

Version 8 (8.00.0032 – 7.13.2018)

Web Configurator

- Save Button Behavior – From Settings/Toolbar, set the Save Button Behavior to:
 - Default – saves and remains in current configuration.
 - Home- saves and goes to configurator home screen (line item/items already configured screen)
 - Close – removes save and only Save and Close remains.
- Save and Duplicate – From Settings/Toolbar, enable Show Save and Duplicate Button to save configuration and immediately edit a duplicate configuration.

Dynamics CRM

- CRM Team Membership Function – Utilize CRMISUSERINTEAM() from CRM Functions to determine if current user is in specified Dynamics CRM team.

Version 8 (8.00.0031 - 5.25.2018)

Web Configurator

- Object Links – enable a small link (URL) menu bar to be associated with each Option in a Category. They may be applied to a Category or to distinct Options. Object Links are defined and applied in Assignments.
- Model Variant: Create from XML – Utilizing Experlogix configuration XML, a model variant may be created utilizing the standard options from previous configuration.

Dynamics CRM

- Configuration Import – From the web configurator, locate and import of previously configured Dynamics CRM opportunity, quote, and order configurations. Enable Configuration Import in site Settings/Enable Import Configuration.

Version 8 (8.00.0030 - 4.11.2018)

Configurator & Design Center Settings and Performance Enhancements - This version of Experlogix included updates including:

- Target Site Maintenance Management
- Diagnostic rule information from Web Configurator Service
- JavaScript updates for resetting categories and properties
- Improved publish times for databases utilizing Category Extension Queries and Rule Flags

Version 8 (8.00.0029 - 3.7.2018)

Web Configurator

- Invariant Date / Time Support – added support for date and time values that do not vary based on the user's time zone.
- Auto-Focus Category – added support for automatically navigating to and presenting a specified category, optionally displaying the category's Picker (if applicable).

Design Center

- Formula Selective Publish – From the Design Center, Formulas may be selectively published in order to update the configurator without the need to publish all data.
- Override to List – added support for designating a List to display when overriding calculated properties.
- Category Overview – added support for presenting a customizable splash screen for categories and super-categories.

AX

- Experlogix Model for Dynamics 365 for Operations updated to be 100% extension-based.

NetSuite

- Support added for NetSuite 2018.1.

Version 8 (8.00.0028 – 1.17.2018)

Web Configurator

- Search Panel – clicking the search icon opens the search panel, enabling the search of Series, Models, Categories, Options and Properties. The search icon and panel is enabled by default and may be disabled from the Publishing Toolkit/Settings/Action Presets.
- Undo – enables the ability to undo up to 20 configuration steps during the product configuration process. The configurator undo button is enabled by setting the number of undo steps from the Publishing Toolkit/Settings/CPQ/Maximum Undo History Size.
- New Experlogix Default Quick View – added quick view that will displays both single and nested configurations as required. Transform: experlogix_quickview.xsl

Design Center

- AvaTaxLineAmount – added to built-in functions. Returns the tax amount based on supplied line information.
- AvaTaxLineAmountif – added to built-in functions. If a condition is TRUE, returns the tax amount based on supplied line information.

Settings

- Auto Collapse Previous Group – within the category bar navigation, this setting allows only one category tree to be open at a time.
- Show Status Bar – enable/disable the Series Status Bar for popout Categories.

AX

- Support added for AX 2009

NAV

- Support added for NAV 2018

GP

- Support added for GP 2018

Version 8 (8.00.0027 – 12.12.2017)

Design Center

- Web UI Template Manager – redesigned with multi-select template assignment and it is no longer modal, enabling Design Center access when open.
- AvaTax Function – added AvaTaxLineAmount function with settings to specify the Avalara connection information.

AX

- Support added for AX 2012 CU10, CU11, and CU13.

NetSuite

- Added the ability to publish via the command line to Direct Publish and Publishing Service sites.

