

OptiProERP Product
Configurator User Guide
All Countries

User Guide

OptiProERP 1.2.9 with SAP Business One 9.3 Document Version 1.2.9 - 2019-07-08

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1. The Application

The **OptiProERP Product Configurator** is an application for creating a customized product. It enables you to make possible changes in the standard core product to develop a fully customized item as per the market/client requirement.

The application functionality allows you to create a unique item code for the customized product, generate final string, followed by selection of bill of materials (BOM) along with price list, add routing (an optional functionality) to let you run the wizard at end and generate sales price/ quotation.

With the help of the **OptiProERP Product Configurator** you can easily perform the following actions:

- Create a unique Item Code
- Create a Feature Code
- Create a Model Code
- Create a Feature BOM and Model BOM- ascertain the Parent and Child items associated with them
- Create unique Rule Codes
- Configure the product with the help of the Configuration Wizard; select the Customer, Ship To, Bill To address; select the Model BOM; ascertain the different selection criteria and accept the same.

Example: A mobile manufacturing company manufactures several models of mobiles with unique model names, features, along with a range of accessories. The **OptiProERP Product Configurator** allows you customize, configure to configure such products with unique item code, model name, feature and accessories and adapt to the growing industrial needs.

The OptiProERP Configurator is integrated with SAP Business One and capable of syncing data from one to another. The application imports: price list, customers, BOM, Item Master Data, warehouse, Unit Master, Item Template, Work Center Master, Operation Master and Routing Master. And, when it generates output i.e. sales price report/ quotation, it exports details to SAP Business One on screens Item Master Screen, sale Order/ Quotation, SAP Business One BOM, OptiPro BOM and Routing Entry.

1.1 Who Should Read This Document?

This document is intended for team members who are using OptiPro Product Configurator, learning its use, or training others to understand or make understand basic concepts used in the individual screens designed in the software application.



2. Import of Data from SAP Business One

The OptiProERP Configurator is capable of integrating data from SAP Business One. To do so you need to run data collection utility. Following screens are used to import data from SAP Business One to the **Configurator:**

- 1. Data Collection
- 2. Item Master Data

2.1 Data Collection

The data collection screen allows you to collect data from SAP Business One in selected areas to OptiProERP Configurator.

To access the screen, go to Administration> Setup> OptiPro> Configurator Data Collection.

The Data Collection screen comprises of the following entities:

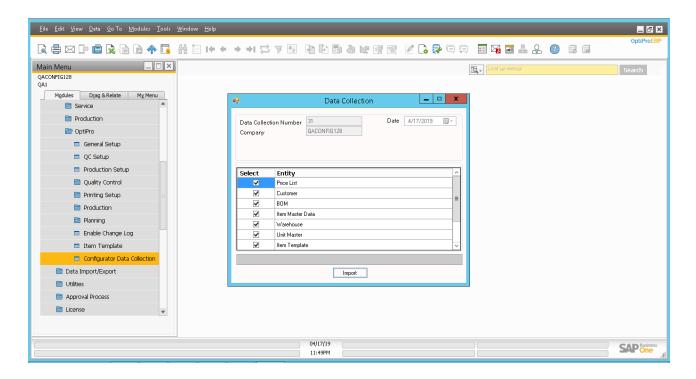
- Price List
- Customer
- BOM
- Item Master Data
- Resource Master
- Warehouse
- Exchange Rates
- Unit Master
- Item Template.
- Routing
- Work Center Master
- Operation Master
- Routing Master

On selecting the respective check boxes the related data gets imported to the Configurator.

2.1.1 Procedure

- 1. On the **Data Collection** screen, select the respective checkboxes available in the **Select** column.
- 2. Click the **Import** button.

Result: The data gets imported to the configurator.



2.2 Item Master Data

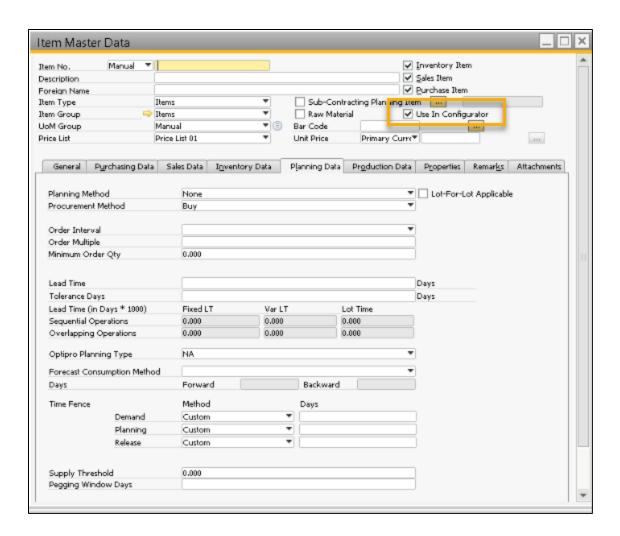
The **Item Master Data** screen in SAP Business One enables you to import the individual items from SAP Business One to the **Configurator**.

To access the screen, go to **Inventory** > **Item Master Data**.

2.2.1 Procedure

- 1. Add required details on the screen. (For more on how to add data, refer **OptiProERP Production User Guide**)
- 2. In addition to it, select the check box **Use In Configurator** available on the screen.

Result: The selected items get imported to the **Configurator**.



2.3 Item Template

An **Item Template** screen in SAP Business One is used as a basis for creation of an item in Configurator. The screen saves the templates associated with the different classes of items. You can add a code and description for the item and add the associated values to create an item template. When the data from SAP Business One gets imported to the **Configurator**, the Item Templates also gets imported. This screen is visible only when Configurator is run on the specific database.

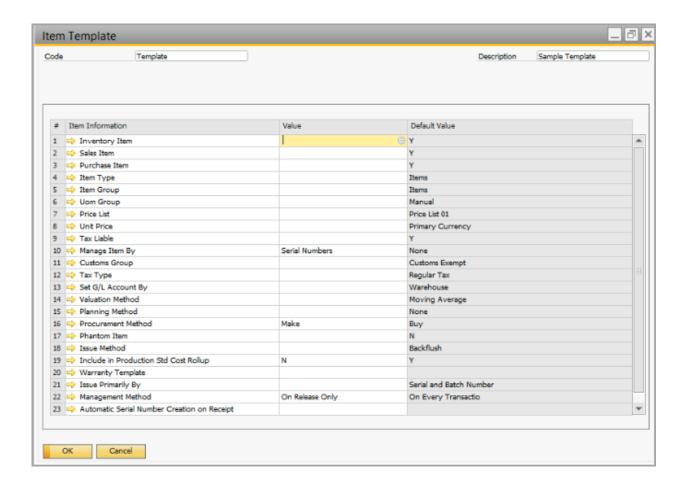
To access the screen, go to Administration > Setup > OptiPro > Item Template.

2.3.1 Procedure

- 1. On the **Item Template** screen, enter the code in the **Code** field.
- 2. Enter the description associated with the code in the **Description** field.
- 3. Enter the value which you want to be assigned as default in the Default Value field.



 Click Add button available in the bottom portion of the screen. The record will be saved. Further on import of data from SAP Business One to the Configurator, the Item Template will also be imported.



NOTE: You can also import data automatically from SAP Business One to the Configurator with the help of the Windows Task Scheduler. The Windows Task Scheduler can be programmed to run at frequent intervals of time. All the changes done for the data on SAP Business One will be automatically imported to the Configurator.

3. Import of Data from Legacy Systems

The OptiProERP allows you to migrate bulk data into Configurator with its data migration tool: **DTW (Data Transfer Workbench).** This tool directly imports data into OptiProERP using the Microsoft Excel worksheets. In Configurator, you can import data on the following screens:

- 1. Item Code Generation
- Model/ Feature Master
- 3. Feature BOM
- 4. Model BOM



5. Routing

For details on how to import data, refer OptiProERP DTW User Guide.

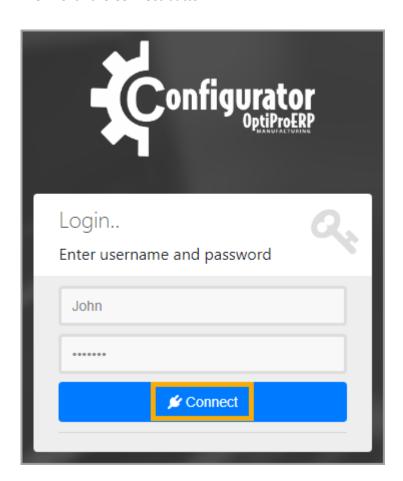
4. Login

The **OptiProERP Configurator** login screen enables you to login the application with the help of the username and password provided by the Admin.

The login credentials and rights can be assigned through *OptiProERP Admin portal*. For more on how to create login credentials and assign rights, refer *OptiProERP Admin Portal User Guide*.

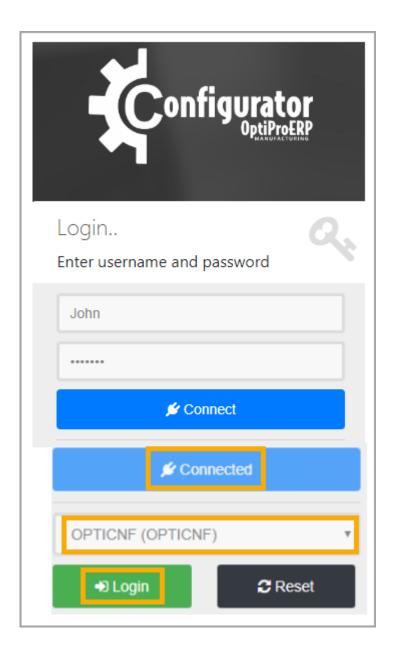
4.1 Procedure

- 1. Enter the Username in the Enter Username field.
- 2. Enter the password in the **Enter Password** field.
- 3. Click the Connect button.



- 4. On successful login, the **Connect** button changes to **Connected**.
- 5. The company databases which are available will be listed in the dropdown menu available in the screen. Select the database of your choice.
- 6. Click the **Login** button.





• Note: The Reset button enables you to clear the values entered by you in the Enter Username and the Enter Password fields.

