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Advanced Product Configurator

Advanced Product Configurator for Microsoft Dynamics 365 Business Central is an application designed for creating:

- item cards,
- item variants and
- production orders

with the use of predefined attributes, attribute values and dependencies between the attributes.

With its advanced product configuration capabilities, the application enables your company to meet the specific needs of its clients and develop a range of competitive and diverse products, ensuring improved production efficiency at the same time.

Advanced Product Configurator has been developed through an extensive collaboration of engineers and developers, whcich ensured a perfect ratio of ergonomics and usability in such an advanced tool.

The solution enables the users to set up the product configurator themselves, without the need to modify the Business Central system or seek help of external consultants.

Advanced Product Configurator is a versatile solution that can be implemented both in a trading company, where the products and product sets are typically assembled to meet the needs of a particular customer, and in a manufacturing company, where the parameters of produced goods must be compatible with an individual customer order.

Functionality

Advanced Product Configurator enables the automatic creation of item and item variant cards and production orders based on configuration type setup. The system, based on attribute values, enables automatic generation of production or assembly BOM, routings, item descriptions and translations, sales and purchase prices, item extended texts. In addition, the application allows you to automatically calculate the net weight and create additional item units of measure. The country of origin code and vendor number can be assigned automatically based on attributes.

- Application Setup
- Work with Advanced Product Configurator

Administration

- Import/Export Setup Wizard
- Created Card Administration

Get started with Advanced Product Configurator

To get started with Dynamics 365 Business Central and Advanced Product Configurator, contact IT.integro at AppSourceLeads@it.integro.pl.

Product Lifecycle Policy

- Product Lifecycle Policy

Business Centaral - Base Application

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Advanced Product Configurator is based on the technology and functionality of Microsoft Dynamics 365 Business Central. Business Central, as a popular ERP system, supports the management of small and mid-sized companies worldwide, enabling them to automate and streamline their business processes in many business areas.

> **TIP**
>
> Documentation for Business Central, the base application, has been published on IT.integro Docs.

See Also

Advanced Product Configurator on the Microsoft AppSource marketplace

Policies for Product Documentation and Related Online Documents

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New and Planned

This article contains links to articles on the development and release plans for applications available within Advanced Product Configurator.

TO	SEE
Learn more about Advanced Product Configurator roadmap	Advanced Product Configurator Roadmap
Find information on functional changes and improvements	Releases

See Also

Product Lifecycle Policy

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Advanced Product Configurator Roadmap

This article provides information about the Advanced Product Configurator roadmap.

> **IMPORTANT**
>
> Deadlines for the completion of tasks that have been specified in the table are subject to change depending on the current priorities. Primarily, the priorities for development tasks related to individual functionalities depend on:
>
> - legal requirements, taking into account the applicable deadlines for providing end users with functionalities that support these requirements,
> - unforeseen changes in the scope of legal requirements,
> - technological changes and changes in the base application introduced by Microsoft, which have an impact on ensuring the compatibility,
> - technological changes and changes in the base application introduced by Microsoft, which have an impact on development tasks within the application,
> - technological and legal changes within dependent applications,
> - demand reported by project teams and IT.integro partners,
> - importance for the operation of the application in the context of related functionalities.

> **IMPORTANT**
>
> The rules for maintaining the compatibility of applications available within Advanced Product Configurator with Dynamics 365 Business Central have been described in Product Lifecycle Policy article.

In the case of planned functionalities, the dates declared may be changed; it is also possible that development tasks and functionality release may be cancelled.

Planned development tasks

The table in this section shows the development plans and roadmap for Advanced Product Configurator.

The functionalities included in the application roadmaps are developed:

- due to new legal requirements,
- as improvements in the functionality of the application,
- as application performance improvements resulting from technological changes.

The table also specifies the status of development tasks for individual functionalities:

- □□ symbol - means that development work on a given functionality has been completed;
- the **In progress** status means that the development team is working on a given functionality to be released, and the release date has been specified in the Planned Date column in a respective line;
- the **To be planned** status means that development has not started yet and no release date has been scheduled. The release date will be determined depending on the priorities set.

FUNCTIONALITY	IMPLEMENTATION STATUS	PLANNED RELEASE DATE
Fixed values for formulas	To be planned	--

See Also

Releases

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Releases

This article lists the released versions of Advanced Product Configurator for Microsoft Dynamics 365 Business Central.

> **IMPORTANT**
>
> If a lower version of Microsoft Dynamics 365 Business Central than the version specified in the table was installed, use Advanced Product Configurator that is compatible with Microsoft Dynamics 365 Business Central version.

> **IMPORTANT**
>
> Release Notes for the previous versions have been published in the IT.integro Product Portal that is available for IT.integro partners.

Versions

See Also

Administration

Installation Procedure Support - Contact your Dynamics 365 Business Central partner

Advanced Product Configurator on the Microsoft AppSource marketplace

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Administration

Articles about managing the Advanced Product Configurator extensions for Dynamics 365 Business Central describe system requirements, preliminary requirements (including necessary subordinate applications) as well as installation and update processes.

TO	SEE
Learn more about system requirements of the application	System Requirements
Get to know how to install the application	Installation
Learn more about the extension update process in Business Central	Application Upgrade

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System Requirements

System requirements for Advanced Product Configurator are the same as for Business Central Microsoft Dynamics 365 on-premises and online. The requirements for Microsoft Dynamics 365 Business Central online have been described in System Requirements for Dynamics 365 Business Central.

See Also

Advanced Product Configurator Installation

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Installation

The following articles describe the installation process for Advanced Product Configurator, taking into account the necessary dependent applications:

- Advanced Product Configurator.

The process of installing dependent applications is described for both types of Dynamics 365 Business Central environment: online or on-premises.

TO	SEE
Understand the Advanced Product Configurator installation process	Advanced Product Configurator Installation

See Also

Advanced Product Configurator

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Advanced Product Configurator Installation

This article describes the prerequisites and installation process for the Advanced Product Configurator for Dynamics 365 Business Central online and on-premises.

Prerequisities

Before installing the Advanced Product Configurator you must install the

- **License Library App** (to learn more about the installation see License Library App Installation).

Installing the Application for Business Central on-Premises

To install the Advanced Product Configurator for Business Central on-premises, perform the following steps:

1. Download the application from the IT.integro Product Portal. Add the Advanced Product Configurator to the customer license.

> **IMPORTANT**
>
> The IT.integro Product Portal can be accessed only by authorized IT.integro partners.

> **CAUTION**
>
> When installing the application, you have to be assisted by an authorized IT.integro partner.

2. Run Dynamics NAV Administration Shell as an administrator.
3. To install the Advanced Product Configurator, run the command:

```
Publish-NAVApp -ServerInstance TwójDynamicsNAVServer -Path ".\IT.integro sp. z o.o._Advanced Product Configurator.app"
```

4. To synchronize the Advanced Product Configurator, run the command:

```
Sync-NAVApp -ServerInstance TwójDynamicsNAVServer -Name "Nazwa Extension" -Version NrWersji -Tenant [Tenant1, Tenant 2, defaul
t]
```

> **TIP**
>
> The Tenant parameter can be skipped for a Single-Tenant instance or set as default. For Multi Tenant instances, each tenant to be synchronized has to be listed.

To install the Advanced Product Configurator, run the command:

```
Install-NAVApp -ServerInstance TwójDynamicsNAVServer -Name "Nazwa Extension" -Tenant [Tenant1, Tenant 2, default]
```

> **TIP**

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It is recommended to install the latest application version available.

Installing the Application for Business Central Online

To install the Advanced Product Configurator for Business Central online, perform the following steps:

1. Download the app from the AppSource.
2. Install and register the Advanced Product Configurator in accordance with the standard procedure for Dynamics 365 Business Central extensions. The procedure is described in the articles: Customizing Business Central Online Using Extensions and Publishing and Installing an Extension.

TIP

It is recommended to install the latest application version available.

See Also

License Library App Installation

Publishing and Installing an Extension.

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Upgrade Application

This article describes the extension update process for Dynamics 365 Business Central.

Update the app for Business Central on-premises

To update the Dynamics 365 Business Central application extension for Business Central on-premises, follow these steps:

1. Run Dynamics NAV Administration Shell as an administrator.
2. To publish the application, run the following command:

```
Publish-NAVApp -ServerInstance TwójDynamicsNAVServer -Path ".\IT.integro sp. z o.o._Advanced Product Configurator.app"
```

3. To synchronize the application, run the command:

```
Sync-NAVApp -ServerInstance TwójDynamicsNAVServer -Name "Nazwa Extension" -Version NrWersji
```

4. To update the data, run the command:

```
Start-NAVAppDataUpgrade -ServerInstance TwójDynamicsNAVServer -Name "Nazwa Extension" -Version NrWersji
```

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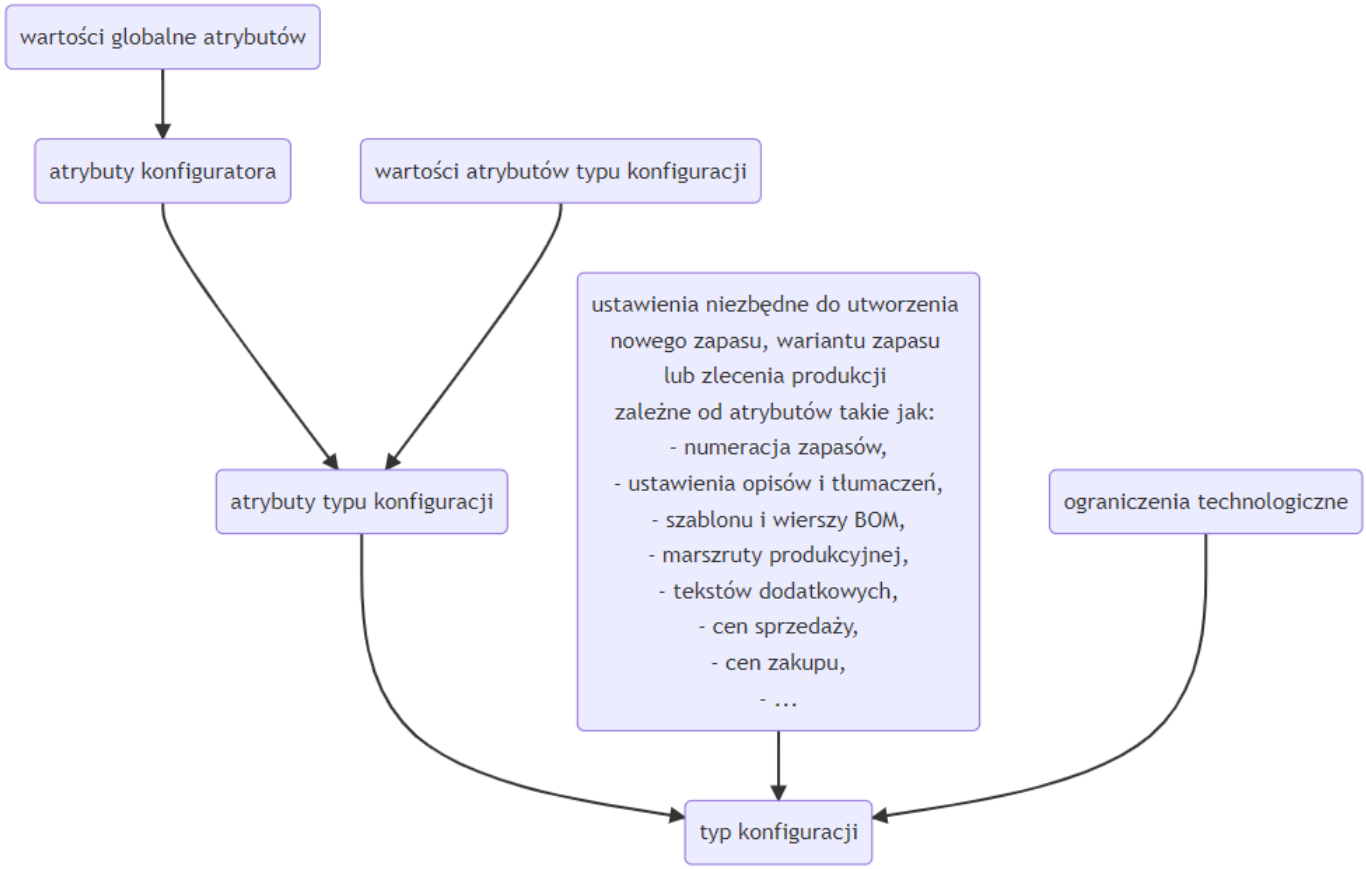
Application Setup

It is necessary to set up the Advanced Product Configurator before you start working with the application. The setup structure is based on the **Configuration Type** card. A configuration type is a set of configurable items such as bicycles, tables, computers etc. that are specified by the same attributes, for example height, width, color, processor type. The **Configuration Type** card is linked with many settings that automate the process of creating new items, BOMs, production and assembly orders etc. In the further steps of the process, the **Configuration Type** card is used (by the **Configuration** card) to automatically create items, item variants, production orders etc.

