



Configurator
Training Manual

ETMCFG11

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Document Number CFGTRN

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May 2018, Release 11

This document has been prepared to conform to the current release version of TRAVERSE Accounting Business Software for Windows. Because of our extensive development efforts and our desire to further improve and enhance the product, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

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INTRODUCTION

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OVERVIEW

The **Configurator** is a flexible software tool which allows you to create unique and in-depth Bills of Material or Sales Orders based on a series of questions and answers from a prospective buyer. The Configurator guides the user through a question and answer process in a way that allows a user with limited product knowledge to configure a sophisticated product. The end result could be a Sales Order configuration consisting of multiple line Items or a single line Item that represents a Bill of Material.

Setting up the Configurator to ask questions to customize the product and adjust the pricing and/or costing as necessary is a multi-step process. There are a number of fields that determine how the price accumulates and how the Item or Job is configured. To get a better idea of how you need to set up the Configurator for an Item, lay out the questions and possible responses the system will present to the user. For each response, make note of the Items or Operations you want to use in the Sales Order or Manufacturing Order. By doing some preparatory work before you set up the Configurator, you will make the process easier. Use the Configuration Worksheet for Sales and Manufacturing Orders to help you with this process.

System Information

Additional information about using the system is in the following sources:

- The Training Manuals for other TRAVERSE applications
- The *Developer's Guide* and *Developer's Object Descriptions* manuals
- Online help

Customer Support

Open Systems Holdings Corp. has a strong commitment to customer service and product quality. If you need help using any Open Systems product, follow these procedures:

- Consult the user's guide and other TRAVERSE reference materials.
- If you are a subscriber to the TRAVERSE customer support program, you can consult your customer support representative (1-800-320-3088).

ABOUT CONFIGURATOR

Frequently Used Functions

The most frequently used functions are on the Setup and Maintenance Menu and Sales Order Transactions, MFG Bill of Material Setup and Maintenance, and MFG Production Production Orders menus. Use these functions to perform the following tasks:

- Set up the Configurator, Configuration Categories to group related configurations.
- Use the Configuration Maintenance to set up the configuration steps for use in Sales Orders and Manufacturing Orders.
- Enter Sales Orders and answer questions to configure the Items on the Sales Order.
- Enter Production Orders and answer questions to configure the Bill of Material to use for the Production Order.

Setup and Maintenance Functions

Use the Setup and Maintenance functions in the Configurator to set up Configuration Categories to group related configurations, and the Configuration Maintenance to set up the configuration of the steps used to build the Items sold in Sales Order transactions and Production Orders from MFG Production.

Sales Order Transactions

Use the Sales Order Transactions functions to test the setup of the configuration of Items to validate the setup is working correctly. The Sales Order, Transactions, Orders function is the vehicle used to generate the Items Customers want to customize.

Manufacturing BOM and Production

Use the Manufacturing Bill of Material and Production applications to view and edit the Bill of Material generated for certain type of configurations, and generate Production Orders and edit the order, if necessary, and record production on the Production Order.

Interfaces

Configurator requires you to have the Accounts Receivable and Sales Order applications. Sales Order is required as the source of the transactions used to generate the configured Items on the order.

The Manufacturing suite of applications is recommended if you require Items to be built to specific configurations using a Bill of Material and a Production Order to manufacture the Items sold on the Sales Order transactions.

SETTING UP CONFIGURATOR

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CONFIGURATOR OVERVIEW

The Configurator is a flexible software tool which allows you to create unique and in-depth Bills of Material or Sales Orders based on a series of questions and answers from a prospective buyer. The Configurator guides the user through a question and answer process in a way that allows a user with limited product knowledge configure a sophisticated product. The end result could be a Sales Order configuration consisting of multiple line Items or a single line Item that represents a Bill of Material.

Setting up the Configurator to ask questions to customize the product and adjust the pricing and/or costing as necessary is a multi-step process. There are a number of fields that determine how the price accumulates and how the Item or Job is configured. To get a better idea of how you need to set up the Configurator for an Item, lay out the questions and possible responses the system will present to the user. For each response, make note of the Items or operations you want to use in the Sales Order or Manufacturing Order. By doing some preparatory work before you set up the Configurator, you will make the process easier. Use the Configuration Worksheet for Sales and Manufacturing Orders to help you with this process.

PREPARING FOR CONFIGURATOR SETUP

Before setting up the Configurator:

- Make sure all the component Items for the Sales Order or Manufacturing Order configuration exist in Inventory.

If not, set up the Items in Inventory.

Pay special attention to the Base Price field on the Price Info tab. This is the value the configurator will use when calculating pricing based on Inventory pricing.

- Make sure all the Labor Operations necessary exist in MFG - Routing and Resources.

If not, set up the Operations you will need.

- Determine the starting price for the configuration.

If you are creating a manufacturing configuration, you can choose to start with no Base Price, use the Base Price for the Inventory Item, or enter a specific Base Price.

If you are creating a Sales Order configuration, there is no Base Price.

- Determine whether you want to add pricing determined by the questions and responses you will set up in the Configurator.

If not, you will set up a Base Price that does not change as the Item is configured.

- Create Configurator Categories to group configurations together for use in the configuration entry screens.

- Create Configurator Groups to organize your questions.

Each Configurator Group has its own set of questions.

Example: A TrimColor group could includes questions to determine what the trim color will be. Another example might be a Wiring group that includes questions about the wiring characteristics of the configuration description.

- Use the Configurator Maintenance screen to create Item configurations.

CONFIGURATION WORKSHEET

The heart of the Configurator is the Configuration Maintenance function. The Configuration Maintenance function creates a series of questions and responses that drive the Item setup. This setup function is where the real work needs to be done.

The TRAVERSE Help for the Configurator sample configuration setups follow this worksheet. Use this worksheet to plan your configuration before you enter it into the system.

Planning - Stage 1

The first step in creating a configuration is defining what you want to configure. Before making any entries into the system for your configuration, you need to plan what you want to configure, the options you will present to the user, and the pricing scheme you want to use for the configured Item.

Determine if the configured Items will be put together like a kit, as a list of Items on a Sales Order, or manufactured as a Bill of Material and assembled into a new Item.

What can the user configure?

List the parts of the configured Item the user can customize, such as size, color, and other choices that determine other options. For example; if the configured Item is a lawn mower, the user might customize the power source (gas, corded electric, cordless electric), the size of the mower deck, whether they want a bagger, or the type of blade.

- _____
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- _____
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- _____
- _____
- _____
- _____

What is included in the configured Item that the user cannot customize?

List the Items that are required to be included in the configured Item. These should be Items in which the user has no choice or option. For example; if the user chooses to configure a gas-powered lawn mower, Items that must be included might be a spark plug, gas tank, and air filter.

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- _____

Do any of the components depend on choices the Customer makes?

Often a choice a user makes determines available options further into the configuration process. For example; if a user chooses to build a gas-powered lawn mower, s/he will not be presented with questions regarding electric motors, but will be presented with questions that only apply to gas engines.

List components that are included or excluded depending on what the user chooses in a previous question.

- _____
- _____
- _____
- _____
- _____
- _____
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- _____
- _____
- _____

How do you want to price the configured Item?

The Configurator offers many options for pricing configured Items, from one blanket price to components in which the Inventory price is overridden or superseded. The available pricing options are dependent on the type of configuration you are using, whether it is a Sales Order configuration or a Manufacturing Order configuration.

- Straight Inventory pricing--the prices of the configured Items are added together for the final price
- A Base Price plus individual pricing for the configured Items (only applicable to manufacturing orders)--if your Base Price comes from the configuration, determine a default price.
- A blanket, or fixed (default), price that does not change no matter what components are selected.
- A combination of Inventory and configuration pricing, with or without formulas.

Other things to consider:

- Do you want the system to assign an Item ID for the configured Item (Auto), or do you want the Item ID to reflect some or all of the characteristics of the Item (Smart ID number)?
- Will the Description and Additional Description of the final configured Item change depending on the components the user chooses?
- Are there any restrictions determined by the components the user chooses? For example; if the user chooses a small gas engine for a lawn mower, is there a limit to the size of the mower deck allowed with that engine? List restrictions as applicable.

- _____
- _____
- _____
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- _____
- _____
- _____
- _____
- _____
- _____

Planning - Stage 2

Stage 2 planning consists of laying out the options for each Item the user is allowed to configure, as well as listing the Items that are included but not configured by the user.

List the options the user can customize and the options available. For example; if the user can choose what type of power source for a lawn mower, the available options might be gas engine, corded electric motor, or cordless electric motor.

User can customize:	Options available
Sample: Aquarium tank size	20 gal, 30 gal, 50 gal

List the Items that are required to be included in the configured Item. These should be Items in which the user has no choice or option. For example; if the user configures a lawn mower, items that must be included might be wheels, a handle, and a safety switch.

Item to configure:	This must be included
Sample: Aquarium	Gravel, aerator pump, tank thermometer
Sample: Lawnmower	Safety cutout switch, wheels, handle

List components that are included or excluded depending on what the user chooses in a previous question.

If user chooses this:	This must be included
Sample: Aquarium - Saltwater	Hydrometer
Sample: Lawnmower - gas engine	Spark plug, gas tank, air filter

List components the user can customize depending on what the user chooses in a previous question.

If user chooses this:	This can be customized
Sample: Aquarium - Saltwater	Types of saltwater fish for the aquarium
Sample: Aquarium - Freshwater	Types of freshwater fish for the aquarium
Sample: Lawnmower - gas engine	Engine size, gas tank capacity
Sample: Lawnmower cordless electric motor	Motor size, battery capacity

Setup – Inventory Items

Before you start a new configuration, make sure all the component Items that may be used in the configuration are set up as Inventory items. Verify pricing if the configuration will use Inventory pricing.

Setup – Configuration Categories

Before you start a new configuration, make sure you have created the Configuration Categories you want to use for the Configurator. Configurator Categories allow you to group the configurations you create.

SETUP AND MAINTENANCE

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OVERVIEW

Setting up the Configurator to ask questions to customize the product and adjust the pricing and/or costing as necessary is a multi-step process. There are a number of fields that determine how the price accumulates and how the Item or Job is configured. To get a better idea of how you need to set up the configurator for an Item, lay out the questions and possible answers the system will present to the user. For each answer, make note of the Items or Operations you want to use in the Sales Order or Manufacturing Order. By doing some preparatory work before you set up the configurator, you will make the process easier. See the Configuration Worksheet (page 2-7) for examples.

Once you have set up the Items you will need in Inventory and created any Operations you might need in MFG - Routings and Resources, you can start to set up configurations. Use the Configuration Categories function to create categories to group related configurations.

The pricing options available for a configuration vary depending on the type of configuration you are setting up, as well as the options you use during the set up. See Configurator Pricing for more details.

Before you start:

Because of the flexibility of the Configurator, there are a number of options you can use to create a unique configuration. Each option can affect the price and cost of the configured Item or process differently depending on the choices you make. To help you understand the options you have in setting up a configuration, we will walk through the setup process for a Sales Order configuration and a Production Order configuration. You can use the Configuration Worksheet (page 2-7) to help you with this process.

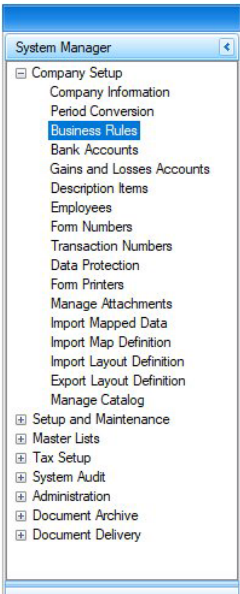
BUSINESS RULES

Use the **Business Rules** function to define application interfaces and general information about Configurator functions. You can specify if you want to allow costs to be overridden, what production order type to default, and if you want to display the costs on reports and screens.

To set up **Business Rules**, follow these steps:

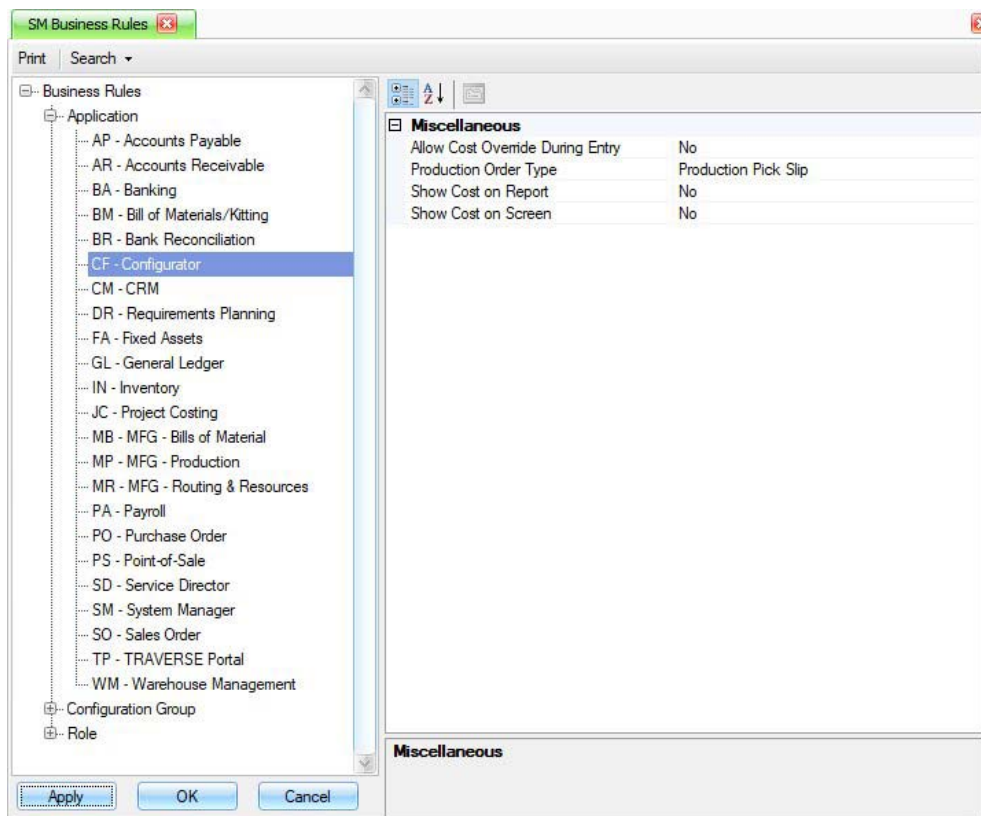
- 1. Select **Business Rules** from the **Company Setup** menu in **System Manager**.

Business Rules Menu



- The **Business Rules** screen appears.

Business Rules Screen



- Select **CF - Configurator** under the Application tree.

Miscellaneous

- Allow Cost Override During Entry:** Select **Yes** to allow the user to override costs on the Sales Order or Production Order configuration entry screen; otherwise, select **No**.
- Production Order Type:** Select **Production Pick Slip** or **Order Traveler** as the default output report you can print from the configuration entry screen when configuring a Production Order.
- Show Cost on Report:** Select **Yes** to include component costs on the output report; otherwise, select **No**.

- 7. **Show Cost on Screen:** Select **Yes** to display component costs on the configuration screen; otherwise, select **No**.
- 8. Select a command button:

Command Buttons

Name	Description
Apply	Save the changes you have made to the business rules functions. The screen will remain open.
OK	Save the changes and exit the business rules function.
Cancel	Close the business rules screen without saving any changes.
Print	Preview and print a business rules report.
Search	Perform a wildcard search of all existing business rule descriptions. The results will display in a tree-view for easy navigation.

Business Rules Report

Continental Products Unlimited			Page 1
Business Rules List			
Application	Group		
	Description	Current Value	Default Value
CF - Configurator	Miscellaneous		
	Allow Cost Override During Entry	No	No
	Production Order Type	Production Pick Slip	Production Pick Slip
	Show Cost on Report	No	No
	Show Cost on Screen	No	No

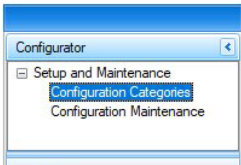
CONFIGURATION CATEGORIES

The **Configuration Categories** allow you to group the various configurations you create.

To set up **Configuration Categories**, follow these steps:

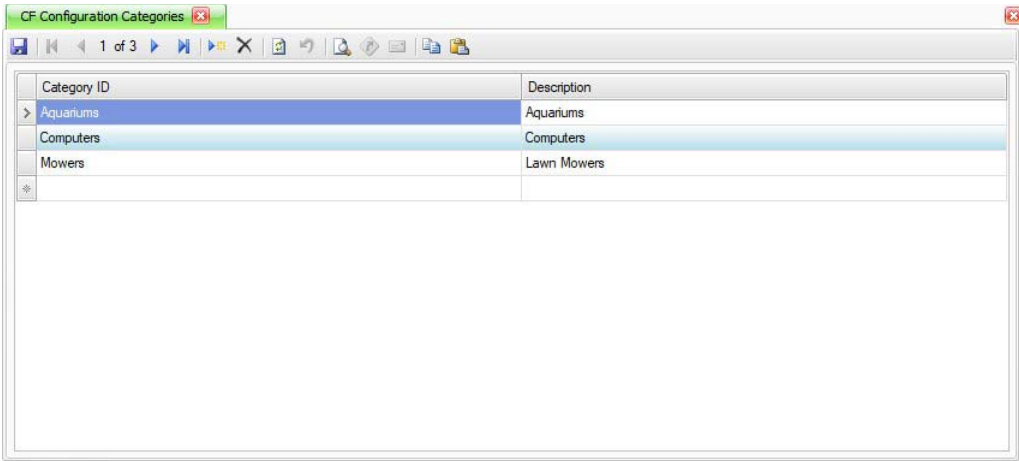
1. Select **Configuration Categories** from the **Setup and Maintenance** menu.



Configuration Categories Menu



2. The **Configuration Categories** screen appears.


Configuration Categories Screen




3. Click the **New Record** button  on the toolbar to create a new record.
4. Enter a **Category ID**. This value is limited to 10 characters.
5. Enter a **Description** for the Category ID.
6. Click the Save button .

Task Summary

To edit a Configuration Category:

1. Select and edit a **Category ID**.
2. Click the Save button .



To delete a Configuration Category:

1. Select a **Category ID**.
2. Click the Delete button . You cannot delete a Category ID that is in use.

Producing a Configuration Categories List

Use the **Configuration Categories List** function to produce a list of the Configuration Categories you defined in the Configuration Categories function on the Setup and Maintenance menu.

To produce a **Configuration Categories List**, follow these steps:

1. Select the **Print Preview** button  to preview the list of batches.
2. The **Preview Report** screen appears.
3. Select the **Print** button  in the toolbar to print your list.

NOTE: Refer to the Reporting section in the General Information guide for more details on print options and selections when previewing the report.

Transaction Batch Codes List

[illegible]

CONFIGURATION MAINTENANCE BASIC FUNCTIONALITY

Because of the flexibility of the Configurator application, there are a number of options you can use to create a unique configuration. This topic is intended to give you a basic understanding of the **Configurator Maintenance** screen and its functionality.

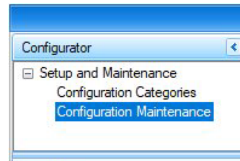
The Configurator maintenance screen has four sections: the Tree view, the General section, the Groups section, and the Tabs section.

The **Config Desc** field in the header holds the description of the configuration. This field has a 50-character limit.

To use the **Configuration Maintenance**, follow these steps:

1. Select **Configuration Maintenance** from the **Setup and Maintenance** menu.

Configuration Maintenance Menu



2. The **Configuration Maintenance** screen appears.

Configuration Maintenance Screen - Blank

CF Configuration Maintenance

Validate Variables Constraints Copy Expand

Config Desc

General

Config Type Custom Output Part Number Type

Category ID Active From/Thru Default Price

Base Item ID Config Desc Type Base Price From

Customer ID Config Item Desc Add Config Price

Allow Constraint Violations

Groups

Group ID	Tab Order	Description
*		

Record 0 of 0

Fields Field Detail List Values Actions Action Detail

Field ID	Label / Question	Group ID	Tab Order	Display When	Bu...	Required

Record 0 of 0

The tree view on the left side of the screen displays a quick overall visual of the product configuration question and response process. Click on the plus or minus symbols to expand or collapse individual branches, or use the Expand button on the toolbar to expand all branches, or the Collapse button to collapse all branches.

Configuration Maintenance Screen - Filled - Expanded

CF Configuration Maintenance

1 of 1

Validate Variables Constraints Copy Expand

Config Desc: LAWNMOWER M1

General

Config Type: Manufacturing Orders Custom Output: Part Number Type: Smart + Sequence

Category ID: Mowers Active From/Thru: 9/1/2017 12/31/2018 Default Price: 0.0000

Base Item ID: MOWER Config Desc Type: Fixed + Values Base Price From: Inventory

Customer ID: Config Item Desc: Lawn mower with deck Add Config Price: Inventory w/ Config Override

Allow Constraint Violations

Groups

Group ID	Tab Order	Description
POWER	10	Power group - Elec, Gas, Rechargeable Battery
DECK	20	Deck Width Group
ENGMT	25	Engine or Motor size
OPTNS	30	Accessories Group

Record 1 of 4

Fields

Field Detail List Values Actions Action Detail

Field ID	Label / Question	Group ID	Tab Order	Display When	Bu...	Required
POWER TYPE	Power Source	POWER	60		Build	✓

Record 1 of 1

General section

Configuration Maintenance Screen - General

The image displays two screenshots of the 'General' section of the Configuration Maintenance screen. Both screenshots show a form with various fields for configuration setup.

Top Screenshot (Manufacturing Orders):

- Config Type:** Manufacturing Orders
- Category ID:** Mowers
- Base Item ID:** MOWER
- Customer ID:** (blank)
- Custom Output:** (blank)
- Active From/Thru:** 9/1/2017 to 12/31/2018
- Config Desc Type:** Fixed + Values
- Config Item Desc:** Lawn mower with deck
- Part Number Type:** Smart + Sequence
- Default Price:** 0.0000
- Base Price From:** Inventory
- Add Config Price:** Inventory w/ Config Override
- Allow Constraint Violations:** (unchecked)

Bottom Screenshot (Sales Orders):

- Config Type:** Sales Orders
- Category ID:** Aquariums
- Base Item ID:** AQUARIUM
- Customer ID:** (blank)
- Custom Output:** (blank)
- Active From/Thru:** 9/1/2017 to 12/31/2018
- Config Desc Type:** Fixed + Values
- Config Item Desc:** Aquarium fish tank kit
- Part Number Type:** Auto
- Default Price:** 0.0000
- Base Price From:** None
- Add Config Price:** Inventory w/ Config Override
- Allow Constraint Violations:** (checked)

The **General** section sets up basic settings or “rules” that determine how the lower tabs section of the screen works.

1. The value you select in the Config Type field (Manufacturing Orders (MO) or Sales Orders (SO)) affects the way some of the configuration options function, notably the pricing options.
2. Select a **Category ID** from the drop-down list. The category may be used to create a part number.


The Inventory category field and the Configurator category field are unrelated fields.

3. Select a **Base Item ID** from the drop-down list. This field is required.

The Base Item is used as a template so the system can create the correct fields for new Inventory Items you configure. Generally, the Base Item, or template Item, will be similar to the Item being created so they can share fields such as Account Code, Serialized, Units of Measure, etc.

Example: An example of a field for an Inventory Item created from the Base Item template would be the GL Account Code. The newly-created Item will take its Account Code from the Base Item's Account Code.

4. If you are setting up a configuration unique to a specific Customer, select a **Customer ID** from the drop-down list; otherwise, leave the field blank.

5. The **Custom Output** field defines a custom “.repx” type file for output. Use the **Browse** button  for the field to select an “.repx” file or an Excel worksheet that will override the base Configurator output report.
6. If applicable, enter valid usage dates for the configuration in the **Active From/Thru** fields. Configurations outside of this range will not appear on the configuration choices when the Configure function is activated in Sales Orders.
7. The finished configuration will become a new part number. The **Configuration Description Type** field defines how the Item Description and the Additional Description lines will be determined for the new Items (Note: The term “Fixed” refers to the Item's Description field, and the term “Values” refers to the item's Additional Description field):
 - **Fixed:** If you want only the Description field populated, select “Fixed” in the **Config Desc Type** field. The Config Item Desc field value will be used as the Item's Description. If there is no value in the Config Item Desc field, the item's Description will be blank. This type will also result in a blank Additional Description field.
 - **Fixed + Values:** If you want to create an Additional Description for the Item, select “Fixed + Values” in the **Config Desc Type** field. The value in the Config Item Desc field will become the Item's Description. The questions and responses of the configuration will be placed in the item's Additional Description field.
8. The **Config Item Desc** field defines the value placed in the Item's Description field during the creation of the Sales Order, Bill of Materials, Inventory Item, and/or Production Order for a Manufacturing Configuration.
9. The **Part Number Type** field determines how a new Item number will be created. When Manufactured Items are created in Inventory and a Bill of Material is created, the options to create a new Item ID or BOM ID are:
 - **Auto:** The Auto option creates a part number based on Category, Date, and a Sequence Number. When this option is used, the Smart ID references in the configuration setup are not used.
 - **Smart:** The Smart option creates a part number based on the specific smart ID's created as part of the configuration.

The Smart Item ID is built using the Field Detail tab's Smart ID Len field to determine the length of the ID for that question. The values for the Smart Item ID is entered into the List Values tab for each of the choices to the question from the Field Detail tab, or in the Smart ID Value field on the Field Detail tab for certain Data Types.

The whole Item ID is built using the values entered for each question and List Value as each question is answered.

- **Smart + Sequence:** The Smart + Sequence option is the same as the Smart option with the addition of a four-digit Sequence Number so that similar Items could be used to create multiple Inventory IDs.
10. If base pricing is based on the Configuration rather than Inventory, the **Default Price** is the starting price of the Configuration. Additional pricing may be added to this as the configuration is processed.
 11. The **Base Price From** field is only applicable to Manufacturing configurations. The option you select determines the source of the base price:
 - **Inventory:** The starting Base Price comes from the Inventory master record for the Item, in the Base Price field on the Price Info tab.
 - **Configuration:** The starting Base Price comes from the Default Price field.
 - **None:** There is no starting Base Price.
 12. The **Add Config Price** field determines if and how additional pricing will be added to the Base Price via the configuration question and answer process you set up in the tabs section.
 - **Inventory w/ Config Override:** This option gives you the ability to add to the initial Base Price by pulling prices for Items added to the Configuration from Inventory when configuration prices have not been set up, or from configuration prices when they exist. You can also force a price of zero for certain components of the configuration.
 - **None:** This option forces the system to use Base Pricing only. This means the full and complete price will be either the Default Price or the Inventory price (Base Price field) for the Item. Items being added to the configuration would add cost only, yet still be listed as part of the SO configuration or the Bill of Materials; they would not affect the price. Sales Order configurations cannot be set to None because SO configurations have no Base Price; they are always priced by the Items in the configuration.
 13. Mark the **Allow Constraint Violations** check box to allow constraint violations to be overridden when answering questions during the order generation. Clear the check box to apply the constraint violation rules that can't be overridden.

See the Pricing topic for more information on pricing.

Groups section

Use the **Groups** section to create different groupings of questions. At least one Group is required. Each Group can focus on one aspect of the product--each Group has its own list of questions.

Example: If the product is a car, Groups might relate to exterior, interior, and power-train choices. A floral product might have groups of flowers, vases, and delivery options.

The Groups section remains the same for both the Manufacturing Orders and Sales Orders type configuration.

Configuration Maintenance Screen - Groups

Group ID	Tab Order	Description
POWER	10	Power group - Elec, Gas, Recharable Battery
DECK	20	Deck Width Group
ENGMT	25	Engine or Motor size
OPTNS	30	Accessories Group

1. Enter a **Group ID** (five-character limit) for a group in the configuration. Each group has its own list of questions.
2. The **Tab Order** determines the sequence in which the groups of questions are presented to the user. You can change the sequence if necessary by changing the Tab Order number.
3. Enter a **Description** of the group.

Tabs section

The tabs section defines the question and response flow, the costing, pricing, quantity determination, etc. This is where you set the details about how the Configurator works.

Fields tab

The **Fields** tab is where you define the questions that will be presented to the user in the Configurator. Questions are associated to a Group ID from the Groups section.

Configuration Maintenance Screen - Fields Tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input type="checkbox"/>
LRG WHEELS	Do you want 12" rear wheels?	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery E...	Build	<input checked="" type="checkbox"/>
BAT CHRГ	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery E...	Build	<input checked="" type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded E...	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery E...	Build	<input checked="" type="checkbox"/>

Record 1 of 6

NOTE: Notice as each group is selected in the Groups section, the list of Fields changes.

1. Enter a shorter name or ID for the question being asked in the **Field ID** field. It is not the actual question. This field is limited to 50 characters.
2. Enter the actual text for the question or label in the **Label/Question** field. This is the text that will appear in the configuration process.
3. The **Tab Order** determines the sequence in which the questions are presented to the user. You can change the sequence if necessary by changing the Tab Order number.
4. The **Display When** field is optional, but this is where you can use logic to determine whether the question or label should appear.

Example: If you set the Display When to [POWER TYPE] ='Battery Electric', the **BAT MOTOR SIZE** field label/question will only display if the power type is set to 'Battery Electric'.

5. If you want to set up logic in the Display When field, use the **Build** button to open a dialog box where you can build the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

Configuration Maintenance Screen - Fields Tab - Build

Build

Accept Reset

And

[POWER TYPE] Equals Battery Electric

[POWER TYPE] = 'Battery Electric'

Once you have entered your logic statement click **Accept** to save the Build statement.

6. Mark the **Required** check box if a response to the question being asked is required.

Field Detail tab

The **Field Detail** tab gives more detail about the specific Field ID set up on the Fields tab. The record you see in the Field Detail tab relates to the record you selected on the Fields tab.

Configuration Maintenance Screen - Field Detail Tab

Fields Field Detail List Values Actions Action Detail

Field ID: XTRA BAT

Group / Order: OPTNS 20

Label: Do you want extra batteries?

Line Type: Action Allow Qty's: ☒ Multiple Selections: ☐ Limit To List: ☒

Data Type: List

Text Length:

Display When: [POWER TYPE] = 'Battery Electric'

Help Text:

Precision: 0 Min Value: 0 Max Value: 0 Increment:

Numeric Warn: ☐ Print Group:

Default Value:

Use Field Price: ☐ Field Price: 0.0000 Price Option: Fixed Price

Required: ☒ Long Descr:

Smart ID Len: Smart ID Value:

Build

1. The **Field ID** is the same field you selected on the Fields tab. Changing the field on the Field Detail tab changes the selected ID on the Field tab as well.

2. The **Group** field refers to the Group to which the field is assigned. If necessary, you can change the Group.
3. The **Order** field shows the sequence number for the field or question in the prompt(s) for a given Group. Changing the sequence number on the Field Detail tab changes the Tab Order on the Field tab as well.
4. The **Label** is the text which will appear on the configuration screen, often in the form of a question. Changing the text in the field on the Field Detail tab changes it on the Field tab as well.
5. Select a **Line Type** for the choice the user will make. The options depend on whether you are setting up a Sales Order configuration (Information or Inventory), or a Manufacturing Order (Information or Action), or Inspection configuration (Information or Action). If the user will select from a list, the line type determines the options available on the Actions and Action Detail tab.

- **Information:** An Information list is a free form list usually not linked to actual Inventory Items via the two Action tabs. (Sales Orders, Manufacturing Orders, and Inspection)
- **Inventory:** An Inventory list contains the actual names of the Inventory products; the user selects the actual Inventory Item or Items to be used, therefore actions are not required. (Sales Orders)
- **Action:** When using an Action line type for a list, the Option Price in the List Values tab overrides the Actions and Action Detail tabs and/or the base Inventory price of all linked actions, if applicable. See Configurator Pricing for more details.

When Action and List Data Types are selected, you will use both the List Values and Actions tabs to bring in Inventory Items. The List Values will be free form text.

6. The **Data Type** option you select, along with the Line Type, determines what type of question the user will be asked.
 - **Text:** Use Text when the user input needs to be free form in nature. The type of input is more of an information-only field. Use Text when you are not looking for a specific user response.
 - **Yes/No:** Use Yes/No when the user question is of a Yes or No nature. This answer can then be linked to one or more Inventory Items or other Activity such as freight or manufacturing process costs. A **Default Value** of **Yes** or **No** should be preassigned to this question. On the Action tabs, you will be able to dictate what should happen depending on the user's response.

- **Numeric:** Use Numeric when you are looking for variable quantitative information from the user relating to one aspect of the finished product. This option forces the user to enter a numeric response to a question. A default numeric response can be preassigned. Other fields on this tab will allow the response to be further defined and/or restricted.
- **List:** Use List to create a list of specific choices that will be presented to the user. These values are defined on the List Values tab.

The option you selected in the Line Type field will determine whether this list is a free form list or an actual Inventory Item list.

If you use an actual Inventory Item list, you do not need to set up Inventory Items in the Action tabs because the user can select the Item directly.

If you chose an Information Line Type, the list is specific user-defined choices, not Inventory Items. Then, on the Action tabs, these choices can be used to select specific actions such as pulling an Inventory Item, adding a Freight charge, displaying a message, etc.

7. If you chose Text as the data type, enter the maximum length of the text in the **Text Length** field.
8. The **Display When** field is the same field that appears on the Fields tab. You can maintain the field here or on the Field tab.
9. If you want to set up logic in the Display When field, use the **Build** button to open a dialog box where you can build or edit the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See number 5 in the Fields tab instructions above.
10. Enter any **Help Text** to aid the user in answering the prompt.
11. If the Data Type is List, and you want the user to be able to enter a quantity greater than 1, mark the **Allow Qty's** check box.
12. If the Data Type is List, and you want the user to be able to select more than one Item in the list, mark the **Multiple Selections** check box.
13. If the Data Type is List, and you want to allow the user to enter options that are not included in the list, clear the **Limit to List** check box.

Example: The list options are Red, Blue, and Green. If you clear the Limit to List check box, and the user wants to choose Black (which is not in the list), the user can add that option to the list.

If the Limit to List check box is marked, the user is restricted to choosing an option included on the list.

14. If the Data Type is Numeric, enter the decimal places in the user response in the **Precision** field. Set the Precision field to Blank or 0 to use no precision (accept data as-is).
15. If the Data Type is Numeric, enter the minimum numeric value allowed for a response in the **Min Value** field. Set the Min Value field to Blank or 0 to use no minimum value.
16. If the Data Type is Numeric, enter the maximum numeric value allowed for a response in the **Max Value** field. Set the Max Value field to Blank or 0 to use no maximum value.
17. If the Data Type is Numeric, enter the minimum numeric increment allowed for a response in the **Increment** field. This field controls increments available for this field.

Example: If the Min Value is 2, the Max Value is 12, and the Increment is set to 2, valid responses would be: 2, 4, 6, 8, 10, or 12; 3 would not be valid.

The default increment is 1.

18. If the Data Type is Numeric, you can control whether a numeric value entered outside of the min/max range is allowed with a warning or not allowed at all. Mark the **Numeric Warn** check box to allow entry of a value outside the min/max range with a warning, or clear the check box to restrict entry to values within the min/max range.
19. Use the **Print Group** field to give the field a unique "Print Group" name. This means that when you are printing documents during the configuration process, the user can select which Print Group(s) to print.

Example: You could create Print Group A and Print Group B. When the user prints the documents, s/he could choose to print only group B.

Leave the field blank to always print the group.

20. Set a **Default Value** for the field, if applicable. The default value is shown to the user during the configuration process.

This field is not available when the Data Type is List.

21. If the Data Type is Numeric, and you are creating a Manufacturing Order or Inspection configuration, mark the **Use Field Price** check box to set up additional pricing considerations. See Configurator Pricing for more details.
22. If the Use Field Price check box is marked, the **Field Price** field represents the Base Price for the field (added charge). This added charge would not be an Inventory Item, Labor, or Freight charges.
23. Use the **Price Option** field to determine how the Field Price is manipulated by the user response to the question. The value the user enters can be added to, subtracted from, or multiplied by the Field Price.

