

# X-Configurator add-on module for X-Cart 4.2.2

User Manual



© 2009 Ruslan R. Fazliev. All rights reserved.

Company website: [www.x-cart.com](http://www.x-cart.com)

Revision date: Jun/30/2009

# **X-Configurator add-on module for X-Cart 4.2.2**

## **User Manual**

---

© 2009 Ruslan R. Fazliev. All rights reserved.

*This manual is X-Cart's official documentation for X-Configurator add-on module. It covers the functionality of Admin zone and is applicable for X-Cart versions 4.2.2 (GOLD and PRO editions).*

## **X-Configurator add-on module for X-Cart 4.2.2. User manual.**

**© 2009 Ruslan R. Fazliev. All rights reserved.**

All rights reserved. No part of this work may be reproduced in any form or by any means without the expressed written permission of the copyright owner.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: 30.06.2009

# Table of Contents

<b>1 General Information</b> .....	<b>1</b>
<b>2 Installation</b> .....	<b>2</b>
<b>3 Managing Configurable Products (Admin/Provider zone)</b> .....	<b>3</b>
<b>3.1 Product Configurator menu</b> .....	<b>3</b>
<b>3.2 Getting info about Product Configurator</b> .....	<b>4</b>
<b>3.3 Defining product types and specifications</b> .....	<b>6</b>
<b>3.4 Classifying products</b> .....	<b>8</b>
<b>3.4.1 Assigning products to product types</b> .....	<b>9</b>
Attributing specifications to products.....	10
Setting product requirements.....	10
<b>3.5 Importing/Exporting data</b> .....	<b>11</b>
<b>3.5.1 Product Configurator: CSV Format</b> .....	<b>12</b>
<b>3.6 Adding configurable products</b> .....	<b>15</b>
<b>3.7 Searching for configurable products</b> .....	<b>17</b>
<b>3.7.1 Operating search results</b> .....	<b>18</b>
<b>3.8 Modifying configurable products info</b> .....	<b>19</b>
<b>3.8.1 Modifying the details of a configurable product</b> .....	<b>19</b>
Adding and removing international descriptions.....	19
Adding and removing product options .....	21
Adding and removing up-selling links.....	24
Adding and removing detailed images.....	25
Editing reviews.....	26
<b>3.9 Managing the Configuration Wizard</b> .....	<b>27</b>
<b>4 Ordering Configurable Products (Customer zone)</b> .....	<b>34</b>

Thank you for choosing X-Cart software solutions!

# 1 General Information

**X-Configurator** (also known as Product Configurator) is a module for X-Cart which allows you to create and sell composite products or systems that can consist of many interchangeable or optional components (like computer systems, home cinemas, etc). It can also be used for creating sets of products (for example, suits, accessories sets, etc). The customer himself can define what components the "complex" product should consist of. The module ensures that the product will be in working condition when assembled: it enables you to define specifications and requirements for each component to avoid incompatibility between the components within one configurable product (for example, AMD motherboard is compatible with Athlon processors but incompatible with Intel Pentium).

**X-Configurator** is a perfect solution for web stores which are selling computers, software, mobile accessories, web hosting plans, etc. In any case, your customer gets a complete and functional set customized according to his preferences. If your store sells combination products, X-Configurator can be applied to enhance your customers' satisfaction and increase your sales.

Key features:

- Unlimited "complex" products
- Flexible configuration
- Compatibility rules for parts of the configured product
- Types, modifications and properties for products
- Step-by-step product creation

**X-Configurator** is a reliable up-to-date solution that can help your online business succeed in the competitive market of today. More products of X-Cart family are available at <http://www.x-cart.com/>.

## 2 Installation

For successful installation and work of the module you need an already installed X-Cart 4.2.2.

The process of installing the module X-Configurator is the same for X-Cart Gold and X-Cart Pro.

To install the module, take the following steps:

1. Download the module distributive from the File area. The file you need is named **x-pconf-x.y.z.tgz**, where x, y and z are the numbers of the module version (must be the same as the version of your X-Cart).
2. Uncompress the archive file x-pconf-x.y.z.tgz and copy the resulting files to the directory where your X-Cart is installed. The file INSTALL.X-PCONF provides instructions for installing the module.

**Note:** Please make sure you keep the directory structure during unpacking and uploading, otherwise some necessary files can be overwritten!

3. Run in the browser the installation script:

`http://www.yourhost.com/xcart_dir/install-xpconf.php`

X-Configurator installation wizard will be launched.

4. Enter your authentication code, read the License Agreement and, if you accept the terms and conditions of the License Agreement, press the **Next** button.

**Note.** The authentication code is issued on completion of X-Cart installation. It is used to prevent unauthorized re-installation of X-Cart. You also need to know this code to install any purchased X-Cart modules. If you do not remember your Auth code, you can look it up at any time in the file include/install.php.

5. The installation script will copy the files and make all the necessary changes in the database.
6. After the installation is completed you will get a message informing you of the completion of the installation process.

Go to the Modules section of X-Cart administrative zone and enable Product Configurator.

# 3 Managing Configurable Products (Admin/Provider zone)

## 3.1 Product Configurator menu

To start using X-Configurator, click on *Product Configurator* item of Products menu in X-Cart admin zone (X-Cart GOLD) or provider zone (X-Cart PRO). 'Product Configurator' page will be displayed.

It contains the Product Configurator menu:

**See also:**

- [Search for configurable products](#)
- [Add a configurable product](#)
- [Define product types](#)
- [About Product Configurator](#)

When working on a particular configurable product in Product Configurator, the menu expands to include more items.