Salesforce

- Added the ability to publish via the command line to Direct Publish and Publishing Service sites.

Version 8 (8.00.0026 – 11.2.2017)

Design Center & Web Configurator

- Slider Control – added Ability to represent Range and List properties as slider control
- Child Config Save – added support to save a child configuration from a child config window
- Property Validation – added support for regular expression-based property validation
- Child Config Controls – added support for the dynamic display and enabling of child config controls
- Line Breaks – added *preserveLineBreaks* setting to ListPicker.config and OptionPicker.config, allowing line breaks in picker windows
- PDF Upload – added support for uploading PDF files via publisher
- Design Center Sorting – all grids and tree controls in the Design Center are now updated to sort by *SeqNo* where applicable

CRM

- Support for Dynamics 365 for Sales CRM 9.0

AX

- Performance Optimizations by adding caching for part/dimension lookups

Azure SQL

- Support added for Azure SQL

Version 8 (8.00.0025 – 9.28.2017)

Design Center

- Quick Action Bar – a new toolbar for the top of the CPQ site where quick links can be added
- Added Dynamics 365 UI theme for CPQ site.
- Series Compiler Optimizations – dramatically reduced the amount of time for publishing
- Added tooltips for formula and query details in the Design Center Category/Properties grid

AX

- Added support for Dynamics 365 for Operations CU9.

NAV

- Added support for compressing configuration XML on save in Website Settings.

NetSuite

- Added support for NetSuite 2017.2

Version 8 (8.00.0024 – 8.23.2017)

Design Center

- Series/Model and SalesCode Ranges – added support for S-level and M-level property ranges in Property Defaults.

CRM

- Auto-Config – the ability to configure a new entity record when launched from another. For example, configuring a new quote when launched from an opportunity.

AX

- Added support for Dynamics 365 for Operations CU9.

NAV

- Added support for compressing configuration XML on save in Website Settings.

NetSuite

- Added support for NetSuite 2017.2

Version 8 (8.00.0023 – 7.31.2017)

Design Center

- Property Based BOM Transform Properties – dynamically restructure BOM node hierarchy utilizing new properties ERP_BOMAssy, ERP_BOMGroup, ERP_BOMConfigNo, ERP_BOMCategory.
- List Picker Color/Image Support – utilizing a custom listpicker.config, the format attribute now supports custom a custom color/image for a picker column.
- New System Properties:

- MPC.ConfigDepth – returns the depth of a configuration in a nested configuration hierarchy.
- MPC.ConfigModifiedOn – returns the date/time on which the configuration was last saved.
- MPC.ConfigUpdatedOn – returns date/time or timestamp that is continually updated as the configuration changes.
- MPC.IsBaseModel – returns a TRUE value if current state of the configuration matches the standard options of the base model.

CRM

- CRMISOFFLINE() Function - returns true if Experlogix CPQ session is running in the CRM Outlook Client in offline mode.

NAV

- Added support for NAV Web Client (schema version 8.10)

Version 8 (8.00.0022 – 6.23.2017)

Design Center

- Paged Categories – for categories that contain many options, a specified number of options may be placed into numbered pages within the category. From Series/Categories/Display Settings, enable paging, page size or number of options per page, and paging navigation location.

Web Service

- Basic Authentication - Added support for Basic Authentication when connecting to the Web Publisher Service.

Outlook/CRM

- Experlogix Outlook Client Add-In – support for Outlook 2010+ and CRM 2011+ Outlook Client for both on premise and online installations.

AX

- Added support for AX7CU7

Version 8 (8.00.0021 – 5.30.2017)

Design Center

- **SET Rule Action** – enables input, range, and list properties in the rule conclusion to be set to a specific property value for all or specific selected options in a category. The SET action can also set the property value back to its default value.
- **Price Lists Properties** – Setting a property's level to Price List (P) gives the ability to set a default property value in a price list.
- **PROPVALUE() function** – dynamically resolves and returns property values via formula.
- **Import Batch Recalculation Setting** – from the settings.config/CPQ/, set Import Batch Recalculation to:

- RecalcOnEnd – property values recalculate after all options are loaded to configurator page. Designed for large option imports to improve option load time.
- RecalcOnEach - property values recalculate as each option is loaded to configurator page.