Example: If the Field Price is a special handling charge, you can add/multiply/subtract it to/by/from the user's input.

- **Fixed:** The Field Price will be added to this line for any value entered by the user.
 - **Price + Value:** A price will be added to the line based on the Field Price plus the Value entered by the user to answer the question.
 - **Price - Value:** A price will be added to the line based on the Field Price minus the Value entered by the user.
 - **Price * Value:** A price will be added to the line based on the Field Price multiplied by the Value entered by the user.
24. If the user must answer this question, mark the **Required** check box. This field is read only on this tab, and is controlled on the Fields tab.
25. If available, use the **Picture** button to open a dialog box that will allow you to paste or browse to an image. The user will see the image during the configuration. The image is saved to the database in the PictureID field of the Configurator Fields table.
26. Use the **Media** button to open a window that will allow you to set up a list of different documents related to this field. These might be in addition to the picture set up with the Picture button. The user will see the links during the configuration via a Media button.
27. Enter a longer description of the configuration question in the **Long Descr** field. This will appear during the configuration process.
28. If you selected a Part Number Type of Smart or Smart + Sequence in the General section of the screen, you can set the length of this field's part of the generated Item number in the **Smart ID Len** field. Enter a length, or set the field to zero to omit this field from the Smart ID creation algorithm.
29. If you selected a Part Number Type of Smart or Smart + Sequence in the General section of the screen, you can set the value of this field's part of the generated Item number in the Smart ID Value field. Enter text for this field to include in the generated part number. This text cannot be changed by the user; it is a part of the overall Smart ID.

This field is only available when the Yes/No Data Type is selected.

List Values tab

The **List Values** tab is only active if you have selected to use a List Data Type in the Field Detail tab. The values shown in the List Values tab relate specifically to the field value you selected in the Fields tab. The List Values tab allows you to set up a list of options for the field, along with giving you the ability to adjust pricing for each option in the list. See Configurator Pricing for more details.

The additional parameters available on the List Values tab are dependent on the Line Type you chose in the Field Detail tab.

Configuration Maintenance Screen - List Values Tab

The screenshot shows the 'List Values' tab in the Configuration Maintenance screen. The 'Option List' on the left includes '40 V Battery', '60 V Battery', and '80 V Battery'. The 'Item ID' field is empty. The 'Use Option Price' checkbox is checked. The 'Option Price' is 0.0000. The 'Location ID' is empty. The 'Unit' is 'Media'. The 'Quantity' is empty. The 'Smart ID Value' is empty. The 'Long Description' is empty. The 'Option Picture' section shows 'No image data'.

List Values with Line Type = Information

The screenshot shows the 'List Values' tab in the Configuration Maintenance screen. The 'Option List' on the left includes 'Gas', 'Battery Electric', and 'Corded Electric'. The 'Item ID' field is empty. The 'Use Option Price' checkbox is checked. The 'Option Price' is 0.0000. The 'Location ID' is empty. The 'Unit' is 'Media'. The 'Quantity' is empty. The 'Smart ID Value' is 'GS'. The 'Long Description' is empty. The 'Option Picture' section shows 'No image data'.

List Values with Line Type = Inventory

The screenshot shows the 'List Values' tab in the Configuration Maintenance screen. The 'Option List' on the left includes '100W Aquarium Heater', '150W Aquarium Heater', '200W Aquarium Heater', and '50W Aquarium Heater'. The 'Item ID' is 'AQU100WHEAT'. The 'Use Option Price' checkbox is checked. The 'Option Price' is 0.0000. The 'Location ID' is 'MN0001'. The 'Unit' is 'EA'. The 'Quantity' is 1.0000. The 'Smart ID Value' is empty. The 'Long Description' is empty. The 'Option Picture' section shows 'No image data'.

List Values with Line Type = Action

1. The **Option List** is the list of responses from which the user can select. Depending on whether the Line Type is Information, Action, or Inventory, the list is made up of text field choices or legitimate Inventory Items.
 - In the case of an **Inventory** list, pricing is set in this tab only.
 - In the case of non-inventory (**Action** and **Information**) lists, pricing may be set in the Action Detail tab.

NOTE: In the case of Inventory Items, the Description, not the Item ID, appears on this drop-down list.

2. The **Item ID** field displays the Inventory Item ID of the Item selected in the Option List. This field is only valid when using a list with an Inventory line type.
3. Mark the **Use Option Price** check box, when available, to override the current Inventory pricing for the option.
4. If the Use Option Price check box is marked, enter the price to use for this item in the **Option Price** field. This price overrides any Inventory price for this Item.

Sales Orders configurations work differently than Manufacturing Orders configurations. See Configurator Pricing for more details.

- For a Sales Orders configuration, this price is the price for this Inventory Item only. Additional actions linked to this Item on the list via the Value column (on the Actions tab) ARE individually priced in addition to Items on the list.

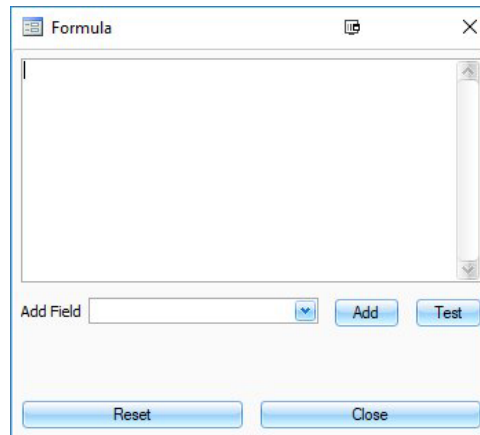
NOTE: It is not necessary to create an action Item for an Inventory Item ID in the list when the Line Type = Inventory.

- For a Manufactured Orders Item or Inspection, this price is the total price for all linked actions, thus if there are actions that are linked to this Item on the list via the Value column (on the Actions tab), those items are not individually priced. This also applies to actions with a Value of Any Value.
5. If you prefer to use a formula for pricing, mark the **Formula** check box to enable the Formula button.
 6. If you marked the Formula check box, click on the **Formula** button to open the Formula window.

When the formula work area opens, use the **Add Field** drop-down list to select the predefined fields to use in your formula. Fields with the Field Detail, Data Type of Yes/No will show in the drop-down list. When complete, click on the **Test** button to test the formula. The system will tell you if the formula is valid or not.

NOTE: The system does not know if the formula is technically correct.

Configuration Maintenance Screen - List Values Formula



7. If you are using an Inventory list, accept or edit the Item's **Location ID**.
8. If you are using an Inventory list, accept or edit the Item's **Unit** of measure.
9. Use the **Media** button to open a window that will allow you to set up a list of different documents related to this option.

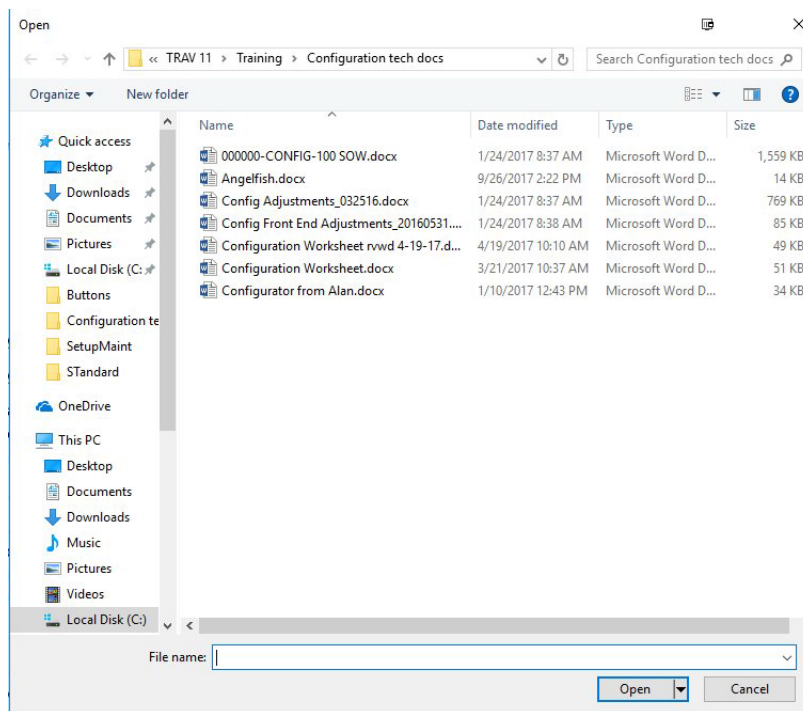
Configuration Maintenance - Media

Media for Configuration Field Value: Freshwater Angel Fish

Media Code	Sequence	Notes	Link		
Angelfish	10	Spec doc for Angelfish	C:\Documents\TRAV 11\Training\Config...	Browse	View

Record 1 of 1

Configuration Maintenance - Media - Browse



Browse and **View** buttons are available for the user to find and preview their selection.

10. If you are using an Inventory list, enter the **Quantity** of the Item.
11. If you selected a Part Number Type of Smart or Smart + Sequence in the General section of the screen, you can set the value of this option's segment of the generated Item number in the **Smart ID Value** field. Enter text for this field to include in the generated Item number. This text cannot be changed by the user; it is a part of the overall Smart ID.
12. Enter a longer description of the selection in the **Long Description** field.

13. If you are using an Inventory list, mark the **Use Item Picture** check box to use the inventory picture for the option Item.
14. Right-click in the **Option Picture** field to Load a picture file for this option, and Browse to the location of the picture file.

Actions tab

The **Actions** tab creates a list of actions to be performed at this point in the configuration. These actions could be adding another component to a Manufacturing Bill of Material configuration, displaying a Message to the user, or adding Labor or Freight. The Actions tab ties back to the contents of the Fields tab; each Item listed on the Fields tab could have one or more related lines on the Actions tab.

Generally, actions are based on meeting some condition, but a condition is not required. The Actions tab can have actions that always take place regardless of conditions or never take place. These conditions are defined in the tab's Value column, and state under what circumstance the line is valid. When the tab's Value column criteria is met, an action of some nature will take place. The contents of the Actions tab do not necessarily tie back to the values on the List Values tab.

Configuration Maintenance - Action Tab

Fields Field Detail List Values Actions Action Detail					
Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	40 V Battery	Add Material	GW40BAT	
With Value	20	60 V Battery	Add Material	GW60BAT	
With Value	30	80 V Battery	Add Material	GW80BAT	

Record 1 of 3

Add actions using the **Append** button ().

1. The **Event** column can be set to **With Value**, **Before Field**, or **After Field**. By default the event is set to With Value.
 - **With Value** will perform an action depending on the value of the field currently selected on the Fields tab. The **Action Type** column determines the action that occurs.

- If you select **Before Field** or **After Field**, the action will occur in sequence just before or just after the currently-selected field (on the Fields tab) Question/Label is presented to the user.
2. The **Sequence** number is the order in which the events are processed. To change the order of events, edit the Sequence number.
 3. If you want the action to take place when the field (on the Fields tab) is a certain value, select that value from the drop-down list in the **Value** column. Select the **Any Value** option if you want the action to take place no matter what the Field Value is.
 4. Select the type of action to take in the **Action Type** column:
 - **Add Material** allows you to add a component to the order configuration. The Action will be an Inventory Item to select.
 - **Add Labor** allows you to add an Operation and all of its related data to an order.
 - **Add Freight** allows you to add a freight charge to the order.
 - **Add Text Line** allows you to add a description line to a Sales Order or a text line to a Service Inspection.
 - **Display Message** will display a message to the user during Configuration entry.
 - **Update Field** will update a Variable field.
 - **Go To Field** will take the user directly to a particular field, skipping irrelevant areas of the configuration.
 5. In the **Action** column:
 - If **Action Type** is:
 - **Add Material** - Select the Item ID of a component to add to the order configuration.
 - **Add Labor** - Select the Operation or labor code to add to the order configuration.
 - **Add Freight** - The freight amount will come from the Option Price field or the Field Price field, depending on the field's Data Type.
 - **Add Text Line** - See Step 6
 - **Display Message** - See Step 6
 - In the **Action** column:

- **Update Field** - Choose the option to add or subtract the value or quantity entered by the user to the Variable you specify in the Action Detail tab, increase/decrease the variable by 1, or choose the option Set To (does not have to be numeric) to allow the user to set a variable to a specific value or to the value of another variable.
- **Go To Field** - Select the next field to present to the user.

6. If the Action Type is Add Text Line or Display Message, enter the text or message to add or display in the **Message/Text** Line column.

Action Detail tab

The **Action Detail** tab is a detailed extension of the Actions tab. Every entry on the Actions tab will have one linked entry on the Action Detail tab, which shows all the fields related to this action choice. Below are the various formats the Action Detail tab can take depending on the Action Type and Action:

Action = Add Material (Manufacturing Orders)

Fields	Field Detail	List Values	Actions	Action Detail
Component ID	GW40BAT			Use Override Price <input type="checkbox"/>
Location ID	MN0001			Override Price 0.0000 <input type="button" value="Formula"/>
Detail Type	Material			Quantity 1.0000 <input type="button" value="Formula"/>
BOM Rev No				Scrap Percent 0.00 <input type="button" value="Formula"/>
Usage Type	Per Assembly			Unit EA <input type="button" value="Formula"/>
Cost Group	Matl			Unit Cost 35.9900
Media Group				Total Qty 1.0000
				Total Cost 35.9900
				Notes

Item detail information appears for the item you selected in the Action field in the Actions tab.

1. Accept or edit the **Location ID** for the item.
2. Select the **Detail Type** of the item: **Material**, **Non-Stock Subassembly**, **Stocked Assembly**, or **By-Product**. See the Manufacturing Bill of Material training manual for details on these types.
3. Select a **BOM Rev No**, if applicable.
4. In the **Usage Type** field, there are 3 options, select the appropriate option:
 - **Per Assembly**: The configuration will consume a quantity of the Item for each assembly built.

- **Fixed Qty:** The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
- **As Needed:** The configuration will consume the Item as necessary for the assemblies built.

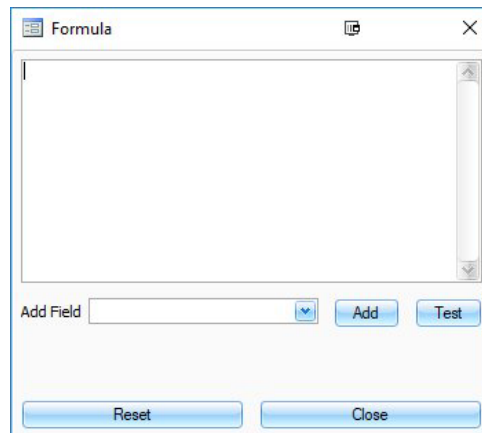
- Maint
- Maint
5. Select the **Cost Group** for the Item. Double-click on the blue link in the field to open the Cost Groups maintenance screen.
 6. Select a **Media Group** for the item, as applicable.
 7. If you want to override the Inventory pricing for the Item, mark the **Use Override Price** check box. Enter the price you want to apply to the Item in the **Override Price** field.

If you want to price the item via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

When the formula work area opens, use the **Add Field** drop-down list to select the predefined fields to use in your formula. Fields with the Field Detail, Data Type of Yes/No will show in the drop-down list. When complete, click on the **Test** button to test the formula. The system will tell you if the formula is valid or not.

NOTE: The system does not know if the formula is technically correct.

Configuration Maintenance Screen - Formula



8. Accept or edit the **Quantity** of the item.

If you want to calculate the quantity of the Item via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window. See 7 above for details on the Formula screen.

9. Enter the **Scrap Percent** for the Item, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Enter any **Notes** for the Item.

Action = Add Material (Sales Orders)

The screenshot displays the 'Action Detail' tab within a software interface. The tab contains several input fields and checkboxes. On the left, there is a list of fields: Component ID, Location ID, Quantity, Unit, Unit Cost, Total Qty, and Total Cost. Each field has a corresponding value displayed next to it. On the right, there are checkboxes for 'Use Override Price' and 'Formula'. The 'Use Override Price' checkbox is checked, and the 'Override Price' field contains the value 3.2900. Below these, there is a 'Notes' text area and a 'Formula' button.

Item detail information appears for the item you selected in the Action field in the Actions tab.

1. Accept or edit the **Location ID** for the Item.
2. Edit the **Quantity** of the Item to add to the order, if necessary.
3. Accept or edit the **Unit** of measure for the Item.
4. Enter any **Notes** for the Item.
5. If you want to override the inventory pricing for the Item, mark the **Use Override Price** check box. Enter the price you want to apply to the Item in the **Override Price** field.

If you want to price the item via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

When the formula work area opens, use the **Add Field** drop-down list to select the predefined fields to use in your formula. Fields with the Field Detail, Data Type of Yes/No will show in the drop-down list. When complete, click on the **Test** button to test the formula. The system will tell you if the formula is valid or not.

NOTE: The system does not know if the formula is technically correct.

Configuration Maintenance Screen - Formula

The screenshot shows a window titled "Formula" with a large text area for entering a formula. Below the text area is an "Add Field" button with a dropdown arrow. To the right of the "Add Field" button are "Add" and "Test" buttons. At the bottom of the window are "Reset" and "Close" buttons.

Action = Add Labor (Manufacturing Orders)

The screenshot shows the Configuration Maintenance screen with the "Action" tab selected. The "Operation ID" field is set to "ASSEMBLY7". The "Queue Time" field is set to "0.000" with a unit of "Hours". The "Mach Setup" field is set to "0.000" with a unit of "Hours". The "Mach Run Time" field is set to "0.000" with a unit of "Hours". The "Labor Setup" field is set to "15.000" with a unit of "Minutes". The "Labor Run Time" field is set to "10.000" with a unit of "Hours". The "Wait Time" field is set to "0.000" with a unit of "Hours". The "Move Time" field is set to "0.000" with a unit of "Hours". The "Price" field is set to "0.0000". The "Operation Type" is set to "Per Unit". The "Vendor ID" field is empty. The "Sub Unit Cost" field is set to "0.0000". The "Notes" field is empty. The "Formula" button is visible next to the "Mach Setup", "Mach Run Time", "Labor Setup", "Labor Run Time", "Wait Time", "Move Time", and "Price" fields.

Operation information appears for the Operation you selected in the Action field in the Actions tab.

1. Accept or edit the **Work Center ID** for the Operation.
2. Accept or edit the **Labor Type ID** for the Operation.
3. Accept or edit the **Machine Group ID** for the Operation.
4. Select the **Operation Type** for the operation: **Per Unit**, **Subcontract**, **Batch**, or **Run Rate**. See the Manufacturing Routing and Resources training manual for details on these types.
5. Accept or edit the **Queue Time** and associated **Units** of measure for the Operation.

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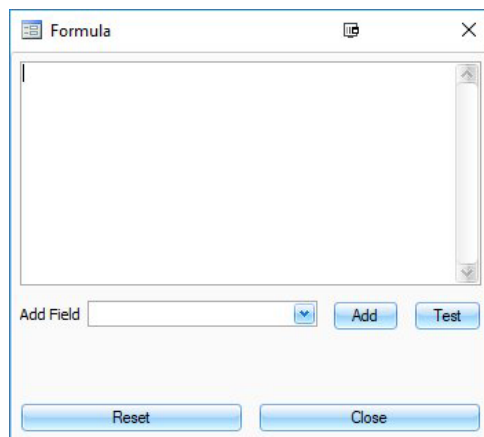
6. Accept or edit the **Mach Setup** time and associated **Units** of measure for the Operation.

If you want to calculate the Machine Setup time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

When the formula work area opens, use the **Add Field** drop-down list to select the predefined fields to use in your formula. Fields with the Field Detail, Data Type of Yes/No will show in the drop-down list. When complete, click on the **Test** button to test the formula. The system will tell you if the formula is valid or not.

NOTE: The system does not know if the formula is technically correct.

Configuration Maintenance Screen - Formula

The screenshot shows a window titled "Formula" with a standard Windows-style title bar (minimize, maximize, close buttons). The main area of the window is a large, empty text box for entering a formula. Below the text box, there is a section labeled "Add Field" followed by a dropdown menu. To the right of the dropdown are two buttons: "Add" and "Test". At the bottom of the window, there are two more buttons: "Reset" and "Close".

7. Accept or edit the **Mach Run Time** and associated **Units** of measure for the Operation.

If you want to calculate the Machine Run Time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window. See 6 above for details on the Formula window.

8. Accept or edit the **Labor Setup** time and associated **Units** of measure for the Operation.

If you want to calculate the Labor Setup time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window. See 6 above for details on the Formula window.

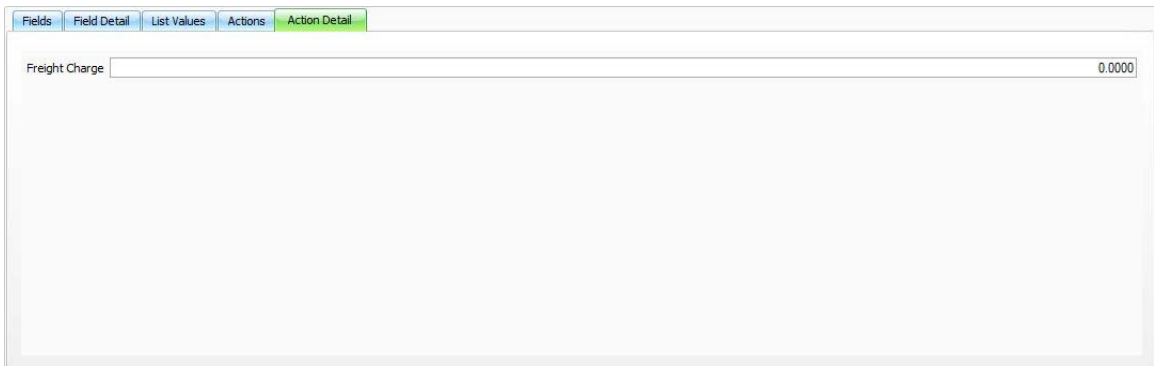
9. Accept or edit the **Labor Run Time** and associated **Units** of measure for the Operation.

If you want to calculate the Labor Run Time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window. See 6 above for details on the Formula window.

10. Accept or edit the **Wait Time** and associated **Units** of measure for the Operation.
11. Accept or edit the **Move Time** and associated **Units** of measure for the Operation.
12. Enter any **Notes** for the Item.
13. Accept or edit the **Price** for the Operation, as applicable.

If you want to calculate the price via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window. See 6 above for details on the Formula window.

Action = Add Freight

The screenshot shows a software window with five tabs: 'Fields', 'Field Detail', 'List Values', 'Actions', and 'Action Detail'. The 'Action Detail' tab is selected and highlighted in green. Below the tabs, there is a large text area. At the top left of this area, the text 'Freight Charge' is displayed next to a text input field. To the right of the input field, the value '0.0000' is displayed. The rest of the text area is empty.

Enter the **Freight Charge** amount to add to the configuration order generated.

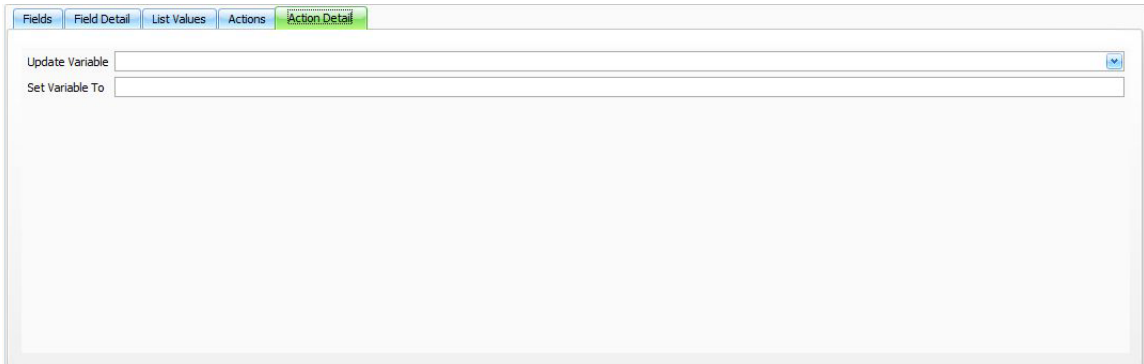
Action = Add Text Line

The Action Detail tab is blank.

Action = Display Message

The Action Detail tab is blank.

Action = Update Field, Set To



The screenshot shows a software interface with a tabbed menu at the top containing 'Fields', 'Field Detail', 'List Values', 'Actions', and 'Action Detail'. The 'Action Detail' tab is selected and highlighted in green. Below the tabs, there are two input fields: 'Update Variable' and 'Set Variable To'. Both fields are currently empty. The 'Update Variable' field has a small blue arrow icon on its right side, indicating it is a drop-down menu. The rest of the tab area is a large, empty white space.

1. Select the configuration variable you want to update from the **Update Variable** drop-down list.
2. Enter the value to which you want to change the variable in the **Set Variable To** field.

Action = Go To Field

The Action Detail tab is blank.



Command Buttons on the toolbar:

Name	Description
Validate	Validate all of the configuration setup and will display a series of error messages for the more common issues it encounters.
Variables	Open the Variables for Configuration window to set up variables.
Constraints	Open the Constraints for Configuration window to set up constraints.
Copy	Copy configuration information from an existing configuration description.
Expand/Collapse	Expand or collapse the branches in the tree view.

Variables

Variables can be used to manage custom fields during the configuration entry process. These custom fields can then be used in the options. To update the variable fields, choose the Update Field option for the Action Type on the Actions tab.

Variables for Configuration Screen

Variable Code	Description	Variable Type	Text Length
DATETEST	Enter Date	Date	
VARIABLE-TEXT	Gas or Electric	Text	10
YESORNO	Enter Yes or No	Yes/No	10

1. Enter a **Variable Code** to identify the variable.
2. Enter a **Description** of the variable. The description can be up to 50 characters long.
3. Select a **Variable Type**: **Text**, **Numeric**, **Yes/No**, or **Date**.

4. If the variable type is **Text**, enter the length of the text in the **Text Length** field.
5. Close the Variables for Configuration window to save the variables and return to the Configuration Maintenance screen.

Constraints

Constraints prevent the user from creating a configuration that is not available, or ensure that if the user creates a configuration, requirements are met, such as limiting the number of fish in a tank depending on the size of the tank, forcing a certain shipping method if the configured product is beyond a particular weight or size. You can also use constraints to change information based on situations that indicate something is awry.

Constraints for Configuration Screen

Sequence	Category	Description	When Condition
10	10FishLimit	Message for fish limit for 10 gal	[FishQty] >= 10 And [TANKSZ] = '10 G...
20	20FishLimit	Message for fish limit for 20 gal	[FishQty] >= 20 And [TANKSZ] = '20 G...
30	29FishLimit	Message for fish limit for 29 gal	[FishQty] >= 29 And [TANKSZ] = '29 G...
40	40FishLimit	Message for fish limit for 40 gal	[FishQty] >= 40 And [TANKSZ] = '40 G...

When Condition: [FishQty] >= 10 And [TANKSZ] = '10 Gallon Hooded Aquarium'


Type: Message

What: [Empty field]

Message Text: The suggested limit is 10 fish.

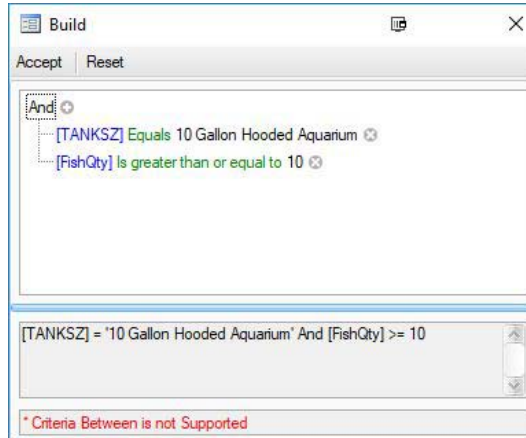
Active From: [Empty field] Thru: [Empty field]

To create a Constraint:

1. Click the **Append** button  to create a blank record.
2. The **Sequence** number is generated by the system, and determines the order in which constraints are applied. You can change the sequence number to change the order.
3. Enter a **Category** for the constraint. This is a free-form text entry, and not related to the configuration categories.
4. Enter a **Description** for the constraint.

5. Build a **When Condition** by clicking the **Build** button to open a dialog box where you can build or edit the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. Create a condition to test against. This condition determines whether the value the user enters is allowed or not.

Constraints Build Screen



6. Select the **Type** of constraint you want to build:
 - **Message:** Presents a warning message to the user.
 - **Require:** Will not let the user continue with existing selections unless the requirement is met.
 - **Remove:** Will not let the user continue with existing selections unless the entry affecting the condition is removed.
7. Use the **Build** button for the **What** field to create an action for the constraint to take when the condition is affected.
8. Enter **Message Text** to display to the user when the constraint is affected.
9. If applicable, select the date range during which the constraint will be active in the **Active From** and **Thru** fields.
10. Close the Constraints window to save the constraints and return to the Configuration Maintenance screen.

CONFIGURATOR PRICING

Pricing is very flexible in the Configuration package. Keep in mind as you create your Configurations, that Sales Order configurations work differently than Manufacturing Order configurations, so the initial selection of Sales Order vs. Manufacturing Orders dictates many of the pricing options.

Before creating the more detailed elements of your configuration, you will first want to set two parameters for your Manufacturing Orders type configurations: **Base Price From** and **Add Config Price**. These two fields are defaulted for Sales Order configurations and cannot be changed.

NOTE: Pricing is directly affected by the Sales Order Pricing setup using the Customer Levels, Customer Pricing, Price Structures, and Promotional Pricing. Selections made in the Customer setup as well as the Bill To Customer selected will affect the price calculated.

In the Configuration Maintenance function:

The following topics address only the available fields that may affect the pricing of the configuration.

Sales Configuration

General Section

Field	Definition	Values	Effect
Default Price	The starting price of the configuration if base pricing is based on the configuration rather than Inventory. Additional pricing may be added to this as the configuration is processed.		Not applicable to Sales Order configurations.
Base Price From	Value selected indicates whether a starting Base Price comes from the Base Price field of the Item's IN master record, or from the Default Price field, or no base starting price. Additional pricing may increase this Base Price as the configuration process is used.	None Sales Config Default (not available to change)	Configurations will start with no Base Price.
Add Config Price	Determines how and if additional pricing will be added to the Base Price via the configuration question and answer process set up in the tabs section.	Inv. w/ Config Override Sales Config Default (not available to change)	This will add prices based on Item pricing found in Inventory unless there is a value associated with configuration fields, which appear as prices and formulas on the Field Detail, List Values, and Action Detail tabs. These fields will override (take the place of) Inventory pricing if used.

Field Detail tab

Field	Definition	Values	Effect
Data Type	Determines the type of question presented to the user.	Text	Use when the input needs to be free text in nature, that is, when you are not looking for a specific user response.
		Numeric	Forces the user to enter a numeric response to a question. Use this when you are looking for quantity-type information from the user.
		Yes/No	Use when the question requires a Yes or No answer. The answer can then be linked to Inventory Item(s) or other activity such as Freight or Manufacturing process costs. A default Yes or No should be preassigned.
Use Field Price	Allows user to set up additional pricing considerations.	List	Create a list of specific choices to present to the user. These values are set up on the List Values tab. The choices are then used to select specific Inventory Items or actions such as adding a freight charge, pulling an Inventory Item, or displaying a message.
		Unchecked (not available to change)	When checked, and with a Numeric data type, allows you to set up additional pricing considerations.

Field	Definition	Values	Effect
Field Price	If the Use Price Option is checked, this represents the Base Price for the added charge, not Inventory Item, Labor, or Freight charges.		If the Use Price Option is checked, this is the Base Price for this added charge. This does not represent Inventory Item, Labor, or Freight charges.
Price Option	Allows the user to manipulate the value in the Field Price field, and determines how the user can manipulate the value. Active only when the Use Price Option field is Checked.	Fixed Price (not available to change)	When the user enters a numeric value, that value replaces the value in the Field Price field.
		Price + Value	When user enters a numeric value, that value is added to the value in the Field Price field.
		Price - Value	When user enters a numeric value, that value is subtracted from the value in the Field Price field.
		Price * Value	When user enters a numeric value, the value in the Field Price field is multiplied by that value.

List Values tab (only active with Line Type = List)

Field	Definition	Values	Effect
Use Option Price	Allows override of the current Inventory pricing scheme with a specific price per unit for this Item. Active only when Line Type is Inventory (Sales).	Checked	When checked, utilizes the value in the Option Price field to override the current Inventory pricing scheme.
Option Price	If the Use Option Price is checked, enter the price to use for the Item. This price overrides any Inventory price for the Item. Sales and manufacturing effects are different.		This price is for the Inventory Item only. If there are additional actions linked to this Item on the list via the value column (Actions tab), those Items are individually priced in addition to the Item on the list. (It is not necessary to create an action Item for an Inventory Item ID in the list when the Line Type is Inventory.)

Action Detail tab

Field	Definition	Values	Effect
Use Override Price	Allows an override of the existing Inventory pricing scheme with a specific unit price (Sales).	Checked	When checked, will override the existing Inventory pricing scheme with your own specific unit price.
Override Price	Holds override price, if applicable.		This price will override the price of the Item as applicable.

How do I set my starting price?

In the General section:

- Set **Base Price From** to **None** - There is no base price for Sales Order configurations. All SO configurations are based on Inventory with an option override based on configuration prices.
- Set **Add Config Price** to **Inv. w/ Config Override** - The price is based on Inventory Item pricing, unless there is a value associated with configuration fields. Then the prices and formulas on the Field Detail, List Values, and Action Detail tabs may override Inventory pricing depending on how the options are set.

How do I set how the configuration pricing?

- Mark the **Use Option Price** check box on the List Values tab to set the **Option Price** for that Item, which will then appear on the Sales Order if the Item is selected during configuration.
- If you have actions on the Actions tab for the selected Item, the Item price will be based on Inventory pricing. To override the standard Inventory pricing, mark the **Use Override Price** check box on the Action Detail tab and enter an Item price in the **Override Price** field or a formula in the **Formula** field (mark the **Formula** check box).

Manufacturing Configuration

General Section

Field	Definition	Values	Effect
Default Price	The starting price of the configuration if base pricing is based on the configuration rather than Inventory. Additional pricing may be added to this as the configuration is processed.		
Base Price From	The value selected indicates whether a starting Base Price comes from the Base Price field of the Item's IN master record, or from the Default Price field, or no base starting price. Additional pricing may increase this base price as the configuration process is used.	None	Configurations will start with no Base Price.
		Inventory	Use the starting price from the Base Price field in IN Item record.
		Configuration	Starting price will be the value in the Default Price field.

Field	Definition	Values	Effect
Add Config Price	Determines how and if additional pricing will be added to the base price via the configuration question and answer process set up in the tabs section.	None	No additional pricing calculations based on configuration Items are used.
		Inv. w/ Config Override	This will add prices based on Item pricing found in Inventory unless there is a value associated with configuration fields, which appear as prices and formulas on the Field Detail, List Values, and Action Detail tabs. These fields will override (take the place of) Inventory pricing if used.

Field Detail tab

Field	Definition	Values	Effect
Data Type	Determines the type of question presented to the user.	Text	Use when the input needs to be free text in nature, that is, when you are not looking for a specific user response.
		Numeric	Forces the user to enter a numeric response to a question. Use this when you are looking for quantity-type information from the user.
		Yes/No	Use when the question requires a Yes or No answer. The answer can then be linked to Inventory Item(s) or other activity such as Freight or Manufacturing process costs. A default Yes or No should be preassigned.
		List	Create a list of specific choices to present to the user. These values are set up on the List Values tab. The choices are then used to select specific Inventory Items or actions such as adding a Freight charge, pulling an Inventory Item, or displaying a message.
Use Price Option	Allows the user to set up additional pricing considerations.	Checked	When checked, and with a Numeric and Yes/No data types, it allows you to set up additional pricing considerations.

