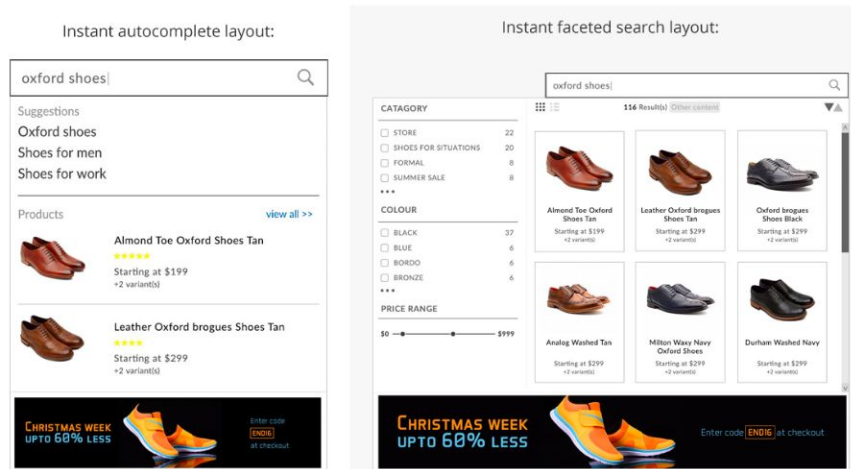
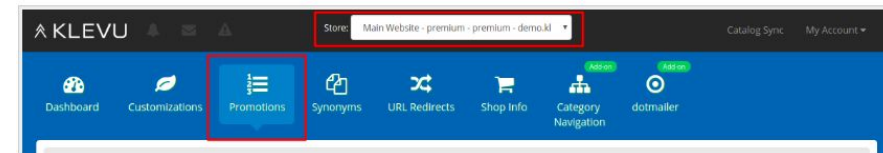# Day 8 - Promotions Part 2
Premium and Premium Plus only

Banner Management

Banner Ad is used for promotions in quick search (search-as-you-type) and on search results page. With this feature, you can associate banners with specific keywords and show them when these keywords are searched.

Follow the steps below to setup a banner ad:

> Login into Klevu Merchant Center (https://box.klevu.com) with your registered email id and password

> Choose the appropriate store from the drop down and click on the Promotions tab.

> Click on the Banner Management tab.

Day 8 - Promotions Part 2
Premium and Premium Plus only

Banner Management continued..

> Image URL: Develop a banner image with the recommended size; upload it to your server and provide the public URL of the banner image.

- - Recommended size:
- - Width: [Container of the search results page]
- - Height: 265px

> Banner Name: Provide a friendly name to the banner (i.e Christmas sale). Check "Enable Banner" box.

> Target URL: Provide URL of the page where customers should be taken when they click on the banner.

> Ad Duration: Select "From" and "To" dates for the duration when the banner should be displayed. The "To" date parameter is optional. If the "To" date parameter is not selected, the banner will be displayed all the time.

> Show this banner on: select at least one of the options,

a. Quick search: Banner will be displayed on the quick search UI. Select the position of the banner in the quick search.
  i. Top: Banner will be displayed at the top of quick search UI.
  ii. Bottom: Banner will be displayed at the bottom of quick search UI.

Day 8 - Promotions Part 2
Premium and Premium Plus only

Banner Management continued..

- Search results page: Banner will be displayed on the search results page
- Show this banner for: select one of the options,
    - Any search term: Banner will be displayed as default for any search term.
    - Specific search terms: Here, you can associate search terms with the banner. It will be displayed only for the given search terms. For more than one search term, use comma (,) as a separator.
- Click on the Save and Publish button.
- More detail on Banner Management configurations:
  https://support.klevu.com/knowledgebase/showing-promotional-banners-in-search/

Day 9 - KMC Synonyms

Difficulty: Intermediate

Time required: 4 Hours

Day 9 - KMC Synonyms

Synonyms within most e-commerce platforms are treated differently than how they are used in Klevu.

Typically, when someone says "beautiful" is a synonym for the word "gorgeous", it literally means, if someone types in "gorgeous", use the term "beautiful" to search; do not use the term "gorgeous" at all. It is also important to note that synonyms normally only work when the entire query matches the words used for synonyms. Here, if someone says "gorgeous purse", your site will NOT replace the term "gorgeous" with the term "beautiful".

