

Creating & Managing Categories

Magento 1.9 User Guides

FOR REALIZE ONLINE CLIENTS ONLY

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Introduction

This guide will support you to create and manage product categories and sub-categories in your Magento 1.9.x website.

Logging into your Magento Admin Panel

You will need access to your Magento Admin Panel / Magento “backend” as an administrator user that has the appropriate privileges to perform the tasks outlined in this guide.

If you need any support or assistance accessing your website, phone 1300 90 58 20 or email us at support@realizeonline.com.au.



The image shows a screenshot of the Magento Admin Panel login page. On the left side, there is a vertical logo for Magento. The main content area is titled "Log in to Admin Panel". Below the title, there are two input fields: "User Name:" and "Password:". Below the "User Name:" field, there is a link that says "Forgot your password?". To the right of the "Password:" field, there is an orange "Login" button. At the bottom of the page, there is a footer that reads "Magento is a trademark of Magento Inc. Copyright © 2014 Magento Inc."

Understanding this guide

NAVIGATIONAL HINTS

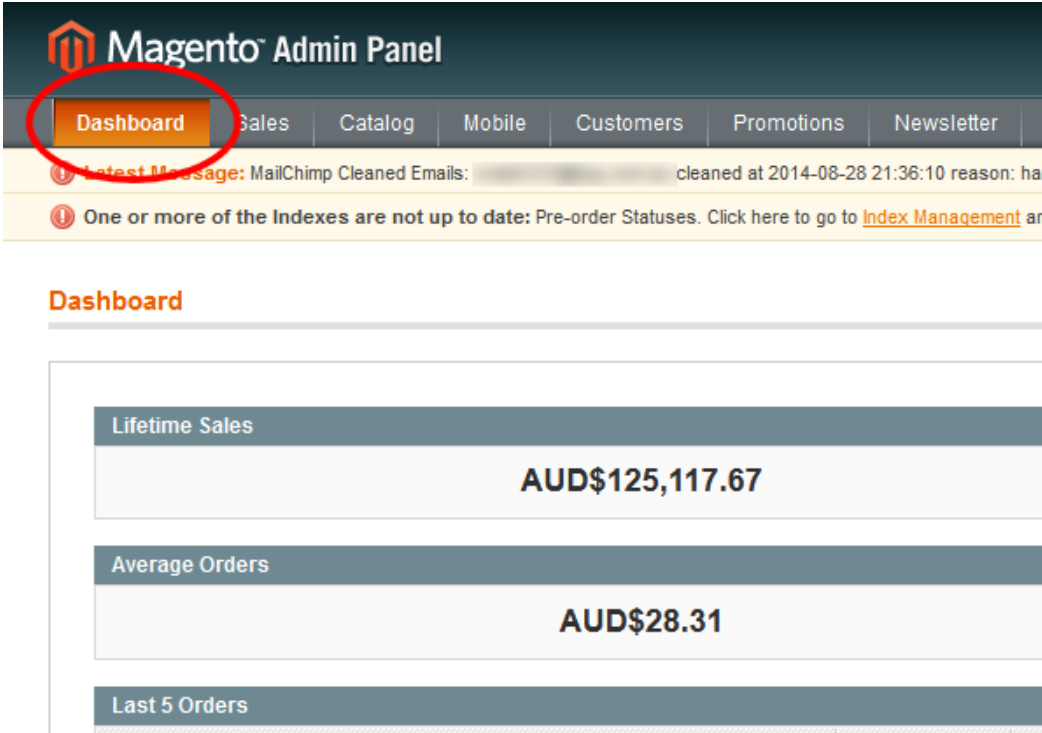
You will encounter sections where we have provided a sequence of instructions like this:

➤ 'Sales' > 'Tax' > 'Manage Tax Rules'

These are interface pointers to help you navigate a certain task, and refer to menu items, text fields, or elements you can interact with. These are divided by > from left to right.

These navigational hints may begin with a menu item, such as 'Sales' (screenshot below) which is an item commonly visible in all areas of the Magento Admin Panel / Magento backend. If any navigational hint mentioned however does NOT appear visible on the page, it will be visible for you once you return to the dashboard of the Magento backend.