Field	Definition	Values	Effect
Field Price	If the Use Price Option is checked, this represents the Base Price for the added charge, not Inventory Item, Labor, or Freight charges.		If the Use Price Option is checked, this is the base price for this added charge. This does not represent Inventory Item, Labor, or Freight charges.
Price Option	Allows the user to manipulate the value in the Field Price field, and determines how the user can manipulate the value. It is active only when the Use Price Option field is Checked.	Fixed Price	When the user enters a numeric value, that value replaces the value in the Field Price field.
		Price + Value	When the user enters a numeric value, that value is added to the value in the Field Price field.
		Price - Value	When the user enters a numeric value, that value is subtracted from the value in the Field Price field.
		Price * Value	When the user enters a numeric value, the value in the Field Price field is multiplied by that value.

List Values tab (only active with Line Type = List)

Field	Definition	Values	Effect
Use Option Price	Allows an override of the current Inventory pricing scheme with a specific price per unit for this Item. It is active only when the Line Type is Action (Manufacturing)	Checked	When the box is checked, it utilizes the value in the Option Price field to override the current Inventory pricing scheme.
Option Price	If the Use Option Price is checked, enter the price to use for the Item. This price overrides any Inventory price for the Item. Sales Orders and Manufacturing Orders effects are different.		This price is the total price for all linked actions. If there are actions linked to this Item on the list via the value column (Actions tab), those Items are not individually priced. Think of this like a kit price.

Action Detail tab

Field	Definition	Values	Effect
Use Override Price	Allows an override of inventory pricing for the component and set the price using the configuration (Manufacturing)	Checked	When checked, it will override Inventory pricing for this component and set the price using the configuration.
Override Price	Holds the override price, if applicable.		This price will override the price of the Item as applicable.

How do I set my starting price?

In the General section:

- Set **Base Price From** to **None** - There is no Base Price. All pricing will come from tab information.

OR

Set **Base Price From** to **Inventory** - The starting price is the Base Price of the Inventory Item.

OR

Set **Base Price From** to **Configuration** - The starting price is the value in the **Default Price** field.

How do I set how the configuration pricing?

In the General section:

- Set **Add Config Price** to **None** - Configuration items will not affect pricing. The total price will be the base price as set in the Base Price From field.

OR

Set **Add Config Price** to **Inv. w/ Config Override** - The price is based on Inventory Item pricing, unless there is a value associated with configuration fields. Then the prices and formulas on the Field Detail, List Values, and Action Detail tabs may override Inventory pricing depending on how the options are set.

In the Field Detail tab:

- Set **Data Type** to **Text** - The price will be the Inventory price, or in the case of an operation, the amount in the Price field or based on a Formula.
- Set **Data Type** to **Numeric** and set **Use Option Price** to **Checked** - The price will be based on the **Field Price** and **Price Option** fields. The field value, in terms of the price option field, is the value entered into this field during the configuration process.
- Set **Data Type** to **Yes/No** and set **Use Option Price** to **Checked** - The price will be based on the **Field Price** and **Price Option** fields. The field value in terms of the price option field: If the field is **Yes**, the field value is considered to be **1** in terms of the Price Option field calculation; if the field is **No**, the field value is considered to be **0**.

- Set **Data Type** to **List** and

set the Line Type to Information and set Use Override Price to Checked	Prices will be based on linked values in the Action Detail tab (Override Price).
set the Line Type to Information and set Use Override Price to Cleared	Prices will be based on Inventory pricing.
set the Line Type to Action and set Use Option Price to Checked	Prices will be based on the Option Price in the List Values tab. The option price will override all linked data in the Action Details tab. The result is one fixed price that includes all related components and processes, similar to a kit (the kit is priced, but the parts of the kit are not individually priced).
set the Line Type to Action and set Use Option Price to Cleared	Prices will be based on Inventory pricing.

SETTING UP A SALES ORDER CONFIGURATION

Because of the amount of flexibility you have when setting up a configuration, this topic will be a tutorial of sorts that will walk you through the process. Refer to the Configurator Basic Functionality section (page 3-13) for more general information about the Configuration Maintenance screen.

Planning the configuration before you do any system entry is essential to understanding how you want the configuration to work. To guide you through the process of creating a Sales Order configuration, we will use a sample configuration. We will walk through the planning, then the system entry for the configuration to help you understand the options available and the results determined by those options.

For a Sales Order configuration, determine what you want the Customer to “customize”. For this tutorial, we will allow our Customer to configure an aquarium, complete with fish.

Planning -- Stage 1

Before doing any entries into the system for your configuration, you need to plan what you want to configure, the options you will present to the user, and the pricing scheme you want to use for the configured item.

What can the Customer configure?

Examples of parts the Customer can customize:

- Size of the aquarium tank.
- Type of fish and how many in the aquarium.
- Whether the aquarium is a freshwater or saltwater aquarium.
- Whether to include plants in the aquarium and how many.
- Whether to include fish food.

What is included in the aquarium that the customer cannot configure?

Examples of parts the Customer cannot customize but must be included in the configured item:

- Filter
- Heater
- Gravel for the bottom of the tank

- Aerator pump
- Filter pump
- Thermometer
- Hydrometer

Do any of the components depend on choices the Customer makes?

Examples of parts that are included or excluded depending on what the Customer chooses in a previous question:

- The size of the filter depends on how big the tank is
- The size of the heater (wattage) depends on how big the tank is
- The amount of gravel included depends on how big the tank is
- The type of fish allowed depends on whether it is a saltwater or a freshwater aquarium
- Include fish food
- Include plants and ornaments

How do you want to price the configured aquarium?

- Straight Inventory pricing--the prices of the configured Items are added together for the final price.
- You want to determine the prices of some or all of the components no matter what the Inventory prices are, or there are no base Inventory prices set for some components.

Other things to consider:

- Will the description of the configured aquarium change depending on the components? (This is the description and additional description of the final configured aquarium.)
- Are there any restrictions, such as a limit to the number of certain fish in a particular size of aquarium?

Planning -- Stage 2

Stage 2 planning consists of laying out the options for each Item the Customer is allowed to configure.

In Stage 1, we determined the Customer can configure:

- Size of the aquarium tank
- Type of fish and how many in the aquarium
- Whether the aquarium is a freshwater or saltwater aquarium
- Whether there are plants and ornaments in the aquarium and how many
- Whether to include fish food

List the options we offer:

- Size of aquarium tank: 10 gal, 20 gal, 29 gal, 40 gal
- Type of fish: depends on whether the aquarium is freshwater or saltwater
 - Freshwater fish: guppy, angelfish, molly, plecostomus, and tiger barb
 - Saltwater fish: clownfish, damsel, foxface, lionfish, or tang

What do we include and when do we include it with the aquarium:

- If the size of the aquarium tank is 10 or 20 gal:
 - smaller filter
 - smaller heater
 - less gravel
- If the size of the aquarium tank is 29 gal or 40 gal:
 - larger filter
 - larger heater
 - more gravel
- If saltwater, include hydrometer
- If the Customer orders plants, include freshwater or marine plants depending on which type of aquarium the Customer chooses
- If the Customer orders fish food, include food for freshwater or marine fish depending on which type of aquarium the Customer chooses

More complex options we could set up might be restricting the type of fish that can live together in the tank or restricting the number of fish allowed for each tank size. We can set up warning messages for the customer, or we can create a more complex configuration that will handle the situations.

Planning -- Stage 3

To keep things simpler for this example, we will use Inventory pricing where available for Inventory Items.

- Straight Inventory pricing--the prices of the configured Items are added together for the final price
- Due to a temporary shortage of aquatic marine plants, we will override the Inventory price for the plants in saltwater aquariums

Once you have a good idea of how you want to set up the configuration, you can set up the configuration in the system.

Set up - Inventory Items

Before you start setting up the configuration, make sure all the Inventory Items available or required for the configuration are set up in Inventory. Reference the Inventory Training Manual for information on setting up Items.

When you set up a configuration, you will need to choose a base Item from Inventory. This is the basic Item you will be configuring. In this case, the base Item is an aquarium. The base Item can have its own price, which will become part of the price of the configured Item.

Make sure you have set a **Base Price** for each of the Items if you want the Inventory price to affect the price of the configured Item.

To view Item costs in the Configurator screens, if you use Average costing, make sure you have set an **Average** cost for each Item. If you use Standard costing, make sure you have set a **Standard** cost for each item.

IN Items

Item ID: AQUSWHRDRO
Description: Salt water instand Hydrometer
Base Unit: EA

Location: CA0001, MD0001, MN0001, TX0001


General: Location Status: Active, Forecast Type: , Account Code: 01

Costs: Average: 2.9900, Last: 2.9900, Base: 2.9900, Standard: 2.9900

Price Info: Set an Average cost if you use average costing, Set a Standard cost if you use standard costing

Unit	Average Price	Base Price	List Price	Ext Cost
EA	7.4900	7.4900	7.9900	6.4900

Set up - Configurator header

- Open the Configuration Maintenance function from the Configurator Setup and Maintenance menu.
- Create a new configuration by clicking the **New Record** button  on the toolbar.
- Enter a description for the configuration in the Config Desc field. For our example, we will enter FISHTANKKIT.

Set up - General section

General

Config Type: Sales Orders
Category ID: Aquariums
Base Item ID: AQUARIUM
Customer ID:

Custom Output:
Active From/Thru: 9/1/2017 to 12/31/2018
Config Desc Type: Fixed + Values
Config Item Desc: Aquarium fish tank kit

Part Number Type: Auto
Default Price: 0.0000
Base Price From: None
Add Config Price: Inventory w/ Config Override
☒ Allow Constraint Violations


1. Select **Sales Orders** as the **Config Type**.
2. Select an appropriate configuration **Category ID** from the drop-down list (Aquarium).
3. Select the base Item for the configuration from the **Base Item ID** drop-down list.
4. Because we are not setting this up for a particular Customer, we will leave the **Customer ID** field blank. If the configuration is specific to a certain Customer, enter or select the Customer ID.
5. If applicable, select a date range within which the configuration will be active in the **Active From/Thru** fields.
6. The finished configuration will become a new part number. To create a Description for the new Item, select **Fixed** in the **Config Desc Type** field. If you want to create a description that will also include the description and additional description of the base Item, select **Fixed + Values**. This example has Fixed + Values selected.
7. Enter a description for the configured Item in the **Config Item Desc** field. (Aquarium fish tank kit)
8. Because this is a Sales Order configuration, the **Part Number Type**, **Default Price**, **Base Price From**, and **Add Config Price** fields are disabled.
9. Mark the **Allow Constraint Violations** check box to allow constraint violations to be overridden when answering questions during the order generation. Clear the check box to apply the constraint violation rules that can't be overridden.

Set up - Groups section

Group ID	Tab Order	Description
TANK	10	Tank Size
> HTFLT	20	Heater and Filter
WRTCD	25	Water conditioner & treatment
ACC	30	Accessories
FISH	40	Fish
FOOD	50	Fish Food
* Record 2 of 6		

The **Groups** section allows you to create different groupings of questions. Each Group can focus on one aspect of the product--each Group has its own list of questions. In our example, the Customer can configure the size of the aquarium tank, whether the aquarium is freshwater or saltwater, the heater and filter to use, the conditioner and treatment, accessories such as plants and ornaments, the fish, and food.

We can split these options up logically into groups: TANK, HTFLT, WRTCD, ACC, FISH, and FOOD.

1. Click in a blank record or use the **Append** button  to create a new **Group ID**.
2. Enter up to 5 characters for the **Group ID**.
3. The **Tab Order** defines the sequence in which the groups will be presented to the Customer. To reorder the groups, edit the Tab Order number.
4. Enter a **Description** for the group.

Set up - Tabs section

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> HEATER	What size heater do you want?	HTFLT	10		Build	<input checked="" type="checkbox"/>
THERM	Do you want a thermometer?	HTFLT	15		Build	<input type="checkbox"/>
AIRPUMP	What size air pump do you need?	HTFLT	20		Build	<input checked="" type="checkbox"/>
AIRSTN	How many air stones do you want?	HTFLT	30		Build	<input checked="" type="checkbox"/>
FILTER	What size water filter do you need?	HTFLT	40		Build	<input checked="" type="checkbox"/>
FLTRCTR	Do you want extra filter cartridges?	HTFLT	50		Build	<input type="checkbox"/>

Record 1 of 6

The Tabs section defines the question and answer flow, pricing, quantity determination, etc. The Tabs section determines how the configuration works.

Each Group has its own list of Labels/Questions, so the process of setting up each field must be repeated for each group.

TANK Group

In our example, the TANK group questions will be presented to the user first (Tab Order = 10). Select the TANK group in the Groups section.

In review:

With regard to aquarium tanks, the Customer can configure:

- Size of aquarium tank: 10 gal, 20 gal, 29 gal, 40 gal
- The type of water for the fish: freshwater or saltwater

We have a few conditions to consider:


- If the aquarium tank is 10 or 20 gal, include smaller filter, heater, and less gravel.
- If the aquarium tank is 29 or 40 gal, include larger filter, heater, and more gravel.

We can present the customer with a list of options for the tank and the water type.

Fields tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
TANKSZ	What size tank do you want 10, 20, 29 or 40 gal?	TANK	10		Build	<input checked="" type="checkbox"/>
WATER	Do you want fresh or salt water fish?	TANK	20		Build	<input checked="" type="checkbox"/>

Record 1 of 2

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the first question. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our first question is about the tank size, we can enter a field ID of TANKSZ.
3. In the **Label/Question** field, enter the question the Customer will need to answer, such as: What size tank do you want 10, 20, 29 or 40 gal?
4. The **Tab Order** should be **10**, to ask this question first.
5. The **Display When** and **Build** fields are not used for this question, since we are not filtering the question.
6. The question must be answered; the Customer cannot skip it. Mark the **Required** check box to ensure the Customer will answer the question.

Field Detail tab

The **Field Detail** tab gives more detail about the selected field. Use the navigation buttons at the bottom of the tab to move from record to record.

For the TANKSZ field:

The screenshot shows the 'Field Detail' tab for the 'TANKSZ' field. The configuration includes:

- Field ID:** TANKSZ
- Group / Order:** TANK (dropdown), 10 (text)
- Label:** What size tank do you want 10, 20, 29 or 40 gal?
- Line Type:** Inventory (dropdown), Allow Qty's (checkbox)
- Data Type:** List (dropdown), Multiple Selections (checkbox)
- Text Length:** (empty)
- Display When:** (empty)
- Help Text:** (empty)
- Limit to List:** (checked checkbox)
- Build:** (button)
- Precision:** 0 (spin box)
- Min Value:** 0 (spin box)
- Max Value:** 0 (spin box)
- Increment:** 1 (spin box)
- Numeric Warn:** (checkbox)
- Print Group:** (checkbox)
- Default Value:** (empty)
- Use Field Price:** (checkbox)
- Field Price:** 0.0000 (spin box), Picture (button)
- Price Option:** Fixed Price (dropdown), Media (button)
- Required:** (checked checkbox)
- Long Descr:** (empty text area)
- Smart ID Len:** (empty)
- Smart ID Value:** (empty)

1. We have a 10 gal tank, a 20 gal tank, a 29 gal tank, and a 40 gal tank in inventory. We can allow the user to select the inventory item with their answer to the question.
2. In the **Line Type** field, select Inventory from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer will only order one tank, leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.

List Values tab

The screenshot shows the 'List Values' tab for the 'TANKSZ' field. The configuration includes:

- Option List:** A list of four options: 10 Gallon Hooded Aquarium, 20 Gallon Hooded Aquarium, 29 Gallon Hooded Aquarium, and 40 Gallon Hooded Aquarium.
- Item ID:** AQU10GAL
- Use Option Price:** (checkbox)
- Option Price:** 0.0000 (spin box), Formula (button)
- Location ID:** MN0001 (dropdown)
- Unit:** EA (dropdown), Media (button)
- Quantity:** 1.0000 (spin box)
- Smart ID Value:** (empty)
- Long Description:** (empty text area)
- Option Picture:** Use Item Picture (checked checkbox), and a photo of a 10-gallon aquarium.

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Select an Inventory Item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select a **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.
5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. Enter the **Quantity** of the Item to include in the configuration. By default, the quantity is 1.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we are working with the TANKSZ field, we only have 4 choices for the tank size and don't need to have actions on these tank sizes. We will select the components that go into the tank in later questions.

For the WATER field:

Fields | **Field Detail** | List Values | Actions | Action Detail

Field ID: WATER

Group / Order: TANK 20

Label: Do you want fresh or salt water fish?

Line Type: Information

Data Type: List

Text Length:

Display When:

Help Text:

Precision: 0

Min Value: 0

Max Value: 0

Increment: 0

Numeric Warn:

Print Group:

Build

Default Value:

Use Field Price:

Field Price: 0.0000

Price Option: Fixed Pri...

Required: ☒

Long Descr:

Smart ID Len:

Smart ID Value:

1. We have a the choices of filling our tank with freshwater or saltwater. We can allow the user to select information choices with their answer to the question.
2. In the **Line Type** field, select **Information** from the drop-down list. This means the answer to the question is for information that will be used later.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer will only indicate one water type, leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.

List Values tab

Fields | Field Detail | **List Values** | Actions | Action Detail

Option List

- Freshwater
- Saltwater

Item ID:

Use Option Price:

Option Price: 0.0000

Location ID:

Unit:

Quantity: 1.0000

Smart ID Value:

Long Description:

Media

Option Picture

Use Item Picture:

No image data

Record 1 of 2


The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Enter the selections you want your Customer to make, for the **Option List**.
2. If you want to associate a media code with the Item, use the **Media** button.
3. Enter the **Quantity** of the Item to include in the configuration. By default, the quantity is 1.
4. Enter a **Long Description** for the option, if applicable.
5. Repeat Steps 1 to 4 for each option in the list.

Actions tab

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we are working with the WATER field, we only have 2 choices for the type of water, and don't need to have actions on these water types. We will use the selection in later questions.

Use the **Save** button  on the toolbar to save your changes.

HTFLT Group

In our example, the HTFLT group questions will be presented to the user second (Tab Order = 20). Select the HTFLT group in the Groups section.

In review:

With regard to aquarium heater and filter, the Customer can configure:

- Size of aquarium heater: 50W, 100W, 150W, 200W
- If they want a thermometer for their tank
- Size of aquarium air pump
- How many air stones they want for their air pump
- Size of the water filter for their tank
- If they want extra water filter cartridges

We have a few conditions to consider:

- If the aquarium tank is 10 or 20 gal, include smaller filter and heater.
- If the aquarium tank is 29 or 40 gal, include larger filter and heater.


We can present the customer with a list of options for the each field.

For the HTFLT Group:

Field tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
HEATER	What size heater do you want?	HTFLT	10		Build	<input checked="" type="checkbox"/>
> THERM	Do you want a thermometer?	HTFLT	15		Build	<input type="checkbox"/>
AIRPUMP	What size air pump do you need?	HTFLT	20		Build	<input checked="" type="checkbox"/>
AIRSTN	How many air stones do you want?	HTFLT	30		Build	<input checked="" type="checkbox"/>
FILTER	What size water filter do you need?	HTFLT	40		Build	<input checked="" type="checkbox"/>
FLTRCTR	Do you want extra filter cartridges?	HTFLT	50		Build	<input type="checkbox"/>

Record 2 of 6

1. Select the HTFLT Group from the Groups section.
2. Click in a blank record or use the **Append** button  to add a new record.
3. Enter a **Field ID**. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our second question is about the heaters and filters, we can enter field IDs of HEATER, THERM, AIRPUMP, AIRSTN, FILTER, AND FLTRCTR.
4. In the **Label/Question** field, enter the questions the Customer will need to answer, such as: What size heater do you want?, Do you want a thermometer?, What size air pump do you need?, How many air stones do you want?, What size water filter do you need?, and Do you want extra filter cartridges?
5. The HEATER, AIRPUMP, AIRSTN, AND FILTER questions must be answered; the customer cannot skip them. Mark the **Required** check box to ensure the Customer will answer the questions.

The other questions are optional to answer, so the Required box may be cleared.

6. Each question is valid for both freshwater and saltwater tanks, so we will leave the **Display When** blank and not use the **Build** button.

HEATER Field Detail tab

1. We have multiple aquarium heaters in inventory. We can allow the user to select the inventory item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer will only order one heater, leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.
6. Enter a **Long Description** for the field detail, if applicable.

HEATER List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Select an Inventory item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.
5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. Enter the **Quantity** of the Item to include in the configuration. By default, the quantity is 1.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

HEATER Actions tab


FieldsField DetailList ValuesActionsAction Detail

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	100W Aquarium Heater	Display Message		Use with 20 gallon aquarium.
With Value	20	150W Aquarium Heater	Display Message		Use with 29 gallon aquarium.
With Value	30	200W Aquarium Heater	Display Message		Use with 40 gallon aquarium.
With Value	40	50W Aquarium Heater	Display Message		Use with 10 gallon aquarium.

Record 1 of 4

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.


We want to display a message to help the Customer select the correct heater, we will display a message for each heater.

1. Click in a blank record or use the **Append** button  to add a new record.
2. In the **Event** field select **With Value** to display the message when a selection is made.
3. The **Sequence** will auto- populate with the next number.
4. Select the **Value** with which you want to display the message. The list will show the Option List from the List Values tab.
5. Select **Display Message** from the **Action Type** drop down list.
6. Enter the **Message/Text Line** information you want displayed in the message box. For example; Use with 20 gallon aquarium.

Action Detail tab

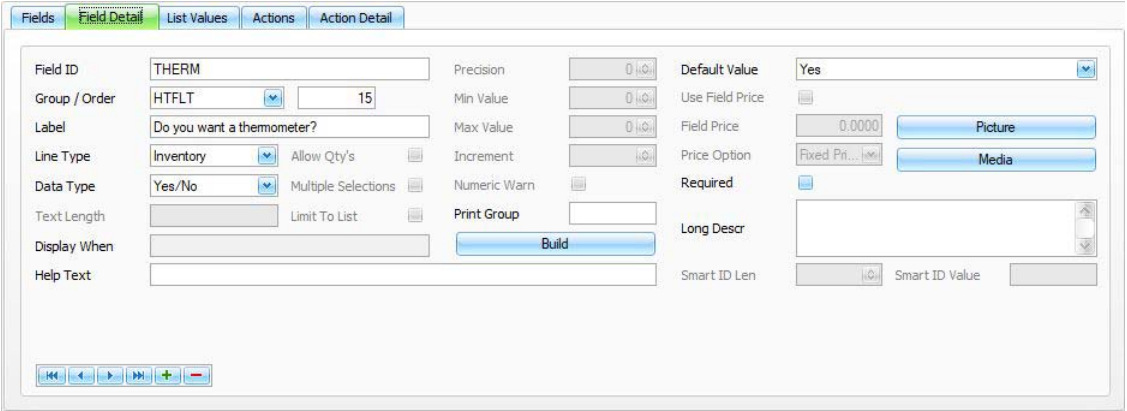
The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

Because our Actions will display a message, the Action Detail tab is blank.

Use the **Save** button  on the toolbar to save your changes.

For the THERM field:

Field Detail tab



The screenshot shows the 'Field Detail' tab for the 'THERM' field. The interface includes a toolbar at the top with tabs: Fields, Field Detail (selected), List Values, Actions, and Action Detail. The main area contains various configuration fields:

- Field ID:** THERM
- Group / Order:** HTFLT (dropdown), 15 (text)
- Label:** Do you want a thermometer?
- Line Type:** Inventory (dropdown), Allow Qty's (checkbox)
- Data Type:** Yes/No (dropdown), Multiple Selections (checkbox)
- Text Length:** (text), Limit To List (checkbox)
- Display When:** (text)
- Help Text:** (text)
- Precision:** 0 (spin box)
- Min Value:** 0 (spin box)
- Max Value:** 0 (spin box)
- Increment:** (spin box)
- Numeric Warn:** (checkbox)
- Print Group:** (text)
- Default Value:** Yes (dropdown)
- Use Field Price:** (checkbox)
- Field Price:** 0.0000 (text), Picture (button)
- Price Option:** Fixed Pri... (dropdown), Media (button)
- Required:** (checkbox)
- Long Descr:** (text area)
- Smart ID Len:** (text)
- Smart ID Value:** (text)

A 'Build' button is located in the center of the form. At the bottom, there is a toolbar with navigation and action icons.

1. We have one thermometer in inventory. We will provide the Customer with a Yes/No question as to whether they want a thermometer or not.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item for the configuration.

3. To present a yes or no choice to the customer, select **Yes/No** from the **Data Type** drop-down list.
4. Because the Customer will be presented with a Yes/No question, the **Allow Qty's**, **Multiple Selections**, and **Limit to List** fields will be disabled.
5. Select a **Default Value** to display with the question: **Yes** or **No**.
6. Enter a **Long Description** for the field detail, if applicable.

List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select inventory items as the contents of the list of options for the Customer.


Since we selected Yes/No as the Data Type on the Field Detail tab, the List Values tab will be blank.



Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	Yes	Add Material	AQUTHERM	
With Value	20	No	Display Message		No thermometer selected.

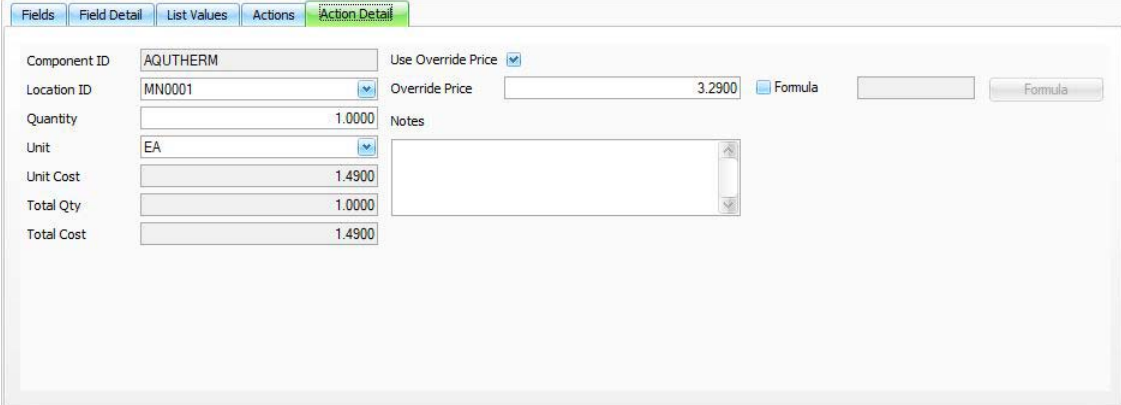
The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we selected **Yes/No** as the **Data Type** we will be required to enter actions to be done with the responses of Yes or No.

1. Click in a blank record or use the **Append** button  to add a new record.
2. In the **Event** field select **With Value** to update the question.
3. Select **Yes** in the **Value** field to enter the Item to select when the Customer answers the question with a Yes response.

4. Select **Add Material** in the **Action Type** field to activate the Action field with a list of Inventory Items.
5. Select the Inventory Item for the thermometer you have in your Inventory from the **Action** field drop down list.
6. Click in a blank record or use the **Append** button  to add a new record.
7. In the **Event** field select **With Value** to update the question.
8. Select **No** in the **Value** field to enter the message to display when the Customer answers the question with a No response.
9. Select **Display Message** in the **Action Type** field to activate the Message/Text Line field to enter a message to display.
10. Enter the message you want displayed into the **Message/Text** Line field. (No thermometer selected.)
11. Use the **Save** button  on the toolbar to save your changes.

Action Detail tab



The screenshot shows the 'Action Detail' tab in a software application. The tab is active and displays various fields for configuration. On the left, there is a list of fields: Component ID, Location ID, Quantity, Unit, Unit Cost, Total Qty, and Total Cost. Each field has a corresponding value displayed next to it. On the right, there are fields for 'Use Override Price' (checked), 'Override Price' (3.2900), and a 'Notes' field. There are also buttons for 'Formula' and 'Formula'.

Field	Value
Component ID	AQUTHERM
Location ID	MN0001
Quantity	1.0000
Unit	EA
Unit Cost	1.4900
Total Qty	1.0000
Total Cost	1.4900

Use Override Price: ☒ Override Price: 3.2900 Formula: Formula:


Notes:

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Actions tab.

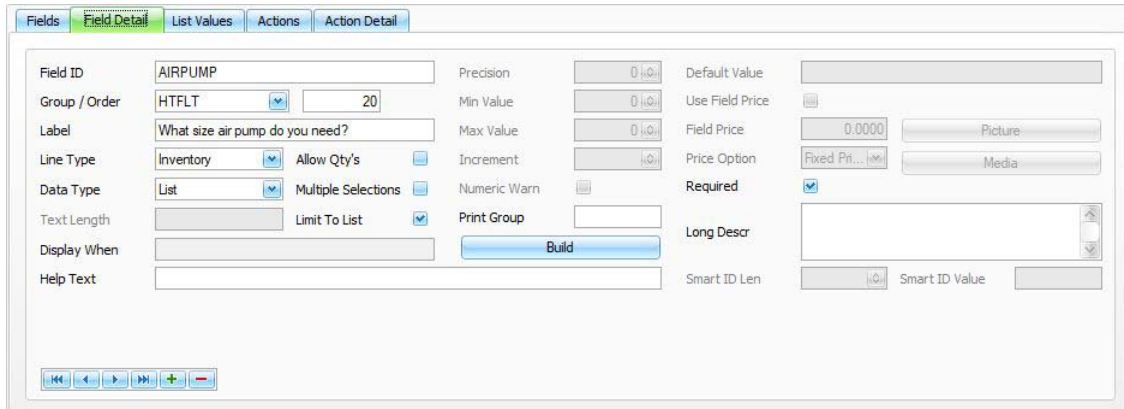
1. On the Actions tab, select the Yes action for which you want to view details, then click on the Action Detail tab. Details about the selected action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Quantity** of the Item included in the configuration.
4. Accept or edit the **Unit** of measure for the Item.

5. Add any **Notes** about the Item or Action.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Use the **Save** button  on the toolbar to save your changes.

AIRPUMP Field Detail tab



1. We have multiple aquarium air pumps in inventory. We can allow the user to select the Inventory Item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer will only order one air pump, leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.
6. Enter a **Long Description** for the field detail, if applicable.

AIRPUMP List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Select an Inventory item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.
5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. Enter the **Quantity** of the Item to include in the configuration. By default, the quantity is 1.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

AIRPUMP Actions tab


FieldsField DetailList ValuesActionsAction Detail

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	10 Gal Aquar Air Pump	Add Material	AQUAIRTUBE	
With Value	20	20 Gal Aquar Air Pump	Add Material	AQUAIRTUBE	
With Value	30	29 Gal Aquar Air Pump	Add Material	AQUAIRTUBE	
With Value	40	40 Gal Aquar Air Pump	Add Material	AQUAIRTUBE	

Record 1 of 4

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

We want to include an air tube with the air pump automatically.

1. Click in a blank record or use the **Append** button  to add a new record.
2. In the **Event** field select **With Value** to display the message when a selection is made.
3. The **Sequence** will auto- populate with the next number.
4. Select the **Value** with which you want to include the air tube. The list will show the Option List from the List Values tab. We want each air pump to include the air tube.
5. Select **Add Material** from the **Action Type** drop down list.
6. Select the same air tube Item ID for each air pump we have entered on the List Values tab.

Action Detail tab

The screenshot shows the 'Action Detail' tab of a software interface. The tab is highlighted in green. The form contains the following fields and values:

Field	Value
Component ID	AQUAIRTUBE
Location ID	MN0001
Quantity	1.0000
Unit	EA
Unit Cost	0.9900
Total Qty	1.0000
Total Cost	0.9900


Additional fields and controls include:

- Use Override Price**: A checkbox that is currently unchecked.
- Override Price**: A text field containing the value 0.0000.
- Formula**: A button next to the Override Price field.
- Notes**: A large text area for entering notes.

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

1. On the Actions tab, select the action for which you want to view details, then click on the Action Detail tab. Details about the selected action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Quantity** of the Item included in the configuration.
4. Accept or edit the **Unit** of measure for the Item.
5. Add any **Notes** about the Item or Action.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Use the **Save** button  on the toolbar to save your changes.

AIRSTN, FILTER, and FLTRCTR Fields

Set up the questions for the air stones and water filters as Inventory Line Types with List Data Types. Select the corresponding Items on the List Values to give the Customer the available selections for each Field question. These Field questions are simple lists of Inventory Items to select from, so there are no Actions entered.

Set up the question for the extra filter cartridge as an Inventory Line Type with Yes/No as the Data Type. Set up this question like the thermometer above with the filter cartridge as the Item to fill the Yes response.

WRTCD Group

In our example, the WRTCD group questions will be presented to the user third (Tab Order = 22). Select the WRTCD group in the Groups section.

In review:

With regard to aquarium water conditioner and treatment, the Customer can configure:

- Size of aquarium conditioner: 4 oz, 8 oz, 16 oz
- If they selected saltwater, the size of salt bag: 16 oz, 32 oz, 64 oz
- If they want a freshwater or saltwater test kit
- If they want a hydrometer

We have a few conditions to consider:

- If the aquarium tank is saltwater, ask what size salt they want.
- If the aquarium tank is saltwater if they want a hydrometer.

We can present the customer with a list of options for the each field.

Fields tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
COND	What size water conditioner do you want?	WRTCD	10		Build	<input checked="" type="checkbox"/>
SALT	What size aquarium salt do you want?	WRTCD	20	[WATER] = 'Saltwater'	Build	<input type="checkbox"/>
FWTEST	Do you want a freshwater test kit?	WRTCD	30	[WATER] = 'Freshwater'	Build	<input type="checkbox"/>
SWTEST	Do you want a saltwater test kit?	WRTCD	40	[WATER] = 'Saltwater'	Build	<input type="checkbox"/>
HYDRO	Do you want a hydrometer?	WRTCD	50	[WATER] = 'Saltwater'	Build	<input type="checkbox"/>

Record 1 of 5

In our example, the WRTCD group questions will be presented to the user to determine the water conditioner, what size salt to purchase if they have a saltwater tank, if they want a freshwater or saltwater test kit and if they want a hydrometer for their saltwater tank.

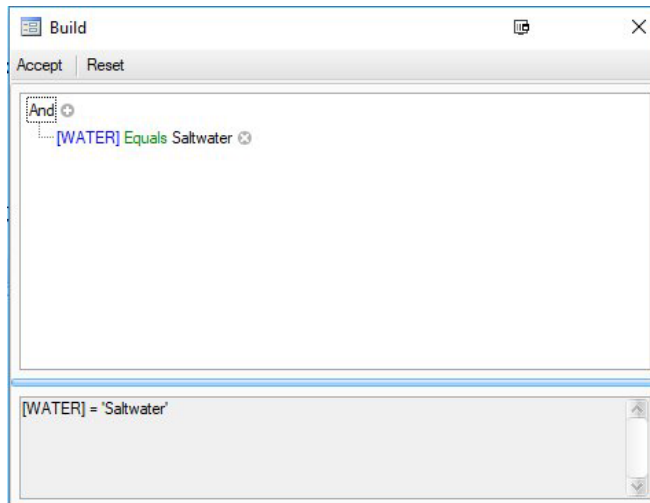
1. Click in a blank record or use the **Append** button  to add a new record.

2. Enter a **Field ID**. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our third question is about the water conditioner and treatment, we can enter field IDs of COND, SALT, FWTEST, SWTEST, and HYDRO.
3. In the **Label/Question** field, enter the questions the Customer will need to answer, such as: What size water conditioner do you want?, What size aquarium salt do you want?, Do you want a freshwater test kit?, Do you want a saltwater test kit?, and Do you want a hydrometer?
4. The COND question must be answered; the customer cannot skip it. Mark the **Required** check box to ensure the Customer will answer the questions.

The other questions are optional to answer, so the **Required** box may be cleared.

