

Product Configurator

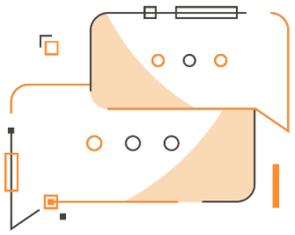
product configuration through item codes or variants
in Microsoft Dynamics 365 Business Central



Product Configurator

App for Microsoft Dynamics 365 Business Central

The Eos Solutions Product Configurator (CFG) app allows, on sales side, to manage product configuration in Dynamics 365 Business Central.



Do you want the system to automatically create item variants or item codes based on the combination of characteristics selected in the Sales Order? Do you need to have different sales prices depending on the value of the characteristics of the item?

How it works

Thanks to the Product Configurator app you can:

- Create automatic item variants or, alternatively, item codes based on the combination of selected characteristics
- Create and manage the price matrix that allows you to have different selling prices, according to the characteristic values
- Manage price surcharge and optionals
- Search for posted documents by characteristics

Quick Guide

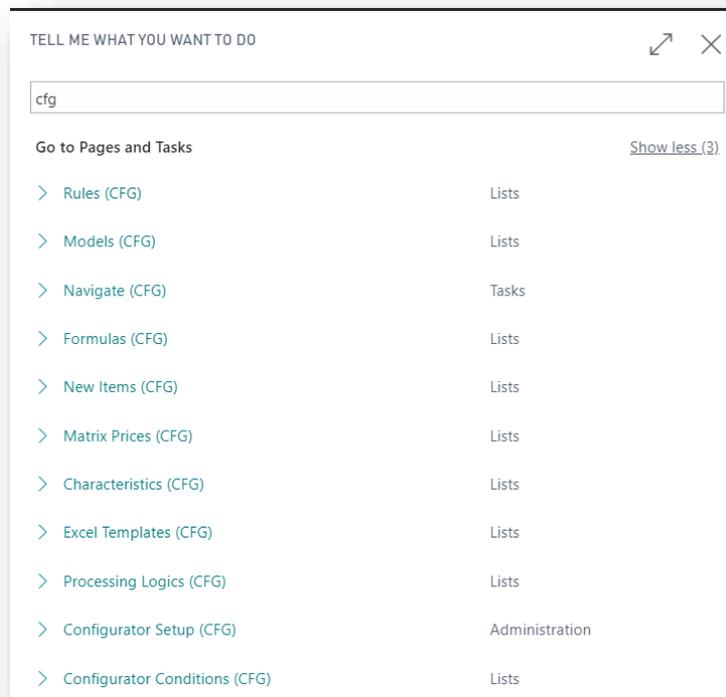
Ready in a few steps:

1. Enter the Setup
2. Create Rules and Relations
3. Create a Sales Order and let the system create new items/variants based on the characteristics selected



