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[Working with the Configuration Card](#)

[BOM Structure Preview](#)

[Item Search](#)

[Created Card Administration](#)

[Product Lifecycle Policy](#)

# 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, which 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 [appsales@it.integro.pl](mailto:appsales@it.integro.pl).

## Product Lifecycle Policy

- [Product Lifecycle Policy](#)

## Business Central - Base Application

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](#)

# 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	<a href="#">Advanced Product Configurator Roadmap</a>
Find information on functional changes and improvements	<a href="#">Releases</a>

## See Also

[Product Lifecycle Policy](#)

# 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
Global constants definition	<input type="checkbox"/> <input type="checkbox"/>	--
Global formulas definition	<input type="checkbox"/> <input type="checkbox"/>	--
Performance improvement	In progress	--



<b>FUNCTIONALITY</b>	<b>IMPLEMENTATION STATUS</b>	<b>PLANNED RELEASE DATE</b>
Hidden attributes	In progress	--
Hidden configuration type	In progress	--
Automatic creation of CNC programs	In progress	--

## See Also

[Releases](#)

# 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

- [3.2.0](#)
- [3.1.0](#)
- [3.0.1](#)
- [3.0.0](#)
- [3.3.1](#)
- [3.3.2](#)
- [3.3.3](#)

## See Also

[Administration](#)

Installation Procedure Support - Contact your Dynamics 365 Business Central partner

[Advanced Product Configurator on the Microsoft AppSource marketplace](#)

# 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	<a href="#">System Requirements</a>
Get to know how to install the application	<a href="#">Installation</a>
Learn more about the extension update process in Business Central	<a href="#">Application Upgrade</a>

# 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](#)

# 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	<a href="#">Advanced Product Configurator Installation</a>

## See Also

[Advanced Product Configurator](#)

# 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.

## Prerequisites

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, default 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

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

[Publishing and Installing an Extension.](#)

