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Terminology

The *Product Configurator* is a generic Configurator that enables you to setup questionnaires for complex item combinations. The system will then be able to suggest the correct item combination for a sales order or production order.

Sales Configurator

The *Sales Configurator* will create sales quote or order lines as a result of the configuration. It will not create production orders. It is still possible to create MTO Project Production Orders using the normal planning function on the sales order. Please refer to the Microsoft Dynamics NAV Online Manual for instructions on how to use this function. The Configurator is available on both Sales Quotes and Sales Orders. If a Sales Order is created from a Sales Quote and there is a saved configuration for the Sales Quote the configuration is also moved to the new order.

A new optional feature has been added to the Sales Configurator that will attempt to create a new Production or Kit BOM based on the answers given. Depending on the settings, if an existing BOM and Item with the same configuration are found, then they may be used, or a new BOM and Item may be created. If a new Item is created, additional setup of the new item will need to be done.

Production Configurator

The *Production Configurator* will create a production order from a line in the sales order. You will have several choices when creating the production order (planned, firm-planned or released).

It is possible to create production orders from each line in the sales order.

Kitting Configurator (NAV 5.0 and later only)

The *Kitting Configurator* will create a custom kitting order from a line in the sales order or sales quote. The Kitting Configurator is only available in the North American NAV 5.00 and later versions.

Questionnaires

All Configurators are based on questionnaires. The questionnaires contain several questions and also the possible answers for each question.

The questions also have different levels to determine when they should be asked. Questions can have unique or several answers.

Triggers

A trigger determines if something should happen, based on answers already given. It is possible to set up complex triggers using Boolean (logical) expressions.

Triggers are built using two levels:

- Trigger level - This level indicates the Boolean function between the underlying trigger lines.
- Trigger Line level - This level identifies the conditions on which a question should be asked.

There are four kinds of triggers:

- Question Triggers that will determine if a question should be asked.
- Answer Triggers that will determine if a possible answer should be suggested.
- Item Triggers that will determine the correct product combination depending on the answers already given.
- Routing Trigger that will determine the correct routings needed depending on answers already given.

Installing the system

The following installation assumes installation into Dynamics NAV 2009.

To install the system you will need to do the following:

- Import the appropriate .fob file for your version of Dynamics NAV 2009 Classic Client. If you are importing into a customized version of NAV you may want to skip some of the objects and merge the changes yourself to those objects.
- From *Administration – Application Setup – Configurator – SimCrest License List*, click *License, Import License*
- Browse to the file and click *Open* to load the license file
- Once the license has been loaded it will need to be validated
- From the SimCrest License List, click *License, Validate License*

Installation of Demo data

If you are installing the Configurator in order to demonstrate the product please follow these instructions:

1. From the Classic Client format, Go to the Designer (Shift+F12)
2. Select the menu Dataport
3. Find Dataport 14020360 Import Configurator Demo Data and run it
4. Browse to the file ConfigDemo.txt
5. Click OK

The demo data will be imported.

For security reasons the Dataport has been developed to only allow import into a demonstration company (CRONUS company only).

Setting up the system

Navision Granule Dependencies

All Configurators are set up exactly the same way. What separates them are the Navision granules needed to use one or another or all of them.

- **Sales Configurator** – Sales Order Management
- **Kitting Configurator** – Kitting Functionality
- **Production Configurator** - Sales Order Management, Production Orders, Production Bill of Materials, Basic Inventory

Configurator Setup

In Dynamic NAV 2009 RTC version you will access the Questionnaire from the Configurator Setup form from Departments, Administration, and then Application Setup menu.

Configurator

Administration
Configurator Setup
SimCrest License List

Edit - Configurator Setup

Actions

Configurator Setup

General

Early Close Action: Prompt Save Configuration:

Sales

Create BOM From Sales Config: Prompt Default Production Item No.: 1000
Default Item\BOM Nos: ITEM6 Default Kitting Item No.: 1964-W
Duplicate Item\BOM Option: Prompt Sales Default Price: Question

Production

Save TEMP Production BOM: Production Default Price: Question
Save TEMP Production Routing:

Kitting

Save TEMP Kit BOM: Kitting Default Price: Question

OK

The configurator setup enables you to specify the look and the way the configurator works. There are four fast tabs on the setup card, General, Sales, Production, and Kitting, each relating to the type of configuration that is being setup.

General Fast Tab

The general tab is where you set up how the configurator will be displayed in NAV.

