

Configuration tools

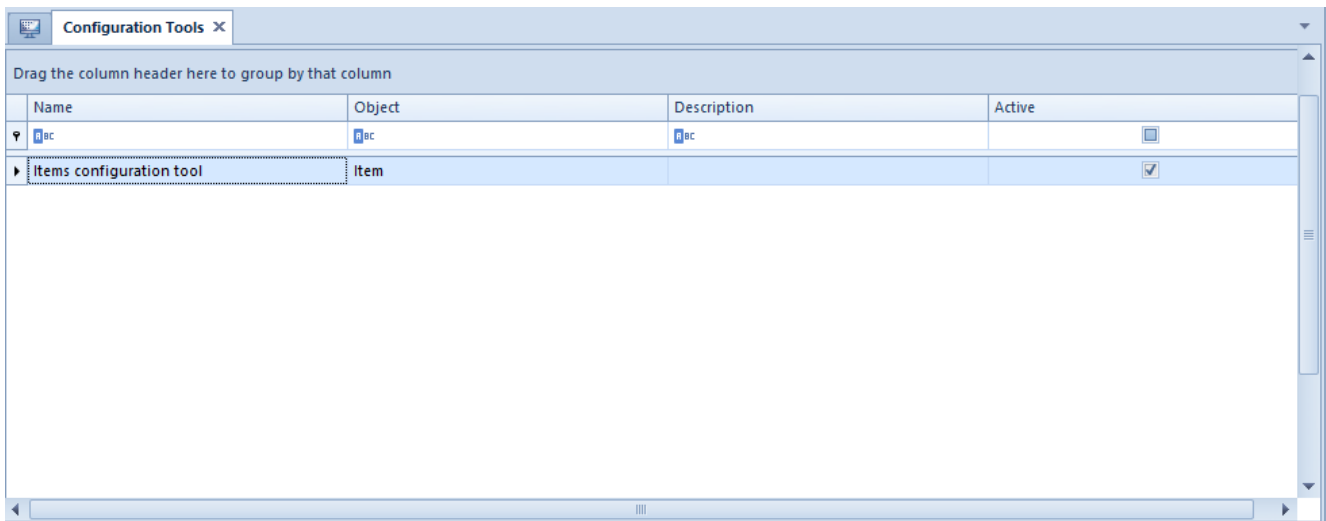
General information

The functionality of configuration tools allows for automatic generation of the following data:

- Codes and/or names for newly added items
- Codes for newly added customers/vendors
- Numbers for newly added vouchers
- Codes for newly added coupons

Thanks to configuration tools, a user can maintain nomenclature cohesion and coding present in the system.

The list of configuration tools is available from the level of *Configuration* → *General* → *Configuration Tools*.

