

Cluster Categories



The Category Cluster feature is available from 4.17+. Category Hotspot Banners requires 4.31+.

NOTE - This feature must first be enabled by [Commerce Vision](#).

Categories group together Products on your website and are displayed as menu items in the navigation menu. At times your business may have specific purchasing conditions where it would be useful to have certain products displayed in one group. Customers can then easily find and select them. Examples are: items in a school year book and stationery list for a school supplies seller, or spare parts for a particular appliance or machine.

This is where cluster categories may help. A category set to cluster mode is just like any other category in that products are assigned to it and it can appear in the navigation menu. But to support this type of purchasing, clusters have some other built-in features and options.

Cluster Maintenance allows you to create and configure clusters, and add products to them. Ordering and sorting in a cluster is done by adding user-defined cluster sections through line types ('headers'). For sites on 4.31+, a hotspot banner can be created to provide a visual menu of products in a cluster. Users can click on a image area (hotspot) to be taken to the product.

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Step-by-step guide

This guide provides step-by-step instructions for configuring and using clusters.

1. Enable Cluster Maintenance

To use the feature, it needs to be switched on in the CMS.

1. In the CMS, go to **Settings Settings Feature Management Products & Categories**
2. Toggle ON **Cluster Line Type Maintenance**.



Once 'Cluster Line Type Maintenance' is toggled on in 'Settings', **Cluster LineType Maintenance** will appear as a menu item in the **Products & Categories** menu. You can select it to navigate to the Cluster Line Type Maintenance page to maintain cluster line types at any time.

2. Add Cluster Line Types

A cluster 'line type' is a header the system uses to group and sort products in a cluster category. Once created, a line type will be available for selection for all cluster categories but you can always create new ones to suit a specific category cluster. For our example, we know that some products will be compulsory, others optional, for purchasers and we want to use these buying conditions as line types. So we can create headers for two line types: 'Compulsory' and 'Optional'. (**NOTE** - You can also create a line type that allows customers to choose options from two or more products listed. For instance there may be various brands available for 'black gel pens' but the purchaser needs to buy only one. We will look at this line type later. (See [Create a 'choose one' cluster line type](#) below.)

To create a cluster line type:

1. In **Settings Cluster Line Type Maintenance**, click **Configure** to go to the 'Cluster Line Type' page.
2. Click **Add New Line Type**.
3. Enter details for **Line Type**, **HTML Prefix**, and **HTML Suffix**.

Maintain Cluster Line Type:
Cancel
Save
Save & Exit

Details

Line Type *

HTML Prefix *

HTML Suffix *

- Click **Save**. The line type will be available for selection when you configure a cluster.
- Create any other line types you need. For our example, repeat steps 3-5 to create the 'Optional' line type.

Cluster LineType Maintenance
Add New Line Type

Search...

Search:

Search

Reset Search

| Line Type | HTML Prefix | HTML Suffix | |
|------------|---------------------------|-------------|------------------------|
| Compulsory | <h4> | </h4> | Edit Delete |
| Optional | <h4> | </h4> | Edit Delete |

1
2

1 - 2 of 2 items

3. 'Enable cluster' for a category

A category has to be enabled to contain clusters (instead of directly displaying 'products' and 'sub-categories'). You can set an existing category to contain clusters or create a new category for this purpose. Just as for other categories, a cluster category is maintained in Category Maintenance. For our example, we will create a new category, then 'enable cluster' for it. (If you are working with an existing category and just want to 'enable cluster' for it, go straight to step 3.)

To add a category and 'enable cluster' for it:

- Go to **Products & Categories Category Maintenance**.
- In **Add New Category...**, enter the category name and click **Create**. The new category will be added at the bottom of the list.
- To enable the category to contain clusters, click **Edit** for the category.

4. Go to **Enable Cluster** and select **'Yes'**.

Maintain Category: SX07

Cancel Save Save & Exit

Category Information

Description
Year 7 Books

Subtitle

☐ Hidden
When checked, this category is not shown in the Menu or Category List

Category Image
Select or Upload Image

Enable Cluster *
Yes

5. Click **Save & Exit**. You are returned to the list of categories. Notice that next to this category, '0 clusters' instead of '0 products' is displayed.

