



Infor System21 Configurator

Product Guide

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About this guide

The purpose of this document is to describe the functions that can be used within the Configurator Module.

Intended audience

The guide is intended for any users of the CN Configurator business module.

Related documents

You can find the documents in the product documentation section of the Infor Support Portal, as described in "Contacting Infor" on page 7.

Contacting Infor

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Chapter 1 Overview

Introduction

The Configurator Overview explains the following:

- What Configurator is
- How Configurator fits with other modules
- The benefits that Configurator provides with regard to order entry
- The benefits with regard to production control
- How Configurator works

The overview is based on a simple configuration, which is used as an example throughout the product guide.

What is Configurator?

If your company tailors a product to the specific requirements of a customer, and assembles or manufactures the product to conform to a specific customer order, you need software that presents choices and controls permutations while the order is being placed. The software should then use this information to create the [production order](#).

Configurator displays all the different [options](#) available for the product when your customer calls to place an order. You can set up rules to ensure that incompatible orders are not created. For example, if your customer selects a PVC desk, this cannot have the varnish finish which would be available for the pine desk.

Once configured, the [price](#) of the product is confirmed, allowing product margin control. The software automatically creates a confirmed [production order](#), incorporating all the required [components](#) and operations for the selected [features](#) and [options](#).

Configurator allows you to set up a single production route for your basic product, and then specify all available variations (materials, colour and so on) within that same route.

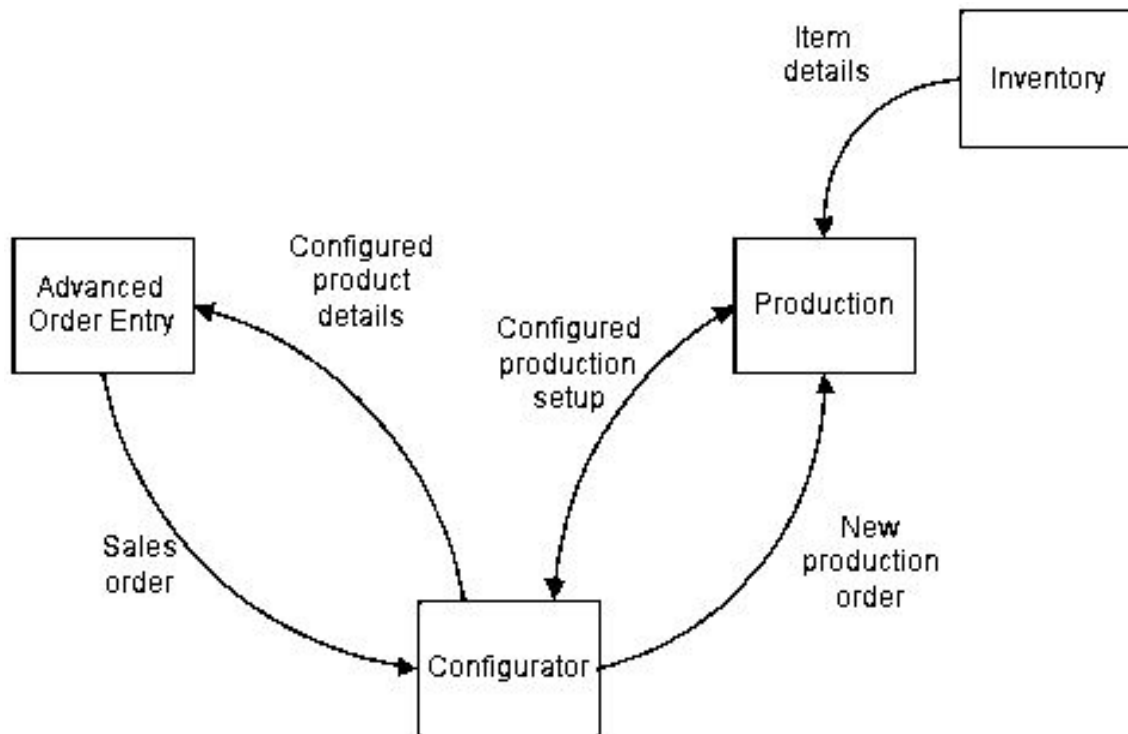
Accurate configuration leads to high customer satisfaction, but the route needs careful control if an accurate configuration is to be created first time and pass without error into production. It is in these areas that Configurator can provide substantial benefits.

Configurator and Other Applications

The main functions of Configurator are:

- To make it easy to configure a sales order by displaying all the available [options](#) when the order is being placed
- To create a [production order](#) to fulfil the sales order
- To calculate [costs](#) and [prices](#) according to the [costing](#) and pricing methods selected
- To make it quicker and easier to set up items and routes

The basic interfaces are illustrated below:



Prerequisites

To run Configurator, you must have the following System21 modules:

- Inventory Management
- Order Entry
- Advanced Order Entry
- Production Definition Management
- Production Control

Other Related Applications

If you use the following modules with Configurator, it provides a comprehensive product set for the configure-to-order market place.

- **Customer Returns** - This module allows you to receive and [optionally](#) match configured products against the original invoice, so you can generate accurate [costs](#) and credit notes.
- **Sales Analysis** - Use this to review invoice details for fully configured products.
- **Transport Planning** - This plans the distribution of configured products by assuming that the fluctuation in pack sizes, weights and volume between variants of the configured product is negligible.
- **Warehouse Management** - This plans the physical storage of configured products, assuming that the fluctuations in pack sizes, weights and volume between variants of the configured product are minimal and insignificant to their storage requirements.
- **Advanced Financial Integrator (AFI)** - Use this to update user defined General Ledger accounts with accurate stock and [cost](#) of sale values.

The Benefits in Order Entry

- All the configuration [options](#) are presented clearly and in the defined sequence.
- All the information necessary for creating the sales order (and a [production order](#), if required) is collected first time. This reduces the likelihood of error, and provides customers with a more efficient service.
- Product permutations are easily controlled. For example, if a customer orders a pine desk, a choice of paint colours is available, but if the customer selects a PVC desk, a paint finish is not offered.
- The presentation of [options](#) on window depends on the user ID, so that it suits the experience and knowledge of each operator.
- Enquiries provide easy tracking of the progress of your sales and [production orders](#).
- Configurator offers three methods of [cost](#) calculation:
 - It can use a [price](#) list [price](#) for the model. This is unchanged for all items configured from that model.
 - It can take the [price](#) as being the sum of the [price](#) list [prices](#) for all [components](#).

- It can take the [price](#) as being the sum of the [cost](#) list [prices](#) for all [components](#), plus operation [costs](#) ([optional](#)), plus a percentage mark up as required.

The Benefits in Production Control

When setting up the route

- If you are using the [pre-configuration](#) process, you need only set up and maintain one [model item](#) and route, instead of items and routes for individual items.
- Once your generic item (for example, paint) and your actual items (for example, green paint, blue paint and so on) are set up, you only have to maintain the generic item.

When creating the sales order

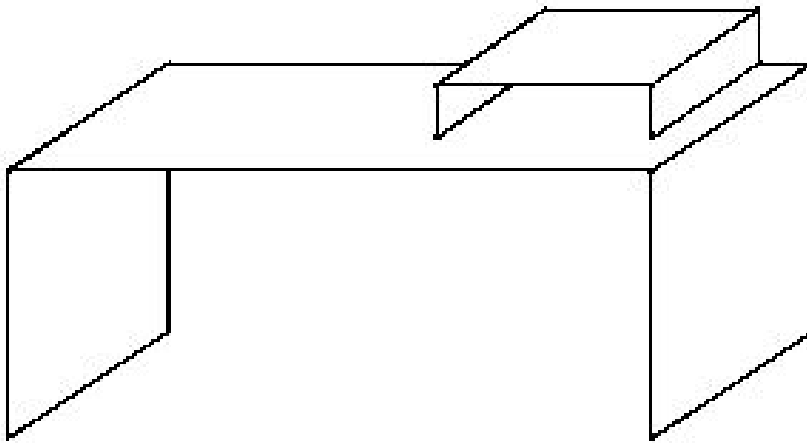
- Once you have created a sales order, the related [production order](#) is automatically created, to fulfill the order.
- The rules that you set up within Configurator should prevent you from creating invalid orders. The rules can ensure, for example, that if a desk has a green top, the sides are also green.

How Configurator Works

Caution: The working of Configurator depends on the careful and accurate organisation of items and routes within the Inventory Management and Production modules.

To achieve this organisation you need a good understanding of how the information you set up will be used and presented by Configurator.

The following paragraphs outline the working methods of Configurator, and introduce essential vocabulary. The concepts are illustrated by a simple example, a desk. Here is an illustration:



Once you understand the ideas and terms used, you are in a position to turn to the implementation procedure, which takes you through implementation step by step.

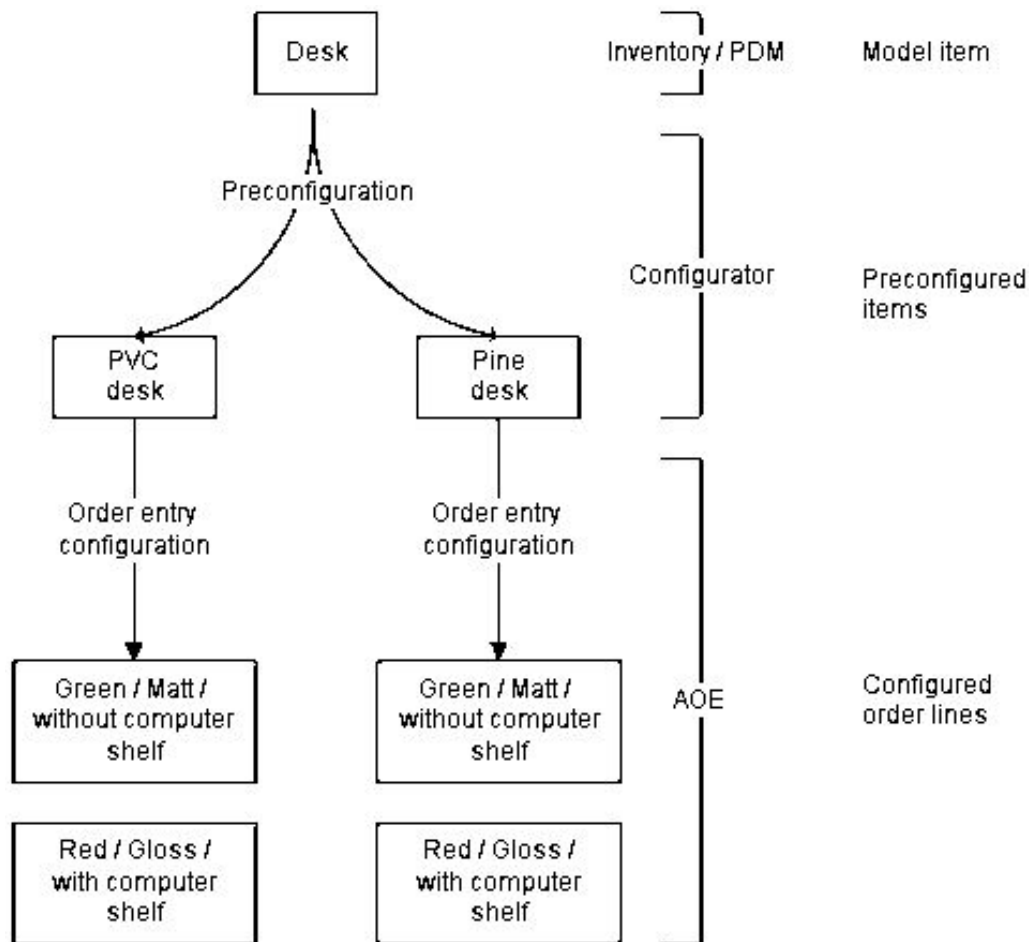
What is Pre-configuration?

When you are taking a customer's order, you can select some [options](#) before the sales order is placed.

If, for example, you have set up the desk as the [model item](#) but wish to have the pine desk and the PVC desk separated as items before the customer places the order, you can pre-configure these.

This involves setting up your [Configurator rules](#) so that the pine desk and the PVC desk are presented as separate items, even though they belong to the same [model item](#).

The diagram below shows when [pre-configuration](#) takes place in the process:



If you decide to pre-configure, when you have set up the [pre-configuration](#), the software automatically creates the following Item Master file records for the pre-configured product:

- Inventory item
- Inventory item/stockroom
- Production item

You can generate the item code itself manually, or you can let it be generated automatically.

What is Order Configuration?

If you do not wish to use [pre-configuration](#), you are saved the work of setting up a model and [base items](#). All you have to do is to set up your item as an [order configured item](#) in Inventory Management, and attach a route to it. (This route must be the [configuration route](#) as defined in the Configurator company profile.)

The software will then present all the [options](#) and [features](#) you have defined for the item when you are taking an order.

The software presents these [options](#) and [features](#) on selection windows. You can tailor the window display to suit an individual operator's preferences, depending on their level of expertise in configuring products.

You can also re-select any number of [components](#) during discussion or negotiation with the customer, as the [price](#) of the particular configuration is displayed on a review window.

Configurator can also display all the [optional](#) operations and [features](#) not yet selected by the customer. You can select any of these to add to the configuration.

Defining the Item

Within the standard System21 Production modules, a [parent item](#), defined within Inventory Management and Production Definition Management (PDM), is attached to a route which specifies all the operations and [components](#) involved in the production of that item.

A [parent item](#) that you want to configure is defined in Inventory Management and PDM in just the same way, except you set a flag in Inventory Management to define the item as a [model item](#). This is the unconfigured basic item whose route holds all the definitions for any configured variation. In our example, it is the desk itself.