- 7. On clicking the **Login** button, the **Configurator Home page** is displayed. The left-hand side pane on this page displays the following sub-menus:
 - Home
 - Item Code Generation
 - Feature Model
 - Feature BOM



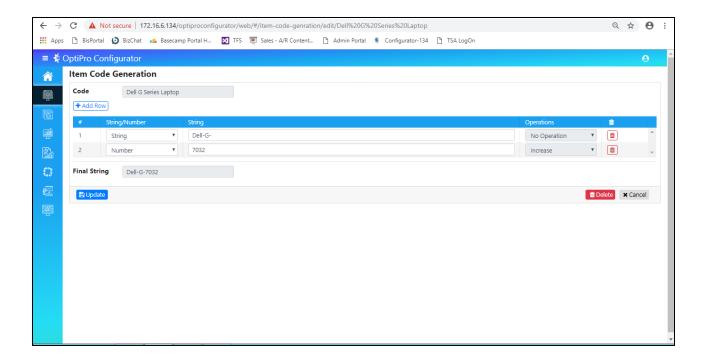
- Feature BOM
- Model BOM
- Rule Workbench
- Configuration Wizard



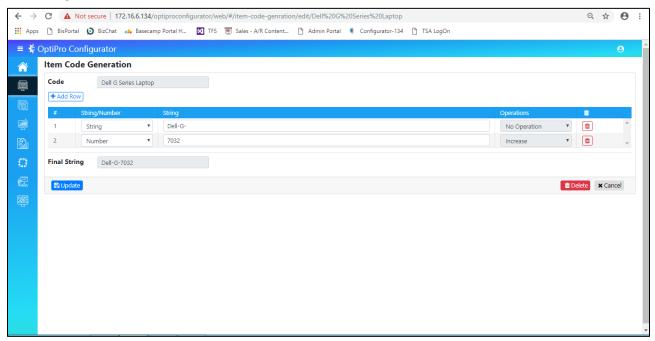
5. Item Code Generation

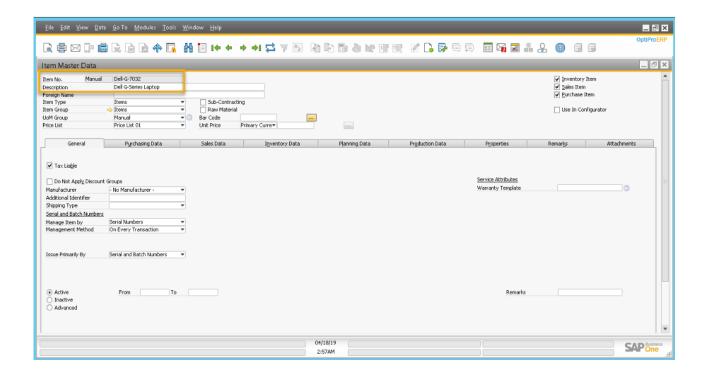
The item code generation screen allows you to generate a unique item code, associate the string/ number and select the type of operation.

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The code generated here is reflected in SAP Business One screen Item Master Data.

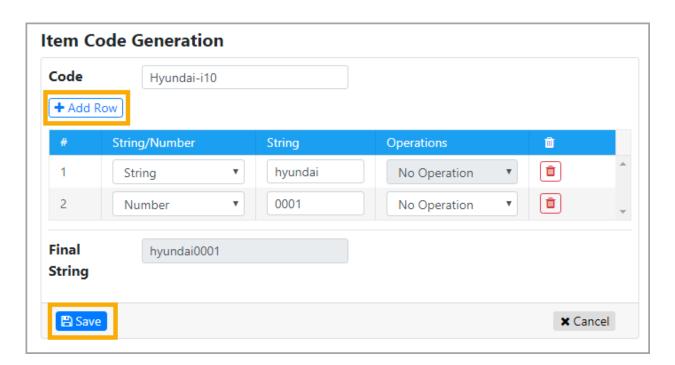




5.1 Procedure

- On the Item Code Generation screen, click Add Row button (+ Add).
- 2. On the resulting window, enter the unique code associated with the item in **Code** field. This code is associated with the **Model Master**. On creation of a new item for the **Model Master** it will follow the final string pattern which is associated with this code.
- 3. Click the Add Row button (Add Row) available in the middle of the grid. On clicking this button, the following fields will be displayed.
- Select the option as String / Number with the help of the dropdown available in the String / Number field.
- 5. Enter the string or the number in the String field based on the type of your selection in the String / Number field. If you have selected the type as String, enter the String in this field. If you have selected the type as Number, enter the number in this field.
- **6.** Select the type of operation with the help of the dropdown available in the **Operations** dropdown. On clicking this dropdown, the following options will be displayed:
- 7. **Increase:** This type of operation is applicable only for the Number type.
- **8. Decrease:** This type of operation is applicable only for the Number type.
- 9. No Operation: This type of operation is applicable for both String and Number types.
- **10.** The **Final String** field displays the item code pattern. The value in this field is generated automatically.
- 11. Click Save to save the generated pattern.
- **12.** Click **Cancel** to cancel the generated pattern.





5.1.1 Key Terms

Code: This field enables you to enter the code associated with the item. On creation of a new item for the **Model Master** it will follow the final string pattern which is associated with this code.

Add Row (+ Add Row): On clicking this button, the following fields in the bottom of the grid will be displayed.

String / Number: The following options are listed in the dropdown available in this field:

- 1. String
- 2. Number

String: This field enables you to enter either the feature name of the item or the number based on the type selected by you in the **String / Number** field.

Operations Type: The dropdown available in this field enables you to select any one of the following types of operation:

- 1 **Increase:** This type of operation is applicable only for the Number type.
- **2 Decrease:** This type of operation is applicable only for the Number type.
- 3 **No Operation:** This type of operation is applicable for both String and Number types.

Final String: The value in this field is automatically generated and displayed based on the values entered by you in the other fields.

Example: Let us consider that you are generating an Item Code for Hyundai-i10. Further you have entered the following values in the respective fields:

Code: Hyundai-i10

Row 1

String: Hyundai

Operations: No Operation.

Row 2

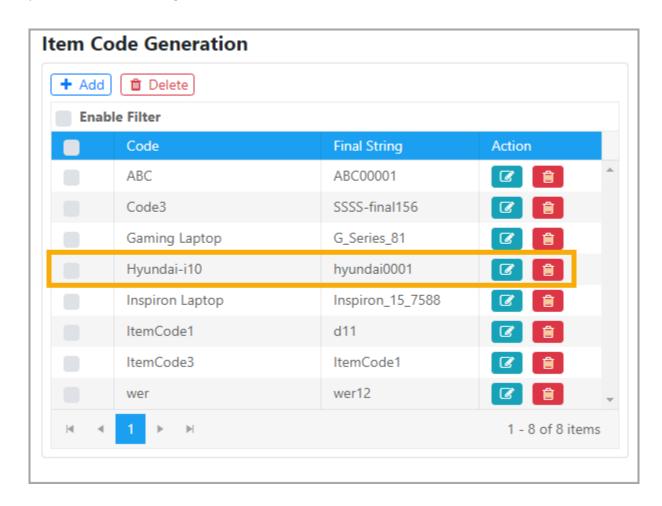
String: Number 0001 **Operations**: Increase

Final String: The final string that is generated in this field on saving the record is hyundai0001.

The Item codes which are created are **hyundai0001**, **hyundai0002**, and so on

On clicking the **Save** button, the Item Code added by you will be displayed as shown in the following screen:

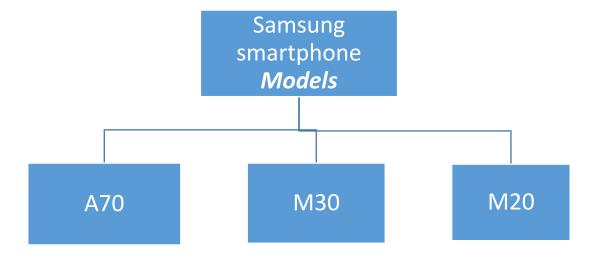




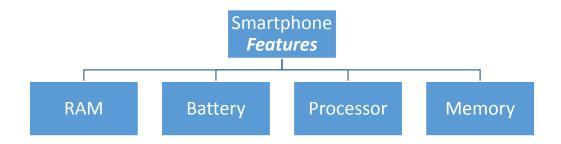
6. Model/Feature Master

Before you configure an item i.e. a model with specific features, you need to define entire set of models and features available for an item. This screen allows you to define an item's feature or model codes.

Model here refers to the variants of an item with different features. For instance, Samsung offers models like: M 30, M 20, A 70 and so on.



Feature refers to a characteristic or distinctive trait of a model like Samsung M 30 features are: RAM: 4 GB, OS: Android v8.1 (oreo), Battery: 5000 mAh etc.



The **Model/Feature Master** screen broadly comprises of the following:

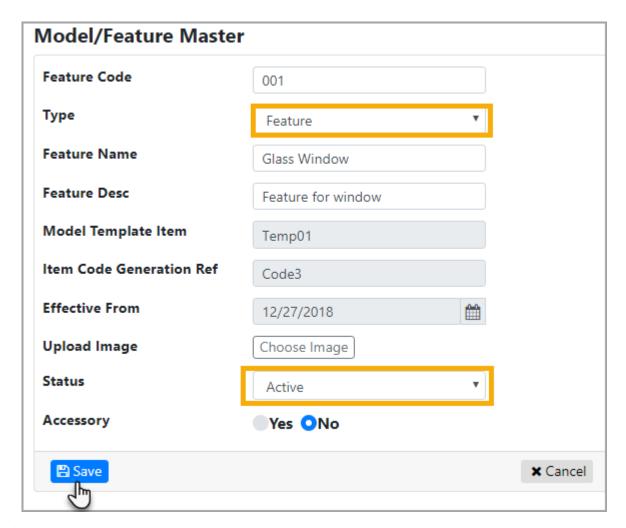
- Feature Master enables you to create a Feature Code
- Model Master enables you to create a Model code

6.1 Procedure to add the Feature Code:

- 1. On the Model / Feature Master screen, click the Add Row button (+ Add).
- 2. On the resulting window, enter feature code associated with the feature in **Feature Code** field.
- 3. Select the type as **Feature** with help of dropdown menu available near the **Type** field.
- 4. Enter name of feature in the Feature Name field.
- 5. Enter the description associated with the feature in the **Feature Desc** field.
- Select date from which you want Feature Code to become effective with the help of the Calendar icon () available near the Effective From field.
- 7. If you want to attach an image, click **Choose Image** button available near **Upload Image** field. On the resulting window, browse, locate, and select the image.
- 8. Select the status as **Active** by clicking the dropdown menu available near the **Status** field.



- 9. If you want to add any accessory for the feature, select the option as **Yes** available in the **Accessory** field. Otherwise select the option as **No**.
 - **Note**: If you have selected the option as **Yes**, you will be able to add the accessories with the help of the **Model BOM** screen.
- 10. Click the **Save** button to save the created feature.
- 11. Click the Cancel button to cancel the screen.



6.1.1 Key Terms

Feature Code: This field enables you to add the feature code for the product.

Type: The dropdown menu available near this field enables you to select the type as either **Feature** or **Model**. You need to select the type as Feature to add a **Feature Code**.

Feature Name: This field enables you to enter the name of the feature.

Feature Desc: This field enables you to enter the feature description which helps you in easily identifying the feature.

Model Template Item: This field is not applicable for Feature Master. As a result this field will be disabled.



Item Code Generation Ref: This field is not applicable for **Feature Master**. As a result this field will be disabled.

Effective From: You can select the date on which you want the **Feature Code** to become effective with the help of the Calendar icon () available near this field.

Upload Image: You can browse, locate, and upload any image with the help of the **Choose Image** button available near the **Upload Image** field.

Accessory: If you want to add any accessory for the feature, select the option as **Yes** in this field. Otherwise select the option as **No**.

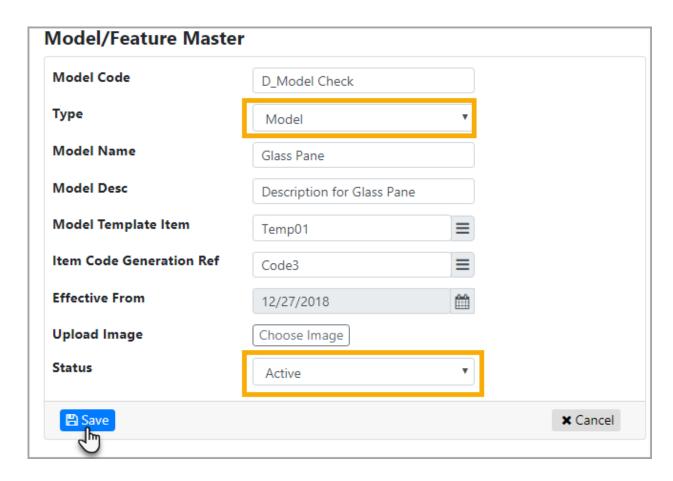
Save: Clicking this button saves the record.

