Stages

This page describes the Concept Board element **Stage** (or also called "phase") and how they are used to structure the Questions and Answer Options of the advisor process into different steps.

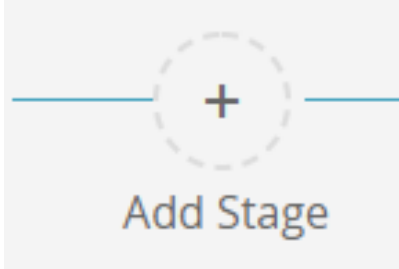Table of Contents:

Introduction

Stages are used to structure the advisor process. In most cases, a Stage addresses a specific topic of the Product Guide. Every Stage can contain one or more Questions. All created Stages are accessed in a sequence (1, 2, 3 ...) until the Recommendation Stage is reached.

> ✅ A Stage name in the "Bike Advisor" Product Guide could be "Person" and it could contain Questions about the person who will ride the bike.

Creating a Stage

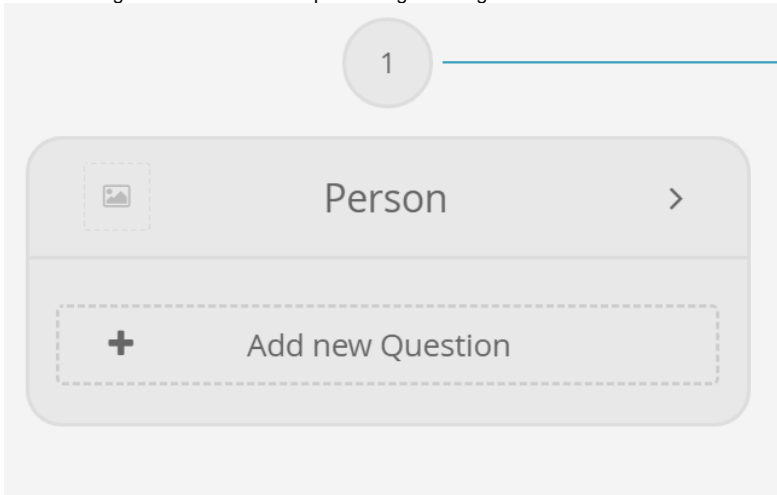1. Click the **"Add Stage" button** in the Concept Board.

2. This generates a text input field with the input prompt "**Enter the Stage name**".

3. Enter the Stage name, e.g. "**Person**".

> ℹ️ 💡 The Stage name should contain one or two key words. That serves as title for the underlying content and helps to navigate easier through the Stages.

4. After entering the name the card representing the Stage will look like this:

Stage Card Structure

The Stage card includes the following elements:

- A **number** at the top which signals the position of the Stage in the Product Guide.
- The entered **Stage name**
- A **"Reuse existing Question"** dropdown element which clones already existing Questions into the Stage (see Reuse Existing Question).
- An **"Add new Question" button** at the bottom. The button creates a Question card in this Stage.
- A **preview image** (left side). The preview image is only visible if the "Show Images" toggle is activated.
- A **clickable arrow** (pointing to the right side). Click on the arrow to open the Stage Properties where you can edit all parameters and the explanation content of the Stage.

Reuse existing Question

With this dropdown element, it is possible to copy an already existing Question and display it in this Stage too. This can be used e.g. for allowing the user to refine respectively change his selected Answer Options from the original Question in the live advisor.

Typically this copy process is used in the recommendation Stage where the user already sees the results and wants to improve the recommendations. Changing the answers initially changes the product recommendation result list.

> ✅ Typical Questions to show or repeat in the Recommendation Stage are Questions that have a strong impact on the result list. Thus answering them and testing their effect on the visual product recommendations can be a nice feature for your clients using your Product Guide.
>
> **Example Questions about:** Price, manufacturers, sizes or colors

Example

This is how a Stage can look like once you have entered 2 Questions with corresponding Answer Options:

Read on: Recommendation Stage or Questions and Answer Options