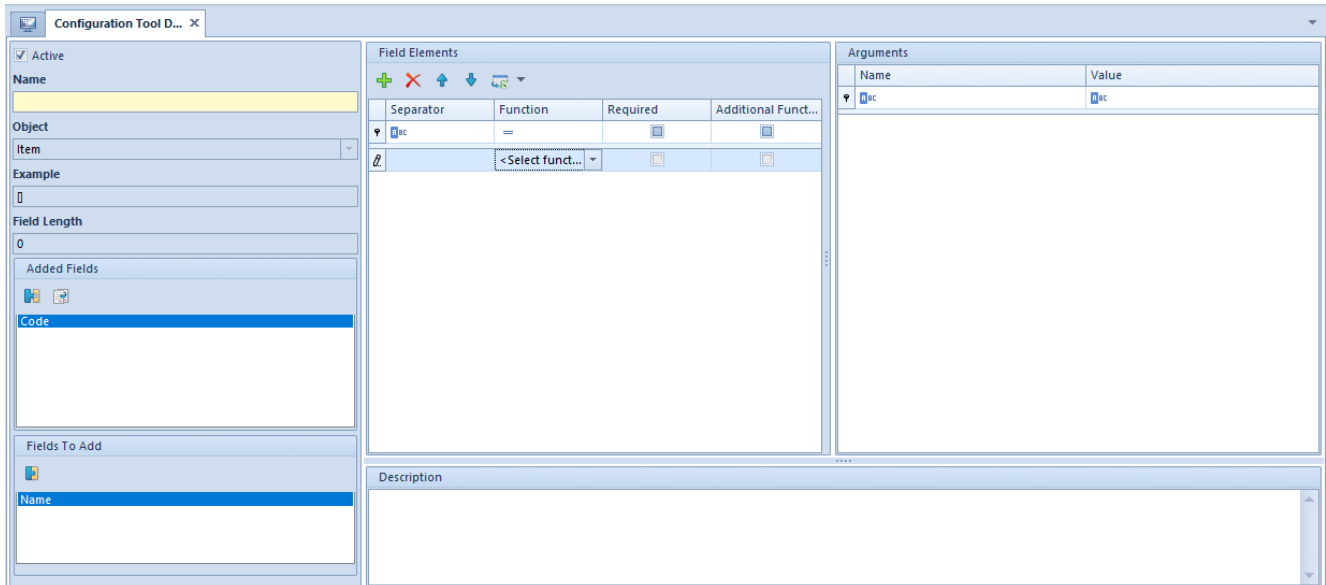


Drag the column header here to group by that column			
Name	Object	Description	Active
ec	ec	ec	<input type="checkbox"/>
Items configuration tool	Item		<input checked="" type="checkbox"/>

List of configuration tools

Defining a configuration tool

To add a new configuration tool, it is necessary to select [Add] button, which is available in the list of configuration tools.



New configuration tool form

Configuration tool header

The header of a configuration tool form contains the following fields and sections:

- **Parameter *Active*** – checked by default. Its deselection will make it impossible to use the configuration tool for generating object codes/names.
- **Name** – mandatory field
- **Object** – drop-down list of objects for which it will be possible to use the configuration tool:
 - Item
 - Customer/Vendor
 - Voucher
 - Discount Coupon

If the user selects the object Discount Coupon, the field will automatically be grayed out, regardless of the fact that the configuration tool has not been saved. In this case, a function *Document Series Code* is added. Only after this function is deleted can the user modify the field *Object* again.

- **Example** – presents the structure of a configuration tool, composed of subsequent elements composted in

section *Field Elements*

- **Field Length** – presents total of characters presented for the argument *Number of Characters* in *Arguments* section, for each field element
- **Added Fields** – fields to be defined with the use of the configuration tool, transferred from *Fields To Add* With the use of the [**Detach**] button, it is possible to move a given field back to the section *Fields To Add*.

Hint

The button [**Copy**], available in the *Added Fields* section, can be used during the creation of a configuration tool for *Item* object. It copies elements of an already added field and moves them to a field which is not added yet. This way, the user can move elements of the *Code* field to the *Name* field (such field will be added to the section *Added Fields*) and vice versa.

- **Fields To Add** – fields which can be defined with the use of a configuration tool. With the use of the [**Attach**] button, it is possible to move a given field back to the section *Added Fields*.

Section *Field Elements*

In *Field Elements* section, the user can define components of a field selected in the *Added Fields* section. Depending on configuration tool object, it is possible to use different functions to define field elements.

A subsequent element of configuration tool can be added/deleted with the use of the buttons [**Add**]/[**Delete**], whereas the order of elements in the configuration tool are set with the help of the [**Up**]/[**Down**] arrows.

Section *Field Elements* contains the following columns:

- **Separator** – allows for entering a character which separates subsequent segments of defined code, name or

number. In the case of empty character, the next element specified with given function is added to the previous one.

- **Function** – allows for selecting from a drop-down list an expression which must be included in defined code, name or number. Codes, names and numbers of an object which are created with the use of a configuration tool, can be created by using various functions that refer to fields existing in the system. Depending on a configuration tool object and field type, the following functions are available:

- Attachment
- Attribute
- Brand
- Center
- CN Code
- Customer
- Discount coupon
- Document series code
- Group
- Manufacturer
- Mask
- Name
- Price
- SKU
- Subsequent Number
- Voucher Sort Series
- Warehouse

Each function must be described with a set of arguments available in section *Arguments*. Depending on the selected function, there will be miscellaneous data displayed, which must be defined. Detailed description can be found in chapter <<*Arguments*>>