Cancel: Clicking this button cancels the screen, and the record will not be saved.

6.2 Procedure to add the Model Code

- 1. On Model / Feature Master screen, click the Add Row button (+ Add).
- 2. On resulting window, enter the model code associated with feature in the **Model Code** field.
- 3. Select type as **Model** with help of dropdown menu available near the **Type** field.
- 4. Enter the name of model in the **Model Name** field.
- 5. Enter description associated with the model in the Model **Desc** field.
- 6. Select template associated with the model by clicking lookup () available near the **Model Template Item** field.
- 7. Select **Item Code Generation Reference** by clicking lookup () available near field.
- 8. Select date from which you want Feature Code to become effective with help of Calendar icon () available near the **Effective From** field.
- 9. If you want to attach an image, click **Choose Image** button available near the **Upload Image** field. On resulting window, browse, locate, and select the image.
- 10. Select status as Active by clicking dropdown menu available near the Status field.
- 11. Click Save button to save the created model.
- 12. Alternatively, click **Cancel** to close the screen.





6.2.1 Key Terms

Model Code: This field enables you to add the model code for the product. This is a user-defined field that allows you to defined Model and Feature code for the product.

Type: The dropdown menu available near this field enables you to select the type as either **Feature** or **Model**. You need to select the type as **Model** to add a **Mode Code**.

Model Name: This field enables you to enter the name of the model.

Model Desc: This field enables you to enter the model description which helps you in easily identifying the model.

Model Template Item: This field enables you to select the **Model Template Item** by clicking the lookup available near the **Model Template Item** field.

Item Code Generation Ref: This field enables you to select the Item Code Generation reference by clicking the lookup available near this field.

Effective From: You can select the date on which you want the **Model Code** to become effective with the help of the Calendar icon available near this field.

Upload Image: Click the **Choose Image** button available near the **Upload Image** field to add an image.

Save: This button enables you to save the record.



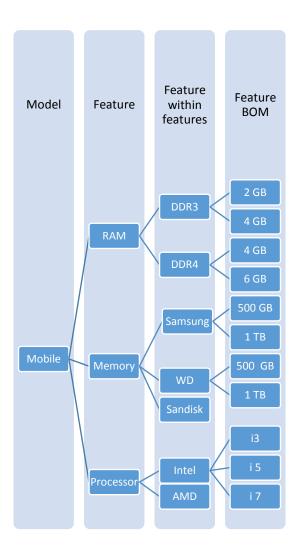
Cancel: Clicking this button closes the screen, and the record will not be saved.

7. Feature BOM

A feature BOM is list of intermediate components which forms a set of feature options available. For instance, a mobile (an item) can have various models (M10, M 20, M30), with varying features. Its feature BOM can include RAM: 2 GB, 3 GB, 4 GB and so on.

The feature screen enables you to:

- Create a Feature BOM entry
- Explode the BOM to ascertain the components
- Ascertain the associated BOMs



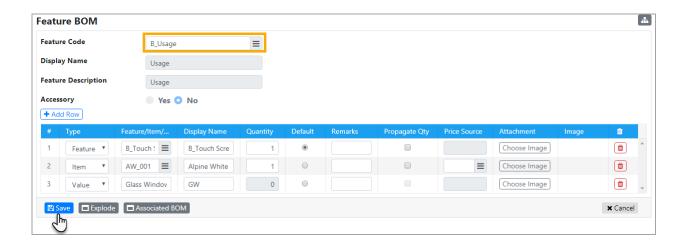


7.1 Procedure

- 1. On the **Feature BOM** screen, click the **Add Row button** (+ Add).
- 2. On the resulting window, select the feature code by clicking the lookup () available near the **Feature Code** field. On clicking this lookup, the resulting window displays all the existing Feature IDs along with their respective **Code** and **Name**.
- 3. The values in the **Display Name** and **Feature Description** fields are picked automatically from the **Feature Master** screen.
- 4. If you want to add any accessory for the feature, select the option as **Yes** available in the **Accessory** field. Otherwise select the option as **No**.
 - ONOTE: If you have selected the option as Yes, you will be able to add the accessories with the help of the Model BOM screen.
- 5. Click the **Add Row** button (available in the middle of the grid. On clicking this button, the following fields will be displayed.
- 6. Select the type by clicking the dropdown menu available on the **Type** field. On clicking this dropdown the following options will be displayed:
 - Feature
 - Item
 - Value
- 7. The lookup () available on the **Feature/Item/Value** field displays the data based on the type of selection on the **Type** field.
 - Type selected as Feature on the Type field: If you have selected the type as Feature in the Type
 field, the lookup will display all the existing Feature IDs. You need to select the Feature ID of
 your choice.
 - Type selected as **Item** on the **Type** field: If you have selected the type as **Item** in the **Type** field, the lookup will display all the existing Items. You need to select the Item of your choice.
 - Type selected as **Value** on the **Type** field: If you have selected the type as **Value** in the **Type** field, you need to enter the value in the **Feature/Item/Value** field.
- 8. Enter a display name associated with the **Feature/Item/Value** in the **Display Name** field. The **Display Name** enables easy identification of the same.
- 9. Enter the quantity in the Quantity field.
- 10. Select the checkbox available in the **Default** column if you want to make the Feature, Item, or Value as default.
- 11. Enter any special comments if you want to in the Remarks column.
- 12. The **Propagate Quantity** is applicable only for the type selected as **Feature** and **Item** in the **Type** field. Select the checkbox available in this field if you want to make them as the **Propagate Quantity**.
- 13. The **Price Source** field is applicable only for the type selected as Item in the **Type** field. On clicking the lookup () available near this field, the resulting window displays all the existing items. You need to select an item of your choice.
- 14. If you want to attach an image, click the **Choose Image** button available in the **Attachment** column. On the resulting window, browse, locate, and select the image. The image selected by you will be displayed in the **Image** column.



- 15. Click Save button save the record.
- 16. Alternatively, click **Cancel** button to close screen. The changes made by you will not be saved.



7.1.1 Key Terms

Feature Code: The lookup available near this field enables you to select the feature code for the product.

Display Name: The value in this field is picked automatically from the **Feature Master** screen.

Feature Description: The value in this field is picked automatically from the Feature Master screen.

Accessory: This field enables you to add an accessory for the feature.

Add Row button (+ Add Row): This button enables you to add rows in the grid.

Type: The dropdown menu available near this field enables you to select the type of your choice.

Feature / Item / Value field: The lookup available near this field enables you to select the data based on the type of selection on the **Type** field.

Display Name: This field enables you to enter a display name for the Feature/ Item/Value.

Quantity: This field enables you to enter the quantity.

Default: This column enables you to select either the **Feature**, or the **Item**, or the **Value** as the Default one. The **Feature / Item / Value** which you have made as default here will be used on the **Configuration Wizard** screen.

Remarks: This field enables you to enter any special comments.

Propagate Quantity: The propagate quantity refers to multiplication or increase in BOM item quantity with a subsequent increase in quantity of finished good item to be produced. Selecting this check box proportionately increases the BOM item quantity while configuring the product and gets reflected in in the **Model BOM to Configure Product** within **Configuration Wizard** screen.



Price Source: The **Price Source** field is applicable only for the type selected as Item in the **Type** field. On clicking the lookup available near this field, the resulting window displays all the existing items. You need to select an item of your choice.

Attachment: This field enables you to include an image of your choice.

Image: If you have attached an image, this will be displayed in this column.

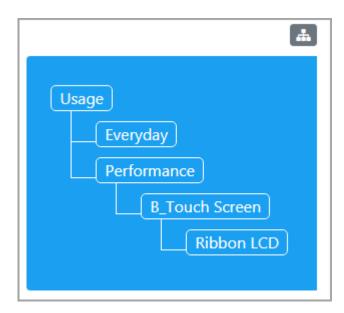
Save: Click this button to save the record.

Cancel: Clicking this button cancels the screen, and the record will not be saved.

7.2 Explode BOM

The **Explode** (button available in the **Feature BOM** screen provides you a Tree View of the **Feature BOM** created by you.

On clicking this button, the **Parent** and **Child** items associated with the **Feature BOM** will be displayed as shown in the following screen:

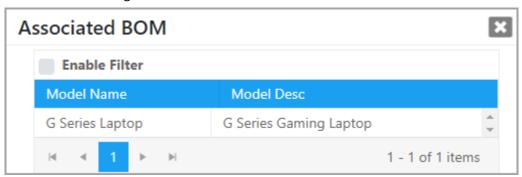


7.3 Associated BOM

The **Associated BOM** (Associated BOM) button available in the **Feature BOM** screen displays all the BOMs associated with the **Feature BOM** created by you.

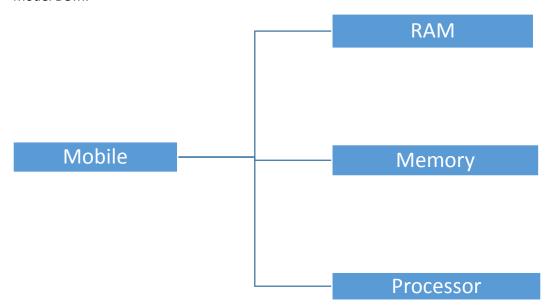


On clicking this button, the resulting **Associated BOM** window displays all the BOMs associated with it as shown in the following screen:



8. Model BOM

A model BOM is a list of intermediate components, sub-assemblies or raw materials required to manufacture an Item Model. For instance, to manufacture a smart phone model the BOM would include model specific Screen, Processor, Battery etc. This list of intermediate components can be referred as Model BOM.



In OptiProERP Configurator, the Model BOM screen enables you to:

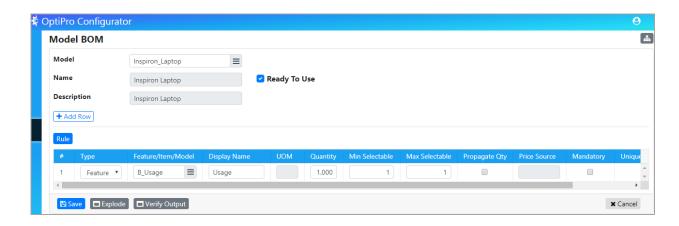
- Create a Model BOM entry.
- Explode the BOM to ascertain the components.
- Verify the output.