Field	Description
Early Close Action	<p>Allows you to specify what kind of action the Configurator should take if you select to cancel a configuration early</p> <p>Prompt – prompts you if you want to save what has been answered so far.</p> <p>Always Save – will not prompt you, it will automatically save what has been answered so far.</p> <p>Never Save –will not prompt you, it will not save what has been answered.</p>
Save Configuration	<p>Allows you to save the configuration for the sales document at the end of the configuration. Any saved configuration is loaded upon a new start of the configurator.</p>

Sales Fast Tab

This tab is setting up the Sales type configuration. There is new functionality on the *Sales Configurator* that allows new items to be created with the new corresponding Kit BOM or Production BOM.

Field	Description
Create BOM from Sales Configuration	<p>No – Original Sales Configurator. Will display each answer as an individual sales lines</p> <p>Production BOM – Will create a Production BOM and new Item No. based on each answer. Must have manufacturing granule.</p> <p>Kit BOM - Will create a Kit BOM and new Item No. based on each answer. Must have Kitting granule.</p> <p>Prompt – Will ask you which configuration you would like to create</p>
Default Item\BOM Nos	<p>Define a number series for the item/BOM and associate the number series code here.</p>

Field	Description
Duplicate Item\BOM Option	<p>Prompt – Will ask you which, of the 3 below, options you want to create.</p> <p>Use Existing Item and Existing BOM – this option checks if an existing item and BOM matches the answers given and uses that information to enter on the sales line.</p> <p>Create New Item with Existing BOM - this option checks if an existing BOM matches the answers given and creates a new item but associates the existing BOM to the new item and enters the new item on the sales line. This will require additional setup to the new item.</p> <p>Create New Item and Create New BOM - this option always creates a new item and a new BOM regardless if an existing BOM may match and associates the new BOM to the new item, and then enters the new item on the sales line. This will require additional setup to the new item and BOM.</p>
Default Production Item No.	This item will be used as the template for the new Production BOM based item. All the fields are copied over to the new item except for the Description, Search Description, Unit Cost and Production BOM No.
Default Kitting Item No.	This item will be used as the template for the new Kitting BOM based item. All the fields are copied over to the new item except for the Unit Cost and Kitting BOM No.

Production Fast Tab

This tab offers additional options in the set up the production type configuration.

Field	Description
Save TEMP Production BOM	This option saves the Temporary production BOM created by the Production configurator. This allows for users to review the production BOM that was created through the configurator.
Save TEMP Production Routing	This option saves the Temporary production Routing created by the Production configurator. This allows for users to review the production Routing that was created through the configurator.
Production Default Price	<p>Sets where the unit price on the sales order populates from.</p> <p>Question – will pull from the questionnaire Item – will pull from the item card</p>

Kitting Fast Tab

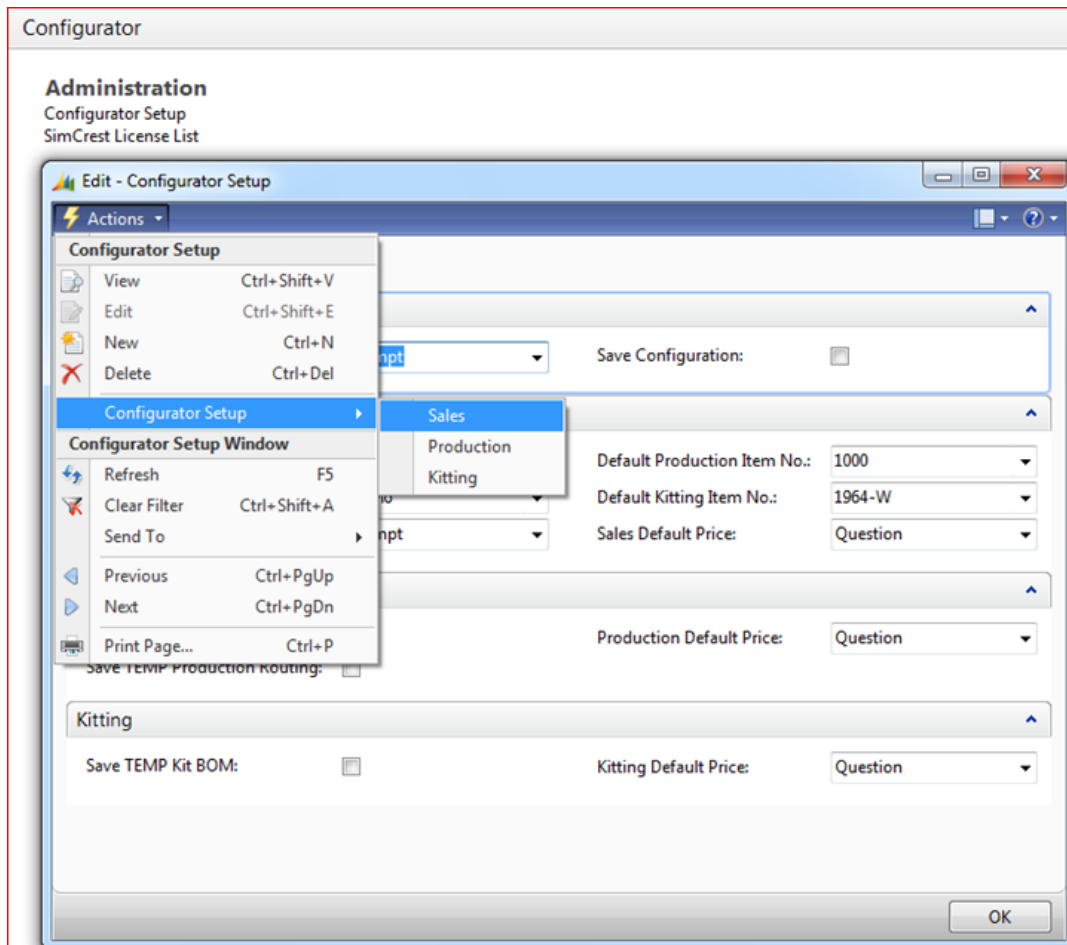
This tab offers additional options in the set up the kitting type configuration.