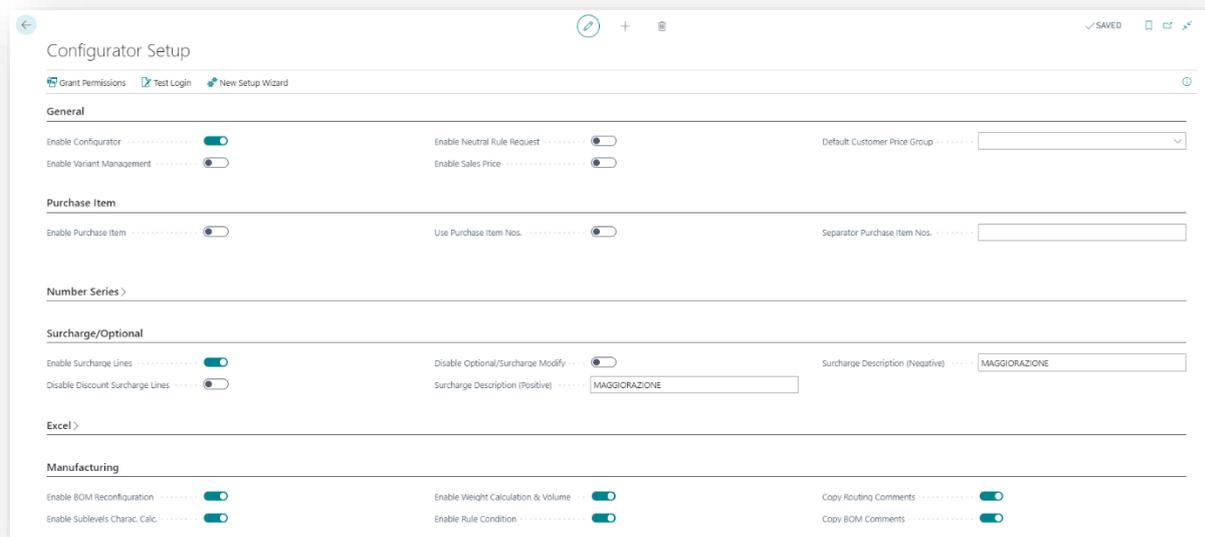
Product Configurator - SUMMARY

Press ALT + Q and digit "CFG" for a list of the features involved:



Configurator Setup (CFG)

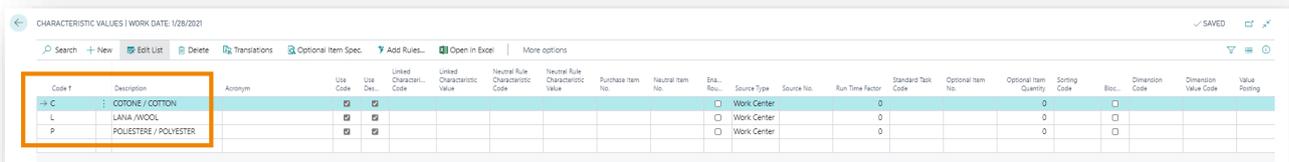
On the setup page, the Configurator must be enabled on the General tab. You can also activate the options you want:



Define Characteristics

Characteristics can be Structure Type or Measure Type.

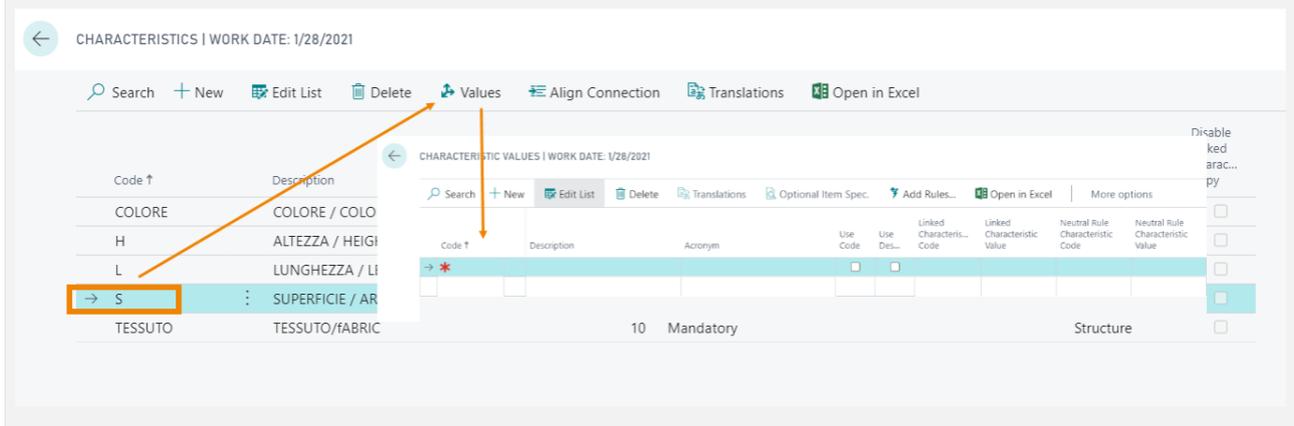
From Values you can determine which values the **structure type** characteristic can have:



Code ↑	Description	Acronym	Use Code	Use Des...	Linked Characteristic Code	Linked Characteristic Value	Neutral Rule Characteristic Code	Neutral Rule Characteristic Value	Purchase Item No.	Neutral Item No.	Ena. Rou...	Source Type	Source No.	Run Time Factor	Standard Task Code	Optional Item No.	Optional Item Quantity	Sorting Code	Bloc...	Dimension Code	Dimension Value Code	Value Pcting
C	COFONE / COTTON		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								Work Center		0			0		<input type="checkbox"/>			
L	LANA / WOOL		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								Work Center		0			0		<input type="checkbox"/>			
P	POLIESTERE / POLYESTER		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>								Work Center		0			0		<input type="checkbox"/>			

N.B.