8.1 Procedure

- 1. On the **Model BOM** screen, click the **Add Row button** (+ Add).
- 2. On the resulting window, select the model by clicking the lookup (=) available near the Model field
- 3. The values in the **Name** and **Description** fields are picked automatically from the **Model Master** screen.
- 4. Select the **Ready To Use** checkbox to make the BOM active and ready to be used in production.
- 5. Click the **Add Row** button (available in the middle of the grid. On clicking this button, the following fields will be displayed.
- 6. Select the type by clicking the dropdown menu available on the **Type** field. On clicking this dropdown the following options will be displayed:
 - Feature
 - Item
 - Model
- 7. The lookup () available on the **Feature/Item/Model** field displays the data based on the type of selection on the **Type** field.
 - Type selected as Feature on the Type field: If you have selected the type as Feature in the Type
 field, the lookup will display all the existing Feature IDs. You need to select the Feature ID of
 your choice.
 - Type selected as **Item** on the **Type** field: If you have selected the type as **Item** in the **Type** field, the lookup will display all the existing Items. You need to select the Item of your choice.
 - Type selected as Model on the Type field: If you have selected the type as Model in the Type field, the lookup will display all the existing models. You need to select the Model of your choice.
- 8. Enter a display name associated with the **Feature/Item/Model** in the **Display Name** field. The **Display Name** enables easy identification of the same.
- 9. The **UOM** field is applicable only for the type selected as **Item** in the **Type** field. On clicking the lookup () available near this field, the resulting window displays all the existing items. You need to select an item of your choice.
- 10. Enter the minimum and maximum quantities in the **Min** and **Max** selectable fields respectively.
- 11. The **Propagate Quantity** is applicable only for the type selected as **Feature** and **Item** in the **Type** field. Select the checkbox available in this field if you want to make them as the **Propagate Quantity.**
- 12. The **Price Source** field is applicable only for the type selected as **Item** in the **Type** field. On clicking the lookup () available near this field, the resulting window displays all the existing items. You need to select an item of your choice.
- 13. Select the checkboxes available in the Mandatory and Unique columns respectively.
- 14. Click Save button to save record.
- 15. Alternatively, click Cancel button to close the screen. The changes made by you will not be saved.





8.1.1 Key Terms

Model: The lookup available near this field enables you to select the model.

Ready to Use: If this checkbox is selected, then it implies that the model BOM is active and can be used for production.

Name: The value in this field is picked automatically from the Model Master screen.

Description: The value in this field is picked automatically from the **Model Master** screen.

Grid Details:

Type: The dropdown menu available near this field enables you to select the type of your choice.

Feature/Item/Model: The lookup available near this field enables you to select the data based on the type of selection on the **Type** field.

Display Name: This field enables you to enter a display name for the Feature/Item/Model.

UOM: The **UOM** field is applicable only for the type selected as **Item** in the **Type** field. On clicking the lookup available near this field, the resulting window displays all the existing items. You need to select an item of your choice.

Quantity: This field enables you to enter the quantity.

Min Selectable: This field enables you to select the minimum selectable quantity.

Max Selectable: This field enables you to select the maximum selectable quantity.

Propagate Quantity Below: The propagate quantity refers to multiplication or increase in BOM item quantity with a subsequent increase in quantity of finished good item to be produced. Selecting this check box proportionately increases the BOM item quantity while configuring the product and gets reflected in in the **Model BOM to Configure Product** within **Configuration Wizard** screen.

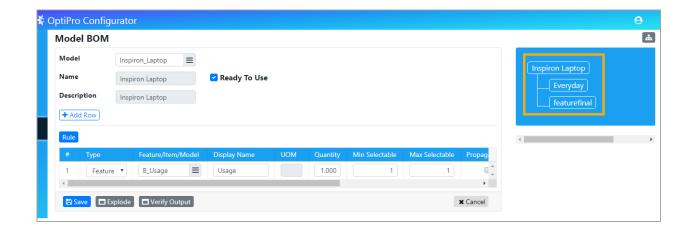
Price Source: This field displays price list of BOM item. The **Price Source** field is applicable only for the type selected as Item in the **Type** field. On clicking the lookup available near this field, the resulting window displays all the existing options. You need to select an item of your choice.



8.2 Explode BOM

The **Explode** (button available in the **Model BOM** screen provides you a Tree View of the **Model BOM** created by you.

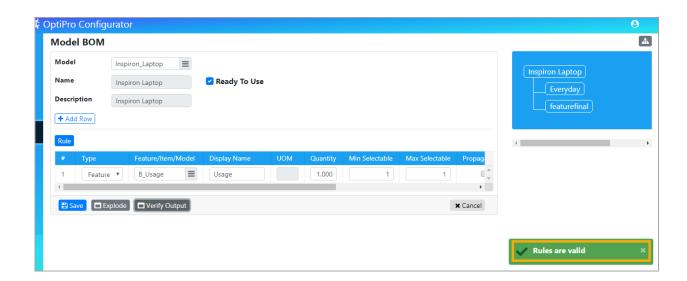
On clicking this button, the **Parent** and **Child** items associated with the **Model BOM** will be displayed as shown in the following screen:



8.3 Verify Output

The **Verify Output** (button available in the **Model BOM** screen enables you to ascertain whether the rules associated with the Model BOM created by you are valid.

On clicking this button, a validation message **Rules are valid** will be prompted as shown in the following screen:



9. Routing

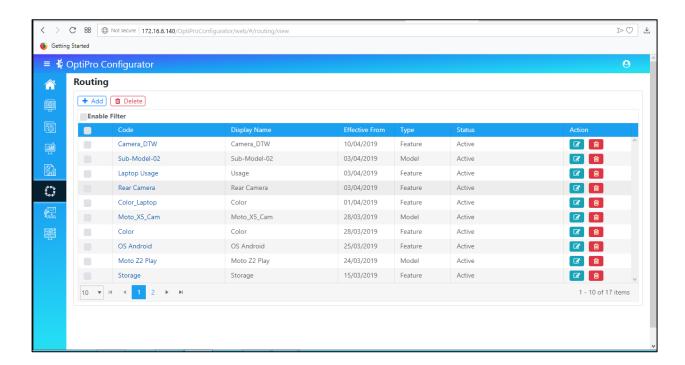
Routing specify the steps or tasks or operations used to manufacture an item. In OptiProERP Configurator, Routing is an optional functionality which allows you to define Routing for Model BOM and feature BOM by importing the list from SAP Business One rather than logging in the application and then create sales order/ quotation. Hence, this functionality lets you configure the BOM, compute price based on the steps and generate the sales order/ quotation all at a single platform thereby reducing efforts significantly.

For an item configuration, you need to add routing to a model with all its child feature and child items. Model routing is important for routing of features to work. The **Routing** screen maps the **Model BOM** and **Feature BOM** with their respective **Operations** as well as **Resources**.

9.1 Procedure

Use the following steps to add Routing:

- 1. Click **Routing** module icon in the left menu options.
- 2. All the created records appear in a list.
- 3. Select the check box against the consecutive code.
- 4. Click Add.



9.1.1 Key Terms



Add Button: The add button (+ Add) enables you to add a new record.

Delete Button: The delete button () enables you to delete an existing record.

Enable Filer: This checkbox (Enable Filter) enables you to apply filter to all the columns in the list.

Select All Checkbox: This checkbox on the top left () allows you to select all the rows at once.

Select Row Checkbox: This checkbox in front of each record () allows you to select that row.

Code: This column displays the unique code name of the feature/ model.

Display Name: This column displays the actual name of the Feature / model.

Effective From: This column displays the date from which the routing of the feature/ model is effective.

Type: This column displays the type of the item – *Feature* or *Model*.

Status: This column displays the status of the item – *Active* or *Inactive*.

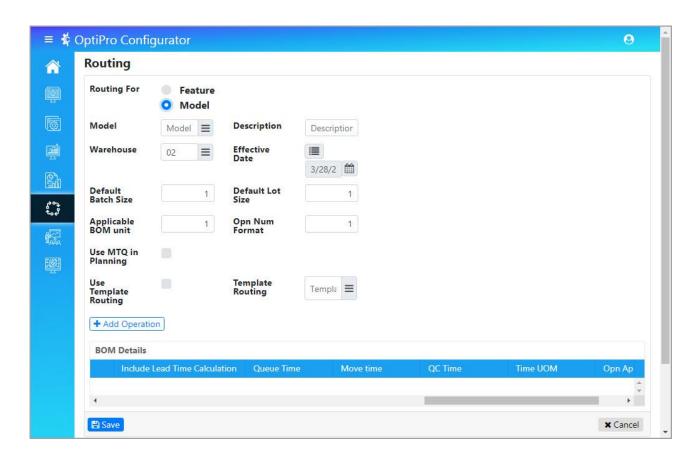
Action: This column displays the operations you can perform on the item – Edit () or Delete (

Tip: Double click an item to edit it directly.

9.2 Add routing for Model BOM

This screen opens on clicking Add button on Routing screen. You can use this screen to add Routing for Model or Feature.

The Routing for Model BOM screen allows you to define all details related to BOM like warehouse, effective date, default batch size, BOM unit, operation number format along with bill of materials components required to manufacture a Model item.

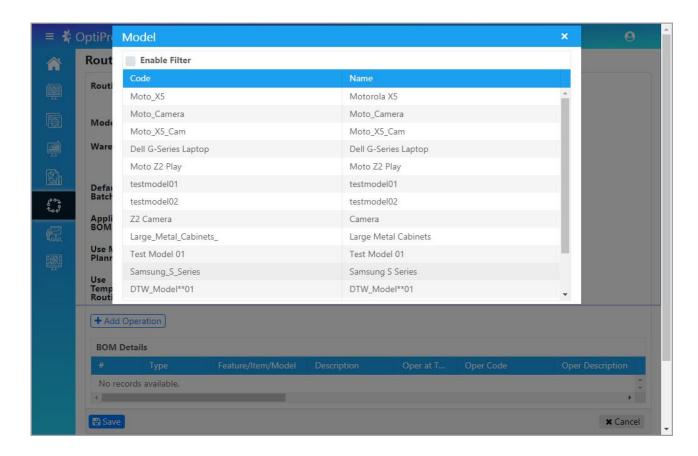


9.2.1 Procedure

Following are the steps to add a new record:

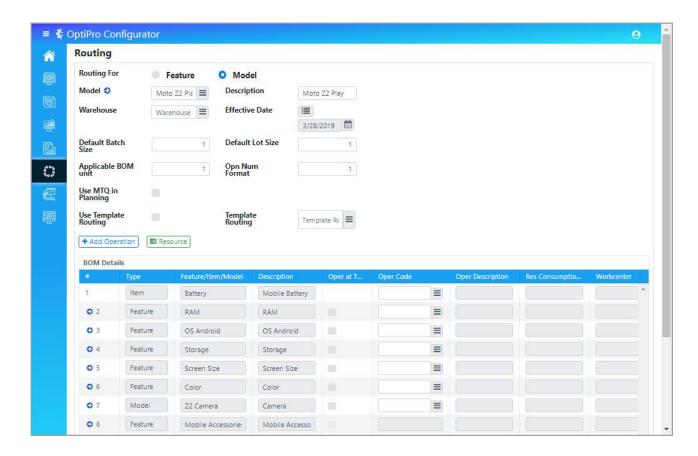
- 3. Select the **Model** radio button () to add a new model BOM.
- 4. Click the menu icon () against the **Model** field.

