

## ***CDC Salesforce - Part Selector User Guide***

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# 1. CONFIGURING PART SELECTOR

User is navigated to **Product Configuration** tab which has the following sections

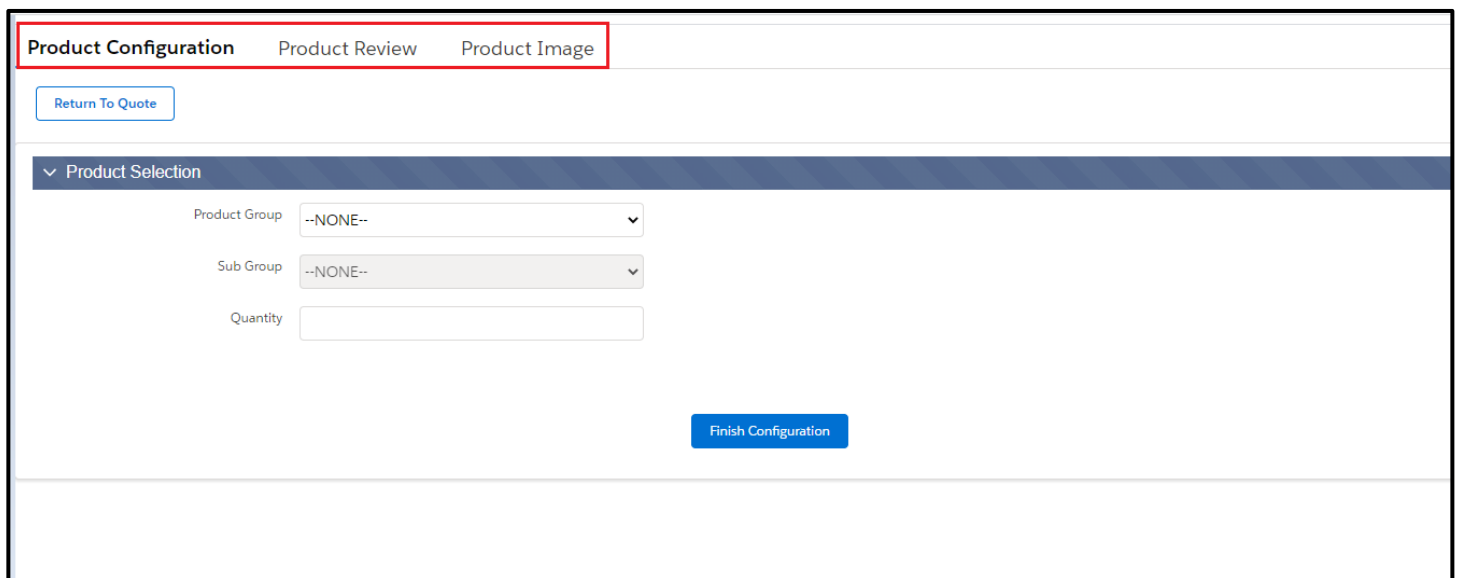
- Product Selection
- Product Specific Attributes (Visible only after selecting Product Group and Sub Group)

The sections can be expanded and collapsed by clicking on the arrow beside every section header



The screenshot shows the 'Product Configuration' tab selected in a header bar. Below the header, there is a 'Return To Quote' button. Two section headers are visible: 'Product Selection' and 'Product-Specific Attributes', both with right-pointing chevron arrows indicating they are collapsed. A 'Finish Configuration' button is located at the bottom right of the main content area.

The **Return to Quote** button navigates the user to Quote details screen



This screenshot shows the 'Product Configuration' tab with the 'Product Selection' section expanded, indicated by a downward-pointing chevron. The expanded section contains three input fields: 'Product Group' and 'Sub Group' are dropdown menus both showing '--NONE--', and 'Quantity' is a text input field. The 'Return To Quote' and 'Finish Configuration' buttons are also visible in their respective positions.

