

Infor SyteLine Integration Guide for Infor CPQ Configurator

SyteLine 9.00.30 and later Product Configurator 8.1 or Enterprise Configurator 21.x

Copyright © 2021 Infor

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

Publication Information

Release: Infor CPQ 8.1

Publication Date: November 5, 2021

Document code: cpq_8.1_sl_cpq_ng_onprem_hybrid_90030andlater__en-us

Contents

About this guide	4
Contacting Infor	4
Chapter 1: Requirements	5
Chapter 2: Overview	6
Chapter 3: Setting up the integration	8
URLs for hybrid configurations	8
Chapter 4: Rules development approach	9
Header level rules for global defaults support	9
Header level document generation	9
Line level rules	10
Post Configuration rules processing	10
Mapping Configurator data to SyteLine	11
Support for schema mapping	14
Rule structure, component rule, and sub-job considerations	14
Creating multiple lines upon return from configuration	16
Planning for manufacturing rules	17
Chapter 5: Frequently asked questions	19

About this guide

This guide provides implementation information for the integration between on-premises Infor SyteLine versions 9.00.30 and later and either Infor CPQ Product Configurator version 8.1 (on-premises) or Infor CPQ Enterprise Configurator version 21.x (cloud) for hybrid environments.

Intended audience

This guide is for system administrators who implement the integration between SyteLine and Configurator.

Related documents

You can find these documents in the product documentation section of the Infor Support Portal.

- Infor SyteLine Installation Guide
- Infor SyteLine Configuration and Document Automation User Guide (10.x only)
- Infor Configure Price Quote UMS and Configurator Installation Guide (CPQ 8.1)
- Infor Configure Price Quote Queue Services Installation and Setup Guide (CPQ 8.1)

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

The latest documentation is available from <u>docs.infor.com</u> or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Requirements

Ensure that you have installed and configured the necessary hardware and software for the components specified for your environment.

On-premises SyteLine with on-premises CPQ Product Configurator

- SyteLine 9.00.30 or later
- CPQ Product Configurator 8.1

On-premises SyteLine with cloud Configurator

- SyteLine 9.00.30 or later
- Infor CPQ Enterprise Configurator 21.x
 See <u>URLs for hybrid configurations</u> on page 8.

Chapter 2: Overview

When SyteLine is integrated with Configurator, you can perform these tasks:

- Create new configurations or edit and reconfigure existing configurations. You can launch and use the Configurator from these areas in SyteLine:
 - Estimates
 - Configure at estimate header level, setting global default option values.
 - Configure estimate line items with or without the inheritance of default values from the header level configuration.
 - Customer Orders
 - Configure at order header level, setting global default option values.
 - Configure order line items with or without the inheritance of default values from the header level configuration.
 - Configure blanket lines with or without the inheritance of default values from the header level configuration.
 - Estimate jobs
 - Jobs
- Add new lines to the estimate or order at the conclusion of the configuration using the Create New Line functionality. Estimate job and jobs support a single line from SyteLine.
- Copy configured lines:
 - At the line level, the corresponding configuration options and outputs are copied.
 - At the order or estimate level, all configuration outputs at the header configuration level and for each of the configured lines are copied.
 - At the job and estimate job level, the configuration outputs at the header configuration level and for each of the configured lines are copied.
- Process a configuration, or run the manufacturing rules to create bills of materials (BOMs) and/or routings, based on the rules definitions. This is followed by the creation of jobs in SyteLine.
- Delete configured lines from the areas in SyteLine that supports this feature:
 - Delete configuration options for a single line item.
 - Delete configuration options for all configured items associated with a header.
- Support SyteLine sub-jobs for configured line items.
- Place a configuration hold on these forms in SyteLine:
 - Customer Order Lines
 - Customer Orders Quick Entry
 - Job Orders
 - Estimate Job Orders
 - Estimate Lines

- Estimates Quick Entry
- Customer Blanket Lines
- Generate documents from the Header level using CPQ Document Automation from these SyteLine forms:
 - Customer Orders
 - Customer Orders Quick Entry
 - Job Orders
 - Estimate Job Orders
 - Estimates
 - Estimates Quick Entry

Note: Document automation is not supported in hybrid environments (on-premises SyteLine with cloud Configurator).

- Attach documents to a configured job or estimate job at these levels:
 - Job Header
 - Material
 - Operation

Note: Attaching documents to jobs is made available as part of the SyteLine 9.00.10 Service Pack.

