User Manual

Product Configurator

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1   PREMISE

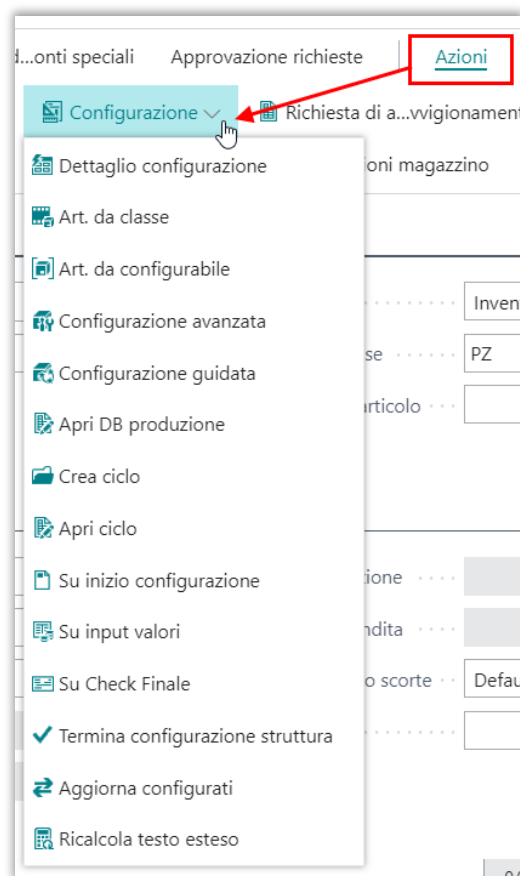The hereby document represent a user guide of the "Product Configurator" app.

2   APP SETUP

The configurator setup let you to setup the base rule you want to manage while using configurator.

The main setup items are:

- Configurator Setup
- Product Configurator Languages
- Base Characteristic
- Item Encoding Profile
- Characteristic Group
- Bill of Material Configurable Fields

The main function concerning configurator, connected with items, hence that do not deal with configurator setup, are contained in the Item list and also in the Item Card, under the menu **ACTION>CONFIGURATOR.**

Picture 1 – Section Item Configuration

2.1   Configurator Setup

In **Configurator Setup** card are hold different parameter that have to be setup. The latter are useful to setup the different functionalities for configurator. In Configurator Setup is also possible to **Enable Local Trace**, that you can use to trace the operation involved in the product configurator process.
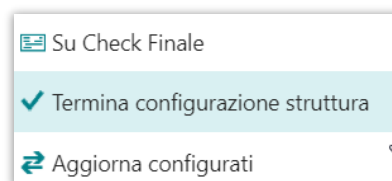
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Picture 2 - Setup Configurator Product

General Section Involved:

- **Activate Product Configurator**: ✔
- **Characteristic description on rule text**: ✔ ; → let you to see characteristic description, and not only characteristic code, in the rule text of define configuration ;
- **Model Characteristic Code**: fill the field after creating the model characteristic, but before the creation of the Characteristic Value Choices→ Model Characteristic represent also the characteristic used for configurable pricing.
- **Custom Product No.** → create and insert a serial number with the properties **default number active.**

Other setups concern:
- **Release Structure on Custom Item**: ✔ → let you to certify the entire structure of a custom item;
- **Document line configuration mood** → in this field you can choose the way for configuring an item in sales document. Is possible to choose **Wizard,** for commercial approach, or **advanced configuration** for a more technical view.
- **Hide not Mandatory Characteristic** → it let you to hide the non-mandatory (selected into the item class) characteristic during the configuration process of a configurable item. This help you to avoid error during the configuration process;
- **Configure all level on sale** → let you to configure all bill of material level for item created from a sales order. If the field is marked as true, it will possible to use configurate item after the configuration.
  In order to complete item configuration, in these cases, you have to select **Finish Configuration Structure;**

Picture 3 – Function End and Configure Structure

- **Auto refresh item on sale** → it determined the frequency and the mode of the refresh of a bill of material and of a production routing of a configured item already inserted into a sales order (preventing you to go into the configuration process). The different options of the fields are:
  - o **Always**: it always refreshes item structure, without asking any confirmation;
  - o **Never:** it never refreshes item structure, and it gives you back an error message if you use in a sales order an item with an update request. In this case you should go ahead in the sales order using the configurable item and not the configured one (the one that need an update);
  - o **Ask Confirm:** when you validate the item code into a sales order, BC will give back to you a confirmation message;
  - o **On Release**: it always refreshes item on sales, every time you release a sales order.
- **Routing Configuration Layout** → it determines the layout of configurable routing. (see How Configure a Production Routing). The different options are:
  - o **Single Task**: it shows you all the tasks involved without details.

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- o **Complete:** it shows all the lines involved in all task.
- ▪ **Not use characteristic for Excel Import →** in this field you can choose the 'not used' char for the import from excel of configurable item (see Import Item From Excel);
- ▪ **Item Extended Update**: ✔ → allow you to use extended text.

Picture 4 – Product Configurator Setup (Extended Text)

2.1.1 Configuration Trace

Configuration Trace, when activated, provides you a list of all the action, that have taken place during item configuration. It traces actions from manual input and the actions that take place because of rules setup. This functionality can be helpful to understand if rules are applied in the right way and order during configuration process; trace is helpful to understand, in case of errors during configuration process, where they have taken place.

There are two different options for configuration trace:

1. **Enable Trace**: when is ✔ it activates the trace for all users;
2. **Enable Local Trace**: it activates trace for single user. To disable it select **Disable Local Trace**.

You can view all trace movement selecting **Trace** from setup page, else checking **trace** from advanced configuration.

Picture5 – Trace Session

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2.2 Product Configurator Languages

In **Product Configurator Languages** page, you have to insert all languages you desire to manage with configuration translation.

Picture 6 – Configurator Languages

2.3 Profile

A new Profile is added to Business Central with the installation of the app: **APSCONFIGURATOR PROFILE**.

Picture 7-Configurator Profile

The profile provides a Role Centre page customized for the user that will deal with configuration.

Picture 8-Configurator Role Centre

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3   APP FUNCTIONALITIES

3.1   Base Characteristic

Base Characteristic are the basic elements involved in the configuration process and represent the item attribute that can be selected for each single item.

Codice ↑	Descrizione	Tipo Dato Caratteristica	Profilo di Utilizzo	Usa Scelte da Cod. Caratteristica	Cod. Gruppo Input di Default	Bloccato Utilizzo	Esistono Scelte Locali	Esistono Traduzioni	Stato	Grassetto
CATART	Item category	Scelta Tabellare	Configura Articolo			☐	Sì	Sì	Aperta	☐
C-BACKREST	Coating backrest	Scelta Tabellare	Configura Articolo	COATING(R)		☐	No	No	Aperta	☐
COATING(R)	Coating (REPOSITORY)	Scelta Tabellare	Configura Articolo			☐	Sì	No	Aperta	☐
CODART	Item number	Scelta Tabellare	Configura Articolo			☐	Sì	No	Aperta	☐
COLLECTION	Collection	Scelta Tabellare	Configura Articolo			☐	Sì	No	Aperta	☐
COLOR	Color	Scelta Tabellare	Configura Articolo			☐	Sì	No	Aperta	☐
C-PILLOW	Pillow coating	Scelta Tabellare	Configura Articolo	COATING(R)		☐	No	No	Certificata	☐
C-SEAT	Coating seat	Scelta Tabellare	Configura Articolo	COATING(R)		☐	No	No	Aperta	☐
FABRIC	Fabric	Scelta Tabellare	Configura Articolo	COATING(R)		☐	No	No	Aperta	☐
THREAD COL	Thread color	Scelta Tabellare	Configura Articolo			☐	Sì	No	Certificata	☐
TOPCOATING	Top coating	Scelta Tabellare	Configura Articolo			☐	Sì	No	Aperta	☑
TOPRAW	Top raw	Scelta Tabellare	Configura Articolo			☐	Sì	No	Aperta	☐
VENDOR	Vendor	Codice	Configura Articolo			☐	No	No	Aperta	☐
WOODRW	Raw wood	Scelta Tabellare	Configura Articolo			☐	Sì	No	Certificata	☐
WOODVR	Vanished wood	Scelta Tabellare	Configura Articolo			☐	Sì	No	Aperta	☐

Picture 9 – Base Characteristic List

A base characteristic is marked by the following elements:
- **Code**
- **Description**
- **Using profile:** it add boundaries on the use of the characteristic. It can assume the following value:
  - o   Item Configuration
  - o   BOM Line Configuration
  - o   Routing Line Configuration
  - o   Rule Action Condition Only
  - o   Rule Condition Only
- **Max length choice code:** it let you to boundaries the max length of the choice code;
- **Max length choice text item:** it let you to boundaries the max length of the item description;
- **Characteristic Data Type**: Could be:
  - o   Tabular Choice: values are taken from a specific list.
  - o   Numeric: is possible to assign decimal places (precision value) and min and max allowed value;
  - o   Code: is used for activate the field **BOM Table Type**
  - o   Date Formula: BC date formula (e.g. 1Y, 1W..)
- **DB Table Type**: define an external source (taken from BC) for characteristic.
  - o   Item: let you to configure field in item table(T27)
  - o   Customer: let you to get information from sales document
  - o   Sales Document: let you to get information from the sales document from where you are configuring item;
  - o   Bill of Materials Line: it let you to filled up fields concerning bill of materials;
  - o   Routing Line: let you to valorise fields in the table routing line.
- **BOM Field No.:** it refers to Bill of Material Fields (see Configurable Field)
- **USED BLOCKED:** is used for not tabular choice and with a value for Bill of Material field. If ✔ characteristic is not shown in local variable during configuration process. (see Advance Configurationa);

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- **Dependent Characteristic Exist:** il let the characteristic to use value of another characteristic. Usually a "repository" characteristic is created and after is associate to all characteristic
- **Use Choice By Characteristic Memo:** allow to impose filter to apply to the repository characteristic;
- **Cod. group default input**: determine the characteristic group, useful in configuration Wizard (see Characteristic Group);
- **Default Max Value**: maximum value for numeric characteristic;
- **Default Min Value**: minimum value for numeric characteristic;
- **Precision Value**: allow to define the decimal places in case of using numeric characteristic. (e.g. "0.01" means the max decimal places are two);
- **Update Item Extended Text:** if ✔ when released the characteristic BC will update extended text. It works just if the Extended Text field is true in configurator setup;
- **Bold:** when is ✔ characteristic code is Bold. Is helpful to understand the most important characteristic;
- **Status:** show if status is Open or Certified.

