

# PRODUCT CONFIGURATOR

## User Manual

### Overview

A Product Configurator provides a method of producing unique product configurations based on customer specifications and pre-engineered sets of options and rules. This provides sales staff with an elegant and easy-to-use product configurator and a product engineer with a wealth of powerful and sophisticated tools to define the configuration process.

Product Configurator not only allows for easy selection of features and options but can also perform calculations and present specific choices based on parameters such as dimensions of a door opening entered by the user. Thus, when certain options are selected, additional or alternate options may be presented based on the engineering-defined rules and previously entered data.

*E.g.* Selecting a specified computer case may prevent accommodation of more than two expansion slots. As soon as the user selects the case type, the configurator calculates that only limited options are available with that case. The user is then presented with only those options, such as the choice of one or two expansion slots. This rigorous rule enforcement assures the customer as well as the production line that the product ordered is one that can be built as per the configuration.

Any manufacturing company that assembles or builds a standard product according to customer specifications (such as size, color, optional features, etc.) is a good candidate for Product Configurator. Product Configurator is an advanced 'rule-based' software application that makes or assembles unique products to customer specifications.

### Product Configurator – A Technology

Product Configurator allows a manufacturer to translate product engineering knowledge into rules that define relationships among product options, materials, and manufacturing processes. The collections of rules that relate to a specific product constitute a product Model. Once these Models are defined, even less experienced users can configure complex products. Configurations can be generated through engineering function, quoting function, or directly in sales order entry complete with costs and pricing. During the configuration process, pre-defined rules called Configuration Parameters are used to govern and guide the entry process and to prevent invalid combinations of options.

Overall features and capabilities include:

- Configured products are defined using a consolidated, integrated configuration management tool
- A friendly and elegant product configurator guides the operator through pre-defined option and quantity selections.
- A shorthand configuration entry code is supported that allows the experienced operator to select or enter a configuration in a fraction of the normal time.
- The configuration process checks the configuration and if found new then creates a unique item, bill of material.

- A set of unique costs and catalogue prices is created for each configuration. Descriptive information is also produced.
- Powerful functionalities for configuration rules define:
  - o Product model
  - o Product assembly
  - o Configuration parameters & Options of parameter
  - o Parameter dependency
  - o Rate & discount policy definition
- Product configurator is tightly integrated with Sales quotation and Sales order Process

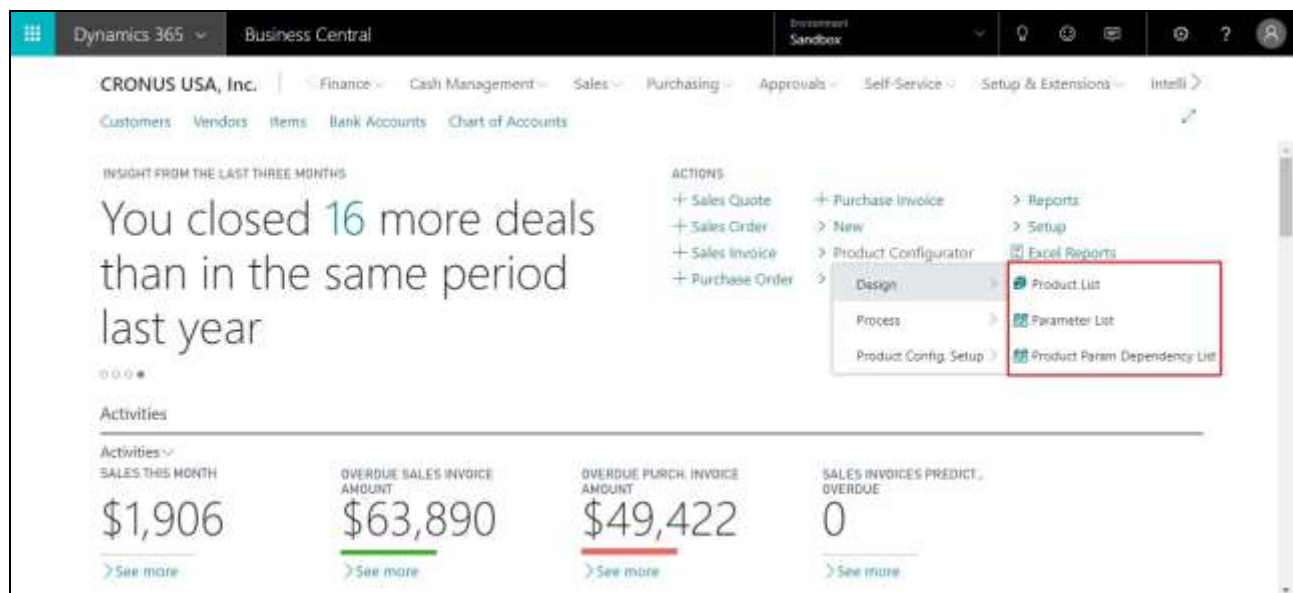
## Model Overview

Product configuration is an activity of customizing a product to meet the needs of a customer. With the help of this tool, a sales person can give exact quotation of customized product at a time without any help of engineering or other department. Also, he can check whether the customer's requirements are feasible or not.

Product configurators represent one of the most successful applications of artificial intelligence principles. The use of product configurators has resulted in many positive effects such as reduced lead times, fewer errors, shorter learning periods for new employees, etc. in engineering-oriented companies.

## Product Configurator – Functions & Features

Screen Shot 1



Screen Shot 2

**Dynamics 365 Business Central** | Environment: Sandbox

**CRONUS USA, Inc.** | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions | Intelli

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

**INSIGHT FROM LAST MONTH**

The best-selling item was **ATHENS Desk** with **18** units sold

**ACTIONS**

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Order
- + Purchase Invoice
- > New
- > Product Configurator
  - Design
  - Process
  - Product Config. Setup
- > Reports
- > Setup
- Excel Reports

**Product Configuration List**

**Activities**

Activities

SALES THIS MONTH	OVERDUE SALES INVOICE AMOUNT	OVERDUE PURCH. INVOICE AMOUNT	SALES INVOICES PREDICT. OVERDUE
\$1,906	\$63,890	\$49,422	0
<a href="#">See more</a>	<a href="#">See more</a>	<a href="#">See more</a>	<a href="#">See more</a>

Screen Shot 3

**Dynamics 365 Business Central** | Environment: Sandbox

**CRONUS USA, Inc.** | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions | Intelli

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

**INSIGHT FROM LAST MONTH**

Your top customer was **School of Fine Art**, bought for **\$23,102**

**ACTIONS**

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Order
- + Purchase Invoice
- > New
- > Product Configurator
  - Design
  - Process
  - Product Config. Setup
- > Reports
- > Setup
- Excel Reports

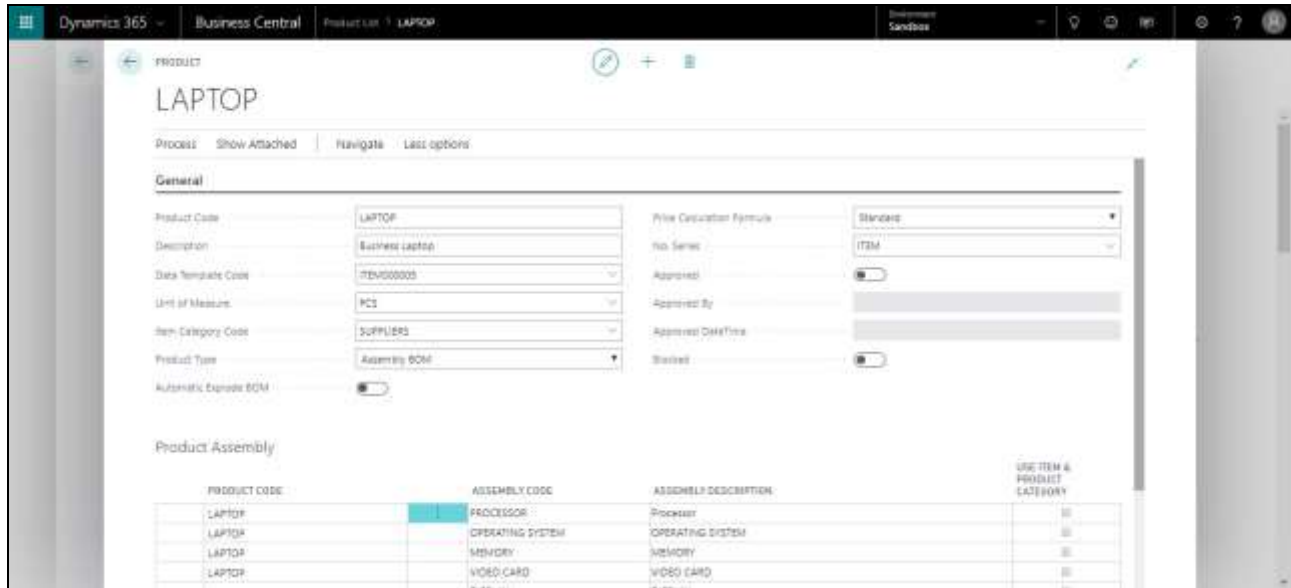
**Product Configurator Setup**

**Activities**

Activities

SALES THIS MONTH	OVERDUE SALES INVOICE AMOUNT	OVERDUE PURCH. INVOICE AMOUNT	SALES INVOICES PREDICT. OVERDUE
\$1,906	\$63,890	\$49,422	0
<a href="#">See more</a>	<a href="#">See more</a>	<a href="#">See more</a>	<a href="#">See more</a>

## Product List:

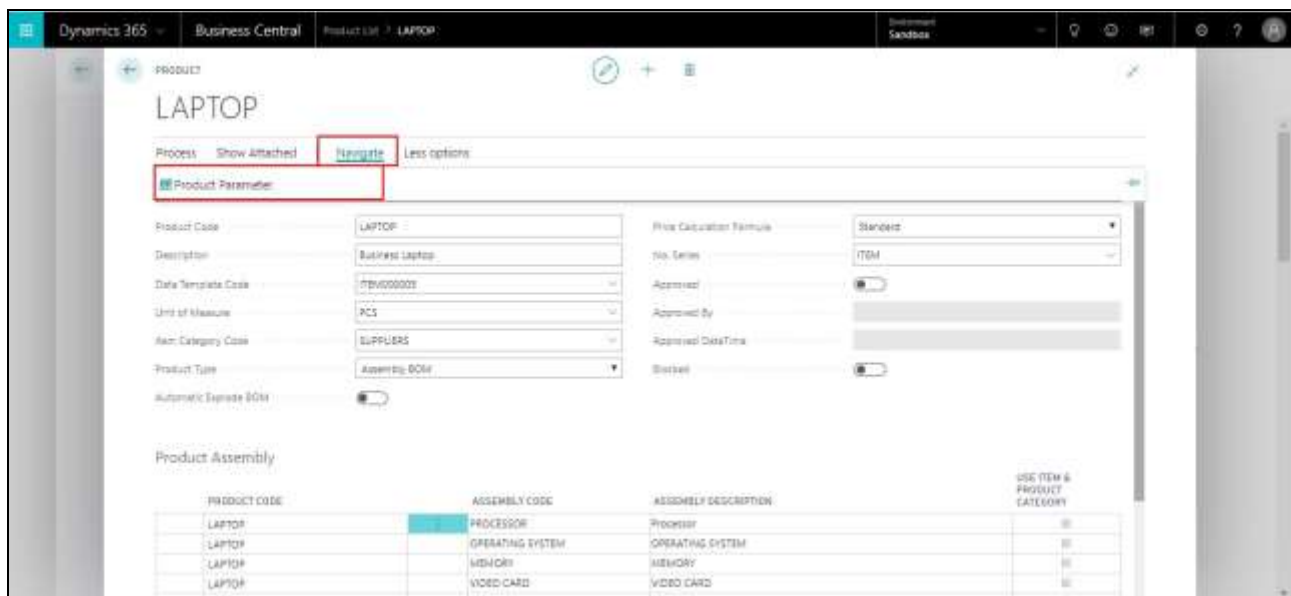


The screenshot shows the 'PRODUCT' form for 'LAPTOP' in Dynamics 365 Business Central. The form is divided into several sections:

- General:** Contains fields for Product Code (LAPTOP), Description (Business Laptop), Data Template Code (ITEM000005), Unit of Measure (PCS), Item Category Code (SUPPLIERS), Product Type (Assembly BOM), and Automatic Expand BOM (disabled). It also includes Price Calculation Formula (Standard), No. Series (ITEM), and checkboxes for Approved, Approved By, Approved DateTime, and Shipped.
- Product Assembly:** A table listing assemblies for the product.

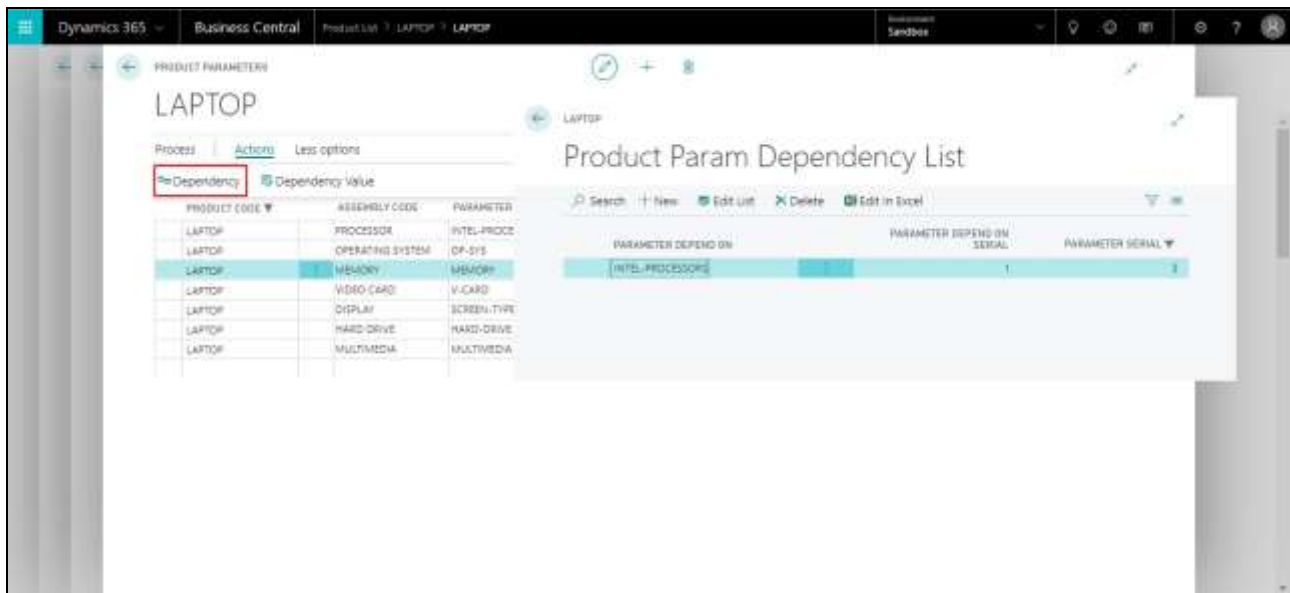
PRODUCT CODE	ASSEMBLY CODE	ASSEMBLY DESCRIPTION	USE ITEM & PRODUCT CATEGORY
LAPTOP	PROCESSOR	Processor	IS
LAPTOP	OPERATING SYSTEM	OPERATING SYSTEM	IS
LAPTOP	MEMORY	MEMORY	IS
LAPTOP	VIDEO CARD	VIDEO CARD	IS

In Product master, you can define your product models with major assemblies which require configuration to build a product.