In this section:	See also:
<ul style="list-style-type: none"><li>• <a href="#">Product details</a></li><li>• <a href="#">International descriptions</a></li><li>• <a href="#">Product options</a></li><li>• <a href="#">Upselling links</a></li><li>• <a href="#">Detailed images</a></li><li>• <a href="#">Customer Reviews</a></li><li>.....</li><li>• <a href="#">Manage configuration wizard</a></li></ul>	<ul style="list-style-type: none"><li>• <a href="#">Search for products</a></li><li>• <a href="#">Add product</a></li><li>• <a href="#">Categories</a></li><li>• <a href="#">Orders</a></li><li>.....</li><li>• <a href="#">Search for configurable products</a></li><li>• <a href="#">Add a configurable product</a></li><li>• <a href="#">Define product types</a></li><li>• <a href="#">About Product Configurator</a></li></ul>

The menu items are links: clicking on a link displays the corresponding module section below the menu. Further on we are going to take a closer look at each of the Product Configurator sections.

## 3.2 Getting info about Product Configurator

Clicking on *About Product Configurator* link displays general information about the module. This section gives you a basic idea of how the module works. It can be used for quick reference when you begin using X-Configurator. We quote the whole text of this section here for your convenience

### About Product Configurator

Product configurator is a module for X-Cart which allows you to create and sell combined products or systems that can consist of various components (like computer systems, home cinemas, air conditioning systems etc.), it can also be used for creating sets of products, for example, suits, skiing accessories, sets of golf clubs etc. to help a customer get a complete and functional set that is customized according to his preferences. When using a product configuration you can define of what components your combined product should consist, each component can be mandatory or optional. Besides, you can define specifications and requirements for each component to avoid incompatibility between some of the components.

#### Configurator Steps and Slots

Configurable product can be created through Product Configurator::Add Configurable Product menu so that it could appear in any category just as any other product. However, before this product can be added to shopping cart , a customer has to configure it - select from which components the product should be assembled. To set up a scenario for configuration process you need to use the Configuration Wizard. Using Manage Configuration Wizard menu you should create a number of steps, each step should have one or more slots for components. Let's suppose that you are going to sell custom configured computer systems, then for your configurable computer you can define the following steps:

Step 1: Select Case and monitor: containing slots for Computer Case and Monitor

Step 2: Select System configuration: containing slots for CPU, Motherboard, Memory units

Step 3: Select Storage devices: containing slots for Hard Drive, CD/DVD Drives

Step 4: Select Multimedia: containing slots for Video card, Sound card, Speakers

The number of steps and slots in each step is unlimited so you can configure a scenario that is suitable for your composite products. You can define some slots as optional so that a customer could leave them blank.

#### Product Types

When the necessary steps and slots are created you should define what products can fit in each slot. For



this purpose you should use Product Types. For each slot you can define which Product Types can fit in this slot. First you should plan what product types are necessary for your purposes and set up product types in Define Product Types menu.

For example you can create a product type "LCD Monitors" to define that it will be used with Monitor slot for "Case and Monitor" step. Then you should go to Modify Product page for every model of the LCD monitors that you have in your shop and associate this product with "LCD Monitors" product type using Product Classification section on Modify Product page. Then go to slot configuration dialog and define a new slot configuration rule, in this rule specify "LCD Monitors" as the target product type for this slot.

When a customer is selecting components for the slot only products that can fit in this slot will be available for selection.

### **Product Specifications**

Each product type can have a list of specifications. Specifications are used in product configurator to avoid incompatible components in a configurable product. For each product type you can create a list of specifications and when assigning a product to some product type you can define what specifications from the list are attributable to this product. You can also define products of what product types and with what specifications are required for this product. To define product specifications and product requirements please go to Product Classification section on Modify Product page.

For example, you can create Product type Speakers and a speaker of model X that has only digital 5.1 input so it needs a sound card with digital 5.1 output, otherwise this component will not work. In product type "Sound Cards" you can create the following possible specifications: Stereo Analog output, Analog 5.1 output, Digital 5.1 output. If sound card supports Digital 5.1 output you should select this specification from the list on the Product Classification section on Modify Product page for this sound card. Now you should specify in the Product Classification section for the speakers X that this product requires a product the product type of which is "Sound Cards" with specification Digital 5.1 output.

Product requirements also affect the list of products that is displayed when a customer selects a product to be placed in a slot. For example if no speakers are selected, you can choose a sound card with any output for your computer. However, if you have already selected speakers that require Digital 5.1 output you will be able to choose only from sound cards that support this specification and vice versa.

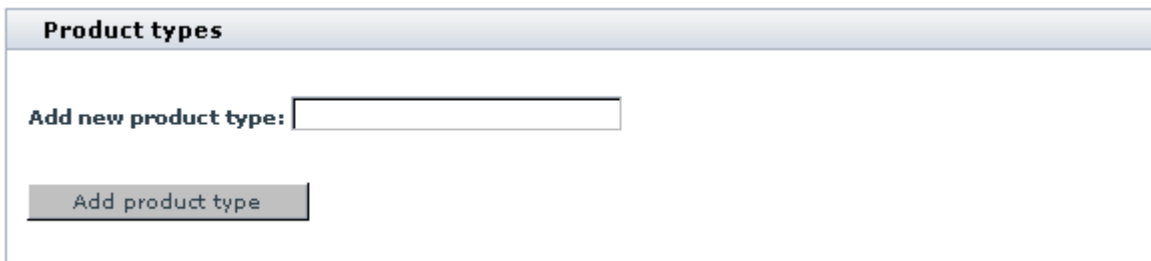
### **Bundled Products**

You may want to sell some products only as a part of a composite product. You can control this via Availability drop down on Modify Product page. When Available for Sale option is selected a product can be sold both as a part of a composite product and separately. When Bundled is selected a product can only be sold as a part of a composite product. When Disabled is selected the product is not available for sale.