5. The COND question is valid for both freshwater and saltwater tanks, so we will leave the **Display When** blank and not use the **Build** button.
6. The SALT, FWTEST, SWTEST and HYDRO questions are specific to either Freshwater or Saltwater selections.
7. For these questions use the Build button to create the filter for either Freshwater or Saltwater.
8. To set up logic in the Display When field, use the **Build** button to open a dialog box where you can build the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

WRTCD Group - Fields Tab - Build



- Select the **WATER** group from the **blue** selection option.
- Select **Equals** from the **green** filter type selection option.
- Select the corresponding “Saltwater” or “Freshwater” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

COND Field Detail tab

1. We have multiple aquarium conditioners in inventory. We can allow the user to select the inventory item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer may order more than one conditioner, mark the **Allow Qty's** and **Multiple Selections** check boxes.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.
6. Enter a **Long Description** for the field detail, if applicable.

COND List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.


1. Select an Inventory item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.
5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. Enter the **Quantity** of the Item to include in the configuration. By default, the quantity is 1.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we are working with the COND field, we only have 3 choices for the size of conditioner bottle, and don't need to have Actions on these conditioner bottles.

Use the Save button  on the toolbar to save your changes.

SALT Field ID

The SALT field is set up in the same manner as the COND field, with the exception of the Display When field filtering for only Saltwater type WATER.

FWTEST, SWTEST, and HYDRO Field IDs

The remaining Field IDs in the group are all set up with Inventory as the Line Type and Yes/No as the Data Type, as the Yes/No fields above.

ACC Group

In our example, the ACC group questions will be presented to the user forth (Tab Order = 30). Select the ACC group in the Groups section.

In review:

With regard to aquarium accessories, the Customer can configure:

- Size and color of aquarium gravel.
- What kind of plants they want for their tank.
- What kind of ornaments they want for their tank.

We have a few conditions to consider:

- The amount of gravel to use in the tank depends on the size of the tank.


We can present the customer with a list of options for the each field.

Fields tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
GRAVEL	What color and size gravel do you want?	ACC	10		Build	<input checked="" type="checkbox"/>
PLANT	What plants do you want?	ACC	20		Build	<input type="checkbox"/>
DECOR	What ornaments do you want?	ACC	30		Build	<input type="checkbox"/>

Record 1 of 3

In our example, the ACC group questions will be presented to the user to determine the accessories the customers wants, what color gravel to purchase, if they want plants, and if they want ornaments for their tank.

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID**. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our third question is about the water conditioner and treatment, we can enter field IDs of GRAVEL, PLANT, and DECOR.
3. In the **Label/Question** field, enter the questions the Customer will need to answer, such as: What color and size gravel do you want?, What plants do you want?, and What ornaments do you want?
4. The GRAVEL question must be answered; the customer cannot skip it. Mark the **Required** check box to ensure the Customer will answer the questions.

The other questions are optional to answer, so the **Required** box may be cleared.

5. Each of the ACC questions are valid for both freshwater and saltwater tanks, so we will leave the **Display When** blank and not use the **Build** button.

ACC Group Field Detail

The screenshot shows the 'Field Detail' configuration window for an 'ACC' group. The 'Field ID' is 'GRAVEL'. The 'Label' is 'What color and size gravel do you want?'. The 'Line Type' is set to 'Inventory', and the 'Data Type' is 'List'. The 'Allow Qty's', 'Multiple Selections', and 'Limit To List' checkboxes are all checked. A 'Build' button is located below the 'Limit To List' checkbox. Other configuration options include 'Precision', 'Min Value', 'Max Value', 'Increment', 'Numeric Warn', 'Print Group', 'Default Value', 'Use Field Price', 'Field Price' (0.0000), 'Price Option' (Fixed Price), 'Required' (checked), 'Long Descr', 'Smart ID Len', and 'Smart ID Value'.

1. We have multiple aquarium gravel, plants, and ornaments in Inventory. We can allow the user to select the Inventory Item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer may order more than one gravel, plant, and ornament, mark the **Allow Qty's** and **Multiple Selections** check boxes.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.

GRAVEL, PLANT, and DECOR List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Select an Inventory item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.
5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. Enter the **Quantity** of the Item to include in the configuration. By default, the quantity is 1.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> Before Field	10		Display Message		Use 1 to 1 1/2 lbs of gravel per gallon of tank. ...

Record 1 of 1

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

We want to display a message to help the Customer purchase the correct quantity of gravel for their tank, we will display a message before they select gravel.

1. Click in a blank record or use the **Append** button to add a new record.
2. In the **Event** field select **Before Field** to display the message before a selection is made.
3. The **Sequence** will auto- populate with the next number.
4. Select **Display Message** from the **Action Type** drop down list.
5. Enter the **Message/Text Line** information you want displayed in the message box. For example; Use 1 to 1 ½ lbs of gravel per gallon of tank. Rinse thoroughly in cold water before using. Never use soap or detergent.
6. Use the Save button on the toolbar to save your changes.

Action Detail tab

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

Because our Actions will display a message, the Action Detail tab is blank.

FISH Group

In our example, the FISH group questions will be presented to the user fifth (Tab Order = 40). Select the FISH group in the Groups section.

In review:

With regard to fish, the customer can choose:

- Type of aquarium: Freshwater or saltwater
- Types of fish and how many

We have a few conditions to consider:


- If the aquarium is a freshwater aquarium, the only fish options should be freshwater fish.
- If the aquarium is a saltwater aquarium, the only fish options should be marine fish.

We can present the customer with a list of options for fish.

Field tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> FWFISH	Which freshwater fish would you like?	FISH	10	[WATER] = 'Freshwater'	Build	<input type="checkbox"/>
SWFISH	Which saltwater fish would you like?	FISH	20	[WATER] = 'Saltwater'	Build	<input type="checkbox"/>

Record 1 of 2

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the first question. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our question is about the type of fish the Customer wants, we can enter a field ID of FWFISH.
3. In the **Label/Question** field, enter the question the Customer will need to answer, such as: Which freshwater fish would you like?
4. The question does not need be answered; the customer may skip it. Clear the **Required** check box allow the customer to skip the question.
5. To set up logic in the **Display When** field, use the **Build** button to open a dialog box where you can build the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

FISH Group - Fields Tab - Build

The 'Build' dialog box is shown with the following content:

- Buttons: Accept, Reset
- Logic Statement: [WATER] Equals Saltwater
- Preview: [WATER] = 'Saltwater'

- Select the **WATER** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Saltwater” or “Freshwater” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The 'Field Detail' tab is shown with the following configuration:

- Field ID: FWFISH
- Group / Order: FISH, 10
- Label: Which freshwater fish would you like?
- Line Type: Inventory, Allow Qty's: ☒
- Data Type: List, Multiple Selections: ☒
- Text Length: Limit To List: ☒
- Display When: [WATER] = 'Freshwater'
- Help Text:
- Precision: 0
- Min Value: 0
- Max Value: 0
- Increment: 1
- Numeric Warn: ☐
- Print Group:
- Default Value:
- Use Field Price: ☐
- Field Price: 0.0000
- Price Option: Fixed ...
- Required: ☐
- Long Descr:
- Smart ID Len:
- Smart ID Value:

The 'Build' button is located below the 'Display When' field.

The **Field Detail** tab gives more detail about the selected field. Use the navigation buttons at the bottom of the tab to move from record to record.

1. We have multiple freshwater fish options in Inventory. We can allow the user to select the Inventory Item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer may order more than one type of fish, and/or more than a quantity of one, mark the **Allow Qty's** and **Multiple Selections** check boxes.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.
6. Enter a **Long Description** for the field detail, if applicable.

List Values tab

The screenshot shows the 'List Values' tab in a software configurator. On the left, there is a list of options: 'Freshwater Guppy', 'Freshwater Angel Fish', 'Freshwater Molly Fish', 'Freshwater Plecostomus Fish', and 'Freshwater Tiger Barb Fish'. The 'Freshwater Angel Fish' option is selected. The main area displays details for this item, with 'Item ID' set to 'AQUANGLFWFSH'. Below this, there are fields for 'Use Option Price' (checked), 'Option Price' (0.0000), 'Location ID' (MN000), 'Unit' (EA), and 'Quantity' (1.0000). There is also a 'Smart ID Value' field and a 'Long Description' text area. On the right, there is a section for 'Option Picture' with a checkbox 'Use Item Picture' (checked) and a photo of a Freshwater Angel Fish.

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Select an Inventory Item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select a **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.

5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. By default, the **Quantity** of the Item to include in the configuration is 1. We are allowing the Customer to enter a quantity of the selected fish. The number of fish included in the configuration will be the quantity from the List Values tab multiplied by the quantity entered by the Customer.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.


Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> Before Field	10		Display Message		Fish quantity should be about 1 inch of fish per gallon of water.

Record 1 of 1

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

We want to display a message to help the Customer stay within the quantity of fish for their tank, we will display a message before they select fish.

1. Click in a blank record or use the **Append** button  to add a new record.
2. In the **Event** field select **Before Field** to display the message before a selection is made.
3. The **Sequence** will auto- populate with the next number.
4. Select **Display Message** from the **Action Type** drop down list.

5. Enter the **Message/Text Line** information you want displayed in the message box. For example; Fish quantity should be about 1 inch of fish per gallon of water.

Action Detail tab


The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

Because our Actions will display a message, the Action Detail tab is blank.

For the **SWFISH** field:

Field tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
FWFISH	Which freshwater fish would you like?	FISH	10	[WATER] = 'Freshwater'	Build	<input type="checkbox"/>
SWFISH	Which saltwater fish would you like?	FISH	20	[WATER] = 'Saltwater'	Build	<input type="checkbox"/>

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the first question. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our question is about the type of fish the Customer wants, we can enter a field ID of SWFISH.
3. In the **Label/Question** field, enter the question the Customer will need to answer, such as: Which freshwater fish would you like?
4. The question does not need be answered; the customer may skip it. Clear the **Required** check box allow the customer to skip the question.
5. To set up logic in the **Display When** field, use the **Build** button to open a dialog box where you can build the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

FISH Group - Fields Tab - Build

- Select the **WATER** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Saltwater” or “Freshwater” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The **Field Detail** tab gives more detail about the selected field. Use the navigation buttons at the bottom of the tab to move from record to record.

1. We have multiple saltwater fish options in Inventory. We can allow the user to select the Inventory Item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer may order more than one type of fish, and/or more than a quantity of one, mark the **Allow Qty's** and **Multiple Selections** check boxes.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.
6. Enter a **Long Description** for the field detail, if applicable.

List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Select an Inventory Item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select a **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.

5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. By default, the **Quantity** of the Item to include in the configuration is 1. We are allowing the Customer to enter a quantity of the selected fish. The number of fish included in the configuration will be the quantity from the List Values tab multiplied by the quantity entered by the Customer.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.


Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> Before Field	10		Display Message		Fish quantity should be about 1 inch of fish per gallon of water.

Record 1 of 1

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

We want to display a message to help the Customer stay within the quantity of fish for their tank, we will display a message before they select fish.


1. Click in a blank record or use the **Append** button  to add a new record.
2. In the **Event** field select **Before Field** to display the message before a selection is made.
3. The **Sequence** will auto- populate with the next number.
4. Select **Display Message** from the **Action Type** drop down list.

5. Enter the **Message/Text Line** information you want displayed in the message box. For example; Fish quantity should be about 1 inch of fish per gallon of water.

Action Detail tab

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

Because our Actions will display a message, the Action Detail tab is blank.

Use the **Save** button  on the toolbar to save your changes.

For the FOOD group:

In our example, the FOOD group questions will be presented to the user sixth (Tab Order = 50). Select the FOOD group in the Groups section.

In review:

With regard to fish food, the customer can choose:

- Type of aquarium: Freshwater or saltwater
- Types of food and how many

We have a few conditions to consider:


- If the aquarium is a freshwater aquarium, the only fish food options should be freshwater fish food.
- If the aquarium is a saltwater aquarium, the only fish food options should be marine fish food.

We can present the customer with a list of options for food.

For the freshwater FOOD field: Field tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
FOOD	Which freshwater fish foods would you lik...	FOOD	10	[WATER] = 'Freshwater'	Build	<input type="checkbox"/>
SWFOOD	Which marine saltwater fish foods would ...	FOOD	20	[WATER] = 'Saltwater'	Build	<input type="checkbox"/>

Record 1 of 2

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the first question. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our question is about the type of fish the Customer wants, we can enter a field ID of FOOD.
3. In the **Label/Question** field, enter the question the Customer will need to answer, such as: Which freshwater fish foods would you like?
4. The question does not need be answered; the customer may skip it. Clear the **Required** check box allow the customer to skip the question.
5. To set up logic in the **Display When** field, use the **Build** button to open a dialog box where you can build the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

FISH Group - Fields Tab - Build

The 'Build' dialog box is shown with the following content:

- Buttons: Accept, Reset
- Logic Statement: [WATER] Equals Saltwater
- Preview: [WATER] = 'Saltwater'

- Select the **WATER** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Saltwater” or “Freshwater” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The 'Field Detail' tab is shown with the following configuration options:

- Field ID: FOOD
- Group / Order: FOOD (dropdown), 10
- Label: Which freshwater fish foods would you like
- Line Type: Inventory (dropdown), Allow Qty's (checked)
- Data Type: List (dropdown), Multiple Selections (checked)
- Text Length: (empty)
- Limit To List: (checked)
- Display When: [WATER] = 'Freshwater'
- Help Text: (empty)
- Precision: (empty)
- Min Value: (empty)
- Max Value: (empty)
- Increment: (empty)
- Numeric Warn: (empty)
- Print Group: (empty)
- Default Value: (empty)
- Use Field Price: (empty)
- Field Price: 0.0000
- Price Option: Fixed... (dropdown)
- Required: (checked)
- Long Descr: (empty)
- Smart ID Len: (empty)
- Smart ID Value: (empty)

A 'Build' button is located below the 'Display When' field.

The **Field Detail** tab gives more detail about the selected field. Use the navigation buttons at the bottom of the tab to move from record to record.

1. We have multiple freshwater fish food options in Inventory. We can allow the user to select the Inventory Item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer may order more than one type of fish food, and/or more than a quantity of one, mark the **Allow Qty's** and **Multiple Selections** check boxes.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.

List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.

1. Select an Inventory Item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select a **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.
5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.


6. By default, the **Quantity** of the Item to include in the configuration is 1. We are allowing the Customer to enter a quantity of the selected fish. The number of fish included in the configuration will be the quantity from the List Values tab multiplied by the quantity entered by the Customer.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

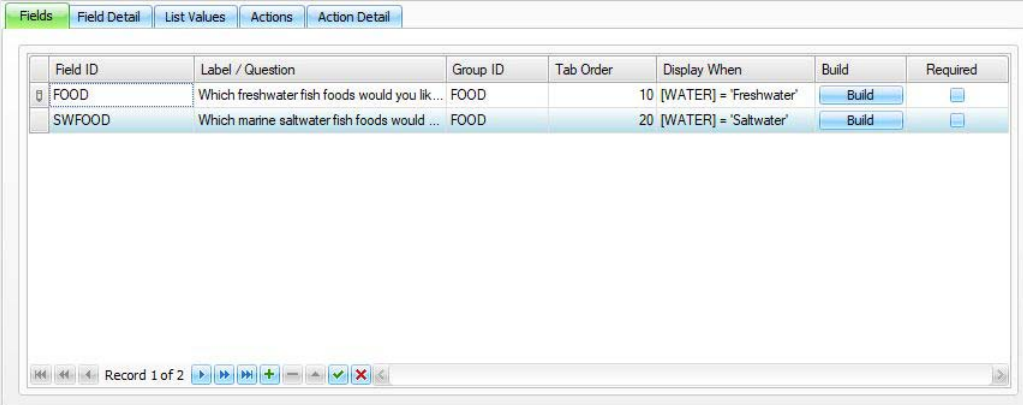
The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we are working with the food field, we only have multiple choices for the accessories, and don't need to have Actions on these accessories.

Use the **Save** button  on the toolbar to save your changes.

For the SWFOOD field:

Field tab



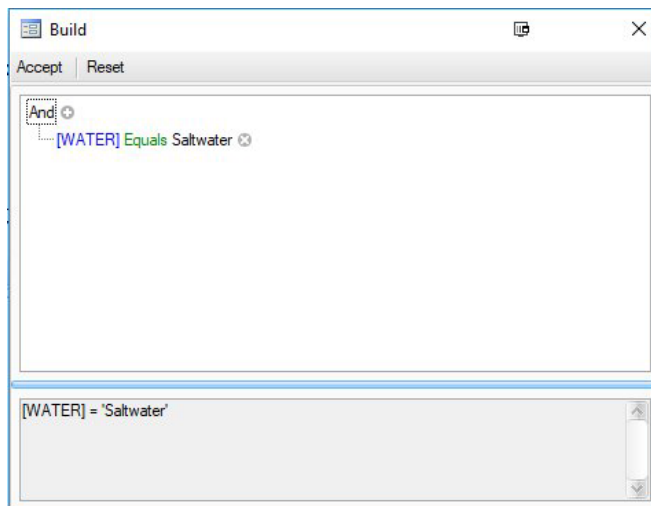
Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
FOOD	Which freshwater fish foods would you lik...	FOOD	10	[WATER] = 'Freshwater'	Build	<input type="checkbox"/>
SWFOOD	Which marine saltwater fish foods would ...	FOOD	20	[WATER] = 'Saltwater'	Build	<input type="checkbox"/>

Record 1 of 2

1. Click in a blank record or use the **Append** button  to add a new record.

2. Enter a **Field ID** for the first question. The Field ID is a short name or identifier for the question, but is not the actual label/question. If our question is about the type of fish the Customer wants, we can enter a field ID of SWFOOD.
3. In the **Label/Question** field, enter the question the Customer will need to answer, such as: Which freshwater fish foods would you like?
4. The question does not need be answered; the customer may skip it. Clear the **Required** check box allow the customer to skip the question.
5. To set up logic in the **Display When** field, use the **Build** button to open a dialog box where you can build the logic statement. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

FISH Group - Fields Tab - Build



- Select the **WATER** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding "Saltwater" or "Freshwater" where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The 'Fields' tab is selected. The configuration for the field 'SWFOOD' is shown. The 'Group / Order' is 'FOOD' with a value of '20'. The 'Label' is 'Which marine saltwater fish foods would you like?'. The 'Line Type' is 'Inventory'. The 'Data Type' is 'List'. The 'Display When' condition is '[WATER] = \'Saltwater\''. The 'Help Text' is empty. The 'Precision' is '0'. The 'Min Value' is '0'. The 'Max Value' is '0'. The 'Increment' is '1'. The 'Numeric Warn' is 'No'. The 'Print Group' is empty. The 'Default Value' is empty. The 'Use Field Price' is 'No'. The 'Field Price' is '0.0000'. The 'Price Option' is 'Fixed...'. The 'Required' checkbox is checked. The 'Long Descr' is empty. The 'Smart ID Len' is '1'. The 'Smart ID Value' is empty. A 'Build' button is visible. Navigation buttons are at the bottom.

The **Field Detail** tab gives more detail about the selected field. Use the navigation buttons at the bottom of the tab to move from record to record.

1. We have multiple saltwater fish food options in Inventory. We can allow the user to select the Inventory Item with their answer to the question.
2. In the **Line Type** field, select **Inventory** from the drop-down list. This means the answer to the question selects an Inventory Item to the configuration.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Because the Customer may order more than one type of fish food, and/or more than a quantity of one, mark the **Allow Qty's** and **Multiple Selections** check boxes.
5. To prevent the Customer from typing an option not in Inventory, mark the **Limit to List** check box.

List Values tab

The screenshot shows the 'List Values' tab in a software application. The tab is active, and the interface is divided into several sections. On the left, there is a list of options under the heading 'Option List'. Two options are visible: 'Marine Saltwater Food Flakes 2.1 oz' and 'Marine Saltwater Food Pellet 8.2 oz'. The 'Marine Saltwater Food Flakes 2.1 oz' option is selected. To the right of the list, there are several input fields and buttons for the selected item. These include: 'Item ID' (AQU5WFDLKS), 'Use Option Price' (checkbox), 'Option Price' (0.0000), 'Location ID' (MN00C), 'Unit' (EA), 'Quantity' (1.0000), 'Smart ID Value' (empty), 'Long Description' (empty), and 'Option Picture' (checkbox). There are also buttons for 'Formula' and 'Media'. At the bottom left, there is a status bar showing 'Record 1 of 2' and navigation icons.

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.


1. Select an Inventory Item for the **Option List** from the drop-down list. The Item details will appear.
2. Accept or select a **Location ID** for the Item.
3. Accept or select the **Unit** of measure for the Item.
4. If you want to associate a media code with the Item, use the **Media** button.
5. If you want to use the Item's Inventory picture, mark the **Use Item Picture** check box. If you want to add a different picture for the option, right-click in the **Image** field and select **Load**.
6. By default, the **Quantity** of the Item to include in the configuration is 1. We are allowing the Customer to enter a quantity of the selected fish. The number of fish included in the configuration will be the quantity from the List Values tab multiplied by the quantity entered by the Customer.
7. Enter a **Long Description** for the option, if applicable.
8. Repeat Steps 1 to 7 for each option in the list.

If you want to override the Inventory price for the Item, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the Item in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we are working with the food field, we only have multiple choices for the accessories, and don't need to have Actions on these accessories.

Use the **Save** button  on the toolbar to save your changes.

Once you finish the configurator maintenance, use the **Validate** button on the toolbar to validate the configuration. You will get a notification window listing corrections, if any, that you need to make before the configuration is valid. Once the corrections, if any, are complete, a window will appear to notify you the configuration has been validated.

Notes:

The configuration above is just an example of how you can set up a Sales Order configuration. This configuration is very simple. You may require a more complex setup, such as a more defined limit of the heater, air pump, and water filter setup.

You may want to use the Variables and Constraints to limit the selections made, or display a message when criteria has been met to display the message. An example of this may be the number of fish in the tank, based on the size of the tank.

Before starting the configuration setup, use the Configuration Worksheet to determine all the possible questions and combinations of questions and available selections for these questions. You will save time in the long run doing thorough planning before setup, instead of having errors or incorrect information in your configurations because of a lack of planning.

If possible use a "test" company to test your configuration setup to make sure you get the results you were planning on getting.

SETTING UP A MANUFACTURING ORDER CONFIGURATION

Because of the amount of flexibility you have when setting up a configuration, this topic will be a tutorial of sorts that will walk you through the process. Refer to the Configurator Basic Functionality section (page 3-13) for more general information about the Configuration Maintenance screen.

Planning the configuration before you do any system entry is essential to understanding how you want the configuration to work. To guide you through the process of creating a Manufacturing Order configuration, we will use a sample configuration. We will walk through the planning, then the system entry for the configuration to help you understand the options available and the results determined by those options.

For a Manufacturing Order configuration, determine what you want to “customize”. For this tutorial, we will configure a lawn mower.

Planning -- Stage 1

Before doing any entries into the system for your configuration, you need to plan what you want to configure, the options you will present to the user, and the pricing scheme you want to use for the configured item.

What can the user configure?

Examples of parts the user can customize:

- How the mower is powered
- Size of the engine, if applicable
- Size of the motor, if applicable
- Size of the battery pack, if applicable
- Size of the deck
- Whether or not to include a bag

What is included in the mower that the user cannot configure?

Examples of parts the user cannot customize but must be included in the configured Item:

- Extension cord, if applicable
- Labor

Do any of the components depend on choices the user makes?

Examples of parts that are included or excluded depending on what the user chooses in a previous question:

- The size of the engine or motor depends on how the mower is powered
- The size of the battery pack depends on the size of the motor
- Include bag
- The size of the rear wheels
- Include extension cord depends on how the mower is powered

How do you want to price the configured mower?

- Straight Inventory pricing--the prices of the configured Items are added together for the final price
- A base price plus individual pricing for the configured Items--if your base price comes from the configuration, determine a default price
- A blanket, or fixed (default), price that does not change no matter what components are selected.
- A combination of Inventory and configuration pricing, with or without formulas.

Other things to consider:

- Will the description of the configured mower change depending on the components? (This is the description and additional description of the final configured mower.)
- Do you want the system to assign an Item number for the configured Item (Auto), or do you want the Item number to reflect some or all of the characteristics of the Item (Smart ID number)?, or built with a Smart ID and a sequence number (so you know how many of that particular configuration have been built)?

Planning -- Stage 2

Stage 2 planning consists of laying out the options for each Item the user is allowed to configure.

In Stage 1, we determined the user can configure:

- How the mower is powered
- Size of the engine, if applicable

- Size of the motor, if applicable
- Size of the battery pack, if applicable
- Size of the deck
- Whether or not to include a bag

List the options we offer:

- Type of power: corded electric, battery electric, gas
- Size of engine as applicable: 125 cc (cannot include bag), 140 cc, 160 cc
- Size of motor as applicable: 10 amp (cannot include bag), 12 amp, 13 amp, 40-volt, 60- volt, 80-volt
- Size of battery pack: 40 volt, 60 volt, 80 volt
- Size of deck: 16" (cord electric only), 17" (battery only), 19", 20" (cord electric only), 21", 24" (gas only)
- 12" rear wheels (gas only)

What do we include and when do we include it with the mower:

- If the mower is gas-powered:
 - bagger
 - large rear wheels
- If the mower is corded electric:
 - extension cord
 - no battery
- If the mower is battery electric
 - battery and charger

Planning -- Stage 3

To keep things simpler for this example, we will use Inventory pricing where available for Inventory Items. The prices of the configured Items are added together for the final price.

Once you have a good idea of how you want to set up the configuration, you can set up the configuration in the system.

Set up - Inventory Items

Before you start setting up the configuration, make sure all the Inventory Items available or required for the configuration are set up in Inventory. Reference the Inventory Training Manual for information on setting up Items.

When you set up a configuration, you will need to choose a base item from Inventory. This is the basic Item you will be configuring. In this case, the base Item is a mower base. The base Item can have its own price, which may become part of the price of the configured Item.

Make sure you have set a Base Price for each of the Items if you want the Inventory price to affect the price of the configured Item.

To view Item costs in the Configurator screens, if you use average costing, make sure you have set an Average cost for each Item. If you use standard costing, make sure you have set a Standard cost for each Item.

The screenshot shows the 'IN Items' window for item 'AQUSWHRDRO'. The 'Costs' tab is active, displaying the following values:


Cost Type	Value
Average	2.9900
Last	2.9900
Base	2.9900
Standard	2.9900

The 'Price Info' tab is also visible, showing the following values:

Unit	Average Price	Base Price	List Price	Minimum Price
EA	7.4900	7.4900	7.9900	6.4900

Red boxes highlight the 'Set an Average cost if you use average costing' and 'Set a Standard cost if you use standard costing' instructions.

Set up - Configurator header

- Open the Configuration Maintenance function from the Configurator Setup and Maintenance menu.
- Create a new configuration by clicking the **New Record** button  on the toolbar.

- Enter a Description for the configuration in the **Config Desc** field. For our example, we will enter LAWNMOWER M1.

Set up - General section

General	
Config Type	Manufacturing Orders
Category ID	Mowers
Base Item ID	MOWER
Customer ID	
Custom Output	
Active From/Thru	9/1/2017 12/31/2018
Config Desc Type	Fixed + Values
Config Item Desc	Lawn mower with deck
Part Number Type	Smart + Sequence
Default Price	0.0000
Base Price From	Inventory
Add Config Price	Inventory w/ Config Override
<input type="checkbox"/> Allow Constraint Violations	

1. Select **Manufacturing Orders** as the **Config Type**.
2. Select an appropriate configuration **Category ID** from the drop-down list.
3. Select the base Item for the configuration from the **Base Item ID** drop-down list.
4. We are not setting this up for a particular customer, so we will leave the **Customer ID** field blank.
5. Select a date range within which the configuration will be active in the **Active From/Thru** fields.
6. The finished configuration will become a new part number. To create a description for the new Item, select **Fixed** in the **Config Desc Type** field. If you want to create a description that will also include the description and additional description of the base Item, select **Fixed + Values**.
7. Enter a description for the configured item in the **Config Item Desc** field.
8. In the **Part Number Type** field, there are 3 options:
 - **Auto**: The system will generate a number for the new Item you configure
 - **Smart**: You will use the **Smart ID** fields on the Field Detail and List Values screens to set up portions of the final part number.
 - **Smart + Sequence**: The Smart part number will have a sequence number added to it. This indicates how many times the configuration has been used to build an Item.

For our example, we will select a **Smart + Sequence** part number.

9. In the **Base Price From** field, there are 3 options:
 - **Inventory**: Prices are based on the prices of Inventory Items.

- **Configuration:** This selection will enable the **Default Price** field. The starting Base Price will be the value in the **Default Price** field.
- **None:** There is no starting base price. Additional pricing may increase the Base Price as the configuration is used.

For our example, we will select **Inventory**, to build the price as we select components of the mower.

10. In the **Add Config Price** field, there are 2 options:

- **Inventory w/ Config Override:** Allows you to add prices to the initial Base Price, if any, by pulling prices for Items from Inventory or from the configuration, whichever is present.
- **None:** Forces the system to use Base Pricing only, so the full and complete price of the configured Item is the **Default Price** if available, or the Inventory price for the base Item. Items added via the configuration will only contribute to cost, not price.

For our example, we will select **Inventory w/ Config Override**.

11. Mark the **Allow Constraint Violations** check box to allow constraint violations to be overridden when answering questions during the order generation. Clear the check box to apply the constraint violation rules that can't be overridden.

Set up - Groups section

Group ID	Tab Order	Description
POWER	10	Power group - Elec, Gas, Recharable Battery
DECK	20	Deck Width Group
ENGMT	25	Engine or Motor size
OPTNS	30	Accessories Group

Record 1 of 4

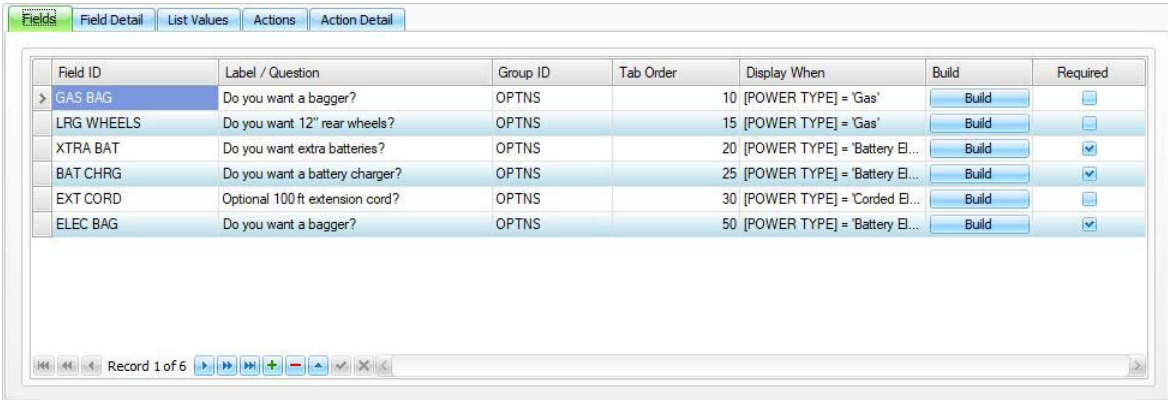
The Groups section allows you to create different groupings of questions. Each Group can focus on one aspect of the product--each Group has its own list of questions. In our example, the user can configure how the mower is powered, the size of the motor or engine, the size of the battery pack, the size of the deck, and whether or not to include a bag.

We can split these options up logically into groups: POWER, DECK, ENGMT, and OPTNS.

1. Click in a blank record or use the **Append** button  to create a new **Group ID**.
2. Enter up to 5 characters for the **Group ID**.

3. The **Tab Order** defines the sequence in which the groups will be presented to the user. To reorder the groups, edit the Tab Order.
4. Enter a **Description** for the group.

Set up - Tabs section



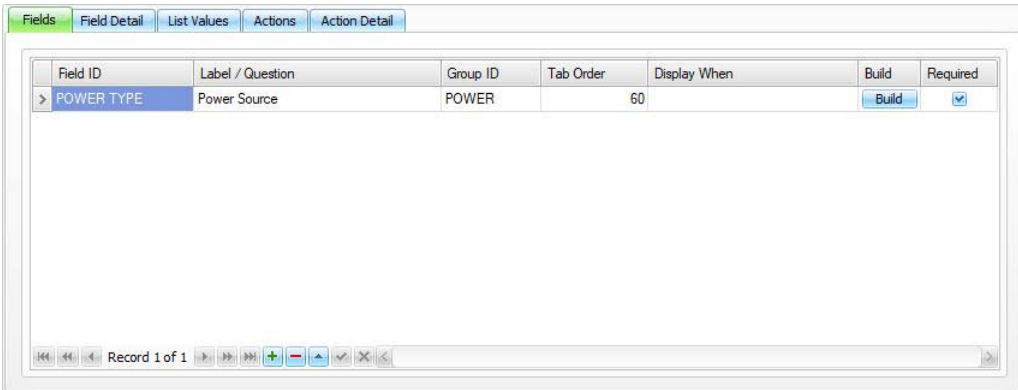
The screenshot shows the 'Fields' tab with a table of configuration fields. The table has columns for Field ID, Label / Question, Group ID, Tab Order, Display When, Build, and Required. The data is as follows:

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input type="checkbox"/>
LRG WHEELS	Do you want 12" rear wheels?	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery El...	Build	<input checked="" type="checkbox"/>
BAT CHRГ	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery El...	Build	<input checked="" type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded El...	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery El...	Build	<input checked="" type="checkbox"/>

The Tabs section defines the question and answer flow, pricing, quantity determination, etc. The Tabs section determines how the configuration works.

Each group has its own list of labels/questions, so the process of setting up each field must be repeated for each group.

POWER Group



The screenshot shows the 'Fields' tab with a table of configuration fields for the 'POWER' group. The table has columns for Field ID, Label / Question, Group ID, Tab Order, Display When, Build, and Required. The data is as follows:

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> POWER TYPE	Power Source	POWER	60		Build	<input checked="" type="checkbox"/>

In our example, the POWER group questions will be presented to the user first (Tab Order = 10). Select the POWER group in the Groups section.

In review:

With regard to lawn mower power, the user can configure:

- How the mower is powered
- Size of the engine, if applicable
- Size of the motor, if applicable
- Size of the battery pack, if applicable

We have a few conditions to consider:


- If the mower has a gas engine, there are three engine size options.
- If the mower has a gas engine, there is an option to have large rear wheels
- If the mower has a corded electric motor, there are three motor amperage options.
- If the mower has a corded electric motor, non-configured items are included: extension cord.
- If the mower has a battery electric motor, there are three motor voltage options.
- If the mower has a battery electric motor, there are three battery pack options.

We can present the Customer with a list of options for the mower power source.

Field tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> POWER TYPE	Power Source	POWER	60		Build	<input checked="" type="checkbox"/>

Record 1 of 1

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the first question. The Field ID is a short name or identifier for the question, but is not the actual Label/Question. If our first question is about the mower power source, we can enter a Field ID of POWER TYPE.

3. In the **Label/Question** field, enter the Label/Question to which the user will need to respond, such as: Select the mower's power source.
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the user will answer the question.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The 'Field ID' is 'POWER TYPE'. The 'Group / Order' is 'POWER' with a value of '60'. The 'Label' is 'Power Source'. The 'Line Type' is 'Information'. The 'Data Type' is 'List'. The 'Text Length' is empty. The 'Display When' is empty. The 'Help Text' is empty. The 'Precision' is '0'. The 'Min Value' is '0'. The 'Max Value' is '0'. The 'Increment' is empty. The 'Numeric Warn' is empty. The 'Print Group' is empty. The 'Default Value' is empty. The 'Use Field Price' is empty. The 'Field Price' is '0.0000'. The 'Price Option' is 'Fixed'. The 'Required' checkbox is checked. The 'Long Descr' is empty. The 'Smart ID Len' is '2'. The 'Smart ID Value' is empty. There are navigation buttons at the bottom.

