Sparsh Technologies

AUTO RELATED PRODUCTS

USER GUIDE

Version 1.0.1

Magento 2 Auto Related Products is an extension that uses sets of conditions and actions as rules to dynamically showcase related, cross-sell, and up-sell items in your store to help customers easily find necessary products on the product, category, shopping cart, and checkout pages.

KEY FEATURES:

- Use the rule-based algorithm to offer auto-related, up-sells and cross-sells products
- Boost store revenue by setting up smart product recommendations
- Uses sets of conditions and actions as rules to define where and what products to display
- Display related items on product, category, shopping cart, checkout pages, and custom positions
- Customize block layout and position within the page
- Keep the related products block at various places on the page
- Display related products to a selected group of customers and websites or store views.
- Up-sell/Cross-sell on the cart page with AJAX
- Manage from and to display dates
- Manage the number of products to be displayed
- Manage the fields of products to be displayed like price, add to cart button, etc.
- Option to choose to do not show products in the block if it is added to the cart or wish list
- Option to choose to also add Related/Cross-Sell/Up-Sell products of selected products in the block
- Define products sort order based on price, new arrival, and best seller criteria
- Choose to display out of stock products or not

1. CREATE AUTO RELATED PRODUCTS RULE

You can create rules to show auto related products on one of the below four types of pages.

1) Product Pages
2) Category Pages
3) Cart Page
4) Checkout Page

Steps to create a rule to show auto related products for any of the above pages are almost the same. We have mentioned separately in this documentation where there is any difference.

Go to Magento 2 Admin > Login > Auto Related Products (Left menu)

Click on the related page type option like Product / Category / Cart / Checkout under the Add Rule" dropdown.

E.g. If you want to display related products on the product detail pages then choose the type as "Product". Similarly, if you want to display related products on the category listing pages or cart page or checkout page then choose the type as "Category" or "Cart" or "Checkout" respectively.

There will be tabs named "Rule Information", "Where to Display", "Display" and "Products To Show".

In the **Rule Information** tab, you will need to fill out general information as below.

- **Status**: Select the rule status. By default, this is enabled. If you want to disable the rule, you can select this field as disabled.
- **Rule Name**: Name of the rule for reference in the backend.
- **Position**: Define the position where related products block will be displayed. If you want to put related products block on a specific page or place, then choose the option “Manually”.

  Position options are based on the page type chosen.

  Below options are common for all page types.
  1) Before Content
  2) After Content
  3) Left Popup
  4) Right Popup
  5) Manually

  Below options are specific to Product pages.
  1) Replace Related Products
  2) Before Related Products
  3) After Related Products
  4) Replace Upsell Products
  5) Before Upsell Products
  6) After Upsell Products

  Below options are specific to Category pages.
  1) Before Sidebar
  2) After Sidebar

  Below options are specific to Cart pages.
  1) Replace Cross-sell Products
  2) Before Cross-sell Products
  3) After Cross-sell Products

- **Store Views**: Choose store views for which this related products block will be displayed.
- **Customer Groups**: Choose customer groups for whom this related products block will be displayed.
- **From Date**: Enter the date from which the related products block will be displayed.
- **To Date**: Enter the date until which the related products block will be displayed.
- **Priority**: Enter the priority of the rule. This is useful in case of having multiple rules applied on the same page.

In the **Where to Display** tab, you will need to define where you want to display given related products block by using rule-based sets of conditions.

E.g. For product pages, you need to define for which product pages, related products block will be displayed.

For category pages, you need to define for which category pages, related products block will be displayed.

For cart pages, you need to define for which product to be added in cart or on what minimum order total or minimum purchased items, related products block will be displayed.