Note: For complex configurable products you can create more advanced fitting rules: assigning several Product types to one slot, combining them with AND, OR logical operators, assigning one product to several product types. Each of the products can have its own product requirements.

## 3.3 Defining product types and specifications

*Define product types* link of the Product Configurator menu is used to access Product types section where you can define product types and specifications to use in your store.



The screenshot shows a web interface for managing product types. At the top, there is a header bar with the text "Product types". Below the header, there is a text input field with the label "Add new product type:". Below the input field, there is a button with the text "Add product type".

To add a new product type, enter the desired product type name into the *Add new product type* field. Click on **Add/Update** button. The new product type will be added to the list above. Product types are sorted alphabetically, but for convenience you might wish to arrange them in a different order. This can be done by assigning a position number to each type. Enter the desired position number in the appropriate field of *Pos.* column, click on **Add/Update**. Types with greater numbers will be located closer to the end of the list. For long lists paging is provided. You can set the number of types you would like to be shown per page. Enter the number into the *Items per page* field and click on **Display** button.

### Product types

Result pages: 1 2

Items per page:

Pos.	Product types	Specifications
<input type="text" value="0"/> <input type="checkbox"/>	<input type="text" value="Mobile phone"/>	New specification: <input type="text"/>
<input type="text" value="10"/> <input type="checkbox"/>	<input type="text" value="Mobile battery"/>	New specification: <input type="text"/>

Add new product type:

**Note:** To delete items please tick the appropriate checkboxes.

Result pages: 1 2

Items per page:

Within each of the product types you can set up an unlimited number of product specifications. To add a new specification, enter the new specification name into the *New specification* field. Click on **Add/Update**. The order for the specifications to be displayed in can be set similarly to setting the order of product types: by entering the appropriate position numbers into the corresponding fields and clicking on **Add/Update**.

### Product types

Items per page:

Result pages: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#)

Pos.	Product types	Specifications
10	<input type="checkbox"/> Mobile phone	10 <input type="checkbox"/> Ericsson T28 World 20 <input type="checkbox"/> Motorola M682 30 <input type="checkbox"/> Motorola StarTAC ST7797 New specification: <input style="width: 100%;" type="text"/>
20	<input type="checkbox"/> Mobile battery	10 <input type="checkbox"/> M3682 Battery 20 <input type="checkbox"/> ST7797 Battery 30 <input type="checkbox"/> T28 Battery New specification: <input style="width: 100%;" type="text"/>

Add new product type:

**Note:** To delete items please tick the appropriate checkboxes.

Items per page:

Result pages: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#)

To delete an existing product type or specification select the check box corresponding to this product type or specification, and click on **Delete selected** button.

## 3.4 Classifying products

After the necessary product types and specifications have been created, products can be classified. This chapter explains how to:

- assign products to product types
- attribute specifications to products
- set product requirements

To classify a product you should use Product classification section of Modify Product page (the page displayed when you click on **Modify** button in Product Details section). If so far the product has not been assigned to any type, the section will look like this:

### X-Configurator classification

The product is not assigned to any product type.

**Add product type:**

Click on the 'Submit' button below to update data, add a new product type and delete selected items.

### 3.4.1 Assigning products to product types

The product can be assigned to a product type by selecting the necessary product type name from the drop-down list and clicking on **Apply** button. The product type to which the product is assigned appears in Product Classification section. Any product may be assigned to more than one product type.

### X-Configurator classification

**Notes:**

- To delete items please tick the appropriate checkboxes.
- Hold Ctrl key to select multiple specifications.

**Mobile phone**

---

Specifications for the product:	Requirements for the product:
<input type="text" value="Ericsson T28 World"/> <input type="text" value="Motorola M682"/> <input type="text" value="Motorola StarTAC ST7797"/>	<b>Add product type:</b> <input type="text"/>

(\*) See note below.

(\*) **Note:** if you have another product which requires only a certain specification of this product type, make sure you define product specifications. A product type with no specifications defined will satisfy all possible requirements.

**Add product type:**

Click on the 'Submit' button below to update data, add a new product type and delete selected items.

If the product should not belong to a previously selected type any longer, you can delete this type by selecting the check box next to it and clicking on **Apply** button.

## 3.4.1.1 Attributing specifications to products

The field below the product type name displays all the specifications within this type (only if specifications were set up). To attribute a specification to the product, select the necessary specification from the list and click on **Apply**.

### X-Configurator classification

**Notes:**  
- To delete items please tick the appropriate checkboxes.  
- Hold Ctrl key to select multiple specifications.

**Mobile phone**

---

Specifications for the product:	Requirements for the product:
<ul style="list-style-type: none"><li>Ericsson T28 World</li><li>Motorola M682</li><li>Motorola StarTAC ST7797</li></ul>	(*) See note below. Add product type: <input type="text"/>

(\*) **Note:** if you have another product which requires only a certain specification of this product type, make sure you define product specifications. A product type with no specifications defined will satisfy all possible requirements.

Add product type:

Click on the 'Submit' button below to update data, add a new product type and delete selected items.

To select multiple specifications, press and hold Ctrl key.

## 3.4.1.1.1 Setting product requirements

To set requirements for the product, select the name of a product type required for this product from the drop-down list in the requirements area of the section. Click on **Apply**. The type will be added to the requirements list (you can set as many requirements for the product as you like). You can set more specific requirements by selecting a required specification within the required product type: select the necessary specification from the list below the required product type name, then click on **Apply**. To select multiple specifications, press and hold Ctrl key.