The [model item](#) is attached to the route that holds its operations and [components](#). This route is always the [configuration route](#) as specified in the Configurator company profile. This is the only route that can be used by Configurator for the company in question.

If the [configuration route](#) for the [model item](#) contains sets of [features](#) and rules which you would like to use for multiple variations of the [model item](#), you can set up [base items](#). [Base items](#) use the same route, including operations and [components](#), as the [model item](#) with which they are associated, but because they are separate Inventory Management items, their Inventory Management set up can differ from that of the [model item](#).

Defining the Route

The normal series of operations and [components](#) is entered, but the route must hold extra information. Both [components](#) and operations can offer [options](#).

Below is the route for our desk, with the configurations available on this route added as comments:

Operation	Component	Description	Options
0010		Assemble desk	
	0010	2 x Side	The sides and top must be offered in the full range of colours and finishes.
	0020	1 x Top	The colour and finish of both sides and top must

		match. The top can be plain, or it can have a cable hole for the fixing of a computer shelf (optional)
	0030	4 x Screws
0020	Paint desk	This operation is optional , depending on colour chosen.
	0010	Paint Must match desk colour chosen.
0030	Fix computer shelf	If the computer shelf is not ordered, this operation is not performed.
	0010	Computer shelf in black PVC

Characteristics

Our desk is available in a choice of materials (pine and PVC), a choice of paint finish (matt and gloss) and paint colour (blue, green, or red paint, and clear varnish).

In order to control the [options](#) that can be selected, you must set this information up carefully.

You would set up the choice of paint as a [search family](#). Within this, the choices of finish and colour are called [characteristics](#), which you must set up via the Inventory Descriptions file under a major type.

Paint itself is set up as an item in Inventory Management, of the type to be known as a generic item, with its own item code. Each item within this generic item must also be set up in Inventory Management, in the same way as any other item. These items must include every valid permutation of [characteristics](#):

PAINT	Matt	Gloss
Red	Y	Y
Blue	Y	Y
Green	Y	Y
Clear	N	Y

You can see from the above table that seven permutations must be allowed. These, once set up, are known as actual items.

Rules and Messages

Selecting different [characteristics](#) involves complications. If you select a computer shelf, the shelf fix operation is required, while if you do not, the operation is not required. You must specify all such requirements and any invalid permutations in rules. If you try to break a rule, the software displays a message.

You set up and maintain rules separately from the route itself, but you invoke them within the route, as you do messages.

Creating the Production Order

When you have entered a configured sales order, the software creates a confirmed [production order](#) for each configured sales order line. This contains all the selected operations and [optional components](#), as well as any standard [components](#).

The software also transfers any internal sales order line text, plus any text entered during configuration, to the [production order](#).

As long as the [production order](#) is held, that is, not yet released, you can amend the configuration for the product by re-configuring the product in Advanced Order Amend.

The software automatically adds a default planning filter to the [production order](#), so that you can prevent MPS and MRP from re-planning the configured product.

Note: *If Configurator is installed, you can create back-to-back [production orders](#) for standard products using the default route for the product - that is, without any configuration involved.*

Allocate Finished Product

Once the [production order](#) for the configured product is released, Production Control handles it in almost the same manner as a normal [production order](#), with the following differences:

- If you try to amend any key details on the [production order](#), in particular quantity, date or stockroom, a message tells you that the [production order](#) is linked to a sales order line. An exception record is also created.
- If you attempt to release the [production order](#) or to book in finished goods while the associated sales order is suspended, cancelled or a quotation, again a message is issued (and an exception record written).
- Full visibility of linked sales order lines is provided via windows displayed within these transactions (and also from the [production order](#) enquiry). You can select the sales order line and see the [production order](#) enquiry, and vice versa.
- When you book in the finished product, the software automatically allocates the quantity to the associated sales order line, so you can pick and despatch it (using the batch, lot or serial number as its unique reference).

Enquiries

There are three particular types of enquiry that are relevant to a configuration environment:

- The status of a particular order
- The traceability of a particular configuration throughout the processing cycle
- Details of what is contained within a particular configured product

Reports

All of the standard sales and production reports and documents are available for configured products.

The lot/batch/serial number, if used, is printed and gives access to the particular product configuration. The software includes the details of the configured [options](#) on pick lists, invoices, and so on.

In addition, listings are available (with selection criteria) for the following:

- Rules
- Messages
- Items by [search family characteristics](#)

Restrictions

- Although the standard Production modules are available in two modes, base and extended, the Configurator uses only base mode.
- Whether your software is normally base or extended, as soon as you begin to use Configurator, all routes created with the [configuration route](#) automatically use base mode and functionality.
- Configured items can be neither kit [components](#) (because they need to be [priced](#) in Order Entry) nor kit parents (because stock needs to be held against them during order processing).
- The Sales Analysis module does not distinguish between sales of different configurations for the same item. For this reason, Configurator maintains an Analysis file, CNP90, which holds details of the different configurations. You can use Query or another file manipulator to produce an analysis.

Caution: You should take care when setting up rules. Complex rules systems are difficult to implement and any amendment is liable to lead to unforeseen problems.

Implementation Plan

This section is a guide to the planning and implementation of Configurator, and lists the prerequisites of the module, outlining the recommended implementation procedure.

You need to think through the various stages, and produce an implementation plan. All the configuration designers need to be thoroughly familiar with the routes and assemblies to be configured, and you must spend time planning items which are to be generic, which [options](#) are to be taken at [pre-configuration](#) and which at [order configuration](#), and so on. The implementation plan should allow for the training of users, configuration planning, and data entry.

The list below shows the modules involved:

Process	Initiating Module
Set up the item data	(Several)
Create rules	Configurator
Create configured items	Configurator
Select product on customer order line	Advanced Order Entry
Select mandatory components	Configurator
Select optional operations/ components	Configurator
Create customer order line	Advanced Order Entry
Create/amend production order	Advanced Order Entry
Release production order	Production Control
Issue material	Production Control
Report operations	Production Control
Receive finished goods	Production Control
Allocate to customer order	Production Control

Implementation Procedure

After installing the software, the recommended steps for implementing Configurator are as outlined below. You should use this list in conjunction with the detailed sections on each [option](#).

Note: You must set up company details and reference data (work stations, stockrooms and so on) in all prerequisite modules before you start defining Configurator details.

Some Inventory and Production tasks appear on Configurator menus for your convenience. The Inventory Management Items task, for example, can be taken from within Inventory Management, Configurator or Production. It makes no difference which you use.

This implementation guide tells you the order in which to set up Inventory Description file entries, but for general information the complete list is as follows:

- [Configurator rule](#) categories (code RCAT)
- [Configurator message](#) categories (code MCAT)
- [Inventory sources](#) (code INSC)
- Operation codes (code OPCD)
- [Ordering methods](#) (code ORDM)
- [Characteristics](#) (user-defined codes)
- Configurator operation IDs (code CNOI)

Implementation Steps

Note: *This section takes you through the steps necessary to set up Configurator once you have installed it. You will find it useful to read these instructions and carry them out in order.*

Each numbered heading gives the task you must enter and then gives details of what to set up.

Read the instructions carefully, and ensure you understand the terms used. If you are unsure, re-read the relevant section of this overview, or consult the Configurator glossary.

1. The Descriptions Task in Inventory Management [1/INM or 21/CNM]

Set up a [description table](#) for [Inventory Source](#) (INSC), defining a specific and unique value for each of the following item categories in Configurator:

- [Model items](#)
- [Base items](#)
- [Pre-configured items](#)
- [Order configured items](#)
- [Generic components](#)

Note: *The codes M, B, P, O and G are suggested simply because they are the initial letters of each category, and so will be easy to remember, but if you already use any of these INSC codes for another purpose, you must choose different ones here.*

2. The Descriptions Task in Inventory Management [1/INM or 21/CNM]

If you are going to use selection by [characteristic](#), set up a new major type (within the Inventory Descriptions file) for each [characteristic](#), and add all the associated values for each [characteristic](#) required. If the [characteristic](#) was colour for example, you might set up major type COLR with blue, red and green as values within it.

You must set up a new, separate major type for each [characteristic](#) you plan to use.

Note: When entering the codes, you must use V in the Percentage/Value field for the major type; otherwise the codes are not picked up for Configurator prompts.

3. The Descriptions Task in Inventory Management [1/INM or 21/CNM]

Set up an Inventory Descriptions table for [ordering methods](#) (ORDM). You must set up the following specific values:

- 0 - Normal stocked item
- 1 - Make-to-order
- 2 - Purchase-to-order
- 3 - Deliver direct
- 4 - Reserve
- 5 - Configure-to-order

4. The Descriptions Task in Inventory Management [1/INM or 21/CNM]

Set up an Inventory Descriptions table for rule categories (RCAT) and message categories (MCAT).

You must assign every rule and message you use to a category. One RCAT category and one MCAT category is enough unless you wish to use category as a search facility. This would be useful if you use rules extensively.

Note that the codes you set up must not be more than 5 characters long.

5. The Descriptions Task in Inventory Management [1/INM or 21/CNM]

Set up Inventory Descriptions for the Configurator operation ID (CNOI).

You must assign a unique operation ID to each operation within a Configurator route. This must not be unique simply within its own route, but unique for the company. You enter the code when you define the route, and it is mandatory.

6. The Search Families Task in Configurator [3/CNM]

You can only begin this stage when you have set up a major type in the Inventory Descriptions file for each [characteristic](#) you are going to use (see above).

This step involves setting up the [search family](#) codes you are using, defining up to ten [characteristics](#) for each. Configurator uses [search family](#) groups for the following purposes:

- To link a model product with associated base products
- To link a [generic component](#) with its [actual components](#)
- To search for a matching [component](#) based on the specified [characteristics](#)

Thus each model has its own [search family](#), whose code appears in the Inventory item master of each of its related base products.

The same is true of each generic, which is linked to its [actual components](#).

7. The Configurator Company Profile Task in Configurator [1/CNU]

Define the Configurator company profile. The critical settings here include:

- The production route code for configurations
- Item categories (Inventory Management source codes) for model, base, pre-configured and [order configured items](#), and [generic components](#)
- The pricing method to be used for the configured item

8. Either the Items Task or the Linked Item Maintenance Task, both in Inventory Management [2/INM, 10/INM]

Set up Inventory Management Item Master file records for [model items](#) and [base items](#), assigning the [Inventory Source](#) flag as defined for each type of item in the Configurator company profile.

Note: The Linked Item Maintenance task enables you to enter all item maintenance details via a single task, instead of having to switch between tasks.

Inventory offers a base-on facility (Copy Based on Item Creation from Inventory Maintenance) which creates a new item based on an existing one, copying not only the Production details but Inventory Item Master file and stockroom details, as well as other details as requested.

You can set up each item with a default [ordering method](#). This defines the usual method of sourcing for the item when ordered in Advanced Order Entry.

Group together related model and [base items](#) by assigning them the same [search family](#) code. [Optionally](#) define appropriate item search [characteristics](#) for each [base item](#).

9. Either the Items Task or the Linked Item Maintenance Task, both in Inventory Management [2/INM, 10/INM]

Set up Inventory Management Item Master file records for all generic and [actual components](#), assigning the [Inventory Source](#) flag for [generic components](#) only.

You can set up each item with a default [ordering method](#). This defines the usual method of sourcing for the item when ordered in Advanced Order Entry.

Group together related generic and [actual components](#) by assigning them the same [search family](#) code. Define appropriate item search [characteristics](#) for each [actual component](#) by selecting **Item Search Characteristics (F18)**.

10. Either the Stockroom Details Task or the Linked Item Maintenance Task, both in Inventory Management [5/INM, 10/INM]

Set up Inventory item/stockroom records for every model and [base item](#), and every generic and [actual component](#).

You must define any configured items sold within Advanced Order Entry to the sales depot specified for the configured order line.

11. The Production Details Task in Production Definition Management, or the Linked Item Maintenance Task in Inventory Management [3/MDM, 10/INM]

Set up Production Item Master file records for every model and [base item](#), and every generic and [actual component](#).

[Phantom](#) items are supported by Configurator.

12. The Configurator Rules Task and the Configurator Messages Task, both in Configurator [1/CNM, 2/CNM]

Set up [component](#) and operation rules in Configurator, with corresponding messages if required. This requires Inventory Descriptions file codes to be set up for rule categories (RCAT) and message categories (MCAT). No special values are required for these codes.

You can define a set of rules within the module to check the validity of combinations of operations, [components](#) and text formats for particular configurations. The rules operate intelligently during configuration, performing automatic inclusions and exclusions as the configuration is built.

You can set up specific messages which are to be applied either to particular [Configurator rules](#) or to maximum and minimum [component](#) quantities for a configuration.

When a particular rule is broken, or the [quantity per](#) entered for a [component](#) is outside the permitted range, the software displays the appropriate [Configurator message](#). You can split the rules and messages into categories to help search for and select them, particularly if you have defined a large number to the Configurator.

13. The Text Types Task in Production Definition Management [41/MDM]

If Configurator formatted operation text is required, set up text formats in Production Text Types.

14. The Routes/Structures Task in Production Definition Management [21/MDM]

Set up a production route for the [model item](#) or [order configured item](#), using the [configuration route](#) code as defined in the Configurator company profile.

Define all possible [components](#) and operations for the [model item](#). Define whether each one is [optional](#) or mandatory and whether it is selectable during [pre-configuration](#) or at order entry time.

[Optionally](#) define text formats and [Configurator rules](#) to the route.