- **Required** – column displayed for *Item* and *Customer/Vendor*
Selecting this parameter means that it will not be

possible to save customer/vendor or item form if no value is provided for this field element

- **Additional Function** – column displayed for *Item* and *Customer/Vendor* If the parameter is selected, it means that a function will not be included in the code or name of a customer/vendor or item. For instance, the function *Price* is an additional function which purpose is to add an item to a price list during new item generation. Another example is the function *Attachment* which purpose is to add an attachment during new item generation

Section Arguments

The content of *Arguments* section depends on the function selected in section *Field Elements*. Below are the following arguments which can be defined:

- **Field** – this argument is used for functions that refer to other objects than customer/vendor or item form. The argument indicates from which field of the associated object a value should be taken to create a code/name.

Example

The user wants a part of a code/name to depend on a manufacturer indicated on an item form. To do so, it is necessary to add the field element *Manufacturer* to the item form and defines *Field* argument, which allows to specify whether the name of a manufacturer should be retrieved from field *Code*, *Name*, *Description* or *Attribute*.

- **Attribute Name** – this argument enables to indicate which attribute would be considered in the configuration tool
- **Level** – this argument is connected with the function *Group*. It enables to mark an item group from which values will be included in the configuration tool
- **Number of Characters** – this argument enables to indicate the length of a given customer/vendor/item code segment
- **From Character** – this character enables to indicate from

which character a value should be taken to a code segment. Values are very often entered in given fields in accordance with a certain pattern, in which part of the value is common for many objects and only its further part differentiates a given object

- **Completion of Missing Characters** – parts of a code can be supplemented with additional characters in order to maintain a uniform code structure. The argument can be used when a value on the field indicated in the configuration tool has smaller number of characters than an argument value *Number of Characters* and a code length should be maintained
- **Completion Sign** – this argument enables to indicate with which value a code part should be entered in the case when completion of missing characters was set for this function
- **Price List** – argument used for *Price Allows* for indicating a price list from which the price making part of the code should be retrieved/
- **Currency** – argument used for *Price Allows* for indicating a currency whose sign will make part of the code
- **Price Type** – argument used for *Price Allows* for indicating the type of price (subtotal or total) whose sign will make part of the code
- **Available at Batch Addition** – this argument indicates whether given function must be available in the matrix for batch addition
- **Values Attached at Batch Addition** – this argument is dedicated for these functions which refer to objects that have a list of values and which are available at batch addition. This argument will decide if only default value or the full list of values will be displayed after activating the option of batch addition in the filter of a given function. An example of the function for which this argument can be applied is *Brand*
- **Default Value** – this argument allows for specifying default value for selected function. It is mandatory for

the function with checked parameter *Available at Batch Addition*

- **Number of Characters** – this argument enables to define the number of digits that the *Subsequent number* function should contain
- **Start Number** – allows for indicating the value with which numbering of records should start. This argument is important This argument is very important when combined with the *argument Numbering Unique Codes*.
- **Numbering Unique Records** – allows for determining whether in case of using *Subsequent Number* function only duplicated values should be numbered or unique values too

Example

The user does not want to number unique records, but wants the first duplicated record to be marked with number 2, so checks the parameter *Numbering Unique Records* and defines *Start Number* as 2. With a configuration tool defined this way, the records can look in the following ways:

- **BD-12345678-1134-370** – first record
 - **BD-12345678-1134-370-002** – duplicated record
-
- **Code Format** – this argument enables defining of a regular expression. The function id constructed according to RegEx syntax, similarly as <<code format in definition of item group or customer/vendor group>>. In case of random characters, the following sets can be used:
 - [A-Z]
 - [a-z]
 - [0-9]

Example

Code format in the following form: [a-e]{3}[0-1] will generate string of characters composed of 4 elements. The first three

of them will be selected from set {a, b, c, d, e}, while the last one will be selected from set {0, 1}.

