



Product advisor

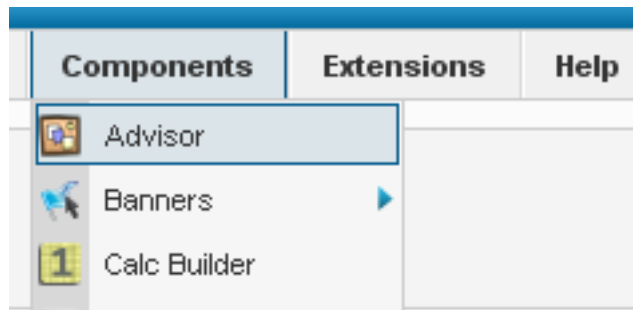
Quick Guide v0.2.3

In this quick step guide we are going to follow basic steps to create a full-operating flow. We'll create the Bike advisor flow example.

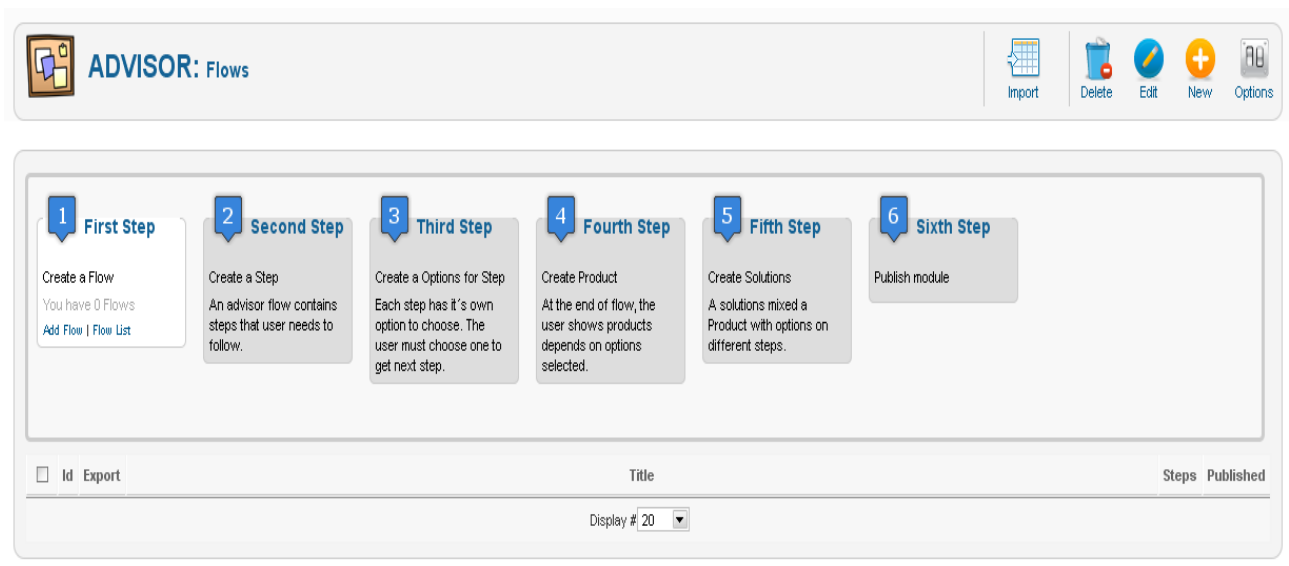
First of all we install component and module.

1. Advisor Menu

Advisor has only one menu link



Click in menu link and you will enter the step chart to create a flow with questions, options and solutions.



Joomla! 2.5.3

First step: Create a flow.

The interface displays a six-step process for creating a flow:

- 1 First Step**: Create a Flow. You have 1 Flows. [Add Flow](#) | [Flow List](#)
- 2 Second Step**: Create a Step. An advisor flow contains steps that user needs to follow. You have 0 Steps in Bike advisor Flow. [Add Step](#) | [Step List](#)
- 3 Third Step**: Create a Options for Step. Each step has it's own option to choose. The user must choose one to get next step.
- 4 Fourth Step**: Create Product. At the end of flow, the user shows products depends on options selected. You have 0 Products in Bike advisor Flow. [Add Product](#) | [Product List](#)
- 5 Fifth Step**: Create Solutions. A solutions mixed a Product with options on different steps. You have 0 Solutions in Bike advisor Flow. [Add Solution](#) | [Solution List](#)
- 6 Sixth Step**: Publish module

Configuration form for 'Bike advisor':

