



## Configurator Kits and Packages

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### Overview

Configurator is an extended module for SalesPad Desktop that makes it possible to create advanced configurations for items that need selections made on-the-fly for sales orders. This module already supported Manufacturing BOMs (aka MBOMs) and Distribution BOMs (aka DBOMs or Assembly BOMs), and now it also provides configuration types for GP kits and SalesPad packages.

For more information on configuring and using GP kits and SalesPad packages, please refer to [this documentation](#).

### Kit and Package Configuration Types

The Configuration Type dropdown now provides options for Kit and Package. The Configuration Type controls the other options that will be possible for this configuration, and it affects how the sales line is created when this configuration is added to a sales order.



Kit and package configurations both require the base Item Number to be an Item Master with a type of Kit. Attempting to select an item that is not configured as a GP kit will display an error message and prevent selecting that item.



Package configurations require the Item Master to be configured to automatically explode into a package when it is added to a sales order. This means that the item's Item Description must include the value set in the Package Indicator setting.



Some configuration options are not available for kit and package configurations. This includes the Dynamic Root Item tab, because the root item must match the GP kit item. This also includes the Manufacturing BOM tab, and other MBOM-related functionality for attribute options like Scrap Percentage and Backflush Item.



Both kit and package configurations will always include any base components that are configured on the GP kit item. If there are components that should always be included in a configuration regardless of the other selections made, then they can simply be set as the

base components for the Item Master.

### Kit Configurations

When a kit configuration is added to a sales order, a variant item is created from the base GP kit item. This variant item has its Item Number altered based on the selections made, and it is saved as a new Item Master in the system. If any of the selections correspond to items in the system, they are added as components for that new kit item variant.

This configuration type is recommended when one or more of the following applies:

- There are only a handful or dozens of different possible combinations for a given configuration.
- It is helpful or necessary to save the final combinations for later use.
- Users do not need to add, update, or delete individual component lines based on customer specifications or later changes, or they can manage that entirely by updating the selected combination within Configurator.

### Creation

In order to create a kit configuration, select the Item Number of a kit item in the system, and set the Configuration Type to Kit. All other instructions on [the base Configurator documentation](#) are still valid for kit configurations.

Below are screenshots needed to mimic the example used in this documentation.



### Usage

Add a new sales line to a sales document and type in the base Item Number for a package configuration. For this example, the base Item Number is PRINTER-BUNDLE. If configured correctly, the Sales Line Configurator plugin will automatically launch and show the options for this configuration.

Make selections for all required attributes and any desired optional attributes. The Unit Price and Extended Price will automatically calculate based on the selections made.



Click the Add & Close button to add this configuration to the sales document. Notice the Item Number has been modified to account for the selections made.



At any point, the Sales Line Configurator plugin can be relaunched to make further changes to this configuration. However, it is important to note that doing this will wipe out any manual changes that have been made to this sales line! The sales line will be deleted and re-created based on the updated selections. This can be a helpful way to start from scratch if a manual error is made.

## Generated Kit Items

Kit item variants are automatically created as new kit items in the system. The Item Number will match the sales line and provide visibility into the selections made. The Kit Components tab in the Inventory Lookup will show the kit component items that have been assigned to this variant, which will match the selections that are associated with items in the system.



### Package Configurations

When a package configuration is added to a sales order, the base GP kit item is exploded into a package, and then the selections that correspond to items in the system are added as components for that package. This does not modify the base GP kit item's components, and it does not create new GP kit variants in the system.

This configuration type is recommended when one or more of the following applies:

- There are 100s or 1000s of different possible combinations for a given configuration.
- It is not helpful or is not necessary to save the final combinations for later use.
- It is desired to avoid Item Master data bloat.
- Users need to add, update, or delete individual component lines based on customer specifications or later changes.

## Creation

In order to create a package configuration, select the Item Number of a kit item in the system, and set the Configuration Type to Package. All other instructions on [the base Configurator documentation](#) are still valid for package configurations.

Below are screenshots needed to mimic the example used in this documentation. Note that the Hardware attribute does not have any options, because it is a Check Box attribute.



## Price Rollup

There is a new Roll Up Price column that is available in the Attributes grid. This functionality allows configuring whether components should retain their individual prices, or roll their prices up into the top package line. This is only available for package configurations, because this is the only configuration that breaks out all of its components onto individual sales lines.

The configuration must have a Pricing Type of Configurator for the price rollup logic to be applied properly. Price rollup takes into account attribute-level pricing (Price in the Attributes grid) as well as option-level pricing (Price Per Qty in the Options grid).

## Usage

Add a new sales line to a sales document and type in the base Item Number for a package

configuration. For this example, the base Item Number is KIT-SHELVING. If configured correctly, the Sales Line Configurator plugin will automatically launch and show the options for this configuration.

Make selections for all required attributes and any desired optional attributes. The Unit Price and Extended Price will automatically calculate based on the selections made. Note that this takes into account all individual component prices.



Click the Add & Close button to add this configuration to the sales document. Notice the package indicator on the far left, with the red dot indicating the top package line, and the connected branches indicating that package's component lines.

The following screenshot shows what the lines would look like if all the components were configured to Roll Up Price. Note that the Margin % field does not calculate for top package lines.



The following screenshot shows what the lines would look like if all the components were not configured to Roll Up Price.



At this point, manual changes can be made to the sales lines, either directly or via the Package Editor sales line plugin. New components can be added to the package by inserting sales lines in the middle of the package.

At any point, the Sales Line Configurator plugin can be relaunched to make further changes to this configuration. However, it is important to note that doing this will wipe out any manual changes that have been made to this package! The entire package will be removed and re-created based on the new selections. This can be a helpful way to start from scratch if a manual error is made.

#### New Scripts

There are new script settings available to customize the validation and processing around kit and package configurations.



*New Configurator Kit Script* - A C# Script run on new kit items created through configurator, before the new item is first saved. Parameters: SalesPad.Bus.ItemMaster kit, SalesPad.Bus.ConfigRoot root, System.ComponentModel.CancelEventArgs e.

*New Configurator Package Script* - A C# Script run on Packages created through configurator, before the kit is exploded into a package. Parameters: SalesPad.Bus.ItemMaster kit, SalesPad.Bus.ConfigRoot root, System.ComponentModel.CancelEventArgs e.

*Configurator Post Package Explosion Script* - A C# Script that runs after a configurator

package is exploded into a package. Parameters: SalesPad.Bus.SalesDocument sd,  
SalesPad.Bus.SalesLineItem kitLine, SalesPad.Bus.SalesLineItems pkgCompLines,  
System.ComponentModel.CancelEventArgs e.