This screenshot is identical to the one above, but with red annotations highlighting specific elements:

- A red box highlights the 'Navigate' button in the top navigation bar.
- A red box highlights the 'Product Parameter' link in the left sidebar.

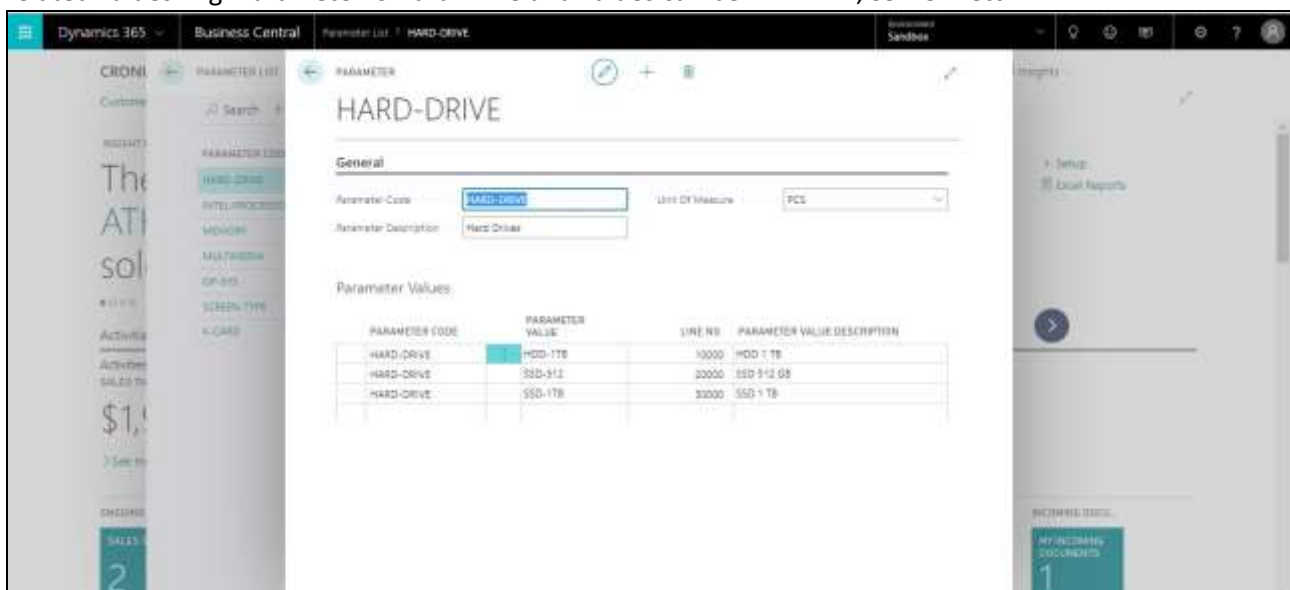


The screenshot shows the 'PRODUCT PARAMETERS' section for 'LAPTOP'. A red box highlights the 'No Dependency' button. The 'Product Param Dependency List' is displayed with the following data:

PRODUCT CODE	ASSEMBLY CODE	PARAMETER
LAPTOP	PROCESSOR	INTEL-PROCE
LAPTOP	OPERATING SYSTEM	OP-SYS
LAPTOP	MEMORY	MEMORY
LAPTOP	VIDEO CARD	V-CARD
LAPTOP	DISPLAY	SCREEN-TYPE
LAPTOP	HARD-DRIVE	HARD-DRIVE
LAPTOP	MULTIMEDIA	MULTIMEDIA

## Product Parameter

Product parameters are configurable values of product. In this function, you can define parameter and its related values. E.g. Parameter is Hard Drive and values can be HDD-1TB, SSD-512 etc.

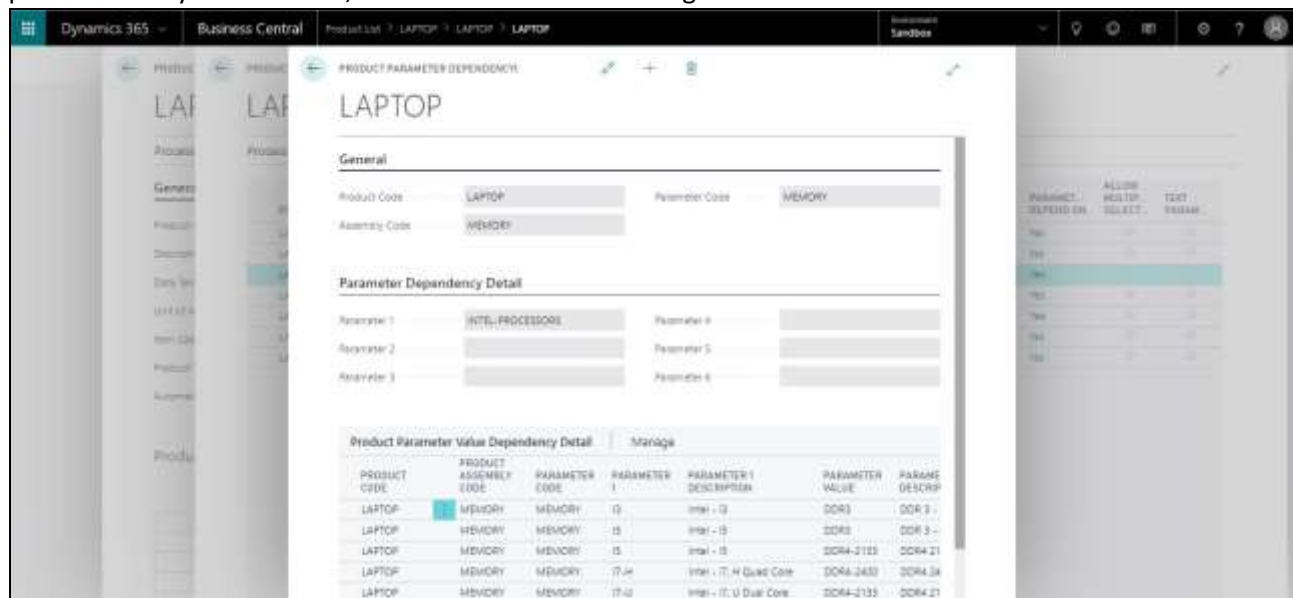


The screenshot shows the 'PARAMETER' configuration for 'HARD-DRIVE'. The 'General' section includes the 'Parameter Code' (HARD-DRIVE) and 'Unit of Measure' (PCS). The 'Parameter Values' section displays the following data:

PARAMETER CODE	PARAMETER VALUE	SERIAL NO.	PARAMETER VALUE DESCRIPTION
HARD-DRIVE	HDD-1TB	10000	HDD 1 TB
HARD-DRIVE	SSD-512	20000	SSD 512 GB
HARD-DRIVE	SSD-1TB	30000	SSD 1 TB

## Product Parameter Dependency:

Once product assembly and parameter value are defined, you can create value dependency between parameters. By this function, we can build rules for configuration

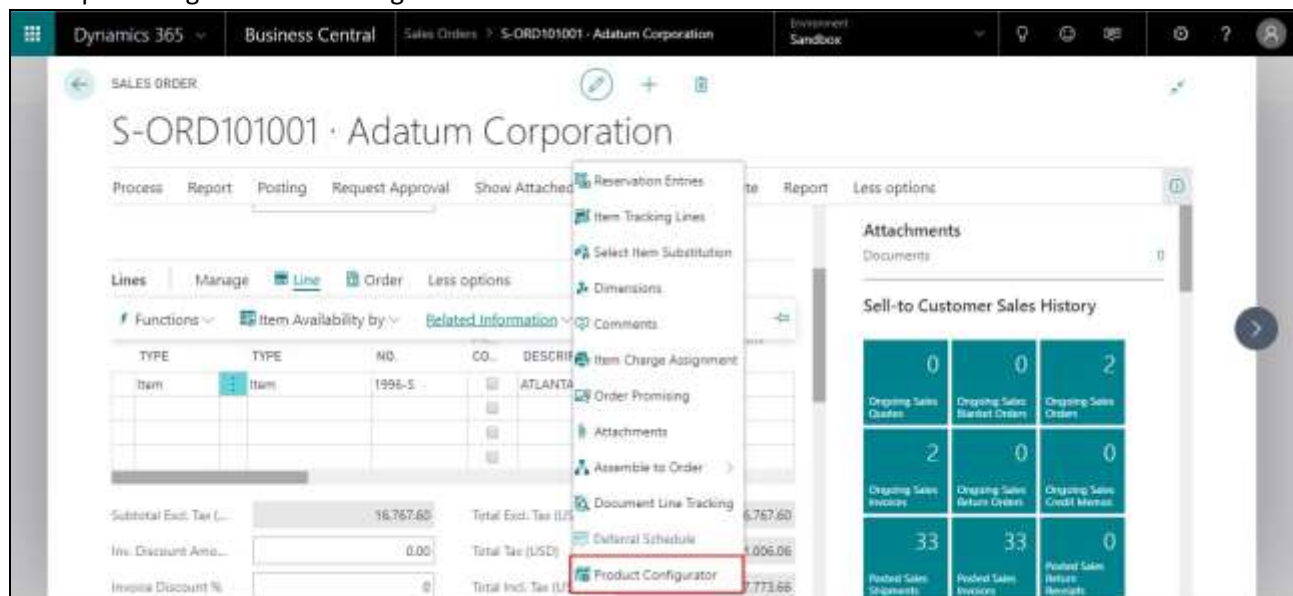


PRODUCT CODE	PRODUCT ASSEMBLY CODE	PARAMETER CODE	PARAMETER 1	PARAMETER 1 DESCRIPTION	PARAMETER VALUE	PARAMETER DESCRIPTION
LAPTOP	MEMORY	MEMORY	13	Intel - 13	DDR3	DDR 3 -
LAPTOP	MEMORY	MEMORY	15	Intel - 15	DDR3	DDR 3 -
LAPTOP	MEMORY	MEMORY	15	Intel - 15	DDR4-2133	DDR4 21
LAPTOP	MEMORY	MEMORY	17.4K	Intel - 17.4 Quad Core	DDR4-2400	DDR4 34
LAPTOP	MEMORY	MEMORY	17.4K	Intel - 17.4 Dual Core	DDR4-2133	DDR4 21

## Product Configuration:

### Integration with Sales Functions:

Product Configurator is also integrated with Sales functions like sales quotation and sales order to minimise order promising time and costing.

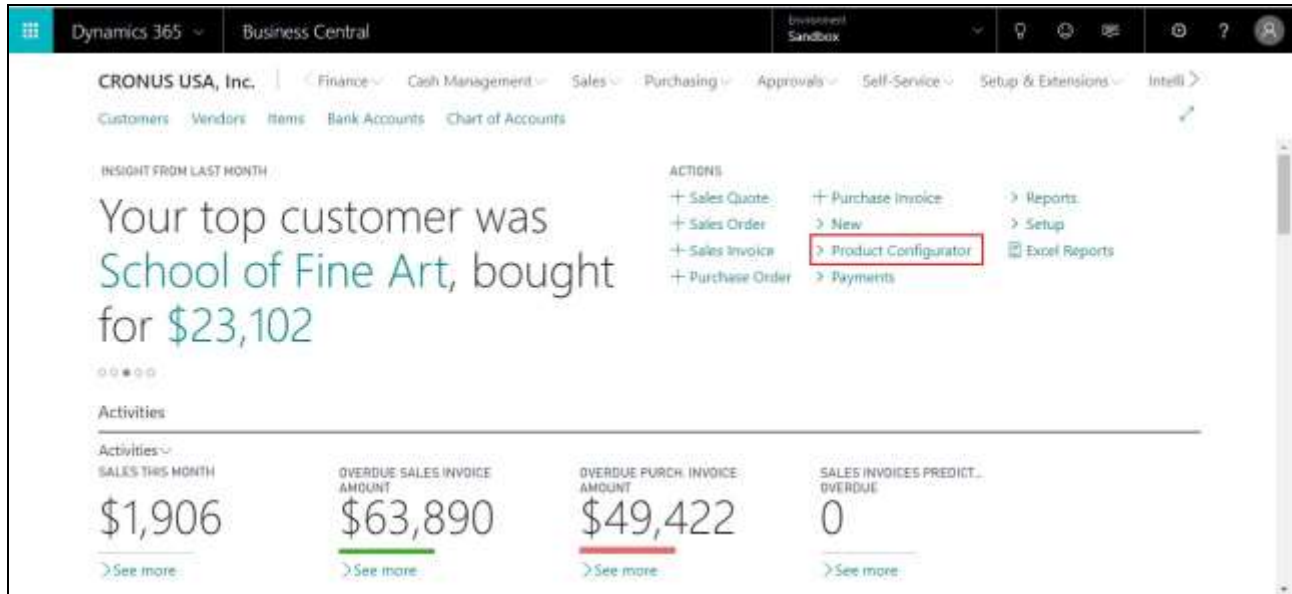


## How to use this solution

To leverage benefit from this solution, please follow below procedure.