**X-Configurator classification**

**Notes:**  
 - To delete items please tick the appropriate checkboxes.  
 - Hold Ctrl key to select multiple specifications.

**Mobile phone**

---

Specifications for the product:	Requirements for the product:
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <span style="background-color: #000080; color: #ffffff; padding: 2px;">Ericsson T28 World</span>            Motorola M682            Motorola StarTAC ST7797         </div>	<p><input type="checkbox"/> <b>Mobile battery</b></p> <hr/> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <span style="background-color: #000080; color: #ffffff; padding: 2px;">T28 Battery</span>            M3682 Battery            ST7797 Battery         </div> <p><input type="checkbox"/> <b>Mobile Charger</b></p> <hr/> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <span style="background-color: #000080; color: #ffffff; padding: 2px;">T28 Charger</span>            M3682 Charger            ST7797 Charger         </div> <p><input type="checkbox"/> <b>Mobile Leather Case</b></p> <hr/> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <span style="background-color: #000080; color: #ffffff; padding: 2px;">T28 Leather Case</span>            M3682 Leather Case            ST7797 Leather Case         </div>
Add product type: <input style="width: 100px;" type="text"/>	Add product type: <input style="width: 100px;" type="text"/>

Click on the 'Submit' button below to update data, add a new product type and delete selected items.

To delete a requirement select its check box and click on **Apply**.

## 3.5 Importing/Exporting data

### Import/Export procedures in X-Cart

X-Cart 4.1.x features export and import of almost all X-Cart data types. Export and import procedures facilitate the updating of your store data and allow you to consistently transfer data when upgrading your store or moving it to a new location.

Basic information is available in the Reference Manual for X-Cart shopping cart software, v. 4.2.2: on export

procedures - section "Exporting Data", import procedures - in the section "Importing Data".

Detailed information on X-Cart import and export can be found in the Import/Export Guide for X-Cart v4.1.x (available for download from <http://www.x-cart.com/manuals.html>).

### 3.5.1 Product Configurator: CSV Format

Types of products are imported/exported through the section [PRODUCT\_CONFIGURATOR\_TYPES].

*Format:*

!TYPEID - Type ID

!TYPE - Name of the type

!ORDERBY - Number of the type in the type list

!SPECID - Unique ID of the specification of this type

!SPECIFICATION - Name of specification

!SPEC\_ORDERBY - Number of specification

*Required fields:*

!TYPE

Product configurator classes are imported/exported through the section [PRODUCT\_CONFIGURATOR\_CLASSES].

*Format:*

!CLASSID - Class ID

!PRODUCTID - ProductId of the product

!PRODUCTCODE - SKU number of the product

!PRODUCT - Product name

!TYPE - Product type (conf. PRODUCT\_CONFIGURATOR\_TYPES)

!SPECIFICATIONS - List of specifications of the product type (TYPE), which are attributed to this product



!REQUIRED\_TYPES - List of compatible types for this product

!REQUIRED\_SPECS - List of product type specifications, compatible with this product

*Required fields:*

!TYPE

Configurator steps for configurable products are imported/exported through the section [PRODUCT\_CONFIGURATOR\_STEPS]

*Format:*

!PRODUCTID - ProductId

!PRODUCTCODE - SKU number of the product

!PRODUCT - Product name

!STEPID - ID of the step

!ORDERBY - Number of the step

*Required fields:*

!STEPID

International descriptions of configurator steps are imported/exported through the section [MULTILANGUAGE\_PRODUCT\_CONFIGURATOR\_STEPS]

*Format:*

!STEPID - ID of the configurator step (conf. PRODUCT\_CONFIGURATOR\_STEPS)

!CODE - Code of the language

!STEP - Name of the step

!DESCR - Step description

*Required fields:*

!STEPID

!CODE

Descriptions of the product configurator step slots are imported/exported through the section [PRODUCT\_CONFIGURATOR\_SLOTS]

*Format:*

!PRODUCTID - ProductId

!PRODUCTCODE - SKU number of the product

!PRODUCT - Product name

!STEPID - Step ID

!SLOTID - Slot ID

!STATUS - Status of the slot (required, optional, inactive)

!ORDERBY - Number of the slot

!RULE\_TYPES - Product Configurator types (PRODUCT\_CONFIGURATOR\_TYPES), which can be contained in the slot

!MARKUP - Price modifier

!MARKUP\_TYPE - Type of the modifier (% - percent, \$ - absolute)

!MEMBERSHIP - ID of the user's membership (numeric).

*Required fields:*

!STEPID

!SLOTID

International slot names and descriptions are imported/exported through the section [MULTILANGUAGE\_PRODUCT\_CONFIGURATOR\_SLOTS]

*Format:*

!SLOTID - Slot ID

!CODE - Code of the language

!SLOT - Slot name

!DESCR - Slot description

*Required fields:*

!SLOTID

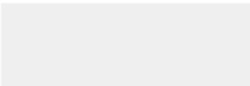
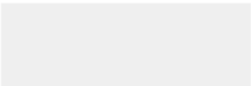
!CODE

## 3.6 Adding configurable products

To create a new configurable product, click on *Add a configurable product* link in the Product Configurator menu. You will be transferred to the section where a new configurable product can be created. You will see that adding a configurable product to your store is pretty much like adding an ordinary product.

### Product details

#### Product images

<b>Image:</b>	<b>Thumbnail:</b>	<a href="#">Need help?</a>
 No image available	 No image available	

**META keywords:**

**META description:**

**Minimum order quantity**

**Membership**

- All
- Premium
- Wholesale

To select more than one entry, hold 'Ctrl' key while clicking on them with your mouse. To unselect, hold 'Ctrl' and click on the selected items again.