AX

- Added support for AX7 CU5 and CU6

Version 8 (8.00.0020 – 5.1.2017)

AX

- Added support for AX7CU4

Design Center and Web Configurator

- Various internal updates.

Version 8 (8.00.0019 – 4.3.2017)

Design Center

- Model Variants – From Assignments, create variants of a base Model with varied standard Options. To enable model variant selection in the configurator, add the Model Variants control in the Series/Model Option template from UI Designer.

AX, CRM, CRM Portal

- OAuth2 support added to Experlogix.STS to support latest authentication for AX, CRM, and the CRM Portal.

NAV

- Added support for NAV 2017 CU3 and CU4.

Netsuite

- Added support for NetSuite 2017.1

Version 8 (8.00.0018 – 3.6.2017)

Design Center

- Model Variants – Create variants of a base Model with varied standard Option assignments. From Assignments, select Model Variants to create a variant then select standard options.
- Option Helper – From the Category Toolbar, add Options to a Category via SQL query.
- HasErrors – system Boolean Property when added to a Category identifies whether Category is in an error state.
- ISOVERRIDDEN() – Boolean formula function identifying if a calculated Property has been overridden by user.
- CALCULATEDVALE() – formula function that returns calculated value for a Property even if overridden by the user.

Version 8 (8.00.0017 – 2.15.2017)

AX

- Added support for AX 2012 CU12.
- Added support for AX integrator extension for GetUserAccess() method.

NAV

- Added support for NAV 2017 CU2.

Netsuite

- Added support to generate ServiceSalesItem, ServiceResaleItem, and ServicePurchaseItem.

Version 8 (8.00.0016 – 1.26.2017)

Design Center

- Editable Calculated Properties – enables the user to override a calculated property value in configurator. The user can undo or reset the overridden value to calculated value if necessary. From the Categories: Properties view, select Overridable checkbox for a calculated property. This checkbox will only be available for properties with a source of Field, Formula, Lookup, Match, and Query.

AX

- Created ERP_ConfigTypeBom and ERP_ConfigTypeRoute to allow independent overrides of ERP_ConfigType.

GP

- Added support for GP 2016 and GP 2016 R2

Version 8 (8.00.0015 – 1.11.2017)

Design Center

- URM Runtime Category Type – User Interactive with Auto Remove (URM) categories function similarly to USR runtime categories, however, if option no longer meets runtime list query criteria the option is automatically removed.
- Tabbed Properties – divide Property Grid and Properties into separate tabs in UI Settings/Section Template/Property Grid Settings.
- Property Display State – Property Hide Formulas have been replaced with Property Display State formulas. Formula values and behaviors:
 - 0 – Displays Property (A Boolean FALSE value will also display the property.)
 - 1 – Hides Property (A Boolean TRUE value will also hide the property.)
 - 2 – Locks Property

Version 8 (8.00.0014 – 12.12.2016)

Experlogix CPQ 8 Design Center has been re-imagined and re-engineered to provide more functionality and streamline the user experience. Experlogix product modeling with Series, Models, Categories, Options, and Properties all remain the same, however, viewing and building your configurator has been made easier.

General Design Center Interface updates include:

- Simplified Design Center home screen with fewer hidden tools and utilities.
- New module views and record management for product modeling elements.
- Intuitive navigation including a new top menu bar.
- Formulas and Rules now open in a grid view making it easier to review and locate relevant items.