# 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
```




# Generate Demo Data

Advanced Product Configurator allows the user to generate demo data. Datasets make it easy to get started with the application quickly. Demo data includes, among others:

- configuration types;
- configuration type attributes;
- items necessary to create configurations;
- basic Advanced Product Configurator setup;
- basic company setup.

## IMPORTANT

In addition to Advanced Product Configurator objects demo data also includes base application Business Central setup and objects. Therefore, it is recommended to use a dataset in a newly created, blank company or in a company that contains CRONUS data. It ensures that company setup and company data are not overwritten by the Advanced Product Configurator demo data.

1. Choose the  icon, enter **Assisted Setup**, and then select a related link.
2. On the **Assisted Setup** page search for the **Advanced Product Configurator** record and choose the **Generate Demo APC Data Package** action.
3. In the next steps, follow the assisted setup instructions.
4. In the second step, you can view the list of conflicts generated when preparing demo data.

## IMPORTANT

If the **Assisted Setup** detects that Advanced Product Configurator demo data has already been generated in a specific company, it will not be possible to repeat the data import. To repeat data import, it is necessary to set up a new company. The remaining conflicts do not impede data import, but they can generate errors while using demo data.

5. Imported configuration types can be viewed in the next step. To learn more, see [Working with Demo Data](#).

## See also

[Working with demo data](#)

[Configuration Type](#)

[Application Setup](#)

[Working with Advanced Product Configurator](#)

# Working with Demo Data

## Available Configuration Types

To open the **Configuration Types** website, choose the  icon, enter **Configuration Type**, and then select a related link.

Configuration types can be freely modified. To learn more about configuration type setup, see [Configuration Type Setup](#).

Advanced Product Configurator demo data includes four parent configuration types and their subtypes:

1. **PHOTO FRAME**
2. **BICYCLE**
  - BICYCLE B-WHEEL
  - BICYCLE F-WHEEL
  - BICYCLE FRAME
3. **DRESSER**
  - DRESSER BASE
  - DRESSER LEGS
4. **BOOKCASE**
  - BODY
  - SIDE BOARD
  - TOP BOARD
  - BOTTOM BOARD
  - BACK BOARD
  - DRAWER BACK
  - DRAWER FRONT
  - DRAWER BOTTOM
  - DRAWER SIDE
  - DOOR FRONT
  - SHELF BOARD
  - VARNISHED BOARD
  - GLASS

All configuration types are complete so that they can be used to set up a configuration. Configuration types include attributes, BOM templates, routings and sales prices setup.

Each type also includes a preview graphic.

## Preparing Configuration

1. Choose the  icon, enter **Configuration List**, and then select a related link.

### TIP

To learn more about the configuration card setup, see [Working with the Configuration Card](#).

2. Create a new configuration.
3. Choose a configuration type, for example PHOTOFRAME, BICYCLE, DRESSER or BOOKCASE.

### TIP

The **Configuration Type Code** list includes parent types as well as subtypes. To use one of predefined parent types, choose one of the options below:

- PHOTOFRAME
- BICYCLE
- DRESSER
- BOOKCASE

After choosing a parent type, a preview graphic will appear on the right side of the website.

4. Enter attribute values. Related attributes will be displayed on a list depending on the configuration type that was selected. Fill in the attributes with required values.
5. Test the configuration. After entering attribute values, check if the configuration includes any errors. On the **Home Page** choose the **Test Configuration** action. Potential errors will appear on the right side of the page.
6. If the configuration does not contain any errors, you can run configuration by choosing the action in the main menu. By running the configuration, you complete the process of creating an item and all defined structures that are necessary to produce this item.

## See Also

[Configuration Type Setup](#)

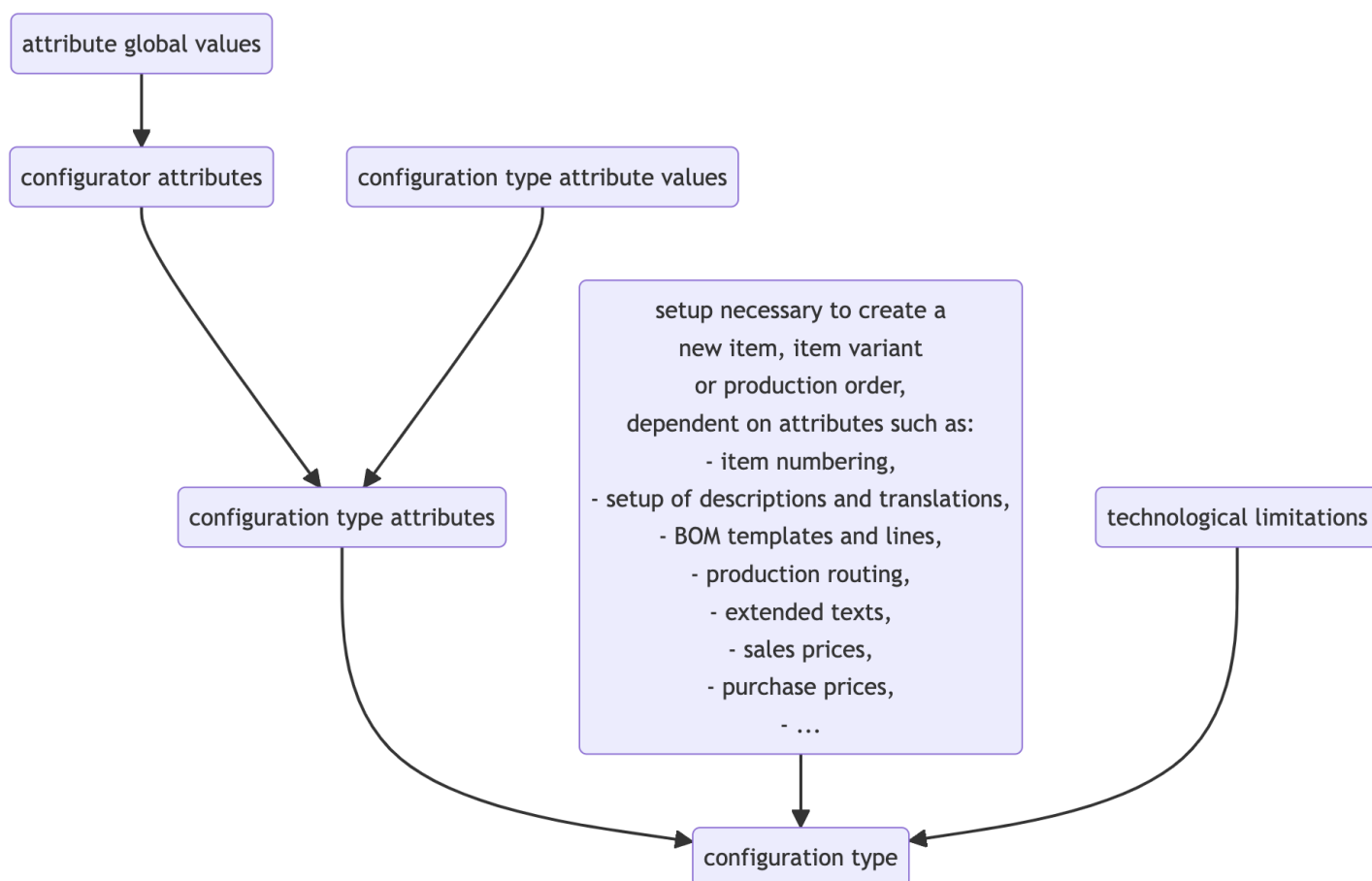
[Working with the Configuration Card](#)

[Generate Demo Data](#)

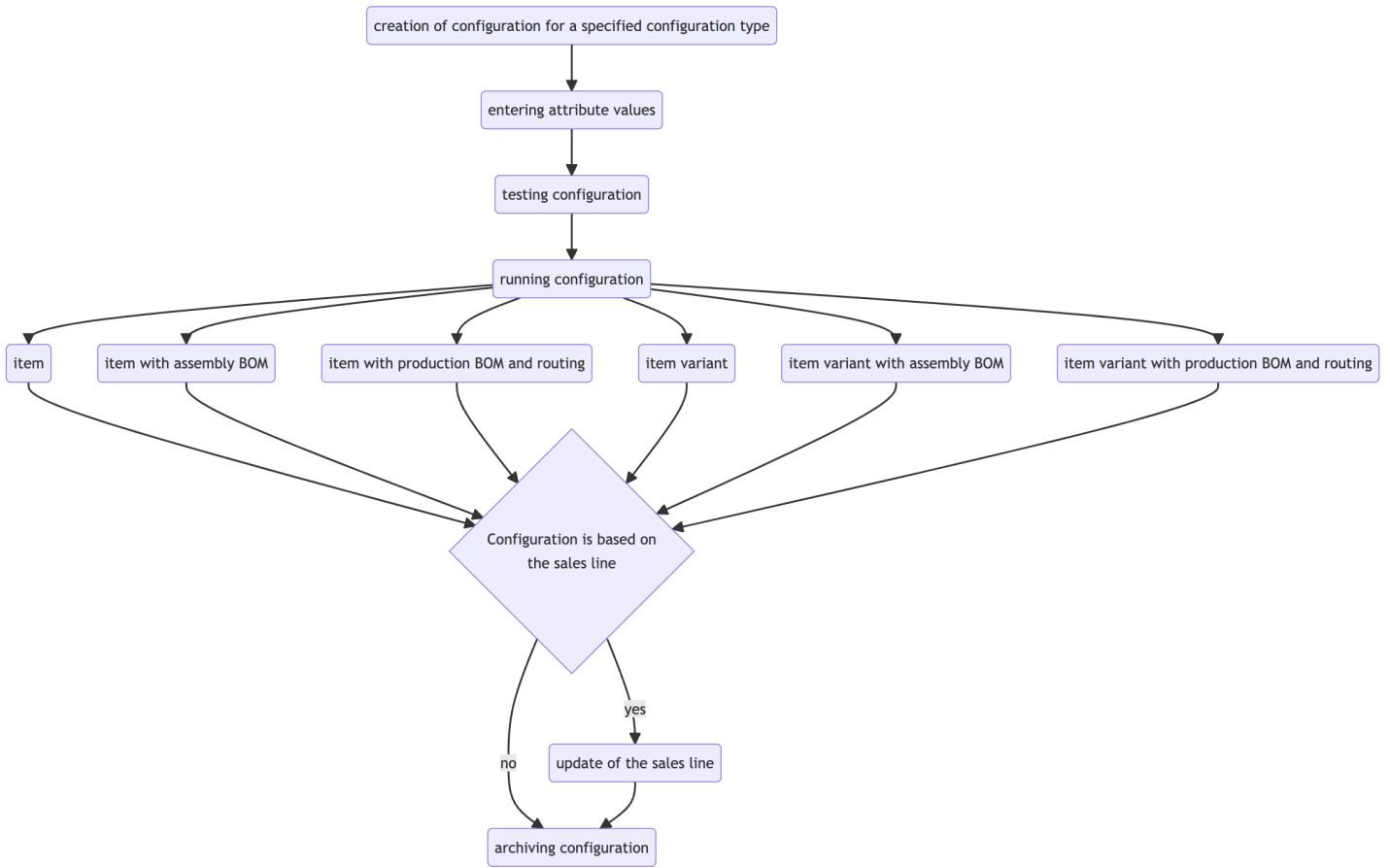
# Application Setup

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



TO	SEE
Learn how to define application setup	<a href="#">Main Setup</a>
Learn how to define user setup	<a href="#">User Setup</a>
Learn how to define attributes in Advanced Product Configurator	<a href="#">Configurator Attributes</a>
Learn how to set up the <b>Configuration Type</b> card	<a href="#">Configuration Type</a>
Learn more about the configuration process	<a href="#">Working with Advanced Product Configurator</a>

# Main Setup

To enter or modify the main setup of the application Advanced Product Configurator:

1. Select the Lightbulb icon , enter **Product Configurator Settings**, and then click the related link.
2. On the **Product Configurator Settings** page, 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 you will be prompted for confirmation when updating existing global attribute values.
  - **Block Delete Sales Lines** – Specifies whether deleting sales lines with a related configuration is allowed.
  - **Configuration Nos.** - Specifies configuration number series.
  - **Trigonometric Units** - Specifies from which units values for trigonometric functions will be calculated when enumerating formulas.

## TIP

You can also specify a language code independently for each user who uses the user settings.

## TIP

You can also specify configurator global constants on this page.

## See Also

[User Setup](#)


[Global Constants](#)

[Parametric Value Sets](#)

[Global Formulas](#)

# User Setup

To enter or modify user setup for Advanced Product Configurator:

1. Choose the  icon, enter **Product Configurator User Setup**, and then select a related link.
2. Enter or modify the setup for the selected user.
3. On the **Product 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](#)

# 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	<a href="#">Configurator Attribute Setup</a>
Learn how to define attribute translations	<a href="#">Attribute Translation Setup</a>
Learn how to define global attribute value translations	<a href="#">Global Attribute Value Translation Setup</a>
Learn how to define attribute value translations	<a href="#">Attribute Value Translation Setup</a>
Learn how to define global attribute value translations	<a href="#">Global Attribute Value Translation Setup</a>


## See Also

[Configuration Type](#)



# 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](#)

# 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** menu.
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](#)

# 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](#)


# 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](#)

# 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 <b>Configuration Type</b>	<a href="#">Configuration Type Setup</a>
Learn how to create the setup translations for a configuration type	<a href="#">Configuration Type Translation Setup</a>

# Configuration Type Setup

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

## Setup

To enter or modify the setup:

1. Choose the  icon, enter **Configuration Types**, and then select a related link.
2. On the **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 the **Configuration Type Card** page, fill in or modify the below fields.

The card is divided into the following sections:

- **General** - Includes fields that define the most important settings.
  - **Code** - Specifies the unique configuration type code. Depending on the settings, the field value is filled in automatically from the number series or manually.
  - **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. You can choose from the following options:
    - **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 the **Template Item No.** field will be created in this configuration type.. In addition, a new assembly BOM will be created for the created item card variant.
    - **Item Variant - Production BOM** - A new variant for the item card specified in the **Template Item No.** field will be created in this configuration type. In addition, an assembly BOM and routing will be created and assigned to a stockkeeping unit of a new item variant.