- Download Product Configurator from AppSource.
- Import Product Configurator in your Dynamics 365 – Business Central instance.
- On Dynamics 365 Business Central mobile and tablet app, navigate to Home as shown in below screen.
- The main menu for the Product Configurator is shown marked in the Red Box in below Screen Shot.

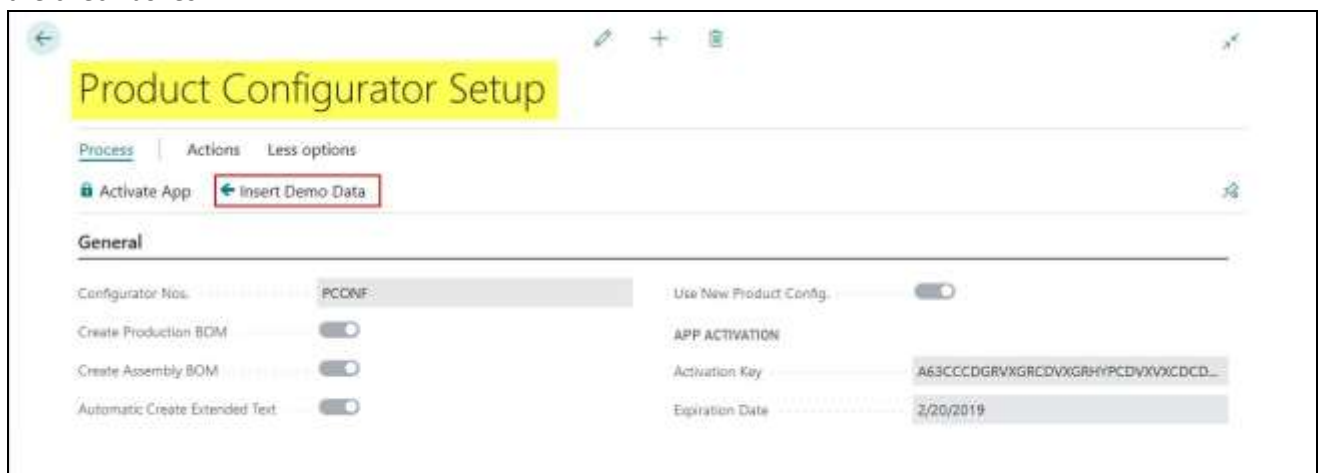
Screen Shot



## Insert Demo Data

If you want to generate the sample data automatically, navigate to the “Product Configurator Setup” page to import the Demo Data for the extension. (Otherwise follow the manual steps shown from the next page)

Selecting “Insert Demo Data” will open a request page by using which the User can import data by selecting the check boxes.



User have options to Create Setup, Create Items and Sample Product separately.



EDIT - INSERT PRODUCT CONFIGURATOR DEMO DATA

Options

Create Setup

Insert Items

Create Sample Product

Schedule... OK Cancel

**NOTE:** Once the above process is completed, user can skip points listed below and go to the step: [Use Product Configurator](#).

## Product Configurator Setup

Navigate to the Setup page to fill up the No. Series for the Product Configurator and set the other Flags as per the requirement.

Start by creating a new No. Series for the Product Configurator.

Search for “No. Series” in Business Central and Click New. Fill up the data as shown in Red Box Below.

Screen Shot

CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	DEFAULT NET.	MANUAL NET.	DATE ORDER
P-QUO	Purchase Quote	1001	2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-RCP	Purchase Receipt	100001	100000	5/16/2018	100200	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-RTOR	Purchase Return Order	1001	2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROD-CONF	Product Configuration - Sales	PROD-CONF-00001		4/9/2018	PROD-CONF-00001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
P-SHP	Product Purchase Shipment	100001	100000			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RES	Resource	00001	99999			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-SOL	Blanket Sales Order	1001	2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-CR	Sales Credit Memo	S-CR1001	S-CR2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-CR+	Posted Sales Credit Memo	PS-CR100001	PS-CR100000			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEG	Segment	0000001	0000000			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN	Finance Charge Memo	S-FIN1001	S-FIN10000			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-FIN+	Posted Finance Charge Memo	S-FIN100001	S-FIN100000			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-INV	Sales Invoice	S-INV100001	S-INV100000		S-INV100001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-INV+	Posted Sales Invoice	PS-INV100001	PS-INV100000	1/26/2018	PS-INV100014	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SH	Sh Numbering	000001	000000			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SHL	Sh Numbering	0000001	0000000			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-ORD	Sales Order	S-ORD101001	S-ORD100000		S-ORD101004	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-QUO	Sales Quote	S-QUO1001	S-QUO2999	4/9/2018	S-QUO1000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-REM	Reminder	S-REM1001	S-REM0999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-REM+	Posted Reminder	S-REM100001	S-REM100000			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-RTOR	Sales Return Order	S-RTOR1001	S-RTOR0000			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-SHP	Sales Shipment	S-SHP100001	S-SHP100000	1/26/2018	S-SHP100014	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TASK	Task	0000001	0000000			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
T-ORD	Transfer Order	1001	2999		1003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
T-RCP	Transfer Receipt	100001	1010000	4/1/2018	100001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Now, Selecting the newly created ‘PROD-CONF’ , go to Navigate -> Lines





NO. SERIES	Relationship	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNING NO.	INCREMENT BY	NO.	OPEN	SERIES	AUTHORIZED CODE	AUTHORIZED YEAR
P-GUO	Purchase Quote	1001	2999									
P-RCPE	Purchase Receipt	101001	100000	5/16/2018	101200							
P-RTORD	Purchase Return Order	1001	2999									
PROD-CONF	Product Configuration - Sales	PCONF-00001		4/9/2018	PCONF-00001							
P-SHPT	Posted Purchase Shipment	101001	100000									
RES	Resource	80000	80000									
S-BLK	Blanket Sales Order	1001	2000									
S-CR	Sales Credit Memo	S-CR1001	S-CR9999									
S-CR+	Posted Sales Credit Memo	PS-CR100001	PS-CR100000									
SGSM	Segment	1000001	1000000									

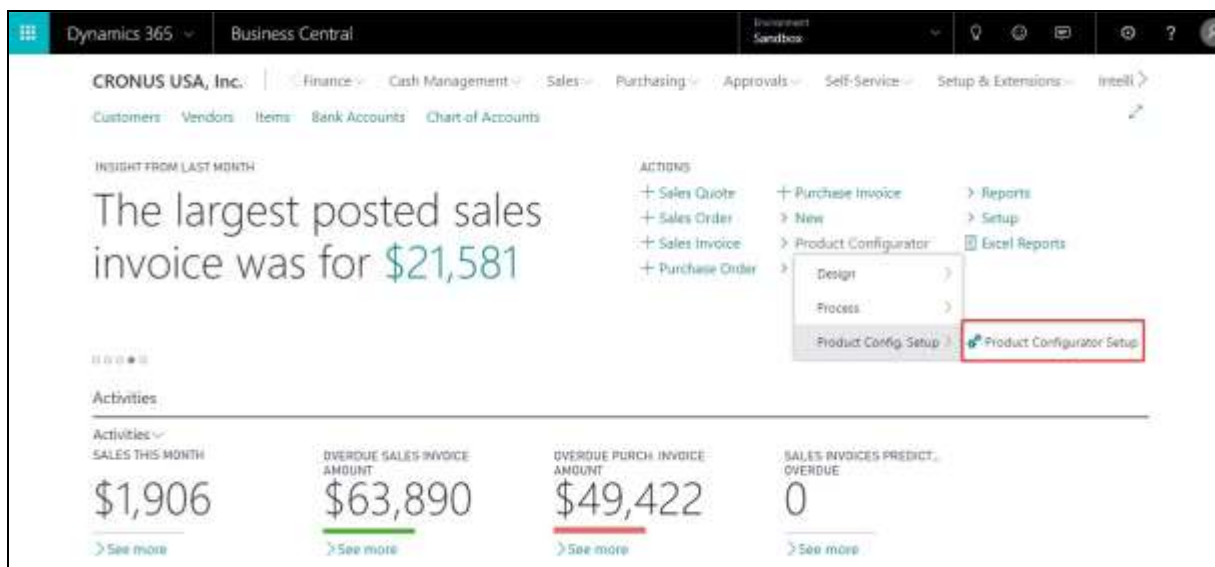
Fill up the Details as shown in Below image.



STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNING NO.	INCREMENT BY	NO.	OPEN	SERIES	AUTHORIZED CODE	AUTHORIZED YEAR
	PCONF-00001		4/9/2018	PCONF-00001							

Close the pages and go to Home -> Product Configurator.

Screen Shot 1



**CRONUS USA, Inc.** | Finance | Cash Management | Sales | Purchasing | Approvals | Self-Service | Setup & Extensions | Intelli

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

INSIGHT FROM LAST MONTH

The largest posted sales invoice was for **\$21,581**

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Order
- + Purchase Invoice
- + New
- + Product Configurator
- + Design
- + Process
- + Product Config. Setup
- + Reports
- + Setup
- + Excel Reports
- + Product Configurator Setup

Activities

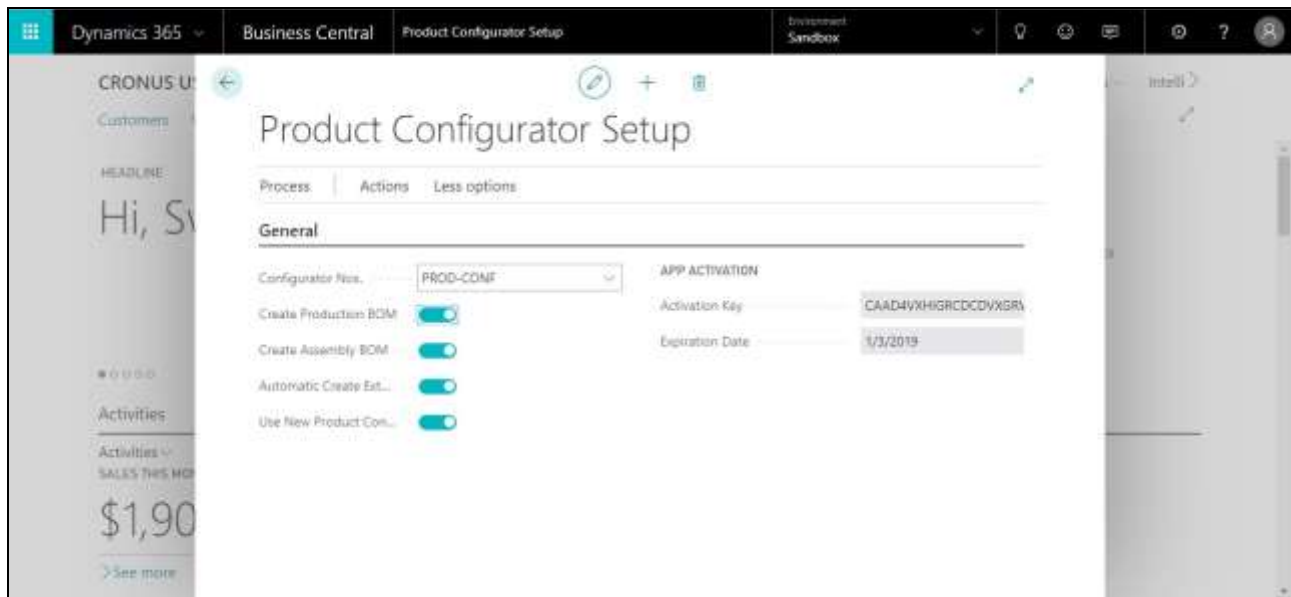
SALES THIS MONTH: **\$1,906** > See more

OVERDUE SALES INVOICE AMOUNT: **\$63,890** > See more

OVERDUE PURCH. INVOICE AMOUNT: **\$49,422** > See more

SALES INVOICES PREDICT. OVERDUE: **0** > See more

Screen Shot 2



Field	Description
Configuration Nos.	Specifies the code for the number series that will be used to assign numbers to product configurator.
Create Production BOM	Set to TRUE if you want to create Production BOM by system at the time of Item code generation by Product Configurator.
Create Assembly BOM	Set to TRUE if you want to create Assembly BOM by system at the time of Item code generation by Product Configurator.
Automatic Create Extended Text	Set to TRUE if you want to create the extended text of item's description automatically.
Use New Product Config.	Specifies whether to use the new product configurator or not.
Activation Key	Auto generated activation key when the App is installed.
Expiration Date	Specifies the expiration date of the app.

## Design

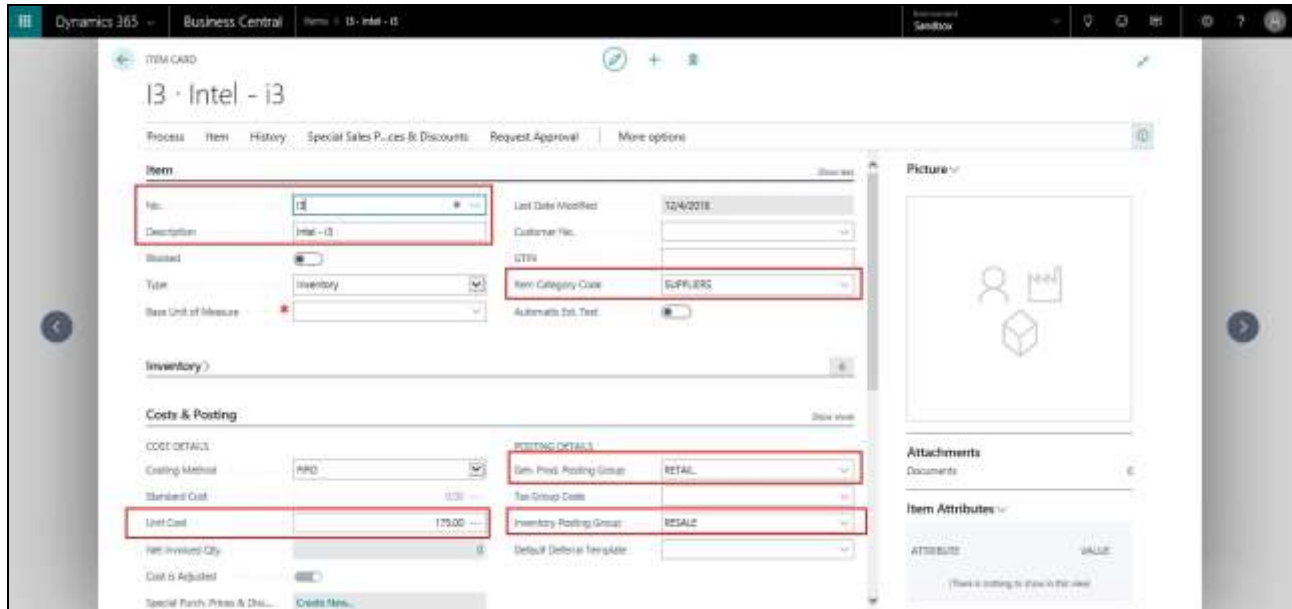
We will learn this topic by taking an example of selling a laptop. Our company manufactures the following items:

Sr. No.	Parameter	Parameter Values
1	Processor	I3, I5, I7-H, I7-U
2	Screen Type	156-FHD, 156-HD, 16-FHD, 16-HD
3	Memory	DDR3, DDR4-2133, DDR4-2400
4	Hard Drive	HDD-1TB, SSD-1TB, SSD-512
5	Graphics Card	G-620, G-630, NVIDIA-930
6	Operating System	NK-64-16, UB-16, W10-64-H, W10-64-P
7	Multimedia	HD-SPEAKER, DOLBY-SPEAKER

Items:

Create all the Item which will be available as a Parameter Value for the Product Configurator. Create all the items as shown in below Screen Shots.