Klevu on the other hand treats synonyms differently. If a customer types in "gorgeous", Klevu will search for both the terms (i.e. "gorgeous" and "beautiful"). At the same time, it doesn't have to be the exact query for the synonyms to work. In other words, if a customer searches for "gorgeous purse", it will fire the following query (gorgeous OR beautiful) AND purse

In case of the quick search UI, the query is directly submitted to the Klevu servers. The same is true for the landing page based on the Klevu template.

In both the cases, synonyms provided in the Klevu Merchant center will be utilized to find the products.

These synonyms, where applicable, are automatically added to the query at runtime and searched along with the original terms searched by the shoppers.

Login into Klevu Merchant Center (https://box.klevu.com) with the registered email id and password
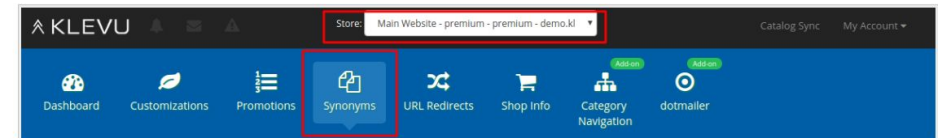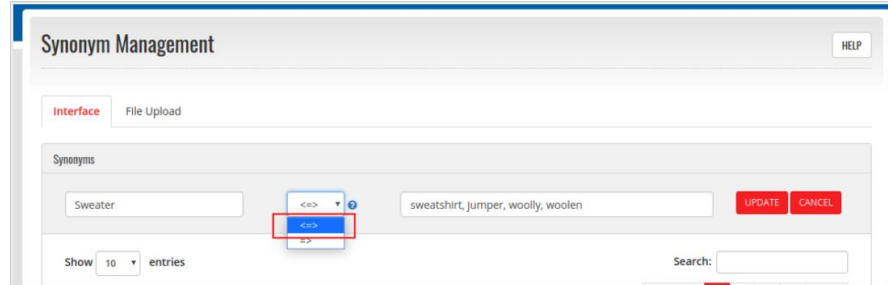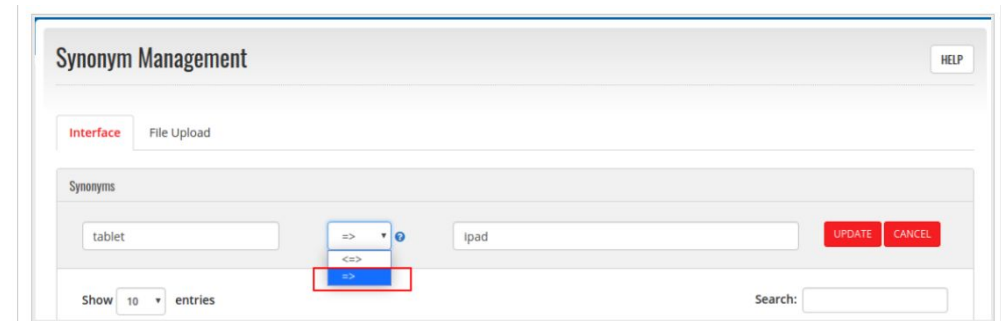
Day 9 - KMC Synonyms

From Interface File Upload

Adding bi-directional synonyms: For example,
Search term: Sweater
Direction: <=> (bi-directional)
Synonym: sweatshirt, jumper, woolly, woolen

Synonym Management

HELP

Interface File Upload

Synonyms

| Sweater | <=> ▼ ❓ | sweatshirt, jumper, woolly, woolen | UPDATE CANCEL |

Show 10 ▼ entries   Search:

Here, all the words (Sweater, sweatshirt, jumper, woolly, woolen) are treated as synonyms of one other. In other words, when a shopper searches for one of these words, all the other synonyms of the same are searched as well. **Adding uni-directional synonyms:** For example,
Search term: tablet
Direction: => (uni-directional)
Synonym: ipad

Synonym Management

HELP

Interface File Upload

Synonyms

| tablet | => ▼ ❓ | ipad | UPDATE CANCEL |

Show 10 ▼ entries   Search:

Here, when a shopper searches for the term "**tablet**", the words "**ipad**" too are searched. However, the vice-versa is not true.

Day 10 - URL Redirects

Difficulty: Intermediate

Time required: 4 Hours

Day 10 - URL Redirects

The URL Redirect feature is useful if you want to redirect your shoppers to specific pages on specific keywords.

Klevu offers two types of layouts for the landing page.

