wizAdvisor™

WizAdvisor Manual
Release 3.01

For the most updated version of this manual …

… please go to:
www.wizadvisor.com/downloads/wamanual.pdf

…or to the Demo Download Section:
http://wizadvisor.com/demodownload/demodownload.html

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1 Introduction

Thank you for choosing the WizAdvisor to provide an excellent consulting and selection support for your customers and clients. The WizAdvisor will help your customers to find the best choice from your offerings.

We recommend the following order to start with the WizAdvisor:

1. Try our full featured demo to checkout changes in settings try different settings to learn about the tool. Use the manual to learn more.
2. Think about your users what they could be looking for.
3. Set up an initial set of questions.
4. Add your products to the WizAdvisor. For testing needs, you can enter about a dozen and add more products later on when your set of question is mature.
5. Start with an initial configuration and use the tuning tool and frontend testing to check the outcome of your settings.
6. Fine tune your setup by altering questions and configuration.
7. (If needed: insert localized content)
8. Update the layout
9. Set it live

For any questions/improvements regarding the WizAdvisor please write to us at: contact@wizadvisor.com

The WizAdvisor Team

1.1 Some general notes about using the tool

The WizAdvisor is flexible to accommodate many usage cases and consulting needs. Nevertheless, the semantic of questions is always unique. As it is easy to update the tool, you can test various approaches until the result satisfies you.

Avoid to think in concepts of “decision trees”. The WizAdvisor is not working this way: our method is more flexible, easier to handle, and provides better service to the users. Set up your questions like a good sales person / consultant would ask them (and the appropriate answer options). And then configure the products for each answer option. You will see – the dynamic dialogue function of the WizAdvisor will work it out. In principle, all questions are ready to be asked in a linear way.

When we say “products”, we refer as well to services or other items which you offer. The “product” is always the result of the consulting process – one or more “products” will be displayed as result. This could also be a service like a holiday arrangement, or a piece of information like a personality-profile.

As the WizAdvisor is prepared for multi-language / multi-country usage (Enterprise version), we recommend to make updates, enhancements and deletions always in the first language (language ID 1). You receive the software with “English” as first language. If you want to have this i.e. in German, just change the name of the language from “English” to “German”, and enter your German content where previously the “English” one was.

Some content elements are used in more than one area – check on the frontend if the length and meaning of the content matches with all usages. This refers in specific to product information.

In the WizAdvisor backend, there are many help text and descriptions to tell you how to use the respective section. Together with the demo content (mobile phone demo) this will help to make a start without the need to read the full manual first. For setup of questions and product configuration, we recommend that you study the manual for fast results.

To navigate in the backend, breadcrumbs help to go back fast.

When you are working in the backend (content management system), remember that you are working online. Save your entries regularly, as any disconnection may result in loss of entries.

2 Installation

WizAdvisor needs a Webserver+PHP+SQL. The installer will check if the settings are correct.
However, this installation guide does not treat the installation of a webserver.
If you do not have a webserver, please refer to the links below. We recommend to create a new blank MySQL database before the installation of the WizAdvisor, alternatively you can use an existing MySql database.
Please make sure that you know your database log in info: hostname, username, password and name of the database.
You are requested to enter those informations during the installation.
Please take a look at the system requirements further down below.

2.1 Linux Installation:

1) Copy the directory /wizadvisor from the downloaded *.tar.gz or *.zip file into your webserver directory (eg: /srv/www/htdocs/wizadvisor)

2) Please make sure that you have read-,write- and execution rights for the following files and directories:

* Connections/pst.php
* Connections/KT_db.php
* Connections/KT_frontend_db.php
* tinymce/init.js
* inymce/plugins/ibrowser/config/config.inc.php
* img/Mid_High_resolution/product/
* img/Low_resolution/product/
* pdf/product/
* img/top2.gif
* img/top.gif

To set the rights you can use eg. these commands:

```
cd /../htdocs/wizadvisor
chmod -R 777 Connections/ tinymce/init.js \
tinymce/plugins/ibrowser/config/config.inc.php \
img/Mid_High_resolution/product/ img/Low_resolution/product/ \
pdf/product/ img/top2.gif img/top.gif
```

After the installation is completed only the directories for the upload of pictures and documents need write rights.

3) Open http://yourdomain.com/wizadvisor/install/index.php in your browser and follow the instructions of the installation script. If the webserver runs on your local machine you can use the URL: http://localhost/wizadvisor/install/index.php.

4) If not already done, request a licence file from website
Starter Version: http://www.wizadvisor.com/en/demodownload/license-request.html
Professional version: http://wizadvisor.com/en/nc/demodownload/license-request.html?tx_wademolicense_pi1[version]=pro
You will also find the link in the installer.

5) Place the file in the main directory /.../htdocs/wizadvisor/licence.txt

IMPORTANT: After the installation. Due to security reasons delete all files in the install/ directory.

2.2 Windows Installation:

You need administration rights for installation.
Note: If you use the Apache Webserver the installation is equal to linux.

1) Copy the directory /wizadvisor from the downloaded *.tar.gz or *.zip file into your webserver directory

For the IIS Webserver use the directory
SBS => eg. c:\Inetput\wwwroot\wizadvisor

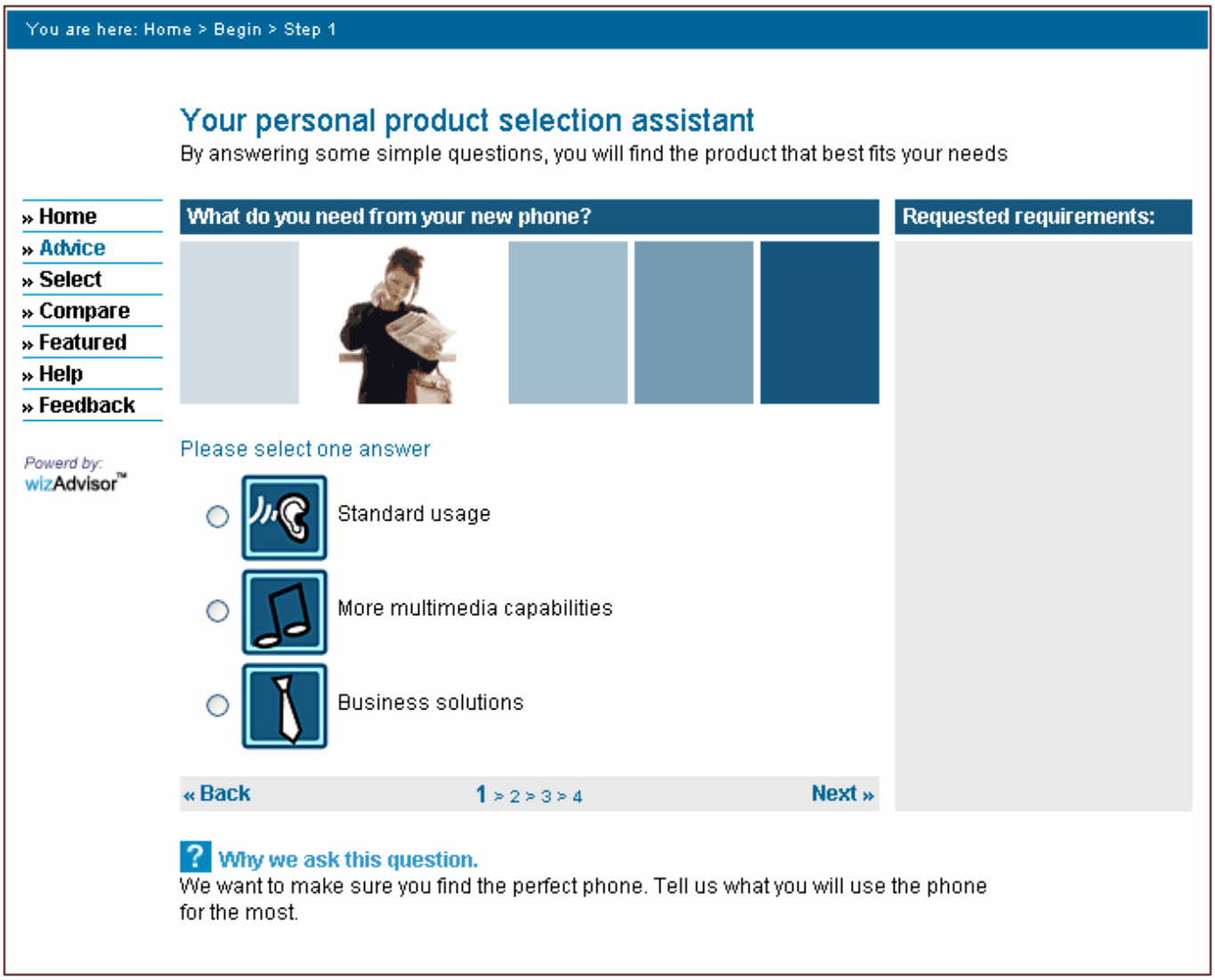
2) Open http://yourdomain.com/wizadvisor/install/index.php in your browser and follow the instructions of the installation script. If the webserver runs on your local machine you can use the
URL: http://localhost/wizadvisor/install/index.php.

3) If not already done, request a licence file from our website
Starter Version: http://www.wizadvisor.com/en/demodownload/license-request.html
Proffossional version: http://wizadvisor.com/en/nc/demodownload/license-request.html?tx_wademolicense_pi1[version]=pro
You will also find the link in the installer.

5) Place the file in the main directory c:\Inetput\wwwroot\wizadvisor\licence.txt

IMPORTANT: After the installation. Due to security reasons delete all files in the install/ directory.

3 Select by Usage - Wizard



3.1 Overview

The select by usage wizard asks users questions about intended usage or what users needs are. The questions asked are dynamic, based on previous inputs and the underlying product portfolio. After answering a series of questions the user is presented with up to three options for their ideal product. Results show products that suit the users usage needs most appropriately: the best fit for their need, the second best fit, and an alternative. This alternative can be used for up-selling or cross-selling purpose.

In this chapter you will learn how to:

- Write good questions
- Add / Edit / Remove / Sort select-by-usage questions
- Insert marketing messages
- Upload images and icon graphics

When entering questions into the tool you need to decide the following:

- Questions and Answer options
- Type and Order

3.2 How to set up a dialogue

The aim of the wizard and questions is to find the right product, service or solution for the user. When creating questions you would need to look at your product portfolio. Keep in mind that the selection analysis of the WizAdvisor is done within a given set of products or services. The question and answer dialogue should match the user's needs with your product portfolio. You should try to ask not more questions than necessary to reach this goal.

The first step is to make a list of all needs a shop assistant / consultant would ask for. Just imagine a typical dialogue with a customer in search for the best fitting product. Write down the questions posed, and all the possible answers a customer might give. This is what we call answering options.

This could be: Yes or No. Or: very important and less important. Or a single criteria ("A tool for beginners or experienced people? Beginner!"). Or many criteria ("Which colors you like? Red, Orange, …") .

As second step, list all the product features or service elements which fulfill these needs (answering options).

As a third step, check which of the features belong to each of your product offerings. Now you will see if there are products which fulfill the identical set of needs. If this is the case, you need further element to fully differentiate your portfolio. You achieve this when you list what additional features or service elements these products have, to find out which corresponding need is not yet covered in your questions list. Add those as additional questions or answering options to have your final list of questions.

- Writing style: Have a shop assistant / consultant in mind, what would he ask. What words would he use?
- Start with general questions, move on to more detailed ones.
- Bring the total number of questions + answering options in relation to your total number or products/services. The larger your portfolio is, the more questions it is suitable to ask.
- The power of the select-by-usage wizard is that you can ask for "soft facts" like needs and usage, related to the world of the client rather than to the world of the product. But you can also use this dialogue format to ask for hard facts: i.e. prices, or certain technical features. Or to mix questions for soft facts with questions for hard facts. Hard facts are typically asked when you can expect that clients generally can relate to them.
- Each answering option serves to qualify a user and differentiates the products within the portfolio how well they fit his needs. Use only questions which serve this need. I.e. when all mobile phones offer a radio, you do not need to ask for the need to listen to the radio.
- You may sometimes also add questions which do not have an affect on the choosing mechanism: when the dialog needs to offer a standard answer to move ahead. Or when you want to mix into the wizard a question just for marketing research needs.

3.3 Question order and dynamic questions

It is more consistent to a human dialogue when starting with the broader terms / aspects.

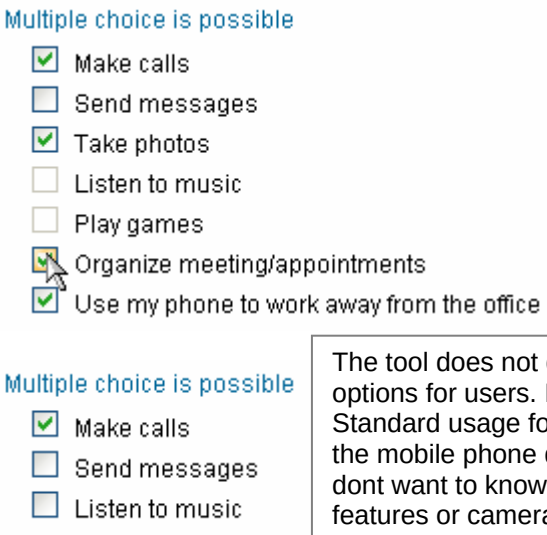
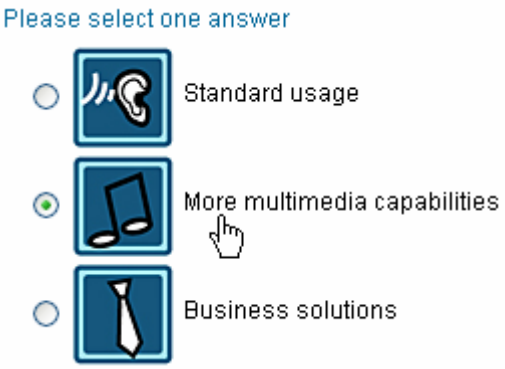
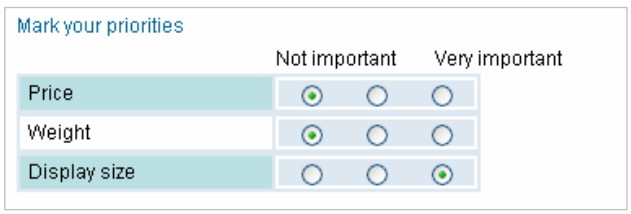
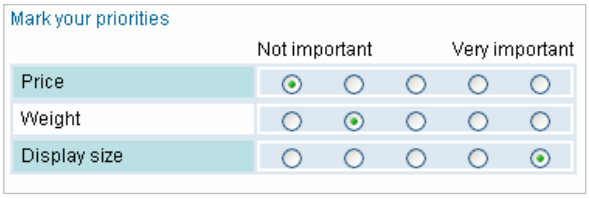
Also, answering options which are no longer relevant will not be displayed any more in the upcoming questions, or full questions will be skipped when no answering option makes sense any more (dynamic questions). As you can change the order of the questions at any time, you could set up the questions first, test it, and then decide on the order which works best.

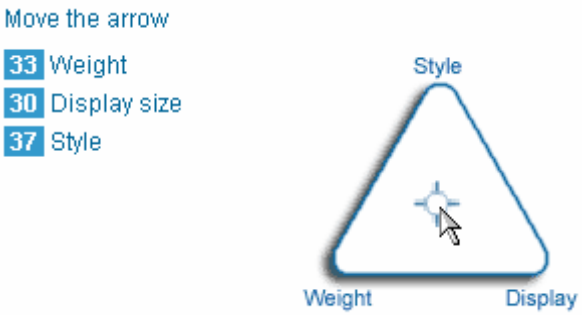
The live calculation in the answer dialogue (dynamic questions) will give the user a feeling of a question tree. You can design your wizard in a way that you intend to have your dialogue be split depending on certain starting questions. I.e. when you ask for wine or sparkling wine, a set of questions related to sparkling wine only, will not appear to those who have selected wine in the beginning. At the same time, a set of questions related to wine only, will not appear for those having selected sparkling wine.

3.4 Choosing the question type

The select-by-usage wizard offers 4 types of questions, to create a suitable dialogue. Choose a question type when you draft your questions and answering options. As you can always change the question type in the backend, you

could set it up with the intended version, test it (i.e. single choice or multiple choice), and when needed change it later on until you decide which works best.

Type	Description	Mobile phone demo example
Multiple choice	Multiple choice questions offer checkboxes, where the user can tick one or more options. All chosen options will be taken into account to find the best result for him. Live calculation within a question ensures that only possible combinations can be ticked. The user sees in the very moment when an option gets disenabled or enabled (avoiding frustrating cero-result lists at the end). Disenabled boxes are shown in grey only.	 The tool does not display irrelevant options for users. If the user selected Standard usage for question one (in the mobile phone demo) then they dont want to know about business features or cameras.
Single choice	With radio buttons, users can only choose one option. Enabling and disenabling of question are also working for radio buttons (Live calculation within the question). In this illustration you can see how images or icons can be used for question answers. You have the options of added either: just text, just images, or both as shown here. You will also notice that images and text are both clickable and allow users to choose options much easier. **Note:** Images can be used for both single choice and multiple choice answers but not for scale or triangle questions.	
Scale	A scale of either 1-3 or 1-5 can be defined. This type of question can be used where all products offer, in some degree, a particular option. I.e. all products have a price, or a weight. Products do not get eliminated from the selection process for scale question, but their rank the selection process will get changed. You need to configure this type of question further with weighting. For example you can give the first option (Not important) a value of 1, the middle can have 100, and	 

	the final (Very important) could have 500. This would make a biased result to make sure a “very important” gets a lot of attention in the selection process. By giving the final option a 200, it will be a rather evenly spread. This depends also on what text you will give to describe the scale.	
Triangle	With the triangle question you can define three separate variables and users identify their preference for one feature in relation to another by moving a cross/arrow over a triangle, thus stating their scores. The triangle question is set to be the last question in the dialogue. You cannot have more than one question of this type. You can just activate the triangle question, or disactivate it. The triangle question triggers the marketing message of the result page. Please note that you will need to create and upload a triangle image with your answer options.*	

*) **Uploading a triangle image:**

Copy the triangle images into this directory: "[WA Root Directory]/img/" (i.e. via ftp, sftp, webdav, ...)

The name of the file needs to be: triangle_X.gif
In place of the “X“, write the language ID. So you can have a triangle for each language.

For example: For the language with the ID 3, use a triangle you get the following: [WA Root Directory]/img/triangle_3.gif

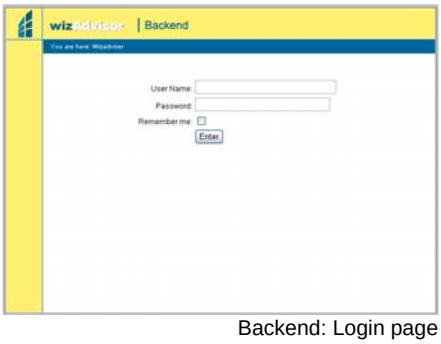
To see which of languages, which you have set up, has which ID in the system, go to User Interface Data>Language>Edit/View

3.5 Add questions into the tool

Once your questions and answers have been finalized you can enter them into the tool. Log into the backend to begin.
It is recommended that you edit the current mobile phone demo content first, rather then deleting it all and starting from scratch – at least until you feel comfortable in using the application. This will help you to orientate yourself at the start.

Note - for international use: Each setup has a first language. New content entered first time (not edited content) will be transferred automatically to blank fields in other language version to provide guidance for translation. When adding or changing content, it is recommended to start always with the same language (Additional languages can be deleted if you are not setting up a multi-language tool.).

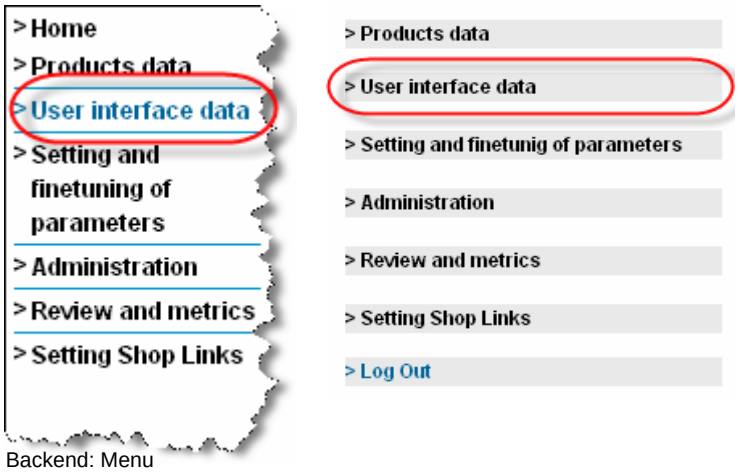
3.5.1 Finding section in backend



Backend: Login page

Backend: Start page

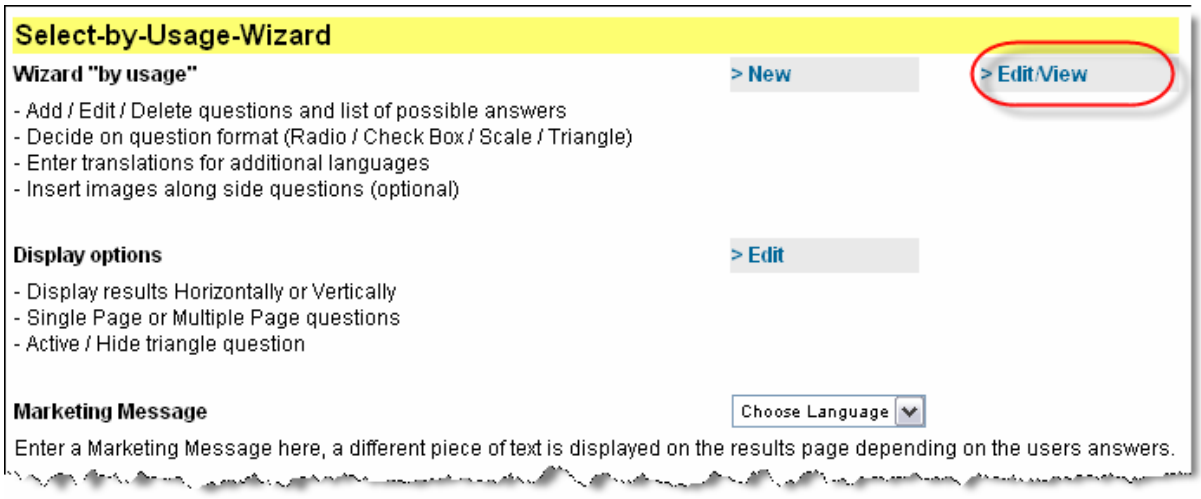
Backend: User interface data



Backend: Menu

Go to the user interface data page from the main menu.

Under the heading Select-by-Usage-Wizard select the >Edit/view option

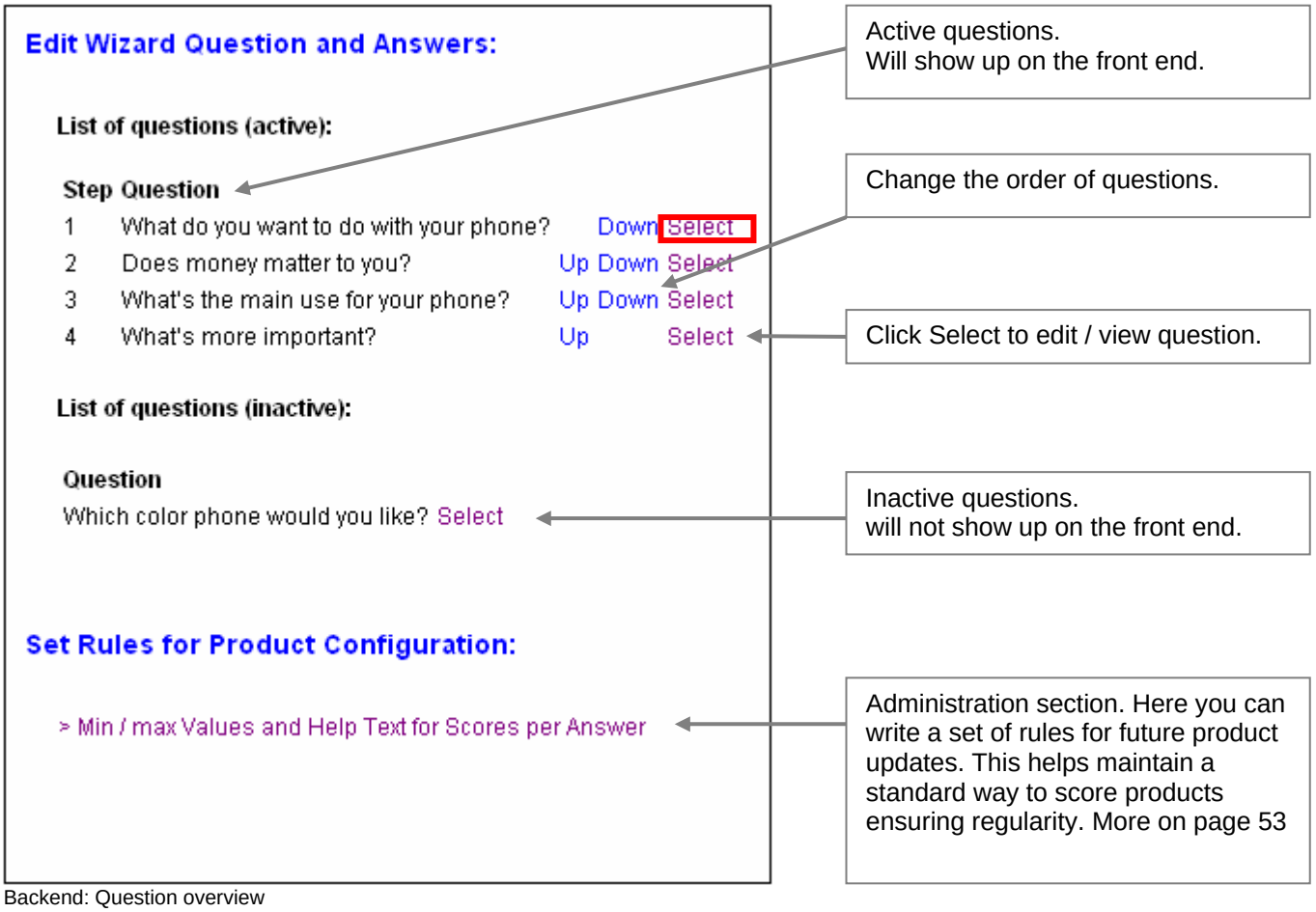


Backend: User interface data

3.5.2 Step 1 – Question overview

You will see an overview of all the current questions from the mobile phone demo. Select question one to replace the content with your question number one.

Backend: Question overview page



Backend: Question overview

Note: After adding questions, by default all products will get a value of “0” as product scores.
You must set scores for at least one product for the select-by-usage-wizard questions to have them shown up on the frontend. (You can just set a score of 1 for testing, see page 50 for adding scores and see page 9 for dynamic questions).

3.5.3 Step 2 – Define question type

Having “select” on question, the next page displays settings for the type of question.

In the demo version question one is a single choice (radio button).
You can change the type here to match your question type.

To edit the question content like title, answers etc… you need to select a language first.

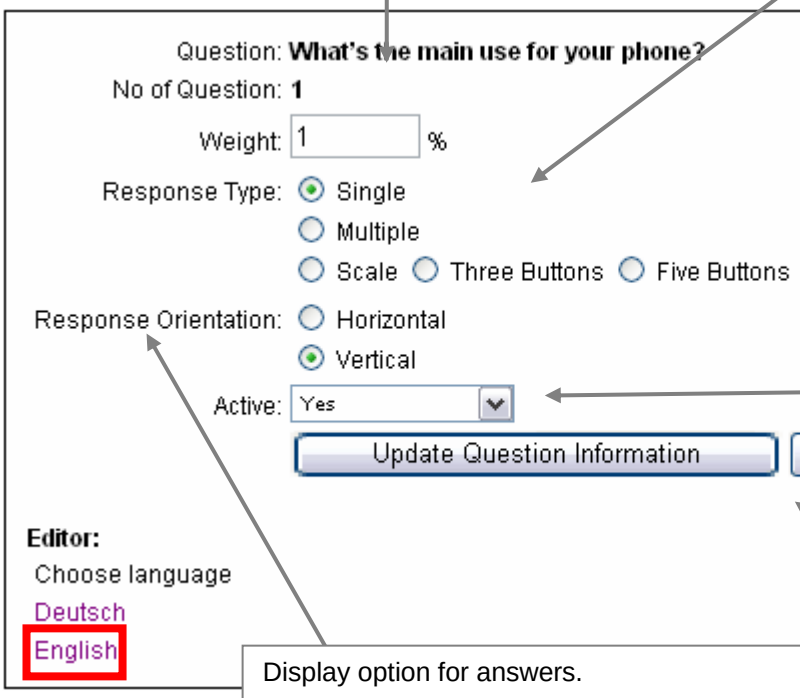
Backend: Question type page

Decide the weight of the question. A higher “weight” places more importance on the question. Read more about configuration and scoring here: page 50.

Choose the question type.
Check boxes / Radio buttons / Scale

Note: By default the final question will become a triangle question. To add a triangle question select the “multiple” option. If you do not wish to use a triangle question it can be set inactive. Read more about triangle questions here. Page 4

Backend: Question type

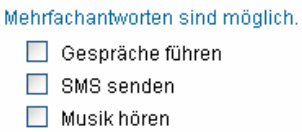


You can deactivate a question here. For example if your question is to be removed for a short time and replaced with another, you do not need to delete the question. If the new question does not work as expected you can always reactivate the previous one.

Display option for answers.

Example Horizontal:

Example Vertical:



Save the changes or delete the entire question.

Enter the question and answers here for all languages.

Note: We recommend that you edit the demo content rather then deleting questions for easier orientation, until you become more familiar with this tool.

Note: In the mobile phone demo the default language is called “English”. You can rename it to i.e. “Deutsch”, and overwrite the demo content with German content to have German as default language. For language set up go to page 70.

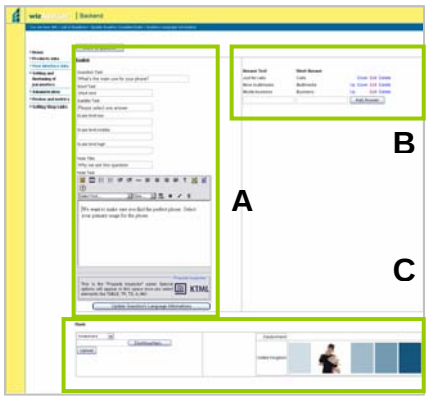
3.5.4 Step 3 – Question text

There are two main parts or sections to edit when entering new questions.

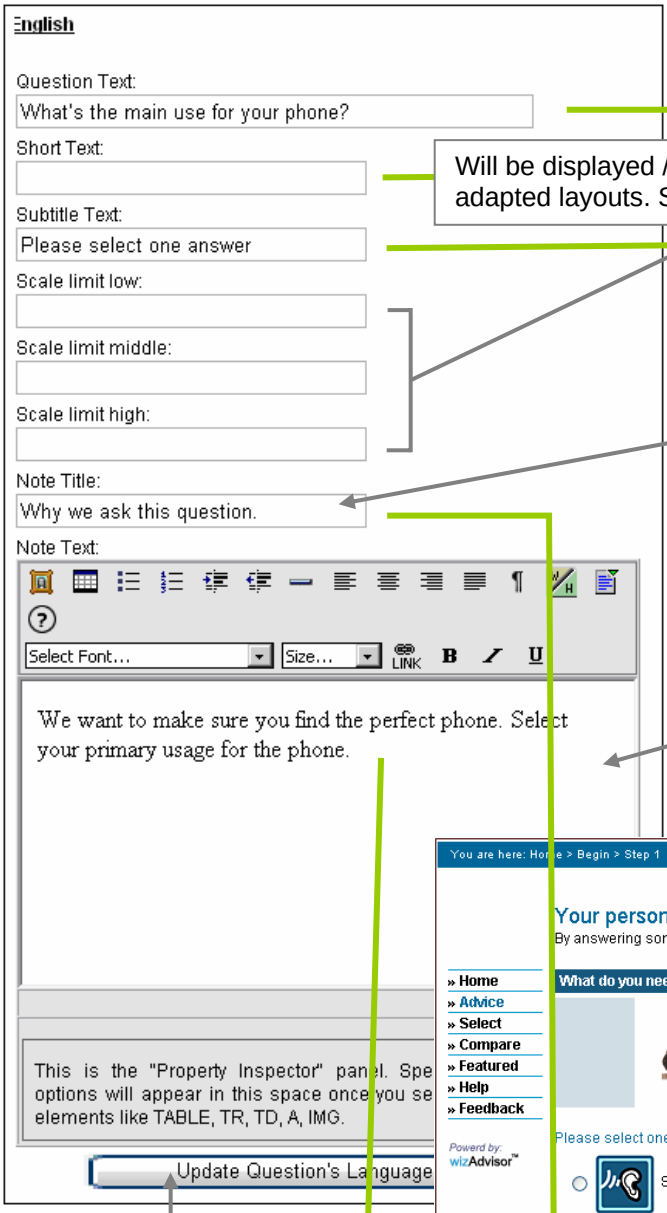
- Question text
- Answer options

Question Text

Update this form with your question information. Remember to save this section before moving to the next. Enter the actual question, contextual information etc…



Backend: Main question 1 page



Backend: Question text

Will be displayed / used only in adapted layouts. See page 84!

In the demo content, question one is of a single choice radio button type. Therefore the three fields for scale questions are left blank.

Contextual note title.

Contextual text is added here. It provides further information for users when answering questions. Use the rich text editor to upload images or icons or add information links. For complex designs or formatting the HTML editor can be used.

Save

Frontend

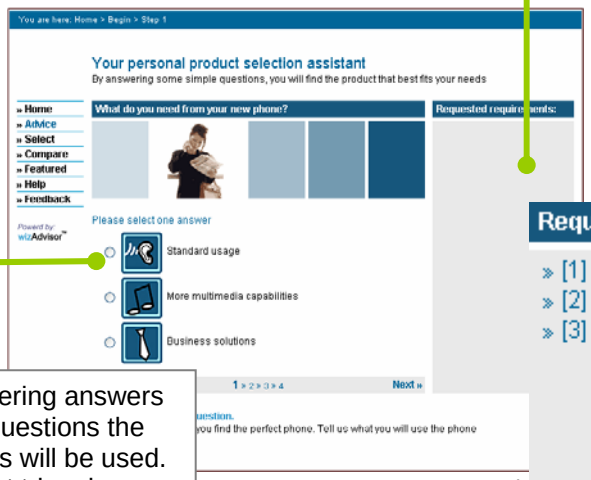
3.5.5 Step 4 – Answers

As you enter each question you can also add answers from the same page. On the right hand side of the main question page you will find the answer section. This view is for Single Choice (radio buttons) Multiple Choice (check boxes) and Triangle Questions. Further options are displayed for Scale Questions (see Scale Question overview illustration below).

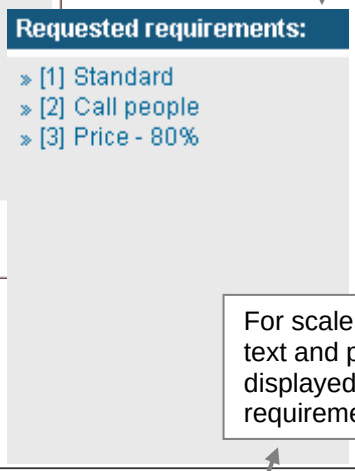
Change the order of answers shown on the front end.
Edit /Delete /Add answers

B

Backend: Answer overview



The short text appears on following pages as a reminder for users about previously selected options



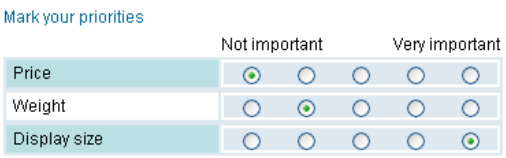
Frontend

Note: When entering answers for the triangle questions the first three options will be used. Read more about triangle questions here Page 18

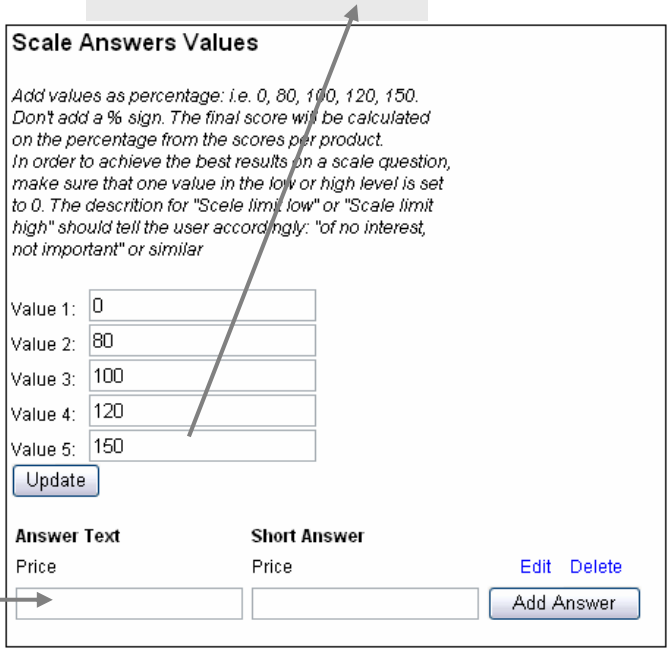
For scale questions the short text and percentage value are displayed in the requested requirements box.

A slightly different view is displayed for scale questions. The bottom part is the same and you can add multiple answers, for several scaled responses to one question.