The **Field Detail** tab gives more detail about the selected field. Use the navigation buttons at the bottom of the tab to move from record to record.

For the **POWER TYPE** field:

1. We have three options for power. We can allow the user to select the option they want to build.
2. In the **Line Type** field, select **Information** from the drop-down list. This means the answer to the question is information only. We will use this information later to determine other options.
3. To present a list of options to the Customer, select **List** from the **Data Type** drop-down list.
4. Only one option is allowed per mower configuration. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
5. To prevent the user from typing an option not in the list, mark the **Limit to List** check box.
6. Enter a **Long Description** for the field detail, if applicable.

List Values tab


The **List Values** tab is where you create the list of options for the user if you set your **Data Type** on the **Field Detail** tab to **List**. If you set your **Line Type** on the **Field Detail** tab to **Information**, you will enter a list of options for the user that may determine other options that may be available.

1. Enter an option in the **Option List** field.
2. If you want to associate a media code with the option, use the **Media** button.
3. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
4. Enter a **Long Description** for the option, if applicable.
5. Repeat Steps 1 to 4 for each option in the list.

Actions tab

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we are working with the POWER TYPE field, and the power source selected for the mower determines which Items are assumed to be included in the configuration (spark plug, gas tank, pull-start clutch, on-off switch), we will have no Actions for this Field.

Use the **Save** button  on the toolbar to save your changes.

DECK Group

In our example, the DECK group questions will be presented to the user second (Tab Order = 20). Select the DECK group in the Groups section.

In review:

With regard to the DECK group, the user can choose:

- Size of the deck
- The deck sizes vary depending on the POWER TYPE

List the options we offer:

- Size of deck: 16", 17", 19", 20", 21", 24"

We have a few conditions to consider:

- The deck size varies for the type of power source
 - Gas - 19", 21", or 24"
 - Battery Electric - 17", 19", or 21"
 - Corded Electric - 16", 20", or 21"

Field tab

Fields

Field Detail

List Values

Actions

Action Detail

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS DECK WIDTH	Do you want a 19, 21 or 24 inch deck?	DECK	10	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
BAT DECK WIDTH	Do you want a 17, 19 or 21 iinch deck?	DECK	20	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
CRD DECK WIDTH	Do you want a 16, 20 or 21 iinch deck?	DECK	30	[POWER TYPE] = 'Corded Electric'	Build	<input checked="" type="checkbox"/>

Record 1 of 3

1. Click in a blank record or use the **Append** button  to add a new record.

2. Enter a **Field ID** for the first question. The Field ID is a short name or identifier for the question, but is not the actual Label/Question. If our question is about the mower deck size, we need to remember the 16" deck can only be configured with a corded electric motor, and the 24" deck can only be configured with a gas motor. The 21" deck can be configured with all types of power source. We need to add three field IDs: GAS DECK WIDTH, BAT DECK WIDTH, and CRD DECK WIDTH.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: Do you want a 19, 21 or 24 inch deck?, Do you want a 17, 19 or 21 inch deck?, and Do you want a 16, 20 or 21 inch deck?
4. The question must be answered; the Customer cannot skip it. Mark the **Required** check box to ensure the customer will answer the question.
5. Each question can have only one list of options, so we will need three questions, one that will have deck size applicable to mowers with gas engines, battery electric motors, and corded electric motors. We want to show each question dependent on whether if the user selects a gas engine, a battery electric motor, or corded electric motor as a power source, therefore we will need to specify when the question will be displayed.
6. To set up logic in the **Display When** field, we can specify the question that will appear when the POWER TYPE selection is made. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

DECK Group - Fields Tab - Build

Build

Accept Reset

And

[POWER TYPE] Equals Gas

[POWER TYPE] = 'Gas'

Build

Accept Reset

And

[POWER TYPE] Equals Corded Electric

[POWER TYPE] = 'Corded Electric'

- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

GAS DECK WIDTH Field Detail tab

BAT DECK WIDTH

Fields				Field Detail				List Values				Actions				Action Detail			
Field ID		BAT DECK WIDTH						Precision		0 G		Default Value							
Group / Order		DECK		20		Min Value		0 G		Use Field Price				Field Price		0.0000		Picture	
Label		Do you want a 17, 19 or 21 inch deck ?						Max Value		0 G		Price Option		Fixe... G		Media			
Line Type		Action		Allow Qty's		Increment		G		Numeric Warn				Required		<input checked="" type="checkbox"/>		Long Descr	
Data Type		List		Multiple Selections		Print Group				Build				Smart ID Len		2 G		Smart ID Value	
Text Length				Limit To List		<input checked="" type="checkbox"/>													
Display When		[POWER TYPE] = 'Battery Electric'																	
Help Text																			

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CRD DECK WIDTH

Fields				Field Detail				List Values				Actions				Action Detail			
Field ID		CRD DECK WIDTH						Precision		0 G		Default Value							
Group / Order		DECK		30		Min Value		0 G		Use Field Price				Field Price		0.0000		Picture	
Label		Do you want a 16, 20 or 21 inch deck ?						Max Value		0 G		Price Option		Fixe... G		Media			
Line Type		Action		Allow Qty's		Increment		G		Numeric Warn				Required		<input checked="" type="checkbox"/>		Long Descr	
Data Type		List		Multiple Selections		Print Group				Build				Smart ID Len		2 G		Smart ID Value	
Text Length				Limit To List		<input checked="" type="checkbox"/>													
Display When		[POWER TYPE] = 'Corded Electric'																	
Help Text																			

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The **Field Detail** tab gives more detail about the selected field. Use the navigation buttons at the bottom of the tab to move from record to record.

1. In the **Line Type** field, select **Action** from the drop-down list. This means the answer to the question will consume Inventory.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will select only one deck size. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.

5. Enter a **Long Description** for the field detail, if applicable.

GAS DECK WIDTH List Values tab

The screenshot shows the 'List Values' tab in a software interface. On the left, an 'Option List' contains three entries: '19" Mower Deck' (selected), '21" Mower Deck', and '24" Mower Deck'. Below the list is a record navigation bar showing 'Record 1 of 3'. The right side of the interface contains several input fields: 'Item ID' (empty), 'Use Option Price' (checked), 'Option Price' (0.0000), 'Location ID' (empty), 'Unit' (empty), 'Quantity' (empty), 'Smart ID Value' (19), and 'Long Description' (empty). A 'Media' button is located next to the 'Unit' field. On the far right, an 'Option Picture' section shows 'No image data'.

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

BAT DECK WIDTH

The screenshot shows the 'List Values' tab in a software interface. On the left, an 'Option List' contains three entries: '17" Mower Deck' (selected), '19" Mower Deck', and '21" Mower Deck'. Below the list is a record navigation bar showing 'Record 1 of 3'. The right side of the interface contains several input fields: 'Item ID' (empty), 'Use Option Price' (checked), 'Option Price' (0.0000), 'Location ID' (empty), 'Unit' (empty), 'Quantity' (empty), 'Smart ID Value' (17), and 'Long Description' (empty). A 'Media' button is located next to the 'Unit' field. On the far right, an 'Option Picture' section shows 'No image data'.

CRD DECK WIDTH

1. Enter an option for the **Option List**. Since the list values are not tied directly to Inventory, you cannot select specific Inventory Items for the list.
2. If you want to associate a media code with the Item, use the **Media** button.
3. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
4. Enter a **Smart ID Value** for each option. This will then be incorporated into the Smart ID number of the configured Item.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

GAS DECK WIDTH Actions tab

Fields

Field Detail

List Values

Actions

Action Detail

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	19" Mowe...	Add Material	TOD19401	
With Value	20	21" Mowe...	Add Material	TOD21402	
With Value	30	24" Mowe...	Add Material	TOD24404	

Record 1 of 3

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more Actions on the Actions tab.

We were not able to add Inventory Items to the Option List, so we will associate each option with an Inventory Item on the Actions tab.

BAT DECK WIDTH

FieldsField DetailList ValuesActionsAction Detail

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	17" Mowe...	Add Material	GW17MD	
With Value	20	19" Mowe...	Add Material	GW19MD	
With Value	30	21" Mowe...	Add Material	GW19MD	

Record 1 of 3


CRD DECK WIDTH

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	16" Mowe...	Add Material	GW16MD	
With Value	20	20" Mowe...	Add Material	GW20MD	
With Value	30	21" Mowe...	Add Material	GW21MD	

Record 1 of 3

The **Value** field drop-down list includes the options you created, as well as an **Any Value** option. If the action happens only when a certain option is selected, choose that option from the drop-down list. If the action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which deck option the user selects, we need to create actions to add the specific mower deck option to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**, accept this default value.
3. The **Sequence** number determines the order in which the actions take place.
4. Select a list option from the **Value** drop-down list.
5. For the **Action Type**, select **Add Material** to add an Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration that goes with that size and type of mower deck.
7. Repeat steps 1 through 6 to enter all the mower deck choices.

GAS DECK WIDTH Action Detail tab

Fields	Field Detail	List Values	Actions	Action Detail
Component ID	TOD19401		Use Override Price	<input type="checkbox"/>
Location ID	MN0001		Override Price	0.0000 <input type="button" value="Formula"/>
Detail Type	Material		Quantity	1.0000 <input type="button" value="Formula"/>
BOM Rev No			Scrap Percent	0.00
Usage Type	Per Assembly		Unit	EA
Cost Group	Matl		Unit Cost	39.9900
Media Group			Total Qty	1.0000
			Total Cost	39.9900
				Notes

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

BAT DECK WIDTH

Fields	Field Detail	List Values	Actions	Action Detail
Component ID	GW17MD		Use Override Price	<input type="checkbox"/>
Location ID	MN0001		Override Price	0.0000 <input type="button" value="Formula"/>
Detail Type	Material		Quantity	1.0000 <input type="button" value="Formula"/>
BOM Rev No			Scrap Percent	0.00
Usage Type	Per Assembly		Unit	EA
Cost Group	Matl		Unit Cost	29.9900
Media Group			Total Qty	1.0000
			Total Cost	29.9900
				Notes

CRD DECK WIDTH

The screenshot shows the 'Action Detail' tab with the following data:

Component ID	GW16MD	Use Override Price	<input checked="" type="checkbox"/>
Location ID	MN0001	Override Price	0.0000
Detail Type	Material	Quantity	1.0000
BOM Rev No		Scrap Percent	0.00
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	29.9900
Media Group		Total Qty	1.0000
		Total Cost	29.9900

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly:** The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty:** The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed:** The configuration will consume the Item as necessary for the assemblies built.


Select the **Usage Type** for the Item.

6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the quantity via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.
9. Enter a **Scrap Percentage**, as applicable.

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10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

Use the **Save** button  on the toolbar to save your changes.

ENGMT Group

In our example, the ENGMT group questions will be presented to the user third (Tab Order = 25). Select the ENGMT group in the Groups section.

In review:

With regard to the ENGMT group, the user can choose:

- Size of the motor or engine
- The engine or motor sizes vary depending on the POWER TYPE

List the options we offer:

- Size of engine: 125cc, 140cc, and 160cc
- Size of the battery powered motor: 40V, 60V, and 80V
- Size of the corded electric motor: 10 Amp, 12 Amp, and 13 Amp


We have a few conditions to consider:

- The motor size varies for the type of power source and deck size

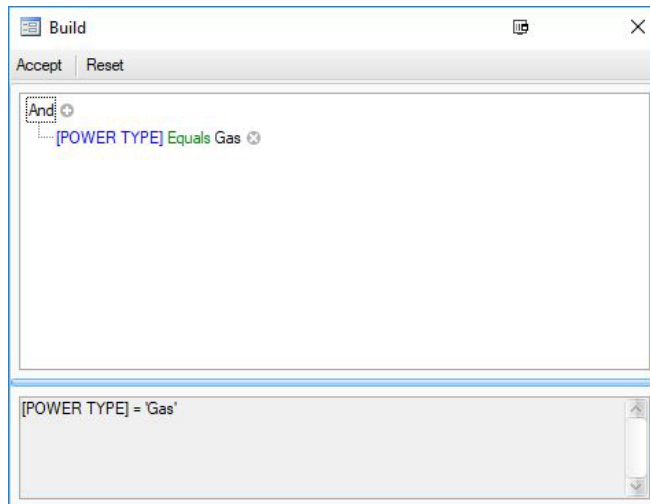
Field tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
BAT MOTOR SIZE	What size battery motor do you want?	ENGMT	10	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
ENGINE SIZE	What size gas engine do you want?	ENGMT	20	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
> CRD MOTOR SIZE	What size corded motor do you want?	ENGMT	30	[POWER TYPE] = 'Corded Electric'	Build	<input checked="" type="checkbox"/>

Record 3 of 3

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about the engine size for the mower, we can enter a field ID of ENGINE SIZE.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: What size gas engine do you want?
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the Customer will answer the question.
5. Each question can have only one list of options. We don't want to show this question if the user selects an electric motor as a power source, so we will need to specify when the question will be displayed.
6. For the ENGINE Display When, we can specify that the question will only appear if the POWER TYPE is equal to 'Gas'. To set up logic in the **Display When** field, we can specify the question that will appear when the POWER TYPE selection is made. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

ENGMT Group - Fields Tab - Build



- Select the **POWER TYPE** group from the **blue** selection option.
- Select **Equals** from the **green** filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.

- Once you have entered your logic statement click Accept to save the Build statement.

Field Detail tab

1. We have multiple engine sizes in inventory, but we do not have the option to set the **Line Type** field to Inventory for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will only use one engine. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. Enter a **Long Description** for the field detail, if applicable.
6. To add an indicator for the engine to the **Smart ID** for the configured Item, enter a length for the engine segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The screenshot shows the 'List Values' tab of a software application. The interface includes a tabbed menu at the top with 'Fields', 'Field Detail', 'List Values' (selected), 'Actions', and 'Action Detail'. On the left, there is a tree view under 'Option List' with three items: '125CC Gas Engine' (selected), '140CC Gas Engine', and '160CC Gas Engine'. Below this is a list of records, currently showing 'Record 1 of 3'. The main area contains several input fields: 'Item ID' (empty), 'Use Option Price' (checkbox, unchecked), 'Option Price' (text box with '0.0000'), 'Location ID' (text box with a magnifying glass icon), 'Unit' (text box with a magnifying glass icon and a 'Media' button), 'Quantity' (text box), 'Smart ID Value' (text box with '125'), and 'Long Description' (text area). On the right, there is an 'Option Picture' section with a 'Use Item Picture' checkbox and a large image placeholder area displaying 'No image data'. At the bottom left, there are navigation buttons and a status bar showing 'Record 1 of 3'.

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. Because the list values are not tied directly to Inventory, you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the engine size for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	125CC Ga...	Add Material	BS125CC	
With Value	20	140CC Ga...	Add Material	BS140CC	
With Value	30	160CC Ga...	Add Material	BS160CC	


Record 1 of 3

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more Actions on the Actions tab.

We were not able to add Inventory Items to the option list, therefore we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which engine option the user selects, we need to create actions to add the specific engine to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**, accept the default.
3. The **Sequence** number determines the order in which the Actions take place.
4. Select a list option from the **Value** drop-down list. For the first action, we will select the 125 CC Gas engine.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses an engine size.
7. Repeat Steps 1 through 6 for each option.

Action Detail tab

The screenshot shows the 'Action Detail' tab with the following fields and values:

Field	Value	Field	Value
Component ID	BS125CC	Use Override Price	<input type="checkbox"/>
Location ID	MN0001	Override Price	0.0000
Detail Type	Material	Quantity	1.0000
BOM Rev No		Scrap Percent	0.00
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	39.9900
Media Group		Total Qty	1.0000
		Total Cost	39.9900

There are also 'Formula' buttons next to the Override Price, Quantity, and Unit Cost fields. A 'Notes' section on the right contains the text: 'Use with 19" and 21" mower decks.'

The **Action Detail** tab is a detailed extension of the **Actions** tab. Each action on the **Actions** tab has one action on the **Action Detail** tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly**: The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty**: The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed**: The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the item.


6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the quantity via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

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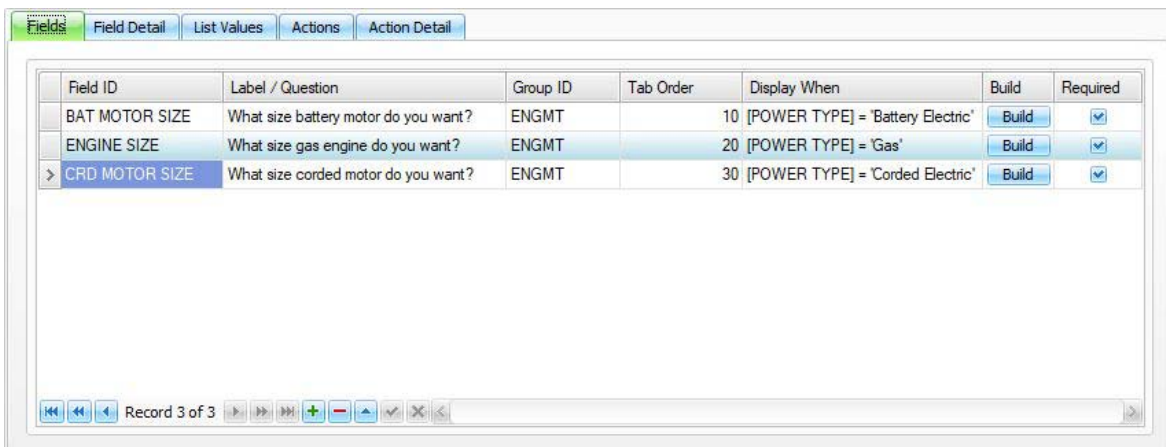
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9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.


Use the **Save** button  on the toolbar to save your changes.

For the BAT MOTOR SIZE field: Field tab



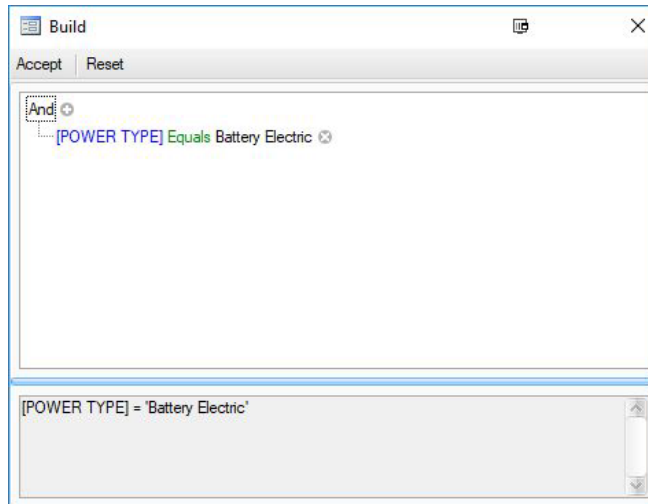
Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
BAT MOTOR SIZE	What size battery motor do you want?	ENGMT	10	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
ENGINE SIZE	What size gas engine do you want?	ENGMT	20	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
> CRD MOTOR SIZE	What size corded motor do you want?	ENGMT	30	[POWER TYPE] = 'Corded Electric'	Build	<input checked="" type="checkbox"/>

Record 3 of 3

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about the motor size for an battery electric-powered mower, we can enter a field ID of BAT MOTOR SIZE.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: What size battery motor do you want?
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the user will answer the question.
5. Each question can have only one list of options. We don't want to show this question if the user selects a gas engine or a corded electric motor as a power source, so we will need to specify when the question will be displayed.

6. For the BAT MOTOR SIZE **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Battery electric'. To set up logic in the **Display When** field, we can specify the question that will appear when the POWER TYPE selection is made. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

ENGMT Group - Fields Tab - Build



- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The 'Field ID' is 'BAT MOTOR SIZE'. The 'Group / Order' is 'ENGMT' with a value of '10'. The 'Label' is 'What size battery motor do you want?'. The 'Line Type' is 'Action' and 'Allow Qty's' is checked. The 'Data Type' is 'List' and 'Multiple Selections' is checked. The 'Text Length' is empty and 'Limit To List' is checked. The 'Display When' is '[POWER TYPE] = 'Battery Electric''. The 'Help Text' is empty. The 'Precision' is '0', 'Min Value' is '0', 'Max Value' is '0', and 'Increment' is '1'. The 'Numeric Warn' is checked. The 'Print Group' is empty. The 'Default Value' is empty. The 'Use Field Price' is checked. The 'Field Price' is '0.0000'. The 'Price Option' is 'Fixe...'. The 'Required' is checked. The 'Long Descr' is 'Use the 40V motor for 17" and 19" mower decks. Use the 60V motor for 19" and 21" mower decks. Use the 80V'. The 'Smart ID Len' is '3' and 'Smart ID Value' is empty. A 'Build' button is visible.

1. We have multiple motor sizes in Inventory, but we do not have the option to set the **Line Type** field to Inventory for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will only use one motor. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. Enter a **Long Description** for the field detail, if applicable.
6. To add an indicator for the motor to the Smart ID for the configured Item, enter a length for the motor segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The screenshot shows the 'List Values' tab of a software application. The interface includes a tab bar at the top with 'Fields', 'Field Detail', 'List Values' (selected), 'Actions', and 'Action Detail'. On the left, there is a list box titled 'Option List' containing three entries: '40V Battery Motor' (selected), '60V Battery Motor', and '80V Battery Motor'. Below this list is a text area for 'Long Description'. To the right of the list, there are several input fields: 'Item ID', 'Use Option Price' (a checkbox), 'Option Price' (a text field with '0.0000'), 'Location ID', 'Unit', 'Quantity', 'Smart ID Value' (a text field with '40V'), and 'Long Description'. There are also buttons for 'Formula' and 'Media'. On the far right, there is a section titled 'Option Picture' with a checkbox 'Use Item Picture' and a large area displaying 'No image data'. At the bottom left, there are navigation buttons and a status bar indicating 'Record 1 of 3'.

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. Because the list values are not tied directly to Inventory, you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the motor size for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	40V Batte...	Add Material	GW40VM	
With Value	20	60V Batte...	Add Material	GW60VM	
With Value	30	80V Batte...	Add Material	GW80VM	
Before Field	40		Display Message		Use the 40V motor for 17" and 19" mower decks. Use the 60V ...


Record 1 of 4

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more Actions on the Actions tab.

Since we were not able to add Inventory Items to the Option List, we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which motor option the user selects, we need to create Actions to add the specific motor to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**, accept this default.
3. The **Sequence** number determines the order in which the actions take place.
4. Select a list option from the **Value** drop-down list. For the first action, we will select the 40V Battery Motor.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses an motor size.
7. Repeat Steps 1 through 6 for each option.

Action Detail tab

The screenshot shows the 'Action Detail' tab with the following fields and values:

Field	Value	Field	Value
Component ID	GW40VM	Use Override Price	<input type="checkbox"/>
Location ID	MN0001	Override Price	0.0000
Detail Type	Material	Quantity	1.0000
BOM Rev No		Scrap Percent	0.00
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	29.9900
Media Group		Total Qty	1.0000
		Total Cost	29.9900

Additional features include 'Formula' buttons next to the Override Price, Quantity, and Unit Cost fields, and a 'Notes' text area on the right.

The **Action Detail** tab is a detailed extension of the **Actions** tab. Each action on the **Actions** tab has one action on the **Action Detail** tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly**: The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty**: The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed**: The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the Item.


6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the quantity via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

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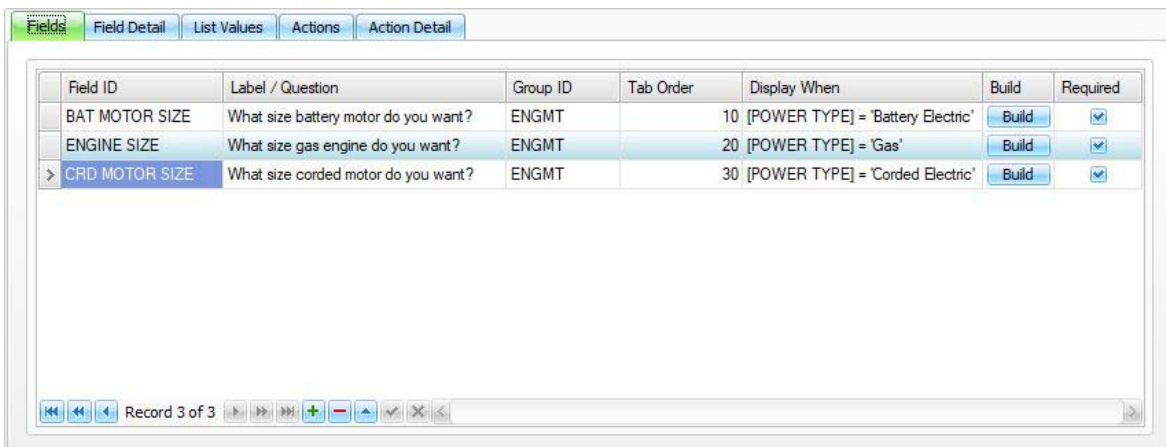
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9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the Item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.


Use the **Save** button  on the toolbar to save your changes.

For the **CORD MOTOR SIZE** field: Field tab



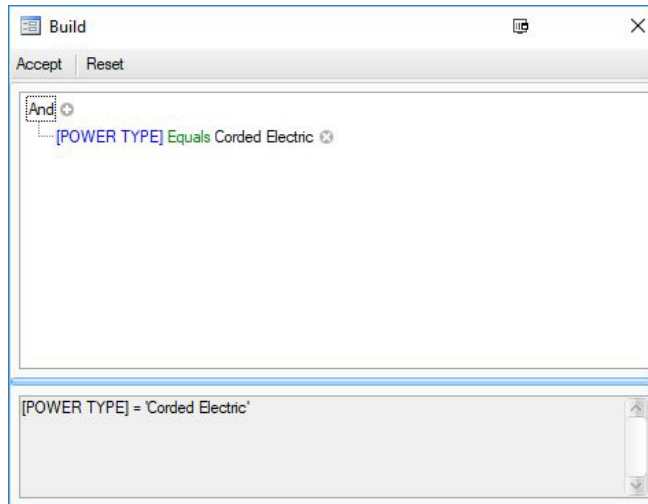
Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
BAT MOTOR SIZE	What size battery motor do you want?	ENGMT	10	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
ENGINE SIZE	What size gas engine do you want?	ENGMT	20	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
> CORD MOTOR SIZE	What size corded motor do you want?	ENGMT	30	[POWER TYPE] = 'Corded Electric'	Build	<input checked="" type="checkbox"/>

Record 3 of 3

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about the motor size for a corded electric-powered mower, we can enter a field ID of CORD MOTOR SIZE.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: What size corded motor do you want?
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the user will answer the question.
5. Each question can have only one list of options. We don't want to show this question if the user selects a gas engine or a corded electric motor as a power source, so we will need to specify when the question will be displayed.

6. For the CRD MOTOR SIZE **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Corded electric'. To set up logic in the **Display When** field, we can specify the question that will appear when the POWER TYPE selection is made. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

ENGMT Group - Fields Tab - Build



- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding "Gas", "Battery Electric", or "Corded Electric" where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

1. We have multiple motor sizes in Inventory, but we do not have the option to set the **Line Type** field to Inventory for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will only use one motor. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. Enter a **Long Description** for the field detail, if applicable.
6. To add an indicator for the motor to the Smart ID for the configured Item, enter a length for the motor segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The screenshot shows a software configuration window with a tabbed interface. The 'List Values' tab is selected. On the left, there is a list box titled 'Option List' containing three items: '10 Amp Corded Motor', '12 Amp Corded Motor', and '13 Amp Corded Motor'. The '12 Amp Corded Motor' is currently selected. Below the list box are navigation buttons and a status indicator showing 'Record 1 of 3'. To the right of the list box, there are several input fields and checkboxes: 'Item ID' (empty), 'Use Option Price' (checkbox), 'Option Price' (text field with '0.0000'), 'Location ID' (text field), 'Unit' (text field), 'Quantity' (text field), 'Smart ID Value' (text field with '10A'), and 'Long Description' (text area). There are also 'Formula' buttons next to the 'Option Price' and 'Unit' fields. On the far right, there is a section titled 'Option Picture' with a checkbox 'Use Item Picture' and a large image placeholder area that currently displays 'No image data'. A 'Media' button is located below the 'Unit' field.

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. Because the list values are not tied directly to Inventory, you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the motor size for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	10 Amp Corded Motor	Add Material	GW10AMPMOT	
With Value	20	12 Amp Corded Motor	Add Material	GW12AMPMOT	
With Value	30	13 Amp Corded Motor	Add Material	GW13AMPMOT	


Record 1 of 3

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more Actions on the Actions tab.

Since we were not able to add Inventory Items to the Option List, we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which motor option the user selects, we need to create Actions to add the specific motor to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**, accept this default.
3. The **Sequence** number determines the order in which the actions take place.
4. Select a list option from the **Value** drop-down list. For the first action, we will select the 10 Amp Corded Motor.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses an motor size.
7. Repeat Steps 1 through 6 for each option.

Action Detail tab

Fields			
Component ID	GW10AMPOT	Use Override Price	<input type="checkbox"/>
Location ID	MN0001	Override Price	0.0000 <input type="button" value="Formula"/>
Detail Type	Material	Quantity	1.0000 <input type="button" value="Formula"/>
BOM Rev No		Scrap Percent	0.00 <input type="button" value="Formula"/>
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	20.9900
Media Group		Total Qty	1.0000
		Total Cost	20.9900

Notes: Use with 16" mower deck.

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly**: The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty**: The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed**: The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the Item.


6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the quantity via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.
9. Enter a **Scrap Percentage**, as applicable.

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10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Use the **Save** button  on the toolbar to save your changes.

OPTNS Group

In our example, the OPTNS group questions will be presented to the user fourth (Tab Order = 30). Select the OPTNS group in the Groups section.

In review:

With regard to the OPTNS group, the user can choose:

- Whether or not to include a bag
- If they want to have large rear wheels on their gas mower
- If they want extra batteries and charger
- If they want to include an extension cord with a corded electric mower

We have a few conditions to consider:


- If the 19" gas mower deck and engine is selected, we cannot include bag
- The large rear wheels are only available for gas powered mowers

GAS BAG Field ID

Field tab

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
LRG WHEELS	What size rear wheels do you want 6" or...	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
BAT CHRG	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery Electric'	Build	<input type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded Electric'	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery Electri...	Build	<input checked="" type="checkbox"/>

Record 1 of 6

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about a bagger for the mower, we can enter a field ID of GAS BAG.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: Do you want a bagger?
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the Customer will answer the question.
5. Each question can have only one list of options. We don't want to show this question if the user selects an gas engine as a power source, so we will need to specify when the question will be displayed.
6. For the GAS BAG **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Gas' AND the deck size is not equal to 19". To set up logic in the **Display When** field, we can specify the question that will appear when the POWER TYPE selection is made. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

OPTNS Group - Fields Tab - Build

- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.
- Click the Plus next to And to add another filter.
- Select the **GAS DECK WIDTH** group from the blue selection option.
- Select **Does not equal** from the green filter type selection option.
- Select “19” Mower Deck” from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The 'Field ID' is 'GAS BAG'. The 'Group / Order' is 'OPTNS' with a value of '10'. The 'Label' is 'Do you want a bagger?'. The 'Line Type' is 'Action'. The 'Data Type' is 'List'. The 'Text Length' is empty. The 'Display When' condition is '[POWER TYPE] = 'Gas''. The 'Help Text' is empty. The 'Precision' is '0', 'Min Value' is '0', 'Max Value' is '0', and 'Increment' is '1'. The 'Numeric Warn' checkbox is checked. The 'Print Group' is empty. The 'Default Value' is empty. The 'Use Field Price' checkbox is checked. The 'Field Price' is '0.0000'. The 'Price Option' is 'Fixed'. The 'Required' checkbox is checked. The 'Long Descr' is empty. The 'Smart ID Len' is '2' and the 'Smart ID Value' is empty. There are buttons for 'Picture', 'Media', and 'Build'.

1. We have multiple bagger sizes in Inventory, but we do not have the option to set the **Line Type** field to Inventory for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will only use one bagger. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. Enter a **Long Description** for the field detail, if applicable.
6. To add an indicator for the bagger to the Smart ID for the configured Item, enter a length for the bagger segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. Because the list values are not tied directly to Inventory, you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the motor size for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	21" Bag	Add Material	MBAG21	
With Value	20	24" Bag	Add Material	MBAG24	
With Value	30	None	Add Material	NOBAG	


Record 1 of 3

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more Actions on the Actions tab.

Since we were not able to add Inventory Items to the Option List, we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which motor option the user selects, we need to create Actions to add the specific motor to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**, accept this default.
3. The **Sequence** number determines the order in which the actions take place.
4. Select a list option from the **Value** drop-down list. For the first action, we will select the 10 Amp Corded Motor.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses an motor size.
7. Repeat Steps 1 through 6 for each option.

Since there is a choice to have no bagger when the question is answered, for this example we set up a Service Item in Inventory as NOBAG with no cost or price. We added this as an Action so it will be listed in the parts to inform the warehouse to not include a bagger.

Action Detail tab

Fields	Field Detail	List Values	Actions	Action Detail
Component ID	MBAG21		Use Override Price	<input type="checkbox"/>
Location ID	MN0001		Override Price	0.0000 <input type="button" value="Formula"/>
Detail Type	Material		Quantity	1.0000 <input type="button" value="Formula"/>
BOM Rev No			Scrap Percent	0.00
Usage Type	Per Assembly		Unit	EA
Cost Group	Matl		Unit Cost	12.9500
Media Group			Total Qty	1.0000
			Total Cost	12.9500

Notes

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly:** The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty:** The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed:** The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the Item.


6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.

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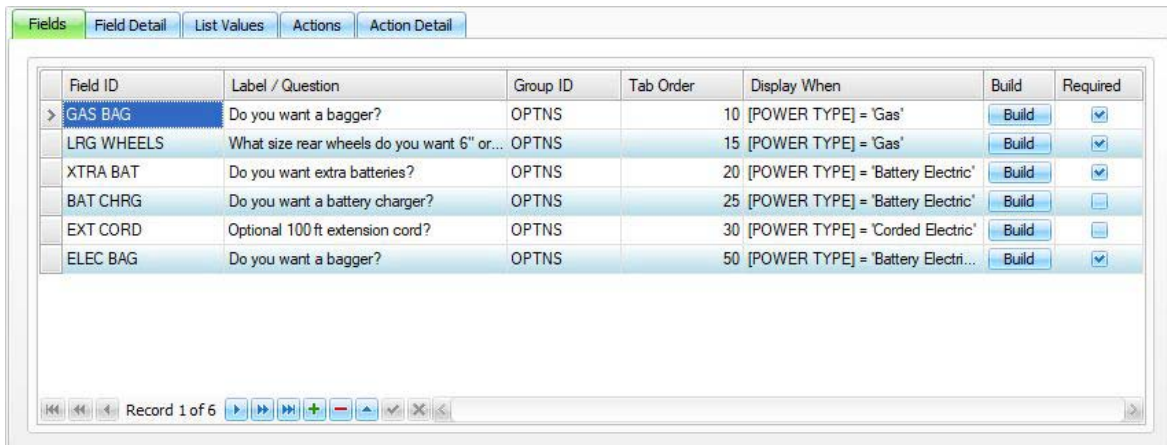
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the quantity via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.
9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the Item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Use the **Save** button  on the toolbar to save your changes.


