



PeopleSoft 8
CRM Sales Product Configurator
PeopleBook

PeopleSoft 8 CRM Sales Product Configurator PeopleBook

SKU CRMr8CSPC-B 0601

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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ABOUT THIS PEOPLEBOOK

The book provides you with the information that you need to implement and use PeopleSoft CRM Sales Product Configurator. You can order the online version by requesting SKU CRMB8R0 or the print version by requesting SKU CRMr8CSPC-B 0601.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft Customer Relationship Management product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating through the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

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You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8 Customer Relationship Management PeopleBooks*, SKU CRMB8R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

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We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

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From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.

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Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`

Indicates a code example.

Bold

Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).

Italics

Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value***.

We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.

KEY+KEY

Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

Cross-references

The phrase "For more information" indicates where you can find additional documentation on the topic at hand.

- Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8 Billing PeopleBook*.
- Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8 Projects PeopleBook*, "Integrating With PeopleSoft Billing and PeopleSoft Contracts."
- Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see "Securing Your PeopleSoft Contracts System."
- Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!**, the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates **For more information** cross-references to related or additional information.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is <code>DETAIL_CALENDAR1</code> .
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, SetID and Calendar ID are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager
 PeopleSoft, Inc.
 4460 Hacienda Drive
 Pleasanton, CA 94588

Or send comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

PeopleSoft CRM Sales Product Configurator PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft CRM Sales Product Configurator.

PeopleBooks Standard Field Definitions

Throughout our product documentation, you will encounter fields that are used on many application pages or panels. This section lists the most common fields in PeopleSoft CRM Sales Product Configurator and provides standard definitions.

Field	Definition
Business Unit	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Free-flow text up to 30 characters.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
<hr/> For more information about effective dates, see Learning about Effective Dates. <hr/>	
Language or Language Code	<p>The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them.</p> <p>Language also refers to the language spoken by an employee, applicant, or nonemployee.</p>

Field	Definition
Process Frequency (group box)	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.
Process Monitor	This hyperlink takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	The report identifier.
Report Manager	This hyperlink takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
<hr/> For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics . <hr/>	
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your company's structure and processing options.
Short Description	Free-flow text up to 15 characters.
Status	Your options in this field are <i>Active</i> or <i>Inactive</i> . By linking status and effective date, you can retain historical information and plan future implementation. For auditing purposes, PeopleSoft encourages inactivating data that is no longer in use instead of deleting it.
User ID	The system identifier for the individual who generates a transaction.

CHAPTER 2

Establishing Items and Products for Configuration

The PeopleSoft CRM Sales Product Configurator is a rules-based system that allows you to order and manufacture complex items and products. You can define custom order-entry pages for entering and validating configuration information. The configuration information that you enter determines the specific options, components, and operations that are used to create the end product.

PeopleSoft CRM Sales Product Configurator is integrated with the PeopleSoft CRM Sales application.

The setting up of business units, setIDs, items, products, and so forth is required before using PeopleSoft CRM Sales Product Configurator. This topic discusses the specific steps that you need to take to set up your items and products for configuration.

For more information about setting up items and products, see the PeopleSoft CRM Application Fundamentals PeopleBook.

CHAPTER 3

Preparing to Create Rules

The PeopleSoft CRM Sales Product Configurator owes much of its adaptability to the powerful grammar of the rules that define the process. We ship the tools to create the system and leave the steps of any particular product configuration up to you. This means that optimizing your configurations depends on having a sound grasp of rule syntax and how to put the rules together into a working logic tree. Having many choices and capabilities, though, doesn't mean that you're entirely on your own. The PeopleSoft CRM Sales Product Configurator offers a limited number of rule actions, operands, and variable types that are easy to master at the same time that they give you maximum flexibility.

In Preparing To Create Rules, we look at the rules in general and the way that they fit together. Later we will look at the specifics for creating particular rule types.

Identifying Rules

Each rule in your PeopleSoft CRM Sales Product Configurator is uniquely identified by its setID, functional area, and rule number.

Understanding Rule Functional Areas

The rules that you define for the PeopleSoft CRM Sales Product Configurator will apply to one of the two functional areas, either Distribution or Production. As you create each rule, you specify which of those areas you want the rule to apply to. This information becomes a key that identifies the rule.

Because the logic trees for Distribution and Production are independent of each other, an individual rule works in only one of the functional areas (Distribution or Production). In addition, many types of rules, by their nature, apply to only one functional area.

Understanding Configuration Variables

This section discusses specifying, displaying, and using variable type codes.

Specifying Variable Types

The PeopleSoft CRM Sales Product Configurator uses ten types of variables. Together, those variables give you a flexible system for designating values as you configure products.

The system comes with default codes for variable types. You can change those codes, but it is not recommended. For example, you can change the codes to accommodate descriptions that are translated into another language. The system associates user-defined Variable Types with International Variable Type Codes. The International Variable Type Codes *cannot* be changed.

Variable Type Name	Variable Type (Default)	International Variable Type Code	Description
Option Variable	O	01	A value that is entered on a page within a sales order entry.
Secondary Variable	S	02	A temporary storage field within a rule tree. It applies locally within a node of the tree.
Global Variable	G	03	A temporary storage field within a rule tree. It applies globally within the entire tree.
Matrix Variable	X	04	Invokes result values from a predefined matrix of up to five variable values.
Internal Variable	I	05	Retrieves values that exist as fields in PeopleSoft applications tables.
Multiple Option Variable	M	06	Checks for values in a set of interchangeable options fields.
Value List	U	07	Validates options against a predefined list of values.
External Program Variable	P	08	Calls a program outside of PeopleSoft

Variable Type Name	Variable Type (Default)	International Variable Type Code	Description
			applications to compute and return a value.
Literal	L	11	Inserts a character string into a configuration code.
Constant	C	14	Defines a value that doesn't change.

Variable Type Page

Usage	Use the Variable Type page to display the codes for Variable Types. This page is for informational purposes only. The check boxes define where each variable type can be used. All variable types are valid in syntax.
Object Name	CP_VAR_TYPE_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Variable Type, Update/Display
Access Requirements	Enter a 1-character Variable Type.

Variable Type page

The **Variable Type** that you entered to access this page is displayed.

Variable Type Description Displays the description.

International Variable Type Code Displays the international code and short description.

Used on Matrix If checked, indicates that you can use the variable on a matrix header.

For more information about using variable types in matrixes, see Establishing Configuration Variables

Used on Template

If checked, indicates that you can use the variable within a configuration code template.

For information about variables in templates, see *Working with Configuration Codes*

Used on Internal Variable

If checked, indicates that you can use the variable on an internal query for an internal variable.

Using Value Types

The value of a variable in the PeopleSoft CRM Sales Product Configurator is one of three different types.

<i>Type of Value</i>	<i>Value Code</i>	<i>International Value Code</i>
Character	C	09
Numeric	N	10
Boolean		12

- A *character* value is an alphanumeric string that cannot be used for calculations.
 - Character values must be enclosed in quotation marks.
 - The maximum length is 18 characters.
- A *numeric* value is used for mathematical manipulation.
 - The maximum length is 15 digits. (The maximum number of digits is 11, and the maximum number of decimal places is 7.)
 - You can define the decimal precision of numbers for each variable. The default form is 11,4 (four decimal positions). The range for the decimal format is 11,4 to 8,7.
- A *Boolean* (logical) value is either true (“1” or 1) or false (“0” or 0).
 - Most evaluation processes use Boolean results.
 - Boolean values cannot be entered into syntax. Syntax expressions with logical results can be used as parts of more complex syntax construction.
 - A Boolean value is just a “1” or “0” character or a number value with a length of 1.

- A *Date* value is used for calendar processing.
 - The date format used in the Sales Product Configurator is YYYYMMDD format.
 - A date value is a character type of value with a length of 8 characters.

Understanding Configuration Operands

This section describes how to use operands and how to display them on the system.

Using Operands

The PeopleSoft CRM Sales Product Configurator has predefined operands that you can use to compose syntax expressions. As it does with rule actions and variables, the system associates symbols or characters for each operand with its International Operand Code. International Operand Codes are system-defined and *cannot* be changed.

These operands do the work of producing results from rules, whether you want to generate a numerical value or an identifying character string. Each operand requires a specific type of value in the rule syntax to process—characters (C), numbers (N), Boolean (B), or Date (D) values. Logical (Boolean) values used in syntax are always in the form of a syntax expression.

Equal

The Equal operator tests whether V1 and V2 are the same value. You can use it to evaluate numeric or character values, as long as *both* variables are the same value type. For example, asking the system whether 4 minus 2 is equal to *green* causes an error because the variables are different types.

Less Than

The Less Than operator tests whether V1 is less than V2. You can use it only for numeric variables.

Less Than or Equal

The Less Than or Equal operator tests whether V1 is less than or equal to V2. You can use it only for numeric variables.

Greater Than

The Greater Than operator tests whether V1 is greater than V2. You can use it only for numeric variables.

Greater Than or Equal

The Greater Than or Equal operator tests whether V1 is greater than or equal to V2. You can use it only for numeric variables.

If

The If operator specifies V1 as a value when V2 is true. V2 must be an *expression* that yields a Boolean (true/false) value. You cannot enter *true* or *false* as a value for use in syntax.

The result of the if operation is the same type of value as V1 (either numeric or character). If V2 is true, the result value will be V1. If V2 is false, the result will be 0 or blank.

For example, the expression

```
(100, IF, (O-COLOR, =, "RED"))
```

yields the result of 100 if COLOR = RED. If COLOR does not = RED, then the result is 0.

Or

The Or operator tests whether either V1 or V2 is true. Both V1 and V2 must be *expressions* that yield Boolean (true/false) values. You cannot enter *true* or *false* as a value for use in syntax.

The result is true unless both V1 and V2 are false.

And

The And operator tests whether both V1 and V2 are true. Both V1 and V2 must be *expressions* that yield Boolean (true/false) values. You cannot enter *true* or *false* as a value for use in syntax.

The result of an and operation is false unless both V1 and V2 are true.

Concatenate

The Concatenate operator links two character strings to form one string. You can concatenate numeric values, but the system treats them as alphanumeric character strings. Since Concatenate is useful for putting results together into a readable code, you can include any combination of characters and numbers in your result.

<i>Concatenation Expression</i>	<i>Result</i>
("WH" , CT, "COLOR")	"WHCOLOR"
("WH" , CT, " COLOR")	"WH COLOR"
("WH" , CT, "T ")	"WHT"

The result of a concatenation operation is a character value of up to 18 characters. The system cuts off any characters after the first 18. Trailing spaces are dropped.

Substring After

The Substring After operator selects the last portion of a character string. You determine the initial character value in V1. V2 is the number of the position where the substring starts. Because the total character string can include no more than 18 characters, V2 must be a whole number between 1 and 18. For instance, the expression

```
("CLEMENTINE" , SA, 7)
```

yields the result

```
"TINE"
```

Note that the substring includes the position that it specifies.

Substring Before

The Substring Before operator selects the first portion of a character string. You determine the initial character value in V1. V2 is the number of the position where the substring ends. Because the total character string can include no more than 18 characters, V2 must be a whole number between 1 and 18. For example, the expression

```
("CLEMENTINE" , SB, 7)
```

yields the result

```
"CLEMENT"
```

Note that the substring includes the position that it specifies.

Exist on Multiple Option

The Exist on Multiple Option operator tests whether V1 is a value for one of the options on a Multiple Option table. V2 specifies which Multiple Options table to check. Depending on what kinds of values the Multiple Option table specified by V2 contains, V1 can be either a number or a character value:

```
("YELLOW" , EM, M-COLORS)
```

This example checks a paint color against a Multiple Options table that contains all of the parts that need painting on the bike that you're configuring. We have a Multiple Options table called COLORS, with the following options as elements:

```
FRAMECOLOR  
WHEELSCOLOR
```

A user selection on a sales order page or a rule that modifies an option in the configuration process determines the value of each option. If any of these options is associated with the

value *YELLOW*, the result of the Exist on Multiple Option operation is true. If not, the result is false.

The operation yields a result only when V1 is the same type of value (character or numeric) as each option that exists on the table specified by V2.

For more information about Multiple Options tables, see Establishing Multiple Option Variables.

Exist on Value List

The Exist on Value List operator tests whether V1 is a value on the Value List Table that is specified by V2.

For more information about Value List Tables, see Establishing Value List Variables.

Add

The Add operator adds the value of V1 to the value of V2. Both variables must be numbers.

Subtract

The Subtract operator subtracts the value of V2 from the value of V1. Both variables must be numbers.

Multiply

The Multiply operator multiplies the value of V1 by the value of V2. Both variables must be numbers.

Divide

The Divide operator divides the value of V1 by the value of V2. Both variables must be numbers.

Round Down

The Round Down operator divides V1 by V2 and returns the closest integer value that is less than or equal to the result. V2 cannot equal 0.

Round Up

The Round Up operator divides V1 by V2 and gives the closest integer value that is greater than or equal to the result. V2 cannot equal 0.

Calculate Date

The Calculate Date operator uses the calendar to determine a new date. V1 is a date value representing the start date in the format YYYYMMDD. V2 is the number of days to add to the date.

The result of a calculate-date operation is a date value that represents the date in the format YYYYMMDD.

Operand Page

Usage	Use the Operand page to display the International Operand Code and the Operand Description. This page is for informational purposes only.
Object Name	CP_OPERAND_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Operand
Access Requirements	You can press ENTER (with blank fields) when the dialog box is displayed and select the code to be displayed from the list.

Operand

Operand:

*

*Operand Description:

Multiply

*International Operand Code:

22

Multiply

Operand page

Operand	The operand that you entered to access this page is displayed.
Operand Description	Displays the operand that you selected. See Using Operands for a description of each operand.
International Operand Code	Displays the International Operand Code for this operand and a short description. This field is display-only.

The following table of operands shows:

- Default descriptions
- Default operand code symbols
- International operand codes
- PeopleSoft CRM Sales Product Configurator syntax value types
- Result value types

Operand Description (Default)	Operand Code	International Code	Value Type (V1,V2)	Result Value Type
Equal	=	01	(N,N) (C,C)	B B
Less Than	<	02	(N,N)	B
Less than or Equal	<=	03	(N,N)	B
Greater Than	>	04	(N,N)	B
Greater Than or Equal	>=	05	(N,N)	B
If	IF	06	(N,B) (C,B)	N C
Or	OR	07	(B,B)	B
And	&	08	(B,B)	B
Concatenate	CT	10	All combinations	C
Substring After	SA	11	(C,N) (N,N)	C C
Substring Before	SB	12	(C,N) (N,N)	C C
Exist on Multiple Option	EM	13	(C,M) (N,M)	B B
Exist on Value List	EU	14	(C,U) (N,U)	B B
Add	+	20	(N,N)	N
Subtract	-	21	(N,N)	N
Multiply	*	22	(N,N)	N
Divide	/	23	(N,N)	N
Round Down	RD	24	(N,N)	N
Round Up	RU	25	(N,N)	N
Calculate Date	CD	26	(N,N) (C,N)	C C

Understanding Rule Trees

Rules work in a logical tree that determines the order in which the system processes them. While each rule is a grammatical statement that performs an operation, the rule tree dictates the context of the statement, that is, what other operations it will affect. With the PeopleSoft

CRM Sales Product Configurator, you use separate trees for Distribution and Production configuration. You can use a rule more than once within a tree.

Tree Page

Usage	<p>Use the Tree page to build or maintain the rule tree structure for PeopleSoft CRM Sales Product Configurator rules. The rules in the rule tree run in sequence with jumps to other nodes (where they exist) in the sequence.</p> <p>For example, on the following page, Node 1, rule ST-0000000 starts a trace. Rule BKCEN-00 branches to Node 2, which comprises several custom bike component list rules. After the rules on Node 2 finish running, control comes back to Node 1. Now rule BKCEN-10 runs and jumps to Node 3, where several Operation Sequence rules execute. Then control again returns to Node 1, and rule ET-9999999 ends the rule trace and the rule execution within this tree.</p>
Object Name	CP_TREE_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Tree, Tree
Access Requirements	Enter the SetID, Tree, and Functional Area.

Tree

SetID: SHARE Functional Area: Production
Tree: LT5010_PRDN_TREE *Description: LT5010 Custom Bike Production

Tree Node(s)
Node: 1 [Add a True Child for Sequence #1](#) [Add a False Child for Sequence #1](#)

Tree Sequence(s) [Find](#) | [View All](#) First 1-4 of 4 Last

General Information

Additional Information

Select	*Sequence	Rule	True Child	False Child
<input checked="" type="checkbox"/>	1	ST-0000000 Start Trace Production Rules		
<input type="checkbox"/>	5	BKCEN-00 Branch for Custom Bike CL Rules	2	
<input type="checkbox"/>	10	BKCEN-10 Branch for Custom Bike OS Rules	3	
<input type="checkbox"/>	15	ET-9999999 End Trace for Production Rules		

Tree - General Information page

Note. Multiple views of this page are available by clicking the scroll arrows. We document the fields that are common to all views first.

Common Page Information

The **SetID**, **Functional Area**, and **Tree** information that you entered to access this component are displayed.

Description	Description of the rule tree.
Node	A logical branch on a rule tree.
Add a True Child for Sequence <i>n</i>	Click this link in the Tree Node(s) group box to add a child node for the selected sequence that processes when the rule condition evaluates to <i>true</i> . A <i>true</i> child node processes when the rule condition is true.
Add a False Child for Sequence <i>n</i>	Click this link in the Tree Node(s) group box to add a child node for the selected sequence that processes when the rule condition evaluates to <i>false</i> . A <i>false</i> child processes when the rule condition is false
Select	Select a row in order to add children or make other changes.
Sequence	The order for processing the rules on a given node. If you leave gaps in your numbering sequence, you can easily add other rules to the tree later.
Rule	The name of the rule.

Tree - General Information Tab

See the above screen shot for a view of this page. The description of the rule is displayed on this tab. If a **True Child** or **False Child** node exists an arrow and the node number display in the associated column.



Click the **Search** button to access a specific rule.



Click the **Add/Update** button to add a new sequence line for the current node or to update the existing line.



Click the **Go To True Child** button in the **True Child** column to view the child node that is associated with the arrow.

Click the **Go To False Child** button in the **False Child** column to view the child node that is associated with the arrow.



When you are viewing a child node, click the **Return to Parent Node** button to return to the parent node.

Tree - Additional Information Tab

Tree

SetID: SHARE Functional Area: Production

Tree: LT5010_PRDN_TREE *Description: LT5010 Custom Bike Production

Tree Node(s)

Node: 1 [Add a True Child for Sequence #1](#) [Add a False Child for Sequence #1](#)

Tree Sequence(s) [Find](#) | [View All](#) First 1-4 of 4 Last

General Information Additional Information

Select	*Sequence	Rule	Condition
<input checked="" type="checkbox"/>	1	ST-0000000	Create Jump Back
<input type="checkbox"/>	5	BKCN-00	Create Jump Back
<input type="checkbox"/>	10	BKCN-10	Create Jump Back
<input type="checkbox"/>	15	ET-9999999	Create Jump Back

Tree - Additional Information page

Condition

This is the rule condition. It is a display-only field.

Create Jump Back

Select the **Create Jump Back** link to access the Jump Back page.

Tree Page - Jump Back Page

Usage	You can use the Tree - Jump Back page to jump back to a specific node and sequence if the current rule is in the Distribution functional area. The Jump Back link enables you to send processing back to an earlier rule depending on the result of the current one. The value in the Jump Back to Node and Sequence fields tell the system where it should go next.
Object Name	CP_TREE_JUMP_SEC
Navigation	Click the Create Jump Back link on the Tree – Additional Information tab.

Tree - Jump Back

SetID: SHARE Functional Area: Production Tree: LT5010_PRDN_TREE

If the Rule is True, then

Jump Back To Node:

Sequence:

Tree - Jump Back page

The **SetID**, **Functional Area**, and **Tree** information are displayed. Select the option for the condition from the drop-down list: **If the Rule is True, then** or **If the Rule is False, then**.

Jump Back To Node Specify which node to jump back to. Only jump back to rules or nodes within the rule tree that are above the rule or node that you are jumping back from. In other words, you can jump back only to a parent node in the current node/sequence.

Sequence Specify which sequence to jump back to.

We recommend that you *not* use Jump Back rules in your rules tree.

Click **OK** to return to the Tree page.

Understanding Rule Processing

Configuration rules will execute based on the node/sequence order that has been defined in the rule tree. If the condition of a rule is met (that is, if the condition syntax for the rule is evaluated as true), then the action of the rule is performed. The system processes all of the rules in the order of their sequence numbers unless a *true* child or a *false* child exists that satisfies a condition within the node. In that case, the system branches to the designated node and processes the rules in sequence at that level. The system follows the rule tree down through successive nodes, from the parent nodes down through the child nodes, before returning to the first logical level.

Filtering Rule Processing

You can use effective-dating and rule processing modes to filter rule processing.

Using Effective Dating

In addition to a rule number, each rule must have an Effective Date and an Obsolete Date. These dates identify the rules to use for the configuration of a product. For each product, the system processes only the rules that are in effect, based on the dates.

Effective dates enable different sets of rules for the same item to be maintained simultaneously. As features and options change, the configuration can also change (without losing the original configuration rules). By changing the effective dates on the rules, you will process different sets of rules.

For example, if the effective date was 08/06/00, and the obsolete date was 08/10/00, based on a sales order date, the following would occur:

Date	Status
08/03/00	Skipped
08/06/00	Processed
08/10/00	Processed
08/11/00	Skipped

Effective dates are not part of the key, but you can use them as a selection filter for retrieving rules.

Using Rule Processing Modes

Rule processing modes are designated as you create rules. They are filters for rule selection during processing. They allow you to specify whether a rule will process in order entry, direct production, or requisition generation.

For more information about setting rule-processing modes, see Rule - Rule Processing Modes Page.

Understanding Rule Actions

The PeopleSoft CRM Sales Product Configurator gives you flexibility and a helpful structure, by providing predefined rule types for your logic. Rules are categorized by the kind of processing that they require from the system.

Rule Action Codes define the type of processing that the rule invokes. Each rule has only one rule action, although many different rules within a tree might perform the same action. You can use a rule more than once within a rule tree.

PeopleSoft delivers the following action codes with the system:

Functional Area	Action Code (Default)	International Action Code
Common	Condition	01
	Secondary Variable	02
	Global Variable	03
	Option Variable	04
	Internal Variable Override	05
	Create Parameter	06

Functional Area	Action Code (Default)	International Action Code
	Configuration Detail	07
	Start Trace	08
	End Trace	09
Distribution	Page Generation	20
	Page Validation	21
	Configured Component	22
	Purchase Item	23
	Finalize Price	24
	Finalize Cost	25
	Finalize Date	26
	Availability Date	27
	Workflow	28
	Kit Component	29
	Product Selector	33
Production	Component List	30
	Operation Sequence	31

Action Code - Condition Page

Usage	Use the Action Code - Condition page to display the International Action Code that is associated with the user-defined code. The International Action Code determines the rule type and its action. The page specifies the form of the rule detail page for this rule action.
Object Name	CP_ACTION_CODE_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Action Code, Action Code - Condition
Access Requirements	Enter the Action Code in the dialog box, or click OK to select the Action Code from a list.

Action Code - Condition

Action Code - Results

Action Code:

CC

*Action Code Description:

Configured Component

*International Action Code:

22

Configured Component

Application Area

☐ Distribution

☐ Production

☐ All Areas

Condition Validation

☐ No Display

☐ Display

Action Code - Condition page

Action Code	The Action Code is displayed. It defines the type of processing that the rule invokes.
Action Code Description	The description of the action code.
International Action Code	The numeric international action code and a short description is displayed.
Application Area	The Application Area specifies the functional area of any rules written with this rule action. This information is display-only.
Condition Validation	The Condition Validation specifies whether the given rule will have a Condition syntax expression. This information is display-only.

For more information about rule actions and their associated syntax, see Establishing Common Rules, Establishing Distribution Rules and Establishing Production Rules

Action Code - Results Page

Usage	Use the Action Code - Results page to view the validation for the results for the action code. This information is display-only.
Object Name	CP_ACTION_COD2_PNL
Navigation	Click the Action Code – Results tab from the Action Code – Condition page.

Action Code - Condition		Action Code - Results	
Action Code:	CC		
*Action Code Description:	Configured Component		
*International Action Code:	22	Configured Component	
Result One Validation			
<input type="radio"/> No Display	Result One Length:	18	
<input type="radio"/> Display	Result One Description:	Product ID/Item ID (Syntax)	
<input type="radio"/> Syntax			
Result Two Validation			
<input type="radio"/> No Display	Result Two Length:	5	
<input type="radio"/> Display	Result Two Description:	Production Area (Syntax)	
<input type="radio"/> Syntax			

Action Code - Results page

Action Code	Displays the action code.
Action Code Description	The description of the action code.
International Action Code	The numeric international action code with the description.

Result One Validation

No Display	Indicates that this rule type has no results (like a Condition rule). Most rules have one or two result validations.
Display	Indicates that this rule type creates a field for a non-syntax value for a result.
Syntax	Indicates that this rule type creates a field for a syntax expression for the result.
Result One Length	This field applies to the non-syntax portion of the result expression, if any. The maximum number of characters is 254 for both the syntax and non-syntax portion of the result.
Result One Description	The description appears over the result field that you can enter on a rule detail page.