- Title**: Bike advisor
- Published**: Yes
- View Resume**: Yes
- View PDF Export**: Yes
- Frontend RESULTS Layout**:
 - Columns arrangement: 1 Column, 2 Columns, 3 Columns, 4 Columns (4 Columns selected)
 - Global Container width: 100% (Ex. 100% or 450px)
- Frontend STEPS Layout**:
 - Columns arrangement: 1 Column, 2 Columns, 3 Columns, 4 Columns (4 Columns selected)
 - Global Container width: 100% (Ex. 100% or 450px)
- Global Container preferences**:
 - Resume width: 25% (Ex. 100% or 450px)
 - Container height: 300 (Ex. 100% or 450px)
- Text Editor**:
 - Rich text editor with toolbar (Bold, Italic, Underline, ABC, Styles, Paragraph, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Video, HTML).
 - Content: Welcome to the bike advisor!!!!
Follow three simple steps and the advisor will guide you through our catalog.
Please click start button when you're ready.

Each flow is a full advisor with its questions, options and solutions. In order to create a flow you must configure the title, publish parameters, front page of the advisor, and the layout to show the options and the results. You can choose the number of columns and the width of the container for both layouts. You can also add a header and footer sections to the pdf export. We will name it 'Bike advisor' and create the front page with some introductory text.

Second step: Create the questions.

ADVISOR: Add / Edit Step

1 First Step

Create a Flow

You have 1 Flows

[Add Flow](#) | [Flow List](#)

2 Second Step

Create a Step

An advisor flow contains steps that user needs to follow.

You have 0 Steps in Bike advisor Flow

[Add Step](#) | [Step List](#)

3 Third Step

Create a Options for Step

Each step has it's own option to choose. The user must choose one to get next step.

4 Fourth Step

Create Product

At the end of flow, the user shows products depends on options selected.

You have 0 Products in Bike advisor Flow

[Add Product](#) | [Product List](#)

5 F

Create So

A solution Product w different s

You have

[Add Solution](#)

Name

Man/woman

B I U ABC | | Styles | Paragraph

HTML

Who are you? We have special products for women and men bikers!

Path: p

[Article](#) [Image](#) [Page Break](#) [Read More](#) [Toggle editor](#)

Prevoious step

Root

Root

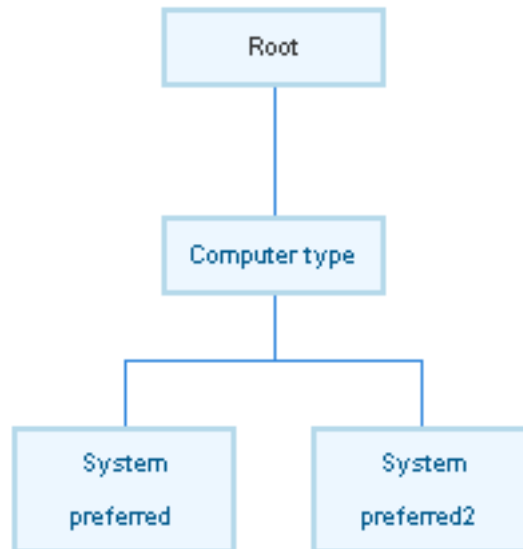
Man/woman

Id	Name	Text	Previous step
1	Man/woman	Who are you? We have special products for women and men bikers!	

Display # 20

The questions to ask the user are built using default html editor. Define the text and/or images for the question, a title, and select which of the questions (steps) is the previous one. This way you will create a 'path' of questions that will be presented in order to the user.

NEW! From version 0.2.1, you have available a new parameter for the step 'Precondition'. Place here any value of a previous option, and the flow will follow this path when that option is selected. It will follow according values or steps without precondition otherwise. Using this feature you can create dynamic flows with questions depending on previous answers, each path with different levels of questions before reaching the final results.



For our example we are going to create three questions (Gender, type of bicycle, and extra options) in order to get the advisor select which products are more suitable for the user.

Third step: Create the possible answers for each question

The screenshot displays the Moonsoft Advisor interface. At the top, there are four numbered steps: 1. First Step (Create a Flow), 2. Second Step (Create a Step), 3. Third Step (Create a Options for Step), and 4. Fourth Step (Create Product). The 'Third Step' is currently active. Below the steps, there is a 'Description' field with the text 'Man' and a 'Content' field containing a blue square icon with a white male symbol and the word 'Man'. The interface also includes a rich text editor toolbar, a 'Path' field showing 'p » img', and several action buttons: 'Article', 'Image', 'Page Break', 'Read More', and 'Toggle editor'. A 'Value' field is located at the bottom left.