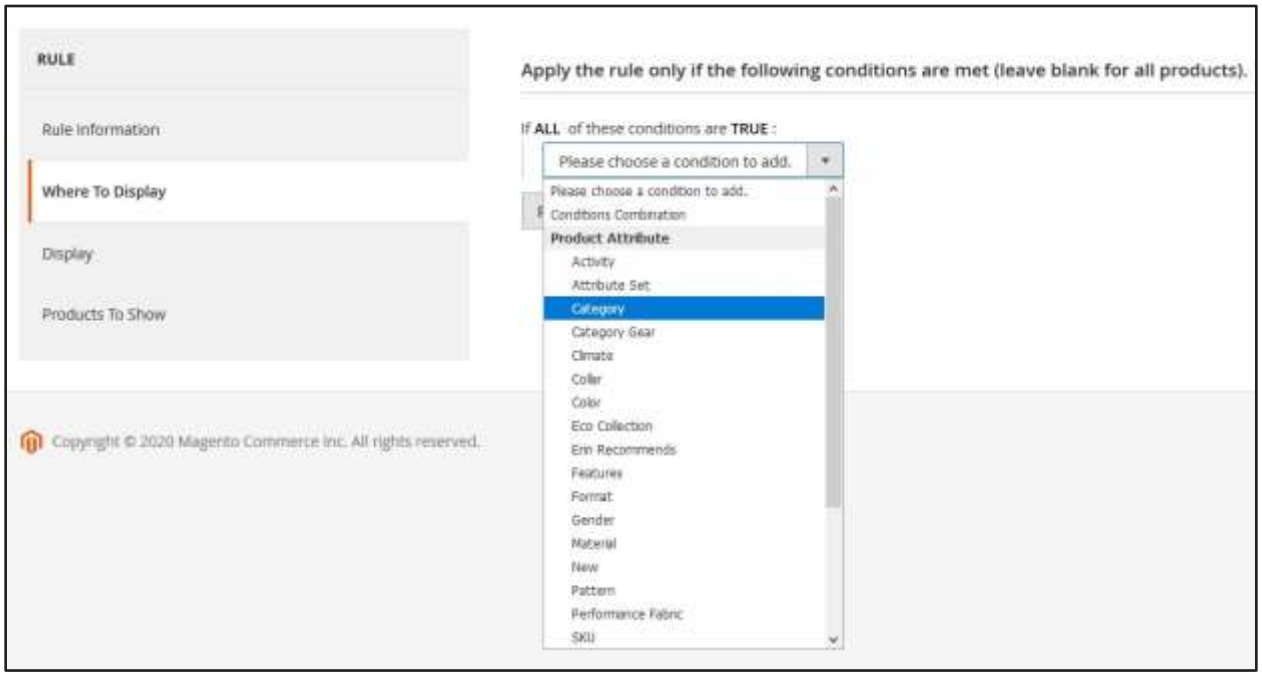
For checkout pages, you need to define for which shipping or payment method or customer country, related products block will be displayed.

Note: You will not get this tab if the position is set as “Manually” and rule type is either “Product” or “Category”.