Field	Description
Save TEMP Kit BOM	This option saves the kit BOM created by the Kitting configurator to help understand how the kit BOM is created through the configurator. The sales kit lines show the added lines without this option being checked.
Kitting Default Price	Sets where the unit price on the sales order populates from. Question – will pull from the questionnaire Item – will pull from the item card

Questionnaires

In Dynamic NAV version 2009 you will access the Questionnaire from the Configuration Setup form from Departments, Administration, and then Application Setup menu.

To access the questionnaires, from the Configurator Setup window, click Actions, Configurator Setup.



Levels

After setting up all questions and the possible answers you will have to assign a level to each question so the system will know in what order to ask the questions.

In the figure below you will see a list of questions listed in order of the level. As you can see two questions have the same level. In this case triggers will determine which one would be asked.

From there, a list of questions will be presented by each environment.

To view the card, click on the actions icon, then card.

The Question Card

The Question Card is the base of the questionnaire. Here you will define the question you want to present to the user.

Below is a description of the different fields used in the question card:

General Fast Tab

Field	Description
Code	Enter a unique code. The sales Configurator and the production Configurator can use the same code without interference.
Description, Description 2	This is the question the system will ask the user. If both are filled out the combined text will be the question.
Level	The level is used to determine when the question should be asked and is an integer. It is allowed to have negative values. The question with lowest value will be asked first (usually 0).
Unique Answer	If checked only one answer is allowed. If not checked several answers will be allowed.

Field	Description
Multiple Answer	If checked the question allows No Answer to be selected. By checking this field the system will uncheck Unique Answer (if checked)
Text Answer Only	If checked the system will ask for text that will be placed on the sales order line. Any possible answers and items will be ignored.

Production/Kitting Fast Tab

Field	Description
Schedule Direction	This refers to how you want the production order dates to be scheduled. Backwards – will schedule from the requested or document date backwards so that it will finish on the proper date. Forwards – will schedule forward from the requested or document date to finish when the routing times are completed.
Use Standard Routing	Used for the <i>Production Configurator</i> only. This is used to tell the system to use default routing associated with the item being configured. It only needs to be checked on the question with the lowest level (other levels are ignored). If checked, default routing is loaded and additional routes are added through the Answer Routing Lines and Triggers
Load Default BOM	Used for the <i>Production and Kitting Configurator</i> only. This is used to load the Production or Kitting BOM for the item. All items on the Production or Kitting BOM will be loaded and priced. Usually this is done on the very first question but it can be done anywhere during the question process. Any possible answers will be ignored.
Item Configuration Subform Item Nos.	Used for the <i>Production Configurator</i> only. This is to list what Item No.s this question should be asked for. This enables you to set up different questionnaires for the different items.

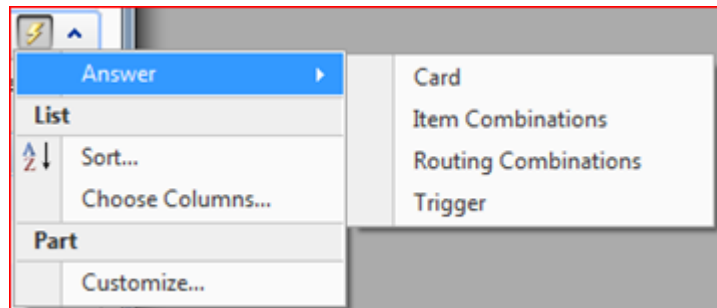
Possible Answer Subform Fast Tab

Field	Description
Code (on lines)	This is the code for the possible answer. The code must be unique to the question.
Description (on lines)	This is the possible answer that the user will see in the questionnaire.
Description 2 (on lines)	Not shown, but it is possible to add a second description
Default	A check mark in this field denotes this is the most common answer and when the question is asked this answer will have a check mark associated with it.
No Quantity	Quantity not applicable (will ignore all Qty's above)
Default Quantity	This is the default quantity suggested in the questionnaire
Min Qty	This is the minimum quantity allowed for this answer
Max Qty	This is the maximum quantity allowed for this answer

Quantities are only necessary when there are Answer Item Lines under the answer. The system will accept any quantity if both *Min Qty* and *Max Qty* are 0 (zero).