To add a configurable product:

1. Select an image for the product thumbnail (Click on **Change image**, the Image selection window will appear. You can use images located on the server, on your local computer, or on the Internet. Select the desired image file and click on **Apply**). Please remember that the image will be saved only after you click on the **Save** button in the lower part of the New configurable product section.
2. Choose the main category and other appropriate categories for the product, if it is necessary.
3. Choose the current status of your product from the drop-down list (either *Available for sale* or *Disabled*).

4. Enter the product SKU and title, the short and detailed descriptions.
5. Click on **Save**. The configurable product will be created. As soon as the page reloads, you will find yourself in Modify Product page for this product and will be able to edit the product details, add international descriptions, define product options, add upselling links and upload detailed images. You do not have to complete all these sections at once, as you will be able to return to Modify Product page at any time later. (See topic Modifying configurable products info).

The configurable product price depends on the price of the product components and may be affected by the price modifiers which can be set up for any slot in Configuration Wizard (See the section Managing the Configuration Wizard). There are no fields in which you could enter the quantity of the configurable product in stock and the low limit in stock. The quantity of the product available for sale depends only on the quantity and low limit of the product components and will be defined automatically.

## 3.7 Searching for configurable products

'Search products' is the section displayed below the Product Configurator menu when you open the 'Product Configurator' page for the first time. If needed, this section can be accessed at any time later on by clicking on the *Search for configurable products* link. This section allows you to search for configurable products in your store.

**Search for products**

**Product #:**

**Product title:**

**Status:**

**In category:** \*

Search in the subcategories

**Not assigned to any product types:**

**Assigned to product types:**

**Note:** Hold Ctrl key to select multiple types.

Use the provided search form to specify the parameters relevant to your search. The product number and title can be copied or typed in manually into the corresponding fields. Product status can be specified by selecting the necessary value from the drop-down list (*All products, Configurable only, Bundled only*). Another drop-down can be used to specify the category in which you would like the search to be conducted

(Selecting *All* means that all the categories will be searched). If you want to search in subcategories, select the corresponding check box. If you want to search only for products not assigned to any product types, select the Not assigned to any product types box. If you know that the product is assigned to a particular product type or several types, you should select the appropriate product type from the *Assigned to product types* box. To select multiple types press and hold Ctrl key while selecting the appropriate types with your mouse. To unselect a product type hold Ctrl key and click on the type that you would like to unselect. To initiate the search, click on the **Search** button.

Search results are displayed in the 'Search results' section below the search form.

Search results				
	ID	Product	Status	Assigned types
<input type="checkbox"/>	#16135	<a href="#">Motorola M3682</a>	<b>Configurable</b>	
Details Clone Delete selected Modify selected Export selected				

For each of the found products the 'Search results' section outputs the found product ID and title. If a product is configurable or bundled, it will be shown in the Status column. Assigned types column displays information regarding how many product types the product is assigned to. Paging is provided for more convenient navigation in cases when the list of results delivered by the search engine is too long. You can define the number of products per page and the maximum number of navigation pages through the Administration menu of the Admin zone (General Settings/Appearance Options).

### 3.7.1 Operating search results

#### To view the details of a product:

- 1) Select the radio button of the desired product, then click on the **Details** button, or
- 2) Click on the product title link

#### To modify the details of a product:

- 1) (for all products) Select the radio button of the desired product, then click on the **Modify** button
- 2) (for bundled products) Click on the *Bundled* link of the product

#### To clone a product:

Select the radio button of the desired product, then click on the **Clone** button.

Cloning a product creates an exact copy of the product in the database (a new product with all the options of the initial product). You can modify the details of the 'clone' product and save the changes. It is a very convenient way of creating similar products.

#### To delete a product:

Select the radio button of the desired product, then click on the **Delete** button (you will need to confirm the to deletion).

#### To change Configuration Wizard settings for a configurable product:

Click on the *Configurable* link.

## 3.8 Modifying configurable products info

You can modify the details of your configurable products to keep your store up to date. Furthermore, you can add options to configurable products such as detailed images, international descriptions, reviews, etc.

This chapter explains how to:

- modify the details of a configurable product
- add and remove international descriptions
- add and remove product options
- add and remove up-selling links
- add and remove detailed images
- edit reviews

### 3.8.1 Modifying the details of a configurable product

1. Search for the product you would like to modify.
2. In the Search results select the check box of the desired product, then click on the **Modify selected** button. Product details page will be opened.
3. Change the product details you want and click on **Save**.

#### 3.8.1.1 Adding and removing international descriptions

You can add product descriptions in other languages, for example if your product is intended for a certain market.

1. Open the International descriptions section of Product Management page.

### International descriptions

Language:

Product title:

Search keywords:

Short description:

Detailed description:

2. Choose a language from the drop-down list.
3. Enter the product title, search keywords, the short and detailed descriptions in the text fields.
4. Click on **Apply**.
5. Repeat steps 2-4 to add descriptions in other languages.

If you want to delete a description, click on **Delete** on the page of the description you want to delete. To delete international description in the current language for all the products being edited, select the corresponding check box and click **Delete**.



## 3.8.1.2 Adding and removing product options

You can set additional options for a product if you want your customer to choose color, size, packing, etc. You can list options in the Options list for your customer to choose, or let the customer type in the appropriate information himself.

1. In the 'Product Management' section menu, click the link 'Product Options'. This opens the section of your store that allows you to define and edit product options for the product being viewed/modified.