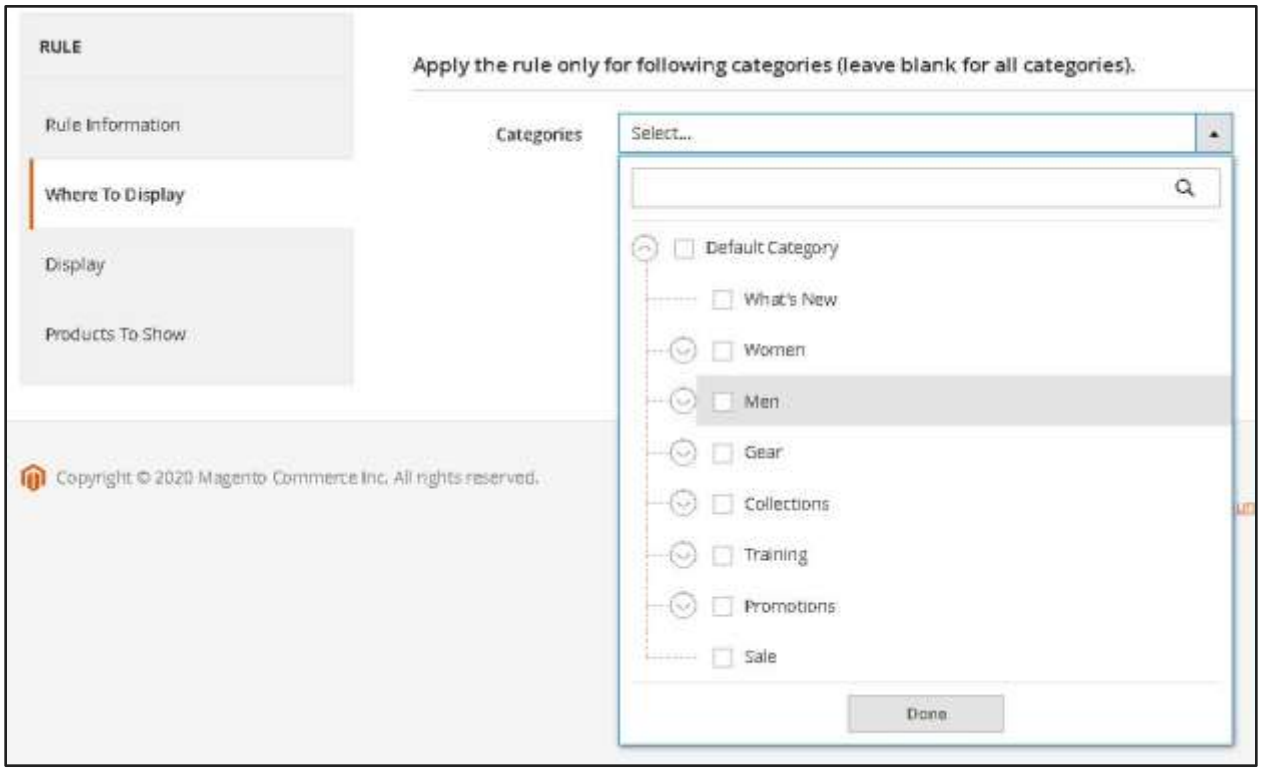
You will get different sets of conditions based on the page type chosen.

You can instantly preview and verify products based on the conditions applied by clicking on the “Preview Products” button.

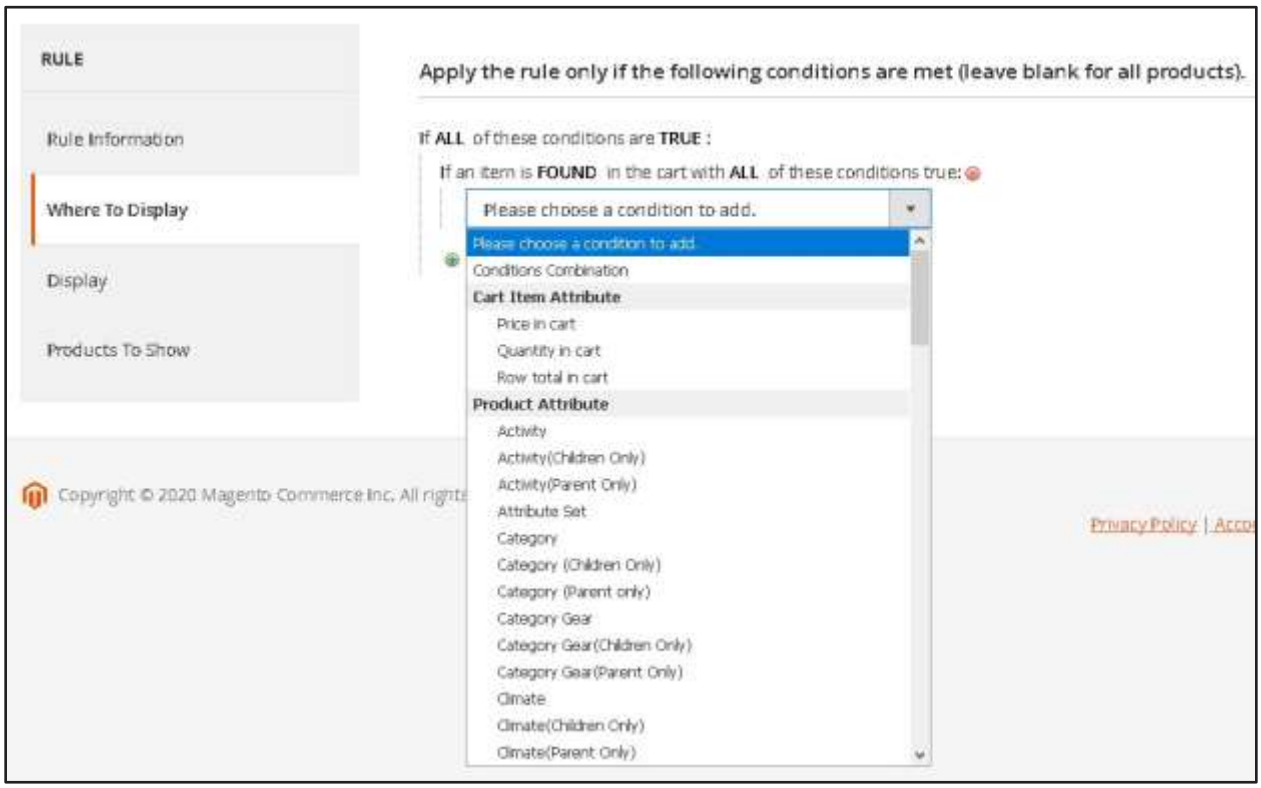
For the product page, you can set conditions based on product attributes.