Relocated Tabs and Modules

- Assignments - All product modeling assignments whether Categories to Series, Options to Models, Rules to Models, and Option Cross References are now located in one convenient Assignments module.
- Constants and Defaults have been moved to Data/Prices. The Data/Prices now manages Constants/Defaults, Lists, Lookup Tables, Queries, Price Lists, Property Defaults, Category Extension Queries and Localization.
- Design Center Database Management, new, open, copy, and merge are now located on the Design Center home screen.
- More... utilities have been moved to Design Center home screen beneath Tools or Workspace. These include Import, Publishing Toolkit, Manage Data Connections, Series/Model Authorization, Manage .NET Assemblies, and Logs.
- Integration utilities have been moved to Design Center home screen under Settings and Entity Mappings.

Re-engineered Utilities

- Entity Mappings - Context Properties, Header Fields, and Mapped Properties are now Inbound Mappings and Outbound Mappings with the ability to read and write to all CRM/ERP host entities.
- BOM Designer has been redesigned to improve BOM creation and maintenance with architectural updates that manage Nested Configurations.
- Import Utility - has been redesigned to improve user experience and functionality including the ability to import directly from Excel.

New/Enhanced Functionality

- Nested Configurations - launch child configurations of component parts enabling property data to be read between parent and child configurations.
- Popout and Pinned Categories - enables Categories to be popped out or docked within the web configurator interface.
- Runtime Diagnostics and Debugging - from within the web configurator, see live diagnostics and logging including rules, output, category and property inspection, formulas, queries, and configuration XML.
- Category Extension Queries - enables the use of queries to populate constant property values at runtime.
- Rule Enhancements - including opening in grid view, new rule explorer, support for using Boolean operators in conclusions, AtMostOne rule action, and enhanced mirror actions.

- Option to Option Cross References - functioning like required rules, simply cross-reference a parent option to other child options, and the child options will be selected/deselected based on the parent option.
- Tabbed Category Navigation – display categories in a custom tabbed navigation structure within the configurator. Create tab “pages” in Category Hierarchy Designer then assign the category to its tab “page” in Series:Categories.
- Settings.Config Editor – With the release of Experlogix CQP 8, many website settings (web.config) were moved to settings.config. From the Publishing Toolkit, click Settings to enable and manage the following and more:
 - Common Settings
 - Diagnostics & Debugging Panels
 - Logging
 - Scripts
 - Style Sheets
 - Services
 - Category Bar
 - Message and Configurator Dialogs (Quick View, Option Picker etc.)
 - Pin Regions
 - Toolbar

Version 7.5 (7.05.0042– 9.8.2016)

NAV

- Quote Production Orders - Added support for the creation of production orders from NAV quotes.

NetSuite

- Added support for NetSuite 2016.2

Version 7.5 (7.05.0041– 8.2.2016)

Design Center

- Option Display State – a new system property that may:
 - prevent the deselection of an Option.
 - hide an Option.

Web Configurator

- Input Helpers – From the Section Template/Property Grid Settings, they enable the ability to present a dialogue to assist in the configuration of an input or range property which may have numerous possible values.

SQL Server

- Added support for SQL Server 2016.

Experlogix Internal Development

- Release 7.05.0041 contains internal development for upcoming Experlogix 8.0 features and functionality.

Version 7.5 (7.05.0040– 6.9.2016)

Web Publishing Toolkit

- Experlogix Site Resource File Management – Upload/Download/Delete OptionPicker.config, ListPicker.config, CSS, JS, image, and localization files from the Web Publishing Toolkit/Target Site.

Web Configurator

- Filtering List Picker Columns via Experlogix List – When utilizing a searchable list picker, column values in the list picker may be filtered via other Experlogix List. This functionality is managed from the ListPicker.config by associating the list picker column and @listname that will serve as a dropdown filter. Example: <column listname="ListName" name = "ColumnName"/>

NetSuite

- Added support for Manufacturing Routing.

Version 7.5 (7.05.0039– 5.13.2016)

Experlogix Internal Development

- The release of 7.05.0039 was primarily for internal development and testing for upcoming features and functionality.