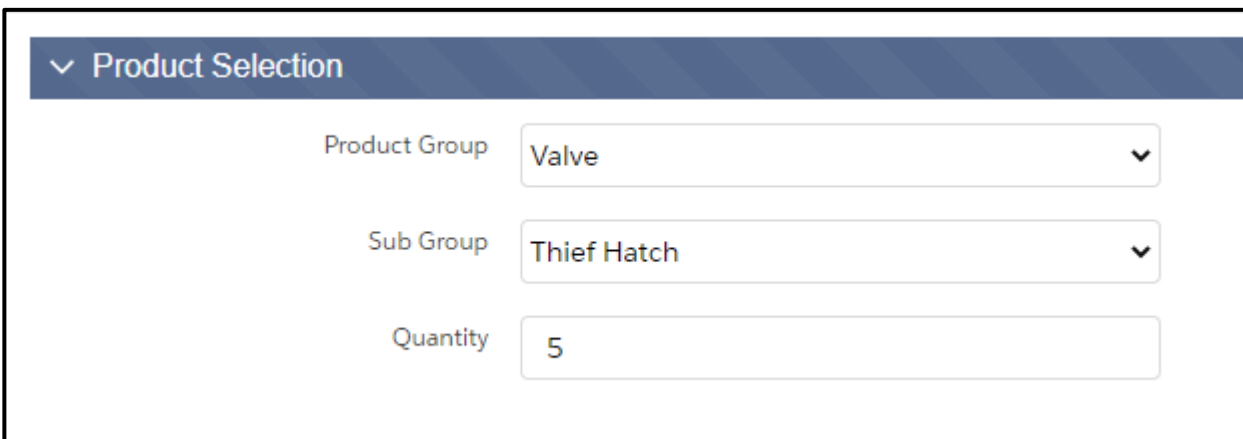
## 1.1 Product Selection

### ➤ Configuration by Product Group and Sub Group

1. Select a value in **Product Group** (other than 'Enter Part Number')
2. Enter the required **Sub Group** and **Quantity**

The values in the **Product Group** field are dependent on the **Brand** selected in the Opportunity

The values in **Sub Group** field are dependent on the value selected in **Product Group** field



The screenshot shows a form titled "Product Selection" with a dropdown arrow. Below the title, there are three fields: "Product Group" with a dropdown menu showing "Valve", "Sub Group" with a dropdown menu showing "Thief Hatch", and "Quantity" with a text input field containing the number "5".

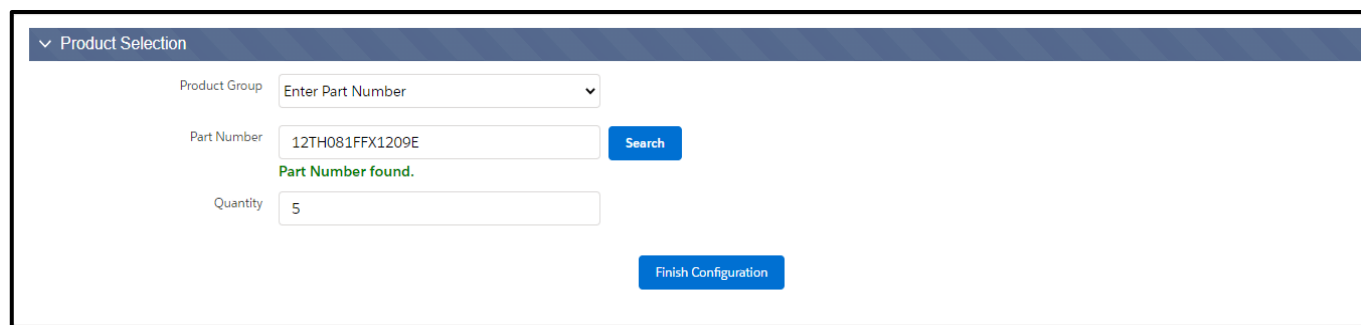
As soon as a value is selected in the **Product Group** field, the section **Product Specific Attributes** is exposed  
The Finish Configuration button is shifted to the **Product Specific Attributes** section