For the category page, you need to select categories from the tree.



For the cart and checkout pages, you can set conditions based on product and cart attributes.

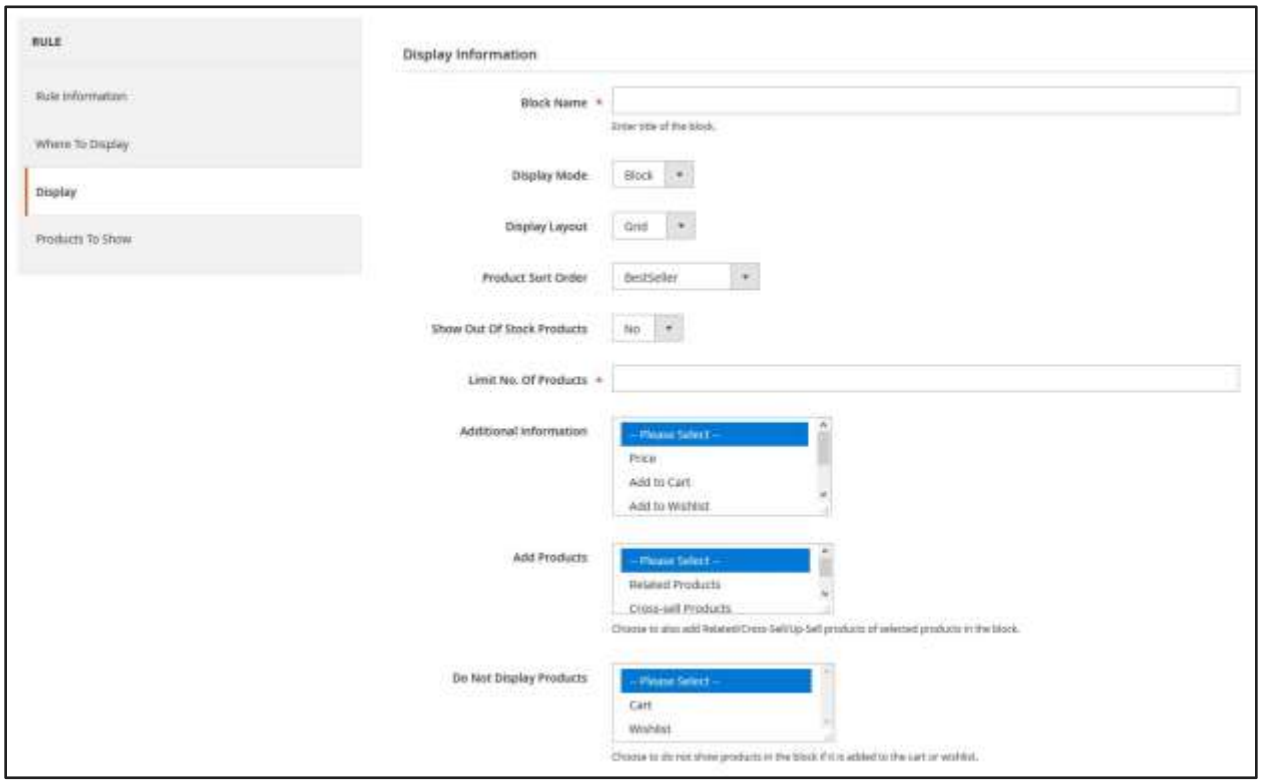


In the **Display** tab, you will need to fill out information related to block which will be displayed on the storefront.

Under **Display Information** Section:

- **Block Name**: Enter the title of the block. This will be shown as a block title on the storefront.
- **Display Mode**: Choose the “Block” option to load block content on page load or “Ajax” option to load block content with Ajax without page load. The Display mode is not available if the position is chosen as “Manually”. And it is set as “Ajax’ automatically if any of the options for the field “**Do Not Display Products”** are set.
- **Display Layout**: Choose the block layout as “Grid” or “Slider”.

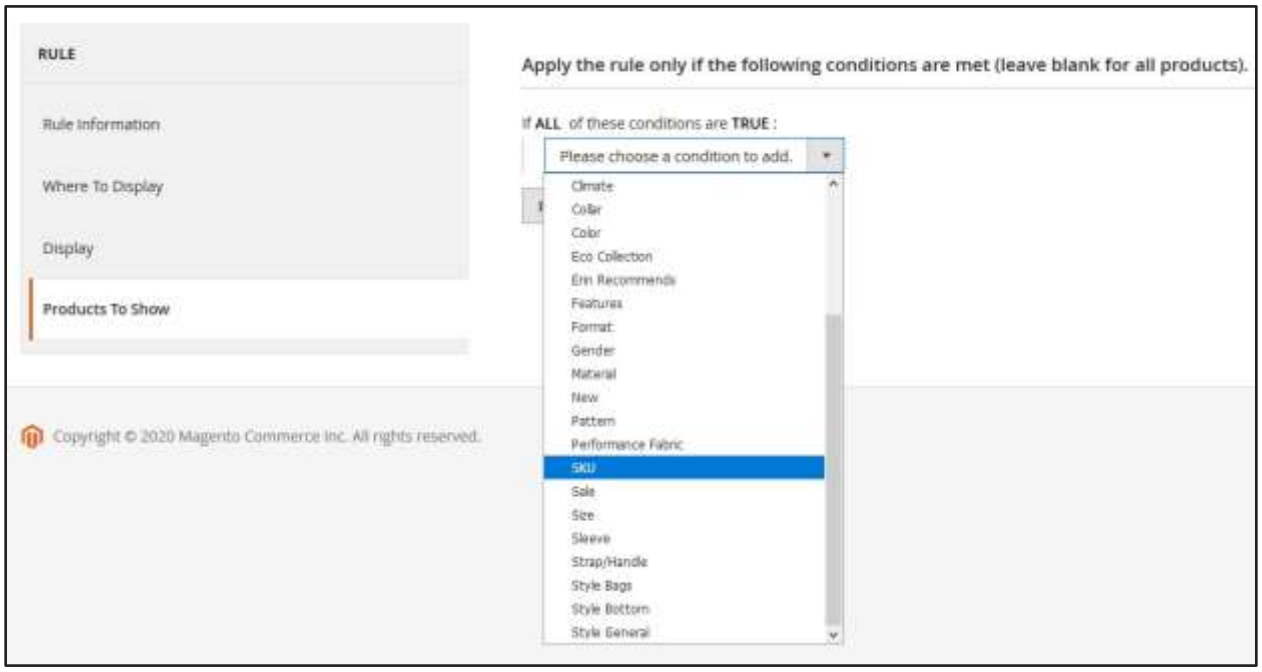
- **Product Sort Order**: Choose the sort order of the products in a block. Available options are: “Best Seller”, “Low To High Price”, “High To Low Price” and “New Arrivals”
- **Show Out Of Stock Products**: Choose “Yes” to include out of stock products in a block.
- **Limit No. Of Products**: Limit no of products to be shown in a block. Only 1 product can be shown in case of position is chosen as “Left Popup” or “Right Popup”.
- **Additional Information:** Select additional fields to be shown for products. E.g. Price, “Add to Cart”, “Add to Wishlist”, “Add to Compare” buttons or Review information.
- **Add Products:** Choose to also add Related/Cross-Sell/Up-Sell products of selected products in the block.
  Note: This section is available only for “Product” type.
- **Do Not Display Products:** Choose to do not show products in the block if it is added to the cart or wishlist. It will set the “**Display Mode”** field to “Ajax”.