Scheme presenting a simplified setup structure



Scheme of the configuration process

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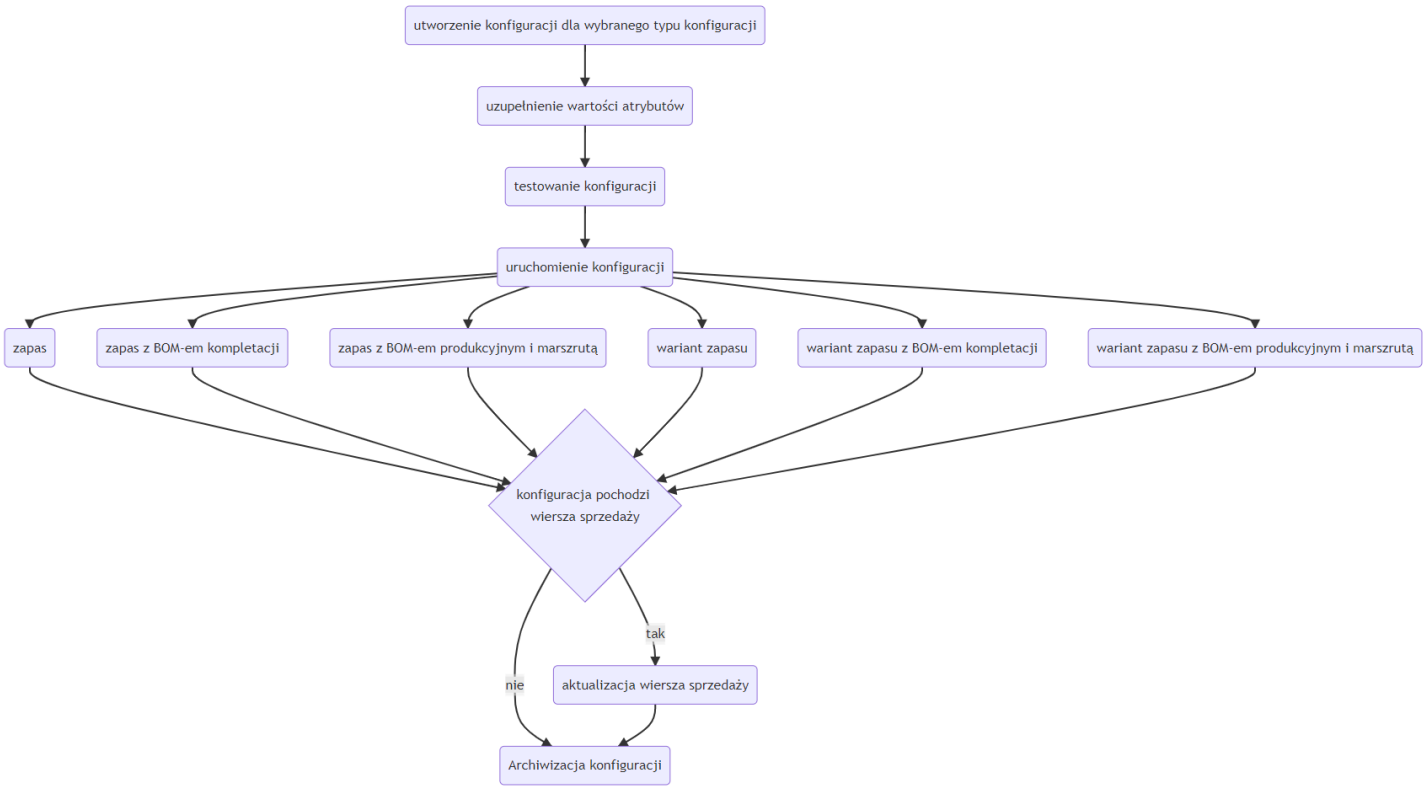

TO	SEE
Learn how to define application setup	Main Setup
Learn how to define user setup	User Setup
Learn how to define attributes in Advanced Product Configurator	Configurator Attributes
Learn how to set up the **Configuration Type** card	Configuration Type
Learn more about the configuration process	Working with Advanced Item Configurator

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Main Setup

To enter or modify the main setup for Advanced Product Configurator:

1. Choose the icon, enter **Item Configurator Setup**, and then select a related link.
2. On the **Item Configurator Setup** enter or modify the settings. Fill in the following fields:
    - **Language Code** - Specifies the language code that will be used to translate attributes and attribute values in the configurator functionality.
    - **Hide Confirmation on Global Attribute Update** - Specifies whether the user will be prompted for confirmation when updating existing global attribute values.
    - **Block Delete Sales Lines** - Specifies whether deleting sales lines with an associated configuration is allowed.
    - **Configuration Nos.** - Specifies configuration number series.

TIP

The language code can also be specified independently for each user using the user setup.

See Also

User Setup

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User Setup

To enter or modify user setup for Advanced Product Configurator:

1. Choose the icon, enter **Item Configurator User Setup**, and then select a related link.
2. Enter or modify the setup for the selected user.
3. On the **Item Configurator User Setup** page, complete the setup for each user.

- **User ID** – Specifies the identifier of the user.
- **Allow Use Not Certified Configuration Type** - Specifies whether the user can use uncertified configuration types.
- **Allow Modify Item Template** - Specifies whether the user can modify the **Item** card used as a template in the configuration type.
- **Allow Modify Conf. Type** - Specifies whether the user can modify the **Configuration Type** card.
- **Language Code** - Specifies the language code that will be used to translate attributes and attribute values in the configurator functionality.

See Also

Configuration Type

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Configurator Attributes

The Advanced Product Configurator functionality enables the user to define any number of attributes such as height, width, color, processor type etc. These attributes can be assigned to configuration types correspondingly. Each configuration type can be defined by different attributes.

TO	SEE
Learn how to define attributes	Configurator Attribute Setup
Learn how to define attribute translations	Attribute Translation Setup
Learn how to define global attribute value translations	Global Attribute Value Translation Setup
Learn how to define attribute value translations	Attribute Value Translation Setup
Learn how to define global attribute value translations	Global Attribute Value Translation Setup

See Also

Configuration Type

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Configurator Attribute Setup

To define a list of attributes available in Advanced Product Configurator:

1. Choose the icon, enter **Configurator Attributes**, and then select a related link.
2. Add new lines or modify the existing ones on the **Configurator Attributes** page. Fill in the following fields:

- **Code** - Specifies the unique attribute code.
- **Description** - Specifies the attribute description.
- **Value Type** - Specifies the possible attribute value type. The following options are available:
    - **Text** - Specifies that attribute values are text values (for example: Color - red, green, blue).
    - **Decimal** - Specifies that attribute values are decimals.
    - **Integer** - Specifies that attribute values are integers.
- **Unit Description** - Specifies the attribute value unit of measure description (for example mm, cm, km). This field value is for informational purposes only.
- **Only Global Attributes Values** - Specifies, if attributes can only have global values. If this field is selected, only global values can be chosen as attributes in the **Configuration Type** card. Otherwise, the user can choose values specific for a chosen configuration type (other than global values) in the **Configuration Type** card.
- **Do Not Add Attribute Global Values** - Specifies, if global attribute values should be copied to configuration type attribute values after assigning attributes to configuration types.
- **Attribute Sequence** - Specifies the position of an attribute on the list of attributes assigned to the **Configuration Type** card.

See Also

Attribute Translation Setup

Global Attribute Value Setup

Attribute Value Translation Setup

Global Attribute Value Translation Setup

Item Description Setup

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Attribute Translation Setup

The Advanced Product Configurator setup features can be used to automatically generate item description translations and extended texts. Attribute translations:

- enable displaying attribute description translations depending on application or user setup,
- can be used to automatically generate translations, item descriptions and extended texts at the same time.

Setup

To change the translation setup:

1. Choose the icon, enter **Configurator Attributes**, and then select a related link.
2. Choose an attribute from the list and choose the **Translations** action from the **Navigate** tab.
3. Add new setup lines or modify the existing ones.
4. Open the **Attribute Translations** card and fill in the following fields:
    - **Language Code** - Specifies the language code of the translation.
    - **Description** - Specifies the attribute description in the chosen language.
    - **Unit Description** - Specifies the description of the attribute unit of measure in a chosen language (for example mm, cm, km).

See Also

Attribute Value Translation Setup

Global Attribute Value Translation Setup

Item / Variant Description Setup

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Global Attribute Value Setup

Advanced Product Configurator enables defining global attribute values, which are common for all types of configurations. This functionality allows for defining a color palette or item sizes that will be common for the configuration.

Setup

To change the global value attribute setup:

1. Choose the icon, enter **Configurator Attributes**, and then select a related link.
2. Choose an attribute from the configurator attributes list and choose the **Attribute Values** action from the **Navigate** tab.
3. Add new lines or modify the existing ones on the **Configurator Attribute Global Values** page. Fill in the following field values:
    - **Value Code** - Specifies a unique attribute value code.
    - **Value Description** - Specifies an attribute value description.
    - **Sequence** - Specifies the sequence in which values are shown on the selection list.
    - **Blocked** - Specifies, if the attribute value is blocked. Blocked values cannot be used to create new configurations.

See Also

Global Attribute Value Translation Setup

Configurator Attribute Setup

Attribute Translation Setup

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Global Attribute Value Translation Setup

Advanced Product Configurator enables you to define global attribute values and global translations of attributes which are common for all types of configurations. Application settings allow the user to automatically generate item description translations and extended texts. After setting up global attribute value translations, you can:

- display configuration type description translations depending on the application or user setup,
- automatically generate translations, item descriptions and extended texts at the same time.

Setup

To change the setup:

1. Choose the icon, enter **Configurator Attributes**, and then select a related link.
2. On the **Configurator Attributes** tab choose the **Attribute Values** action on the **Navigate** tab and the **Configurator Attribute Global Values** card will be opened.
3. On the **Configurator Attribute Global Values** card, select an attribute value from the list and choose the **Translations** action on the **Navigate** tab.
4. On the **Translations of Configuration Type Global Attribute Value** page, fill in the following fields:

- **Language Code** - Specifies the language code of the translation.
- **Value Description** - Specifies an attribute value description in a chosen language.

See Also

Configuration Type Translation Setup

Attribute Translation Setup

Configuration Type Attribute Value Translations

Item Description Setup

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Configuration Type

In Advanced Product Configurator, a configuration type is a set of configurable items such as bicycles, tables, computers etc. that are specified by the same attributes, for example height, width, color or processor type.

A configuration type is linked to settings that specify:

- attributes and possible attribute values,
- attribute dependencies,
- numbering of items and item variants,
- auto creation of descriptions, generating extended texts and translations,
- technological limitations,
- BOM components,
- a routing,
- lead time,
- units of measure and their dependencies,
- purchase and sales prices,
- country of origin.

IMPORTANT

A configuration type should be created or set up by the user or a team having the necessary technological and product knowledge.

In the further steps of the process, the **Configuration Type** card is used (by the **Configuration** card) to automatically create items, item variants, production orders etc.

TO	SEE
Learn how to create the card **Configuration Type**	Configuration Type Setup
Learn how to create the setup translations for a configuration type	Configuration Type Translation Setup

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Configuration Type Setup

A configuration type is a set of configurable items such as bicycles, tables, computers etc. that are specified by the same attributes, for example height, width, color or processor type.

Setup

To change the setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. On **Configuration Types** page, choose **New** to create a new configuration type or choose the existing configuration type and open its card in edit mode to make changes.
3. After opening **Configuration Type** card, fill in or modify the below fields.

The card is divided into three sections:

- **General** section - Includes fields linked with the most important settings.
    - **Code** - Specifies the unique configuration type code. The field value can be filled in automatically from the number series or manually (determined by the settings).
    - **Description** - Specifies a description of the configuration.
    - **Status** - Specifies a configuration type status (filled in automatically).
    - **Configuration Output** - Specifies the configuration output. This value specifies which item BOM type will be created after running the configuration related to this configuration type. The following options are available:
        - **Item - Production BOM** - A new item card will be created with a new production BOM and a routing.
        - **Item - Assembly BOM** - A new item card is created with a new assembly BOM.
        - **Item Variant - Assembly BOM** - A new variant for the item card specified in **Template Item No.** field will be created in this configuration type as well as a new assembly BOM for the created item card variant.
        - **Item Variant - Production BOM** - A new variant for the item card specified in **Template Item No.** field will be created in this configuration type. Assembly BOM and a routing will be created and assigned to a stockkeeping unit of a new item variant.
        - **Production Order** - A new production BOM and a routing will be created in this configuration type as well as a new production order for the new item that is set in **Template Item No.** field and linked to this new BOM and a routing.
    - **Template Item No.** - Specifies the template item number. **Template Item No.** will be used as a template when creating a new item using the configuration functionality. All necessary information for new item will be taken from the Item template such as: dimension settings, invoicing information, replenishment etc.
    - **Routing No.** - Specifies the static routing no. that will be used when creating a new item/item variant with a production BOM or a production order. For details, read Auto Routing Creation.
    - **Item Category Code** - Specifies the item category code. The item category code should be used for grouping configuration types.
    - **BOM Unit of Measure** - Specifies the BOM unit of measure for the new item BOM.
    - **Auto Certify BOM** - Specifies, if the newly created production BOM will be certified automatically.
    - **No. of Configurations** - Specifies the number of the existing configurations. The value is calculated automatically.
    - **No of Items** - Specifies the number of the existing items. The value is calculated automatically and the field is not

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editable.

- **Validation Errors** - The number of configuration type validation errors.