Picture 10 - Base Characteristic

3.1.1 Base Characteristic Choice

For **Tabular Choice Characteristic** is possible to define the list of specific value.

Picture 11 – Tabular Choice

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Below the fields involved into a Tabular Choice List:
- **Code**
- **Description**
- **Text For Item Description** → if filled is used as description for configurable/configurate item;
- **Custom Choice**→ when true marked the choice as custom value. When there is at least one custom choice will be created a custom item.
- **Translation Exist** → marked if the translation table for that choice is compile (base characteristic Choice>Translation).

- **Sequence** → let you to organize and to sort choices;
- **Numeric Index** → is used for tabular choice for assigning a value in Bill of Material and Routing;
- **Not Used in Extended Text** → just in case the setup "Refresh Extended Text" is True; when the value is True it let you to not include some choices into the extended text;
- **Linked Characteristic** → show if to that specific choice are linked specific characteristic. Is possible to connect specific characteristic to the value of other characteristic (for example with this functionality you can connected the choice Cover Colour to the Choice Smartphone Colour).

3.1.1.1   HOW: create a Characteristic

For Creating a Base Characteristic select NEW from the Base Characteristic.
Insert Code, Description, and the Other Setup.

3.1.1.2   HOW: create Characteristic Choice

From Characteristic Base Page select **Base Characteristic>Characteristic Choice**.
Filled Code and Description and complete setup.

3.1.1.3   HOW: Setup Characteristic Link

Go to the page of the First Characteristic (hence the one that determine the value of the other characteristics).

Select **Characteristic Links.**

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Picture 12 – Characteristic Link

In **Chacteristic Link** insert the Linked Characteristic Code. **Select Choices** for filling the values.

Picture 13 – Characteristic Choice Link

In the field **Input Value** insert the value you want to assign to the characteristic.

Picture 14 – Link Characteristic

NOTE: relationship among the two characteristic is fixed. Is not possible to modify the value of the link characteristic during configuration procedure.

3.1.1.4   HOW: setup translation for Base Characteristics and their choice

From the Base Characteristic Page select Characteristic Translation in order to setup characteristic translation, and translate Characteristic Choice for setup translation of its Choice.

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Picture 15 – Translation Action

3.2 Configurable Field

In the page **DB Field Selection** is possible to insert all the field you want to setup as configurable for the following tables:

- Item: fields will be configurate in configurate item;
- Customer: from the fields will be taken info for configuration process;
- Sales Document: from the fields will be taken info for configuration process;
- BOM line: marked fields will be filled up in the item that will be configurate;
- Routing Line: marked fields will be filled up in the item that will be configurate;

Picture 16 –Configurable Field

3.3 Item Characteristic Group

Characteristic Group are useful for group together characteristic during the use of configuration **Wizard**.

The field **Default Input Sequence** indicate the sequence in which you prefer to show the group.

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GRUPPI CARATTERISTICHE | DATA DI LAVORO: 4/1/2019

Codice ↑	Descrizione	Sequen. Input Default	Nota Standard
G1	Gruppo 1	100	
G2	Gruppo 2	200	

Picture 17 – Characteristic Group list

WIZARD DI CONFIGURAZIONE PRODOTTI

Page 1 of 2 - Ordine No. 101012 - Item: N.SNRCHAPF Sunrise chair

Group No. G1

Descrizione Caratteristica	Valore	Description	Val... Ob...	Scelta Cus...	Note In
Coating backrest	C006	Coating 006	☐	☐	
Coating seat			☐	☐	

Indietro | Avanti | Riepilogo | Fine

Picture 18 – Configuration Wizard With Group

3.4   Item Encoding Profile

Encoding profile let you to define the structure of item code and item description of configurable Item. This determine the code assign to an item once the configuration procedure is done.

PROFILI CODIFICA ARTICOLI | DATA DI LAVORO: 4/1/2019

Codice ↑	Descrizione	Tipo Codifica Articolo	Nr. serie	Mask Codice Articolo	Mask Progressivo Art.	Tipo Progressivo nel Mask	Mask Descrizione Articolo	Mask Descrizione Articolo 2
ART.CNF	Configurable items	Mask Codifica		N.[CODART]			[CODART]	
ART.SPC	Custom items	Mask Codifica		[CODART]/C[CNT]	0000	Check Codifica	[CODART]	
ART.STD	Standard items	Mask Codifica		[CODART]/[CNT]	0000	Check Configurazione	[CODART]	

Picture 19 – Item Encoding Profile

The encoding structure can be defined by:
- No-Numeric Characteristic Value
- Constant
- Sequence

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Item Mask Code → this field have to be filled up with the formula used to build up the item code. Characteristic Code have to be used in square branch (es. "[]"). The value "[CNT]" represent a counter for a progressive coding.

Referring to the picture above, the code "ART.STD" is build up in the following way:
- o   Characteristic Value "[CODART]"
- o   Fixed Text "/"
- o   Counter: [CNT]
- o   The length of counter is defined in the field item counter mask.

Item Mask Description → here you build up the mask for the construction of the description of item;

Encoding code must be assign in each **Configuration Class.**

3.5   Configuration Class

Configuration Class is the tool that put together characteristic and rules that you can apply to an item or to a group of item.

With configuration class you can define the order in which characteristic and characteristic group are presented in configurable and configurate item. It also contains item encoding profile.

Configuration Class let you to:

- ▪   Divide product into class. The relationship among product and class could be 1:1 or 1:n;
- ▪   Decide which are the main characteristics and impose default value for each characteristic;
- ▪   Classify item using default value of characteristic.
- ▪   Search items using criteria as item class/characteristic/characteristic Value;

Nr. ↑	Descrizione	Cod. Profilo Codifica Art.	Descr. Profilo Codifica Art.	Stato
CHAIRS	Chairs	ART.STD	Standard items	Certificata
CHAIRS BACKR...	Chairs backrest	ART.STD	Standard items	Certificata
CHAIRS RAW B...	Chairs raw base	ART.STD	Standard items	Certificata
CHAIRS VARN. ...	Chairs varnished base	ART.STD	Standard items	Certificata
CHARIS SEAT	Chairs seat	ART.STD	Standard items	Certificata
FABRIC	Fabric	FAB.STD	Fabric standard items	Certificata
PILLOW	Pillow	ART.STD	Standard items	Certificata
PILLOW SF	Pillow semifinished	ART.STD	Standard items	Certificata
SMARTPHONE	Smartphone	IPHONE.STD	Iphone standard	Aperta
TABLES	Table class	ART.STD	Standard items	Certificata
TABLES RAW B...	Tables raw base	ART.STD	Standard items	Certificata
TABLES RAW T...	Tables raw top	ART.STD	Standard items	Certificata
TABLES VARNI...	Tables varnished base	ART.STD	Standard items	Certificata
TABLES VARNI...	Tables varnished top	ART.STD	Standard items	Certificata

Picture 20 – Configuration Class List

In tab General, you find the following elements:
- ▪   **Class No.**

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- **Class Description**
- **Configurable Item Encoding Profile Code**→ define how will be codified configurate items of this specific class;
- **Item Encoding Profile Code** → define how will be codified configurable items of this specific class;
- **Custom Item Encoding Profile Code** → define how will be codified custom items of this specific class;

In tab **Details** the peculiar fields are:
- **Usage Note** → for an additional description in the item class;
- **Automatic insert item in configuration** → is usually active ✔. When unable in case the bill of material you are codifying needs a component from that specific class, and the latter is not codified yet. This avoid to create new item when you deal with configurable bill of material.

Tipo di messaggio		Descrizione Caratteristica	Cod. Caratter. Dipendente	No... Car... Dip...	Testo Messaggio
→ Errore	⋮				Non Esiste Articolo conf.to su configurabile N.SNRCHASL01.

Picture 21 – Error Components in bill of Material

- **Admit Item Created by Characteristic Configuration** → let to use the function Manage Combination, for technical configuration. (see Multiple Configuration)
- **Exclude Custom Item** → if ✔ doesn't allow to create custom item;

Messaggi Configurazione

Tipo di messaggio		Codice Caratteristi...	Descrizione Caratteristica	Testo Messaggio
→ Errore	⋮	C-BACKREST	Coasting backrest	La classe di configurazione CHAIRS BACKREST non permette articoli CUSTOM.

Picture22 – Error Exclude Custom Item Use

- **Hide not mandatory characteristic** → if this field is non active in configurator setup, when true in the class let you to hide not mandatory characteristics for that specific class;
- **Exclude not used characteristic** → if ✔, not used characteristic are not reported on item configuration details.