OptiProERP Product Configurator User Guide

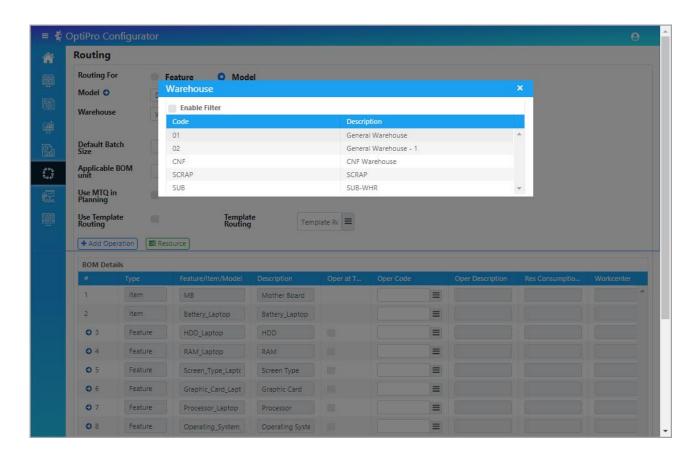


5. Select a model from the list.

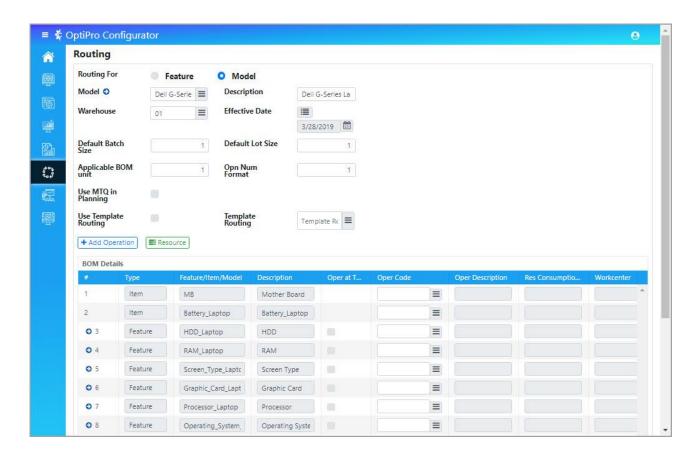
OptiProERP Product Configurator User Guide



- 6. The hyperlink icon () appears once an item is selected from the list.
- 7. Click this icon to view or edit the details of the model selected.
- 8. The description associated with the model is automatically populated and displayed in **Description** field. You also edit the description.
- 9. Click the menu icon () against the **Warehouse** field.



10. Select a warehouse from the list.



- 11. Select the effective date from the calendar.
 - Note: Click the Override icon () above to override the Effective Date in BOM Details.
- 12. The fields **Default Batch Size**, **Default Lot Size**, **Applicable BOM Unit**, and **Operation Number Format** are by default 1.

You can edit these fields as per requirement.

- 13. Select the **Use MTQ** in **Planning** checkbox to set a minimum transfer quantity in planning.
- 14. Select the Use Template Routing checkbox to use a pre-defined template routing.
- 15. Click the menu icon () against the **Template Routing** field.
- 16. Select a template from the list to set it as the pre-defined template.
- 17. All the operations related to the model are listed under **BOM Details**.

It has the following columns – #, Type, Feature/Item/Value, Description, Operation at Top Level, Operation Code, Operation Description, Resource Consumption, Workcenter, MTQ, Count Point Operation, Auto Move, Effective Date, Include Lead Time Calculation, Queue Time, Move Time, QC Time, Time UOM, Operation Applicable, and Delete.

- 18. Click the menu icon () against the **Operation Code** field.
- 19. Select an operation from the list.
- 20. Operation Description is populated automatically.



- 21. Click **Add Operation** button (+ Add Operation) to add a new operation.
- 22. Click **Resource** button () to add a new resource.
- 23. To insert an opertaion in between, click the **Insert Operaton** button.(
- 24. To change the move the operations up or down, click on button (
- 25. Select, or type, all the other grid details.
- 26. Click **Save** to add the operation.
- 27. To discard the changes, click **Cancel** button.

9.2.2 Key Terms

Routing For Feature: This button enables you to add operations for Feature BOM.

Routing For Model: This button enables you to add operations for Model BOM.

Model: Use this field to enter or search the model from the model list.

Description: Use this field to enter details related to the model selected. This is an optional field.

Warehouse: Use this field to search and select the warehouse for the Model. This is a mandatory field.

Effective Date: Use this field to select the date from which you want to make the model BOM effective. Select on the calendar icon to select the date.

Default Batch Size: Use this field to enter the default batch size. The default value in this field is 1. You can change it as per the requirement.

Default Lot Size: Use this field to display the default lot size. The default value in this field is 1. You can change it as per the requirement.

Applicable BOM Unit: Use this field to display resource consumption for the number of finished-good items to be produced. By default, the value in this field is 1. You can change it as per the requirement.

Operation Number Format: Use this field to define the sequence or number series consequent to each operation. The number series selected here gets displayed on the Routing screen. For instance, if you can



enter 100 in this field, the operations on Routing will be listed with series 100, 200, 300, 400 and so on. The operation number format entered here also gets implemented and incremented for child items within.

Use MTQ in Planning: Select this to use a minimum transfer quantity (MTQ) for production operation planning. Selecting the checkbox will calculate the lead time of operations using the MTQ (Minimum Transfer Quantity) quantity mentioned on each operation. The MTQ quantity will allow manufacturing of part quantity of the ordered quantity on each operation and move it to next operation for further processing rather than waiting for the complete quantity to be completed on each operation before moving to next operation.

Use Template Routing: Selecting this checkbox enables you to use a pre-defined template routing in future as Model BOMs readily rather than defining, selecting each BOM element and then add the same to routing.

Template Routing: Use this field to enter or search the template. This field displays the template routing selected.

Add Operation: This button (+ Add Operation) enables you to add new operations in the BOM Details.

Resource: This button (enables you to add resource to an operation. You can add a resource only when you select feature or model row in the BOM details grid. To add a resource you need to search, select or enter an operation code and then add a resource. For more details on Resource refer section 7.3 Routing Resources.

This button is visible only when you have assigned operation code in the selected grid row.

Insert Operation: This button (» Insert Operation) enables you to add operation in the grid.

Operation Up and Down: Clicking this button shifts the operations in the grid up and down respectively.

Routing Details



The BOM details section displays the BOM items in grid format with all related details. The grid displays BOM details: Item, Feature, Value, Model respectively. You can use this section to add operation or move operation up or down.

#: This column displays the sequence of the operation in the list.

Type: This column displays the type of the operation – *Feature, Item, Value* or *Operation*.

Feature/Item/Value: This column displays the code of feature, item or value.

Description: This column displays the description of feature, item or value.

Operation at Top Level: This checkbox enables you to move the selected operation to top.

Operation Code: Use this field to search and select the operation code. Click on the lookup and select the operation from the popup screen and select the operation code. To select an operation code, you must assign a warehouse at the header area. Selecting the operation code populates details in the fields: **Operation Descrip., Res. Consumption** and **Work Center**.

Operation Description: This column displays the description of the selected operation. This field is disabled and populates details on selection of **Operation Code**.

Resource Consumption: This column displays the number of resources consumed by the selected operation. The value in this field is disabled and populates on selection of Operation Code.

Work center: This column displays the code of the work center. The value in this field is disabled and populates on selection of Operation Code.

MTQ: This column displays the minimum transfer quantity to be transferred to the next operation for further processing rather than waiting for the complete quantity to be completed on each operation before moving to next operation. The default value in this field is 1. You can change the same as per the requirement.

Count Point Operation: If this checkbox is selected then corresponding operation cannot be skipped during production process. The checkbox can be selected or deselected manually for all operation types except



Sub-contracting and Inspection QC. In case of sub-contracting and Inspection QC, the checkbox is disabled

by default.

Auto Move: Select this checkbox to move items from one operations to another automatically on

completion. You cannot select first operation for Auto Move.

Effective Date: Use this column to displays the date from which the operation is effective. You can either

select the current date or future date in this.

Include in Lead Time Calculations: Use this checkbox to update lead time calculation in fields.

Queue Time: Use this field to enter the waiting for a component to start an operation. The Queue time is

calculated using the time and UOM mentioned on the Operation. These times are applicable for the entire

operation and not for any resource and hence are independent of resources assigned to the operation.

 ${f 0}$ **Note**: Queue time is set to zero on all operations except the first operation in a routing when MTQ flag is

applicable.

Move Time: Enter the time required to complete a particular operation before moving to next operation..

It is a non-mandatory field.

QC Time: Use this field to enter the time taken to perform QC.

Time UOM: This column displays the unit of measurement of time – *Hours*, or *Minutes*.

Operation Applicable: This checkbox enables you to apply, or not apply, the selected operation. If this

check box is selected you cannot make any changes in the entire row.

Delete: The delete icon () under this column enables you to delete an operation.

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ONotes:

- The delete icon () appears only against the operations that are added or inserted.
- Only operations added, or inserted, by you can be deleted.

Tip: To expand the width of a column, double-click on the column divider.

Save Button: Click this button to save the changes you make.

Cancel Button: Click this button to cancel the changes you make.

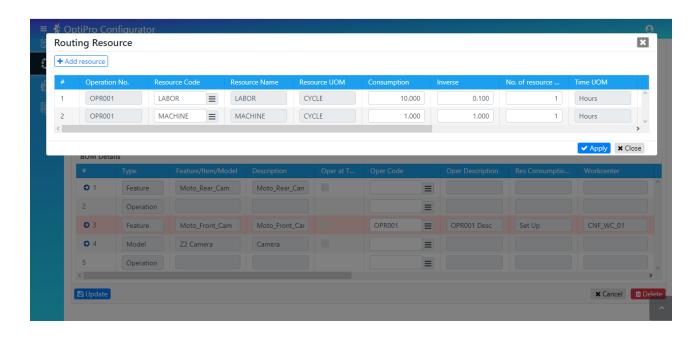
Tip: Use the *Hyperlink Icon* () to view and edit the details.

9.3 Routing Resource

The Routing resource screen enables you to assign resource on a routing. This resource can be a labor, machine or both. You can use this screen to add or delete the resources but you cannot delete all resources. The screen includes all resources within a work center for an operation.

Onote: You can open this screen only when you have entered operation code in the selected row.

To view screen, go to Routing > Add Routing > Routing for Model BOM/ Feature BOM.



9.3.1 Procedure

Use following procedure to add resource:

- 1. Click on the field **Resource Code** lookup icon.
- 2. Select the resource you want to add from the list.
- 3. In **Consumption Type**, select the consumption from the dropdown.
- 4. Select the check box **Schedule** to schedule the resource.
- 5. Select **Delete** to delete a resource.
- 6. Click Apply.

9.3.2 Key Terms

Operation No.: This field displays the operation number of the resource. This detail is populated from Routing screen.

Resource Code: Use this field to select the resource from the lookup. Clicking this icon opens list of resources. You can select one from the list.

Resource Name: This field displays the resource name. It can either be Labor or Machine.

Resource UOM: This field displays the unit of measurement of the resource.

Consumption: This field displays the consumption of resource based for production of one unit of item.

Inverse: This field displays the inverse of the consumption. Inverse = i.e. 1/value in consumption field.



No. of resources: Use this field to enter the number of resources used.

Time UOM: This field displays the unit of measurement in terms of time.

Consumption: This field displays the resource consumption of the resources.

Inverse: This field displays the inverse of the resource.

Consumption Type: Use this field to select consumption type from the drop down. The options in this field include: manual, automatic, operation issue. The values here are populated from operation master.