The Answer Card

From each answer line it is possible to access the answer card.



Answer Combination

For each answer a number of Item or Routing Combinations can be set up. An *Item/Routing Combination* is a

combination of items/routings that should be entered into the sales lines/component/routing lines as a result of the configuration.

Answer Combinations ▾				Type to filter	Type ▾
Sorting: Environment, Question Code, Answer Code, Code, Type ▾				Filter: Manufacturing • STYLE • BLACK	
Type	Code	Description			
Item	1	Combination 1			
Routing	1	Combination			

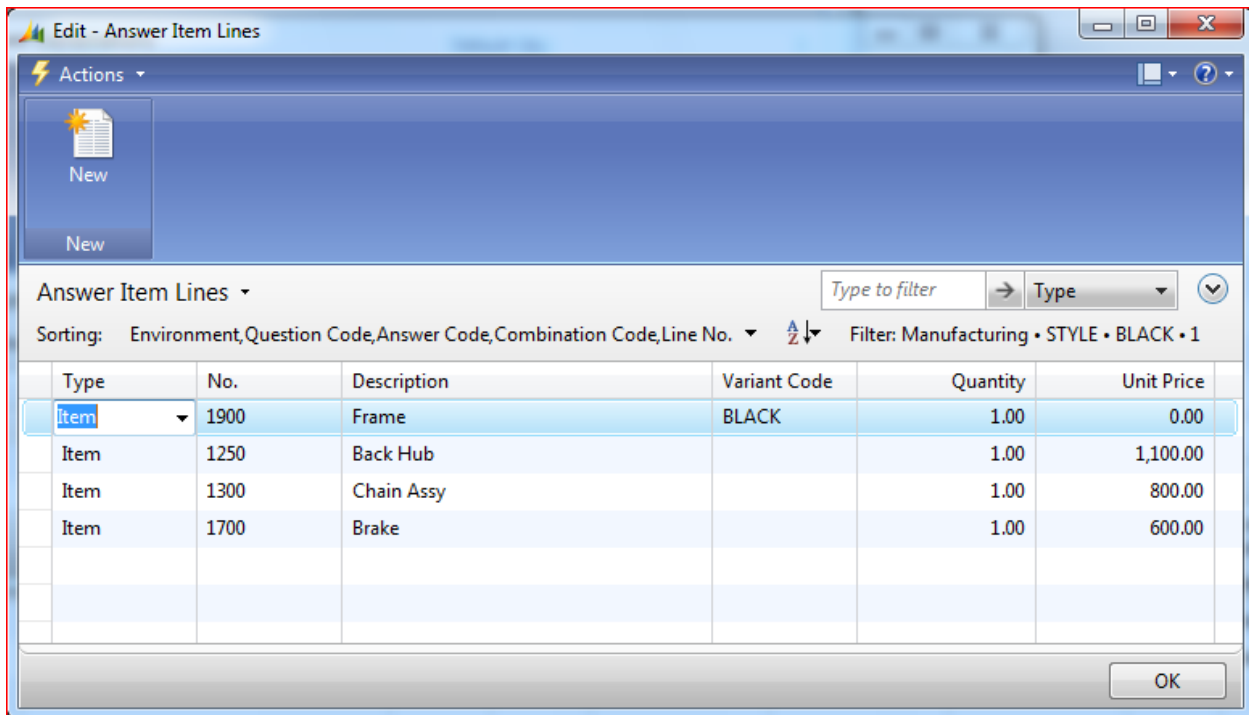
Several combinations can be entered and a trigger for each combination will determine which combination the Configurator will use.

For each combination a trigger should be set up (see later how to do this) to determine if the combination should be used. You should also enter the item combination for each code.

Answer Item Lines

For each Answer Combination, answer item lines need to be filled in. The items that are listed here will be the items given to the answer in the configurator.

From the Answer Combination line, click on the action icon then lines



The following fields are available for the Answer Item Line:

Field	Description
Type	You will have a choice of: <ul style="list-style-type: none"> • Blank: The text only will transfer to the order (only sales) • Item: Select item • Resource: Select resource (only sales)
No.	The number of the Item or Resource (use lookup)
Description	Description will default in from the item/resource card. If the type was blank enter in the comment you want shown on the sales configurator.