Result Two Validation

No Display	Indicates that this rule type has no results (like a Condition rule). Most rules have one or two result validations.
Display	Indicates that this rule type creates a field for a non-syntax value for a result.
Syntax	Indicates that this rule type creates a field for a syntax expression for the result.
Result Two Length	This field applies to the non-syntax portion of the result expression, if any. The maximum number of characters is 254 for both the syntax and non-syntax portion of the result.
Result Two Description	The description appears over the result field that you can enter on a rule detail page.

Understanding Rule Syntax

Rules tell the system to perform actions when the condition for that action is met. Each rule that you define has two syntactic components:

- A *condition expression* is a fundamental part of the grammar of every rule. Don't confuse the condition expression with the Condition rule. The Condition rule is used in logical sequence with other complete rules.
- When the condition expression is true, the rule is executed, and control passes to any existing true child node. When the condition expression is false, control passes directly to any existing false child node. If a child does not exist for the result of the condition (true or false), there is no further action with the rule after the rule is processed.

While all rules are governed by rule syntax, the expressions within rules can be either syntax or non-syntax. The system interprets syntax expressions to yield a result. Non-syntax expressions give a predefined result whenever the rule's condition is met. An example of a non-syntax expression is the business unit for a configured component. Condition expressions are always syntax. Action expressions can be syntax or non-syntax or a combination of the two. Each rule type takes different combinations of syntax and non-syntax action expressions.

The Syntax Builder is a PeopleSoft CRM Sales Product Configurator tool that assists you in building and maintaining rules and rule syntax.

For information about the Syntax Builder, see Syntax Builder Page. **For more information** about the form of action expressions in individual rules, see Establishing Common Rules, Establishing Distribution Rules and Establishing Production Rules

Composing Syntax Expressions

The PeopleSoft CRM Sales Product Configurator interprets syntax expressions to produce a result. Depending on the expression, the result can be numeric, a character string, or Boolean (true or false). As in English grammar, syntax expression for rules are made up of one or more independent, simple expressions that are logically connected. A simple syntax expression consists of two variables and the operation that links them.

The PeopleSoft CRM Sales Product Configurator interprets syntax expressions based on their grouping within parentheses. The parentheses make complicated expressions possible, but even simple expressions require them. Syntax grouping is also affected by the fact that the Operand Table does not include negative operations, such as *not equal* to or *not greater than*. These statements depend on an *N* (meaning *not*) prefacing the expression.

For more information about variables and operands, see Syntax Builder Page and Using Operands.

Syntax expressions take the following form:

- Negation character (optional)
- Opening parenthesis
- First variable
- Operand
- Second variable
- Closing parenthesis

The syntax for variable names consists of three parts:

- A letter to indicate the type of variable. For example, *O-FRAME* is an Option variable, *M-COLORS* is a Multiple Option variable, and so forth.
- A hyphen as a separator.
- The user-defined name. (The name cannot include a hyphen.)

For example, to create an expression that means *the Frame option is equal to a Y for this field*, write:

```
(O-FRAME, =, "Y")
```

That is, the condition is validated when the Option variable FRAME is equal to the literal character Y. For the opposite—a condition is validated when O-FRAME is *not* equal to Y—write:

```
N (O-FRAME, =, "Y")
```

You can combine syntax expressions to make a more complicated statement by ordering the parts of the expressions within parentheses. Either or both of the variables in a syntax statement can be defined by syntax statements within the larger one. It is valid to construct a statement in this format:

```
( (V1,operand1,V2) ,operand2,V3 )
```

Always double-check the order of complex expressions. The system always processes an entire simple expression within parentheses before applying its value to the next level. And it processes expressions in the order that they occur. For example, the expression

```
( (V1,operand1,V2) , operand3, (V3,operand2,V4) )
```


processes as

```
(V1,operand1,V2) = A
```

```
(V3,operand2,V4) = B
```

```
(A,operand3,B)
```

Syntax Builder Page



Usage	Use the Syntax Builder page to create and maintain the syntax expressions for use in PeopleSoft Product Configurator rules. Follow the numbered steps on the page to construct your syntax.
Object Name	CP_SYNX_SEC_PNL
Navigation	 Click the Syntax Wizard button on the various rule detail pages (depending on the rule type) to access the Syntax Builder page.

Syntax Builder

Variable Syntax

Variable1:  

Operator: ☐ Not

Variable2:  

Syntax Expression

Syntax Builder page

Variable1

Enter the name of the first variable.

Operator

Select =, +, -, and so forth from the drop-down list. For example, if you use the = operator, the syntax will check to see whether Variable1 is equal to Variable2 in the syntax expression.

For information about operators, see Using Operands.

Not

Negates the operator. For example, if you use the = operator and select *Not*, the syntax will check to see whether Variable1 is *not* equal to Variable2 in the syntax expression.

Variable2

Enter the name of the second variable.

Syntax Expression

Displays the full syntax expression.



Click the **Select a Variable for Syntax** button to access the Select a Variable for Syntax page and select a variable from the list of variable types.



Click the **Build a Nested Expression** button to access the Nested Syntax Builder (1) page.



Click to return to the previous page and use the syntax expression.



Click to return to the previous page and cancel the syntax expression.

The Syntax Builder can handle a nested expression with a maximum of 20 levels. Here is an example of a double-nested expression:

`((V1, =, V2) , =, (V1, =, V2))`

To build a syntax expression using the Syntax Builder page:
--

1. If the variable is a nested expression click **Nested Expression** so that you can build that segment first.
2. Click the **Select a Variable for Syntax** button to access the Select a Variable for Syntax page and select a Variable Type. For example, Option.
3. Use Search to find a variable name or enter a variable name. For example, if you chose Option as the variable type, the Syntax Builder will put "O-" into the syntax field and add the variable name to the prefix when you return to the Syntax Builder page.
4. When appropriate, select an Operator. To use *Not* in your syntax statement, click the **Not** button.
5. Then build your second variable.


6. As you build the syntax, the pieces fill in the editable fields in the Syntax Expression field. Click **OK** when you are through building your syntax.

Syntax Builder - Select a Variable for Syntax Page

Usage	Use the Syntax Builder - Select a Variable for Syntax page to select a variable from the list of variables.
Object Name	CP_SYNX_SEC_PNL2
Navigation	Click the Select a Variable for Syntax button on the Syntax Builder Page.

Syntax Builder - Select a Variable for Syntax

Variable Selection

☒ **Option** 
☐ **Value List**

☐ **Global**
☐ **MultOpt**

☐ **Secondary**
☐ **External**

☐ **Internal**
☐ **Number**

☐ **Matrix**
☐ **Character**


☐ **Constant**

Syntax Builder - Select a Variable for Syntax page

Select the type of variable to use in the syntax expression. The one you select will enable you to access a list and select a variable.

Click **OK** to return to the Syntax Builder page.

Nested Syntax Builder Page

Usage	Use the Nested Syntax Builder page to build a nested syntax expression.
Object Name	CP_SYNX_SEC_PNL_N1
Navigation	 Click the Nested Expression button on the Syntax Builder Page.

Syntax Builder - Nested Syntax Builder (1) page

The (1) at the top of the page indicates that this is the first level of nested syntax.

Variable1 Enter the name of the first variable.

Operator Select from the list of operators.

For information about operators, see Using Operands.

Not Negates the operator. For example, if you selected the = operator, select this check box to indicate that Variable1 is not equal to Variable2 in the syntax expression.

Variable2 Enter the name of the second variable.



Click the **Select a Variable for Syntax** button to access the Select a Variable for Syntax page and select a variable from the list of variable types.



Click the **Build a Nested Expression** button to access the Nested Syntax Builder (2) page. The (2) indicates that this is the second level of nested syntax.

Syntax Expression Displays the full syntax expression.

Click **OK** to return to the Syntax Builder page.

Understanding Non-Syntax Expressions

Non-syntax expressions are those that the system does not interpret. Use them to display information that isn't the product of a rule operation. You can also use non-syntax expressions for comment lines or for error messages that result from the user's choices.

Understanding Print Codes

PeopleSoft CRM Sales Product Configurator Print Codes enable you to print user-defined configuration information on various reports through your PeopleSoft system. When you add a new Print Code, you designate which report (or reports) you want it to be printed on. For example, if you select Sales Order Report, the information is printed on the Sales Order Acknowledgement. After you create a Print Code, you can use it on the Rule - Page Generation Page (by way of the Page Attributes tab) and on the Rule - Configuration Detail Page. This results in the option details that are set up by those types of rules being printed on the specified reports.

In some instances, the user may have rules that overlay the print code from a previous rule. Following is an example of a table with print codes that will be used in different situations. On this table, PG1 represents the first Page Generation rule that the option is on. PG 2 represents the second Page Generation rule that the option is on.

<i>PG 1</i>	<i>PG 2</i>	<i>Print Code Used</i>
P001	P002	P002
P001	blank	P001
blank	P002	P002
blank	blank	blank

The Option Variable rule is not provided with a print code—it acts like a Page Generation rule with a blank print code.

If both PG1 and PG2 have print codes, the PG2 print code overrides the PG1 print code. If PG1 has a print code and PG2 does not, the report from PG1 is printed.

An option might be printed more than once on a report (and appear more than once in the file.) If you put a print code on the option on the Page Generation Detail, it appears on the print table. If you associate the same option with a Configuration Detail rule, it appears again on the Configuration Detail table.

Print Code Page

Usage	Use the Print Code page to set up print codes (up to 4 characters) and to specify the reports that your information will be printed on.
Object Name	CP_PRINTCD_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Print Code, Print Code

Print Code

SetID: SHARE CORPORATE SETID

***Print Code:** [View All Print Codes](#)

***Print Code Description:**

☒ Sales Order Report

☒ Invoice Report

☒ Pick Plan Report

☒ Packing Slip Report

☐ Production Documents Report

☐ Purchase Order Report

Print Code page

The **SetID** that you entered to access this page is displayed.

Print Code The name of the print code.

Print Code Description A description of the print code.

View All Print Codes Click this link to access the Print Code - All Page.

Select the reports from the list that will be printed for this print code.

Print Code - All Page

Usage	Use the Print Code - All page to display all the print codes and the reports that they will be printed on. You can select or clear reports on this page.
Object Name	CP_PRINTALL_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, All Print Codes, Print Code - All
Access Requirements	When you select All Print Codes from the menu or click View All Print Codes on the Print Code Page, you will see multiple print codes and all of the reports that they will be printed on.

Print Code - All

SetID: SHARE CORPORATE SETID

Print Codes	Sales Order	Invoice Report	Pick Plan	Pack Slip	PID Report	PO Report
ALL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
KIT	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MFG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Print Code - All page

The **SetID** that you entered to access this page appears.

To make changes to the reports that the print codes will print on, select or clear them on this page.

CHAPTER 4

Establishing Configuration Variables

The PeopleSoft CRM Sales Product Configurator is designed to make your rule syntax as uncomplicated as possible, by providing ways to do part of the work in tables of values. If information about a product already exists in any PeopleSoft application, you can retrieve it without any special rule logic by using internal variables. You can validate against lists of options, or you can check for the occurrence of a single value in any of a number of option variables. The most powerful tool for simplifying logic is a matrix, which enables you to predefine result values for up to five variables. Since you have to set them up only once, you save all of the labor and potential for error involved in defining combinations through calculating them in each rule tree. When you want to change your result values, you just change the matrix—not the many rules that reference it.

You can probably set up some of your variable tables now, based on the values and combinations of values that you know you'll use. As you write configuration rules, you'll undoubtedly find more ways that you can use these tables to your advantage.

Using Constants

Constants can be used to reference static system information during your configuration process. The list below details the constants that are available in the PeopleSoft CRM Sales Product Configurator.

Constant Page

Usage	Use the Constant page to display the name and description of a constant. A constant value does not change during processing.
Object Name	CP_CONST_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Constant, Constant



Constant

Constant: BUSINESS_UNIT_IN

*Constant Description: Inventory Business Unit

Constant page

Constant	<p>The name of the constant is displayed. Available constants are:</p> <p><i>BILL_TO_CUST</i> (Bill to Customer ID) <i>BUSINESS_UNIT_IN</i> (Inventory Business Unit) <i>BUSINESS_UNIT_OM</i> (Order Management Business Unit) <i>CP_MODE</i> (Configurator Processing Mode) <i>CURRENT_DATE</i> (Current System Date) <i>DYNAMIC_PRICE</i> (Dynamic Price) <i>ITEM_ID</i> (Item ID) <i>ORDER_LINE</i> (Sales Order Line Number) <i>ORDER_NUMBER</i> (Sales Order Number) <i>PRODUCT_ID</i> (Product ID) <i>QTY_ORDERED</i> (Quantity Ordered) <i>SETID</i> (Configurator Rule SetID) <i>SHIP_TO_CUST</i> (Ship to Customer ID) <i>SOLD_TO_CUST</i> (Sold to Customer ID)</p>
Constant Description	<p>The description of the constant. You can modify this field.</p>

Establishing Internal Variables

Internal variables retrieve values from PeopleSoft application tables and views. This enables you to use business information—customer IDs, order numbers, business unit definitions, and so forth—without defining it within the rules for the PeopleSoft CRM Sales Product Configurator or in separate configurator tables. Instead, you can set up variables that represent field values and tell the system where to look for them.

First, decide which values to retrieve, and set up the internal queries to find them. Then, define the variables to store the resulting values.

Internal Query Page

Usage	Use the Internal Query page to set up fields and bind values to those fields for the tables and views that you want to retrieve data from. Internal Queries within the Product Configurator are used to establish the PeopleSoft application table or view that you want to query and the <i>where</i> clause to use to fetch your information. The <i>where</i> clause for your query is established by populating the fields from the PeopleSoft application table or view that you selected with the Sales Product Configurator variable values.
Object Name	CP_INTRN_KEY_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Internal Query, Internal Query
Access Requirements	Enter the Internal Query, Internal Query Description, or select a Table Name.

Internal Query

Internal Query: PROD_ITEM

*Internal Query Description: PROD_ITEM Table Query

*Table: PROD_ITEM

Table Key(s)			View All	First	1-2 of 2	Last
Field	*Type	*Value				
SETID	Constant	SETID				
PRODUCT_ID	Global Variable	PRODUCT_ID				

Internal Query page

The **Internal Query** name is displayed.




Internal Query Description	The description of the internal query.
Table	The name of the table or view.
Field	The names of the table fields.
Type	Select the field type from the list.
Value	The value for the Field . Click the Add/Update button to add a new value or to update an existing value. The Add/Update button is not available when the type is <i>Constant</i> or <i>Literal</i> .



Internal Variable Page

Usage	<p>After setting up an internal query to the table that holds the values that you need, use the Internal Variable page to assign a name to the internal variable that retrieves a specific field for that table.</p> <p>Internal Variables within the Sales Product Configurator are used to establish which field to fetch from a Sales Product Configurator Internal Query Page.</p>
Object Name	CP_INTRN_VAR_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Internal Variable, Internal Variable
Access Requirements	Enter a SetID.

Internal Variable

SetID: SHARE CORPORATE SETID
Variable: BASE_PRICE
***Variable Description:** Base Price from PROD_PRICE [Go to Internal Variable Tester...](#)

***Internal Query:** PROD_PRICE  
***Field:** LIST_PRICE 
Table: PROD_PRICE

Where... [Find](#) | [View All](#) First  1-3 of 6  Last

Field	Type	Value
SETID	Constant	SETID
PRODUCT_ID	Constant	PRODUCT_ID
UNIT_OF_MEASURE	Literal	EA


Internal Variable page

The **SetID** and **Variable** that you entered to access this page are displayed.


Variable Description

Description of the internal variable.

Internal Query

Click  to access a list of table names to select from, or click the **Add/Update** button to add a new internal query field or to update an existing value.

Field

Click  for a list of system field names on the table.

Table

Displays the table name that is associated with the internal query.

Click on the **Go to Internal Variable Tester** link to go to the Internal Variable Test page.

Internal Variable Test Page

Usage	You can use the Internal Variable Test page to test the setup of Internal Variables within the product configuration. With the Internal Variable Test page, the product configuration variables that will automatically populate when an internal variable is referenced during the configuration process can be manually entered and executed. Set up values for each field, and click Execute Query.
Object Name	CP_INTRN_QRY_WIZ
Navigation	Define Business Rules, Maintain Product Configurator, Use, Internal Variable Test, Internal Variable Test
Prerequisites	Set up internal queries and internal variables.
Access Requirements	Select the SetID, Variable, Variable Description, Internal Query, and System Field Name.

Internal Variable Test

SetID: SHARE CORPORATE SETID
Variable: ORDER_DATE Get Order Date from ORD_HEADER
Field: ORDER_DATE
Internal Query: ORD_HEADER ORD_HEADER Table Query
Table: ORD_HEADER

Where...	
Field	Value
BUSINESS_UNIT	US008
ORDER_NO	72566-CFB

Query Result: NO RESULTS FOUND.
 Execute Query

Internal Variable Test page

The **SetID** and other information that you entered to access this page is displayed. That information might include the **Variable**, **Field**, **Internal Query**, or **Table**.

Field	List of the keys from the application table on the Internal Query.
Value	Assign a test value for each field. During the configuration process, these values will be populated with the configuration variable value that was specified on the Internal Query definition.
Execute Query	Click this button to run the query and test the internal variable with the entered values.
Query Result	Displays the result of the test query. If the internal variable setup is incorrect, an error message will be displayed. If the entered values do not return any data, then a “No Results Found” message will be displayed.

Establishing Option Variables

Option variables contain a value that is entered by the user on a page (within Sales Order Entry) or created by an Option Variable rule. The value is available for rules processing. After you define option variables, they apply only to one configured level of processing (the same as secondary variables), but they can be referenced across functional areas.

Option Variable Page

Usage	Use the Option Variable page to display an existing option variable or to create a new option variable.
Object Name	CP_OPT_VAR_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Option Variable, Option Variable
Access Requirements	Enter a SetID, Variable, and Variable Description.

The screenshot shows the 'Option Variable' page with the following fields and values:

- SetID:** SHARE CORPORATE SETID
- Variable:** BFRAME_COLOR
- *Variable Description:** Frame Color
- *Type:** Character (selected from a dropdown menu)
- *Length:** 3
- Decimals:** 0

Option Variable page

The **SetID** and **Variable** that you entered to access this page are displayed.

Variable Description

A user-defined description of the variable.

Type

In the **Type** field, specify whether the matrix result field type is **Character** or **Numeric**.

Length

Length defines the number of characters that are allowed for each variable that is associated with the key. The maximum length of a character type is **15** characters.

Decimals

If the **Type** is numeric, you need to specify its **Decimal** precision. The range of decimal precision is **11,4** through **8,7**.

Warning. The decimal precision defined for the key must match the decimal precision of the values that are associated with the key.

Establishing Global Variables

Global variables apply to all configured levels of processing and can be referenced across functional areas. Using global variables enables you to share variable information between a parent item and its configured components or between a child item and any other child items that follow it in rules processing. They are also shared between the Distribution rule tree and the Production rule tree.

You create global variables through Global Variable rules within the rule tree.

For more information about defining global variables, see Rule - Global Variable Page.

Global Variable Page

Usage	Use the Global Variable page to display an existing global variable or to create a new global variable.
Object Name	CP_GBL_VAR_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Global Variable, Global Variable
Access Requirements	Enter a SetID, Variable, and Variable Description.

Global Variable

SetID:

SHARE CORPORATE SETID

Variable:

COST

*Variable Description:

Bike Cost

*Type:

Number

*Length:

6

Decimals:

2

Global Variable page

The **SetID** and **Variable** that you entered to access this page are displayed.

Variable Description	A user-defined description of the variable.
Type	In the Type field, specify whether the matrix result field type is Character or Numeric .
Length	Length defines the number of characters that are allowed for each variable that is associated with the key. The maximum length of a character type is 15 characters.
Decimals	If the Type is numeric, you need to specify its Decimal precision. The range of decimal precision is 11,4 through 8,7 .

Warning. The decimal precision defined for the key must match the decimal precision of the values that are associated with the key.

Establishing Secondary Variables

You can define a variable that acts as a temporary working storage field within a rule tree. After you define the variable, you can use it in rule syntax. Create a secondary variable when you want the variable to apply locally—that is, only to the single configured component. You create secondary variables through Secondary Variable rules, Internal Variable Override rules, or Availability Date rules within the rule tree.

For more information about defining secondary variables, see Rule - Secondary Variable Page.

Secondary Variable Page

Usage	Use the Secondary Variable page to display an existing secondary variable or to create a new secondary variable.
Object Name	CP_SEC_VAR_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Secondary Variable, Secondary Variable
Access Requirements	Enter a SetID, Variable, and Variable Description.

Secondary Variable	
SetID:	SHARE CORPORATE SETID
Variable:	PRICE
*Variable Description:	Price
*Type:	Number
*Length:	6
Decimals:	2

Secondary Variable page

The **SetID** and **Variable** that you entered to access this page are displayed.

Variable Description	A user-defined description of the variable.
Type	In the Type field, specify whether the matrix result field type is <i>Character</i> or <i>Numeric</i> .
Length	Length defines the number of characters allowed for each variable associated with the key. The maximum length of a character type is 15 characters.
Decimals	If the Type is numeric, you need to specify its Decimal precision. The range of decimal precision is 11,4 through 8,7 .

Warning. The decimal precision defined for the key must match the decimal precision of the values that are associated with the key.

Establishing Value List Variables

Value-list variables validate options selection during rule processing. Value-list variables are lists of values to which the system can compare the options that are used in configurations—such as valid colors or sizes of an item.

By checking against the value list, the system determines whether an entered value is valid, without complex validation statements. The value list table also prompts the user with a list of valid values for a field. You can set up constraints to validate complex interrelationships between product options.

Define the value-list table values when you set up value-list tables for processing. Value-list tables apply within a given setID. You can define as many or as few as you like and use them in any item configuration within the setID.

To set up validation of an option, enter the options on the Page Generation Rule Detail page, and create a corresponding value-list table. For example, if COLOR is a variable name on the Page Generation Detail page, then the Value List table for COLOR lists all of the possible colors that a customer can select. When the customer selects a color on the list, it is

immediately validated from the Value List table. If it is not on the list (that is, not valid), a message is displayed.

Note. To use a different language, set up a language-specific user logon for the person who will use the new language. A user in France might have a logon of FR1 set to use the French language, and another user in Brazil might have a logon of BR1 set to use Brazilian Portuguese. When these users log on, fields will display in the specified language, and related language tables can be used for Page Generation rules and Value Lists.

Value List Page

Usage	Use the Value List page to display an existing value list or to create a new value list.
Object Name	CP_USERCD_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Value List, Value List
Access Requirements	Enter a SetID, Value List, and Value List Description.




Value List

SetID: SHARE CORPORATE SETID
Value List: BCOLORS
*Value List Description:
Image Base URL:

Value List			Find View All	First	1-5 of 5	Last
*Value	*Long Description	Image				
BLK	Ebony Pearl Blk	CP_BLACK.JPG		+	-	
BLU	Deep Ocn Blue	CP_BLUE.JPG		+	-	
GRN	Rain Forest Grn	CP_GREEN.JPG		+	-	
RED	Fire Engine Red	CP_RED.JPG		+	-	
WHT	Mntrn Snow White	CP_WHITE.JPG		+	-	


Value List page

The **SetID** and **Value List** that you entered to access this page are displayed.

Value List Description	A user-defined description of the value list.
Image Base URL	The base URL for the images used with this value list. If this field is blank, then the system uses webserver <PSHOME>\CACHE\IMAGES.
Value	The Value exactly as you want it to be displayed in the table.
Long Description	A long description of the Value . The description is generally just for information, but you can use it instead of the actual value in configuration codes.
Image	Enter the name of the file (that exists in the Image Base URL) that contains an image. The image will be displayed on Page Generation rules for options with a control type of <i>Radio Button</i> only. An Image is for information only. The file name is limited to 40 characters with an extension. An image file can be any browser-supported image.
	Click the View Image button to display the value list image.
	Click the Add button to add a line below the current line.
	Click the Delete button to delete the current line.

For more information about using Value List descriptions in configuration codes, see *Working with Configuration Codes*.


Value List - View Image Page

Usage	Use the View Image page to display the image associated with a value list.
Object Name	CP_USER_CD_IMG_SEC
Navigation	 Click the View Image button on the Value List page.

Value List - View Image

SetID: SHARE **Value List:** BCOLORS **Long Description:** Deep Ocn Blue

Image: CP_BLUE.JPG

 BLU - Deep Ocn Blue

Return

Value List - View Image page

SetID	SetID from the value list page.
Value List	Value list name.
Long Description	Description of the value list.
Image	Name of the file containing the image that is related to the value list value.

Click **Return** to return to the Value List page.

Understanding Constraints

A *constraint* is a series of conditions that limit the valid values in a value list. You can have one or more conditions in a constraint that will limit the acceptable choices for the value of an option, based on the condition. However, the system will use the constraint from the first *true* condition statement that results from the constraint sequence. If all of the conditions in a constraint sequence resolve with *false*, then no constraints are placed on the value list, and the entire value list is used for validation.