Example:



Frontend: not used in demo content

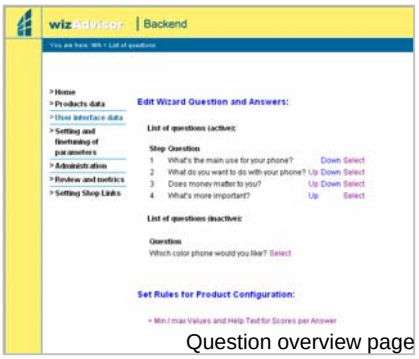


The mobile phone demo only has one answer scale however you can add more options here.

3.5.6 Step 5 – Translations

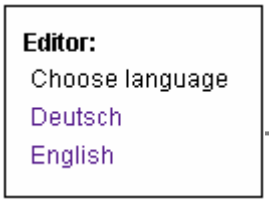
Once all questions and answers have been entered for one language you can start to enter translations. To learn how to add languages and countries see section on page 71.

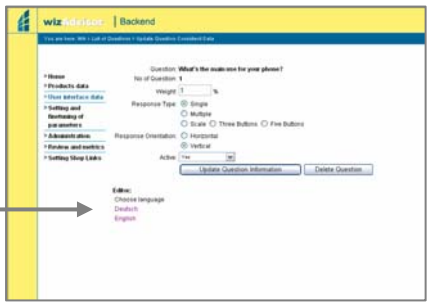
Using the backend main menu go to the User Interface data section. From here select the Edit / View button under the Select-by-Usage-Wizard section. A list of all questions is displayed. Click Select on the corresponding question for which you want to enter translations. For more help on how to find these page please refer to 12.

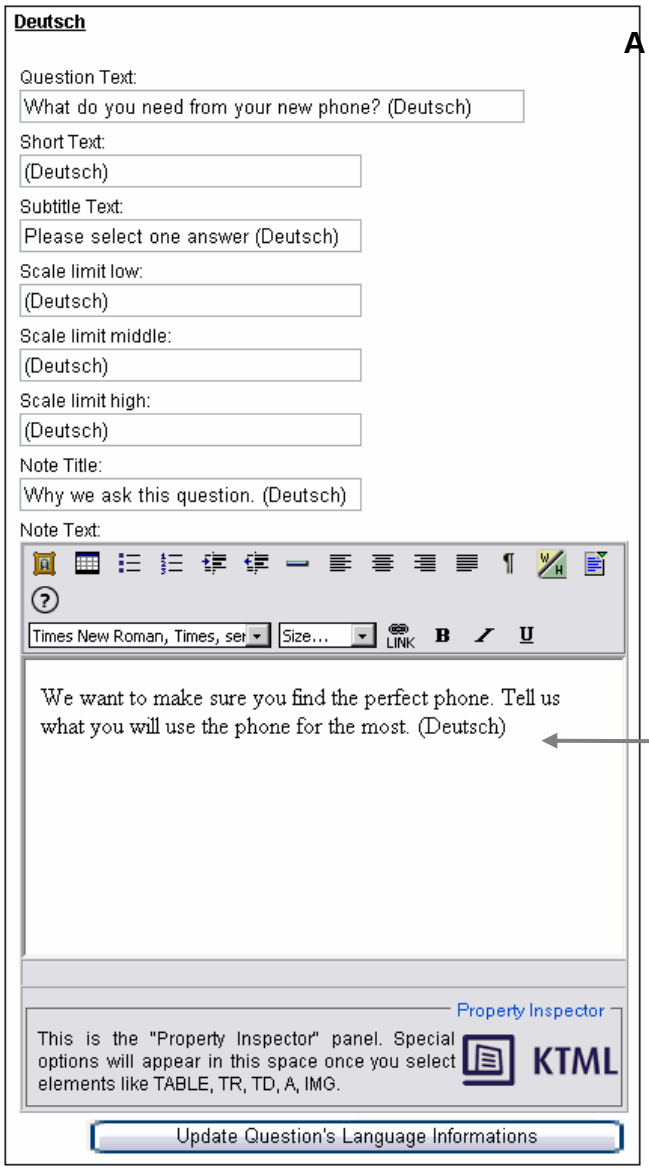


Question overview page

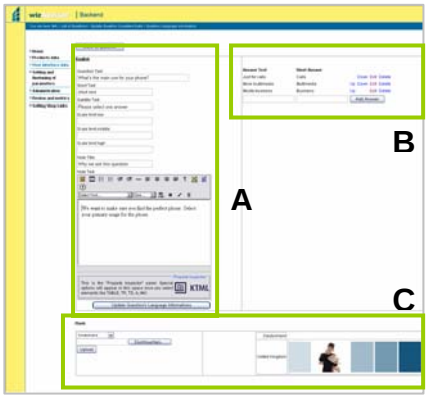
You will then be directed to the Question Type page. At the bottom you will find a list of all your languages. Make your selection.







Backend: Question type page



Backend: Main question 1 page

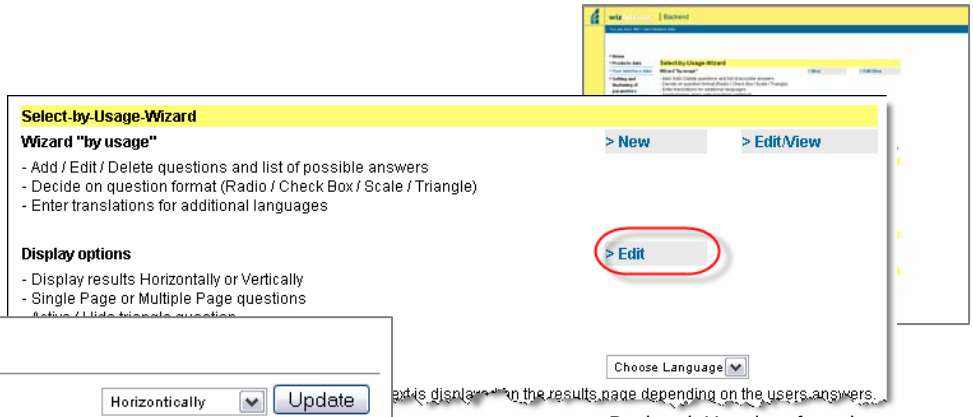
The process of entering content in other languages is the same as described in steps 4 and 5. You will also notice that the original text entered from the first language is displayed along with the language name in brackets. (This is also the case for all other language related data throughout the tool)

In this example here, English is the first language, and English text is shown as preset on the German fields ("Deutsch").

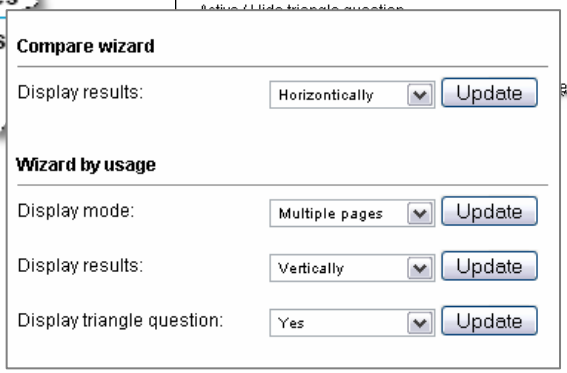
3.6 Display options

It is possible to alter the display options for question pages answers and results page for the select by usage wizard and results page options for the compare module. From the User interface data page select Edit from the Display options section. The Display options overview page will be displayed.

Backend: Menu



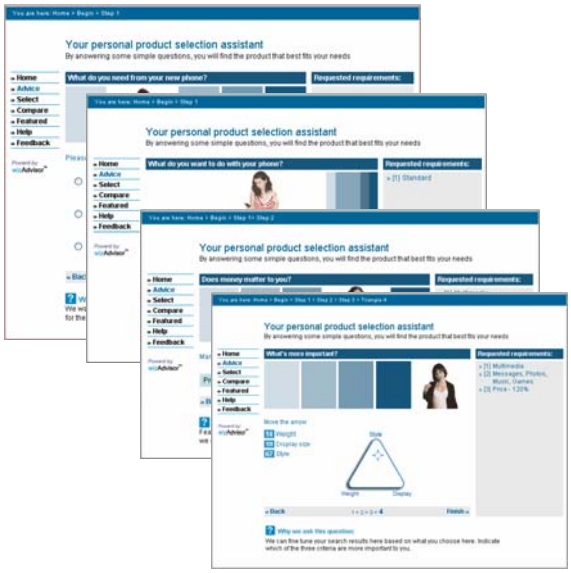
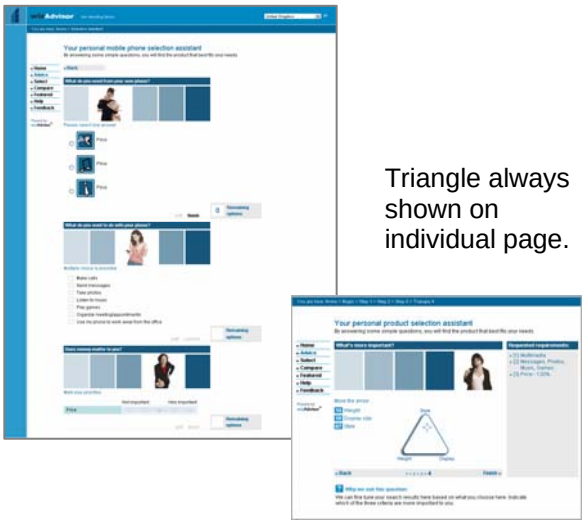
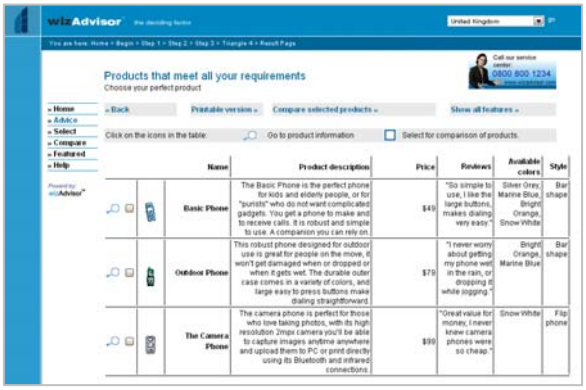
Backend: User interface data

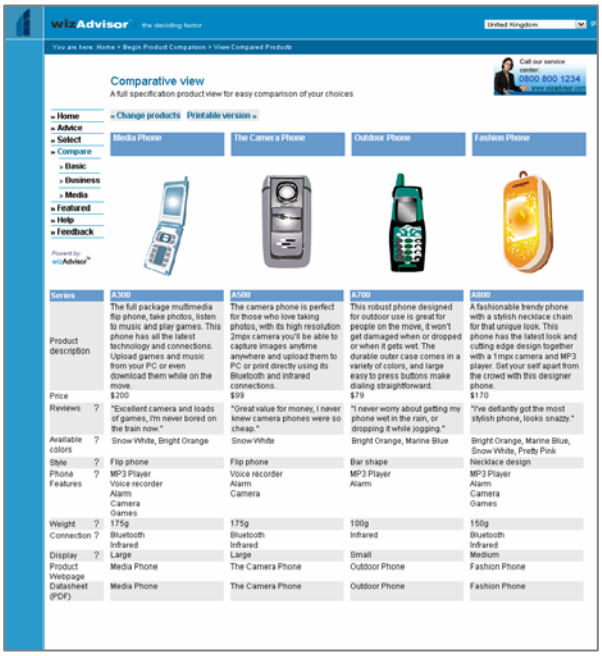
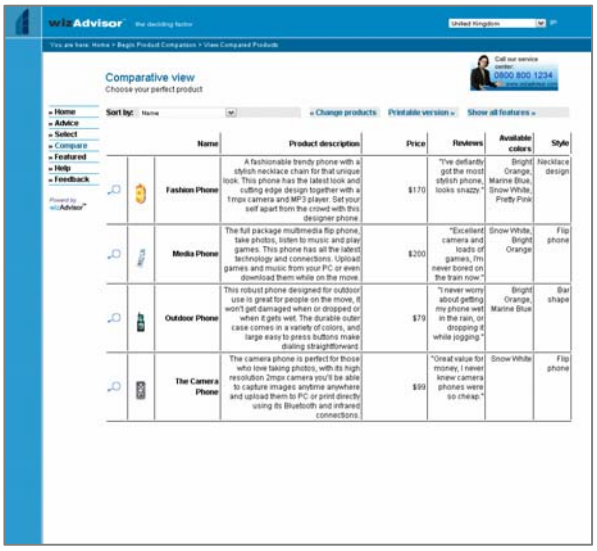


Backend: Display options overview

These are the current settings in the mobile phone demo.

This can be easily changed to suit your design. The table below outlines the difference.

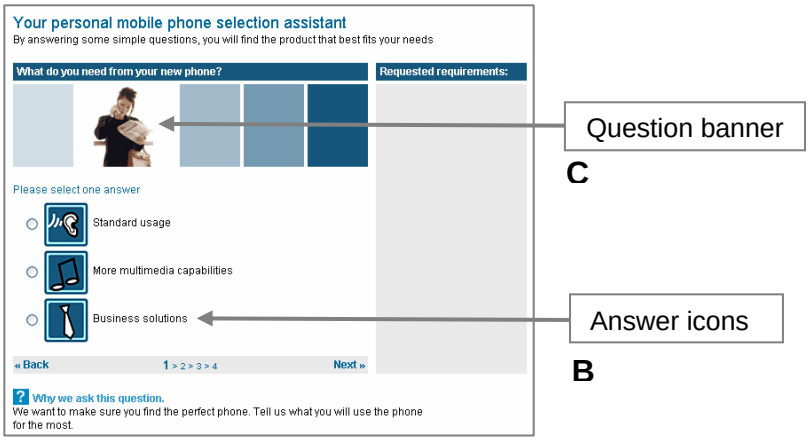
	Current view on demo	Alternatives
	Select by usage wizard	
Display mode	Multiple pages	One page
		 Triangle always shown on individual page.
	A standard template is used for all questions. There is no limit on how many questions you can add. Each question is displayed on an individual page.	This view provides an alternative layout style. Users will answer all questions, except the triangle, in one page, with the triangle following on a separate page. This view is very useful to see all questions and all possible answers together.
Display results	Vertically	Horizontally
		
	Yes	No

Display triangle question		Because the triangle question is shown on individual page, it can be easily set inactive. Users will jump straight to the results page. Remember a triangle question can only be the last question.
	Compare section	
	Vertically	Horizontally
		

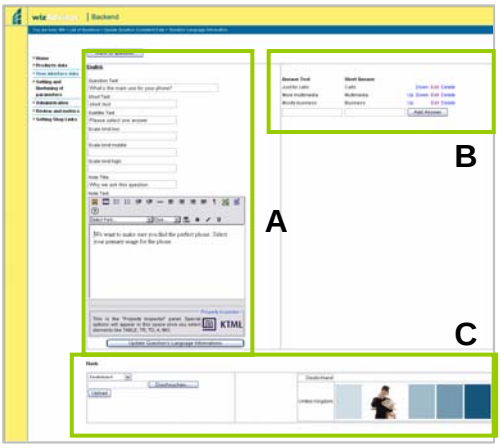
You can also change the display options for answers. Read more on page 14.

3.6.1 Question images

There are two main places that images can be displayed, with regard to questions. Icons or graphics can be used with answer options for single or multiple choice questions and a more general image (question banner) can be added at the top of each question block. Images not only enhance the layout but can provide a better user experience in certain circumstances. Users could choose the color or shape of something by seeing the actual colors or shapes. Brand logos or icons might be better then just having text. The banner image can be used in many ways to “set the tone” of the question using text or animations for example.



Frontend: Question 1 sbu



Backend: Main question 1 page

3.6.1.1 Banners / Question titles

You can upload images, animated gifs or flash to illustrate your question and to make the wizard more attractive. It is possible to use different banner images for each country (particularly useful if you want to add text to the images in different languages). This way you can localize and customize your images per country. If this level of customization is not needed you can just use the same images throughout or use none at all. At the bottom of the main question page you will find a section called Flash. This is used for uploading and previewing images.

From the drop down box choose the country that you want to add an image for. Find your image file from your local drive and click upload. To remove an image simply leave the field empty and click upload.

You can upload files in the following formats:

- .gif
- .gif (animated)
- .jpeg
- .jpg
- .swf

Recommended size for images in the standard layout is 400x100 pixels

Backend: Question image upload

You will then see a preview of the files you have uploaded for all countries here, if you have uploaded an animated gif or flash file you will also be able to see a working preview.

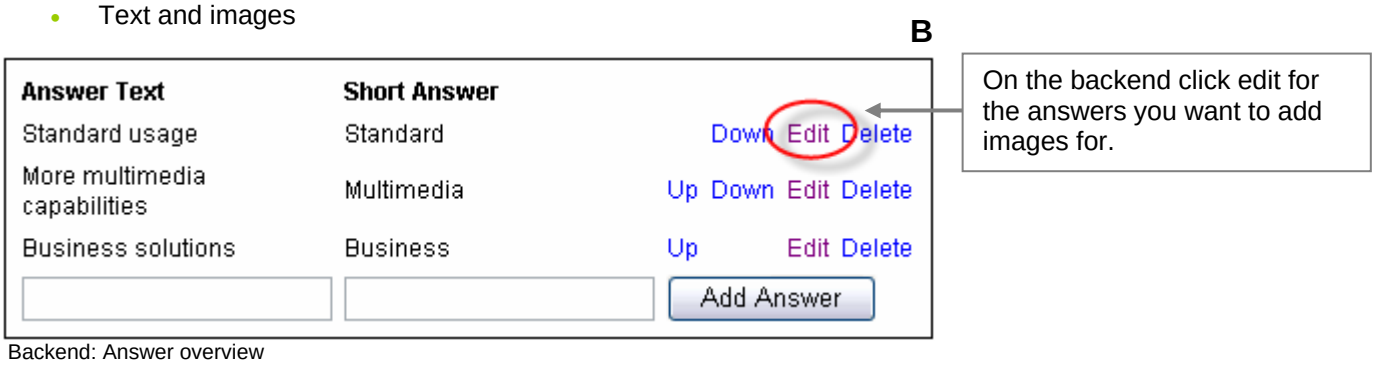
Backend: Image preview

3.6.2 Add icons for answers

In many situations icons or graphics next to answer options will not only make the layout more attractive but will engage users more. Answer icons might not work for all questions but in the right cases will help create a user friendly wizard. You might want to have photos of features, for example, instead of long descriptive text answer options.

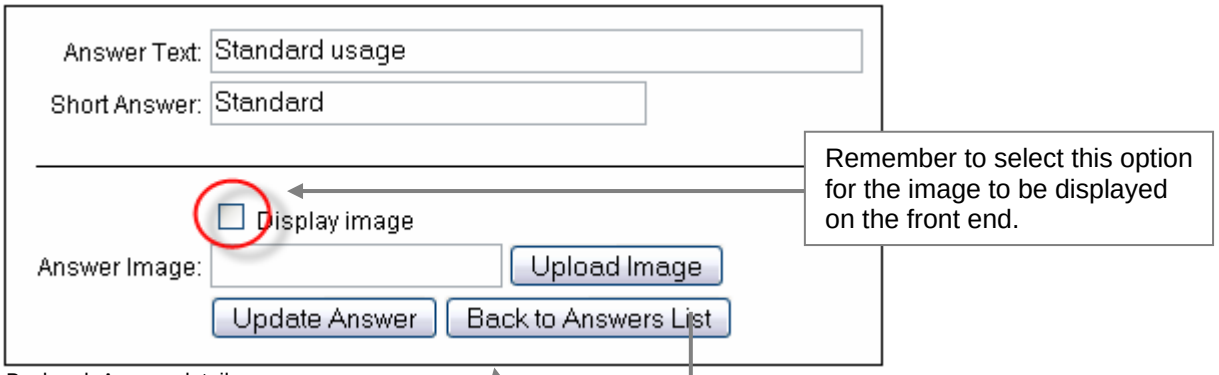
Answers can be:

- Text only
- Images only
- Text and images

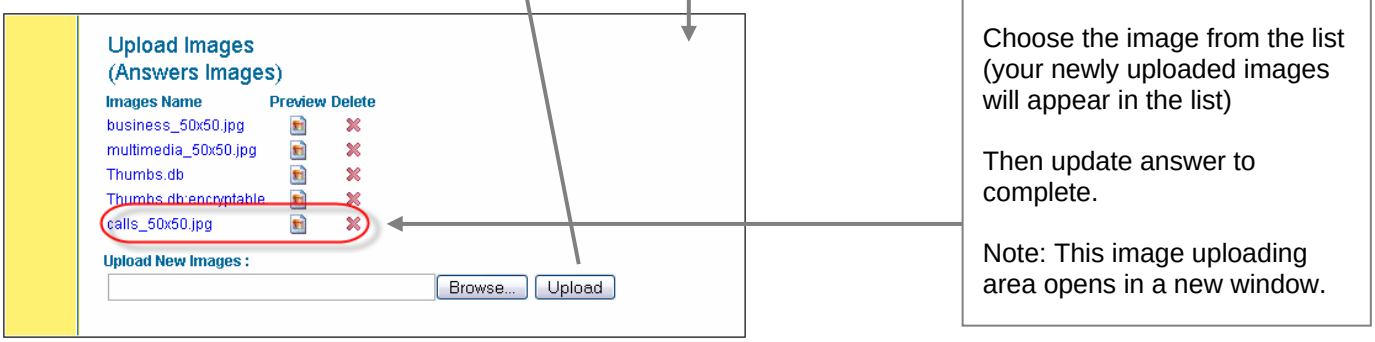


Backend: Answer overview

A detailed view of the question answers and image upload section will be displayed. Upload images and graphics from your local drive into the wizAdvisor. Then select which image you want to display for each answer



Backend: Answer details



Backend: Upload image – pop-up window

3.7 Marketing message

A special feature of the WizAdvisor tool permits specific messages to be displayed based on a users selection. This way, messaging is modified based on how the prospect was qualified.

The marketing message element works with the triangle question. There are four preset message options which can be edited: One default value and three for each point on the triangle.

Users selection on triangle:

Marketing message displayed on results page:

Move the arrow

33 Weight
33 Display size
34 Style

The right selection of products for you

Choose your perfect product

Default value. If no answer scores more then 50 here, the default message is displayed.

Move the arrow

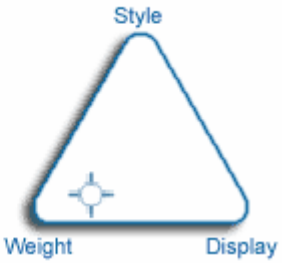
19 Weight
11 Display size
70 Style

The right selection of products for you

Innovative products fitting your lifestyle

Move the arrow

66 Weight
19 Display size
15 Style



The right selection of products for you

A handy and practical choice for you

Move the arrow

14 Weight
76 Display size
10 Style

The right selection of products for you

Maximum functionality to suit your needs

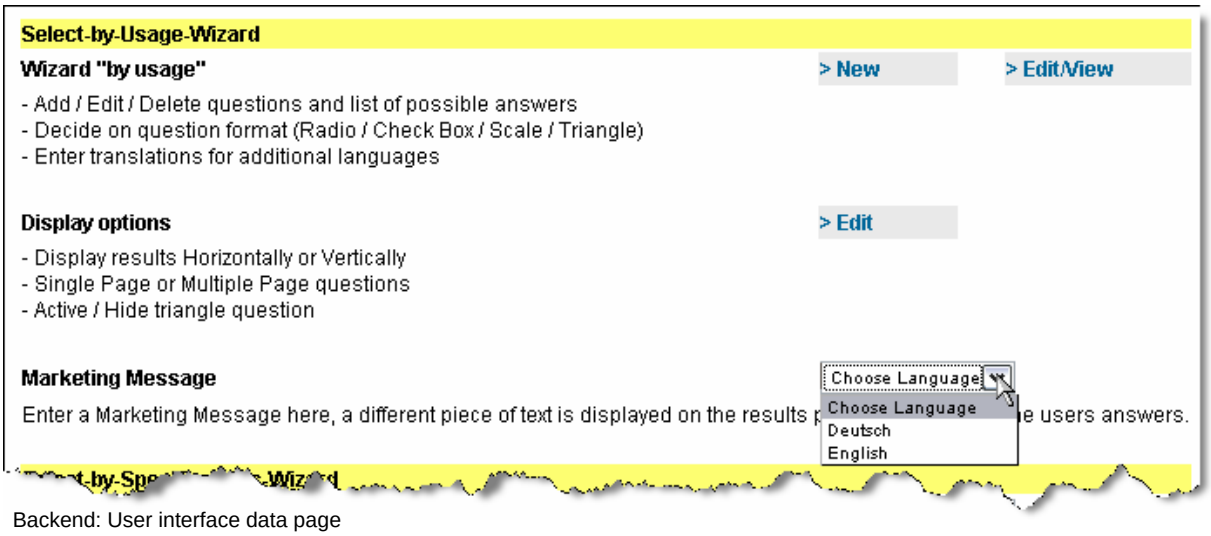
More then 50 points initiates the corresponding marketing message.

Frontent: Triangle question

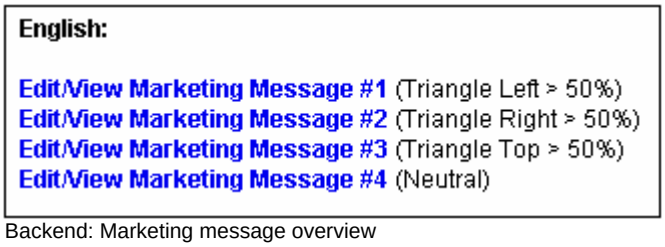
Frontend: Results page title and marketing message

The marketing messages can be modified from the marketing messages page in the backend. Click on the language from the language selection drop down box on the User interface data page within the Select-by-Usage -Wizard section.

Backend: Marketing message page

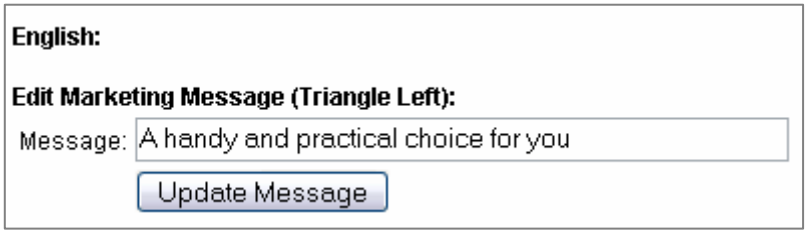


Backend: User interface data page



Backend: Marketing message overview

Select the language, from the User interface data page. Select the message (triangle top, left, right or neutral) enter the new text and save.



Backend: Modify marketing message

3.8 Results

Choice 1

Marketing message *(sub-title)*

Choice 2

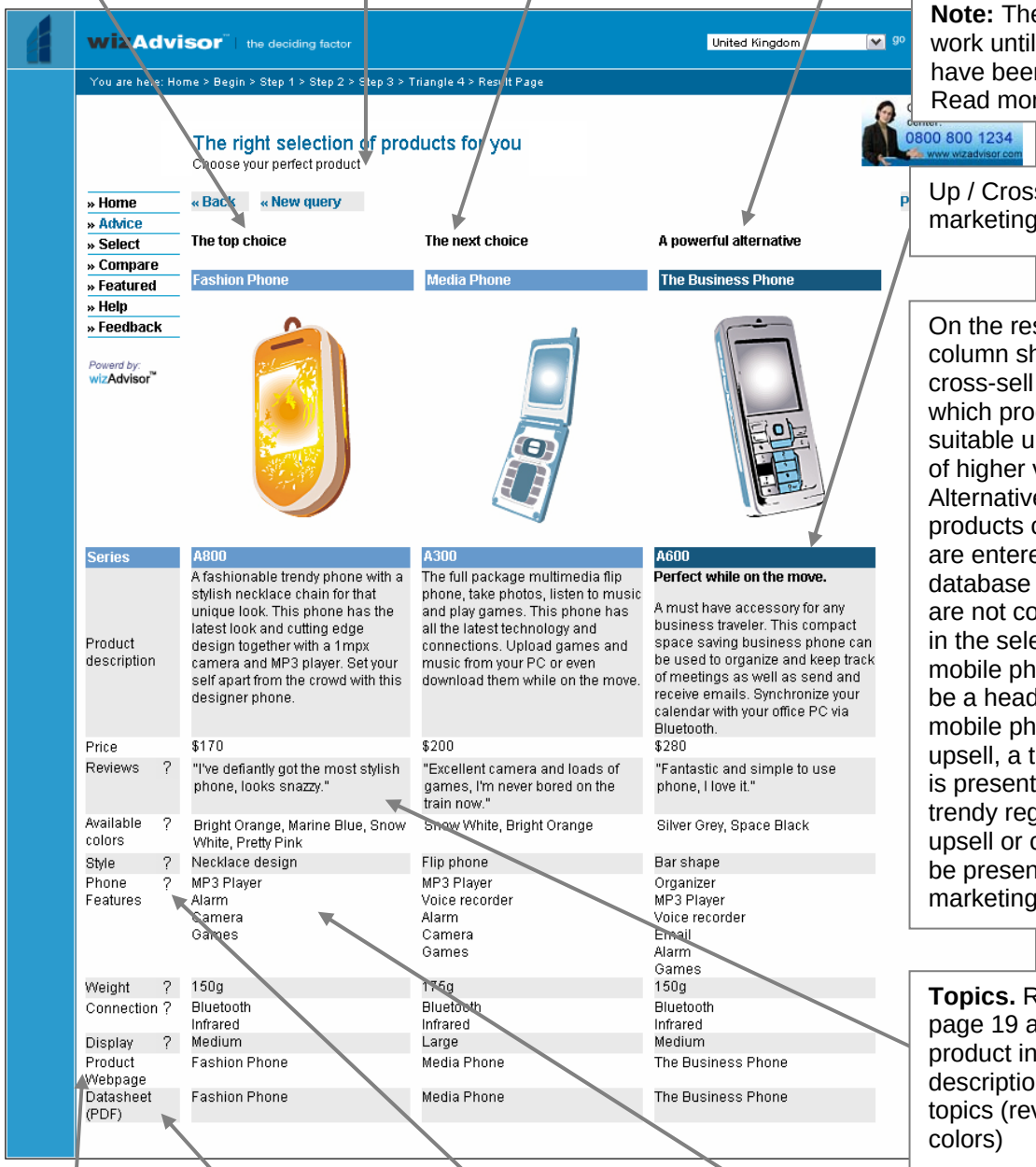
Upsell / Cross-sell product

The Select by Usage wizard only displays a maximum of three products.

Note: The wizard will not work until product scores have been configured. Read more on page 57

Up / Cross – sell product marketing message.

On the result page, the third column shows an upsell- or cross-sell option. Depending on which product is first choice, a suitable upsell product (typically of higher value) is presented. Alternatively, cross-sell products can be offered, which are entered in the product database of the WizAdvisor but are not configured to take part in the selection process. In the mobile phone demo, this could be a headset or car kit for the mobile phone as cross sell. For upsell, a trendy business phone is presented as upsell to a trendy regular mobile phone. All upsell or cross-sell products can be presented with an individual marketing message.



Topics. Read more on page 19 about how to add product information such as descriptions / price and topics (reviews / available colors)

Related weblink

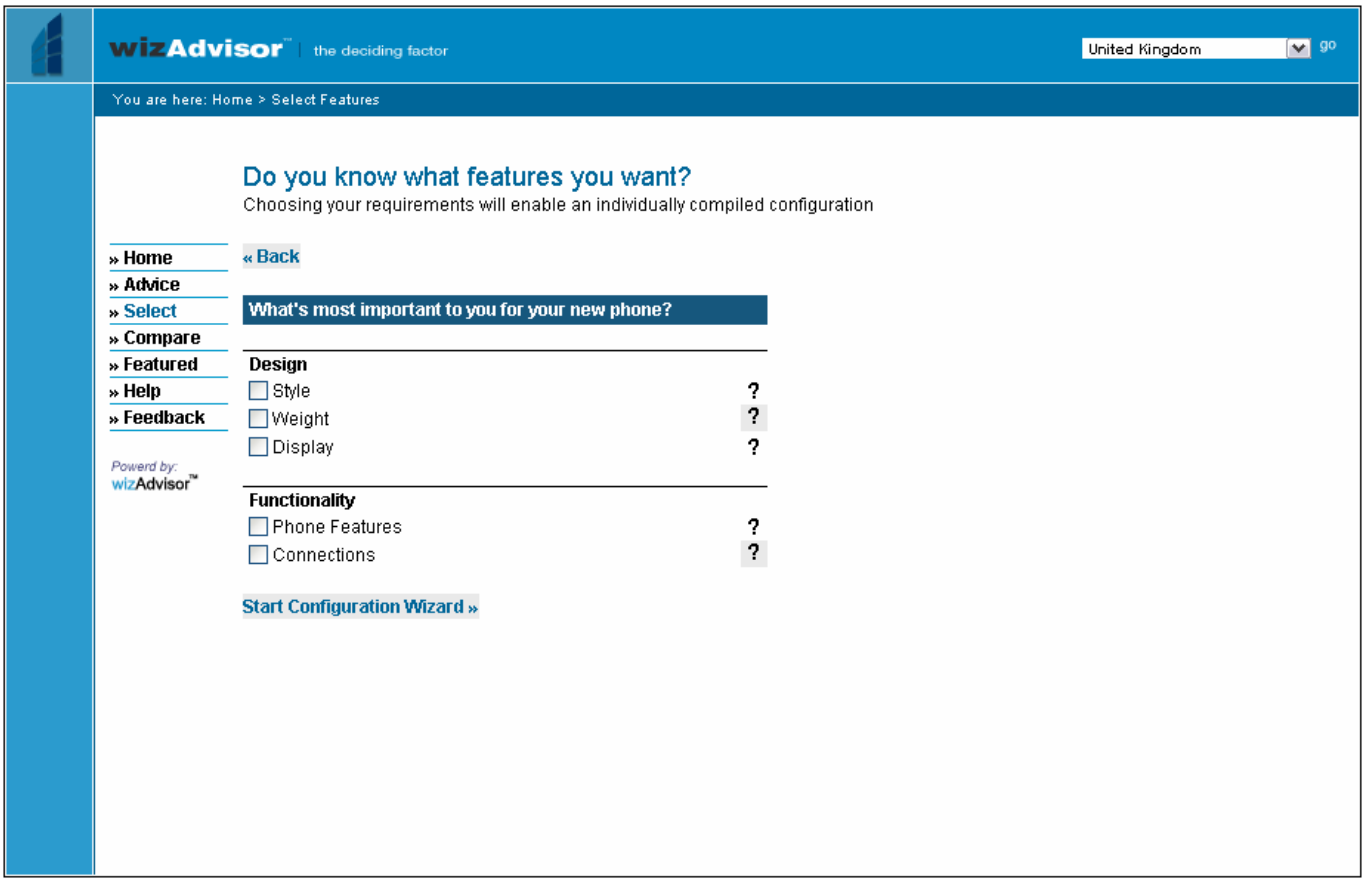
Feature explanations (Info Guide)

Features. This information is taken from the Select by Specifications wizard. See page 21.

Product documentation, datasheets to download.

Frontend: Results page

4 Select by Specifications - Wizard



4.1 Overview

The select-by-specs wizard is meant to serve users who know what they want and what they expect from their desired solution: users who are familiar with specifications of products and types of services.

In the user interface, customers select their desired specifications in two steps: first they select what areas of the product / service they are interested in, secondly all options for these areas are presented. Users select features and state requirements and are, in real time, provided with a total number of product available matching their requests.

The select-by-specs wizard is working for a configuration like selection process. As a result, users will see all products / services which match all their requirements.

In this chapter you will learn how to:

- Add Question / Categories / Features / Values / Help text
- Use Single choice / Multiple choice / Min-Max options
- Upload icons and graphics

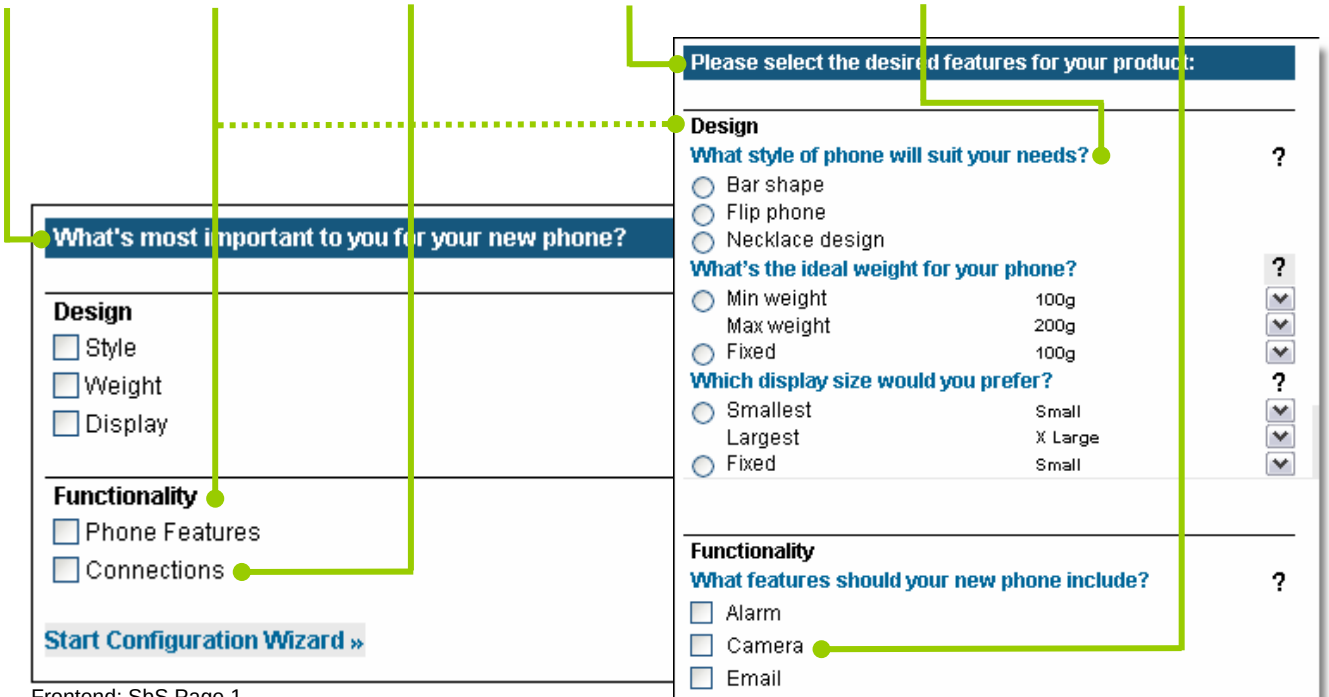
To complete the wizard, you will need the following:

- Product specifications: See on page 43.