1. Based on the Klevu Template
2. The one that preserves your native theme layout

Depending on which layout you have chosen our javascript decides where to take your shoppers to when they press the enter key in the search box. But before the shopper is redirected to the search results landing page, our JS will check if there is any URL redirect set in the Klevu Merchant Center (KMC). If there is any URL redirect found for the entered keyword (exact match), the shopper will be taken to that page.

Follow the steps below to manage URL Redirect

1. Login into Klevu Merchant Center (https://box.klevu.com) with the registered email id and password

2. Choose the appropriate store from the dropdown

3. Click on the URL Redirects Tab

Day 10 - URL Redirects

4. In the Search Terms field, enter comma-separated keywords

5. Enter a page URL in the Redirect To field

6. Click on the Add button

7. Once you have set up all the redirects, click on the Publish URL Redirects button

# Day 11 - Overall Search Statistics

Difficulty: Easy

Time required: 1 Hour

Day 11 - Overall Search Statistics

Klevu dashboard produces the detail search insights of your site. It helps to create razor sharp SEO and promotional campaigns. Concrete data helps increase conversion rates. Depending on your plan, one can see the search insights up to last 120 days.

Within search insights, you can view summarized and detailed report of searched queries, keywords, product clicks, locations and Klevu led sales conversion.
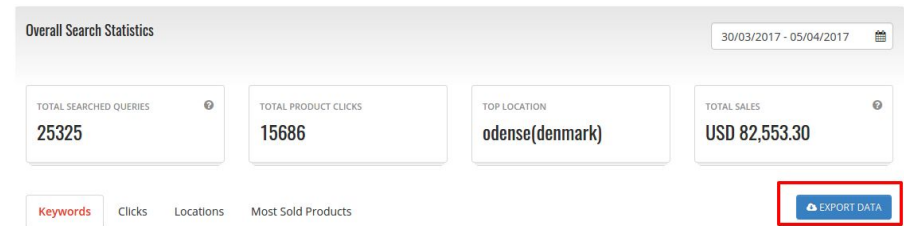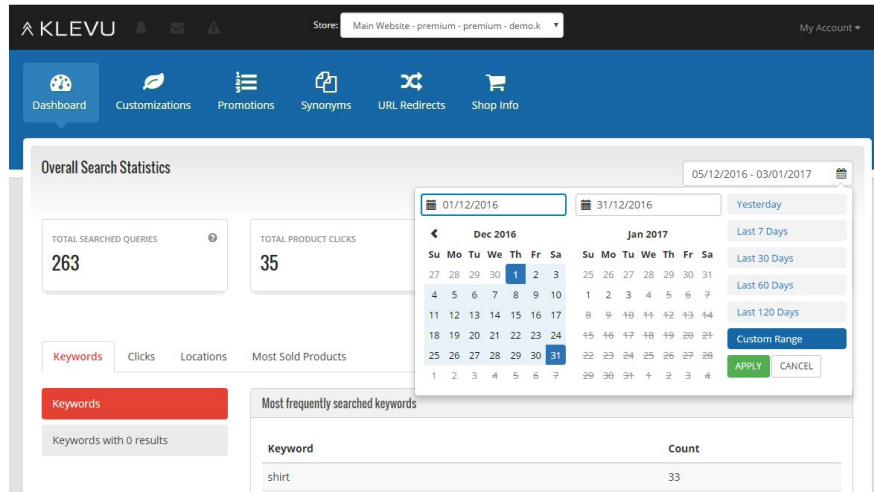
How to export search statistics data?

Day 12 - Integrating Google Analytics with Klevu

Difficulty: Intermediate

Time required: 2 Hours

Day 12 - Integrating Google Analytics with Klevu

If you are using Google Tag Manager, please also follow the steps in the guide below to integrate Klevu with your GTM account.

GTM Integration Guide

By default, Google analytics tracks the search queries which are redirected to search landing page (search results page).