For example, you might have a value list, COLORS, that contains all of the possible colors for the bikes that you sell (Red, Blue, Black, Silver, Gray, and White). However, you have a constraint condition that you can paint only titanium bikes, using silver, gray, and black paint. In addition, you have a constraint condition that you can paint only aluminum bikes, using red, blue, gray, white, and black paint. Using that information, you can set up one constraint with two conditions. The first condition checks to see if the bike is titanium. If it is, then only silver, gray, and white are selected from the COLORS value list. The second condition checks to see if the bike is aluminum. If it is, then only red, blue, gray, white, and black are selected from the COLORS value list. If the bike is neither titanium nor aluminum, then the entire value list of COLORS is available, because there is no constraint on that condition.

Constraints are associated with value list variables on Page Generation rules. During option entry, the valid values for drop-down list boxes and radio buttons can be determined, based on value lists, in conjunction with any constraints that are applied to them.

Constraints allow for dynamic value list prompting. If the result of syntax evaluation for a particular condition is true, then a new value list that is a subset of the original value list is created and used.

Constraints also allow for configured validation messages to be displayed.

Note. To use a different language, set up a language-specific user logon for the person who will use the new language. A user in France might have a logon of FR1 set to use the French language, and another user in Brazil might have a logon of BR1 set to use Brazilian Portuguese. When these users log on, fields and messages will be displayed in the specified language, and related language tables can be used for Page Generation rules and Value Lists.

Constraint Page

Usage	Use the Constraint page to validate option selections during option entry.
Object Name	CP_CONSTRT_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Constraint, Constraint
Access Requirements	Select a SetID, Constraint, Constraint Description, and Value List.

Constraint

SetID: SHARE CORPORATE SETID
Constraint: BFRMCOLORS
*Description: Bike Frame Colors
*Value List: BCOLORS Frame Color

Constraint Information

Find | View All First 1 of 2 Last

Condition

(O-BFRAME_MAT,="CFB")

☒ Use Custom Error Message
Error Message
Only Red, Black, and White Frames are available in Carbon Fiber.




Value List Value(s)

Find | View All First 1-3 of 3 Last

*Value			
BLK		Ebony Pearl Blk	
RED		Fire Engine Red	
WHT		Mntn Snow White	

Constraint page

The **SetID** and **Constraint** information that you entered to access this page is displayed.

Description	Description of the constraint.
Value List	The name of the value list that is associated with this constraint. Select a value from the list or click the Add/Update button to create a new value list or to update an existing value list.
Condition	The condition to be evaluated to determine which value list subset to use.
	Click the Syntax Wizard to use the wizard to create the syntax.
Use Custom Error Message	Select this check box to enter a validation error message. If this check box is not selected, the application will use a default error message.
Error Message	Enter an error message.
Value List Value(s)	The subset and values from the value list to use with this condition. Click  to add a value or  to delete a value.

Establishing Multiple Option Variables

A Multiple Option variable provides a list of options that you can check, to see whether any of them has a specific value. Multiple Option variables do not validate variables as do Value List variables. Rather, they group Option Variables so that you can examine them as a group, to find out whether a particular value exists.

For example, your rules might use two option variables for the color of a configured bike:

- Frame (FRAME_COLOR)
- Seat (SEAT_COLOR)

For component purposes, you might not care what color any particular part of the bike is, but you do want to know whether you need red paint. The Multiple Option variable that contains these two option variables enables you to build a rule (using the Exists on Multiple Options Operator) that verifies whether either of the option values is RED.

You define multiple option variables when you set up Multiple Options tables for processing.

Multiple Option Page

Usage	Use the Multiple Option page to display an existing multiple option variable or to create a new multiple option variable.
Object Name	CP_MULT_OP_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Multiple Option, Multiple Option
Access Requirements	Enter a SetID and Multiple Option.

Multiple Option

SetID: SHARE CORPORATE SETID
Multiple Option: WHEEL_COMPONENTS
***Description:**

Select Option Variables

Find | View All First 1-3 of 3 Last

*Option Variable	Variable Description		
<input type="text" value="BWHEEL_TYPE"/>	Wheel Type		
<input type="text" value="WRIM_TYPE"/>	Rim Type		
<input type="text" value="WSPOKE_MAT"/>	Spoke Material		

Multiple Option page

The **SetID** and **Multiple Option** information that you entered to access this page is displayed.

Description

Enter a **Description** of the table.

Option Variable

Enter the option name, as you will use it in rules processing. Select a value from the list, or click the **Add/Update** button to create a new option variable or to update an existing value. The variable description is displayed.



Click the **Add** button to add an option variable row.



Click the **Delete** button to delete an option variable row.

Establishing Literals

Literals are used to enter static information into your configuration logic. You can enter literals on internal queries. You can also use literals to insert a string of characters into a configuration code template definition.

Note. Quotation marks are not needed around literals on internal queries.

In the following example of a Template page, a literal is used to add a hyphen as a separator between other variables (such as the bike shirt type and bike glove type). The Value fields (in the example following) with sequence numbers 2, 4, and 6 add hyphens between option variable names.

Template Attributes					Find View All
*Sequence	*Type	*Value	*Length	*Description	
1	Option Variable	BK_SHIRT_TYPE	10	Bike Shirt Type	
2	Literal	-	1	-	
3	Option Variable	BK_GLOVE_TYPE	3	Bike Glove Type	
4	Literal	-	1	-	
5	Option Variable	BK_PUMP_TYPE	5	Bike Pump Type	
6	Literal	-	1	-	

Example of Template page with literals separating option variables

Establishing External Program Variables

We recommend that only advanced users use external program variables. You can use these variables to call a program outside of PeopleSoft applications, compute a value in the other application, and return the value to the PeopleSoft CRM Sales Product Configurator to use in processing.

The external program variable is used in conjunction with the Create Parameter rule to call an external program that can perform user-defined logic. The external program passes a maximum of 20 parameters created with the Create Parameter rule. After the external program runs, the parameters are cleared.

External Program variables are used in syntax only. P- is used as a prefix for the name of the external program, to specify that it is an external program variable. For example, the P-CPPITEST external program variable uses P- to specify that this is an external program variable.

In Distribution configurations, the external program name represents the name of a business interlink DLL function. A Microsoft Visual Basic program example is shipped with PeopleSoft CRM Sales Product Configurator. The sample DLL is named PSCPEXTP. You can add logic to PSCPEXTP, to have it return the value to fit your needs.

In Production configurations, the External Program variables reference a COBOL executable. External programs use the parameters that are created with the Create Parameter rule as input. CPPITEST is a sample external COBOL program to call. The source code for this sample COBOL program is shipped with the PeopleSoft CRM Sales Product Configurator. It calculates pi to a parameter-specified number of decimal places. You can modify the sample program (CPPITEST) to fit your needs. COBOL program names can be a maximum of 8 characters.

Establishing Matrix Variables

A PeopleSoft CRM Sales Product Configurator matrix is a table that associates a combination of keys with a unique result value. In effect, the matrix takes the place of a series of rules for different combinations of variable values. Matrix variables enable you to invoke result values from a predefined matrix of up to five other variable values. You can, for example, define the value of combinations of prices, quantities, or options, and then call that value in rule syntax—without listing every possible combination in rules.

You can define an unlimited number of matrixes to configure your products in either the Distribution or Production processes. Define matrix variables when you set up the matrixes for rule processing. Within a matrix, you can define unlimited numbers of values for specific options, variations, or variables.

Matrix Header Page

Usage	The Matrix Header page contains all of the information for identifying a matrix and controlling how the system applies it.
Object Name	CP_MTX_HDR_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Matrix Header, Matrix Header
Access Requirements	Select a SetID and Matrix.

Matrix Header

SetID: SHARE CORPORATE SETID

*Status: Active

Matrix: BIKE_DISC

*Description: Bike Discounts

*Type: Number

*Length: 3

Decimals: 2

[Go to Matrix Detail...](#)

Matrix Key Information

*Variable Code Type	*Matrix Key Variable	*Matrix Key Description	*Operator
Option Variable	BFRAME_COLOR	Frame Color	=
Option Variable	BFRAME_SIZE	Frame Size	<=
Option Variable	BWHEEL_TYPE	Wheel Type	=

Matrix Header page

The **SetID** and **Matrix** information that you entered to access this page is displayed.

Status	<i>Active</i> or <i>Inactive</i> . You can inactivate the current matrix by selecting <i>Inactive</i> .
Description	Enter a matrix Description to help you identify the matrix.
Type	In the Type field, specify whether the matrix result type is <i>Character</i> or <i>Number</i> .
Length	The length of the result.
Decimals	If the Type is <i>Number</i> , you need to specify its Decimal precision. The range of decimal precision is <i>11,4 through 8,7</i> .

Warning. The decimal precision defined for the key must match the decimal precision of the values that are associated with the key.

Go to Matrix Detail Click this link to display the Matrix Detail Page.

Matrix Key Information

The **Matrix Key Information** area enables you to specify up to five matrix keys and their characteristics. To correctly prioritize the default values for when the variable values do not match matrix combinations, always order the keys from the most important (in determining the result) to the least important.

Variable Code Type	For each key that you want to define, select the kind of variable (<i>Global</i> , <i>Option</i> , <i>Internal</i> , or <i>Secondary</i>) from the drop-down list in the code field.
Matrix Key Variable	Enter a Matrix Key Variable name based on the Variable Code Type . Click the Add/Update button to update the matrix key variable. The Add/Update button is only present if no matrix detail exists for the matrix key variable (for example, when you are creating a new header).
Matrix Key Description	Enter a description of up to 20 characters to help identify the variable for maintenance and inquiries.

Operator

For each key, the operator will be one of the following:

= Equal to. Set the **Operator** for variables that have character values to =.

<= Less than or equal to.

>= Greater than or equal to.

The operator makes data entry more efficient by eliminating the need for every possible combination of values. Instead, it enables you to create levels of data within which the individual key combinations might fall.



Click the **Key Detail** button to display the Matrix Header - Key Detail page.

The **Operator** evaluates the values associated with the key, compared to the variable. For example, you might define a matrix with one key, Quantity, to retrieve a price. The data might look like this:

<i>Quantity</i>	<i>Price</i>
0	100
10	200
20	300
30	400

If the **Operator** for the key is <=, an order with a Quantity of 8 returns a Price of \$100 (the nearest value less than or equal to 8 is 0). However, if the **Operator** is =, the matrix does not return a value because the value 8 is not associated with the Quantity key.

Matrix Header - Key Detail Page

Usage	Use the Key Detail page to display the details for the specific matrix key. When you are creating a matrix header, you can override the default attributes that are associated with a key value; however, this can invalidate your matrix.
Object Name	CP_MTX_HDR_SEC
Access Requirements	Click the Key Detail button on the Matrix Header page.

Matrix Header - Key Detail	
SetID:	SHARE CORPORATE SETID
Matrix:	BIKE_DISC
Description:	Bike Discounts
<hr/>	
Variable:	BFRAME_COLOR
Description:	Frame Color
*Type:	Character
*Length:	3
Decimals:	0
<hr/>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Matrix Header - Key Detail page

The **SetID**, **Matrix**, and **Variable** information you entered to access this page is displayed along with the descriptions of the matrix and variable.

Type	In the Type field, specify whether the matrix result field type is <i>Character</i> or <i>Numeric</i> .
Length	Length defines the number of characters allowed for each variable associated with the key. The maximum length of a character type is 15 characters.
Decimals	If the Type is numeric, you need to specify its Decimal precision. The range of decimal precision is 11,4 through 8,7 .

Warning. The decimal precision defined for the key must match the decimal precision of the values that are associated with the key.

Warning. When creating a matrix header, you can override the default attributes that are associated with a key value on the Key Detail page. This can invalidate your matrix.

Click **OK** to return to the Matrix Header page.

Matrix Detail Page

Usage	After you create the keys on the Matrix Header, you can store valid key combinations and their associated result field values on the Matrix Detail page. To update or display values for the matrix, you can select Go to Matrix Detail on the Matrix Header page.
Object Name	CP_MTX_DETL_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Matrix Detail, Matrix Detail

Matrix Detail

SetID: SHARE CORPORATE SETID
Matrix: BIKE_EXAMPLE Bike Matrix Example
Effective Date: 08/14/2000 [Go to Matrix Test](#)

Matrix Detail Information				Find View All		First	1-7 of 7	Last
Frame Color	Frame Material	Frame Size	*Value					
*	*	*	100	+	-			
BLK	*	*	150	+	-			
BLK	CFB	30	200	+	-			
BLK	STL	40	250	+	-			
RED	CFB	*	300	+	-			
WHT	ALM	25	350	+	-			
WHT	CFB	*	400	+	-			

Matrix Detail page

The **SetID** and **Matrix** information that you entered to access this page is displayed along with the effective date and description of the matrix. Click the **Go To Matrix Test** link to access the Matrix Test page.

Matrix Detail Information

Key fields

In the editable key fields for the matrix detail, enter the variable values for each key. (In the sample Matrix Detail page preceding, the key fields are **Frame Color**, **Frame Material**, and **Frame Size**.)

Value

Define the matrix return **Value** for the preceding combination of key fields.

Note. You can define blank values and their associated result values within valid key combinations. Use blank values for concatenation and string manipulation processing with configuration matrices.

Matrix detail records are uniquely identified by an effective date. You can access, copy, or test the matrix detail information based on the effective date.

You can preset multiple detail sets that will activate automatically, based on an effective date. Before entering the detail page, enter an effective date in the search record pop-up menu. That creates a new detail page for the selected matrix or if it already exists, it gives the option of updating the current one. The date field indicates when this matrix is or was valid.

Matrix Test Page

Usage	Use the Matrix Test page to test the matrix. You can enter a test value or values, and when you click Calculate Result, a matrix value (or an error message) is returned.
Object Name	CP_MTX_DETL_WIZ
Navigation	Click the Go to Matrix Test link on the Matrix Detail page.

Matrix Test

SetID: SHARE CORPORATE SETID
Matrix: BIKE_EXAMPLE Bike Matrix Example
Effective Date: 08/14/2000

Matrix Key Description	Returned Key(s)	Operator	Test Value(s)
Frame Color	RED	=	<input type="text" value="RED"/>
Frame Material	CFB	=	<input type="text" value="CFB"/>
Frame Size	*	=	<input type="text" value="42"/>

Returned Matrix Value: 300

Matrix Test page

The **SetID** and **Matrix** information you entered to access this page is displayed along with the effective date and description of the matrix.

Matrix Key Description

A description of each matrix key. This description is established on the Matrix Header page.

Returned Key(s)

The keys in the matrix.

Operator

The operator is =, <=, or >=. The operator is established on the Matrix Header page.

Test Value(s)

Enter a test value or values for your matrix keys. You can enter one value per key for up to five keys.

Calculate Result	Click this button to get the Returned Matrix Value. If your test values are not correct (in type, length, or decimals), the application returns a message describing the problem.
	For more information about the results for test values, see Understanding Matrix Default Hierarchy.

Returned Matrix Value	This is the value or message that returns when you click Calculate Result .
------------------------------	--

Matrix Copy Page

Usage	Use the Matrix Copy page to copy matrix details.
Object Name	CP_MATRIX_COPY_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Matrix Detail Copy, Matrix Copy

Matrix Copy

*SetID:

SHARE

CORPORATE SETID

*Matrix:

BIKE_COLORS

Bike Color Components

*1. Effective Date To Copy From:

05/11/2000

*2. Effective Date To Copy To:

08/16/2000

3. Press to Copy Matrix ...

Matrix Copy page

SetID	Select a setID.
Matrix	Select a matrix to copy from.
1. Effective Date To Copy From	Select the matrix detail effective date to copy from.
2. Effective Date To Copy To	Enter a date or use the calendar to select the effective date to copy to.
3. Press to Copy Matrix...	Click this icon to copy the matrix.

Understanding Matrix Default Hierarchy

In establishing your matrix, you can specify default results for when the system fails to find specific valid key value combinations. Furthermore, you can define *different* defaults for

when none of the values or when some of the values are found on the matrix. The order of the keys on the matrix controls the way that the system structures default values.

When the system checks the matrix, this is the order of the search:

- First, It looks for a result value that is associated with the values for all of the keys.
- If that fails, it tries again, but uses an asterisk (*) for the last key on the matrix.
- If it still fails to find a valid combination, it leaves an * in the last two keys and tries again. It repeats this process until either the remaining combination gives a result or all of the keys contain an *.
- If a result value is defined for all * keys, that value is the default. If a result value is not defined, the inference engine fails.

For example, for a matrix in which the keys are Frame Color, Frame Material, and Frame Size, you might enter rows with the following values:

Matrix Detail Information			
Frame Color	Frame Material	Frame Size	*Value
*	*	*	100
BLK	*	*	150
BLK	CFB	30	200
BLK	STL	40	250
RED	CFB	*	300
WHT	ALM	25	350
WHT	CFB	*	400

Example of Matrix Detail page with bicycle frame keys and values

The return values in the Value column represent different levels of defaults, depending on which values in the combination don't match up with the ones defined on the matrix. Here's how the return values appear for some key values:

Frame Color	Frame Material	Frame Size	Value
BLK	CFB	30	200
BLK	STL	25	150
RED	CFB	40	300
WHT	STL	30	100

If the system does not find a value in the *first* key that matches the variable value, the return value is the value for all asterisk (*) keys, if you've defined one.

CHAPTER 5

Establishing Common Rules

While many of the rule types that PeopleSoft provides with the PeopleSoft CRM Sales Product Configurator are specific to creating a sales order, calculating prices, assigning costs, or manufacturing processes, the common rules are tools that enable all of your other logic.

Some rules are used in only one of the functional areas, but common rules are used in both Distribution and Production. To set up an efficient Distribution configuration, you need to familiarize yourself with the rules in this section (the common rules) and the rules in Establishing Distribution Rules. To go on to Production Configuration, you also need to read Establishing Production Rules.

For an example of putting rules together for configuration, see [Preparing To Create Rules](#).

Most rule pages include fields that can use syntax.

For information about the Syntax Builder, see the [Syntax Builder Page](#).

Using the Rule Page

You create and maintain all rules using the Rule page and its links. While the rule details pages vary depending on the type of rule that you define, the basic Rule page is the same for all rule types, except for Page Generation.

For more information about the Rule - Page Generation Rule page, see [Overview of the Page Generation Rule](#).

Rule Page

Usage	Use the Rule page to define the basic characteristics of the rule, including the specific rule and the condition for it to process.
Object Name	CP_RULE_HEADER_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Rule, Rule
Access Requirements	Specify the SetID and Functional Area (Distribution or Production).

Rule

SetID: SHARE
Functional Area: Distribution
*Status: Active

Rule: BCD-20
*Rule Description: Print Aluminum Price

Rule Attributes

*Action Code: Configuration Detail
[Go to Rule Details...](#)

Condition
(O-BFRAME_MAT,="ALM")

Rule Miscellaneous

[Rule Processing Modes](#)
[Rule Comments](#)
Rule Copy

[Rule Effective Dates](#)
[Rule Keywords](#)
[Rule Delete](#)

Rule page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Status	Valid values are <i>Active</i> and <i>Inactive</i> . Status is a required field.
Rule Description	A user-defined description of the rule is required. This description appears on reports and in rule inquiries.
Action Code	An action code is required. It defines which kind of action the rule will perform. Select an Action Code from the drop-down list.
Condition	A syntax expression of the condition that will be tested to determine whether to process the rule. The condition must evaluate to a 0 for <i>false</i> or a 1 for <i>true</i> .

Common Links for the Rule Page

The Rule page links to several pages that are described in this section:



Click the **Syntax Wizard** button to access the Syntax Builder Page, where you can create and maintain the syntax expressions to use in Sales Product Configurator rules.

Rule Details

Links to the page that defines the details for the specified rule, (that is, it defines exactly what the rule does.)

Rule Processing Modes

Use in one or more of three available modes: Order Entry, Production Direct, or Requisition Generation.

Rule Effective Dates

Define the effective and obsolete dates.

Rule Comments

Use the Comments page to describe the purpose or logic of the rule.

Rule Keywords

Enter up to five search keys for each rule.

Rule Copy

When you are adding a new rule, you can click the **Rule Copy** link and enter the rule, to copy or select a rule from a list.

Rule Delete

Delete the rule by clicking **Rule Delete**.

Rule Detail Pages

The Rule Details pages provide broad functionality in creating and maintaining your rules for Sales Product Configurator.

Rule - Rule Processing Modes Page

Usage	Use the Rule Processing Mode link to select one of the three rule-processing modes. For example, if you want the rule you are creating to be active only during order entry, select the Use in Order Entry check box.
Object Name	CP_RULE_MODE_SEC
Navigation	Click the Rule Processing Modes link on the Rule page.
Access Requirements	Select a SetID, Functional Area, Rule, Action Code, and Rule Description.

Rule - Rule Processing Modes

SetID: SHARE **Functional Area:** Distribution **Rule:** BCD-20

Rule Processing Modes

☒ **Use in Order Entry**

☒ **Use in Production Direct**

☒ **Use in Requisition Generation**



Rule - Rule Processing Modes page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Use in Order Entry	Select Use in Order Entry to use this rule during sales order entry in PeopleSoft Order Management and PeopleSoft eStore if you integrate with those applications.
Use in Production Direct	Select Use in Production Direct to use this rule for generating configuration direct production orders in PeopleSoft CRM Sales Product Configurator.
Use in Requisition Generation	Select Use in Requisition Generation to use this rule for generating configuration direct requisition orders in PeopleSoft CRM Sales Product Configurator.
OK	Click to save edits return to the Rule page.
Cancel	Click to cancel edits return to the Rule page.

Rule - Rule Effective Dates Page

Usage	Use the Rule Effective Dates page to define the effective dates for the rule. The dates from the Effective Date to the Obsolete Date are the effective dates for a rule to process.
Object Name	CP_RULE_EFFDT_SEC
Navigation	Click the Rule Effective Dates link on the Rule Page.

Rule - Rule Effective Dates		
SetID:	SHARE	Functional Area: Distribution
		Rule: BCD-20
Rule Effective Dates		
Effective Date:	<input type="text" value="01/01/1998"/>	
Obsolete Date:	<input type="text" value="12/31/2001"/>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>		

Rule - Rule Effective Dates page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access the page appear.

Effective Date The first date that the rule becomes effective.

Obsolete Date The date that the rule becomes obsolete. The rule is not processed after the specified date.

You can override default dates by entering new dates or selecting the down arrow to bring up the calendar. Effectivity date processing is compared against calculated dates when the rule becomes effective and when it becomes obsolete.

Effective dating is helpful if you know ahead of time that you are going to replace a rule. For example, you use Red-01 paint for all of your logos that you put on your bikes, but engineering changes are going to require that you switch to Red-02 in a few months. Enter the current date as the effective date for the component Red-01, and define the Obsolete date with the date you intend to stop using that paint.

For order entry, the default effective date is the order date. For direct production and direct requisition, the default effective date is today's date. For production rules, the default effective date is the production start date estimate – that is, the scheduled ship date minus the estimated lead time.

OK Click to save edits return to the Rule page.

Cancel Click to cancel edits return to the Rule page.

For more information about effective dates, see Using Rule Processing Modes

Rule - Rule Comments Page

Usage	Use the Rule Comments page to describe the purpose or logic of the rule. You can also insert comments regarding why certain rules were entered or are inactive.
Object Name	CP_RULE_COMMENT

Navigation	Click the Rule Comments link on the Rule Page.
------------	--

Rule - Rule Comments

SetID: SHARE **Functional Area:** Distribution **Rule:** BCD-20

Rule Comments

This rule prints the additional amount if the aluminum frame is chosen as an option.

OK Cancel

Rule - Rule Comments page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Rule Comments

Describe the purpose or logic of the rule.

Note. You can access existing comments using the Rule Comments link on the Rule page.

OK

Click to save edits return to the Rule page.

Cancel

Click to cancel edits return to the Rule page.

Rule - Rule Keywords Page

Usage	Use the Rule Keywords page to help narrow searches during rules reporting or inquiries. For search fields, use any type of information that will help you identify rules or their properties. For example, you may use information such as the name of the rule's author, the date that the rule was created, or the table that it references for a variable value.
Object Name	CP_RULE_SKEYS
Navigation	Click the Rule Keywords link on the Rule Page.

Rule - Rule Keywords

SetID: SHARE **Functional Area:** Distribution **Rule:** BCD-20

Rule Keywords

LT5010 PRINT PRICE

Rule - Rule Keywords page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Rule Keywords	You can enter up to five search keys for each rule.
OK	Click to save edits return to the Rule page.
Cancel	Click to cancel edits return to the Rule page.

Rule - Rule Copy Selection Page

Usage	Use the Rule Copy page to copy a rule. After you copy the rule into the page, you can modify it to create your new rule. The copied rule must have the same functional area as the new rule.
Object Name	CP_RULCPY_SECPNL
Navigation	Click the Rule Copy link on the Rule Page.
Prerequisites	You must be adding a new rule for the Rule Copy Selection link to be visible.