A list of values cannot be defined for the **measure type characteristic**. It will be defined within the Rules as a range from/to.



CHARACTERISTICS | WORK DATE: 1/28/2021

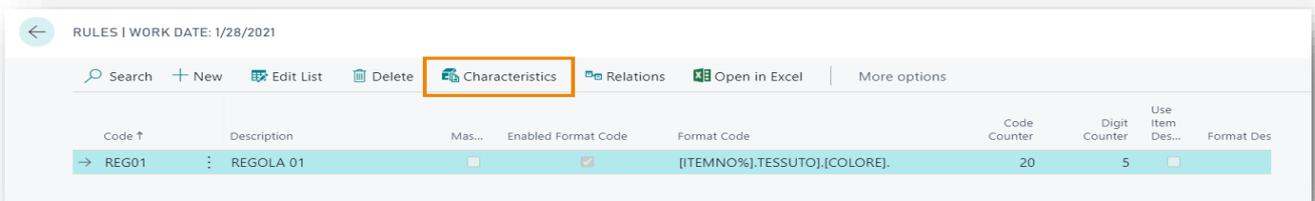
Search + New Edit List Delete Values Align Connection Translations Open in Excel

Code ↑	Description	Acronym	Use Code	Use Des...	Linked Characteristic Code	Linked Characteristic Value	Neutral Rule Characteristic Code	Neutral Rule Characteristic Value	Purchase Item No.	Neutral Item No.	Ena. Rou...	Source Type	Source No.	Run Time Factor	Standard Task Code	Optional Item No.	Optional Item Quantity	Sorting Code	Bloc...	Dimension Code	Dimension Value Code	Value Pcting
COLORE	COLORE / COLO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															<input type="checkbox"/>			
H	ALTEZZA / HEIGI		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															<input type="checkbox"/>			
L	LUNGHEZZA / LI		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															<input type="checkbox"/>			
S	SUPERFICIE / AR		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															<input type="checkbox"/>			
TESSUTO	TESSUTO/FABRIC		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>															<input type="checkbox"/>			

10 Mandatory Structure

Define Rules

From Rules (CFG) we could determine the rules and characteristics that each rule provides:



RULES | WORK DATE: 1/28/2021

Search + New Edit List Delete Characteristics Relations Open in Excel More options

Code ↑	Description	Mas...	Enabled Format Code	Format Code	Code Counter	Digit Counter	Use Item Des...	Format Des
REG01	REGOLA 01	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[ITEMNO%].TESSUTO],[COLORE].	20	5	<input type="checkbox"/>	

RULE CHARACTERISTICS | WORK DATE: 1/28/2021

Search + New Edit List Delete **Values** Open in Excel

Characteristic Code ↑	Characteristic Description	Sequence ↑	Mandatory	Connection	Price	Not Editable	Hide Cha...	Price List Surc...	Nez... Item	From Value	To Value	Style	Proc... In Excel	Get Out... From Excel	Trig... Cust... Code	Get Out... From Cust...
→ TESSUTO	TESSUTO / ABBRICO	10	Mandatory		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COLORE	COLORE / COLOR	20	Mandatory		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100	200	StrongAcc...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H	ALTEZZA / HEIGHT	30	Mandatory		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L	LUNGHEZZA / LENGHT	40	Mandatory		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S	SUPERFICIE / AREA	50	Mandatory		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

From **Values** we determine the values that the characteristic can take within the Rule

RULES | WORK DATE: 1/28/2021

Search + New Edit List Delete Characteristics **Relations** Open in Excel More options