4.2 How to organize questions

Keep in mind, all questions and responses are displayed on two pages. How the content is structured, you see on this table (example Mobile Phone Demo):

Main Question	Category	Features	Second Question	Specific Feature Questions	Values
What's most important to you for your new phone?	Design	Style	Please select the desired features for your product:	What style of phone will suit your needs?	Bar shape Flip phone Necklace design
		Weight		What's the ideal weight for your phone?	100g 150g 175g 200g
		Display		Which display size would you prefer?	Small Medium Large X Large
	Functionality	Phone Features		What features should your new phone include?	Alarm Camera Email Games Organizer MP3 Player Voice recorder
		Connections		Select the connectivity capabilities that you require:	Bluetooth Infrared WLAN



Frontend: SbS Page 1

Frontend: SbS Page 2

4.3 Defining elements

4.3.1 Questions / Categories / Features / Values

The select by specifications wizard can contain as many Categories, Features and Values as you wish. When deciding upon a structure, first complete a table detailing Questions, Categories etc… – create a table using the example on page 9.

Note: It is recommended that you do not start entering content into the backend until you have a draft ready on how to structure categories and features. Additional Categories, Features and Values can be added at any time. Only when changing the structure of categories and related features, you will need to redo the entries.
Note: To enter the values, you need to have a product list which contains all values of all product features. For example: In the mobile phone demo, the Weight Value lists all the possible “weights” of all phones.

- Categories (Headlines to group a set of features). Make one category for a handful of features. When you test it on page 2 of the wizard (where all values are displayed), one category should fit on one screen. This way users always will have a feedback-field in sight.
- Features (Feature elements, serve as header to the specific feature values the user can then chose from). For the features, a help information is offered. See page 50.
- Values (the specific feature values which products have)

Please refer to the table (page 27) for clarification of where each item is displayed on the frontend.

4.4 Add variables into the backend

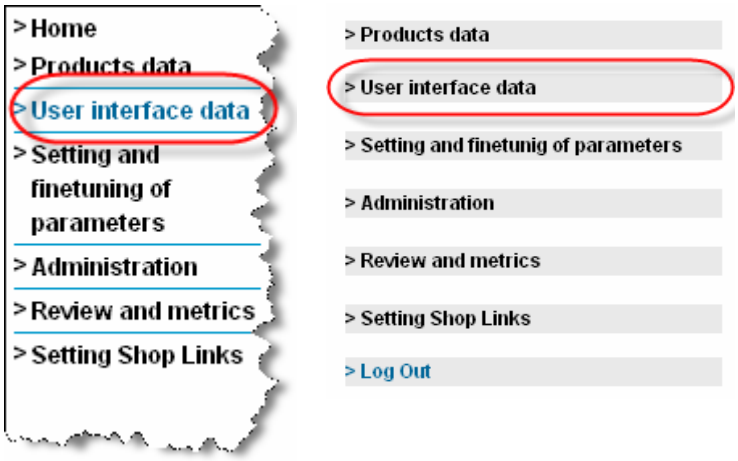
When all questions, features and other variables are decided you can start entering them into the backend. For easier orientation it is recommended that you edit the current mobile phone demo content rather then deleting it all and starting from scratch. Log into the backend to begin.

Backend: Login

Backend: Start page

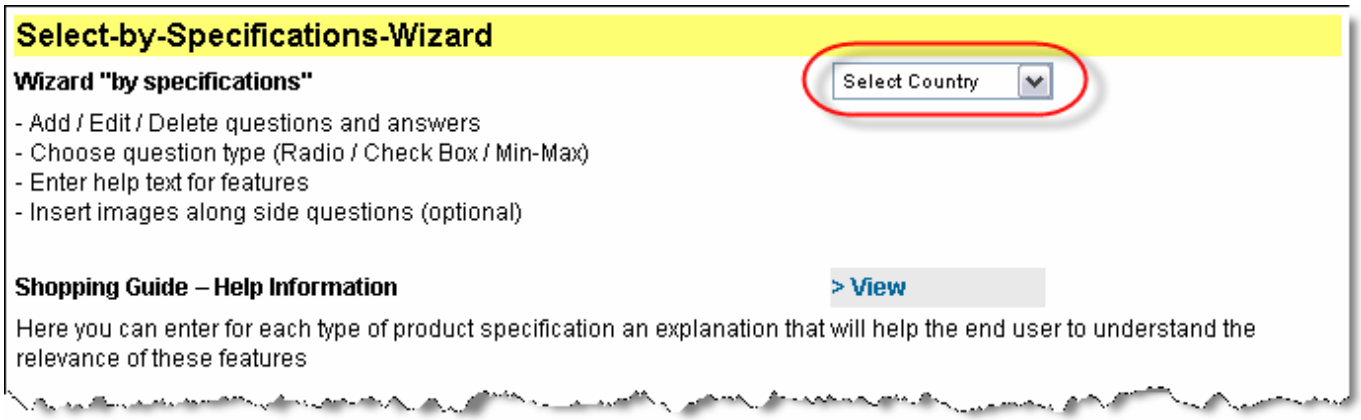
Backend: User interface data

4.4.1 Finding section in backend



Go to the User interface data page from the main menu.

Under the heading Select-by-Specifications-Wizard choose the country. We recommend that you always start with just one for the initial set up of the entire tool.



There are four sections in the backend for entering the content. Navigation through these is linear: You must go from section 1 to section 2 and then section 3, but you cannot go from section one straight to section 3. When you want to edit a Value or add a new one you would first select the Category then the Feature to reach the Value section. The following steps explain these four sections.

4.4.2 Overview of the four sections

Section 1 – Main Question

Questions | 1 - 1 / 1			
Page 1	**Page 2**	**Move**	
What's most important to you for your new phone?	Please select the desired features for your product:	Up Down	Edit Next
			New

Main questions --> Categories --> Features --> Values

Section 2 - Categories

Categories | 1 - 2 / 2		
Name	**Move**	
Design	Up Down	Edit Next
Functionality	Up Down	Edit Next
		New

Main questions --> **Categories** --> Features --> Values

Section 3 – Features

Features | 1 - 3 / 3			
Page 1	**Page 2**	**Move**	
Style	What style of phone will suit your needs?	Up Down	Edit Next
Weight	What's the ideal weight for your phone?	Up Down	Edit Next
Display	Which display size would you prefer?	Up Down	Edit Next
			New

Main questions --> Categories --> **Features** --> Values

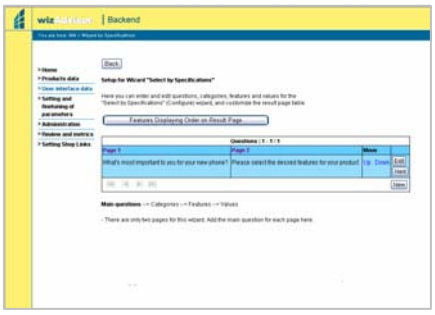
Section 4 – Values

Values | 1 - 3 / 3		
Name	**Move**	
Bar shape	Up Down	Edit
Flip phone	Up Down	Edit
Necklace design	Up Down	Edit
		New

Main questions --> Categories --> Features --> **Values**

4.4.3 Step 1 – Main questions

From the Main Questions page, enter a question that will provide an overview for users.

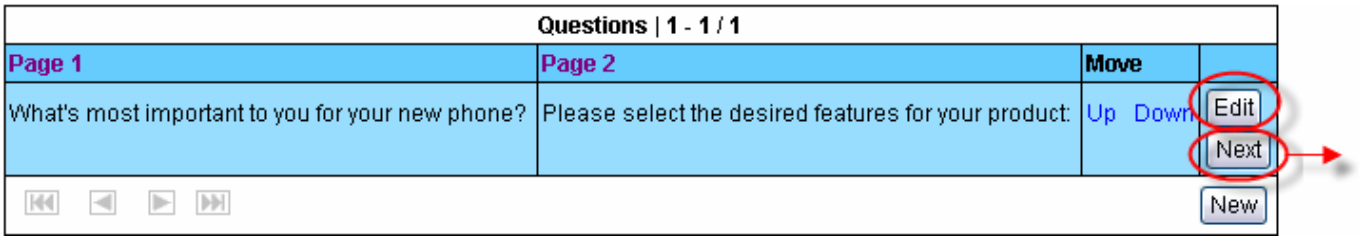


Backend: Main Questions

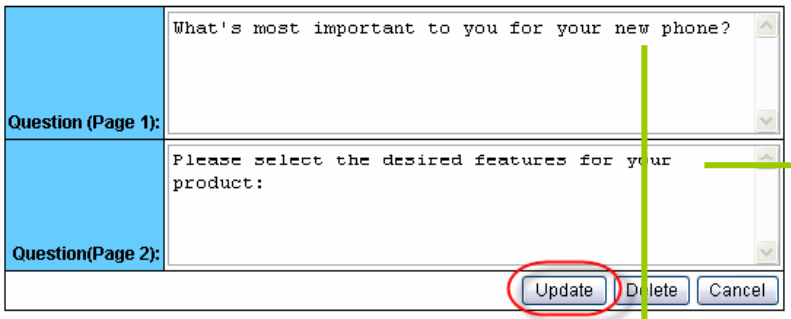
Edit Edit current on this page content

Next Go to the next section (in this case to the Category section)

New Add new Main Questions. Note: Having more than one question allows structuring a larger set of features even further.

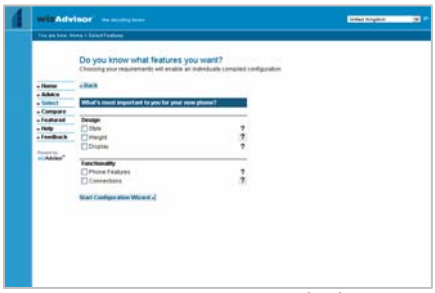


Backend: Main question content table

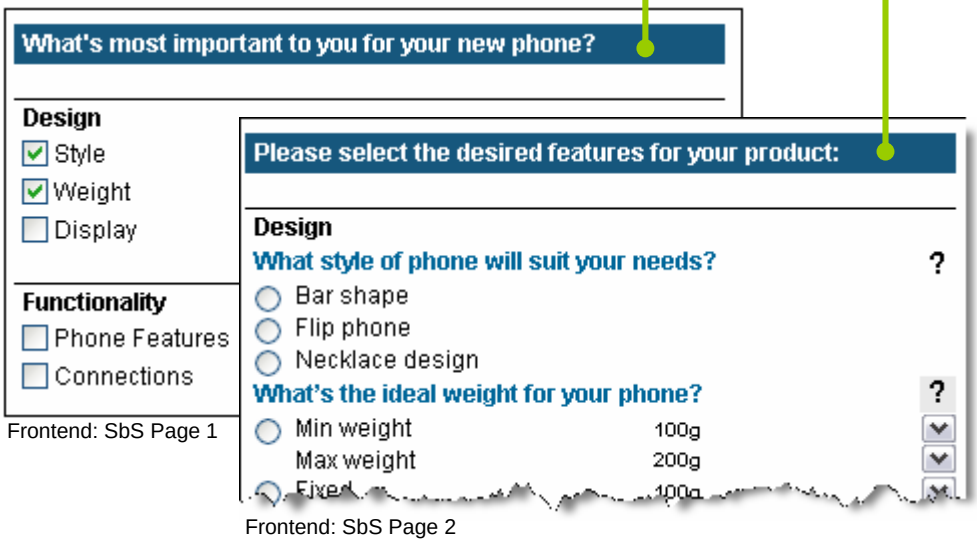


Backend: Edit question field

After adding your questions click Next to go to the Category Section.



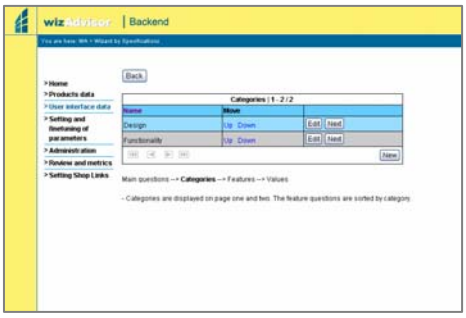
Frontend: SbS Page 1



Frontend: SbS Page 1

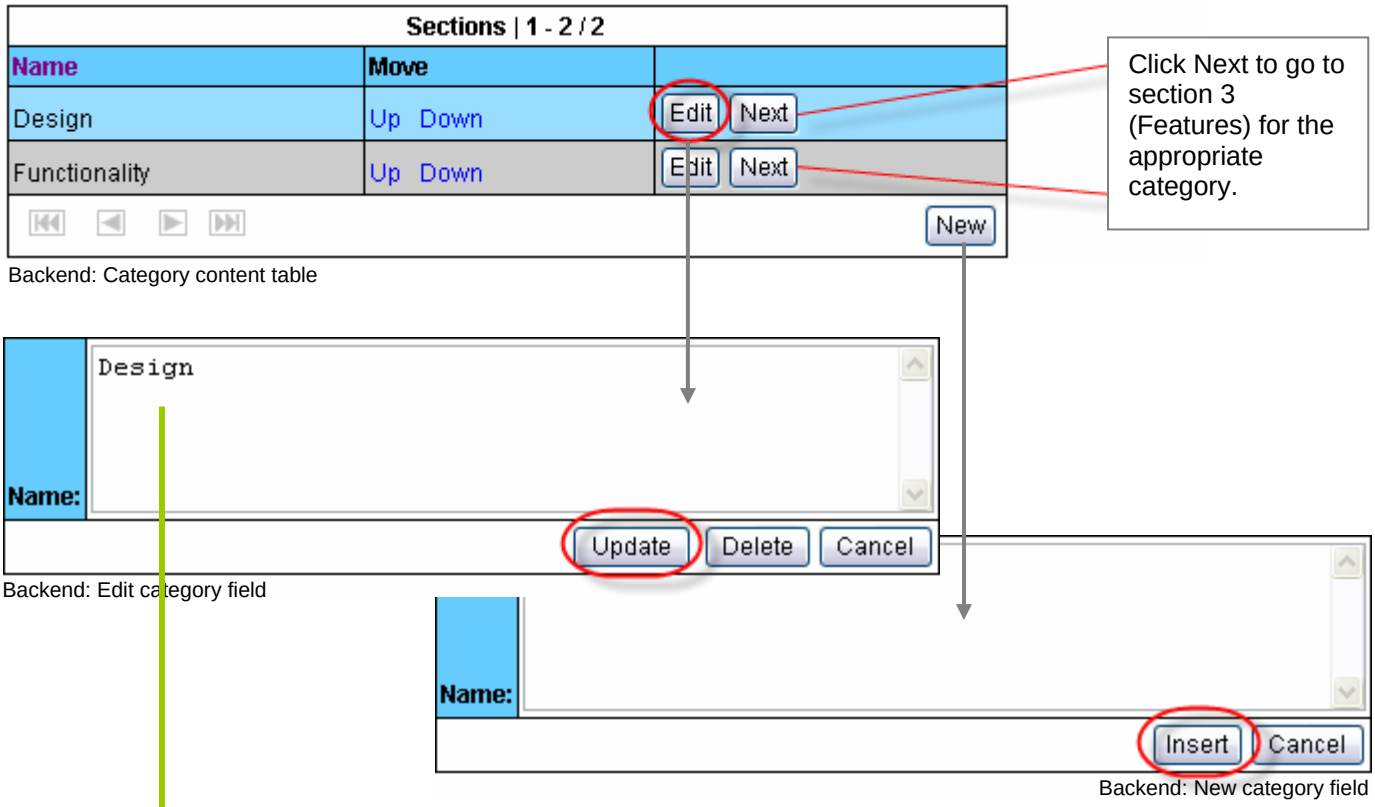
Frontend: SbS Page 2

4.4.4 Step 2 – Categories



Backend: Categories

Edit the demo content and add in your categories. Additional categories can be added using the New-button.

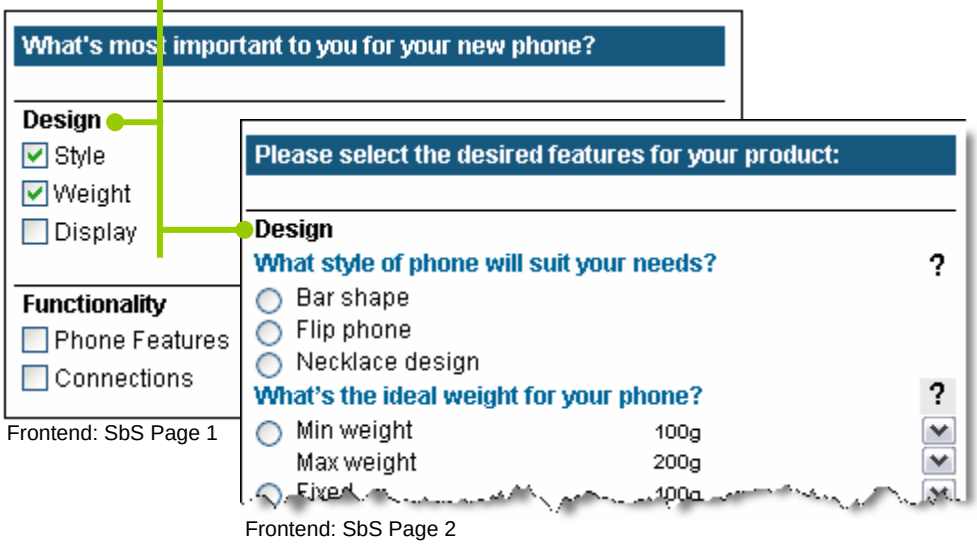


Backend: Category content table

Backend: Edit category field

Backend: New category field

Categories are displayed on page one and two of the wizard. They separate and group features and feature questions.

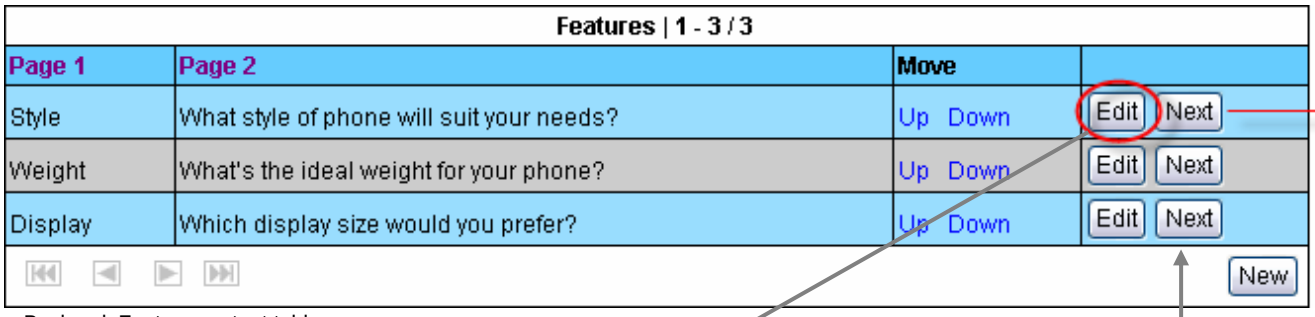


Frontend: SbS Page 1

Frontend: SbS Page 2

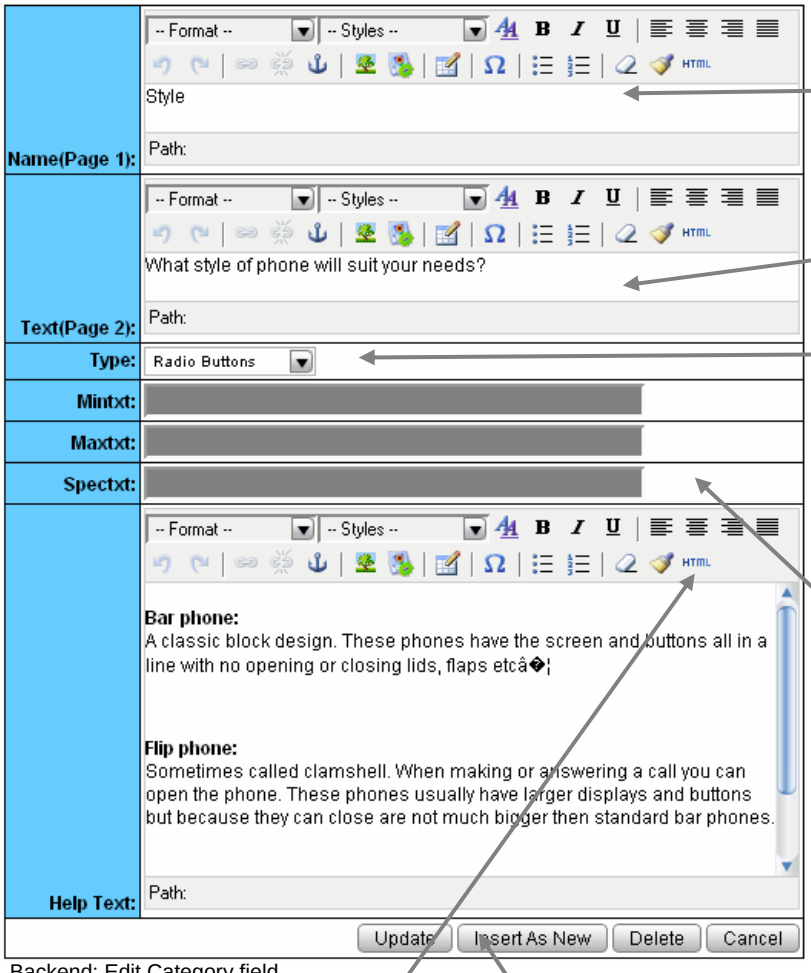
4.4.5 Step 3 – Features

This is the most complex step in setting up this wizard. The feature and the specific feature question form allows you to define the question type (single, multiple, min-max), to enter help information (which will also show up on the info-guide) and to upload an image to visualize this question.



Backend: Feature content table

Click Next for Section 4 – Values, Edit to change an existing Feature or New to add a new one.



Backend: Edit Category field

Add the feature name here. This is displayed on page 1 and on result pages (table). Keep it short – to fit on the table

Enter the question for the particular feature here. This is shown on page 2.

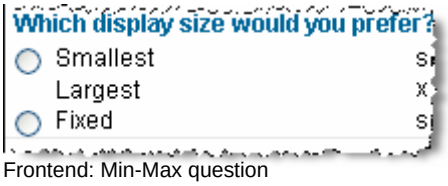
Choose the Question Type:

Read more on page 33.

If you are creating a Min – Max questions enter text here:

- Minimum text
- Maximum text
- Specific text

Backend: Min-Max text for display size feature



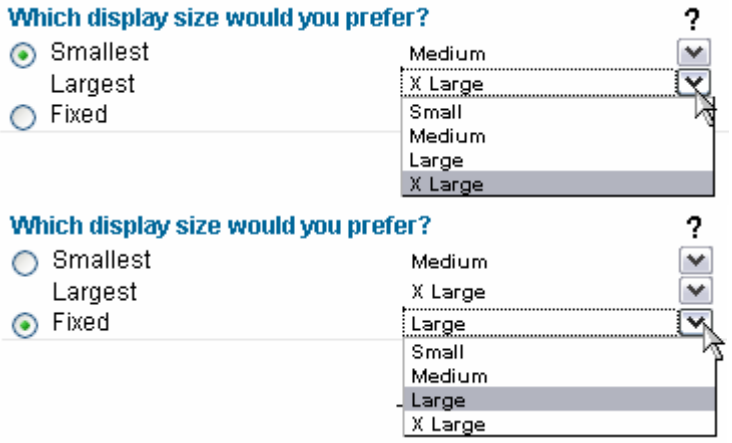
Frontend: Min-Max question

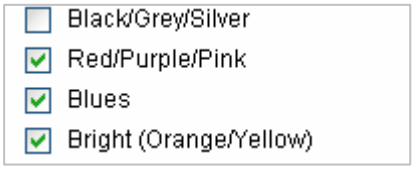
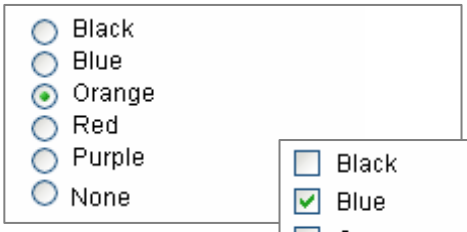
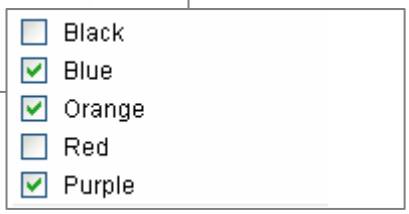
Add Help Text here. The rich text editor allows you to format Help Text further. You can also add HTML content or images if you wish: Switch to HTML view.

Update (to save) or Insert As New (to add as new feature)

4.4.5.1 Feature types

The setup per feature allows to use various types of answering options.

Configuration type Backend / Feature type frontend	Description	Mobile phone demo example
Radio button / Radio button	Users can only select one option. > A product has only one value of the list.	
Check box / Check box	Multiple Choices are allowed for the user to tick. > Products may have multiple of these values. **Note:** The more choices a user ticks, the smaller the number of results will be, as only products matching all values are selected.	
Min – Max range / Radio Button	There are two ways that users can select answers here. 1. Choose an upper and a lower requirement – the tool will keep all products within this range for the results page. 2. Select a fixed requirement. A uses the drop down menu to select the one value which he wants his product of choice to have > Each product has only one value of the list.	

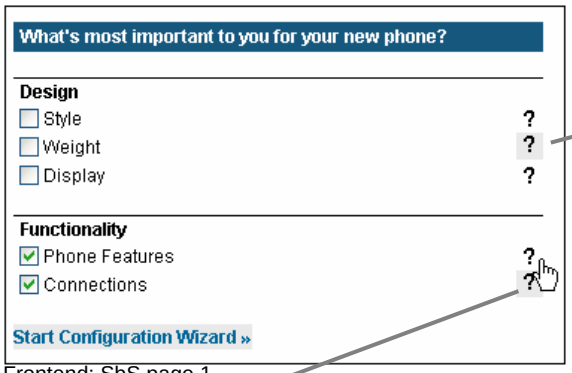
Configuration type backend Feature type frontend	Description	Illustration (not on the mobile phone demo)=
Check box / Radio button	The User has single choice only. > A product may have multiple values of the same feature. Example: A mobile phone will work with many telecom providers, but asking the user which provider he has his contract with, will typically request a single choice answer.	 Backend: (Not on the demo) Frontend: (Not on the demo)
Radio button / Check box	The user is asked a multiple choice question. > A product may have only one value of this feature. Example: Asking for the preferred brand: A mobile phone has just one manufacturer - one brand. The user can tick a number of options for brands he likes. **Note:** The more he ticks, the more phones will be in the result.	 Backend: (Not on the demo)  Frontend: (Not on the demo)

Further explanations about product configuration can be found on page 56.

4.4.5.2 Feature Help text

Each feature has a help text (Information field) which is accessible by website users in a number of places.

Here is an example of Help Text used in the mobile phone demo:



Frontend: SbS page 1

Weight
The total weight of the phone including battery. The weight is shown in grams.

A pop-up Help window opens and jumps to the corresponding help text when a user clicks on the ? icon.

Connections

Bluetooth
A wireless personal area network, that allows the exchange of information between devices. A phone can be synchronized with a PC using Bluetooth for example. It's faster then infrared and there does not need to be a clear path between the two devices.

Infrared
A wireless connection can be established between two phones using infrared, data transfer is slower than Bluetooth. A connection can only be made if there are no objects in-between the two devices.

WLAN
Wireless local area network are basically normal internet connections that you would find in offices or schools. Phones with WLAN can connect to the network without the need for wires. A phone with WLAN can be used to connect a laptop to the internet even at high speed

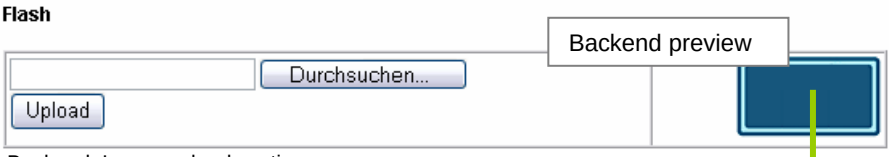
4.4.5.3 Adding graphics to the feature questions

Its possible to add images on the second page of the wizard, next to the actual feature questions. In this example an image has been added to the Connections Feature. From the backend go to the features page, at the bottom you will find an image upload section.

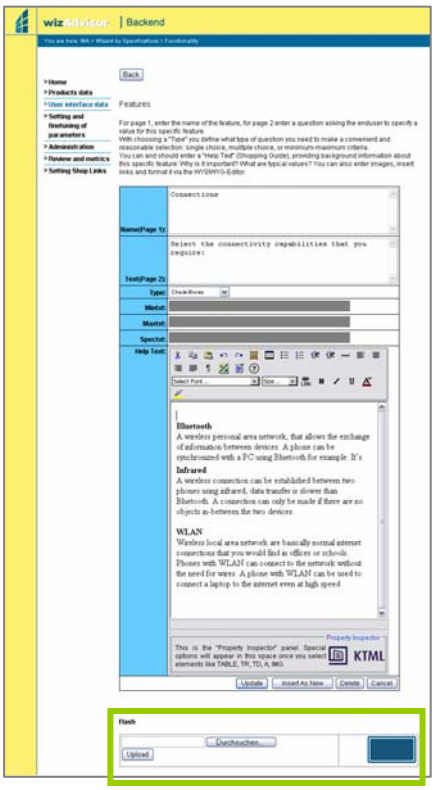
You can upload files in the following formats:

- .gif
- .gif (animated)
- .jpeg
- .jpg
- .swf

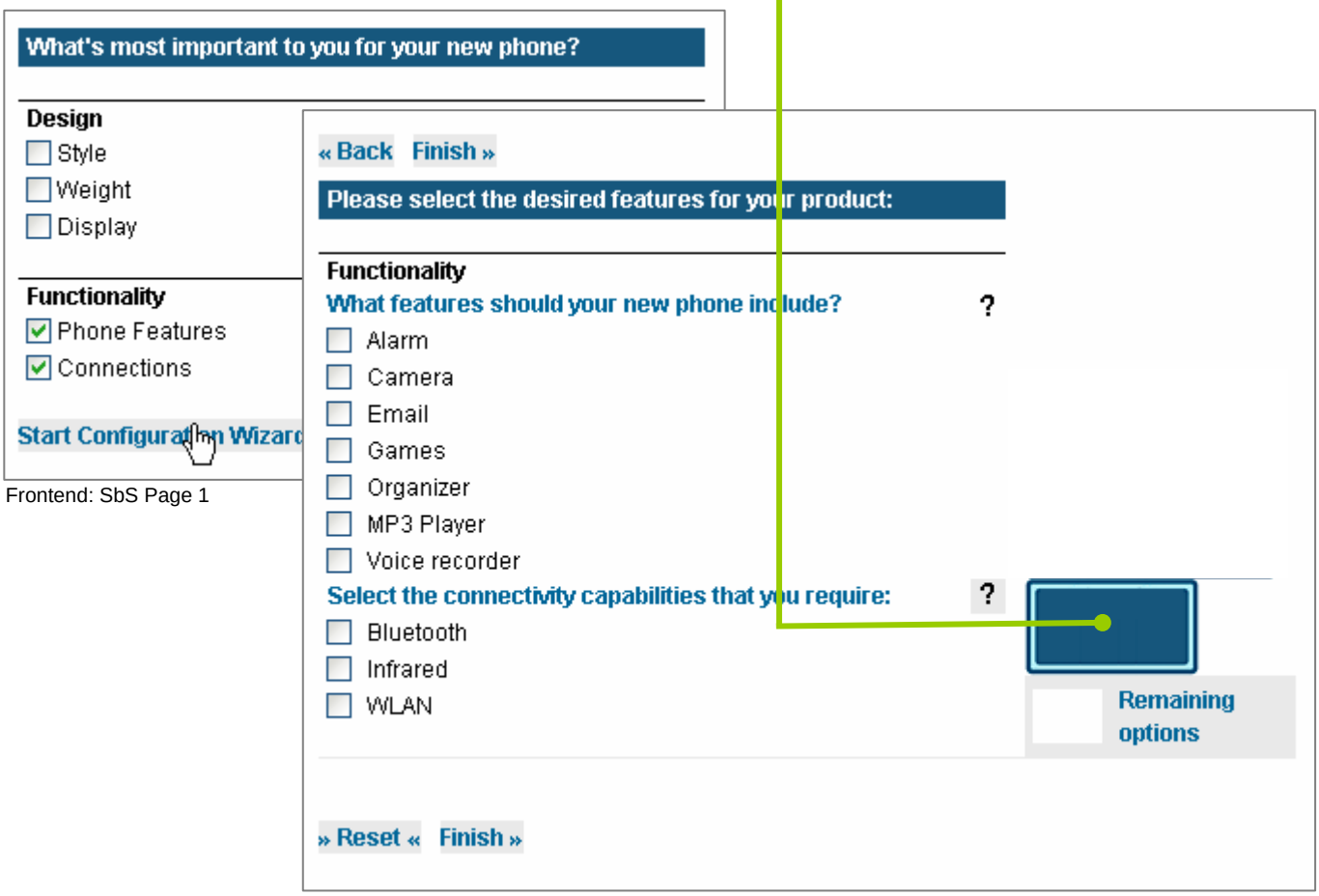
Images can be of any dimensions.



Backend: Image upload section



Backend: Features page (Connections)

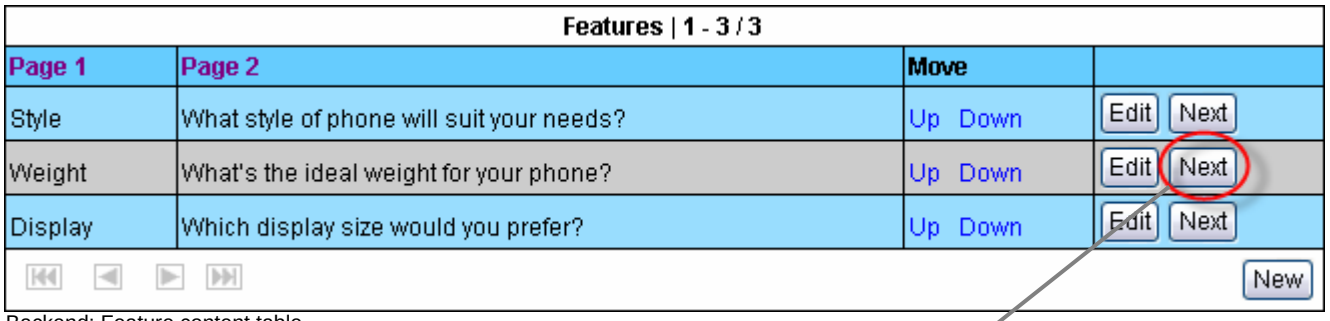


Frontend: SbS Page 1

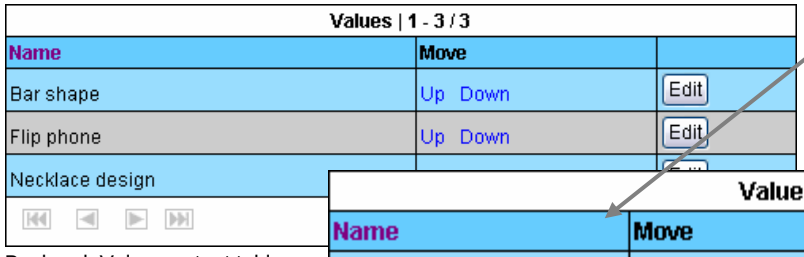
Frontend: SbS page 2 (images not in demo)

4.4.6 Step 4 – Values

The final step is to enter the Values for each Feature (the answering options to the questions). To get to the Values section you need to navigate through each of the three previous steps. Firstly click next on the Main question, then click next on the Category of choice and finally click next beside the Feature (question). The Value content table will open. Note: Add all possible values based on your product specifications. In the example below you will see that every weight is entered for all the mobile phones. When you have set up a min-max question, the values will serve as range of answers in a drop down menu. By bringing them into a reasonable order, you make the range question work properly.