LRG WHEELS Field ID

Field tab



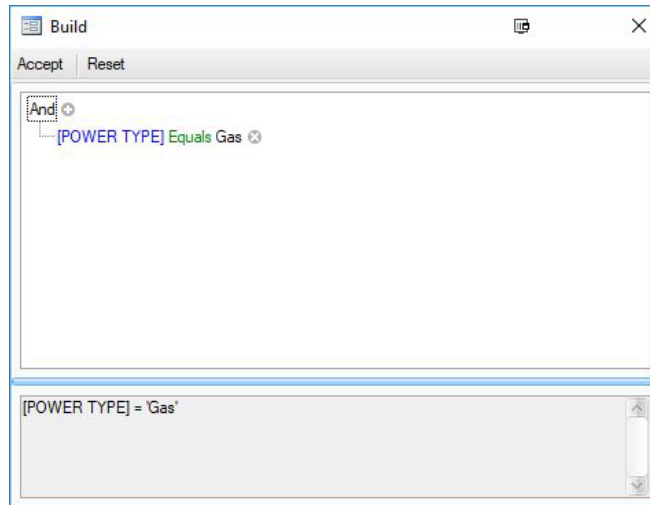
Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
LRG WHEELS	What size rear wheels do you want 6" or...	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
BAT CHRG	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery Electric'	Build	<input type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded Electric'	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery Electri...	Build	<input checked="" type="checkbox"/>

Record 1 of 6

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about a bagger for the mower, we can enter a field ID of LRG WHEELS.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: What size rear wheels do you want 6" or 12"?
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the Customer will answer the question.

5. Each question can have only one list of options. We don't want to show this question if the user selects an gas engine as a power source, so we will need to specify when the question will be displayed.
6. For the LRG WHEEL **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Gas'. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

OPTNS Group - Fields Tab - Build



- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The window has four tabs: 'Fields', 'Field Detail' (selected), 'List Values', and 'Action Detail'. The 'Field Detail' tab contains the following fields and controls:

- Field ID:** LRG WHEELS
- Group / Order:** OPTNS (dropdown), 15 (text box)
- Label:** What size rear wheels do you want 6" or
- Line Type:** Action (dropdown), Allow Qty's (checkbox)
- Data Type:** List (dropdown), Multiple Selections (checkbox)
- Text Length:** (text box), Limit To List (checkbox, checked)
- Display When:** [POWER TYPE] = 'Gas' (text box)
- Help Text:** (text box)
- Precision:** 0 (spin box)
- Min Value:** 0 (spin box)
- Max Value:** 0 (spin box)
- Increment:** 1 (spin box)
- Numeric Warn:** (checkbox)
- Print Group:** (text box)
- Default Value:** (text box)
- Use Field Price:** (checkbox)
- Field Price:** 0.0000 (text box), Picture (button)
- Price Option:** Fixe... (dropdown), Media (button)
- Required:** (checkbox, checked)
- Long Descr:** (text box)
- Smart ID Len:** 2 (spin box), Smart ID Value (text box)

At the bottom left, there is a row of navigation buttons: back, forward, search, add, and delete.

1. We have multiple wheel sizes in Inventory, but we do not have the option to set the **Line Type** field to Inventory for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will only use one rear wheel size. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. Enter a **Long Description** for the field detail, if applicable.
6. To add an indicator for the wheel size to the Smart ID for the configured Item, enter a length for the wheel size segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. Because the list values are not tied directly to Inventory, you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the LW for large wheels and RW for regular wheels, for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab


Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	Large Rear Wheels	Add Material	TOW40012	
With Value	20	Large Rear Wheels	Add Material	TOW4006	
With Value	30	Regular Rear Wheels	Add Material	TOW4006	
After Field	40		Add Labor	ASSEMBLE7	

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more Actions on the Actions tab.

Since we were not able to add Inventory Items to the Option List, we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which motor option the user selects, we need to create Actions to add the specific motor to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**, accept this default.
3. The **Sequence** number determines the order in which the actions take place.
4. Select a list option from the **Value** drop-down list. For the first action, we will select the 10 Amp Corded Motor.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses an motor size.
7. Repeat Steps 1 through 6 for each option.

Notice there are two records for the Large Rear Wheels Value column. The mower assembly requires 4 wheels total, we will have 2 regular wheels on the front and 2 large wheels on the rear. The Action for each selection is different to tell the production order to use 2 different wheels for this mower.

We will set up the quantity on the Action Detail tab for these wheels to use 2 regular wheels and 2 large wheels when the user selects Large Rear Wheels.

When the user selects Regular Rear Wheels to the question, we will use 4 regular size wheels for the production of the mower.

The last Event for this Action is adding Labor to the assembly, so when the BOM is created we will have an Operation defaulted and can default labor time into the production of the motor.

Action Detail tab

Field	Value	Field	Value
Component ID	TOW40012	Use Override Price	<input type="checkbox"/>
Location ID	MN0001	Override Price	0.0000
Detail Type	Material	Quantity	2.0000
BOM Rev No		Scrap Percent	0.00
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	2.5900
Media Group		Total Qty	2.0000
		Total Cost	5.1800

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly**: The configuration will consume a quantity of the Item for each assembly built.

- **Fixed Qty:** The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
- **As Needed:** The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the Item.

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6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the quantity via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.
9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the Item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Action Detail tab - Labor

The screenshot shows the 'Action Detail' tab for 'Labor'. It contains several input fields and checkboxes for configuring labor actions. The fields are organized into two main sections: 'Operation Information' and 'Time Fields'. The 'Operation Information' section includes fields for Operation ID (ASSEMBLE7), Work Center ID (GEN007), Labor Type ID (ASSEMBLY7), Machine Group ID, Operation Type (Per Unit), Vendor ID, and Sub Unit Cost (0.0000). The 'Time Fields' section includes fields for Queue Time, Mach Setup, Mach Run Time, Labor Setup, Labor Run Time, Wait Time, Move Time, and Price. Each time field has a numeric input, a unit dropdown (Hours, Minutes), and a Formula checkbox. The Queue Time, Mach Setup, Mach Run Time, Labor Run Time, Wait Time, Move Time, and Price fields are currently set to 0.000. The Labor Setup field is set to 15.000. The unit dropdowns are currently set to Hours for most fields and Minutes for Labor Setup. The Formula checkboxes are all unchecked.

Operation information appears for the Operation you selected in the Action field in the Actions tab.

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1. Accept or edit the **Work Center ID** for the Operation.
2. Accept or edit the **Labor Type ID** for the Operation.

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3. Accept or edit the **Machine Group ID** for the Operation.
4. Select the **Operation Type** for the operation: **Per Unit**, **Subcontract**, **Batch**, or **Run Rate**. See the Manufacturing Routing and Resources training manual for details on these types.
5. Accept or edit the **Queue Time** and associated **Units** of measure for the Operation.
6. Accept or edit the **Mach Setup** time and associated **Units** of measure for the Operation.

If you want to calculate the Machine Setup time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

7. Accept or edit the **Mach Run Time** and associated **Units** of measure for the Operation.

If you want to calculate the Machine Run Time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

8. Accept or edit the **Labor Setup** time and associated **Units** of measure for the Operation.


If you want to calculate the Labor Setup time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

9. Accept or edit the **Labor Run Time** and associated **Units** of measure for the Operation.

If you want to calculate the Labor Run Time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

10. Accept or edit the **Wait Time** and associated **Units** of measure for the Operation.
11. Accept or edit the **Move Time** and associated **Units** of measure for the Operation.
12. Enter any **Notes** for the Item.
13. Accept or edit the **Price** for the Operation, as applicable.

If you want to calculate the price via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.


Use the **Save** button  on the toolbar to save your changes.

For the XTRA BAT field: Field tab

FieldsField DetailList ValuesActionsAction Detail

Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
LRG WHEELS	What size rear wheels do you want 6" or...	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
BAT CHRG	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery Electric'	Build	<input type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded Electric'	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery Electri...	Build	<input checked="" type="checkbox"/>

Record 1 of 6

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about the battery size for a battery electric mower, we can enter a field ID of XTRA BAT.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: Do you want extra batteries?
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the user will answer the question.
5. Each question can have only one list of options. Because we don't want to show this question if the user selects a corded electric motor or a gas engine as a power source, we will need to specify when the question will be displayed.
6. For the XTRA BAT **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Battery electric'. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

OPTNS Group - Fields Tab - Build

Build

Accept Reset

And

[POWER TYPE] Equals Battery Electric

[POWER TYPE] = 'Battery Electric'

- Select the **POWER TYPE** group from the **blue** selection option.
- Select **Equals** from the **green** filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

Fields Field Detail List Values Actions Action Detail

Field ID: XTRA BAT

Group / Order: OPTNS 20

Label: Do you want extra batteries?

Line Type: Action Allow Qty's: ☒

Data Type: List Multiple Selections: ☐

Text Length: Limit To List: ☒

Display When: [POWER TYPE] = 'Battery Electric' Build

Help Text:

Precision: 0 Min Value: 0 Max Value: 0 Increment: 1 Numeric Warn: ☐ Print Group: ☐

Default Value: Use Field Price: ☐ Field Price: 0.0000 Price Option: Fixe... Required: ☒ Long Descr: Smart ID Len: 3 Smart ID Value:

Picture: Media:

Navigation: << < > >> + -

1. We have multiple battery sizes in Inventory, but we do not have the option to set the **Line Type** field to **Inventory** for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user can purchase more than use one battery. Mark the **Allow Qty's** and clear the **Multiple Selections** check boxes.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. Enter a **Long Description** for the field detail, if applicable.
6. To add an indicator for the extra battery to the Smart ID for the configured Item, enter a length for the extra battery segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The screenshot shows the 'List Values' tab of a configuration window. The window has five tabs: 'Fields', 'Field Detail', 'List Values' (active), 'Actions', and 'Action Detail'. On the left, there is a list box titled 'Option List' containing four items: '40 V Battery' (selected), '60 V Battery', '80 V Battery', and 'None'. Below the list box are navigation controls and a status bar showing 'Record 1 of 4'. The main area of the tab contains several input fields: 'Item ID' (empty), 'Use Option Price' (checkbox), 'Option Price' (text box with '0.0000'), 'Location ID' (text box), 'Unit' (text box), 'Quantity' (text box), 'Smart ID Value' (text box with '40B'), and 'Long Description' (text area). To the right of these fields is a 'Media' button. On the far right, there is a section titled 'Option Picture' with a 'Use Item Picture' checkbox and a large image area displaying 'No image data'.

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. The list values are not tied directly to Inventory, so you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the battery size for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.

6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	40 V Battery	Add Material	GW40BAT	
With Value	20	60 V Battery	Add Material	GW60BAT	
With Value	30	80 V Battery	Add Material	GW80BAT	
With Value	40	None	Add Material	NOBATTERY	


Record 1 of 4

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more **Actions** on the **Actions** tab.

Since we were not able to add Inventory Items to the Option List, we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which battery option the user selects, we need to create actions to add the specific battery to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**. Accept this default value.
3. The **Sequence** number determines the order in which the Actions take place.
4. Select a list option from the **Value** drop-down list. For the first Action, we will select the 40 V Battery.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.

6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses a battery.
7. Repeat Steps 1 through 6 for each option.

Action Detail tab

Fields				Field Detail	List Values	Actions	Action Detail
Component ID	GW40BAT			Use Override Price	<input type="checkbox"/>		
Location ID	MN0001			Override Price	0.0000	Formula	Formula
Detail Type	Material			Quantity	1.0000	Formula	Formula
BOM Rev No				Scrap Percent	0.00	Notes	
Usage Type	Per Assembly			Unit	EA		
Cost Group	Matl			Unit Cost	35.9900		
Media Group				Total Qty	1.0000		
				Total Cost	35.9900		

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly:** The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty:** The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed:** The configuration will consume the Item as necessary for the assemblies built.


Select the **Usage Type** for the Item.

6. Accept or edit the **Cost Group**.

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7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.
9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the Item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.


Use the **Save** button  on the toolbar to save your changes.

For the **BAT CHR** field:

Field tab

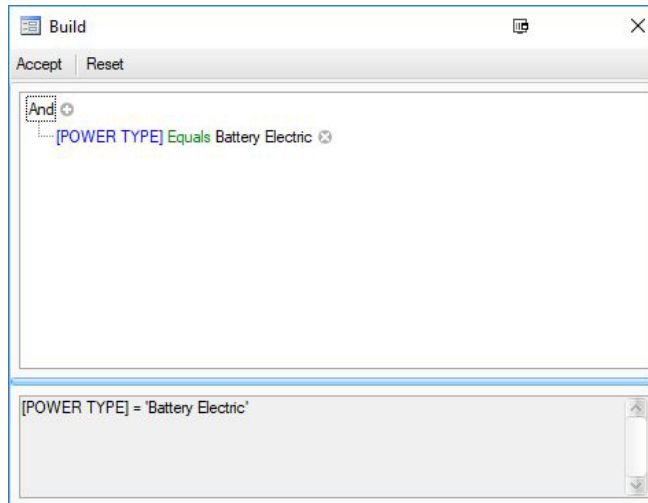
Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
LRG WHEELS	What size rear wheels do you want 6" or...	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
BAT CHR	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery Electric'	Build	<input type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded Electric'	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery Electri...	Build	<input checked="" type="checkbox"/>

Record 1 of 6

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about the charger size for the battery for a battery electric mower, we can enter a Field ID of BAT CHR.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: Do you want a battery charger?

4. The question is optional; the user may skip it. Clear the **Required** check box to allow the user to skip the question.
5. Each question can have only one list of options. Because we don't want to show this question if the user selects a corded electric motor or a gas engine as a power source, we will need to specify when the question will be displayed.
6. For the BAT CHRG **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Battery electric'. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

OPTNS Group - Fields Tab - Build



- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The 'Field ID' is 'BAT CHRG'. The 'Group / Order' is 'OPTNS' with a value of '25'. The 'Label' is 'Do you want a battery charger?'. The 'Line Type' is 'Action'. The 'Data Type' is 'List'. The 'Text Length' is empty. The 'Display When' condition is '[POWER TYPE] = 'Battery Electric''. The 'Help Text' is empty. The 'Precision' is '0'. The 'Min Value' is '0'. The 'Max Value' is '0'. The 'Increment' is empty. The 'Numeric Warn' is empty. The 'Print Group' is empty. The 'Default Value' is empty. The 'Use Field Price' is empty. The 'Field Price' is '0.0000'. The 'Price Option' is 'Fixed'. The 'Required' is empty. The 'Long Descr' is empty. The 'Smart ID Len' is '3'. The 'Smart ID Value' is empty. A 'Build' button is located below the 'Display When' field. Navigation icons are at the bottom left.

1. We have multiple battery sizes in inventory, but we do not have the option to set the **Line Type** field to **Inventory** for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will only use one battery charger. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. Enter a **Long Description** for the field detail, if applicable.
6. To add an indicator for the battery charger to the Smart ID for the configured Item, enter a length for the battery charger segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The screenshot shows the 'List Values' tab of a software application. The interface includes a tab bar at the top with 'Fields', 'Field Detail', 'List Values' (selected), 'Actions', and 'Action Detail'. On the left, there is a list box titled 'Option List' containing three items: '40 V Battery Charger' (selected), '60 V Battery Charger', and '80 V Battery Charger'. Below the list box are navigation buttons and a status bar indicating 'Record 1 of 3'. The main area is divided into two sections. The left section contains fields for 'Item ID', 'Use Option Price' (checkbox), 'Option Price' (text box with '0.0000'), 'Location ID', 'Unit', 'Quantity', 'Smart ID Value' (text box with '40C'), and 'Long Description'. There are also 'Formula' buttons next to the 'Option Price' and 'Unit' fields, and a 'Media' button next to the 'Unit' field. The right section is titled 'Option Picture' and contains a 'Use Item Picture' checkbox and a large image area displaying 'No image data'.

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. The list values are not tied directly to Inventory, so you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the battery charger size for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	40 V Battery Charger	Add Material	GW40CHG	
With Value	20	60 V Battery Charger	Add Material	GW60CHG	
With Value	30	80 V Battery Charger	Add Material	GW80CHG	


Record 1 of 3

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more **Actions** on the **Actions** tab.

Since we were not able to add Inventory Items to the Option List, we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which battery option the user selects, we need to create actions to add the specific battery charger to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**. Accept this default value.
3. The **Sequence** number determines the order in which the Actions take place.
4. Select a list option from the **Value** drop-down list. For the first Action, we will select the 40 V Battery Charger.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses a battery.
7. Repeat Steps 1 through 6 for each option.

Action Detail tab

Fields			
Field	Value	Field	Value
Component ID	GW40CHG	Use Override Price	<input type="checkbox"/>
Location ID	MN0001	Override Price	0.0000
Detail Type	Material	Quantity	1.0000
BOM Rev No		Scrap Percent	0.00
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	15.9900
Media Group		Total Qty	1.0000
		Total Cost	15.9900

Notes: [Empty text area]

The **Action Detail** tab is a detailed extension of the **Actions** tab. Each action on the **Actions** tab has one action on the **Action Detail** tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly**: The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty**: The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed**: The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the Item.


6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

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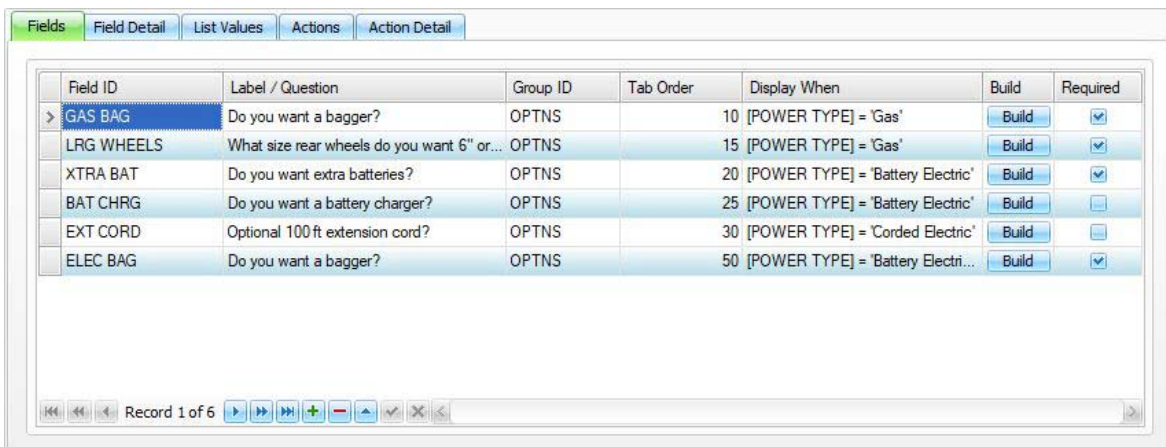
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9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the Item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.


Use the **Save** button  on the toolbar to save your changes.

For the EXT CORD field: Field tab



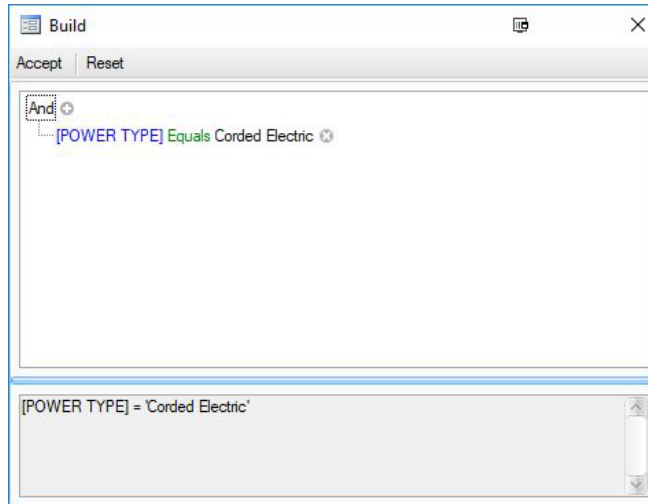
Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
LRG WHEELS	What size rear wheels do you want 6" or...	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
BAT CHRG	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery Electric'	Build	<input type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded Electric'	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery Electri...	Build	<input checked="" type="checkbox"/>

Record 1 of 6

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is asking if they want a 100 ft extension cord, we can enter a field ID of EXT CORD.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: Optional 100 ft extension cord?
4. The question is optional; the user may skip it. Clear the **Required** check box to allow the user to skip the question.
5. Each question can have only one list of options. Because we don't want to show this question if the user selects a corded electric motor or a gas engine as a power source, we will need to specify when the question will be displayed.

6. For the EXT CORD **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Corded electric'. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

OPTNS Group - Fields Tab - Build



- Select the **POWER TYPE** group from the **blue** selection option.
- Select **Equals** from the **green** filter type selection option.
- Select the corresponding “Gas”, “Battery Electric”, or “Corded Electric” where appropriate from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The 'Field ID' is 'EXT CORD'. The 'Group / Order' is 'OPTNS' with a value of '30'. The 'Label' is 'Optional 100 ft extension cord?'. The 'Line Type' is 'Action'. The 'Data Type' is 'Yes/No'. The 'Text Length' is empty. The 'Display When' condition is '[POWER TYPE] = 'Corded Electric''. The 'Help Text' is empty. The 'Precision' is '0', 'Min Value' is '0', 'Max Value' is '0', 'Increment' is '1', and 'Numeric Warn' is unchecked. The 'Print Group' is empty. The 'Default Value' is empty. The 'Use Field Price' checkbox is checked, and the 'Field Price' is '0.0000'. The 'Price Option' is 'Fixed'. The 'Required' checkbox is checked. The 'Long Descr' is empty. The 'Smart ID Len' is '2' and the 'Smart ID Value' is 'EC'. A 'Build' button is located below the 'Display When' field. At the bottom left, there are navigation buttons: back, forward, search, add, and delete.

1. We have one extension cord in Inventory. We will provide the Customer with a Yes/No question as to whether they want a 100 ft extension cord or not.
2. In the **Line Type** field, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab for the response received from the Yes/No question.
3. To present a yes or no choice to the Customer, select **Yes/No** from the **Data Type** drop-down list.
4. Because the Customer will be presented with a Yes/No question, the **Allow Qty's**, **Multiple Selections**, and **Limit to List** fields will be disabled.
5. Select a **Default Value** to display with the question: **Yes or No**.
6. Enter a **Long Description** for the field detail, if applicable.
7. To add an indicator for the extension cord to the Smart ID for the configured Item, enter a length for the extension cord segment of the Smart ID in the **Smart ID Len** field.
8. For the response to the Yes/No question, enter a **Smart ID Value**. For our example, use EC for the Smart ID value.

List Values tab

The **List Values** tab is where you create the list of options for the Customer if you set your Data Type on the Field Detail tab to List. If you set your Line Type on the Field Detail tab to Inventory, you select Inventory Items as the contents of the list of options for the Customer.


Since we selected **Yes/No** as the **Data Type** on the **Field Detail** tab, the **List Values** tab will be blank.

Actions tab

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	Yes	Add Material	EXTCRD100	

The **Actions** tab creates a list of actions to be performed. Each field on the Fields tab can have one or more Actions on the Actions tab.

Because we selected **Yes/No** as the **Data Type** we will be required to enter actions to be done with the responses of Yes or No.

1. Click in a blank record or use the **Append** button  to add a new record.
2. In the **Event** field select **With Value** to update the question.
3. Select **Yes** in the **Value** field to enter the Item to select when the Customer answers the question with a Yes response.
4. Select **Add Material** in the **Action Type** field to activate the Action field with a list of Inventory Items.
5. Select the Inventory Item for the extension cord you have in your Inventory from the **Action** field drop down list.

We will take no action if the Customer selects **No** to the response to the question, so we will only enter an action for the Yes response.

Action Detail tab

The screenshot shows the 'Action Detail' tab with the following fields and values:

Field	Value	Field	Value
Component ID	EXTCRD100	Use Override Price	<input type="checkbox"/>
Location ID	MN0001	Override Price	0.0000
Detail Type	Material	Quantity	1.0000
BOM Rev No		Scrap Percent	0.00
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	12.9900
Media Group		Total Qty	1.0000
		Total Cost	12.9900

Additional features include 'Formula' buttons for Override Price, Quantity, and Unit Cost, and a 'Notes' text area on the right.

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly**: The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty**: The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed**: The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the Item.


6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

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9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.


If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the Item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Use the **Save** button  on the toolbar to save your changes.

ELEC BAG Field ID Field tab

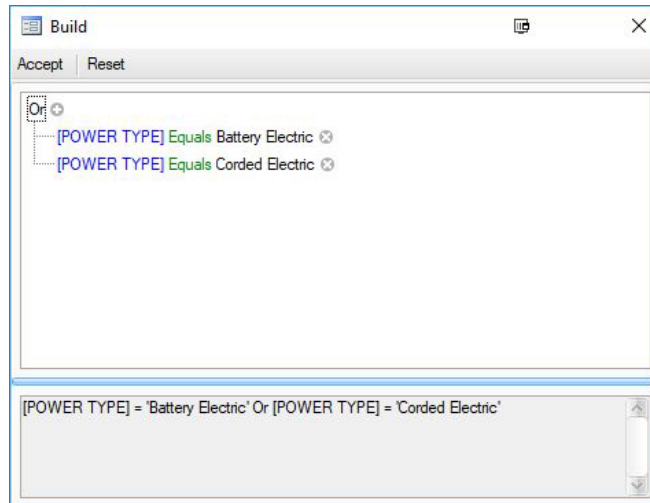
Field ID	Label / Question	Group ID	Tab Order	Display When	Build	Required
> GAS BAG	Do you want a bagger?	OPTNS	10	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
LRG WHEELS	What size rear wheels do you want 6" or...	OPTNS	15	[POWER TYPE] = 'Gas'	Build	<input checked="" type="checkbox"/>
XTRA BAT	Do you want extra batteries?	OPTNS	20	[POWER TYPE] = 'Battery Electric'	Build	<input checked="" type="checkbox"/>
BAT CHRG	Do you want a battery charger?	OPTNS	25	[POWER TYPE] = 'Battery Electric'	Build	<input type="checkbox"/>
EXT CORD	Optional 100 ft extension cord?	OPTNS	30	[POWER TYPE] = 'Corded Electric'	Build	<input type="checkbox"/>
ELEC BAG	Do you want a bagger?	OPTNS	50	[POWER TYPE] = 'Battery Electri...	Build	<input checked="" type="checkbox"/>

Record 1 of 6

1. Click in a blank record or use the **Append** button  to add a new record.
2. Enter a **Field ID** for the question. If our question is about a bagger for the mower, we can enter a field ID of ELEC BAG.
3. In the **Label/Question** field, enter the question the user will need to answer, such as: Do you want a bagger?
4. The question must be answered; the user cannot skip it. Mark the **Required** check box to ensure the Customer will answer the question.
5. Each question can have only one list of options. We don't want to show this question if the user selects an gas engine as a power source, so we will need to specify when the question will be displayed.

6. For the ELEC BAG **Display When**, we can specify that the question will only appear if the POWER TYPE is equal to 'Battery Electric' AND 'Corded Electric'. To build the conditional statement, click the **Build** button to open the Build window. The dialog box allows you to build a logic statement in the same manner as the Data Filter in Interactive Views. See the General Information Guide for details on building the logic statement.

OPTNS Group - Fields Tab - Build



- Click on the And at the top of the filter window and select Or.
- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select "Battery Electric" from the black option selection.
- Click the Plus next to Or to add another filter.
- Select the **POWER TYPE** group from the blue selection option.
- Select **Equals** from the green filter type selection option.
- Select "Corded Electric" from the black option selection.
- Once you have entered your logic statement click **Accept** to save the Build statement.

Field Detail tab

The screenshot shows the 'Field Detail' tab of a configuration window. The 'Field ID' is 'ELEC BAG'. The 'Group / Order' is 'OPTNS' with a value of '50'. The 'Label' is 'Do you want a bagger?'. The 'Line Type' is 'Action'. The 'Data Type' is 'List'. The 'Text Length' is empty. The 'Display When' condition is '[POWER TYPE] = 'Battery Electric' Or [P...'. The 'Help Text' is empty. The 'Precision' is '0', 'Min Value' is '0', 'Max Value' is '0', and 'Increment' is '1'. The 'Numeric Warn' is empty. The 'Print Group' is empty. The 'Default Value' is empty. The 'Use Field Price' is empty. The 'Field Price' is '0.0000'. The 'Price Option' is 'Fixed'. The 'Required' checkbox is checked. The 'Long Descr' is empty. The 'Smart ID Len' is '2' and the 'Smart ID Value' is empty. There are buttons for 'Picture', 'Media', and 'Build'. At the bottom are navigation icons.

1. We have multiple bagger sizes in Inventory, but we do not have the option to set the **Line Type** field to Inventory for a Manufacturing Order configuration. Since the question/answer will consume material, select **Action** from the drop-down list. We can select an Inventory Item in the Actions tab.
2. To present a list of options to the user, select **List** from the **Data Type** drop-down list.
3. The user will only use one bagger. Leave the **Allow Qty's** and **Multiple Selections** check boxes blank.
4. To prevent the user from typing an option not in Inventory, mark the **Limit to List** check box.
5. To add an indicator for the bagger to the Smart ID for the configured Item, enter a length for the bagger segment of the Smart ID in the **Smart ID Len** field.

List Values tab

The **List Values** tab is where you create the list of options if you set your **Data Type** on the **Field Detail** tab to **List**.

1. Enter an option for the **Option List**. Because the list values are not tied directly to Inventory, you cannot select specific Inventory Items for the list.
2. For each option you enter into the list, enter a **Smart ID Value**. For our example, use the motor size for the Smart ID value.
3. If you want to associate a media code with the Item, use the **Media** button.
4. If you want to add a picture for the option, right-click in the **Image** field and select **Load**.
5. Enter a **Long Description** for the option, if applicable.
6. Repeat Steps 1 to 5 for each option in the list.

If you want to enter a specific price for the option, mark the **Use Option Price** check box, which will enable the **Option Price** field and the **Formula** check box. Enter a price for the option in the **Option Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Actions tab

Fields

Field Detail

List Values

Actions

Action Detail

Event	Sequence	Value	Action Type	Action	Message / Text Line
> With Value	10	16" Bag	Add Material	GW16BAG	
With Value	20	17" Bag	Add Material	GW17BAG	
With Value	30	19" Bag	Add Material	GW19BAG	
With Value	40	20" Bag	Add Material	GW20BAG	
With Value	50	21" Bag	Add Material	GW21BAG	
With Value	60	None	Add Material	NOBAG	
After Field	70		Add Labor	ASSEMBLE7	


Record 1 of 7

The **Actions** tab creates a list of actions to be performed. Each field on the **Fields** tab can have one or more Actions on the Actions tab.

Since we were not able to add Inventory Items to the Option List, we will associate each option with an Inventory Item on the Actions tab.

The **Value** field drop-down list include the options you created, as well as an **Any Value** option. If the Action happens only when a certain option is selected, choose that option from the drop-down list. If the Action takes place no matter which option the user selects, choose **Any Value**.

Since we are adding Inventory Items depending on which motor option the user selects, we need to create Actions to add the specific bag to the configuration.

1. Click in a blank record or use the **Append** button  to add a new record.
2. The **Event** field defaults to **With Value**, accept this default.
3. The **Sequence** number determines the order in which the actions take place.
4. Select a list option from the **Value** drop-down list. For the first action, we will select the 16" Bag.
5. For the **Action Type**, select **Add Material** to add an Inventory Item to the configuration.
6. In the **Action** field, select an Inventory Item to add to the configuration when the user chooses a bag size.
7. Repeat Steps 1 through 6 for each option.

Since there is a choice to have no bagger when the question is answered, for this example we set up a Service Item in Inventory as NOBAG with no cost or price. We added this as an Action so it will be listed in the parts to inform the warehouse to not include a bagger.

The last Event for this Action is adding Labor to the assembly, so when the BOM is created we will have an Operation defaulted and can default labor time into the production of the mower.

Action Detail tab

Field	Value	Field	Value
Component ID	GW16BAG	Use Override Price	<input type="checkbox"/>
Location ID	MN0001	Override Price	0.0000
Detail Type	Material	Quantity	1.0000
BOM Rev No		Scrap Percent	0.00
Usage Type	Per Assembly	Unit	EA
Cost Group	Matl	Unit Cost	12.9900
Media Group		Total Qty	1.0000
		Total Cost	12.9900

Notes

The **Action Detail** tab is a detailed extension of the Actions tab. Each action on the Actions tab has one action on the Action Detail tab.

1. On the **Actions** tab, select the action for which you want to view details, then click on the **Action Detail** tab. Details about the selected Action appear.
2. Accept or select the **Location ID** for the Item.
3. Accept or edit the **Detail Type**.
4. Accept or edit the **BOM Rev No**, as applicable.
5. In the **Usage Type** field, there are 3 options:
 - **Per Assembly:** The configuration will consume a quantity of the Item for each assembly built.
 - **Fixed Qty:** The configuration will consume a fixed quantity of the Item no matter how many assemblies are built.
 - **As Needed:** The configuration will consume the Item as necessary for the assemblies built.

Select the **Usage Type** for the Item.

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6. Accept or edit the **Cost Group**.
7. Accept or edit the **Media Group**, as applicable.
8. Accept or edit the **Quantity** of the Item to include in the configuration, or if you want to set the quantity via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.
9. Enter a **Scrap Percentage**, as applicable.
10. Accept or edit the **Unit** of measure for the Item.
11. Add any **Notes** about the Item or Action.
12. Repeat steps 1 through 11 for each action on the Actions tab.

If you want to override the Inventory price for the Item, mark the **Use Override Price** check box, which will enable the **Override Price** field and the **Formula** check box. Enter a price for the Item in the **Override Price** field, or if you want to set the price via a formula, mark the **Formula** check box and use the **Formula** button to open the formula window.

Action Detail tab - Labor

The screenshot shows the 'Action Detail' tab for 'Labor'. It features a grid of configuration fields. On the left, there are fields for 'Operation ID' (ASSEMBLE7), 'Work Center ID' (GEN007), 'Labor Type ID' (ASSEMBLY7), 'Machine Group ID', 'Operation Type' (Per Unit), 'Vendor ID', and 'Sub Unit Cost' (0.0000). The main area contains time-related fields: 'Queue Time' (0.000), 'Mach Setup' (0.000), 'Mach Run Time' (0.000), 'Labor Setup' (15.000), 'Labor Run Time' (10.000), 'Wait Time' (0.000), 'Move Time' (0.000), and 'Price' (0.0000). Each time field has a unit selector (Hours or Minutes) and a 'Formula' checkbox. To the right of these fields are 'Formula' buttons. A 'Notes' field is also present.

Operation information appears for the Operation you selected in the Action field in the Actions tab.

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1. Accept or edit the **Work Center ID** for the Operation.
2. Accept or edit the **Labor Type ID** for the Operation.
3. Accept or edit the **Machine Group ID** for the Operation.
4. Select the **Operation Type** for the operation: **Per Unit**, **Subcontract**, **Batch**, or **Run Rate**. See the Manufacturing Routing and Resources training manual for details on these types.
5. Accept or edit the **Queue Time** and associated **Units** of measure for the Operation.

6. Accept or edit the **Mach Setup** time and associated **Units** of measure for the Operation.

If you want to calculate the Machine Setup time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

7. Accept or edit the **Mach Run Time** and associated **Units** of measure for the Operation.

If you want to calculate the Machine Run Time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

8. Accept or edit the **Labor Setup** time and associated **Units** of measure for the Operation.

If you want to calculate the Labor Setup time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

9. Accept or edit the **Labor Run Time** and associated **Units** of measure for the Operation.

If you want to calculate the Labor Run Time via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.


10. Accept or edit the **Wait Time** and associated **Units** of measure for the Operation.

11. Accept or edit the **Move Time** and associated **Units** of measure for the Operation.

12. Enter any **Notes** for the Item.

13. Accept or edit the **Price** for the Operation, as applicable.

If you want to calculate the price via a formula, mark the **Formula** check box and click the **Formula** button to open the Formula window.

Use the **Save** button  on the toolbar to save your changes.

Once you finish the configurator maintenance, use the **Validate** button on the toolbar to validate the configuration. You will get a notification window listing corrections, if any, that you need to make before the configuration is valid. Once the corrections, if any, are complete, a window will appear to notify you the configuration has been validated.

Notes:

The configuration above is just an example of how you can set up a Sales Order configuration. This configuration is very simple. You may require a more complex setup, such as a more defined limit of the engine and motor to deck size setup.