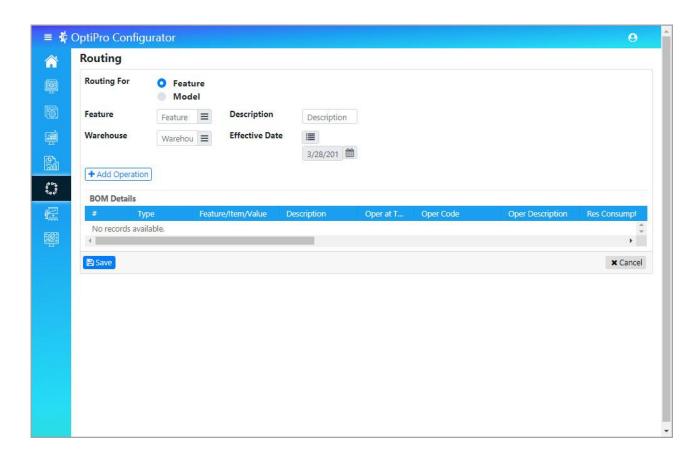
Basis: This is a disabled field which displays the basis on which resource is consumed. The drop-down options here include: Item, batch, fixed, setup.

Schedule: Use this check box to schedule the resource.

9.4 Add routing for Feature BOM

On the Routing screen, click the Add button on top (+ Add) to add a new record

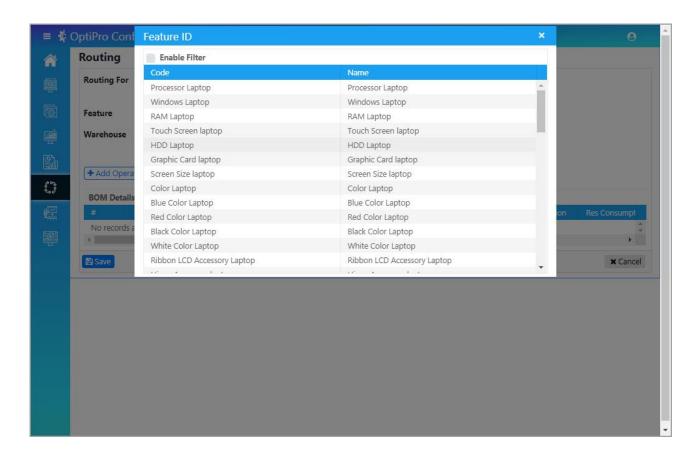




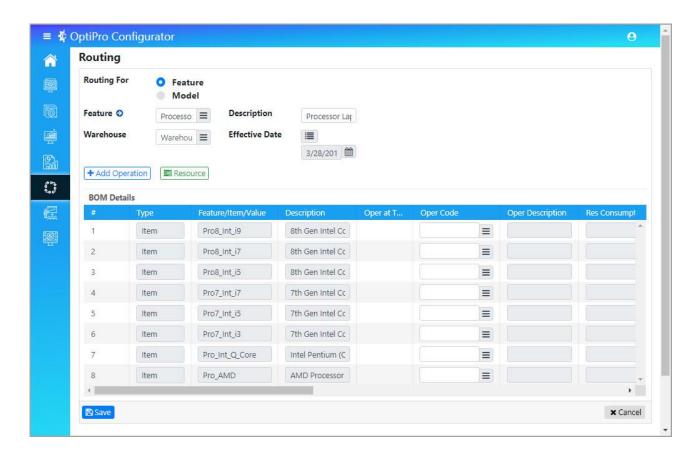
9.4.1 Procedure

Following are the steps to add a new record:

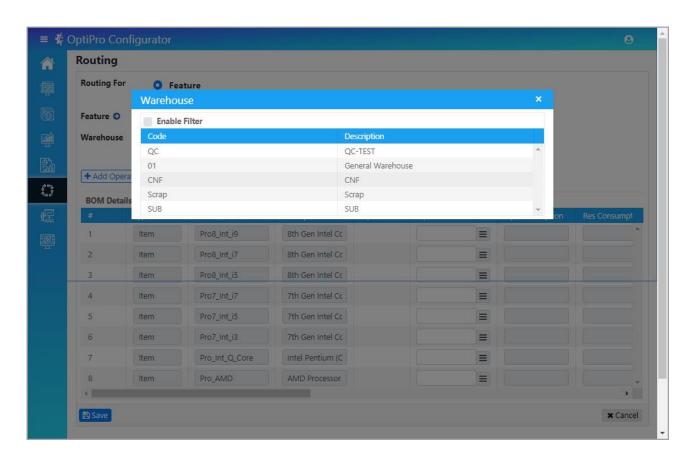
- 1. Select the **Feature** radio button () to add a new feature.
- 2. Click the menu icon () against the **Feature** field.



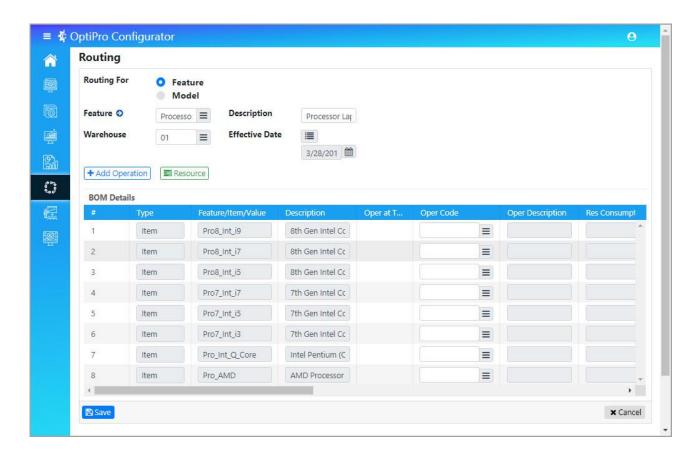
3. Select a feature from the list.



- 4. The hyperlink icon ($^{\odot}$) appears once an item is selected from the list.
- 5. Click this icon to view or edit the details of the feature selected.
- 6. The description associated with the feature is automatically populated and displayed in the **Description** field. You also edit the description.
- 7. Click the menu icon () against the **Warehouse** field.



8. Select a warehouse from the list.



- 9. Select the effective date from the calendar.
 - Onte: Click the Override icon () above to override the Effective Date in BOM Details.
- 10. All the operations related to the feature are listed under **Routing Details**.

It has the following columns – #, Type, Feature/Item/Value, Description, Operation at Top Level, Operation Code, Operation Description, Resource Consumption, Work center, MTQ, Count Point Operation, Auto Move, Effective Date, Include Lead Time Calculation, Queue Time, Move Time, QC Time, Time UOM, Operation Applicable, and Delete.

- 11. Click the menu icon () against the **Operation Code** field.
- 12. Select an operation from the list.
- 13. Operation Description is automatically populated.
- 14. Click **Add Operation** button (Add Operation) to add a new operation.
- 15. Click **Resource** button () to add a new resource.
- 16. Select, or type, all the other grid details.
- 17. Select on a row within BOM Details.
- 18. To insert an opertaion in between, click the **Insert Operation** button.(



19. To change the sequence of the listed operations, click on Operation Up and Down button (



- 20. Click **Save** to add the operation.
- 21. To discard the changes, click **Cancel** button.

9.4.2 Key Terms

Routing For Feature: This button enables you to add operations for **Feature BOM**.

Routing For Model: This button enables you to add operations for Model BOM.

Model: Use this field to enter or search the model from the model list.

Description: Use this field to enter details related to the model selected. This is an optional field.

Warehouse: Use this field to search and select the warehouse for the Model. This is a mandatory field.

Effective Date: Use this field to select the date from which you want to make the model BOM effective. Select on the calendar icon to select the date.

Override Button: This button () enables you to override the Effective Date in BOM Details.

Add Operation: This button (+ Add Operation) enables you to add new operations in the BOM Details.

Resource: This button (enables you to add resource to an operation.

Insert Operation: This button (>> Insert Operation) enables you to add feature BOM.

Operation Up and Down: This button allows you to Move Operation up and down.

Routing Details

The BOM details section displays the BOM items in grid format with all related details. The grid displays BOM details: Item, Feature, Value, Model respectively. You can use this section to add operation or move operation up or down.

#: This column displays the sequence of the operation in the list.

Type: This column displays the type of the operation – *Feature, Item, Value* or *Operation*.



Feature/Item/Value: This column displays the code of feature, item or value.

Description: This column displays the description of feature, item or value.

Operation at Top Level: This checkbox enables you to move the selected operation to top.

Operation Code: Use this field to search and select the operation code. Click on the lookup and select the operation from the popup screen and select the operation code. To select an operation code, you must assign a warehouse at the header area. Selecting the operation code populates details in the fields: **Operation Descrip.**, **Res. Consumption** and **Work Center**.

Operation Description: This column displays the description of the selected operation. This field is disabled and populates details on selection of **Operation Code**.

Resource Consumption: This column displays the number of resources consumed by the selected operation. The value in this field is disabled and populates on selection of Operation Code.

Work center: This column displays the code of the work center. The value in this field is disabled and populates on selection of Operation Code.

MTQ: This column displays the minimum transfer quantity to be transferred to the next operation for further processing rather than waiting for the complete quantity to be completed on each operation before moving to next operation. The default value in this field is 1. You can change the same as per the requirement.

Count Point Operation: If this checkbox is selected then corresponding operation cannot be skipped during production process. The checkbox can be selected or deselected manually for all operation types except Sub-contracting and Inspection QC. In case of sub-contracting and Inspection QC, the checkbox is disabled by default.

Auto Move: Select this checkbox to move items from one operations to another automatically on completion. You cannot select first operation for Auto Move.

Effective Date: Use this column to displays the date from which the operation is effective. You can either select the current date or future date in this.

Include in Lead Time Calculations: Use this checkbox to update lead time calculation in fields.



Queue Time: Use this field to enter the waiting for a component to start an operation. The Queue time is calculated using the time and UOM mentioned on the Operation. These times are applicable for the entire operation and not for any resource and hence are independent of resources assigned to the operation.

Note: Queue time is set to zero on all operations except the first operation in a routing when MTQ flag is applicable.

Move Time: Enter the time required to complete a particular operation before moving to next operation.. It is a non-mandatory field.

QC Time: Use this field to enter the time taken to perform QC.

Time UOM: This column displays the unit of measurement of time – *Hours*, or *Minutes*.

Operation Applicable: This checkbox enables you to apply, or not apply, the selected operation. If this check box is selected you cannot make any changes in the entire row.

Delete: The delete icon () under this column enables you to delete an operation.



- 22. The delete icon () appears only against the operations that are added or inserted.
- 23. Only operations added, or inserted, by you can be deleted.



Save Button: Click this button to save the changes you make.

Cancel Button: Click this button to cancel the changes you make.

10. Rule Workbench

The rule work bench functionality is a set of rules which allows you to manage, assign rules for selection of features of an item.

The **Rule Workbench** screen broadly comprises of the following sections:

- 1. Input
- 2. Output

The rules created in this screen are used at the time of configuring the Model BOM for the product using the **Configuration Wizard** screen.