- **Parent Configuration** section - Contains fields related to the parent configuration setup. This setup is used when components of a configured item are other configurable items. For details, read Parent Configurations.
- **Auto No.** section - Includes fields related to the new item numbers or item variant codes auto numbering settings.For details read, Define Counter for Configuration Type.
- **Default Configuration Settings** section - Includes the fields linked by the settings that allow the user to enable or disable the automation used in the fields of activity of the Advanced Product Configurator for a specific configuration.
  - **Skip Auto Base UOM** - Specifies, if the automatic creation of base and additional units of measure is to be skipped.
  - **Skip Auto BOM** - Specifies, if the automatic creation of the production or assembly BOM is to be skipped.
  - **Skip Auto Price Calculation** - Specifies, if the automatic creation of item sales prices is to be skipped.
  - **Skip Auto Purchase Price Calculation** - Specifies, if the automatic creation of item purchase prices is to be skipped.
  - **Skip Auto Lead Time Calculation** - Specifies whether the automatic item lead time calculation is to be skipped.
  - **Skip Auto Description** - Specifies, if the automatic creation of item description is to be skipped.
  - **Skip Auto No.** - Specifies, if the automatic creation of item number is to be skipped.
  - **Skip Auto Extended Text** - Specifies, if the automatic creation of item extended text is to be skipped.
  - **Skip Auto Resources Calculation** - Specifies, if the automatic creation of resources lines in assembly BOM is to be skipped.
  - **Skip Auto Routing Creation** - Specifies, if the automatic creation of routing lines is to be skipped.
  - **Show Item After Creation** - Specifies, if the new item card is to be displayed after creating the item.

4. The remaining settings for this configuration type can be changed in the next stage. For details, read the articles listed below.

TO	SEE
Learn how to define translations for configuration types	Configuration Type Translation Setup
Learn how to define configuration type attributes	Configuration Type Attributes
Learn how to define the automatic creation of the item number or item variant code	Auto Item No. or Item Variant Code Creation
Learn how to set the automatic creation of the item description	Auto Item Description or Item Variant Description Creation
Learn how to set the automatic creation of the production or assembly BOM lines	Auto BOM Line Creation
Learn how to set the automatic creation of the item sales prices	Auto Item Sales Price Creation
Learn how to set the automatic creation of the item purchase prices	Auto Item Purchase Price Creation
Learn how to set the automatic calculation of the item lead time formula	Calculating Lead Time Automatically
Learn how to set the automatic creation of routings	Auto Routing Creation
Learn how to define the technological limitations / configuration type errors	Technology Constraint Setup
Learn how to set automatic creation of item units of measure	Auto Item Unit of Measure Creation

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TO	SEE
Learn how to set resource lines for assembly BOMs	Define Configuration Type Resources
Learn how to set the automatic assignment of the item's country of origin	Auto Country of Origin Code Assignment
Learn how to set the automatic calculation of the item's net weight	Auto Net Weight Calculation
Learn how to set the automatic assignment of the item vendor's number	Auto Vendor Number Assignment
Learn how to set the automatic creation of the item's extended texts	Auto Item Extended Text Creation

See Also

Parent Configurations

Validate Configuration Type Setup

Release Configuration Type

Block Configuration Type

Setup Import and Export

Copy Configuration Type

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Configuration Type Translation Setup

Advanced Product Configurator has separate independent settings for each type of configuration to automatically generate item description translations and extended texts. The **Configuration Type** card translations:

- enable you to display the translations of the configuration type description depending on the application or user setup,
- specify the languages of item extended texts and item descriptions translations.

Setup

To change the setup of configuration type translations:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open its card.
3. Choose the **Translations** action on the **Navigate** tab.
4. Add new setup lines or modify the existing ones.
5. On the **Configuration Type Translations** card, the user can define translations of the **Description** field for a chosen configuration type.

- **Language Code** - Specifies the language code of the translation.
- **Description** - Specifies the description in the chosen language.

> ⚠ **CAUTION**
>
> To define the **Configuration Type** card translations in a specific language, the user must also define translations of all the remaining elements related to this configuration type such as attributes, attribute values and global attribute values.

See Also

Attribute Translation Setup

Attribute Value Translation Setup

Global Attribute Value Translation Setup

Item Description Setup

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Configuration Type Attributes

Advanced Product Configurator enables the user to assign an attribute set characterizing a given type to each configuration type. For example a bicycle can have attributes such as color, wheel size, gearing type and number etc. Attributes assigned to a configuration type can be selected from predefined configurator attributes.

TO	SEE
Learn how to assign configurator attributes to configuration types	Configuration Type Attribute Setup
Learn how to define configuration type attribute values	Configuration Type Attribute Value Setup
Learn how to define configuration type attribute value translations	Configuration Type Attribute Value Translations
Learn how to define dependencies between configuration type attributes	Attribute Value Conditions Setup
Learn how to define calculated attributes	Calculated Attributes
Learn how to define calculated attributes values	Calculated Attribute Setup

See Also

Configurator Attributes

Copy Configuration Type Attributes

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Configuration Type Attribute Setup

Each configuration type has individual settings for attributes that characterize a product created based on a particular configuration type.

Setup

To enter or modify configuration type attribute setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open its card.
3. On the **Configuration Type Card** page, choose the **Attributes** action on the **Navigate** tab.
4. Modify the setup. You can assign attributes selected from created configurator attributes to a particular configuration type on the **Configuration Type Attributes** page.

- **Attribute Code** field - Specifies a code of an attribute selected from configurator attributes.
- **Sequence** field - Specifies the attribute order in the configuration.
- **Required** field - Specifies whether it is required to enter attribute values in the configuration.
- **Calculated Value** field - Specifies, if an attribute value is calculated automatically based on a formula.
- **Multiple Values Possible** field - Specifies, if you can choose multiple values for an attribute in a configuration.
- **Value Rounding Precision** field - Specifies calculated attribute rounding precision.
- **Min. Value** field - Specifies the minimum possible value of an attribute in a configuration.
- **Max. Value** field - Specifies the maximum possible value of an attribute in a configuration.
- **Skip in Duplicate Search** field - Specifies whether an attribute should be skipped in duplicate search.

See Also

Configuration Type Attribute Value Setup

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Configuration Type Attribute Value Setup

You can define selectable values for each attribute assigned to a configuration type. For example, values assigned to the **Color** attribute are: red, green, black etc.

Selectable attribute values can be defined globally (they are common for all configurations).For details on how to define global attribute value translations, read Global Attribute Value Translation Setup. |

Selectable attribute values can also be defined as specific for a configuration type.

Setup

To change configuration type attribute value setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open its card.
3. On the **Configuration Type** card, on the **Navigate** tab, choose the **Attributes** action.
4. On the **Configuration Type Attributes** page, select an attribute and choose the **Attribute Values** action on the **Navigate** tab.
5. Modify the setup.

- **Value Code** - Specifies a unique attribute value code.
- **Value Description** - Specifies an attribute value description.
- **Sequence** - Specifies the order of values on a configuration picklist.
- **Multiple Value Ranking** - Specifies a multiple value ranking. The bigger the value, the more important it is.
- **Default** - Specifies the default attribute value.
- **Attribute Value Type Code** - Specifies the attribute value type code.
- **Lead Time in Days** - Specifies the additional lead time defined for a specific attribute value.
- **Resource Qty.** - Specifies the quantity of resources defined for the attribute value.
- **No. of Sales Surcharges** - Specifies a number of sales surcharges defined for an attribute value.
- **No. of Purchase Surcharges** - Specifies a number of purchase surcharges defined for an attribute value.
- **No. of Translations** - Specifies a number of translations defined for an attribute value.
- **Blocked** - Specifies, if the attribute value is blocked.

See Also

Configuration Type Attributes

Configuration Type Attribute Value Setup

Configuration Type Attribute Value Translations

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Configuration Type Attribute Value Translations

Advanced Product Configurator enables entering attribute values and their translations regardless of configuration types. Application settings allow the user to automatically generate item description translations and extended texts. Attribute value translations:

- enable you to display the translations of configuration type descriptions depending on the application or user setup,
- can be used to automatically to generate translations, item descriptions and extended texts at the same time.

Setup

To enter or modify the translation setup for configuration type attribute values:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open its card.
3. On the **Configuration Type** card, choose the **Attributes** action from the **Navigate** tab and the **Configuration Attributes** card will be opened.
4. On the **Configuration Type Attributes** card, choose the **Attribute Values** action from the **Navigate** tab and the **Configuration Type Attribute Values** card will be opened.
5. On the **Configuration Type Attribute Values** card, select an attribute value from the list and choose the **Translations** action from the **Navigate** tab.
6. On the **Configuration Type Attribute Value Translations** page fill in the following fields:

- **Language Code** - Specifies the language code of the translation.
- **Value Description** - Specifies an attribute value description in a chosen language.

See Also

Configuration Type Translation Setup

Attribute Translation Setup

Global Attribute Value Translation Setup

Item Description Setup

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Attribute Value Conditions Setup

Advanced Product Configurator is a solution that enables setting up dependencies between configuration types attribute values. The functionality can link the selected attribute value to other attribute values.

Setup

To define or change dependency setup of configuration type attributes:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. On the **Configuration Type Card** page, choose the **Attributes** action on the **Navigate** tab.
4. On the **Configuration Type Attributes** page, select an attribute and choose the **Attribute Values** action on the **Navigate** tab.
5. On the **Configuration Type Attribute Values** page, select a value dependent on other attribute values and choose the **Conditions** action on the **Navigate** tab.
6. Define occurrence conditions for the selected value.For details read Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type Attributes

Conditions Setup

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Calculated Attributes

Advanced Product Configurator offers the ability to automatically calculate numerical attribute values. This functionality enables the user to calculate attribute values based on a mathematical formula.

Multiple mathematical formulas can be used for each calculated attribute. The selection of a proper formula is determined by the conditions defined for each formula. The calculated attribute value is calculated automatically within a configuration and the user cannot choose or enter a value different from the calculated value. The user can apply calculated attribute values to formulas for calculations of other values and use them in the same way as other attribute values.

TO	SEE
Learn how to define the calculated attributes	Calculated Attributes Setup

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Calculated Attributes Setup

To define or change calculated attributes setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. On the **Configuration Type Card** page, choose the **Attributes** action on the **Navigate** tab.
4. On the **Configuration Type Attributes** page, choose the **Calculated Value** field for the selected numerical attribute.
5. Fill in the value in the **Rounding Precision** field - the system will automatically round the calculated value to the value specified in this field (0 - no rounding).
6. On the **Attribute Value Formulas** tab, choose the **Navigate** action.
7. On the **Configuration Type Attribute Value Formulas** page, specify a mathematical formula that defines an attribute value.

Users can define multiple mathematical formulas for each calculated attribute. The selection of a proper formula is determined by predefined conditions. To define conditions for a chosen formula, on the **Configuration Type Attribute Value Formulas** page, choose the **Conditions** action from the **Navigate** tab.

TIP

For details on how to fill in the Formula field, read Formulas Setup. For details on how to set up conditions, read Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type Attributes

Formulas Setup

Conditions Setup

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Formulas Setup

Advanced Product Configurator offers multiple ways to define mathematical formulas. Formulas are used to calculate numeric values. The Formula field can contain a fixed numeric value or a mathematical expression that can consist of:

- math operation symbols and brackets: |Symbol |Meaning | |----------|------------------| |(|opening bracket| |) |closing bracket | |+ |adding | |- |substracting | |* |multiplication | |/ |division | |^ |exponentiation |
- the **ABS()** function that describes the absolute value
- variable numeric attribute values chosen by or entered in the configuration by the user. The values are defined by the VAL (attribute code) symbol.

> **TIP**
>
> You can use the AssistButton in the **Formula** field to easily choose an attribute code.

Examples and a result of the operation have been described below.

FORMULA	HEIGHT ATTRIBUTE VALUE	WIDTH ATTRIBUTE VALUE	RESULT OF MAT. OPERATION
10			10
10*(12-14)			-20
ABS(10*(12-VAL(Width)))+2		14	22
VAL(Height)/VAL(Width)	15	5	3
VAL(Height)^2	10		100

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Conditions Setup

Advanced Product Configurator offers multiple ways to define conditions linked with configuration type records. Conditions consist of a set of setup used by the system to calculate the **True** and **False** values. Depending on where used, the returned logical value Specifies, if a related record will be used in the next steps, for example:

- if a production BOM component is to be used;
- if the formula is to be used to calculate component quantity;
- if the attribute value can be selected;
- if you should use dynamic routing line;
- etc.

Understanding the conditions functionality is key to efficiently use Advanced Product Configurator.

Condition lines

Users can define many logical condition lines on the **Configuration Type Conditions** page. A single condition line is similar to an equation in which the right and left sides of the equation must have the same value. The sides are divided by one of the signs: <=, <, =, >, >=. If the **Left Attribute Value Code** field is empty, the system will pick a value specified by the user in a configuration. If the **Right Attribute Value Code** field is empty, the system will pick a value specified by the user in a configuration. The **Left Formula** and **Right Formula** fields can contain a mathematical formula and its result will be used to compare left and right sides of the equation. Numeric attribute values, preceded by a VAL() - VAL (Attribute Code) symbol can be a part of the formula. You can use the **Assist Edit** button to choose an attribute as a part of the formula. For details read, Formulas Setup.

In the most basic scenario, the system defines a logical value of each line to define a condition set value. If all line conditions are **True**, the returned logical value is **True**. If any of the line conditions are **False**, the returned logical value is **False**.

To specify if a single line condition is **True** or **False**:

- the system retrieves attribute values specified by the user in a configuration;
- if the **Left Formula** and **Left Attribute Value Code** fields are empty, the **Left Attribute Value Code** field must be filled in;
- similarly, if the **Right Formula** and **Right Attribute Value Code** fields are empty, the **Right Attribute Value Code** field must be filled in;
- the system calculates formula values;
- the system calculates the **True** or **False** result by checking the agreement between the left and right sides of the equation, taking into consideration the **Logical Sign** field.