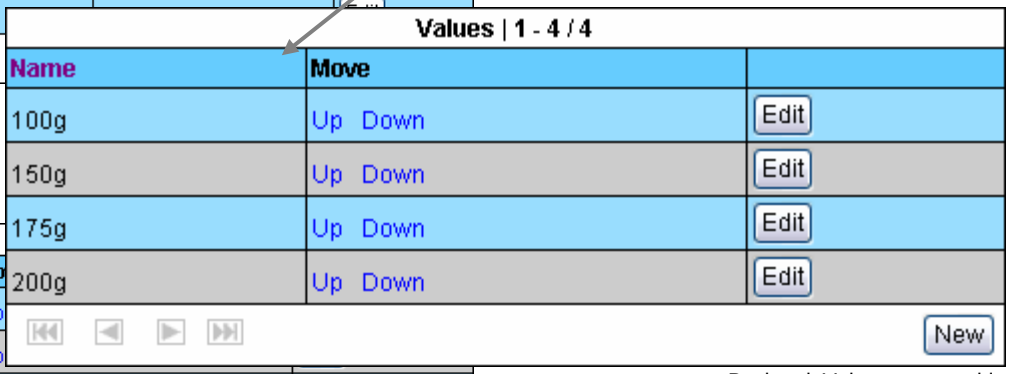


Backend: Feature content table

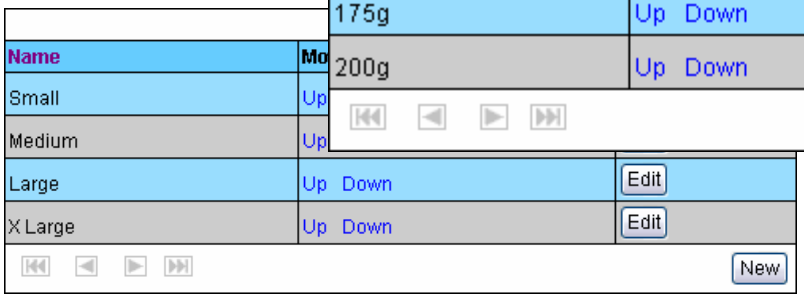


Backend: Value content table (Style Feature)

Click next near the Feature and question to enter the Values (answers)



Backend: Value content table (Weight Feature)



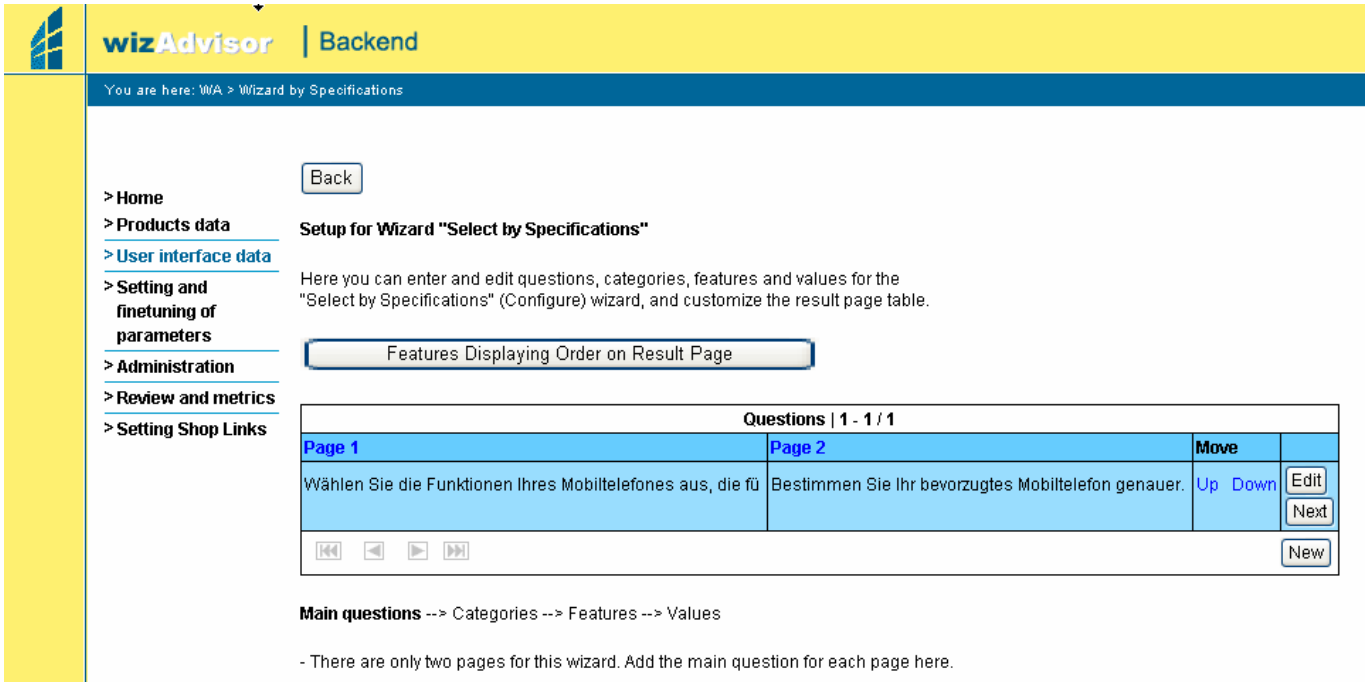
Backend: Value content table (Display Feature)

Enter values for all existing type of features within your product portfolio.

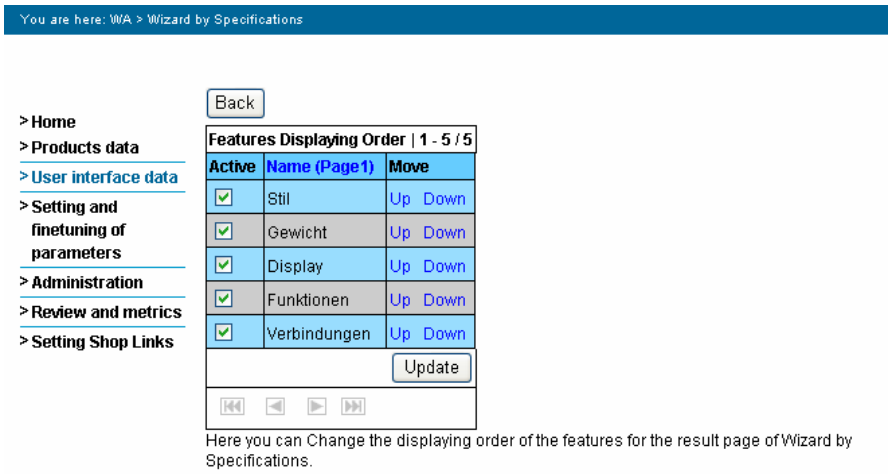
Note: The values entered here will be as a next step linked to products and will show up in the product description. So do not write values like "I don´t care", because you would get phones with the feature "I don´t care" in their features list.
This is setup this way to avoid double entries. But when you want to have entries here like "I don´t care", then you can set the feature value invisible (see page 39) and enter the actual features than as "topics" (see page 41).

4.5 How to display features on result pages

In order to change the order of feature list on result pages and product pages, select the button “Features Displaying Order on Result Page”, which you find on top of the select-by-specification wizard as shown below:



Now you can change the order by moving items up or down. By checking the “active”-Box, you decide if the feature should be displayed at all. When you deactivate it, it will still be used as in the selection process, but not for product description.

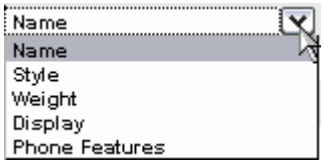


4.6 Results

The number of products shown on the results pages depends upon the choices that the user made and how your products are configured. In this Select by Specification wizard all products that match the required specifications are displayed.

Please note that you cannot test this wizard until you have entered products and defined their Values and Features. To add products read on page 44, for more information about setting up products for the Select by Specifications wizard read page 50.

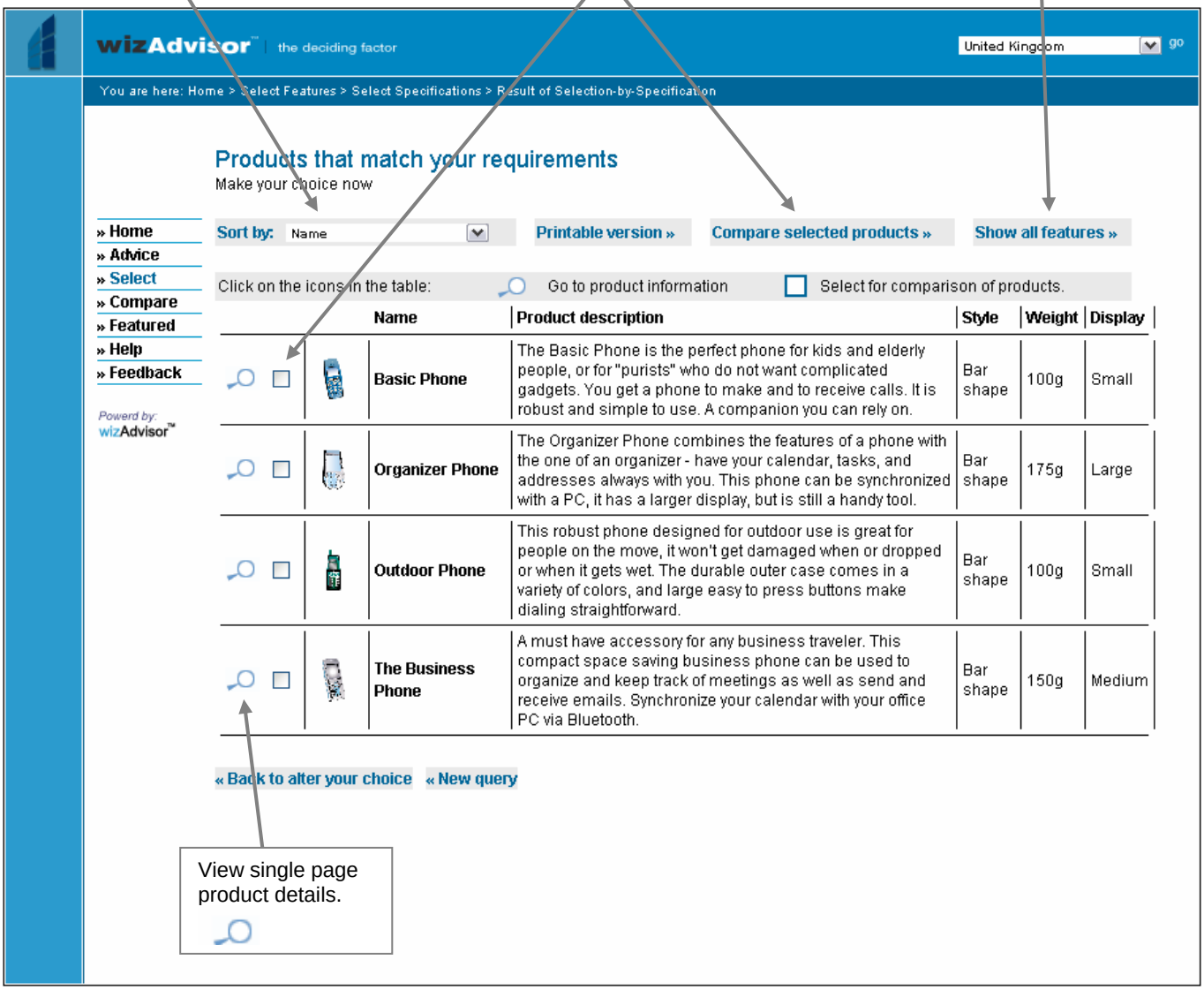
Sort:
Users can sort the results simply by name or by features



Compare:
Users can select products from this results page to get a comparison view of them.

Show all features:

The table will be expanded to include all product information.

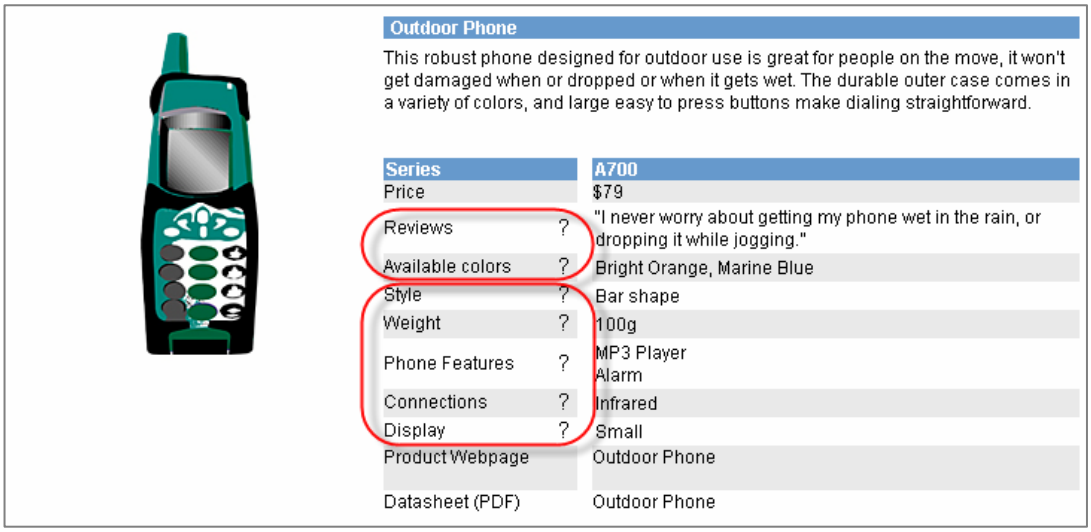


Frontend: Select by Specifications results page

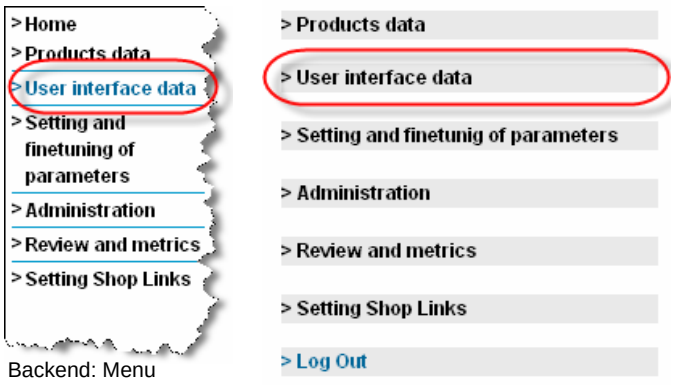
5 Topics

“Topics” are set up to define fields for product descriptions, which are all structured the same way. You define first the type of topic (step 1 and 2 as described below). When this is done, on all product pages in the backend additional content fields will appear (for all languages), where you could fill in product specific features or elements per topic. These are simple text fields. Information entered as topics will not take part in the selection and advisor process. So use topics for additional information which is not relevant for search. Or use topics when you just set up the select-by-usage wizard to present product information which otherwise would not be available for users.
The Topics will be displayed on all result pages of the wizards (select-by-usage and select-by-specification wizard), and in comparison and product show view.

In the image below you will see that topics and specifications are integrated together on the frontend. On the product details page for the Outdoor Phone you can see that there are two topics (Reviews and Available colors) and five specifications (Style / Weight / Phone Features / Connections / Display).
You should decide which wizards you will be using and the structure of each one (Questions / Answers) before adding topics. This limits duplication, you will not need to create so many topics because the information would already have been added for specifications (see page 26 for more details).

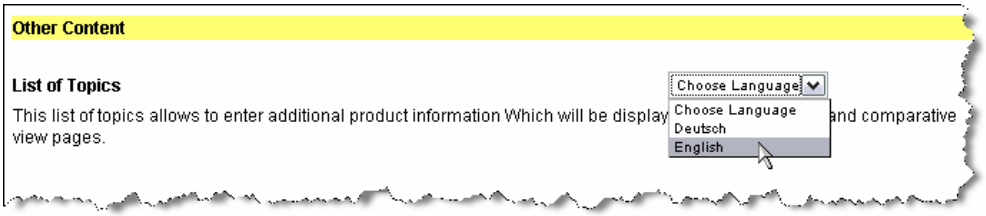


5.1 Finding section in backend



Backend: Menu

Backend: User interface data

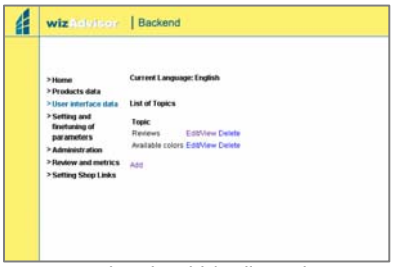


From the main menu, navigate to the User interface data page. Under the Other Content heading you will find List of Topics. From the drop down box select a language.

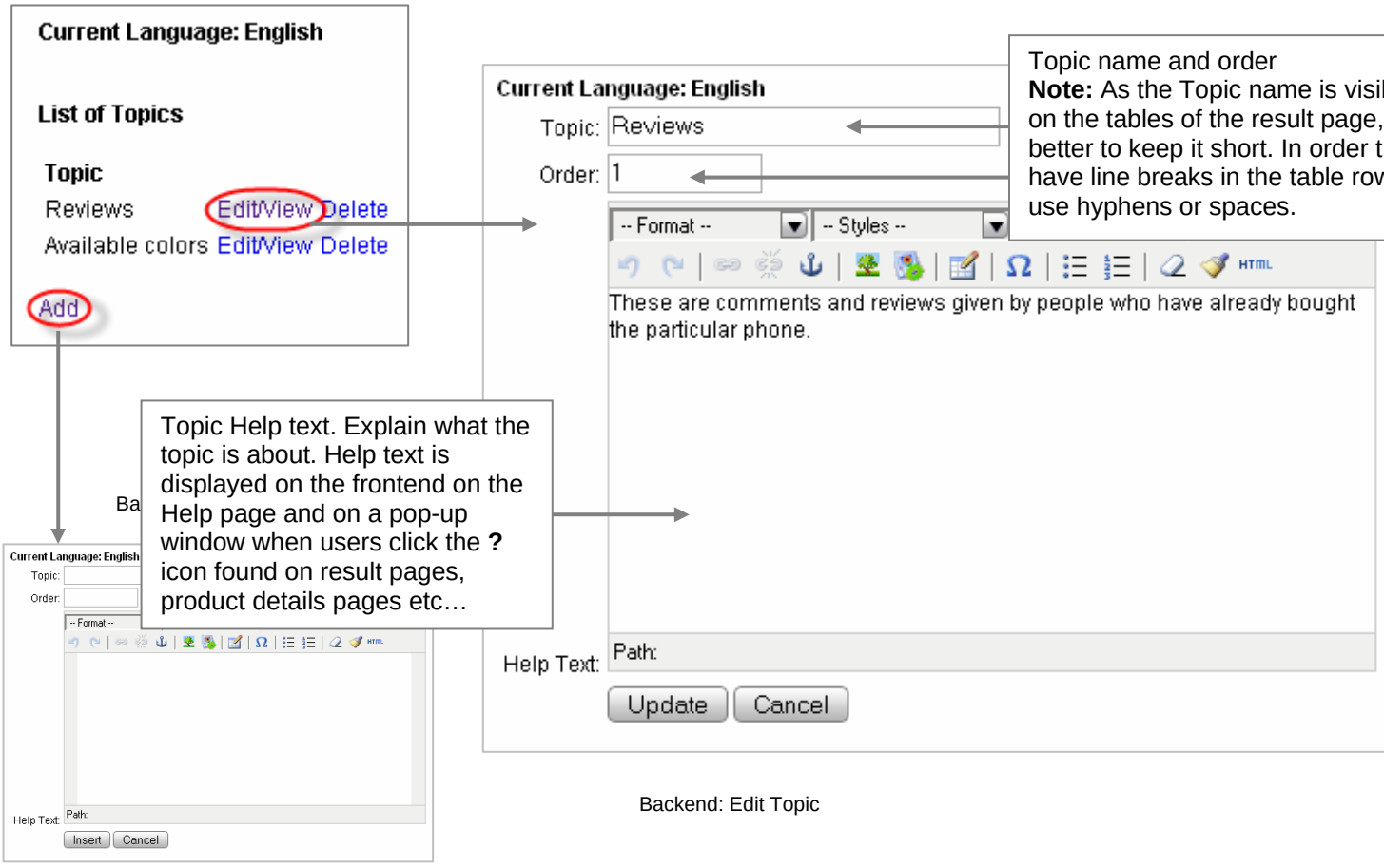
5.2 Editing Topics

On the next page you will see a list of the current Topics. You can Add new ones, Edit/View current ones or Delete.

Note: If you delete topics, all the product information that has been added will also be deleted.



Backend: Add / Edit Topics



Backend: Edit Topic

Backend: Add Topic

6 Products

6.1 Overview

“Products” are the items users are looking for, and from which the suitable ones will be shown on the result pages of the wizards. The term “product” could be replaced by other elements for which you want to set up a virtual advisor: Services, destinations, persons in charge, bits of information, license types etc.

It is important to decide which wizards you will be using, you can choose to have either one or both (Select by Usage / Select by Specifications). Product content is shared by both wizards, as well as by the comparison- and product show module.

Once all product content is entered, configuration for the products is required. For the select by usage wizard, this is done by giving scores depending for needs/usages/capabilities. For the select by specifications wizard this is done be assigning the relevant features to a product. This chapter will guide you through the steps for entering new products using the Fun phone-product of our demo as an example.

In this chapter you will learn how to:

- Add / Edit products
- Upload product images
- Upload product datasheets (PDFs)
- Configure product scores

Before entering products you should set up your wizards, select by usage (page 8) and/or select by specifications (page 26).

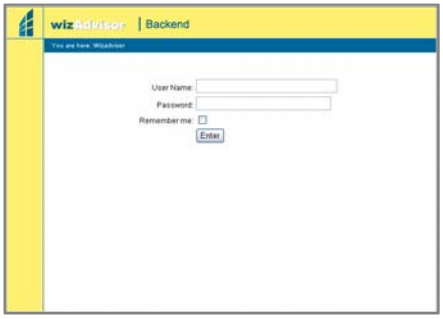
6.2 Add new product

There are three main elements when entering new products.

- Consistent data
  (Same for each product for different languages and countries, if you have an international set up)
  - Images
  - Grouping
  - Upsell product
  - Product ID number
  - Logo/Icon-Image
  - Active or Inactive overall
  - Configuration: giving scores
    - For select by usage wizard
    - For select by specifications wizard
- Language specific data
  (Will appear for all countries which have the same language. I.e. for Germany and Austria, you need to enter this only one time)
  - Description, Topics, Upsell marketing sentence, Fact Sheets/PDF

  Country specific data
  - Product name, Price, Order Number, Weblink, active/inactive per country

6.2.1 Finding section in backend

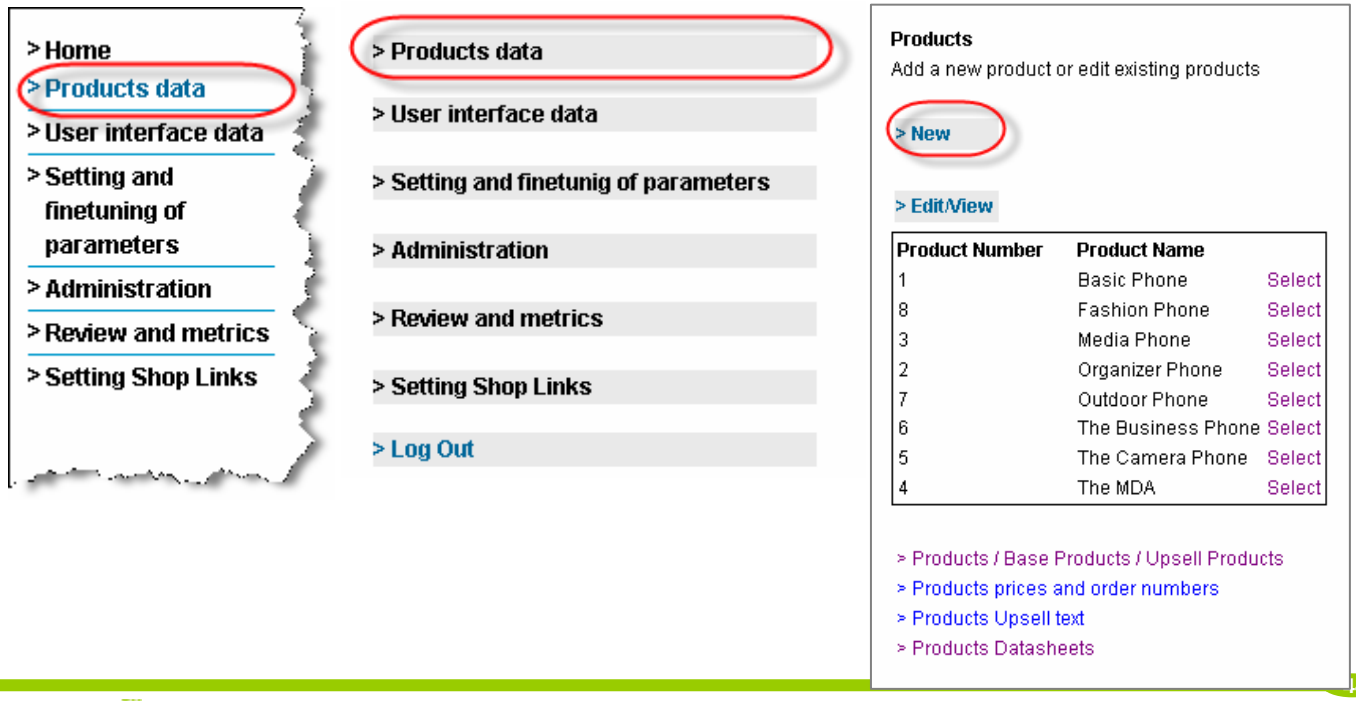


Backend: Login

Backend: Start page

Backend: Products data

Go to the Products data page from the main menu. Here you will see a list of all the current products in the mobile phone demo. When adding your own products, create new ones. The current mobile phone demo products will serve as an example, and can easily be deleted.



Backend: Products data

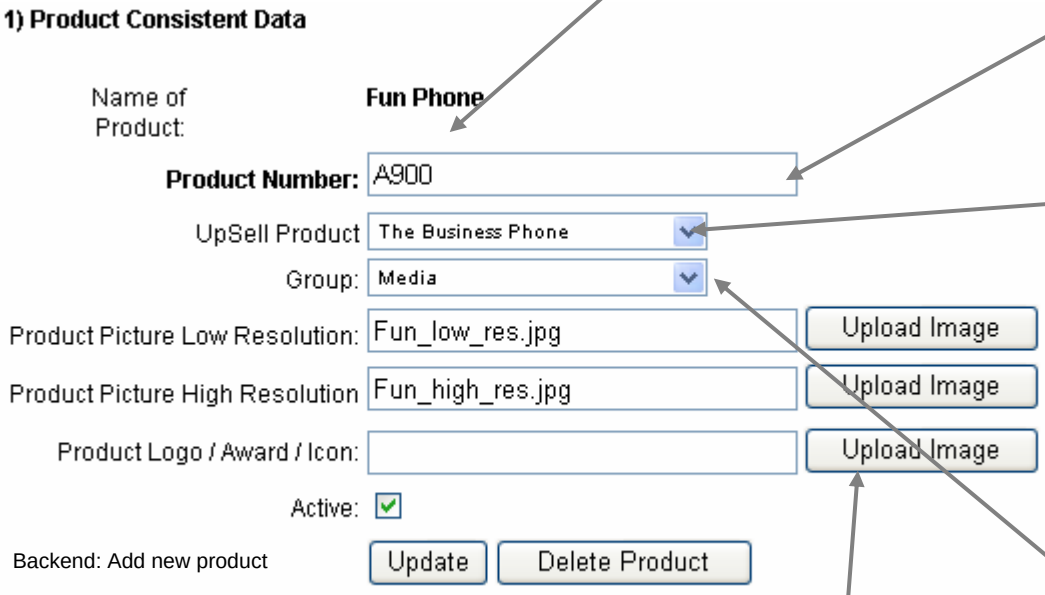
6.2.2 Step 1 – Add product consistent data

Product Consistent Data includes the Product name, ID number, upsell product, group and image. This information is the same for one product regardless of language or country. The number given here is a unique identifier .(important for example for creating interfaces for automatic upload).

To proceed to the next step you only need to enter a product Name and Number. The rest can be filled at any time.

Add the product name here. This name can be changed for all countries, but the name entered in the first language will be used as reference here. See page 69 to find out which is the first language. In the mobile phone demo it is ”English.”

This must be a unique number, you can simply enter 1,2,3,4... or use your product number.



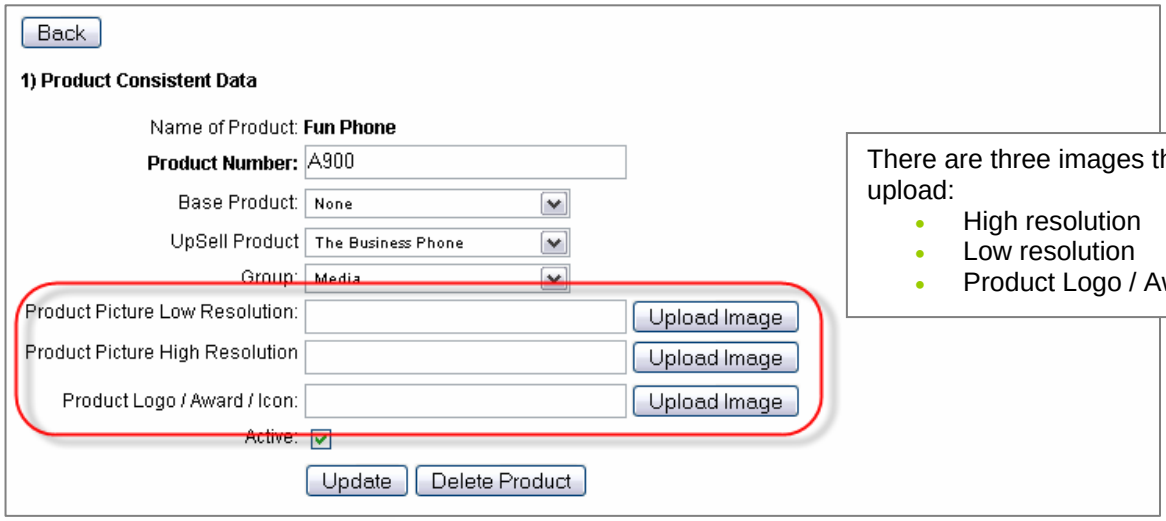
The Upsell/Cross-Sell F marketing feature of the Usage Wizard (see pag information). On the res only the product which f best are presented, but cross-sell-Option. (In th “Powerful alternative”). just chose a higher valu from the drop down list, want to be presented in the product here is pres choice.

Click Submit New, to add the new product. You will then be redirected to the main product overview page.

See page 45 for information on uploading images.

Groups: Products can be grouped into various categories, enabling users to browse or compare products more easily. The Feature and Compare sections on the mol phone demo illustrate the use of groups. To create the list of group see page 69.

6.2.2.1 Upload images



There are three images that you can upload:

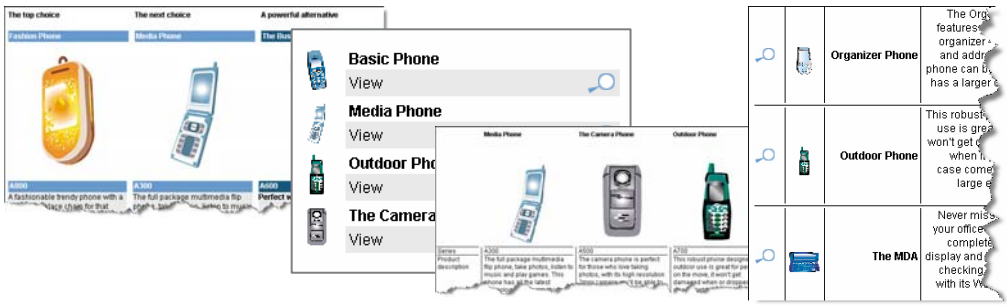
- High resolution
- Low resolution
- Product Logo / Award / Icon

Backend: Main product overview page

The High Resolution image is shown on the frontend on the “Featured” are, the product details page, all other instances use the low resolution image. When a user clicks on a low res image, a pop up will show the larger / higher resolution image. **Note**: you can also use this 2 image options to show the product from 2 angles, but uploading different pictures.

Individual Product Page

Low Resolution

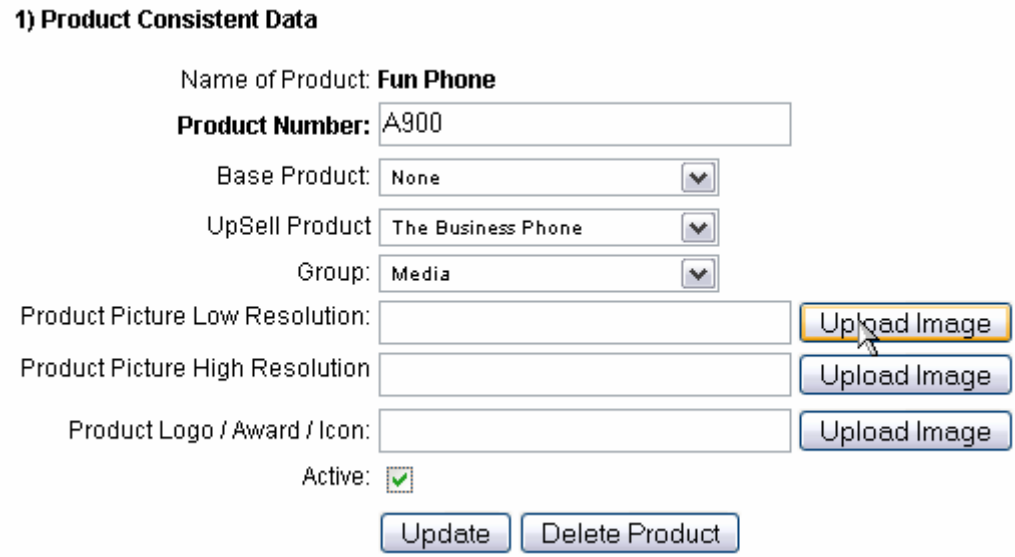


Wizard results
Product lists
Groups
Printable versions
Compare

Logo / Icon

Appears within the description of the product, everywhere the description is displayed. This feature can be used to upload brand logos for example.

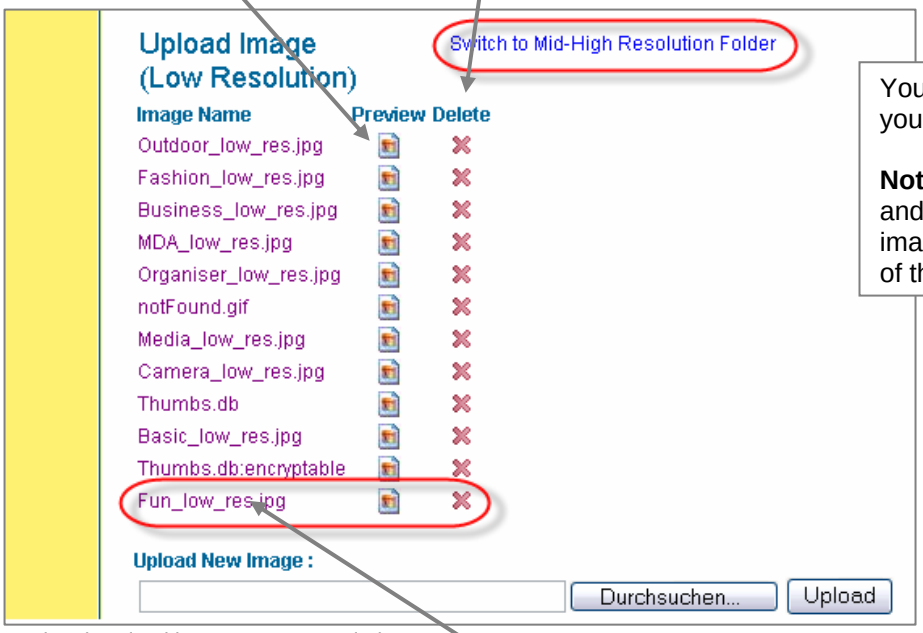
How to upload the images:



Backend: Main product overview page

Click this icon to preview the image

Delete image by clicking here.



You can upload images directly from your local computer.

Note: Switch between the High res and Low res folders when uploading images by clicking on the link on top of the window.

Backend: Upload images – pop up window

Click on the image name to add an image which is already in the folder to the product. Alternatively, you can type the image name into the entry field.

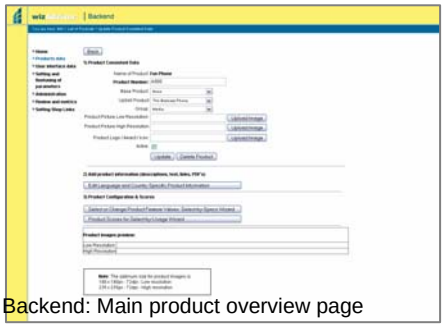
6.2.3

Once you have uploaded your images you will see a preview on the main product overview page.