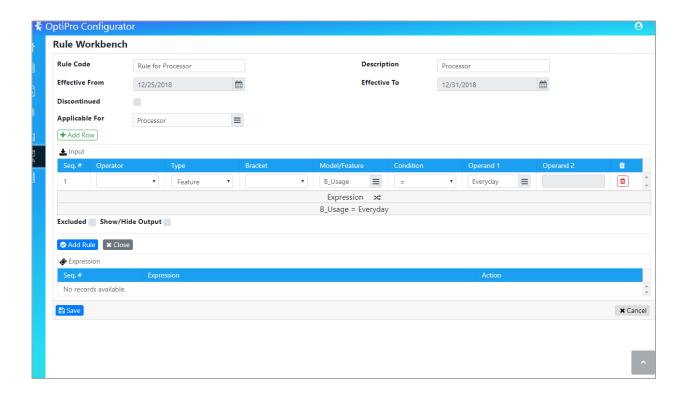
10.1 Procedure



- 1. Enter the name of the rule in the Rule Code field.
- 2. Enter the description associated with the rule in the **Description** field.
- 3. Select the date from which you want the rule code to become effective with the help of the Calendar icon () available near the **Effective From** field.
- 4. Select the date till which you want the rule code to be effective with the help of the Calendar icon (

 ignormal and in the code to be effective with the help of the Calendar icon (

 ignormal and i
- 5. Select the product for which you want the rule to be applicable by clicking the lookup (=) available near the **Applicable For** field.
- 6. Click the **Add Row** button (available in the middle of the grid. On clicking this button, the following fields will be displayed.
- 7. Select the operator as **And**, **Or**, and **Blank** to create the rule with the help of the dropdown available near the **Operator** field.
- 8. Select the type as either **Feature** or **Item** with the help of the dropdown available near the **Type** field.
- 9. Select the type of bracket with the help of the dropdown available near the **Bracket** field.
- 10. Select the **Model/Feature** by clicking the lookup (=) available near the **Model/Feature** field.
- 11. Select the condition applicable for the rule with the help of the dropdown available near the **Condition** field.
- 12. Select the **Operand 1** associated with the rule by clicking the lookup () available near the **Operand 1** field.
- 13. Click the Add Rule button to add more rules.
- 14. Click the **Save** button to save the record.
- 15. Click the Cancel button to cancel the screen. The changes made by you will not be saved.



10.1.1 Key Terms

Rule Code: This field enables you to enter the name of the rule.

Description: This field enables you to enter the description.

Effective From: This field enables you to select the date from which you want the rule code to become effective with the help of the Calendar icon available near the field.

Effective To: This field enables you to select the date till which you want the rule code to remain effective with the help of the Calendar icon available near the field.

Discontinued: If this checkbox is selected, the rule will be discontinued from use.

Applicable For: This field enables you to select the product for which you want the rule to be applicable by clicking the lookup available near this field.

Sequence No: The value in this field is automatically generated.

Operator: This field enables you to select the operator needed to create the rule with the help of the dropdown available near this field.

Type: This field enables you to select the type with the help of the dropdown available near this field.

Bracket: This field enables you to select the type of bracket with the help of the dropdown available near this field.



Model/Feature: This field enables you to select the **Model/Feature** by clicking the lookup available near this field.

Condition: This field enables you to select the condition applicable for the rule with the help of the dropdown available near this field. The following are the conditions which are listed under this field:

"=" Equal to

"<>" Not equal to

">" Greater Than

"<" Less Than

">=" Greater than or equal to

"<=" Less than or equal to

"Between"

Operand1 and Operand 2: This field enables you to select the **Operand 1** and Operand 2 associated with the rule by clicking the lookup available near the respective fields.

Add Rule: This button enables you to add more rules.

Save: This button enables you to save the record.

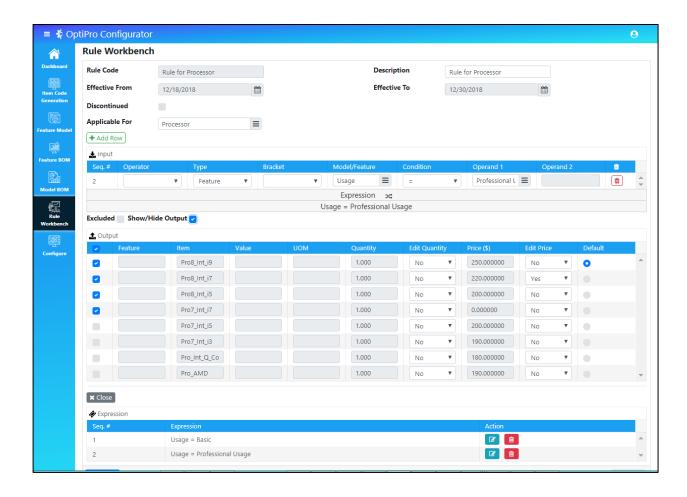
Cancel: Clicking this button cancels the screen, and the record will not be saved.

10.2 Output Window

This window displays the resultant output of the rule based on the input specified by you on the Input window.

10.3 Procedure

- 1. Click the dropdown menu available near the **Edit Quantity** field to change the quantity.
- 2. Click the dropdown menu available near the **Edit Price** field to change the price.



10.3.1 Key Terms

Feature: This field displays the resultant feature based on the inputs specified by on the Input window.

Item: This field displays the item based on the Input expression specified by on the Input window.

Value: This field displays the feature values of the product.

UOM: This field displays the **Unit of Measure** of the product.

Quantity: This field represents the required quantity of item based on the input expression specified by you on the Input Window.

Edit Quantity: The dropdown available near this field enables you to modify the quantities associated with the item.

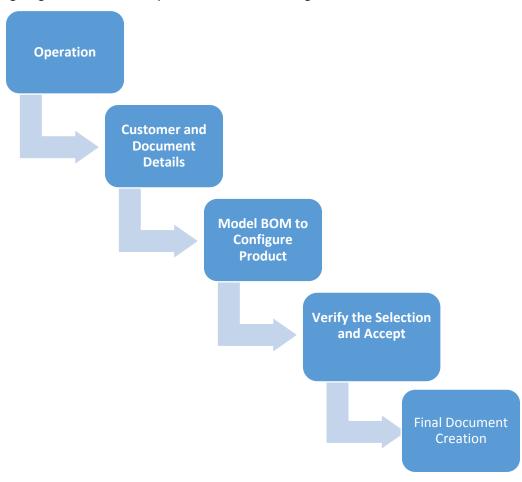
Price: This field displays the price associated with the resultant item.

Edit Price: The dropdown available near this field enables you to modify the price associated with the item.



11. Configuration Wizard

The following diagram illustrates the process flow in the Configuration Wizard:



11.1 Operation

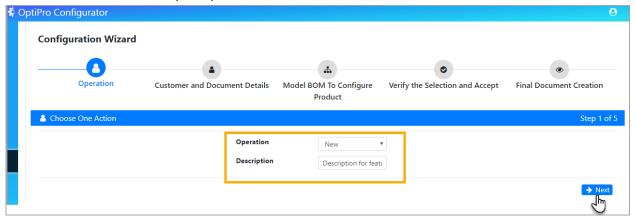
The **Operation** window enables you to select the type of operation and enter a description for it.

11.1.1 Procedure

- 1. Select the type of operation with the help of the dropdown menu available near the **Operation** field. On clicking the dropdown available near this field, the following options will be listed:
 - **New**: Select this option if you want to create a fresh configuration.
 - **Modify Existing**: Selecting this option enables you to make changes to the existing configurations associated with the model BOMs configured by you.
 - **Duplicate**: Select this option if you want to create an identical configuration. Let us say that you have created a configuration for the model Inspiron Laptop. Further the same client or a different client needs the same configuration. Thus you can create an identical configuration by selecting this option.



- **View**: Selecting this option enables you to only view the various details associated with the existing configurations of the model BOMs.
- 2. Enter a description in the **Description** field.
- Click the Next button (→ Next).



11.2 Customer and Document Details

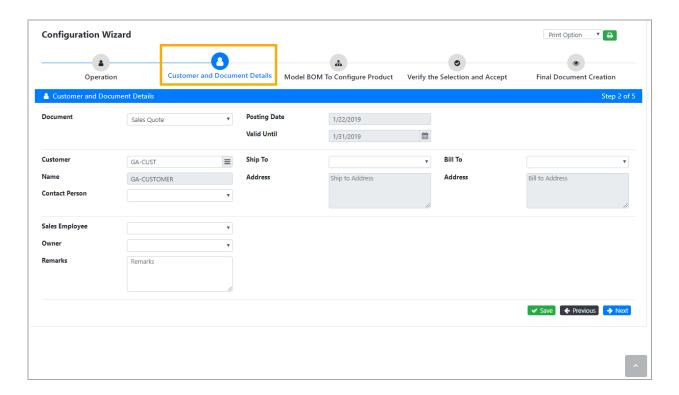
This window enables you to select the type of document and the contact information, Ship To address associated with the customer.

11.2.1 Procedure

- 1. Select the type of the document with the help of the dropdown menu available near the **Document** field. On clicking the dropdown available near this field, the following options will be listed:
 - **Draft**: Select this option if you want to create a draft associated with the configuration. The draft enables you to know the final output associated with the configuration of the Model BOMs configured by you as well as the various costs associated with them. Further you can use the draft for internal purposes.
 - **Sales Quote**: Selecting this option generates a Sales Quotation which you can submit to your clients.
 - Sales Order: This option enables you to generate a Sales Order.
- 2. Select the customer by clicking the lookup () available near the **Customer** field. On clicking the lookup () available near this field, the resulting window displays all the existing customers. You need to select a customer of your choice.
- 3. Select the name of the contact person by clicking the dropdown menu available near the **Contact Person** field.
- Select the name of the sales employee by clicking the dropdown menu available near the Sales Employee field.
- 5. Select the name of the owner by clicking the dropdown menu available near the **Owner** field.
- 6. Enter any special comments if you want to in the **Remarks** column.
- 7. Select the **Ship To** name with the help of the dropdown menu available near the **Ship To** field. On selecting the name, the **Ship To** address will be automatically displayed in the **Address** column.
- 8. Select the **Bill To** name with the help of the dropdown menu available near the **Bill To** field. On selecting the name, the **Bill To** address will be automatically displayed in the **Address** column.



9. Click the **Next** button ().



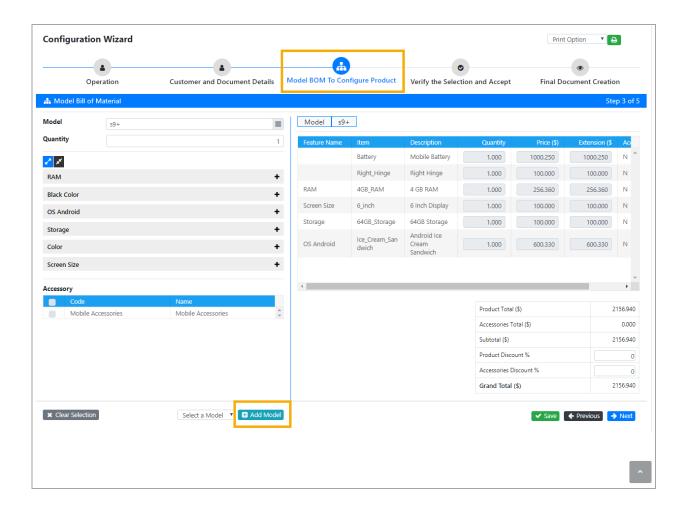
11.3 Model BOM To Configure Product

This window enables you to select the **Model BOM** and also enter the pricing details associated with product. You can add multiple Model BOMs with the help of this window.