#### ➤ **Configuration by Part Number**

*The option 'Enter Part Number' is available in Product Group drop down irrespective of the Brand selected*

1. Select 'Enter Part Number' in **Product Group** field
2. Enter the value in **Part Number** field
3. Click on **Search** button

A message is displayed below Part Number field if the part number is found or not



The screenshot shows the "Product Selection" form with the "Product Group" dropdown set to "Enter Part Number". Below it, the "Part Number" field contains the text "12TH081FFX1209E". To the right of the "Part Number" field is a blue "Search" button. Below the "Part Number" field, the text "Part Number found." is displayed in green. Below the "Part Number" field and "Search" button is a "Quantity" field containing the number "5". At the bottom of the form is a blue "Finish Configuration" button.

An error message is displayed below the Part number field for invalid part number or if part number is not available for defined Brand

Product Selection

Product Group

Enter Part Number

Part Number

SC11330A0002

Search

Quantity

5

Part Number not found for the selected Brand.

Finish Configuration

- Enter the **Quantity** and click on **Finish Configuration** button to complete the configuration

User is re-directed to Product Review tab

*Note that **Product Specific Attributes** section is not available when 'Enter Part Number' is selected in **Product Group** field*

## 1.2 Product- Specific Attributes

This section is not available in the beginning when Quote Line is created. It is exposed immediately when a value is selected in **Sub Group** field

The fields in this section and the drop down values are dependent on the combination of **Product Group** and **Sub Group** selected in **Product Selection** section

Based on the combination, if there is only one value returning in a specific field, the value is defaulted, and the field is read only

- Enter the required values in all the fields in this section
- Click on **Finish Configuration** button to complete the configuration

Product-Specific Attributes

Model:

Thief Hatch

Size:

8"

Connection:

API 12

Body Material:

Aluminum

Envelope Gasket Material:

Fluorosilicone

Vacuum Diaphragm Material:

Fluorosilicone

Spring Material:

Inconel(R) X-750

Pressure Setting:

12 osig

Vacuum Setting:

0.9 osig

Option:

Polyester/PTFE Coating

Finish Configuration

When a user tries to click on other output tabs (Product Review) before finishing the configuration, an error message is displayed indicating to complete the configuration

Product Configuration

Product Review

Product Image

Return To Quote

Please complete your changes by clicking Finish Configuration before leaving the page

OK

Product Selection

Product Group

Valve

Sub Group

Thief Hatch

Quantity

Product-Specific Attributes

Model

Thief Hatch

Size

8"

Connection

API 12

Body Material

Aluminum

Envelope Gasket Material

--- Select ---

Vacuum Diaphragm Material

--- Select ---

User is re-directed to **Product Review** tab once all the details are entered and **Finish Configuration** button is clicked

Product Configuration

Product Review

Product Image

Return To Quote

List Price Each (USD)

PRICING ELEMENT	LIST PRICE EACH (USD)
Price List Each	\$1016.00
Discountable Lot Charge	\$0.00
Non-Discountable Lot Charge	\$0.00

Lead-time (Working Days)

LT 10	LT 20	LT 30	LT 40
5	7777	7777	7777

Product Description

Model: 12-TH-08-1FFX-12-09-E  
Groth Thief Hatch  
Size: 8" FF  
Flange Drilling: API 12

## 2. EDITING A CONFIGURED PRODUCT

1. Click on **Product Configuration** tab and observe the following:
  - a. The screen becomes **read-only**
  - b. The read-only screen has no **Finish Configuration** button
  - c. The **Return to Quote** button is visible on the top left
  - d. **Edit** button is visible button on the top right of the screen