Code ↑	Description	Mas...	Enabled	Format Code	Format Code	Code Counter	Digit Counter	Use Item Des...	Format Des
→ REG01	REGOLA 01	<input type="checkbox"/>	<input checked="" type="checkbox"/>		[ITEMNO%].[TESSUTO].[COLORE].	20	5	<input type="checkbox"/>	

From **Relations** we establish the relations between the rules

RULE RELATIONS | WORK DATE: 1/28/2021

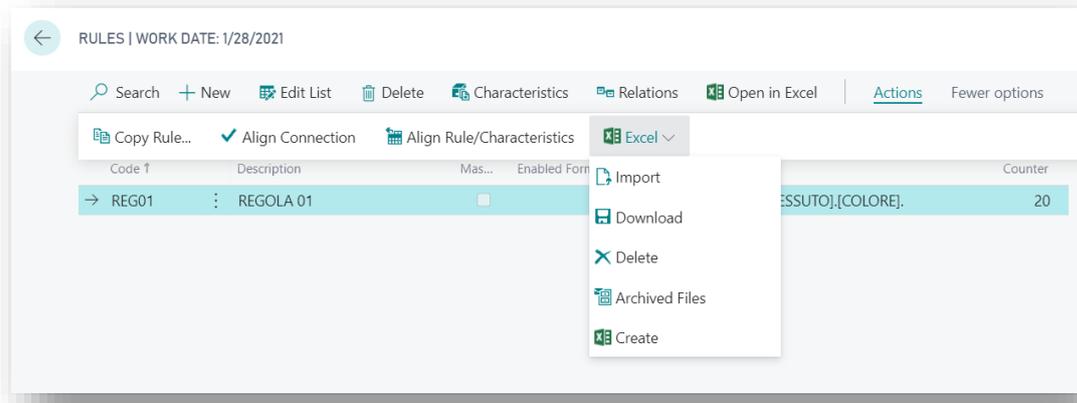
Search + New Edit List Delete Open in Excel

Relation Type	Primary Characteristic Code ↑	Primary Characteristic Value ↑	Condition Code	Secondary Characteristic Code ↑	Secondary Characteristic Value ↑	Transfer Value Formula	Rounding Precision	Formula Code	Error Message
→ Transfer Value	H			S		[H]*[L]/10000	0.01		
Transfer Value	L			S		[H]*[L]/10000	0.01		
Filter	TESSUTO	P		COLORE	01 02 03 04 05		0		