### Add option group

**Option group name:** \*   
Each option group must have a unique name

**Option text:** \*   
This text will be displayed on the customer's frontend

**Option group type:**

**OrderBy:**

**Availability:**

**Options list:**  
Leave it empty if you chose 'Custom text field' as an option group type  
Example:  
Red=-4%  
Blue=+5  
Brown

2. Enter the name of the option group in the 'Option group name' field.
3. Enter the option description for your customers in the Option text field.
4. Select option group type.
5. Enter a numeric value defining the position of the option group field relative to the other option group fields that will be displayed on the same 'Product details' page in the OrderBy field.

6. Select the Availability check box to make the option group field visible in the Customer zone and enable your customers to select option values from this group. Unselect the check box to hide the option group field from the Customer zone.

7. Do one of the following:

- Enter the options in the Option list field, or
- Leave the Option list empty. In this case the customer will be able to type custom information into the text field that appears on the customer front end.

8. Click on **Add option group**.

If selecting different options should affect the price of the product, the symbols "=", "+" or "-" can be used in the Options list. Also you can use "%".

*Example:*

Check all / Uncheck all						
	#	Option class	Option type	OrderBy	Availability	Options list
<input type="checkbox"/>	444	Color	Price modifier	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	Red -4.00 % Blue 5.00 \$ Brown
<input type="checkbox"/>	445	Size	Price modifier	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	S M L XL

In this example if a customer chooses the red color, the price of the product will be discounted by 4%. Reversely, there will be a \$5 mark-up if he chooses blue.

If any of the product options or option combinations is not available, you can define it by using Exceptions.

*Example:*

Options combination	
<input type="checkbox"/>	Color: Blue    Size: XL

This exception means that a customer will not be able to order a product that has blue color and size XL

(although he will be able to order this product of other sizes in blue).

If a customer attempts to select an unavailable combination of options, a warning message will be displayed:

**Options**

Color Blue(+\$5.00) ▾

Size XL ▾

Sorry, this combination of product options is not available.

If you want a more substantial message to be displayed to your customers, you can use Product options validation section to create a JavaScript notification.

*Example:*

If you have the Product options set up like this:

Check all / Uncheck all						
#	Option class	Option type	OrderBy	Availability	Options list	
<input type="checkbox"/>	444 Color	Price modifier	1	<input checked="" type="checkbox"/>	Red 5.00 % Green 5.00 % Blue	

and add Red and Blue as exceptions:

Options combination	
<input type="checkbox"/>	Color: Red
<input type="checkbox"/>	Color: Blue

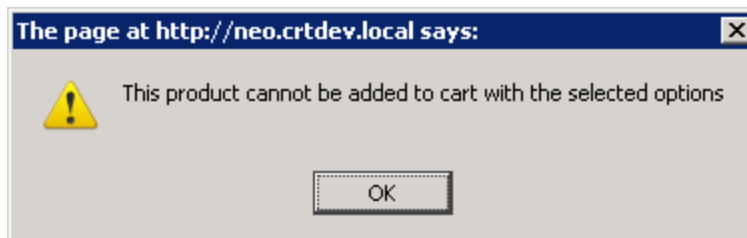
and enter the following code into the 'Validation script' section:

**Validation script (Javascript)**

Below you can write a client-side Javascript code that will be launched when a customer decides to add a product to cart and starts selecting options with which the product should be added. This script will validate the selection of options and warn the customer if the selected option combination is unavailable without page reloading. You need to have skills in Javascript programming to avoid errors on the customer frontend.

```
if (product_option('Color').selectedIndex == 0 ||
product_option('Color').selectedIndex == 2 { alert('This
product cannot be added to cart with the selected
options');
return false;
}
else
return true;
```

the following message will be displayed when a customer chooses red or blue color:



**Note.** Please carefully follow the example to avoid JavaScript errors on the storefront.

To delete an option or an exception, click on **Delete** next to the option or the exception you want to delete.

### 3.8.1.3 Adding and removing up-selling links

You can link a product with other products and suggest that your customers view similar products in your store. Up-selling links will be listed when the customer views product details page.

1. In the 'Product Management' section menu, click the link 'Upselling links':

Pos.	Product ID	SKU	Product
No products			

**Add new link**

Product:

Bidirectional link

2. Click on **Browse**, the Select product window will be opened.
3. Choose a category and click on **Show products**. All the products of the chosen category will be displayed.
4. Choose a product from the list and click on **Select**.
5. Select the 'Bidirectional link' option to include upselling links on product details pages for both products.
6. Click on **Add/Update**.
7. Repeat steps 3-6 to add more links.

To remove a link, select the check box next to it and click **Delete selected**.

#### 3.8.1.4 Adding and removing detailed images

You can add detailed product images to present it better in the Product Detailed View. Images will be shown under the product description and options.

1. In the 'Product Management' section menu, click the link 'Detailed images':

### Detailed images

Image	Pos.	Availability	Alternative text	Image properties
No images				

**Add new detailed image**

**Preview:** 

Select a file:

Alternative text

2. Click on **Browse**, the Select file window will appear.
3. Select the image from the Image selection dialog and click on **Apply**.
4. After the product page reloads enter the alternative text in the text field.
5. Click **Upload**.
6. Repeat steps 3-6 to add more images.

If you want to remove an image, select the check box next to it and click **Delete selected**.

#### 3.8.1.5 Editing reviews

You can edit or delete customer reviews to prevent abuse.

1. Go to the 'Customer reviews' section of your store's administration back-end (Product Management -> Customer reviews).