CHAIRS

📇 Certifica   🔄 Riapri   🔍 Lista Articoli per Classe | Azioni   Meno opzioni

📇 Certifica   🔄 Riapri   🔍 Lista Articoli per Classe

Generale

Nr.	CHAIRS	Cod. Profilo Codifica Art.	ART.STD
Descrizione	CHAIRS	Cod. Profilo Codif. Art. Custom	ART.CST
Cod. Prof.Codifica Art. Conf.le	ART.CNF		

Picture 23 – Configuration Class Header

Tab **Default Item** contains information that will be copy on configurable item that will come from that specific class.

Some fields are:
- **Rounding Precision**: refer to rounding precision in item card, usually is setup as 1;

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- **Default Item Template**: represent standard item template to apply to the configurable item; using this field you can easily apply unit of measure, reordering policy..);

Default Articolo

Precisione arrotondamento	1	Modello articolo di default	ARTI000001
Metodo consuntivazione	Manuale	Nome modello articolo di default	Articolo
Nr. Ciclo Base		Critico	
Fuori Listino			

Picture 24 - "Default" section configuration class

In Characteristic Section there is the list of all the base characteristic that will be apply to the item connected to this class. For each characteristic you can define also the following fields:

- **Item Group Code** → in case you want to deal with group;
- **Characteristic Sequence** → represent the proposal sequence of the value in the class;
- **Choice Filter** → you can limit the choice of specific characteristic applying filter. For example, using **C*** as filter, the system will show just choice starting with **C***. ;
- **Mandatory on Fixed Item** → if ✔ it won't be possible to complete configurable item if that value is blank;
- **Mandatory on Configurate Item** → if ✔ it won't be possible to create a new item without the value of that specific characteristic;
- **Not Used** → if ✔ flag not used will be in characteristic line. The not used characteristic will not be asked during configuration process.
- **Default Value** → let you to assign a default choice of the characteristic; it can be modified during configuration;

Caratteristiche | **Gestione**

➕ Nuova riga ✖ Elimina riga

	Codice Caratteristica		Descrizione Caratteristica	Cod. Gruppo Input	Sequen. Caratt. ↑	Filtro Scelte Locale Memo	Valore predefin...	Obbligo su Art. Conf.to	Obbligo su Art. Conf.le	Valore min.	Valore Max
→	COLLECTION	⋮	Collection	G1	10			☑	☑	0	0
	CODART		Item number	G1	20			☑	☑	0	0
	CATART		Item category	G1	30			☑	☑	0	0
	C-BACKREST		Coating backrest	G1	40		C006	☐	☐	0	0
	C-SEAT		Coating seat	G1	50			☐	☐	0	0
	WOODVR		Vanished wood	G2	60	C*		☑	☐	0	0

Picture 25 - Characteristic

In configuration class you also have the possibilities to setup configuration rule (see Configuration Rules).

Once completed setup or once modified configuration class, you have to change the status in certified, using the action **Certificate**.

CHAIRS

📋 Certifica 🔄 Riapri 🔍 Lista Articoli per Classe

Funzioni ⌄ Certifica (F9) stato ⌄

Picture 26 – Certificate

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3.5.1.1 HOW: create configuration class

From Configuration Class List click on **NEW**.

Picture 27 – Insert New Class

Compile the card as indicate in the chapter Configuration Class.

3.5.1.2 HOW: assign input group to characteristic

When class status is **Open**, before assigning characteristic group (in characteristic line) go in **Action>Function>Characteristic Group Input** and insert the group that will be used to that specific class. You can also indicate **default input sequence;** when using configuration wizard classes with the smallest sequence number will be the first to be shown**.**

Picture 28 – Characteristic Input Group

Picture 29 – Characteristic Input on Class

After this is possible to associate single characteristic to specific group.

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Codice Caratteristica		Descrizione Caratteristica	Cod. Gruppo Input
→ COLLECTION	⋮	Collection	G1
CODART		Item number	G1
CATART		Item category	G1
C-BACKREST		Coating backrest	G1
C-SEAT		Coating seat	G1
WOODVR		Vanished wood	G2

Picture 30 – Input Group

3.6   Configurable Item

Configurable items are starting item for creating configurate item. Configurable items are created from the configuration class, using specific function.
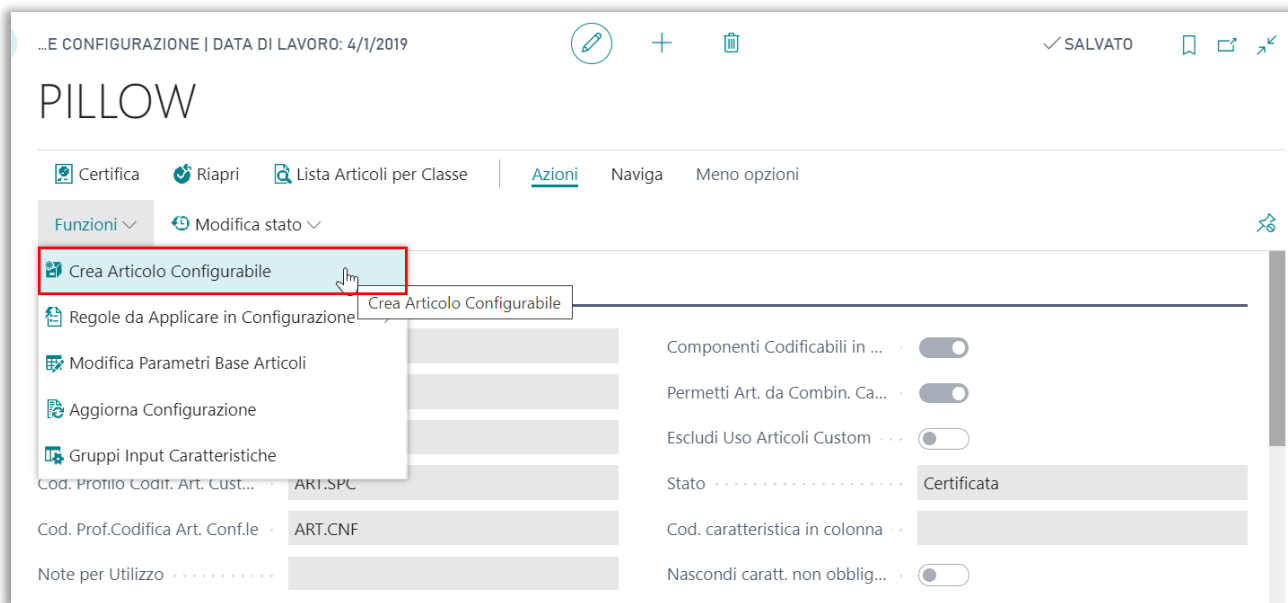A configurable item is built up in the following way:

- Takes from class characteristic and their default value;
- Is possible to pre assign specific value to characteristic already present in the class. The latter represent a pre- configuration of some characteristic comparing to the configurable one;
- **Is not a product managed by Supply Chain;** the item is not usable in sales document;
- Is possible to assign specific information as you do with item;
- You can assign to configurable item specific configuration rules (see Assign configuration rules);
- From configurable item is possible to create configurate item.

A configurable item, in **Configuration** section, in item card will present:
- **Configuration Profile**: Configurable;
- **Configuration Class No**: contains item class;
- **Configurable Item No**: blank;
- **Pattern Entry No**: represent the unique value that identify configuration and represent the connection among item table and configuration table;
- **Custom Item**: blank.

3.6.1.1   HOW: create configurable item

From a configuration class that present status Certified select **Action>Function>Create Configurable Item.**

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Picture 31 – Create Configurable Item

In Configuration Wizard will be propose all the Characteristic in the configuration class (if hide non mandatory characteristic is active, the latter will not show).

Picture 32 – Create Configurable Item

Passage in the picture are the following:

<u>PHASE1</u>

In the field **Value** insert the value of the characteristic you want to assign to the configurable item.

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There are three different type of characteristic:
1. Mandatory Characteristic: if any blank the configuration check will give back an error;
2. Characteristic for item encoding mask: in case some characteristic take part of encoding profile, they must be compile;
3. Not Mandatory Characteristic: is possible to pre-configure characteristic even if they are not mandatory.

NOTE: all the pre configurate characteristic will not be ask during the configuration process. Usually are characteristic that define the type of product you are dealing with (finished product, raw material) or the collection.

Flag not used if ✔, let you to put to the configurable item not used value (see Configuration Detail). This field is useful to manage different number of characteristic for the same class. If flag the characteristic will not show while configurating item.

PHASE 2

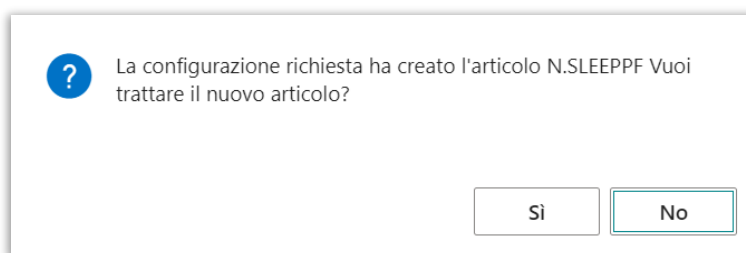Once compile all the characteristics, click on Check Configuration. This will give back the following message:
▪ "Executable" if configurate item is ok;
▪ "Attention" in case there are alert message;
▪ "Error" in case of error; errors can be checked in configuration message.

Picture 33 – Configuration Message

PHASE 3

Once check the configuration, click on **Confirm and Exit**. BC will propose you to open the configurable item and deal with it.