- Post configuration processing
 - Support for post configuration processing of rulesets through Infor CPQ Queue Services. Post
 configuration processing is used to generate SyteLine manufacturing jobs and sub-jobs or 2D
 and 3D content after the interactive configuration is complete. Post configuration functionality
 is enabled on the these forms in SyteLine:
 - Customer Order Lines
 - Customer Orders Quick Entry
 - Job Orders
 - Estimate Job Orders
 - Estimate Lines
 - Estimates Quick Entry
 - Customer Blanket Lines

Chapter 3: Setting up the integration

- 1 For on-premises Configurator, install CPQ Product Configurator as described in the *Infor Configure Price Quote UMS and Configurator Installation Guide*.
- 2 In SyteLine, specify the URL to access CPQ. Save the URL and then specify the name of the Configurator Application ID, as defined in the CPQ Enterprise Manager and the Global name spaces.

Note: If you are using on-premises SyteLine with the cloud Configurator, see <u>URLs for hybrid configurations</u> on page 8.

- To set up and use the Configurator user interface within SyteLine, refer to the SyteLine online help, under Configuration in the help table of contents.
- **4** Optionally, set up Queue Services if this is going to be used in your environment. Refer to the *Infor Configure Price Quote Queue Services Installation and Setup Guide* for more information.

URLs for hybrid configurations

For hybrid configurations with SyteLine 9.00.30 and later that are connected to a cloud Configurator, these URLs must be used:

Tenant Location: United States

https://configurator.inforcloudsuite.com/ConfiguratorService/v3/ProductConfigurator.svc

Tenant Location: Europe

https://configurator.eu1.inforcloudsuite.com/ConfiguratorService/v3/ProductConfigurator.svc

Tenant Location: Asia Pacific

https://configurator.se2.inforcloudsuite.com/ConfiguratorService/v3/ProductConfigurator.svc

Chapter 4: Rules development approach

For the Configurator to work with SyteLine, you must create rules based on the guidelines presented in this section.

Header level rules for global defaults support

The Global Default values functionality enables SyteLine users to configure a ruleset at the Header level and have all subsequent lines inherit default values added to the given order or estimate.

For this functionality to work, these requirements must be met:

 In the CPQ Product Configurator, a Global Namespace contains all rulesets that can be used to set global defaults. Multiple rulesets are supported to handle cases where different global defaults can be applied, depending on the product family being added to the order. This new Global Namespace is registered on the **Product Configuration** tab of the **Inventory Parameters** form in SyteLine.

Note: Only one Global ruleset can be associated to a given order or estimate, but you can select from multiple rulesets.

Adding lines from the Header Level Document Generation is supported, subject to the approach
used for line items. This feature is made available as part of the SyteLine 9.00.10 service pack.
See <u>Header level document generation</u> on page 9.

Note: This feature is not supported by cloud Configurator.

Header level document generation

Note: This feature is made available as part of the SyteLine 9.00.10 service pack. It is not supported by cloud Configurator.

The **Generate Document** button generates and attaches configurable documents in SyteLine using Infor Document Automation. Example forms include:

- Customer Orders
- Customer Orders Quick Entry
- Job Orders

- Estimate Job Orders
- Estimates
- Estimates Quick Entry

Click **Generate Document** to call the CPQ Product Configurator using the settings specified on the SyteLine **Inventory Parameters** form. If the Default Rule Set parameter is populated on this form, the ruleset is launched automatically. If the Default Rule Set parameter is blank, you must specify a ruleset contained in the Namespace parameter. A SyteLineDocument Integration rule must be used to attach the document to SyteLine.

See Mapping Configurator data to SyteLine on page 11.

Setup parameters for Document Automation are located under the Document Automation section on the **Inventory Parameters** form. The Document Automation section contains these settings:

- Application ID: CPQ application that contains the Document Automation rulesets.
- Name Space: CPQ namespace where the Document Automation rulesets are stored.
- Default Rule Set: CPQ ruleset that is launched when Generate Document is clicked.

Refer to the document automation installation guide for your software version. See "Related documents" in <u>About this guide</u> on page 4.

Line level rules

Writing rules in a Configurator for SyteLine integrated environment does not impose any special restrictions; however, these special considerations exist when the Configurator is used with SyteLine:

- What data passes to SyteLine at the conclusion of the configuration session.
- · How multiple lines are created from within a single configuration session.
- How and when manufacturing rules run.
- · How output is delivered to SyteLine.