Example

CONDITION GROUP CODE	LOGICAL SIGN BETWEEN GR. LINES	LEFT ATTRIBUTE CODE	LEFT ATTRIBUTE VALUE CODE	LEFT FORMULA	LOGICAL SIGN	RIGHT ATTRIBUTE CODE	RIGHT ATTRIBUTE VALUE CODE	RIGHT FORMULA
		COLOR			=	COLOR	RED	
		HEIGHT			<=			90
				VAL(THICKNESS)/5	>			35

The **True** value will be returned for the condition set defined above, if three conditions are met:

1. The **Color** attribute value is **Red**

   And

2. The **Height** attribute value is lower than or equal to 90

   And

3. The **Thickness** attribute value divided by 5 is higher than 35.

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TIP

If no condition line is defined, the system will automatically return the **True** condition.

Condition Groups

Condition lines can be grouped by the code specified in the **Condition Group Code** field. Logical values OR or AND, defined in the **Logical Sign Between Gr. Lines** field, are applied between the lines in the group.

Example

CONDITION GROUP CODE	LOGICAL SIGN BETWEEN GR. LINES	LEFT ATTRIBUTE CODE	LEFT ATTRIBUTE VALUE CODE	LEFT FORMULA	LOGICAL SIGN	RIGHT ATTRIBUTE CODE	RIGHT ATTRIBUTE VALUE CODE	RIGHT FORMULA
GROUP1	OR	COLOR			=	COLOR	RED	
GROUP1	OR	COLOR			=	COLOR	GREEN	
		HEIGHT			<=			90
				VAL(THICKNESS)/5	>			35

The **True** value will be returned for the condition set defined above, if three conditions are met:

1. The **Color** attribute value equals **Red** or **Green** attribute values.

   And

2. The **Height** attribute value is lower than or equal to 90

   And

3. The **Thickness** attribute value divided by 5 is higher than 35.

Advanced Condition Formula

For more advanced scenarios, the user can use an additional logical formula, specified in the **Advanced Condition Formula** field.

TIP

Advanced condition formulas can include symbols such as **GR** (group code), logical symbols **AND**, **OR** as well as brackets. You can use the **Assist Edit** button to choose a condition group code.

If the **Advanced Condition Formula** field is not empty, the system will apply the formula and conditions from groups to specify the final logical value. First, the system will calculate the logical values of specific condition groups and apply the results of this calculation to the Advanced Condition Formula.

Example

Advanced Condition Formula: **(GR(GROUP1) AND GR(GROUP2)) OR GR(GROUP3)**

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CONDITION GROUP CODE	LOGICAL SIGN BETWEEN GR. LINES	LEFT ATTRIBUTE CODE	LEFT ATTRIBUTE VALUE CODE	LEFT FORMULA	LOGICAL SIGN	RIGHT ATTRIBUTE CODE	RIGHT ATTRIBUTE VALUE CODE	RIGHT FORMULA
GROUP1	OR	COLOR			=	COLOR	RED	
GROUP1	OR	COLOR			=	COLOR	GREEN	
GROUP2	AND	HEIGHT			<=			90
GROUP2	AND			VAL(THICKNESS)/5	>			35
GROUP3	AND	WYK_SPECJALNE			=	WYK_SPECJALNE	YES	

The **True** value will be returned for the condition set defined above, if one of the following conditions will be met:

1. The **Color** attribute value equals **Red** or **Green**

   And

The **Height** attribute value is lower than or equal to 90

The **Height** attribute value is lower than or equal to 90;

2. The WYK_SPECJALNE attribute value is YES.

See Also

Formulas Setup

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Item Number or Item Variant Code Setup

To enter or modify setup for item numbers or item variant codes generated by the configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in the edit mode.
3. Make sure that the **Skip Auto No.** checkbox is not selected.
4. On the card, choose the **Item Number Setup** action on the **Navigate** tab.
5. Add new setup lines or modify the existing ones.
6. On the **Configuration Type Item/Variant No. Setup** page, enter or modify the setup lines that create the string making up the item number. Fill in the following fields:

- **Position** - Specifies in which order the string will be added to the item number or the item variant code.
- **Type** - Specifies the type. The following options are available in the field:
    - **Counter** - Assigns successive numbers according to the configuration type setup.
    - **Number Series** - A standard numbering series defined in the system.
    - **Attribute Value Description** - The description of the attribute value selected in the configuration.
    - **Attribute Value Code** - The code of the attribute value selected in the configuration.
    - **Text** - Freely entered text.
    - **Attribute Code** - The code of the attribute.
    - **Code** - Depending on the selected type, speifies a related value, for example, a numbering series code or an attribute code.
    - **Text** field should be filled in if the **Text** value is selected as the **Type** in the line.
    - **Translation Not Required** - Specifies whether the value should be translated when the item number is generated.

TIP

Settings that specify the item number or item variant code are common. The application automatically applies the setup depending on the value of the **Configuration Output** field.

CAUTION

Note the maximum string length possible to generate (for the item number, it's 20 characters). If the maximum length is exceeded, the system returns an error when creating a new item or item variant.

Example

The table was completed as follows:

POSITION	TYPE	CODE	TEXT	NO TRANSLATION REQUIRED
0	Text		TKONF-	[x]
2	Counter			[x]

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This will give the following result for the first item created: **TKONF-001** (provided that the counter contains 3 characters)

See Also

Define Counter for Configuration Type

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Define Counter for Configuration Type

With the counter, you can generate a character string for a configuration type when creating a new item number or item variant code. It ensures the uniqueness of an item number or a variant code based on nonunique attribute values.

Setup

To define a configuration type counter:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. On the **Configuration Type Card** page, in the **Auto No.** section define the following field values:
    - **Last Used Counter** - Specifies the counter that was used last time.
    - **Counter - No. of Characters** - Specifies the number of characters of a generated counter.
    - **Alphanumerical Counter** - Specifies whether the counter can contain numbers and letters A..Z.

TIP

The use of alphanumerical characters significantly increases the number of combinations. For example, if the number of counter characters is two, the number of generated numbers will be 99 (01, 02, 03,.. ,99). The use of alphanumerical counter with the same number of characters, increases the number of combinations to 1296 (36^2) (01, 02, 03, .. 99, A1, A2, .., A9, AB, AC, ..ZZ). The alphanumerical counter with 4 characters gives 1679616 (36^4) combinations (0001..ZZZZ).

See Also

Configuration Type

Item Number or Item Variant Code Setup

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Auto Item Description or Item Variant Description Creation

With Advanced Product Configurator you can automatically generate values of the **Description** and **Description 2** fields of the item or values of the **Description** and **Description 2** fields of the item variant for newly created cards. Descriptions can be generated by using the attribute values of the created item or item variant. Each configuration type can contain individual description generation settings.

TO	SEE
Learn how to set up an item description	Item Description Setup

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Item Description Setup

The Advanced Product Configurator has separate independent settings for each type of configuration to automatically generate values for the **Description** or **Description 2** fields.

Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in the edit mode.
3. Make sure the **Skip Auto Item Descriptions** field is not selected.
4. On the card, choose the **Item Description Setup** or **Item Description 2 Setup** action on the **Navigate** tab.
5. Add new setup lines or modify the existing ones.
6. On the **Item Description Setup/Configuration Type Variant Setup** page, enter or modify the setup lines that create the string making up the item description. Fill in the following fields:

- **Position** - Specifies in what order the string will be added to the description.
- **Type** - Specifies the type of the position. The following options are available:
    - **Attribute Value Description** - Description of the attribute value of the configuration.
    - **Attribute Value Code** - The code of the attribute value selected in the configuration.
    - **Text** - A freely entered text.
    - **Attribute Code** - The attribute code of the configuration.

Code - Specifies the code of the attribute (in case **Attribute Value Description, Attribute Value Code** or **Attribute Code** field values are selected as the type).

- **Text** - Specifies any text that will be used when creating the description. The field should be filled in if the **Text** value is selected as the **Type** in the line.
- **Translation Not Required** - Specifies whether the value of the **Text** type should be translated when the description is created.

> ⚠ **CAUTION**
>
> Note the maximum string length possible to generate. (for the item/variant description it's 100 characters). If the maximum length is exceeded, the system returns an error when creating a new item or item variant.

Example

The table was completed as follows:

POSITION	TYPE	CODE	TEXT	TRANSLATION NOT REQUIRED
1	Text		Table-	[ ]
2	Attribute Value Code	WIDTH		[ ]

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POSITION	TYPE	CODE	TEXT	TRANSLATION NOT REQUIRED
3	Text		x	[x]
4	Attribute Value Code	LENGTH		[ ]
5	Text		-	[x]
6	Attribute Code	COLOR		[ ]
7	Text		-	[x]
8	Attribute Value Description	COLOR		[ ]

Assuming that the user selected the following attribute values during configuration: **Width** = 100 **Lenght** = 200 **Color** = Red The system will generate a description: Table-100x200-COLOR-red.

Translation Setup

The description can be generated automatically in multiple languages according to the configuration type translation setup. Attribute descriptions and attribute values have their own translation settings and will be automatically translated when creating an extended text. If the settings above include the **Text** type and the **No Translation Required** field is not selected, complete the text translation.

1. On the **Configuration Type Item/Variant No. Setup** page, choose the **Text Translations** action from the **Navigate** tab.
2. On the **Config. Type No. & Description Translation** page, complete the following fields:

- **Language Code** - Specifies the language code of the translation.
- **Text** - Specifies the translation of the text in the selected language.

See Also

Configuration Type Translation Setup

Attribute Translation Setup

Global Attribute Value Translation Setup

Configuration Type Attribute Value Translations

Configuration Type

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Auto BOM Line Creation

Advanced Product Configurator enables the user to automatically create assembly or production BOM lines. This functionality allows for defining a BOM template and components for each configuration type separately. Choosing a configuration type BOM component as a production or assembly BOM component can be determined by conditions. The quantity of a BOM component can be a fixed value or can be defined on the basis of a formula determined by attribute values.

TO	SEE
Learn how to set configuration type BOM template	Configuration Type BOM Template Setup
Learn how to set configuration type BOM template components	Configuration Type BOM Template Component Setup
Learn how to define quantity formulas for a configuration type BOM component	Configuration Type BOM Line Quantity Formulas Setup

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Configuration Type BOM Template Setup

Setup related to the automatic creation of production or assembly BOM lines is different for each configuration type.

- BOM template consists of component groups.
- Each group can have multiple BOM components.

Setup

To enter or modify a BOM template setup for a configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. On the **Configuration Type Card** page, choose the **BOM Template** action on the **Navigate** tab.
4. On the **Configuration Type Component Groups** page, create new or modify the existing lines.

- **Component Group Code** - Specifies the component group code. This code is used for grouping BOM components.
- **Mandatory** - Specifies whether at least one component in the group is mandatory in the BOM.
- **Routing Link Code** - Specifies a routing link code in the production BOM for all components in the group.
- **Single Component Allowed** - If selected, only one item from a given component group will be allowed in the automatically generated production BOM.
- **Auto Fill BOM Items Conditions** - Specifies that conditions for a new item for this BOM component group will be filled in automatically (if possible) based on component item attributes.

5. Define new components or modify the existing ones for each of the above groups in the next step. For details, read Configuration Type BOM Template Component Setup.

See Also

Auto BOM Line Creation

Configuration Type BOM Template Component Setup

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Configuration Type BOM Template Component Setup

Setup related to the automatic creation of production or assembly BOM lines is different for each configuration type.

- BOM template consists of component groups.
- Each group can have multiple BOM components.

Setup

To define or modify settings for configuration type BOM component lines:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a **configuration type** from the list and open the card.
3. On the **Configuration Type Card** page, choose the **BOM Template** action on the **Navigate** tab.
4. On the **Configuration Type Component Groups** card, choose a group and on the **Navigate** tab choose the **BOM Lines** action.
5. On the **Configuration Type BOM Lines** page, create new lines or modify the existing ones.

- **Type** - Specifies a BOM component type.
- **No.** - Specifies a BOM component number.
- **Unit of Measure Code** - Specifies a BOM component unit of measure code.
- **Description** - Specifies a BOM component description.
- **Description 2** - Specifies a BOM component description 2.

1. In the next step, define new or modify the existing line conditions. To define line conditions, choose the **Conditions** action on the **Navigate** tab. For details, read Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

7. Set quantity formulas for each line. For details, read Configuration Type BOM Line Quantity Formulas Setup.

See Also

Auto BOM Line Creation

Configuration Type BOM Line Quantity Formulas Setup

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Configuration Type BOM Line Quantity Formulas Setup

All configuration type BOM template components can have separate settings for calculating a required quantity of BOM components. A specific mathematical formula is used to calculate the quantity. Each line can include many mathematical formulas for calculating this quantity. The selection of a proper formula is determined by predefined conditions.

Setup

To define or modify quantity formula settings for configuration type BOM component lines:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. On the **Configuration Type** card, on the **Navigate** tab, choose the **BOM Template** action.
4. On the **Configuration Type Component Groups** page, choose a group and on the **Navigate** tab choose the **BOM Lines** action.
5. On the **Configuration Type BOM Lines** page select a line and on the **Navigate** tab choose the **Item Quantity Formulas** action.
6. On the **Configuration Type BOM Line Qty. Formulas** page, create a new line or lines defining the formula that will be used to calculate the quantity. Fill in the following fields:

- **Formula** - Specifies a mathematical formula that will be used to calculate the component's quantity.For details, read Formulas Setup.

