RealTimeDesigner.com – Tutorials

PRODUCT CONFIGURATION AND INSTANT PRICING TOOLS

Below we'll describe a new instant pricing tool that will allow your RTD site to have flexible control over product configuration, for both products designed using our online design tool as well as order submissions not utilizing the online designer.

Many of our clients were asking for such a tool that would low users to configure various aspects of their product prior to or aside from the online design tool within RTD.

STEP 1: DEFINE CONFIGURATOR FIELDS

The first step is to define your "library" of possible options, for your products.
To do this, go into the "PRODUCT CONFIGURATOR OPTIONS => Manage/Define Configurator Fields" area of your admin panel.

Here you will have to setup a library of all the "addons" or "options" that apply to your products.
First of all, a quick description of the fields:

Show order: numeric field, determines the order to display your options
Name: the name of the property
Super Category: the parent property, if any
Image: an optional image that associated with the property
Can be user selected: toggle if the property can be manually selected/deselected by users
Optional Weight: optional "per unit" weight of the property (used for shipping cost calc) - please see STEP 4 for more informations on this
Optional Description: a brief description of the property

Now: it's important to understand how Configurator Fields will be shown to end users.
The main concept in this area is what each field is.
There are three possible field types:
NORMAL: this is just the option, and will be shown to users as a checkbox;
LEADER: a leader option will be shown to users as the name of a dropdown
SLAVE: slaves must be related to a Leader, and will be shown as the options of the dropdown

HOW TO CREATE A LEADER - SLAVE GROUP.
first of all, you must create at least two or more properties:
- one should be the "name" of the group
- the other(s) must have the "name" as super category
Next, you have to click the anchor icon close to the "name" property: passing your mouse over it, you should read "make leader".
Once clicked, the option will look with a [LEADER] prefix before the name, and all the others properties will look with a [SLAVE] one

DIFFERENCES BETWEEN A LEADER - SLAVE GROUP AND A NORMAL "SUPER CATEGORY RELATIONSHIP
Properties with "super category" relationshipis will be shown just like subproperties, and each will be a standalone checkbox.
LEADER - SLAVE groups will be shown as dropdowns, with LEADER as name and SLAVES as options.
In other words, in LEADER - SLAVE groups the LEADER can't be user selected (as it's a name, not a real option) and only one SLAVE can be selected.
This is useful, for example, in case of properties like "select the shape of your sign"

STEP 2: SELECT CONFIGURATOR FIELDS ON A PER PRODUCT BASIS

Go into the "PRODUCT OPTIONS =>Configure Products" area of your admin panel, and select the product you want to configure configurator for.
Once there, click the "Configure Product Configurator" link to launch the appropriate tool.
There are two main areas here: SETUP PROPERTIES and SETUP PROPERTIES LINKS.

The first one to look at is "SETUP PROPERTIES".
"SETUP PROPERTIES LINKS" will be discussed in the next step.
In here, on the right side, you have to check which of your options are appliable to the product you are configuring.
In other terms, you have to select from your entire "product configurator fields" library the ones that are valid for the current product.

Next, the "General Options" on the left side: they will be used only in catalog, and not in designer.
While in designer RTD can determine how many colors or letters are used in the design by simply analyzing it, this can't be done without a design to analyze.
So, if your pricing model involves different prices based on # of colors or # of letters, this section will be used.

Names are self explanatory enough, however let's give a simple example.
If you set "Colors Enabled" to YES, user will be able to select the expected number of colors to be used for the product.
He will basically see a dropdown, listing valused between "Colors Min" and "Colors Max".
If "Colors add Fullcolor" is set to YES too, also fullcolor option will be added to the dropdown.
"Colors Default", finally, is just which number will be selected as default.

In other words, these options will go to the RTD product configure pricing matrix to calculate a price for a virtual design having a user-selected number of colors and letters.

STEP 3: SET CONFIGURATOR FIELDS LINKS ON A PER PRODUCT BASIS

Now it's time to look at the second "Configure Product Configurator" link: SETUP PROPERTIES LINKS.
What you can do here is basically a dynamic control of available properties, based on user selection.
To see how it works, just click one of the radio buttons close to one of the properties: note that you will only see properties selected in STEP 2.

Once a radio is clicked, you will see a dropdown close to all properties, excluding the one you selected.
The "ON SELECT ACTIONS" column describes what happens to each property when the one you selected is selected by user.
The "ON UNSELECT ACTIONS" column describes what happens to each property when the one you selected is unselected by user (this is possible only for NORMAL options, will not be available for LEADER-SLAVE ones)

Possible values in the dropdowns are different for LEADER-SLAVE properties and NORMAL ones:

For LEADER-SLAVE properties (shown as dropdowns) values are:
Leave: default action, changes nothing
Select: selects this property
Leave and Enable: changes nothing about property selection, but make it user selectable if it was disabled
Leave and Disable: changes nothing about property selection, but make it unselectable by users
Select and Enable: selects this property and make it user selectable if it was disabled

For NORMAL properties (shown as checkboxes) values are:
Leave: default action, changes nothing
Check: flag this property
Uncheck: unflag this property
Leave and Enable: changes nothing about property selection, but make it user selectable if it was disabled
Leave and Disable: changes nothing about property selection, but make it unselectable by users
Check and Enable: flag this property and make it user selectable if it was disabled
Check and Disable: flag this property and make it unselectable by users. In other words, force this selection to be checked
Uncheck and Enable: unflag this property and make it user selectable if it was disabled
Uncheck and Disable: unflag this property and make it unselectable by users. In other words, force this selection to be unchecked