See Mapping Configurator data to SyteLine on page 11.

See Support for schema mapping on page 14.

See Rule structure, component rule, and sub-job considerations on page 14.

See Creating multiple lines upon return from configuration on page 16.

See Planning for manufacturing rules on page 17.

Post Configuration rules processing

Note: Post Configuration functionality is currently not supported when running SyteLine with cloud Configurator.

The model must be updated with the QueueType and QueuePostConfiguration pre-defined component attributes as specified in the *Infor Configure Price Quote Queue Services Installation and Setup Guide*.

If the **Post Configuration** read-only check box is selected, it means that the configuration must go through the post configuration process. In this state, if you click **Finish** in the Configurator UI, you will see that no job is created until the post configuration process is finished with a **Complete** status.

If the check box is cleared, it means that the configuration does not have to go through the post configuration process. In this state if you click **Finish** in the Configurator UI, you will see the job was created, and the **Configurator** button should have the **Configure** - **Complete** label on it.

QueuePostConfiguration, QueueType predefined component attributes

Set the value of the QueuePostConfiguration predefined component attribute to **True** to process the post configuration rules after the interactive configuration has been completed. Set the value of the QueueType predefined component attribute to a valid Queue Services Configuration Type name.

Note: This process is not supported by the cloud Configurator.

Mapping Configurator data to SyteLine

The SyteLine sub-system processes outputs that are delivered into the CFG tables, appropriately taking into consideration if it is a new configuration or a re-configuration. Validation and existence checks are performed by SyteLine.

Any variable value or other constructs in the CPQ Product Configurator will not map into the SyteLine data structures, unless one or more specific actions are taken by the rules developer. To map Configurator data to SyteLine CFG tables, the rules developer must use one of these methods:

Component rule

Write a Component rule to map a BOM component into SyteLine as a manufactured component. Each Component rule results in a record in the CFG_MAIN SyteLine table. The first component encountered for a configuration session is marked as a Configuration and subsequent component rules are mapped as sub-jobs in the SyteLine table structure. All attributes that are defined at the Component rule level are mapped as part of the configuration session commitment process.

The Component rule enables you to define tree hierarchy using the **Parent Component** field. This hierarchy directly maps to the jobs/subjobs hierarchy in SyteLine. The Configurator enables the rules to define a material as a parent of a component, and only component relationships map to SyteLine.

Material rule

Write a Material rule to map a material as a standard item into SyteLine.

Operation rule

Write an Operation rule to map an operation into the corresponding operation component in the SyteLine table structure. All attributes defined at the Operation rule level are mapped as part of the configuration session commitment process.

• Work-Instruction rule

Write a Work-Instruction rule to define steps detailing the operations. These are mapped as notes related to the specific operation that is the parent of the work-instruction.

Detail rule

A Detail rule that contains an entry whose category is either pricing or detail will populate the **List Configuration Values** form so the values can be used for reporting purposes. These values will be stored in the app.BDCDetails and the app.cfg attr tables.

MFG Detail rule

Write a MFG Detail rule to attach a document to a Job Header, Material or Operation record in a configured job. The file path that is passed back must be a UNC path, such as \\ServerName\\CPQ\ConfiguratorContent\Document.pdf.

Note: This path does not apply to hybrid environments that use the cloud Configurator. See <u>Passing</u> documents to SyteLine in a hybrid environment on page 12.

Use the Attach To attribute on this rule to control where the document will be attached, using one of these values:

- Job: Document attached to the job header
- Material: Document attached to a material record
- Operation: Document attached to an operational record

Note: This feature is made available as part of the SyteLine 9.00.10 Service Pack.

SyteLineDocument Integration rule

Write a SyteLineDocument Integration rule to attach documents at the order, estimate, job, or estimate job header level. The file path that is passed back must be a UNC path, such as \\ServerName\CPQ\ConfiguratorContent\Document.pdf.

Note: This path does not apply to hybrid environments that use the cloud Configurator. See <u>Passing documents to SyteLine in a hybrid environment</u> on page 12.

SyteLine_Hold Predefined Component attribute

Set the value of the SyteLine_Hold Predefined Component attribute to True, to place a configuration hold on the job that was generated because of the configuration. Setting the value of this attribute to False during reconfiguration releases the hold on the job. The hold is also released in SyteLine from the Actions > Remove Config Hold menu option. Jobs with a configuration hold applied cannot be released until the hold has been removed.