The screenshot shows the 'Product Configuration' tab selected. At the top, there are three tabs: 'Product Configuration', 'Product Review', and 'Product Image'. Below the tabs, there is a 'Return To Quote' button on the left and an 'Edit' button on the right. The main content area is divided into two sections: 'Product Selection' and 'Product-Specific Attributes'. The 'Product Selection' section includes dropdowns for 'Product Group' (Valve), 'Sub Group' (Thief Hatch), and a 'Quantity' field (5). The 'Product-Specific Attributes' section includes dropdowns for 'Model' (Thief Hatch), 'Connection' (API 12), 'Envelope Gasket Material' (Fluorosilicone), 'Spring Material' (Inconel(R) X-750), 'Vacuum Setting' (0.9 osig), 'Size' (8"), 'Body Material' (Aluminum), 'Vacuum Diaphragm Material' (Fluorosilicone), 'Pressure Setting' (12 osig), and 'Option' (Polyester/PTFE Coating).

2. Clicking on **Edit** button allows -
  - a. View the values the user has already configured
  - b. The user to edit the product
- a. View the values the user has already configured
  - i. A PDF document appears in a pop-up window which contains all the configured details of Quote Line
  - ii. The header of the pop-up PDF page shows the quote line number, user's name, and user's current date, time, and time zone
  - iii. The pop-up PDF page contains all data-entry fields on the Product Configuration tab and their currently set values. Values are as displayed to the user

ConfigPartSelectorReference
1 / 1

Part Selector Input Values For Quote Line QL-0009973  
Generated by Nikhil Arpally at 10/23/2020 3:25 AM [America/El\_Salvador]

**Product Selection**  
ProductGroup : Valve  
Sub-Group : Thief Hatch  
Quantity : 5

**Product-Specific Attributes**  
Model: : Thief Hatch  
Size: : 8"  
Connection: : API 12  
Body Material: : Aluminum  
Envelope Gasket Material: : Fluorosilicone  
Vacuum Diaphragm Material: : Fluorosilicone  
Spring Material: : Inconel(R) X-750  
Pressure Setting: : 12 osig  
Vacuum Setting: : 0.9 osig  
Option: : Polyester/PTFE Coating

b. Edit the product

- The screen becomes editable
- Cancel button is visible button on the top right of the screen
- Finish Configuration button re-appear to allow user to make changes and reconfigure the product
- The **Return to Quote** button leads the user to Quote details page
- Clicking on Cancel button changes the screen to non-editable mode



Product Configuration

Product Review

Product Image

Return To Quote

Edit

Product Selection

Product Group

Valve

Sub Group

Thief Hatch

Quantity

5

Product-Specific Attributes

Model:

Thief Hatch

Size:

8"

Connection:

API 12

Body Material:

Aluminum

Envelope Gasket Material:

Fluorosilicone

Vacuum Diaphragm Material:

Fluorosilicone

Spring Material:

Inconel(R) X-750

Pressure Setting:

12 osig

Vacuum Setting:


0.9 osig

Option:

Polyester/PTFE Coating

User will be able to edit configuration based on the Quote Status and Product Configuration Status (Quote line). Below is the matrix which depicts at what stage can a user edit a configuration.

Quote Status		Pending Pending Approvals Partner Submitted Change Order			Approved Order Submitted Cancel Blocked Unblock	Rejected		
		Incomplete	Complete No Overrides	Complete with Override(s)	(All)	Incomplete	Complete No Overrides	Complete with Override(s)
Business Users	Inside Sales User	Editable (Edit view by default)	Editable (Read only view until Edit button clicked)	Read Only	Read Only	Editable (Edit view by default)	Editable (Read only view until Edit button clicked)	Read Only
	Engineering User	Editable (Edit view by default)	Editable (Read only view until Edit button clicked)	Editable (Read only until Edit button clicked)	Read Only	Editable (Edit view by default)	Editable (Read only view until Edit button clicked)	Editable (Read only until Edit button clicked)