    - **Production Order** - A new production BOM and routing will be created in this configuration type. In addition, a new production order will be created for the new item that is set in the **Template Item No.** field and linked to this new BOM and the routing.
  - **Template Item No.** - Specifies the value of the **Template Item No.** field. The **Template Item No.** field will be used as a template when creating a new item using the configuration functionality. All necessary information for a new item such as: dimension settings, invoicing information, replenishment etc. will be taken from the template.
  - **Routing No.** - Specifies the static routing number that will be used when creating a new item/item variant with a production BOM or a production order. To learn more, see [Auto Routing Creation](#).
  - **Routing Type** - Specifies the automatic routing type.
  - The **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 a new item BOM.
  - **Auto Certify BOM** - If the field is selected, the newly created BOM will be automatically certified.
  - **No. of Configurations** - Specifies the number of existing configurations. The value is calculated automatically.
  - **No of Items** - Displays the number of existing items. The value is calculated automatically and the field is not editable.
  - **Validation Errors** - The number of configuration type validation errors.
- The **Auto Item No.** section - Includes fields related to automatic numbering setup for new item numbers or item variant codes. To learn more, see [Define an Item Counter for a Configuration Type](#).
- The **Custom BOM Number** section - Includes fields that define the custom numbering settings for newly created BOM

numbers. To learn more, see [Item Number or Item Variant Code Setup](#).

- The **Custom Routing Number** section - Includes the fields linked with custom numbering settings for newly created BOM numbers. To learn more, see [Routing Number Setup](#).
- The **Configuration Default Settings** section - Includes fields that define the settings that allow the user to enable or disable automation for configuration types in Advanced Product Configurator.
  - **Skip Auto Base UOM** - Specifies if the automatic creation of primary and secondary units of measure is to be skipped.
  - **Skip automatic BOM** - Specifies if the automatic creation of a production or assembly BOM is to be skipped.
  - The **Skip Auto Price Calculation** field - Specifies if the automatic creation of item sales prices is to be skipped.
  - **Skip Auto Purchase Price Calculation** - Specifies if the automatic creation of purchase prices for the item is to be skipped.
  - **Skip Auto Lead Time Calculation** - Specifies if the automatic item lead time calculation is to be skipped.
  - **Skip Auto Description** - Specifies if the automatic creation of the item description is to be skipped.
  - **Skip Auto Item No.** - Specifies if the automatic creation of the item number is to be skipped.
  - **Use the Custom BOM Number** - Specifies if the automatic creation of the BOM number is to be skipped.
  - **Skip Auto Extended Text** - Specifies if the automatic creation of extended text for the item 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 routing lines creation is to be skipped.
  - **Use Custom Routing No.** - Specifies whether to use the custom routing number.
  - **Show Item After Creation** - Specifies whether the new item card will be displayed after the item is created.

4. Specify the remaining setup linked with the configuration type, described in the articles listed below.

TO	SEE
Learn how to set up translations for a configuration type	<a href="#">Configuration Type Translation Setup</a>
Learn how to define configuration type attributes	<a href="#">Configuration Type Attributes</a>
Learn how to define the automatic creation of the item number or item variant code	<a href="#">Auto Item No. or Item Variant Code Creation</a>
Learn how to set the automatic creation of the item description	<a href="#">Auto Item Description or Item Variant Description Creation</a>
Learn how to set the automatic creation of a routing description	<a href="#">Routing Description Setup</a>
Learn how to set the automatic creation of the production or assembly BOM lines	<a href="#">Auto BOM Line Creation</a>
Learn how to set the custom numbering of a production BOM	<a href="#">Item Number or Item Variant Code Setup</a>
Learn how to set the automatic creation of the item sales prices	<a href="#">Auto Item Sales Price Creation</a>
Learn how to set the automatic creation of the item purchase prices	<a href="#">Auto Item Purchase Price Creation</a>
Learn how to set the automatic calculation of the item lead time formula	<a href="#">Auto Lead Time Formula Calculation</a>
Learn how to set up automatic routing creation	<a href="#">Automatic Routing Creation</a>
Learn how to set up custom routing numbering	<a href="#">Routing Numbering Setup</a>

TO	SEE
Learn how to define the technological limitations / configuration type errors	<a href="#">Technology Constraint Setup</a>
Learn how to set automatic creation of item units of measure	<a href="#">Auto Item Unit of Measure Creation</a>
Learn how to set resource lines for assembly BOMs	<a href="#">Define Configuration Type Resources</a>
Learn how to set the automatic assignment of the item's country of origin	<a href="#">Auto Country of Origin Code Assignment</a>
Learn how to set the automatic calculation of the item's net weight	<a href="#">Auto Net Weight Calculation</a>
Learn how to set the automatic assignment of the item vendor's number	<a href="#">Auto Vendor Number Assignment</a>
Learn how to set the automatic creation of the item's extended texts	<a href="#">Auto Item Extended Text Creation</a>
Learn how to set up automatic assignment of default dimensions	<a href="#">Automatic Assignment of Default Dimensions</a>
Learn how to set attribute values to be automatically transferred to inventory table fields	<a href="#">Automatic Transfer of Attribute Values to Item Table Fields</a>
Learn how to view the structure of a BOM	<a href="#">BOM Structure Preview</a> [(apc-configuration-type-bom-structure.md)]

## See Also

[Nested Configurations](#)

[Validate Configuration Type Setup](#)

[Release Configuration Type](#)

[Release Configuration Type](#)

[Block Configuration Type](#)

[Setup Import and Export](#)

[Copy Configuration Type](#)

[Auto Routing Creation](#)

[Auto Routing Creation](#)




# 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 **Configuration Type** 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](#)

# 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	<a href="#">Configuration Type Attribute Setup</a>
Learn how to define configuration type attribute values	<a href="#">Configuration Type Attribute Value Setup</a>
Learn how to define configuration type attribute value translations	<a href="#">Configuration Type Attribute Value Translations</a>
Learn how to define dependencies between configuration type attributes	<a href="#">Attribute Value Conditions Setup</a>
Learn how to define calculated attributes	<a href="#">Calculated Attributes</a>
Learn how to define calculated attributes values	<a href="#">Calculated Attribute Setup</a>

## See Also

[Configurator Attributes](#)


[Copy Configuration Type Attributes](#)

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

## See Also

[Configuration Type Attribute Value Setup](#)


[Copy configuration attributes](#)

# Define Extended Descriptions for Attributes

Advanced Product Configurator provides settings that allow users to create extended descriptions for attributes. With this feature, users who complete the attribute values in the configuration can better understand what function the attribute performs and how to complete it. An attribute extended description is shown in the FactBox on the configuration page.

## Setup

To define extended descriptions for attributes:

1. Choose  icon, enter **Configuration Types**, and then select a related link.
2. Select the configuration type for which you want to add extended descriptions for attributes.
3. In the **Configuration Type** menu, select the **Attributes** action.
4. Select the attribute from the list, and then, in the **Navigate** menu select the **Extended Description** action.