Passing documents to SyteLine in a hybrid environment

The way our integration accesses and passes documents to SyteLine in a hybrid environment is different than in an all on-premises environment. This section explains how static and dynamically generated content is handled with the cloud Configurator.

Static content

For content that has been uploaded using the Content Manager in CPQ WorkBench (Enterprise Configurator Settings > Cloud > Content Manager), the file may be accessed using the sys.LinkRoot system variable. For example, say the MF-50900.jpg file has been uploaded to the BC/Frames folder in the Images directory. For the integration, the file can be accessed using this format:

```
=sys.LinkRoot + "Images/BC/Frames/" + "MF-50900.jpg"
```

Example URLs:

Tenant Location: United States

https://configurator.inforcloudsuite.com/Content/TenantName/Files/Images/BC/Frames/MF-50900.jpg

Tenant Location: Europe

https://configurator.eu1.inforcloudsuite.com/Content/TenantName/Files/Images/BC/Frames/MF-50900.jpg

Tenant Location: Asia Pacific

https://configurator.se2.inforcloudsuite.com/Content/TenantName/Files/Images/BC/Frames/MF-50900.jpg

Dynamically generated images

When you launch the Configurator from SyteLine, the Configuration DetailId is launched as a pending configuration and contains a "-P" suffix. When the configuration is completed, it is copied to a final configuration that no longer contains the "-P" suffix, and is linked to the order line. For the integration, the output link location for the configuration can be accessed using the sys.OutputLink system variable, which can be appended with the file name.

This is an example for generating the final URL link that will remove the "-P" suffix for a dynamically generated image that can be passed back to SyteLine:

```
Values passed from CSI:
Header ID Value: Test-1-DALS
Detail ID Value: 4-P

Variable Name: DetailIDTemp
Variable Value: = Substitute(sys.DetailID,"-P","")

Variable Name: CSIOutPutLink
Variable Value: =Substitute(Sys.OutPutLink,Sys.DetailID,DetailIdTemp)

Variable Name: CSIImageLink
Variable Value: =Concat(CSIOutPutLink + ImageName)
```

Example URLs:

Tenant Location: United States

https://configurator.inforcloudsuite.com/Content/TenantName/Output/Test-1-DALS/4/ImageName.jpg

Tenant Location: Europe

https://configurator.eu1.inforcloudsuite.com/Content/TenantName/Output/Test-1-DALS/4/ImageName.jpg

Tenant Location: Asia Pacific

https://configurator.se2.inforcloudsuite.com/Content/TenantName/Output/Test-1-DALS/4/ImageName.jpg

Support for schema mapping

To support schema mapping functionality, the integration registers a set of extensions to the model. These extensions modify the Manufacturing rule templates to include most of the standard valid schema mapping variables supported in SyteLine. A list of available fields listed in the table are found in the CfgSchemaAttributeFiles view in the Application database.

- Component rule
 Includes the attributes for the job table.
- Material rule
 Includes the attributes for the jobmatl and job_ref tables.
- Operation rule
 Includes the attributes for the jobroute and jrt_sch tables.

CPQ Product Configurator enables you to add notes to these tables:

Table Name	Attribute Name
Customer Order	Co.text
Customer Order Item	Coitem.text
Customer Order Blanket Item	Co_bin.text
Job	Job.text
Job Route	Jobroute.text
Job Material	Jobmatl.text

Note: The attributes for the Customer Order (co), Customer Order Item (coitem), and Customer Order Blanket item (co_bln) tables are not pre-populated in the manufacturing templates. The rules developer adds them to the appropriate manufacturing template using Infor CPQ Design Studio. These attributes must be mapped to the Mfg Operation or Material rules for optimal execution.

Rule structure, component rule, and sub-job considerations

The CPQ Product Configurator supports the creation of a multi-level structure through the Configured Component rule.

Product structures in the Configurator for manufacturing are created through the definition of the Component rules. A level in the configuration defined by the Configured Component may reference multiple Component rules.

For the Job structure, a job is created using the information specified in the first MFG Component rule encountered in the rule execution hierarchy. The part number specified in the top level MFG Component rule is the part number of the ruleset. Subsequent MFG Component rules and Create Component rules result in the creation of sub-jobs, one for every Component rule encountered. The part number for the sub-jobs is the number specified in the Component rules. Sub-jobs for non-configured items are created for every Material rule whose part number exists as an item in SyteLine, as long as it is a non-stocked, manufactured item.