15. The Pre-configuration Task in Configurator [1/CNP]

If you are using the [Pre-configuration](#) task, generate [pre-configured items](#) in [pre-configuration](#) from model/[base item](#) combinations.

16. The Maintain Price/Discount Profiles Task, the Maintain Price Lists Task and the Maintain Discount Lists Task, all in SOP [4/OEM, 5/OEM, 6/OEM]

Set up your pricing details. This depends on the pricing method you have selected in the Configurator company profile:

Pricing method 0 - Set up the [price](#) list and discount list for the [parent item](#) only.

Pricing method 1 - Set up the [price](#) and discount lists for all [components](#).

Pricing method 2 - This method requires several set-up steps:

- a) Define operation [costs](#) on the Production route.
- b) Run the task (2/MDC) to write Production [costs](#) to a file accessed by Configurator.
(Both a) and b) are used only if the company profile specifies the use of operation [costs](#).)
- c) Create a [cost price](#) list profile for [components](#).
- d) Run the task in Configurator to write [costs](#) to the [cost price](#) lists.
- e) Set up the [cost](#) discount profile for [components](#) if discounts are to be applied.

f) Set up the mark-up percentage for the [parent item](#). This is done in the [cost](#) discount list, using a negative value.

See the Maintenance section for further details.

17. The Configuration Options in Configurator [2/CNP, 3/CNP]

Take orders for configured items in Advanced Order Entry, either by directly entering the configured item code, or by entering a [base item](#) with search type 9 to select from a list of all configured items related to the [base item](#). This allows the configuration to be set by selection of the remaining [options](#). When the sales order is updated, corresponding [production orders](#) are generated to manufacture configured lines.

18. Standard Production Control Tasks

Process the [production orders](#) through Production Control as for normal [production orders](#). When the completed configured items are booked into Inventory, stock is automatically allocated to the configured sales order lines.

Chapter 2 Maintenance

Maintaining Configurator

The maintenance tasks are described here in the order in which you need to use them to set up Configurator. The Configurator Company Profile task is included in this chapter because it is in effect a maintenance task.

Note: *The item maintenance tasks from Inventory and Production are all available from a single task, Linked Item Maintenance. Use this task when setting up your items to avoid having to switch between applications.*

Pricing the Configured Item

The pricing of your configured items depends on how you set the Pricing Method field on Company Profile Maintenance window 2. There are three settings:

- **Pricing method 0**, where the [price](#) is taken directly from the [price](#) list for the [parent item](#).
- **Pricing method 1**, where the [price](#) is the total of all the [component prices](#), taken from [component price](#) lists.
- **Pricing method 2**, where Configurator checks the Inventory Management item [cost](#), and takes the [cost](#) stored in the Configurator [cost](#) list for each [component](#). This is added to the operation [costs](#), picked up from the Production standard [cost](#) set. A margin is then added to this total using a discount list.

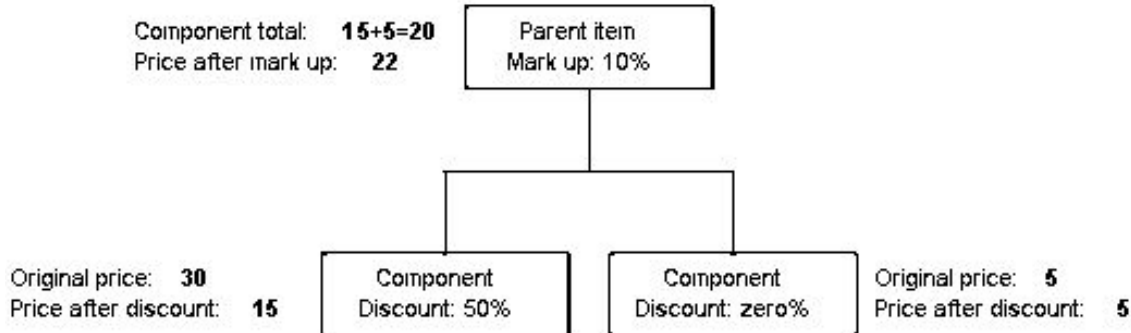
[Price](#) lists for methods 0 and 1 are set up as explained in the Sales Order Processing product guide and work according to standard SOP procedures.

Pricing Method 2 - Details

To set up Pricing Method 2 do the following:

- 1 Define operation costs on the Production route.
- 2 Run the Production Single Item Recost task to write these Production costs to a file accessed by Configurator. Create a cost price list profile for components.

- 3 Enter **1** in the Configurator Cost List field to indicate that the list holds costs (if the profile is a price list) or discounts and margins (if the profile is a discount list).
- 4 Run the Component Costing task to write costs to the cost price lists.
- 5 Set up the cost discounts for components if discounts are to be applied, and in the same list, set up the mark-up percentage for the parent item. Do this by entering a negative value.



When both [cost](#) and margin profiles have been set up, go to the [Component Costing](#) task, which automatically writes the existing [component costs](#) to the lists.

You then enter the discount list task, enter the configured item, and set up the margin which you want to be added to the [cost price](#). This must be entered as a negative value.

Advanced Pricing

If advanced pricing is active for the company (you specify this in the SOP company profile), configured lines will be [priced](#) as follows:

Pricing Method 0

The software [prices](#) the configured item using the Advanced Pricing [price](#) and discount profiles in exactly the same way as for normal order lines.

Pricing Method 1

The software [prices](#) the individual [components](#) for a configuration using the Advanced Pricing [price](#) and discount profiles. The [component prices](#) are rolled up to give the total [price](#) for the configured item. The total [price](#) is registered as a fixed [price](#) for the sales order line.

Note: *Advanced Pricing will always be performed interactively for configured lines if this pricing method is used.*

Pricing Method 2

This method does not use the Advanced Pricing function. You can use Advanced Pricing for normal order lines, but configured lines will be [priced](#) using the standard pricing function.

Search Families [3/CNM]

In Advanced Order Entry, you use this task to define codes and [characteristics](#) for [search family](#) and Certificate of Conformance groups. For details of how search groups and Certificates of Conformance are used, refer to the Advanced Order Entry product guide.

However, within Configurator, [search family](#) codes have more specific uses:

- To link a [model item](#) to related [base items](#)
- To link [generic components](#) to related [actual components](#)
- To define individual [characteristic](#) codes and values to aid the search and selection of [base items](#) and [components](#) during configuration (to search for a matching [component](#) based on the specified [characteristics](#))
- To link a [feature](#) with its [optional components](#)

The [search family](#) is set up in three stages:

Stage 1

Create an Inventory Descriptions file major type and associated code for each of the [characteristics](#) to be defined to the family, for example:

Characteristic Type:	Paint colour
Description File Major Type:	COLR
Description codes:	RED BLUE GREEN

Stage 2

Define the [search family](#) itself:

Define new search family:	PNT (Paint)
Define up to 10 characteristics to the search family :	FNSH (Finish) COLR (Colour)
Select each characteristic from the description file to define the ones allowed within this search:	Matt - Red Matt - Blue Gloss - Blue

Stage 3

Within Inventory item maintenance, define the [search family](#) to which the [component](#) belongs together with its [characteristics](#):

Component item:	PBLMT (Blue matt paint)
Search Family Code:	PNT (Paint)
Characteristic 1:	COLR=BL (Blue)
Characteristic 2:	FNSH=MT (Matt)

This is done for each [component](#) item within the family.

You use the Items task in Inventory Management to define [search family](#) codes and their related [characteristic](#) values to individual items.

The [search family](#) contains up to 10 [characteristics](#) and each [characteristic](#) can have an unlimited number of defined values.

The [components](#) assigned to the [search family](#) each have a set of [characteristic](#) values.

Example:

Generic component:	Paint
Search family :	PNT (Paint)
Actual Component #1:	PBLMT - (Blue matt)
Characteristics of #1:	Paint - Blue Finish - Matt
Actual Component #2:	PRDGL - (Red gloss)
Characteristics of #2:	Paint - Red Finish - Gloss

Search Family/Certification of Conformance Code Maintenance Details Window

To display this window, select the Search Families task. Enter a new or existing [search family](#) on the [Search Family](#)/Certificate of Conformance Maintenance Selection window and then press Enter.

You use this window to select the [characteristic](#) within the [search family](#) that you want to maintain.

Fields

Code

The [search family](#) that you have selected is displayed at the top of the window.

Description

Enter or amend the [search family](#) description.

Select (Sel)

Enter 1 to select a [characteristic](#) to maintain the list of permitted values within this [search family](#).

Present Seq

This field displays the [presentation sequence](#) of the [characteristic](#). Specify the sequence in which [characteristics](#) are presented for a [feature](#) within the [search family](#).

Characteristics Description

Enter a description for this [characteristic](#). You can define up to 10 [characteristics](#).

Number of Decimals

Enter a number from 0 to 5 to represent the number of decimal positions associated with the [characteristic](#). If this field is blank, the software assumes they are alpha characters.

Note: *You cannot change the decimal place details once they have been entered.*

This field must be left blank if the [characteristic](#) is associated with a [characteristic](#) code.

Code

You can, if you wish, define each [characteristic](#) to a [characteristic](#) code. This means you can define a set of permitted values to the [characteristic](#). If you do this, you must first set up the code as a major type in the Inventory Descriptions file.

Untitled

The text defined against the [characteristic](#) code in the Inventory Descriptions file is displayed alongside the code.

No. of Values

This field displays the number of different values currently allowed for the [characteristic](#) code. Enter 1 against a [characteristic](#) code to maintain this field.

Functions

Refresh (F5)

Use this to refresh the window and display the data as it was when you entered the task and before you made any amendments.

Delete (F11)

Use this to delete the [search family](#) code and its associated [characteristics](#). Deletion is not allowed if the code is already attached to an item as a [search family](#).

When you have entered or amended the required [characteristics](#), select **Update (F8)** to update the details.

Characteristic Values Pop-up

To display this pop-up, enter 1 in the Selection field and then press Enter on the Search Value/Certificate of Conformance Code Maintenance Details window.

You use this pop-up to select or re-sequence a set of values for the [characteristic](#).

The list displayed is the list of all the values you set up for this [characteristic](#) using the Descriptions task. This means that you can set up different sets of permitted values for the same [characteristic](#) code in different [search family](#) codes.

Fields

Untitled

This field displays the [characteristic](#) code whose permitted values you are maintaining.

Seq

Select values by specifying the sequence in which they are to appear on displayed lists.

Code

The field displays the actual values for the [characteristic](#).

Description

This field displays the text describing the [characteristic](#) value as defined in the Inventory Descriptions file.

Select **Update (F8)** to update the data and re-display the [Search Family](#)/Certificate of Conformance Code Maintenance Details window, on which you can select another [characteristic](#) to maintain or select **Update (F8)** again to update.

Configurator Company Profile [1/CNU]

This task controls the workings of Configurator, and you should carefully consider all settings for their far-reaching implications.

Caution: Take great care if you amend existing profiles, because of the effect this may have on existing data.

Company Profile Maintenance Window 1

To display this window, select the Configurator Company Profile task.

Fields**Configuration Route**

Use this to specify the Production route code to be used as the [configuration route](#) for this company. The route you enter in this field is the only route you can use for configuration for this company.

You use this [configuration route](#) when defining routes for model and configured items.

You must define [model items](#) and [order configured items](#) to this route code in route maintenance. You will also assign this route code to newly-defined [pre-configured items](#) at the end of [pre-configuration](#).

Item Creation

Enter one of the following:

0 - To create [pre-configured item](#) details in batch

1 - To create [pre-configured item](#) details interactively

You create [pre-configured item](#) details at the end of [pre-configuration](#), based on the modified model route, and the item details set up for the [base item](#).

Item Code Generation

Enter one of the following:

0 - To enter item codes manually during [pre-configuration](#)

1 - To allow the system to generate codes automatically

The software generates codes using a [base item](#) code prefix and a unique sequence number as the suffix.

If you enter **1** here, you must also specify how you want the software to generate item codes for [pre-configured items](#) at the end of [pre-configuration](#). You do this by completing the next three fields.

Base Item Code Length

If you want the software to generate your [pre-configured item](#) codes automatically, specify the number of characters from the [base item](#) that you want to use as a prefix.

Item Code Delimiter

If you want the software to generate your [pre-configured item](#) codes automatically, specify the character you want to appear between the [base item](#) code prefix and the unique sequence number.

If you do not have a particular preference, you could use / or *.

Variation Number Length

If you want the software to generate your [pre-configured item](#) codes automatically, specify the number of figures to appear in the unique sequence number suffix.

For example, a variation number length of 3 will allow up to 999 unique [pre-configured item](#) codes to be generated. A variation number length of 5 will allow 99999 unique codes.

Model Items

Use this to specify the Inventory Management source field value that is to identify [model items](#).

You must have set up this value in the Inventory Descriptions file, major type INSC, and it should be reserved for the definition of [model items](#) in the Inventory Management Items task.

You use [model items](#) to define the high level route which contains all possible operations and actual or [generic components](#) for a particular group of configurable products. You then use the model route as the basis for the definition of route details of individual configured items in [pre-configuration](#).

Base Items

Use this to specify the Inventory Management source field value that is to identify [base items](#).

You must have set up this value in the Inventory Descriptions file, major type INSC, and it should be reserved for the definition of [base items](#) in the Inventory Management Items task.

You use [base items](#) to define the item master records from which individual configured item details are copied during [pre-configuration](#). When you enter a model/[base item](#) combination in Route Maintenance, you form the basis for the definition of a new [pre-configured item](#). You can also use [base items](#) to attach parent type rules to a configuration, or to aid the search and selection of a [pre-configured item](#) during Order Entry.

