

Customizable Product - FE

Vendor-Side Workflow for Form Creation and Assignment for Customizable Products

1. Access the Dashboard

Pages

- **Dashboard Features:**
 - View a list of all forms:
 - Form name.
 - Status: Draft, Published, Archived.
 - Last modified date.
 - Assigned product(s) (if applicable).
 - Actions:
 - Create New Form.
 - Edit, Duplicate, Delete existing forms.
 - Assign forms to customizable products via the PIM system.
 - Filters and Search:
 - Filter forms by status, product category, or assignment status.
 - Search by form name or product SKU.

2. Create a New Form

Pages

- **Start Form Creation:**
 - Click "Create New Form".
 - Enter basic details:
 - Form title.
 - Optional description (e.g., "Used for glass door configurations").
 - Assign a category (e.g., Doors, Windows).
- **Choose Initial Structure:**
 - Start from:
 - A blank form.
 - A pre-built template (e.g., "Door Customization Template").
 - Save initial form setup.

3. Manage Sections

Sections

- **Add Sections:**
 - Click "Add Section" to create logical groupings of fields.

- Examples:
 - **Section 1:** General Information.
 - **Section 2:** Material Selection.
 - **Section 3:** Dimensions.
 - **Section 4:** Features and Add-ons.
- **Reorder Sections:**
 - Drag and drop sections to adjust the order.
- **Customize Section Titles and Descriptions:**
 - Add section names and optional descriptions for better organization.

4. Add Fields

Form Fields

- **Drag and Drop Fields:**
 - From the field toolbox, drag desired fields into sections.
- **Field Types and Configurations:**
 - **Short Answer:**
 - Purpose: For text or numeric inputs (e.g., "Enter door width").
 - Add default values from the Default Specification List.
 - Apply validation (e.g., numeric range: 2ft to 10ft).
 - **Paragraph:**
 - Purpose: For long text inputs (e.g., "Describe your customization needs").
 - Set a character limit.
 - **Dropdown:**
 - Purpose: For single-option selection (e.g., "Choose door material").
 - Add options manually or dynamically link to PIM attributes.
 - **Radio Buttons (Single Choice):**
 - Purpose: For single-option selection (e.g., "Select door type").
 - Enable optional "Other" field.
 - **Checkboxes (Multiple Choice):**
 - Purpose: For multiple selections (e.g., "Select additional features").
 - Set a maximum number of choices.
 - **Linear Scale:**
 - Purpose: For ratings or preferences (e.g., "Rate priority for insulation").
 - Customize range and labels.
 - **File Upload:**
 - Purpose: Allow customers to upload images or files (e.g., "Upload a design reference").
 - **Date Picker:**
 - Purpose: For date selection (e.g., "Select delivery date").
 - Apply restrictions (e.g., no dates before today).
 - **Time Picker:**
 - Purpose: For time selection (e.g., "Choose installation time").
 - **Image with Text (Single Choice):**

- Purpose: Display images with labels for single selection (e.g., "Choose door style").
- **Image with Text (Multiple Choice):**
 - Purpose: Display images with labels for multiple selection (e.g., "Select additional design elements").
 - Limit the number of selectable options.
- **Multiple-Choice Grid:**
 - Purpose: Collect structured inputs (e.g., "Rate features by material").
 - Configure rows and columns dynamically.
- **Tick Box Grid:**
 - Purpose: For checkbox-based inputs in a grid layout (e.g., "Select applicable features").
- **Color Picker:**
 - Purpose: Allow customers to select colors visually (e.g., "Choose door color").
- **Signature Field:**
 - Purpose: Collect digital signatures.

5. Apply Conditional Logic

Pages

- **Set Conditional Logic for Fields:**
 - For dropdowns, radio buttons, or checkboxes, define conditions.
 - Example:
 - "If 'Material' = 'Glass,' show the 'Glass Thickness' field."
 - "If 'Door Type' = 'Double Door,' go to the 'Double Door Dimensions' section."
- **Define Section Navigation:**
 - Route users to specific sections based on their answers.
 - Example:
 - "If 'Door Type' = 'Single Door,' go to Section 2: Single Door Dimensions."
 - "If 'Other,' go to Section 4: Custom Requirements."

6. Preview the Form

Pages

- **Live Preview Mode:**
 - Test the form in real time as if you're a customer.
 - Simulate conditional logic and navigation flows.

7. Save and Publish

Pages

- **Save Options:**
 - Save as draft or publish immediately.
- **Generate a Shareable Link:**
 - Obtain a link for customers to access the form.

8. Assign the Form to Customizable Products via PIM

Pages

- **Access PIM System:**
 - Open the PIM module from the dashboard.
- **Locate the Product:**
 - Search for the product (e.g., "Glass Door").
 - View product details, including attributes like SKU, category, etc.
- **Assign the Form:**
 - Click "Assign Form" and select the relevant form from the list.
 - Save the assignment.
- **Verify the Assignment:**
 - Check the product details to confirm the assigned form is listed.

9. Monitor and Update

Pages

- **Track Submissions:**
 - View form responses linked to specific products.
 - Analyze data such as:
 - Most selected options.
 - Completion rates.
- **Edit and Update Forms:**
 - Make changes to published forms if required.
 - Reassign updated forms to products via PIM.
- **Unassign Forms:**
 - If a form is no longer applicable to a product, unassign it from the PIM.

Key Steps Summary for UI/UX Design

Pages

- **Dashboard:**
 - Centralized view of all forms and assignments.
- **Form Creation:**
 - Drag-and-drop interface with field configuration options.
- **Conditional Logic:**
 - Easy-to-use rules for field-based and section-based navigation.
- **Preview:**
 - Real-time preview with device-specific views.

- **PIM Integration:**
 - Assign and manage forms linked to customizable products.