Rule - Rule Copy Selection

SetID: SHARE **Functional Area:** Distribution **Rule:** TEST2

Rule to Copy

Copy Rule: BCD-25A

Rule - Rule Copy Selection page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Copy Rule	When you are adding a new rule, you can click the Rule Copy link and enter the rule to copy, or select a rule from a list.
OK	Click to copy the rule and return to the Rule page for the new rule.
Cancel	Click to cancel edits return to the Rule page.

Rule - Rule Delete

You can click this link to delete a rule. To be eligible for deletion, the rule must be inactive and it must not exist on any rule tree. To make a rule inactive, change the status to *Inactive* on the rule page and save the page. The system deletes the rule when you click Rule Delete.

This option is unavailable on the Add page.

Rule - Syntax Builder Page

Use the Syntax Builder page to create and maintain the syntax expressions to use in PeopleSoft CRM Sales Product Configurator rules. To access the Syntax Builder page, click Syntax Wizard button on the Rule Page.

All Sales Product Configurator syntax is in this format:

```
{not} (Variable 1, Operator, Variable 2)
```

The *not* is optional.

For information about the Syntax Builder, see Syntax Builder Page.

Adding Rule Details

The information that is needed on a rule detail page for the common configuration rules varies, depending on the type of rule that you are creating. In this documentation, we explain the detail page for each common rule, along with the rule description.

Most rule detail pages include fields that can use syntax.

For information about the Syntax Builder, see Syntax Builder Page. **For more information** about all types of rules, see the table in Syntax Builder Page.

Overview of the Condition Rule

Each rule (except a Page Generation rule) has a condition statement to determine whether or not the rule processes.

The Condition rule processes depending on whether the system interprets its condition as true or false. To apply the Condition rule to subsequent rules as a substitute for individual condition statements, leave the Condition field for the subsequent rules blank. The system then automatically interprets the individual conditions as true.

For example, if you are installing a battery-operated light on your configured bike, you need both the light and the batteries. When you use a Condition rule, you need to specify the syntax for the condition only once, for the light. The execution of the rule tree causes the batteries to be added to the component list, and installation of the light is added to the operation sequence list.

To set up a Condition rule, complete the information on the Rule page.

Rule - Condition Page

Usage	Use the Rule page for the Condition rule to create a condition that can substitute for individual condition statements on other rules.
Object Name	CP_RULE_HEADER_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Rule, Rule
Access Requirements	Select Condition as the Action Code when you are defining parameters to access the Rule page.

Rule

SetID: SHARE Functional Area: Distribution *Status: Active

Rule: BKDATES-00 *Rule Description: Branch for Date Calculation Rules

Rule Attributes

*Action Code: Condition Go to Rule Details...

Condition


Rule Miscellaneous

[Rule Processing Modes](#)
[Rule Comments](#)
[Rule Copy](#)

[Rule Effective Dates](#)
[Rule Keywords](#)
[Rule Delete](#)

Rule page - Condition rule

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Status	The rule status is either <i>Active</i> or <i>Inactive</i> .
Rule Description	Create a meaningful description.
Action Code	Enter or select Condition as the action code.
Go to Rule Details	This link on the Rule page is always unavailable for the Condition rule because there are no rule details for a condition rule.
Condition	In the Condition field on the Rule page, enter a syntax statement that expresses the condition for processing the subsequent rules. It must result in a Boolean value. A blank Condition field evaluates to true.
	Click the Syntax Wizard button to access a page on which to build your syntax.

For information about the Syntax Builder, see Syntax Builder Page.

Overview of the Secondary Variable Rule

Secondary Variable rules populate variables for a single level of configuration for the values used in rules processing. For example, if you want to accumulate a running total for the price, you can define that total as a variable and use it in rule syntax.

Create a secondary variable when you want the variable to apply only to a single level of configuration. For example, to configure a bike with a component, you can use secondary variables for the component. The secondary variables are available only within the rules processing for the component.

To set up a Secondary Variable rule, complete the information on the Rule page. In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Secondary Variable rule processes. If the condition is interpreted as true, the secondary variable is created. The system interprets a blank condition as true.


Rule - Secondary Variable Page

Usage	Use the Secondary Variable page to populate temporary storage variables that are used in rules processing.
Object Name	CP_RULE_DTL_SV
Navigation	Click the Go To Rule Details link on the Syntax Builder Page.
Access Requirements	Select Secondary Variable as the Action Code when you are creating a new rule or defining parameters to access the Rule page.

For more information about the Rule page, see Rule Page.

Rule - Secondary Variable



SetID: SHARE **Functional Area:** Distribution **Rule:** BKKT-80

Variable: 

Type: Number

Length: 6

Decimals: 2

Value (Syntax):
  

Rule - Secondary Variable page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Variable	Identifies this secondary variable. You can select the Variable name from the drop-down list of valid values, or you can add or update a secondary variable using the Add/Update button.
Type, Length, and Decimal	The type and length of the variable are displayed, along with the number of decimal positions for a numeric variable.
Value	This syntax field of a Secondary Variable rule uses a syntax expression to define the value of the variable you just named. For example, a syntax expression can use prices of several components to calculate the subtotal.
OK	Click to save edits return to the Rule page.
Cancel	Click to cancel edits return to the Rule page.

Overview of the Global Variable Rule

Global variables apply to all component levels within a configuration. Using global variables enables you to share variable information between a parent item and its configured components or between a child node and other child nodes that follow in rules processing. Global variables in a Distribution configuration are also passed to the Production configuration.

For more information about Global Variables, see Using the Rule Page.



To set up a Global Variable rule, complete the information on the Rule page. In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Global Variable rule processes. If the condition is interpreted as true, the global variable is created. A blank condition is interpreted as true.

Rule - Global Variable Page

Usage	Use the Global Variable page to populate variables that apply to all component levels with a configuration.
Object Name	CP_RULE_DTL_GV
Navigation	Click the Go To Rule Details link on the Establishing Global Variables.
Access Requirements	Select Global Variable as the Action Code when you are creating a new rule or defining parameters to access the Rule page.

Rule - Global Variable




SetID: SHARE **Functional Area:** Distribution **Rule:** BCST-40

Variable:  

Type: Number

Length: 6

Decimals: 2

Value (Syntax):   

Rule - Global Variable page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Variable

Variable is the non-syntax character string that identifies this global variable. You can select the **Variable** name from the drop-down list of valid values, or you can add or update a variable using the **Add/Update** button.

Type, Length, and Decimal

The type and length of the variable are displayed, along with the number of decimal positions for a numeric variable.

Value

Specify the new value of the global variable. You can enter a literal value in quotation marks, or you can define the new value with a syntax expression.

OK

Click to save edits return to the Rule page.

Cancel

Click to cancel edits return to the Rule page.

Overview of the Option Variable Rule

Under some conditions, you may want to automatically change the value of an option entered during sales order entry. An Option Variable rule substitutes a new value for an option variable. The system uses the new value in rules processing exactly as it would have used the one originally entered on an order page. You can use an Option Variable rule to set a dynamic default for option values before the users encounter the page that allows them to enter their choice.

In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Option Variable rule processes. If the condition is interpreted as true, the system changes the option values as specified. A blank condition field is interpreted as true.



Click the Rule Details link to access the details page for the Option Variable rule.

Rule - Option Variable Page

Usage	Use the Option Variable page to create a new value for an existing option variable or to populate a new option variable.
Object Name	CP_RULE_DTL_OV
Navigation	Click the Go To Rule Details link on the Rule Page.
Access Requirements	Select Option Variable as the Action Code when you are creating a new rule or defining parameters to access the Rule page.

Rule - Option Variable



SetID: SHARE **Functional Area:** Distribution **Rule:** PZ-6050

Variable:  

Type: Character

Length: 5

Decimals: 0

Value (Syntax):  

Rule - Option Variable page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Variable	Select the Variable name from the drop-down list, or add or update a variable using the Add/Update button.
Type, Length, and Decimal	The type and length of the variable are displayed, along with the number of decimal positions for a numeric variable.
Value (Syntax)	Specify the new value of the option variable. You can enter a literal value in quotation marks, or you can define the new value with a syntax expression.
OK	Click to save edits return to the Rule page.
Cancel	Click to cancel edits return to the Rule page.

Overview of the Internal Variable Override Rule

An Internal Variable Override rule retrieves data for configuration processing by allowing you to override specific information on an internal variable query. Unlike internal variables, the internal variable override rule allows you to change the key values on the Internal Query that is associated with an internal variable. Internal Variable Override rules use the Internal Query Table, but enable you to override the business unit and item or product ID to use as keys.

Values retrieved by the Internal Variable Override rule are stored for processing as secondary variables. Like all secondary variables, these values apply only to the rules for a single configured item.

To set up an Internal Variable Override rule, complete the information on the Rule Page.


In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Internal Variable Override rule processes. If the condition is interpreted as true, the internal variable is created. A blank condition field is interpreted as true.

Rule - Internal Variable Override Page

Usage	Use the Internal Variable Override page to point to different product or item keys than those associated with original Internal Query values.
Object Name	CP_RULE_DTL_IV
Navigation	Click the Go To Rule Details link on the Rule page.
Access Requirements	Select Internal Variable Override as the Action Code when you are creating a new rule or defining parameters to access the Rule page.

Rule - Internal Variable Override


SetID: SHARE **Functional Area:** Distribution **Rule:** CASE-02


Variable 



Type: Number

Length: 5

Decimals: 2

Internal Variable 

Business Unit:  US001 NEW YORK OPERATIONS

Product ID/Item ID (Syntax):
  

Rule - Internal Variable Override page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Variable	Enter or select a secondary Variable name to store the resultant value. Then, to use the Internal Variable Override that you've just defined in subsequent rules, use this new secondary variable in rules syntax.
Type, Length, and Decimal	The type and length of the variable are displayed, along with the number of decimal positions for a numeric variable.
Internal Variable	To enable the Sales Product Configurator to find the data that you want, select an Internal Variable .
Business Unit	Specify the Business Unit that you want to use to override any BUSINESS_UNIT field on the associated Internal Query.
Product ID/Item ID (Syntax)	In Product ID/Item ID (Syntax) , enter a syntax expression to specify the Product or Item ID to use to override any PRODUCT_ID or INV_ITEM_ID field on the associated Internal Query. Alternatively, you can enter a single ID in quotation marks.
OK	Click to save edits return to the Rule page.
Cancel	Click to cancel edits return to the Rule page.

Overview of the Configuration Detail Rule

The advantages of make-to-order manufacturing depend partly on both you and your customer being able to see what has gone into the final order. By incorporating Configuration Detail

rules into either a Distribution or Production rule tree, you can save the results to a table. The table documents additional configuration information for printing reports. Each rule produces one line of detail information.

To set up a Configuration Detail rule, complete the information on the Rule page.

In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Configuration Detail rule processes. If the condition is interpreted as true, the detail line is created. A blank condition field is interpreted as true.

Rule - Configuration Detail Page

Usage	Use the Configuration Detail page to specify the printing sequence for configuration details on documents or reports.
Object Name	CP_RULE_DTL_CD
Navigation	Click the Go To Rule Details link on the Rule Page.
Access Requirements	Select Configuration Detail as the Action Code when you are creating a new rule or defining parameters to access the Rule page.

Rule - Configuration Detail

SetID: SHARE Functional Area: Distribution Rule: BCD-30

Sequence:

☒ Use Literal for Description
☐ Use Option for Description

Description:

Print Code: All Reports

Config Detail Value (Syntax):

Rule - Configuration Detail page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Sequence

All option details are printed to the Configuration Detail table before other kinds of detail lines. The **Sequence** field for each Configuration Detail rule determines the order in which configuration details are printed. You can specify the printing sequence as precisely as you like.

Use Literal for Description

Select this option if you want to create a literal description on your configuration detail instead of using an option variable description and value.

Use Option for Description	Specify whether the detail you want to print to the table points to an option variable value by selecting Use Option for Description . Select this option if you want to create configuration detail with an option variable description and value.
Description	This field displays when you select Use Literal for Description . Enter the description that you want to print along with the detail value.
Variable	This field displays when you select Use Option for Description . Enter the name of the option variable or select the name of the option from the drop-down list. Option details will print both the option name and the option value when you generate a configuration detail.
Print Code	Select from the drop-down list of valid values to determine the documents that the configuration details will be printed on, according to the flags on the Print Code Table. Click the Add/Update button to add a new print code value or update the existing print code.
<hr/> For more information about print codes, see Rule Page. <hr/>	
Config Detail Value (configuration detail value)	Enter a syntax expression to calculate the value. This field will print the configuration detail information that is specified in the syntax.
OK	Click to save edits return to the Rule page.
Cancel	Click to cancel edits return to the Rule page.

Overview of the Create External Parameter Rule

By writing external programs to perform particular functions, you can add individualized features to your PeopleSoft CRM Sales Product Configurator, as well as save time on rules maintenance. PeopleSoft enables you to pass configuration information out to these external programs during rules processing through Create External Parameter rules. Each of these rules sends one parameter to the external program.

Your Create External Parameter rule must process before invoking an External Program Variable, which calls the external program and calculates a result.

For more information about external programs, see Rule Page.

In the Condition field on the Understanding Print Codes, you can enter a syntax expression to specify the conditions under which the Create External Parameter rule processes. If the

condition is interpreted as true, the parameter is created. When you leave the condition field blank, it is interpreted as true.

Rule - Create External Parameter Page

Usage	Use the Create External Parameter page to create parameters to pass to external applications during configuration rules processing.
Object Name	CP_RULE_DTL_CP
Navigation	Click the Go To Rule Details link on the Syntax Builder Page.
Access Requirements	Select Create Parameter as the Action Code when you are creating a new rule or defining parameters to access the Rule page.

Rule - Create External Parameter

SetID: SHARE **Functional Area:** Distribution **Rule:** BK-02

Field Type:

Value of Parameter (Syntax):

Rule - Create External Parameter page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Field Type

Specify the **Field Type** for the parameter value (*Character* or *Numeric*).

Value of Parameter (Syntax)

In the **Value of Parameter (Syntax)** field, enter a syntax expression to calculate the parameter.

OK

Click to save edits return to the Rule page.

Cancel

Click to cancel edits return to the Rule page.

CHAPTER 6

Establishing Distribution Rules

Distribution configuration takes place in the rules that define your sales order entry. You can use these rules that process while you're online to specify which options are available for each product, what the product costs are to the customer and to you, and when the product can be shipped—information that both you and your customers need.

This chapter about establishing sales order entry rules, along with the other chapters about setting up rules (Establishing Common Rules and Establishing Production Rules), are organized by functional area (production or distribution). Here we discuss the rules that apply only to distribution. To set up a distribution rule tree, you need the rule types that are discussed here and in Establishing Common Rules. To define rules for the PeopleSoft CRM Sales Product Configurator, start with the Rule page.

In the Condition field on the Rule page, enter a syntax expression to specify the conditions under which the specific rule processes. A blank condition field is interpreted as true. Most rule detail pages include fields that can use syntax.

For more information about completing the Rule page, see Using the Rule Page. **For information** about the Syntax Builder, see Syntax Builder Page.

Note. To use a different language, set up a language-specific user logon for the person who uses the new language. A user in France might have a logon of FR1 set to use the French language, and another user in Brazil might have a logon of BR1 set to use Brazilian Portuguese. When these users log on, fields appear in the specified language, and related language tables can be used for Page Generation rules and value lists.

Overview of the Page Generation Rule

To take full advantage of configured product ordering, you can configure Order Entry - Configure pages for each product and limit the information that appears. You can also specify the way that options are grouped for each option page that the user sees. Do this by inserting Page Generation rules into your distribution rule tree. Sales order entry is efficient because you get exactly the information you need on each page and each order is validated.

The Rule page displays two additional group boxes for the Page Generation rule: Page Options and Page Layout.

Rule		
SetID: SHARE	Functional Area: Distribution	*Status: Active
Rule: BKCS-05	*Rule Description: Bike Transport Case Main Panel	
Rule Attributes		
*Action Code: Page Generation	Go to Rule Details...	
Condition		
Rule Miscellaneous		
Rule Processing Modes	Rule Comments	Rule Copy
Rule Effective Dates	Rule Keywords	Rule Delete
Page Options		
*Page Processing: Deferred Mode	*Layout Options: Standard	Test Page
Page Layout		

Selecting the processing mode and layout options for the Page Generation rule

Page Options

Page Processing

Select the page processing mode from the drop-down list. Available options are:

Deferred Mode: Causes a page to be validated only when the *Continue* action is selected during order entry. This is the default mode.

On Display Mode: Causes the page to be validated on the initial display of the page and when the Continue action is selected during order entry. Additionally, you can click the Refresh button during order entry to update price or option validation.

Real-Time Mode: Causes the page to be validated on the initial display of the page, when the Continue action is selected during order entry, or when an option value is changed during order entry.

Layout Options

Select one of the following:

Standard: Select if you want to use one of the three standard page layout templates that appear in the Page Layout group box.

Custom: Select if you want to create your own page layout. This option is available only when **Page Processing** is in *Deferred Mode*. Click the **Custom Layout HTML** arrow to display the HTML template edit box.

Test Page

Click to navigate to the Rule - Test Page to view a working model of the page created with the Page Generation rule.

Page Layout

This group box appears only when you select the *Standard* option in the **Layout Options** group box. Select one of the standard layout templates provided.

Selecting a Page Layout Style for the Page Generation Rule

With PeopleSoft CRM Sales Product Configurator, you can select one of the three standard page layouts provided, or create your own page layouts to fit individual customer business needs. If you elect to create your own page layouts, the system generates an HTML template that you can modify to meet your business requirements. The HTML that the system generates contains all of the option information and attributes that you've entered for the Page Generation details.

Standard Layout Style

If you select the value *Standard Layout* in the Layout field on the Rule - Page Generation Page, the system displays the three standard layout options. Select the option that best fits your business requirements. For example, you might use the standard layout Style 3 to display lengthy scripted questions.

Note. Expand the Standard Layout Options group box bar to display the standard layout option templates. The Standard Layout Options are available with all three processing modes.

Select one of the following standard layout styles:

Style 1	A basic layout with a short page, single column style.
Style 2	A short page, double-column style layout.
Style 3	A long page, single-column style layout. Use this layout style when you require lengthy labels.

Additional standard layout flexibility enables you to configure your page layout for specific customer business needs without creating your own page layout. The following fields on the

Rule - Page Generation Page accept HTML tags, enabling modifications to each of the standard layout styles:

- Page Title
- Option Label
- Option Information

Custom Layout Style

Select the *Custom Layout* option in the Layout field on the Rule - Page Generation Page to create a page layout of each configuration page that fits an individual customer's business needs. When you select the *Custom Layout* option, the system displays a Custom Page Layout group bar that you can expand to display the text edit box containing an HTML template.

Important! The *Custom Layout* option is available only when page processing is in deferred mode.

To create a <i>Custom</i> page layout:

1. Create a Page Generation rule in Sales Product Configurator.

Define all of the options and the associated option information just as you would if you were creating a standard layout page.
2. Save the page after you have established the page definition.
3. Select the *Custom Layout* option in the Layout Option field on the Page Generation Rule Page.

The system generates and displays a Custom Layout HTML template based upon the Standard Layout option defined.

Note. You must first save the page before selecting the *Custom Layout* option. This option uses what is stored in the database to generate the HTML. If changes were made and the *Custom Layout* option is selected without first saving the page, the HTML will be inaccurate. The HTML will not contain the changed information. After you select the *Custom Layout* option, all fields on the Rule - Page Generation Page are unavailable for entry. Changing an option or attribute after generating the HTML template would corrupt the accuracy of the option and attribute information contained within the template.

4. Using an HTML or text editor, cut and paste the Custom Layout HTML template into the body of an HTML document.

The following is an example of an acceptable HTML structure:

```
<html>  
<head>
```



```

<title>Page Generation Rule Custom Layout Template</title>
</head>

<body>

<!-- Start of Cut & Paste HTML -->

<!-- Insert HTML from Product Configurator's Page Generation Rule Here -->

<!-- End of Cut & Paste HTML -->

</body>
</html>

```

5. Modify the HTML to fit your business needs.

Adhere to the following guidelines when modifying the HTML:

- **SELECT** and **INPUT** tags cannot be deleted.

Additionally, the **NAME** property on **SELECT** and **INPUT** tags cannot be modified and must match the option variable names defined on the Page Generation Rule.

- The **VALUE** property on **OPTION** tags cannot be modified and must match the value list definition for the corresponding option variable on the Page Generation Rule.
- The system captures as option variables only those options that you define on the Page Generation Rule.

The system does not capture any additional options with **SELECT** or **INPUT** tags unless you add these option variables to the Page Generation Rule and regenerate the HTML.

6. Cut and paste your modified HTML back into the Custom Layout HTML text box on the Page Generation Rule in the Product Configurator.

7. When finished, click the OK button to return to the Rule Page.

Rule - Page Generation Page

Usage	Use the Rule - Page Generation page to associate user input for each page with option variables to use in rules processing. You can set up the option value lists and constraints for validation, specify defaults, and determine how the options will appear on the order entry page.
Object Name	CP_RULE_DTL_PG
Navigation	Click the Go To Rule Details link on the Rule Page.

Access Requirements	Select Page Generation as the Action code when defining a new rule or when specifying parameters to access the Rule page.
---------------------	---

Rule - Page Generation

SetID: SHARE Functional Area: Distribution Rule: BKCS-05

Page Title: Bike Transport Case

Page Attributes Find | View All First 1-4 of 4 Last

Option Information Option Attributes **Page Attributes** Prompt Default Product List

Variable	Seq	Variable Description			
CASE_SIZE	1	Case Size			
CASE_TYPE	5	Case Type			
CASE_WHEELS	10	Include Wheels?			
CASE_STRAP	15	Include Strap?			

Real-Time Pricing

Price (Syntax):

OK Cancel

Rule - Page Generation: Option Information page

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Page Title

The title that is appears at the top of the data entry page.

As an option, HTML tags are supported on this field.

Variable

The name of the option variable for the corresponding row of the page.



When you are adding a variable, click the **Search** button to select an existing value for the associated field.



Click the **Add/Update** button to add a new field of the associated type or to update an existing value.

Seq (sequence)

Each row on the Page Generation page defines one field for user input. You determine the order that the options appear on the page by entering a **Seq** number for each option.



Click the **Option Description** button to access the Page Generation - More Option Information page, where you can add additional information about the corresponding option. When you populate the option description, the page label appears as a link on the Order Entry page. You can click the link on the Order Entry page to display additional option information.



Click the **Add** button to add a new row.



Click the **Delete** button to delete the existing row.

Price (Syntax)

This syntax field is displayed only when the page processing mode is set to **Real-Time Mode** or **On Display Mode**. In **Real-Time Mode**, the price is recalculated when you change an option value during order entry. In **On Display Mode**, the price is recalculated when you click the **Refresh** button. The system stores the **Real Time Pricing** value in the *DYNAMIC_PRICE* constant.

Ensure that you define default values for all of your options if you intend to use the real-time dynamic pricing feature.

For more information about constants, see Understanding Constraints .

OK

Click to save edits and return to the Rule Page from any of the tabs in this group of pages.

Cancel

Click to cancel edits and return to the Rule Page from any of the tabs in this group of pages.

Option Information Tab

See the above exhibit for a view of this page.

Page Label

Determines the label that the user sees for this option variable on the page.

As an option, HTML tags are supported on this field.

Option Attributes Tab

Rule - Page Generation

SetID: SHARE Functional Area: Distribution Rule: BKCS-05

Page Title: Bike Transport Case

Page Attributes Find | View All First 1-4 of 4 Last

Variable	Seq	Type	Length	Decimals	Allow Fractions
CASE_SIZE	1	Character	10	0	<input type="checkbox"/>
CASE_TYPE	5	Character	4	0	<input type="checkbox"/>
CASE_WHEELS	10	Character	1	0	<input type="checkbox"/>
CASE_STRAP	15	Character	1	0	<input type="checkbox"/>

Real-Time Pricing

Price (Syntax):

OK Cancel

Rule - Page Generation: Option Attributes page

Type

Specifies whether this option value is a character or a number. This field is a related display field from the option variable definition.

Length

Specifies the number of characters that this option variable permits during order entry (excluding decimal positions). This field is a related display field from the option variable definition.

Decimals

Specifies the number of decimals that this option variable permits during order entry. This field is a related display field from the option variable definition.

Allow Fractions

If the option variable is numeric and the control type is an edit box, select this check box to enable the entry of fractions during order entry, for example, $1 \frac{1}{2}$, $\frac{4}{5}$, $2 \frac{1}{4}$.

Page Attributes Tab

Rule - Page Generation

SetID: SHARE Functional Area: Distribution Rule: BKC8-05

Page Title: Bike Transport Case

Page Attributes Find | View All First 1-4 of 4 Last

Variable	Seq	Control Type	Required	Gray	Print Code
CASE_SIZE	1	Dropdown List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ALL
CASE_TYPE	5	Dropdown List	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ALL
CASE_WHEELS	10	Check Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ALL
CASE_STRAP	15	Check Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ALL

Real-Time Pricing

Price (Syntax):

OK Cancel

Rule - Page Generation page: Page Attributes page

Control Type

Select the **Control Type**. Options are as follows:

Check Box: Displays the option for this variable as a check box on the page. Only options that have a length of 1 and a type of *Character* are valid with the use of the check box.

Dropdown List: Displays the options for this variable as a drop-down list box on the page. You must associate a value list for all options that have a control type of **Dropdown List**.