Picture 34 – End of Configuration Message

Configurable item will be always blocked, and it will not possible to use as a standard item.

3.6.2   Create Configurable Item Using Import to Excel Function

It is possible to create configurable item using import from excel function.
For importing item using excel:
▪ Base Characteristics and their choice have to be inserted in BC;
▪ Configuration Class must exist in BC and they must have their status as release;
▪ Not Used Characteristic Symbol have to be filled up in configurator setup; (see Configurator Setup)

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Excel file must be build up in the following way:

First three column of the Excel file (**A, B, C**) are fixed for every import. In particular, **column A** and **column B** are descriptive column; user can use them for reference of the item. **Column C** MUST contain configuration class from where the item is created.

From **column D** you have to insert all the characteristic of the configuration class indicated in column C. The label of Characteristic can be inserting in raw 3 (note that during the import you can change Label Column).

Import from excel doesn't impose you to create one excel sheet for each class, but you can put different class in the same excel sheet. Anyway is advised to create different sheet, so proceed with different import for each class.

Below an example of the file:
- Cells representing characteristic of that specific configuration class have to be compile;
- Inserting a value for a specific characteristic means pre-configure the item;
- For define Not Used Characteristic used the symbol setup up in configuration setup for not used character symbol;
- If a celli s empty:
  - You have to choose the characteristic value during item configuration;
  - If the characteristic class do not have that specific characteristic, the import won't take into account that cell. That means that is possible to insert more than one class into the excel file.

	A	B	C	D	E	F	G	H
1								
2						CARATTERISTICHE		
3	Cod.Padre	Descrizione	Classe	Model	Camera	Color	MEMORY	SCREEN
4	A001	SP01	SMARTPHONE	PH2	2	BLK	64	GLS
5	A002	SP02	SMARTPHONE	PH3	3	RED	128	GLS
6	A003	SP03	SMARTPHONE	PH3	2	-	256	CRM
7								
8								

Picture 35 – Import Configurable Item

For running this procedure search Import Configurable Item; in the page, select **import from Excel**.

Select:
- Line No with characteristic code (3 as default);
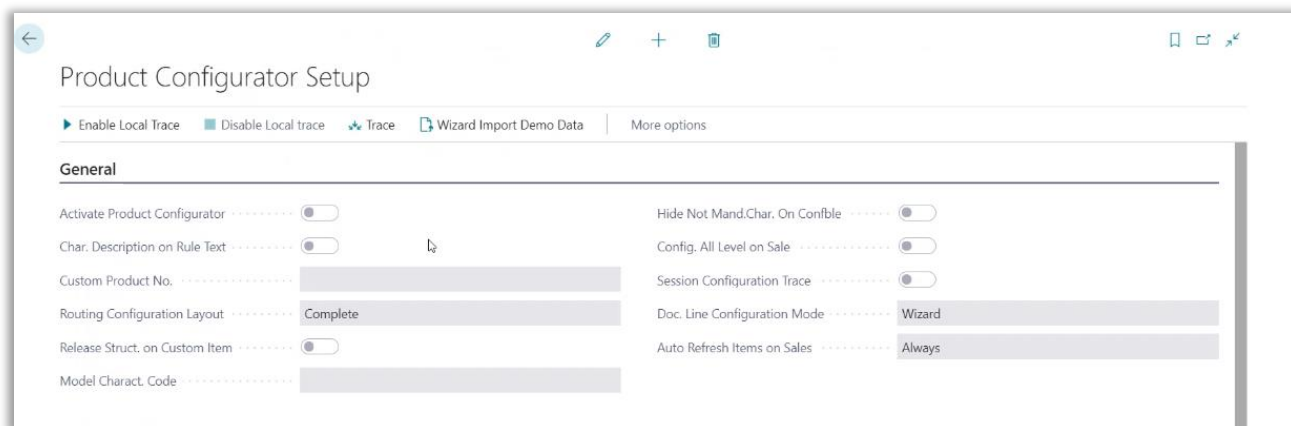- Excel File Name;
- Excel Sheet Name.

In case of error, they will be reported into di error field.

Select **Create Configurable Item** to complete the procedure.

3.6.3   Import Wizard

In configuration setup is possible to proceed with a Demo Wizard that import for you:

- A rapid Start with all value need for using configurator and configure item
- An Excel contains data for creating configurable item using Import Excel Procedure.

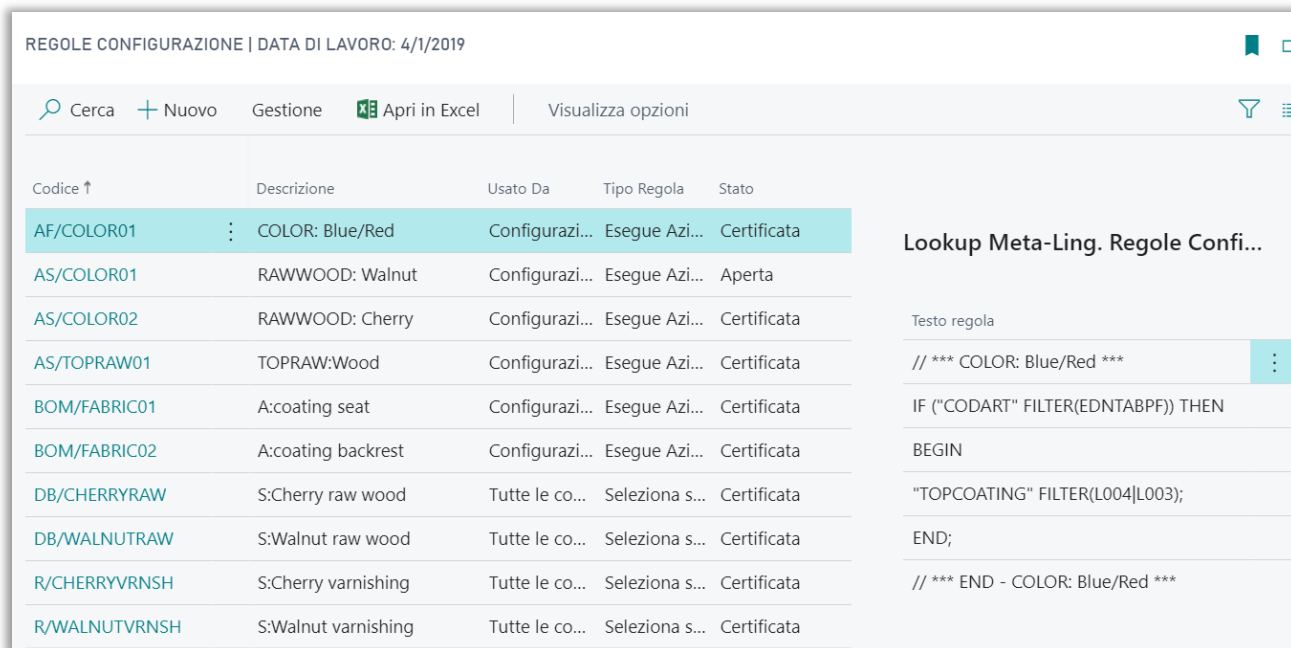powered by

Picture 36– Import Wizard Demo Data

3.7   Configuration Rules.

Configuration Rules can be applied in:
- Item Configuration
- Bill of Material Configuration
- Routing Configuration
- Option Sales Price
- Rules group to apply in sequence.

Configuration Rules Let to:
- Define the relationship among characteristics and their value. Thanks to rule you can:
  o Limit characteristic value;
  o Make mandatory/optional the input of value concerning other characteristic;
  o Assign value of other characteristic;
  o Able or Unable specific characteristic of product;
- Define criteria to build up BOM, routing, pricing of a product on the base of the value of specific characteristic.

Picture 37 – Configuration Rule List

A rule is composed by header and line.

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In the header the main elements are:
- **Code**
- **Description** → usually description have to explain what the rule does, so can be easily used in different areas;
- **Used By** → defines a rule application area.
  - o **Item Configuration** → the rule is applied to characteristic value during configuration process;
  - o **Bill of Material Configuration** → the rule is applied while you build up configuration of bill of material;
  - o **Configuration Routing** → the rule is applied building up routing;
  - o **All configuration** → this rule can be applied to different areas. An example can be rule filter (rules type: execute action) that can be applied on option prices and on item configuration or rules for both routing and bill of material;
- **Rule Type** → represent the behaviour of the rule.
  - o **Execute Action** → trig the rule in an independent way or with one condition.
  - o **Select just if condition is TRUE** → let to define condition that if are true, trig specific selection. This type of rules are used for routing and bill of material.
  - o **Rules Group** → a rules contains other rules.
- **Use Original Characteristic Value** → if ✔, pre configurate characteristic choice will be stronger compare to the ones set up by rules;
- **Status** → for being assign, a rule must be certified.

Generale

Codice	AF/COLOR01	Usata da Applicazioni	⬤
Descrizione	COLOR: Blue/Red	Usata da Gruppo Regole	⬤
Usato Da	Configurazione articolo	Usata da Righe DB	⬤
Tipo Regola	Esegue Azioni	Usata da Azioni Ciclo	⬤
Note per Utilizzo	A:EDEN	Usata da Prezzi Vendita Opz...	⬤
Usa Valori Originali Caratter.	⬤	Stato	Certificata

Picture 38- Configuration Rules Header

Line selection can be of four different type.

📄 Azioni Prima   📄 Condizioni   📄 Azioni Dopo   📄 Sequenza Regole

Picture39 – Rules Action

A rule can have these different elements:
- **Action Before** → action unconnected with specific condition (e.g.: starting value for configuration);
- **Condition** → constrain for the action in the rules (e.g..: test on one or more value of the characteristic);
- **Action After** → action to execute on characteristic in case one condition is TRUE or FALSE;
- **Rules Sequence** → rules list to execute in order. Can be applied just if the rules is Group of Rules.