Each option has a description, a free content, and a value. The values will be used when building the solutions for the flow. Enter each question and add new options to choose from. We'll create two options for the question gender (male/female), 4 options for the question 'type of bicycle', and 4 more options for the last question, in order to choose filtered items)

Fourth step: Create products.

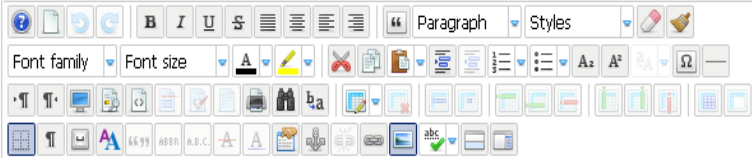

The interface displays a sequence of six steps for configuring an advisor flow. Step 4, 'Create Product', is the current focus. Below the steps, a table lists the products created:

<input type="checkbox"/>	Id	Title	Order
<input type="checkbox"/>	1	BIKE 1	
<input type="checkbox"/>	3	BIKE 3	

Now you must create all possible results for your flow. Each 'product' or result has free content, you can place here links to different parts of your site, images...anything you could build with your html editor.

NEW!: If you have already created your products using joomla articles, HikaShop or Virtuemart components, you can skip this configuration step, and create your solutions using your existing content.

1 First Step Create a Flow You have 1 Flows Add Flow Flow List	2 Second Step Create a Step An advisor flow contains steps that user needs to follow. You have 3 Steps in Bike advisor Flow Add Step Step List	3 Third Step Create a Options for Step Each step has it's own option to choose. The user must choose one to get next step.	4 Fourth Step Create Product At the end of flow, the user shows products depends on options selected. You have 13 Products in Bike advisor Flow Add Product Product List	5 Fifth Step Create Solutions A solutions mixed a Product with options on different steps. You have 20 Solutions in Bike advisor Flow Add Solution Solution List
------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Id	1
Title	BIKE 1
Content	<p>[Toggle Editor]</p>  <p>Static bike, model 1.</p>  <ul style="list-style-type: none">• Specs line1• Specs line2• Price: 0,00 € <p>Path: p » img</p> <p>Article Image Page Break Read More</p>

We'll create a set of bicycles of different types, and we'll attach the products to the path of options followed by the user in the next step.

Fifth step: Solutions. A solution is built with a condition, and a result. So, you can define product 1 will be shown as result if user answered option 1 to the first question AND option 3 to the second one....OR if answered option1 to the last question, regardless of the other answers.

NEW! You can select as solution any custom product created using advisor configuration, or any existing product from a Joomla article, HikaShop or Virtuemart.

Product

-- Select Advisor Product --

-- Select HikaShop Product --

-- Select VirtueMart Product --

<input type="checkbox"/>	Id	Product	Steps		
<input type="checkbox"/>	1	BIKE 1	Bike type Static	Filter Voted	Man/woman
<input type="checkbox"/>	4	BIKE 1	Bike type Static	Filter All	Man/woman

Conditions that have to match at the same time should be grouped at the same solution rule, for ex:

BIKE1 will be shown if answer1 is 1 AND answer2 is 2 AND answer3 is 3...

if you want to define alternate conditions for this product, you will define another solution rule for the same product, so these two rules:

BIKE1 will be shown if answer1 is 1 AND answer2 is 2 AND answer3 is 3.

BIKE1 will be shown if answer3 is 4

define that if answer3 is 4, bike 1 will also be shown as result, because it matches rule 2.

Once you have all products and solutions configured, you can publish your module.

The module will ask you to configure standard parameters, to get the advisor placed at a specific position of your template, or write any custom position, which you could place inside an article using {loadposition xxx} function.

You only need to select which flow should execute the module, and you're done.

The advisor shows the front page of the flow, and a button to start the questions.

Advisor


RESTART

INTRO

Start >

Resume

 Welcome to the bike advisor!!!!

 Follow three simple steps and the advisor will guide you through our catalog.

 Please click start button when you're ready.


First question-two options

Advisor

RESTART

INTRO 1 Man/woman

Resume

 **Who are you? We have special products for women and men bikers!**



Second question-4 options

Advisor

RESTART

- INTRO
- 1 Man/woman
- 2 Bike type

? **Great! Now choose the activity you'll do with your new bike**

Resume
Man/woman
Man

Mountain Bike

For off-road cycling. This activity includes traversing of rocks and washouts, and steep declines, on dirt trails, logging roads, and other unpaved environments

Road Bike

Choose this category if you like traveling at speed on paved roads

Track Bike

Only one gear and no brakes. Optimized for racing at a velodrome

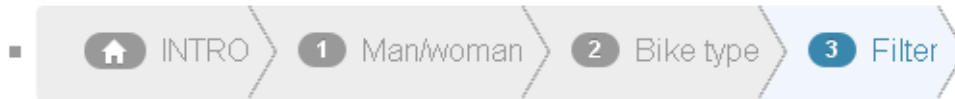
Stationary Bike

Practice your favourite sport at home, for exercise, to increase general fitness, and for training for cycle events

Third question-4 options

Advisor

RESTART



? Any other filter to the products?