Edit Box: Displays the option for this variable as an edit box on the page.

Radio Button: Displays the options for this variable as a set of radio buttons on the page. You must associate a value list for all options that have a control type of **Radio Button**.

Required

Select if the option for a variable, with a control type of **Edit Box**, is a required field during option entry.

Check box, drop-down list, and radio button control types are automatically defined as **Required**.

Gray

Select **Gray** if the option for this variable should be unavailable during option entry.

Print Code

Designates which report(s) will include the option information. Adding a print code as an option on the Page Generation rule creates a configuration detail for that option to be printed on the report that is associated with the print code that is selected.

For more information about print codes, see Understanding Print Codes.

Prompt Tab

Rule - Page Generation

SetID: SHARE Functional Area: Distribution Rule: BKCS-05

Page Title: Bike Transport Case

Page Attributes Find | View All First 1-4 of 4 Last

Option Information	Option Attributes	Page Attributes	Prompt	Default	Product List
Variable	Seq	Value List	Hide Value Codes	Constraint	
CASE_SIZE	1	CASE_SIZE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/>
CASE_TYPE	5	CASE_TYPE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/>
CASE_WHEELS	10		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/>
CASE_STRAP	15		<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/>

Real-Time Pricing

Price (Syntax):

OK Cancel

Rule - Page Generation: Prompt page

Value List

Associating the option selection field with a value list enables you to validate options as they are entered. If the value that the user enters does not exist on the value list table, the page displays an error message until a valid value is substituted. Click the **Add/Update** button to add or update a value list field.

For more information about value lists, see Establishing Value List Variables.

Hide Value Codes

Select the **Hide Value Codes** check box for each value list for which you want to “hide” the value code. Then, when you are making your configuration selections for a product, the drop-down lists and radio buttons will display only the long description of each value on the value lists.

When the **Hide Value Codes** check box is cleared, the drop-down lists and radio buttons will display both the value code and the long description of each value on the value lists. This is the default.



Click the **Prompt Information** button to access the Page Generation - Dynamic Value List Page.

Constraint

Determines whether a constraint is used on the value list for this option. Associating constraints with value lists on an option allows for complex cross-validation between option values. Click the **Add/Update** button to add or update a constraint field.

For more information about constraints, see [Understanding Constraints](#).

Note. The system issues an error warning and prevents you from saving the page if you define for a variable a product list query in combination with a value list, dynamic value list, or constraint.

Default Tab

Rule - Page Generation

SetID: SHARE Functional Area: Distribution Rule: BKCS-05

Page Title: Bike Transport Case

Page Attributes Find | View All First 1-4 of 4 Last

Variable	Seq	Default Value (Syntax)	
CASE_SIZE	1	"LARGE"	+ -
CASE_TYPE	5	"HARD"	+ -
CASE_WHEELS	10	"Y"	+ -
CASE_STRAP	15	"Y"	+ -

Real-Time Pricing

Price (Syntax):

OK Cancel

Rule - Page Generation: Default page

Default Value (Syntax)

Determines the default value for this field. If no syntax or value is entered, or if the syntax is not valid, then the default for a radio button or drop-down list will be the last value in the value list. For a check box, the default is *cleared*. This is a syntax field.



Click the **Syntax Wizard** button to access the Syntax Builder Page.

Product List Tab

PeopleSoft CRM Sales Product Configurator enables you create a filtered list of Product ID values for use as a prompt within the configuration engine instead of creating and using a value list. You can capture for an option value a Product ID (with a character value of 18) from the list of products based on criteria you define on an Internal Query and build over the PROD_ITEM record.

Rule - Page Generation

SetID: SHARE Functional Area: Distribution Rule: BKCS-05

Page Title: Bike Transport Case

Page Attributes Find | View All First 1-4 of 4 Last

Variable	Seq	Product List	Description
CASE_SIZE	1		
CASE_TYPE	5		
CASE_WHEELS	10		
CASE_STRAP	15		

Real-Time Pricing

Price (Syntax):

OK Cancel

Rule - Page Generation: Product List page

Product List displays the internal query you have previously defined on the Internal Query page for the corresponding variable.

Note. The system issues an error warning and prevents you from saving the page if you define for a variable a product list query in combination with a value list, dynamic value list, or constraint. Additionally, you cannot define default values for variables that have product lists.

Click the **Lookup Product List** button to select an internal query you previously defined on the Internal Query page. To create a new query, click the **Add/Update** button to navigate to the Internal Query page, where you can specify the criteria for the new internal query. PROD_ITEM is the only table you can query for a product list. When you navigate to the

Internal Query page, the Table field displays the value *PROD_ITEM*, and is unavailable for entry.

Note. When you select from a product list for an option variable, that option variable must be of type *Character* with a length of 18. The control type must be either a *Dropdown List* or *Radio Button*.

Description displays the description of the internal query that generates the product list.

The Page Generation - More Option Information Page

Usage	Use the Page Generation - More Option Information page to include additional information for options. When your customer clicks an option, a secondary window appears containing the information you define on this page.
Object Name	CP_RULE_INFO_SEC
Navigation	Click the Option Description button on the Rule - Page Generation page.

Page Generation - More Option Information

Variable: CASE_SIZE Sequence: 1 Page Label: Case Size

Enter Additional Information:

OK Cancel

The Page Generation - More Option Information page

Variable The option variable for which you are adding additional information.

Sequence Each row on the Page Generation page defines one field for user input. You determine the order that the options appear on the page by entering a sequence number for each option.

Page Label	Determines the label that the user sees for this option variable on the page. You define the page label on the Rule - Page Generation page.
Enter Additional Information	Use this text box to enter additional information about the option variable. For example, you can add detailed product specifications for an option. Additionally, you can include HTML in this field for graphics or other media-rich content.
OK	Click to save edits to this page and return to the Rule - Page Generation Page.
Cancel	Click to cancel edits to this page and return to the Rule - Page Generation Page.

Page Generation - Dynamic Value List Page

Usage	Use the Page Generation - Dynamic Value List page to create the syntax in the Dynamic Value List field. Using syntax, this field dynamically determines which value list is editable for this option. If the syntax does not evaluate to a valid value list, then the value list defined in the Value List field is used. If the Value List field is blank, and the syntax does not evaluate to a valid value list, then an error results.
Object Name	CP_USER_CD_SX_SEC
Navigation	Click the Prompt Information button on the Rule - Page Generation: Prompt page.

Page Generation - Dynamic Value List (Syntax)

Variable: BK_SHIRT_TYPE Sequence: 1 Value List: BKSHIRTS

Dynamic Value List (Syntax)

Page Generation - Dynamic Value List (Syntax) page

Variable	Displays the name of the variable on the Rule - Page Generation page.
Sequence	Displays the sequence line of the selected variable.
Value List	Displays the value list that is associated with the selected variable.
Dynamic Value List (Syntax)	Use syntax to determine the value list that is editable for this field.

Click **OK** to return to the Prompt tab of the Page Generation rule detail page.

Rule - Test Page

Usage	Use the Rule - Test page to view a working model of the page created with the Page Generation rule.
Object Name	CP_DYNAMIC_PANEL
Navigation	Click the Test Page link on the Rule Page.
Access Requirements	Select Page Generation as the Action Code when defining a new rule or when specifying parameters to access the Rule - Test page.

Rule - Test Page

Custom Bike Accessory Kit

Bike Shirt Type TSHRTLSMEN - LS T-Shirt - Men (\$15.99)

Bike Glove Type USX - Gloves - Unisex (\$15.49)

Bike Pump Type

☐ FLOOR - Floor Pump (\$54.99)

☒ FRAME - Frame Pump (\$22.99)

☐ XXX - None

Bike Cycle Computer ☐

Free Tire Patch Kit ☒

Continue **Cancel**

Rule - Test page

Click **Continue** or **Cancel** to return to the Rule page.

Overview of the Page Validation Rule

If the combination of options selected on an order entry page is not valid, the system must stop the order entry configuration and prompt the user to correct any mistakes. Page Validation rules enable you to check for invalid conditions and, if necessary, display an appropriate error, warning, or informational message on the order entry page. The validation process alerts you only when something is wrong.

To make sure that the correct page appears for correction when an error does occur, a Page Validation rule must be a child of a Page Generation rule in your rule tree. A Page Validation rule cannot be on the same node of the tree as the Page Generation rule for the page that it checks, even if it is the next rule in normal processing.

To set up a Page Validation rule, complete the information on the Rule page. On the Rule page, enter a syntax expression that tests for a condition. If you leave the condition field blank, it is interpreted as true.

Rule - Page Validation Page

Usage	Use the Page Validation page to detect a condition that should yield an error, a warning, or an informational message. You can enter the text of the message on the rule detail page.
Object Name	CP_RULE_DTL_PV
Navigation	Click the Go To Rule Details button on the Rule Page.
Prerequisites	If necessary, value lists and constraints must be set up before you use a Page Validation rule.
Access Requirements	Select Page Validation as the Action Code when creating a new rule or when specifying parameters to access the Rule page.

Rule - Page Validation

SetID: SHARE **Functional Area:** Distribution **Rule:** WHPG-4A

Message:

***700X20 ARE VERY THIN TIRES AND REQUIRE EXTRA SMALL TUBES"

Message Type: Warning

OK Cancel

Rule - Page Validation page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Message

The message that appears when the system confirms that the option or combination of options is invalid. The Page Validation rule also includes the option of creating a message that displays informational or promotional text during the configuration phase of the ordering process. For example, you can use a message to encourage a user to upgrade to another model or to notify the user that a special promotion is in effect.

Message Type

Valid values are as follows:

Error: An error message appears if an error occurs during the configuration. A Page Validation rule of the type **Error** returns you to its corresponding Page Generation rule so that you can correct the condition before configuration continues.

Message: Continues the configuration process after the system displays the message.

Warning: When a warning message is displayed, click **OK** to continue the configuration, or click **Cancel** to return to the previous Page Generation rule.

Note. To use a different language, set up a language-specific user logon for the person who will use the new language. A user in France might have a logon of FR1 set to use the French language, and another user in Brazil might have a logon of BR1 set to use Brazilian Portuguese. When these users log on, fields appear in the specified language, and related language tables can be used for Page Generation rules and value lists.

Click **OK** to return to the Rule page.

For more information about value lists, see Establishing Value List Variables. **For more information** about constraints, see Understanding Constraints .

Overview of the Configured Component Rule

Configured component rules initiate the PeopleSoft CRM Sales Product Configurator multilevel processing (rule tree). Each configured component within a configured product uses its own rule tree.

In the condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Configured Component rule processes. A blank condition field is interpreted as true.

Rule - Configured Component Page

Usage	Use the Configured Component page to set up your configured components—the product or item, the production area, and so forth.
Object Name	CP_RULE_DTL_CC
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Configured Component as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Configured Component

SetID: SHARE **Functional Area:** Distribution **Rule:** BWCC-10

Occurs:

Item/Product Flag:

Product ID/Item ID (Syntax):

Business Unit: COLORADO BIKE MFG/OUTDOOR

Production Area (Syntax):

Rule - Configured Component page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Occurs

To ensure that the system correctly identifies this configured component, enter a unique **Occurs** (component occurrence) number. The **Occurs** field is important only when you are configuring an item that has more than one occurrence of the same component with the same parent—for example, a bicycle with two separately configured wheels.

Item/Product Flag

If the component is an item, enter *Item* in the **Item/Product Flag** field. To identify a component by product ID, enter *Product* in this field.

Product ID/Item ID (Syntax)

Enter a syntax expression to return the product or item ID in the **Product/Item ID (Syntax)** field. If the product or item number is always the same, enter the product or item ID itself in quotation marks.

Business Unit

Enter the Manufacturing business unit that produces the component item.

Production Area (Syntax)

The production area where the component will be manufactured. Each item is associated with a specific production area when you define the inventory entry for the item. After an item is defined, be sure that the production area is set up and that you have associated the item with the production area.

When a configured order is released to production, the system generates component and operations lists specifying the production area. Enter a syntax expression to retrieve the production area ID, or enter the appropriate area within quotation marks.

Click **OK** to return to the Rule page.

Overview of the Purchase Item Rule

If you need to purchase components that are used in configured items, use the Purchase Item rule to generate purchase requisitions for both configured and non-configured components. This enables you to produce some items and purchase others. The components might be either raw materials or sub-assemblies that are used as components in the end item.

A single configured item on a sales order line can generate multiple components, configured or not configured, that can be purchased. The PeopleSoft CRM Sales Product Configurator generates the requisitions to cover component requirements so that all of the components used in producing the configured item are associated with the sales order.

For example, a bicycle manufacturer might use this rule if the manufacturer makes the frame and assembles the bicycle but doesn't produce the other components that make up the bicycle. The manufacturer would use the Purchase Item rule to create a configured purchase requisition for the correct sizes and materials of the wheels and other parts for assembling the bicycle.

If the system finds a Purchase Item rule after a Configured Component rule, the configured item is purchased, rather than produced.

To set up a Purchase Item rule, complete the information on the Rule page. In the condition field on the Rule page, enter a syntax expression to specify the conditions under which the Purchase Item rule processes. A blank condition field is interpreted as true.


Note. If you are using the Purchase Item rule and PeopleSoft Purchasing is not installed, the rule is processed, but warnings are issued in the trace file.


Rule - Purchase Item Page



Usage	Use the Rule - Purchase Item page to create a purchase requisition for components that you will purchase (instead of producing them) for the configured item.
Object Name	CP_RULE_DTL_PI
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Purchase Item as the Action Code when creating a new rule or when defining parameters to access the Rule page.


Rule - Purchase Item

SetID: SHARE **Functional Area:** Distribution **Rule:** BKCS-30

Item ID (Syntax):
 "BKCS-1" 

Date: 

Price:  

Quantity (Syntax):
 1 

Rule - Purchase Item page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Item ID (Syntax)

Enter a syntax expression to return the **Item ID (Syntax)**. If the item number is always the same, you can enter it in quotation marks: **"50100"**.

Date

Date is a variable or a literal. You can enter only a variable name for **Date** that has been set up in advance. If **Date** is a literal, you can enter any date in the format YYYYMMDD.

If the parent is a manufactured configured item, the **Date** value is ignored. If the purchased item is being used as a component on the production order (that is, the Component List rule references it), the **Date** is overwritten with the value that is calculated in the production configuration engine. If it is not used as a component, then the value in this field is used by the Purchase Requisition Loader to create the requisition.

Price

The PeopleSoft CRM Sales Product Configurator uses the **Price** as a recommended price if the item being ordered is a configured item. If the item being ordered is a standard item, the PeopleSoft Purchasing pricing is used in its place. If the item being ordered is configured, the price on the Purchase Item rule page is used as the purchase price because purchasing does not store configured prices.

Click the **Add/Update** button to add a new field or to update an existing value.

Quantity (Syntax)

Indicates the number of items to order. If the parent is *not* a manufactured configured item, the quantity value is used by purchasing when creating the requisition.

If the parent is a manufactured configured item, the **Quantity** value is ignored. If the purchased item is being used as a component on the production order (that is, the Component List rule references it), the quantity is overwritten with the value that is calculated in the Production Configuration engine. If it is not used as a component, then this field is used by the Purchase Requisition Loader to create the requisition.

Click **OK** to return to the Rule page.

Overview of the Finalize Price Rule

A Finalize Price rule calculates the sales price of a configured item and returns it to the order line. Without a Finalize Price rule, the system prices the configured item according to standard pricing rules for non-configured items. After the configured price is finalized, however, it overrides any other pricing method applied to the item, including contract pricing.

Finalize Price rules are valid only for the main item itself, not for configured components. You can generate price details by using Configuration Detail rules. If a Finalize Price rule is found on a component, the price to return is ignored, but the condition is checked to see whether it releases any child rules.

To set up a Finalize Price rule, complete the information on the Rule page. In the condition field on the Rule page, enter a syntax expression to specify the conditions under which the Finalize Price rule processes. A blank condition field is interpreted as true.

Rule - Finalize Price Page

Usage	Use the Rule - Finalize Price page to calculate the sales price of a configured item.
Object Name	CP_RULE_DTL_FP
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Finalize Price as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Finalize Price page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Price Setting

Select one of the following options:

Return List Price: Uses the value from the finalized price as the list price for the item being configured. All of the standard Order Management pricing logic is applied to this list price.

Return Net Unit Price: Uses the value from the finalized price as the net unit price for the item being configured. None of standard Order Management pricing logic is applied to this price, and price protection is in effect..

Value of Price (Syntax)

Enter a syntax expression to calculate the value of price that the system accepts as final. Its result must be a numeric value.

If the system encounters multiple Finalize Price rules for the main item during rules processing, the value calculated by the *last* one is returned to order entry.

Click **OK** to return to the Rule page.

Overview of the Finalize Cost Rule

Costing is more complicated for make-to-order items than for standard ones. You need to be able to keep track of the cost for the products you make based on the options that each one includes. Finalize Cost rules, which process at the end of configured quotes or sales orders, enable you to calculate the *estimated* cost of configured items.

The system uses the cost that returns during order entry to perform gross margin calculations. It is *not* applied to item costing in inventory. A configured item cost generation calculates the exact costs of the configured item based on the production orders that the system produces off-line in production configuration.

Use Finalize Cost rules only for the main item, not for the separate configured components.

To set up a Finalize Cost rule, complete the information on the Rule page. On the Rule page, enter a syntax expression to specify the conditions under which the Finalize Cost rule processes. If the condition is interpreted as true, the system computes a finalized cost for the item on the order. A blank condition field is interpreted as true.

Rule - Finalize Cost Page

Usage	Use the Finalize Cost page to calculate the estimated cost of configured items.
Object Name	CP_RULE_DTL_FIN
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Finalize Cost as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Finalize Cost

SetID: SHARE **Functional Area:** Distribution **Rule:** BCST-70

Value of Cost (Syntax):

G-COST

OK Cancel

Rule - Finalize Cost page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Value of Cost (Syntax) Enter a syntax expression to calculate the **Value of Cost** for the configured item. You can enter the cost if it is always the same. The result must be a numeric value.

Click **OK** to return to the Rule page.

Overview of the Finalize Date Rule

It's likely that your customers want to know when they can have a configured item at the time that they place an order. You can generate that information during order entry configuration by using a standard Finalize Date rule for each item. Depending on the conditions that you define, the system can return a scheduled ship date while you're still online. You can use internal variables and availability date information to calculate the date.

To set up a Finalize Date rule, complete the information on the Rule page. In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Finalize Date rule processes. If the condition is interpreted as true, the system returns a finalized date for the item on the order. A blank condition field is interpreted as true.

Rule - Finalize Date Page

Usage	Use the Finalize Date page to calculate a scheduled ship date.
Object Name	CP_RULE_DTL_FIN
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Finalize Date as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Finalize Date

SetID: SHARE **Functional Area:** Distribution **Rule:** BKDATE-10

Date in 'YMD' Format (Syntax):
 (C-CURRENT_DATE,CD,15)

OK Cancel

Rule - Finalize Date page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Date in 'YMD' Format (Syntax)

Enter a syntax expression to calculate the **Date in 'YMD' Format (Syntax)** for the configured item. The format of the date returned is YYYYMMDD. The system treats the result as a character string of length 8.

Click **OK** to return to the Rule page.

Overview of the Availability Date Rule

When you want to calculate the scheduled availability date for configured items, use the Availability Date rule to check on the availability of the components of the items for production. The Availability Date rule uses a business unit, an item, and a quantity to calculate an availability date.

Checking the availability of components can be time-consuming. Therefore, we recommend that you use this rule only with components that have a high impact on the scheduled ship date of sales orders.

To set up an Availability Date rule, complete the information on the Rule page and click the Rule Details link.



In the Condition field on the Rule page, enter a syntax expression to specify the conditions under which the Availability Date rule processes. If the condition is interpreted as true, the Availability Date rule processes. A blank condition field is interpreted as true.

Rule - Availability Date Page

Usage	Use the Rule - Availability Date page to check the availability of the components of the items for production.
Object Name	CP_RULE_DTL_AD
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Availability Date as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Availability Date


SetID: SHARE Functional Area: Distribution Rule: BKDATE-13



Variable:  






Type: Character

Length: 8

Decimals: 0

*Availability Check Type: 

Availability Check Attributes Find | View All First  1 of 1  Last

Business Unit	Item ID (Syntax)	Quantity to Check (Syntax)
<input type="text" value="US008"/> 	<input type="text" value="SR1002"/> 	<input type="text" value="I-ORDER_QUANTITY"/>   

Rule - Availability Date page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Variable

Select a variable from the list of valid values. The variable must be a secondary variable that contains the result of the availability date check. The date format is YYYYMMDD.

Click the **Add/Update** button to add a new variable or to update an existing value.

Availability Check Type

Select either **ATP Check** (Available to Promise Check) or **OP Check** (Order Promising Check).

Business Unit

Select from the value list of Inventory business units. Enter the Inventory **Business Unit** to check availability for the component item.

Item ID (Syntax)

Enter a syntax expression to return the **Item ID**. If the item number is always the same, enter it in quotation marks.

Items must have the correct promise option defined on their item definitions in order for Availability Date processing to occur.

Quantity to Check (Syntax)

The number of items or components (in the standard unit of measure) that you want to check for availability. Syntax must evaluate to a numeric value.



Click the **Add** button to add a new row.



Click the **Delete** button to delete the existing row.

Click **OK** to return to the Rule page.

For more information about setting up items, see Defining Items.

Overview of the Workflow Rule

You can use PeopleSoft Workflow rules to integrate product configuration in your business processes. You can dynamically trigger Workflow events from within PeopleSoft CRM Sales Product Configurator rules. You can specify the Workflow business process, activity, and event that you want to trigger.

To set up a Workflow rule, complete the information on the Rule page.

In the Condition field on the Rule page, enter a syntax expression to specify the conditions under which the Workflow rule processes. If the condition is interpreted as true, the Workflow rule processes. A blank condition field is interpreted as true.

Rule - Workflow Page

Usage	Use the Rule - Workflow page to set up the Workflow business process, the activity, and the event to trigger.
Object Name	CP_RULE_DTL_WF
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Work Flow as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Workflow page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Business Process Name	Enter or select the business process name to trigger the workflow. The business process is defined in the Business Process Designer.
Activity Name	Enter or select an activity name. The external application tells the Message Agent which message definition to use by specifying the activity name and message definition name. The Message Agent retrieves the message definition from the database. The activity name is defined in the Business Process Designer.
Event Name	You can also select an event name. Each event is part of an activity in Application Designer. The event name is defined in the Business Process Designer.
Workflow Note	You can enter a workflow note to pass information back to a worklist.

For more information about using workflow, see Using Workflow.

Note. The sample database includes email workflow and worklist workflow examples. See the *CP Workflow Mail* and *CP Workflow Worklist* activities for details.

Click **OK** to return to the Rule page.

Overview of the Kit Component Rule

Use the Kit Component rule to pick several items for the same order line. Modeled after the PeopleSoft Order Management product kit, the PeopleSoft CRM Sales Product Configurator

component kit dynamically selects components and quantities. You can include configured components within configured product kits.

For more information, see Using Configured Items as Components Within Configured Kits .

To set up a Kit Component rule, complete the information on the Rule page.

In the Condition field on the Rule page, enter a syntax expression to specify the conditions under which the Component Kit rule processes. If the condition is interpreted as true, the Component Kit rule processes. A blank condition field is interpreted as true.

Rule - Kit Component Page

Usage	Use the Kit Component page to identify the components to combine in a kit.
Object Name	CP_RULE_DTL_KC
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Kit Component as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Kit Component

SetID: SHARE **Functional Area:** Distribution **Rule:** BKKT-50

Component Product ID (Syntax):

Quantity (Syntax):

UOM:

Per:

☐ OK to Ship Without

Rule - Kit Component page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Component Product ID (Syntax)	Enter the product that you want to add to the kit when the rule is triggered.
Quantity (Syntax)	Enter the quantity, or dynamically enter the syntax expression using the Syntax Builder.
UOM (unit of measure)	Select the unit of measure.
Per	Identifies whether the number of units selected in the Quantity field is per <i>Assembly</i> or per <i>Order</i> . (<i>Assembly</i> is the default.)
OK to Ship Without	Select the OK to Ship Without check box if the product kit can ship without this component.

Click **OK** to return to the Rule page.

Using Configured Items as Components Within Configured Kits

You can define configured products or configured items as components within configured kits. This allows you to specify the elements of the configured kits and, where needed, add configuration details for specific elements. Configured kits are created dynamically based on the option selections made through the PeopleSoft CRM Sales Product Configurator.

A configured item that is a component within a configured kit cannot contain a configured component. In other words, only a single-level configured item is allowed as a component within a configured kit. In addition, only one production-configured component is allowed as a component within a configured kit.

You must have a Configured Component rule and a Kit Component rule for each configured item that is a component within a configured kit. The Configured Component rule processes the component's rules and options and sets up a configuration code. The Kit Component rule provides the information (quantity per, quantity code, unit of measure) that is needed to add the product as a kit component.

The Kit Component rule in the PeopleSoft CRM Sales Product Configurator accepts the use of a configured item or product.

Note. You cannot use configured kits within a configured kit.