Note

The following expressions are not supported:

- Expressions containing special characters
 - \d
 - \w
 - \s
 - *
 - +
 - {n,}
-
- **Language** – argument used for functions whose values can be saved in different languages

Examples of using

configuration tools

Below, exemplary situations in which it is possible to use configuration tools in order to maintain nomenclature cohesion of objects present in the system, are described.

Example

In CA Clothes&Beauty company customer/vendor must have information about country prefix and subsequent number on the list included in its code.

First, it is necessary to determine country prefix as a value of attribute assigned to center in which a given customer/vendor is added to the system. In order to do so, the following data is entered by a user. To do so, the user [adds attribute](#) *Prefix* of *List* type with the following values: FRA, POL and GER. Then, [assigns the attribute to the object](#) *Company Structure Center* and assigns appropriate attribute values to particular company structure centers.

Then, the user adds a new configuration tool for *Customer/Vendor* object with attached field *Code* and the following functions selected:

- **Center** – this function must retrieve 3 characters of country prefix and therefore, in the function arguments, the following options are defined for it:
 - *Field – Attribute*
 - *Attribute Name – Prefix*
 - *Number of characters – 3*
 - *From Character – 0*
- **Subsequent Number** – this function must provide subsequent number of a customer/vendor and therefore, in the function arguments, the following options are defined for it:
 - *No Separator*
 - *Number of Digit –10*

- *Start Number* – 1
- *Numbering of Unique Codes* – selected

Next, the saved item configuration tool must be attached to customer/vendor group pattern. In order to do so, option *Configuration Tool* must be selected instead of *Code Format* next to *Code* field and appropriate configuration tool must be selected from the list.

When adding a new customer/vendor from the level of center *Trade Department (POL)*, the customer/vendor code will be automatically filled in with default values according to the defined configuration tool functions: *POL0000000001*.

Adding a subsequent customer/vendor from the level of center *Trade Department (FRA)* will automatically fill in its code with values: *FRA0000000001*.

Example

In CA Clothes&Beauty company code of each item included in item group *Clothing* must include information about item manufacturer, its brand, CN code and year of manufacturing, as well as have an image assigned.

Before adding a configuration tool, the user has to:

- Add values g., ABC, DEF, GHI in *Item Brands* [generic directory](#)
- Define <<CN codes>>, g., 85299092, 85299094
- Add attribute *Year of Manufacturing* of *List* type with values, g., 2014, 2015, 2016 and attach it to object *Item*
- **Manufacturer** – this function must retrieve only first four characters from manufacturer code and therefore, the following options are defined for it:
 - *Default value* – COMARCH
 - *Number of characters* – 4

- *From Character – 0*
- **CN Code** – this function must retrieve two characters of CN code, starting from 6. sign of a code and therefore, the following options are defined for it:
 - *Field – CN Code*
 - *Default value – 85299092*
 - *Number of Characters –2*
 - *From Character – 6*
- **Brand** – this function must retrieve four characters from brand values, whereas in case of a shorter expression, it must replace the first character with an underline “_” and therefore, the following options are defined for the function:
 - *Field – Value*
 - *Default value – ABC*
 - *Number of Characters – 4*
 - *From Character – 0*
 - *Completion Sign – “_”*
 - *Completion of Missing Characters – Prefix*
- **Attribute** – this function must retrieve *Year of Manufacturing* attribute and therefore, the following options are defined for it:
 - *Attribute Name – Year of Manufacturing*
 - *Default Value – 2016*
 - *Number of Characters – 4*
 - *From character – 0*
- **Attachment** – this is an additional function which must automatically add a specific image to a new item and therefore, the following options are defined for it:
 - *Default value – any attachment added in Comarch ERP Standard system*

Next, the saved item configuration tool must be attached to *Clothing* item group. In order to do so, option *Configuration Tool* must be selected instead of *Code Format* next to *Code* field and appropriate configuration tool must be selected from the list.

When adding a new item to *Clothing* item group, code/name of the item will be automatically filled in with default values according to the defined configuration tool functions: *COMA92_ABC2016*. Moreover, that item will have attribute *Year of Manufacturing* with value *2016* attached in tab *Attributes* as well as a selected image added in tab *Attachments*.

Changing manufacturer, CN code, brand or attribute values on the form will update relevant value in item code/name.