- Click on **Return to Quote** button
- Click on **Quote Line Items** tab
- Click on down arrow next to the  icon for the configured line item to view a list of options

Quote  
**Q-02061**

Add Quote Line
Create New Charge
Submit For Approval

Related
Details
**Quote Line Items**
Integration Log

Action	Line Name	Quantity	Product Name	Customer Currency	Total List Price (Cust. Curr)	Discount. (%)	Discount Amount	Net Price Each (Cust Curr)	Ext Net Price (Cust
<div> <div> </div> <div> QL-0009973 5 Part Selector USD 1016 0.0% \$0.00 1016 5080 </div> <div> <div>Configure 1</div> <div>Output 2</div> <div>Technical Assistance 3</div> <div>Production Planning 4</div> <div>Pricing &amp; Commissions 5</div> <div>Order Entry 6</div> <div>Update Status 7</div> </div> </div>									

1. Configure – Click here to navigate to Configuration page
2. Output – Click here to navigate to the Product Review tab
3. Technical Assistance – Click here to navigate to Technical Assistance screen which allows the user to request for technical review
4. Production Planning – Click here to update the review comments
5. Pricing and Commissions- Click here view the pricing, commissions and update the costs
6. Order Entry – Click here to update the standard Delivery Date, Planned Delivery Date and Wanted Delivery Date
7. Update Status – Click here to update the status of the Quote line

## 3. OUTPUTS

Visibility of tabs is controlled by roles. When Inside Sales User logs in only three of the tabs are visible:

- a. Product Configuration
- b. Product Review
- c. Product Image

### 3.1 Product Review Tab

1. Click on **Product Review** tab

The Product Review tab will summarize the **List Price Each (USD)**, **Lead Time (Working Days)**, and **Product Description** information in three individual sections.

- Pricing will be broken down by pricing element

- Lead times broken down by site

- Product description will be composed of the individual descriptions for elements of the product structure

Product Configuration

Product Review

Product Image

☐

Return To Quote

▼ List Price Each (USD)

PRICING ELEMENT	LIST PRICE EACH (USD)
Price List Each	\$1016.00
Discountable Lot Charge	\$0.00
Non-Discountable Lot Charge	\$0.00

▼ Lead-time (Working Days)

LT 10	LT 20	LT 30	LT 40
5	7777	7777	7777

▼ Product Description

Model: 12-TH-08-1FFX-12-09-E

Groth Thief Hatch

Size: 8" FF

When Engineer User logs in following tabs are visible:

- a. Product Configuration
- b. Product Review
- c. Product Image
- d. Pricing, LT & Cost
- e. Engineering Specials
- f. Manufacturing Outputs
- g. Troubleshooting