11.3.1 Procedure

- Select the Model BOM by clicking the lookup () available near the Model field. On clicking this lookup, the resulting window will display all the existing Model BOMs created by you on the Model BOM screen. You need to select a Model BOM of your choice.
- 2. Enter the quantity in the **Quantity** field.
- 3. Enter the discount details associated with the product in the respective columns.
- 4. Click the **Add Model** button (Add Model) available in the bottom portion of the window if you want to add multiple models.
- 5. Select the Model BOM by clicking the lookup () available near the **Model** field. On clicking this lookup, the resulting window will display all the existing Model BOMs created by you on the **Model BOM** screen. You need to select a Model BOM of your choice.
- 6. Click the **Add Model** button (Add Model) available in the bottom portion of the window.
- 7. Click the **Next** button ().





11.4 Update Model

All the Model BOMs added will be displayed on clicking **Select a Model** dropdown (Select a Model of the window. Further if you want to make any changes to them, you can do so by selecting them.

11.4.1 Procedure

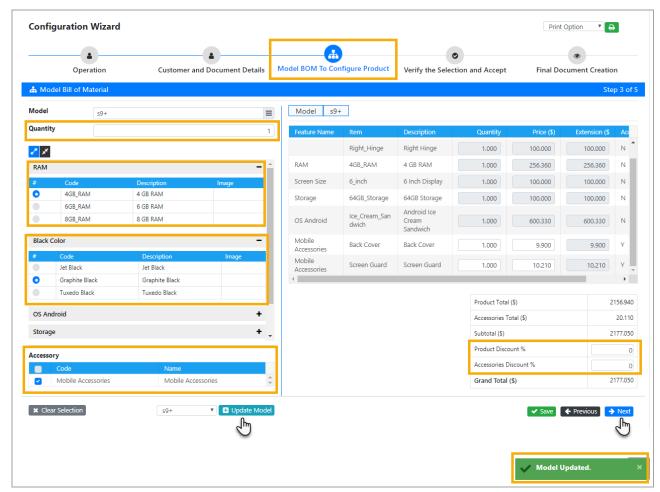
- 1. Click the **Select a Model** dropdown (Select a Model) available in the bottom portion of the window. All the Model BOMs added will be listed in the dropdown.
- 2. Select the Model BOM which you want to modify.
- 3. The various details associated with the selected Model BOM will be displayed in the respective sections on the window.

Example: Following are some of the examples wherein you can make changes to the Model BOM selected by you:

a. You can modify the quantities by entering a revised quantity in the **Quantity** field available in the top portion of the window.



- b. You can select a different configuration of the **RAM** by clicking the plus icon () available near the **RAM** column. On clicking the plus icon () all the available configurations will be listed. You need to select the configuration of your choice.
- c. You can select a different color by clicking the plus icon (*) available near the **Black Color** column. On clicking the plus icon (*) all the available shades associated with it will be listed. You need to select the shade of your choice.
- d. You can change the accessory of your choice by selecting the same listed under the **Accessory** column.
- e. You can modify the **Product Discount** and the **Accessories Discount** percentages by entering the revised amount in the respective field.
- 4. Click the **Update Model** button (Update Model) available in the bottom portion of the window. On clicking this button, you will receive a message **Model Updated**.
- Click the Next button (→ Next).



ONOTES:

• Clicking the **Expand** arrow () available on the top of the columns in the grid expands all the rows available in the grid.



- Clicking the **Collapse** arrow () available on the top of the columns in the grid collapses all the rows available in the grid.
- Clicking the plus icon (*) above each of the individual columns in the grid expands the columns.

11.5 Verification

This window enables you to verify the selection done by you in the other tabs and approve the same.

11.5.1 Procedure

- 1. The various information like the type of the order, **Posting Date**, **Delivery Date**, **Item**, Quantity, Price of the item, and the pricing details will be displayed in the respective portion in the window.
- 2. Verify the information displayed in the window.
- 3. Click the **Finish** button ().

O NOTES:

- Clicking **Edit this model** button () available in the **Action** column on the right portion of the window takes you to the **Model BOM To Configure Product** window, wherein you will be able to make changes to the respective Model BOM and update the same.
- Clicking **Remove this model** button () deletes the Model BOM configured by you.

11.6 Edit Model

There are instances in which you may want to make changes to the Model BOM. Following are some of the changes you may want to apply to the Model BOM:

- 1. To add or remove the accessories
- 2. Choose a different RAM configuration
- 3. Choose a different colour shade
- 4. Modify the discount percentages

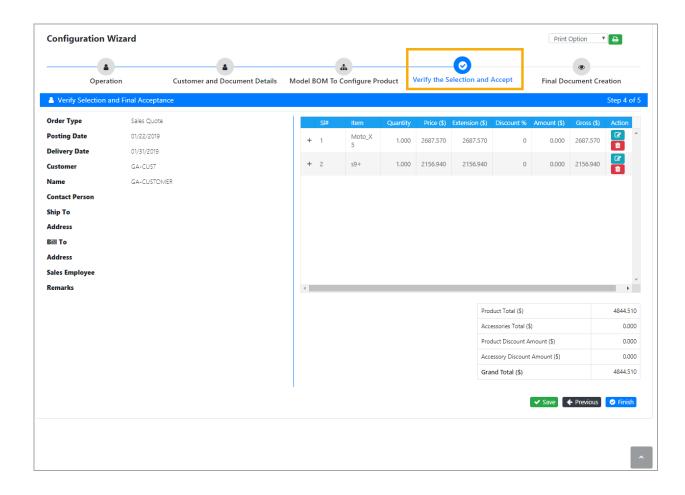
To make the above given changes, click **Edit this model** (on right pane, adjacent to each of the Model BOM)

11.6.1 Procedure

- 1. Click **Edit this model** button () available in **Action** column next to the Model BOM for which you want to make the changes.
- 2. The **Model BOM To Configure Product** window will be displayed. The various details associated with the Model BOM will be displayed in the respective sections on the window.



- 3. Make the necessary changes associated with the Model BOM. **Example**: Following are some of the examples wherein you can make changes to the Model BOM selected by you:
- You can modify the quantities by entering a revised quantity in the **Quantity** field available in the top portion of the window.
- You can select a different configuration of the **RAM** by clicking the plus icon (*) available near the **RAM** column. On clicking the plus icon (*) all the available configurations will be listed. You need to select the configuration of your choice.
- You can select a different color by clicking the plus icon (*) available near the Black Color column.
 On clicking the plus icon (*) all the available shades associated with it will be listed. You need to select the shade of your choice.
- You can change the accessory of your choice by selecting the same listed under the **Accessory** column.
- You can modify the **Product Discount** and the **Accessories Discount** percentages by entering the revised amount in the respective field.
- 4. Click **Update Model** (Update Model) in the bottom portion of the window. On clicking this button, you will receive a message **Model Updated**.
- 5. Click the Next button (). The **Verify the Selection and Accept** window will be displayed. All the changes made by you will be displayed in the respective columns for the Model BOM.
- 6. Click the **Finish** button (



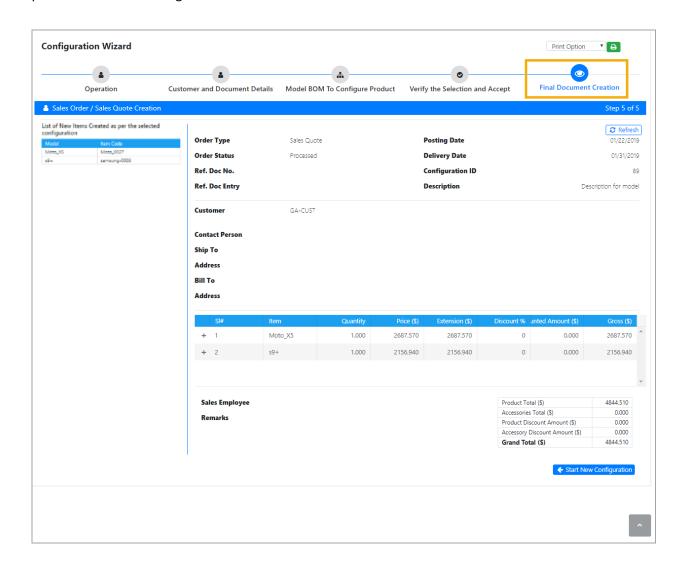
11.7 Final Document Creation

This window displays the list of new items created according to the configuration selected. This tab also displays other information such as the Order Type, Order Status, Posting Date, Delivery Date, name of the Customer, name of the Contact Person, Ship To and Bill To address, the pricing details, and so on.

Based on the details provided following documents gets generated in SAP Business One sequentially:

- 1. Item (Finished Good based on configuration selected)
- 2. OptiProERP Bill of Material
- 3. SAP Business One Bill of Material
- 4. Routing (if defined)
- 5. Sales Order/ Sales Quotation (based on selection)

ONOTE: You can start a new configuration by clicking the Start New Configuration button.



11.8 Print Options

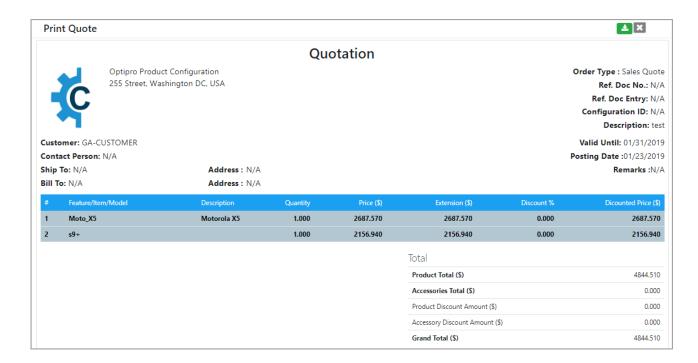
The Print Options available in the top right portion of the window enables you to print the **Summary** and the **Detail** associated with Model BOMs configured by you. These options can be used after configuring the Model BOM on the following tabs:

- 1. Model BOM To Configure Product
- 2. Verify the Selection and Accept
- 3. Final Document Creation

11.8.1 Procedure

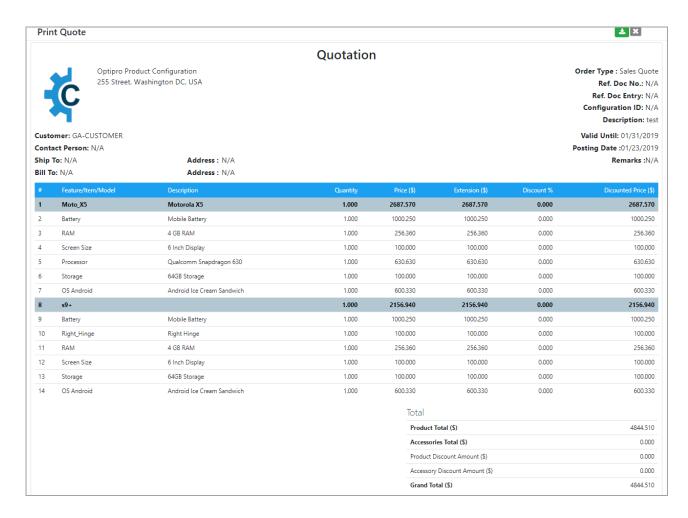
To Print the Summary:

- 1 Click the **Print Option** (Print Option) dropdown.
- 2 Select the option as Summary.
- 3 Click the **Print** icon ().
- 4 The summary associated with the Model BOMs will be displayed as shown in the following screen:



To Print the Detail:

- 1 Click the **Print Option** (Print Option) dropdown.
- 2 Select the option as **Detail.**
- 3 Click the **Print** icon ().
- 4 The complete details/ Sales Quotation associated with the Model BOMs gets displayed as shown in the following screen:



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