7. If you enter more than one formula, define or modify conditions for each of them in the next step. To define conditions for a chosen line, choose the **Conditions** action on the **Navigate** tab. For details, read Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Auto BOM Line Creation

Conditions Setup

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Auto Item Sales Price Creation

With Advanced Product Configurator, you can automatically calculate and create sales prices for items created by means of configuration. Sales prices are set on the **Configuration Type** card.

- Any number of sales price formulas can be defined for each type of configuration.
- For each formula, you can add surcharges to the sales price assigned to the configuration type attribute values.
- For each formula, you can add sales prices of components included in the assembly BOM or production BOM.
- The application of a given formula may be subject to conditions.

TO	SEE
Learn how to set up sales price formulas	Sales Price Formula Setup
Learn how to set up sales price surcharges	Sales Price Surcharges Setup

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Sales Price Formula Setup

Any number of formulas for calculating sales prices can be defined for each configuration type. The application of a given formula is determined by the conditions.

Setup

To enter or modify the setup of a sales price formula:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. Choose the **Sales Price Formulas** action on the **Navigate** tab.
4. On the **Configuration Type Sales Price Formulas** page, create new lines defining the sales price. Fill in the following fields:

- **Price List Code** - Specifies the price list code into which the calculated sales prices will be inserted.
- **Formula** - Specifies a mathematical formula that will be used to calculate the sales price. For details, read Formulas Setup.
- **Sales Type** - Specifies the sales price type, which defines whether the price is for an individual, group, all customers, or a campaign.
- **Sales Code** - Depending on the value of the **Sales Type** field, it specifies the customer number, customer price group or campaign number.
- **Currency Code** - Specifies the currency code of the calculated sales price.
- **Price Includes VAT** - Specifies whether the calculated price includes VAT.
- **Allow Line Disc.** - Specifies whether sales line discounts can be applied to the calculated price.
- **Allow Invoice Disc.** - Specifies whether an invoice discount can be applied to the calculated price.
- **Add Components Price** - Specifies whether the calculated sales price should contain calculated BOM component prices.
- **Add Attributes Surcharges** - Specifies whether a calculated sales price should contains surcharges related to configuration type attribute values. For details, Sales Price Surcharges Setup.
- **Price Factor** - Specifies the price factor. With the price factor, you can avoid defining different formulas for different sales types. The calculated price will be multiplied by the price factor.
- **Comp. Prices from Customer No.** - Specifies the component prices of the customer number. If the **Add Component Prices** field is switched on, component prices will be calculated based on defined prices for selected customer in this field.

5. Define or modify the conditions for lines. To define conditions for a chosen line, choose the **Conditions** action on the **Navigate** tab.
6. Set condition lines for lines. For details, read Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.

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4. Choose the **OK** button.

See Also

Configuration Type

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Sales Price Surcharges Setup

With sales price surcharges you can add to the sales price calculated by the formula an additional amount resulting from the selection of a specific attribute value subject to a surcharge (e.g. surcharge for a special color, special design, additional elements...).

Setup

To enter or modify setup of sales prices surcharges:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. Choose the **Sales Price Formulas** action on the **Navigate** tab.
4. Make sure that on the **Configuration Type Sales Price Formulas** page, the **Add Attributes Surcharges** field is selected for the purchase price formula, for which you want to add a surcharge.
5. Close the **Configuration Type Sales Price Formulas** page.
6. On the **Configuration Type** card, on the **Navigate** tab, choose the **Attributes** action.
7. On the **Configuration Type Attributes** page, select an attribute and choose the **Attribute Values** action on the **Navigate** tab.
8. On the **Configuration Type Attribute Values** page, select the required attribute value and choose the **Sales Surcharges** action on the **Navigate** tab.
9. On the **Configuration Type Attribute Value Sales Surcharges** page, create new lines that define sales surcharges that are assigned to the selected attribute value. Fill in the following fields:

- **Currency Code** - Specifies the surcharge currency code.
- **Surcharge Value** - Specifies the surcharge value that will be added to the purchase price formula.

See Also

Configuration Type

Sales Price Formula Setup

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Auto Item Purchase Price Creation

With Advanced Product Configurator you can automatically calculate and create purchase prices for items created by means of configuration. Purchase prices are set on the **Configuration Type** card.

- Any number of purchase price formulas can be defined for each type of configuration.
- For each formula, you can add surcharges to the purchase price assigned to the configuration type attribute values.
- The application of a given formula may be subject to conditions.

TO	SEE
Learn how to set up purchase price formulas	Purchase Price Formula Setup
Learn how to set up purchase price surcharges	Purchase Price Surcharges Setup

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Purchase Price Formula Setup

Any number of formulas for calculating purchase prices can be defined for each configuration type. The application of a given formula is determined by the conditions.

Setup

To enter or modify the setup of a purchase price formula:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. Choose the **Purchase Price Formulas** action on the **Navigate** tab.
4. On the **Configuration Type Purchase Price Formulas** page create new lines defining the purchase price. Fill in the following fields:
    - **Price List Code** - Specifies the price list code into which the calculated purchase prices will be inserted.
    - **Formula** - Specifies a mathematical formula that will be used to calculate the purchase price. For details, read Formulas Setup.
    - **Add Attributes Surcharges** - Specifies whether surcharges set in the configuration type attribute values are to be added to the calculated value from the formula. For details, read Purchase Price Surcharges Setup.
    - **Vendor No.** - Specifies the number of the vendor for whom the calculated price is to be applied.
    - **Currency Code** - Specifies the currency code of the calculated purchase price.
5. Define or modify the conditions for lines. To define conditions for a chosen line, choose the **Conditions** action on the **Navigate** tab.
6. Set condition lines for lines.For details, read Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type

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Purchase Price Surcharges Setup

With purchase price surcharges you can add to the purchase price calculated by the formula an additional amount resulting from the selection of a specific attribute value subject to a surcharge (e.g. surcharge for a special color, special design, additional elements...).

Setup

To enter or modify the setup of purchase price surchages:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. Choose the **Purchase Price Formulas** action on the **Navigate** tab.
4. Make sure that on the **Configuration Type Purchase Price Formulas** page, the **Add Attributes Surcharges** field is selected for the purchase price formula, for which you want to add a surcharge.
5. Close the **Configuration Type Purchase Price Formulas** page.
6. On the **Configuration Type** card, on the **Navigate** tab, choose the **Attributes** action.
7. On the **Configuration Type Attributes** page, select an attribute and choose the **Attribute Values** action on the **Navigate** tab.
8. On the **Configuration Type Attribute Values** page, select the required attribute value and choose the **Purchase Surcharges** action on the **Navigate** tab.
9. On the **Configuration Type Attribute Value Purchase Surcharges** page, create new lines that define purchase surcharges that are assigned to the selected attribute value. Fill in the following fields:
    - **Vendor No.** - Specifies the number of the vendor for whom the surcharge should apply.
    - **Currency Code** - Specifies the surcharge currency code.
    - **Surcharge Value** - Specifies the surcharge value that will be added to the purchase price formula.

See Also

Configuration Type

Purchase Price Formula Setup

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Auto Lead Time Formula Calculation

The Advanced Product Configurator allows you to automatically calculate the lead time formula for newly created item cards. The lead time is calculated using lead time formulas. You can add the lead time of components and additional lead time related to attribute values to the value calculated with the formula. Each configuration type can contain individual lead time formula settings.

TO	SEE
Learn how to set up lead time formulas	Lead Time Formulas
[Learn how to set up extended lead time	Extended Lead Time

See Also

Configuration Type

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Lead Time Formulas

Each configuration type can contain individual lead time formula setup. Formulas can be assigned to a specific warehouse location. The application of a given formula is determined by the conditions.

Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. Choose the **Lead Time Formulas** action on the **Navigate** tab.
4. Create new lines on the**Configuration Type Lead Time Formulas** page. Fill in the following fields:

- **No. Of Days Formula** - Specifies a fixed value or mathematical formula and its result will be used to calculate the number of days. For details read, Formulas Setup.
- **Location Code**- Specifies the location code for which the lead time value will be calculated.
- **Add Components Lead Time Formula**- Specifies whether to add the lead time resulting from the lead time of each component of the BOM to the value calculated using the formula.
- **Add Attribute Lead Time Formula**- Specifies whether to add the extended lead time set in the configuration type attribute values to the value calculated using the formula.

5. Define or modify the conditions for lines. To define conditions for a chosen line, choose the **Conditions** action on the **Navigate** tab.
6. Set condition lines for selected formulas. For details read, Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type

Auto Lead Time Formula Calculation

Conditions Setup

Formulas Setup

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Extended Lead Time

Extended lead time enables the user to add additional lead time that results from choosing a specific attribute value (for example extended lead time due to the choice of a specific color or additional elements, specific order realization etc.) to lead time calculated by the lead time formula.

Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose the **configuration type** from the list and open the card.
3. Choose the **Lead Time Formulas** action on the **Navigate** tab.
4. On the **Configuration Type Lead Time Formulas** page, make sure that the **Add Attributes Lead Time Formula** field is selected for the formula, for which you want to add the extended lead time.
5. Close the **Configuration Type Lead Time Formulas** page.
6. On the **Configuration Type Card** page, choose the **Attributes** action on the **Navigate** tab.
7. On the **Configuration Type Attributes** page, select an attribute and choose the **Values** action from the **Navigate** tab.
8. On the **Configuration Type Attribute Value** page, enter a value in the **Lead Time in Days** field that specifies the extended lead time for a chosen attribute value.

See Also

Configuration Type

Automatic Lead Time Calculation

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Auto Routing Creation

A routing in the Advanced Product Configurator can be handled in two different ways:

1. Static - an existing routing is used by assigning an existing number to a newly created item or production order.
2. Dynamic - a new routing is created automatically and assigned to the newly created item, item variant or production order.

TO	SEE
Learn how to set up a static routing	Static Routing Setup
Learn how to create a dynamic routing	Dynamic Routing Setup

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Static Routing Setup

A static routing for a newly created item or production order can be defined individually for each **Configuration Type** card.

> **⚠ CAUTION**
>
> You can only use routing-related setup if the **Configuration Output** field in the **Configuration Type** card is set to **Item Production BOM**, **Item Variant Production BOM** or **Production Order**.

Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in the edit mode.
3. In the **Routing No.** field select the routing number that will be automatically assigned to new items or production orders that are created by using the selected configuration type.

TO	SEE
Learn how to create dynamic routings	Dynamic Routing Setup

More information

Create Routings in Business Central

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Dynamic Routing Setup

With Advanced Product Configurator you can automatically create a new routing based on user-selected attribute values. Dynamic routing lines can be defined individually for each **Configuration Type** card. Whether a given line will be selected as a line of a newly created routing is determined by the conditions set separately for each line.

> **⚠ CAUTION**
>
> You can only use routing-related settings if the **Configuration Output** field in the **Configuration Type** card is set to **Item Production BOM**, **Item Variant Production BOM** or **Production Order**.

Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. On the card, choose the **Routing Setup** action on the **Navigate** tab.
4. On the **Routing Lines** page, create new routing lines for the configuration type or modify the existing ones. If needed, use a short description after hovering over the field.
5. Define or modify the conditions for lines. To define line conditions, choose the **Conditions** action on the **Navigate** tab.
6. Set condition lines for lines. For details read, Conditions Setup.

> **TIP**
>
> Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:
>
> 1. Choose a line to which you want to copy conditions.
> 2. Choose the **Copy Conditions** action from the **Process** tab.
> 3. Choose a line from which you want to copy conditions.
> 4. Choose the **OK** button.

> **NOTE**
>
> Advanced Product Configurator automatically prevents the creation of duplicate routings. When creating a routing (based on the above settings) for a new item, item variant or production order, the system will automatically check if a routing with the same lines already exists. If so, the system will not create a new routing and will use the existing one.

See Also

Configuration Type

Conditions Setup

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Technology Constraint Setup

Advanced Product Configurator enables defining technology constraints, resulting from the combination of specific item attribute values, which prevent its production. For example, it allows for restricting the height or width of an item because of the type of surface finish (such as color). To set up technological constrains, it is necessary to define the errors specific of a configuration type and conditions of its occurrence. It is possible to define multiple errors for each configuration type. An error can be:

- a warning - when the error occurs, the user will receive a warning but the configuration can be run;
- an error - when the error occurs, the user can't run configuration until attribute values are changed into values that don't trigger the error.

TO	SEE
Learn how to set configuration type errors	Configuration Type Error Setup

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Configuration Type Error Setup

All configuration types have different configuration error setup. The occurrence of an error is determined by the conditions.

Setup

To change the setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. Choose the **Errors** action on the **Navigate** tab.
4. Add new or modify the existing lines. Fill in the following fields:

- **Error Type** - Specifies the error message type. Error message types:
  - **Error** - When an error occurs, the user can't run configuration until attribute values are changed into values that don't trigger the error.
  - **Warning** - When an error occurs, the user will receive a warning but will still be able to run the configuration.
- **Error Description** - Specifies the description of the error.

5. In the next step, define new or modify the existing line conditions. To define line conditions, choose the **Error Conditions** action on the **Navigate** tab. For details read, Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Copy Configuration Type Errors

Configuration Type

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Auto Item Unit of Measure Creation

Advanced Product Configurator allows you to automatically create item units of measure for newly created item cards. Base units of measure can be determined by the attributes defined in the configuration. It is possible to automatically define additional item units of measure in relation to the base unit of measure.

All configuration types have separate settings for the automatic generation of item units of measure.