When a Kit Component rule is encountered for a configured item during processing, the system looks for a Configured Component rule for that item and identifies the configuration code. The configured component must be on its own rule tree.

Overview of the Product Selector Rule

The Product Selector rule gives you the ability to cancel the current configuration and to return a standard product ID if the selected configuration is the same as a standard product.

For example, you might enter a series of options for a configured bicycle and save the configuration. The Product Selector rule checks to see whether the configuration is equivalent to a standard product. If it is the same as a standard product, the configuration is canceled and the standard product is ordered. This helps to avoid the proliferation of unnecessary product and configuration code combinations.

This rule also enables you to set up a generic configured product or kit (for example, a “gift advisor”) and then present a script with questions to determine a standard product that the customer might want to buy. Then, the standard product ID is used to order the product.

In the condition field on the Rule page, enter a syntax expression to specify the conditions under which the Product Selector rule processes. A blank condition field is interpreted as true.


Rule - Product Selector Page

Usage	The Product Selector rule can return a standard product ID.
Object Name	CP_RULE_DTL_PS
Navigation	Click the Go To Rule Details button on the Rule Page.
Access Requirements	Select Product Selector as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Product Selector

SetID: SHARE **Functional Area:** Distribution **Rule:** GA-20

Product ID:



Rule – Product Selector page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access this page appear.

Product ID

Enter syntax for the product ID, or dynamically enter the syntax expression using the Syntax Builder. This field is required.

Click **OK** to return to the Rule page.

CHAPTER 7

Establishing Production Rules

Production (manufacturing) rules enable you to dynamically specify the routing operations and components required for manufacturing configured items.

After you configure an order through the online Distribution configuration rules or through configured Direct Production orders, the system is ready to begin the background process of production configuration. The production configuration rules define the operations that are necessary to make the item, the components that production uses, and any other information to send to your manufacturing business units. The production configuration process also generates a production cost for those items that have costs based on configuration.

In this section we discuss production configuration rules that apply only to the Production functional area. In order to set up a Production rules tree, you need the rule types discussed here and in Establishing Common Rules. To define rules for the PeopleSoft CRM Sales Product Configurator, start with the Rule page.

For information about setting up Rule pages, see Using the Rule Page. **For information** about putting rules together for configuration, see Preparing To Create Rules. **For information** about Rule page fields that can use syntax, see Syntax Builder Page.

Using Operation Sequence Rules

You can use Operation Sequence rules to create or add to operation sequences. These rules take the place of routings for individual items. Using Production configuration, it is no longer necessary to maintain individual routings for each possible configuration of an item. You can use Operation Sequence rules to specify the necessary operations from a predefined routing. This enables you to generate configured routings for each item, no matter how much the item varies from order to order. Routing times and routing resources for the operation sequence are included in the operation details.

In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Operation Sequence rule processes. If the condition is interpreted as true, the system adds an operation sequence number to the operation list. A blank condition field is interpreted as true.

Click the Rule Details link on the Rule page to access the Rule - Operation Sequence Page and establish the details for the Operation Sequence rule.

For more information about defining product configuration attributes, see Establishing Items and Products for Configuration

The system arranges the operation sequence list in order of sequence number. If the operation sequence is not found on the corresponding routing, the process is stopped and is marked as an error.

Rule - Operation Sequence Page

Usage	Use the Rule - Operation Sequence page to specify the operations from a predefined routing.
Object Name	CP_RULE_DTL_OS
Navigation	Click the Go To Rule Details button on the Rule page.
Access Requirements	Select Operation Sequence as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Operation Sequence

SetID: SHARE Functional Area: Production Rule: BKOS-30

Operation Sequence (Syntax):

30

☐ Use Standard Operation Times
☒ Use Rule Based Operation Times

Operation Times Attributes Find | View All First ◀ 1 of 1 ▶ Last

Time/Resource Type	Operation Time/Rate	Time/Rate Unit	Include Setup
Costing Labor Setup		Minutes	<input type="checkbox"/>

OK Cancel



Rule - Operation Sequence page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access the page displays.

Operation Sequence (Syntax)

Syntax that must evaluate to a numeric value.

The syntax expression must return the appropriate **Operation Sequence** number. If you always want to perform the same operation, enter the operation sequence as a number. This operation sequence number must exist on the routing associated with the item being configured.

Use Standard Operation Times	When you select this option, the Operation Times Attributes group box fields are not available for entry, and the standard operation times are used for the routing definition.
Use Rule Based Operation Times	When you select this option, the fields in the Operation Times Attributes group box are available for entry, enabling the definition of configured operation times for this operation sequence. The standard operation times from the routing are replaced by the configured operation times that you define.
Time/Resource Type	Select a value from the drop-down list. When you use rule-based operation times, Time/Resource Type has a drop-down list of types that are delivered with the PeopleSoft CRM Sales Product Configurator application. The list includes resources such as <i>Costing Machine Fixed Run, Intransit Time, Planning Labor Run, Queue Time</i> , and more.
Operation Time/Rate	Operation Time/Rate is a syntax field that takes into account the combination of time and rate (depending on the time/rate unit selected) that it takes to complete the operation.
Time/Rate Unit	Select a value from the drop-down list (<i>days, hours, units/min</i> , and so forth).
Include Setup	This field includes setup as a time consideration. The Include Setup check box is available only for specific types.
	Click the Add button to add a Time/Resource Type row.
	Click the Delete button to delete a Time/Resource Type row.
OK	Click to save edits and return to the Rule page.
Cancel	Click to cancel edits and return to the Rule page.

Using Component List Rules

Use the Component List rule to create or add to a dynamic component list for each item that you configure. Not only does this guarantee that each component list matches the configured options of the current item, it saves you the time involved in maintaining standard Bills of Material (BOM). Component List rules generate component lines on your list of components.

To set up a Component List rule, complete the information on the Rule page.

In the Condition field, you can enter a syntax expression to specify the conditions under which the Component List rule processes. If the condition is interpreted as true, the system adds an item to the component list. A blank condition field is interpreted as true.

Rule - Component List Page

Usage	Use the Component List page to create or add to a dynamic component list for each item that you configure. You can include multiple components on a component list. Configured product kits can include configured components.
Object Name	CP_RULE_DTL_CL
Navigation	Click the Go To Rule Details button on the Rule page.
Access Requirements	Select Component List as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Component List

SetID: SHARE Functional Area: Production Rule: BKCL-30

Component Attributes					Find View All	First	1-4 of 4	Last
Op Seq	Per	Yield	Non-Owned	Component Item ID (Syntax)		Component Quantity (Syntax)		
30	Asy	100.0	<input type="checkbox"/>	"GR8000"		1		
30	Asy	100.0	<input type="checkbox"/>	"GR8002"		1		
30	Asy	100.0	<input type="checkbox"/>	"GR8004"		1		
30	Asy	100.0	<input type="checkbox"/>	"GR8007"		1		

OK Cancel

Rule - Component List page

The **SetID**, **Functional Area**, and **Rule** information that you entered to access the page is displayed.



Op Seq (operation sequence) The operation sequence determines where in the manufacturing process you need the components.

Enter the number of the **Op Seq** from your routing that requires this component. To avoid having items assigned to the default operation sequence, be sure to structure your rule tree so that you define the operation sequences that are associated with component list items.

Per The value you enter for **Per** defines whether the component quantity applies to each item or to each production run.

If you need a given quantity of the component for each item, select **Order**. Some processes require a minimum amount of a component to begin production.

If you need a given quantity of the component for each production instance, select **Assembly**.

Yield	You may already assign standard waste percentages to the components you use in production. By entering the percentage yield for each component, you can track resource use by configuration as well as by standard product.
Non-Owned	Enter Y in Non-Owned if the component is non-owned for accounting purposes. If the component is owned, enter N in Non-Owned .
Component Item ID (Syntax)	The Component Item ID field enables you to return the component ID as the result of a syntax expression. To assign a literal name, enter an identifier in quotation marks.
Component Quantity (Syntax)	Enter a syntax expression to calculate the required Component Quantity for each item or each assembly. The component quantity is expressed in the base unit of measure (UOM) for the Manufacturing Business Unit that produces the component. If you always want the same quantity per, enter the value as a number. If you use a matrix value, it must return a numeric value.
	Click the Add button to add an operation sequence row.
	Click the Delete button to delete an operation sequence row.
OK	Click to save edits and return to the Rule page.
Cancel	Click to cancel edits and return to the Rule page.

CHAPTER 8

Working With Configuration Codes

Configuration codes enable you to easily identify the options that are specified for a configured item. You use configuration codes to track and cost inventory accurately with the PeopleSoft CRM Sales Product Configurator. After you've defined the elements of the configuration code for an item, the system automatically assigns a configuration code to each product that it configures, during distribution configuration. When the configured items pass to PeopleSoft Inventory, they are put away and shipped in lots that carry the same configuration code. This means that your configured items are visible during inventory processing. In addition, because the lots are linked through the configuration code to the cost information used in the configuration, you have access to precise data for standard costing.

Overview of Configuration Codes

Configuration codes are 50-character, alphanumeric identifiers for configured items. The system generates them automatically as you configure items, using information about the customer's selections that you have defined as elements of the code. Configuration codes have three main functions:

- Store costs for configured items.
- Match configured sales orders with stock that already exists in inventory.
- Display the characteristics of a configured item.

The code itself can consist of options, abbreviations for options, and other data that is available in syntax. Most of this data—and therefore most of the characters in the code—comes from variables that are defined by choices in sales order entry. For example, a typical configuration code that puts together several option values (for example, **O-BIKE**, **O-COLOR**, and **O-TRIM**) reads as follows:

50-CM BLUE 2

Configuration codes can include the following kinds of values:

- Global variables
- Internal variables
- Literals
- Matrix variables

- Option variables
- Secondary variables
- Value List table descriptions

An example of using literal values to label the option values is to include the literal *BIKE* after the option value for the bike and the literal *TRIMCOLORS* after the numeric value taken from the selection field for the trim:

50-CM BIKE BLUE 2 TRIMCOLORS

Customer Product Tie to Product Configuration Code

To enable you to enter Configured Sales Order Lines easily, you can establish product aliases that represent commonly ordered configured products and kits. A product can have multiple product aliases.

Your customers will be able to refer to their own part numbers (or an alias) that refers to a specific product and configuration code combination. Using customer part numbers or aliases is helpful for configured products because these are more specific than standard (non-configured) products. The product alias can represent the customer's part number, or it can refer to an alias that is assigned by the company for a promotional, configured product.

When the Sales Order prompts for product ID, the Product ID drop-down list box shows either the System Product ID or the Customer Product ID (alias) and the corresponding description, based on what you selected for the Prd Src (production source) field. To use the customer alias, select *Customer Product ID* for Prd Src.

A company might offer one configured product that could be referred to as multiple products or aliases depending on the customer's country and language. For example, if you offer a product with an alias of *January Promotion*, and a customer is from France, the name could appear as *Especiale d'Janvier*.

Creating Configuration Codes Automatically

Before you can automatically generate configuration codes, you need to set up the format that the codes will use.

Template Page

Usage	Use the Template page to establish the rules for generating configuration codes for an item. Templates ensure that the configuration code is formatted consistently. In defining your configuration processes, you'll probably set up many templates. Although each item can be associated with only one template, you can apply templates to many different items.
Object Name	CP_TEMPLATE_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Template, Template
Access Requirements	To create a configuration code template, click the Add button. Enter the SetID and a unique Template Name.

Template

SetID: SHARE CORPORATE SETID

Template: BK1000_TMP

*Template Description: Custom Bike Kit Template

Template Attributes						Find View All	First	1-6 of 7	Last
*Seq	*Type	*Value		*Length	*Description				
1	Option Variable	BK_SHIRT_TYPE		10	Bike Shirt Type				
2	Literal	-		1	-				
3	Option Variable	BK_GLOVE_TYPE		3	Bike Glove Type				
4	Literal	-		1	-				
5	Option Variable	BK_PUMP_TYPE		5	Bike Pump Type				
6	Literal	-		1	-				

Template page

SetID

The **SetID** name and description.

Template

Template name.

Template Description

You can use the template description to help identify the template later.

Each row in the Template Attributes group box defines one element of the configuration code. Each element in the configuration code can occupy from 1 to 18 characters in the code. If the variable value is longer than the number of characters assigned to the code element, the template truncates the variable value to fit. When the value does not entirely fill the element position, the extra character spaces are left blank.

Sequence

Specifies the order of the configuration code elements. Ordinarily, you list your variables in order, from 1 to the highest number that you are using.

Type

The type of variable that supplies the value for the Configuration Code: ***Global, Internal, Option, Secondary, or Matrix.*** You can also choose to define a literal value by entering ***L*** in the **Type** field.

Value

Specifies the name of the variable that corresponds to the value that you want to display in the configuration code. The code can retrieve values from the rules tree only for the item that you are assigning the code to; be sure that you enter a value that rules processing has defined. You can select the value from the drop-down list box. If you specify ***Literal*** as the variable **Type**, enter a string literal value exactly as it will appear in the configuration code.

Length

The length of that sequence line designation within the configuration code.

Description

Helps you to identify each code element later.

Click the **Value List Description** button to enter a Value List.

If the variable value is an option variable and has an associated value list, you can direct the system to use the long description from its value list rather than the variable value itself on the configuration code. To do so, enter the name of the value list from which to draw the description, or select the value list from the drop-down list box. The field accepts only the names of the tables that you have already defined.

For example: the value of O-COLOR is defined as ***RED***, with ***CARDINAL RED*** as its long description on the value list in this configuration. By specifying the **Value List *COLORS*** on the configuration code template, the description of ***Cardinal Red*** appears in the configuration code instead of just ***RED***:

54-CM CARDINAL RED 2 TRIMCOLORS



Click the **Add** button to add a sequence row.



Click the **Delete** button to delete a sequence row.

Template - Use Long Description Page

Usage	Use the Use Long Description page to enter a value list for an option variable on a template, to use the long description for the option variable in the configuration code.
Object Name	CP_TEMPLATE_SEC
Navigation	Click the Value List Description button on the Template Page.

Template - Use Long Description

SetID: SHARE CORPORATE SETID

Template: BK1000_TMP

Value: BK_PUMP_TYPE

Value List:

Template - Use Long Description page

SetID	The SetID name and description.
Template	The template name.
Value	The template value.
Value List	The value list. If the description of the Value List value is longer than the number of spaces allowed in the template (18 characters maximum), the template truncates the description. For example, the color <i>Cantabrigian Crimson</i> is truncated in this entry: 60-CM BIKE CANTABRIGIAN CRIM 2 TRIMCOLORS

Click **OK** to return to the Rule page.

Associating Configuration Code Templates with Items

Because all of the items associated with templates receive configuration codes as they are configured, you probably don't need or want to perform manual maintenance on the configuration codes themselves. The only exception may be when you set up your system for the first time because you might need to add existing inventory items.

You can view the Configuration Code page to see whether you've changed templates for this item and to view the resultant changes to the configuration codes that the system generates for it.

If your options for an item change, or if you want to change the way that your configuration codes appear, you need to create a new template and assign it to the items you choose. You can change existing templates, *but only if they have not been used yet*.

Configuration Code Page

Usage	Use the Configuration Code page to view and update the configuration codes that the system has generated for any item. The page displays all of the Configuration Codes that are currently associated with the item. You can also see which Template created each Configuration Code.
Object Name	CP_CONFIG_PNL
Navigation	Define Business Rules, Process Product Configurator, Use, Config Code, Configuration Code
Access Requirements	Enter a Business Unit and Item ID.

Configuration Code

Unit: US008
Item ID: LT5010
Description: Custom Road Bicycle


[Insert Row](#)

Configuration Code(s)		Find View All	First	1-8 of 9	Last
*Template	*Configuration Code				
LT5010_TMP	ALM-56-GRN-CST-CLP-GFLX-M-SHM				
LT5010_TMP	CFB-56-RED-STD-STD-GFLX-M-SHM				
LT5010_TMP	CFB-56-WHT-STD-STD-GFLX-M-SHM				
LT5010_TMP	STL-48-RED-STD-TCS-CMFRT-SHM				
LT5010_TMP	STL-56-BLK-CST-STD-GFLX-M-SHM				
LT5010_TMP	STL-56-BLK-STD-STD-GFLX-M-SHM				
LT5010_TMP	STL-56-RED-CST-STD-DPD-M-SHM				
LT5010_TMP	STL-56-RED-STD-STD-GFLX-M-SHM				

Configuration Code page

Unit	The business unit.
Item ID	The item ID.
Description	Description of the item.
Template	Select the template that created each configuration code.
Configuration Code	The Configuration Code that is associated with the item.
	Click the Configuration Code Breakdown button to access the Configuration Code Template Breakdown page.
Insert Row	Click the Insert Row button to insert another row.

Configuration Code - Configuration Code Template Breakdown Page

Usage	Use the Configuration Code Template Breakdown page to display the template, which contains details describing each position in the 50-character configuration code. By looking at the descriptions for each value in the code, you can tell what the components of the template are.
Object Name	CP_INV1_TEMP_PNL
Navigation	 Click the Configuration Code Breakdown button on the Configuration Code Page.
Access Requirements	You must select a Template on the Configuration Code page.

Configuration Code - Configuration Code Template Breakdown			
Configuration Code Breakdown		Find View All	First 1-13 of 13 Last
Description	Value	From	To
Frame Material	ALM	1	3
-	-	4	4
Frame Size	56	5	6
-	-	7	7
Frame Color	GRN	8	10
-	-	11	11
Wheel Type	CST	12	14
-	-	15	15
Pedal Type	CLP	16	18
-	-	19	19
Seat Type	GFLX-M	20	25
-	-	26	26
Component Group	SHM	27	29

Configuration Code - Configuration Code Template Breakdown page

Description	Each row defines one element of the configuration code.
Value	The variable value for the element.
From	Each element in the configuration code can occupy from 1 to 18 characters in the code. From is the starting position for the element in the configuration code.
To	To is the ending position for the element in the configuration code.

Creating Configuration Codes Manually

Remember that after you have defined the elements of the configuration code for an item, the system *automatically* assigns a configuration code to each product that it configures. There are very few times that you will need to create configuration codes manually.

When you install your PeopleSoft CRM Sales Product Configurator, you might want to link some of the items that have already been ordered or manufactured to the PeopleSoft applications that use configuration codes. For these items, you can write and assign configuration codes manually by completing the distribution options on the Item Definition pages.

Using Lot Control Information

Use the Lot Control Information page to create a lot for a configuration-coded item.

To be able to track configured items in inventory, you must assign those items to lots. When the system automatically generates configuration codes as part of product configuration, the configured items go to PeopleSoft Inventory in lots also identified by configuration code. Only when you create configuration codes manually, must you also manually assign the item to a configuration-coded lot.

Note. Remember that after you have defined the elements of the configuration code for an item, the system *automatically* assigns a configuration code to each product that it configures. You usually do not need to create configuration codes manually.

The configuration code for the item appears at the bottom of the page for a configured item. The Config Code field appears only on Lot Control pages for configurable items.

If you don't see the Config Code field for a configured item, go back to the Configuration Attributes page in the Item Definition component, and make sure that the item is set to Distribution Configured.

CHAPTER 9

Tracing Product Configuration

After you create your rule trees, you can use tracing to test the processing of your rules. You can use the Start Trace and End Trace rules to trace both distribution and production rules. These rules trace your configuration rule trees as the process runs so that you can see:

- The rules that were processed.
- The order in which the rules were processed.
- Whether each rule was interpreted as true or false.
- The value of the result fields.
- The effective date used to select the rule.

To trace the entire process, put a Start Trace rule at the beginning of your rule tree. The Start Trace rule should be the first rule processed. Put the End Trace rule at the end of rule tree. You can also trace any part of the processing of the rules by putting the Start Trace and End Trace rules before and after any section of the rule tree that you want to test.

Starting a Trace

The Start Trace rule starts the trace based on its position in the rule tree.

Note. To maximize performance, remember to inactivate your Start and End Trace rules before going into production with your system.

In the Condition field on the Rule page, you can enter a syntax expression to specify the conditions under which the Start Trace rule processes. If the Condition is interpreted as true, the trace starts as specified. A blank Condition field is interpreted as true.

For information about the Rule page, see Rule Page.

Rule - Start Trace Page

Usage	Use the Start Trace page to specify which rules to trace as the PeopleSoft Product Configurator processes.
Object Name	CP_RULE_DTL_ST
Navigation	Click the Go To Rule Details button on the Rule page.
Access Requirements	Select Start Trace as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule - Start Trace

SetID: SHARE **Functional Area:** Distribution **Rule:** ST-0000000

☐ Trace All Action Codes
☒ Trace Specific Action Codes

Configuration Detail
 Finalize Cost
 Finalize Date
 Finalize Price
 Global Variable
 Configured Component

OK Cancel

Rule - Start Trace page

SetID	The setID.
Functional Area	The functional area is either Distribution or Production.
Rule	The rule number.
Trace All Action Codes	Click to trace all rules.
Trace Specific Action Codes	Click to trace only specific types of rules. Select up to eight specific action codes to trace in the Trace Specific Action Codes fields.

After you define the trace codes, click **OK** to return to the Rule page.

Ending a Trace

The End Trace rule stops the tracing process based on its position in the rule tree.

To set up an End Trace rule, complete the information on the Rule page. A Rule Details page does not exist for the End Trace rule. Define the condition for ending the trace on the Rule page.

Rule - End Trace Page

Usage	Use the Rule page for the End Trace rule to define the condition for ending the trace.
Object Name	CP_RULE_HEADER_PNL
Navigation	Define Business Rules, Maintain Product Configurator, Use, Rule
Access Requirements	Select End Trace as the Action Code when creating a new rule or when defining parameters to access the Rule page.

Rule

SetID: SHARE Functional Area: Production *Status: Active

Rule: ET-9999999 *Rule Description: End Trace for Production Rules

Rule Attributes

*Action Code: End Trace Go to Rule Details...

Condition

Rule Miscellaneous

[Rule Processing Modes](#) [Rule Comments](#) Rule Copy

[Rule Effective Dates](#) [Rule Keywords](#) [Rule Delete](#)

Rule page - End Trace

SetID	The setID.
Functional Area	The functional area is either Distribution or Production.
Status	The status is either <i>Active</i> or <i>Inactive</i> .
Rule	The rule number.
Rule Description	A description for the rule.
Action Code	The Action Code indicates the action of the specific rule.
Go To Rule Details	This link is not available for selection when you define the Action Code as <i>End Trace</i> .

Condition

On the Rule page, enter a syntax expression to specify the conditions under which the End Trace rule processes. If the **Condition** is interpreted as true, the trace ends as specified. A blank **Condition** field is interpreted as true.

Click the **Syntax Wizard** button for the Syntax Builder.

For information about the Syntax Builder, see Syntax Builder Page.

Looking at the Results of a Distribution Trace

For a distribution trace, the results of your distribution configuration trace are displayed on the Rule Trace page when you're finished configuring a product using a sales order, a direct production order, or a direct requisition order.

After you test your configurator rules processing, and everything is running correctly, you can make the Start Trace and End Trace rules inactive, or you can change the effective date by clicking on Rule Effective Dates on the Rule page.

Rule Trace Page

Usage	Use the Rule Trace to view your Production rules that were used during the Product Configurator production process. You can view trace rules for configured products entered on sales orders, configured direct production orders, and configured direct configuration orders. The results appear on four tabs—General, Condition, Details, and Results. The trace rule is displayed when the configuration is complete.
Object Name	CP_TRACE_SEC
Prerequisites	The Start Trace and End Trace rules within your rule tree must be active.

Rule Trace

[Return](#)

Rule Trace Find First 1-25 of 25 Last

General Condition Details Results

	Rule	Action Code	Tree	Node	Sequence
1	ST-0000000	Start Trace	LT5010_TREE	1	1
2	BKDISP-00	Condition	LT5010_TREE	1	5
3	BKDISP-01	Condition	LT5010_TREE	5	5
4	BKPG-ALL	Page Generation	LT5010_TREE	7	1
5	BWCC-10	Configured Component	LT5010_TREE	5	15
6	BPRC-00	Condition	LT5010_TREE	1	10
7	BPRC-02	Secondary Variable	LT5010_TREE	2	5
8	BPRC-10	Global Variable	LT5010_TREE	2	10
9	BPRC-20	Global Variable	LT5010_TREE	2	15
10	BPRC-30	Global Variable	LT5010_TREE	2	20
11	BPRC-40	Global Variable	LT5010_TREE	2	25
12	BPRC-50	Global Variable	LT5010_TREE	2	30
13	BPRC-60	Global Variable	LT5010_TREE	2	35
14	BPRC-70	Global Variable	LT5010_TREE	2	40
15	X-BIKE_DIS				
16	BPRC-80	Finalize Price	LT5010_TREE	2	45

Rule Trace - General page

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

Rule The rule number.

General Tab

See the above exhibit for a view of this page.

Action Code The type of processing that the rule invokes

Tree The name of the tree that the rule is on.

Node The node number within the tree.