3.7.1.1   HOW: setup condition for Rules

Conditions:

1. Can be useful for determine if a characteristic contains specific value.

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In the picture below you read: to the characteristic WOODVR apply filter W* (in the section apply filter you can use all the filter character you have in BC)

		Codice Caratteristica	Descrizione Caratteristica	Condizione	Applica filtro
→	☐ ⋮	WOODVR	Vanished wood	**FILTER**	W*

Condizioni | Gestione

2. Is possible to compare two different characteristic.
In the picture below you read: "if the value of characteristic C-BEACKREST is equal to the value C-SEAT.
"Se il valore della caratteristica C-BEACKREST è uguale al valore della caratteristica C-SEAT.."

Condizioni | Gestione

		Codice Caratteristica	Descrizione Caratteristica	Condizione	Cod. Caratter. Confronto	Descrizione Caratteristica
→	☐ ⋮	C-BACKREST	Coating backrest	**=**	C-SEAT	Coating seat

3. Can be combine together with AND/OR.
In the picture below "if the characteristic CODART is filter with EDNTABPF AND colour characteristic is FILTER BLUE.".

Condizioni | Gestione

		Codice Caratteristica	Descrizione Caratteristica	Condizione	Applica filtro	AND / OR
→	☐ ⋮	CODART	Item number	**FILTER**	EDNTABPF	**AND**
	☐	COLOR	Color	**FILTER**	BLUE	'

3.7.1.2   HOW: setup action on configuration rules

You have different kind of actions, based on the value Action Type. Option are the following:

1. **Choices Filter →** apply filter to the possible value. Filter Selection have as value Included and Excluded.
Apply Choice Filter show the value that will be shown (included) or not showed (excluded).

Azioni Dopo | Gestione

	Applica se Condizione è		Tipo azione	Codice Caratteristica	Descrizione Caratteristica	Filtro Scelte da Applicare	Selezione Filtro
→	VERA	⋮	Filtra Scelte	C-BACKREST	Coating backrest	C003|C005	Inclusi

powered by

2. **Assign Value** → Assign a specific Value. Field **Apply Only if Null** if ✔, avoid that the trigger of previous rule overwrite a value assigned before. The field **allow modification Value,** let you to modify the value assign during   configuration.

Azioni Dopo		Gestione					
Applica se Condizione è		Tipo azione	Codice Caratteristica	Descrizione Caratteristica	Formula Calc. / Assegna Valore	Applica solo se NON valorizzata	Permetti Modif. Valore su Assegn.
→ VERA	⋮	Assegna Valore	C-BACKREST	Coating backrest	C002	☑	☑

3. **Assign Characteristic** → assign to a characteristic a value based on another characteristic (the one in the field   assigned   characteristic   name);

Azioni Dopo		Gestione				
Applica se Condizione è		Tipo azione	Codice Caratteristica	Descrizione Caratteristica	Cod. Caratter. Assegnata	Nome Caratteristica Assegnata
→ VERA	⋮	Assegna Caratteristica	C-BACKREST	Coating backrest	C-SEAT	Coating seat

4. **Calc. Formula** → assign a value define in a formula, that let to use variable value of every characteristic;
5. **Error** → give you back a blocked error while configure the value;

Azioni Dopo		Gestione	
Applica se Condizione è		Tipo azione	Testo Messaggio
→ VERA	⋮	Errore	Questo è un messaggio di ERRORE.

6. **Attention Message** → give back an attention message while configurate the value;

Azioni Dopo		Gestione	
Applica se Condizione è		Tipo azione	Testo Messaggio
→ VERA	⋮	Messaggio Attenzione	Questo è un messaggio di ATTENZIONE

7. **Create Constrain** → select characteristic become mandatory;

Azioni Dopo		Gestione		
Applica se Condizione è		Tipo azione	Codice Caratteristica	Descrizione Caratteristica
→ VERA	⋮	Crea Obbligo	C-BACKREST	Coating backrest

8. **Enable/Disable Characteristic** → allow to hide or unhide a characteristic in configuration wizard;

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3.7.1.3 HOW: create a selection rules in item/bill of material /routing

Selection rule in bill of material or in routing present the following choices:

- **Used By**: **Configuration BOM** for Bill of Materia Selection Rules, Configuration Routing for Routing Configuration Rules;

- **Configurazione ciclo** per regole di selezione ciclo;

- **All configuration** for rules that can be applied in both cases;

- **Rules Type**: select if condition is TRUE;

<u>This type of rules presents only condition and no action.</u> Action is defined when you apply rule in bill of material and routing.

3.7.1.4 HOW: create an action rule on Bill of Material Line

This rule are useful to assign value to characteristic of item in production Bill of Material. With configurator you assign all characteristic from configurable to configurate item. The only way to assign different value or to use in derivate item characteristic that are not presented in principal item is to use trasmission rules in bill of material. (see Assign rules).

These rules have the following parametrization:

- **Used**: **Bill of Material Configuration;**
- **Rule Type**: **Execute Action;**

They could be direct assignment and so present just **action before,** or present **condition** and so **action after.**

Action will be of type **Assign Value or Assign Characteristic.**

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3.7.1.5 HOW: create a group of rules

Group of Rule present the following setup:

- **Used By**: **BOM Configuration** or **Routing Configuration or All Configuration;**
- **Rule Type**: **Rules Group;**

Selecting the action button **Rules Sequence**, you have the list of action. In this list you have to insert all the rule you want to associate to the group.

NOTE: rules group work with sequence rules.

3.7.2 Assign Configuration Rule

Rule can be assign to:
- **Configuration Class** → in this case are applied to all product create from configuration class;
- **Configurable Item** → if assign to this level, are stronger comparing to rule apply to class and are valid just on item;
- **Option Price List**→ determine condition for applying price and price increase/decrease; (see Option Sales Price Option)
- **Bill of Material Line** (see Configurable Bill of Material);
- **Routing Configuration** (see Configuration Routing)

powered by

3.7.2.1   HOW: assign rule to configuration class.

For assign rule to configuration class, class status have to be **Open.**

Rule application can be activated in three different moments:
1. **On Begin Configuration** → rules in this list are applied on the beginning of configuration;
2. **On Input Value** → rules of this list trigger when each characteristic is inserted;
3. **On Final check** → rules are applied at the end of configuration, once the check is done; (could be use to execute rule that assign value to characteristic that have a relationship with the assign characteristic) (see Advance Configuration)

Picture 40 – Assign Rule on Class

3.7.2.2   HOW: assign rule to configurable item

For associate a rule to a configurable item, go into item List, select configurable item, then action and configuration. There are three different application way:
1. **On Init Configuration**
2. **On input Value**
3. **On final Check**

Rules assign to configurable item are stronger comparing to the one assign on configuration class.

3.8   Configurable Bill of Material and Transmission Principal

Using Configurator, principal item convey all its characteristic on the derivate item. That means that configurable item that works in bill of material line, presented the same characteristic of principal item, or at least a subset, but never different characteristic. We can define this way of work as "transmission principle", with the hypothesis that all the characteristic of derivate item must be filled up.
When a derivate item has mandatory characteristic it looks for them in principal item and in case it will not find it will give back an error.

Anyway some exeption exist and let to assign different characteristic to the derivate item (see Create action rule for bill of material s).

Usually, configurable bill of material, associate to configurable item, are configurable:
Configuring Bill of Material let you:
1. Used Configurable Components;
2. Apply rules that include item in the bill of material (see Create selection item rule in bill of material/routing) ;

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3. Define formula that used characteristic in their definition;

Tipo	Nr.	Descrizione	Quantità per	Cod. unità di mis...	% scarto	Cod. collegamento tra ciclo e distinta base	Profilo Configur.	Regola Test Presenza Riga	Reg. Azio...	Formula Quantità per
Articolo	N.EDNTABSL04	Eden raw base	1	PZ	0	GEN	Config.le		☐	
Articolo	SCREW	Screw	1	PZ	0	GEN			☐	[WOODRW]*2
→ Articolo ⋮	CHERRYWOOD	Cherry wood	1	MC	0	GEN		DB/CHERRYRAW	☐	
Articolo	WALNUTWOOD	Walnut wood	1	MC	0	GEN		DB/WALNUTRAW	☐	

Picture 41 – Configurable Bill of Material Line

In the picture above:
1. Item N.EDNTABSL04 - Eden raw base is a configurable item in the bill of material that will have part of the characteristic of its principal item;
2. Item "CHERRYWOOD – Cherry wood" takes part in the bill of material if rules "DB/CHERRYRAW" is TRUE, as well as item "WALNUTWOOD - Walnut wood" takes part in the bill of material if rules "DB/WALNUTRAW" is TRUE;
3. Item "SCREW – Screw" present a formula connected to the characteristic Raw Wood ([WOODRW]). The field **quantities for** determine the quantity of that specific item in production.
   For setting up quantities for:
   o In case of numeric characteristic is enough to indicate the characteristic to use and the formula that have to be apply;
   o In case of tabular choice, choice code is an alphanumeric code not usable as calculated value, is possible to associate to each choice a numeric value in the base characteristic choice in the field **Numeric Index**.