TO	SEE
Learn how to define a configuration type base unit of measure	Base Unit of Measure Setup
Learn how to define configuration type additional units of measure	Additional Units of Measure Setup

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Base Unit of Measure Setup

To define or modify automatic item unit of measure creation in a specific configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. Make sure that the **Skip Auto Base UOM** checkbox is not selected.
4. Choose the **Base UOM** action on the **Navigate** tab.
5. On the **Config. Type Base UOM** page, create new or modify the existing setup lines. You can set multiple base units of measure for each configuration type. Assignment of a base unit of measure to a newly created item is determined by the conditions.

- The **Unit of Measure Code** field specifies the base unit of measure code.

6. In the next step define new or modify the existing line conditions. To define line conditions, choose the **Conditions** action on the **Navigate** tab. For details read, Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Additional Unit of Measure Setup

Conditions Setup

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Additional Unit of Measure Setup

Advanced Product Configurator enables the automatic creation of additional item units of measure. The settings for automatic creation of additional units of measure can be defined on the **Configuration Type** card in relation to the base unit of measure settings.

Setup

To define the configuration type additional units of measure settings:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. Make sure that the **Skip Auto Base UOM** checkbox is not selected.
4. On the **Configuration Type** page, on the **Navigate** tab, choose the **Base UOM** action.
5. On the **Config. Type Base UOM** page, select the base unit of measure for which you want to define additional units of measure and choose the **Additional UOM** action on the **Navigate** tab.
6. On the **Config. Type Additional UOM** page, create new or modify the existing setup lines. Fill in the following fields:
    - **Unit of Measure Code** - Specifies an additional unit of measure code.
    - **Qty. per Unit of Measure Formula** - Specifies the fixed value or a mathematical formula, its result will be used to calculate the quantity per unit of measure of an item additional unit of measure.

See Also

Auto Item Unit of Measure Creation

Configuration Type

Formulas Setup

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Define Configuration Type Resources

Advanced Product Configurator enables the automated addition of item lines to the assembly BOM. This functionality is based on the resource list related to the configuration type. The choice of resources that will be placed in the BOM is determined by the conditions.

TO	SEE
Learn how to define resources	Resources Setup

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Resources Setup

To set up the automatic addition of resource lines to the assembly BOM for a given configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. Choose the **Resources** action on the **Navigate** tab.
4. On the **Configuration Type Resources** page, create new resource lines. Fill in the required values:

- **Qty Formula** - Specifies the mathematical formula that will be used to calculate the quantity of a selected resource in the assembly BOM.
- **Resource No.** - Specifies the number of the resource.

TO	SEE
Learn how to fill in the Formula field	Formulas Setup

5. Define or modify the conditions for lines. To define conditions for a chosen line, choose the **Conditions** action on the **Navigate** tab.
6. Set condition lines for lines.

TO	SEE
Learn how to set up conditions	Conditions Setup

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type

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Auto Country of Origin Code Assignment

Advanced Product Configurator enables the user to automatically assign the country of origin code to new items with the use of configuration. The choice of the country of origin can depend on attribute values.

TO	SEE
Learn how to set a country of origin code	Country Of Origin Setup

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Country of Origin Setup

All configuration types have separate setup related to the automatic assignment of a country of origin code to new items.

Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. On the **Configuration Type** card, on the **Navigate** tab, choose the **Country of Origin** action.
4. On the **Configuration Type Country of Origin Code** page, create new lines. You can set multiple country codes for each configuration type. Assignment of a country code to a new item is determined by the conditions.
    - **Country of Origin Code** - Specifies a country of origin code that can be assigned to a new item with the use of a selected configuration type.
5. In the next step, define new conditions or modify the existing ones for the lines above. To define conditions for a chosen line, choose the **Conditions** action on the **Navigate** tab. For details, read Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type

Conditions Setup

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Auto Net Weight Calculation

Advanced Product Configurator enables automatic calculation and completion of the **Net Weight** field for newly created item cards. Weight is calculated using net weight formulas set independently for each configuration type.

- Any number of net weight formulas can be defined for each type of configuration.
- The application of a given formula may be subject to conditions.

TO	SEE
Learn how to set up net weight formulas	Net Weight Formula Setup

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Net Weight Formula Setup

Any number of formulas for calculating net weight can be defined for each configuration type. Net weights of components included in the production or assembly BOM can be added to the value calculated using the formula. The application of a given formula is determined by the conditions.

Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card.
3. On the **Configuration Type** card, on the **Navigate** tab, choose the **Net Weight Formulas** action.
4. On the **Configuration Type Net Weight Formulas** page create new lines to define the net weight. Fill in the following fields:

- **Formula** - Specifies the mathematical formula that will be used to calculate the net weight.

TO	SEE
Learn how to fill in the Formula field	Formulas Setup

- **Add Components Net Weight** - Specifies whether the net weight of the selected configuration should include the net weight of BOM components.

5. Define or modify the conditions for lines. To define conditions for a chosen line, choose the **Conditions** action on the **Navigate** tab.
6. Set condition lines for selected formulas.

TO	SEE
Learn how to set up conditions	Conditions Setup

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type

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Auto Vendor Number Assignment

Advanced Product Configurator enables the user to automatically assign a vendor number to new items with the use of configuration. The choice of a vendor number is determined by attribute values.

TO	SEE
Learn how to set the vendor no.	Vendor Setup

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Vendor Setup

All configuration types have separate settings related to the automatic assignment of a vendor number to new items.

Setup

To change the setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open its card.
3. On the **Configuration Type** card, on the **Navigate** tab, choose the **Vendor** action.
4. On the **Configuration Type Vendors** page, create new lines. You can set multiple vendor numbers for each configuration type. Assignment of a vendor number to a new item is determined by the conditions.
    - The **Vendor No.** field - Specifies a vendor number that can be assigned to a new item with the use of a chosen configuration type.
5. In the next step, define new or modify the existing line conditions. To define line conditions, choose the **Conditions** action on the **Navigate** tab. For details read, Conditions Setup.

TIP

Advanced Product Configurator offers an easy way to copy conditions from lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
2. Choose the **Copy Conditions** action from the **Process** tab.
3. Choose a line from which you want to copy conditions.
4. Choose the **OK** button.

See Also

Configuration Type

Conditions Setup

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Auto Item Extended Text Creation

Advanced Product Configurator enables the automatic creation of extended texts for new items. Extended texts can be generated by using the attribute values of the created items or item variants. Each configuration type can contain individual description generation settings.

TO	SEE
Learn how to define extended texts	Extended Text Setup

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Extended Text Setup

Advanced Product Configurator has separate independent settings for each type of configuration to automatically generate item extended texts.

Setup

To change the setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. Make sure the **Skip Auto Extended Text** checkbox is not selected.
4. On the **Configuration Type Card** page, choose the **Extended Text Setup** action on the **Navigate** tab.
5. Choose the **New** action to create a new extended text or mark an existing extended text and oped the card in edit mode.

   The **Config. Type Ext. Text Card** page has four sections.

   The **General** section - Contains fields linked by the following data:

   - **Configuration Type Code** - Specifies the configuration type code determined by the settings.
   - **Description** - Specifies the content of the extended text description.
   - **Text No.** - Specifies the extended text number.

   The **Config. Type Ext. Text Lines** section - Contains the extended text lines list. Each line has additional settings for automatic generation of the text line.

   - **Line No.** - Specifies the extended text line number.

   The **Sales** section - Contains settings that determine the visibility of a generated text on sales documents.

   The **Purchases** section - Contains settings that determine the visibility of a generated text on purchase documents.

   The **Service** section - Contains settings that determine the visibility of a generated text on service documents.

Setup Creation

- Enter the value in the **Description** field in the General section.
- Choose the documents for which the text will be visible by selecting specific field values in the **Sales**, **Purchases** and **Service** sections.
- Fill in or modify extended text lines in the **Config. Type Ext. Text Lines** section.
  - To add a new line, choose the **Insert New Line** action from the **Manage** tab.
  - To delete a line. choose the **Delete Line** action from the **Manage** tab.
  - After adding the new line you must modify its settings. On the **Manage** tab, choose the **Line Setup** action to edit setup for automatic generation of line text.

Extended Text Line Setup

On the **Configuration Type Extended Text Setup** page, enter new or modify the existing setup lines that will form a string representing a single extended text line.

- **Position** - Specifies in what order the string will be added to the extended text line.
- **Type** - Specifies the type of the position. The following options are available:

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    - **Attribute Code** - The description of the attribute code of the configuration.
    - **Attribute Value** - Attribute value selected in the configuration.
    - **Attribute Value Code** - Code of the attribute value selected in the configuration.
    - **Text** - Freely entered text.

- **Code** - Specifies the code of the attribute (in case Attribute Value Description, Attribute Value Code or Attribute Code is selected as the type).
- **Text** - Specifies any text that will be used when creating the extended text line. The field should be filled in if the **Text** value is selected as the **Type** in the line.
- **No Translation Required** - Specifies whether the value of the Text type should be translated when the extended text is created.

Example: The table was completed as follows:

POSITION	TYPE	CODE	TEXT	TRANSLATION NOT REQUIRED
1	Text		Table-	[ ]
2	Attribute Value Code	WIDTH		[ ]
3	Text		x	[x]
4	Attribute Value Code	LENGTH		[ ]
5	Text		-	[x]
6	Attribute Code	COLOR		[ ]
7	Text		-	[x]
8	Attribute Value Description	COLOR		[ ]

Assuming that the user selected the following attribute values during configuration: WIDTH = 100 LENGTH = 200 COLOR = Red The system will generate the following extended text value: Table-100x200-COLOR-red.

Text Translation Setup

Extended texts can be generated automatically in multiple languages according to the configuration type translation setup. Attribute descriptions and attribute values have their own translation settings and will be automatically translated when creating an extended text. If the line settings include the Text type and the **No Translation Required** field is not selected, complete the text translation.

- On the **Configuration Type Extended Text Setup** page, select the **Text Translations** action from the Navigate tab.
- On the **Config. Type Extended Text Translation** page, complete the following:
    - The **Language Code** field - Specifies the language code of the translation.
    - The **Text** field - Specifies the translation of the text in the selected language.

See Also

Configuration Type Translations

Define Attribute Translations

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Global Attributes Value Translations

Configuration Type Attribute Value Translations

Configuration Type

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Validate Configuration Type Setup

With Advanced Product Configurator you can validate the setup defined by the user. Information about the number of errors made and the error messages is displayed in the **Validation Errors** field.

To validate configuration type setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in the edit mode.
3. On the **Configuration Type Card** page, choose the **Validate** action on the **Process** tab.
4. The number of errors in the configuration type setup will be set in the **Validation Errors** field.

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Copy Configuration Type

New configuration types can be created on the basis of the existing configuration types. This functionality is useful for creating a configuration type similar to the existing configuration type. It is possible to modify specific settings of the new configuration type so that the user doesn't have to create them from scratch.

Copying Configuration Type

To copy the existing configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. On the **Configuration Types** page, choose a configuration type, from which you want to create a copy and open the card in edit mode.
3. On the **Configuration Type Card** page, on the Process tab choose the **Copy Configuration Type** action.
4. Enter values in the following fields:
    - **Target Configuration Type Code** that specifies configuration type code of the copy.
    - **Template Item No.** that specifies the item no. that will be used as a template of the configuration type copy.
5. Choose the **OK** button to create a copy.

See Also

Configuration Type

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Copy Configuration Type Attributes

Configuration type attribute setup can be copied from another configuration type. This functionality is useful for creating attribute settings similar to the settings of an existing configuration type. The user doesn't have to create the settings from scratch because the copied settings can be modified.

Copy Configuration Type Attributes

To copy attribute settings from the existing configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. Choose the **Copy Attributes** action from the **Process** tab.
4. Choose the configuration type from which you want to copy attribute settings.
5. Choose the **OK** button.

See Also

Configuration Type

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Copy Configuration Type Errors

Configuration type technological constrains (errors) setup can be copied from a similar configuration type. This functionality is useful for creating technological constrains similar to the technological constrains of a new configuration type. The user doesn't have to create the settings from scratch because the copied settings can be modified.

Copy Configuration Type Errors

To copy errors from the existing configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in edit mode.
3. Choose the **Copy Errors** action from the **Process** tab.
4. Choose the configuration type from which you want to copy error settings.
5. Choose the **OK** button.

See Also

Configuration Type

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Release Configuration Type

Release of the configuration type is the final stage of preparing the setup. During release, the configuration type card automatically undergoes a series of tests to ensure that the settings do not contain errors. After the tests are successfully completed, the status of the configuration type changes to Approved. From now on, users can start creating new products using the configuration. If the system detects errors that prevent the status from changing to Approved, the process will be interrupted, validation errors will be visible in the **Validation Errors** field on the **Configuration Type** card.

TIP

Advanced Product Configurator allows authorized users to create configurations related to the configuration type that has not yet been verified. Permissions can be set on the **Product Configuration User Setup** page in the **Allow Use Not Certified Configuration Type** field.

To release a configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in the edit mode.
3. On the **Configuration Type Card** page, choose the **Release** action on the **Process** tab.
4. If no errors are detected, the **Status** field will be set to **Certified**. If errors are detected, the value of the **Validation Errors** field will indicate the number of errors detected. Resolve any errors and run the **Release** action again. To view the messages of detected errors, select the **Validation Errors** field.

IMPORTANT

A configuration type with the **Approved** status cannot be modified. To make changes to the approved type, select the **Reopen** action on the **Process** tab, which will change the type status to **New**, thus enabling editing.

TO	SEE
Learn how to set up user settings	User Setup
Learn how to set up the configuration type	Configuration Type

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Block Configuration Type

Advanced Product Configurator offers the ability to block specific configuration types. Blocking a configuration type prevents its use.