Pre-configured Items

Use this to specify the Inventory Management source field value that is to identify [pre-configured items](#).

You must have set up this value in the Inventory Descriptions file, major type INSC, and it should be reserved for the definition of [pre-configured items](#) in the Inventory Management Items task.

[Pre-configured items](#) are generated in [pre-configuration](#) from a model/[base item](#) combination. When an Item Master file record is written for the new [pre-configured item](#), it will automatically be updated with the [inventory source](#) value entered in this field.

Order Configured Items

Use this to specify the Inventory Management source field value that is to identify [order configured items](#).

You must have set up this value in the Inventory Descriptions file, major type INSC, and it should be reserved for the definition of [order configured items](#) in the Inventory Management Items task.

You create order-configured items in Inventory Management, and these then have a route created for them in Production. No model or [base item](#) is required, and the [pre-configuration](#) process is unnecessary. Configurator ensures that all [features](#) and [options](#) are presented during Order Entry.

Generic Components

Use this to specify the Inventory Management source field value that is to identify [generic components](#).

You must have set up this value in the Inventory Descriptions file, major type INSC, and it should be reserved for the definition of [generic components](#) in the Inventory Management Items task.

[Generic components](#) define the [features](#) of a configuration. You define these [generic components](#) to the [configuration route](#), and when you are configuring the order you replace them with [actual components](#) selected from the same [search family](#).

Update Audit Files

Enter one of the following:

0 - Not to create audit records

1 - To create audit records whenever rules and messages are maintained

Auditing takes up disk space, so use it only if you know you need the information.

The following are the Configurator audit files:

- CNP40A - Rule header audit
- CNP42A - Rule detail audit
- CNP44A - Route rules audit
- CNP46A - [Configurator messages](#) audit

Press Enter to see the second Company Profile Maintenance window.

Company Profile Maintenance Window 2

To display this window, press Enter on the first Company Profile Maintenance window.

Fields

Order Entry Costing

This field is relevant only if you set the Pricing Method field on this window to **2**. If you set that field to another pricing method, set this field to **0**.

Enter one of the following:

0 - No [costs](#)

Use this setting if you are not using pricing method 2.

1 - Roll up operation [costs](#) only

2 - Roll up [component costs](#) only

3 - Roll up [component](#) and operation [costs](#)

Costing of Despatches

Enter one of the following:

0 - Inventory [costs](#) at despatch

You can use this with any pricing method.

1 - Order entry [costs](#)

This is valid only if you set the Pricing Method field on this window to **2**.

Pricing Method

Enter one of the following:

0 - If you will set up [price](#) and discount lists for each configured item

1 - To roll up the [prices](#) of all [components](#) from the [price](#) list

2 - To roll up the [cost](#) of all [components](#) and operations, plus the mark-up percentage defined for the configured item on a discount list

If you choose [option 2](#), the Order Entry [Costing](#) field must be set to one of the roll up [options](#) (1, 2 or 3).

This field determines how your configured item will be [costed](#).

Selection Method

This field determines whether the software will prompt you with a window to help you select the values you want.

Enter one of the following:

0 - Direct (for the average user with some experience)

1 - Prompted (for inexperienced users)

2 - Unprompted (for the expert user)

These three settings are explained in more detail below.

You can use different settings for different user IDs, so that more experienced users are not prompted while others have prompts. You do this by entering the user IDs as description codes under major type USID in the Inventory Descriptions file. The tax flag is used to indicate the choice: 1 is Prompted, 2 is Unprompted and any other value is Direct.

You can change your chosen prompt at any time, so you can select one simple [feature](#) in direct mode and a more complex one in prompted mode.

Direct (lists [components](#))

The direct mode is where the [components](#) are represented by item codes and descriptions and you select one from the list:

Item	Description
PBLGL	Paint - blue gloss
PBLMT	Paint - blue matt
PRDGL	Paint - red gloss

Using this method, all variants are displayed on one window.

Prompted (lists [characteristics](#))

The prompted mode displays each [characteristic](#) in a separate window, listing all available [options](#). Therefore, the first window will display one [characteristic](#):

Value	Description
GL	Gloss finish
MT	Matt finish

Once you have selected that, a window will display the next [characteristic](#):

Value	Description
RD	Red paint
GR	Green paint
BL	Blue paint

CL	Clear varnish
----	---------------

Unprompted (enter [characteristics](#) directly)

The unprompted mode shows a list of [characteristics](#). You must then actively enter the value required. This means that you need to know what values are valid, although a prompt is always available, listing the values.

Characteristic	Value (input field)
Finish	Input as required
Colour	Input as required

Order Analysis Level

Enter one of the following:

1 - For the software to record operation and [component](#) details for analysis

[Phantoms](#) remain unexploded.

2 - For the software to record operation, [component](#) and [characteristics](#) for analysis

[Phantoms](#) remain unexploded.

This enables you to store the particular [features](#) and [options](#) selected for a configured order. The software stores the information in the Analysis file, CNP90, which you can then manipulate as required.

You should consider the amount of storage this might involve. The amount of information stored by [option 2](#) depends on the number of [characteristics](#) you have defined and are using.

Press Enter to update the profile and leave the task.

Configurator Rules [1/CNM]

You use this task to set up the rules which are to govern the configuration of your configurable items. These rules specify the inclusion or exclusion of operations, [components](#), [characteristics](#) or text formats for the item.

Once you have set up these rules, you specify them when you are setting up the route. You can also apply them to the configuration during [pre-configuration](#), and while entering a sales order.

You can base each [rule test](#) on detecting a unique value for any of the following:

- **C** - A [characteristic](#)
- **I** - A [component](#) item code
- **O** - An operation number or code
- **P** - A [parent item](#) code (that is, the base, pre-configured or [order configured item](#) code)

You then specify the action to be taken if the test is satisfied. This can be the automatic inclusion or exclusion of any of the [components](#) or operations when building the configured product.

You can issue a user-defined message. These are of two types. They may be critical (in which case you cannot proceed without amending the current configuration) or memo (you can override the message).

You have to assign each rule to a [rule category](#). You must have already set up these categories in the Inventory Descriptions file (major type RCAT). You can, if you wish, define and use one category only, but if you define a large number of messages, you may want to use more than one category. You can then use these categories to help you search for a particular rule. The categories must be codes of not more than 5 characters in length.

The rules have a common format. They fall into two parts:

If the [rule test](#) is satisfied...**Then** invoke the [rule actions](#).

Rule/Action	Comment
If MATL=PVC And O=PNT	If you have selected the paint operation for a PVC desk...
Then MSG001=You cannot paint a PVC surface.	...then display this message.
If I SHELF=1	If the optional computer shelf is selected...
Then INCL O SHF	...Then include the fix shelf operation.

Maintain Configurator Rules Window 1

To display this window, select the [Configurator Rules](#) task. Enter a new or existing rule code and then press Enter.

You use this window to enter or amend [Configurator rule](#) details.

Fields

Rule Number

This field displays the rule selected for addition or amendment.

Untitled

Enter or amend text to describe the rule being maintained.

Category

Enter or amend the code of the [rule category](#) to which this rule belongs. This field is mandatory.

Rule categories help you search for and select [Configurator rules](#). You set them up using the Inventory Descriptions file, under major type RCAT.

You can set up just one category and assign all your rules to it, but if you have a large number of rules, you will find that dividing them into categories will help you search and select rules.

Select **Update (F8)** to save the amended rule header details.

Functions

Delete Rule (F11)

Use this to delete the rule and all associated tests and actions.

Maintain Tests (F13)

Use this to maintain tests and actions for the rule.

Select **Maintain Tests (F13)** to display the second Maintain [Configurator Rules](#) window.

Maintain Configurator Rules Window 2

To display this window, select **Maintain Tests (F13)** on Maintain [Configurator Rules](#) window 1.

You use this window to maintain [rule tests](#) and [rule actions](#) for your selected rule, and, if required, to attach messages to a rule.

[Rule tests](#) may comprise either a single test, multiple *and* tests or multiple *or* tests.

[Rule actions](#) specify what will be done when all the tests for the rule are satisfied during configuration. [Rule actions](#) may consist of the inclusion or exclusion of operations, [components](#), all [components](#) with particular [characteristics](#), or specific text formats.

The window is split into two sections. In the upper section, you enter [rule tests](#). In the lower section, you enter the corresponding [rule actions](#).

Caution: You must not enter a message as a rule action on its own. You must specify an actual action as well as a message.

For example, do not specify the [rule test](#) as:

```
If paint = varnish
```

```
And finish = matt
```

and the [rule action](#) as:

```
Then display the message Varnish cannot be matt.
```

You should specify the test as:

```
If paint = varnish
```

and the action as:

```
Then exclude finish = matt
```

And display the message:

```
Varnish cannot be matt.
```

Fields**Select (Untitled)**

Enter **4** to delete a [rule test](#).

Test Type

Specify a code to indicate the type of [rule test](#):

I - To test [components](#)

P - To test [parent items](#) (that is, base or configured item codes)

C - To test item search [characteristics](#)

O - To test operations

S - To test standard variables (for example, to find out the quantity ordered)

There is a set list of variables you can use in the test and these are:

- [Price](#) of [component](#) (base)
- [Price](#) of [component](#) (prime)
- Unit [price](#) of [component](#) (base)
- [Cost](#) of [component](#) (base)
- Total [cost](#) of configured item (base)
- Customer
- Customer delivery sequence
- Stockroom
- Quantity ordered
- [Quantity per](#)

V - To test run time variables

Use this if you need to match a variable. For example, if a customer orders item 1 with accessory 4, the software can ensure that item 1 is the same colour as accessory 4, without you having to set up an individual rule for each individual colour.

SFC

If you are entering a test on item search [characteristics](#) or variables, enter the [search family](#) code to which the [characteristics](#) belong. Leave this field blank for all other test types.

Item

For a test on items ([component](#) or parent), or for variables, enter the required item code. For a [characteristic](#) test, enter a [characteristic](#) code within the selected [search family](#) group. Leave this field blank for an operation test.

For a standard variable test, you must enter the relevant code from the list below. Select the variable you want to test on, and enter the corresponding code in the Item field:

- [Price](#) of [component](#) (base) - *BPRI
- [Price](#) of [component](#) (prime) - *PRIC

- Unit [price](#) of [component](#) (base) - *UNPR
- [Cost](#) of [component](#) (base) - *CCST
- Total [cost](#) of configured item (base) - *COST
- Customer - *CUSN
- Customer delivery sequence - *DSEQ
- Stockroom - *PSTR
- Quantity ordered - *QTOR
- [Quantity per](#) - *QPER

Operation

For an operation test, enter the code of the operation. Leave this field blank for all other test types.

Test

A [characteristic](#) test may be set up to check a [characteristic](#) value against the value specified in the test according to any of the following conditions:

EQ - Equal to

NE - Not equal to

GT - Greater than

GE - Greater than or equal to

LT - Less than

LE - Less than or equal to

For an operation test, only the conditions EQ (equal to) or NE (not equal to) are allowed.

Leave this field blank for item test types.

Value

For a [characteristic](#) test only, enter the actual value of the specified [characteristic](#) that is to be tested for. For a variable test, enter the literal *VALUE. Leave this field blank for all other test types.

And/Or

For multiple [rule tests](#), enter AND on the first test line if all tests must be fulfilled to trigger the action of the rule. Enter OR if only one test needs to be fulfilled.

Select (Untitled)

Enter 4 to delete a [rule action](#).

Actn

Enter one of the following:

I - To include the item, [characteristic](#), operation or text format specified

E - To exclude the item, [characteristic](#), operation or text format specified

C - If the message attached to this action is to be critical

This means that the message, once displayed, will show until the error condition is rectified.

M - If the message attached to this action is to be memo

This means that the message, once displayed, can be ignored and processing can continue.

Actn Type

Enter one of the following to indicate the type of [rule action](#):

I - An action on [component](#) item codes

T - An action on text formats

C - An action on item search [characteristics](#)

This is the only action type allowed for a run time variable test.

O - An action on operation codes

If you attach a message by selecting **Messages (F13)**, the message is added and shown by **C** in the Action Type field for a critical message or **M** for a memo message. You can amend this code here. The message code itself is displayed in the Value field.

SFC

If you are entering an action on item search [characteristics](#), enter the [search family](#) code to which the [characteristics](#) belong. Leave this field blank for all other action types.

Item

If you are entering an action on [component](#) items, enter the required item code. For a [characteristic](#) action, enter a [characteristic](#) code within the selected [search family](#) group. Leave this field blank for an operation or text action.

Operation

If you are entering an operation action, enter the code of the operation. Leave this field blank for all other action types.

Test

You can set up a [characteristic](#) action to check a [characteristic](#) value against the value specified in the action according to any of the following conditions:

EQ - Equal to

NE - Not equal to

GT - Greater than

GE - Greater than or equal to

LT - Less than

LE - Less than or equal to

For an operation or text action, only the conditions EQ (equal to) or NE (not equal to) are allowed.

Leave this field blank for item action types.

Value

For a [characteristic](#) action only, enter the actual value of the specified [characteristic](#) that is to be tested for. For a run time variable test, enter the literal *VALUE. Leave this field blank for all other action types.

If this line is indicating that a message has been attached to the action, the message code will be displayed here. It is not maintainable.

Functions

Messages (F13)

Use this to select the message you want to be displayed if the [rule test](#) and action are satisfied. This displays the Maintain [Configurator Messages](#) window. For details, refer to the [Configurator Messages](#) section.

Once you have attached a message, it is shown by a **C** (critical message) or **M** (memo message) in the Action Type field. The code of the message is displayed in the Value field.