Screen Shot1



**ITEM CARD**  
13 · Intel - i3

Process Item History Special Sales Prices & Discounts Request Approval More options

**Item**

Item No. 13  
Description Intel - i3  
Status On  
Type Inventory  
Base Unit of Measure  
Last Date Modified 12/4/2018  
Customer No.  
UTW  
Item Category Code SUPPLERS  
Automatic Toll Text

**Inventory**

**Costs & Posting**

**COST DETAILS**  
Costing Method FIFO  
Standard Cost 175.00  
Net Involved City  
Cost is Adjusted  
Special Sales Prices & Discounts Create New...

**POSTING DETAILS**  
Item Prod. Posting Group RETAIL  
Item Posting Group RESALE  
Default Deferral Template

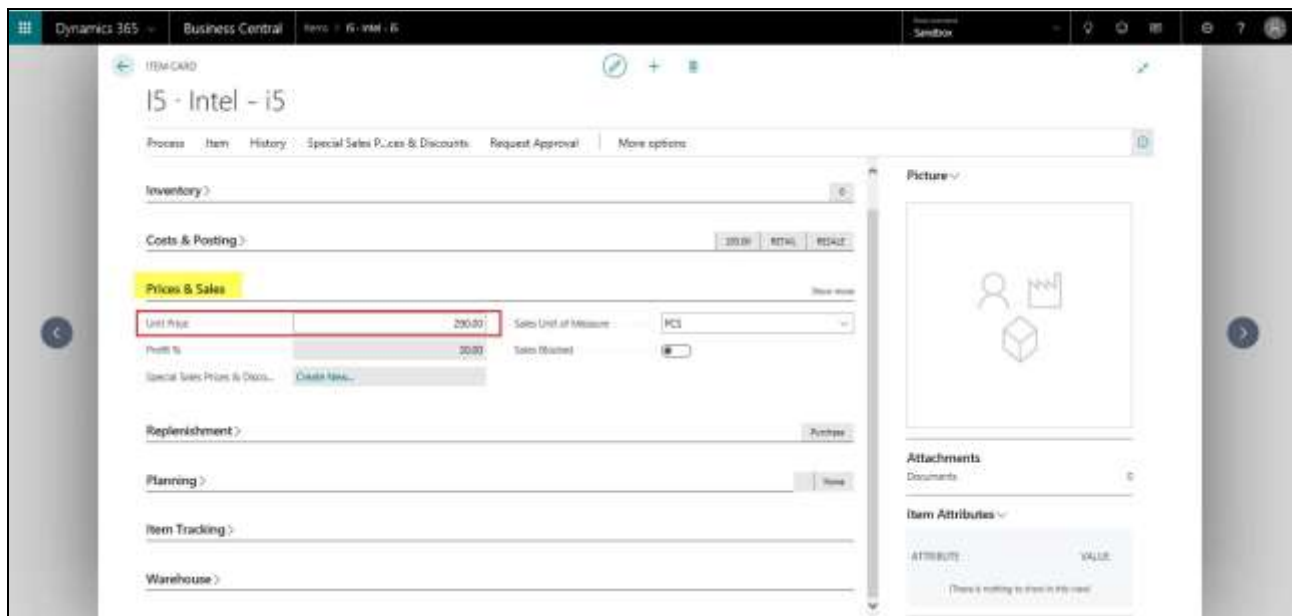
**Picture**

**Attachments**  
Documents

**Item Attributes**

ATTRIBUTE VALUE  
(There is nothing to show in this view)

Screen Shot 2



**ITEM CARD**  
15 · Intel - i5

Process Item History Special Sales Prices & Discounts Request Approval More options

**Inventory**

**Costs & Posting**

**Prices & Sales**

Unit Price 290.00  
Profit % 20.00  
Special Sales Prices & Discounts Create New...

Sales Unit of Measure PCS  
Sales Grouped

**Replenishment**

**Planning**

**Item Tracking**

**Warehouse**

**Picture**

**Attachments**  
Documents

**Item Attributes**

ATTRIBUTE VALUE  
(There is nothing to show in this view)

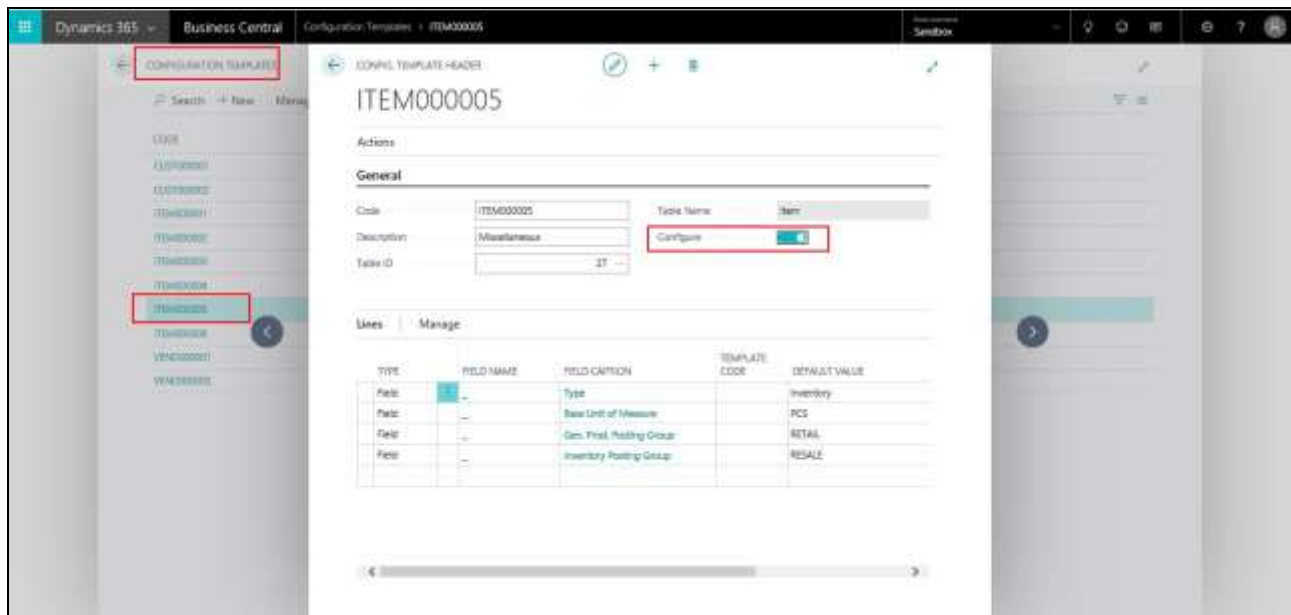
Similarly create below Items in Business Central.

No.	Description	Base Unit of Measure	Inventory Posting Group	Unit Price	Unit Cost	Gen. Prod. Posting Group	Item Category Code
156-FHD	15.6 inch Full HD Display	PCS	RESALE	80	56	RETAIL	SUPPLIERS

156-HD	15.6 inch HD Display	PCS	RESALE	100	70	RETAIL	SUPPLIERS
16-FHD	16 inch Full HD Display	PCS	RESALE	130	91	RETAIL	SUPPLIERS
16-HD	16 inch HD Display	PCS	RESALE	115	80.5	RETAIL	SUPPLIERS
DDR3	DDR 3 - 4 GB	PCS	RESALE	25	17.5	RETAIL	SUPPLIERS
DDR4-2133	DDR4 2133 MHz - 8 GB	PCS	RESALE	45	31.5	RETAIL	SUPPLIERS
DDR4-2400	DDR4 2400 MHz - 8 GB (H Quad Core Processor)	PCS	RESALE	60	42	RETAIL	SUPPLIERS
DOLBY-SPEAKER	High Quality Dolby Speakers 10W	PCS	RESALE	50	35	RETAIL	SUPPLIERS
G-620	Intel ® HD Graphics 620	PCS	RESALE	30	21	RETAIL	SUPPLIERS
G-630	Intel ® HD Graphics 630 (H Quad Core Processor)	PCS	RESALE	50	35	RETAIL	SUPPLIERS
HDD 1 TB	HDD 1 TB	PCS	RESALE	180	126	RETAIL	SUPPLIERS
HD-SPEAKER	High Definition Speakers 5W	PCS	RESALE	100	70	RETAIL	SUPPLIERS
I3	Intel - i3	PCS	RESALE	250	175	RETAIL	SUPPLIERS
I5	Intel - i5	PCS	RESALE	290	203	RETAIL	SUPPLIERS
I7-H	Intel - i7, H Quad Core	PCS	RESALE	370	259	RETAIL	SUPPLIERS
I7-U	Intel - i7, U Dual Core	PCS	RESALE	450	315	RETAIL	SUPPLIERS
NK-64-16	NeoKylin 6.0 64 bit	PCS	RESALE	20	14	RETAIL	SUPPLIERS
NVIDIA-930	NVIDIA ® GeForce 930MX 64 Bit	PCS	RESALE	80	56	RETAIL	SUPPLIERS
SSD-1TB	SSD 1 TB	PCS	RESALE	270	189	RETAIL	SUPPLIERS
SSD-512	SSD 512 GB	PCS	RESALE	200	140	RETAIL	SUPPLIERS
UB-16	Ubuntu 16.04 LTS 64-bit	PCS	RESALE	50	35	RETAIL	SUPPLIERS
W10-64-H	Windows 10 Home 64 bit	PCS	RESALE	80	56	RETAIL	SUPPLIERS
W10-64-P	Windows 10 Pro 64 bit	PCS	RESALE	100	70	RETAIL	SUPPLIERS

### Configuration Templates:

Search for Configurations Templates and Go to 'ITEM000005' (you can create new or select any other as per your choice). Now, set the flag "Configure" to TRUE as shown in below Screen Shot.



## Define Parameters

Parameter value: Items we manufacture individually

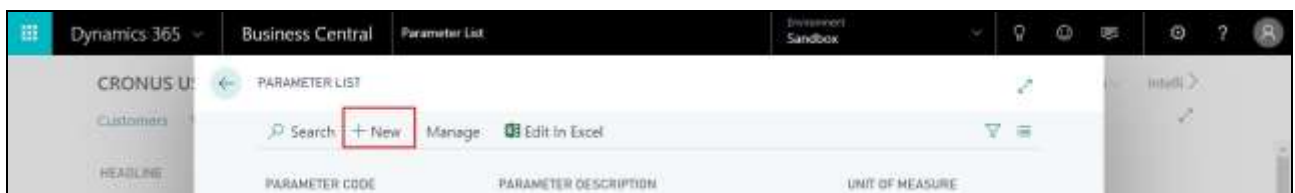
All these parameter values are assembly items for our main product - Laptop.

In Business Central, first we must define the parameters and their values. Then we must make product and its assembly code and for each assembly code, we must define its parameter.

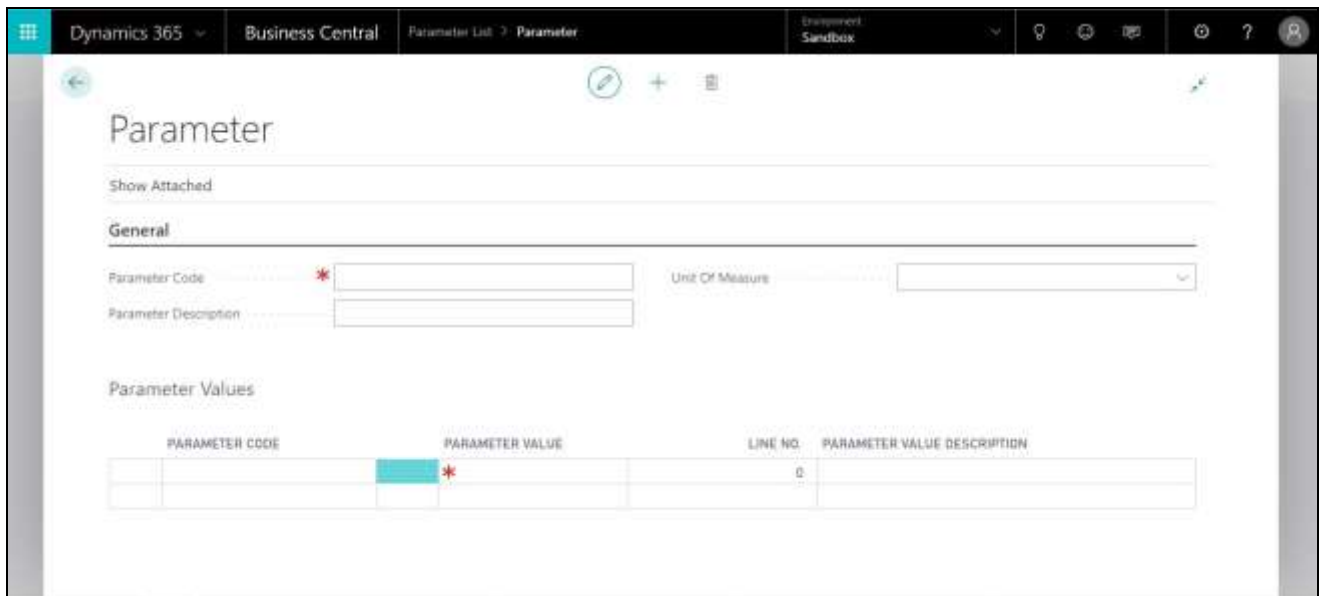
Limitation: If a customer chooses Processor I3, we can give him a monitor with 12.5 inches screen only and not with 14 inches or 15.6 inches Screen. So, monitor selection is dependent on Processor. We can do this thing from setting dependency value of parameter. In this way, we must design our product configurator. Then we can use it from sales quote or sales order.