You may want to use the Variables and Constraints to limit the selections made, or display a message when criteria has been met to display the message.

Before starting the configuration setup, use the Configuration Worksheet to determine all the possible questions and combinations of questions and available selections for these questions. You will save time in the long run doing thorough planning before setup, instead of having errors or incorrect information in your configurations because of a lack of planning.

If possible use an off-line company to test your configuration setup to make sure you get the results you were planning on getting.

USING CONFIGURATOR

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OVERVIEW

The Configurator is used to generate items in Sales Orders, once the Configurator Maintenance has been completed. When using the Configurator in a Sales Order, you are taken step by step through building the Sales Order Items, or the Manufacturing Order Item that will be put onto the Sales Order.

The Configurator selection is activated from the Task Pane that can be displayed on the right side of the Sales Order, Orders screen.

Once you have set up the configuration, it's a good idea to create a Sales Order using the configuration to make sure it behaves in the way you expect.

SALES ORDER CONFIGURATOR TRANSACTIONS

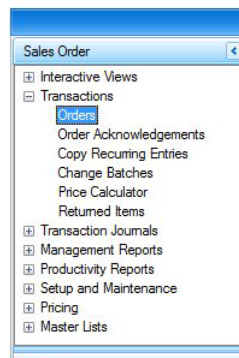
Sales Order transactions are the means used to build the configured “kit” that was set up in the Configurator Maintenance with the Sales Orders Config Type.

When the Sales Order is entered and the configured kit is built the Transaction Type of the Sales Order will be New, and treated the same as any manually entered Sales Order.

To work with the **Orders** functions, follow these steps:

1. Select **Orders** from the **Transactions** menu.


Orders Menu



- The **Orders** screen appears with the **Header** tab displayed.

Orders Screen

Orders Screen - Header Tab

- The **Orders** screen appears, blank with the **Transaction No** field active.
- To add a new order select the **New Record** button  from the toolbar.
- To change the Transaction Type to a type other than the default of **New**, select the **Transaction Type: New, Invoice, Price Quote, Credit Memo, or RMA**.

If you are editing an order, the Transaction Type appears for existing Order, and cannot be changed.

If you are producing a Credit Memo, do not use negative numbers; the system automatically assigns the Credit Memo value a negative sign.

6. Select the **Transaction No** of an Order to work with, or enter a new **Transaction No**. If you are entering a New Order, and you selected Yes to Use System-Generated Numbers in the **Business Rules** function in System Manager, leave this field blank and the system will create the Transaction No for you.
7. The current workstation date appears in the **Transaction Date** field. Edit it, if necessary.
8. Select or edit the Customer ID in the **Sold To** field.
9. Enter or edit the Customer's Purchase Order Number in the **PO Number** field.
10. The current workstation date appears as the **PO Date**. Edit it if necessary.
11. Enter **Notes** or view any Notes specific to this Order.
12. If you use batch processing, select or edit the **Batch Code** for the Order.
13. Enter or edit the **Location ID** from which you are selling the Items, or accept the current value as set up in System Manager. The Location ID you enter also appears on the **Item Detail** tab.
14. The current date appears in the **Req Ship Date** field. Edit this Requested Ship Date, if necessary.
15. The current period and year appear in the **Fiscal Period/Year** fields. Edit these values, if necessary.
16. If you use multi currency, the **Currency ID** you assigned to the Customer's record appears and cannot be changed. If you want to enter Orders for this Customer in a different currency, set up a second Customer record.

If the Customer currency is not the same as the Base Currency, use the **Base Currency** check box to toggle currency amounts between the Customer's currency and the Base Currency.

If you do not use multi currency, this field is not available.

17. If you use multi-currency, the most recent daily Exchange Rate from the System Manager **Currency Exchange Rates** function appears in the **Exch Rate** field. You can enter a different rate (or double-click or press F6 to open the System Manager **Currency Exchange Rates** function).

If you do not use multi-currency, this field is not available.

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18. If you use multi-currency, the **Orig Exch Rate** is displayed with a the Exchange Rate originally entered into the Order, if the Exchange Rate has been adjusted.

The configuration pane is part of the Tasks pane on the right side of the Sales Order screen.

Orders Screen with Task Pane

The screenshot displays the 'SO Orders' application window. The main area shows transaction details for a new order. The 'Tasks' pane on the right is expanded, showing customer information and item configuration options.

Transaction Details:

- Transaction No: 00000186
- Base Currency: Transaction Type: New
- Net Due: 0.00
- Transaction Date: 10/3/2017
- Batch Code: #####
- Fiscal Period / Year: 10 / 2017
- Sold To: Axi040
- Location ID: MN0001
- Currency ID: USD
- Exch Rate: 1
- PO Number: Req Ship Date: 10/3/2017
- Original Invoice: Orig Exch Rate: 1
- Blanket Number:

Customer Information (Attachments):

- Customer: xis Electronics
- Contact: David Johanson
- Address: 102 Birch Street, Wheeland, ND 58079
- Phone: (701)-603-2312
- Fax: (701)-603-2311
- Credit Status: 00002200000
- Customer Credit: Credit Limit: 0.00
- Open Invo...: 1,060.52
- Transactio...: 514.49
- Credit Ava...: -1,575.01

Item Info:

- Configure: View Picture
- Location:
- Unit:
- Availability: Price
- Qty On Hand: 0.0000
- Qty Committed: 0.0000
- Qty Available: 0.0000
- Qty On Order: 0.0000

Re-sequence | PO Req

Item ID	Description	Location ID	Qty Ordered	Qty Needed	Qty Shipp...	Unit	Unit Price	Ext Price	Actual Ship...

Record 0 of 0

Orders Task Pane

The screenshot shows a software window titled "Tasks" with a tabbed interface. The "Customer" tab is active, displaying the following information:

Customer: wis Electronics
Contact: David Johanson
102 Birch Street
Wheatland, ND 58079
Phone: (701)-603-2312
Fax: (701)-603-2311
Credit Status: 00002200000

Customer Credit:

Credit Limit	0.00
Open Invo...	1,060.52
Transactio...	514.49
Credit Ava...	-1,575.01

Customer Aging:

Item Info.

[Configure](#) [View Picture](#)

Location: [Dropdown]
Unit: [Dropdown]

Availability	Price
Qty On Hand	0.0000
Qty Committed	0.0000
Qty Available	0.0000
Qty On Order	0.0000

1. To select a configuration, click the [Configure](#) button [Configure](#).
2. The **Select Configuration** window appears listing all available configurations. Use the Data Filter to refine the number of configurations shown.

Orders - Select Configuration Screen

Select Configuration

Apply Filter

And

Drag a column header here to group by that column

Description	Category	Config Type	Customer ID	Base Item ID	Default Price	Source
> LAWNMOWER M1	Mowers	Manufacturing Orders		MOWER	0.0000	Active
FISHTANKKIT	Aquariums	Sales Orders		AQUARIUM	0.0000	Active
AQUARIUMKIT	Aquariums	Sales Orders		AQUARIUM	0.0000	Active

NOTE: If you created a configuration, and it does not appear in the Select Configuration window, return to the Configuration Maintenance screen and Validate the configuration.

3. Select the configuration you want to work with by double-clicking the configuration record.
4. The **Configurator Entry** screen will appear.

Orders - Configurator Entry Screen

Configurator Entry

1 of 1 | X | Validate | Recalc | Print | Create | Show BOM

Question: What size tank do you want 10, 20, 29 or 40 gal?


Answers

	Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
	<input type="checkbox"/>	10 Gallon Hooded Aquarium	AQU10GAL	MN0001	EA	1.0000	29.9900
I	<input checked="" type="checkbox"/>	20 Gallon Hooded Aquarium	AQU20GAL	MN0001	EA	1.0000	64.9900
	<input type="checkbox"/>	29 Gallon Hooded Aquarium	AQU29GAL	MN0001	EA	1.0000	94.9900
	<input type="checkbox"/>	40 Gallon Hooded Aquarium	AQU40GAL	MN0001	EA	1.0000	134.9900

Notes

Groups: TANK-Tank Size


Media



Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99

Base Price: 0.0000 Options: 64.9900 Disc %: 0.00 \$: 0.00 Total Price: 64.99 Total Cost: 34.99 G/P %: 46.16 \$: 30.00

5. Answer each question as it is presented. Navigate through the questions using the navigation buttons .
6. To answer a question with multiple choices, select the record by marking the **Select** check box.

If you try to select multiple selections for a question that does not allow multiple selections a message box will appear stating multiple selections are not allowed.

Orders - Configurator Entry Screen - Question 2

Configurator Entry

1 of 1 | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Do you want fresh or salt water fish?

Answers

	Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input checked="" type="checkbox"/>		Freshwater				1.0000	0.0000
<input type="checkbox"/>		Saltwater				1.0000	0.0000

Notes

Groups: TANK-Tank Size

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00

Base Price: 0.0000 Options: 64.9900 Disc %: 0.00 \$: 0.00 Total Price: 64.99 Total Cost: 34.99 G/P %: 46.16 \$: 30.00

7. As you answer the questions, your answers appear in the detail section of the screen.
8. You can add any **Notes** as you go through the configuration.

Orders - Configurator Entry Screen - Question 3

Configurator Entry

1 of 1 | Validate | Recalc | Print | Create | Show BOM

Question: What size heater do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input checked="" type="checkbox"/>	100W Aquarium Heater	AQU100WH...	MN0001	EA	1.0000	32.9900
<input type="checkbox"/>	150W Aquarium Heater	AQU150WH...	MN0001	EA	1.0000	34.9900
<input type="checkbox"/>	200W Aquarium Heater	AQU200WH...	MN0001	EA	1.0000	36.9900
<input type="checkbox"/>	50W Aquarium Heater	AQU50WHE...	MN0001	EA	1.0000	29.9900

Notes

Groups: HTFLT-Heater and Filter

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you wa...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99

Base Price: 0.0000 Options: 97.9800 Disc %: 0.00 \$: 0.00 Total Price: 97.98 Total Cost: 51.48 G/P %: 47.46 \$: 46.50

Orders - Configurator Entry Screen - Question 4

Configurator Entry

1 of 1 | Validate | Recalc | Print | Create | Show BOM

Question: Do you want a thermometer?

Answers

☒ Yes
☐ No

Help:

Notes

Groups: HTFLT-Heater and Filter

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you wa...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99

Base Price: 0.0000 Options: 97.9800 Disc %: 0.00 \$: 0.00 Total Price: 97.98 Total Cost: 51.48 G/P %: 47.46 \$: 46.50

9. When you encounter a Yes/No question the only selections available will be a Yes or No radio button. The default set in the Configuration Maintenance will be selected.

- If you select **Yes**, the Inventory Item set up for the Yes response will appear in the detail section.
- If you select **No**, a message will appear, if you have set up a message for the No response. No Item will be added to the detail section for a No response.

Orders - Configurator Entry Screen - Question 5

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: What size air pump do you need?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	10 Gal Aquar Air Pump	AQU10GAL...	MN0001	EA	1.0000	16.1800
<input checked="" type="checkbox"/>	20 Gal Aquar Air Pump	AQU20GAL...	MN0001	EA	1.0000	20.6800
<input type="checkbox"/>	29 Gal Aquar Air Pump	AQU29GAL...	MN0001	EA	1.0000	22.6800
<input type="checkbox"/>	40 Gal Aquar Air Pump	AQU40GAL...	MN0001	EA	1.0000	24.6800

Notes

Groups: HTFLT-Heater and Filter

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you wan...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you w...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price 0.0000 Options 121.9500 Disc % 0.00 \$ 0.00 Total Price 121.95 Total Cost 62.95 G/P % 48.38 \$ 59.00

Orders - Configurator Entry Screen - Question 6

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: How many air stones do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input checked="" type="checkbox"/>	Aquarium Mist Air Stone 3 ...	AQUAIRST3	MN0001	EA	1.0000	2.9900
<input type="checkbox"/>	Aquarium Mist Air Stone 6 ...	AQUAIRST6	MN0001	EA	1.0000	4.9900

Notes

Groups: HTFLT-Heater and Filter

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you wan...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you w...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 124.9400 Disc %: 0.00 \$: 0.00 Total Price: 124.94 Total Cost: 64.44 G/P %: 48.42 \$: 60.50

Orders - Configurator Entry Screen - Question 7

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: What size water filter do you need?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	10 Gallon Power Water Filter	AQU10WAT...	MN0001	EA	1.0000	14.9900
<input checked="" type="checkbox"/>	20 Gallon Power Water Filter	AQU20WAT...	MN0001	EA	1.0000	19.9900
<input type="checkbox"/>	29 Gallon Power Water Filter	AQU29WAT...	MN0001	EA	1.0000	25.9900
<input type="checkbox"/>	40 Gallon Power Water Filter	AQU40WAT...	MN0001	EA	1.0000	29.9900

Notes

Groups: HTFLT-Heater and Filter

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you wan...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you w...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 144.9300 Disc %: 0.00 \$: 0.00 Total Price: 144.93 Total Cost: 74.43 G/P %: 48.64 \$: 70.50

Orders - Configurator Entry Screen - Question 8

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Do you want extra filter cartridges?

Answers

☐ Yes
☒ No

Help:

Notes

Groups: HTFLT-Heater and Filter

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want?	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt water?	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you want?	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you want?	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 144.9300 Disc %: 0.00 \$: 0.00 Total Price: 144.93 Total Cost: 74.43 G/P %: 48.64 \$: 70.50

Orders - Configurator Entry Screen - Question 9

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: What size water conditioner do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	Aquarium Water Condition...	AQUCOND16	MN0001	EA	1.0000	12.2900
<input checked="" type="checkbox"/>	Aquarium Water Condition...	AQUCOND4	MN0001	EA	1.0000	5.9900
<input type="checkbox"/>	Aquarium Water Condition...	AQUCOND8	MN0001	EA	1.0000	8.9900

Notes

Groups: WRTCD-Water conditioner & treatment

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want?	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt water?	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you want?	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you want?	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 150.9200 Disc %: 0.00 \$: 0.00 Total Price: 150.92 Total Cost: 76.92 G/P %: 49.03 \$: 74.00

Orders - Configurator Entry Screen - Question 10

Configurator Entry

1 of 1

Validate Recalc Print Create Show BOM

Question: Do you want a freshwater test kit?

Answers

Yes

No

Help:

Notes

Groups

WRTCD-Water conditioner & treatment

Media

No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you wan...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you w...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price

0.0000

Options

150.9200

Disc %

0.00

\$

0.00

Total Price

150.92

Total Cost

76.92

G/P %

49.03

\$

74.00

Orders - Configurator Entry Screen - Question 11

Configurator Entry

1 of 1 | Validate | Recalc | Print | Create | Show BOM

Question: What color and size gravel do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	Aquarium Gravel Brown 2 lb	AQUGRVLB...	MN0001	EA	1.0000	2.9900
<input checked="" type="checkbox"/>	Aquarium Gravel Brown 10 lb	AQUGRVLB...	MN0001	EA	1.0000	8.9900
<input type="checkbox"/>	Aquarium Gravel Caribbea...	AQUGRVLC...	MN0001	EA	1.0000	8.9900
<input type="checkbox"/>	Aquarium Gravel Caribbea...	AQUGRVLC...	MN0001	EA	1.0000	5.4900

TRAVERSE

Use 1 to 1 ½ lbs of gravel per gallon of tank. Rinse thoroughly in cold water before using. Never use soap or detergent.

Notes

OK

Groups: ACC-Accessories

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you wan...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you w...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 157.9100 Disc %: 0.00 \$: 0.00 Total Price: 157.91 Total Cost: 79.91 G/P %: 49.40 \$: 78.00

10. When a message has been set up to display **Before Field**, the message will appear when that question's screen is displayed. Click **OK** to clear the message and select from the available choices.

Orders - Configurator Entry Screen - Question 12

Configurator Entry

1 of 1 | X | Validate | Recalc | Print | Create | Show BOM


Question: What plants do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input checked="" type="checkbox"/>	Aquarium Pink Plant	AQUPINKPL...	MN0001	EA	1.0000	2.9900
<input type="checkbox"/>	Aquarium Sword Leaf Plant	AQUSWLFPL...	MN0001	EA	1.0000	3.9900
<input type="checkbox"/>	Aquarium Variety Plants 1	AQUVARPL...	MN0001	EA	1.0000	9.9900
<input checked="" type="checkbox"/>	Aquarium Variety Plants 2	AQUVARPL...	MN0001	EA	1.0000	5.9900

Notes

Media



Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you w...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you...	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 184.8700 Disc %: 0.00 \$: 0.00 Total Price: 184.87 Total Cost: 92.37 G/P %: 50.04 \$: 92.50

11. When you encounter a question that allows multiple selections and editing the quantity, mark the **Selected** check box for each selection, and edit the **Quantity** when applicable.

Orders - Configurator Entry Screen - Question 13

Configurator Entry

1 of 1 | [Icons] | Validate | Recalc | Print | Create | Show BOM

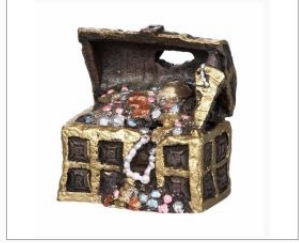
Question: What ornaments do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input checked="" type="checkbox"/>	Aquarium Slate Rock Cave	AQUSLTRC...	MN0001	EA	1.0000	11.9900
<input checked="" type="checkbox"/>	Aquarium Treasure Chest ...	AQUTRSCH...	MN0001	EA	1.0000	8.9900
<input checked="" type="checkbox"/>	Aquarium Coral Plant Rock	AQUCRMP...	MN0001	EA	1.0000	28.9900

Notes

Media



Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want?	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt water?	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you want?	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you want?	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 205.8500 Disc %: 0.00 \$: 0.00 Total Price: 205.85 Total Cost: 101.35 G/P %: 50.77 \$: 104.50

Orders - Configurator Entry Screen - Question 14

Configurator Entry

1 of 1 | [Icons] | Validate | Recalc | Print | Create | Show BOM


Question: Which freshwater fish would you like?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	Freshwater Guppy	AQUUGUPPY...	MN0001	EA	1.0000	3.4900
<input checked="" type="checkbox"/>	Freshwater Angel Fish	AQUANGLF...	MN0001	EA	2.0000	6.4900
<input checked="" type="checkbox"/>	Freshwater Molly Fish	AQUMOLLY...	MN0001	EA	2.0000	2.4900
<input checked="" type="checkbox"/>	Freshwater Plecostomus Fish	AQUPLCMS...	MN0001	EA	1.0000	8.4900
<input checked="" type="checkbox"/>	Freshwater Tiger Barb Fish	AQUTRGRB...	MN0001	EA	4.0000	2.5900

Notes

Media



Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want?	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt water?	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you want?	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you want?	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 242.6600 Disc %: 0.00 \$: 0.00 Total Price: 242.66 Total Cost: 119.06 G/P %: 50.94 \$: 123.60

12. When pictures are set up with the Item, and the Use Item Picture is selected, you will see the picture displayed in the Media area of the screen.

Orders - Configurator Entry Screen - Question 15

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Which freshwater fish foods would you like?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input checked="" type="checkbox"/>	Bottom Feeder Pellets 7.9 oz	AQUABTMF...	MN0001	EA	1.0000	7.4900
<input checked="" type="checkbox"/>	Tetra Algae Wafers 2.12 oz	AQUASGWF...	MN0001	EA	1.0000	5.9900
<input type="checkbox"/>	Tetra Algae Wafers 5.29 oz	AQUASGWF...	MN0001	EA	1.0000	10.9900
<input checked="" type="checkbox"/>	Tetra Color Fish Food Flak...	AQUFDTTR...	MN0001	EA	1.0000	5.4900
<input type="checkbox"/>	Tetra Color Fish Food Flak...	AQUFDTTR...	MN0001	EA	1.0000	11.2400

Notes

Groups: FOOD-Fish Food

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you want...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you want...	20 Gal Aquar Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Base Price: 0.0000 Options: 261.6300 Disc %: 0.00 \$: 0.00 Total Price: 261.63 Total Cost: 126.53 G/P %: 51.64 \$: 135.10

13. If you change a quantity, use the **Recalc** button on the toolbar to recalculate the totals.

14. Use the **Validate** button on the toolbar to check the configuration for validity.

Orders - Configurator Entry Screen - Validate

The screenshot shows the 'Configurator Entry' window. A dialog box titled 'TRAVERSE' is displayed in the center, containing an information icon and the text 'Configuration is valid.' with an 'OK' button. The background window shows a question: 'Question: Which freshwater fish foods would you like?'. Below the question is a table of answers with checkboxes. The 'Answers' table has columns: Selected, Answer, and Price. The 'Answers' table is partially visible, showing 'Tetra Color Fish Food Flak...' selected. To the right, there is a 'Groups' dropdown set to 'FOOD-Fish Food' and a 'Media' section with 'No image data'. At the bottom, a detailed table shows the configuration items and their costs.

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> What size tank do you want...	20 Gallon Hooded Aquarium	1.0000	34.9900	0.0000	64.9900	34.99	64.99
Do you want fresh or salt w...	Freshwater	1.0000	0.0000	0.0000	0.0000	0.00	0.00
What size heater do you w...	100W Aquarium Heater	1.0000	16.4900	0.0000	32.9900	16.49	32.99
Do you want a thermometer?	Yes	1.0000	1.4900	0.0000	3.2900	1.49	3.29
What size air pump do you...	20 Gall Aquarium Air Pump	1.0000	9.9800	0.0000	20.6800	9.98	20.68

Summary fields at the bottom:

Base Price	0.0000	Options	261.6300	Disc %	0.00	\$	0.00	Total Price	261.63	Total Cost	126.53	G/P %	51.64	\$	135.10
------------	--------	---------	----------	--------	------	----	------	-------------	--------	------------	--------	-------	-------	----	--------

15. Once you have finished setting up your configuration, you can print a configuration list or a price estimate by using the **Print** button on the toolbar.

Orders - Configurator Entry Screen - Print

The screenshot shows the 'Print Transaction' window. It has a toolbar with 'Print', 'Output', 'Send', 'Preview', and 'Reset'. Below the toolbar, there is a 'Type' section with 'Configuration List' and 'Price Estimate'. To the right, there is a 'Group List' section with a checkbox for 'Blank' and buttons for 'All' and 'None'.

- Select the Type of transaction report you wish to print: **Configuration List** or **Price Estimate**.
- If you entered a Group List into the Configuration Maintenance screen, select the **Group List** you wish to print. If no Group List was entered **Blank** will be selected.
- Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Print	Print the report.

The **Configuration List** is a list of Items included in the configuration, as well as the costs and prices for the items.

Configuration List

<< CONFIGURATION LIST >>				PAGE	1																
				DATE	10/03/2017																
ContinentalProducts Unlimited 4301 Dean Lakes Blvd Shakopee, MN 55379 UNITED STATES (952)-403-5700			QUOTE NO.	00000106																	
			QUOTE DATE	10/03/2017																	
FISHTANKKIT																					
S Axis040 O Axis Electronics L Accounts Payable D 5102 Birch Street T Wheatland, ND 58079 O			<table border="1"> <thead> <tr> <th colspan="4">SUMMARY PRICE</th> </tr> </thead> <tbody> <tr> <td>BASE PRICE</td> <td>0.0000</td> <td>TOTAL PRICE</td> <td>261.63</td> </tr> <tr> <td>OPTION S</td> <td>261.63</td> <td></td> <td></td> </tr> <tr> <td>DISCOUNT</td> <td>0.00</td> <td></td> <td></td> </tr> </tbody> </table>			SUMMARY PRICE				BASE PRICE	0.0000	TOTAL PRICE	261.63	OPTION S	261.63			DISCOUNT	0.00		
SUMMARY PRICE																					
BASE PRICE	0.0000	TOTAL PRICE	261.63																		
OPTION S	261.63																				
DISCOUNT	0.00																				
Question/Answer/Notes	QTY	Unit Price	Total Price																		
What size tank do you want 10, 20, 29 or 40 gal?	1.0000	64.9900	64.9900																		
20 Gallon Hooded Aquarium																					
Do you want fresh or salt water fish?	1.0000	0.0000	0.0000																		
Freshwater																					
What size heater do you want?	1.0000	32.9900	32.9900																		
100W Aquarium Heater																					
Do you want a thermometer?	1.0000	3.2900	3.2900																		
Yes																					
What size air pump do you need?	1.0000	20.6800	20.6800																		
20 Gal Aquar Air Pump																					
How many air stones do you want?	1.0000	2.9900	2.9900																		
Aquarium Mist Air Stone 3 Cnt																					
What size water filter do you need?	1.0000	19.9900	19.9900																		
20 Gallon Power Water Filter																					
Do you want extra filter cartridges?	0.0000	0.0000	0.0000																		
No																					
What size water conditioner do you want?	1.0000	5.9900	5.9900																		
Aquarium Water Conditioner 4 oz																					
Do you want a freshwater test kit?	1.0000	6.9900	6.9900																		
Yes																					
What color and size gravel do you want?	2.0000	8.9900	17.9800																		
Aquarium Gravel Caribbean 10 lb																					
What plants do you want?	1.0000	2.9900	2.9900																		
Aquarium Pink Plant																					
What plants do you want?	1.0000	5.9900	5.9900																		
Aquarium Variety Plants 2																					
What ornaments do you want?	1.0000	11.9900	11.9900																		
Aquarium Slate Rock Cave																					
What ornaments do you want?	1.0000	8.9900	8.9900																		
Aquarium Treasure Chest Ornament																					
Which freshwater fish would you like?	2.0000	6.4900	12.9800																		
Freshwater Angel Fish																					
Which freshwater fish would you like?	2.0000	2.4900	4.9800																		
Freshwater Molly Fish																					
Which freshwater fish would you like?	1.0000	8.4900	8.4900																		
Freshwater Plecostomus Fish																					
Which freshwater fish would you like?	4.0000	2.5900	10.3600																		
Freshwater Tiger Barb Fish																					
Which freshwater fish foods would you like?	1.0000	7.4900	7.4900																		
Bottom Feeder Pellets 7.9 oz																					
Which freshwater fish foods would you like?	1.0000	5.9900	5.9900																		
Tetra Algae Wafers 2.12 oz																					
Which freshwater fish foods would you like?	1.0000	5.4900	5.4900																		
Tetra Color Fish Food Flakes 2.2 oz																					

The **Price Estimate** lists the Items in the configuration along with the estimated price of the configuration.

Price Estimate

<< PRICE ESTIMATE >>				PAGE 1																
				DATE 10/03/2017																
ContinentalProducts Unlimited 4301 Dean Lakes Blvd Shakopee, MN 55379 UNITED STATES (952)-403-5700		QUOTE NO. 00000106 QUOTE DATE 10/03/2017																		
FISHTANKKIT S Axi040 O Axis Electronics L Accounts Payable D 5102 Birch Street T Wheatland, ND 58079 O		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4">SUMMARY PRICE</th> </tr> </thead> <tbody> <tr> <td style="text-align: right;">BASE PRICE</td> <td style="text-align: right;">0.0000</td> <td style="text-align: right;">TOTAL PRICE</td> <td style="text-align: right;">261.63</td> </tr> <tr> <td style="text-align: right;">OPTIONS</td> <td style="text-align: right;">261.63</td> <td></td> <td></td> </tr> <tr> <td style="text-align: right;">DISCOUNT</td> <td style="text-align: right;">0.00</td> <td></td> <td></td> </tr> </tbody> </table>			SUMMARY PRICE				BASE PRICE	0.0000	TOTAL PRICE	261.63	OPTIONS	261.63			DISCOUNT	0.00		
SUMMARY PRICE																				
BASE PRICE	0.0000	TOTAL PRICE	261.63																	
OPTIONS	261.63																			
DISCOUNT	0.00																			
Question	Answer	QTY	Unit Price	Ext. Price																
What size tank do you want 10, 20, 29 or 40 gal?	20 Gallon Hooded Aquarium	1.0000	64.9900	64.9900																
Do you want fresh or salt water fish?	Freshwater	1.0000	0.0000	0.0000																
What size heater do you want?	100W Aquarium Heater	1.0000	32.9900	32.9900																
Do you want a thermometer?	Yes	1.0000	3.2900	3.2900																
What size air pump do you need?	20 Gal Aquar Air Pump	1.0000	20.6800	20.6800																
How many air stones do you want?	Aquarium Mist Air Stone 3 Cnt	1.0000	2.9900	2.9900																
What size water filter do you need?	20 Gallon Power Water Filter	1.0000	19.9900	19.9900																
Do you want extra filter cartridges?	No	0.0000	0.0000	0.0000																
What size water conditioner do you want?	Aquarium Water Conditioner 4 oz	1.0000	5.9900	5.9900																
Do you want a freshwater test kit?	Yes	1.0000	6.9900	6.9900																
What color and size gravel do you want?	Aquarium Gravel Caribbean 10 lb	2.0000	8.9900	17.9800																
What plants do you want?	Aquarium Pink Plant	1.0000	2.9900	2.9900																
What plants do you want?	Aquarium Variety Plants 2	1.0000	5.9900	5.9900																
What ornaments do you want?	Aquarium Slate Rock Cave	1.0000	11.9900	11.9900																
What ornaments do you want?	Aquarium Treasure Chest Ornament	1.0000	8.9900	8.9900																
Which freshwater fish would you like?	Freshwater Angel Fish	2.0000	6.4900	12.9800																
Which freshwater fish would you like?	Freshwater Molly Fish	2.0000	2.4900	4.9800																
Which freshwater fish would you like?	Freshwater Plecostomus Fish	1.0000	8.4900	8.4900																
Which freshwater fish would you like?	Freshwater Tiger Barb Fish	4.0000	2.5900	10.3600																
Which freshwater fish foods would you like?	Bottom Feeder Pellets 7.9 oz	1.0000	7.4900	7.4900																
Which freshwater fish foods would you like?	Tetra Algae Wafers 2.12 oz	1.0000	5.9900	5.9900																
Which freshwater fish foods would you like?	Tetra Color Fish Food Flakes 2.2 oz	1.0000	5.4900	5.4900																
OPTION TOTAL \$				261.6300																

16. To create the transaction, click the **Create** button on the toolbar.

17. The **Create Transaction(s)** screen will appear.

Orders - Configurator Entry Screen - Create

Create Transactions

OK Activity Reset

Options

☒ Create Sales Order Lines

Items

Item Description

Aquarium fish tank kit

Quantity

	Quantity	Due Date	Release Number
*			

18. To create Sales Order lines for the components in the configuration, mark the **Create Sales Order Lines** check box.

19. Click **OK** to create the transaction.

20. The Sales Order screen will appear with the components selected from the Configurator questions' answers.

Orders - Order Screen Filled

SO Orders

Transaction No: 00000095 | Base Currency: | Transaction Type: New | Net Due: 232.88

Header | Documents | Bill-To | Ship-To | Tax | Payments | Totals

Transaction Date: 9/27/2017 | Batch Code: ##### | Fiscal Period / Year: 9 / 2017
 Sold To: Axi040 | Location ID: MN0001 | Currency ID: USD | Exch Rate: 1
 PO Number: | Req Ship Date: 9/27/2017 | Original Invoice: | Orig Exch Rate: 1.0000000000
 PO Date: 9/27/2017 | Blanket Number: |

Notes: |

Re-sequence | Detail | PO Req | Completed >>

Item ID	Description	Location ID	Qty Ordered	Qty Needed	Qty Shipped	Unit	Unit Price	Ext Price	Actual Ship Date
AQU10GAL	10 Gallon Hooded Aquarium	MN0001	1.0000	1.0000	0.0000	EA	29.9900	29.99	
AQU50WHEAT	50W Aquarium Heater	MN0001	1.0000	1.0000	0.0000	EA	29.9900	29.99	
AQUUTHERM	Aquarium Thermometer	MN0001	1.0000	1.0000	0.0000	EA	3.2900	3.29	
AQU10GALAIRP	10 Gal Aquar Air Pump	MN0001	1.0000	1.0000	0.0000	EA	13.4900	13.49	
AQUAIRTUBE	Aquarium 8 Ft Airline Tube	MN0001	1.0000	1.0000	0.0000	EA	2.6900	2.69	
AQUAIRST3	Aquarium Mist Air Stone 3 Cnt	MN0001	1.0000	1.0000	0.0000	EA	2.9900	2.99	
AQU10WATPOWFIL	10 Gallon Power Water Filter	MN0001	1.0000	1.0000	0.0000	EA	14.9900	14.99	
AQUUCOND8	Aquarium Water Conditioner 8 oz	MN0001	1.0000	1.0000	0.0000	EA	8.9900	8.99	
AQUFWTSTKIT	Aquarium Freshwater Test Kit	MN0001	1.0000	1.0000	0.0000	EA	6.9900	6.99	
AQUGRVLCRBN10	Aquarium Gravel Caribbean 10 lb	MN0001	1.0000	1.0000	0.0000	EA	8.9900	8.99	
AQUIPINKPLNT	Aquarium Pink Plant	MN0001	1.0000	1.0000	0.0000	EA	2.9900	2.99	
AQUVARPLNT2	Aquarium Variety Plants 2	MN0001	1.0000	1.0000	0.0000	EA	5.9900	5.99	
AQUCRMLPRCK	Aquarium Coral Plant Rock	MN0001	1.0000	1.0000	0.0000	EA	28.9900	28.99	
AQUGUPPYFWFSH	Freshwater Guppy	MN0001	2.0000	2.0000	0.0000	EA	3.4900	6.98	
AQUANGLFWFSH	Freshwater Angel Fish	MN0001	2.0000	2.0000	0.0000	EA	6.4900	12.98	
AQUPLCMSFWFSH	Freshwater Plecostomus Fish	MN0001	1.0000	1.0000	0.0000	EA	8.4900	8.49	
AQUTRGBRBFWSH	Freshwater Tiger Barb Fish	MN0001	5.0000	5.0000	0.0000	EA	2.5900	12.95	
AQUABTMFDRFD	Bottom Feeder Pellets 7.9 oz	MN0001	1.0000	1.0000	0.0000	EA	7.4900	7.49	
AQUASGWFRFD212	Tetra Algae Wafers 2.12 oz	MN0001	1.0000	1.0000	0.0000	EA	5.9900	5.99	
AQUFDTTRCLR22	Tetra Color Fish Food Flakes 2.2 oz	MN0001	1.0000	1.0000	0.0000	EA	5.4900	5.49	

Record 1 of 20

Process the Sales Order as you would any Sales Order that was manually entered.

See the Sales Order Training Manual for further details on the remaining tabs and how to process the Sales Order.

Make sure you test each of the conditions to verify you have set up the configuration the way you intended.

MANUFACTURING ORDER CONFIGURATOR TRANSACTIONS

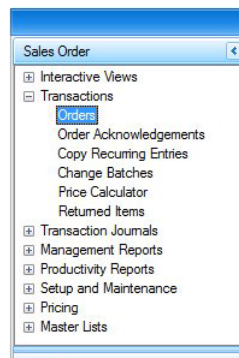
Sales Order transactions are the means used to build the configured “BOM” that was set up in the Configurator Maintenance with the Manufacturing Orders Config Type.

When the Sales Order is entered and the configured BOM is built the Transaction Type of the Sales Order will be New, and treated the same as any manually entered Sales Order.

To work with the **Orders** functions, follow these steps:

1. Select **Orders** from the **Transactions** menu.

Orders Menu



- The **Orders** screen appears with the **Header** tab displayed.