Page Up/Page Down

Both the upper and lower sections of this window have a plus sign (+) at the right-hand side. This indicates that you can use **Page Up** and **Page Down** to see or enter more [rule tests](#) and actions.

The position of the cursor determines which section of the window responds when you use **Page Up** and **Page Down**, so make sure you position the cursor in the correct section before you page.

Select **Update (F8)** to update rule details.

Configurator Messages [2/CNM]

You use this task to set up and amend the messages you use with your rules.

You can attach specific warning or error messages to [Configurator rules](#) via the [Configurator Rules](#) task. You can also display messages on any violation of maximum or minimum quantities for [components](#) on a configuration (via the Route/Structure task within Production).

Note: *If you have not defined specific messages, the software displays standard messages for rule or [component](#) quantity errors during configuration.*

You must assign each message to a [message category](#). These categories must have been set up in Inventory Descriptions (major type MCAT) already. You can define and use one category only, but if you have set up a large number of messages you can set up more categories. Using more than one category helps you if you need to search for a particular message. The categories must be codes of not more than five characters in length.

Maintain Configurator Messages Window

To display this window, select the [Configurator Messages](#) task, enter the message you wish to define or amend and then press Enter. Alternatively, select **Messages (F13)** on the Maintain [Configurator Rules](#) window 2.

You use this window to define or amend a [Configurator message](#).

Fields

Message Category

Enter or amend the [message category](#) to which the message belongs. Message categories aid the search and selection of messages. They are set up in the Inventory Descriptions file under major type MCAT.

Message Severity

Enter one of the following:

M - To create a memo message

This is a warning message and can be ignored by the user.

C - To create a critical message

This is an error message, forcing the user to take action.

If the message is defined to a maximum or minimum [component](#) quantity, the severity you enter here will be that used by the software, because the [message severity](#) cannot be changed.

If the message is defined to a rule, the severity you enter here will act as a default only, because the severity can be changed within [Configurator Rules](#).

Message

Enter or amend the text of the message itself.

Select **Update (F8)** to update the message.

Component Costing [4/CNM]

If you are using pricing method 2 ([cost plus](#)), you will want to transfer your item [costs](#) to a [price](#) list (to be called a [cost price](#) list to distinguish it from normal [price](#) lists) so they can be picked up when pricing.

This task writes these [costs](#) to a [cost price](#) list automatically. You must first have set up the [price](#) profile in Sales Order Processing, and you must be authorised to the profile before you can use it.

All [costs](#) are in base currency.

Configurator Component Batch Costing Window

To display this window, select the [Component Costing](#) task.

You use this window to enter the [costing](#) details for a specified batch.

Fields

Model Item

Enter the range of [model items](#) for which you wish to create [cost price](#) lists.

Price List

Enter the [cost price](#) list you want to create.

Effective Date

Enter the date from which the [cost price](#) list is to be used.

Press Enter to submit a job to create [cost price](#) list details.

Routes/Structures [21/MDM]

The Routes/Structures task in the Production Definition Management module of Production is used by Configurator to define the operations, [components](#) (generic and actual) and text for Configurator [model items](#) and [order configured items](#) which will appear as user choices during configuration.

The software will present extra [options](#) specific to Configurator while you are entering your route, as long as all of the following conditions are satisfied:

- Configurator is attached for the company
- The item you are maintaining is a [model item](#) or configured item
- The route code is the [configuration route](#) for the company

Note: For details of the definition of [model items](#), [configured items](#) and the [configuration route](#), refer to the *Configurator Company Profile* section.

For details of the standard functions available in the Routes/Structures maintenance task, refer to the Production Definition Management product guide.

Each route may contain:

- Standard and [optional](#) operations
- Standard and [optional components](#)
- [Generic components](#), for example, paint (an [actual component](#) for the generic paint could be green matt paint), either mandatory or [optional](#)
- Rules to be applied to the product
- Default [option](#) for [features](#)
- Minimum and maximum quantities of a [component](#)

- [Presentation sequence](#) of operations, [components](#) and [features](#)
- Operations and [features](#) specified as being either pre-configured or selectable when the order is placed

Process Route Maintenance Inputs Window

To display this window, select the Routes/Structures task.

Enter your [model item](#) and the [configuration route](#), and then press **Enter** to see the Process Route Header Maintenance window. Complete this window as necessary (refer to the Production Definition Management product guide for more details) and then press **Enter** again to see this window, which will not have route details showing if you entered a new model or a new [order configured item](#).

Select an operation with 1 to see the Route Operation Maintenance window.

Route Operation Maintenance Window

To display this window, select an operation with 1 on the Process Route Maintenance Inputs window. This window has only one Configurator field.

Fields

Configurator Op ID

Enter the unique code for this operation. This is the code that rules will use to identify it.

Every operation within a [configuration route](#) must have its own operation ID set up under the major type CNOI in the Inventory Descriptions file. This is so that any rules know the operation to which they are attached.

Functions

Formatted Text (F23)

Use this to maintain Configurator [formatted text](#).

Enter the operation details and then press Enter to display the Configuration [Options](#) pop-up.

Configuration Options Pop-up

To display this pop-up, enter the operation details and then press Enter on the Route Operation Maintenance window.

This pop-up allows you to change the configuration [options](#).

Fields

Type

Enter one of the following:

0 - If this operation is [optional](#) within the configuration

1 - If this operation is mandatory

Mandatory operations must be part of a configuration and cannot be deleted.

Presentation Sequence

Specify the sequence in which the operation is to appear during configuration.

This defaults to the normal operation sequence.

Rule Section

Enter the relevant [rule section](#).

A [rule section](#) is used to group together sets of [Configurator rules](#) so that they can be applied to a particular section of the route. This field defaults to the operation sequence number.

Order Entry Option

Enter one of the following:

0 - If the operation is a pre-configure [option](#)

1 - If the operation is an order entry [option](#)

Use this to specify whether the operation is selectable in [pre-configuration](#) mode or in order entry mode. This [option](#) is still relevant even if you entered **1** in the Type field above to indicate a mandatory operation.

If an [order configured item](#) is being defined, this field is fixed at **1**, because no [pre-configuration](#) is to take place.

Note: The maximum and minimum [component options](#) are for memo purposes only and are not currently used elsewhere in the system.

Functions**Rules (F20)**

Use this to select [Configurator rules](#) to apply to this section of the route. This displays the Apply Rules to Route pop-up.

Press Enter to save these details to a work file and then select **Replace Route (F8)** on the Process Route Maintenance Inputs window to update the details.

Apply Rules to Route Pop-up

To display this pop-up, select **Rules (F20)** on the Configuration [Options](#) pop-up or the Input Item Maintenance pop-up.

This pop-up displays the existing [Configurator rules](#) that apply to this section of the route, and allows you to apply more rules. You can also select a rule for removal from the route, and enquire on rule details.

Fields

Rule Test Section

This field displays the section of the route to which [rule tests](#) apply for the rules displayed in the list. You can define a [rule section](#) on the Configuration [Options](#) window, where you set up operations, and on the Input Item Maintenance window, where you set up [components](#).

Select (Untitled)

Enter one of the following:

4 - To remove a rule from the route

This does not delete the definition of a rule, but removes it from this particular route.

5 - To enquire on rule details

Seq

This field displays the sequence number of the rule. This affects the order in which rules will be actioned for the route.

Rule

This field displays the code of the [Configurator rule](#).

Description

This field displays the description associated with the rule in the [Configurator Rules](#) task.

Untitled

This field displays the sequence number for addition. When you are adding a new rule to the route, specify the sequence in which it is to appear in the list and be processed during configuration.

Untitled

This field displays the rule code for addition. When you are adding a new rule to the route, specify the code associated with the rule.

Press Enter to update and return to the previous pop-up.

Input Item Maintenance Pop-up

To display this pop-up, select a [component](#) and then press Enter on the Process Route Maintenance Inputs window.

You only see this pop-up if Configurator is attached and you are defining a model or configured item to the [configuration route](#).

Any Configurator [options](#) you define to [generic components](#) will apply equally to the [actual components](#) you select to replace those generics during configuration.

Fields

Input

Enter the [component](#) item that is required at this production stage. You must define within this operation all [components](#) that are required at this stage of the process.

Issuing Stockroom

Enter the stockroom from which this [component](#) will be issued to this operation.

If you leave this field blank, the software will use the primary stockroom as defined in the Item Master file record.

All material requirements planning using this route will place a requirement on this stockroom for the [component](#).

Quantity per Lot

Enter the standard quantity of this [component](#) that is required by this operation to produce the standard parent lot size.

Fixed Quantity Per

Enter one of the following:

Blank - If the quantity required is dependent on the lot size of the parent

1 - If the quantity is fixed

Shrinkage %

Enter the percentage you expect to lose or waste as a result of this process. The software uses this figure to extend the [quantity per](#) when calculating the quantity required for the operation. It is also used as part of the standard [cost](#) roll up, to establish the correct amount of [component](#) usage in an item.

See the Production product guide for extended details of shrinkage and examples of material requirement calculations.

Change Reference

Enter a reference to group together route/operation/[component](#) combinations, (for example, as a result of an engineering change which affects a range of items or routes). The field can hold an engineering change note or a drawing reference.

Effective From Date

Enter the first date on which this [component](#) is effective within this operation. If you leave this field blank, the software assumes that there is no start date limitation on the use of this [component](#).

To Date

Enter the date on which this [component](#) ceases to be effective in this operation. If you leave this field blank, the [component](#) is assigned an open-ended expiry date.

Note: All the following fields (except the final [Component Sequence](#) field) are specific to Configurator:

Type

Enter one of the following:

- 0 - If the [component](#) is [optional](#)
- 1 - If the [component](#) is mandatory

Use this to specify whether the [component](#) is mandatory or [optional](#) within the configuration. Mandatory [components](#) must be part of a configuration if the operation to which they are defined is itself included in the configuration.

You can define generic items as mandatory. This does not mean that the generic item itself must be included, but that one of its actuals must be.

Allow Qty Override

Enter one of the following:

- 0 - If the [quantity per](#) is fixed in Configurator
- 1 - If the [quantity per](#) is variable

Use this to specify whether you want the [quantity per](#) for the [component](#) to be maintainable during configuration.

Presentation Sequence

Specify the sequence in which the [component](#) is to appear within its operation during configuration.

This setting can be crucial, as it may control the order in which rules are presented to the user. This affects the actual logic of the program that the rules constitute.

Refer to the section dealing with rules maintenance for further details regarding this issue.

The field defaults to the [Production sequence](#).

Rule Section

Use the [rule section](#) to group together sets of [Configurator rules](#) so that you can apply them to a particular section of the route. This field defaults to the operation sequence number.

Order Entry Option

Enter one of the following:

- 0 - If the [component](#) is selected in [pre-configuration](#)
- 1 - If the [component](#) is selected in order entry

For [order configured items](#), this is fixed at 1.

Min Qty

If quantity override is allowed for the [component](#), specify the minimum permitted [quantity per](#) one of the [parent item](#).

Msg

Specify the message you want to be displayed if a user enters a [quantity per](#) which is less than the permitted minimum for the [component](#) during configuration.

If you do not enter a specific message here, the software will display a standard message.

You can prompt on valid [Configurator messages](#) and within the prompt you can also create a new message.

Max Qty

If quantity override is allowed for the [component](#), specify the maximum permitted [quantity per](#) one of the [parent item](#).

Msg

If a user enters a [quantity per](#) which is greater than the permitted maximum for the [component](#) during configuration, you can specify the message you want to be displayed.

If you do not enter a specific message here, the software will display a standard message.

You can prompt on valid [Configurator messages](#) and within the prompt you can also create a new message.

Default Input

If the [component](#) you are maintaining is a [generic component](#), you can specify a default [actual component](#) to replace the [generic component](#) during configuration. The [default component](#) and [generic component](#) must be in the same [search family](#).

You can then replace the [default component](#), during configuration, with any other [actual component](#) within the same [search family](#). A prompt is available on items defined to Production.

Component Sequence Increment

If you are adding [components](#), you can set the increment between [component](#) sequence numbers yourself. The default is 10 if the starting sequence is a multiple of 10; otherwise the default is 1.

Functions**Delete (F11)**

Use this to delete the [component](#) from this operation on the route.

Rules (F20)

Use this to select [Configurator rules](#) to apply to this section of the route. This displays the Apply Rules to Route pop-up.

Press Enter to write the details to a work file and then select **Replace Route (F8)** on the Process Route Maintenance Inputs window to update the details.

Select Text Format Pop-up

To display this pop-up, select **Formatted Text (F23)** on the Route Operation Maintenance window.

Use this pop-up to select and sequence one or more text formats for the operation.

Note: *You have to set up these formats in the Production Text Types task in order for them to appear in this pop-up.*

Fields

Position To

To position the list to a particular text format, specify a text format code and then press **Enter**.

Select (1)

Enter **1** against a text format to select it. This selection field is not available unless the text format has a sequence number defined to it.

Seq

Enter a sequence number to define the order in which the selected text format is to appear during configuration.

Select **Update (F8)** when you have entered the sequence number. The format will then have a selection field against it.

Fmt

This field displays the code of the text format.

Description

This field displays the text format's description, as defined in the Production Text Types task.

To maintain the selected format, enter 1 against it and then select **Update (F8)**.

When you have finished maintaining the text format, select **Previous (F12)** to return to the Route Operation Maintenance window.

Formatted Text Maintenance Pop-up

To display this pop-up, enter a new, unique sequence number to define a new format and then press Enter. Alternatively, you can enter 1 against an existing format and then press Enter on the Select Text Format pop-up.