5. Fill in the extended description lines.

## See Also

[Define Attribute Extended Description Translation](#)

[Define Attributes](#)

[Configuration Type Attribute Values](#)


[Item Description Setup](#)

# Define an Attribute Extended Description Translation

In Advanced Product Configurator you can add an extended description translation of an attribute in the language spoken by the application user. The description text is automatically displayed according to the settings you define.

## Translation Setup

To define attribute extended description translations:

1. Choose  icon, enter **Configuration Types**, and then select a related link.
2. Select the configuration type for which you want to add a translation of the attribute extended description.
3. In the **Configuration Type** menu select the **Attributes** action.
4. On the **Configuration Type Attributes** list page, select the attribute that you want, and then, in the **Navigate** menu select the **Extended Description** action.
5. On the **Attribute Ext. Description** page, in the **Navigate** menu, select the **Extended Description Translations** action.
6. Fill in the translation lines for the extended description.

## See Also

[User Setup](#)

[Define Extended Descriptions for Attributes](#)

[Attribute Setup](#)

[Configuration Type Attribute Values](#)

[Item Description Setup](#)


# 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 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](#)

# 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](#)

# 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	<a href="#">Calculated Attributes Setup</a>



# 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 **Home** 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](#)

# Formulas Setup

Within Advanced Product Configurator, you can define mathematical formulas in many places. 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
-	subtracting
*	multiplication
/	division
^	exponentiation

- The ABS() function returns the absolute value of the argument;
- The SIN() function returns the sine of the argument (angle);
- The COS() function returns the cosine of an argument (angle);
- The TAN() function returns the tangent of the argument (angle);
- The ASIN() function returns the arcsine of the argument, the inverse of the sine;
- The ACOS() function returns the arccosine of the argument, the inverse of the cosine;
- The ATAN() function returns the arctangent of the argument, the inverse of the tangent.
- Global constants.
- Global formulas.
- Parametric Value Sets.
- Variable values of numeric attributes selected or typed by the user in the configuration. These values are defined by the VAL(Attribute Code) symbol.

## TIP

To easily select an attribute code, a global constant or global formula, you can use the AssitEdit button in the **Formula** field.

Examples of simple formulas and a result of the operation have been listed 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
SIN(VAL(height))	90		1
COS(VAL(height))	0		1
TAN(VAL(height))	45		1
ASIN(VAL(Height))	0		0
ACOS(VAL(Height))	0		1.571
ATAN(VAL(Height))	45		0.665

## Insert Attribute Values into a Formula

The value of an attribute in a formula is represented by the VAL (*attribute name*) function. To easily insert an attribute code into a formula:

1. Click the AssistEdit button in the **Formula** field.
2. In the next window, select the element you want to insert: **Attribute Value** and choose the **OK** button.
3. From the list, select the attribute the value of which you want to insert into the formula.
4. Select the **OK** button. The VAL (*attribute name*) function should appear in the **Formula** field.

## Inserting Global Constant Values into a Formula

The value of a global constant in a formula is represented by the global constant code. To easily insert a global constant into a formula:

1. Click the AssistEdit button in the **Formula** field.
2. In the next window, select the element you want to insert: **Global Constant** and choose **OK**.
3. From the list, select the code of the global constant the value of which you want to insert into the formula.
4. Select the **OK** button. The code for the global constant should appear in the **Formula** field.

## Inserting Parametric Values into a Formula

Formula parametric value is represented by the function: PAR(*Parametric Value Set Code;Parameter 1 Value;Parameter 2 Value*). To easily insert a parametric value into a formula:

1. Click the AssistEdit button in the **Formula** field.
2. In the next window, select the element you want to insert: **Parametric Value** and choose the **OK** button, to proceed.

3. In the next window, fill in the field values:

- **Parametric Value Set Code** - Specifies the parametric value set code to be used in the formula.
- **Parameter 1** - Specifies the value of parameter 1 of the selected set of parametric values. The value in this field can be defined as a global constant, an attribute value, a value of another parametric value, a global formula. Use the AssistEdit button to select the required value.
- **Parameter 2** - Specifies the value of parameter 2 of the selected set of parametric values. The value in this field can be defined as a global constant, an attribute value, a value of another parametric value, a global formula. Use the AssistEdit button to select the required value.

5. Select the **OK** button. The correct format for the parametric value should appear in the **Formula** field.

## Inserting global formula values into a formula

The global formula in a formula is represented by the global formula code: *Global Formula Code (Parameter 1 Value;Parameter 2 Value;...;Parameter 9 Value)*. To easily insert a global formula value into a formula:

1. Click the AssistEdit button in the **Formula** field.
2. In the next window, select the element you want to insert: **Global formula** and choose the **OK** button to move on.
3. In the next window, fill in the field values:

- **Global Formula Code** - Specifies the global formula code to be used in the formula.
- **Parameter 1..9** - Specifies the value of parameter 1..9 of the global formula. The values in these fields can be defined as a global constant, an attribute value, a value of another parametric value, a global formula. Use the AssistEdit button to select the required value.


The number of parameter values to be filled in is consistent with the number of parameters used in the formula as %1..%9.

5. Select the **OK** button. The correct format for the global formula should appear in the **Formula** field.

## Units for Trigonometric Functions

For trigonometric functions, the argument of the function can be expressed in degrees or radians. You should specify the correct unit in the Advanced Product Configurator setup.

To set the unit for trigonometric functions:

1. Select the Lightbulb icon , enter **Item Configurator Settings** and then select the related link.
2. In the **Trigonometric Units** field, select a unit for the trigonometric function argument.

TO	SEE
Learn how to define global constants	<a href="#">Global constant setup</a>
Learn how to define global formulas	<a href="#">Global formulas setup</a>
Learn how to define parametric value sets	<a href="#">Parametric value sets</a>

# 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:  $\leq$ ,  $<$ ,  $=$ ,  $>$ ,  $\geq$ . 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			$\leq$			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.

**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)**

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](#)

# 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 **Item** 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, specifies a related value, for example, a numbering series code or an attribute code.
  - The **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]



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

## See Also

[Define a Counter for a Configuration Type](#)


[Copy Item Variant Code/Number Setup](#)

# Define an Item Counter for a 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 Item No.** section define the following field values:
  - o **Last Used Counter** - Specifies the counter that was used last time.