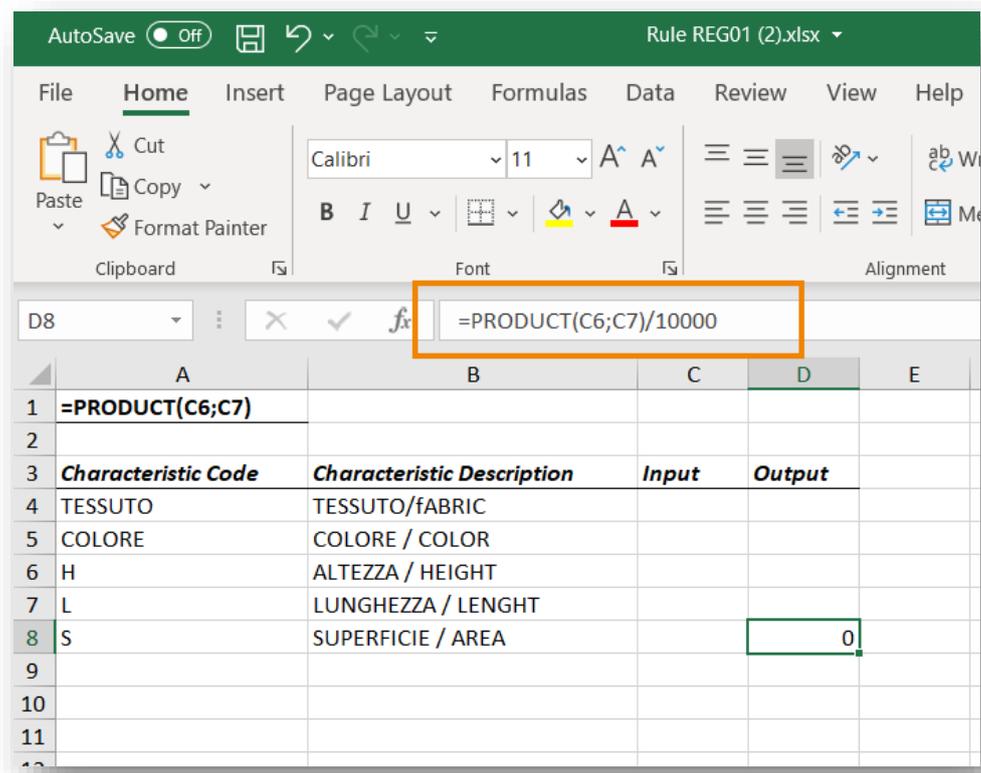
Relations: Excel integration

It is also possible to set relations between characteristics through Excel.

From the Rules (CFG) page, by pressing Actions->Excel->Create, we can create and associate a template with the rule to recalculate characteristics values by setting the calculation formulas within the Excel sheet itself:



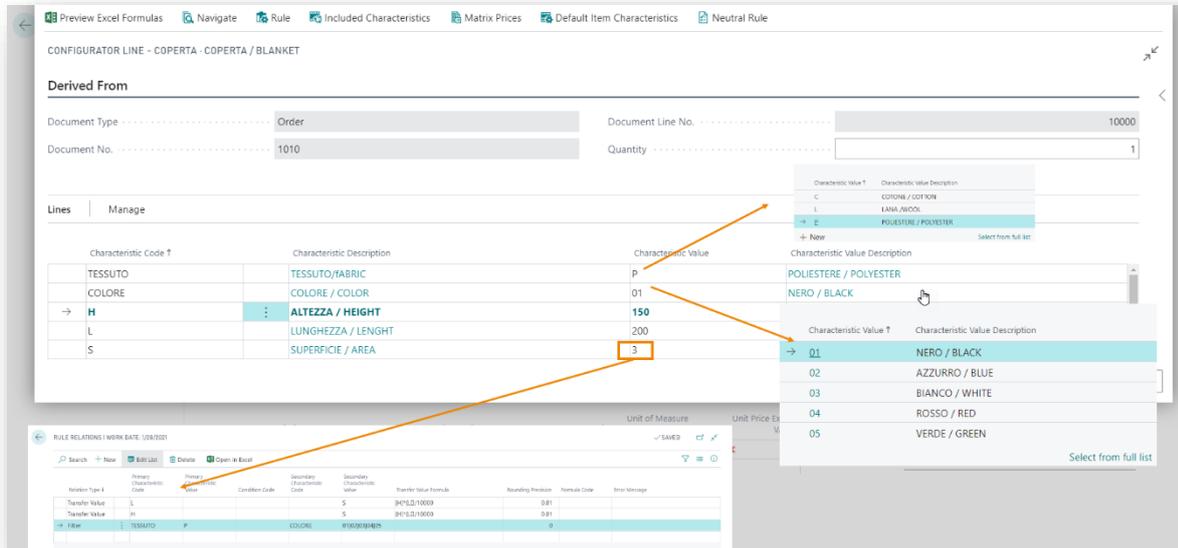
In the Input and Output columns, you can set up formulas, for example, the Surface should be calculated as a product between Height and Length/10000.



Save the document and press on Actions->Excel->Import.