You use this pop-up to maintain the Configurator [formatted text](#) for an operation, within the limits specified in the Production Text Types task for the format.

Fields

Number of Lines Allowable

This field displays the maximum number of text lines that you can enter for this format.

Number of Lines Used

This field displays the number of lines of text you have entered for this format so far.

Key

This field displays the reference code of the text you are maintaining. The reference depends on whether you are maintaining the text in route maintenance, order entry or [pre-configuration](#).

Type

This field displays the text type you are maintaining, alongside the sub-type and description for the text.

Line

This field displays the sequence number of the corresponding text line.

Heading

This field displays, or allows you to maintain, the heading for the text line. You specify whether maintenance is to be allowed for this field in the Heading Override field on the Sub-type Description window.

Untitled

The window displays up to four text lines. You can use **Page Down** to see more lines. Enter up to the permitted number of lines of text for this format.

Position to Line Number

Specify the line number at which you want to position the text.

Insert

Specify the number of new lines to be inserted.

Lines after Line Number

Specify the line number after which to insert new lines.

Delete Lines From

Enter the first line you want to delete.

To

Enter the last line you want to delete.

Select **Update (F8)** to update.

Text Types [41/MDM]

In Production Definition Management you can set up and maintain text against routes, operations, work stations, [cost](#) centres, work centres and [production orders](#).

If Configurator is attached for your company, you can also maintain [formatted text](#) for operations on the configured route. You set up each format as a text sub-type within the text type that you set up as the operation text type in the Production company profile.

This section only explains how to set up operation text formats for Configurator. For full details of text management within Production, refer to the Production Definition Management product guide.

Text Type Maintenance Window 1

To display this window, select the Text Types task.

Use this window to select the text types you want to maintain.

Fields

Major Type

To maintain a Configurator [formatted text](#) format, enter the text major type that you set up as the operation text type in the company profile.

Subtype

Leave this field blank.

Functions

Display Sub-Types (F17)

Use this to display a list of sub-types defined to the major type you entered.

Select **Display Sub-Types (F17)** to see Text Type Maintenance window 2.

Text Type Maintenance Window 2

To display this window, select **Display Sub-types (F17)** on Text Type Maintenance window 1.

This window displays a list of sub-types currently set up for the major type and allows you to select individual sub-types for maintenance.

If Configurator is attached and operation text is being maintained, each sub-type represents an individual format which can be attached to an operation on the configured route in the Production Routes/Structures task.

Fields

Major Type

This field displays the major type you are maintaining.

Subtype

This field lists the sub-types already defined to this major type.

Description

This field displays the description for each sub-type.

No. Lines

This field displays the maximum number of lines of text allowed for the format.

Text Length

This field displays the maximum number of characters of text allowed per line.

O/E Optn

One of the following is displayed:

0 - If this is a [pre-configuration option](#)

1 - If this is an order entry [option](#)

Enter Sub-type to Maintain or Add

Enter the sub-type you want to create or maintain and then press **Enter**.

To maintain an existing or new format, enter the required sub-type code in the Enter Sub-Type to Maintain or Add field and then press Enter. The Sub-Type Description pop-up is displayed.

Sub-Type Description Pop-up

To display this pop-up, enter a new or existing sub-type and then press Enter on Text Type Maintenance window 2.

Use this window to specify [options](#) for Configurator formatted operation text.

Fields**Untitled**

Enter or amend the description for this category of sub-type text.

Number of Lines

Specify the number of lines of text to be allowed when you select this format to enter [formatted text](#).

Text Length

Specify the number of characters to be allowed on each line when you select this format to enter [formatted text](#).

Heading Override

Use this to specify whether heading text for each line of [formatted text](#) is maintainable during configuration.

Enter one of the following:

0 - If heading text is only maintainable in route operation maintenance

1 - If heading text is also maintainable during configuration

Order Entry Option

Use this to specify whether this format is for an order entry or a [pre-configuration option](#).

Enter one of the following:

0 - If the format is a [pre-configuration option](#)

1 - If the format is an order entry [option](#)

Print on Works Order

Use this to specify whether text for this format is to be printed on [production order](#) documentation when entered for a configured order line.

Enter one of the following:

0 - Not to print text

1 - To print text

Quantity Sensitive

This field is not currently used in the standard system.

Enter your details and then press Enter to update.

Chapter 3 Processing

Configurator Processing

You have now created one of the following:

- A [model item](#) with an associated [base item](#) and route, which is ready to be pre-configured (if [pre-configuration](#) is required), and then configured during order entry
- An item with an associated route which is defined in Inventory Management as an [order configured item](#), and which will not be pre-configured, but which will be configured during order entry

After Initial Selection

After you have selected the initial item, [pre-configuration](#) and order entry configuration share the same processing routines. This product guide will therefore deal with these processes together. Any differences that do exist between pre-configure and order entry processing will be pointed out in the text at the appropriate point.

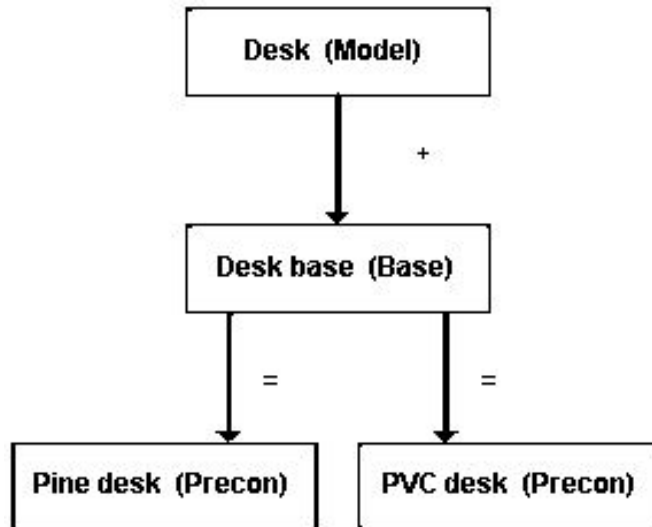
Pre-configuration [1/CNP]

Use this task to incorporate selected configuration [options](#) into an item before that item is ordered. Our desk example, available in pine or PVC, is to be pre-configured so that the pine version and the PVC version exist as separate items.

The main advantage of [pre-configuration](#) is that it simplifies the rules and route. If you left the configuration until the order entry stage, the rules and route sequencing could become very complex.

When you pre-configure, you specify the [model item](#) which provides the Production route details, and the [base item](#) which provides the Inventory Management item master and stockroom details and the Production item master details.

The [pre-configuration](#) process will create the item detail records for the new item. It can also create the item code automatically, depending on how you set the Item Code Generation field in the



Configurator company profile.

When you set up the route for the [model item](#) in Production, you flagged each Configurator activity as either an order entry activity or not. The [Pre-configuration](#) windows now present for configuration those activities that you specified as not being order entry activities (in the above example, this would include the choice of material, pine or PVC).

The code of the [pre-configured item](#) generated in [pre-configuration](#) is the one you use in order entry to enter a configured order line.

You can also associate a [pre-configured item](#) with a particular customer.

Pre-configuration Window

To display this window, select the [Pre-configuration](#) task.

You use this window to enter the details for a new [pre-configured item](#) or to amend an existing item. You can associate a specific customer with the configured item.

Note: You must have set up a [base item](#) as well as a [model item](#) in order to pre-configure.

This task offers you three functions. You should use different selection fields depending on which function you want. The list below tells you which fields to use in each case (remember that you can use the Customer fields to associate the item with a customer, whichever function you choose):

- If you want to create a new [pre-configured item](#), enter the model in the Model field and enter the [base item](#) in the Base or Configured Item field.

- If you want to amend an existing [pre-configured item](#), enter the [pre-configured item](#) in the Base or Configured Item field.
- If you want to create a new [pre-configured item](#) whose route is to be based on an item other than the model, do the following:
 - Enter the [base item](#) to provide the Inventory Management details in the Base or Configured Item field.
 - Enter the item to provide the route details of the new item in the Existing Configured Item field.

Fields

Model Item

Enter the [model item](#) you want to use as the basis for creating a [pre-configured item](#) during [pre-configuration](#). The [model item](#) must be defined to the [configuration route](#) for the company. The Inventory Item prompt is available.

Base or Configured Item

If you want to create a new [pre-configured item](#), enter the [base item](#) from which to copy Inventory Management details. If you enter only a [model item](#) and press **Enter**, the software displays a list of valid [base items](#).

If you want to maintain an existing [pre-configured item](#), enter the code of that item. The Inventory Item prompt is available.

Customer

You can pre-configure items for a specific customer. To do this, enter the account and address code of the customer. A prompt is available on valid customers.

Existing Configured Item

You can use an existing [pre-configured item](#) rather than a [model item](#) to provide the route details on which to base the creation of a new [pre-configured item](#). You also have to enter a valid [base item](#) in the Base or Configured Item field. The Inventory Item prompt is available.

Functions

Existing Configurations (F7)

You have to enter a valid model and [base item](#) before selecting this function.

Use this to display a list of [pre-configured items](#) previously generated from the combination of model and [base items](#) that you have entered. You can then select the required [pre-configured item](#).

Characteristics (F9)

You have to enter a valid model and [base item](#) or a valid [pre-configured item](#) before selecting this function.

Use this to enter item search [characteristics](#) for a base or [pre-configured item](#). The item must be defined to a [search family](#).

Once this window is completed, press Enter. You then begin the process of defining your configuration.

Note: As the process of creating a [pre-configured item](#) is exactly the same as creating an [order configured item](#) in Advanced Order Entry, it is explained only once, in the Configuration section.

Order Entry/Order Amend [2/CNP, 3/CNP]

[Order configuration](#) is a means of skipping the procedure of setting up a model and [base item](#) and pre-configuring items from the base. Instead, you set up the order-configured item, define a route for it, and once you have set up the rules you can go straight into order entry for all configuration [options](#).

With [order configuration](#), [options](#) are taken at order entry time. The software can then create a [production order](#) for the configured item.

In Advanced Order Entry, the pre-configured or [order configured item](#) is ordered on a normal sales order line. Configurator works within the task, so that you can configure the line to the customer's requirements.

The following sections deal with the ordering procedures specific to configured and [make to order](#) processing. For full details of order capture in Advanced Order Entry, refer to the Advanced Order Entry product guide, but note that all stockrooms you wish to sell from must be defined as depots.

Select the Order Entry task to display the standard order header window. Complete the header details only, without entering an order on the header window and then press **Enter** to go to line entry. You now have a choice of the following two entries:

- Enter the code of the pre-configured or configured item together with the order quantity. Pre-configured and configured items are included in the standard Inventory Item prompt.
- Enter a [base item](#) and the search type 9 if you want a prompt. A window allows you to select a customer if you wish to restrict the items listed. The prompt then lists all pre-configured and configured items for that base (and customer if specified).

When you have selected your item and have entered a quantity, press **Enter**. If you entered **1** in the Override field at the bottom of the line entry window, you would then go to the Order Line Overrides window (if you did not, you would go into the configuration process itself and should now go to the Configuration section).

Order Line Overrides Pop-up

To display this pop-up, select an item and enter a quantity and then press Enter. Enter 1 in the Override field at the bottom of the Advanced Order Entry Line Entry window.

You use this pop-up to enter the order line override details.

Fields

Calc Price

This field displays the [price](#) of the configured item calculated according to the pricing method and order entry [costing](#) in the company profile. You can use this [calculated price](#) to help in the negotiation of a fixed [price](#) for the line, if necessary.

Price List

This field displays the [price](#) list used for the order, but you can change it. Any new [price](#) list must be in the same currency as the order.

Fixed Price

If you want to charge a fixed [price](#), enter the amount in this field. Leave this field blank to use the [price](#) list.

Disc. List

This field displays the discount list used for the order, but you can change it. Any new discount list must be in the same currency as the order.

Fixed Discount

If you want to use a fixed discount percentage, enter it in this field. Leave this field blank to use the discount list.

Due Date

This field displays the order due date. Enter the order line due date if it is different. It cannot be earlier than the current (system) date.

Enter Text

If you wish to maintain the order line text which appears on external documents, enter **1** and press **Enter**. The External Order Line Text window is displayed.

Configurator

Enter one of the following:

- 1 - To configure the line
- 2 - Not to configure the line

If Configurator is attached and this order line is for a configured item, this field controls entry to the configuration [options](#). If you enter **1**, you can select operations and [components](#) for the configured line.

This field is pre-set to **1** for [pre-configured items](#). If you amend the order line, the field defaults to **0**.

Order Method

This field displays the default order method for the item. Normally you can amend this field, but for a configured line the order method is fixed. You can use several order methods for the same line, by overriding this field when amending.

The following methods are available:

- 0 - Sell from stock (that is, allocate normally)
- 1 - [Make to order](#)
- 2 - Purchase to order
- 3 - Direct delivery purchase to order
- 4 - Reserve against existing supply orders
- 5 - [Configure to order](#) (for configured items only)

Methods 1, 4 and 5 ([make to order](#), reservations against [production orders](#), and [configure to order](#)) are only allowed if Production and Configurator are attached for the company.

Methods

This field displays codes representing the [ordering method](#) or methods so far used for this order line. The codes indicate the following methods:

- WO - [Production order](#) (for [make to order](#) or configured lines)
- RS - Reserved against a production or purchase order
- BB - Back-to-back purchase order
- DD - Back-to-back purchase order with direct delivery

Certificate

Enter one of the following:

- 0 or blank - If you do not require a certificate of conformance for the order line
- 1 - If you require a certificate of conformance for the order line

Quantity

You must enter the quantity ordered for delivery on the nominated delivery date.