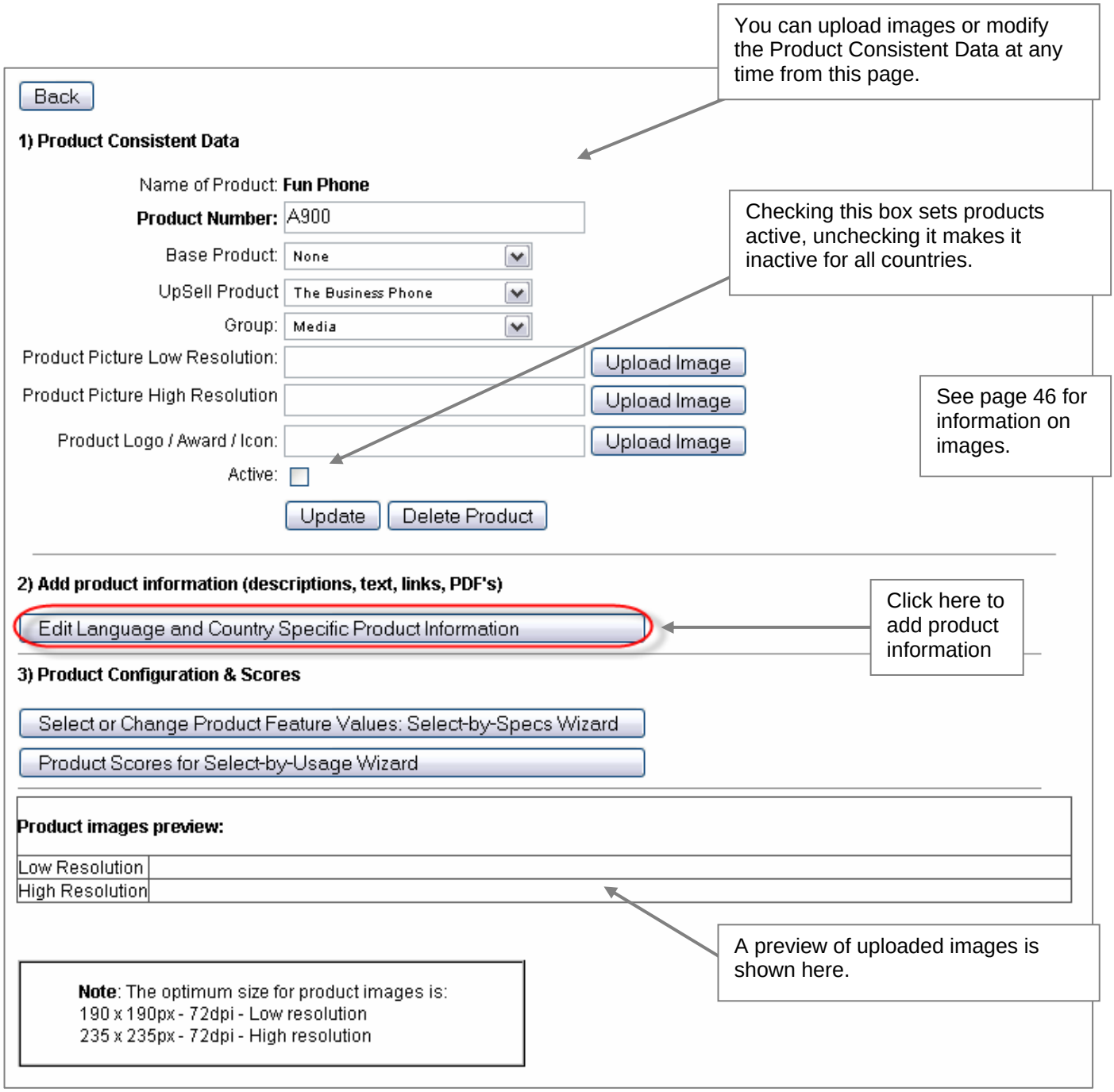
Backend: Main product overview page

Step 2 – Add product information

The next step is to add product information such as descriptions, feature texts, links, price etc… From the main product overview page click on: Edit Language and Country Specific Product Information. Once you have added your products you can define additional countries and languages if needed, and then make translations for all content (Questions / Answers / Products) language by language.



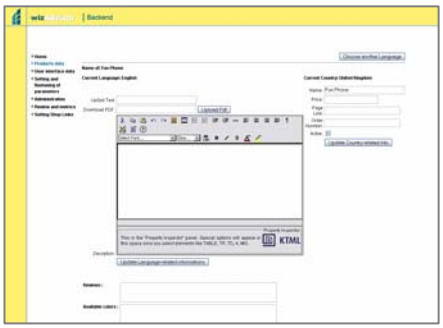
Backend: Main product overview page



Backend: Main product overview page

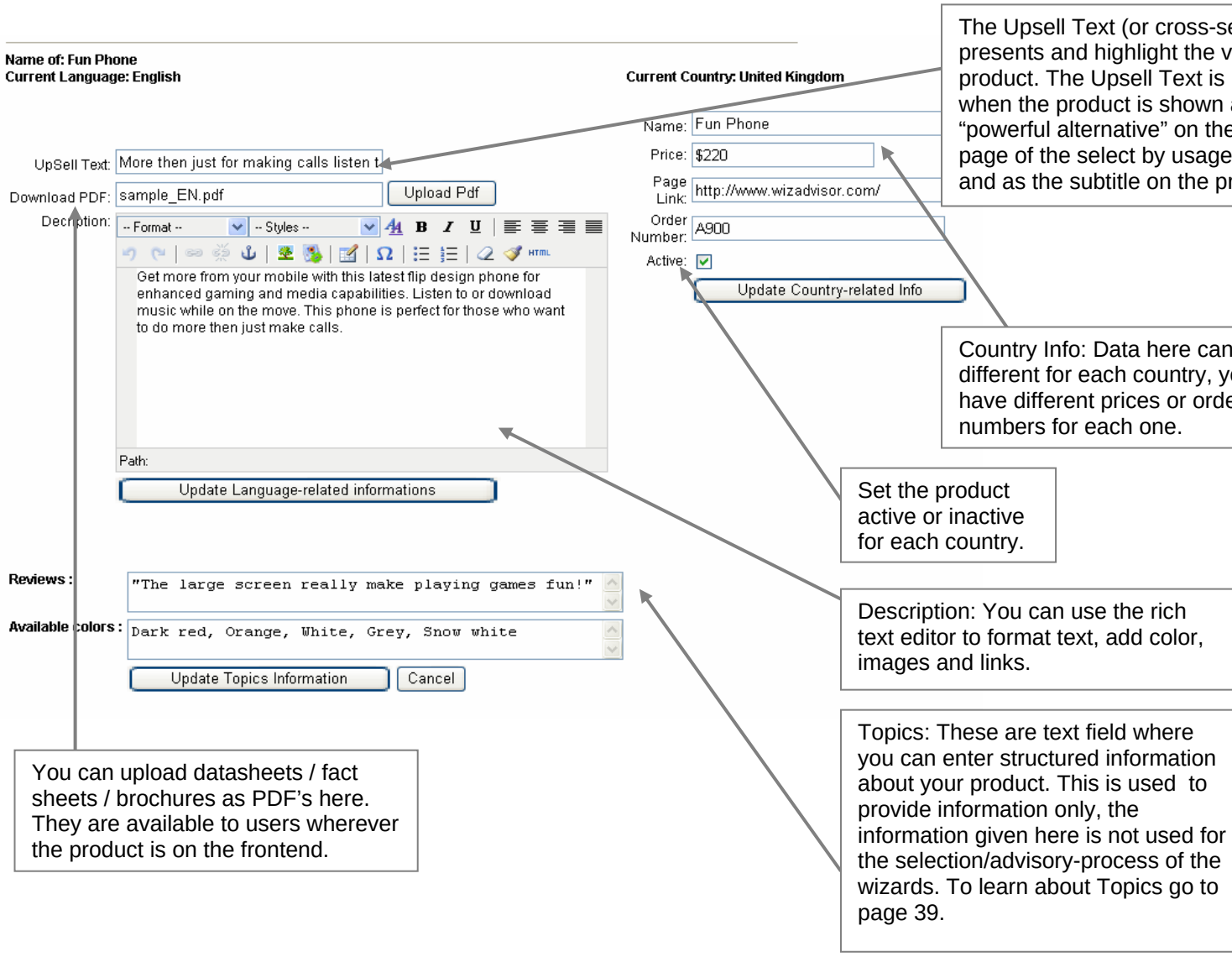
Next, select the Country for which you want to enter new content for. We suggest that you start with just one language (Language ID = 1) and country always use the same language and country for the first set up.

Backend: Choose country



Backend: Add product information page

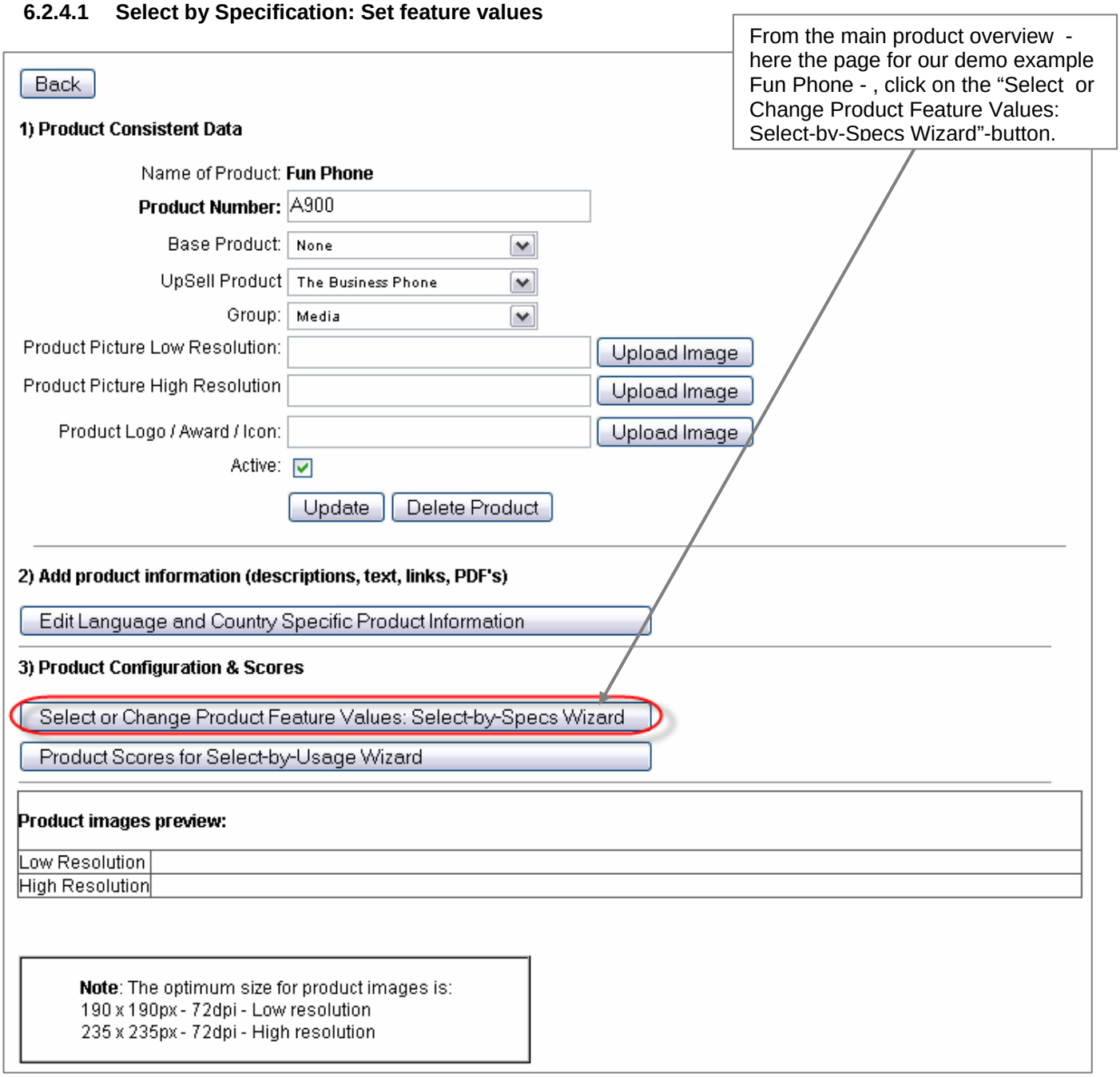
A single page form will open on the next page where you will find various forms and fields for entering different content. The illustration below describes what information goes where.



6.2.4 Step 3 – Product configuration and scores per product

The initial set up of each new product does not require a score set up to be done at the same time - you can add all scores for all products together later on. Configuring products together enables better positioning. Please note that products will not show up in the select by usage or select by specification wizards until scores have been set. For detailed help on how to configure products see page 56.

6.2.4.1 Select by Specification: Set feature values



Backend: Main product overview page

A form opens on the next page, where you see all possible values:

Selected Product: Fun Phone

Back to Product Page

Please select the desired features for your product:

Design

What style of phone will suit your needs?
- ○ Bar shape
- ◉ Flip phone
- ○ Necklace design
- ○ None

What's the ideal weight for your phone?
- ○ 100g
- ○ 150g
- ○ 175g
- ○ 200g
- ○ None

Which display size would you prefer?
- ○ Small
- ○ Medium
- ○ Large
- ○ X Large
- ○ None

Functionality

What features should your new phone include?
- ☐ Alarm
- ☐ Camera
- ☐ Email
- ☐ Games
- ☐ Organizer
- ☐ MP3 Player
- ☐ Voice recorder

Select the connectivity capabilities that you require:
- ☐ Bluetooth
- ☐ Infrared
- ☐ WLAN

Backend: Scores for select by specification

You read here the same questions as they appear on the frontend, plus all available values. Tick here the correct values of your product.

When a value is missing, go back to the select-by-specs wizard setup (see on page 38) and enter additional values there. The values will then show up on this list here.

Radio Boxes mean you can select only one value, Check boxes mean you can select more than one per product.

Please select the desired features for your product:

Design

What style of phone will suit your needs? ?
- ○ Bar shape
- ○ Flip phone
- ○ Necklace design

What's the ideal weight for your phone? ?
- ○ Min weight 100g
- Max weight 200g
- ○ Fixed 100g

Which display size would you prefer? ?
- ○ Smallest Small
- Largest X Large
- ○ Fixed Small

Functionality

What features should your new phone include? ?
- ☐ Alarm
- ☐ Camera
- ☐ Email
- ☐ Games
- ☐ Organizer
- ☐ MP3 Player
- ☐ Voice recorder

Select the connectivity capabilities that you require: ?
- ☐ Bluetooth
- ☐ Infrared
- ☐ WLAN

You will notice that a single choice option on the backend does not necessarily mean a single choice on the front. Its possible to define different types for the front and backend of each question. Read more on page 33.

Frontend: Select by specification questions

6.2.4.2 Select by Usage: Scores setting

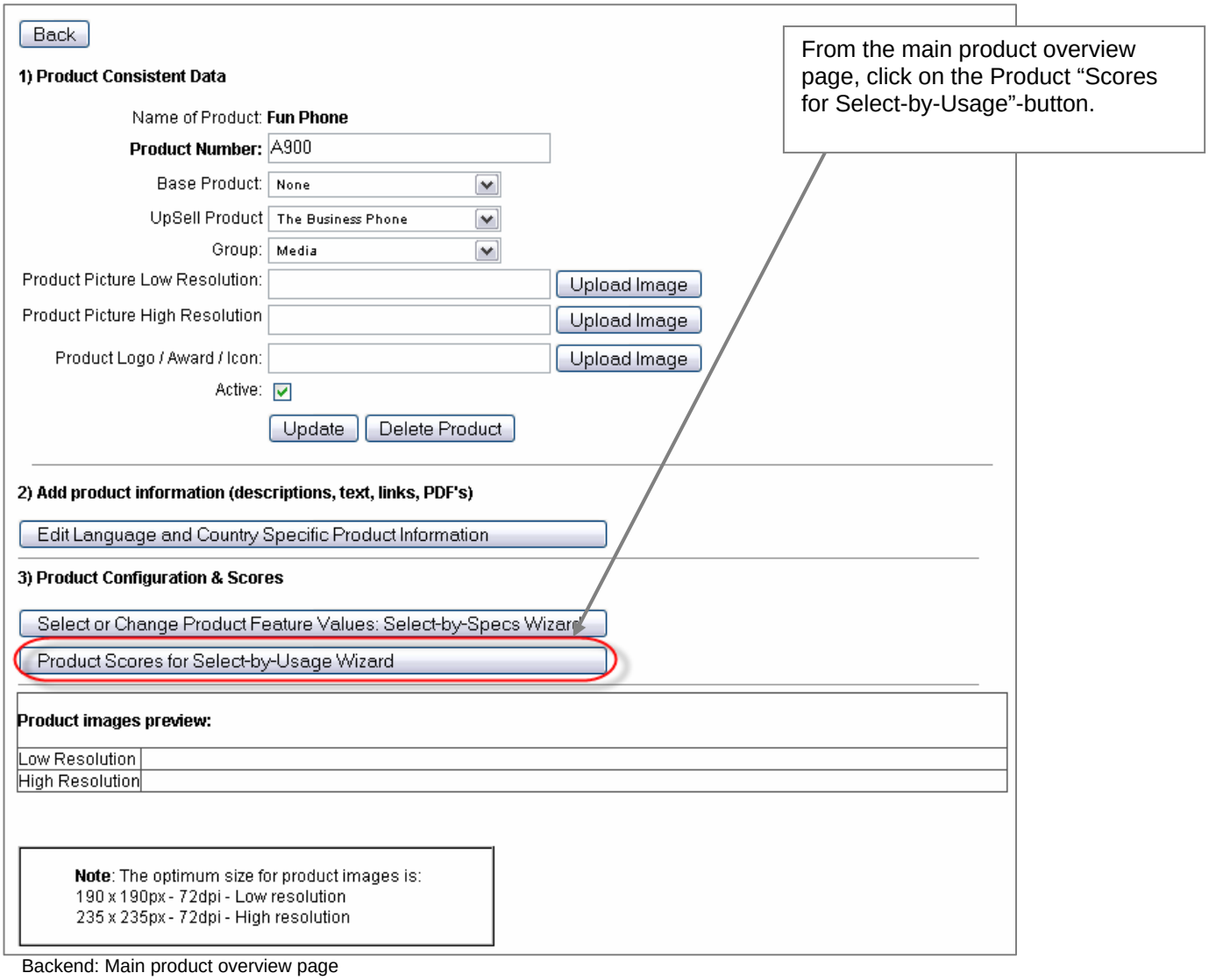
The select-by-usage wizard algorithm uses scores to find the best suitable products. There are a few simple rules to deal with the configuration with scores:

1. The more scores a product has, the better it is suited to fulfill a certain need (answering option in the frontend).
2. The score of “0” eliminates a product from the selection process when a user has ticked a certain need as relevant. Means: this product does not fulfill this need at all.
3. You can choose you the most suitable scale: i.e. 0 to 5, 0 to 10, or 0 to 100. The more products you have, or the more precise you want the wizard to work, the larger the scale should be. A simple scale from 0-5 works already well for many cases. When using this wizard just to ask if certain features are required, a 0-1 scale might be enough (Yes – the product has it: 1. No – the product does not have it: 0)).
4. Stay consistent in assigning scores: use the same scale within one question block (set of answering options). Write rules which describe the methodology of assigning scores for each need (answering option).

Optional: you achieve the best results when ranking the products all together in respect to individual needs (best one, second best, …, down to: hardly but still suitable, invalid), and assigning scores to them using an average distribution curve. Note: this is not necessary for a good result, but when you have a fix set of products which you need to setup only once, you might consider this approach for maximum quality of result.

For assigning product scores, you can either do this per product (entry form in the product area), or for all products together in one matrix (to be found in “Review and Fine-tuning of Parameters”).

Entry Form in the Product Area:



Backend: Main product overview page

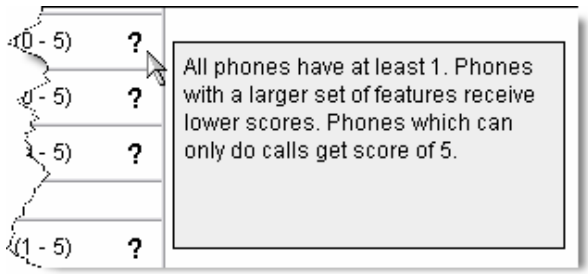
Selected Product: Fun Phone

Back to Product Page

Question / Answer	Score	Compare with: none	Rules to assign scores
What do you need from your new phone?			
Standard usage			(0 - 5) ?
More multimedia capabilities			(0 - 5) ?
Business solutions			(0 - 5) ?
What do you want to do with your phone?			
Make calls			(1 - 5) ?
Send messages			(1 - 5) ?
Take photos			(0 - 5) ?
Listen to music			(0 - 5) ?
Play games			(0 - 5) ?
Organize meeting/appointments			(0 - 5) ?
Use my phone to work away from the office			(0 - 5) ?
Does money matter to you?			
Price			(1 - 10) ?
What's more important?			
Weight			(0 - 5) ?
Display size			(0 - 5) ?
Style			(1 - 5) ?
Inactive Questions			
Which color phone would you like?			
Red			(0 - 10) ?
Blue			(0 - 10) ?
Green			(0 - 10) ?
	Update Scores Table		

Backend: Single product scores

Hovering over the ? next to each question displays the question rule that you can enter as a reference. Every time you configure products you can refer to this, ensuring a consistent approach to product configuration. Read more on page 57



Use the drop box to view existing scores for another product for easy comparison.

Question / Answer	Score	Compare with: Media Phone	Rules to assign scores
What do you need from your new phone?			
Standard usage		0	(0 - 5) ?
More multimedia capabilities		5	(0 - 5) ?
Business solutions		2	(0 - 5) ?
What do you want to do with your phone?			

Take the following approach: Imagine, a customer would ask a consultant / shop assistant that he would like to have a product (i.e. mobile phone) for one need / one usage (i.e. "for standard usage"). Imagine, this customer would not provide you any other information. How likely would the consultant / shop assistant then recommend the product in question? I.e. the Fun Phone allows basic usage, but has probably too much multimedia in it for someone who just wants standard usage. So the consultant would give it a low score of 1 or 2.

Note: For each score, think only about one single criteria. Other criteria (i.e. Price) will be asked on its own later on.

Scores can be set as high as needed. For the mobile phone demo the maximum score is 10. For some questions it is only 5.

A product scores 0 if the feature in question is not available or a need is not fulfilled at all – The Fun Phone does not have a camera or organizer, so it would score 0 here.

Quite often you will have questions where all products score at least 1 point (i.e. Style or Price). Both upper and lower limits can be set to avoid errors.

(0 - 10) Lower limit = 0 Upper limit = 10
(1 - 5) Lower limit = 1 Upper limit = 5

Also 1 score (lowest possible value) is appropriate when you do not want to eliminate a product from selection, although it is only to a low degree valid for a certain need.

Read page 49 for help on how to set limits.

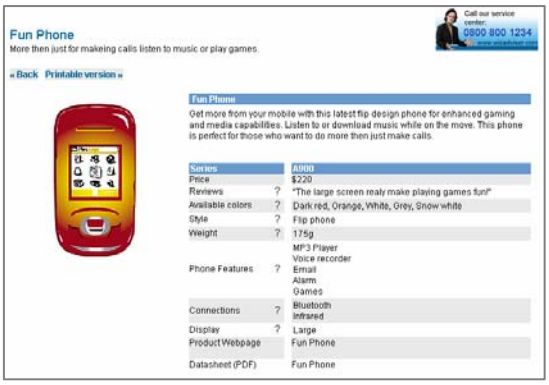
6.2.5 Step 4 – Review

6.2.5.1 Review product content on the frontend

Go to the Featured page from the main menu and select the product which you want to review (i.e. our example: Fun Phone). On the Fun Phone details page, you will see all information about the product. So you can use this view for review how it is displayed on the frontend.

Frontend: Menu

Frontend: Featured page



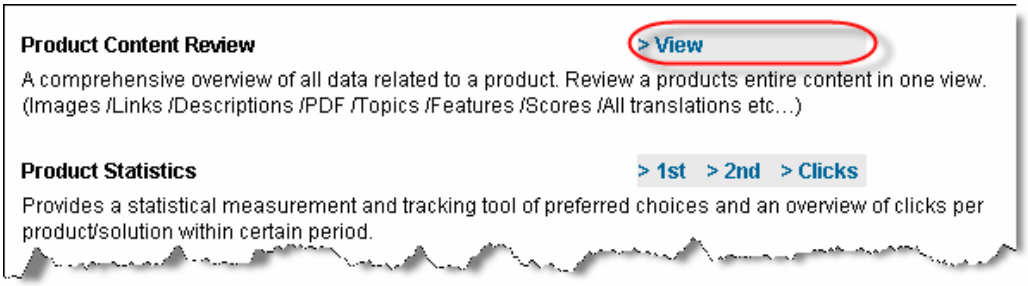
Frontend: Fun Phone details page

6.2.5.2 Review product content in the backend

In the backend, there is an area to review ALL product content at once (including language version, scores, active per country etc.). This page serves allow a product owner (the person or entity in charge, i.e. a product manager) to see and sign off all content.

From the main menu select Review and metrics, then click View under the Product Content Review section. The next page will display a list of products; choose the one which you want to review.

Backend: Menu



Backend: Review and metrics page

Select Product:

Product Name	
Basic Phone	Select
Fashion Phone	Select
Fun Phone	Select
Media Phone	Select
Organizer Phone	Select
Outdoor Phone	Select
The Business Phone	Select
The Camera Phone	Select
The MDA	Select

Backend: Select product for review

wizAdvisor | Backend

You are here: WA > List of Products > Sign-off Document

- > Home
- > Products data
- > User interface data
- > Setting and finetuning of parameters
- > Administration
- > Review and metrics
- > Setting Shop Links

ProductConsistent Data

Product Name:	Fun Phone
Upsell Product:	Das Business-Handy

Product Language-dependent Data

	Upsell Text:	Product Description:
Deutsch	More then just for makeing calls listen to music or play games. (Deutsch)	(Deutsch)
English	More then just for making calls listen to music or play games.	Get more from your mobile with this latest flip design phone for enhanced gaming and media capabilities. Listen to or download music while on the move. This phone is perfect for those who want to do more then just make calls.

Product Country-dependent Data

Deutschland	**Product Name:**	**Order Number:**	**Active:**	**Datasheet PDF:**
	Fun Phone (Deutschland)	A900 (Deutschland)	Yes	sample_EN.pdf (Deutsch)
	Price:	**Product Page Link:**		
	$220 (Deutschland)	http://www.wizadvisor.com/ (Deutschland)		
United Kingdom	**Product Name:**	**Order Number:**	**Active:**	**Datasheet PDF:**
	Fun Phone	A900	Yes	sample_EN.pdf
	Price:	**Product Page Link:**		
	$220	http://www.wizadvisor.com/		

Attributes

Question / Answer	Score
What do you need from your new phone?	
Standard usage	
More multimedia capabilities	
Business solutions	
What do you want to do with your phone?	
Make calls	
Send messages	
Take photos	
Listen to music	
Play games	
Organize meeting/appointments	
Use my phone to work away from the office	
Does money matter to you?	
Price	
What's more important?	
Weight	
Display size	
Style	
Which color phone would you like?	
Red	
Blue	
Green	

Topic - Deutsch

Reviews: "The large screen realy make playing games fun!" (Deutsch)
Available colors : Dark red, Orange, White, Grey, Snow white (Deutsch)

Topic - English

Reviews: "The large screen really make playing games fun!"
Available colors : Dark red, Orange, White, Grey, Snow white

Features - Deutschland

Stil Aufklappbares Handy
Gewicht 175g
Funktionen MP3 Player, Diktier-Funktion, E-Mail, Alarm, Spiele
Verbindungen Bluetooth, Infrarot
Display Groß

Features - United Kingdom

Style Flip phone
Weight 175g
Phone Features MP3 Player, Voice recorder, Email, Alarm, Games
Connections Bluetooth, Infrared
Display Large

The full set of product information is displayed here.

Product name / Upsell product

Low / High resolution image

Product upsell text and description – for every language

Country dependant data + PDF
- Active (Set product active or inactive for each country)
- PDF file name
- Link
- Order number
- Price
- Product name

Scores for select-by-usage wizard

Topics – for all languages. (Structured product information, not used for selection process in the wizards)

Features – for all languages. This is the information that is entered when configuring products for the select-by-specification wizard. See page 22.

Backend: Product content review – Fun Phone

7 Configuration Select-by-Usage – Set rules and assign scores

To train your virtual sales assistant, you need to tell the WizAdvisor how to match customer needs, usage and requirements (select-by-usage wizard, see page 8) with the product or service portfolio. This is done with the configuration process. The product (or service) expert defines here fixed or flexible rules for each customer need (answering options in the wizard's dialogue), and assigns scores for each option and each product. This process does not take too much time, while creating value in making your expert know how available to your customers.

7.1.1 How scores influences the selection process

When a user answers ticks on answering options in the wizard's question, each product collects scores, depending on the amount of scores defined for this product in the backend (= defined in the configuration process). As Weights per question varies, for some questions products gain more or less of their default amount of scores. Products having a "0" for an option ticked by the user, are eliminated from this query.

A result is displayed when there are 2 or less products left (all others are eliminated), or when the final question was reached. On the result page, the products that have the highest total score, based on the users responses, are displayed and presented together with an upsell option.

7.1.2 Overview on configuration steps

The four sections of configuration are:

- User Interface – Select by Usage Wizard: Set rules
  User Interface – Select by Usage Wizard: Question weighting
- Product by product configuration (see page 52)
- Configuration of all products together
- Testing

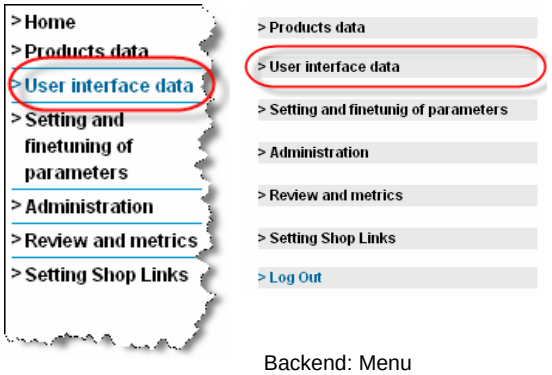
For the initial set up we recommend that you carry out a complete product configuration for all products together.

Then, if and when additional products are entered you can configure products on an individual basis. The Rules-assistance will help maintain consistency and accuracy whilst adding additional products. From time to time it might be worth conducting a full product configuration. For example as new products are added older ones may loose points for subjective elements such as style. Prices also change over time and you may need to tweak scores keeping the tool functioning at the highest level. Only the initial set up requires extra time, future updates of products and scores is a very fast and simple process, using the built in features of the tool to speed things up while still being accurate.

7.1.3 Set rules for the Select by Usage - Wizard

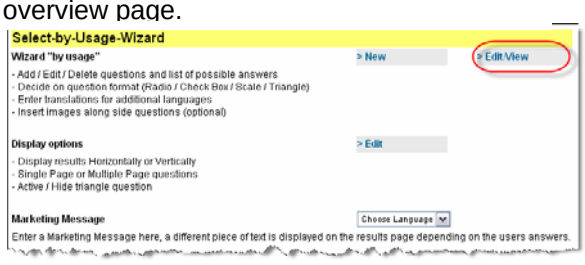
To assist with product configuration, add rules descriptions for each option (for backend use only). The text or rules that you define here, will help to set the scores for each product. Minimum and maximum scores can also be defined, limiting errors when setting scores.

7.1.3.1 Finding the section in the backend



Backend: Menu

From the main menu click on User interface data.
Under the Select-by-Usage-Wizard section click on Edit/View to go to the question overview page.



Backend:
User interface data

Backend: Questions overview

From the Question overview page under the heading Set Rules for Product Configuration, click on Min / max Values and Help Test for Scores per Answer

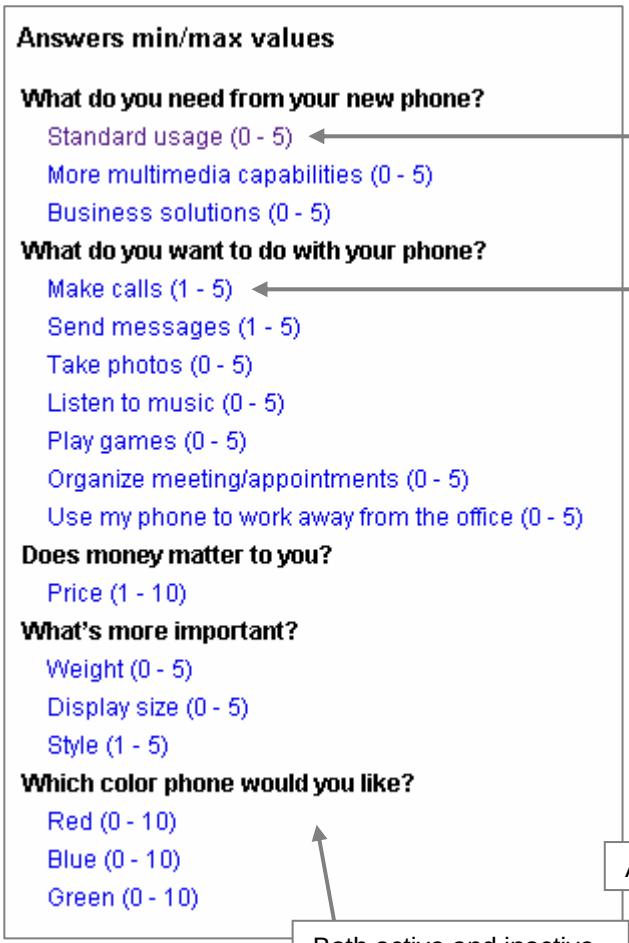
Backend: Questions overview

The next page displays a list of the questions and the current score settings.

7.1.3.2 Choosing the Min / Max values and set rules

In order to assure a consistent configuration for all products, describe the rule for configuration when setting up the select-by-usage wizard. This is a “soft” approach, as rules do not get hard coded, but serve only as guidance for the expert who is making the configuration. This has proved to be for many cases the most efficient way to deal with rules.

- Decide on a scale, for example: 0-1, 0-5, 0-10, 1-10, 1-100, and save the minimum and maximum value.
- Write a rule.
  This can be done by explicitly linking scores to product or service features.
  I.e. Take Photos “5 scores when built in 2 MB camera plus MMS feature;, 4 Scores with built in 2 MB camera; 3 scores with built-in 300 KB camera; 0 scores when no camera.”).
  Or give a more general description:
  I.e. Price “The less the camera costs, the more scores to give.” Depending on actual price range, the expert will decide how to deal with it.



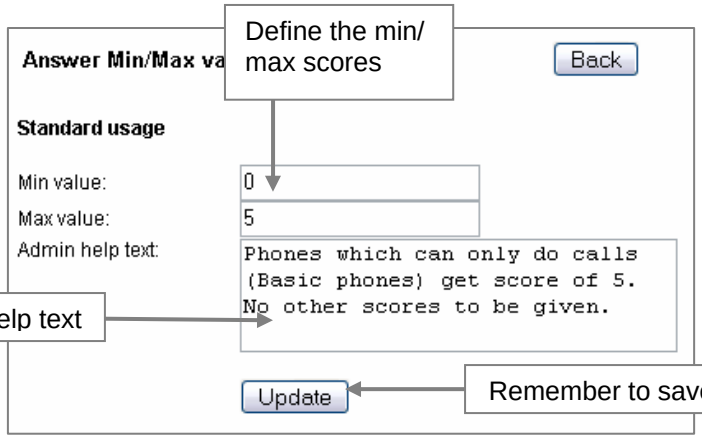
Backend: Set rules and score values

Both active and inactive questions are displayed.

Click on an answer to open a form for defining rules and min / max scores.

A minimum and maximum value is set for each answering option. Means (example): all products must get a score of at least 1, and no more than 5.

Always set scores to same maximum value within each question (for all answering options within one question).



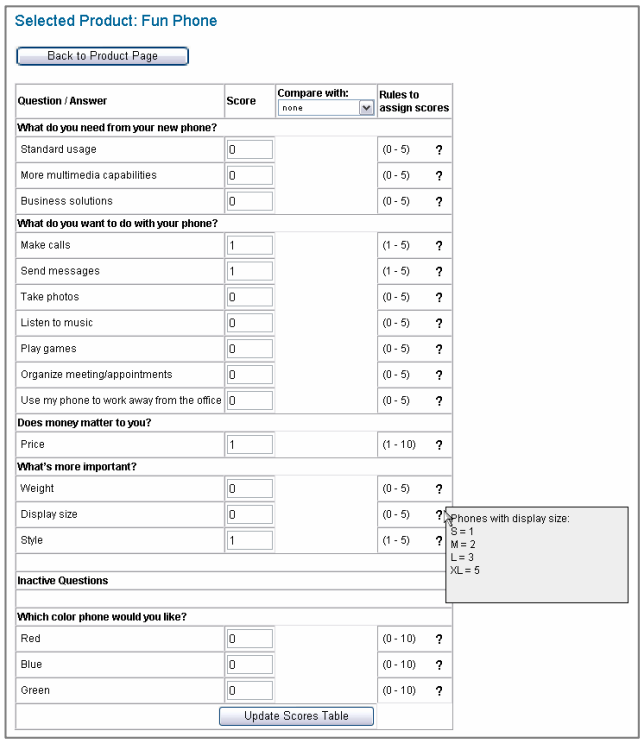
Define the min/ max scores

Add rules help text

Remember to save

Backend: Define rules and set min/max scores

7.1.3.3 How to view rules for product configuration



Backend: Single product score configuration

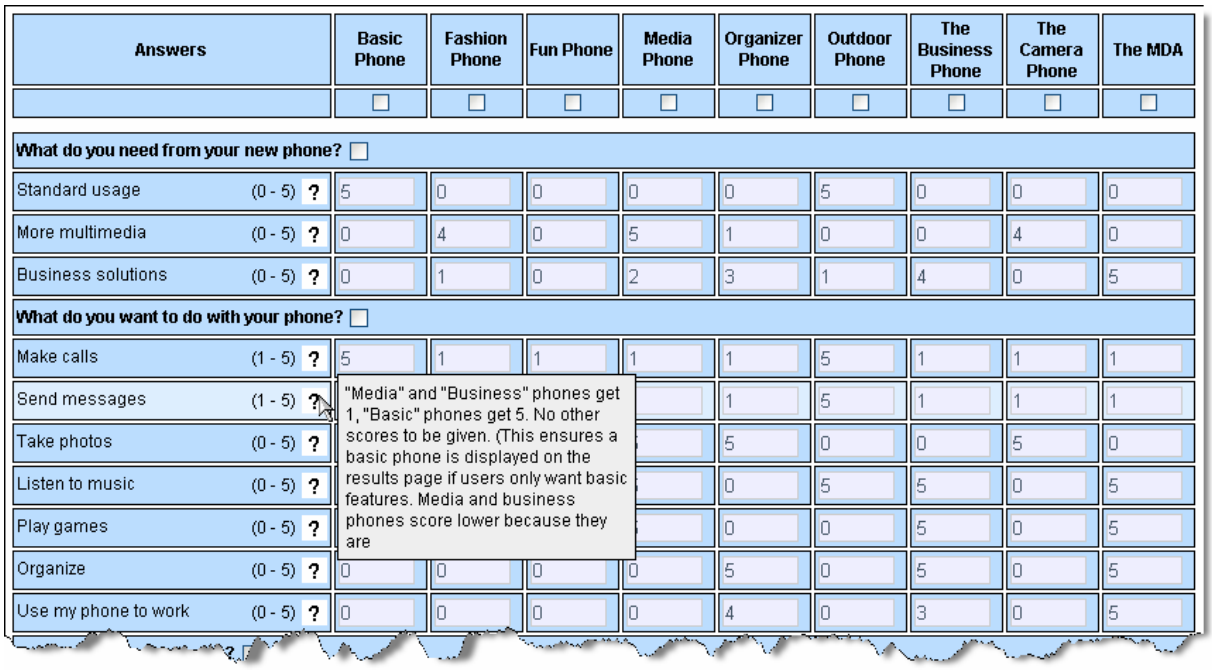
After you have set up questions and answer options, you should have set the rules and min / max values before configuring products. See page 55.