Click the “Save and Continue Edit” button. And keep adding additional information.

In the **Products to Show** tab, you will need to define what products you want to include in given related products block by creating rule-based conditions based on product attributes.

You can instantly preview and verify products based on the conditions applied by clicking on the “Preview Products” button.



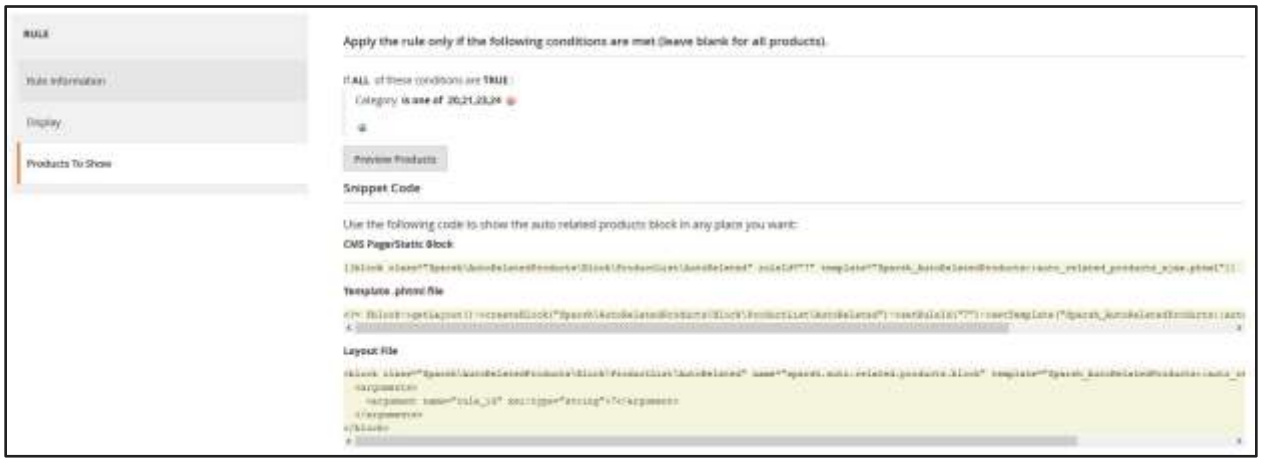
If position is chosen as “Manually”, you will get Snippet code section.

Note: This section is visible only after you saved the rule once while creating a new rule.

Click the “Save and Continue Edit” button once if not done yet.

Under the **Snippet Code** Section:

Here you can find the snipped code for “**CMS Page/Static Block”, “Template .phtml file” and “Layout File”** to show the block in any place you want.