To define parameter, follow below steps.

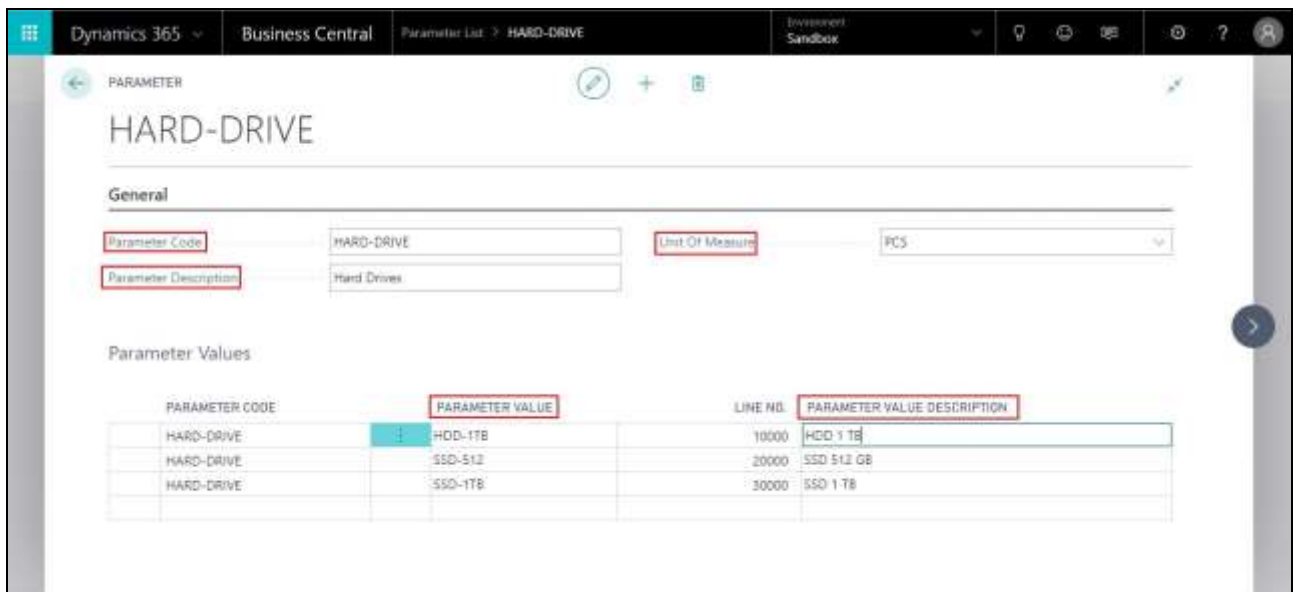
Step 1: Open 'Parameter List' by the following path: Home/Product Configurator/Design/Parameter List. Click on New.



Step 2: In the Parameter Card page, enter the Parameter and Parameter Values as mentioned in table below.



- In 'Parameter Code' field, enter HARD DRIVE
- In 'Parameter Description' field, enter Hard Drives
- In 'Unit of Measure' field, enter PCS
- In 'Parameter Value' field, enter HDD-1TB
- In 'Parameter Description' field, enter 'HDD 1 TB'
- Enter all the parameters and description one by one as per below screen shot



Step 3: Click on OK. Here we created a parameter and value for HARD DRIVE.

Similarly, create code for another parameter as follows:

## Create Parameter and Value for Screen

**Dynamics 365 Business Central** | Parameter List > SCREEN-TYPE | Environment: Sandbox

**PARAMETER**

### SCREEN-TYPE

**General**

Parameter Code:  Unit Of Measure:

Parameter Description:

**Parameter Values**

PARAMETER CODE	PARAMETER VALUE	LINE NO.	PARAMETER VALUE DESCRIPTION
SCREEN-TYPE	156-HD	10000	15.6 inch HD Display
SCREEN-TYPE	156-FHD	20000	15.6 inch Full HD Display
SCREEN-TYPE	16-HD	30000	16 inch HD Display
SCREEN-TYPE	16-FHD	40000	16 inch Full HD Display

## Create Parameter and Value for Memory

**Dynamics 365 Business Central** | Parameter List > MEMORY | Environment: Sandbox

**PARAMETER**

### MEMORY

**General**

Parameter Code:  Unit Of Measure:

Parameter Description:

**Parameter Values**

PARAMETER CODE	PARAMETER VALUE	LINE NO.	PARAMETER VALUE DESCRIPTION
MEMORY	DDR3	10000	DDR 3 - 4 GB
MEMORY	DDR4-2133	20000	DDR4 2133 MHz - 8 GB
MEMORY	DDR4-2400	30000	DDR4 2400 MHz - 8 GB (H Quad Core Processor)

## Create Parameter and Value for Processors



**Dynamics 365 Business Central** | Parameter List > INTEL-PROCESSORS | Environment: Sandbox

## PARAMETER INTEL-PROCESSORS

**General**

Parameter Code:  Unit Of Measure:

Parameter Description:

**Parameter Values**

PARAMETER CODE	PARAMETER VALUE	LINE NO.	PARAMETER VALUE DESCRIPTION
INTEL-PROCESSORS	I3	10000	Intel - i3
INTEL-PROCESSORS	I5	20000	Intel - i5
INTEL-PROCESSORS	I7-U	30000	Intel - i7, U Dual Core
INTEL-PROCESSORS	I7-H	40000	Intel - i7, H Quad Core

Create Parameter and Value for Multimedia

**Dynamics 365 Business Central** | Parameter List > MULTIMEDIA | Environment: Sandbox

## PARAMETER MULTIMEDIA

**General**

Parameter Code:  Unit Of Measure:

Parameter Description:

**Parameter Values**

PARAMETER CODE	PARAMETER VALUE	LINE NO.	PARAMETER VALUE DESCRIPTION
MULTIMEDIA	HD-SPEAKER	10000	High Definition Speakers 5W
MULTIMEDIA	DOLBY-SPEAKER	20000	High Quality Dolby Speakers 10W

Create Parameter and Value for Operating System

Dynamics 365 Business Central Parameter List > OP-SYS Environment Sandbox

PARAMETER

## OP-SYS

**General**

Parameter Code:  Unit Of Measure:

Parameter Description:

**Parameter Values**

PARAMETER CODE	PARAMETER VALUE	LINE NO.	PARAMETER VALUE DESCRIPTION
OP-SYS	W10-64-F	10000	Windows 10 Pro 64 bit
OP-SYS	W10-64-H	20000	Windows 10 Home 64 bit
OP-SYS	UB-16	30000	Ubuntu 16.04 LTS 64-bit
OP-SYS	NK-64-16	40000	Neoflyn 6.0 64 bit

Create Parameter and Value for Graphics Card

Dynamics 365 Business Central Parameter List > V-CARD Environment Sandbox

PARAMETER

## V-CARD

**General**

Parameter Code:  Unit Of Measure:

Parameter Description:

**Parameter Values**

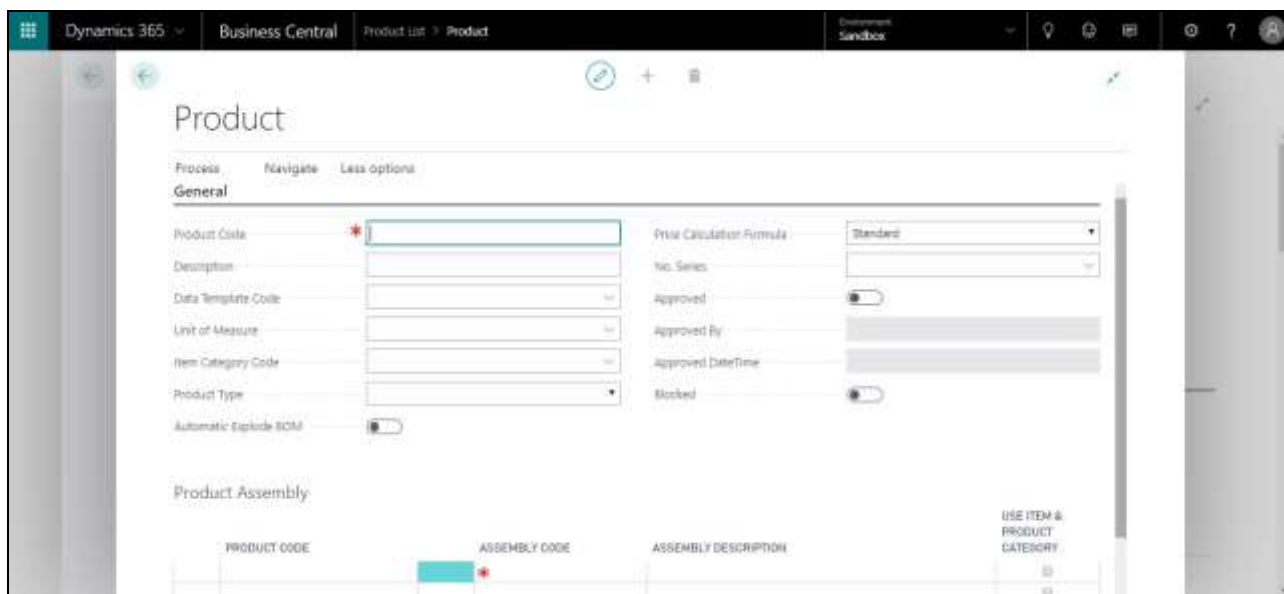
PARAMETER CODE	PARAMETER VALUE	LINE NO.	PARAMETER VALUE DESCRIPTION
V-CARD	G-620	10000	Intel® HD Graphics 620
V-CARD	G-630	20000	Intel® HD Graphics 630 (H Quad Core Processor)
V-CARD	NVIDIA-930	30000	NVIDIA® GeForce 930MX 64 Bit

All parameters are set. Now we must define a product & its assembly code.

## Create Product

Step 1: Open Product list page by the following path: Home/Product Configurator/Design/Product List

Step 2: Click on 'New'

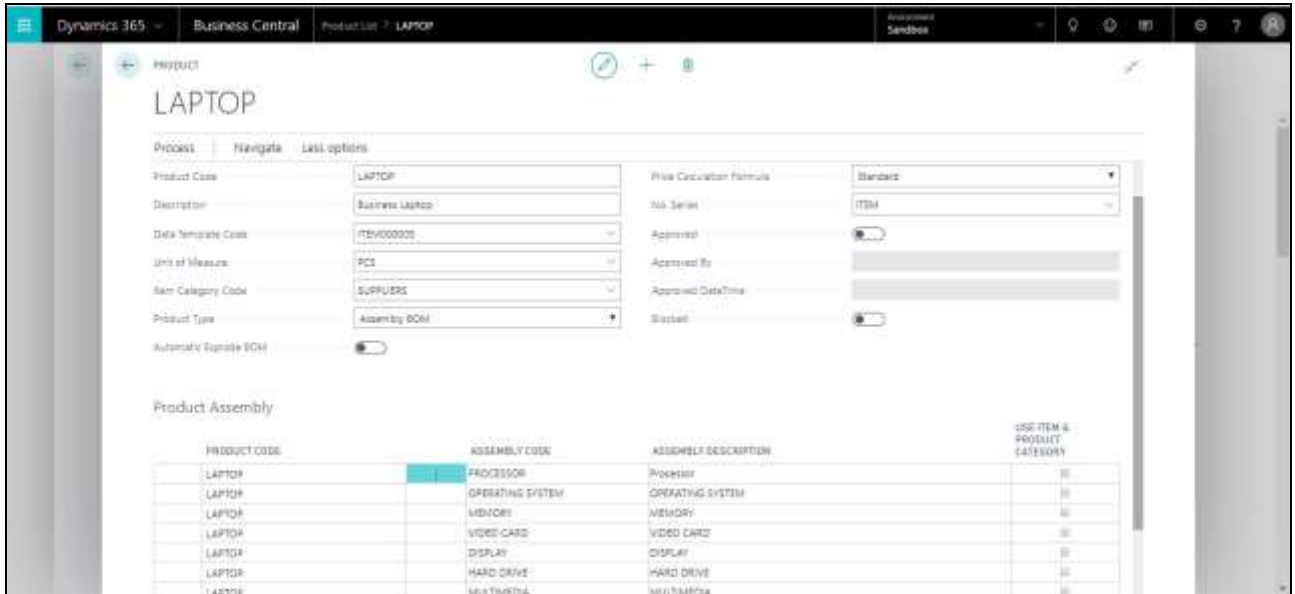


The purpose of each field is described in the table given below:

Field	Description
<b>General Tab</b>	
Product Code	Code of for the Product
Description	Description of Product
Data Template Code	Item template code which will be applied on item that will be generated by Product Configurator. NOTE: The template code must have flag "Configure" TRUE.
Unit of Measure	UOM for Product
Item Category Code	Item category code of Product
Product Type	Specify if the Product Type is Assembly BOM or Production BOM
Automatic Explode BOM	Set to TRUE if automatically Explode BOM
Price Calculation Formula	There are two options to select from: Standard: Configurator will consider assembly item's standard price (without discount) Discounted: Configurator will consider assembly item's discounted price, if available.
No Series	Number series for product
Approved	By setting this check box to TRUE, you can take this product configurator in use.
Approved By	Name of the Approver.
Approved DateTime	Date and Time of the Approval
Blocked	If the Blocked flag is set to FALSE, the configurator will no longer be in use.
<b>Product Assembly</b>	

Assembly Code	Define Assembly code for Product (can be called the top level BOM for Product)
Assembly Description	Define Assembly Code's Description.