Field	Description
Variant Code	Select Item Variant Code
Quantity	Select the quantity
Unit Price	Specify the unit price

The resulting quantity on the sales- or production order will be the above quantity multiplied by the answered quantity.

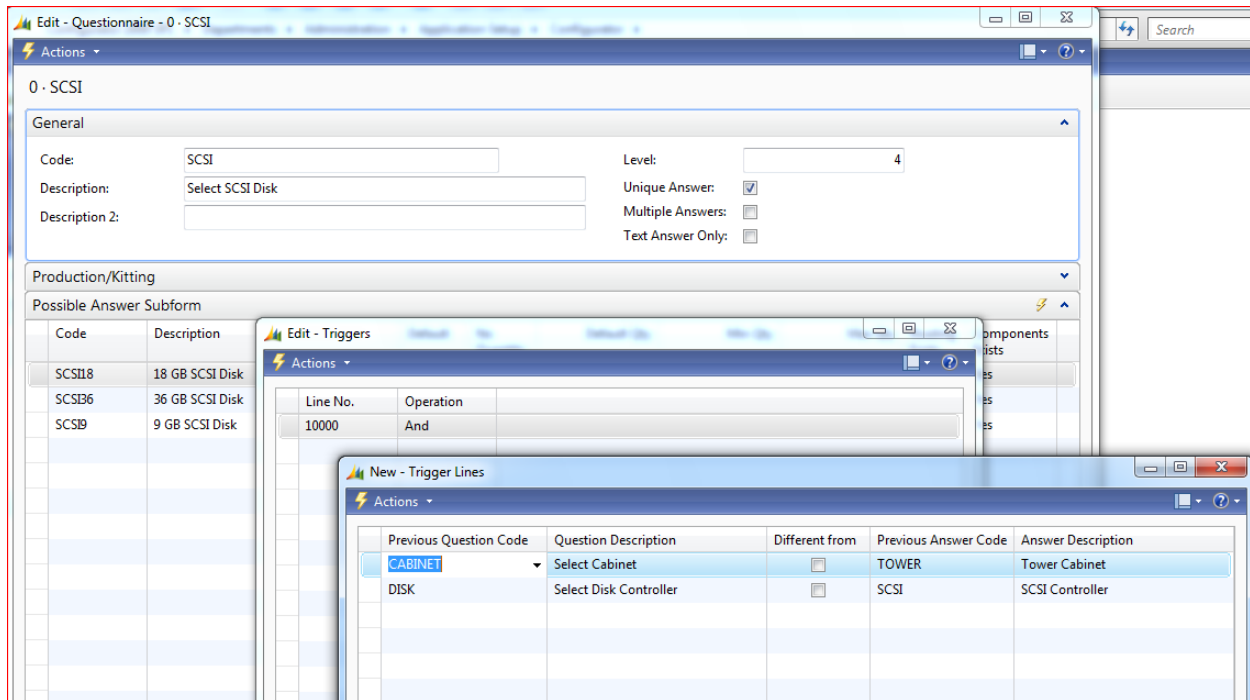
Answer Routing Line

The Answer Routing Lines contain the exact same fields as a normal routing line. Refer to Navision’s documentation for information on these fields.

Type	No.	Description	Setup Time	Run Time	Wait Time
Work Center	300	Painting department	10	5	1
Work Center	100	Assembly department	10	10	1

Question Triggers

Question triggers are used to determine if a question should be asked. From the question card click on the action icon, Question, Triggers.



Fields available on Question Triggers:

Field	Description
Operation	<p>You have the choice of AND or OR. The AND operation requires that all attached trigger lines will be true. The OR operation will require that at least one trigger line will be true.</p> <p>IMPORTANT: Please make sure that the AND or the OR is written to the record before going to Trigger Lines (the line number needs to be greater than 0).</p>

The question triggers contains one or more Boolean operations (one for each line). From the Operation line click Trigger, Trigger Lines.

Fields available on Question Trigger Lines:

Field	Description
Previous Question Code	This is a question that should have been answered previously
Question Description	This is the question associated with the above code
Different from	Indicates a negation (NOT). Used if the answer above should be something other than the answer code.
Answer Code	Is the answer code to the above question that should trigger the overall question
Answer Description	Is the answer associated with the above answer code

Here you will enter combinations of previously asked questions and answers. In the example given later we need to select an SCSI disk. We will only allow this question to be asked if we have selected a Tower Cabinet and a SCSI controller.

If you add several operations as question triggers the Boolean operation between those will be AND.

If no triggers are defined the question will always be asked.

There are also triggers for answers and item combinations.

Refer to Appendix B for details about setting up Triggers.