To return to the dashboard, simply select the 'Dashboard' option (below top left), and continue to follow the navigational hints from there.



The screenshot shows the Magento Admin Panel interface. At the top, the 'Magento Admin Panel' logo is visible. Below the logo is a navigation bar with several menu items: 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', and 'Newsletter'. The 'Dashboard' menu item is circled in red. Below the navigation bar, there are several status messages. The first message is a 'Latest Message' about MailChimp cleaned emails. The second message is a warning: 'One or more of the indexes are not up to date: Pre-order Statuses. Click here to go to [Index Management](#) and...'. Below the messages, the 'Dashboard' section is displayed. It contains three summary cards: 'Lifetime Sales' with a value of AUD\$125,117.67, 'Average Orders' with a value of AUD\$28.31, and 'Last 5 Orders'.

Above: The 'Dashboard' menu item of the Magento backend.

What is a Category in Magento?

Every product in your catalog must be assigned to at least one category. Before you add products to your catalog, you must first establish the basic category structure of your catalog:

The screenshot displays the Magento Admin Panel interface. On the left, the 'Categories' sidebar shows a tree structure starting with 'Root Catalog (3520)'. Underneath, 'Format (2257)' is expanded to show '2015 Calendars (3319)'. Below this, various subcategories are listed, including 'Animals (387)', 'Art (502)', 'Australia (245)', 'Cats (118)', 'Celebrities (120)', 'Dogs (442)', 'Film, Music, TV and Gam', 'History and Literature (4)', 'Humour (310)', and 'Kids (63)'. A red box highlights the '2015 Calendars' category and its subcategories. On the right, the '2015 Calendars (ID: 131)' edit page is shown, with the 'General Information' tab selected. The 'Name' field contains '2015 Calendars', and the 'Description' field is empty. A 'WYSIWYG Editor' button and a 'Browse...' button are also visible.

When working in the Magento Admin Panel, the category structure is like an upside-down tree, with the root at the top. Each section of the tree can be expanded and collapsed. Any disabled or hidden categories are grayed out.

NOTE: The number of subcategory levels that you can have in the top navigation is set in the system configuration.

Adding a Category

1) Access the Categories Manager:


➤ **'Catalog' > 'Manage Categories'**

2) Firstly, choose from one of the existing "Parent Category" lists and then after that click on the "Add Subcategory" button located at top left corner to create new subcategory:

The screenshot displays the Magento Categories Manager interface. On the left, a tree view of categories is shown. The 'Add Subcategory' button is highlighted with a red box, and a red arrow points to it. The 'Dogs (442)' category is circled in red in the tree view. On the right, the 'New Subcategory' form is visible, with the 'General Information' tab selected. The form includes fields for 'Name *' and 'Description'.

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3) The new category fields will appear for you to enter.

 **New Subcategory**

General Information Display Settings Custom Design Category Products

General Information

Name *

Description

Fill out the category fields accordingly:

- i. “Name” - Specify a name for this category.
- ii. “Description” - this description is presented on the frontend.
- iii. “Image” - used for a category image. Click the Browse button next to the field to select the file. This image will appear in the frontend for each category’s page between the category name and the content.
- iv. “Page Title” - specify the title for the page, which will be displayed on the browser tab header when the customer opens this category page.
- v. “Thumbnail Image” - use the Browse button to select and upload a thumbnail image to represent the category.
- vi. “Is Active” - set this to Yes to specify that this category appears in the store.
- vii. “URL Key” - you can specify a relative URL path which can be entered in place of the standard Target Path. Is it “search engine friendly” because it can use the name of the category instead of the ID number. If you leave this blank, Magento will automatically generate a URL with the name of the category upon creation of the category. If you enter a value here manually, you cannot use spaces in this field. The URL Key field is not displayed for Root Categories.
- viii. “Meta Keywords” / “Meta Description” - specify the keywords and description for search engines to use for this category when indexing your site. If you are unsure about what to put in these two fields, just leave it blank.
- ix. “Include in Navigation Menu” - select Yes so that this new sub-category will appear in the navigation menu on the frontend.