Category Search:

Add New Category...

Create

| | | | | |
|-------------------|--------|-----------------|------|---------|
| Office Products | (SX03) | 5 subcategories | Edit | Options |
| Sports & Outdoors | (SX01) | 4 subcategories | Edit | Options |
| Office Furniture | (SX05) | 5 subcategories | Edit | Options |
| Work Clothing | (SX02) | 5 subcategories | Edit | Options |
| Early Childhood | (SX04) | 6 subcategories | Edit | Options |
| Rowing | (SX06) | 6 subcategories | Edit | Options |
| Year 7 Books | (SX07) | 0 clusters | Edit | Options |

4. Build a cluster for a category

Once a category has been enabled to contain clusters, you can populate it with one or more cluster sections. A cluster section consists of a heading and a line type. Products are added to each cluster section as needed. For our example, we are going to create two cluster sections, one group of pens that are compulsory, and another, for optional ones.

1. In the list of categories, hover over **Options** for the category and select **Cluster**.

Add New Category...

+ Create

| | | | | | |
|---|---------------------------------------|--------|-----------------|----------------------|-------------------------|
| ⬆ | Office Products | (SX03) | 5 subcategories | Edit | Options |
| ⬆ | Sports & Outdoors | (SX01) | 4 subcategories | Edit | Options |
| ⬆ | Office Furniture | (SX05) | 5 subcategories | Edit | Options |
| ⬆ | Work Clothing | (SX02) | 5 subcategories | Edit | Options |
| ⬆ | Early Childhood | (SX04) | 6 subcategories | Edit | Options |
| ⬆ | Rowing | (SX06) | 6 subcategories | Edit | Options |
| ⬆ | Year 7 Books | (SX07) | 6 clusters | Edit | Options |

+ Cluster

✕ Delete

2. In **Description**, enter the heading for the cluster. This text is displayed as a heading on your site so it should be informative for customers. For the example, we will add the header 'Pens: compulsory' as this tells customers they need to buy all products under this heading.

3. In **Type**, select a line type. Here, we will select 'Compulsory'.

Add Product

Description
Compulsory Products

Type

Compulsory

Optional

[Bulk Actions](#)

4. To save this cluster section, click **Add Line**. The cluster section will appear in the list.

5. Repeat steps 2 to 4 for any additional section clusters you need. For our example, we have added 'Pens: optional'.

Maintain Category Cluster: SX07

[Cancel](#)
[Save](#)
[Save and Exit](#)

[Products](#)

Add Product

Description

Type

Add Line

[Bulk Actions](#)

| | | | | | |
|---|-------------------------------------|------------|--|----------------------|------------------------|
| ☐ | | | | Edit | Remove |
| ☐ | Compulsory Products | Compulsory | | Edit | Remove |
| ☐ | Optional Products | Optional | | Edit | Remove |

You can also create a cluster section around products that are grouped together, from which the customer can select one.

Create a cluster section with product choices

You can configure a section to contain a list of products from which the customer can select one (or more).

1. In the **Cluster LineType Maintenance** page, create a line type header with an appropriate name, e.g., 'Choose One'.
2. Navigate to the **Category Cluster** (Products & Categories Category Maintenance), hover over **Options** next to your cluster and select **Cluster**.
3. In **Description**, enter a suitable heading. For our example, we will enter 'Pens: select one'.
4. In **Type**, select 'Choose One' (or the line type you created in step 1).
5. Add the products that are under this cluster section. Drag and drop them to make sure they appear under this heading. In our example, those products are: _.