Codice Scelta	Descrizione	Sequenza	Testo per Descrizione Articolo	Priorità (1=Min 99=Max)	Scelta Cus...	Esistono Traduzioni	Indice Numerico ↑	Esis... Carat. Dip...
→ CST ⋮	Custom	9999	Custom	0	☑	No	0	☐
CHERRY	Cherry wood raw	0	Cherry woo...	0	☐	No	4	☐
WALNUT	Walnut wood raw	0	Walnut woo...	0	☐	No	8	☐

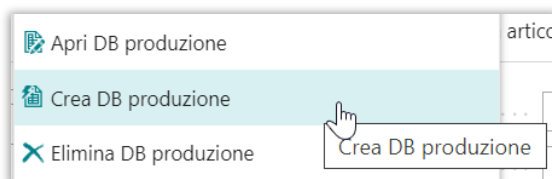*Picture 42 – Numeric Index for Bill of Material Formula*

3.8.1.1   HOW: create a configurable Bill of Material

For Creating a configurable bill of material it must be used a function that impose into the configuration profile as Configurable .

Profilo Configurazione	Configurabile
Nr. Classe Configur.	CHAIRS

Picture 43 – Configuration Bill of Material

In item card under section Configuration select **Action, Configuration, Create Production Bill of Material**.

Picture 44 – Bill of Material for Configurable Item

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Bill of material is created with the same item code and is automatically inserted into the item card.

NOTE: if bill of material is not configurable it won't be possible to insert configurable item neither insert other configuration rules.

3.8.1.2   HOW: assign configuration rule on bill of material

In section bill of material line select configurator, then rule **for action on line**.

Picture 45 – Action Rule on Line

Insert assign rule.

Picture 46 - Assign Rule for Line Action

If in bill of material line will be an action rule, the flag **Action Rule** will be valorised as True.

This rule can be helpful to a furniture company, that needs to diversify colour or type of fabric for a specific product.

In case of chairs you can have different value for **Sitting Color** (COL-SEDUTA in the example) and **Backrest Color** (COL-SCHIENALE in the example). The items the company is dealing with are Backrest and Sitting, and company for production will buy fabric for covering them.

Art. padre conf.bile	Caratteristiche	Art. figlio conf.bile	Caratteristiche	Art. figlio conf.to
SCHIENALE	COL-SCHIENALE	TESSUTO SCHIENALE	COL-SCHIENALE	**TESSUTO SCHIENALE/001**
SEDUTA	COL-SEDUTA	TESSUTO SEDUTA	COL-SEDUTA	**TESSUTO SEDUTA/001**

Is possible to create a generic item for Fabric, that will have the same characteristic of principal item, so creating rules that assign the same value to COL-SCHIENALE and COL-SEDUTA, so it will be generate a unique item for bill of material.

Art. padre conf.bile	Caratteristiche	Regola azione	Art. figlio conf.bile	Caratteristiche	Art. figlio conf.to
SCHIENALE	COL-SCHIENALE	→	TESSUTO	COL-TESSUTO	**TESSUTO/001**
SEDUTA	COL-SEDUTA	→	TESSUTO	COL-TESSUTO	**TESSUTO/001**

3.9   Configurable Routing

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This function let to:
- Create production routing with a list of different production phases that will change on the base of the different characteristic choice during item configuration;
- Determine variable production timing, based on the characteristic choice.
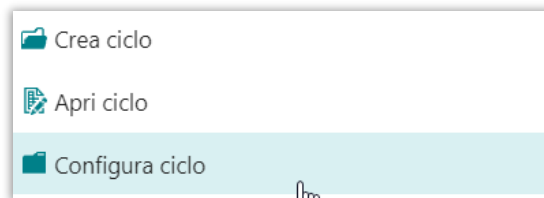
3.9.1.1   HOW: configurate a production routing

Routing configuration is connected with **BC standard task code**.

Picture 47 – Configuration Routing Line

After creating a production routing and insert task code, you have to use function configure routing, in configuration section (from routing or from item card).

Picture 48 – Configure Routing

In the opening page will be open the task previously assign in the routing line.

Picture 49 – Task for routing configuration

For configuring a phase select the referring line and then click on Manage Action.

As for bill of material line (see Configurable Bill of Material), also routing is define using rule. In routing line there is a field **Rules Type** that determine different parametrization.

Below the list of the rules:
- **Base →** is mandatory and is filled up if there is a task in routing line. Is not allow to insert of rule in the field Rule Test Present Action; it allow to modify routing timing;
- **Substitutive →** overwrite the application of base rule. It is connect with a route action for let the rule to be active.
- **Integrative →** on the base of verified condition it is useful to use additional time to base rule; you can use more than one integrative rule in the same routing;

powered by

- ▪ **Unable task** ➜ is used to unable a task (always) or in case a specific condition is true.

Picture 49 – Rules on Configurated Routing

For the example above, in case condition will result true, routing will report the following info:

IF TRUE	SETUP TIME	RUN TIME	WAITING TIME
Base	10	11	2
Sostitutiva	15	16	2 (vedi ATTENZIONE)
Base & integrativa	12,5	16,5	3
Sostitutiva & integrativa	17,5	21,5	3 (Vedi ATTENZIONE)
Disabilita task	ND	ND	ND

NOTE: value setup for substitution rules will be applied only if the fields is not empty. If you want to substitute a valorised field with a null value the substitute value have to be valorised as ZERO.

3.10   Configurated Item

Configuration of Item can follow two different way:
1. **Configuration Wizard**
2. **Advanced Configuration**

Another way for configuration is the Multiple configuration for characteristic combination (see   Multiple Configuration).

On **Configuration Setup** Page you can define the way in which you want to configure item into sales document. Select in Document Line Configuration Mode, Wizard or Advanced Configuration.
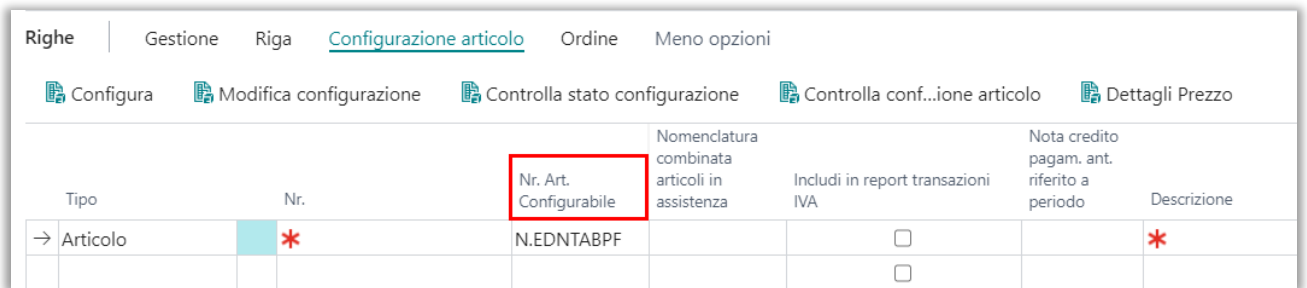
3.10.1   Configuration Wizard

Configuration **Wizard** propose a driven choice of characteristic value, grouped by topic. You can used Wizard from item card or from sales document line.
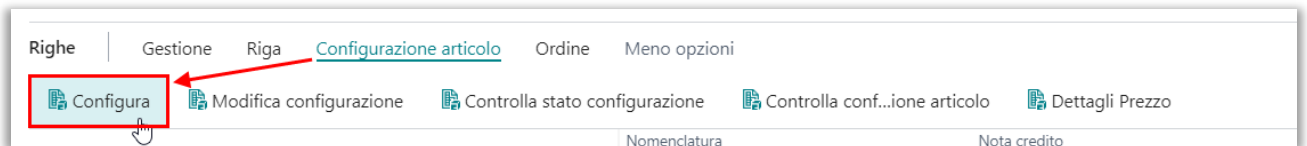
powered by

Picture50 – Configuration Wizard From Item Card

For using configuration Wizard from sales order you have to insert into sales line configurable item number, into the proper field as shown n the picture below.
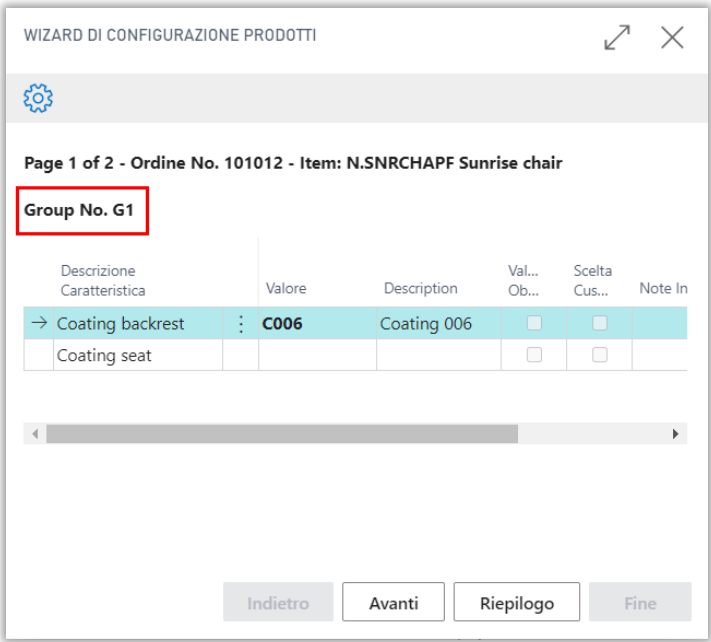

Picture 51 – Insert Configurable Item No.