Setup

To block a configuration type:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open its card.
3. On the **Configuration Type Card** page, choose the **Block** action on the **Home Page** tab.

The value of a configuration type in the **Status** field will be changed to **Blocked**. If you try to create a configuration for a blocked configuration type, the error message will be displayed.

See Also

Configuration Type

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Parent Configurations

Advanced Product Configurator allows you to create a production or assembly BOM that includes the components you are configuring. An example is a bicycle, which is subject to configuration. Its component may be a frame, which is also subject to configuration (it's a separate item). This functionality is handled through the structure of parent configurations. In the example as above, the bike item is the parent configuration type for the frame item. After running the configuration for the parent type, Advanced Product Configurator will automatically:

- Find and creates sub-configurations.
- Copy the values of the same attributes from the parent configuration.
- The user can complete the values of specific attributes that were missing from the parent configuration.
- After running the parent configuration, the created item can be automatically added to the parent BOM.

TO	SEE
Learn how to set up a parent configuration type	Parent Configuration Type Setup

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Parent Configuration Type Setup

To enter or modify setup:

1. Choose the icon, enter **Configuration Types**, and then select a related link.
2. Choose a configuration type from the list and open the card in the edit mode.
3. The **Parent Configuration** section of the **Configuration Type** card contains fields related to the parent configuration setup. Fill in the following fields:

- **Parent Configuration Type Code** - Specifies the parent configuration type code. For example, a bicycle can be the type of a parent configuration for a frame.
- **Add to Parent BOM** - Specifies whether an item defined based on this configuration type is to be added to the BOM of the selected parent configuration.
- **Quantity per Parent BOM** - Specifies the quantity of an item in the parent BOM.
- **Routing Link Code in Parent BOM** - Specifies the routing link code in the parent BOM.

TIP

The parent configuration type should share attributes and attribute values with the child configuration type.

After running the configuration for the parent type, Advanced Product Configurator will automatically:

- find and create child configurations;
- copy the values of the same attributes from the parent configuration.
- the user can complete the values of specific attributes that were missing from the parent configuration.

After running the parent configuration, the created item can be automatically added to the parent BOM, according to the settings above.

See Also

Configuration Type

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Import/Export Setup Wizard

Advanced Product Configurator enables you to easyily export and import configuration type settings. The system exports data to an xml file which can be imported to other database or company.

Export

To export specific configuration type settings to am XML file:

1. Choose the icon, enter **Import/Export Configuration Type Wizard**, and then select a related link.
2. On the **Import/Export Configuration Type Wizard** page, in the **User Action** field, choose **Export** and then **Next**.
3. Choose a configuration type that you want to import from the list by selecting the **Include in Export/Import** checkbox. All common data will be automatically included in the file.
4. Choose the **Next** button.
5. The system will close the page and begin downloading the XML setup file.

Import

To import configuration type settings from the exported XML setup file:

1. Choose the icon, enter **Import/Export Configuration Type Wizard**, and then select a related link.
2. In the **User Action** field, choose the **Import** and **Next** buttons.
3. Choose the XML file from which you want to load data. The functionality will work properly under the condition that the chosen file was created in the wizard.
4. Choose configuration types which you want to import from the list by selecting the **Include in Export/Import** checkbox (the system will only create selected configuration types).
5. If needed, choose common data such as attributes, values and types for the import, by selecting the **Include in Import/Export** checkbox (the system will save all common data). If you don't complete this step, the system will only import data related to specific configuration types. Choose the **Next** button.
6. Close the wizard after the data has been successfully imported. Now, you can find all selected data in the system.

TIP

If the imported configuration type code is identical as the code already existing in the system, the user will receive a warning. If a configuration type name is repeated, the **Exists** field will be selected. To import such configuration type, you must change its name as well as code in the **Configuration Type Code** column. Otherwise, the system will display the error message.

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Work with Advanced Item Configurator

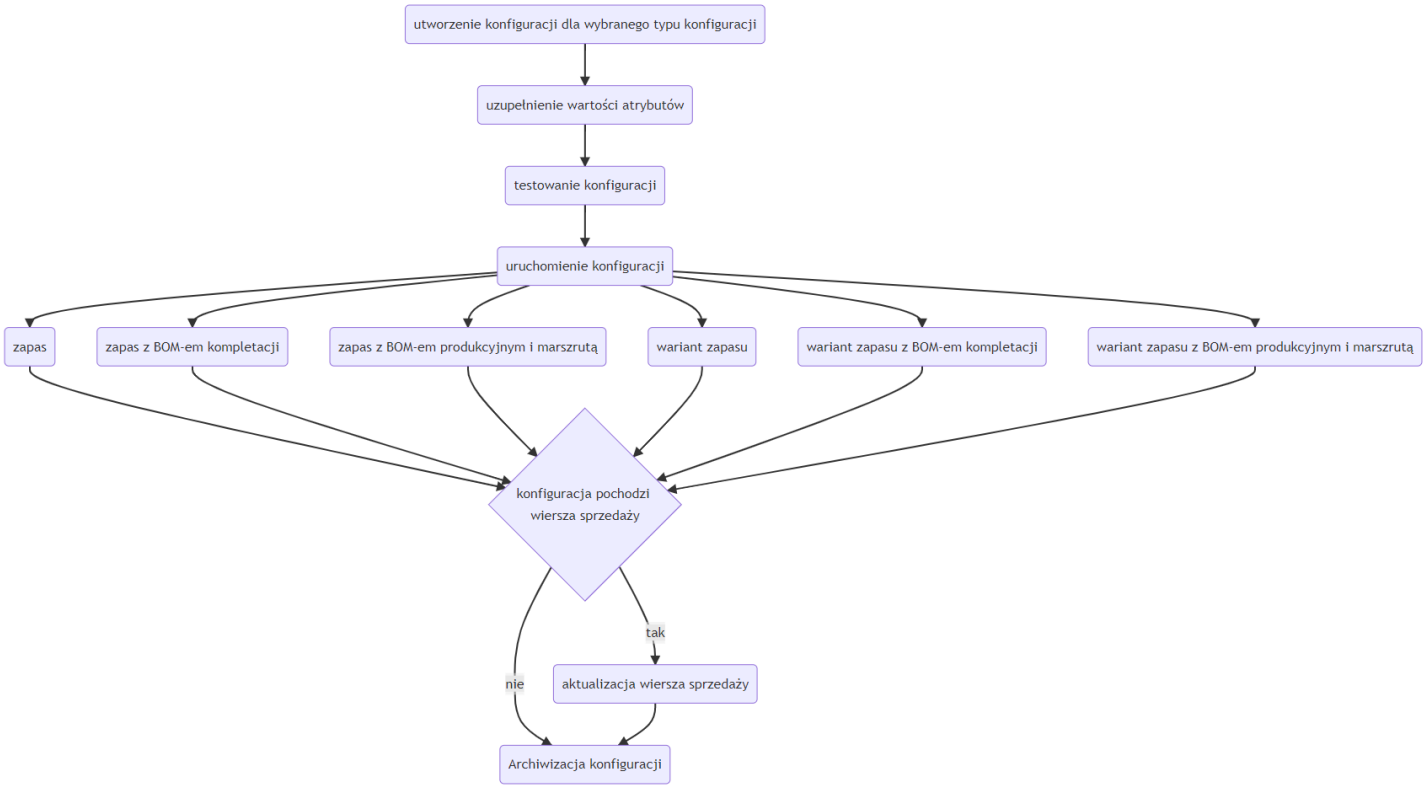
After entering the required user settings, configurator attributes and configuration types, you can start creating new items, item variants or production orders (according to the setup entered). The starting point of the process is the **Configuration** card. The configuration can be created in two ways:

- directly as a new configuration.
- indirectly through a sales order or a sales quote.

After creating the configuration, fill in the required data, test and run the configuration. Testing results in verification of potential errors that prevent the configuration from running. In this case, follow the error messages. Once the configuration is started, an item, item variant or production order is created. If the configuration was created from the sales line, the system will automatically update the sales line according to the configuration result.

The following is a simplified diagram of the process.

Diagram of the configuration process



TO	SEE
Learn how to create a new configuration	Create Configuration
Learn how to create configuration from the sales line	Create Configuration from Sales Line
Learn how to create a new item based on the existing item	Clone Item Card
Learn how to complete attributes and run configuration	Work with Configuration Card

See Also

Item Search

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Create Configuration

The process of creating new items, item variants and production orders, which aren't related to any specific purchase order, begins with creating a new configuration.

Create a new configuration

To create a configuration for a specific configuration type:

1. Choose the icon, enter **Configuration List**, and then select a related link.
2. On the **Configuration List** page, choose **New** to create a new configuration or choose the existing configuration and open its card in edit mode to make necessary changes.
3. Fill in the **Configuration Type Code** field that specifies the configuration type related to this configuration. After choosing the configuration type, the system will automatically fill in the attribute list, some field values inherited from the configuration type, and default attribute values.
4. In the next step, fill in the attribute values, test and run the configuration.

TO	SEE
Learn how to add attributes and run configuration	Work with Configuration Card

See Also

Work with Advanced Item Configurator

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Create Configuration from Sales Line

Advanced Product Configurator enables the creation of the new configuration from the sales order line or sales quote line. The result of running this configuration will be the creation of a new item card, item variant card or a production order and the system will automatically fill in the related sales line.

Create Configuration from Sales Line

To create the configuration from the sales line, complete the following steps:

1. Choose the icon, enter **Sales Orders** or **Sales Quotes**, and then select a related link.
2. Choose the **Sales Order** or the **Sales Quote** from the list or create new ones and create a new card in edit mode.
3. If you created a new sales order or sales quote, fill in the fields in the header.
4. In the sales line, in the **Type** field, choose the **Item** option and in the **No.** field enter the item number that was chosen as a configuration type template or leave the field empty.
5. From the **Line** tab select the **Functions** category and choose the **New Configuration** action.
6. The **Configuration** page will open. If the user didn't specify the item number in the sales line, the **Configuration Type Code** field will be empty. Fill in the **Configuration Type Code** field that specifies the configuration type related to this configuration.
7. In the next step, fill in the attribute values, test and run the configuration.

See Also

Work with Advanced Item Configurator

Work with Configuration Card

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Clone Item Card

Advanced Product Configurator offers a fast and easy way to create new items that differ in attribute values, within the same configuration type.

Creating Configuration for Similar Items

1. Choose the icon, enter **Configuration List**, and then select a related link.
2. Add a new configuration and open the card in edit mode.
3. Choose the **Clone Item** action on the **Manage** tab.
4. From the list, choose an item based on which you want to create a new item. Advanced Product Configurator will automatically enter item values based on the chosen item.
5. Modify the chosen item values, test and run configuration.

See Also

Work with Advanced Product Configurator

Work with Configuration Card

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Work with Configuration Card

The configuration represents the request for the creation of a new product based on the configuration type setup. It stores attribute values that define a specific product (item). After you fill in attributes and run the **Test Configuration** action, the Advanced Product Configurator will automatically generate values of fields such as **Description**, **Description 2**, **Net Weight**, **Vendor No.**, **Country Of Origin**, in accordance with configuration type setup. The system will also generate **BOM lines**, translations, descriptions, additional descriptions, additional units of measure etc. The generated data is saved in relation with the configuration and it will be used to recreate the item (configuration output) after the configuration is run. The result of the process is determined by the configuration type setup. Possible scenarios:

- an item is created;
- an item with an assembly BOM is created;
- an item with a production BOM is created;
- a new item variant is created;
- an item variant with an assembly BOM is created;
- an item variant with a production BOM is created;
- a production BOM and a production order are created. The sales line will be automatically updated by the system after the creation of an item ,if the configuration has been created on the sales line level.

The **Configuration** card is divided into three sections:

- The **General** section includes the following fields:
  - **No.** - Specifies the number that identifies a chosen configuration, which is assigned automatically from the number series.
  - **Sales Order No.** - Specifies the sales order from which the configuration was created. This field is filled in automatically ,if a configuration is created on the sales line level.
  - **Sales Order Line No.** - Specifies the sales order line from which the configuration was created. This field is filled in automatically ,if a configuration is created on the sales line level.
  - **Sales Quote No.** - Specifies the number of a sales quote from which the new configuration is created.
  - **Sales Quote Line No.** - Specifies the number of a sales quote line from which the new configuration is created.
  - **User ID** - Specifies the user that created the configuration. This field is filled in automatically.
  - **Configuration Type Code** - Specifies the configuration type for which the configuration is created.
  - **New Item No.** - Specifies the number of a new item that will be created from this configuration.
  - **New Item Variant Code** - Specifies the new item variant code that will be created from this configuration.
  - **Existing Item No. Found** - Specifies the number of the item which has the same values for attribute values defined in the configuration.
  - **Existing Item Variant No. Found** - Specifies the item variant number which has the same values for attribute values defined in the configuration.
  - **New Item/Variant Description** and **New Item/Variant Description 2** - Specifies the description of a new item created from this configuration.
  - **Base Unit Of Measure** - Specifies a base unit of measure of the item that will be created from this configuration.
  - **Net Weight** - Specifies net weight of the item that will be created from this configuration.
  - **Vendor No.** - Specifies the number of the vendor that will be created from this configuration.
  - **Country of Origin** - Specifies the country of origin of the item that will be created from this configuration.
  - **Tariff No.** - Specifies the number of the duty tariff of the item that will be created from this configuration.
  - **Routing No.** - Specifies the routing static number of the new item.
  - **Production BOM No.** - Specifies the number of the production BOM of the item that will be created from this configuration.
  - **Production BOM Unit of Measure** - Specifies the production BOM unit of measure of the item that will be created from this configuration.
  - **Item Type Description** - Specifies the description of the item type that will be created from this configuration.
  - **Tested** - Specifies ,if the configuration has been tested.