  - o **Counter - No. of Characters** - Specifies the number of characters of a generated counter.
  - o **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](#)

# 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	<a href="#">Item Description Setup</a>

# Item and Routing 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 for the created item or routing.

## 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**, **Item Description 2 Setup** or **Routing Description 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 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		[ ]

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 **Length** = 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

[Copy Item Description Setup](#)

[Configuration Type Translation Setup](#)

[Attribute Translation Setup](#)

[Global Attribute Value Translation Setup](#)

[Configuration Type Attribute Value Translations](#)

[Configuration Type](#)

# 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	<a href="#">Configuration Type BOM Template Setup</a>
Learn how to set configuration type BOM template components	<a href="#">Configuration Type BOM Template Component Setup</a>
Learn how to define quantity formulas for a configuration type BOM component	<a href="#">Configuration Type BOM Line Quantity Formulas Setup</a>


# 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 **BOM** 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](#)

[Copy BOM Template](#)

[Item Number or Item Variant Code Setup](#).


# Setting up Components of a Configuration Type BOM Template

Each configuration type has individual settings related to the automatic creation of production or assembly BOM lines using a BOM template.

- A BOM template consists of groups of components.
- Each component group can contain any number of BOM components.

## Setup

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

1. Choose  icon, enter **Configuration Types**, and then select a related link.
  2. On the **Configuration Types** list page, select the type that you want, and then open the configuration type tab.
  3. On the **Configuration Type Card** page in the **BOM** menu, select the **BOM Template** action.
  4. On the **Configuration Type Component Groups** tab select the group you want, and then in the **Navigation** menu select the **BOM Lines** action.
  5. On the **Configuration Type BOM Lines** page create new lines or modify existing lines by filling in the fields as needed.
- **Type** - Specifies the type of a BOM component.

### TIP

The BOM component type can be another configuration type. The functionality allows you to create nested configuration types that are dependent on each other, which allows you to create both master inventory and component inventory at the same time. To learn more, see: [Nested Configurations](#).

- **No.** - Specifies the number of a BOM component.
  - **Unit of Measure Code** - Specifies the unit of measure code for the BOM component.
  - **Qty. Rounding Precision** - Specifies to which multiple of which value the rounding will occur.
  - **Qty. Rounding Direction** - Specifies how rounding occurs. Possible values are **Nearest value, Up** and **Down**.
  - **Description** - Specifies a description of the BOM component.
  - **Description 2** - Specifies a description 2 of the BOM component.
6. In the next step, define or modify the conditions for the lines. To specify conditions for the selected row, in the **Navigation** menu select the **Conditions** action. To learn more, see the [Conditions Setup](#) article.

### TIP

Advanced Product Configurator allows you to easily copy conditions from other lines. To copy conditions:

1. Choose a line to which you want to copy conditions.
  2. In the **Processing** menu select the **Copy Conditions** action.
  3. Choose a line from which you want to copy conditions.
  4. Select the **OK** button.
7. Set quantity formulas for each line. For details, see [Setting up Quantity Formulas for a Configuration Type BOM Component](#)

## See Also



[Creating BOM Lines Automatically](#)

[Setting up Quantity Formulas for a Configuration Type BOM Component](#)

[Conditions Setup](#)

[Nested configurations.](#)


[BOM No. Setup](#)

# 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 **BOM** 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](#)

# 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	<a href="#">Sales Price Formula Setup</a>
Learn how to set up sales price surcharges	<a href="#">Sales Price Surcharges Setup</a>

# 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 **Prices** 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 contain 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.

4. Choose the **OK** button.

## See Also


[Configuration Type](#)

# 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 **Prices** 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](#)

# 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	<a href="#">Purchase Price Formula Setup</a>
Learn how to set up purchase price surcharges	<a href="#">Purchase Price Surcharges Setup</a>

# 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 **Prices** 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](#)




# 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 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 **Purchase Price Formulas** action on the **Prices** 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](#)

# 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	<a href="#">Lead Time Formulas</a>
Learn how to set up extended lead time	<a href="#">Extended Lead Time</a>

## See Also


[Configuration Type](#)

# 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 **Item** 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](#)

# 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 **Item** 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](#)

# 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	<a href="#">Static Routing Setup</a>
Learn how to create a dynamic routing	<a href="#">Dynamic Routing Setup</a>

# 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	<a href="#">Dynamic Routing Setup</a>

## More information

[Create Routings in Business Central](#)

# 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 **Routing** 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.

## Routing Description Setup

You can add a routing description to an automatically created routing. To learn, how to add a routing description, see [Routing Description Setup](#).

## See Also

[Configuration Type](#)

Conditions Setup

Routing Description

Routing Number Setup



# 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 constraints, 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	<a href="#">Configuration Type Error Setup</a>

# 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 **Configuration Type** 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](#)

[Configuration Type Errors Translations](#)

# 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	<a href="#">Base Unit of Measure Setup</a>
Learn how to define configuration type additional units of measure	<a href="#">Additional Units of Measure Setup</a>

# 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** field is not selected.
4. Choose the **Base UOM** action on the **Item** 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](#)

# 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 **Item** 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](#)


# 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	<a href="#">Resources Setup</a>

# 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 **Item** 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	<a href="#">Formulas Setup</a>

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	<a href="#">Conditions Setup</a>

## 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 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	<a href="#">Country Of Origin Setup</a>




# 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 **Item** 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.
  - o **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](#)

# 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	<a href="#">Net Weight Formula Setup</a>

# 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 **Item** 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	<a href="#">Formulas Setup</a>

- **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	<a href="#">Conditions Setup</a>