Sequence The sequence number within the node. The sequence indicates the order for processing the rules

Condition Tab

Rule Trace		
Return		
Rule Trace Find First 1-25 of 25 Last		
General Condition Details Results		
Rule	Condition	
1 ST-0000000		True
2 BKDISP-00		True
3 BKDISP-01		True
4 BKPG-ALL		True
5 BWCC-10	(O-BWHEEL_TYPE,="CST")	False
6 BPRC-00		True
7 BPRC-02		True
8 BPRC-10		True
9 BPRC-20	(O-BFRAME_MAT,="ALM")	False
10 BPRC-30	(O-BFRAME_MAT,="CFB")	False
11 BPRC-40	(O-BWHEEL_TYPE,="CST")	False
12 BPRC-50	(O-BPEDAL_TYPE,="CLP")	False
13 BPRC-60	((O-BSEAT_TYPE,="DPD-M"),OR,(O-BSEAT_TYPE,="DPD-W"))	False
14 BPRC-70		True
15 X-BIKE_DIS	*,*,*,,	
16 BPRC-80		True

Rule Trace - Condition page

Condition

A syntax expression of the condition that will be tested to determine whether to process the rule. The condition must evaluate to 0 for false or 1 for true.

This field is followed by the result of the evaluation of the rule (*True* or *False*.)

Details Tab

Rule Trace					
Return					
Rule Trace Find First 1-25 of 25 Last					
General Condition Details Results					
	Rule	Product ID	Item ID	Effective Date	Obsolete Date
1	ST-0000000		LT5010	01/01/1900	12/31/2099
2	BKDISP-00		LT5010	01/01/1900	12/31/2099
3	BKDISP-01		LT5010	01/01/1900	12/31/2099
4	BKPG-ALL		LT5010	01/01/1900	12/31/2099
5	BWCC-10		LT5010	01/01/1900	12/31/2099
6	BPRC-00		LT5010	01/01/1900	12/31/2099
7	BPRC-02		LT5010	01/01/1900	12/31/2099
8	BPRC-10		LT5010	01/01/1900	12/31/2099
9	BPRC-20		LT5010	01/01/1900	12/31/2099
10	BPRC-30		LT5010	01/01/1900	12/31/2099
11	BPRC-40		LT5010	01/01/1900	12/31/2099
12	BPRC-50		LT5010	01/01/1900	12/31/2099
13	BPRC-60		LT5010	01/01/1900	12/31/2099
14	BPRC-70		LT5010	01/01/1900	12/31/2099
15	X-BIKE_DIS			08/16/2000	08/16/2000
16	BPRC-80		LT5010	01/01/1900	12/31/2099

Rule Trace - Details page**Product ID**

The product ID.

Item ID

The item ID.

Effective Date

The first date that the rule becomes effective.

Obsolete Date

The date that the rule becomes obsolete. After that date, the rule will not be processed.

Results Tab

Rule Trace		
Return		
Rule Trace		
Find First 1-25 of 25 Last		
General	Condition	Details
Results		
Rule	Result1	Result2
1 ST-0000000		
2 BKDISP-00		
3 BKDISP-01		
4 BKPG-ALL		
5 BWCC-10		
6 BPRC-00		
7 BPRC-02	PRICE	800.00
8 BPRC-10	PRICE	800.00
9 BPRC-20		
10 BPRC-30		
11 BPRC-40		
12 BPRC-50		
13 BPRC-60		
14 BPRC-70	PRICE	800.00
15 X-BIKE_DIS		.99
16 BPRC-80	792.00	

Rule Trace - Results page**Result1**

The result for variable 1 in the syntax condition statement for the rule.

Result2

The result for variable 2 in the syntax condition statement for the rule.

Looking at the Results of a Production Trace

For production rule traces, the results are saved in the database. Use the Production Trace page to view production rules that were traced during the PeopleSoft CRM Sales Product Configurator production process.

After you test your configurator rules processing and everything is running correctly, you can make the Start Trace and End Trace rules inactive, or you can change the effective date by clicking on Rule Effective Dates on the Rule page.

For information about looking at the results of a production trace, see the Production Trace Page.

CHAPTER 10

Using PeopleSoft CRM Sales Product Configurator With PeopleSoft CRM Sales

The order entry process for configured products is straightforward, once you've completed your setup. You'll use PeopleSoft CRM Sales pages to enter the configured products.

Ordering Configured Products


Your customers will be able to refer to their own part numbers (or an alias) that refers to a specific product and configuration code combination when entering a configured product. Using customer part numbers or aliases is helpful for configured products because these are more specific than standard (non-configured) products. The product alias can represent the customer's part number, or it can refer to an alias assigned by the company for a promotional configured product.



After entering a configured product on the Order Lines Page, click the Configure button to select the configuration options for the product.

You can select the options for the configured product on the Order Entry - Configure page.

Order Entry - Configure Page

Usage	Use the Order Entry - Configure page to configure the product. The options that you defined with Page Generation rules will be displayed so that you can select the valid options for the configuration.
Object Name	CP_DYNAMIC_PANEL
Navigation	 Click the Configure button on the Opportunity Detail page.
Prerequisites	Set up Page Generation rules in PeopleSoft CRM Sales Product Configurator.
Access Requirements	Enter a configured product.

LT5010 - Custom Road Bike	
Frame Material	STL - Steel Frame
Frame Size	56 - 56 cm.
Frame Color	<input checked="" type="radio"/> BLK - Ebony Pearl Blk <input type="radio"/> BLU - Deep Ocn Blue <input type="radio"/> GRN - Rain Forest Grn <input type="radio"/> RED - Fire Engine Red <input type="radio"/> WHT - Mntn Snow White
Component Group	<input type="radio"/> CMP - Campagn Comps <input checked="" type="radio"/> SHM - Shimano Comps
Pedal Type	STD - Standard Set
Seat Type	GFLX-M - Gelflex Men's
Wheel Type	<input type="radio"/> CST - Custom Wheel (Add \$200) <input checked="" type="radio"/> STD - Standard Wheel
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>	

Order Entry - Configure page

Select the options for your configured product. If you select any invalid option combinations, you will receive a message so that you can select a valid option combination.

Click the **Cancel** button if you don't want to continue the configuration process. You must click **Continue** if you want to save the configured product on the order, even if you haven't changed any of the configuration options.

Viewing the Rule Trace

If your rule tree includes active trace rules, the trace runs during the configuration process. The Distribution rules that were traced for your configured sales order during the Sales Product Configurator production process are displayed when the process is complete.

For more information about tracing rules, see Starting a Trace. **For information** about seeing the results of the trace on the Rule Trace page, see Rule Trace Page.

Option Information Page

Usage	Use the Option Information page to view the option information after the online configuration has processed. This is a display-only page.
Object Name	CP_OPT_DTL_SEC
Navigation	Click the Option Info hyperlink on the Order Lines - Configuration Page.
Prerequisites	The configuration must process before any information will be displayed on this page.

Option Information		
Option Information		Find View All First ◀ 1-7 of 7 ▶ Last
Description		Option Value
Component Group		SHM
Frame Color		BLK
Frame Material		STL
Frame Size		56
Pedal Type		STD
Seat Type		GFLX-M
Wheel Type		STD
Return		

Option Information page

Each of the options is listed under the **Description**. You can see the selection for each **Description** under the **Option Value**.

Click the **Return** button to return to the Opportunity Detail page.

CHAPTER 11

Using Configuration Inquiries

Configuration inquiries provide information about PeopleSoft CRM Sales Product Configurator rules, configured orders, configured inventory, and configured production processing.

Inquiring on PeopleSoft CRM Sales Product Configurator Rules

There are three inquiries used for PeopleSoft CRM Sales Product Configurator rules: Selective Rules, Selective Trees, and Variable Search.

Selective Rule - Search Page

Usage	Use the Selective Rule inquiry page to search for specific rules based on criteria such as the action code or search key, or both. The information from this inquiry is similar to the information on the Summary Report.
Object Name	CP_RULE_SELECT_INQ
Navigation	Define Business Rules, Maintain Product Configurator, Inquire, Selective Rules, Selective Rule - Search
Access Requirements	Specify at least the SetID and Area.

Selective Rule - Search

Selective Rule Inquiry

SetID:

Area:

Rule Information

Action Code:

Effective Date:

Tree:

Keyword Search:

Search

Selective Rules - Selective Rule - Search page

SetID	Select the SetID. This is a required field.
Area	Select <i>Distribution</i> or <i>Production</i> . This is a required field.
Action Code	Limit the search by specifying the action code for the selected rules. Leaving the Action Code blank on this page returns all action codes.
Effective Date	The date that the rule becomes effective.
Tree	Limit the search by specifying a tree in which the rule is on.
Keyword Search	Limit the inquiry by specifying a search key. The search key field searches all five search key fields on the Rule - Rule Keywords page

Click the **Search** button to view the results of the search.

Selective Rule - Results Page

Usage	Use the Selective Rule - Results page to display the details of selected rules based on your selection criteria on the Selective Rule Inquiry page.
Object Name	CP_RULE_SELECT_IN2
Navigation	Click the Search button on the Selective Rule - Search Page.

Selective Rule - Search

Selective Rule - Results

SetID: SHARE

Area: Distribution

*Sort By: Rule Number

Search Results

Find | View All

First 1-13 of 49 Last

Rule Number	Rule Description	Action Code Description	Active
BCD-00	Branch for Configuration Details	Condition	N
BCD-10	Print Bike Base Price	Configuration Detail	Y
BCD-20	Print Aluminum Price	Configuration Detail	Y
BCD-30	Print Carbon Fiber Price	Configuration Detail	Y
BCD-40	Print Custom Wheel Price	Configuration Detail	Y
BCD-50	Print Pedal Price	Configuration Detail	Y
BCD-60	Print Seat Price	Configuration Detail	Y
BCD-65	Print MSRP	Configuration Detail	N
BCD-70	Print Discount Amount	Configuration Detail	Y
BCD-80	Print Total Price	Configuration Detail	Y
BCST-00	Branch for Costing Rules	Condition	Y
BCST-10	Base Cost	Global Variable	Y
BCST-20	Aluminum Frame Cost	Global Variable	Y

Selective Rules - Selective Rule - Results page

SetID	The setID.
Area	The functional area: <i>Distribution</i> or <i>Production</i> .
Sort By	Select <i>Action Code</i> , <i>Active</i> , or <i>Rule Number</i> for the sort.
Rule Number	Click to show the detail entry for a specific rule number.
Rule Description	The description for the rule.
Action Code Description	The action code for the rule. The action code defines the type of processing that the rule invokes.
Active	Shows whether the rule is currently active (Y) or inactive (N).

Selective Tree - Search Page

Usage	Use the Selective Tree search page to access the available trees that a specific PeopleSoft CRM Sales Product Configurator rule is on.
Object Name	CP_TREE_SELECT_INQ
Navigation	Define Business Rules, Maintain Product Configurator, Inquire, Selective Trees, Selective Tree - Search

Selective Trees - Selective Tree - Search page

SetID	Select the SetID. This is a required field.
Area	Select the functional area: <i>Distribution</i> or <i>Production</i> . This is a required field.
Rule	Select the rule from the list. This is a required field.

Click the **Search** button to view the results of the search.

Selective Tree - Results Page

Usage	Use the Selective Tree results page to view a list of trees and the key information based on the criteria you entered on the Selective Tree - Search page.
Object Name	CP_TREE_SELECT_IN2
Navigation	Click the Search button on the Selective Tree - Search Page.

Selective Trees - Selective Tree - Results page

SetID	The setID.
Area	The functional area: <i>Distribution</i> or <i>Production</i> .
Rule	The rule number.
Tree(s)	Click the tree name to display the Tree page.

For information about the Tree page, see Tree Page.

Tree Description	The description for the tree.
-------------------------	-------------------------------

Node Number	The node in which the rule number that you are searching for is located on the tree.
Tree Sequence	The sequence the rule is located on the tree.

Variable Type - Search Page

Usage	Use the Variable Type search function to search for the variable type codes that exist in your Sales Product Configurator rules. The Variable Type search function searches for the specified variable type in the following rules: Template, Internal Query, Constraint, Matrix, and Rule.
Object Name	CP_VAR_INQ
Navigation	Home, Define Business Rules, Maintain Product Configurator, Inquire, Variable Search

Variable Type - Search page

SetID	Select the SetID. This is a required field.
Type	Select the variable type from the available options. This is a required field.
Variable	Select the variable from the available options. This is a required field.
Area(s) to Search	Limit your search by specifying which areas of the PeopleSoft CRM Sales Product Configurator maintenance pages to search. Clear the check boxes to exclude specific areas from the inquiry.
Search	Click to display the query results on the Variable Type - Results Page.

Variable Type - Results Page

Usage	Use the Variable Type - Results page to display the details of selected rules based on your selection criteria on the Variable Type - Search Page.
Object Name	CP_VAR_IN2
Navigation	Click the Search button on the Variable Type - Search Page.

Variable Type - Search | Variable Type - Results

SetID: SHARE Type: Option Variable: BFRAME_COLOR

Search Results View All First 1-4 of 4 Last

Area	Variable Value	Detail
Matrix	BIKE_DISC	
Matrix	BIKE_COLORS	
Rule	BKPG-ALL	
Template	LT5010_TMP	

[Variable Type - Search](#) | [Variable Type - Results](#)

Variable Type - Results page

The **SetID**, the **Type**, and the **Variable** you specified for your inquiry displays.

Area	Identifies the area the corresponding Variable Value was located. The areas searched include: <i>Template</i> , <i>Internal Query</i> , <i>Constraint</i> , <i>Matrix</i> , and <i>Rule</i> .
Variable Value	Click to navigate to the Rule Page, where you can access specific details about the corresponding variable.
Detail	Displays the syntax expression that contains the search variable.

Inquiring on Configured Production Processing

There are several inquiry tools to use to display information about your production processing:

Message Log - Search Page

Usage	Use the Message Log - Search page to check the status of a PeopleSoft CRM Sales Product Configurator process after it has completed.
Object Name	MESSAGE_LOG
Navigation	Define Business Rules, Process Product Configurator, Inquire, Message Log, Message Log - Search
Access Requirements	Use the Process Instance from the PeopleSoft Process Monitor or the Job ID.

Message Log - Message Log - Search page

Search Criteria	Select <i>Instance and Job ID</i> , <i>Job ID</i> , or <i>Process Instance</i> .
Instance	Select the beginning of the range to search.
To Instance	Select the end of the range to search.
Job ID	Optionally, enter the job ID.

Click the **Search** button to view the results of your inquiry.

Message Log - Results Page

Usage	Use the Message Log - Results page to display status messages from production processes.
Object Name	MESSAGE_LOG2
Navigation	Click the Search button on the Message Log - Search Page.

Instance	Job ID	Time	Message
5265	APP ENGINE	09.50.54	BICRC000 Started.
5265	APP ENGINE	09.50.54	BICRC000 Completed Successfully.
5265	PRCS SCHDL	09.51.10	Successfully posted generated files to the report repository

Message Log - Message Log - Results page

Instance	The process instance from the PeopleSoft Process Monitor.
Job ID	The job ID from the PeopleSoft Process Monitor.

Time	The time the process ran.
Message	Displays the message from different steps of the production process.
Details	Click the Details link to display more detailed (technical) information for the current message.

Production Trace Page

Usage	Use the Production Trace page to view, individually, the Production rules that were traced for your configured sales order during the PeopleSoft CRM Sales Product Configurator production process. When the trace is active, the Production Trace page will show all of the rules on the tree. The trace shows which rules were used and their corresponding results.
Object Name	CP_RULE_TRACE_INQ
Navigation	Define Business Rules, Process Product Configurator, Inquire, Production Trace.
Access Requirements	Specify the Business Unit and Order Number.

Production Trace

Business Unit: US001 Order No: LPL-000005 Order Line: 1 [Delete Rule Trace](#)

Rule Trace
Find | View All
First ◀ 9 of 15 ▶ Last

SetID:	SHARE	Tree:	LT5010_PRDN_TREE
Area:	Production	Node:	2
Rule:	BKCL-70	Sequence:	30
Action Code:	CL		
Item ID:	LT5010	Effective Date:	01/01/1900
Product ID:	LT5010	Obsolete Date:	12/31/2099
Condition:	True		
Result1:	LT5000		
Result2:	2		

Production Trace page

Business Unit	The business unit.
Order No (order number)	The order number.
Order Line	The order line.
Delete Rule Trace	Click this link to delete the trace.
SetID	The SetID.
Area	The functional area is either <i>Distribution</i> or <i>Production</i> .

Rule	The rule number.
Action Code	The type of processing that the rule invokes.
Item ID	ID for the specific configured item.
Product ID	ID for the specific configured product.
Condition	The evaluation of the rule syntax (<i>True</i> or <i>False</i>).
Result1	The result for variable 1 in the syntax condition statement for the rule.
Result2	The result for variable 2 in the syntax condition statement for the rule.
Tree	The name of the tree.
Node	The node number within the tree.
Sequence	The sequence number within the node. The sequence indicates the order for processing the rules.
Effective Date	The first date that the rule becomes effective.
Obsolete Date	The date that the rule becomes obsolete. After that date, the rule will not be processed.

Production Errors Page

Usage	Use the Production Errors inquiry page to display the rules that are associated with the error, the error, the link to the trace rule, and other relevant information that may be useful to resolve the error.
Object Name	CP_PRDN_ERROR_INQ
Navigation	Define Business Rules, Process Product Configurator, Inquire, Production Errors
Access Requirements	Enter the Business Unit and Order Number.

Production Errors	
Business Unit:	US001
Order No:	NEG-01
Errors Find View All First 1 of 1 Last	
Order Line:	1
Product ID:	LT5010
Inventory Business Unit:	US008
Item:	LT5010
Tree:	LT5010_PRDN_TREE
Parent Item ID:	
SetID:	SHARE
Action:	GV
Rule:	BKCL-80
Error Type:	Rule Result2 Error
Message Set Number:	15690, 61
Invalid Negative Numeric: Rules cannot contain or result in a negative number.	
User ID:	VP1
Run Control ID:	RM
Process Instance:	5198

Production Errors inquiry page

Business Unit	The business unit.
Order No (order number)	The order number.
Order Line	The sales order line number.
Product ID	ID for the specific configured product.
Inventory Business Unit	The business unit.
Item	ID for the specific configured item.
Tree	The name of the rule tree that processed for the configuration.
Parent Item ID	ID of the parent item.
SetID	The setID.
Action	Action code that indicates the type of processing that the rule invokes.
Rule	The rule number (a hyperlink). Click the Rule hyperlink to return to the Rule page so that you can correct any rule-related errors (in Update/Display mode).
Error Type	Shows the part of the rule where the error is.
Message Set Number	Displays the message number with the text of the message.
User ID	The user ID.
Run Control ID	Process scheduler information.
Process Instance	Process scheduler information.

Production Compare - Header Page

Usage	<p>The Production Compare - Header page summarizes the production changes. You can see which of the three pages has information that has changed and view the old and new production information.</p> <p>You can use an inquiry page to manage changes to configured sales orders, once production is already in process. You have the option to create new production for any changes or inquire on the changes that would be needed for the new configuration. This inquiry page displays the effect that a sales order change has on production orders that are already generated for that order.</p>
Object Name	CP_PRDN_CMPR_HDR
Navigation	Define Business Rules, Process Product Configurator, Inquire, Production Compare, Header

Header Component List Operation List

Unit: US001 Order No: CP-11 Line: 1 [Production Compare Delete](#)

Header?: Yes Component List?: No Operation List?: No

Production Information Find | View All First 1 of 2 Last

Old Production ID: PRD00214

IN Unit: US008 **Area:** CUSTOM **Quantity:** 1.0000 EA

Item ID: LT5010

Configuration Code: STL-56-BLK-CST-STD-GFLX-M-SHM

New Production ID: PRD00216

IN Unit: US008 **Area:** CUSTOM **Quantity:** 5.0000 EA

Item ID: LT5010

Configuration Code: STL-56-RED-CST-STD-DPD-M-SHM


Production Compare - Header page

Unit	The business unit.
Order No (order number)	The order number.
Line	The line number.
Production Compare Delete	Click to delete the production compare inquiry.
Header?	Indicates whether the change affects the header.
Component List?	Indicates whether the change affects the component list.
Operation List?	Indicates whether the change affects the operation list.
Old Production ID,	The old production ID and its related information is in the top part of the Product Information group box.
New Production ID	The new production ID and its related information is in the bottom part of the Product Information group box.
IN Unit (inventory unit)	Inventory business unit.


Item ID	The item ID.
Configuration Code	The configuration code for the ordered item.
Area	The area that is displayed.
Quantity	The quantity that is ordered with the unit of measure.

Production Compare - Component List Page

Usage	Use the Production Compare - Component List page to view the old and new Production Bill of Material information.
Object Name	CP_PRDN_CMPR_CL
Navigation	Define Business Rules, Process Product Configurator, Inquire, Production Compare, Component List


Header		Component List		Operation List	
Unit:	US001	Order No:	CP-11	Line:	1
Production Compare Delete					
Old and New Production Information					
Find View All First 1-7 of 28 Last					
Comp Seq	Component ID	Op Seq	Per Qty	Yield	Non-Owned
New 1	FR7001		10 ASY 1.0000000000	100.0	N
New 1	GR8000		30 ASY 1.0000000000	100.0	N
New 1	GR8002		30 ASY 1.0000000000	100.0	N
New 1	GR8004		30 ASY 1.0000000000	100.0	N
New 1	GR8007		30 ASY 1.0000000000	100.0	N
New 1	LT3007		20 ASY 1.0000000000	100.0	N
New 1	LT5011 		30 ASY 2.0000000000	100.0	N

Production Compare - Component List page

Unit	The business unit.
Order No (order number)	The order number.
Line	The line number.
Production Compare Delete	Click to delete the production compare inquiry.
Comp Seq (component sequence)	The component sequence number and whether the sequence is new or old.
Component ID	The ID of the component.
	Click to see the Component's Configuration Code Page.
Op Seq (operation sequence)	The operation sequence indicates where in the manufacturing process you need the components.

Per	Defines whether the component quantity applies to each item or to each production run: <i>Order</i> is for each item. <i>Assembly</i> is for each assembly.
Qty (quantity)	The quantity needed.
Yield	Using the percentage Yield for each component, you can track resource use by configuration.
Non-Owned	<i>Y</i> indicates that the component is non-owned for accounting purposes. <i>N</i> indicates that the component is owned.

Component's Configuration Code Page

Usage	Use the Component's Configuration Code page to view the configuration code of the component.
Object Name	CP_PRDN_CMPR_SEC1
Navigation	Click  on the Component List page.

Component's Configuration Code

Business Unit: US001
Order No: CP-11
Order Line: 1

Component ID: LT5011
Configuration Code: BOX-ALM-ALM-700X23



Component's Configuration Code page

Business Unit	The business unit.
Order No (order number)	The order number for the component.
Order Line	The order line for the component.
Component ID	The component ID.
Configuration Code	The configuration code.

Click **OK** to return to the Component List page.

Production Compare - Operation List Page

Usage	The Operation List page displays the old and new production routing information. You can view the Component Sequence and Operation Sequences for the order line.
Object Name	CP_PRDN_CMPR_OP
Navigation	Define Business Rules, Process Product Configurator, Inquire, Production Compare, Operation List

Header		Component List		Operation List	
Unit:	US001	Order No:	CP-11	Line:	1
Production Compare Delete					
Old and New Production Information				Find View All First  1-10 of 10  Last	
Component Sequence			Operation Sequence		
New		1			10
New		1			20
New		1			30
New		1			40
New		2			30
Old		1			10
Old		1			20
Old		1			30
Old		1			40
Old		2			30

Production Compare - Operation List page

Unit	The business unit.
Order No (order number)	The order number.
Line	The line number.
Production Compare Delete	Click this link to delete the production compare inquiry.
Component Sequence	The component sequence and whether the sequence is new or old.
Operation Sequence	The operation sequence indicates where in the manufacturing process you need the components.

Sales Order Page

Usage	Use the Sales Order page after you enter a sales order number, to display information on the sales order and the production ID generated for the order. The information is collected from the Option Header table that stores the related Production ID. The Order Inquiry displays item and quantity information.
Object Name	CP_ORD1_INQ_PNL
Navigation	Define Business Rules, Process Product Configurator, Inquire, Sales Order

Sales Order						
Business Unit:		US001	Order No:		CP-01	
Manufacturing Information						
Find View All						
First 1-2 of 2 Last						
General Information		Additional Information				
Order Line	Production ID	Item ID	Configuration Code	Original Production Qty	Completed Qty	
1	PRD00209	LT5010	STL-56-BLK-CST-STD-GFLX-M-SHM	1.0000	0.0000	
1	PRD00210	LT5011	AER-STL-STL-700X23	2.0000	0.0000	

Sales Order - General Information page

The **Business Unit** and **Order Number** are displayed above the tab area.

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

The title of the grid area indicates whether the information is manufacturing information, purchasing information, or sales order information.



Order Line	The order line number.
Production ID	Click the Production ID hyperlink to access the Production ID Maintenance page.
Item ID	The item ID.
Configuration Code	The configuration code for each item on the sales order.

General Information Tab

See the above exhibit for a view of this page.

Original Production Qty (original production quantity)	The original production quantity.
Completed Qty (completed quantity)	The completed quantity.