### Edit reviews

Check all / Uncheck all

	Author	Message
<input type="checkbox"/>	Happy customer	Review text

**Add new review**

---

2. Edit the text in the 'Message' field.
3. Click on **Add/Update**.

If you want to delete a review, place a check mark in the check box next to this review and click on **Delete selected**.

## 3.9 Managing the Configuration Wizard

After a new configurable product has been added to your store, you will need to create the necessary Configuration Wizard steps for your customers to be able to configure it. To configure the wizard steps for a product go to Configuration Wizard Management page (The same page is used to make changes to the already existing configuration steps).

### Configuration wizard management

[Modify product details](#) >

**Add new step**

---

Step name:

To access Configuration Wizard Management page do one of the following:

- 1) Search for the necessary configurable product, click on the *Configurable* link next to it in the Search results section.
- 2) Being on the configurable product Modify Product page, click *Manage Configuration Wizard* link (it appears in Product Configurator menu when you are working with the details of a particular configurable product).

To begin with, enter the names for the Configuration Wizard steps through the Add new step form. For each of the steps type the step name into the appropriate field, then click on Add step button. The added step names will be displayed above the Add new step section in the Wizard steps list.

### Configuration wizard management

[Modify product details](#) >

---

#### Wizard steps

Pos.	Step
<input type="checkbox"/> 0	<b>Step 1: The mobile phone for a gift will be...</b>
<input type="checkbox"/> 0	Step 2: Mobile personalization

**Note:** To delete items please tick the appropriate checkboxes.

---

#### Add new step

Step name:

If needed, you can change the order of the Wizard steps: specify the position for each step by entering the position number for it and click on **Update**. The greater the step position number is, the closer to the end of the Configuration Wizard the step will be. To delete a step select the check box corresponding to this step and click on Delete selected button.

As soon as you add the name for the first step, Wizard: Step 1 details section will be displayed below.



### Wizard: Step 1 details

#### Step 1: The mobile phone for a gift will be...

Current language:

If you need to edit text in another language, please make sure this language is selected as current.

Step name:

Step description:

OrderBy:

#### Add new slot

Slot name:

To edit the details of some other step, click on the step name link in the Wizard steps list.

The Step details section enables you to edit the name, the description and the position number of the step and to add slots to it. First, select a language to be used as current from the drop-down list. To change the step name and description, enter the desired text into the appropriate fields and click on **Update**. To change the position number of the step enter the new number into Order by field and click on **Update**. New slots can be added to the step through Add new slot section. To add a slot type the slot name into the appropriate field, then click on **Add slot** button. The added slot names will be displayed above the Add new slot section in the Slots list. You can change the order of the slots: specify the position for each slot by entering the position number for it and click on **Update**. The greater the slot position number is, the closer to the end of the Configuration Wizard step the slot will be. To delete a slot select the check box corresponding to this slot and click on **Delete selected** button. For each of the slots you should specify the slot status. Choose *Optional*, *Mandatory* or *Disabled* from the drop-down list.

**Wizard: Step 1 details**

**Step 1: The mobile phone for a gift will be...**

Current language:

If you need to edit text in another language, please make sure this language is selected as current.

Step name:

Step description:

OrderBy:

---

**Slots**

	Pos.	Slot name	Status
<input type="checkbox"/>	<input type="text" value="5"/>	<a href="#">Mobile model</a>	<input type="text" value="Mandatory"/>
<input type="checkbox"/>	<input type="text" value="10"/>	<a href="#">Additional battery</a>	<input type="text" value="Optional"/>
<input type="checkbox"/>	<input type="text" value="15"/>	<a href="#">Additional charger</a>	<input type="text" value="Optional"/>

**Note:** To configure a slot click on the slot name link.

---

**Add new slot**

Slot name:

To configure a slot click on the slot name link. The section you will be transferred to makes it possible to edit the details of the chosen slot (the slot name, description, status, position number), to move the slot to another step, to make slot rules and to define price modifiers for the slot. First, select a language to be used as current from the drop-down list. To change the slot name and description, enter the desired text into the appropriate fields and click on **Update**. To change the position number of the slot enter the new number into Order by field and click on **Update**. To move the slot to some other step, select the name of the desired destination step from the drop-down list and click on **Update**.

[Step 1 details](#) >

---

### Slot details

**Current language:**

If you need to edit text in another language, please make sure this language is selected as current.

Slot name:

Slot description:

Status:

Order by:

Move to the other step:

Slot rules section enables you to establish slot rules. That is to define the products of which product types can fit in this slot. To add a rule, select the allowable product type name from the list, then click on **Add rule**. More than one product type can be made allowable. To select multiple types press and hold Ctrl key while selecting. To delete a rule select the check box next to it, then click on **Delete selected** button.

**Slot rules**

---

This slot can contain the following product types:

1. Mobile phone

**Note:** To delete items please tick the appropriate checkboxes.

Add allowable product type(s) for this slot:

Cases  
CD&DVD drivers  
CPU Coolers  
Keyboards  
Memory chips  
Mices  
Mobile Antenna Boos  
Mobile Battery

**Note:** Hold Ctrl key to select multiple types.

Price modifiers section enables you to define price modifiers for the slot. Price modifiers can be applied if you want to change in some way the price of a product that will be placed in this slot. For example, you might want a discount or a mark-up to be applied. Positive value should be used for mark-up, negative value – for discount. To set a price modifier first enter its value into the appropriate field. Choose from the drop-down list if the value should be measured in percent or be absolute. Select the membership level to which the price modifier should be applied by choosing it from the drop-down list. Click on **Add/Update** button. To delete a price modifier select the check box next to it, then click on **Delete selected** button.

### Price modifiers

Here you can define price modifiers for this slot. Positive value should be used for mark-up, negative value - for discount.