| | | | | |
|--------------------------|-------------------------------|-----------------|------|---------|
| <input type="checkbox"/> | Compulsory Products | Compulsory | Edit | Remove |
| <input type="checkbox"/> | Beginning Sounds Pocket Chart | (CV180) Product | Edit | Options |
| <input type="checkbox"/> | Vowels Game - Vowel Fowl | (CV181) Product | Edit | Options |
| <input type="checkbox"/> | Consonants Game - Bug Out | (CV182) Product | Edit | Options |
| <input type="checkbox"/> | Build A Sentence | (CV190) Product | Edit | Options |
| <input type="checkbox"/> | Choose One Compulsory | Choose One | Edit | Remove |
| <input type="checkbox"/> | Sight Words Readers | (CV187) Product | Edit | Options |
| <input type="checkbox"/> | Sight Words Flash Cards | (CV186) Product | Edit | Options |
| <input type="checkbox"/> | Optional Products | Optional | Edit | Remove |
| <input type="checkbox"/> | Writing Prompt Cubes | (CV188) Product | Edit | Options |

6. Click **Edit** for each product to configure its cluster properties:
Description: the product's current description will default but you can change it to something more meaningful for this cluster if you wish.
Suggested Quantity: leave at '0'.
Is Compulsory: leave box unchecked.
Tags: add the product code of each linked product separately. Type in a product code, then hit **'Enter'** on your keyboard. This must be done for each linked product.



You must hit return so each product code displays under the field header 'Tags'. To remove a product code, click on the 'x' next to a product code.

Product: Sight Words Readers (CV187)

Description

Suggested Quantity

☒ **Is Compulsory**

Tags

Cv186

Cancel

Save

7. Save your changes.
8. Repeat steps 6-8 for each product.

5. Add Products to Cluster Sections

Once cluster sections have been created, you can add products and sort them in a particular order under each section as you wish.

1. In the **Maintain Category Cluster** page, click **Edit** for the line type you want to add products to.
2. In **Product Search**, type in the name of a product and click **Add Product**. The product will appear at the end of the list.

Maintain Category Cluster: SX07

Cancel Save Save and Exit

Products

Product Search: (CV180) Beginning Sounds Pocket Chart

Add Product

Description: Compulsory Products

Type: [dropdown]

Add Line

Bulk Actions

| | | | | |
|--------------------------|---------------------|------------|------|--------|
| <input type="checkbox"/> | Compulsory Products | Compulsory | Edit | Remove |
| <input type="checkbox"/> | Optional Products | Optional | Edit | Remove |

3. Make sure the product is in the right cluster section. If you need to, drag and drop it so it is under the right heading. In our example, we will add our first product to 'Pens: compulsory'.

Maintain Category Cluster: SX07

Cancel Save Save and Exit

Products

Product Search: [empty]

Add Product

Description: Compulsory Products

Type: [dropdown]

Add Line

Bulk Actions

| | | | | |
|--------------------------|---------------------|------------|------|--------|
| <input type="checkbox"/> | Compulsory Products | Compulsory | Edit | Remove |
| <input type="checkbox"/> | Optional Products | Optional | Edit | Remove |

4. Repeat steps 2-3 for all the products you want to add to each cluster section. **Note** - if you have more than one product in a section, you can drag and drop products so that they will display in that order on your website.

Maintain Category Cluster: SX07

Cancel Save Save and Exit

Products

Product Search: [empty]

Add Product

Description: Compulsory Products

Type: [dropdown]

Add Line

Bulk Actions

| | | | | |
|--------------------------|-------------------------------|-----------------|------|---------|
| <input type="checkbox"/> | Compulsory Products | Compulsory | Edit | Remove |
| <input type="checkbox"/> | Beginning Sounds Pocket Chart | (CV180) Product | Edit | Options |
| <input type="checkbox"/> | Vowels Game - Vowel Fowl | (CV181) Product | Edit | Options |
| <input type="checkbox"/> | Consonants Game - Bug Out | (CV182) Product | Edit | Options |
| <input type="checkbox"/> | Build A Sentence | (CV190) Product | Edit | Options |
| <input type="checkbox"/> | Sight Words Readers | (CV187) Product | Edit | Options |
| <input type="checkbox"/> | Optional Products | Optional | Edit | Remove |
| <input type="checkbox"/> | Sight Words Flash Cards | (CV186) Product | Edit | Options |
| <input type="checkbox"/> | Writing Prompt Cubes | (CV188) Product | Edit | Options |

5. Once you have finished, click **Save**. **IMPORTANT** - if you do not click **Save** (or **Save and Exit**), any changes made here will not be saved in the system,

6. Assign Products to cluster category

The products added under a cluster section have to be assigned to the cluster category in the system.