Additional Information Tab

Sales Order					
Business Unit:		US001	Order No: CP-01		
Manufacturing Information					
Find View All First  1-2 of 2  Last					
General Information		Additional Information			
Order Line	Production ID	Item ID	Configuration Code	Prdn Due Date	Status
1	PRD00209	LT5010	STL-56-BLK-CST-STD-GFLX-M-SHM	08/11/2000	Released
1	PRD00210	LT5011	AER-STL-STL-700X23	08/11/2000	Released

Sales Order - Additional Information page

Prdn Due Date (production due date) The production due date.

Status The status of the order line.

Direct Production Page

Usage	<p>Use the Direct Production page to display information about direct production.</p> <p>This inquiry page also gives information about the requisitions for the order.</p> <p>The title of the grid area indicates that the information is manufacturing (production) information. You can click the Production ID to access information about the production order.</p> <p>The information is collected from the Option Header table that stores the related Production ID. The Direct Production Order Inquiry page displays the production IDs for each item. You can click on the Production ID to display additional details about the direct production order.</p>
Object Name	CP_ORD1_INQ_PNL
Navigation	<p>Define Business Rules, Process Product Configurator, Inquire, Direct Production, Direct Production</p> <p>Define Business Rules, Process Product Configurator, Inquire, Direct Requisition, Direct Requisition</p> <p>Define Business Rules, Process Product Configurator, Inquire, Sales Order, Sales Order</p>

Direct Production					
Business Unit: US008		Order No: CPP0000007			
Manufacturing Information					
General Information			Find View All		
Additional Information			First 1 of 1 Last		
Order Line	Production ID	Item ID	Configuration Code	Original Production Qty	Completed Qty
1	PRD00208	LT5010	STL-56-BLK-STD-STD-GFLX-M-SHM	1.0000	0.0000

Direct Production - Direct Production: General Information page

The **Business Unit** and **Order Number** are displayed above the tab area.

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

Order Line	The order line number.
Production ID	Click the Production ID hyperlink to access the Production ID Maintenance page.
Item ID	The item ID.
Configuration Code	The configuration code.

General Information Tab

See the above exhibit for a view of this page.

Original Production Qty (original production quantity)	The original production quantity.
Completed Qty (completed quantity)	The completed quantity.

Additional Information Tab

Direct Production					
Business Unit: US008		Order No: CPP0000007			
Manufacturing Information					
Find View All First 1 of 1 Last					
General Information		Additional Information			
Order Line	Production ID	Item ID	Configuration Code	Prdn Due Date	Status
1	PRD00208	LT5010	STL-56-BLK-STD-STD-GFLX-M-SHM	08/07/2000	Released

Direct Production - Direct Production: Additional Information page

Prdn Due Date (production due date)	The production due date.
Status	The status of the order line.

Direct Requisition Page

Usage	Use the Direct Requisition inquiry page to display information about direct requisitions or production orders. You can click the Requisition ID to access information about the requisition or production order.
Object Name	CP_ORD1_INQ_PNL
Navigation	Define Business Rules, Process Product Configurator, Inquire, Direct Production, Direct Production Define Business Rules, Process Product Configurator, Inquire, Direct Requisition, Direct Requisition Define Business Rules, Process Product Configurator, Inquire, Sales Order, Sales Order
Access Requirements	Select Requisition.

Direct Requisition

Business Unit: U8008 Order No: CPR0000003

Purchasing Information									
Order Line	Requisition ID	Line	Item ID	Configuration Code	Req Qty	UOM	Price	Due Date	Time Due
1	CP-REQ-01	1	BKCS-1	62LX48WX7D-HARD-Y-Y	1.0000	EA	179.95000	08/08/2000	12:00:00AM

Direct Requisition - Direct Requisition inquiry page

You'll see the requisition detail.

Business Unit	The business unit.
Order No (order number)	The order number.
Order Line	The order line number.
Requisition ID	Click the link in the Requisition ID field to access the Requisitions - Form Page, where you can view further details about the configured order.
Line	The line number.
Item ID	The item ID.
Configuration Code	The configuration code.
Req Qty (required quantity)	The required quantity.
UOM (unit of measure)	Unit of measurement.
Price	The price of the item.

Due Date The date the order is due.

Time Due The time the order is due.

Configured Inventory - Search Page

Usage	The Configured Inventory inquiry page displays information and availability for the item that you select.
Object Name	CP_INVI_INQ_PNL
Navigation	Define Business Rules, Process Product Configurator, Inquire, Inventory, Configured Inventory - Search

Configured Inventory - Search

Inventory Criteria

Business Unit: COLORADO BIKE MFG/OUTDOOR

Item ID: Custom Road Bicycle

Config Code:

Inventory - Configured Inventory - Search page

Business Unit Select the business unit from the available options.

Item ID Select an item ID from the available options.

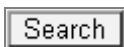
Config Code (configuration code) Select a configuration code from the available options. There are three methods for selecting a configuration code:

- Select one from the available options.
- Use the **Configuration Code Template Wizard** button to display the configuration code template for the item.
- Leave the **Config Code** field blank, and the search will result in all configuration codes for the item.



Click the **Configuration Code Template Wizard** button to display the configuration code template for the item.

For more information, see the configuration code Template Page.



Click the **Search** button to search for configured inventory information.

Configured Inventory - Results Page

Usage	The Inventory Inquiry page displays information about configured items.
Object Name	CP_INV1_INQ_PNL2
Navigation	Click the Search button on the Configured Inventory – Search page.
Access Requirements	Enter an Inventory Business Unit, an Item ID, and a Configuration Code.

Configured Inventory - Search		Configured Inventory - Result	
Inventory		*Sort By: Configuration Code	
Inventory Information		Find View All First 1 of 1 Last	
Business Unit	Item ID	Lot ID	Cfg/Lot Description Qty On Hand Qty Available UOM Status
US008	LT5010	BIKE-LOT-01	N Bike Lot 01 97.0000 97.0000 EA Open Access

Inventory - Configured Inventory - Result: Inventory Information page

Note. Multiple views of this page are available by clicking the tabs in the scroll area. We document fields common to all views first.

Common Page Information

Sort By	Sort by <i>Configuration Code</i> , <i>Lot ID</i> , <i>Quantity Available</i> , <i>Quantity on Hand</i> , or <i>Status</i> .
Business Unit	The inventory business unit.
Item ID	The item ID.

Inventory Information Tab

See the above exhibit for a view of this page.

Lot ID	Click Lot ID to drill down to the Inventory Inquiry by Lot page.
Cfg/Lot (configuration/lot)	Indicates whether the lot is configured.

Description	The description of the item.
Qty On Hand (quantity on hand)	Quantity on hand.
Qty Available (quantity available)	Quantity available.
UOM (unit of measure)	Unit of measure.
Status	Displays the status.

Config Code Tab

The screenshot shows a web application interface for 'Configured Inventory - Result'. It has a tabbed interface with 'Inventory Information' and 'Config Code' tabs. The 'Config Code' tab is active, displaying a table with the following data:


Business Unit	Item ID	Configuration Code
US008	LT5010	STL-56-BLK-CST-STD-GFLX-M-SHM

Navigation controls include 'Find | View All', 'First', '1 of 1', and 'Last'. A '*Sort By:' dropdown menu is set to 'Configuration Code'.

Inventory - Configured Inventory - Result: Config Code (configuration code) page

Configuration Code	The configuration code for the item.
---------------------------	--------------------------------------

Configured Inventory - Configuration Code Template Page

Usage	<p>Use the Configuration Code Template page to display the template, which contains details describing each position in the 50-character configuration code.</p> <p>You can use wild cards in the search. For example, when you enter an asterisk in the field where you want a wild-card search, you can specify a search for a black color by leaving the COLOR field blank in the Wildcard Template Search page. This retrieves all colors (including BLK). If you enter <i>B</i> or <i>B*</i>, you'll get all values that begin with B. To restrict the search a bit more, enter <i>BL*</i>, and you will get everything that starts with BL. Each additional character restricts the search further.</p> <p>Clicking OK returns you to the inquiry page, where you will see that the configuration code has been padded with special characters for the search.</p> <p>You can't change the wild-card search value if you aren't on the Config Code Template Wizard Search page.</p>
Object Name	CP_INV1_TEMP_PNL
Navigation	Click  on the Configured Inventory Search page.
Access Requirements	<p>Enter a value in the Value field for the Item for which you want to search.</p> <p>Enter an asterisk (*) to do a wild-card search.</p>

Configuration Code - Configuration Code Template Breakdown			
Configuration Code Breakdown		Find View All	First 1-13 of 13 Last
Description	Value	From	To
Frame Material	STL	1	3
-	-	4	4
Frame Size	56	5	6
-	-	7	7
Frame Color	BLK	8	10
-	-	11	11
Wheel Type	CST	12	14
-	-	15	15
Pedal Type	STD	16	18
-	-	19	19
Seat Type	GFLX-M	20	25
-	-	26	26
Component Group	SHM	27	29

Configuration Code - Configuration Code Template Breakdown page

Description	Each row defines one element of the configuration code.
Value	The variable value for the element.
From	Each element in the configuration code can occupy from 1 to 18 characters in the code. From is the starting position for the element in the configuration code.
To	To is the ending position for the element in the configuration code.

For more information about configuration codes, see Working with Configuration Codes.

Configured Bill of Materials - Search Page

Usage	Use the Configured Bill of Materials search page to enter your search criteria for the Configured Bill of Materials inquiry.
Object Name	CP_BOM_INQ_PNL
Navigation	Define Business Rules, Process Product Configurator, Inquire, Configured BOM, Configured BOM - Search

Configured BOM - Configured BOM - Search (configured bill of materials - search) page

Business Unit

The Inventory Business Unit. This is a required field.

Item ID

ID for the specific configured item. Only Configuration Costed items are allowed in the **Item ID** field. The Configuration cost flag is set up during item definition. This is a required field.

Item Depth

The maximum number of component levels to be displayed for the costed BOM inquiry. The total of costs for the components displays at the bottom of the grid.

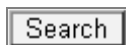
Use **999** to indicate the maximum depth.

The cost is derived from the component's This Level Cost and Lower Level Cost for the cost type and version selected, and it is calculated for all assemblies and subassemblies that fall within that depth.

Note. It is best to select the maximum depth for revision-controlled bills of material.

Configuration Code

The configuration code for the item. This is a required field. No wild cards are allowed.



After you enter the selection information, click **Search** to display component costed information for the specific configured item.

Configured Bill of Materials - Results Page

Usage	<p>Use a costed Bill of Materials (BOM) inquiry to view costing information for configurable items and any related configured subassemblies. A Bill of Materials lists all of the component inputs into a product.</p> <p>A fully indented, costed Bill of Materials is a view that provides a multilevel cost analysis showing both the parent items' fully rolled-up cost details and all appropriate subassemblies' lower-level cost details.</p> <p>The Cost Information group box at the bottom of the page shows the cost for this level, the lower-level cost, and the total cost.</p>
Object Name	CP_BOM_INQ_PNL2
Navigation	Click the Search button on the Configured Bill of Materials – Search page.
Prerequisites	You can view the fully costed BOM after the you create a Product ID, complete production, and close accounting.

Configured BOM - Search					
Configured BOM - Results					
Material List					
Find View All First 1-11 of 18 Last					
Cost Information					
Level	Component ID	Description	Parent Item	Lower Level Cost	This Level Cost
1	FR7001	Bike Frame, Steel	LT5010		0.3690
1	GR8000	Gear, Sugishita	LT5010		2.9400
1	GR8002	Chain, Sugishita	LT5010		4.6900
1	GR8004	Crank Arm, Sugishita IG-90	LT5010		5.9800
1	GR8007	Derailleurs, Sugishita	LT5010		18.4500
1	LT3011	Black Paint	LT5010		6.7900
1	LT5011	Custom Road Bicycle Wheel	LT5010	10.3788	20.0375
1	LT5011	Custom Road Bicycle Wheel	LT5010	10.3788	20.0375
1	PS1002	Pedal, Standard	LT5010		3.2100
1	ST8000	Bike Seat, Gelflex Racing, Men	LT5010		15.4700
2	LT5002	Wheel Tire, 700x23	LT5011		2.9240
Cost Information					
This Level Cost:		66.2212	Lower Level Cost:	118.7316	Total Cost: 184.9528

Configured BOM - Configured BOM - Results: Cost Information page

Level	The level of subordination to the Item ID on the BOM costed inquiry.
Component ID	The ID of the component.
Description	Description of the configured component.
Parent Item	The parent item.
Lower Level Cost	The costs for the lower-level line. The total cost is derived from the component's This Level Cost and Lower Level Cost for the cost type and version selected. It is calculated for all assemblies and subassemblies that fall within the specified depth.

This Level Cost

The costs for this line level. The total cost is derived from the component's **This Level Cost** and **Lower Level Cost** for the cost type and version selected. It is calculated for all assemblies and subassemblies that fall within the specified depth.

Configured BOM - Configured BOM - Results: Additional Information Tab

Configured BOM - Search		Configured BOM - Results	
Material List			
Find View All		First	1-11 of 18
Cost Information		Additional Information	
Level	Component ID	Component Configuration Code	
1	FR7001		
1	GR8000		
1	GR8002		
1	GR8004		
1	GR8007		
1	LT3011		
1	LT5011	AER-STL-STL-700X23	
1	LT5011	BOX-STL-STL-700X23	
1	PS1002		
1	ST8000		
2	LT5002		
Cost Information			
This Level Cost:		66.2212	Lower Level Cost: 118.7316
		Total Cost:	184.9528

Configured BOM - Configured BOM - Results: Additional Information page

The display that results from this inquiry includes the following fields:

Component Configuration Code

The configuration code of the component.

Total Cost

At the bottom of the page is the **Total Cost** field—the sum of all the extended costs of all components on a manufacturing BOM for a given effective date or revision date, plus only This Level costs for the item. The system computes costs for each component, and then sums those values for the assembly item.

Depending on the level of the inquiry, there are times when the same revision-controlled BOM may reflect different costs. For example:

If you enter a depth that is less than the maximum number of levels for the costed BOM, then the lower-level costs displayed reflect the costs that are generated by the original cost roll-up for this cost version and date.

If, however, you enter the maximum depth for the costed BOM, the lower-level costs displayed reflect the most current BOM and routing, not the cost version that you entered on the Costed BOM page.

In addition, if changes occur to the BOM and routing after the cost roll-up, the cost of the BOM where you have entered a depth that is less than the maximum may reflect something

different than the cost from the maximum depth BOM. Both of these costed BOMs are considered correct, depending on the depth you enter.

Note. The **Level**, **Component ID**, **Description**, and **Parent Item** fields are equivalent to the information displayed in the current cost inquiry for non-configured items.

The roll-up is performed using the most recent production ID existing on the system. The components from the production ID are joined to the Cost table, to read in the costs. After the first level is done, any additional levels are added to the chart, based on further configured components.

Costs for each of the assembly item's components must exist for the cost type and version selected for the system, to calculate the cost correctly. This page performs a basic cost roll-up, calculating the assembly cost by summarizing the cost of the components based on the manufacturing bill of materials that is in effect on the date specified or for the revision specified. Routing costs are not recalculated. The existing This Level labor, machine, subcontracting and overhead costs for the cost type and version are used. The roll-up uses the item's material costs for the cost type and version selected.

Product Kit Inquiry Page

Usage	Use the Product Kit Inquiry page to display the components that make up your configured kit.
Object Name	CP_PRODKIT_INQ
Navigation	Define Business Rules, Process Product Configurator, Inquire, Configured Kit, Product Kit Inquiry
Access Requirements	Enter the Business Unit, Order Number, and Line.

Product Kit Inquiry

Business Unit: US001 **Order No:** EAS0004 **Order Line:** 1

Product Kit: BK1000-KIT
Configuration Code: TSHRTLSMEN-USX-FRAME-N

Component List					Find View All	First	1-4 of 4	Last
Product ID	Description	Quantity	UOM	Ship w/o				
10002	Long Sleeve T-Shirt, Men's	1.0000	EA	Asy				N
10011	Biking Gloves, Unisex	1.0000	EA	Asy				N
10020	Hand Pump, Frame Attachment	1.0000	EA	Asy				N
10026	Patch Kit	1.0000	EA	Asy				N

Configured Kit - Product Kit Inquiry page

Business Unit The business unit.

Order No (order number) The order number.

Order Line The order line number.

Product ID	The product ID of the kit component.
Description	Description of the kit component.
Quantity	The quantity to include in the kit.
UOM (unit of measure)	Unit of measure for the component.
Ship w/o (ship without)	Indicates whether the kit can be shipped without the specific component (<i>Y</i>) or not (<i>N</i>).

CHAPTER 12

PeopleSoft CRM Sales Product Configurator Reports

The following is a list of the product configurator specific reports provided with PeopleSoft CRM Sales Product Configurator:

<i>Report ID</i>	<i>Report Name</i>	<i>Description</i>	<i>Report Type</i>
CPS1000	Rule Report	Creates a detail report or a summary report on the configuration rules. A Summary Rule report is a type of Rule Report that lists configuration rules—one rule per line. Limited fields are shown. A Detail Rule report is a type of Rule Report that shows all of the configuration rule fields for each rule, sequentially.	SQR
CPS2000	Tree Report	Creates a report on a specific configuration rule tree—either a Distribution tree or a Production tree. The report displays the configuration rules in the order that they process.	SQR
CPS3000	Production Compare Report	Creates a report that displays production information for configured sales orders that have been changed after production IDs have been created.	SQR

Rule Report Page

Usage	Use the Rule Report page to create a detail report or a summary report of the rules.
Object Name	RUN_CPS1000
Navigation	Define Business Rules, Maintain Product Configurator, Report, Rule Report, Rule Report
Access Requirements	Enter a Run Control ID.

Rule Report - Rule Report page

The **Run Control ID** you selected or entered to access this page is displayed.

Set ID	Select the Set ID from the drop-down list of values.
Functional Area	The functional area is either <i>Distribution</i> or <i>Production</i> .
Criteria Rule Report	If you select Criteria Rule Report , enter the appropriate information for Report Type , Tree , Action Code , and Keyword Search , and select Show Inactive Rules .
Specific Rule Report	If you select Specific Rule Report , enter the Report Type and select Show Inactive Rules .
Report Type	Select <i>Detail Report</i> or <i>Summary Report</i> from the drop-down list. This field applies to both a Criteria Rule Report and a Specific Rule Report .
Tree	Select the rule tree for the Rule Report. This field applies only to a Criteria Rule Report .
Rule	Select the rule for the rule report. This field applies only to a Specific Rule Report .
Action Code	Indicate the Action Code for the Rule Report. This field applies only to a Criteria Rule Report .
Keyword Search	Specify a keyword to use in a rule search. This field applies only to a Criteria Rule Report .
Show Inactive Rules	If you select this check box, both active and inactive rules will be on the Rule Report. If the check box is not selected, the inactive rules will not be on the report. This field applies only to a Criteria Rule Report .

Rule Report

Description	Create a summary report or a detail report on the rules. A Summary Rule report is a type of Rule Report that lists rules—one rule per line. A Detail Rule report is a type of Rule Report that shows all rule fields for each rule, sequentially.
Report ID	CPS1000
Type of Report	SQR
Parameters	SetID, Functional Area, Report Type, Tree, and Action Code
Source	CPS1000.SQR
Sorted By	Rule Number

Creating a Summary Rule Report

Select *Summary Report* as the Report Type on the Rule Report page.

The fields on the Summary Rule Report include:

Rule number	References the rule number you defined when you created the rule on the Rule page.
Description	A user-defined description of the rule from the Rule page.
Action code	An action code defines which kind of action the rule will perform. It is specified on the Rule page.
In effect	The first date that the rule becomes effective. This information comes from the Rule Effective Dates page that is accessed by a link from the Rule page.
Obsolete	The date that the rule becomes obsolete. This information comes from the Rule Effective Dates page that is accessed by a link from the Rule page.
Status	Valid values are <i>Active</i> or <i>Inactive</i> . Rule status is defined on the Rule page.

For samples of this and other reports in your application, see the PDF files that are published on CD-ROM with your documentation.

Creating a Detail Rule Report

Select *Detail Report* as the Report Type on the Rule Reports page.

The Detail Rule Report header lists information that is similar to the Summary Rules Report, plus the following:

Keywords	References the search keys for each rule that were set up on the Rule Keywords page that links from the Rule page.
Condition	References a syntax statement that expresses the condition for processing the rule. This information comes from the Rule page.
Results	References the rule details page link from the Rule page.

The detail lines of the report include the following (for Page Generation rules):

Panel title	References the title that is displayed at the top of the data entry page. This information comes from the Rule - Page Generation Page.
Sequence number	References the sequence number for each option. This information comes from the Page Generation page, Option Information tab.
Variable name	The name of the option for this row of the page. This information comes from the Page Generation page, Option Information tab.
Description	The description of the option. This information comes from the Page Label field on the Page Generation page, Option Information tab.
Print code	Designates which report(s) will include the option information. This information comes from the Page Generation page, Page Attributes tab.
Option definition	References the length, type (character or numeric), and decimal fields for the option on the Page Generation page, Option Attributes tab.
Default value	References the default value for the option from the Page Generation page, Default tab.
Validation	Indicates whether the option is required.
Value list	Indicates the value list field (if one is associated with the option) from the Page Generation page, Prompt tab.
Syntax	Indicates the dynamic value list syntax (if any) that is associated with the option.

For samples of this and other reports in your application, see the PDF files that are published on CD-ROM with your documentation.

Tree Report Page

Usage	Use the Tree Report page to create a report on a specific rule tree.
Object Name	RUN_CPS2000
Navigation	Define Business Rules, Maintain Product Configurator, Report, Tree Report, Tree Report
Access Requirements	Enter a Run Control ID.

Tree Report

Run Control ID: ADHOC [Report Manager](#) [Process Monitor](#)

Report Information

SetID:

Functional Area:

Tree:

Tree Report page

The **Run Control ID** you selected or entered to access this page is displayed.

Set ID Select the **Set ID** from the drop-down list of values.

Functional Area The functional area is either *Distribution* or *Production*.

Tree Select a tree from the trees on your system.

Tree Report

Description	Creates a report on a specific rule tree—either a Distribution tree or a Production tree.
Report ID	CPS2000
Type of Report	SQR
Parameters	SetID, Functional Area, and Tree
Source	CPS2000.SQR
Sorted By	Node and Sequence

The tree report headings for either a Distribution tree or a Production tree are:

SetID	The SetID established when you created the tree.
Area	References the functional area, either Distribution or Production. The area is designated when you create the tree.
Tree	The name of the rule tree from the Tree page.
Run Date	The date that the report ran.
Run Time	The time that the report ran.

The report displays the rules in the order that they process with detail:

Node number	Tree node from the Tree page.
Sequence number	Sequence within the node from the Tree page, General Information tab.
Rule number	Rule number from the Tree page, General Information tab.
Action code	Action code associated with the rule from the Rule page.
Description	Description of the tree sequence line from the Tree page, General Information tab.

For samples of this and other reports in your application, see the PDF files that are published on CD-ROM with your documentation.

Production Compare Report Page

Usage	<p>Use the Production Compare Report page to create a report that displays production information for configured sales orders that have been changed after a production ID has been created.</p> <p>To generate the production information for this report, a Production Request with a Request Type of <i>Change Production Request</i> must be submitted for an existing configured sale.</p>
Object Name	RUN_CPS3000
Navigation	Define Business Rules, Process Product Configurator, Report, Production Compare Report, Production Compare Report
Access Requirements	Enter a Run Control ID.

Production Compare Report - Production Compare Report page

The **Run Control ID** you selected or entered to access this page is displayed.

Business Unit Enter or select the business unit.

Order No Enter or select the order number. Only orders that have changes after a production ID was created will appear in the list.

Production Compare Report

Description	Creates a report that displays production information for configured sales orders and production IDs that have been changed after production is already in process. To generate the production information for this report, a Production Request with a Request Type of <i>Change Production Request</i> must be submitted for an existing configured sales order.
Report ID	CPS3000
Type of Report	SQR
Parameters	Business Unit and Order Number
Source	CPS3000.SQR
Sorted By	Business Unit, Order, and Line

A Production Compare Report header displays the following:

Business unit	Business unit.
Order number	Order number.
Run date	The date that the report ran.
Run time	The time that the report ran.

The Production Compare Report displays information from the production order:

Line	Line number on the sales order.
Original PID (original product ID)	Product ID of the original sales order.
New PID (new product ID)	New product ID from the changed sales order.
Header	Indicates that the information in this row is from the sales order header. The lines below reflect the new and the old production ID information. Comparing them shows you what changed.
Item	Sales order item.
Unit	Sales order business unit.
Quantity	Sales order quantity.
Prdn Area (production area)	Sales order production area.
Configuration Code	Sales order configuration code.

The Production Compare Report also shows the new and the old production ID information for the following fields. Comparing them shows you what changed.

Comp List	Component list.
Comp Seq	Component sequence.
Op Seq	Operation sequence.
Component ID	Component ID.
Qty Code	Quantity code.
Qty Per	Quantity per.
Yield	Yield.
Non-Owned?	Non-owned (<i>Yes</i> or <i>No</i>).
Configuration Code	Configuration code.
OP	Operation list.
Comp Seq	Component sequence.
Op Seq	Operation sequence.

For samples of this and other reports in your application, see the PDF files that are published on CD-ROM with your documentation.

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