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4) Select the “Display Settings” Tab:

New Subcategory

General Information **Display Settings** Custom Design Category Products

Display Settings

Display Mode: Products only

CMS Block: Please select a static block ...

Is Anchor: No

Available Product Listing Sort By *: Best Value (Use All)

Fill out the display settings accordingly:

- i. “Display Mode” - select one of the following options to specify how you would like your category page to appear:
 - i. Static Block only
 - ii. Static Block and product list below it
 - iii. Product list only
- ii. “CMS Block” - select the static block that you would like to be shown for this category (if selected in the “Display Mode” field). This block must first be created in the CMS section.
- iii. Anchor field - select ‘Yes’ to specify that this category page is an anchor. Anchors are used for the layered navigation in Magento.

NOTE: If you set the category to be an anchor for Layered Navigation, then your web store displays the subcategories of this category in the “Shop By” panel on the frontend of the site:

SHOP BY

CATEGORY


- > Breeds (356)
- > Funny/Cute (51)
- > General Dogs (40)

FORMAT

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- iv. “Available Product Listing Sort By” - specify the attributes by which the customer can sort the list of products in their category. By default, all available attributes can be used for sorting; clear the “Use All Available Attributes” check box to modify the list.
- v. “Default Product Listing Sort by” - select the attribute by which the product list is sorted by default. This is set in the “Catalog Configuration”, but you can clear the “Use Config Settings” check box to select a default sorting attribute for this particular category. Leave this setting to default if you are unsure.
- vi. “Layered Navigation Price Step” - specify the size of the price range to be used when calculating the price “buckets” for the Layered Navigation. This is set in the “Catalog Configuration”, but you can clear the “Use Config Settings” check box to specify a price range size for this particular category. By default this field is empty.

5) Select the “Custom Design” Tab:

 **New Subcategory**

General Information Display Settings **Custom Design** Category Products

Custom Design

Use Parent Category Settings	<input type="text" value="No"/>
Apply To Products	<input type="text" value="No"/>
Custom Design	<input type="text" value="-- Please Select --"/>
Active From	<input type="text"/> 

NOTE: The "Custom Design" tab contains additional settings to control the theme and layout updates that are used for this category page. Depending on the settings they can also affect child pages as well.

- i. Use Parent Category Settings - choose ‘Yes’ to “inherit” the setting of this subcategory from its parent category. However, if you do not want to “inherit” the settings, then just leave it to default (‘No’).
 - ii. Apply to Products - select “Yes” to apply the category page settings to the product pages of the products in this category.
- 6) Save the category by selecting the “Save Category” button located at top right corner.

Editing a Category

- 1) Access the Categories Manager:

➤ **'Catalog' > 'Manage Categories'**

- 2) Expand the relevant "Parent Category" list and select which sub-category you want to edit/update:

The screenshot displays the Magento Categories Manager interface. On the left, the 'Categories' sidebar shows a tree structure under 'Root Catalog (3520)'. The 'Breeds (361)' category is highlighted with a red circle, and a red arrow points to it from the 'Expand All' link. The right panel shows the 'Breeds (ID: 221)' edit form, with the 'General Information' tab selected. The 'Name *' field contains 'Breeds' and the 'Description' field is empty.

- 3) Make necessary changes to the fields of your category.
- 4) Save your changes by selecting the "Save Category" button located at top right corner.

Deleting a Category

1) Access the Categories Manager:

➤ **'Catalog' > 'Manage Categories'**

2) Expand the relevant "Parent Category" list and select which sub-category you want to delete:

The screenshot shows the Magento Categories Manager interface. On the left, a tree view of categories is displayed. The 'Breeds (361)' category is selected and circled in red. A red arrow points to it from the '2015 Calendars' category. On the right, the 'Breeds (ID: 221)' edit form is shown with the 'General Information' tab active. The 'Name' field contains 'Breeds'.

3) Delete your category by clicking on the "Delete Category" button located at top right corner:

The screenshot shows the bottom of the category edit form. The 'Delete Category' button is circled in red. Other buttons visible include 'Reset' and 'Save Category'.

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If you have any questions or need further assistance, contact us 1300 90 58 20 or email us support@realizeonline.com.au

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