Version 7.5 (7.05.0038– 4.8.2016)

Design Center

- Suppress Sales Lines for CRM, NAV, AX, and NetSuite – From Integration/Category Settings, enable Suppress Sales Lines to prevent the creation of lines for L level categories.
- Pricelist via Custom Context Property - the default price list may be selected via custom context property.
- HTML Format Display – allows values to be directed to onclick vs. href property.

NAV

- Recalculate Configurations – a recalculation function as been added to enable the recalculation of newly published data, formulas, and rules for existing Experlogix configurations in a single quote or order. User may select which configurations will be recalculated or skipped.
- ERP_Type – Added support to set the sales quote or order line type via ERP_Type mapped property.
- Zero/Negative Quantity Line – From Integration/Category Settings, set Zero/Negative Quantity Saves to enable saving lines to NAV with zero or negative quantity.

Version 7.5 (7.05.0037– 3.10.2016)

Design Center

- Price List: Designate Price Display Format - From the Table Designer/Price Lists, the price display format (culture, decimal places, currency symbol) may be designated for each price list. Select Properties for an open price list to make display format selection.
- Launch Option Picker via Formula Hyperlink – Using the ExpShowPicker() function in a formula enables the ability to create a hyperlink displayed in a text property which launches the Option Picker. Option Picker results may be filtered by passing: title, catID, and filters like SalesCode into the ExpShowPicker() function.

Website Settings (web.config)

- Publisher Service CustomerImprovement Publish Event Notification – From Website Settings (web.config), set CustomerImprovement to send publish event emails from hosted environments to Experlogix.

CRM

- Added support for CRM 2016.1

Netsuite

- Added support for NS 2016.1

Version 7.5 (7.05.0036– 2.1.2016)

Netsuite

- Added support for ERP_RouteName

Experlogix Internal Development

- The release of 7.05.0036 was primarily for internal development and testing for upcoming features and functionality.

Version 7.5 (7.05.0035– 12.30.2015)

Design Center

- Preview Default Properties – From the Category, Preview may be selected to display property values in the configurator prior to Option selection.
- Global Popup Property Management – From the Category, Global Popup enables the selection of Properties for display in the Global Popup Option Picker.
- ComboBox Sizing – Added support for List ComboBox sizing by percentage based on browser width.

CRM

- Support added for CRM 2016

AX

- Support added for AX 2012 R3 CU10

NAV

- Context Property support added for Sales Quote/Order Header records.

NETSUITE

- Support added for the creation and application of Manufacturing Routings to Work Orders.

Version 7.5 (7.05.0034– 11.30.2015)

Design Center

- Multiple Price Lists – Create and manage multiple price lists that may be set as default for both Series and Models directly or via CRM/ERP host Context Property.
 - From Tables/Lists:
 - Create/Manage Price Lists.
 - Set a price list to global default.
 - Add/Manage Effective Dates.
 - Add Price Date Functions: Copy Price, Explicit Price, Markup Price, and Expire Option.
 - Price List Option Filters: Price Set, Price Not Set, and Read Only.
 - Previous Standard Price List
 - Data/Prices: Price Tab Removed - What was the Price tab for Data and Prices is now managed in Tables/Lists in Price Lists in the ALL PRODUCTS price list.
 - Imported Prices - Imported prices from the Option Import Utility will appear in the ALL PRODUCTS default price list.
 - Set Default Price List in Series or Model Default Price List field.

NetSuite

- Added support for ERP_ExternalId, ERP_InternalId, and ERP_ProductType.
- Create items concurrently in NetSuite via Max Concurrent Connections per Session in Website Settings.

AX

- Support added for AX 2012 R3 CU9

NAV

- Support added for NAV2016

Version 7.5 (7.05.0033– 10.29.2015)

Experlogix Internal Release Only

- This release was primarily for internal testing and preparation for 7.5.0034.