See Appendix A for details about setting up levels.

Using the system

To start using the system you must set up the questionnaires (see setting up the system).

Questionnaires

When the Configurator has been started it will ask the questions according to the questionnaire.

All questions are asked in an order determined by the level field for the questions. The question will only be asked if the trigger allows it. That will depend on previous answers. If a question does not have any triggers it will always be asked.

You will now be able to select the answers by checking the correct answer in the selected column. You are also able to enter the quantity.

You can use the scroll bar in the Configuration Summary to view answers that do not fit in the window.

The screenshot shows the 'Edit - Configurator' window. At the top, there is an 'Actions' menu and a 'Question' field containing 'Select RAM'. Below this is a table of 'Answers' with the following data:

Description	Price	Quantity	Selected
128 MB RAM	185.00	1	<input type="checkbox"/>
256 MB RAM	0.00	1	<input checked="" type="checkbox"/>
384 MB RAM	195.00	2	<input checked="" type="checkbox"/>
512 MB RAM	315.00	1	<input type="checkbox"/>
64 MB RAM	85.00	1	<input type="checkbox"/>

Below the table, the 'Total' is shown as 528.00. At the bottom of the window, there are 'Back', 'Next', 'Finish', and 'Close' buttons.

The 'Configurator Result Subform' table shows the current configuration:

Question	Answer	Quantity	Price
Select Cabinet	Desktop Cabinet	0	0.00
Select Processor	Pentium III 733 MHz	1	138.00
Select RAM	256 MB RAM	1	0.00
Select RAM	384 MB RAM	2	390.00

Depending on the setup of the questionnaire the system may allow you to select none, one or several answers.

You will not be allowed to click the 'Next' button until the question has been answered properly.

You will always be allowed to click the 'Back' button which will take you to the previous question (unless standing on the very first question).

If you 'Cancel' the configuration you will be able to save the current configuration to enable you to go back and continue the configuration another time (depending on the setup parameters).

Configuration result

At all times during the configuration you will be able to see the result in the 'Configuration Summary' window. After configuration is completed, you can click *Finish* to accept the configuration. If you click *Back* you will be going back into the Configurator to adjust the configuration. By clicking *Cancel* you will cancel the configuration; however, you will be able to save the current configuration to resume at a later time (depending on the setup parameters).

Sales Configurator

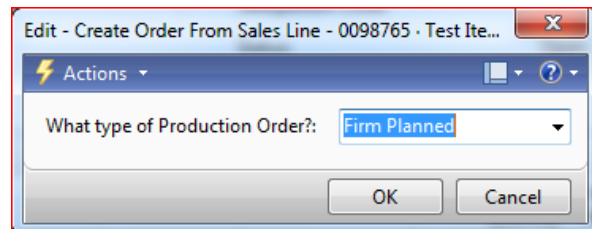
To use the *Sales Configurator* create a new sales order or sales quote. You can add lines to the order before and/or after the Configurator runs. You will also be allowed to make changes to the configured result. The *Sales Configurator* must be launched from a blank line.

Select *Action icon – Function – Configurator – Sales* to start the *Sales Configurator*.

When the Configurator has finished the sales document will be populated with the lines according to the set up of the Configurator. Depending on the setup the configuration will be saved and starting the Configurator again will show the current configuration again (last question is being asked). From here you will be able to change the configuration and populate the sales document again. You will need to clear the result of a configuration (delete the lines on the sales document) before accepting a new configuration.

Production Configurator

To use the *Production Configurator* create a new sales order. You must add the item and quantity that should be configured in a sales line. From this sales line select *Action Icon – Function – Configurator – Production* to start the *Production Configurator*. The system will ask what kind of production order you would like to create. The configuration process is based on a quantity of one regardless of the quantity entered on the sales line.



When the Configurator has finished the system will have created a production order with the configured item according to the set up of the Configurator.

Depending on the setup, the configuration will be saved and starting the Configurator again will show the current configuration again (last question is being asked). From here you will be able to change the configuration and update the production order accordingly.

Kitting Configurator (NAV 5.0 only)

To use the *Kitting Configurator* create a new sales order. You must add the item and quantity that should be configured in a sales line. From this sales line select *Action Icon – Function – Configurator – Kitting* to start the *Kitting Configurator*. The configuration process is based on a quantity of one regardless of the quantity entered on the sales line.

When the Configurator has finished, the system will have created a Kit Sales Line of the configured items according to the set up of the Configurator.

Depending on the setup, the configuration will be saved and starting the Configurator again will show the current configuration again (last question is being asked). From here you will be able to change the configuration and update the production order accordingly.

Setting up demo data

In order to demonstrate the capabilities of the Configurator a backup of the Cronus Company has been included.