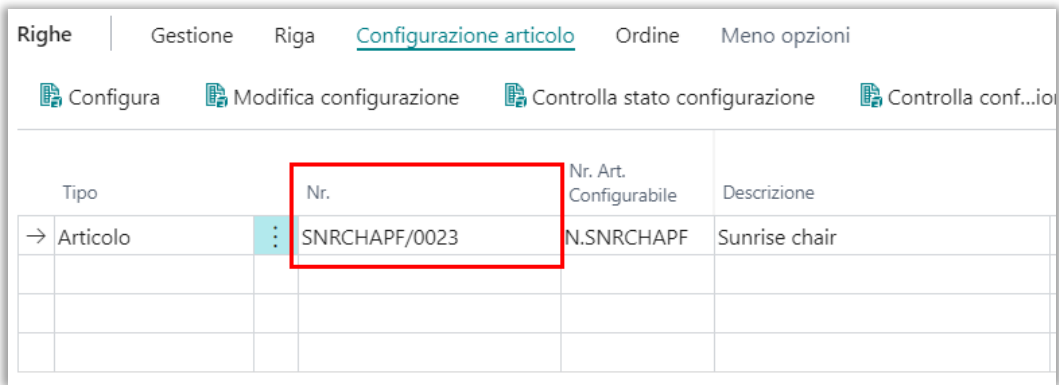In Item Configuration, select Configure Item to start with Wizard:

Picture 52 – Configuration Function

Picture Below show how wizard works, showing characteristic grouped by input characteristic group. (see Assign Input Charcteristic Group). Using NEXT and BACK button you can move into wizard page.

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Picture 53 – Wizard Page with Group

Once configuration is complete select finish. There will be configuration check, item configuration and the created item will be inserted into sales line.

Picture 54 – Insert configurated Item in Document Line

In case of error, they will sum up in a pop up at the end of configuration.

It is always possible to check item configuration for showing and checking configuration.

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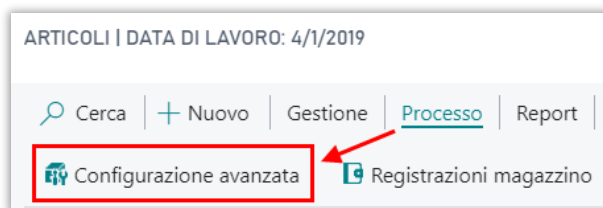*Picture 55 – Configuration Resume*

3.10.2   Advanced Configuration

Advanced configuration usually starts from item list or from configurable item card. It also possible to start advanced configuration from sales line.

A configurated item, in item card present the following values:
- **Configuration Profile**: Configurated;
- **Configuration Class**: present the class to which the item belong;
- **Configurable item No.**: resent the configurable item from where the start;
- **Configuration Pattern Entry No**: contains value that indicate specific configuration no and also represent the relationship among item table and configurator table;
- **Custom Item**: is ✔ if the item present custom value.

3.10.2.1   HOW: use Advanced Configuration

From configurable item you can activate configuration process, in particular Advance Configuration.
Advanced configuration does not deal with group division as Wizard does.

Picture 56 -Advanced Configuration

In advanced configuration are shown Base Characteristic that have to be compile with specific value.
If any Custom Choice, you can specify internal custom Note. This note will be posted also on item that will present that specific characteristic.

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Picture 57 – Characteristic in Advanced Configuration

Details in advanced configuration regards Bill of Material and unit cost calculation of configured item.

Other functions are:
- **Configuration Check** → verify the configuration value and present error/message; apply configuration rule, calculate multi-level Bill of Material, calculate cost, calculate item mask code;
- **Confirm and Exit** → it execute configuration Check and also are created the related master date (item, bill of material, routing).

Once the configuration Check is Execute the creation of a new item is requested (calculated code) or an existed item (existed item) is proposed:
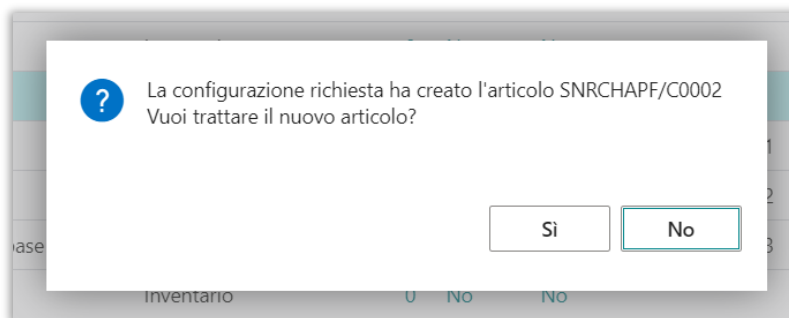

Picture 58 - Check Configuration

Other sections of advanced configuration are:
- **Product Structure** → it let you to check the structure without applying any rules that will be applied on Check;
- **Final Structure** → after configuration Check; in this section you can check structure error and their message. In case of errors the field Error Exist will setup as True, and using the action View Error Message is possible to check error details. The Action View Configuration Characteristic, let you to check characteristic of the configured item.

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Nr.		Tipo	Descrizione	Nr. livello	Esistono Errori	Nr. Distinta Base	Cod. UdM	Quantità per	Tempo di setup
→ GEN	⋮	Area di pro...	General	1				0	1
N.SNRCHASL01		Articolo	**Sunrise backrest**	1		N.SNRCHASL01	PZ	1	0
GEN		Area di pro...	General	2				0	0
N.FABRIC		Articolo	Fabric	2			MQ	10	0
N.SNRCHASL02		Articolo	**Sunrise seat**	1		N.SNRCHASL02	PZ	1	0
GEN		Area di pro...	General	2				0	1
N.FABRIC		Articolo	Fabric	2			MQ	12	0

- **Local Variable** → is populated in case there are characteristic filled up from database value (see data type in Base Characteristic);
- **Configuration Message** → Contains message taken from configuration.

After Confirmed configuration is possible to see the configured item:

Picture 59 – View Item Request

Configurated Item will present all the info of configurable item, included routing and bill of material.

Picture 60 – Item Configuration Detail

With Item creation you have a new bill of material of the item but also of all its components.

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Generale

Nr. · · · · · · · · · · · · · · · ·	SNRCHAPF/C0002 · · ·	Nome ricerca · · · · · · · · ·	SUNRISE CHAIR
Descrizione · · · · · · · · ·	Sunrise chair	Nr. versioni · · · · · · · · · · ·	
Cod. unità di misura · · · · ·	PZ	Versione attiva · · · · · · · · ·	
Stato · · · · · · · · · · · · · · ·	Certificata	Data ultima modifica · · · · ·	4/23/2020

Righe | Gestione | Visualizza opzioni

	Tipo		Nr.	Descrizione	Quant... per	Cod. unità di mis...	% scarto	Cod. collegamento tra ciclo e distinta base	Profilo Configur.	Regola Test Presenza Rig
→	Articolo	⋮	SNRCHASL01/0010	Sunrise backrest	1	PZ	0		Config.to	
	Articolo		SNRCHASL02/C0002	Sunrise seat	1	PZ	0	GEN	Config.to	
	Articolo		SNRCHASL03/0004	Sunrise varnish...	1	PZ	0	GEN	Config.to	

Picture 61 – Bill of Material Configurated Item

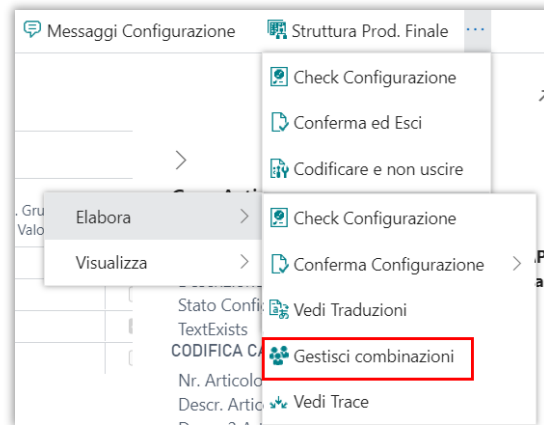## MODIFICA - DISPONIBILITÀ ARTICOLO PER LIVELLO DB

OPZIONE

Filtro articolo	SNRCHAPF/C0002 · · ·	Data uscita	4/1/2019
Filtro ubicazione	· · ·	Calcolato	⬤
Filtro variante	· · ·	Mostra disponibilità totale	⬤

	Nr.		Descrizione	Collo di bott...	Qtà per padre	Cod. unità di misura	Sistema di rifornimento
→	**SNRCHAPF/C0002**	⋮	Sunrise chair	☐	1	PZ	Ordine di produzione
	SNRCHASL01/0010		Sunrise backrest	☑	1	PZ	Ordine di produzione
	FABRIC/0009		Fabric - Coating 006	☑	10	MQ	Acquisto
	SNRCHASL02/C0002		Sunrise seat	☐	1	PZ	Ordine di produzione
	FABRIC/C0002		Fabric	☐	12	MQ	Acquisto
	SNRCHASL03/0004		Sunrise varnished base	☐	1	PZ	Ordine di produzione
	SNRCHASL04/0002		Sunrise raw base	☐	1	PZ	Acquisto

Picture 62 – Bill of Material Structure Configurated Item

3.10.2.2   HOW: use multiple configuration

Multiple Configuration let to codify all the configurated item using automatic combination of all characteristic Value. Function is activated from Advanced Configuration (Action > Manage combination), after setting up fixed value requested for calculating different combination;

powered by

Picture 63 – Manage Combination

In combination page, you can select the ones from which you desire to create configured item using Set Codification Request or Reset Configuration Request.

In the field existed item are shown item already existed for specific combination.

Once lines are ready is possible to create configured item.

Picture 64 – Select Item for new creation

NOTE: this function is enabled just if in the configuration class flag admit item created by characteristic combination is active and if item doesn't have associated any bill of material.

