

## **CPQ Unique Item Generator**

Developed by ISE to enhance the CPQ to XA interface

In the interface between the CPQ Configurator and XA, the normal process flow involves the creation of a new XA EPDM Item Process record linked to the configured item for each unique configuration. Every configured line item on a Quote or Customer Order ends up consisting of a new Item Process that references the Bill of Material and Routing generated by the user's answers to the questionnaire in CPQ Configurator.

The needs of some XA customers, however, are not satisfied with the generation of a new Item Process for a configured item. Rather, some XA customers require that a new unique item number be generated for each unique configuration. ISE's "CPQ Unique item Generator" application was designed to meet the needs of XA customers with this requirement.

ISE's "CPQ Unique Item Generator" application loops through all the line item records on a Customer Order, replacing each line item containing a configured Item Process with a line item containing a unique item number. These new unique items will retain all the characteristics of the original configured Item Process and will be fully functional items in XA – with all required underlying EPDM, MM and CSM records automatically created. The item numbering scheme for the new unique items is flexible and can be set up to accommodate your company's needs.

### ***XA SYSTEM REQUIREMENTS***

- System-Link
- Integrator (Enterprise Integrator preferred)

### ***ISE UNIQUE ITEM GENERATION APPLICATION: Functionality Overview***

- Replaces Configured Line Items in XA Customer Orders and Quotes with Line Items containing a unique Non-configured item.
- The unique Non-configured items will be similar to the Configured items they replace, using the same Bill of Material & Routing generated by the CPQ Configuration process.
- Contains multiple options to tailor the application – these options exist at the application level, the XA Site level, and XA Product level.

### ***APPLICATION-LEVEL CONTROL: 2 Modes to Run the Application***

1. Automatic ("End Order") Mode: Can be set whenever a Customer Order or Quote is created or maintained, as long as either contains at least one Configured line item and the "End Order Processing" option has been checked.
2. IDF Level 2 "User Action" Mode: Set to require users to select a "Mass Action" option from a custom "User" menu after the order has been created or updated. This menu option exists on the "Line Items" list view screen showing the line items for a Customer Order or Quote. And on the card file screen showing the details for a Customer Order or Quote line item. (\*This "IDF Level 2 User Action" mode is always available if needed.)