The demo data contains three Configurators:

- A *Sales Configurator* that configures a simple PC system.
- A *Production Configurator* that configures a simple Bicycle
- A *Kitting Configurator* (NAV 5.0 and later only) that configures simple furniture

Sales Configurator comments:

- Several RAM modules can be selected. It is OK not to select any RAM modules
- If IDE disk controller is selected only IDE disks can be selected afterwards
 - If Tower Cabinet, Pentium III 866 MHz, 256 MB RAM, and IDE controller is selected answers only show
 - 10.2 GB IDE Disk (due to Answer line trigger)
 - 20.4 GB IDE Disk (no triggers so answer will always show)
 - 40 GB IDE Disk (due to Answer Trigger)
- If SCSI disk controller is selected only SCSI disks can be selected afterwards
- Graphics Card GRAPH2 has Answer Trigger lines
 - Answer Combination 1 will be used if the Desktop Cabinet is chosen
 - Answer Combination 2 will be used if the Tower Cabinet is chosen
- ZIP Disk Packs can only be selected if you select a ZIP Drive
- Several ZIP Disk Packs can be selected. No Selection is also allowed

Production and Kitting Configurator comments:

- No triggers have been defined

Appendix A: Using Levels in Questionnaires

This appendix is to help set up the correct levels for the questions in the questionnaires.

Questions are asked in an order determined by the level. This means that the first level will be asked first. If two questions share the same level a trigger should determine which one should be asked and which one should not. If this is not the case both questions will be asked in the order of the Question code.

Negative levels are allowed. Typically the first question would be level 0 or 1. You will not have to assign levels in increments of 1. You can skip numbers in levels. For instance the first level could be 0, the next level be 10 etc.

The configuration will be sorted according to the level. The same goes for the order of the items put on the sales order or production order.

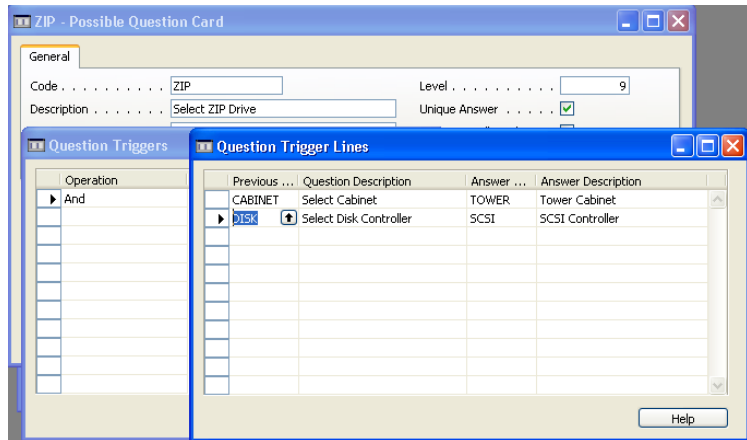
Appendix B: Triggers

Triggers are used to determine, for instance, if a question should be asked or not. The Triggers make this determination based on the answers to previously answered questions.

Let's have a look at an example of a trigger.

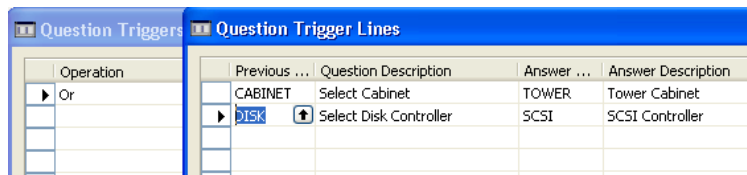
This trigger will ask to select a ZIP drive only if:

- We previously selected a Tower Cabinet and
- We previously selected a SCSI controller



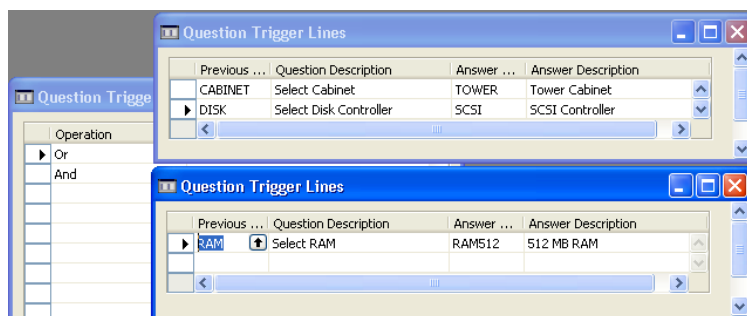
The Operation denotes an AND operation, so both conditions must be true.

In the next example we have just changed the Operation to OR so that just one of the previously asked questions must be selected.



You can add additional Operations and attach trigger lines to those operations also. The logical operator between two or more operations is always AND.

In the last example there are two operations, one OR and one AND.