Orders Screen

SO Orders

Transaction No: [] Base Currency: [] Transaction Type: [] Net Due: []

Header Documents Bill-To Ship-To Tag Payments Totals

Transaction Date: [] Batch Code: [] Fiscal Period / Year: [] / []

Sold To: [] Location ID: [] Currency ID: [] Exch Rate: []

PO Number: [] Req Ship Date: [] Original Invoice: [] Orig Exch Rate: []

PO Date: [] Blanket Number: []

Notes: []

Re-sequence PO Req Completed >>

Item ID	Description	Location ID	Qty Ordered	Qty Needed	Qty Shipped	Unit	Unit Price	Ext Price	Actual Ship Date

Record 0 of 0

Orders Screen - Header Tab

Transaction No: 00000106 Base Currency: [] Transaction Type: New Net Due: 0.00

Header Documents Bill-To Ship-To Tag Payments Totals


Transaction Date: 10/3/2017 Batch Code: ##### Fiscal Period / Year: 10 / 2017

Sold To: Av040 Location ID: MN0001 Currency ID: USD Exch Rate: 1

PO Number: [] Req Ship Date: 10/3/2017 Original Invoice: [] Orig Exch Rate: 1

PO Date: 10/3/2017 Blanket Number: []

Notes: []

- The **Orders** screen appears, blank with the **Transaction No** field active.
- To add a new order select the **New Record** button  from the toolbar.
- To change the Transaction Type to a type other than the default of **New**, select the **Transaction Type: New, Invoice, Price Quote, Credit Memo, or RMA**.

If you are editing an order, the Transaction Type appears for existing Order, and cannot be changed.

If you are producing a Credit Memo, do not use negative numbers; the system automatically assigns the Credit Memo value a negative sign.

6. Select the **Transaction No** of an Order to work with, or enter a new **Transaction No**. If you are entering a New Order, and you selected Yes to Use System-Generated Numbers in the **Business Rules** function in System Manager, leave this field blank and the system will create the Transaction No for you.
7. The current workstation date appears in the **Transaction Date** field. Edit it, if necessary.
8. Select or edit the Customer ID in the **Sold To** field.
9. Enter or edit the Customer's Purchase Order Number in the **PO Number** field.
10. The current workstation date appears as the **PO Date**. Edit it if necessary.
11. Enter **Notes** or view any Notes specific to this Order.
12. If you use batch processing, select or edit the **Batch Code** for the Order.
13. Enter or edit the **Location ID** from which you are selling the Items, or accept the current value as set up in System Manager. The Location ID you enter also appears on the **Item Detail** tab.
14. The current date appears in the **Req Ship Date** field. Edit this Requested Ship Date, if necessary.
15. The current period and year appear in the **Fiscal Period/Year** fields. Edit these values, if necessary.
16. If you use multi currency, the **Currency ID** you assigned to the Customer's record appears and cannot be changed. If you want to enter Orders for this Customer in a different currency, set up a second Customer record.

If the Customer currency is not the same as the Base Currency, use the **Base Currency** check box to toggle currency amounts between the Customer's currency and the Base Currency.

If you do not use multi currency, this field is not available.

17. If you use multi-currency, the most recent daily Exchange Rate from the System Manager **Currency Exchange Rates** function appears in the **Exch Rate** field. You can enter a different rate (or double-click or press F6 to open the System Manager **Currency Exchange Rates** function).

If you do not use multi-currency, this field is not available.

Maint

Maint

Maint



Maint

18. If you use multi-currency, the **Orig Exch Rate** is displayed with a the Exchange Rate originally entered into the Order, if the Exchange Rate has been adjusted.

The configuration pane is part of the Tasks pane on the right side of the Sales Order screen.

Orders Screen with Task Pane

The screenshot shows the 'SO Orders' window. The main area contains fields for Transaction No (00000186), Base Currency, Transaction Type (New), and Net Due (0.00). Below these are tabs for Header, Documents, Bill-To, Ship-To, Tax, Payments, and Totals. The Header tab is active, showing fields for Transaction Date (10/3/2017), Batch Code (#####), Fiscal Period / Year (10 / 2017), Sold To (Axi040), Location ID (MN0001), Currency ID (USD), PO Number, Req Ship Date (10/3/2017), Original Invoice, Exch Rate (1), Orig Exch Rate (1), PO Date (10/3/2017), Notes, and Blanket Number.

The right side of the window features a 'Tasks' pane with several sections:

- Customer Attachments:** Lists customer information for 'xis Electronics', including contact details and credit status.
- Customer Credit:** Shows credit limit (0.00), open invoice (1,060.52), transaction (514.49), and credit available (-1,575.01).
- Customer Aging:** A section for aging customer transactions.
- Item Info:** Includes a 'Configure' button and a 'View Picture' button.
- Availability Price:** A table showing quantities on hand, committed, available, and on order.

Item ID	Description	Location ID	Qty Ordered	Qty Needed	Qty Shipp...	Unit	Unit Price	Ext Price	Actual Ship...

At the bottom of the window, it shows 'Record 0 of 0'.

Orders Task Pane

The screenshot shows the 'Orders Task Pane' with the following data:

Customer	
wis Electronics	
Contact: David Johanson	
102 Birch Street	
Wheatland, ND 58079	
Phone: (701)-603-2312	
Fax: (701)-603-2311	
Credit Status: 00002200000	
Customer Credit:	
Credit Limit	0.00
Open Invo...	1,060.52
Transactio...	514.49
Credit Ava...	-1,575.01
Customer Aging:	

Item Info.	
Configure View Picture	
Location	
Unit	
Availability Price	
Qty On Hand	0.0000
Qty Committed	0.0000
Qty Available	0.0000
Qty On Order	0.0000

1. To select a configuration, click the Configure button [Configure](#).
2. The **Select Configuration** window appears listing all available configurations. Use the Data Filter to refine the number of configurations shown.

Orders - Select Configuration Screen

Select Configuration

Apply Filter

And

Drag a column header here to group by that column

Description	Category	Config Type	Customer ID	Base Item ID	Default Price	Source
> LAWNMOWER M1	Mowers	Manufacturing Orders		MOWER	0.0000	Active
FISHTANKKIT	Aquariums	Sales Orders		AQUARIUM	0.0000	Active
AQUARIUMKIT	Aquariums	Sales Orders		AQUARIUM	0.0000	Active

NOTE: If you created a configuration, and it does not appear in the Select Configuration window, return to the Configuration Maintenance screen and Validate the configuration.

3. Select the configuration you want to work with by double-clicking the configuration record.
4. The **Configurator Entry** screen will appear.

Orders - Configurator Entry Screen

Configurator Entry

1 of 1 | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Power Source

Groups: POWER-Power group - Elec. Gas, Recharable Battery

Media: No image data

Answers:

	Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
	<input type="checkbox"/>	Gas				1.0000	0.0000
I	<input checked="" type="checkbox"/>	Battery Electric				1.0000	0.0000
	<input type="checkbox"/>	Corded Electric				1.0000	0.0000

Notes:

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00

Base Price: 0.0000 Options: 0.0000 Disc %: 0.00 \$: 0.00 Total Price: 0.00 Total Cost: 0.00 G/P %: 0.00 \$: 0.00

- Answer each question as it is presented. Navigate through the questions using the navigation buttons .
- To answer a question with multiple choices, select the record by marking the **Select** check box.

If you try to select multiple selections for a question that does not allow multiple selections a message box will appear stating multiple selections are not allowed.

Orders - Configurator Entry Screen - Question 2

Configurator Entry

1 of 1 | Validate | Recalc | Print | Create | Show BOM

Question: Do you want a 17, 19 or 21 inch deck?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	17" Mower Deck				1.0000	69.9900
<input type="checkbox"/>	19" Mower Deck				1.0000	79.9900
<input checked="" type="checkbox"/>	21" Mower Deck				1.0000	79.9900

Notes

Groups: DECK-Deck Width Group

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00
Do you want a 17, 19 or 21 ...	21" Mower Deck	1.0000	39.9900	0.0000	79.9900	39.99	79.99

Base Price: 0.0000 Options: 79.9900 Disc %: 0.00 \$: 0.00 Total Price: 79.99 Total Cost: 39.99 G/P %: 50.01 \$: 40.00

7. As you answer the questions, your answers appear in the detail section of the screen.
8. You can add any **Notes** as you go through the configuration.

Orders - Configurator Entry Screen - Question 3 w/Message

Configurator Entry

1 of 1 | X | Validate | Recalc | Print | Create | Show BOM

Question: What size battery motor do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	40V Battery Motor				1.0000	69.9900
<input type="checkbox"/>	60V Battery Motor				1.0000	89.9900
<input checked="" type="checkbox"/>	80V Battery Motor				1.0000	129.9900

TRAVERSE

Use the 40V motor for 17" and 19" mower decks. Use the 60V motor for 19" and 21" mower decks. Use the 80V motor for 21" mower deck.

OK

Media

No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00
Do you want a 17, 19 or 21 ...	21" Mower Deck	1.0000	39.9900	0.0000	79.9900	39.99	79.99

Base Price: 0.0000 Options: 79.9900 Disc %: 0.00 \$: 0.00 Total Price: 79.99 Total Cost: 39.99 G/P %: 50.01 \$: 40.00

9. When a message has been set up to display **Before Field**, the message will appear when that question's screen is displayed. Click **OK** to clear the message and select from the available choices.

Orders - Configurator Entry Screen - Question 3

Configurator Entry

1 of 1 | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: What size battery motor do you want?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	40V Battery Motor				1.0000	69.9900
<input checked="" type="checkbox"/>	60V Battery Motor				1.0000	89.9900
<input type="checkbox"/>	80V Battery Motor				1.0000	129.9900

Notes

Groups: ENGMT-Engine or Motor size

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00
Do you want a 17, 19 or 21 ...	21" Mower Deck	1.0000	39.9900	0.0000	79.9900	39.99	79.99
What size battery motor do ...	60V Battery Motor	1.0000	39.9900	0.0000	89.9900	39.99	89.99

Base Price: 0.0000 Options: 169.9800 Disc %: 0.00 \$: 0.00 Total Price: 169.98 Total Cost: 79.98 G/P %: 52.95 \$: 90.00

Orders - Configurator Entry Screen - Question 4

Configurator Entry

1 of 1 | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Do you want extra batteries?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	40 V Battery				1.0000	69.9900
<input checked="" type="checkbox"/>	60 V Battery				1.0000	114.9900
<input type="checkbox"/>	80 V Battery				1.0000	134.9900
<input type="checkbox"/>	None				1.0000	0.0000

Notes

Groups: OPTNS-Accessories Group

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00
Do you want a 17, 19 or 21 ...	21" Mower Deck	1.0000	39.9900	0.0000	79.9900	39.99	79.99
What size battery motor do ...	60V Battery Motor	1.0000	39.9900	0.0000	89.9900	39.99	89.99
Do you want extra batteries?	60 V Battery	1.0000	49.9900	0.0000	114.9900	49.99	114.99

Base Price: 0.0000 Options: 284.9700 Disc %: 0.00 \$: 0.00 Total Price: 284.97 Total Cost: 129.97 G/P %: 54.39 \$: 155.00

Orders - Configurator Entry Screen - Question 5

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Do you want a battery charger?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	40 V Battery Charger				1.0000	45.9900
<input checked="" type="checkbox"/>	60 V Battery Charger				1.0000	45.9900
<input type="checkbox"/>	80 V Battery Charger				1.0000	65.9900

Notes

Groups: OPTNS-Accessories Group

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00
Do you want a 17, 19 or 21...	21" Mower Deck	1.0000	39.9900	0.0000	79.9900	39.99	79.99
What size battery motor do ...	60V Battery Motor	1.0000	39.9900	0.0000	89.9900	39.99	89.99
Do you want extra batteries?	60 V Battery	1.0000	49.9900	0.0000	114.9900	49.99	114.99
Do you want a battery char...	60 V Battery Charger	1.0000	20.9900	0.0000	45.9900	20.99	45.99

Base Price: 0.0000 Options: 330.9600 Disc %: 0.00 \$: 0.00 Total Price: 330.96 Total Cost: 150.96 G/P %: 54.39 \$: 180.00

Orders - Configurator Entry Screen - Question 6

Configurator Entry

1 of 1 | X | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Do you want a bagger?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	16" Bag				1.0000	29.9900
<input type="checkbox"/>	17" Bag				1.0000	29.9900
<input type="checkbox"/>	19" Bag				1.0000	34.9900
<input type="checkbox"/>	20" Bag				1.0000	39.9900
<input checked="" type="checkbox"/>	21" Bag				1.0000	39.9900
<input type="checkbox"/>	None				1.0000	0.0000

Record 5 of 6

Notes

Groups: OPTNS-Accessories Group

Media: No image data

Media

Question	Answer	Quantity	Unit Cost	Adj Unit Cost	Unit Price	Ext Cost	Ext Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00
Do you want a 17, 19 or 21...	21" Mower Deck	1.0000	39.9900	0.0000	79.9900	39.99	79.99
What size battery motor do ...	60V Battery Motor	1.0000	39.9900	0.0000	89.9900	39.99	89.99
Do you want extra batteries?	60 V Battery	1.0000	49.9900	0.0000	114.9900	49.99	114.99
Do you want a battery char...	60 V Battery Charger	1.0000	20.9900	0.0000	45.9900	20.99	45.99

Base Price: 0.0000 Options: 370.9500 Disc %: 0.00 \$: 0.00 Total Price: 370.95 Total Cost: 169.95 G/P %: 54.19 \$: 201.00

10. When you encounter a question that allows multiple selections and editing the quantity, mark the **Selected** check box for each selection, and edit the **Quantity** when applicable.
11. If you change a quantity, use the **Recalc** button on the toolbar to recalculate the totals.
12. Use the **Validate** button on the toolbar to check the configuration for validity.

Orders - Configurator Entry Screen - Validate

Configurator Entry

1 of 1 | [Icons] | Validate | Recalc | Print | Create | Show BOM

Question: Do you want a bagger?

Answers

Selected	Answer	Item ID	Loc ID	Unit	Quantity	Unit Price
<input type="checkbox"/>	16" Bag				1.0000	29.9900
<input type="checkbox"/>	17" Bag				1.0000	29.9900
<input type="checkbox"/>	19" Bag				1.0000	34.9900
<input type="checkbox"/>	20" Bag					
<input checked="" type="checkbox"/>	21" Bag					
<input type="checkbox"/>	None					

Configuration is valid.

OK

Groups: OPTNS-Accessories Group

Media: No image data

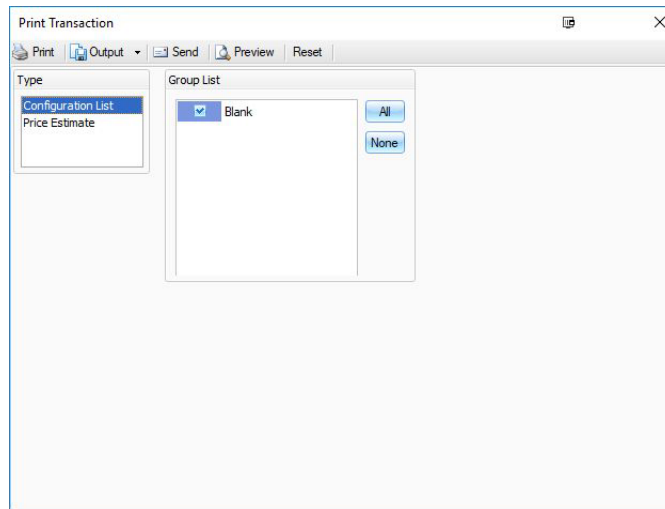
Media

Question	Answer	Quantity	Unit Cost	Adj. Unit Cost	Unit Price	Ext. Cost	Ext. Price
> Power Source	Battery Electric	1.0000	0.0000	0.0000	0.0000	0.00	0.00
Do you want a 17, 19 or 21...	21" Mower Deck	1.0000	39.9900	0.0000	79.9900	39.99	79.99
What size battery motor do ...	60V Battery Motor	1.0000	39.9900	0.0000	89.9900	39.99	89.99
Do you want extra batteries?	60 V Battery	1.0000	49.9900	0.0000	114.9900	49.99	114.99
Do you want a battery char...	60 V Battery Charger	1.0000	20.9900	0.0000	45.9900	20.99	45.99

Base Price: 0.0000 Options: 370.9500 Disc %: 0.00 \$: 0.00 Total Price: 370.95 Total Cost: 169.95 G/P %: 54.19 \$: 201.00

13. Once you have finished setting up your configuration, you can print a configuration list or a price estimate by using the **Print** button on the toolbar.

Orders - Configurator Entry Screen - Print



- Select the Type of transaction report you wish to print: **Configuration List** or **Price Estimate**.
- If you entered a Group List into the Configuration Maintenance screen, select the **Group List** you wish to print. If no Group List was entered **Blank** will be selected.
- Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Print	Print the report.

The **Configuration List** is a list of Items included in the configuration, as well as the costs and prices for the items.

Configuration List

<< CONFIGURATION LIST >>

PAGE 1
DATE 10/03/2017

Continental Products Unlimited
4301 Dean Lakes Blvd
Shakopee, MN 55379
UNITED STATES
(952)-403-5700

QUOTE NO. 00000107
QUOTE DATE 10/03/2017

LAWNMOWER M1

S Axi040
D Axis Electronics
L Accounts Payable
D 5102 Birch Street
T Wheatland, ND 58079
O

SUMMARY PRICE

BASE PRICE	0.0000	TOTAL PRICE	370.95
OPTIONS	370.95		
DISCOUNT	0.00		

Question/Answer/Notes	QTY	Unit Price	Total Price
Power Source	1.0000	0.0000	0.0000
Battery Electric			
Do you want a 17, 19 or 21 inch deck?	1.0000	79.9900	79.9900
21" Mower Deck			
What size battery motor do you want?	1.0000	89.9900	89.9900
60V Battery Motor			
Do you want extra batteries?	1.0000	114.9900	114.9900
60 V Battery			
Do you want a battery charger?	1.0000	45.9900	45.9900
60 V Battery Charger			
Do you want a bagger?	1.0000	39.9900	39.9900
21" Bag			
OPTION TOTALS			370.9500

The **Price Estimate** lists the Items in the configuration along with the estimated price of the configuration.

Price Estimate

<< PRICE ESTIMATE >>				PAGE 1										
Continental Products Unlimited 4301 Dean Lakes Blvd Shakopee, MN 55379 UNITED STATES (952)-403-5700		QUOTE NO. 00000107 QUOTE DATE 10/03/2017	DATE 10/03/2017											
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>LAWNMOWER M1</p> <p>S Ax1040</p> <p>O Axis Electronics</p> <p>L Accounts Payable</p> <p>D 5102 Birch Street</p> <p>T Wheatland, ND 58079</p> <p>O</p> </div> <div style="width: 65%; border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: left; padding: 2px;">SUMMARY PRICE</th> </tr> </thead> <tbody> <tr> <td style="width: 30%; padding: 2px;">BASE PRICE</td> <td style="padding: 2px;">0.0000</td> </tr> <tr> <td style="padding: 2px;">OPTIONS</td> <td style="padding: 2px;">370.95</td> </tr> <tr> <td style="padding: 2px;">DISCOUNT</td> <td style="padding: 2px;">0.00</td> </tr> <tr> <td style="padding: 2px;">TOTAL PRICE</td> <td style="padding: 2px;">370.95</td> </tr> </tbody> </table> </div> </div>					SUMMARY PRICE		BASE PRICE	0.0000	OPTIONS	370.95	DISCOUNT	0.00	TOTAL PRICE	370.95
SUMMARY PRICE														
BASE PRICE	0.0000													
OPTIONS	370.95													
DISCOUNT	0.00													
TOTAL PRICE	370.95													
Question	Answer	QTY	Unit Price	Ext. Price										
Power Source	Battery Electric	1.0000	0.0000	0.0000										
Do you want a 17, 19 or 21 inch deck?	21" Mower Deck	1.0000	79.9900	79.9900										
What size battery motor do you want?	60V Battery Motor	1.0000	89.9900	89.9900										
Do you want extra batteries?	60 V Battery	1.0000	114.9900	114.9900										
Do you want a battery charger?	60 V Battery Charger	1.0000	45.9900	45.9900										
Do you want a bagger?	21" Bag	1.0000	39.9900	39.9900										
OPTION TOTALS				370.9500										

14. Click the **Show BOM** button on the toolbar to view the bill of material for the configured item. This is view-only; to make changes, close the BOM screen to return to the configuration entry screen.

Orders - Configurator Entry - Show BOM

Bills of Material

Assembly ID: BE2160V60B60CBG0001 Revision: 1 Routing Type: Primary

General

Routing

Re-sequence Copy From Routing

Operation ID	Operation Type	Description
>	Per Unit	Default

Component

Re-sequence Change Routing

Component ID	Location ID	Cost Group ID	Qty	Unit	Unit Cost	Total Cost	Description
> GW19MD	MN0001	Matl	1.0000	EA	39.9900	39.9900	GreenWorks 19" Mow Deck ...
GW60VM	MN0001	Matl	1.0000	EA	39.9900	39.9900	GreenWorks 60 V Motor
GW60BAT	MN0001	Matl	1.0000	EA	49.9900	49.9900	GreenWorks 60V Battery
GW60CHG	MN0001	Matl	1.0000	EA	20.9900	20.9900	GreenWorks 60V Battery Cha...
GW21BAG	MN0001	Matl	1.0000	EA	18.9900	18.9900	GreenWorks 21" Mow Bag

15. To create the transaction, click the **Create** button on the toolbar.
16. The **Create Transaction(s)** screen will appear.

Orders - Configurator Entry Screen - Create

17. To create an Item ID for the configuration, mark the **Create Item ID** check box.
18. To create a Bill of Material for the configuration, mark the **Create BOM** check box.
19. To create Sales Order lines for the components in the configuration, mark the **Create Sales Order Lines** check box.
20. In the **Quantity** section, enter the number of configured Items to build in the **Quantity** field. Once you enter a quantity, the **Release Production Order** and the **Print Production Order** check boxes will become available.
21. To release the Production Order for the configuration from the SO screen, mark the **Release Production Order** check box. If you do not want to release the Production Order, leave the check box blank. This will create a Production Order with a status of "Planned". You can then release the order through the MFG - Production Orders function. See the MFG - Production Training Manual for details on releasing the Production Order.
22. To print the production order for the configuration, mark the **Print Production Order** check box.
23. Add an additional description in the **Additional Description** field just below the **Item Description** field, if necessary.

This additional description will be populated based on Config Desc Type field in the Configuration Maintenance screen in the General section of the screen.

24. In the **Quantity** section, enter the **Due Date** for the configured Items.
25. To add another release, click in the empty record and enter a Quantity and Due Date.
26. Click **OK** to create the transaction.
27. The **Production Picking List** screen will appear. If you selected Picking List for the Production Order Type Business Rule (page 3-5).

Production Picking List Screen

- Select the field by which to sort the list in the **Sort By** field: **Order Number**, **Customer ID**, **Start Date**, or **Assembly ID**.
- Mark the **Bar Codes** check box if you want bar codes to appear on the Picking List.
- Select the **Banded Rows** check box, if applicable, to highlight alternating lines on the report to make the report easier to read.

NOTE: Use the System Manager Print Preferences function to define the default setting for this check box. You can then override this default when you print the report.

- Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Print	Print the report.

Production Picking List

Continental Products Unlimited							PAGE 1
Production Picking List							
Sorted by Order No							
Order No	00000015			Release No	1		
Assembly ID	BE2160V60B60CBG0001			Lawn mower with deck			
Build Qty	1.0000	EA					
Required Date	10/3/2017	Start Date	10/3/2017	Customer ID	Axi040		
Notes							
Req ID	Component ID	Deliver To	Location ID	Qty	Unit	Bin	
5	GW19MD GreenWorks 19" Mow Deck w/handle		MN0001	1.0000	EA		
7	GW60VM GreenWorks 60 V Motor		MN0001	1.0000	EA		
5	GW60BAT GreenWorks 60V Battery		MN0001	1.0000	EA		
3	GW60CHG GreenWorks 60V Battery Charger		MN0001	1.0000	EA		
4	GW21BAG GreenWorks 21" Mow Bag		MN0001	1.0000	EA		
*** End of Report ***							
10/3/2017 2:19 PM				Kent.Heitkamp			

28. The **Order Traveler** screen will appear. If you selected Order Traveler for the Production Order Type Business Rule (page 3-5).

Order Traveler Screen

The screenshot shows the 'Order Traveler' window. At the top is a toolbar with 'Print', 'Output', 'Send', 'Preview', and 'Reset' buttons. Below the toolbar is a 'Data Filter' section with a dropdown menu set to 'And' and a text field containing '[Order Number] Equals 00000016'. The main area of the window is divided into three columns. The left column, titled 'Include', contains five checkboxes: 'Production Notes', 'Operation Notes', 'Tooling', 'Materials', and 'BOM Instructions', all of which are checked. The middle column, titled 'Sort By', contains a list box with four options: 'Customer ID' (selected), 'Order Number', 'Start Date', and 'Assembly ID'. The right column contains two sections: 'View' with a 'Bar Codes' checkbox (unchecked) and 'Report Layout' with a 'Banded Rows' checkbox (checked).

- Select the information to Include on the Order Traveler: **Production Notes**, **Operation Notes**, **Tooling**, **Materials**, and **BOM Instructions**. You may choose any one or combination of these selections.
- Select the field by which to sort the list in the **Sort By** field: **Order Number**, **Customer ID**, **Start Date**, or **Assembly ID**.
- Mark the **Bar Codes** check box if you want bar codes to appear on the Picking List.
- Select the **Banded Rows** check box, if applicable, to highlight alternating lines on the report to make the report easier to read.

NOTE: Use the System Manager Print Preferences function to define the default setting for this check box. You can then override this default when you print the report.

- Select a command button:

Command Buttons

Name	Description
Reset	Set all fields to their defaults.
Preview	Preview the report on your monitor.
Output	Output the report as a .pdf file and save it.
Print	Print the report.

Order Traveler

Continental Products Unlimited										PAGE 1
Order Traveler										
Sorted by Customer ID										
Order No	00000016	Release No	1	Assembly ID	BE2160V80B60CS0002	Qty	1.0000	Customer ID	AX0040	
Start Date	10/3/2017	Due Date	10/3/2017	Revision No	1	Sales Order	00000108			
Instructions - Power Source - Battery Electric. Do you want a 17", 19 or 21 inch deck? - 21" Mower Deck. What size battery motor do you want? - 60V Battery Motor. Do you want extra batteries? - 60 V Battery. Do you want a battery charger? - 60 V Battery Charger. Do you want a bagger? - 21" Bag.										
Notes										
Req ID	Rtg Step	Operation ID	Machine Group ID	Machine Setup	Machine Run	Pcs				
Parent		Work Center ID	Labor Type ID	Labor Setup	Labor Run					
2	1			0.000	0.000	1.0000				
Component ID		Description		Unit	Planned Usage Qty	Est Scrap	Scrap	Qty Used	Pct Used	
GW19MD		GreenWorks 19" Mow Deck w/handle		EA	1.0000	0.0000	0.0000	0.0000	0.00	
GW60VM		GreenWorks 60 V Motor		EA	1.0000	0.0000	0.0000	0.0000	0.00	
GW60BAT		GreenWorks 60V Battery		EA	1.0000	0.0000	0.0000	0.0000	0.00	
GW60CHG		GreenWorks 60V Battery Charger		EA	1.0000	0.0000	0.0000	0.0000	0.00	
GW21BAG		GreenWorks 21" Mow Bag		EA	1.0000	0.0000	0.0000	0.0000	0.00	

10/3/2017 2:24 PM
*** End of Report ***
Kent,Heikamp

29. A notification dialog box will appear once the transaction is created. This also releases the production order if you marked the **Release Production Order** check box.

30. Once the transaction is created, you can use the MFG - Production Edit Released Orders function to edit the production order if necessary. See the MFG - Production Training Manual for details on the Edit Released Orders function.

MFG - Production Edit Released Orders Screen

MP Edit Released Orders

Order Number 00000015 Release Number 1 Req ID 1

Assembly

Assembly ID BE2160V60B60CBG0001

Revision Number 1 Est Start Date 10/3/2017

Location ID MN0001 Est Finish Date 10/3/2017

Routing Primary Act Start Date

Customer ID Axi040 Act Finish Date

Priority 0 PO Number

Quantity 1.0000 SO Number 00000107

Unit EA Order Status In Process

31. Make sure you test each of the conditions to verify you have set the configuration up the way you intended.

32. The Sales Order screen will appear with the Item selected from the Configurator questions' answers.

Orders - Order Screen Filled

SO Orders [F3]

Transaction No: 00000108 Base Currency: Transaction Type: New Net Due: 391.35

Header Documents Bill-To Ship-To Tax Payments Totals

Transaction Date: 10/3/2017 Batch Code: ##### Fiscal Period / Year: 10 / 2017
 Sold To: Axi040 Location ID: MN0001 Currency ID: USD Exch Rate: 1
 PO Number: Req Ship Date: 10/3/2017 Original Invoice: Orig Exch Rate: 1
 Notes: Blanket Number:

Re-sequence Detail PO Req Completed >>

Item ID	Description	Location ID	Qty Ordered	Qty Need...	Qty Shipp...	Unit	Unit Price	Ext Price	Actual Ship ...
BE2160V60B60CBG0002	Lawn mower with deck	MN0001	1.0000	1.0000	0.0000	EA	370.9500	370.95	

Record 2 of 2

Customer Attachments
 wis Electronics
 Contact: David Johanson
 102 Birch Street
 Wheatland, ND 58079
 Phone: (701)-603-2312
 Fax: (701)-603-2311
 Credit Status: 00002200000

Customer Credit:
 Credit Limit: 0.00
 Open Invo...: 1,060.52
 Transaction...: 905.84
 Credit Ava...: -1,965.36

Customer Aging:
 Current Due: 1,060.52

Item ID: BE2160V60B60CBG0002
 Lawn mower with deck
 Configure View Picture
 Location: MN0001
 Unit: EA

Availability Price

Availability	Price
Qty On Hand	0.0000
Qty Committed	0.0000
Qty Available	0.0000
Qty On Order	1.0000

The **Item ID** generated will be based on the **Part Number Type** field in the **General** section of the **Configuration Maintenance** screen (page 3-105).

Our example has **Smart + Sequence** as the Part Number Type. We entered codes for each component that are included in the Item ID to assist the warehouse when looking at the Item ID to determine the parts they need to pick.

Process the Sales Order as you would any Sales Order that was manually entered.

See the Sales Order Training Manual for further details on the remaining tabs and how to process the Sales Order.

Make sure you test each of the conditions to verify you have set up the configuration the way you intended.

GLOSSARY

actions

Actions are, actions to be performed at this point in the configuration. These actions could be adding another component to a Manufacturing Bill of Material configuration, displaying a Message to the user, or adding Labor or Freight.

active date

The date range for which a configuration is considered active and in effect.

assemble to order

A production environment where a product request can be assembled after the receipt of a Customer's order. The key components (bulk, semi finished, intermediate, subassembly, fabricated, purchased, packaging) used in the assembly or finished process are planned and possibly stocked in anticipation of the Customer order.

average cost

An inventory costing method. The average cost method calculates a weighted average cost by dividing the total cost of all units of an inventory item by the number of units on hand. See also FIFO, LIFO and standard cost.

average price

The average selling price of an item updated each time a purchase is entered.

back up

To make a copy of data for archival purposes.

base cost

Cost used for calculating prices as a markup from cost.

base currency

In TRAVERSE, the currency selected in the System Manager Company Setup Company Information function as the base currency. While TRAVERSE stores both base and foreign currencies, all other currencies are converted to base currency.

base price

A price assigned to each unit and used to calculate price breaks and customer level pricing in Sales Order.

bills of materials

The list of the components necessary to make a part of product and the amount of each component required.

company

In TRAVERSE, a business record associated with its own database files, tables, and menu of applications.

component

Part needed to make a parent item as shown on its bill of material.

condition

When setting up constraints, the criteria set to meet the requirements of the constraint.

configurator

A software tool to simplify order entry when a product may be sold with a number of features and options.

conversion

The process of updating existing data, programs, or applications to the current version. See also **installation**.

conversion factor

The portion of the base unit that is the alternate unit. For example; if the base unit were EACH and the alternate unit were BOX of 10, the conversion factor would be 10.

costing method

The method used for costing sales and inventory: FIFO, LIFO, average cost, and standard cost.

constraints

Constraints prevent the user from creating a configuration that is not available, or ensure that if the user creates a configuration, requirements are met, such as limiting the number of fish in a tank depending on the size of the tank, forcing a certain shipping method if the configured product is beyond a particular weight or size. You can also use constraints to change information based on situations that indicate something is awry.

discount

An amount subtracted from the full amount of a customer invoice in return for prompt payment.

distribution code

A code that indicates how amounts are to be distributed among general ledger accounts.

field

(1) A region on the screen that accepts input from the user. (2) One element of a record in a table. (3) Configurator fields are the questions that will be asked in the Sales Order transaction generation process.

firm planned order

An order which is treated as a planned order for the MRP calculation but one that does not be change, either in date or quantity, by the computer. Firm planned orders are changed manually and are used for Master production scheduling and to override the computer setting of order quantity, lead times, and safety stock, usually to overcome material or capacity problems.

function

A menu item that leads to a full screen. Most functions have a corresponding program.

groups

The groups section of the configuration maintenance, creates different groupings of questions. Each Group can focus on one aspect of the product--each Group has its own list of questions.

installation

The process of adding an application to an existing system. See also **conversion**.

inventory

The goods a business owns at a particular time, whether held for direct sale or for use in manufacturing goods for future sale. Manufacturing inventory is usually divided into raw material, work in process, and finished goods.

job shop environment

Tend to be high variety and low volume factories which make to order or to Customer specifications. Their Customers are very often other factories, so they tend not to produce consumer goods. Job shops tend to be highly flexible and their workers highly skilled. The shop floor layout would consist mostly of separate functionally specialized departments. Frequent change overs from one product to another are common.

list price

The basic published price for each unit without discounts added to it.

location

The place your inventory is stored—a van, a warehouse, etc.

lotted items

Items that are grouped for identification and given a lot number, such as items with the same shipping, receiving, or expiration date.

menu

A list of applications, functions, options, or other menus.

planned order

Generally a Production Order created by an MRP system.

price break

A price break set up by quantity, generally giving increasing discounts as the quantity of sales increase.

price ID

Customer-level pricing identifier that is useful for categories of items and items in particular locations.

product line

A category of similar items used for sorting.

program

A self-contained list of executable code, written and implemented to do a task. Most programs are represented by a function on a menu.

record

A unit of information that has other pieces of information assigned to it.

restore

To bring information back to its original place and condition.

scrap

Materials outside of specifications and possessing characteristics that make rework impractical. For example; a raw material with a 2% scrap factor is assumed to be something in which, when an assembly is put together and the material is used, about 2% is lost or scrapped. It could be that 2% of the material is defective or is lost due to the nature of the process. The reason a scrap factor is set up is to enable you to actually track these quantities in the hopes of improving your process. Scrap should be considered a variable quantity and expense.

The unexpected loss of a completed part for any reason.

scrap factor

A percentage factor used in the product structure to increase gross needed requirements to account for anticipated scrap.

serialized item

An item that is identified by a serial number, such as an appliance, a computer, a stereo system.

setup time

The time it takes to adjust a machine or fit a tool to make a particular item. Part of the lead time which does not vary with the order quantity.

smart ID

The Smart ID creates a part number based on the specific smart ID's created as part of the configuration.

standard cost

A costing method that is an estimate of costs you set. For example, in a manufacturing operation the standard cost is the cost of the item plus costs of raw materials, labor, and overhead. See also average cost, FIFO, and LIFO.

tab order

The order in which the groups of a configuration, or the fields are presented to the user when answering questions during the transaction entry process.

table

(1) A grid that holds records and is visible. (2) An object that stores data.

transaction

An exchange between a business and another party, leading to an accounting entry, which is recorded in the GL Journal.

traveler

A copy of the manufacturing order that actually moves with the work through the shop.

validate

Verify the setup of the configuration is error free and acceptable to the standards set within the programming of the Configurator.

variables

Variables can be used to manage custom fields during the configuration entry process. These custom fields can then be used in the options.

wait time

Time required after an operation or process is complete for curing, drying, setting, cooling. This time is required after the process is complete but before the next process can begin or before it can be moved to the next step. It does not involve any trackable machine or labor time.