UOM

Enter the unit of measure of the order line if it is different from the issue unit. The unit of measure must be any one of the purchase, stocking or issue units set up for the item in Inventory Management.

Allocated

This field displays the quantity currently allocated for the line.

Reserved

This field displays the quantity currently reserved against supply orders for this line.

Outstanding

This field displays the quantity currently outstanding (that is, neither allocated nor reserved) for this line.

Parent Line

If the order line is a kit [component](#), enter the parent order line number. You cannot change this after you have entered the order line.

Kitting is not allowed for configured items.

Functions

Resv (F13)

Use this to reserve stock against an existing supply order. See the Production product guide for more details.

Additional Overrides (F16)

This displays more details on the Additional Details window. See the Production product guide for more details.

Configuration

Once you have selected the configured item you want to work with, the configuration processes in [pre-configuration](#) and order entry modes are almost identical.

These configuration processes are as follows:

- [Option](#) selection
- [Characteristic](#) display and selection
- Configuration review
- Operation selection
- [Component](#) selection
- [Formatted text](#) maintenance
- [Reactive rule](#) processing

Option Selection Pop-up

To display this pop-up, select the item you wish to pre-configure or configure and then enter Configurator.

If your configuration requires you to select actual items from mandatory [generic components](#), the software displays the [Option](#) Selection pop-up. Otherwise, it displays the Configuration Review window.

This pop-up lists the [actual components](#) defined to the [search family](#) that is displayed at the top of the window.

The pop-ups you see depend either on how you set the Selection Method field on the Company Profile Maintenance window 2, or on your user ID's own selection method (set up in the Inventory Descriptions file under major type USID). See the Company Profile Maintenance Window 2 section for more details.

Fields

Generic Component

This field displays the [generic component](#), which will be replaced by the [actual component](#) selected from the displayed list.

Search Family

This field displays [search family](#) to which the generic and [actual components](#) belong.

Select (Sel)

Enter one of the following:

- 1 - To select a [component](#) from the displayed list
- 5 - To display the search [characteristics](#) defined to the [component](#)

This displays the [Characteristics](#) Display window.

Item

This field displays the [actual components](#) related to the generic item.

Quantity

This field displays, for each [component](#), the quantity of the [component](#) required to make one of the [parent item](#).

Description

This field displays the Item Master file descriptions for each [component](#).

Discounted Unit Price

If you are in order entry, this field displays the unit [price](#) of the [component](#), in prime currency, with any [component](#) discount accounted for. [Prices](#) are not displayed in [pre-configuration](#) mode.

Item

Instead of selecting an item from the displayed list, you can enter the required [component](#) directly into this field.

Functions

Next Panel (F8)

Use this to proceed to the next pop-up without making a selection.

Unprompted Selection (F15)

Use this to enter [search family characteristics](#) to identify the required [component](#). This displays the [Characteristic](#) Selection (Unprompted) pop-up.

You need a good knowledge of the configuration and items to use this way of selecting items.

Prompted Selection (F16)

Use this to select from prompted lists of [search family characteristics](#) to identify the required [component](#). This takes you to the [Characteristic Selection \(Prompted\)](#) pop-up.

This is a simple way of selecting items by [characteristic](#), as each [characteristic](#) is displayed in turn.

Characteristic Display Pop-up

To display this pop-up, enter 5 against a [component](#) on the [Option Selection](#) pop-up.

This pop-up displays the [characteristics](#) set up for the [component](#) you selected. [Characteristics](#) aid the search and selection of the appropriate [component](#) for the configuration.

Note: *If the pop-up is empty, check the following:*

Note: *That you have set up the [search family](#) correctly*

Note: *That each item master has had the search values set up (**Item Search [Characteristics](#) (F18)**) in Inventory Management, on Item Maintenance Details window 2)*

Note: *That the conditions set up in the rules allow a selection to be made*

Fields

Description

This field lists the [characteristics'](#) descriptions.

Code

This field lists the [characteristics'](#) codes.

Press Enter to return to the [Option Selection](#) pop-up.

Characteristic Selection (Unprompted) Pop-up

To display this pop-up, select **Unprompted Selection (F15)** on the [Option Selection](#) pop-up or enter 2 in the Selection Method field on the Company Profile Maintenance window 2.

Use this pop-up to enter [characteristics](#) as part of the selection of [component options](#) for the configuration. By using this pop-up you narrow down the list of [components](#) from which to choose. [Characteristics](#) are entered in Inventory Item Master file maintenance for each item within the [search family](#).

Fields

Characteristic

This field displays a description of the [characteristic](#) for which a value may be selected.

Value

Enter a value for the corresponding [characteristic](#).

Enter valid [characteristic](#) values and then press Enter. The [Option](#) Selection pop-up is re-displayed with the list of [components](#) limited to those matching the [characteristics](#) you specified. If only one [component](#) matches, this is selected automatically.

Characteristic Selection (Prompted) Pop-up

To display this pop-up, select **Prompted Selection (F16)** on the [Option](#) Selection pop-up or specify 1 in the Selection Method field on the Company Profile Maintenance window 2.

Use this pop-up to enter [characteristics](#) as part of the selection of [component options](#) for the configuration. By using this pop-up, you narrow down the list of [components](#) from which to choose. [Characteristics](#) are entered in Inventory Item Master file maintenance for each item within the [search family](#).

Fields**Characteristic**

This field displays the description of the [characteristic](#) for which the list of values is displayed.

Code

This field displays the code defined to the [characteristic](#) within the [search family](#). Alongside it is the text defined to the [characteristic](#) code in the Inventory Descriptions file maintenance task.

Select (Untitled)

Enter 1 to select a [characteristic](#) value from the displayed list.

Value

This field displays the codes of the [characteristic](#) values available for selection.

Description

This field displays the description for each [characteristic](#).

Functions**Return (F14)**

Use this to return to the [Option](#) Selection pop-up.

After the last [Characteristic](#) Selection pop-up, the [Option](#) Selection pop-up is re-displayed with the list of [components](#) limited to those matching the entered [characteristic](#) values. If only one [component](#) matches, this is selected automatically.

Configuration Review Window

When you have selected all the configurable [components](#) for mandatory operations, this window is displayed.

You use this window to review configuration details and make any amendments, deletions or additional selections for operations and [components](#) within the configuration.

The top part of the window shows the [parent items](#) for the configuration, together with the [configuration route](#) code. If you are in order entry mode, a total unit [price](#) for the configuration is displayed in prime currency with any [component](#) discounts accounted for.

The middle part of the window lists operations and [components](#) currently selected for the configuration.

Fields

Select (S)

Select a valid [option](#) for the corresponding detail line.

For operations, the following [options](#) are available:

- 1 - To display the [Component](#) Selection pop-up
- 2 - To maintain [formatted text](#)
- 4 - To delete an [optional](#) operation

For [components](#), the following [options](#) are available:

- 1 - To select an [actual component](#) from a generic [feature](#)
- 4 - To delete an [optional component](#)

Order entry [options](#) cannot be maintained in [pre-configuration](#) mode and *vice versa*.

Oper/Component

This field displays the item code of an actual or [generic component](#). Mandatory [components](#) are highlighted.

If a [generic component](#) is listed, you cannot update the configuration until you have replaced it with an [actual component](#).

Quantity

For [components](#), this field displays the quantity of the [component](#) required to make one of the configured item.

If the [quantity per](#) is variable for the [component](#), you can amend it to another value, as long as that value is within the permitted range.

Description

This field displays a description of the operation or [component](#).

Discounted Unit Price

If you are in order entry mode, this displays the unit [price](#) of the [component](#), in prime currency, with any [component](#) discount accounted for. [Prices](#) are not displayed if you are in [pre-configuration](#) mode.

T

This field contains an asterisk (*) if [formatted text](#) exists.

Cat

This field displays the category of the operation or [component](#) line, according to the following codes:

OPN - Operation

GEN - [Generic component](#)

DFT - [Default component](#) within generic [feature](#)

ACT - [Actual component](#) selected for generic [feature](#)

Blank - Normal [component](#), that is, one not associated with a generic [feature](#)

Functions**Rules Check (F9)**

Use this to check all the [Configurator rules](#) that apply to this configuration, resetting [rule actions](#) accordingly. If any rule violations exist, the Rule Application Messages pop-up will list the errors.

Works Order Text (F21)

Use this to enter Production item text for the configured item (if in pre-configure mode) or [production order](#) text (if in order entry mode).

Select Operations (F22)

Use this to display a list of operations for this configuration, so that you can select [optional](#) operations. This displays the Operation Selection window.

When you have selected all the required operations and [components](#), select **Update (F8)** to update the configuration.

Operation Selection Window

To display this window, select **Select Operations (F22)** on the Configuration Review window.

Use this window to select the individual [optional](#) operations that are to be included in the configuration.

Fields**Select (Sel)**

Enter **1** to select an operation for the configuration.

Op Code

This field displays the sequence number of the operation on the [configuration route](#).

Description

This field displays the description for the operation as entered in route maintenance.

Text

This field contains an asterisk (*) if [formatted text](#) exists for the operation.

Press Enter to update.

Component Selection Pop-up

To display this pop-up, enter 1 against an operation on the Configuration Review window.

Use this pop-up to select particular [components](#) to appear on the configuration for the selected operation.

Fields**Operation**

This field displays the sequence number of the operation on the [configuration route](#).

Description (Untitled)

The description for the operation, as entered in route maintenance, is displayed alongside the operation sequence number.

Select (Sel)

Enter 1 to select a [component](#) for the configuration.

Component

This field displays the item code of the [component](#) on the selection list. Mandatory [components](#) are highlighted.

Quantity

This field displays the quantity of the [component](#) required to make one of the configured item.

If the [quantity per](#) is variable for the [component](#), you can amend it to another value as long as that value is within the permitted range.

Description

This field displays a description of the [component](#).

Disc Unit Price

This field displays the [discounted unit price](#). If you are in order entry mode, this field displays the unit [price](#) of the [component](#), in prime currency, with any [component](#) discount accounted for. [Prices](#) are not displayed in [pre-configuration](#) mode.

Cat

This field displays the category of the [component](#) line, according to the following codes:

GEN - [Generic component](#)

DFT - [Default component](#) within generic [feature](#)

ACT - [Actual component](#) selected for generic [feature](#)

Blank - Normal [component](#) - that is, one not associated with a generic [feature](#)

Press Enter to update.

Rule Application Messages Pop-up

If one or more rules were broken when you updated the configuration, this pop-up is displayed, listing the rule violations.

This pop-up is also displayed if you select **Rule Check (F9)** on the Configuration Review window and rule violations have occurred.

If the violated rule was attached to a specific message, that message is displayed. Otherwise, a standard message is displayed.

If the message is highlighted, it is of a critical severity, and you must amend the configuration to conform to the rule. If no critical errors exist, amendment of the configuration is at your discretion.

Fields**Select (Untitled)**

Enter **5** to enquire on rule details.

Functions**Display Detail/Message Only (F10)**

Use this to toggle between expanding and contracting the amount of information displayed for each message.

Proceed (F13)

Use this to proceed with your processing.

Configuration End Processing

When you have selected all the details of the configuration and the configuration is updated from the Configuration Review window, subsequent processing depends on the mode of configuration. You will therefore see the Configurator Trailer window if you are in [pre-configuration](#), and the Sales Order Line Entry window if you are in order entry configuration.

Configurator Trailer Window

To display this window, select **Update (F8)** on the Configuration Review window.

Note: You have to be in [pre-configuration](#) to see this window. If you are in order entry configuration, you will see the Sales Order Line Entry window instead.

You use this window to specify details for the creation or amendment of a [pre-configured item](#). This includes the primary stockroom for the item and ([optionally](#)) the specific customer for whom the [pre-configuration](#) is being created.

Fields

Configured Item

This field either displays, or allows entry of, a code for the new or modified [pre-configured item](#). This depends on how you set the Item Code Generation field on the Company Profile Maintenance window 1.

Item Description

Enter a description for the [pre-configured item](#). For a new [pre-configured item](#), this defaults to the [base item](#) description.

Primary Stockroom

Use this to specify the Inventory Management stockroom in which this [pre-configured item](#) will usually be stored. For a new [pre-configured item](#), this defaults to the primary stockroom for the [model item](#) on the [configuration route](#).

Customer

You can pre-configure items for a specific customer. To do this, enter the account and address code of the customer to be associated with this configuration. A prompt is available on valid customers.

Customer Item Code

If the [pre-configured item](#) is for a specific customer, enter the reference by which the customer refers to the [pre-configured item](#). You can then use this reference in Order Entry to help search for the [pre-configured item](#).

Functions

Update (F8)

Use this to update the [pre-configured item](#) details. If a new [pre-configured item](#) is being specified, Item Master file details will be created for the [pre-configured item](#).

Characteristic Entry (F9)

Use this to enter item search [characteristics](#) for the [pre-configured item](#).

Select **Update (F8)** to generate or amend the [pre-configured item](#) details. A window is displayed, which allows you to maintain item search details for the new [pre-configured item](#).

Sales Order Line Entry Window

To display this window, select **Update (F8)** on the Configuration Review window.

Note: *You have to be in order entry configuration to see this window. If you are in [pre-configuration](#), you will see the Configurator Trailer window instead.*

A sales order line is created for the configured item and control returns to the line entry window in Advanced Order Entry. When you have entered the order, a [production order](#) is automatically created to manufacture the configured item.

In order entry mode, when the configuration is updated from configuration review, a sales order line is updated for the configured item.