V	Value	Type	Membership
<input type="checkbox"/>	<input type="text" value="3.00"/>	<input type="text" value="Percent (%)"/>	<input type="text" value="All"/>

**Note:** To delete items please tick the appropriate checkboxes.

Delete selected

Add new modifier:

<input type="text"/>	<input type="text" value="Percent (%)"/>	<input type="text" value="All"/>
----------------------	--	----------------------------------

Add/Update

## 4 Ordering Configurable Products (Customer zone)

### Using the Configuration Wizard

When a configurable product is selected by a customer, the customer is prompted to configure it.




Product Configuration Wizard is launched. It enables the customer to select what components his final complex product should consist of.

In the Configuration Wizard the components of the final product should be placed in the appropriate slots of the configurable product. Each slot involves a selection of product components of a specific type. Slots can be mandatory or optional. Mandatory slots are marked by the "Required" sign. All the mandatory slots at each Configuration Wizard step must be filled before the customer can go to the next step (**Continue** button does not appear until all the "Required" slots are filled). Optional slots can be filled or left blank.

Configuration Wizard presents a configurable product in the form of a vertical table. The row titles are slot names. The customer's task is to choose the components he wants and place them in the appropriate slot cells.

### My mobile phone: Step 1



**Step 1: The mobile phone for a gift will be...**  
At this step you choose the desired model

**Mobile model (required)**

▷ [Select](#)

**Additional battery**

▷ [Select](#)

**Additional charger**

▷ [Select](#)

Before the component is placed in a cell, a **Select** button is displayed in it. Clicking on it displays the list of products (in the ordinary X-cart format) which can fit in this slot.

The customer is supposed to choose a product from the list and click **Add to configuration** button.



After adding the product component to the configuration the customer returns to the Configuration Wizard table. The name, the thumbnail picture and the price of the selected component appear in the slot cell. The **Select** button is removed, two new buttons – **Change** and **Delete** – appear in the lower part of the cell. These can be used to change the component or to remove it from the cell.

### My mobile phone: Step 1

**Step 1: The mobile phone for a gift will be...**

At this step you choose the desired model

**Mobile model (required)**



**Motorola M3682**  
**Our price: \$150.00**  
(€130.50)

**X [Delete item](#) [Change](#)**

**Additional battery**

▷ [Select](#)

**Additional charger**

▷ [Select](#)

[Continue](#)


Now the customer can proceed with selecting product components for the other slots. The combinability of the component selected affects the choice of product components offered by the Configuration Wizard for the other slots.

As soon as the desired product configuration is selected, the Configuration Wizard outputs the summary page. This page displays the whole list of product components selected with the help of the Configuration Wizard. The list is grouped according to the Configuration Wizard steps. For each slot you can see the name of the product placed in it, the product thumbnail picture and price. Total product cost is displayed below the components list.





### My mobile phone: Summary


**Summary:**



The mobile phone for a gift will be... (slot 1) [Modify](#)

 **Mobile model:** [Motorola M3682](#)  
**Price:** **\$150.00** (€130.50)

 **Additional battery:** [M3682 battery](#)  
**Price:** **\$13.99** (€12.17)

 **Additional charger:** n/a

**Total products cost: \$163.99**

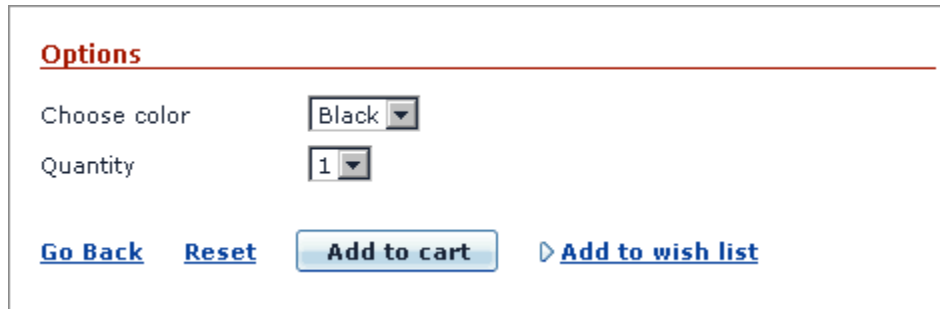
#### Options

Quantity

[Go Back](#) [Reset](#)  [Add to wish list](#)

By clicking on the product name link you can view the details of a product component (product details will be displayed in a new window in the ordinary X-Cart format). If you would like to return to a particular Configuration Wizard step and select another product for a slot, click on the *[Modify]* link next to the name of this step.

Options section allows you to specify how many configurable products of this kind you would like to order, and to define the values of other product options if any.



**Options**

Choose color

Quantity

[Go Back](#) [Reset](#)  [▶ Add to wish list](#)

Product Configurator automatically counts the maximum number of complex products of the chosen configuration that can be ordered. A warning below the quantity field tells you how many products you will be able to order at the most. If, all the same, you will attempt to order a quantity of the product exceeding the quantity available, an error message will be displayed.

At the bottom of the summary page there are three buttons. Clicking on the **Go back** button takes you back to the previous Configuration Wizard step. **Reset** button discards the selected configuration, allowing you to go through all the steps of the Configuration Wizard again from the very beginning. **Add to cart** button adds the configured product to cart.

The configured product is placed in the shopping cart as one object. By clicking the **Reconfigure** button the customer can go back to Configuration Wizard and reconfigure the product.

**X-Configurator add-on module for X-Cart 4.2.2. User manual.**

© 2009 Ruslan R. Fazliev. All rights reserved.

Printed: 30.06.2009