The trigger will evaluate to the following logical expression:

((Cabinet=Tower) OR (Disk=SCSI)) AND (RAM=512MB).

In normal human language this means that if the cabinet equals Tower or the disk controller is an SCSI controller the question will be asked if the RAM also is 512 MB.

There are also triggers to determine if an answer should be available and triggers for item combinations. They are set up in a similar fashion.

A note on entering Triggers

When entering a trigger you have to enter an AND or OR operation. When doing so please make sure that the Asterisk (*) next to the operation is not present when entering trigger lines. If it is the trigger lines are not taken into consideration. To make the asterisk disappear select the OR operation and hit Enter. If necessary go back to the AND operation. This will clear the asterisk.

Appendix C: Objects in Configurator

This is a list of all the objects included in the Configurator (including modified standard objects).

Type	ID	Name	Version List
Table	27	Item	NAVW16.00.01,KITNA6.00.01,NAVNA4.00.01,SimConfig 5.00
Table	36	Sales Header	NAVW16.00.01,KITNA6.00,NAVNA6.00,SimConfig 2010 R3 NAVW16.00.01,KITNA6.00.01,NAVNA5.00.01,SimConfig 2010 R3
Table	37	Sales Line	2010 R3
Table	60000	SimLicense Setup	SimLicense Mgr
Table	60001	SimLicense End User	SimLicense Mgr
Table	60002	SimLicense Product	SimLicense Mgr
Table	60003	SimLicense Product Version	SimLicense Mgr
Table	60004	SimLicense Product Feature	SimLicense Mgr
Table	60005	SimLicense	SimLicense Mgr
Table	60006	SimLicense Lic. Prod. Feature	SimLicense Mgr
Table	60007	SimLicense Lic. Custom Key	SimLicense Mgr
Table	14020360	Possible Question	SimConfig 2010
Table	14020361	Possible Answer	SimConfig 5.00
Table	14020362	Trigger	SimConfig 5.00
Table	14020363	Trigger Line	SimConfig 5.00
Table	14020364	Answer Item Line	SimConfig 5.00
Table	14020365	Result	SimConfig 5.00
Table	14020366	Answer	SimConfig 5.00
Table	14020367	Answer Routing Line	SimConfig 5.00
Table	14020368	Answer Combination	SimConfig 5.00
Table	14020369	Configurator Setup	SimConfig 2010
Table	14020370	Item Configuration	SimConfig 5.00
Table	37053500	SimCrest License	SimLicense 2010
Table	37053501	SimCrest License Features	SimLicense 2010
Table	37053502	SimCrest License Custom Keys	SimLicense 2010
Table	37053503	SimCrest License User	SimLicense 2010
Table	99000771	Production BOM Header	NAVW16.00.01,KITNA6.00,SimConfig 2010 R3
Form	30	Item Card	NAVW16.00.01,KITNA6.00,NAVNA4.00,SimConfig 5.00
Form	41	Sales Quote	NAVW16.00.01,KITNA6.00,NAVNA4.00,SimConfig 2010 R3 NAVW16.00.01,KITNA6.00,NAVNA5.00.01,SimConfig 2010 R3
Form	42	Sales Order	R3
Form	46	Sales Order Subform	NAVW16.00.01,KITNA6.00,NAVNA4.00,SimConfig 2010 R3
Form	95	Sales Quote Subform	NAVW16.00.01,KITNA6.00,NAVNA4.00,SimConfig 2010 R3
Form	60000	SimLicense Setup	SimLicense Mgr
Form	60001	SimLicense End User List	SimLicense Mgr
Form	60002	SimLicense Products	SimLicense Mgr
Form	60003	SimLicense Product Versions	SimLicense Mgr

Type	ID	Name	Version List
Form	60004	SimLicense Product Features	SimLicense Mgr
Form	60005	SimLicense	SimLicense Mgr
Form	60006	SimLicense Subform Features	SimLicense Mgr
Form	60007	SimLicense Subform Custom Keys	SimLicense Mgr
Form	60008	SimLicense List	SimLicense Mgr
Form	60009	Date Picker	SimLicense Mgr
Form	14020360	Questionnaire	SimConfig 2010
Form	14020361	Possible Question List	SimConfig 5.00
Form	14020362	Possible Answer Subform	SimConfig 5.00
Form	14020363	Triggers	SimConfig 2010
Form	14020364	Possible Answer Card	SimConfig 5.00
Form	14020365	Answer Item Lines	SimConfig 5.00
Form	14020366	Possible Answer List	SimConfig 5.00
Form	14020367	Trigger Lines	SimConfig 5.00
Form	14020368	Create Order From Sales Line	SimConfig 5.00
Form	14020369	Answer Routing Lines	SimConfig 5.00
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