[Price](#) details are updated on the configured line, based on the pricing method in operation, and whether you are using standard or advanced pricing.

Note: *If you previously established a fixed [price](#) for this configured line, but you amend the configuration details so that the total [price](#) of the configured line is different, the software displays the Order Line Override window in Advanced Order Entry. You can then review the fixed [price](#) against the new [calculated price](#) and make any adjustment.*

When you update the sales order details at the end of order entry or amendment, a [production order](#) is automatically created or amended for any configured line for which configuration details have been entered or amended.

Note: *If you are in Order Amend and a [production order](#) already exists for a configured line, you can only amend configuration details up until the time the [production order](#) is released.*

Note: *If you are in Order Amend and a [production order](#) has not yet been created, you cannot amend the configuration details on the configured line.*

For full details of order capture in AOE, refer to the Advanced Order Entry product guide.

Chapter 4 Enquiries

Configurator Enquiries

If you are working in a configure-to-order environment, you need:

- Efficient communication between the sales and production sections of the company
- Traceability of specific configurations of a product within the system

Configurator does not provide its own enquiries, as the enquiries which follow display the configurations and orders affected by configuration, fulfilling these requirements.

Order Status Enquiries [/OEE]

These provide a link from the sales order line to any connected supply orders, including any [production orders](#) linked through configuration or make-to-order processing.

Enquire on Orders [1/PCE]

This provides a link into line enquiries for any connected sales orders. A function displays the sales order Reservations Enquiry window.

Enquire on Lot Trace [26/INL]

Each configured product, or batch of product, must have a unique identifier - that is, the batch, lot or serial number which is assigned at finished goods receipt time and which will be physically attached to the product (stamped, labeled and so on).

By using this reference number, the Inventory Management Enquire on Lot Trace task provides a full history of the product including all inputs issued to the [production order](#) together with the finished goods receipt(s) and all customer order issues and returns.

There are three particular types of enquiry which are relevant to a configuration environment:

- The status of a particular order
- The traceability of a particular configuration throughout the processing cycle
- Details of what is contained within a particular configured product

Enquire on Routes/Structures [7/MDE]

This task displays operations and inputs and you can toggle between the Production operation sequence and the Configurator [presentation sequence](#).

Enquire on Inputs Where-used [11/MDE]

Press **Enter** from the standard enquiry to display a window of additional Configurator [options](#).

Chapter 5 Reports

Configurator Reports

All of the standard sales and production reports are available for configured items. In addition, you can print the following Configurator reports:

- [Configurator rules](#)
- [Configurator messages](#)
- Items by [search family characteristic](#)

The Supply/Demand Exceptions task is included from Advanced Order Entry.

Each report prints on standard listing paper, with 132 print positions, and prints a new page on overflow.

Sales Documentation

Instead of the [components](#) within a configured item being invisible, you can choose to have such [components](#) detailed on acknowledgements, pick and despatch notes, and on invoices.

The [component](#) selected, its description and required quantity are documented.

Configurator Rules [1/CNR]

Use this task to print a report of rule details. You can print a specific rule, all rules, or all rules in a particular [rule category](#). The report includes header, test, action and rule message details.

Configurator Rule Print Window

To display this window, select the [Configurator Rules](#) task.

Fields

Rule Number

If you only want to print one rule, enter that rule in this field.

Leave both selection fields blank to print all [Configurator rules](#).

Category

If you want to print all the rules defined to a category, enter that [rule category](#) in this field.

Leave both selection fields blank to print all [Configurator rules](#).

Press Enter and then select **Submit Report (F8)** to submit a job to produce the report.

Configurator Messages [2/CNR]

Use this task to print [Configurator message](#) details for a specific message, all messages, or all messages in a particular [message category](#).

The text of each message is printed on the report.

Configurator Message Print Window

Select [Configurator Messages](#). You can select either a specific message or a [message category](#).

Fields**Message Number**

If you only want to print one message, enter the message code to print.

Leave both selection fields blank to print all [Configurator messages](#).

Message Category

If you want to print all the messages defined to a category, enter the [message category](#) in this field.

Leave both selection fields blank to print all [Configurator messages](#).

Press Enter and then select **Submit Report (F8)** to submit a job to produce the report.

Item by Characteristics [3/CNR]

Use this task to print [characteristic](#) details for items in a specified [search family](#).

The report lists items defined to the selected [search family](#) group, with their individual [characteristics](#) displayed as selected.

Since all [characteristics](#) and values are displayed you can print exactly the details you want. If you want to print all details for your selected [search family](#), you can go through the selection windows, selecting **Select All (F15)** each time.

Item by Characteristic Window

To display this window, select the Item by [Characteristics](#) task.

Fields

Search Family Group

Enter the [search family](#) group on which you want to report.

Press Enter to see the [Characteristic](#) Selection pop-up.

Characteristic Selection Pop-up

To display this pop-up, press Enter on the Item by [Characteristic](#).

This pop-up displays all the [characteristics](#) in the [search family](#) group.

Fields

Select (S)

Enter 1 against up to 10 selected [characteristics](#) to appear on the Item by [Characteristic](#) report.

Functions

Select All (F15)

This selects all the [characteristics](#) in this pop-up.

If you have made your selection by entering 1 against [characteristics](#), press Enter to see the first [Characteristic](#) Values pop-up.

If you selected **Select All (F15)**, you will see the first [Characteristic](#) Values pop-up without pressing Enter.

Characteristic Values Pop-up

If you made your selection by entering 1 against [characteristics](#) on the [Characteristic](#) Selection pop-up, press Enter to see the first [Characteristic](#) Values pop-up. If you selected **Select All (F15)** on the [Characteristic](#) Selection pop-up, you will see the first [Characteristic](#) Values pop-up without pressing Enter.

You now have to select the values you want to print for each [characteristic](#). The [characteristic](#) is displayed at the top of the pop-up.

This pop-up is re-displayed with different lists, and you select from each one until you have selected the values for all the [characteristics](#) you selected on the [Characteristic](#) Selection pop-up.

Fields

Select (1)

Enter **1** against a [characteristic](#) value to select it for printing.

Functions

All (F15)

This selects all the [characteristic](#) values in this window.

Select the required [characteristic](#) values and then press Enter to display the next [Characteristic](#) Values pop-up. When you have selected values for each required [characteristic](#), the Item by [Characteristic](#) window is re-displayed and you can select **Submit Report (F8)** to submit a job to produce the report.

Supply/Demand Exception Report [11/CNR]

You use this task to produce a report of any discrepancies between supply and demand details - for example, where a [production order](#) is amended so that the quantity no longer matches the sales order. See Advanced Order Entry product guide for more details.

Chapter 6 Utilities

Mass Replace - Inputs [2/CNU]

Use this task to make sure that changes you make to operations on the model [configuration route](#) are reflected in all related [base items](#).

See the Manufacturing product guide for more details on this task.

Configurator Background Processing

Configurator uses background processing jobs for the following tasks:

- To update [production order](#) details for configured and make-to-order lines
- To allocate finished goods on [production orders](#) to any connected sales order lines, including configured lines

You must start the relevant subsystem before starting to create any orders on the system for configured or [make to order](#) products.

Subsystems are started and ended through the Subsystem Processing menu in the Generic Systems application. For further details, please refer to the Generic Systems product guide.

This replaces the following tasks:

- Start [Production Order](#) Creation
- End [Production Order](#) Creation
- Start Reservation Monitor
- End Reservation Monitor

Appendix A Glossary

This glossary provides a definition of terms used in Configurator. Some are general industry terms whilst others have a specific meaning within the context of the Configurator.

Actual Component

The configuration route often contains a generic component, which is a dummy item. The dummy item is linked to a range of real or actual components by a common search family.

You use the configuration process to select the actual component which is to replace the generic component.

Base Item

A special category of item used within Configurator to define item master details which will be used as a base for the generation of **pre-configured item** details during **pre-configuration**.

Bill of Materials

This is the definition of the inputs that are required to make a product. It is also known as a product structure, recipe or formula.

Calculated Price

This is the price calculated by Configurator, as opposed to a fixed price override, for example, in the sales order. The price itself depends on the pricing method, and can include operation costs.

Characteristic

Any of the ten possible attributes definable to a particular **search family**

Component

Any item that is used in the manufacture of another item

Configuration Route

The special route code reserved for the definition of route details for Configurator **model items** and configured items

Configurator Rule

A set of instructions for the inclusion or exclusion of operations or components on a configured route

Configurator Message

This is text indicating the existence of an error condition during configuration. This may be due to a rule or quantity range violation.

Configure to Order

This is a business environment in which features and options of a product are tailored to the exact requirements of a customer, and assembled or manufactured to meet a specific customer order. This is a particular form of **Make to order**.

Cost

This is what it costs to produce or purchase an item. Operation costs are held in Production, and are used by Configurator for pricing method 2.

Note the difference between cost and price (what the item is to be sold for).

Cost Plus

Cost plus margin pricing, or cost plus, rolls up component prices, optionally adds operation costs, and adds on a margin for the parent item. Pricing method 2 on Configurator company profile gives cost plus margin pricing.

Default Component

A component selected in route maintenance as the standard **actual component** for a particular **generic component**

Description Table

In Inventory Management, all miscellaneous codes and their associated values must be specified in the Descriptions maintenance option.

Direct Selection

A method of choosing options for a configuration by the direct selection or entry of a component item code

Discounted Unit Price

The unit price of an order line or component within a configuration, with any price discounts taken into account

Feature

An attribute of a configured product, for which alternative **options** are available during configuration

Formatted Text

Special operation text for configured items for which a formal template is specified in Production text maintenance

Generic Component

This is a dummy component entered on a configuration route to represent a feature of the configuration. The generic component is replaced by an **actual component** from the same **search family** during the process of configuration.

Inventory Source

This is a user-defined code specified in Inventory Management Descriptions file maintenance option and attached to an item in Inventory Management item maintenance. In Configurator, special Inventory Management source values are reserved for the identification of:

- [Model items](#)
- [Base items](#)

- [Pre-configured items](#)
- [Order configured items](#)
- [Generic components](#)

Make to Order

This is a business environment in which a product is assembled or manufactured to meet a specific customer order. **Configure to order** is a particular form of make to order processing.

Message Category

This is a set of **Configurator messages**. Categories are used to aid the search and selection of specific messages.

Message Severity

This specifies, for **Configurator messages**, whether the message acts as a warning which can be bypassed (a memo message) or as an error condition which must be addressed by the user (a critical message).

Model Item

This is the item code used in Configurator to define the route which contains all possible operations, standard components and generic components for a particular group of configurable products. The model item route is used as the basis for the definition of route details for individual **pre-configured items**.

The definition of a model is not necessary unless you wish to pre-configure your item.

Option

One of a set of alternative components selectable for a specific **feature** of a configuration

Order Configuration

The configuration of a product for a specific customer order line

Order Configured Item

This is when all the configuration options are selected in order entry. This kind of item has its own route attached. It is not connected to a model, and pre-configuration is not used.

Ordering Method

This is the method by which an item is sourced for supply to a customer. In Advanced Order Entry, items may be manufactured or purchased to order, in addition to being sourced from existing stock.

Parent Item

Any type of manufactured item

Phantom

Within Production, a phantom item represents a sub-assembly which is being treated as a single item for the purposes of route maintenance. For a true picture of the components used in a phantom, it must be exploded, that is, be represented in full.

Pre-configuration

This is the optional initial stage in the configuration of a product. Pre-configuration enables you to incorporate selected configuration options into an item before that item is ordered.

Pre-configured Item

A pre-configured item is created by taking the base item as a basis and then selecting certain options. You must first create a model item with an attached route, then a base item in Inventory.

Presentation Sequence

This is the order in which operations and components on a configuration route are presented to the user during the process of configuration. Significantly, this also affects the order in which Configurator rules are applied.

Price

Pricing in Configurator is controlled by the value in the pricing method field on the company profile. This can be:

- 0 - The [price](#) is taken to be the list [price](#) for the [parent item](#).
- 1 - The [price](#) is the total of all [components](#), taken from their list [prices](#).
- 2 - The [price](#) is the total of all [components](#) and ([optionally](#)) operations, plus a mark-up percentage.

Note the difference between cost (what it costs to produce or purchase an item) and price (what the item is to be sold for).

Proactive Rule

The automatic application of a **Configurator rule** during the building of a configuration

Production Order

This is a requirement to manufacture an item, detailing the operations and components to be used. It is also referred to as a **works order**. Created automatically for configured and made-to-order lines.

Production Sequence

The order in which operations and components on a Production route are to appear for processing on the **production order**

Prompted Selection

A method of choosing **options** for a configuration by the selection of particular item **characteristics**

Quantity Per

The quantity of a component that is required to make the standard lot quantity of its parent item

Reactive Rule

The identification of a **Configurator rule** violation at the review stage of configuration

Rule Action

The action to be performed when a **Configurator rule test** is satisfied

Rule Category

This is a set of **Configurator rules**. Categories are used to aid the search and selection of specific rules.

Rule Section

A particular section of a configured route to which **Configurator rules** are applied

Rule Test

A set of conditions which, when satisfied during configuration, trigger the action of a **Configurator rule**

Search Family

This is a grouping of items which share certain common attributes or **characteristics**. Search families are used in Configurator to group together related items and to search for items by the entry of characteristic values.

Unprompted Selection

A method of choosing **options** for a configuration by the entry of a set of item **characteristics**

Works Order

This is a requirement to manufacture an item, detailing the operations and components to be used. It is also referred to as a **production order**. It is created automatically for configured and made-to-order lines.