If you want to track the "Search-as-you-type" queries (AJAX search) in google analytics, here are the steps:

1. Login to your Google Analytics account at http://www.google.com/analytics
2. Click on Admin
3. Click on View Settings
4. Under the Site Search Settings, turn on Site search Tracking (if it is not already on).
5. Input klevusearchterm as the additional Query Parameter
6. Check the box Strip query parameters out of URL
7. Click on the Save button
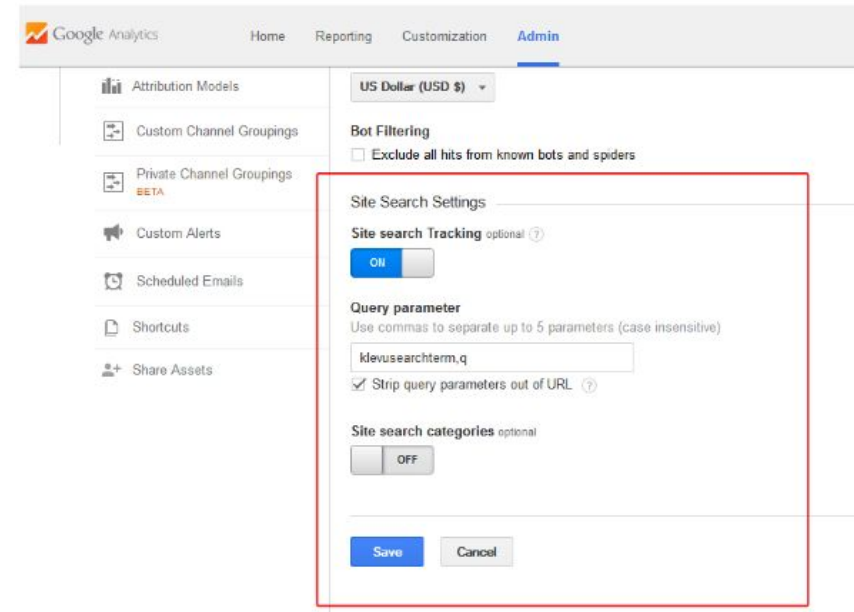
Day 13 - Optional Extras

Difficulty: Intermediate

Time required: 2-4 Hours

Day 13 - Optional Extras: Exclude Collections
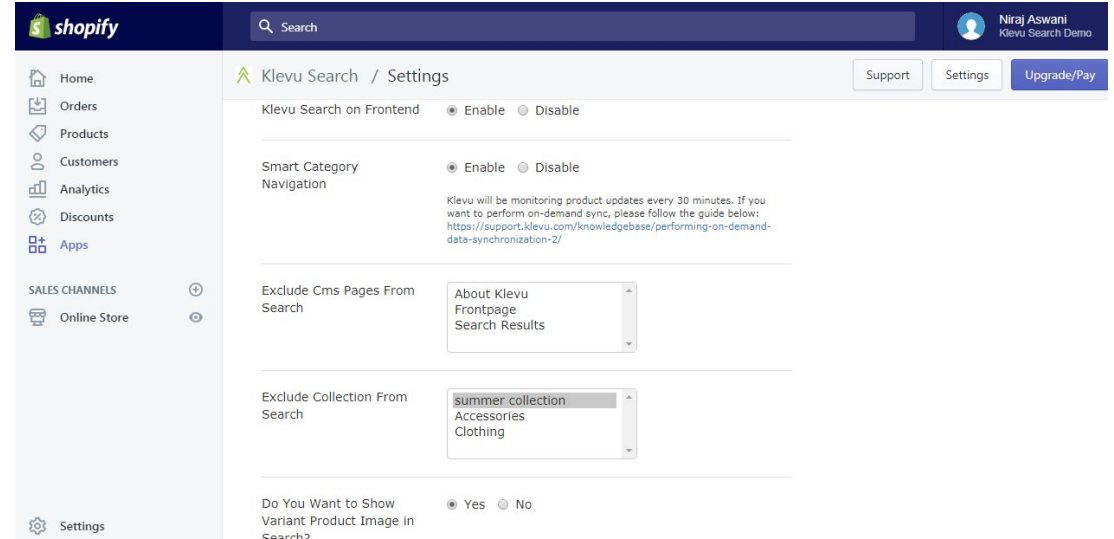
By default, Klevu indexes all the collection pages to display in the search results. To exclude specific collection pages from the search results, please follow the steps given below:

> *Login into Shopify Admin Panel*

> *Go to Apps → Klevu Search → Settings*

> *Select the collection pages to exclude for the option Exclude collection pages From Search*

> *Click on Submit*

Day 13 - Optional Extras: Enabling Image Rollover Effect

Image Rollover Effect is used to show a second product image (if available) on the hover of a product thumbnail on the search landing page.