Version 7.5 (7.05.0032– 10.6.2015)

Web Configurator

- Support for Edge Browser & Windows 10 - Verified compatibility with Edge Browser and Windows 10.

Design Center

- Category IDs Length Increased – CatID, SubCatID, and SuperCatID length increased to 30 characters.
- Tool Tips: Support Long Description - Added support for displaying Long Description in the tooltip, even if the option is not selected. Use tooltip token: \$option:longdesc.
- Table Designer: Dependent List- Alphabetize Dependent Values- Added support to alphabetize the display of dependent list values in the Manage Dependency dialog.

Version 7.5 (7.05.0031– 9.8.2015)

Design Center

- Rule Designer: Enhanced AutoFix Behaviors - AutoFix settings control whether errors produced by a rule are automatically fixed by the configurator or not. For example, if A requires B, and A is added, B will only be added automatically if AutoFix is true for that rule. If AutoFix is false, the user will be left to resolve the error manually.

AutoFix behavior is configurable on a rule by rule basis utilizing three settings:

- **Live:** AutoFix applies as the user makes interactive changes to the configuration.
- **On Create:** AutoFix applies when a new configuration is created. All errors generated by rules for which On Create is checked are automatically fixed before the screen is presented to the user.
- **On Edit:** AutoFix applies when a previously saved configuration is re-loaded for editing. All errors generated by rules for which On Edit is checked are automatically fixed before the screen is presented to the user.

In previous versions of Experlogix, AutoFix only controlled interactive (**Live**) behavior. **On Create** was always true for all rules and **On Edit** was always false for all rules.

Web Configurator

- Configuration Compare Summary Properties – Summary properties, like price total, may now be added to the Configuration Compare screen. By default, Total Price is available when the Configuration Compare section is added to Website Settings (web.config). The default .xsl template for Compare Summary XSL File is CompareSummary-TotalPrice.xsl, and may be customized through XSLT.
- Preferred Publish Set and Merge – When publishing multiple Design Center Databases to the same target site, multiple publish sets are present, and appear with different headers in the Series Selection screen. In Website Settings/Web Configurator Settings, Pref. Publish Set Name and Pref. Publish Set Title allow multiple publish sets to be merged visually during Series selection.
 - Pref. Publish Set Name – When set, this activates the merge of Series in web configurator Series Selection screen. The templates from this Preferred Publish Set will be used for display purposes. This value must match the Friendly Name set in More.../Settings for each publish set (Design Center Database).

- Pref. Publish Set Title – When publish sets are merged, this title will be used at the top of the Series Selection screen.

NAV

- Added support to set Ending Time on Production Order header.
- Add the ability to suppress the default routing for production orders in Website Settings/Microsoft NAV Settings/Company Settings.
- Removed support for NAV 2009.

GP

- For the MSGPCreateBom utility, added the ability to specify ITEMNUMBER.

Version 7.5 (7.05.0030– 8.10.2015)

Web Configurator

- Compare Configuration to Saved State – displays the comparison between the saved configuration, and open configuration. Click the Compare Configuration to Saved icon (two pages with magnifying glass) located in the main toolbar to display comparison.
- Print Configuration Comparison – added the ability to print the Configuration Comparison from the Line Item Already Configured screen.

Design Center

- Hide Incompatible Options Moved to Series/Category Settings – Manages how the configurator will display Options in the Category that are incompatible or excluded. Set this by Category to disable (grey out), hide, or allow (enable select) incompatible or excluded Options.
- Test SQL and CRM Queries/Runtime Lists in Table Designer - Added support to execute Queries/Runtime Lists tests from the Table Designer without publish.
- [CATEGORYID] and [CATEGORYDESC] added to Option Template – [CATEGORYID] and [CATEGORYDESC] maybe added to the Option Template elements from WebUI/Option Template.
- Select Configuration to Compare – From the Line Item Option Template, adding the Selector - [LINEITEMSELECTOR] to the template will enable the ability to select configurations to compare.