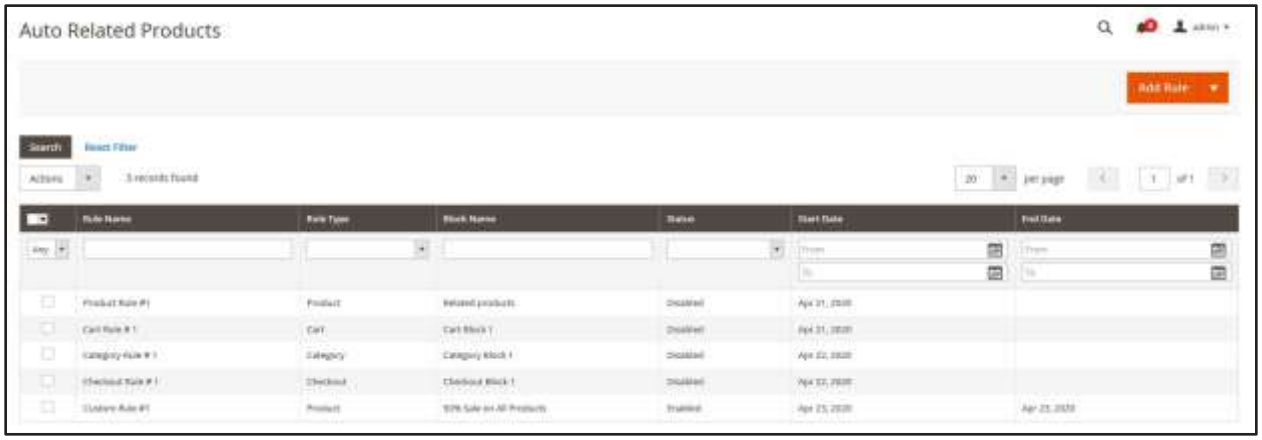
Note: You might need the help of the technical team to put this for you.

After adding information, click the `Save` button to save the rule.

You need to clear cache from System > Tools > Cache Management once to have this in effect on the storefront.

3. MANAGE AUTO RELATED PRODUCTS RULES

Once saved successfully, it will be displayed in the grid view as shown below.



You can edit the rule from the display grid by choosing the “Edit” option from the action column.

You can also sort/filter them with different attributes like Rule Name, Rule Type, Status, Block Name, Start Date, End Date, etc.

You can also delete multiple rules simultaneously by using the Action dropdown at the top.