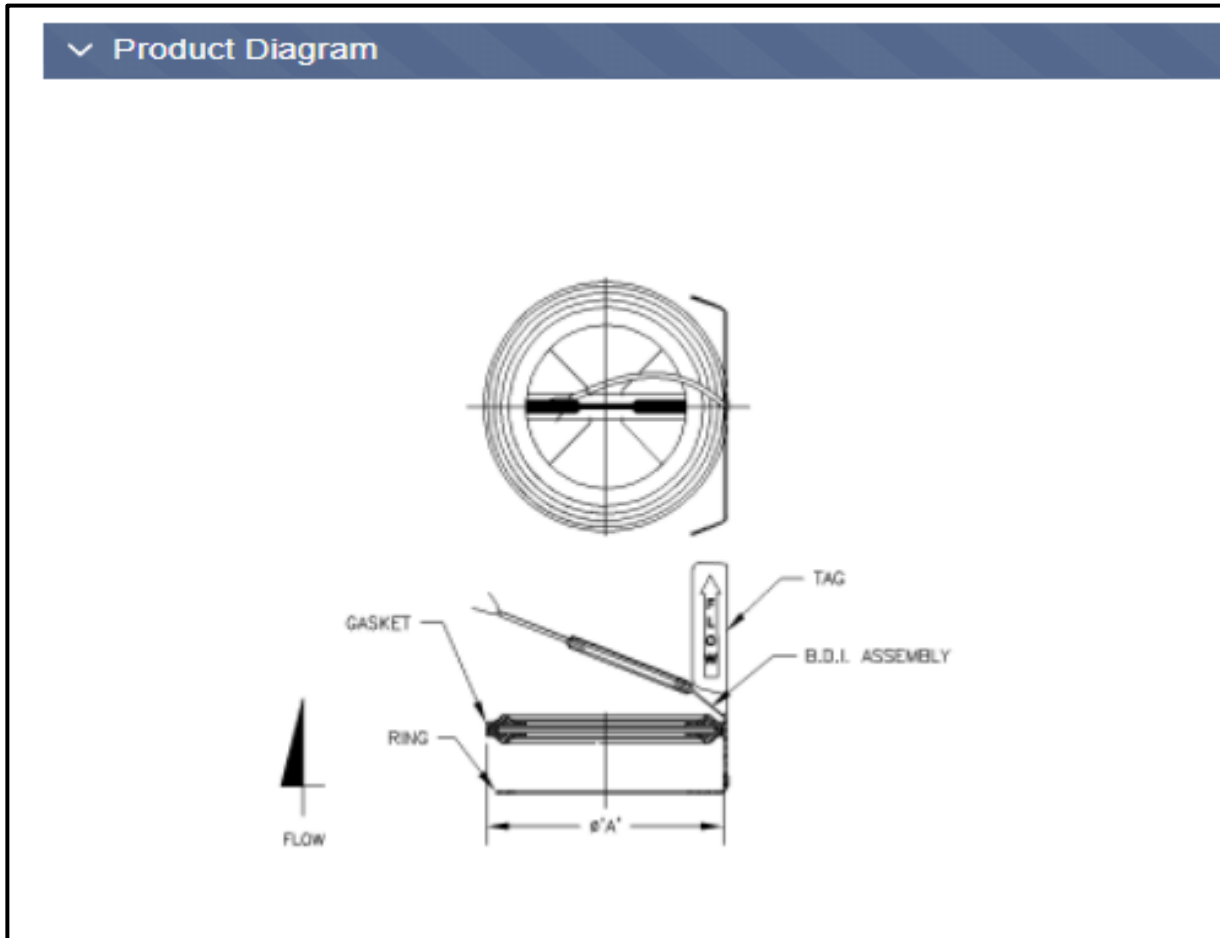
### 3.2 Product Image Tab

#### 1. Click on **Product Image** tab

The Product Image tab will display the Product Diagram and Diagram Info in two individual sections

#### 3.2.1 Product Diagram

This section displays a static diagram (if available for that product).



#### 3.2.2 Diagram Info

**Diagram Info** section has **Drawing ID** and **DimA**, **DimB**, etc., and the following checkboxes:

- **Change made to a configurator drawing**  
Checking this enables user to override the existing diagram with a user preferred diagram. User need to enter the diagram code on right hand side text field
- **Drawing to be created outside of Config**  
Checking this checkbox makes the diagram disappear from the **Product Diagram** section.

The diagram present in the Diagram info section gets updated when the **Drawing ID** is changed

Diagram Info

Change made to a configurator drawing ☐

Drawing to be created outside of Config ☐

DrawingID	<input type="text" value="2091"/>	<input type="text"/>
DImA	<input type="text"/>	<input type="text"/>
DImB	<input type="text"/>	<input type="text"/>
DImC	<input type="text"/>	<input type="text"/>
DImD	<input type="text"/>	<input type="text"/>
DImE	<input type="text"/>	<input type="text"/>
DImF	<input type="text"/>	<input type="text"/>

Save