Examples for rules:

Phones which can only do calls (Basic phones) get score of 5. No other scores to be given.

"Media" and "Business" phones get 1, "Basic" phones get 5. No other scores to be given. (This ensures a basic phone is displayed on the results page if users only want basic features. Media and business phones score lower because they are

Add the following figures then half the answer to make a total score for this option.
Organizer = 1
Email = 2
Bluetooth = 3
WLAN = 4



Backend: Full product configuration table

The rule setting feature is of most benefit in the long run. When entering additional products it is vital to stick to the original scoring guidelines – consistency is the key. You can of course change the scoring rules at any time, just remember to apply the new system to all products.

7.1.4 Assign scores for products per product (product page)

This step has already been described in detail above, see page 52for details (product information).

7.1.5 Assign scores for products altogether (matrix)

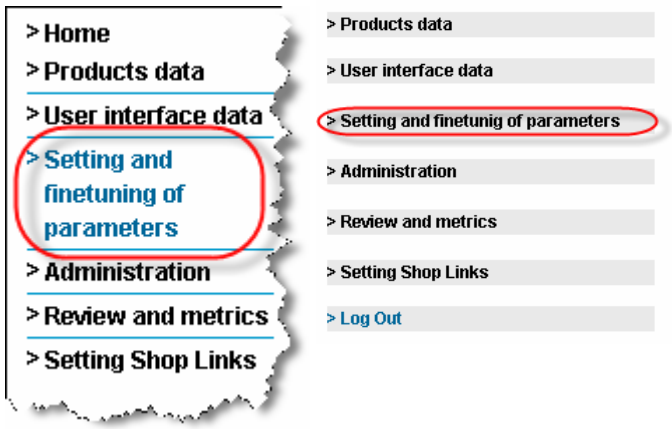
For the initial set up of your WizAdvisor tool, it is recommended to add all questions, answers and products, and then complete a full product configuration. The following pages provide a step by step guide with tips on how to configure your products.

7.1.5.1 Finding the section in the backend

Backend: Login

Backend: Start page

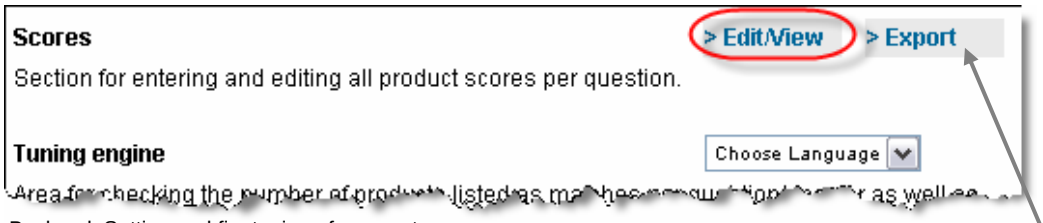
Backend: Setting and finetuning of parameters page



Backend: Menu

Login to the backend. Go to the Setting and finetuning of parameters page from the main menu.

Click on Edit/View under the Scores section to open the full product page configuration table.



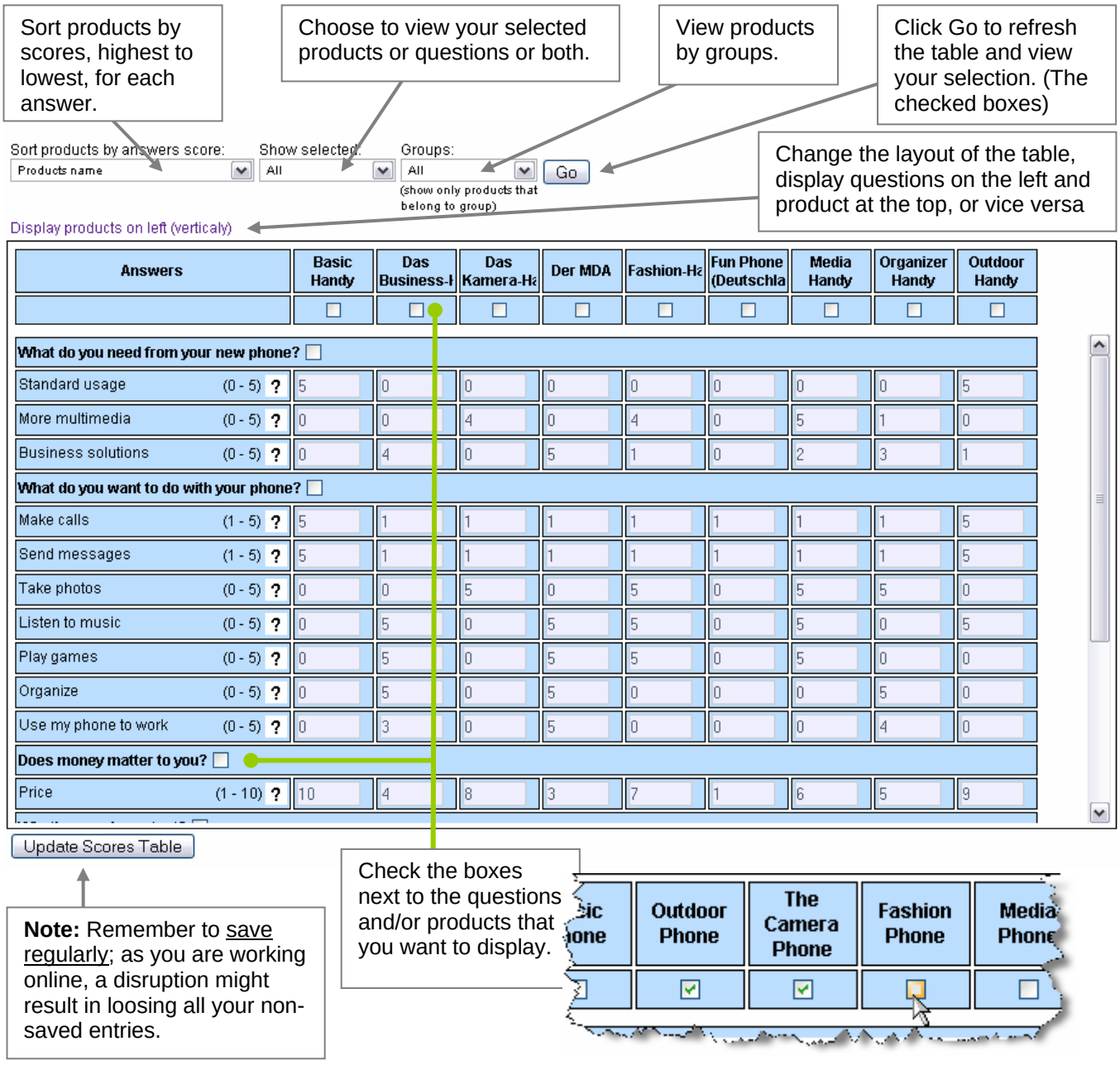
Backend: Setting and finetuning of parameters page

You can export the scores and save them on a spreadsheet, archiving data, or simply to create a back up.

7.1.6 Set scores with the help of the matrix

This is the product configuration scores-page. From here you can set scores for all products together. It is possible to change the layout of the table, viewing all or just some questions or products at a time.

Note: No two products should have the same score for all answering options, there must be at least one difference in one question. If you cannot accommodate this you should consider revising your questions.



Add all product scores here using the help text/rules as a guide. When completed save the table, and check your entries by choosing appropriate views: I.e. Sort by the scores of an answer – and controlling then the row (or column) of products, you will notice if the products are ascending or descending for this criteria properly. Or you see if products of the same category are next to each other (same or similar scores).

Further tests can be done on the wizard itself and the tuning engine (see chapter about testing, start page 62).

7.1.7 Weighting of questions

Weighting is concerned with questions. In some circumstances you might wish to place more emphasis on one question over another. On the main question page for each question there is a Weight field where you can set the weight in percentages. Weighting questions is optional, and not needed for all situations. You should keep in mind any score settings that are biased before adding weight to questions (biased scores: using a higher scale on one question than on another).

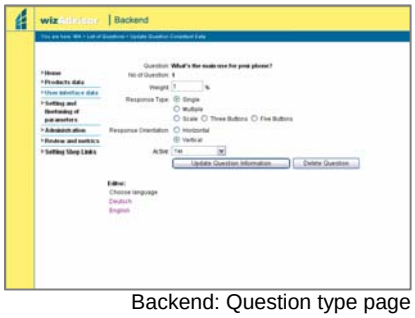
Note: when you have questions with a longer list of multiple choice options, products can gain a lot of scores at this question as all answering options scores are added to a total sum for this question. In case this question is not of higher importance than other, give it therefore a smaller weight (i.e. 25% while all other have a weight of 100%).

Navigate to the Question type page to add/change question weighting settings

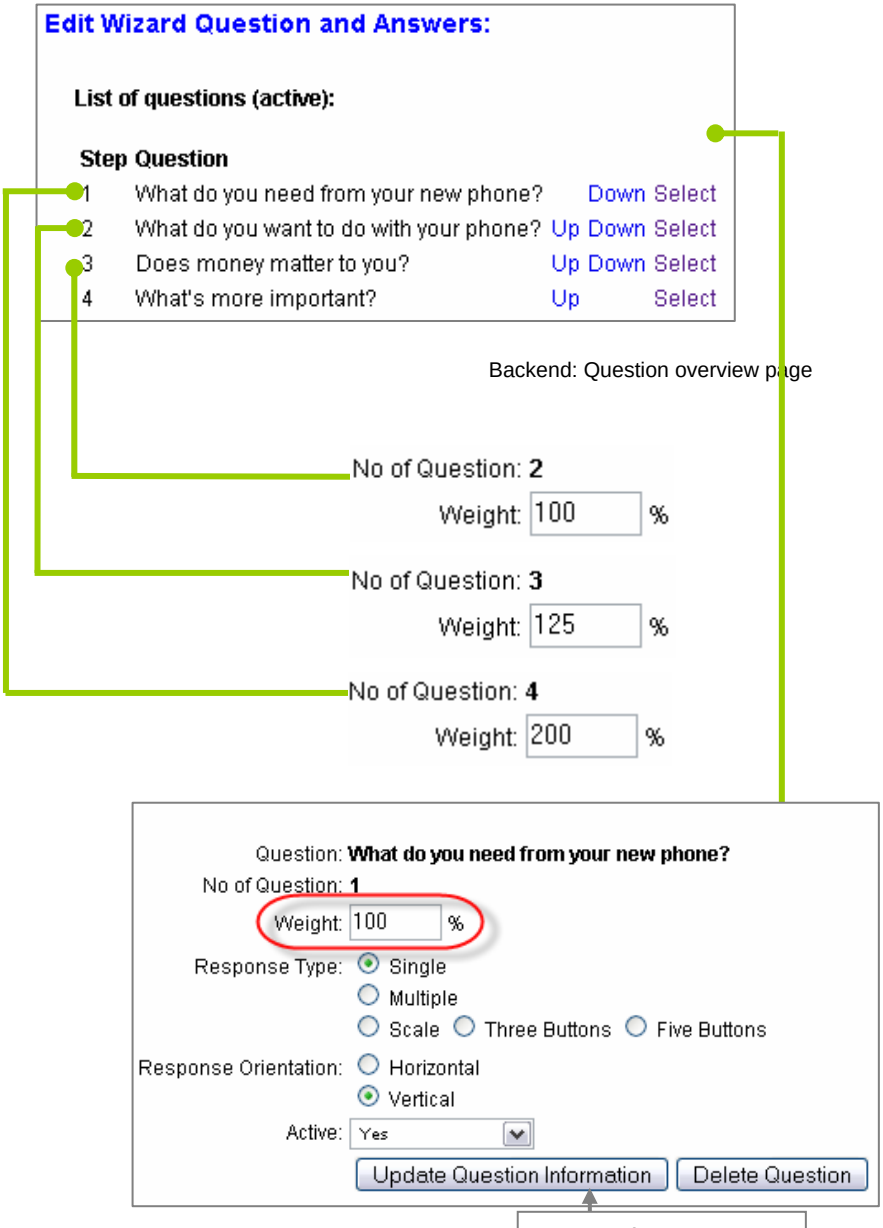
From the main menu select User interface data, then select Edit/View under the Select.-by-Usage-Wizard heading. This will lead you to the Question overview page. Select a question to go to the Question type page.

Backend: User interface data

Backend: Question overview page



Backend: Question type page



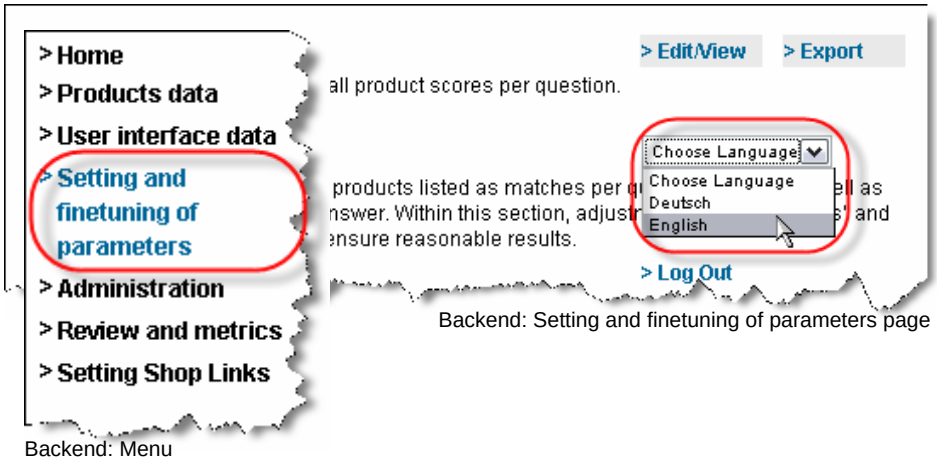
Backend: Question type page

8 Testing

8.1.1 Part 1 – Backend testing: Select by Usage - Wizard

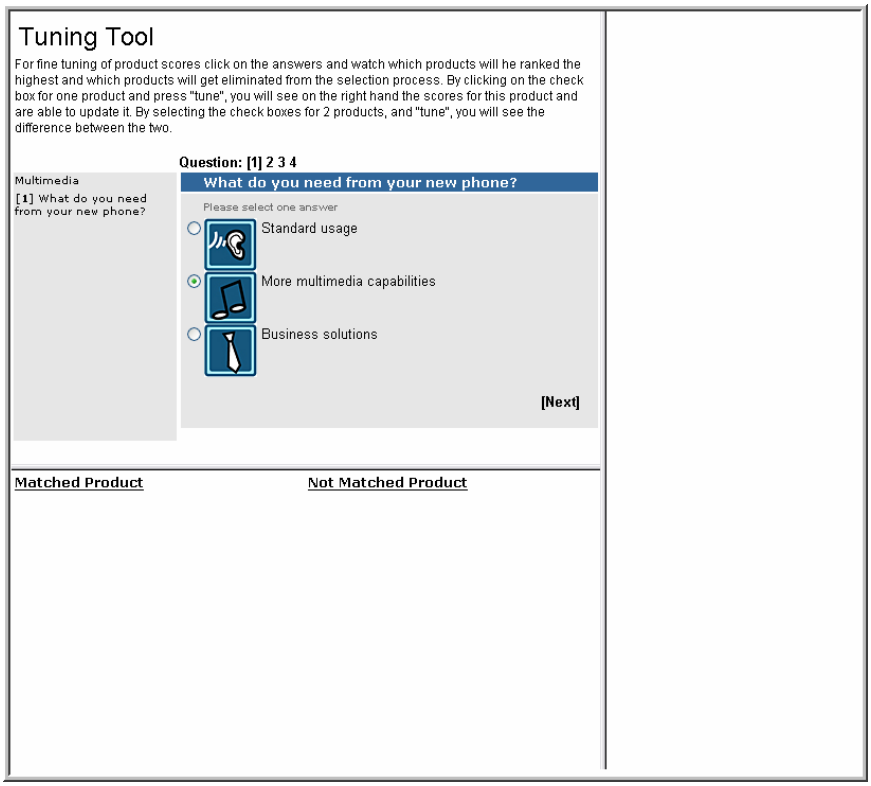
The Tuning engine is used when testing the select by usage wizard. It is found on the Setting and finetuning of parameters page. Choose a language and the tuning tool opens up in a new window.

Backend: Setting and finetuning of parameters page



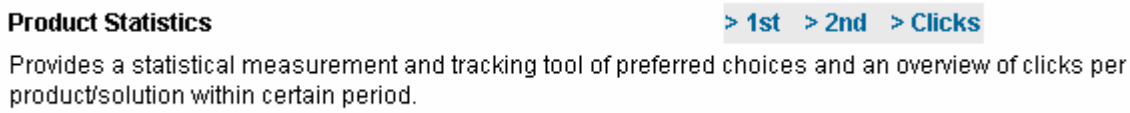
Backend: Setting and finetuning of parameters page

Backend: Menu



8.1.2 Part 2 – Real Life Testing

Use the statistics from the “Reviews and Metrics Area”, to see how your configuration is working with real life users.

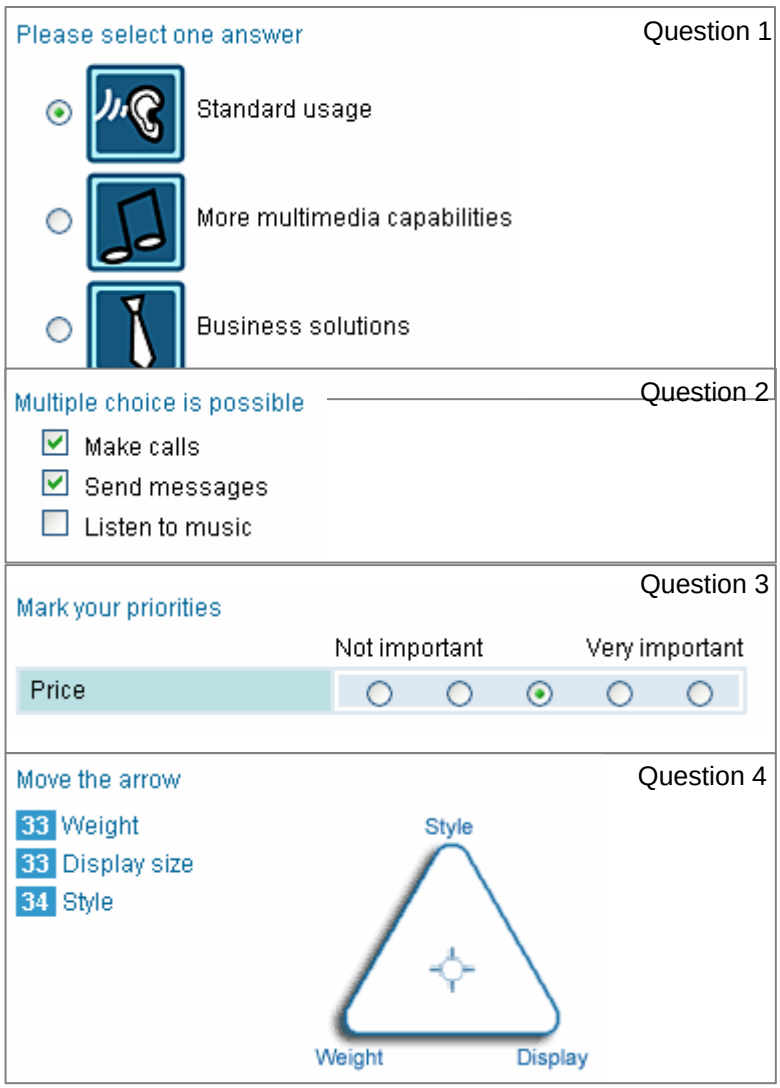


Watch the distribution of selected products. You can compare those with your experience of a realistic / very likely distribution. When this does not correspond properly, you should consider to improve the product configuration.

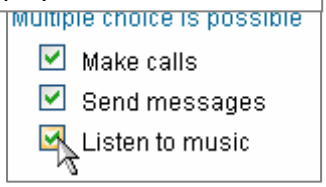
In case a product has never been selected, the “internal competition” in your portfolio means there is a better product for the same customer needs. When there is a reason why you want to keep this product in your portfolio (i.e. because it has a lower price), then update the configuration for this configuration accordingly (i.e. include a price question, or set the scores for better price higher for this product).

8.1.3 Part 3 – Fronted testing: Select by Usage - Wizard

A straightforward way to test is to simply answer the questions and check if the results meet the requirements you stated.



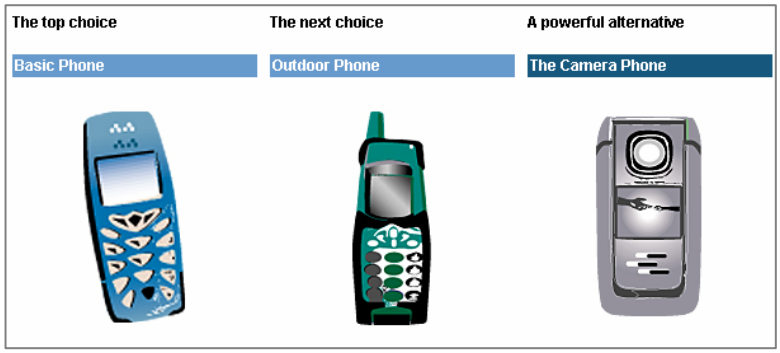
If you change the choices for question 2, to include Listen to music, you will see that the results no longer display the Basic Phone.

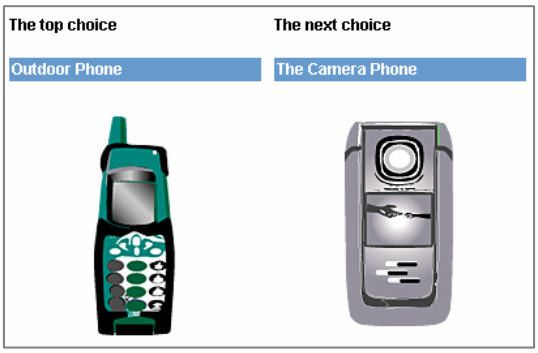


Make sure that your results display the appropriate products. You should test several combinations of answers.

You will notice that only 3 answering options are displayed for question 2. This is because there are no products with the other features available anymore – the user selects Standard usage for question 1. All products that have score of 0 for this option are now removed. If Business solutions were selected in question 1, then an extended list would have shown up for question 2.

Results:



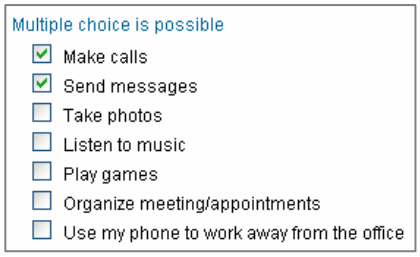


Another way to a test your product set up is to look at the scores and then choose the answers. For example the Business Phone has a score of 4 for question 1 for the Business solutions option. Check this option for question 1. For question 2 the phone has 0 for the camera option (so do not check this option). Continue this process for the other questions, making sure that the Business phone will be displayed on the results page. This is a good way to find out if a certain product will show up on the results page. You can then change scores accordingly if you need.

Obviously some questions are more suitable for tuning then others. Question 2 for example has limited tuning ability. Either a product has a feature or not. In some cases, such as the Take photos option for this question, you can give products with higher camera resolutions higher scores.

See the table below and discover how different results can be, for users who alter their requirement on the final question. A greater range of products will permit wider changes in results here. Users have the ability to cement their usage needs, leading them to their ideal product.

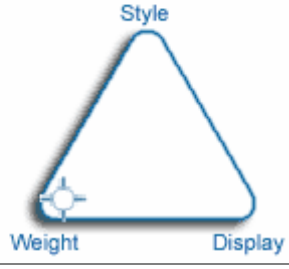
Frontend: Question 1



Frontend: Question 2

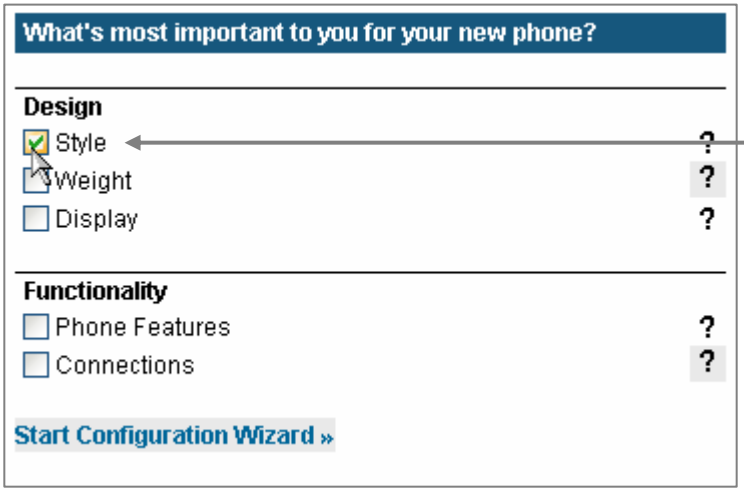
Frontend: Question 3

Re-examine scores for the triangle options to get the desired results. Products that meet all previous requirements are optimized for the results page here.

	Requirement in question 4	Results		
		Top choice	The next choice	Powerful alternative
Neutral = all under 50	Move the arrow 30 Weight 22 Display size 48 Style 			
Style = over 50	Move the arrow 5 Weight 14 Display size 81 Style 			
Display size = over 50	Move the arrow 24 Weight 56 Display size 20 Style 			
Weight = over 50	Move the arrow 84 Weight 7 Display size 9 Style 			

8.1.4 Part 4 – Frontend testing: Select by Specification - Wizard

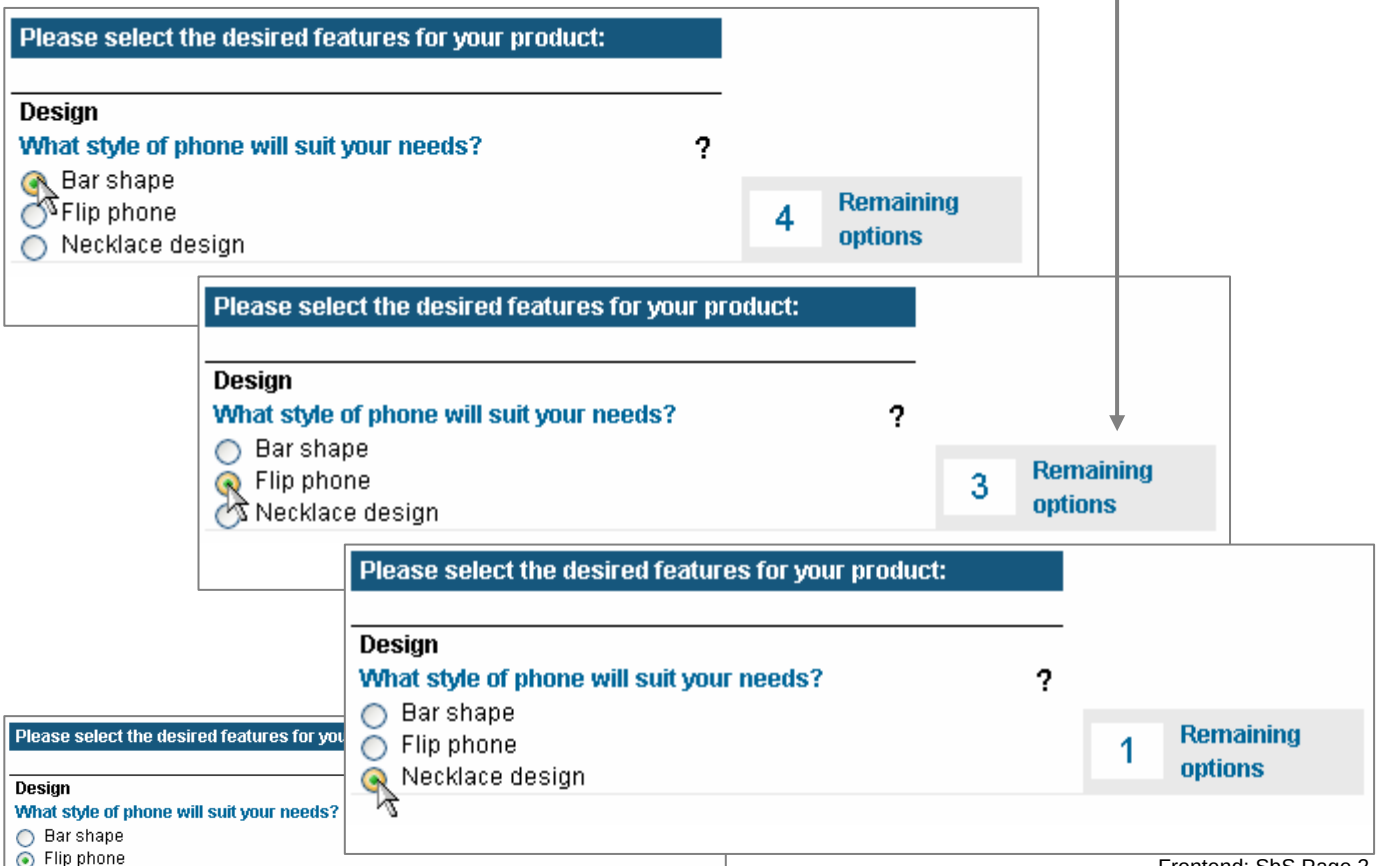
The select by specification testing is simple. Results display all products that have the selected specifications, be it just one product or hundreds. Users are notified if no products match their needs, thus requests can be changed straight away.



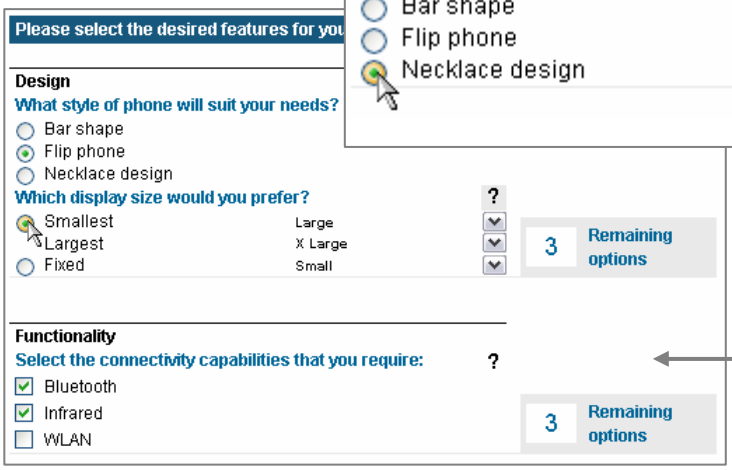
Frontend: SbS Page 1

From the Select by Specifications wizard select only the Style option.

On the second page you will see that as you select the three different specifications the Remaining options figure changes. Start the configuration wizard (step 2) and make sure that the correct numbers of products are displayed for your



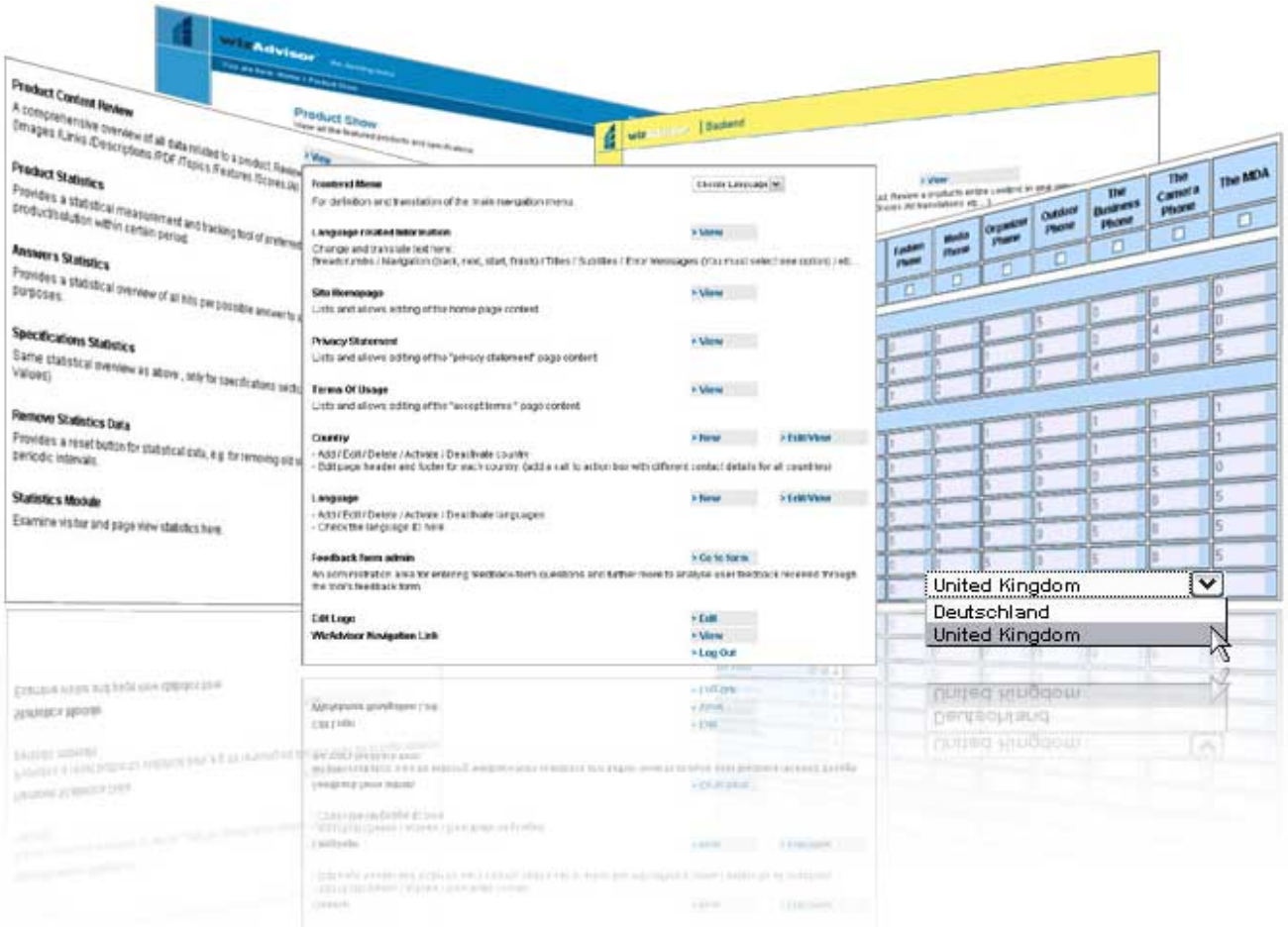
Frontend: SbS Page 2



Frontend: SbS Page 2

It is also good to test results with different combinations of selected specifications. It is not necessary to test every possible eventuality and combination. The Product Content Review form should be used instead, to verify the product information that has been entered into the tool. See page 54 for more details.

9 Everything else



9.1 Overview

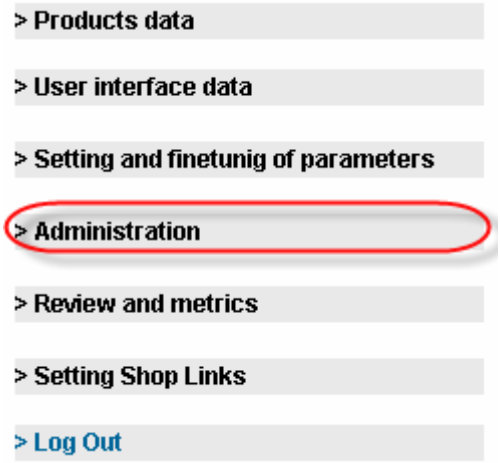
The two wizards (select by usage and select by specifications) along with the products are the core elements of the WizAdvisor tool. Additional parts and features of the tool are discussed in detail in this chapter. Setting up extra languages and countries, customizing the homepage, titles, navigation text and the statistics module is just some of what is explained. Many of the features available here enhance the WizAdvisor tool and offer customization possibilities. Further integration options concerning layout is explained on page 80.

This chapter covers the following aspect of the WizAdvisor tool:

- Backend administration
  - Creating new backend user access
- Display options
  - Select by usage and Compare layout
- Feedback form
- Glossary / Definitions for terms
- Groups
  - Compare
  - Single page all product overview
- Languages and Countries
- Main menu
- Other pages
  - Homepage
  - Creating new pages of your choice
- Other Text (Titles / Subtitles / Navigation)
- Shop links

- Statistics
  - Answers given
  - Resulting products
  - Specification choices

9.2 Backend administration: User access



Backend: Administration page

Go to the Administration section from the main menu.