3.11 Configuration Details

The function Configuration Detail is under the configuration menu of the item card or in item configuration detail factbox in item card.

powered by

Picture 65 – Configuration Details

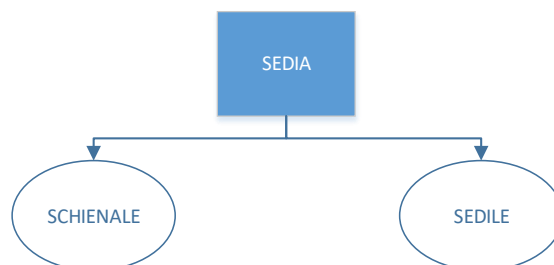This function presents three different aim:

1. Summarize configuration data related to a specific item (configurable or configured);
2. For **configurable** item, is useful for setting up rules and option on characteristic and differentiate them from the ones taken from configuration class;
3. On **configured** item contains update request for bill of material and routing.

For the first function, so summarize configuration data, it is important to know that here are contained all characteristics filled up for a configurated item, or the preconfigure ones. It is also indicated configuration profile, configuration class and configurable item reference.
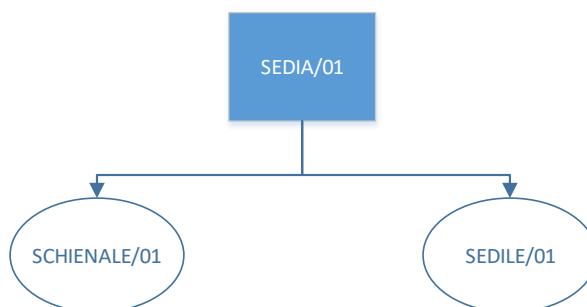
For the second function, hence for specific option on characteristic for configurable item, is important to know that in this section is possible to activate the not used characteristic option (see Create configurable item).
When field not used is active✔, it let you to exclude one characteristic from configuration process of configurated item. That means you can exclude a characteristic from an item or include it again in case was previously excluded.

The third function, is necessary in case you want to update a bill of material or a routing of configurated item from which routing and bill of material have been already created.
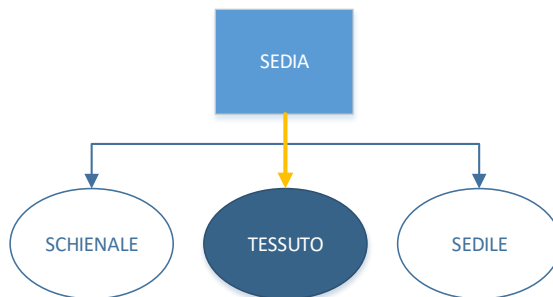For example, a chair have a bill of material composed by sitting and backward.

From chair are born different item: chair, sitting, backward, with bill of material and routing.

Then, in configurable bill of material of chair item, will be added the item fabric.

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When Bill of material is update, for configurable item connected to the bill of material, the field Request Update Bill of Material structure will be flag as true (same in case of routing).

Picture 66 – Configuration Details with update request.

You can force this flag using the following action:
- **Setup Update Routing** → activate the flag for routing activation;
- **Undo Update Routing** → unable the routing update;
- **Setup Update Bill of Material** → activate the flag for bill of material update;
- **Undo Update Bill of Materia** → unable the bill of material update;

These functionalities are extremely useful in case you want to recalculate bill of material or routing when this not happen in an automatic way, for example in case you modify the configuration rule in bill of material, for which the certification will not update the update request.

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Azioni   Naviga

● Imposta aggiornamento DB   ● Imposta aggiornamento ciclo   ○ Annulla aggiornamento DB   ○ Annulla aggiornamento ciclo
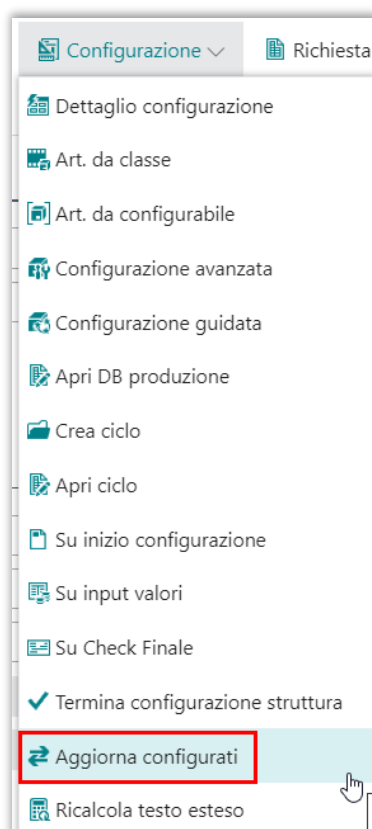
Nr. Classe Configur. · · · · · · · · · ·	CHAIRS	Esistono Regole Locali · · · · · · · · ⬤
Nr. Art. Configurabile · · · · · · · ·	N.SNRPF01	Esistono Regole Su Inizio · · · · · · ⬤
Rif. prezzo articolo fisso · · · · · · · ⬤		Esistono Regole Su Input · · · · · · · ⬤
Richiesto Update Struttura DB · · ⬤		Esistono Regole Su Check · · · · · ⬤
Data richiesta di riferimento · · ·		Esistono Pattern Prezzi Vend. · · · ⬤
Richiesto Update Ciclo Lavor... · ⬤		

Picture 67 – Function for enable/disable update

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3.11.1.1   HOW: recalculate routing and bill of material already existed

Bill of material or routing can be update in different way:

1. Automatically when in configuration process of an item (out of sales document), is calculated an already existed item. ITs BOM and Routing are recalculate and update;

2. Manually, for updating a configuarated item using the function **Update Configurated** in the configuration section;
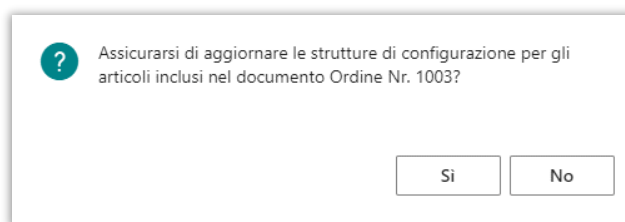

Picture 68 – Function Update Configuration

1. On sales order, on the base of configuration setup on the field **Auto Refresh item on Sales** (see Configuration Setup) or in item card using function **Action>Update Item Configuration.**
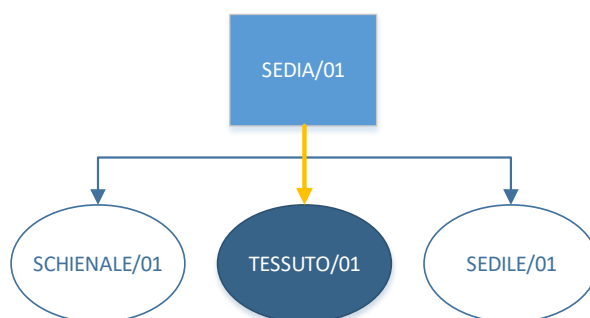

Picture 69 – Function Update Configuration Item

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Picture 70 – Update Request Message

When bill of material or routing are update, update flag will be unable.

3.12   Option Sales Price

Option sales price are sequence of economics value of each characteristic, that are read during sales procedure and at the end determine the final price, on the base of characteristic used.

Many price elements can be define as fixed price or as percentage and are usable in sequence or as alternative on the base of the different rules applied. Price can be define for validity date and price type (all customer, customer price group.)

Codice Caratteristica	Valore Scelta	Regola Selezione	Cod. Modello	Applica a Tipo Prezzi Vendita ↓	Codice vendita	Tipo Sovrapprezzo	Valore Sovrapprezzo
WOODVR		R/WALNUTVRNSH		Cliente	10000	Applica Sovrapprezzo	90.00
WOODVR	W002		EDEN	Cliente	10000	Applica Sovrapprezzo	88.00
WOODVR	W002		EDEN	Tutti Prezzi di Vendita		Applica Sovrapprezzo	77.00
WOODVR	C002		EDEN	Tutti Prezzi di Vendita		Applica Sovrapprezzo	1,000.00

Picture 71 – Option Sales Price

Option sales price is similar to standard BC sales price, with the difference the price is applied to each single characteristic. So price is build up on the base of characteristic choice.

For option price you can setup up selection rules made as condition only without any action (see Configuration Rule)..

Nell'esempio sopra riportato:
- La riga 1 indica che, per il cliente 10000, se la condizione della regola "R/WALNUTVRNSH" è verificata in corrispondenza di qualsiasi valore della caratteristica "WOODVR", allora la stessa caratteristica avrà un prezzo pari a 90;
- La riga 2 indica che, per il cliente 10000, in corrispondenza di un valore EDEN della caratteristica modello, se la caratteristica "WOODRV" assume il valore "W002", allora la stessa caratteristica avrà un prezzo pari a 88;
- La riga 3 indica che, per tutti i clienti, se la caratteristica "WOODRV" assume il valore "W002", allora la stessa caratteristica avrà un prezzo pari a 77;
- La riga 3 indica che, per tutti i clienti, se la caratteristica "WOODRV" assume il valore "C002", allora la stessa caratteristica avrà un prezzo pari a 1000;

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NOTE: if you want to manage price for customer ALL option have to be manage for customer. Is not possible used mix characteristic one for customer and one for customer group.

4   APP SUBSCRIPTION

Every App feature requires a valid subscription.
At first installation, a trial plan is automatically activated by the system.
After this period, you can subscribe for a product level (feature) using the Alterna Apps page or directly from the system notifications by clicking on the link which opens the product activation wizard.

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