

Understanding Basic Configurator Properties

Introduction

Configurator Layouts are the fundamental structure of a configurator's User Interface, or UI.

There are several basic visual units that are arranged into each layout.

We will see how they are most commonly displayed in the "Classic" layout, and how you can control their appearance.

We'll also create a new configurator from scratch following best practices and explore how pages and groups help organize the UI.

Understanding UI Layout Components

Every configurator needs to gather information from the user.

By understanding the various kinds of information the Classic Layout can display, you can 'show' the components your application needs; and 'hide' the ones it doesn't.

The first layout component is the most important part of any configurator: the page control.

Here is where your configurator fields and data are shown, and your user makes their selections.

If large 2D or 3D images would help your user understand this configurator's product, you can show your configurator's viewer.

The viewer is like a window alongside the page control, showing static images or dynamic 3D scenes.

As a designer, you can set the viewer to be as wide or as narrow as you need and change what's shown inside.

If the configurator has multiple pages, two other components help organize them.

First, the page tabs --listing all the configurator pages -- are usually shown along one edge of the screen.

Here, we see them along the left.

Your user can jump from one page to another by using the page tabs.

Second, the optional navigator can also help your user move from page to page.

The Navigator provides "next" and "back" arrows around the name of the current page.

It offers a more controlled, linear way for users to progress through a configurator's pages, rather than jumping from one page to the next by using the page tabs.

You can show the page tabs, the navigator, both, or neither.

Across the top, the header shows general information about the configurator.

It provides the configurator name, an optional icon, and a description.

Any buttons that should always be shown can be in an actionbar or toolbar.

And the price of the current configuration is shown in the price widget, along with other optional details such as the lead time, the overall weight of the product, or the sales bill of materials.

Now that you know the basic components of a configurator layout, rest assured you don't have to arrange them yourself.

These components are already assembled into a "Classic" layout that's built into the platform.

Best practice is to use the "Classic" layout to get started.

If your configurator needs more flexibility, you can adjust the Classic layout properties, or even build your own layout.

Using the Classic Layout

Let's create a new configurator.

In the administrative interface, click products and then configurators to see a list of configurators.

Click the add button at the bottom of the list to create a new configurator.

A new configurator editor appears.

On the left is the explorer.

It's a tree structure that shows all the parts of your configurator.

To start, we'll focus on the UI node of the explorer (it's the grid icon that's currently selected).

This may have a different name based on your settings. Here it's labeled 'Configurator'

In this node you can create and arrange all the parts of the user interface.

If a node in the explorer is selected on the left, then the right will show you details of that node.

If we select another node, like the rules node at the top, the details section is blank because no rules have been built yet.

Click on the grid-shaped UI Properties node in the explorer.

This may have a different name based on your settings. Here, it's labeled *Configurator*.

These properties define how your configurator looks.

The documentation has a full list.

Here, we'll focus on the basic properties to get a configurator started.

First, in the 'Basic' expander, give your configurator a name.

Here's a tip: as you're learning, you can start the name of a configurator you're working on with your initials.

That will make it easier to find in the future.

Second, in the 'Layout' expander, notice that you're using the "Classic" layout.

All the options for the classic layout are shown, and the defaults are set to meet most needs.

Third, scroll down to the 'Viewer' expander and open it.

Here you will specify what you would like to have appear in the viewer.

By default, the viewer mode is none, so your configurator will stretch to fill the entire screen.

Let's change that. Set the viewer mode to "media".

You can select the media you would like shown in the viewer or leave it blank.

Now your configurator will only fill a portion of the screen, leaving the rest for the viewer.

Let's save what we've built so far.

When designing your configurator in the editor, you can save your work by clicking the save button at the bottom of the screen.

A spinning cube appears while your work is being saved.

To both save your work and see a preview of the configurator, click the run button.

A new tab opens in your browser, showing a test of the running configurator as your users would see it.

You can close this test window when you're done, to return to the configurator editor.

You may want to bookmark this editor page in your web browser.

That way, it'll be just a click away as you build.

Understanding Pages

When you created this configurator, it came with a page, a group, and a field.

In the configurator editor's explorer, click the triangle next to the UI node to drill down, and see the components within that node.

A UI consists of one or more pages, so you see the pages node appear.

Drill down into the pages node.

You will see there's only one page inside, called "Page".

Click directly on the node called "Page" and the properties of that specific page appear to the right.

Also note that a preview of the page may also appear on the far side of the properties.

This preview is not a running configurator: it's just a quick peek at the basics of the page contents to help you design the UI.

Turn this page preview on or off by clicking the eye icon in the upper-right corner of the editor.

Resize it by dragging its edge.

Pages, like every node in the explorer, must have a name.

The name of a node lets you refer to it and change it programmatically.

Let's give our page a more descriptive name.

Change the Name of the page from "Page" to "p-About".

It's a suggested best practice to using a prefix letter when naming your UI elements. This leading letter (like "p" for a page) helps you find elements easily when doing later programming.

UI components like pages can also have an optional Label.

If a label is specified, it will be shown to your users instead of the name.

Since the name 'p-About' is handy for us but confusing to our users, set the Label of the page to a user-friendly phrase, like "About Your Cube".

Finally, note that the page has a visible checkbox.

Any UI component can be shown or hidden by turning on or off its visibility.

Understanding Groups

Even though our configurator is pretty simple, it's good to stay organized.

Groups are a type of UI component that help organize other elements visually.

In this Cube Configurator example, we will soon allow our users to specify the height, width, and depth of their custom cube.

A group can help us keep these 3 pieces of data together.

In the explorer, click directly on the group and you'll see the properties appear to the right.

Change the name from "Group" to "g-Dimensions". Remember the best-practice naming convention.

Change the label to "Cube Dimensions"

Leave the show label set to true.

Leave the visible set to true.

Save and preview your work by clicking the run button.

You can see your updated page label and group label.

Recap

Configurators can show a lot of information to your user, and layout components help you build your UI.

The "Classic" layout lets you choose which components you want to show, and how they will appear.

In the future, you can adjust the classic layout in this configurator, or even use a different layout.

Pages and Groups help you organize your configurator.

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