

Launching the Configurator as a Stand-alone App

Before building a configurator, you should understand a few key processes. First, let's find and launch a product configurator. Then we will cover some basic navigation and submit a configurator into a quote. After we submit the quote, we will review the status and finally locate the documentation that was built for the quote. Choose an option to get started!

Find and Launch a Product Configurator

A user can begin their configuration from many different starting points. Here, we will introduce the most basic way to find and launch a product configurator: as a registered user of the configurator system. For example, this user could be a salesperson or product manager who works for the company or a known customer who creates many quotes.

Just like any other shopping experience, your user will

- Search for the product they want to buy
- Adjust the product to their liking
- Submit their request for processing
- And have the option to review their request to look at its status or find related documentation.

You start by logging into the stand-alone configurator application.

The top of the screen shows two tabs:

- The Products tab displays all the things you can request, and
- The Quotes tab contains all the things you (or others you work with) have already requested.

Start a new configuration by browsing the products listed in the Products tab. By default, the Products tab is displayed after logging in. When you view the Products tab, notice the column of product categories on the left organizing the products. By default, you view the "all" category, which shows all the standard or configurable products you are authorized to see. Clicking any category on the left, changes the products listed on the right. The products listed on the right may appear as square image tiles, or as entries in a list. You can choose either display style by clicking the view icons in the upper-right. Not sure which product you would like to buy? You can browse through the product categories by clicking them on the left. All the products in that category appear on the right. Click the name of the product to launch it. Do you know the exact name of the product you want to buy? Click on the "all" category and begin typing the first few letters of that name into the search box.

All matching products will appear. Do you remember only a part of the name of the product? No problem. You can type the part that you remember between asterisks. These are wild-cards characters for searches. All the products that contain that text appear in the list. To clear the search results and return to a listing of all products in the selected category, just clear the search box and press enter. All the products in the category will reappear. If your company sells hundreds of products, your administrator may have set up parametric search. You can learn more about parametric search in the online documentation. Once you've found the product you like, click its name to learn more. If it's a standard product that requires no configuration, you can add it to your quote. If

it's a configured product, you can begin configuring it. Whoops! Was this the wrong product? No problem. Just click the Products tab at any time to return to the list of products.

Navigate Through a Configurator and Scene

When you click a configured product, you open a configurator that helps you understand the product options so you can adjust it to meet your needs. Let's get an overview of the configurator. Usually, configured products have more options than can fit on the screen. So, the options are broken up into pages. You can find the page bar along one side of the screen. Here it's shown on the left. You can move through the configurator from one page to the next by clicking any page tab you'd like to open in the page bar. Each page of the configurator has information about your product, and options for you to select from. Look for images and descriptive text to help you understand the option, or a pop-up help bubble next to the option for even more information. On some configurators, you can also see a navigator at the bottom of the page. Click the arrows in the navigator to move to the next or previous page. Many configurators are also paired with a viewer. A viewer shows a representation of the product you are configuring, and it changes as you make your selections. This can help you understand the product, and confirm you're getting what you want. If the viewer image is 2D, you may be able to click parts of it or drag parts of it. If the image is 3D, you may be able to Drag with your mouse to rotate the 3D scene to different angles. You may also be able to Control-drag to move the camera without rotating it or even Scroll the wheel to zoom in and out. If you're using a touch-enabled device, such as a phone or tablet, you can use the equivalent touch gestures. Finally, you can also look for buttons or pulsing colors or objects in the viewer. These visual cues highlight clickable areas to help you explore or configure the product.

Save a Configurator and Submit a Quote

If you want to save your configuration so you can return to it later, click Save. You can bookmark the resulting web page and come back where you left off. Think of this saved configured product as a draft and you have not yet submitted it for processing. If you're happy with your configuration and want to submit it for processing, click Save to quote. Your configured product will be saved to a new quote, and you can see the quote details appear. In the quote, you can see general information in the quote header across the top. You can add other products to this quote, change quantities of existing products, and make other edits by clicking the item's context menu. Notice that your current unsubmitted quote also appears as a shopping cart icon in the upper-right corner of the window. A number over the cart reminds you how many items are in the cart. You can repeat this process of browsing products in the Products tab, adding a product to your unsubmitted quote, and adjusting that product in your quote until you see all the items you need in your quote. When you're ready, click Submit at the bottom of the quote. The quote will be submitted into a workflow, which creates any documents and gathers any approvals that might be needed.

Find a Submitted Quote and Output Documents

After you submit your quote, you can watch the State of the quote change in the upper-right corner. To see a list of all the quotes you have the rights to view, including the one you've just submitted, click the Quotes menu item across the top of the screen at any time. This list of quotes can be sorted by any of the columns shown. For more info on any quote, click the name to return to the quote itself. If any documentation has been created, you can see those attachments. They will appear in the quote header if they relate to the entire quote, or beneath a product in the quote if they relate to just that one product. Click the arrow next to the name of the product to see its attachments. If a quote reaches a state in the workflow that requires your input, or when documents are ready for your review, you'll receive a notification. This will appear either as an email, or as a notification within

the notifications list. The notifications list appears when you click the globe icon and is always visible in the upper-right corner. Click the name of any quote in a notification to open that quote and see any related attachments.

Recap

You've learned how to use a configurator.

Specifically, you have

- Found and launched a product configurator.
- Navigated through a configurator and viewer.
- Saved your configured product into a quote and submitted that quote.
- And found your submitted quote and its output documents.

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