### 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 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.	<a href="#">Vendor Setup</a>

# 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 **Item** 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.
  - o 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](#)

# 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	<a href="#">Extended Text Setup</a>

# 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 **Item** tab.
5. Choose the **New** action to create a new extended text or mark an existing extended text and open 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 the sequence for adding the string the extended text line.

- **Type** - Specifies the type of the position. The following options are available:
  - **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 Description**, **Attribute Value** or **Attribute Value 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.

### TIP

Advanced Product Configurator allows you to easily create conditions for each of the defined lines. To create conditions:

1. Select the line you want to create conditions for.
2. In the **Navigate** menu, select the **Conditions** action.
3. Set the conditions as needed. [Condition Settings](#).

## 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](#)

[Global Attributes Value Translations](#)

[Configuration Type Attribute Value Translations](#)

[Configuration Type](#)

# Automatic Assignment of Default Dimensions

The Advanced Product Configurator allows you to automatically assign default dimensions to newly created inventory using configurations. Choosing the right combination of dimensions and dimension values can depend on attribute values.

In the first step of creating a new item from the configuration, Advanced Product Configurator copies the default values of the template item dimensions to the newly created item, and then in the second step, completes the default dimension values that are set for the configuration type.

TO	SEE
Learn how to set default dimensions	<a href="#">Default Dimension Setup</a>

# Default Dimensions Setup


Each configuration type has individual settings related to the automatic assignment of default dimensions to newly created items.

## CAUTION

Default dimension setup is available only if the result of the configuration is **Item - Production BOM** or **Item - Assembly BOM**.

## Setup

To enter or modify the setup:

1. Choose the  icon, enter **Configuration Types**, and then select a related link.
2. Select the configuration type from the list, then open the card.
3. On the **Configuration Type** card, select the **Default Dimensions** action from the **Item** tab.
4. On the **Configuration Type Default Dimensions** page create new lines or modify the existing ones. Fill in the following fields:
  - **Dimension Code** - Specifies the default dimension code.
  - **Dimension Value Code** - Specifies the dimension value code to be suggested as the default dimension.
  - **Dimension Value Posting** - Specifies how the default dimension and values are used.
  - **Allowed Values Filter** - Specifies the dimension values that can be used for the selected dimension.
5. Define or modify the conditions in the lines. To specify conditions for a selected line, choose the **Conditions** action on the **Navigation** tab. To learn more, see the [Conditions Setup](#) article.

## TIP

Advanced Product Configurator allows you to easily copy conditions from other lines. To copy conditions:

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

## See Also

[Configuration Type](#)

[Conditions Setup](#)

# Automatic Transfer of Attribute Values to Item Table Fields

The Advanced Product Configurator allows you to automatically transfer the values of any configuration attributes to selected fields of newly created items. The functionality can be used to calculate and set values that are not directly supported by Advanced Product Configurator or custom fields - derived from other extensions Business Central.

TO	SEE
Learn how to set up attribute value transfer	<a href="#">Attribute Value Transfer Setup</a>

# Attribute Value Transfer Setup


Each configuration type has individual settings related to the automatic transfer of attribute values to selected fields of the **Item** table.

## CAUTION

Attribute value transfer setup is available only if the configuration result is set to **Item - Production BOM** or **Item - Assembly BOM**.

## Setup

To enter or modify the setup:

1. Choose the  icon, enter **Configuration Types**, and then select a related link.
2. Select the configuration type from the list, then open the card.
3. On the **Configuration Type** card, select the **Attribute Value Transfer** action from the **Item** tab.
4. On the **Configuration Type Attribute Value Transfer** page create new or modify the existing lines. Fill in the following fields:
  - **Attribute Code** - Specifies the attribute code of the configuration type.
  - **Attribute Description** - Specifies the description of the configuration type attribute (non-editable field).
  - **Attribute Value Type** - Specifies the value type of the configuration type attribute (non-editable field).
  - **Target Field No.** - Specifies the number of the target field in the **Item** table.
  - **Target Field Name** - Specifies the name of the target field in the **Item** table (non-editable field).

## See also


[Configuration Type](#)

[Conditions Setup](#)

# 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.

# 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 **Actions** tab choose the **Copy Configuration Type** action.
4. Enter values in the following fields:
  - o **Target Configuration Type Code** that specifies configuration type code of the copy.
  - o **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](#)

# 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 **Actions** tab.
4. Choose the configuration type from which you want to copy attribute settings.
5. Choose the **OK** button.

## See Also

[Configuration Type](#)




# 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 **Actions** tab.
4. Choose the configuration type from which you want to copy error settings.
5. Choose the **OK** button.

## See Also

[Configuration Type](#)


# Release a 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 **Home** 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	<a href="#">User Setup</a>
Learn how to set up the configuration type	<a href="#">Configuration Type</a>

# Block a 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** 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](#)

# Nested Configurations

Advanced Product Configurator allows you to create a production or assembly BOM that contains 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 (in which case it is a separate item).

Handling such dependencies is possible by using the configuration type as the BOM template line type for the parent configuration type.

In the example described above, the bike is the parent configuration type for the frame item.

When you run 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.
- Automatically run child configurations and add created items to the parent BOMs.

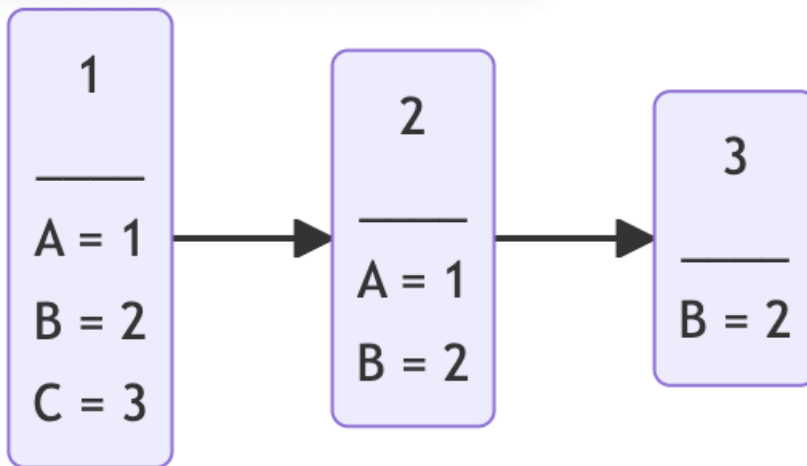
## Example

1. The following configuration types have been created:
  - Configuration type "1" is the parent type and has attributes "A", "B" and "C".
  - Configuration type "2" is subordinate to "1" and has attributes "A" and "B".
  - Configuration type "3" is subordinate to "2" and has the attribute "B".
  - In configuration types "2" and "3".
2. A configuration has been created for type "1" that populates the following attribute values:
  - A = 1,
  - B = 2,
  - C = 3.
3. The created configuration is run.

## Output:

- When you run the configuration for type "1", a configuration for child type "2" will be created automatically.
- For the created configuration for type "2", the values of the attributes "A" and "B" (inherited from the configuration "1") will be automatically completed.
- The system will automatically test and run the configuration for type "2".