Note: A Configured Component rule in the CPQ ruleset that does not explicitly use a Component rule to generate a manufacturing component requirement is not mapped to SyteLine.

Note: When a configuration is waiting to be processed in Post Configuration mode, the job and sub-job structure will be generated after the Post Configuration ruleset has successfully completed.

Print code considerations

SyteLine does not support customization to include other print codes. The **Print Code** field in SyteLine is one character.

This logic is used in the mapping of each rule type from the CPQ Product Configurator to SyteLine:

- Rules supported for mapping to SyteLine that are always passed to SyteLine:
 - Component rule
 - Material rule
 - Operation rule
 - Work-Instruction rule
 - Order Detail rule
 - Price Detail rule
- Print codes, if specified as I or/and E, pass to SyteLine as-is.
- If the print code is not specified, it passes as the SyteLine schema default.
- If it is other than I or E, then the print code passes as the SyteLine default. The exception to this rule is for the Price Detail and Order Detail rules. For these two rule types, if the print code is a value other than I or E and is not a null, then these rule outputs are not mapped to SyteLine.
- The purpose of the print code is to control which selected components and/or options are printed on these external SyteLine reports:
 - Estimate Response form
 - Estimate Job Routing report
 - Job Paperwork
 - Order Invoicing/Credit Memo
 - Order Verification report

SyteLine intelligent part number considerations

The CPQ Product Configurator Configuration Code capability produces a string identifier at the conclusion of a configuration session. This Configuration Code can be used to generate intelligent part numbers (IPNs) for a given configured line. In order for the Configuration Code to be returned to SyteLine, it

must be mapped to the ConfigurationCode attribute on the parent level BOM Component rule. The ConfigurationCode attribute may also be mapped on child level BOM Component rules (sub-jobs) in order to generate intelligent part numbers at multiple levels of the configuration.

Note: When a configuration is waiting to be processed in Post Configuration mode, the IPN will be generated after the Post Configuration ruleset has completed successfully.

To map the ConfigurationCode attribute:

SmartIPN

The rules developer must ensure that the ConfigurationCode attribute starts with the literal SMART.

```
Example: ConfigurationCode = "SMART" +"<Configuration Code>"
```

Sequential

The rules developer must ensure that the ConfigurationCode attribute starts with the literal SEQNT and then include the base part number.

```
Example: ConfigurationCode= "SEQNT" + "<Base Part Number>"
```

CEP

The rules developer must ensure that the ConfigurationCode attribute starts with a literal CEPKY and then include the base part number.

```
Example: CEP = "CEPKY" + "<Base Part Number>"
```

Price considerations

At the conclusion of a configuration session, the final price produced by the Configurator Commit rule passes to the SyteLine data structure. No SyteLine logic is used to calculate prices based on price detail outputs or other Configurator variables. The rules developer can write Price Detail rules to provide an optional price breakdown structure at any level in the configuration structure.

If a Commit rule in the Configurator is not used to finalize the price, then no price is returned to SyteLine. In these cases, the default logic selects a price for the configured item.

Creating multiple lines upon return from configuration

SyteLine supports the ability for a configuration to add multiple lines to the order when the configuration session is complete. This functionality is designed to facilitate the addition of kit parts, accessories, or other components that are typically shown separately on pick-lists, invoices, or other documents.

To trigger a line item add, the rules developer creates a Material rule with the CreateNewLine attribute set to **True** for each line that is added to the order. When the session concludes, the mapping procedure passes the Material rule to SyteLine. SyteLine logic interprets the CreateNewLine attribute for each material that is passed in and creates a new line for each material that has this attribute set to **True**. This logic is usually done for non-configured items.

If the part number in the Material rule refers to a configurable item, no configuration outputs are extracted, transferred, or created for the newly created line. The user configures the item at the new line level

after the line items are added. If the original parent line is re-configured, the existing SyteLine logic determines how the new child lines are handled. CPQ does not maintain or track the configuration or re-configuration status regarding the multiple line generation capability within SyteLine. From a Configurator standpoint, this function triggers the addition of additional lines, but no links or references between the parent line and the added lines are maintained.

Note:

- This behavior can be triggered from either rules associated to a part/item, or from Header Level rules that are triggered at the header level.
- A material that has **Create New Line** set to **True**, creates a new line, but that material will not display in the job BOM.
- When a configuration is waiting to be processed in Post Configuration mode, the new line item will be generated after the Post Configuration ruleset has completed successfully.