1. Make sure that a second product image is added in your product catalog

2. Go to Apps → Klevu Search

3. Go to Customizations → Color Swatches & Image Rollover

4. Check the "Enable Image Rollover Effect" box

5. Click on the Save button

6. All done! Image rollover effect will be visible on the store frontend in next few mins.

Day 13 - Optional Extras: Enabling Color Swatches

By default, Klevu uses the Color as the Option Name in Variants. If you are using a different option name (e.g. shoe_color), please go to the Apps → Klevu Search → Settings page and provide the same option name in the Swatch Option Name field.color-swatches-option-name.

By default, Klevu identifies color variant values (i.e Red, Blue, Green etc…) and uses the CSS colors to displays the respective color swatch for each color identified. In case of a multi-colored product or to display a custom image for a swatch, please follow the Step 3 and Step 4 below.

The color images for swatches should be present in the Online Store/Themes/Assets folder. If a third party app is storing color images in a different location, they will have to be copied into the Online Store/Themes/Assets folder swatch-asset-folder.

We expect you to follow the Shopify's color image naming convention. For pink color, the file should be named as pink.jpg, for dark blue, the file should be named as dark-blue.jpg.

Perform the On-demand synchronization. Go to Apps → Klevu Search → Catalog Sync → On-demand Sync → Sync Now

Enable the feature from Klevu Merchant Center

Go to Apps → Klevu Search

Go to Customizations→ Color Swatches & Image Rollover

Check the "Enable Color Swatches" box color-swatches-kmc

Click on the Save button

Color Swatches should be visible on store frontend.

Day 13 - Optional Extras: Multi-Currency Support

Shopify is adding the ability for Shopify Plus merchants to sell in multiple currencies. To enable this functionality, merchants have to visit the Shopify Payments settings in their Shopify admin and select the currencies that they want to provide the support for. Once enabled, the shoppers will see product prices in their local currency throughout the online store and the checkout process.

In order to enable the same behavior in the Klevu Search Results and the Klevu powered Smart Category Navigation pages, please follow the steps below:

Prerequisites:

-   A store must be using Shopify Plus plan
-   Merchant must have setup the multiple currencies feature on the store

Steps:

After setting up the multiple currencies, please follow the instructions on the on-demand sync page to sync all the new currencies data to the Klevu servers.

> Login into your Shopify Admin

> Go to Online Store → Custom theme → Edit HTML/CSS

> Go to Edit Layout

> Open theme.liquid file

> Add the following code before the </body> tag:

```
<script>

try{
 var klevu isMulticurrencyEnabled = true;
 if( document.getElementById("CurrencySelector")
){
    var klevu currentCurrencyCode =
document.getElementById("CurrencySelector").value;
 }
} catch (e) {}
    </script>
```

Day 13 - Optional Extras: Smart Category Navigation

On top of the standard search overlay and search results page, Klevu also now provide a feature to harness the power of its machine learning and NLP capabilities on your product landing and category pages.

This feature allows merchants to display products based on the end users preferences and past behaviour. It also allows the merchant to manually override position products on the listing page for optimal results.

By default, the Smart Category Navigation add-on is disabled.

To enable this add-on, go to Klevu Merchant Center → Category Navigation, and request for a quote.

Once activated, follow the following steps within Shopify:

- Go to Shopify Admin Panel → Apps
- Go to Klevu Search app
- Click on Settings
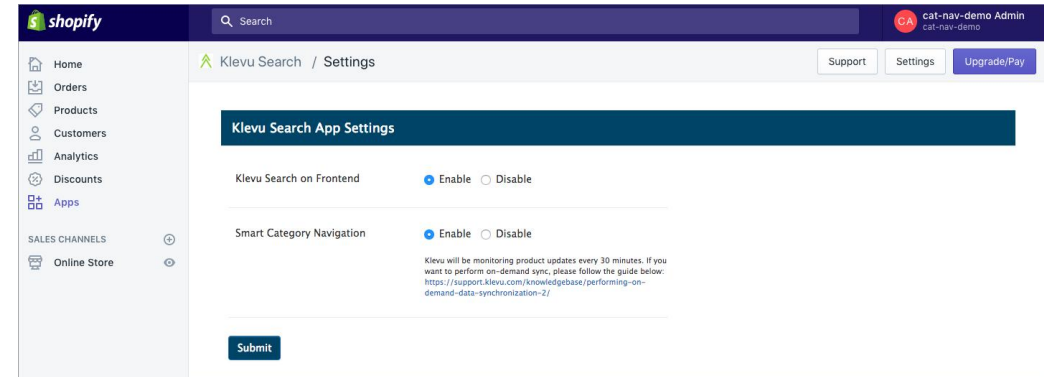
Once it is available, you can enable/disable the add-on from Klevu Search App → Settings page.

