Product Configurator User Guide

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Date	Author	Version	Change
December 10, 2018	Insight Works	1.0	Initial version

1   Version Information

To check the current version of the product, navigate to Extension Management and scroll to the Product Configurator card.

2 Product Configurator Configurations

Product Configurator configurations are designed to create or find items based on user selection from pre-defined options and choices. Configurations consist of three levels:

1. Configurator Item Categories
2. Configurator Options
3. Configurator Option Choices

At the highest level are the configurator item categories which can have an unlimited set of configurator options which in turn can each have an unlimited set of configurator option choices.

For example, you may have a configuration for an item category of "Table" with an option for "Finish" that has option choices of "Oak" or Maple". Using the Configurator BOM Designer, users can create items designed for building tables consisting of oak or maple finishes.

2.1 Configurator Item Categories

Configurator item categories are linked to the item category used on the item card. The following fields are specified when creating configurator item categories:

Field	Description
Item Category Code	Specifies the item category for the configuration.
Description	Specifies the description of the item category. Its value is maintained on the item category card.
Data Template	Specifies the item template to apply standard settings to items created by the configuration.

Item Description Template	Specifies the template to create the description for items created by the configuration. If blank, the description of the item category will be used. Replaceable parameters can be used to create the item description. These parameters take the form {OPTION.Property}, where "OPTION" is the option code defined in configurator options and "Property" is one of the following properties:

Property Name	Value
Name	The option description
Choice	The option choice code selected
ChoiceNo	The option choice no. field
Desc	The option choice description
ItemDesc	The value of the option choice's item description
Quantity	The quantity per unit for the option

For example, an item description template such as "Table: {LENGTH.Quantity} FT, {FINISH.Desc} {DRAWER.ItemDesc}" could result in an item description of "Table: 6 FT, Oak with drawers".

No. Series	Specifies the number series that will be used to assign numbers to items created by the configuration.
BOM Type	Specifies the type of BOM that will be used for items created by the configuration. Options are either production, for which the configurator will also create the production BOM and routing, or assembly, for which it will also create the assembly BOM.
Base Routing No.	Specifies the base production routing that will be used for items created by the configuration. Only applicable when BOM type is production.
Choices Routing No.	Specifies the production routing that holds any optional operations to choose from. Only applicable when BOM type is production.
Default Item Dimensions	Specify the default dimensions that will be used for items created by the configuration.

2.2   Configurator Options

Configurator Options are linked to the item category and are the groups where users can select options for. The following fields are specified when creating configurator options:

Field	Description
Item Category Code	Specifies the link to the item category.
Code	Specifies the unique code for the configurator option.
Description	Specifies the description for the configuration option.
Display Order	Specifies the order in which the configuration options will be displayed in the Configurator BOM Designer page.
Mandatory	Specifies whether the configurator option must have an option choice selected for it.
Hidden in Configurator	Specifies whether the configuration option is hidden in the Configurator BOM Designer page.

2.3   Configurator Option Choices

Configurator Option Choices define the individual entities that can be used for each configurator option. The following fields are specified when creating configurator option choices:

Field	Description
Item Category Code	Specifies the link to the item category.
Configuration Option	Specifies the link to the configuration option for the linked item category.
Type	Specifies the type of entity for the configurator option choice. It can either be item, production BOM, resource, operation, text, or routing.
No.	Specifies the number of an item, production BOM, resource, operation from the choices routing, standard text, or routing, depending on the type.
Code	Specifies the unique code for the configurator option choice.

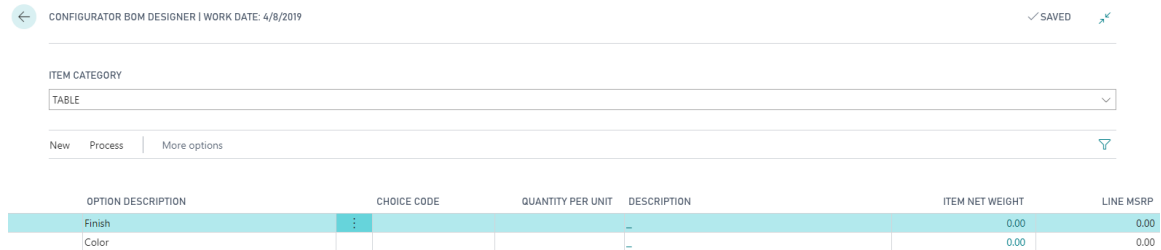| Description	Specifies the description for the configurator option choice.
Default Quantity	Specifies the default quantity when the configurator option choice is selected in the Configurator BOM Designer.
Unit of Measure Code	Specifies how each unit of item or resource is measured.
Routing Link Code	Specifies the routing operation to link items or text.
Parent Choice Code	Specifies additional entities to include in the configuration option.
Default Choice	Specifies the configuration option choice is the default for the configuration option.
Maximum Quantity	Specifies the maximum quantity for the configurator option choice that can be entered in the Configurator BOM Designer.
Add to Ext. Text	Specifies whether the entity will be added to the extended text for the item created.
Item Net Weight	Specifies the net weight for the item. Only applicable when type is item. Its value is maintained on the item card.
Unit Price	specifies the price for one unit. The value is used to calculate the MRSP price in the Configurator BOM Designer.
Update Unit Price	Specifies whether the unit price is updated from the current value on the item or resource card when selected in the Configurator BOM Designer. Only applicable when type is item or resource.
Resource Usage Type	Specifies how the resource cost is allocated when the assembly BOM is created. Only applicable when type is resource and the BOM type for the configurator item category is assembly.
Scrap %	Specifies the percentage of the item expected to be scrapped during the production process. Only applicable when type is item and the BOM type for the configurator item category is production.
Variant Code	Specifies the variant of the item. Only applicable when type is item.

Choices Routing No.	Specifies the production routing that holds any optional operations to choose from. Only applicable when type is operation and the BOM type for the configurator item category is production. Its value is maintained on the configurator item category.
Has Usage	Specifies whether the entity has been used on any configuration and is for information only.

3 Using the Product Configurator
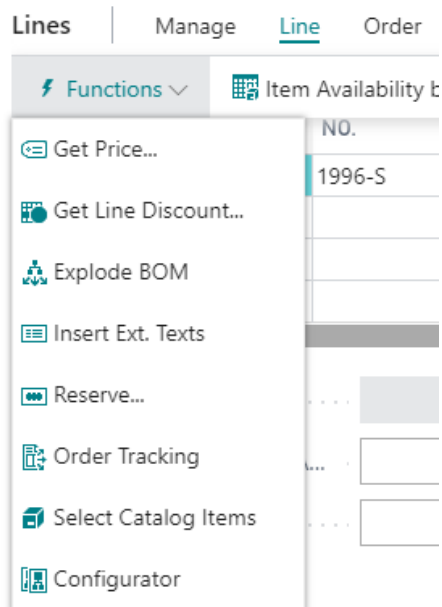
3.1 Configurator BOM Designer

Once the item categories, options, and option choices are set up, you can create or find items based on the configuration using the Configurator BOM Designer worksheet:

The user can either select an item category to load the available options in the page or click the Load Existing Item action to load the options and previously selected choices for an existing item. Once the options are loaded the user can choose or change the option choices as required. Clicking the Create Configuration action will create the item along with its BOM and, if applicable, its routing.

3.2 Sales Quote and Sales Order

The Configurator can also be launched from a sales quote or order. When run from a quote or order, the configurator item is directly associated with the sales line.

Once the user is finished in the Configurator BOM Designer, the user only needs to press the OK button to create or find the item and add it to the sales line.