The Product card will look like below screen shot



The screenshot shows the 'PRODUCT' card for 'LAPTOP' in Dynamics 365 Business Central. The card is divided into two main sections: 'Product Information' and 'Product Assembly'.

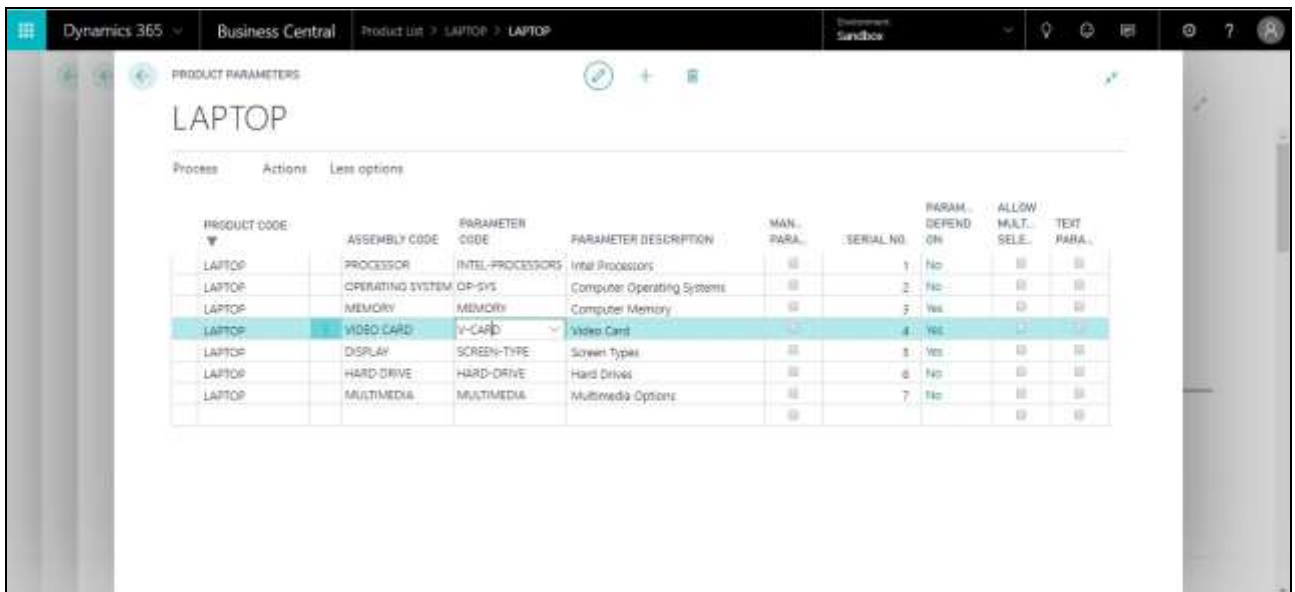
**Product Information:**

- Product Code: LAPTOP
- Description: Business Laptop
- Data Template Code: ITEM000002
- Unit of Measure: PCS
- Item Category Code: SUPPLERS
- Product Type: Assembly BOM
- Automatic Explode BOM: ☐
- Price Calculation Formula: Standard
- Item Series: ITEM
- Approved: ☐
- Approved By:
- Approved DateTime:
- Blocked: ☐

**Product Assembly:**

PRODUCT CODE	ASSEMBLY CODE	ASSEMBLY DESCRIPTION	ITEM & PRODUCT CATEGORY
LAPTOP	PROCESSOR	Processor	IS
LAPTOP	OPERATING SYSTEM	OPERATING SYSTEM	IS
LAPTOP	MEMORY	MEMORY	IS
LAPTOP	VIDEO CARD	VIDEO CARD	IS
LAPTOP	DISPLAY	DISPLAY	IS
LAPTOP	HARD DRIVE	HARD DRIVE	IS
LAPTOP	MULTIMEDIA	MULTIMEDIA	IS

Step 3: Click on 'Product Parameter'. Select the Assembly Code and the Parameter Code to fill up the Product Parameters.



The screenshot shows the 'PRODUCT PARAMETERS' card for 'LAPTOP' in Dynamics 365 Business Central. The card displays a table of parameters for the 'LAPTOP' product.

PRODUCT CODE	ASSEMBLY CODE	PARAMETER CODE	PARAMETER DESCRIPTION	MAN. PARA.	SERIAL NO.	PARAM. DEPEND. ON	ALLOW MULT. SELE.	TEXT PARA.
LAPTOP	PROCESSOR	INTEL-PROCESSORS	Intel Processors	IS	1	No	IS	IS
LAPTOP	OPERATING SYSTEM	OP-SYS	Computer Operating Systems	IS	2	No	IS	IS
LAPTOP	MEMORY	MEMORY	Computer Memory	IS	3	Yes	IS	IS
LAPTOP	VIDEO CARD	V-CARD	Video Card	IS	4	Yes	IS	IS
LAPTOP	DISPLAY	SCREEN-TYPE	Screen Types	IS	5	Yes	IS	IS
LAPTOP	HARD DRIVE	HARD-DRIVE	Hard Drives	IS	6	No	IS	IS
LAPTOP	MULTIMEDIA	MULTIMEDIA	Multimedia Options	IS	7	No	IS	IS

In 'Assembly Code' field, select assembly code whose sequence is first. **Assembly codes are to be entered in ascending order.** Here for Laptop configuration, what Processor the customer wants must be defined first. So here we will enter 'PROCESSOR' first in "Assembly Code".

In 'Parameter Code' field select Parameter code which is suitable for a assembly code. e.g. For the assembly code "PROCESSOR", we have selected the "INTEL PROEessor" as parameter Code. On selection of parameter code 'Parameter Description' will get updated automatically.

Set the Mandatory Parameter to TRUE if the selection of value for "Assembly Code" is mandatory when configuring the Product.

Note that the Serial no. will update automatically. If the parameter is dependent on another parameter, the "Parameter Depend On" will show Yes.

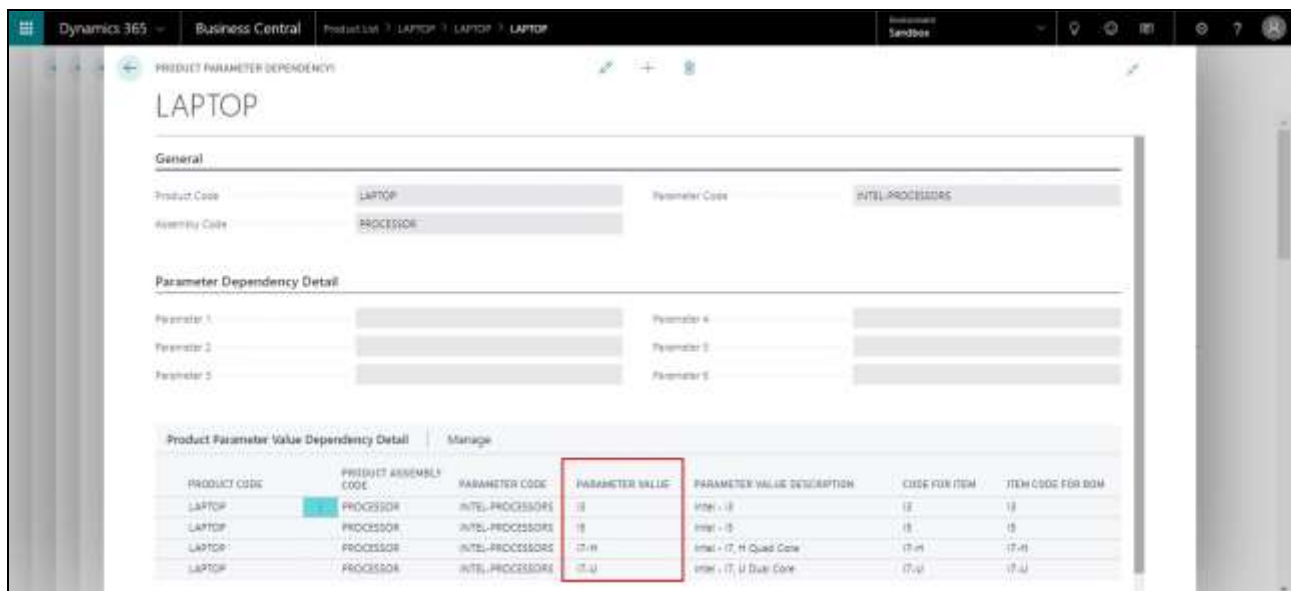
## Establish Dependency of Parameters

In the above case, Processor selection comes first in the hierarchy, so customer can select any processor as he wants. Screen size selection comes second in the hierarchy and there is a limitation that if a customer selects I3 Processor, he should be given a monitor with 15.6 Inches screen only. If he selects I5 processor then he can select a monitor with screen size 16 inches and so on. We need to set this up as follows:

Step 1: Select first line of Processor.

Step 2: Since PROCESSOR is independent of any parameter, there is no need to set Dependency, but we must set dependency value with no one. So, click on Process \ 'Dependency Value'.

Step 3: Select 'Parameter Value', I3, I5, &I7 one by one as shown below:

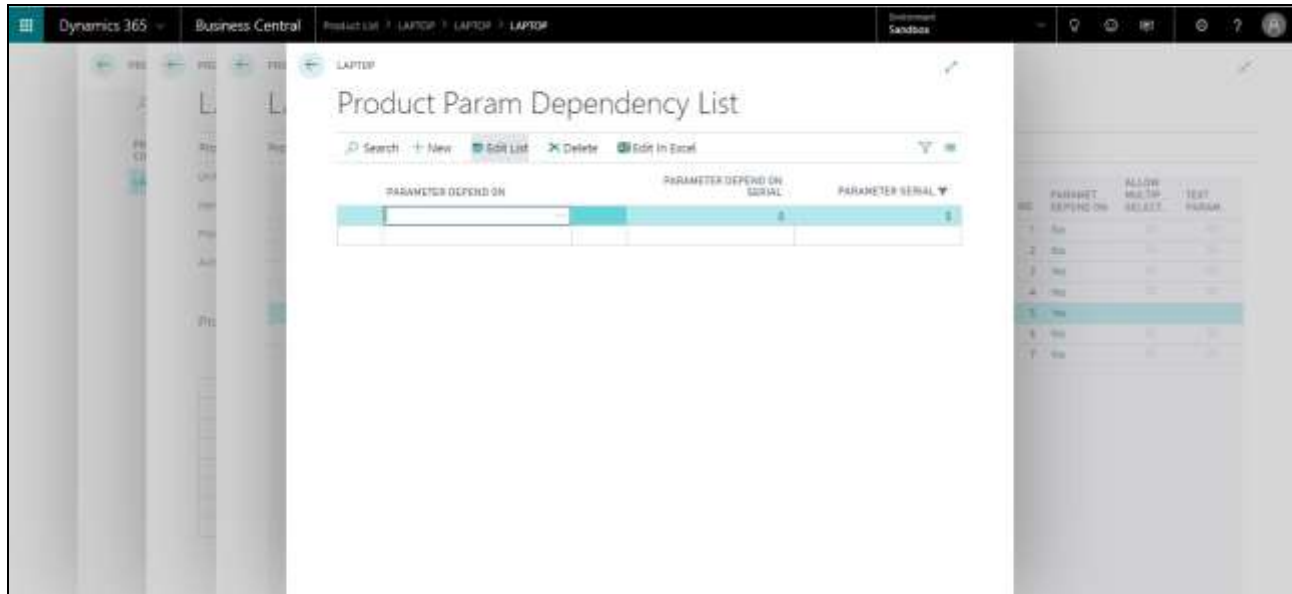


PRODUCT CODE	PRODUCT ASSEMBLY CODE	PARAMETER CODE	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	CODE FOR ITEM	ITEM CODE FOR BOM
LAPTOP	PROCESSOR	INTEL-PROCESSORS	I3	Intel - I3	I3	I3
LAPTOP	PROCESSOR	INTEL-PROCESSORS	I5	Intel - I5	I5	I5
LAPTOP	PROCESSOR	INTEL-PROCESSORS	I7-H	Intel - I7, H Quad Core	I7-H	I7-H
LAPTOP	PROCESSOR	INTEL-PROCESSORS	I7-U	Intel - I7, U Dual Core	I7-U	I7-U

Step 4: Code for Item' field will update as per parameter value, and it will become a character/digit of item code.

Step 5: Select the line which contains Assembly Code SCREEN TYPE. Go to Process \ Dependency from the ribbon.

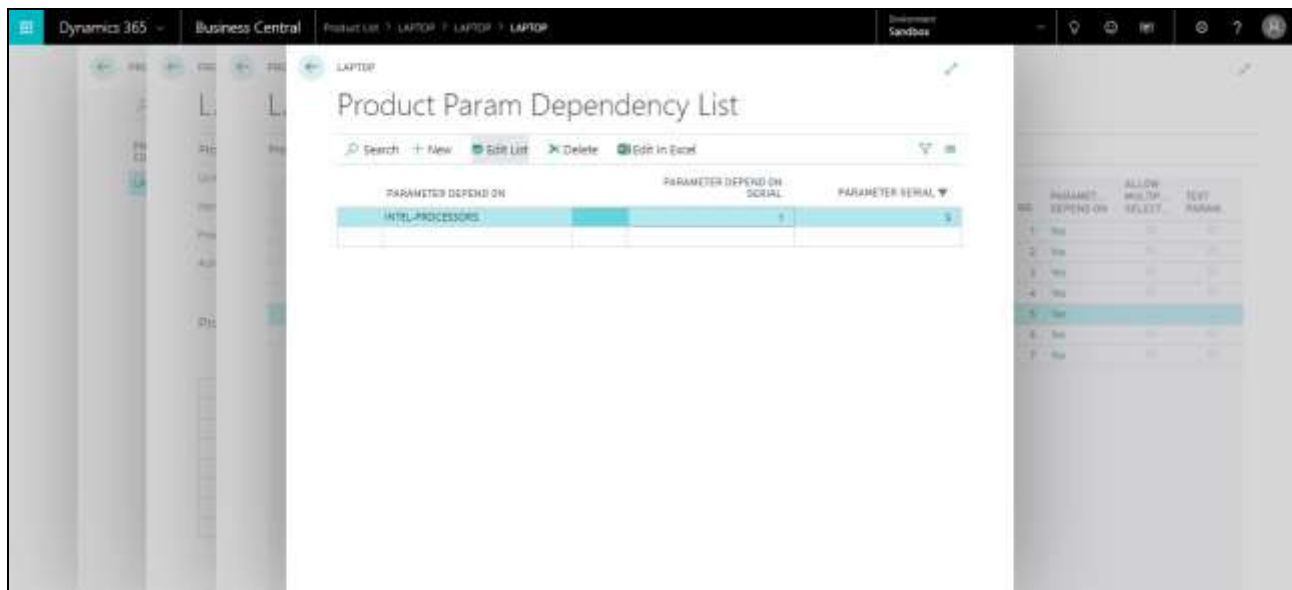
Note that the field "Parameter Serial Field" will be automatically filled with the value from the Parameter Serial No field.