- Resume
- Man/woman
- Man
- Bike type
- Road

A yellow card with a folder icon in the top left. The text reads 'Show me all!' followed by 'Full catalog for your specs.' with an icon of a document.

A yellow card with a ribbon icon in the top left. The text reads 'Top sales' followed by 'More purchased items during last month' with an icon of bicycles.

A yellow card with a star icon in the top left. The text reads 'Customers choice' followed by 'Top rated bikes selected by our web customers' with an icon of a starburst.

A yellow card with a magnifying glass icon in the top left. The text reads 'Bargains' followed by 'Search special offers available now' with an icon of a lightbulb.

The resume will show previous responses to the questions. When all questions are finished, advisor will search which products match the rules according to the responses given, and it will show the results.

Advisor

RESTART

INTRO 1 Man/woman 2 Bike type 3 Filter End

Products according to your selections



Road bike, model 4.

- Specs line1
- Specs line2
- Price: 0,00 €



Road bike, model 5.

- Specs line1
- Specs line2
- Price: 0,00 €

Resume

Man/woman

Man

Bike type

Road

Filter

All

If you have selected for your solutions either hika shop or virtuemart products, you will also see an 'add to cart' button for hika shop and a button to access full specs for virtuemart and continue your shop checkout.

Advisor

[RESTART](#)

■ [INTRO](#) **1** Computer type [End](#) [PDF](#)

Products according to your selections

Hika Product


\$50.00 each



1 [+](#) [-](#) [Add to cart](#)

This is a hika shop product.

Virtuetest



Product short description

Price:
Sales price: 5,00 €
Sales price without tax: 5,00 €

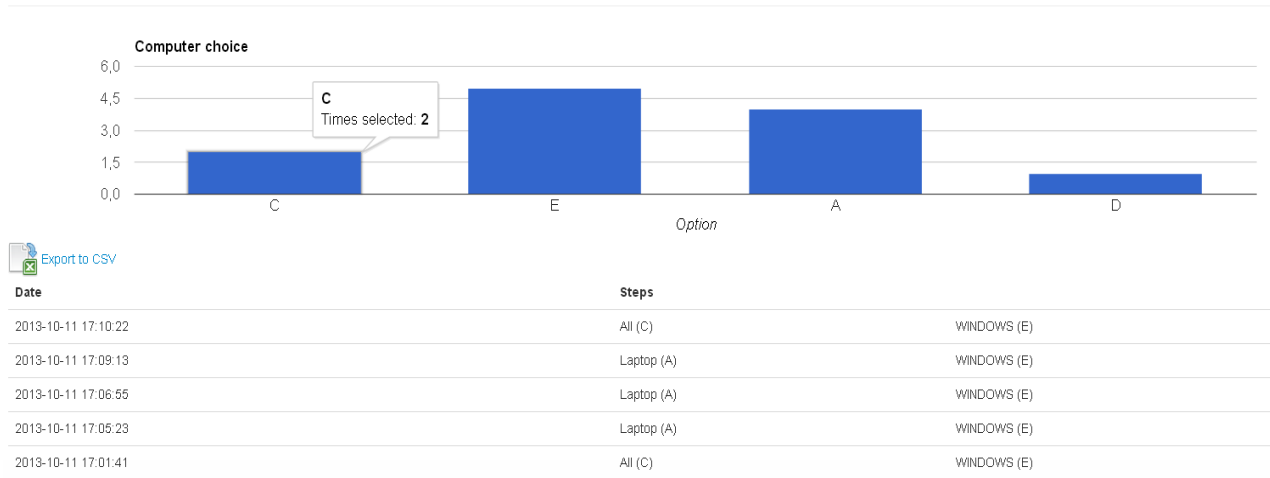
[View](#)

User will have available a pdf export link in order to keep advisor results in a file.

Tracking user input

Selecting 'Stats log' option from your backend, you will be able to check a bar graph showing number of times each option is selected, and also a log with all user inputs that will show you the paths followed by your users. You have available an option to export these data to a csv file that can allow you to build your own reports.

Computer choice



Enjoy Advisor

Moonsoft