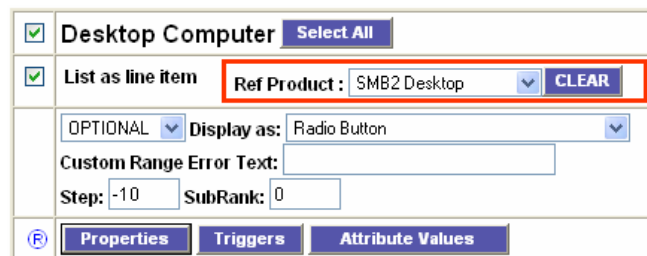


## WIZARD CATEGORY

Sometimes users that configure products in the system do not know enough about the product to intelligently pick the correct attributes or characteristics of the product that they need. In order to avoid incorrect configurations and to help the user pick a configuration that best suits them, a product can be set up that asks the user general questions about how they'll use the product.

For instance, if the product is a computer then questions could be asked about how the computer is used. The options could be for the Home, Office, or Gaming. If the user picks Gaming, then a system will be picked that has components appropriate for Gaming. In this way, a user does not need to know what components are good for a gaming system. Setting up a product in this way makes configuring a product much more user friendly.

When modeling the product, it is important to include a few things. The product must contain attributes that will be used to create a preexisting product. Like in the example above, the product modeled for the wizard must include attributes that will be passed to the product Computer. Computer is a separate product that has been modeled already. In addition to including similar attributes, there must be an attribute included that will reference the preexisting product (see Figure 43-1). This attribute also needs to be selected as a line item. The reason for this is explained later. For more information on product referencing and hierarchy, see Chapter 49.




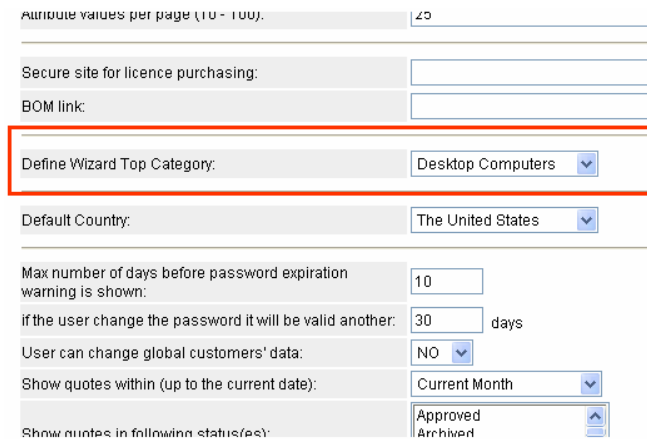
<input checked="" type="checkbox"/>	<b>Desktop Computer</b> <span>Select All</span>
<input checked="" type="checkbox"/>	<b>List as line item</b> <span>Ref Product : SMB2 Desktop</span> <span>CLEAR</span>
	OPTIONAL <span>Display as: Radio Button</span>
	Custom Range Error Text: <input type="text"/>
	Step: <input type="text" value="-10"/> SubRank: <input type="text" value="0"/>
	<span>Properties</span> <span>Triggers</span> <span>Attribute Values</span>

Figure 43-1 – Referencing Another Product in the Wizard Product

In addition to creating a product that is friendlier to users, the category the product resides in must be designated as a **Wizard** category. This is done under **Global Parameters** and **Application Parameters**, as shown in Figure 43-2.



Attribute values per page (10 - 100): 20

Secure site for licence purchasing:

BOM link:

Define Wizard Top Category: Desktop Computers

Default Country: The United States

Max number of days before password expiration warning is shown: 10

if the user change the password it will be valid another: 30 days

User can change global customers' data: NO

Show quotes within (up to the current date): Current Month

Show quotes in following status(es): Approved, Archived

Figure 43-2 – Defining a Category as a Wizard Category

Select the Category that the product resides in from the drop down box. All products in that category can be administered just like “normal” products.

A couple of things make a Wizard Category special.

- A **Wizard Mode** button is included on the user’s start page
- Items are added to the cart in a different way than normal



When a category is specified as a Wizard Category, a new button appears on the user’s start page labeled **Wizard Mode**. Clicking this button directs the user straight into the specified Wizard Category and displays the products just like any other category does.

**NOTE:** A category will not be available under New Project/Quotation if it has been specified as a Wizard Category.

Once the user goes through the configuration process of the product and adds it to the quote/cart, the product is added to the cart differently.

The wizard product itself does not get added to the cart/quote. Instead, each line item from the product is added. Each line item is added to the cart as an individual main item. This is done through the referenced product. The referenced product is loaded, and then it is passed all the attributes from the wizard product. Each referenced product, having

configured itself, is then added to the cart as separate line items. In this way, each line item can be edited separately. See Figure 43-3. The wizard product cannot be edited, but it shouldn't have to be because it only generates other configured products.

Quote #00280856							
Item#	Qty	Part Number	Description	Discount	List Price	Total Price	Actions
1	1	DT80W		0%	\$1,840.00	\$1,840.00	Not complete <a href="#">edit</a> <a href="#">copy</a> <a href="#">delete</a> <a href="#">refresh</a>
Business Desktop. memory, 400GB Ultra HDD, PMD 8 8GHz Processor, with 96x64x96x CD-RW/DVD and . Windows Home 2003 operating system.							
<b>PRODUCT</b>							
2	1	611NB/4-PMD8-CVD96-WH03ABC-FS19		0%	\$2,410.00	\$2,410.00	Complete <a href="#">edit</a> <a href="#">copy</a> <a href="#">delete</a> <a href="#">refresh</a>
This is description in English...It would never look like this but... Cost 1:100, Cost 2: 202, Cost 3: 303, Cost 4: 404							
<b>PRODUCT</b>							
3	1	611NB-F82-CVD96-WH03ABC-FS19		10%	\$2,380.00	\$2,142.00	Complete <a href="#">edit</a> <a href="#">copy</a> <a href="#">delete</a> <a href="#">refresh</a>
Fastest in performing multiple tasks=Desktop. 2.0 GB PC4000 (500 MHz), 2x512 MB Dual Channel PC3200 memory, 400GB Ultra HDD, PMD 8 8GHz Processor, with 96x64x96x CD-RW/DVD and . Windows Home 2003 operating system. warranty.							
<b>PRODUCT</b>							

Figure 43-3 – Quote Generated from Wizard Mode