You will find options to add New users and to Edit/View current user settings. (User name and Password)

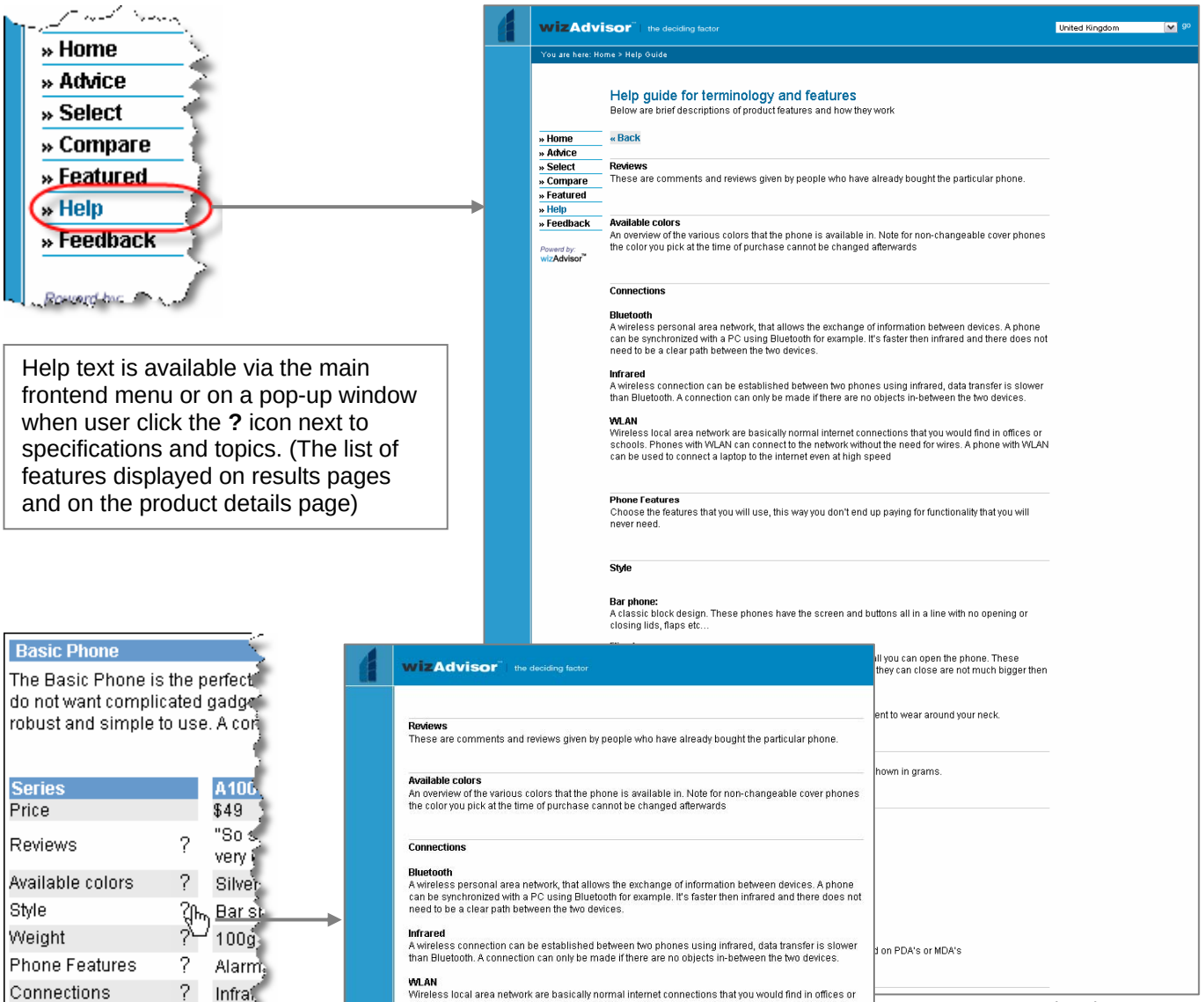
Backend: Administration page

Backend: Add new users

Backend: Edit/View user list

Backend: Change user name / password or delete user

9.3 Info-guide / Glossary / Help text / Definitions for terms



Help text is available via the main frontend menu or on a pop-up window when user click the **?** icon next to specifications and topics. (The list of features displayed on results pages and on the product details page)

Frontend: Help text page

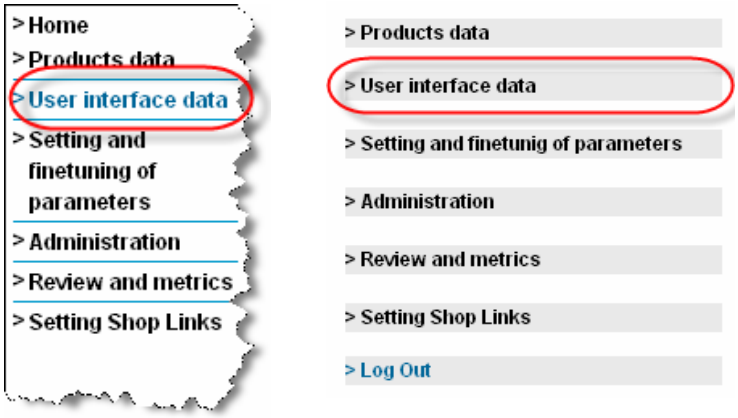
Frontend: Help text page – pop up window

On the frontend it is not apparent which help text was set up as part of “topics” or as part of “specifications” – information.

See page 36 for details of how to add help text for specifications.
Adding help text for topics is explained on page 42.

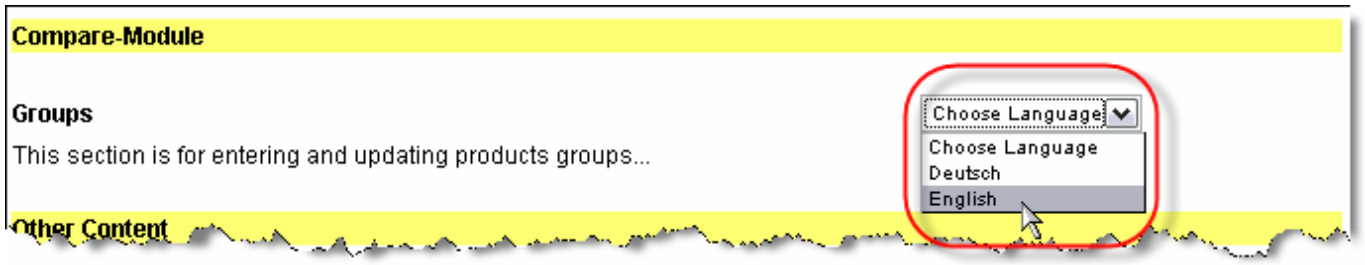
9.4 Groups

Products can be sorted by groups on the frontend when users go to the Compare or Featured sections from the main menu. To add new groups go to the User interface data page from the main backend menu, under the Compare-Module section select a language.



Backend: Menu

Backend: User interface data

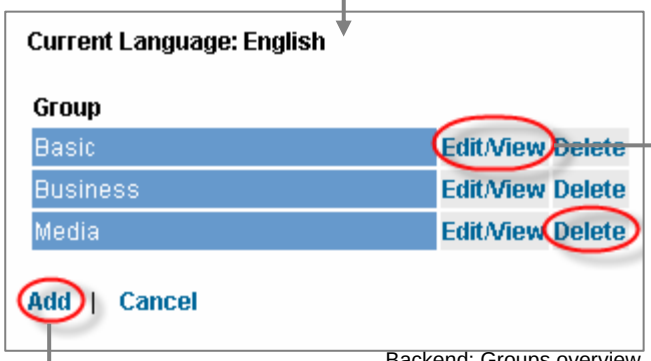


Backend: User interface data

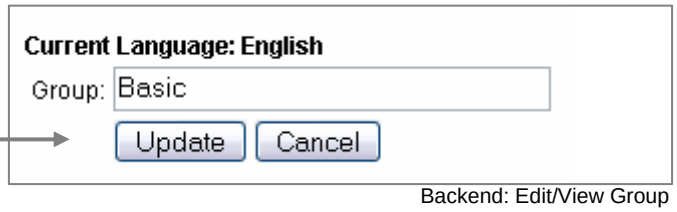
The next page shows the current Groups for the selected Language.

Add / Edit/View / Delete groups here.

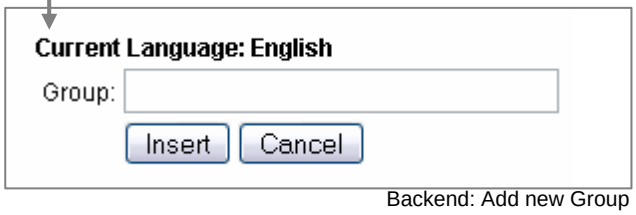
Always start with the same language (language ID 1) and then enter translations accordingly.



Backend: Groups overview



Backend: Edit/View Group



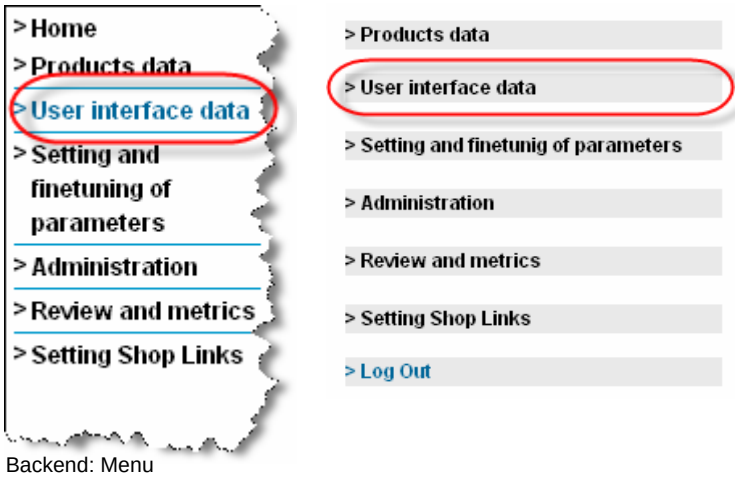
Backend: Add new Group

Groups are used to sort products on the fronted in the Compare and Featured sections.

Frontend: Main menu

9.5 Countries and languages

We recommend to enter additional countries and languages once your tool is ready for one country and one language. The first language / country has the ID nr 1. If you have a list of countries and languages that you want to create you can add all of them altogether, extra ones can be added at anytime. The first step is to add languages. From the main menu click on User interface data and then find the Language section under the Other Content heading. Adding new languages and countries is a very simple process.

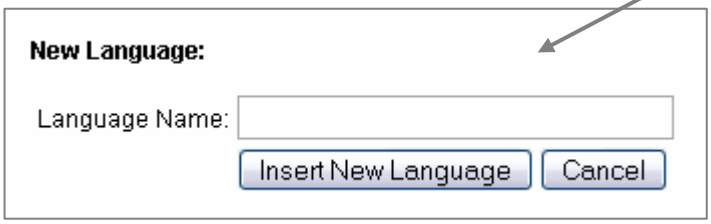


Backend: Menu

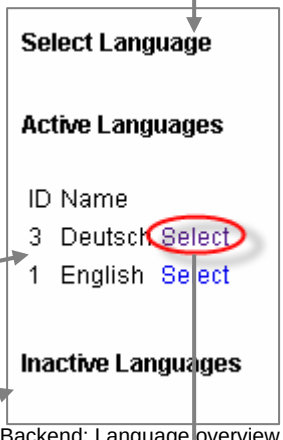
Backend: User interface data

9.5.1 Languages

Backend: User interface data



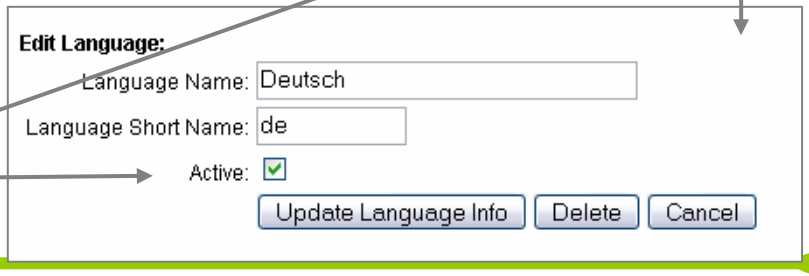
Backend: Add new language



Backend: Language overview

Language ID's are set automatically by the system. The ID number is used in various places, for example when uploading translated triangle images the Language ID number is needed. More on page 18.

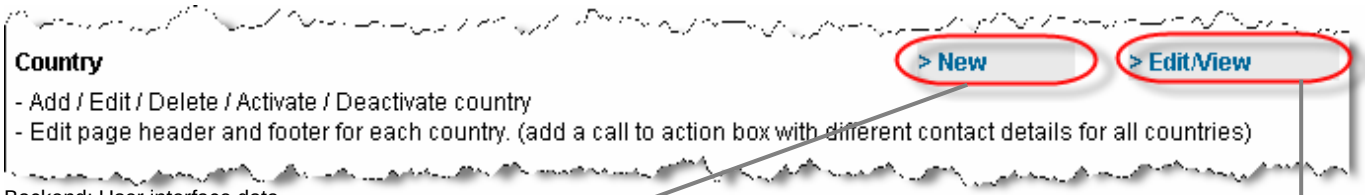
If languages are set inactive, details are not visible on the frontend. If for example you have a live tool and wish to include



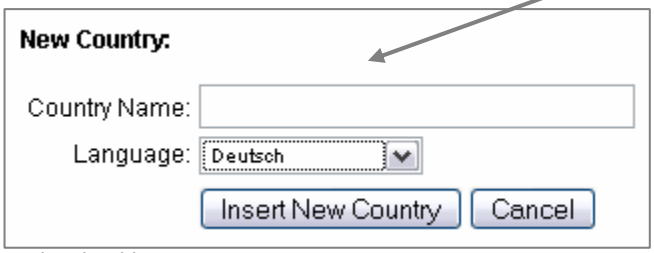
Backend: Edit language info

9.5.2 Countries

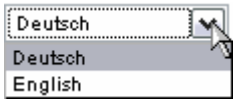
The section for adding or editing Country information is also found in the User interface data page. We recommend to set up languages first. Often one language may have several countries associated with it. For example English may have Australia, UK and USA. In a set up like this you would not need to re-enter questions or product information for each new country.



Backend: User interface data



Backend: Add new country



Enter the name of the new country and choose the language.

Backend: Country list

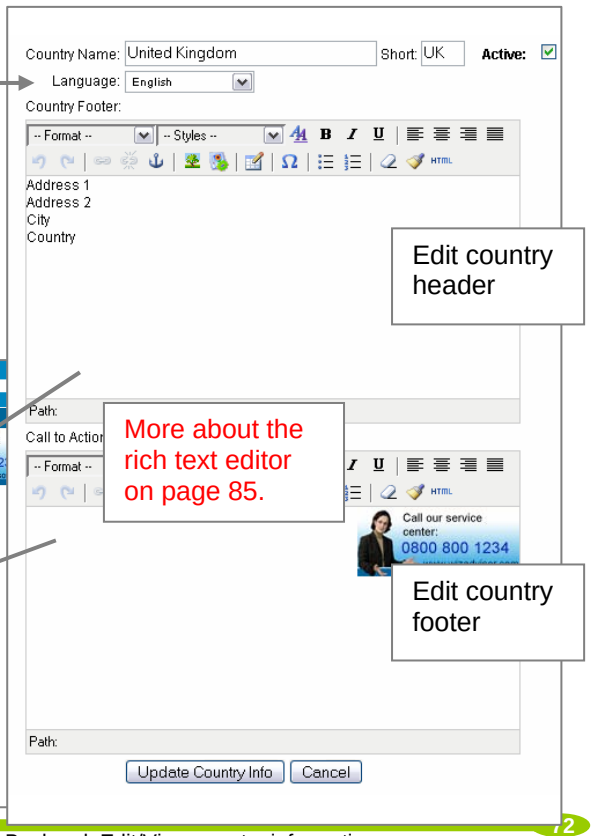
9.5.2.1 Country information on frontend

It is possible to display text or images on pages on the fronted for each country, similar to a header or footer. On the mobile phone demo you can see that there is a call our service center image at the top of the page. To edit content here select the country and a page with two rich text editors opens. Add your header and footer content.

Header shown on:
- Usage wizard results
- Specifications results
- Compare
- Featured

Footer shown on all pages except:
- Home
- Help

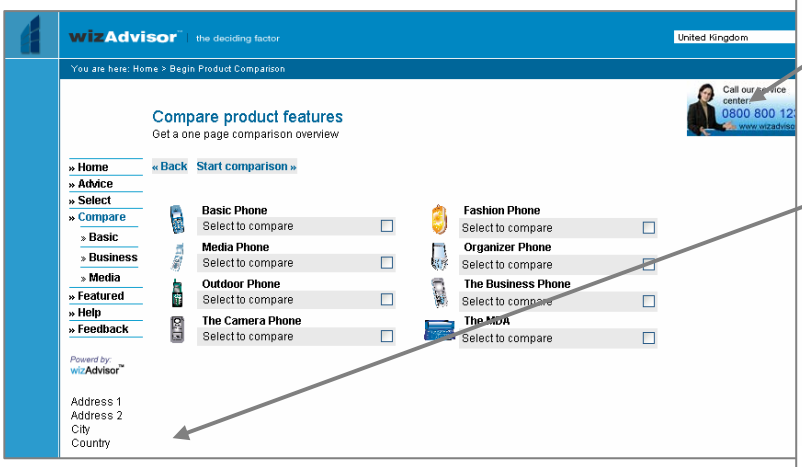
Edit country properties



Edit country header

Edit country footer

More about the rich text editor on page 85.

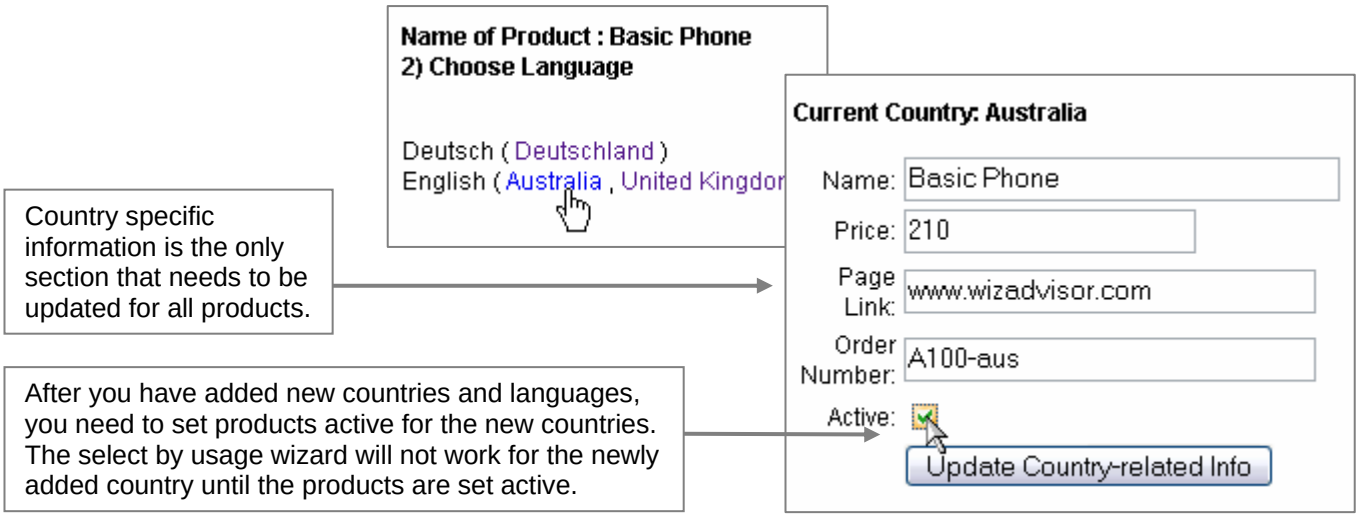


Frontend: Compare page

Backend: Edit/View country information

9.5.2.2 Set active

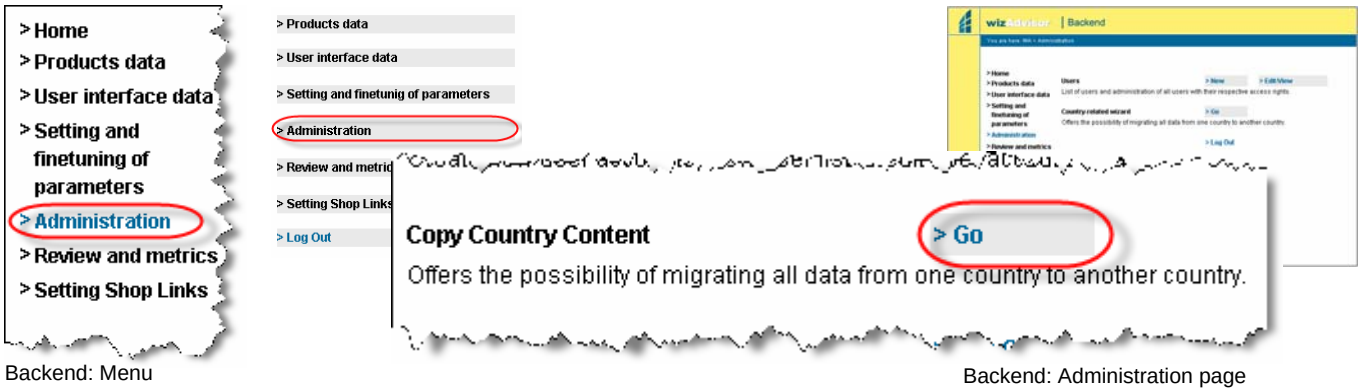
The select by usage wizard will not work for your newly added country until you have set your products active. More about updating Product information on page 43.



Backend: Add product information

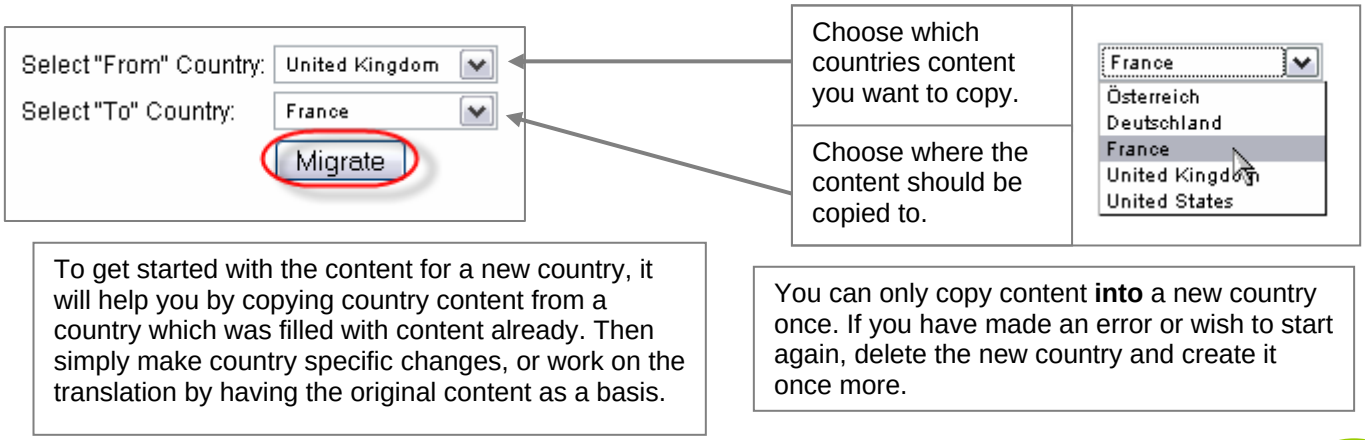
9.5.2.3 Migrate country information

After entering a new country you have the option to copy all content from one country to this newly added one. All product information, questions and answer options and language related information is copied, making translations much easier to do if necessary. For example, if you add a new language (French) and a country (France) you can use the migration option to copy all content from the United Kingdom to France. To find the Copy Country Content section, go to the Administration page from the main menu.



Backend: Menu

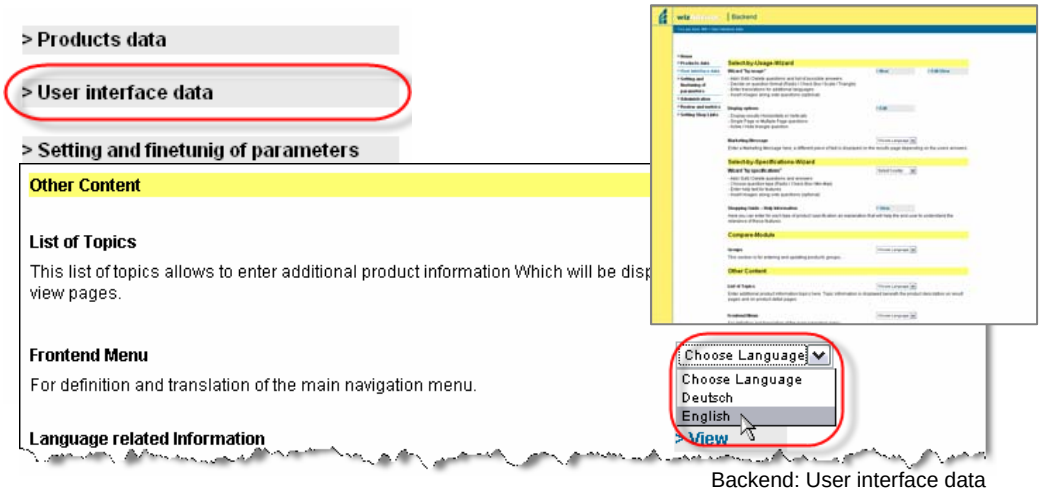
Backend: Administration page



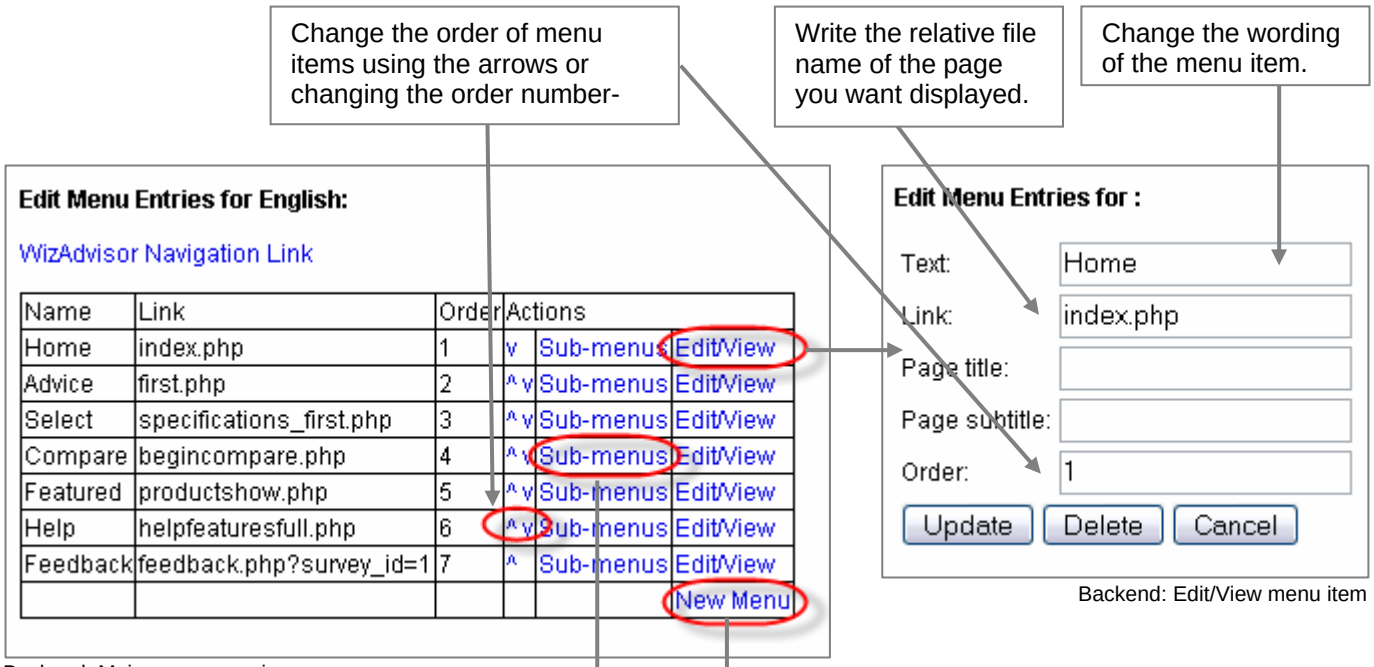
9.6 Main frontend menu

You can fully edit the main frontend menu. It is possible to create new pages, to set links, and to alter or translate the text. From the main backend menu navigate to the Frontend Menu section and choose the language.

Backend: Menu

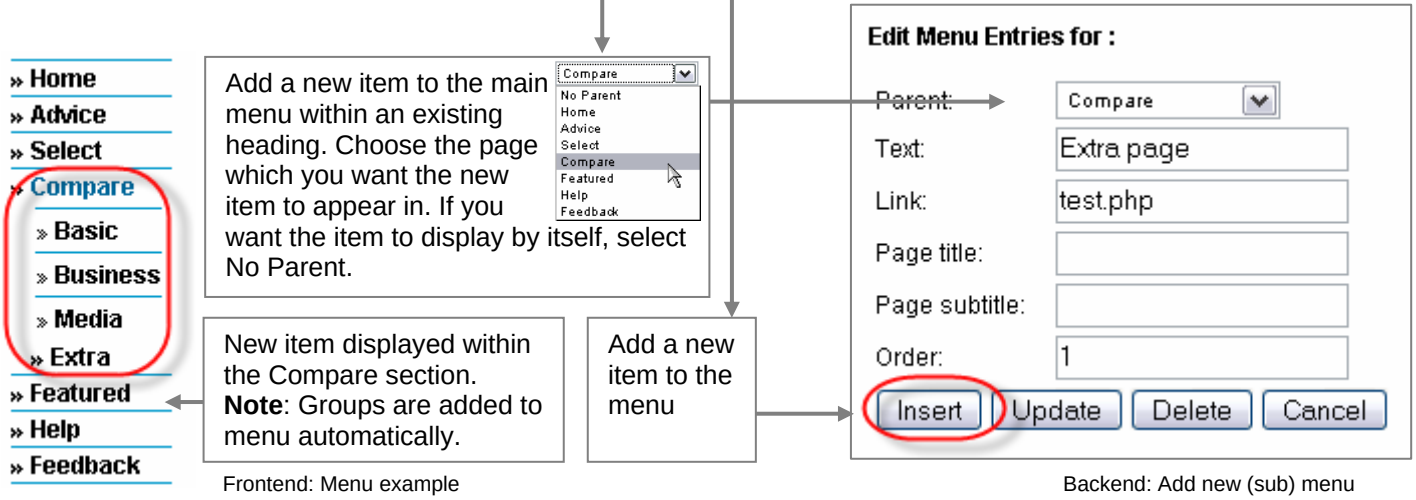


Backend: User interface data



Backend: Main menu overview

Backend: Edit/View menu item

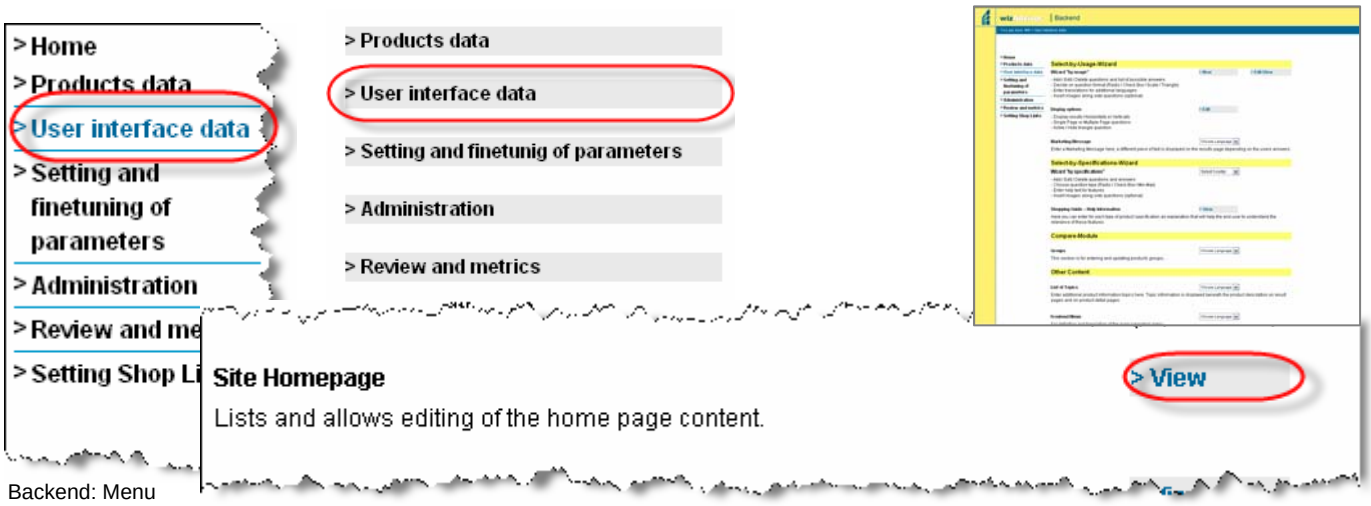


Frontend: Menu example

Backend: Add new (sub) menu

9.7 Homepage

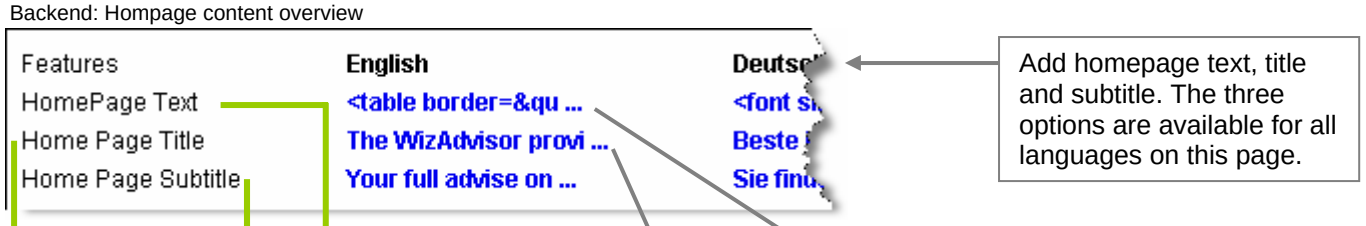
The homepage content is fully customizable using a rich text editor. For more advanced structures you can simply copy and past source code in. From the main menu go to the User interface data section, under the Other content heading you will find Site Homepage, the following page displays three options for all languages: editing Text, Title and Subtitle.