- When you run the configuration for type "2", a configuration for child type "3" will be created automatically.
- For the created configuration for type "3" the attribute values "B" (inherited from configuration "2") will be automatically populated.
- The system will automatically test and run the "3" configuration.

# Attribute Values in Configurations




As you can see in the diagram above, attribute values that are common to both configurations, have been passed from the parent configuration to the child configuration. If a child configuration contains a mandatory attribute that does not exist in the parent configuration, the system will display an error message and the processing will be stopped.

# Setup Import and Export

Advanced Product Configurator allows you to easily export and import the configuration type setup. The data is exported to an xml file, which can then be imported into another database or company.


## Export

To export specific configuration type settings to an 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 **Next**.
5. The system will close the page and begin downloading the XML setup file.

## Import

To import configuration type setup 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 Actions** choose **Import** and **Next**.
3. Select the xml or zip file, from which you want to get data. It must be a file created by the wizard, otherwise the functionality will not work properly.
4. Select the configuration types you want to import from the list by selecting the **Include in Import/Export** checkbox (only the selected configuration types will be created in the system).
5. Decide whether common data such as attributes, values, and types are necessary for import by selecting the **Include in Import/Export** (all common data will be saved in the system). Otherwise, only common data related to the selected configuration types will be imported. Then, choose **Next**.
6. After the data is imported successfully, the system closes the wizard. Now, all selected data should be in the system.

### TIP

If the imported configuration type code is identical as the code already existing in the system, a warning is displayed. Any repetitive configuration type names are selected in the **Exists** field. To import such configuration type, you should first rename it by selecting the unused code in the **Configuration Type Code** column. Otherwise, if you try to import this configuration type without renaming it, an error message will be displayed.

# Working with Advanced Product Configurator

After setting up 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 process should be initiated on the **Configuration** card page. You can set up a configuration in the two following ways:

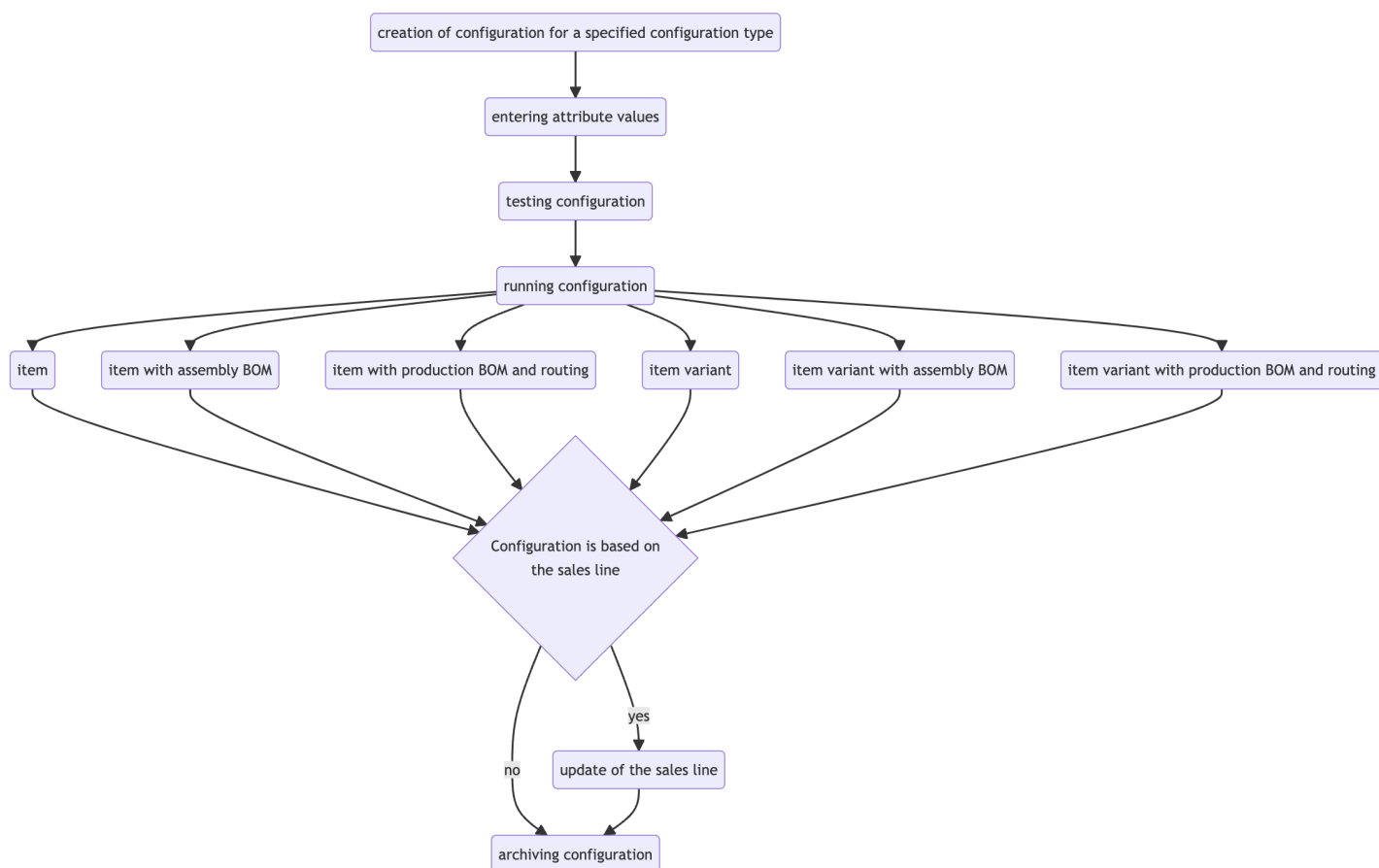
- directly as a new configuration,
- indirectly, based on a sales order or a sales quote.

After creating the configuration, fill in the required data, test and run the configuration. By testing the configuration, you can detect potential errors that make running the configuration process impossible. If any errors are detected, follow the instructions displayed in error messages.

After running the configuration, an item, item variant or a production order is created. If the configuration was created from a sales line, the system automatically updates the sales line according to the configuration values.

The following is a simplified diagram of the process.

## The diagram of the configuration process



TO	SEE
Learn how to create a new configuration	<a href="#">Create a Configuration</a>
Learn how to create a configuration from the sales line	<a href="#">Create a Configuration from a Sales Line</a>
Learn how to create a new item based on the existing item	<a href="#">Clone the Item Card</a>
Learn how to complete attributes and run the configuration process	<a href="#">Working with the Configuration Card</a>

## See also

[Generate Demo Data](#)

[Item Search](#)

[Created Card Administration](#)




# 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	<a href="#">Work with Configuration Card</a>

## See Also


[Work with with Advanced Product Configurator](#)

# Creating Configuration from Sales Line

Advanced Product Configurator allows you to create a new configuration from a sales order or sales quote line. As an output of running the configuration created in this way, a new item card, item variant, or production order is created. In addition, the system automatically populates the related sales line.

## Creating Configuration from Sales Line

To create a configuration from a sales line, follow these steps:

1. Select the Lightbulb icon , enter **Sales Orders** or **Sales Quotes**, and then click the related link.
2. On the list page, select an existing sales order or sales quote, or create a new one, and then open the card in edit mode.
3. If a new order or a quote has been created, fill in the header fields.
4. On the sales line, in the **Type** field, select **Item**, and leave the **No.** field blank.
5. From the **Line** tab select the **Functions**, category and run the **New Configuration** action.
6. The **Configuration** page starts automatically.
7. Fill in the **Configuration Type Code** field.
8. Complete the attribute values, test and run the configuration.
9. When the configuration starts, the system automatically inserts the created item on the line and completes the **Configuration No.** field that specifies the configuration number associated with the sales line.

### WARNING

Be sure to use this way to create configurations to leave the **Item No.** field on the sales line blank. Otherwise, the application will terminate the process and return an error.

## See Also


[Working with Advanced Product Configurator](#)

[Working with the Configuration Card](#)

# Clone an 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](#)

# Working with the Configuration Card

The configuration functionality allows you to handle the request to create a new product based on the configuration type setup. As part of the configuration process, you specify attribute values for a specific product (item). After completing the attributes and running the **Test Configuration**, action the Advanced Product Configurator will automatically generate field values such as **Description, Description 2, Net Weight, Vendor No., Country of Origin** according to the configuration type setup. BOM lines, translations, extended descriptions, additional units of measure will also be generated. The generated data is written in relation to the configuration and will be used when the configuration is run to create the product (configuration output).

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 production order are created. If the configuration was created from the sales line, when the product is created, the system automatically updates the sales line.

## Defining the Configuration Setup

The **Configuration Card** page is divided into three FastTabs:

- The **General** FastTab contains the following fields:
  - **No.** - Specifies the number identifying the given configuration; the number is assigned automatically from the number series.
  - **Sales Order No.** - Specifies from which sales order the configuration was created. The field is automatically populated if the configuration comes from a sales line.
  - **Sales Order Line No.** - Specifies from which sales order line the configuration was created. The field is automatically populated if the configuration comes from a sales line.
  - **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 which user created the configuration. The field is filled in automatically.
  - **Configuration Type Code** - Specifies for which configuration type the configuration is created.
  - **New item No.** - Specifies the number of the new item that will be created from the configuration.
  - **New Item Variant Code** - Specifies the code for the new item variant that will be created from the configuration.
  - **Existing Item No. Found** - Specifies the item number that has the same values for the set attribute values in the configuration.
  - **Existing Item Variant Found** - Specifies the item variant number, which has the same values for the set attribute values in the configuration.