Planning for manufacturing rules

The CPQ Product Configurator performs manufacturing rules during interactive configuration:

When rules are performed while sales and pricing rules run.

While in background batch mode:

 After sales and pricing rules run by making a second web-service call to the Configurator at the conclusion of the interactive configuration to generate the manufacturing rules.

Manufacturing rules should be written so that they perform in batch to avoid the overhead of generating additional data and the execution of additional rules when the user interactively creates estimates, or creates orders. This technique may improve the performance of the interactive sessions and improve the overall user experience. Sometimes organizations that do cost plus pricing or in instances where manufacturing rules are simple, it might be more advisable to run these during interactive configuration.

At the completion of an interactive configuration session, after clicking **Finish**, you can select to run jobs or not. The control to create jobs is enabled through the **Auto Job Generation** option on the **Configuration** tab of the SyteLine **Items** form.

If you do not run jobs, these tasks are completed:

- 1 CPQ Product Configurator:
 - Saves configuration options.
 - Returns configuration results to the SyteLine user interface for update.
- 2 SyteLine:
 - Calls Configurator to copy from Workspace to Order tables.
 - Calls the Configurator Host Services API to map Configurator outputs from Order tables to the SyteLine CFG tables.
 - Updates the user interface with Configuration results.
 - Processes information in the CFG tables.

If you select to run jobs, these tasks are completed:

1 CPQ Product Configurator:

- Saves configuration options.
- Returns configuration results to the SyteLine user interface for update.

2 SyteLine:

- a If Preference * is enabled, then the CPQ web service is called to run manufacturing rules
 - 1 Sets initialization parameter to process manufacturing rules.
 - 2 Invokes background configuration.
- **b** Calls the Configurator Host Services API to map Configurator outputs from Order tables to the SyteLine CFG tables.
- **c** Updates the user interface with configuration results.
- d Processes information in CFG tables.
- e Runs the SyteLine jobs generation routines.

Note: From the CPQ Product Configurator standpoint, delivering the Configurator outputs to the CFG tables in SyteLine will always do these things:

- MAP, PUT operation for the top-level record on the CFG_Main table. If the record already
 exists, it is updated; otherwise a new CFG_Main record is inserted.
- DROP, MAP, PUT operation for all dependent records on the CFG_Main table (sub-jobs).
- DROP, MAP, PUT operation for CFG_ref where type is job.
- DROP, MAP, PUT operation for CFG_comp and CFG_attr tables.

IF INTERACTIVE Then

Mfg Rules will be run in line (for example, Cost Plus or simple Rules)

Run Web service at appropriate time

END IF

ELSE IF BATCH THEN

Chapter 5: Frequently asked questions

- Can the rules dynamically control whether the Configuration Code maps to SyteLine or not? Yes. The Configuration code only maps to SyteLine as an IPN type if the first five characters are SMART, SEQNT, or CEPKY. The rules developer can build the configuration code with a variable that contains the first five characters and assign the correct value to control this from the rules.
- How do we tell SyteLine to use dashes or not when creating an IPN of type SEQNT? Inclusion of dashes in the IPN of types SEQNT and CEPKY is controlled by SyteLine. CPQ CPQ Product Configurator allows the rules developer to build the SMART part numbers by defining the configuration code. The string after the "SMART" prefix is used by SyteLine to create the new item in the item master.
- When a Material rule has Create New Line set to True, is the price specified in the Material rule used as the default price for the "New Line"? What happens if there is no price defined? If the Material rule has Create New Line set to True, the price defined in the rule will be used as the default price for the new line. If no price was defined, then SyteLine will use the default logic to calculate the price for the item.
- How can we create notes associated to the material? By typing the value jobmatl.text as an attribute name on a Material rule. CPQ CPQ Product Configurator enables you to add notes to jobmatl tables.
- Does Configurator support multi-site functionality? Multi-site functionality is standard SyteLine functionality and not a CPQ CPQ Product Configurator feature. However, there may be SyteLine Single fixes that are related to using the Configurator in a multi-site environment. Contact Infor Support for additional information.
- Can I use special characters in entities? Special characters (\(\Lambda:^?"<>|) are supported in the CPQ Product Configurator entities. This support generally follows the Microsoft model for special characters. Note that while the Configurator includes support for special characters under certain circumstances, we recommend that you avoid using them in Rule prefixes or suffixes, variable names, and part numbers.