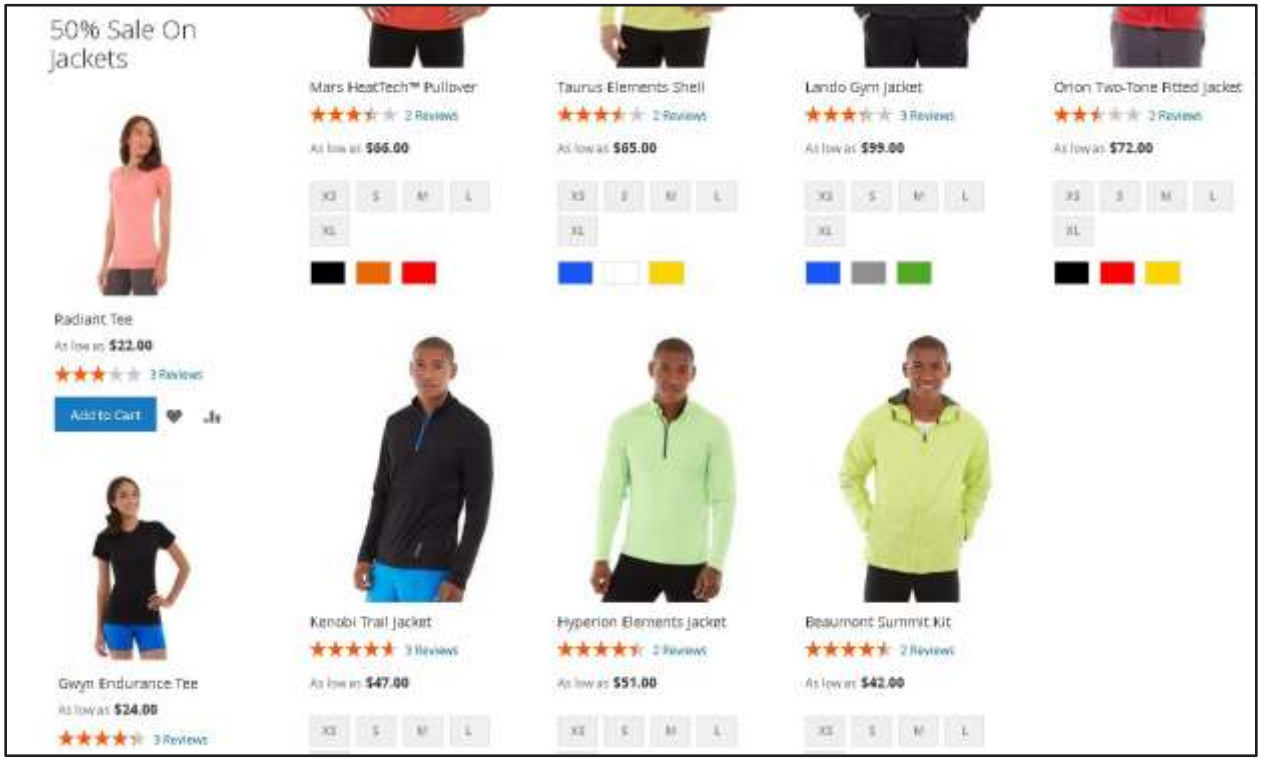
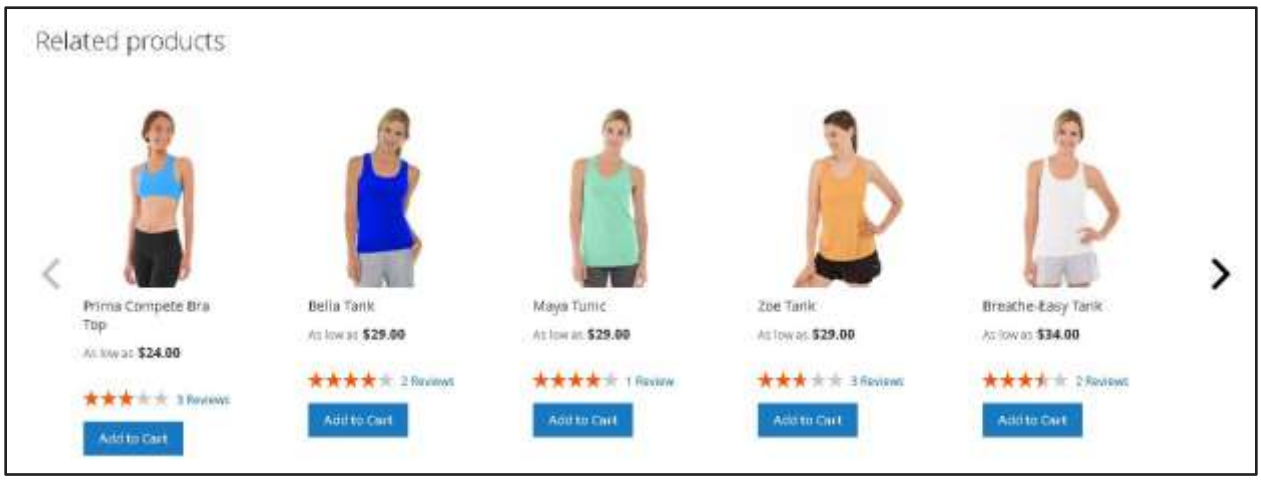
4. STOREFRONT VIEW

Clear cache from System > Tools > Cache Management if required.

You will get the related products block as shown below based on the start and end date, customer group, and the position selected in the backend.

Replacing Cross sell products on cart page:

Show offer products in sidebar on category pages.



Replacing related products on product pages.