  - **New Inventory/Variant Description** and **New Item/Variant Description 2** - Specify descriptions of the new item that will be created from the configuration.
  - **Base Unit of Measure** - Specifies the base unit of the new item that will be created from the configuration.
  - **Net Weight** - Specifies the net weight of the new item that will be created from the configuration.
  - **Vendor No.** - Specifies the vendor number of the item that will be created from the configuration.
  - **Country of origin** - Specifies the country of origin number of the item that will be created from the configuration.
  - **Tariff No.** - Specifies the number of the duty tariff of the item that will be created from the configuration.
  - **Routing No.** - Specifies the static routing number of the new item.
  - **Production BOM No.** - Specifies the BOM number of the item that will be created from the configuration.
  - **Production BOM Unit of Measure** - Specifies the unit of measure for the production BOM of the item that will be created from the configuration.
  - **Item Type Description** - Specifies a description of the item type that will be created from the configuration.

- **Tested** - Specifies whether the configuration has been tested.
- The **Attributes** FastTab lists the attributes that are associated with the configuration type and lets you select attribute values.
  - **Attribute Description** - Specifies a description of the attribute.
  - **Attribute Value Code** - Specifies the attribute value selected by the user specifying the product.
  - **Calculated Value** - Specifies whether the attribute value is calculated automatically.
  - **Multiple Values Possible** - Specifies whether the attribute can have more than one value.
  - **Leading Value** - Specifies whether the attribute value will be used in the calculation.
  - **Skip in Attribute Search** - Specifies that the attribute will be omitted when searching for an item/variant with the same attributes.
  - **Value Description** - Specifies a description of the selected value.
  - **Unit** - Specifies the value unit.
  - **Value Type Code** - Specifies the type code for the attribute value.
  - **Value Type Description** - Specifies a description of the value type.
- The **Configuration** FastTab contains fields related to settings that enable or disable automation in the Advanced Product Configurator for the configuration.
  - **Skip Auto No.** - Specifies whether to skip the automatic creation of the item number.
  - **Skip Auto Base UOM** - Specifies whether to skip the automatic creation of primary and secondary units of measure.
  - **Skip Auto Description** - Specifies whether to skip the automatic creation of the item description.
  - **Skip automatic BOM** - Specifies whether the automatic creation of a production or assembly BOM is to be skipped.
  - **Skip Auto Sales Price Calculation** - Specifies whether to skip the automatic creation of sales prices for the item.
  - **Skip Auto Purchase Price Calculation** - Specifies whether to skip the automatic creation of purchase prices for the item.
  - **Skip Auto Lead Time Formula** - Specifies whether to skip the automatic calculation of lead time formulas.
  - **Skip Auto Extended Text** - Specifies whether to skip the automatic creation of extended text for the item.
  - **Skip Auto Resource** - Specifies whether to skip the automatic creation of resource lines in the assembly BOM.
  - **Skip Auto Routing Creation** - Specifies whether to skip the automatic routing lines creation.
  - **Use Custom Routing No.** - Specifies whether to use the routing custom number.
  - **Show Item After Creation** - Specifies whether the new item card will be displayed after the item is created.

The following are the steps to run the configuration that you created.

## Entering Configuration Attribute Values

1. Make sure that the **Configuration Type** field is completed on the **General** FastTab.
2. Enter the attribute values for the new product on the **Attributes, Attribute Value Code** FastTab.
  - You can select an attribute value from the available list of values (if defined in the configuration type) by clicking the assist button in the **Attribute Value Code** field.
  - If no values are defined, you must enter the content in the **Attribute Value Code** field manually.
  - Follow the prompts if you select incorrect values.

### TIP

Some attributes can have more than one value. In this case, additional attribute values can be populated by selecting the **Manage / Add Multiple Value** action on the **Attributes** FastTab. After running the action, the system will add another line of attribute values, where you will be able to complete another attribute value.

### CAUTION

If multiple values are selected for a single attribute, only one value is used in the calculation of item elements. This value is marked as the **Leading Value**. To change the automatically selected (based on configuration type settings) leading value, use the **Manage / Set Value as Leading Value** action on the **Attributes** FastTab.

## Testing Configuration

1. On the **Configuration Card** select the **Manage / Test Configuration** action to test the configuration.
2. Advanced Product Configurator verifies that all required attribute values have been populated and automatically starts item elements creation functions such as description, translations, extended descriptions, BOM according to the configuration type settings and the settings on the **Configuration** FastTab.
3. If there are errors that prevent the further processing, check the errors in the **Errors** information window and follow the messages to eliminate errors (e.g. change attribute values) and run the **Manage / Test Configuration** action again.
4. If the configuration is tested and you can proceed to the next step, the **Tested** field on the **General** FastTab will be enabled automatically.

## Verifying Configuration

If testing was completed successfully, you can check if configuration output is correct. This process step is not mandatory, but is recommended during the initial startup period of a configuration type or when testing settings for a given configuration type.

1. Verify that the automatically generated field values in the **General** configuration FastTab match the expected values:
2. Check, if product elements such as BOM, sales prices, purchase prices, routing, extended texts etc. are correct. The items are available when you select the **Navigate** action.

### TIP

If you enable skipping auto creation of selected item elements on the **Configuration** FastTab, you can manually add them now.

## Running Configuration

1. To run the configuration and create the configuration output according to the settings of the **Configuration Type** tab, select the **Run Configuration** action from the **Manage** tab.
2. Advanced Product Configurator automatically creates a configuration output and updates the related sales line (if the configuration was created from a sales line).

# BOM Structure Preview

Advanced Product Configurator enables the user to preview the BOM structure of a configuration type or tested configuration. The BOM structure is visualized by using indentations and tabs, BOM levels, components defined in BOM lines (items, configuration types and other BOMs) or information about an added routing. The functionality is used the same way as the standard **Structure** action on the item card.

To view the BOM structure, after testing the configuration, choose the **BOM Structure** action from the **BOM** tab on the configuration or the configuration type card.

## See Also

[Configuration Type BOM Template Setup](#)


[Setting up Components of a Configuration Type BOM Template](#)

[Static Routing Setup](#)

# 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

[Working with Advanced Product Configurator](#)



# Created Card Administration


Advanced Product 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**

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 with Advanced Product Configurator](#)

# 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 "Cumulative 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

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](#)

[Advanced Product Configurator App on AppSource](#)

[IT.integro 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 \(Modern Policy\)](#)