Step 6: As the computer memory is dependent on the Processor, select the “INTEL-PROCESSOR” in the parameter Depend On field.

As you define ‘Parameter Depend On’ field, ‘Parameter Depend on Serial’ will get updated as per the serial number of ‘Processor’.

You can also set Multi Dependency for one parameter.



Step 7: Confirm that the line of ‘SCREEN TYPE’ is still selected and click on Process \ Dependency Value.

If Processor I3 is selected, then Customer can select 12.5 inches screen

If selected Processor I7, then Customer can select 15.6 inches screen

Step 8: Similarly, set the Dependency and Dependency value for parameter Memory

Go to Actions \ Dependency \ New

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Dynamics 365', 'Business Central', and a breadcrumb trail: 'Product List > LAPTOP > LAPTOP > LAPTOP'. The 'Environment' is set to 'Sandbox'. The main title is 'Product Param Dependency List'. Below the title is a toolbar with 'Search', '+ New', 'Edit List', 'Delete', and 'Edit In Excel'. A table displays the dependency list with columns: 'PARAMETER DEPEND ON', 'PARAMETER DEPEND ON SERIAL', and 'PARAMETER SERIAL'. The first row shows 'INTEL PROCESSORS' as the parameter it depends on, with a dependency serial of '1' and a parameter serial of '3'.

PARAMETER DEPEND ON	PARAMETER DEPEND ON SERIAL	PARAMETER SERIAL
INTEL PROCESSORS	1	3



Make sure that the MEMORY Line on the parameter list is still selected and Go to Actions \ Dependency Value. Fill up the dependency values as shown in below screen shot.

PRODUCT PARAMETER DEPENDENCY

LAPTOP

Parameter 1: INTEL-PROCESSORS Parameter 4: Parameter 5: Parameter 6:

Product Parameter Value Dependency Detail				Manage				
PRODUCT CODE	PRODUCT ASSEMBLY CODE	PARAMETER CODE	PARAMETER 1	PARAMETER 1 DESCRIPTION	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	CODE FOR ITEM	ITEM CODE FOR BOM
LAPTOP	MEMORY	MEMORY	I3	Intel - i3	DDR3	DDR3 - 4 GB	DDR3	DDR3
LAPTOP	MEMORY	MEMORY	I5	Intel - i5	DDR3	DDR3 - 4 GB	DDR3	DDR3
LAPTOP	MEMORY	MEMORY	I5	Intel - i5	DDR4-2133	DDR4-2133 MHz - 8 GB	DDR4-	DDR4-2133
LAPTOP	MEMORY	MEMORY	I7-H	Intel - i7, H Quad Core	DDR4-2400	DDR4-2400 MHz - 8 GB (H...	DDR4-	DDR4-2400
LAPTOP	MEMORY	MEMORY	I7-U	Intel - i7, U Dual Core	DDR4-2133	DDR4-2133 MHz - 8 GB	DDR4-	DDR4-2133

Step 9: Similarly, set the Dependency and Dependency value for parameter VIDEO CARD

Go to Actions \ Dependency \ New

Dynamics 365 Business Central Product List > LAPTOP > LAPTOP > LAPTOP Development Sandbox

LAPTOP

Product Param Dependency List

Search + New Edit List Delete Edit In Excel

PARAMETER DEPEND ON	PARAMETER DEPEND ON SERIAL	PARAMETER SERIAL
INTEL-PROCESSORS	I	4

Make sure that the VIDEO CARD Line on the parameter list is still selected and Go to Actions \ Dependency Value. Fill up the dependency values as shown in below screen shot.

Dynamics 365 Business Central Product List > LAPTOP > LAPTOP > LAPTOP Environment Sandbox

PRODUCT PARAMETER DEPENDENCY

LAPTOP

Parameter 1: INTEL-PROCESSORS  
Parameter 2:   
Parameter 3:   
Parameter 4:   
Parameter 5:   
Parameter 6:

Product Parameter Value Dependency Detail							Manage	
PRODUCT CODE	PRODUCT ASSEMBLY CODE	PARAMETER CODE	PARAMETER 1	PARAMETER 1 DESCRIPTION	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	CODE FOR ITEM	ITEM CODE FOR BOM
LAPTOP	VIDEO CARD	V-CARD	I3	Intel - i3	G-620	Intel ® HD Graphics 620	G-620	G-620
LAPTOP	VIDEO CARD	V-CARD	I5	Intel - i5	G-630	Intel ® HD Graphics 630	G-630	G-630
LAPTOP	VIDEO CARD	V-CARD	I7-U	Intel - i7: U Dual Core	NVIDIA-930	NVIDIA ® GeForce 930M...	NVIDI	NVIDIA-930
LAPTOP	VIDEO CARD	V-CARD	I7-H	Intel - i7: H Quad Core	NVIDIA-930	NVIDIA ® GeForce 930M...	NVIDI	NVIDIA-930

Now design for product configurator is ready.

We can use this **product configurator** while making sales quote or sales order. Now we will use it from sales quote.

Approve product 'Laptop' if approve tick mark is not there.

Dynamics 365 Business Central Product List > LAPTOP Environment Sandbox

PRODUCT

LAPTOP

Process Navigate Less options

General

Product Code: LAPTOP  
Description: Business Laptop  
Data Template Code: ITEM000005  
Unit of Measure: PCS  
Item Category Code: SUPPLIES  
Product Type: Assembly BOM  
Automatic Explode BOM: ☐

Price Calculation Formula: Standard  
No. Series: ITEM  
Approved: ☒  
Approved By: SWETA.VNA5  
Approved DateTime: 12/10/2018 4:44 PM  
Blocked: ☐

Product Assembly

PRODUCT CODE	ASSEMBLY CODE	ASSEMBLY DESCRIPTION	USE ITEM & PRODUCT CATEGORY
LAPTOP	PROCESSOR	Processor	

## Use Product Configurator

Assume that Customer no. '50000' wants to purchase 'LAPTOP' and your sales person is dealing with customer about Laptop and giving him sales quotation at that time.

Step 1: Create Sales quote for Customer no. '50000', for location 'EAST'.

**Dynamics 365 - Business Central** Sales Quotes > S-QUO1003 - Relecloud

**SALES QUOTE** S-QUO1003 · Relecloud

Process Quote Request Approval Actions Navigate Report Less options

**General**

Customer No. 30000 Order Date 4/9/2018  
 Customer Name Relecloud Document Date 4/9/2018  
 External Document No. TEST1 Quote Valid To Date  
 SELL TO Due Date 4/23/2018  
 Address 25 Water Way Requested Delivery Date  
 Address 2 Your Reference  
 City Atlanta Salesperson Code PS  
 State GA Campaign No.  
 ZIP Code 31172 Opportunity No.  
 Country/Region US Responsibility Center  
 Contact No. CP000008 Assigned User ID  
 Contact Jesse Homer Status Open  
 Customer Reference Code WORK DESCRIPTION

**Documents Attached**

**Sell-to Customer Sales History**

1	0	0
1	0	0
43	43	0
0		

**Sales Line Details**

**Dynamics 365 - Business Central** Sales Quotes > S-QUO1003 - Relecloud

**SALES QUOTE** S-QUO1003 · Relecloud

Process Quote Request Approval More options

**Invoice Details**

Currency Code Transaction Type  
 Shipment Date 4/9/2018 Department Code  
 Payment Terms Code 14 DAYS Customergroup Code  
 Payment Method Code BANK Payment Discount %  
 Tax Table Tax Discount Date 4/9/2018  
 Tax Area Code ATLANTA, GA Location Code EAST  
 Payment Service Demo Solution Account - PayPal Payments Standard

**Shipping and Billing**

**Foreign Trade**

**Documents Attached**

**Sell-to Customer Sales History**

1	0	0
1	0	0
43	43	0
0		

**Sales Line Details**

Step 2: In 'Type' field, select 'GL Account'. Press TAB twice and then in the same line again select 'ITEM'.  
 NOTE: The above step is to create an empty line of Type 'Item' in Sales Quote.

Step 3: Click on "Line" option & Select "Product Configurator". NOTE: Add the user to the User Setup if it does not exist. Go back to the Sales Quote if it

**Dynamics 365 Business Central** | Sales Quotes > S-QUO1003 - Relecloud | User Setup

USER SETUP

Search + New Edit List Delete Edit in Excel

USER ID	ALLOW POSTING FROM	ALLOW POSTING TO	REFS. TIME	SALESPERS./PU. CODE	SALES RESP. CTN. FILTER	PURCHASE RESP. CTN. FILTER	TIME SHEET ADMIN	E-MAIL
SWETA.VIRAS	01/02/18	12/31/2018						

**Dynamics 365 Business Central** | Sales Quotes > S-QUO1003 - Relecloud | Documents | SandBox

**SALES QUOTE** S-QUO1003 · Relecloud

Process Quote Request Approval Actions Navigate Report Less options

Contact: Jacek Horner

Lines Manage **Line** Functions Less options

Item Availability by Comments Item Tracking Lines Attachments

Select Item Substitution Item Charge Assignment Select Catalog Items Assemble to Order

Assemble-to-Order Lines  
Roll Up Price...  
Roll Up Cost...  
**Product Configurator**

Subtotal (Excl. Tax (USD)) 0.00 Total Sub-Tot (USD) 0.00  
Inv. Discount Amount (Excl. Tax (USD)) 0.00 Total Tax (USD) 0.00  
Invoice Discount % 0 Total Inv. Tax (USD) 0.00

**Invoice Details**

Country Code: Payment Service: Demo Sandbox Account - PayPal Payments Standard

**Documents Attached**

**Sell-to Customer Sales History**

1	0	0
1	0	0
43	43	0
0		

**Sales Line Details**

You can see that system has generated Configurator No. 'PCONF-00004', as defined in setup

Step 4: Drop down on 'Product Code' field and select 'Laptop'

**Dynamics 365 Business Central** | Sales Quotes > S-QUO1003 - Refectus > PCONF-00004

**PRODUCT CONFIGURATOR**

PCONF-00004

Process Actions Less options

**General**

Configurator No.	PCONF-00004	Suggested Code	
Product Code	LAPTOP	Total Unit Price	0.00
Product Description	Business Laptop	Last Date Modified	
Item Category Code	SUPPLERS	Creation Date	12/10/2018
Product Type	Assembly BOM	Status	New
Automatic Explode BOM	<input type="checkbox"/>	Created By	SWETA.VINAY
Suggested Item Code		Salesperson Code	
No. Series	ITEM		

**Sales Details**

Customer No.	50000	Document No.	S-QUO1003
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Step 5: Now click on Actions -> 'Get Subassembly & Parameter'

**Dynamics 365 Business Central** | Sales Quotes > S-QUO1003 - Refectus > PCONF-00004

**PRODUCT CONFIGURATOR**

PCONF-00004

Process **Actions** Less options

**Actions**

- Get Subassembly & Parameter
- Suggest Item Code
- Accept Configurator

Configurator No.	PCONF-00004	Suggested Code	
Product Code	LAPTOP	Total Unit Price	0.00
Product Description	Business Laptop	Last Date Modified	
Item Category Code	SUPPLERS	Creation Date	12/10/2018
Product Type	Assembly BOM	Status	New
Automatic Explode BOM	<input type="checkbox"/>	Created By	SWETA.VINAY
Suggested Item Code		Salesperson Code	
No. Series	ITEM		

**Sales Details**

Customer No.	50000	Document No.	S-QUO1003
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You can see that all the assembly codes defined in 'Product' is available here for parameter value selection.

**PRODUCT CONFIGURATOR**

PCONF-00004

Process Actions Less options

**Sales Details**

Customer No: 50000 Document No: S-QUOT003

Customer Name: RiteCloud Document Line No: 10000

Document Type: Quote

**Product Configurator Parameters**

ASSEMBLY CODE	ASSEMBLY DESCRIPTION	PARAMETER CODE	PARAMETER DESCRIPTION	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	SERIAL NO.	MA.	CODE FOR ITEM
PROCESSOR	Processor	INTEL-PROCE...	Intel Processors			1		
OPERATING S...	OPERATING SYSTEM	OP-SYS	Computer Operating Syst...			2		
HARD DRIVE	HARD DRIVE	HARD-DRIVE	Hard Drives			6		
MULTIMEDIA	MULTIMEDIA	MULTIMEDIA	Multimedia Options			7		

Step 6: Now Drop down 'Parameter Value' field on first line.

Step 7: Select '15'

As soon as you select parameter value 13, its description and code for the item will get updated. System takes parameter value as code for item.

**PRODUCT CONFIGURATOR**

PCONF00004

Process More options

**General**

**Sales Details**

**Product Configurator Parameters**

ASSEMBLY CODE	ASSEMBLY DESCRIPTION	PARAMETER CODE	PARAMETER DESCRIPTION	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	SERIAL NO.	MA.	CODE FOR ITEM	ITEM CODE FOR BOM
PROCESSOR	Processor	INTEL-PROCE...	Intel Processors	13	Intel - i3	1		13	13
OPERATING S...	OPERATING SYSTEM	OP-SYS	Computer Operating Syst...			2			
MEMORY	MEMORY	MEMORY	Computer Memory			3			
DISPLAY	DISPLAY	SCREEN-TYPE	Screen Types			5			
HARD DRIVE	HARD DRIVE	HARD-DRIVE	Hard Drives			6			
MULTIMEDIA	MULTIMEDIA	MULTIMEDIA	Multimedia Options			7			

Step 8: Now drop down 'Parameter Value' field for Operating System. Select 'NK-64-16'

Step 9: Drop-down 'Parameter Value' field for MEMORY. You will see that only two options are available. That is because of the dependency values selected while creating the product. Select DDR3.