Initially this area may look confusing, but it's not that complicated.
To explain with a real example, let's suppose you have two configuator otpions:
1) a "material" dropdown, listing "plastic", "rubber" and "steel" as options (LEADER-SLAVE)
2) a "blistering" checkbox option (NORMAL)

Now, suppose you cannot do blistering if material is steel.
This means you have to create the following links:
1) force "blistering" to be unchecked and grayed out if "steel" is selected
2) re-enable "blistering" if "plastic" or "rubber" is selected
3) remove "steel" option from the material dropdown if "blistering" is checked
4) re-enable "steel" option from the material dropdown if "blistering" is unchecked

To obtain this result you would need to set fields this way:

- select the "material => plastic" property from the "SOURCE PARAMETER" column
- set the dropdown for "blistering" property to "Leave and Enable" in the "ON SELECT ACTIONS" column

- select the "material => rubber" property from the "SOURCE PARAMETER" column
- set the dropdown for "blistering" property to "Leave and Enable" in the "ON SELECT ACTIONS" column

- select the "material => steel" property from the "SOURCE PARAMETER" column
- set the dropdown for "blistering" property to "Uncheck and Disable" in the "ON SELECT ACTIONS" column

- select the "blistering" property from the "SOURCE PARAMETER" column
- set the dropdown for "material => plastic" property to "Select and Enable" in the "ON SELECT ACTIONS" column
- set the dropdown for "material => plastic" property to "Leave" in the "ON UNSELECT ACTIONS" column
- set the dropdown for "material => rubber" property to "Leave" in the "ON SELECT ACTIONS" column
- set the dropdown for "material => rubber" property to "Leave" in the "ON UNSELECT ACTIONS" column
- set the dropdown for "material => steel" property to "Leave and Disable" in the "ON SELECT ACTIONS" column
- set the dropdown for "material => steel" property to "Leave and Enable" in the "ON UNSELECT ACTIONS" column

As you can see, the trick is to disable and eventually uncheck the "blistering" property if "steel" is selected, and simply re-enable it if one of the other properties is selected.
Similar way, disable the "steel" option when "blistering" is checked (and force "plastic" to be the new default) and re-enable it when unchecked

STEP 4: USE CONFIGURATOR FIELDS WITH THE PRICING MATRIX ON A PER PRODUCT BASIS

Product configurator fields selected and defined in steps 2 and 3 can also be used as normal addons in the pricing matrix.
So, let's switch to the "Configure Pricing Structure" link to launch the pricing matrix tool.
If you have configurator fields selected for the current product, you will see a new area on top of the pricing matrix, with the following header:

PRICING ADD-ONS BASED ON PRODUCT CONFIGURATOR VALUES
fields that can't be user selected are shown in red

Just like normal addons, you can define the apply area to each of the configurator fields.
Here too possible values are different for LEADER-SLAVE properties and NORMAL ones.

If the property is a NORMAL one (checkbox), all works just like normal addons

If the property is part of a LEADER-SLAVE group (dropdown), apply area can be selected only for the leader (the dropdown "name").
"Default optional value or default selected value" selection can be used for its SLAVES, and basically it simply means that the one flagged with "YES" will be the one shown as defauls choice of the dropdown.

Next, after the configuration area, you will see the usual matrix grid. Just like addons, you will be able to assign a value to each product configurator field.
Naturally note that LEADERS cannot have any associated value, as again they're just "titles" and not real options.

Finally, a note about the "Optional Weight" field defined in STEP 1.
There you can define the per unit weight of the property, if any.
For example, if your option is something like a "boxed" checkbox, it may happen that the boxes have a weight, and so it's fair it's added to total order weight especially for shipping rate calculations.
So, let's suppose your "boxes" weights 0.02 LBS each: you would simply set "0.02" and "LBS" and values in STEP 1's "Manage/Define Configurator Fields" area.
But also pricing matrix has a role in how weight is calculated.
If in the pricing matrix you defined "boxed" addon to be a "QTY based" one, then the added weight will be 0.02 multiplied by the ordere quantity.
But if any other apply area is selected, the weight will be added only once.
You can see that, this way, you are able to set weight calculations also for product based addons as for example the shipping cartons material.

STEP 5: ADJUSTING THE LAYOUT OF INSTANT PRICING AREA IN CATALOG

To control the look of the instant pricing area in catalog you need to act at CSS level.
So, go into "SYSTEM OPTIONS => Configure RTD-Catalog => STYLE SETUP" to edit your
catalog's CSS code.
Then, if you don't have it already, add somewhere in the code this block, and then adjust it to fit
your needs.

```
/* -------------- START INSTANT PRICING STYLES ----------------- */

#catalog_instantpricing {
        width: 762px;
        margin: 6px 0 0 0;
        background: url(http://www.realtimedesigner.com/rtd_css/simplesquare/footer_bg.gif);
}

#catalog_instantpricing_top {
        background: url(http://www.realtimedesigner.com/rtd_css/simplesquare/footer_top.gif)
no-repeat;
}
#catalog_instantpricing_top p {
        height: 19px;
        width: 762px;
        margin:0;
        padding: 0;
}

#catalog_instantpricing_body {
        height: auto;
        width: 762px;
}
#catalog_instantpricing_body table{
        margin: auto;
}

#catalog_instantpricing_bottom {
        background: url(http://www.realtimedesigner.com/rtd_css/simplesquare/footer_bottom.gif)
no-repeat;
}
#catalog_instantpricing_bottom p {
        height: 21px;
        width: 762px;
        margin:0;
        padding: 0;
}

/* -------------- END INSTANT PRICING STYLES ----------------- */
```