Assigning products to the cluster category is done in the same way that products are linked to any other category, through the Product Maintenance page. Once a product is saved in a cluster section, you can directly access this function rather than exit out of Category Maintenance and navigate to Product Maintenance.

1. Find the product and hover over **Options**, then select **Edit Product Categories**.
2. Click **Add Categories**.
3. In the drop down list, select the cluster category.
4. Click **Save**. The product is now assigned to the cluster category and you will be returned to the Maintain Category Cluster page.

7. Edit cluster properties for a product

Products assigned to cluster categories have special properties that need to be configured, for example, the specific buying condition (compulsory or not) and minimum number needs to be set.

1. For each product in the cluster, click **Edit** next to it.

Product: Beginning Sounds Pocket Chart (CV180)

Description
Beginning Sounds Pocket Chart

Suggested Quantity
1

☒ Is Compulsory

Tags
Add Tag...

Cancel Save

2. Edit the fields as required.

Description: the pre-existing product description will default but you can change it to something more meaningful for listing in this cluster if you wish.

Suggested Quantity: if the product is compulsory, enter '1' or another number for the minimum the buyer has to buy; if the product is optional or is a choice between two or more products, leave it at '0'.

Is Compulsory: check the box if this product is compulsory. **Note-** if this box is checked, the system will set 'Suggested Quantity' to 1 even if it is left at '0'.

Tags: tags are used to link two or more products when the customer is given a choice to select one of them. To link a product to this one, type in its product code, then hit '**Enter**' (**Return**) on your keyboard. Product codes of each linked product must be entered individually,

3. When you have finished editing the product, click **Save**.
4. The system will advise you that you will need to refresh the Cache Management for your changes to display on the website.

Maintain Category Cluster: SX07

[Cancel](#)
[Save](#)

Category product changes made here will not show on the web immediately. After editing products for all categories, go to [Cache Management](#) and clear the Product Cache.

Products

Product Search

Add Product

Description

Type

Add Line

| | | | | |
|--------------------------|--|-------------------------------|---------------------------------|----------------------|
| <input type="checkbox"/> | | Compulsory Products | Compulsory | Edit |
| <input type="checkbox"/> | | Beginning Sounds Pocket Chart | (CV180) Product | Edit |
| <input type="checkbox"/> | | Vowels Game - Vowel Fowl | (CV181) Product | Edit |
| <input type="checkbox"/> | | Consonants Game - Bug Out | (CV182) Product | Edit |
| <input type="checkbox"/> | | Build A Sentence | (CV190) Product | Edit |
| <input type="checkbox"/> | | Choose One Compulsory | Choose One | Edit |
| <input type="checkbox"/> | | Sight Words Readers | (CV187) Product | Edit |
| <input type="checkbox"/> | | Sight Words Flash Cards | (CV186) Product | Edit |
| <input type="checkbox"/> | | Optional Products | Optional | Edit |
| <input type="checkbox"/> | | Writing Prompt Cubes | (CV188) Product | Edit |

5. Click on the **Cache Management** link,

6. For Product Cache, click **Clear Cache**.

Cache Management

Product Cache

Clears the product cache information, re-indexes lucene and resets the dictionary. This is a long running process.

[Clear Cache](#)

Dictionary Reset

Resets the application dictionary

[Reset Dictionary](#)

Price Cache

Clears the product price cache for all customers.

[Clear Price Cache](#)

7. When the process is complete, click **Close**.

8. Create Cluster Hotspot Banner (optional)

See [Cluster Hotspot Banner](#) help.

Additional Information

| | |
|-------------------------------------|-----------------------|
| Minimum Version Requirements | 4.17.00 |
| Prerequisites | -- |
| Self Configurable | Yes |
| Business Function | Products & Categories |
| BPD Only? | Yes |
| B2B/B2C/Both | Both |
| Third Party Costs | n/a |

Related help

- [Cluster Categories](#)
- [Cluster Category Hotspot Banner](#)
- [Cluster Line Suggested Qty Widget](#)
- [Cluster Line Is Compulsory Widget](#)