Step 10: Drop-down 'Parameter Value' field for Video Card. Select 'G-620'.

Step 11: Drop-down 'Parameter Value' field for Display. Select '156-FHD'

Step 12: Drop-down 'Parameter Value' field for Hard Drive. Select 'HDD-1TB'.

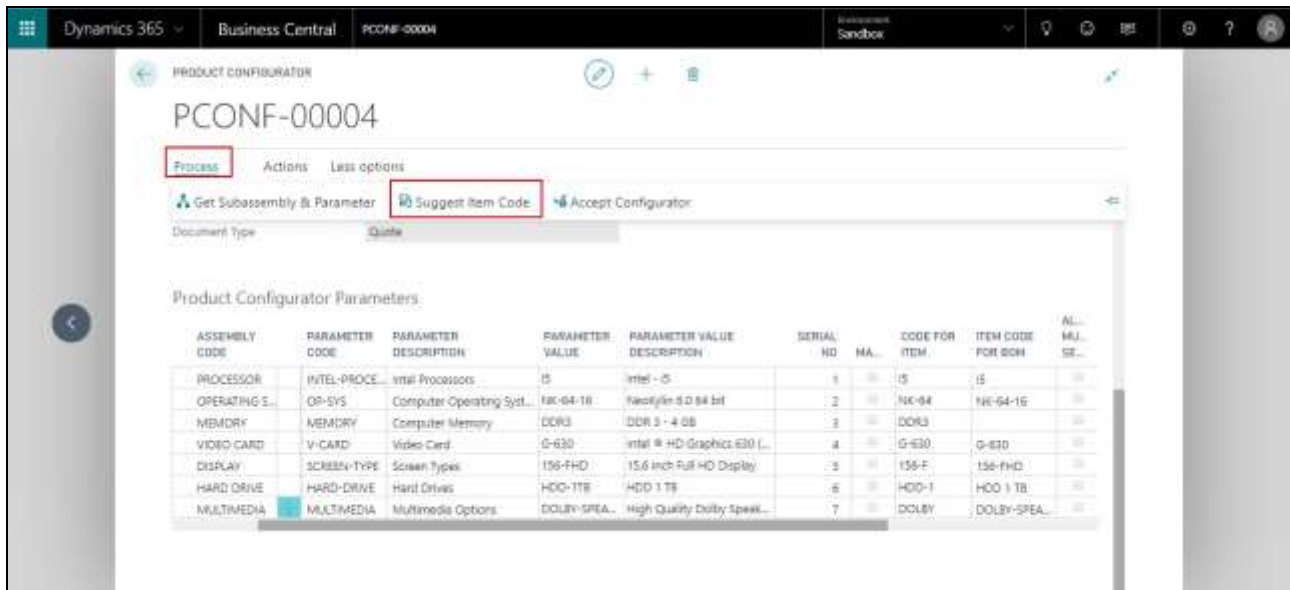
Step 13: Drop-down 'Parameter Value' field for Multimedia. Select 'DOLBY-SPEAKER'.

All the parameter values are thus defined.

Step 14: Now go to Process and click 'Suggest Item Code'.

Click 'YES' in message box.

Click 'OK' in message box.



PRODUCT CONFIGURATOR

PCONF-00004

Process Actions Less options

Get Subassembly & Parameter Suggest Item Code Accept Configurator

Document Type: Quote

Product Configurator Parameters

ASSEMBLY CODE	PARAMETER CODE	PARAMETER DESCRIPTION	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	SERIAL NO	MA...	CODE FOR ITEM	ITEM CODE FOR BOM	AL... ML... SE...
PROCESSOR	INTEL-PROCE	Intel Processors	i5	Intel - i5	1		i5	i5	
OPERATING S...	OP-SYS	Computer Operating Syst...	WIN-64-16	Windows 10 64 bit	2		WIN-64	WIN-64-16	
MEMORY	MEMORY	Computer Memory	DDR3	DDR 3 - 4 GB	3		DDR3		
VIDEO CARD	V-CARD	Video Card	G-630	Intel® HD Graphics 630	4		G-630	G-630	
DISPLAY	SCREEN-TYPE	Screen Types	156-FHD	15.6 inch Full HD Display	5		156-F	156-FHD	
HARD DRIVE	HARD-DRIVE	Hard Drives	HDD-1TB	HDD 1 TB	6		HDD-1	HDD 1 TB	
MULTIMEDIA	MULTIMEDIA	Multimedia Options	DOLBY-SPEA...	High Quality Dolby Speak...	7		DOLBY	DOLBY-SPEA...	

In Product Configurator Subassembly Tab, you can see a tick mark in 'Item Code Exists' field. It shows that assembly item is exist. If assembly item does not exist, check box will be blank, and we will have to create that item first.

'Unit Price' field shows assembly wise price of item. Had we selected 'Price calculation formula' as 'Discounted' on Product, then it would have captured discounted unit price if item's discount percentage were defined.



**Dynamics 365** | **Business Central** | Sales Quotes > 5-OUT-0001 - Priced out > PCONF-00004

**PRODUCT CONFIGURATOR**

PCONF-00004

Process | Actions | Less options

**General**

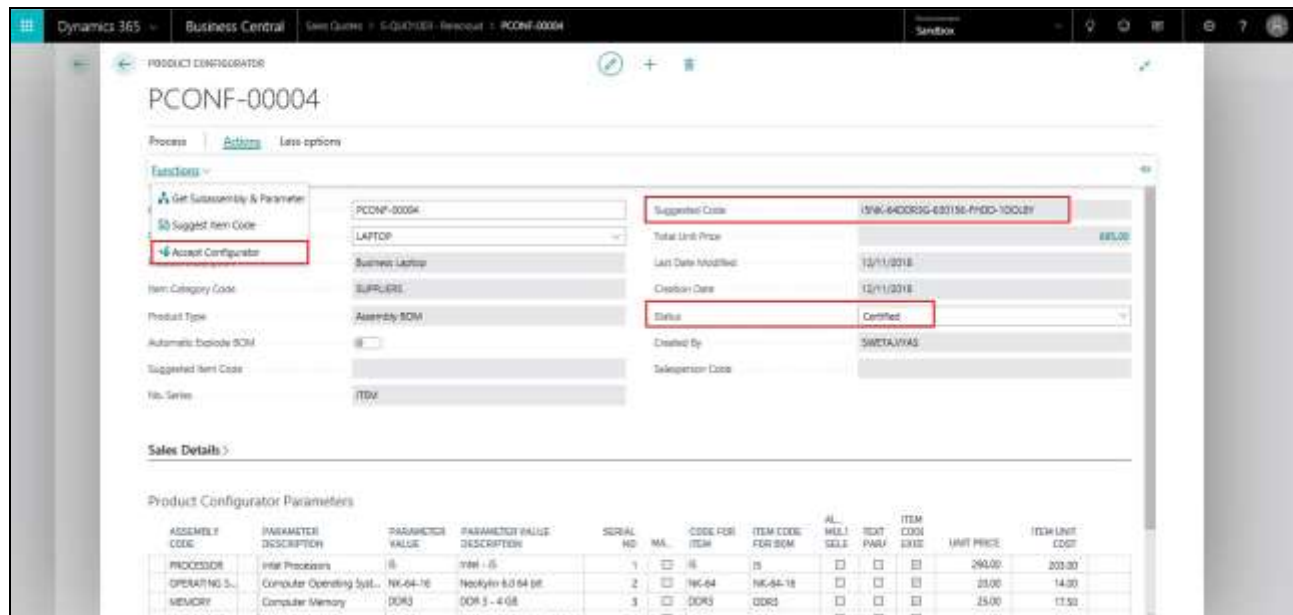
**Sales Details**

**Product Configurator Parameters**

ASSEMBLY CODE	PARAMETER DESCRIPTION	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	SERIAL NO.	MA.	CODE FOR ITEM	ITEM CODE FOR BOM	AL. MULT. SELL.	ISOT. PART	ITEM CODE FOR UNIT PRICE	UNIT PRICE	ITEM UNIT COST
PROCESSOR	Intel Processors	i5	Intel i5	1	<input type="checkbox"/>	i5	i5	<input type="checkbox"/>	<input type="checkbox"/>		260.00	203.00
OPERATING S.	Computer Operating Syst.	NK-64-16	Windows 10 64-bit	2	<input type="checkbox"/>	NK-64	NK-64-16	<input type="checkbox"/>	<input type="checkbox"/>		30.00	14.00
MEMORY	Computer Memory	DOR3	DOR 3 - 4 GB	3	<input type="checkbox"/>	DOR3	DOR3	<input type="checkbox"/>	<input type="checkbox"/>		25.00	17.50
VIDEO CARD	Video Card	G-430	Intel® HD Graphics 430 (M)	4	<input type="checkbox"/>	G-430	G-430	<input type="checkbox"/>	<input type="checkbox"/>		55.00	35.00
DISPLAY	Screen Types	156-PHD	15.6 inch Full HD Display	5	<input type="checkbox"/>	156-P	156-PHD	<input type="checkbox"/>	<input type="checkbox"/>		85.00	56.00
HARD DRIVE	Hard Drives	HDD-1TB	HDD 1 TB	6	<input type="checkbox"/>	HDD-1	HDD-1 TB	<input type="checkbox"/>	<input type="checkbox"/>		180.00	126.00
MULTIMEDIA	Multimedia Options	CLSY-SPEAKER	High Quality Dolby Speaker	7	<input type="checkbox"/>	DOLBY	DOLBY-SPEA	<input type="checkbox"/>	<input type="checkbox"/>		50.00	25.00

Step 15: Now drop down 'Status' field and select 'Certified'.

Click 'YES' in message box



PRODUCT CONFIGURATOR

PCONF-00004

Process: Actions: Last options

Functions

- Get Subassembly & Parameter
- Suggest Item Code
- Accept Configurator**

Item Category Code: PCONF-00004

Product Type: Laptop

Automatic Include BOM: ☐

Suggested Item Code: SUPPLERS

Item Series: ITDM

Suggested Code: 15W-6400R3G-630156-PROD-10028

Total Unit Price: 885.00

Last Date Modified: 12/11/2018

Creation Date: 12/11/2018

Status: Certified

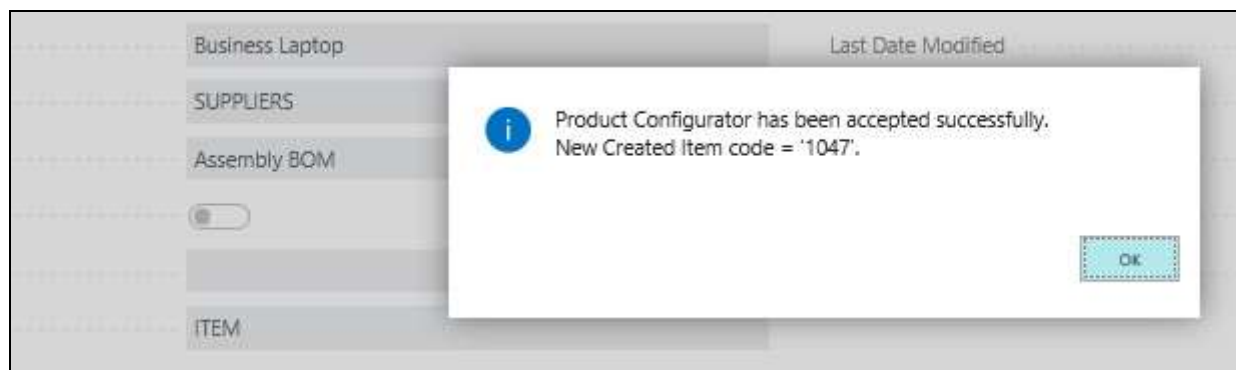
Created By: SWEETA,VIAS

Telephone Code:

Sales Details

Product Configurator Parameters

ASSEMBLY CODE	PARAMETER DESCRIPTION	PARAMETER VALUE	PARAMETER VALUE DESCRIPTION	SERIAL NO.	MA.	CODE FOR ITEM	ITEM CODE FOR BOM	AL.	MULTI	TEXT	ITEM CODE	UNIT PRICE	ITEM UNIT COST
PROCESSOR	Intel Processors	i5	Intel - i5	1		i5	i5					290.00	203.00
OPERATING S...	Computer Operating Syst...	WIN-64-16	Windows 6.0 64 bit	2		WIN-64	WIN-64-16					20.00	14.00
MEMORY	Computer Memory	DOR3	DOR 3 - 4 GB	3		DOR3	DOR3					25.00	13.50



Business Laptop

SUPPLERS

Assembly BOM

ITEM

Last Date Modified

Product Configurator has been accepted successfully.  
New Created Item code = '1047'.

OK

Click 'OK' on message box.

Click 'Back Arrow' on Product Configurator page to close the page.

You can see that in Sales Quotation, newly created Item code by configurator is updated.

Also 'Unit Price' and 'Unit of Measure' fields are updated. Newly created item will get updated in the Item list.

**Dynamics 365 Business Central** | Sales Quotes | S-QUO1003 - Reflecloud

**S-QUO1003 · Reflecloud**

Process: Quote | Request Approval | Actions | Navigate | Report | Less options

**General**

Customer Name:  | Due Date: 4/03/2018  
 External Document No.: TEST1 | Requested Delivery Date:  
 Contact: Jesse Hunter

**Lines** | Manage | More options

TYPE	NO.	SE- FOR PROD E34F	DESCRIPTION	LOCATION CODE	QUANTITY	QTY TO ASSIGNABLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. TAX
Item	1347		Business Laytop	SAST		0	PCS	695.00			

Summary:

Summar Excl. Tax (USD)	0.00	Total Excl. Tax (USD)	0.00
Incl. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	0.00

**Invoice Details**

In this way, we can configure a product. We can do same thing from Sales Order (method remains same).