*The **Attributes** section includes the list of attributes with a given configuration type. You can choose attribute values from this list.

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- **Attribute Description** - Includes the description of the attribute.
- **Attribute Value Code** - Includes the attribute value, chosen by the user, that defines the product.
- **Calculated Value** - Specifies whether the attribute value is calculated automatically.
- **Multiple Values Possible** - Specifies ,if the attribute can have more than one value.
- **Leading Value** - Specifies ,if the value of the attribute will be used in the calculation.
- **Skip In Attribute Search** - Specifies that the attribute will be skipped in the search for the item/variant with the same attributes.
- **Value Description** - Specifies an attribute value description.
- **Unit** - Specifies the value unit.
- **Value Type Code** - Specifies the code of the attribute value type.
- **Value Type Description** - Specifies the value type description.
- The **Configuration** section includes the fields linked by the settings that allow the user to enable or disable the automation used in the fields of activity of Advanced Product Configurator for a specific configuration.
    - **Skip Auto No.** - Specifies ,if the automatic creation of an item number is to be skipped.
    - **Skip Auto Base UOM** - Specifies ,if the automatic creation of base and additional units of measure is to be skipped.
    - **Skip Auto Description** - Specifies ,if the automatic creation of item description is to be skipped.
    - **Skip Auto BOM** - Specifies ,if the automatic creation of the production or assembly BOM is to be skipped.
    - **Skip Auto Sales Price Calculation** - Specifies ,if the automatic creation of item sales prices is to be skipped.
    - **Skip Auto Purchase Price Calculation** - Specifies ,if the automatic creation of item purchase prices is to be skipped.
    - **Skip Auto Lead Time Formula** - Specifies ,if the automatic item lead time calculation is to be skipped.
    - **Skip Auto Extended Text** - Specifies ,if the automatic creation of item extended text is to be skipped.
    - **Skip Auto Resource** - Specifies ,if the automatic creation of the resources lines in the assembly BOM is to be skipped.
    - **Skip Auto Routing Creation** - Specifies ,if the automatic creation of routing lines is to be skipped.
    - **Show Item After Creation** - Specifies ,if the new item card is to be displayed after creating the item.

To run a created configuration, follow the steps described in the following sections.

Entering Configuration Attributes Values

1. Make sure that the **Configuration Type** field in the **General** section has been filled in.
2. Enter attribute values of the new item in the **Attribute Value Code** field in the **Attributes** section.
    - You can choose attribute values from the value list (if it was defined in the configuration type) by clicking the AssistButton in the **Attribute Value Code** field.
    - ,if no values are defined, you must enter the value in the **Attribute Value Code** field manually.
    - ,if the values you chose are invalid, follow the instructions from the message.

> **TIP**
>
> Some attributes can have more than one value. In this case, you can enter additional attribute values by choosing the **Manage** / **Add Multiple Value** action in the **Attributes** section. After the action is run, the system will add an attribute value line where you can enter an attribute value.

> **CAUTION**

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,if you choose multiple values for one attribute, only one of them will be used in item elements calculation. This value is marked as a **Leading Value**. To change the chosen (based on the configuration type settings) leading value, use the **Manage** / **Set Value as Leading Value** action in the **Attributes** section.

Testing the Configuration

1. Choose the **Manage** / **Test Configuration** action to test the configuration.
2. Advanced Product Configurator will test ,if all values of the required attributes have been entered and will automatically run functions that create product elements such as **Description**, **Translations**, **Extended descriptions**, **BOM**, in accordance with configuration type settings defined in the **Configuration** section.
3. ,if there are errors that stop the process, check them in the **Errors** information window and follow the instructions to eliminate the problems (e.g. change attribute values) and run the **Manage** / **Test Configuration** action again.
4. ,if the configuration has been tested and you can proceed to the next step, the **Tested** field in the **General** section will be automatically enabled.

Verifying Configuration

If testing was completed successfully, you can check ,if configuration output is correct. This step is not mandatory but its performance is recommended at the initial stage of configuration or in the configuration type setup testing phase.

1. Check ,if automatically generated field values in the **General** section are correct:
2. Check ,if product elements such as **BOM**, **sales price**, **purchase price**, **routing**, **extended** texts etc. are correct. To see elements, choose the **Navigate** action in the configuration.

TIP

,if you enable skipping auto creation of selected elements on the **Configuration** page, you can add them now.

Running configuration

1. To run configuration and create configuration output based on the **Configuration Type** card setup, choose the **Run Configuration** action from the **Manage** tab.
2. Advanced Product Configurator will automatically create a configuration output and update a related sales line (if configuration was created from the sales line).

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Item Search

The Advanced Product Configurator allows you to search for items that were created using configurations. The **Item Search** page consists of two list sections - the first one contains information about the attributes assigned to the configuration type selected in the **Configuration Type** field with the **Attributes** header and the second one contains the search results for the specified information about the **Search Results - Items** header.

To start item search:

1. Choose the icon, enter **Item Search**, and then select a related link.
2. On the **Item Search** page, in the **Item Type** field, select the configuration type that the searched item was created with.
3. If the selected configuration type has attributes, in the **Attributes** section, the system will automatically complete the attributes assigned to the selected **Attributes** configuration type.
4. Complete the attribute values you are looking for.
5. Then use the **Search** action in the top bar of the page.
6. In the **Search Results - Items** section, you will see the search result for the given filters. If no attribute guidelines were specified, all items created with the selected configuration type should be displayed as the search result.

TIP

If no item is found, use the **Go to Configuration** action to create configuration for the new item. Configuration attribute values will be filled in automatically with the values you were looking for.

See Also

Work with Advanced Item Configurator

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Created Card Administration

The Advanced Item Configurator allows you to administer the items created using the configuration. The functionality allows you to update inventory data based on the current settings of configuration types. You can update:

- Descriptions and translations
- Production BOM and assembly BOM
- Sales prices
- Purchase prices
- Net weight
- Country of origin
- Vendors

During the data update process for the selected item, in the background, the system will automatically create a configuration related to the configuration type from which the updated item was created, it will automatically complete the configuration attribute values based on the item attributes and run the configuration. Then, the existing item data will be updated based on the configuration output.

Item Update

To update data for items created using configuration:

1. Choose the icon, enter **Configurator Item Management**, and then select a related link.
2. Select one or more items from the list that you want to update. Use filters to filter the list as required.
3. Use the following actions to update the item data:
    - To update the description and translations of one currently selected card, choose **Actions**, **Single Record**, **Update Descriptions**
    - To update the BOM of one currently selected card, choose **Actions**, **Single Record**, **Update BOM**
    - To update sales prices of one currently selected card, choose **Actions**, **Single Record**, **Update Sales Prices**
    - To update purchase prices of one currently selected card, choose **Actions**, **Single Record**, **Update Purchase Prices**
    - To update net weight of one currently selected card, choose **Actions**, **Single Record**, **Update Net Weight**
    - To update the country of origin of one currently selected card, choose **Actions**, **Single Record**, **Update Country of Origin**
    - To update the vendor of one currently selected card, choose **Actions**, **Single Record**, **Update Vendor**
    - To update the description and translations of multiple selected cards, choose **Actions**, **Selected Records**, **Update Descriptions**
    - To update the BOM of multiple selected cards, choose **Actions**, **Selected Records**, **Update BOM**
    - To update sales prices of multiple selected cards, choose **Actions**, **Selected Records**, **Update Sales Prices**
    - To update purchase prices of multiple selected cards, choose **Actions**, **Selected Records**, **Update Purchase Prices**
    - To update net weight of multiple selected cards, choose **Actions**, **Selected Records**, **Update Net Weight**
    - To update the country of origin of multiple selected cards, choose **Actions**, **Selected Records**, **Update Country of Origin**
    - To update the vendor of multiple selected cards, choose **Actions**, **Selected Records**, **Update Vendor**

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4. After the action is run, the selected data will be updated.
    - In the case of updating the components of the production and assembly BOM, the end date in the existing BOM lines will be completed with yesterday's date (today's date -1), new BOM lines resulting from the current settings with the starting date of today will be added.
    - If you update sales and purchase prices, new price lines will be added with the starting date of today.
    - Other data will be overwritten.

See Also

Work with Advanced Item Configurator

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Product Lifecycle Policy

As all solutions developed by IT.integro work only as the add-ons to the main system, i.e. Microsoft Dynamics NAV/ Dynamics 365 Business Central, they are subject to the same product lifecycle policy as the main system, i.e. Microsoft Dynamics NAV/ Dynamics 365 Business Central.

Classification of changes in product versions

As part of product development and maintenance, IT.integro introduces the following changes in the offered products:

- **New versions (MAJOR type change - when changes are made to application elements that break API compatibility)**
    - Application releases to adapt IT.integro products to the appropriate versions of the main system. Versions may refer to new "Cummulative Updates" (CU), fixes (Fix) or full versions of the system, i.e. e.g. NAV 2018, Business Central 13 and 14. New versions may also introduce new functionalities to the modules themselves – such as listed below.
- **Functional extensions (MINOR type change - when new functionality that is compatible with previous versions is introduced)**
    - New functionalities required by law – functions introduced into the system in order to adapt the system to legal requirements or to change these requirements. By definition, they should include functionalities explicitly indicated in the law as binding for ERP systems, but the definition may be extended to functionalities supporting processes whose implementation outside the used ERP system would be technically difficult.
    - New development functionalities – features that improve work with the system, but are not obligatorily required by law. They are implemented as a result of feedback submitted by customers and project teams during implementation work at customers' locations and the result of technology development.
- **Fixes (PATCH type change - when the error is corrected and compatibility with previous versions is not broken)**

Product support periods

For each product created by IT.integro (as an ISV partner – Independent Software Vendor) for the corresponding versions of Microsoft Dynamics NAV/ Dynamics 365 Business Central, fixes are prepared during the standard product support period, as well as new versions and functionalities – in accordance with the definitions presented above. Support periods for each full version of the system are presented in the table.

VERSION NAME	VERSION RELEASE DATE	VERSION SUPPORT EXPIRATION DATE
NAV 2016	3 January, 2016	13 April, 2021
NAV 2017	27 October, 2016	11 January, 2022
NAV 2018	1 December, 2017	10 January, 2023
Dynamics 365 Business Central (BC 13)	1 October, 2018	14 April, 2020
Dynamics 365 Business Central on-premises Spring 2019 Update (BC 14)	1 April, 2019	10 October, 2023
Dynamics 365 Business Central on-premises 2019 Release Wave 2 (BC 15)	1 October, 2019	13 April, 2021

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VERSION NAME	VERSION RELEASE DATE	VERSION SUPPORT EXPIRATION DATE
Dynamics 365 Business Central on-premises 2020 Release Wave 1 (BC 16)	1 April, 2020	12 October, 2022
Dynamics 365 Business Central on-premises 2020 Release Wave 2 (BC 17)	1 October, 2020	12 April, 2022
Dynamics 365 Business Central on-premises 2021 Release Wave 1 (BC 18)	1 April, 2021	11 October, 2022
Dynamics 365 Business Central on-premises 2021 Release Wave 2 (BC 19)	1 October, 2021	12 April, 2023
Dynamics 365 Business Central on-premises 2022 Release Wave 1 (BC 20)	1 April, 2022	10 October, 2023
Dynamics 365 Business Central on-premises 2022 Release Wave 2 (BC 21)	3 October, 2022	14 April, 2024

Product Support Policy

1. Customers paying for the Enhancement Plan and partners have the right to download free of charge new versions of individual products, legally required functionalities and patch packages during these periods. Additional development features are also introduced to the new full versions of products - facilitating the use of solutions, but not obligatory from a legal perspective. They are not prepared for lower versions that are already functioning on the market. Their possible implementation in older versions will be priced each time by the project team.
2. Customers who do not pay for the Enhancement Plan will be charged for each fix or new version prepared according to the pricing for that version.
3. After the end of the standard support period for individual versions of produced solutions, no new legally required features or patch packages will be added to them. The technical feasibility of preparing and installing such fixes or new versions will be estimated and evaluated individually by the project team or a partner.
4. "Downgrade" of prepared solutions to earlier versions (not supported) for interested customers is considered and priced individually and implemented by project teams. Project teams take responsibility for preparing the "lower" version, checking its compatibility with the client's system and taking care of its installation in the client's system.
5. According to the Product Lifecycle Policy developed by Microsoft and adapted to its ISV solutions by IT.integro – paying Enhancement Plan fees after the period of standard support for the product does not entitle you to receive free fixes and new functionalities for the existing, unsupported version. However, the Enhancement Plan fee allows you to download a full newer version (compatible with the appropriate version of the main system) of a product and install it in your Microsoft Dynamics NAV/ Dynamics 365 Business Central system. We encourage customers to keep their systems as up-to-date as possible.
6. Installations of new versions and fixes are each time carried out in accordance with the terms of service provided by IT.integro as paid services.

See Also

Contact IT.integro

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Advanced Product Configurator App on AppSource

IT.intergo apps for companies in Poland and global companies

IT.integro's offer

Software Lifecycle Policy and Dynamics 365 Business Central On-Premises Updates

Dynamics 365 Business Central On-premises (Modern Policy)

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