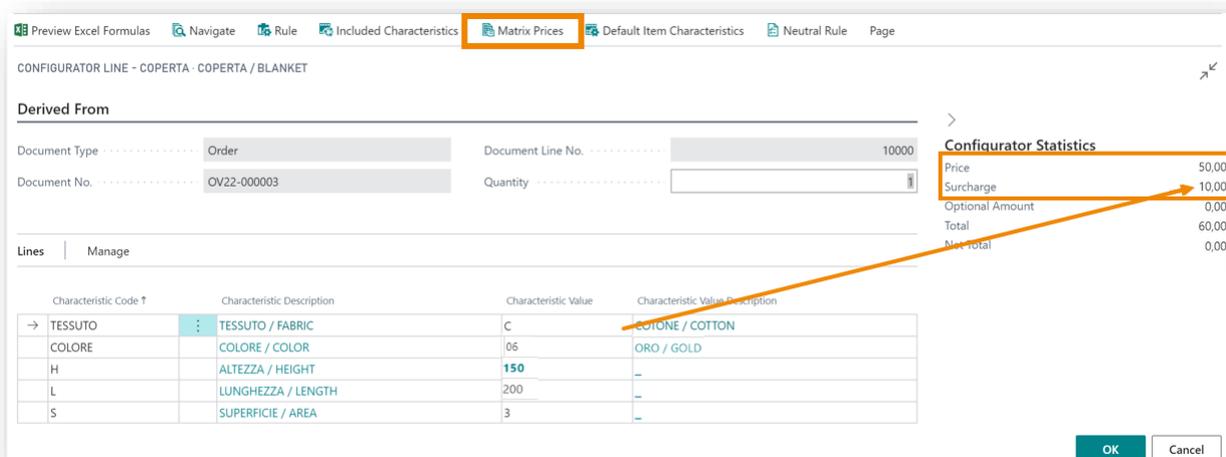
Sales Order

Let's open the Sales Orders page and create a New Order:



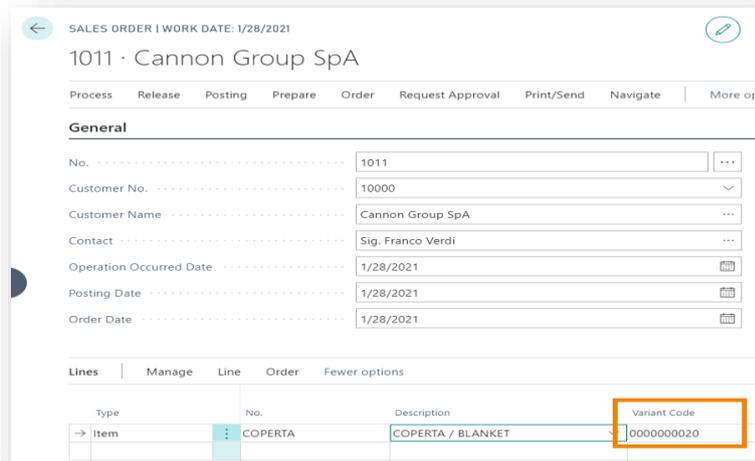
When we insert the item on the order line, the window opens where the configurator asks you to fill in the different characteristics of the "Rule 01", that we applied to the "Blanket" Item Card.

The Factbox on the right shows the items that are updated according to the options chosen in the lines (e.g. price if we choose Wool: 110 euros, if we choose Cotton: 50 euros, if we choose Polyester: 20 euros):



Item Variants

If Setup has enabled item variant management, when we fill in the order, the system will not report a new item on the lines, but a variant of the item that we indicated in the Line No.



SALES ORDER | WORK DATE: 1/28/2021

1011 · Cannon Group SpA

Process Release Posting Prepare Order Request Approval Print/Send Navigate More opt

General

No. 1011

Customer No. 10000

Customer Name Cannon Group SpA

Contact Sig. Franco Verdi

Operation Occurred Date 1/28/2021

Posting Date 1/28/2021

Order Date 1/28/2021

Lines | Manage Line Order Fewer options

Type	No.	Description	Variant Code
→ Item	COPERTA	COPERTA / BLANKET	0000000020

All generated variants we can see in the **Item Card** from Actions->Item->Variants, which Routings and Bom's are linked to.

The **price matrix** allows you to manage sales prices in a parametric way depending on the characteristics of the product. The main features are:

- Prices for Customer Price Group or for specific customer.
- Prices for characteristics.
- Currency, starting / ending date, minimum quantity.
- Surcharges management.
- Price List Surcharges management.

Subscription

Some features of the Product Configurator app require a subscription. The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard

Contact us for more info:

www.eos-solutions.it/en/contact-support.html



www.eos-solutions.it