

## CONFIGURATOR TERMINOLOGY

### Product Modeling

Product modeling is the link between configurator software and the user. It selects the content and inputs the data. Which products are included? What is the presentation sequence? What are the rules that apply to product selection?

### Categories/Sub-Categories

Categories and sub-categories are the major divisions of an on-line catalog. Like chapters of a book, categories segment the products into a logical breakdown. An example would be to “categorize” an electronics catalog into video, home audio and car audio.

Configuration does not take place at the category level. The category is a pointer to the products that will be configured.

### Products

The product is contained within one or more categories or sub-categories. It can be any article, item or even service that a customer is in search of. The configurator can generate product codes, list descriptions, feature photos, and include any kind of price or cost calculations. Shipping information can also be configured with the product.

### Attributes

The specific characteristics that determine a product are called attributes. Attributes can be used on different products across all categories. Values can be assigned to each attribute to configure the product further. Pricing and other settings can then be set to these values. The attribute value is what is selected to configure a product. For instance, for a business computer there would be a memory attribute with the values 12MB, 24MB, and 32MB. Each value could have different pricing and other settings. The memory attribute could also be used in different categories such as home computers, laptop computers, and digital cameras.

### Tabs

Tabs in a configurator are used to logically bundle product attributes. This aids the user in stepping through the product configuration process. Grouping can be done in different ways.

### Templates

Templates are designed before product modeling begins. The templates determine how the user screens look and feel during configuration. Templates are also used in quotations and carts.

### Rules

Rules can be applied during the product configuration process. They can allow or deny particular selections and even force specific selections that are contingent on certain factors.