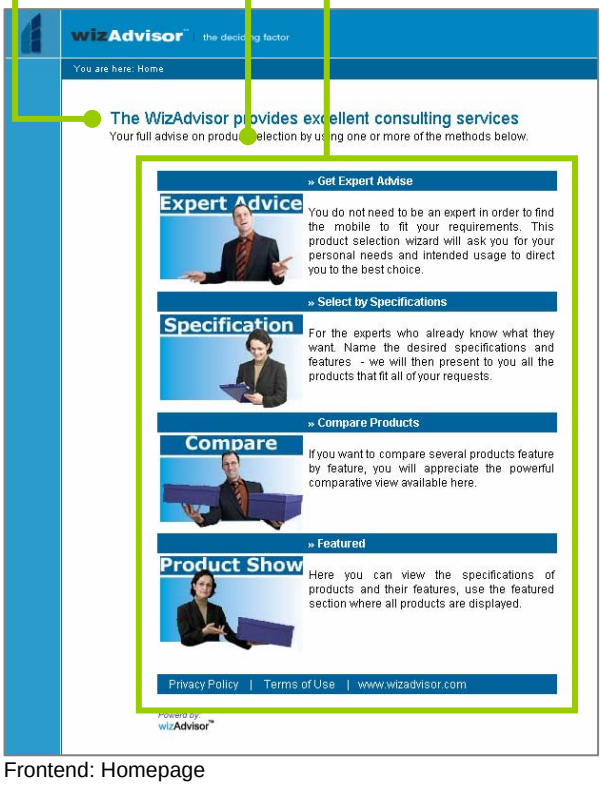


Backend: Menu

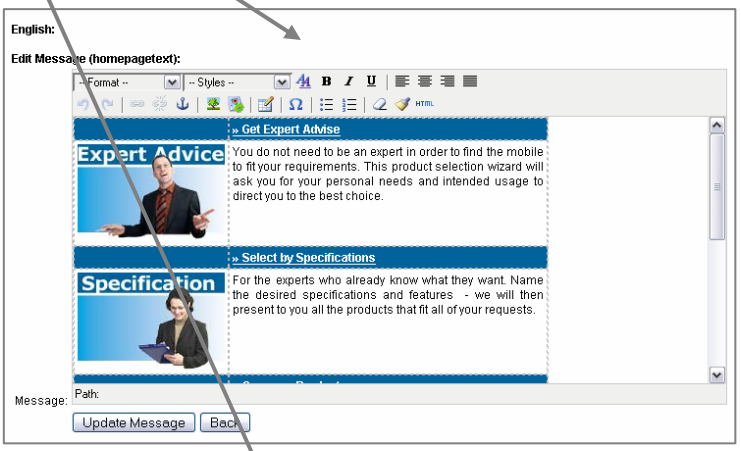
Backend: User interface data

Backend: Hompage content overview





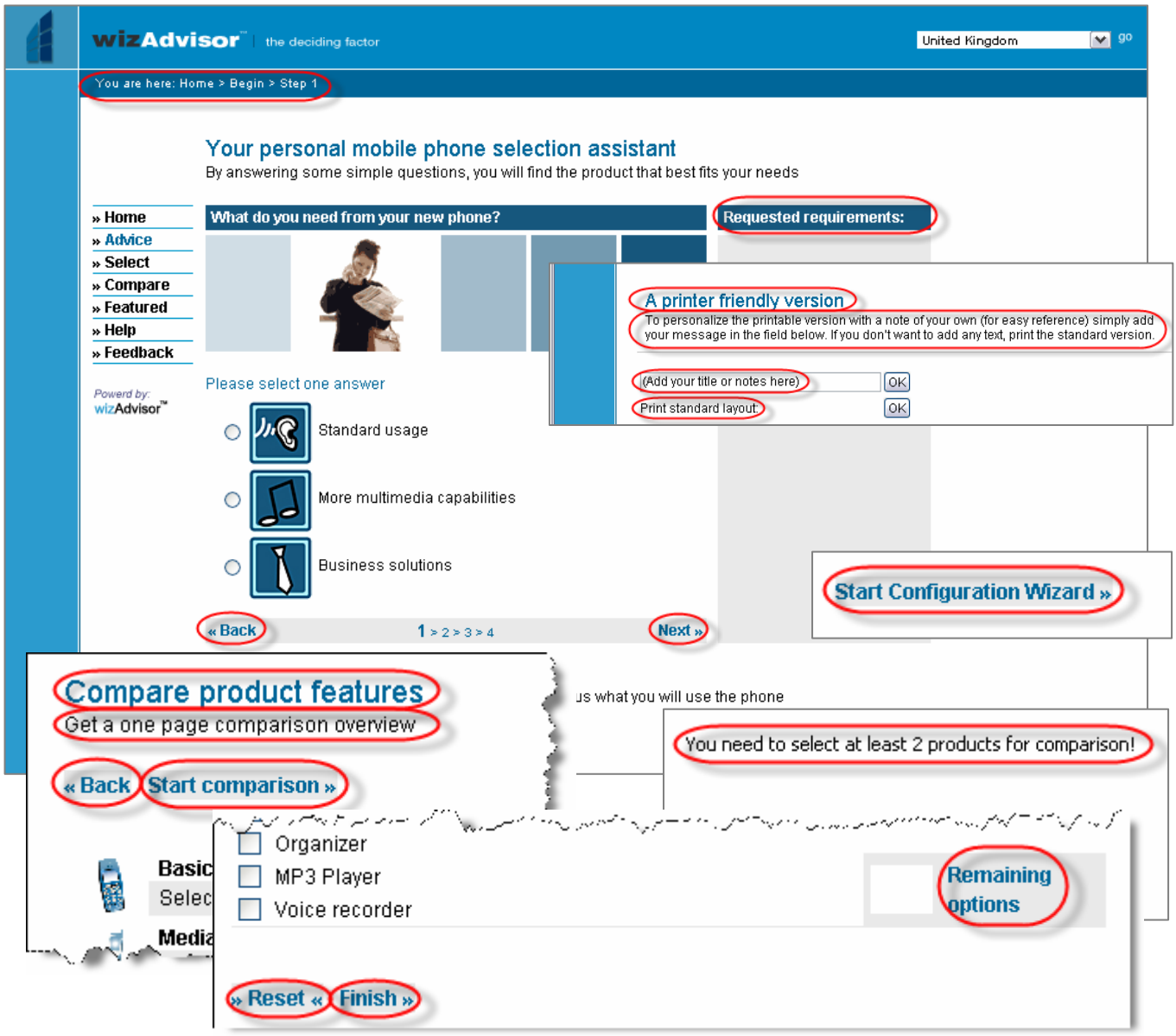
Frontend: Homepage



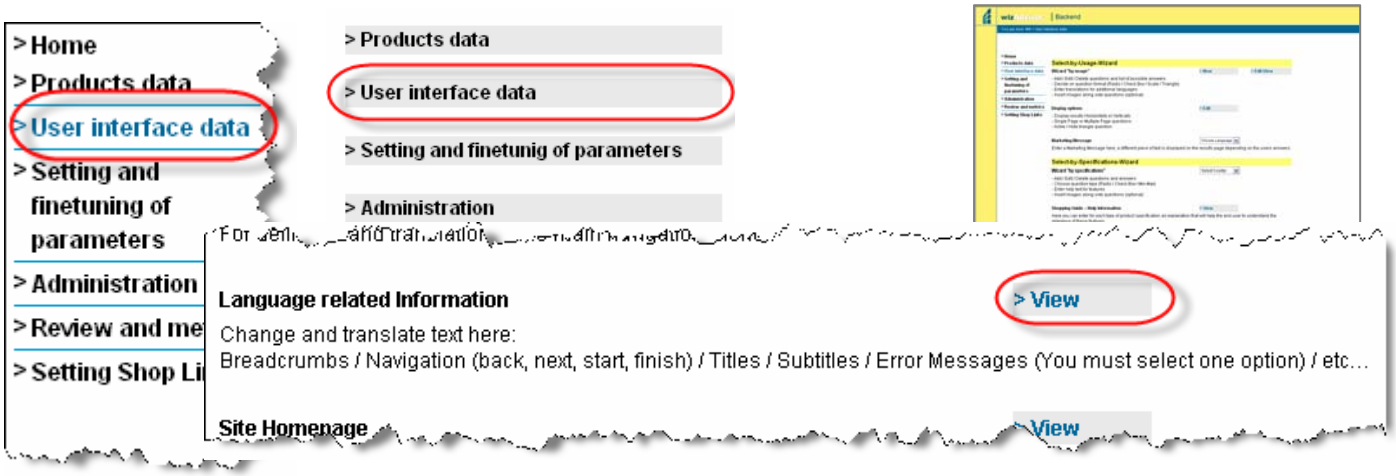
Backend: Edit homepage text

Backend: Edit homepage title

9.8 Other text “User interface data”



Throughout the tool there are many pieces of text: navigation, titles, explanations or otherwise. These can all be edited and are translatable. From the User interface data page under the Other Content section you will find Language related information. Click View.



Backend

Backend: Edit text content

On the next page you can choose Content or Breadcrumbs to edit the corresponding text.

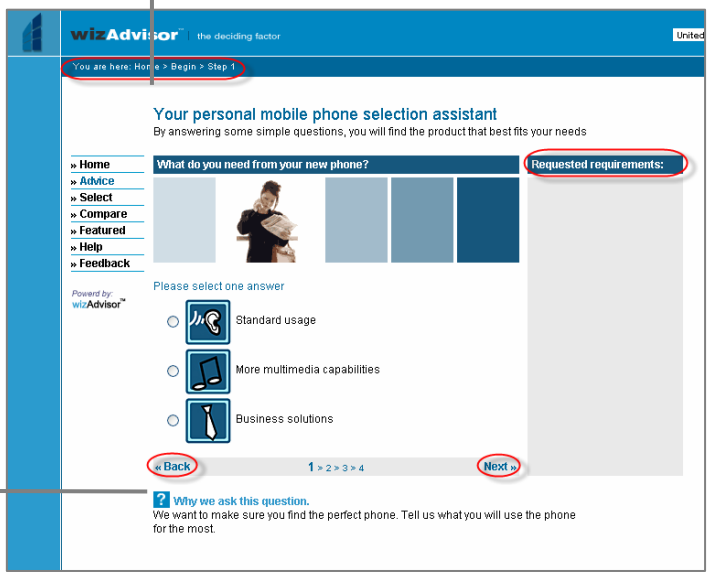
All of the tools content is listed here. You can use your browser to search for items. (Ctrl + F).

Text is sorted by alphabet of the first language (ID Nr 1).

Backend: Edit breadcrumbs

All language translations can be made here. As a default the first language text is used. In this example French has been added. The original language text is displayed (English) when making translations.

Only breadcrumbs navigation is on this page



Frontend: Select by usage wizard

All other text is on the main content page. Titles / Subtitle / Error messages / Next, Back, Start etc…

9.9 Shop links (Session ID Tool)

In order to link back to the webshop including sesson id, create links back to application that called the wizadvisor:

Steps:

1. Create a name for the link. The link can be active or inactive (visible / invisible). This will be called from the php files.
2. Add the steps for creating the link. The parts defined in "Link parts" will be concatenated in the order you define. Here you have to add the name, the value that will be concatenated in the final link. The value can be the name of a php function that returns the results that will be added to the link and you have to choose function - in our case the function that returns the session id needed.

Alternative: it can be a part of the link, and the you choose not a function (ex. the base url)

Special Links
- same as above, if there are other links that you need to go in the other application with some parameters.

Regular Expressions
- you define the regular expression (REGEXP) used to take some parts of the link send by the "parent" application called the wizadvisor

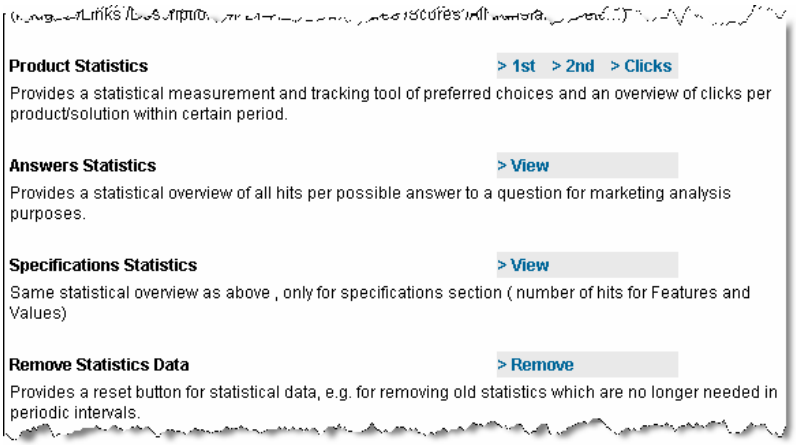
Links' IDs to Constants
- here you define the constants used in the frontend functions and you attach at id the corresponding ID from special links or link back to the webshop including session

Slide-ul 2:
When "active" is checked, the product is visible in the frontend. When unchecked it is not visible.

9.10 Statistics

The statistics section is found on the Review and metrics page. The statistics will tell you which products / services have been chosen by users, which answers (needs or specifications) users have looked for, and if the selected products / services have been finally picked for purchase.

Backend: Menu

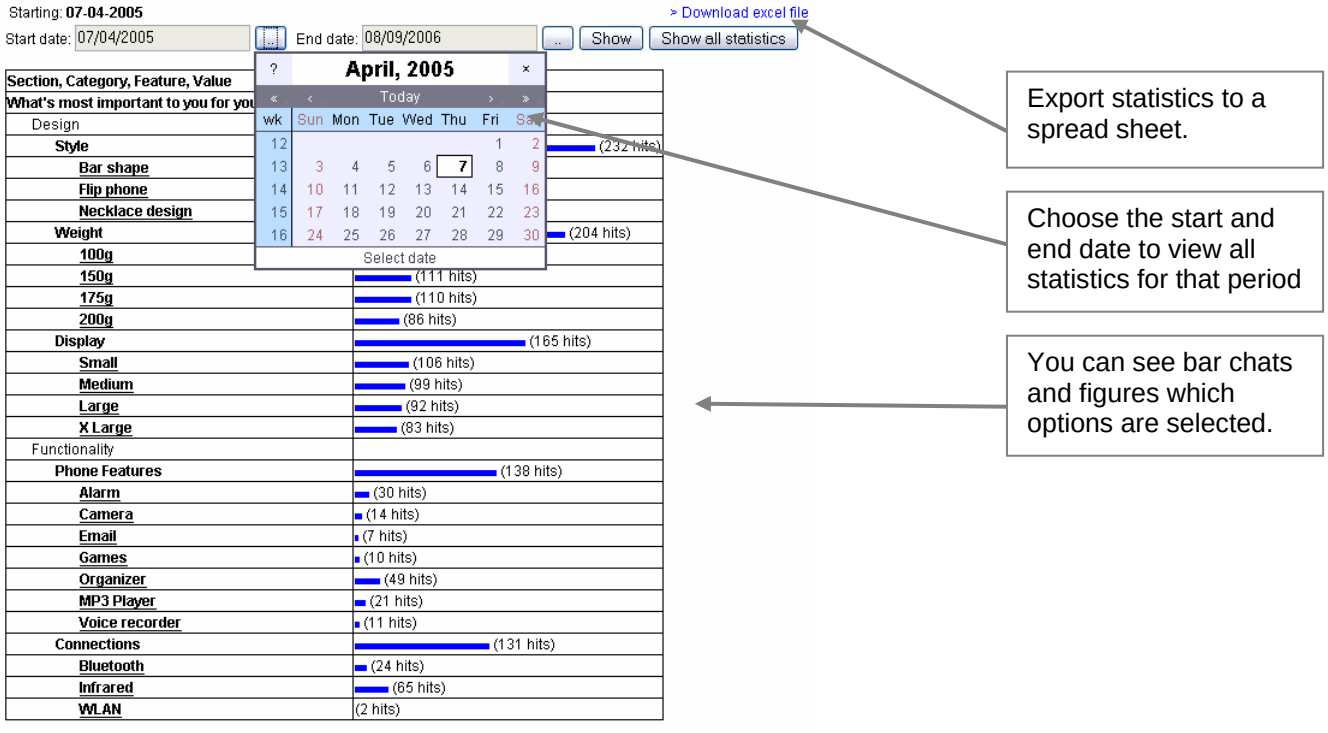


Backend: Review and metrics

Product Statistics
Here you will see how many times each product resulted as the first and second choices in the select by usage wizard. You see which products meet your customers needs best.

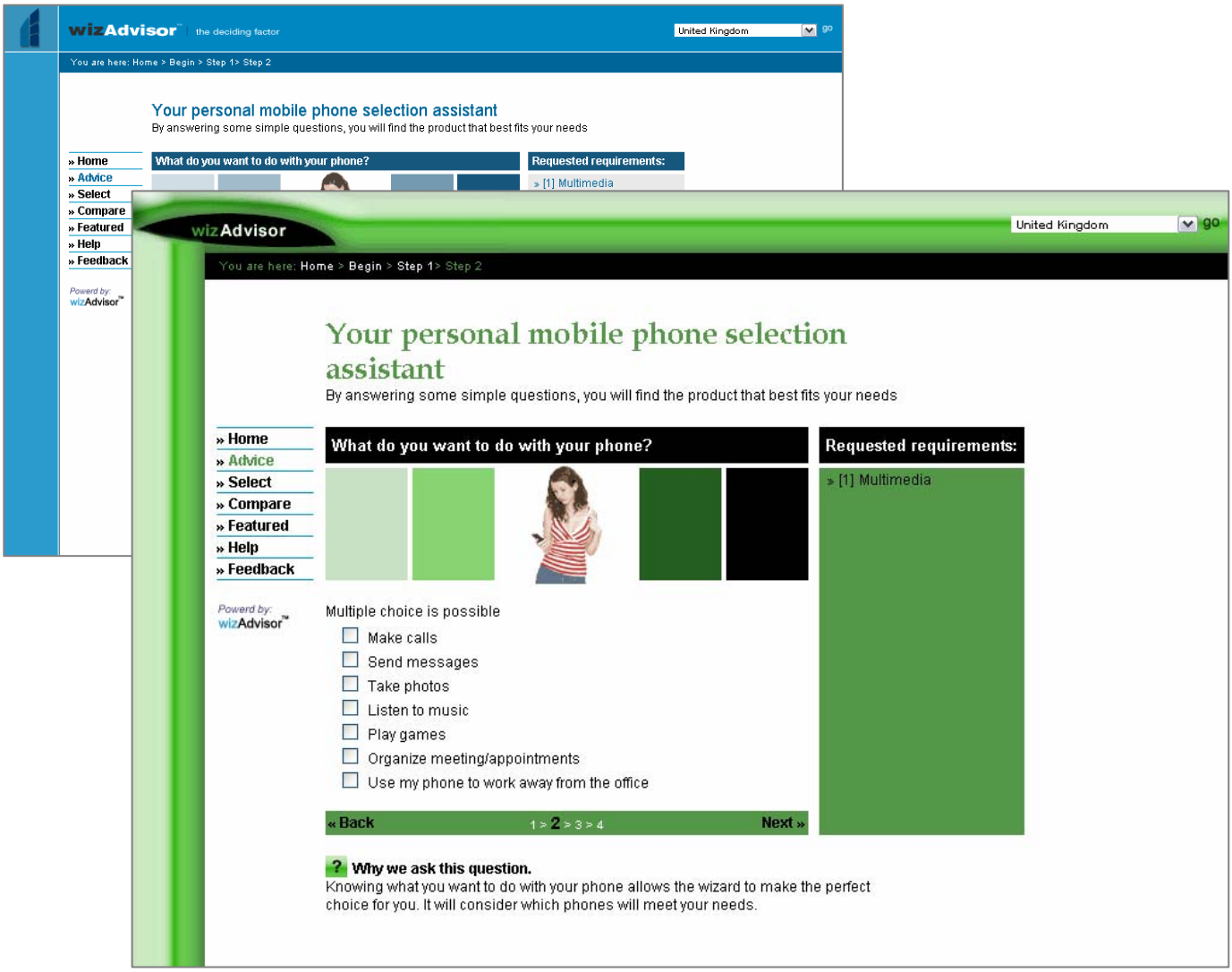
Answer Statistics
Each answer option the users select is logged here, this section is particularly useful in finding out what users are looking for in your products or services. It is the most valuable feedback you can get, as this allows to finetune marketing messages and back up strategic marketing decisions.

Specification Statistics
You see how much specification criteria are requested by your customers. This feedback will help in selecting items for your portfolio, or for further product development.



Backend: Specification Statistics

10 Layout



10.1 Overview

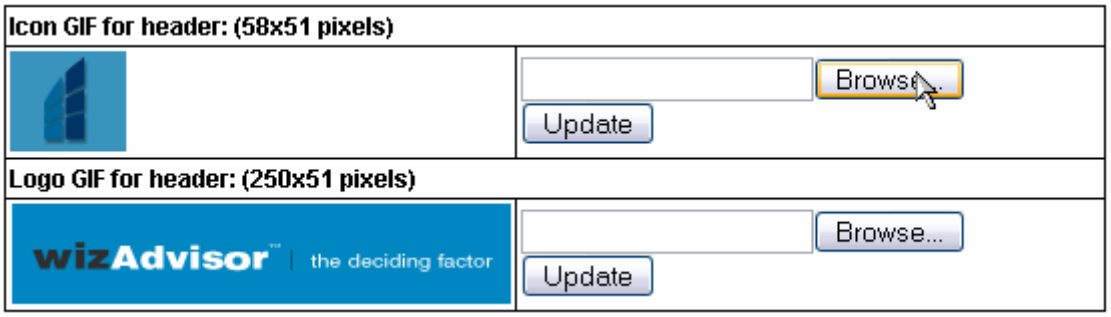
The WizAdvisor tool layout is fully customizable. The easiest thing to start with is adding your company logo, this can be done from the backend from the User interface data page. Most changes of color, fonts etc... can be made from CSS style sheets. Further integration options can be made by uploading image files, overwriting existing content. The top and left blue bars for example can be easily changed. Advanced structural changes are possible via the template files. This chapter will explain how to make changes to the CSS files and how to overwrite image files for basic to intermediate layout alterations. All design changes are made outside the backend except uploading of a company logo. Remarkably the entire layout can be radically changed in little time, all you need to do is update the CSS file and replace 6 images to match your design. Of course full customization can be made by modifying template files for experienced web programmers.

- Add your logo (Basic)
- CSS files (Basic)
- Replace image files (Basic/intermediate)
- Structural changes (Advanced)

10.2 Add your logo

You will find a section in the backend for this. From the main backend menu, go to the User interface data page, under the Other Content section you will find a Edit Logo. Click Edit. The next page displays two images: icon and logo used on every page throughout the tool. Here you can upload your company logo or icon.

Backend: User interface data



Backend: Edit logo page

Recommended image size:
Icon: 58x51 pixels
Logo: 250x51 pixels

Mobile phone demo:

top.gif

top2.gif

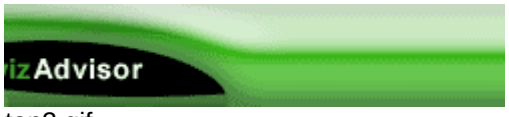
topbg.gif

bg.gif

The top and left “bars” that run across the page are changeable via the the main img directory. See page 79.

Sample layout:

top.gif



top2.gif

topbg.gif

bg.gif

You could have a “joint” image to simulate one complete image, for more complex layout designs.

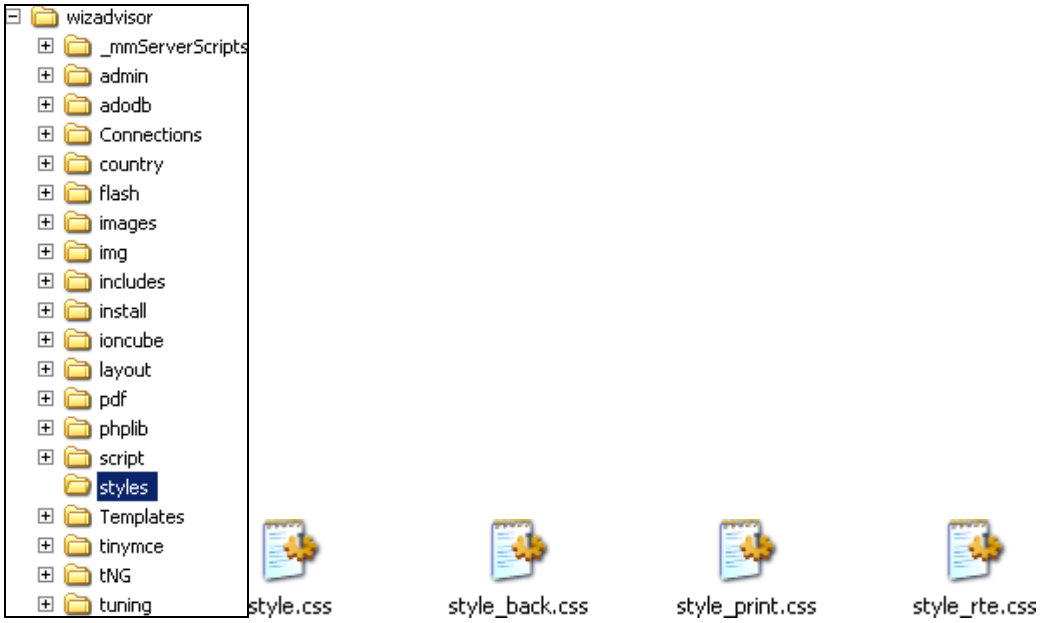
10.3 Changing layout using CSS files

There are two CSS files used for making changes, one for all fronted end pages and one for the printable version pages.

10.3.1 Where to find the CSS file

From the main WA directory you will find a folder called Styles containing four CSS files.

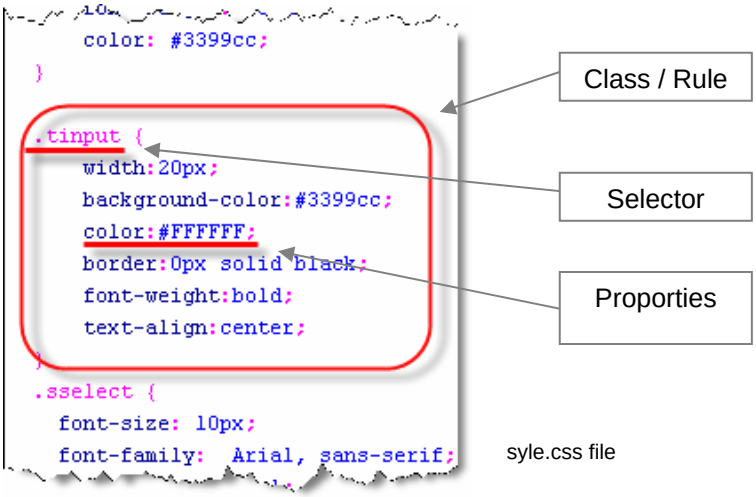
- style_print.css File can be used to edit printable version
- style.css Main file for WA tool frontend
- *style_back.css* *(you do not need to edit this file)*
- *style_rte.css* *(you do not need to edit this file)*



WA directory system located on your local computer / server / where the tool was installed.

10.3.2 How to find the class

On the following page you will see an example of where changes appear on the frontend and which classes to update in the style.css file. There are of course many more classes that you can define to incorporate your design. You should look into the source code to find the appropriate class names. Remember to make a back up of the original files in case you accidentally delete some information or wish to revert back to the original mobile phone demo's style. It's a good idea to test thoroughly when any updates to colors or fonts are made to ensure that the design is what you need.



syle.css file

All classes / rules are listed in these two files:
style.css and style_print.css

Some classes have more then one selector. This enables you to, for example, define the same setting (font size) for two classes, then you can define different colors for each individually.

10.3.3 Examples of classes to change

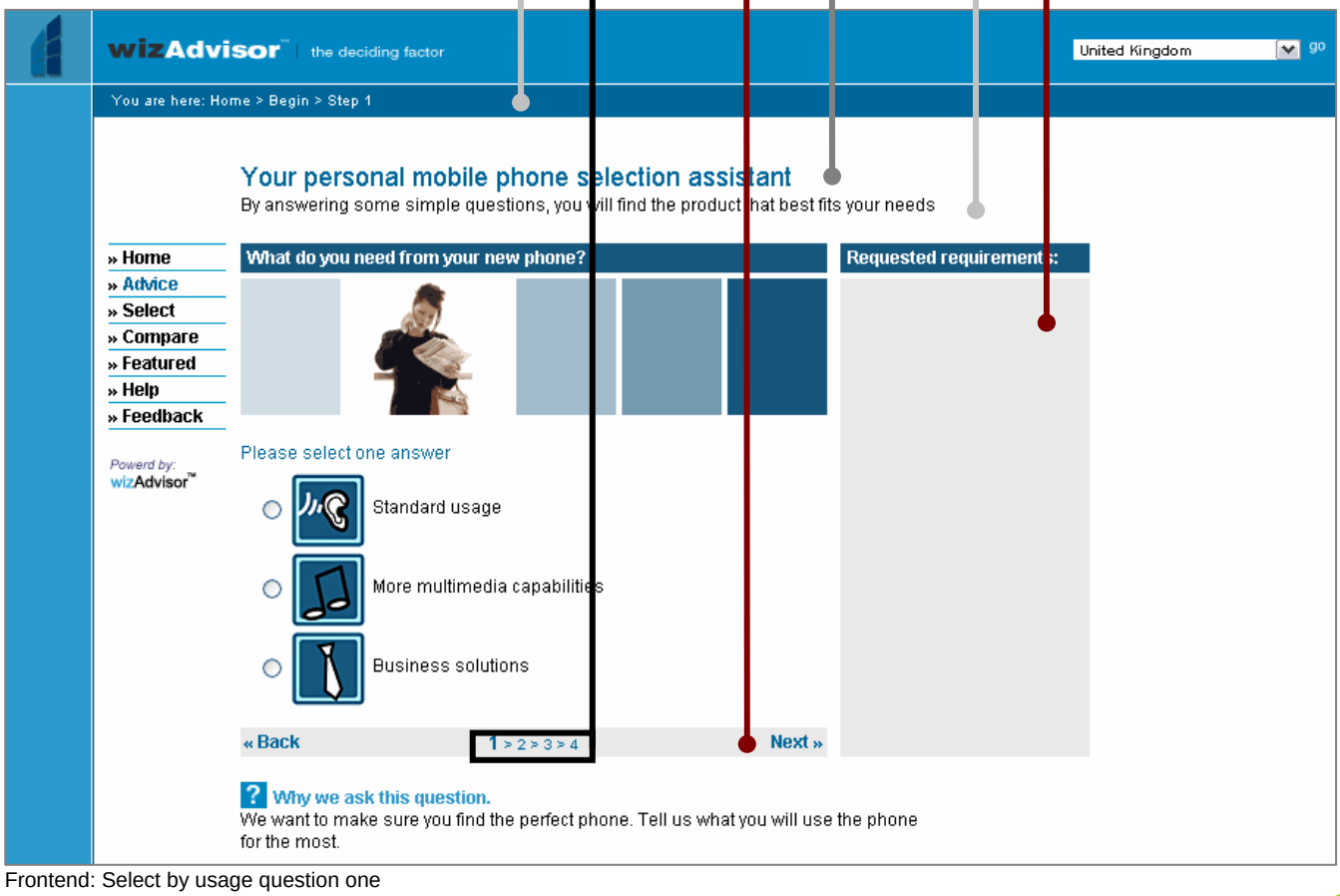
```
.blue-small, .blue-small:hover, .blue-small:active, .blue-small:visited{
    font-size: 10px;
    font-weight: bold;
    color: #006699;
}
.blue-big, .blue-big:active, .blue-big:hover, .blue-big:visited {
    font-size: 14px;
    font-weight: bold;
    color: #006699;
}
.title {
    font-size: 18px;
    color: #006699;
    margin-top: 30px;
}
.text {
    line-height: 14px;
    margin-bottom: 10px;

.small {
    font-size: 10px;
    color: #ffffff;
    background-color: #006699;
.graycolumn {
    background-color: #e9e9e9;
```

For even greater customization you can add properties to the classes / rules found within the style sheet.

Here are some examples of which classes change which areas of the frontend. There are many classes available for all areas. You should look into the source code for each page to find the correct class when making your layout changes.

If, for example, you change the .text class color property to red, all pages will display the subtitle in red. (All places where the .text class has been set in the HTML code)

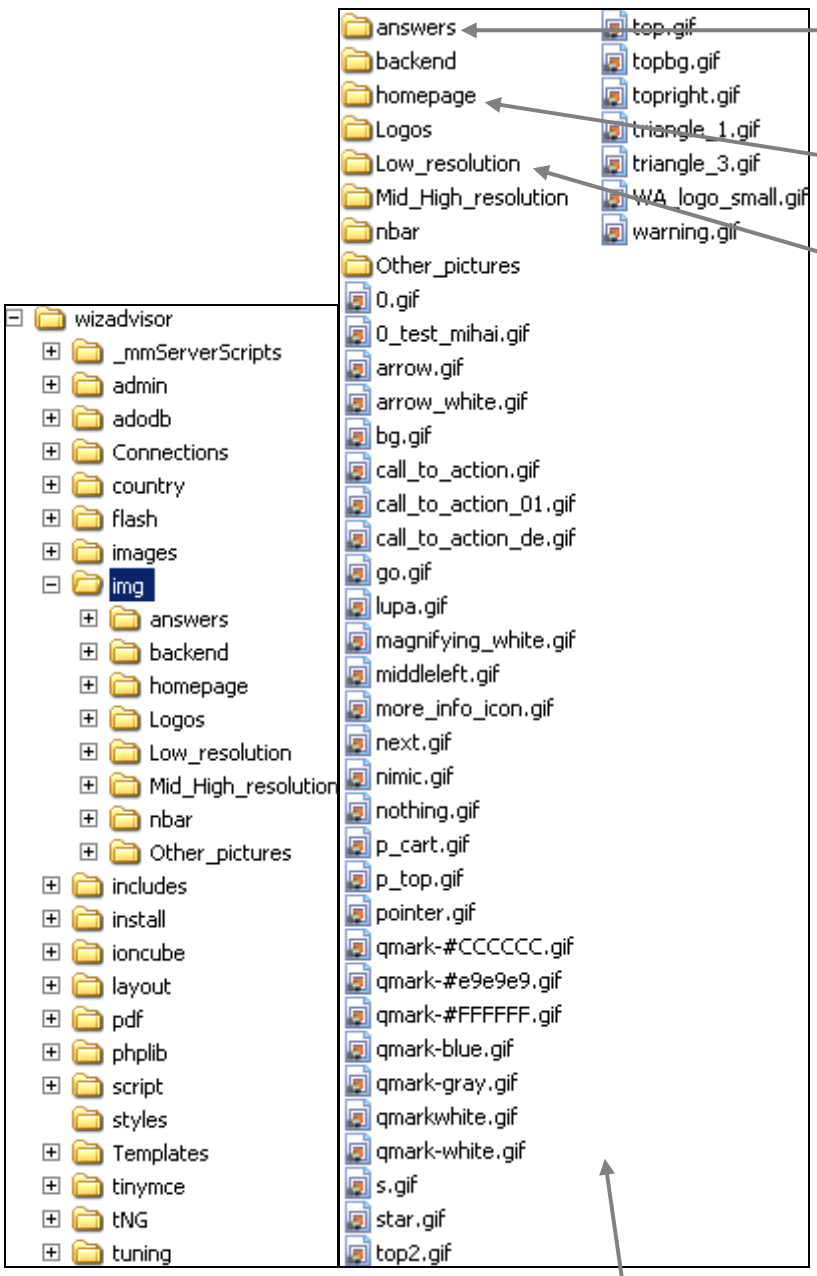


Frontend: Select by usage question one

10.4 Changing images

10.4.1 Where to find the images

All images can be found in the main WizAdvisor img directory. The main folder contains layout images, such as logos, question mark icons, triangle images (for the triangle question) etc... Within the main img directory you will find sub directories for other images such as Low_resolution and Mid_high_resolution for your product pictures.

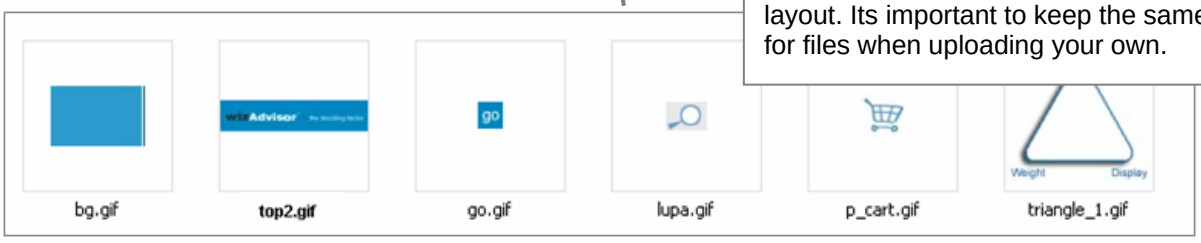


Other images are sorted in different folders. For fast uploading you can add images directly here. (instead of one at a time via the backend)

Note: To upload images simply drag and drop files or copy and paste them into the appropriate directories.

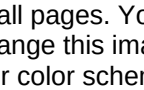
WA directory system located on your local computer / server / where the tool was installed.

The main img directory contains images for the layout. Its important to keep the same names for files when uploading your own.



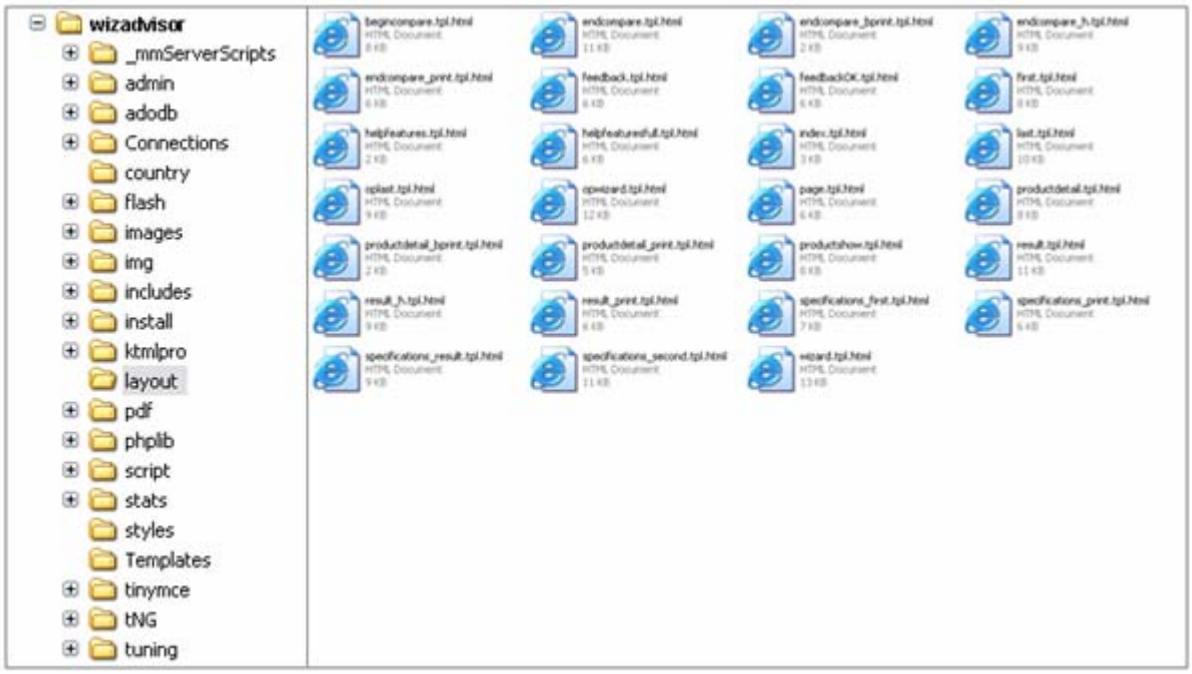
10.4.2 Main six images to re-design the layout

These are the six most common images to update. Changing just these will already re-design the tool to fit to your companies corporate style. From the screen shots on page 83 only these images and the style.css file were updated. You can also change question banner images, or question answer images (see page 21) to fully integrate your design requirements.

File name and size	Preview	Description
• bg.gif • 60x38 pixels		This image is used for the right hand bar that runs from the top to the bottom of all pages. Tip: you can make change this image size but if you make it wider then 60 pixels you will need to reposition the main menu.
• topbg.gif • 36x51 pixels		This image is used at the top of the page. It is duplicated all the way along. Tip: you should note that if you alter the height of this image it will be either shrunk or stretched to 51 pixels. You can make this image wider if necessary.
• top2.gif • 250x51 pixels		See page 81 to find out how to upload a logo via the backend. Tip: Image width can be changes but if you change the height, the image will be stretched to fit 51 pixels. This image is only displayed once at the top of every page.
• top.gif • 58x51 pixels		A small icon can be uploaded via the backend. See page 81. Tip: this image size should not be altered at all. Simply add a logo to a background color. If you don't want to have an icon just upload a plain image in the color of your choice.
• go.gif • 16x17 pixels		The go image is shown next to the country selection menu at the top of all pages. You may wish to change this image to match your color scheme.
• more_info_icon.gif • 18x18		There are several images/icons that use blue. You may wish to change all of them to match your design. ()

10.5 Structural changes

For advanced changes to the layout, for example if you want to reposition the menu or move the headings, you will need to update the template files. This should only be done by experienced web programmers. To avoid costly mistakes it is advisable to save a copy of the template files before making any changes. HTML template files are found in the layout directory.



WizAdvisor directory system located on your local computer / server / where the tool is installed.

11 WYSIWG-Editor

You will find information about the rich text editor used in the WizAdvisor backend on the following website:

http://tinymce.moxiecode.com/

---------- END ----------