Day 13
# Optional Extras: Klevu Connector in Shopify FLOW

The Klevu connector in Shopify FLOW allows the merchant to create automated workflows around the product promotions and top search terms.

Below is an example workflow which you can create using Klevu connector and Shopify/third-party app:

Workflow: Promote/Demote the product in Klevu when product inventory value is changed.

> Go to Shopify Admin Panel → Apps → Shopify FLOW app.

> Click on Create workflow.

> Select the Trigger by Shopify: Inventory quantity changed.

> Add the Condition: Product total inventory and set an inventory quantity value (For example, If Product total inventory is greater than 30).

> Select the Action by Klevu Search: Promote/Demote product in search.
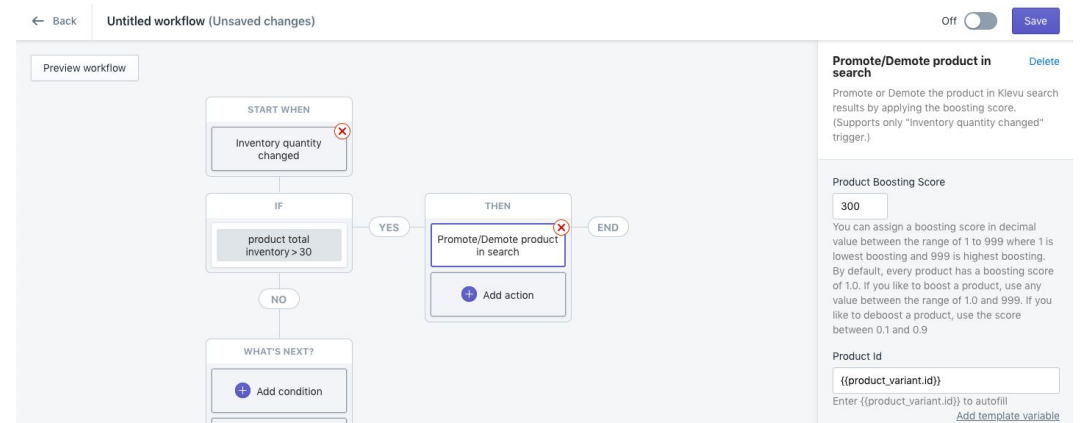
> Turn On the workflow and click on Save button.

Day 14 - Go Live Checklist

Difficulty: Intermediate

Time required: 2 Hours

Day 14 - Go Live Checklist

☐ **Ensure sync is running correctly**

Make sure your catalog is successfully linking to your KMC account by viewing the sync status under >apps >Klevu search >catalog sync >sync status

☐ **Ensure order synchronization is enabled**

Make sure the order synchronization is enabled. We use the checkout data to automatically re rank our search results.

☐ **Set order of facets within the KMC**

You can decide the order of facets from the Klevu Merchant Center (KMC) > Configurations > Facets. This can be done by moving the facets up and down.

Day 14 - Go Live Checklist

☐ **Set other preferences within the KMC**

In KMC, there are several small settings that you should go through at least once. For example,

Setting up image placeholder, VAT caption, Whether you want to show products that are out of stock or not. If yes, if you want to set any out of stock caption. etc..

☐ **Ensure Klevu can promote products over accessories**

If you are selling both the products and accessories, please let us know names of the products categories. It is recommended that the core product categories should have slightly higher weight than their respective accessories by default.

☐ **If you would like to use Model numbers let Klevu know**

If your customers are searching by model numbers, please let us know so that we can enable the special processing of the model numbers.

Day 14 - Go Live Checklist

☐ **Provide Klevu with your historical search data**

If you have any past search data (e.g. searches, clicks and checkouts), please share them with us so that we can inject them to bootstrap learning from the day one.

☐ **Ensure Klevu API keys are unique for each store**

Please make it absolutely sure that you are not using the same API keys between any two store views search configurations (and/or between staging and live sites). Please use of our guide on managing staging to live migration

☐ **Configure search synonyms**

We encourage you to add your domain specific synonyms in the Klevu Merchant Center > Synonyms tab.

You are all set!

Please, write to us if you have any doubts/questions/feature requests. We love to hear your feedback and improve our product with your help :)