AX

- ERP_ExistsCheck added to Mapped Properties – ERP_ExistsCheck is a Boolean property that may be added to Categories to override the “Create Products if none exists” setting in WebSite Settings/AX Company. Set to TRUE, the configurator will always check if an item exists, and if not will create it. Set to FALSE, the configurator will never check or create a new item. If FALSE, and a matching released item is not found, an exception will be thrown in AX.

NETSUITE

- Added support for NetSuite 2015.2

Version 7.5 (7.05.0029– 7.13.2015)

Web Configurator

- Single Select Behavior for Runtime Categories – USR Runtime categories now support single select option functionality in the Option Picker window.

Design Center

- Rule Conclusions Support Definitions – Definition (Is a) rules may be added to Rule Conclusions. A Definition is a rule which defines a re-usable Boolean statement that evaluates to true or false. When a Definition is in the Conclusion, the configurator will enforce that the definition is true or false as appropriate. Only Link, Requires, Excludes, and Allows Rule Action types support Definitions in Conclusions.
- Category Joins – From Category Settings, utilize Join Previous to join or link categories visually in the Web Configurator. This setting hides the category headers and enables all joined categories to be collapsed or expanded under a single category header.

Version 7.5 (7.05.0028– 6.22.2015)

Design Center

- New Category Property Setting: Do Not Update in Propagate - When checked, the source settings for this property will not be copied to other categories when Propagate Property Structure is performed. This does not prevent the initial propagation of the property and source setting, it only prevents the source setting from being propagated during subsequent propagations. This also affects when category group clones are updated.
- Various internal updates.

Version 7.5 (7.05.0027– 6.1.2015)

Design Center

- Static Properties – A Property may be set to static in the Category, and its value will be available even when no option is selected. The Category must be assigned to the Series, however, a Static Property doesn't require an Option in the Model.
- Lookup Table Dropdown Lists – Create Lists in the Table Designer that may be used as dropdowns in manual Lookup Table data entry to ensure accuracy.

Web Configurator

- Single Select Category Dropdown List/Search – added dropdown list/search for single select popup categories. Enables selection of Option from dropdown/search of OptionID vs. the popup Option Picker. Dropdown is activated when Web Select Mode is set to popup for a single select category.

AX

- AX Web Configurator Service updated to allow creation of Product Variants, BOMs, and Routes when no Sales Order is present.

Version 7.5 (7.05.0026– 5.6.2015)

Design Center

- Tables and Lists Selective Publish – From the Design Center, Tables and Lists may be selectively published in order to update the configurator without the need to publish all data.
 - More.../Web Publishing Toolkit - Deselect Data and the Tables selection for publish becomes available. Advanced enables the selection of specific tables and lists to publish.
 - Tables/Lists – right-click table or list and select Publish to destination to publish just that table or list to a target site.
- Search Constant Values by Property – in Data/Prices/Constants and Defaults, right-click property and search for constant values in selected column.
- Search Prices by Option – Data/Prices/Prices click Search icon, and search for pricing records via Option ID or Description.
- Nullable Properties – from the Category, Properties may be configured as Nullable (far right property attribute). For example, it enables numbers and dates that would default to 0 to be nulled out. In formulas, numeric formulas referencing a nullable property would calculate the NULL value as 0 to prevent errors.
- NULL() function – added NULL() formula function. Property value in NULL() function returns NULL.
- ISNULL() function – added ISNULL() formula function. This inspection function enables the testing of a property for a NULL value.
- MPC System Properties ExperlogixUrl and ConfiguratorUrl – added ExperlogixUrl and ConfiguratorUrl to MPC System Properties.

Web Configurator

- List Picker Config – Added `<autoSaveOnSelect />` setting to ListPicker.config to reducing clicks required to save value to configuration.

Version 7.5 (7.05.0025– 4.9.2015)

Design Center

- ISINLIST() Formula Function- Added formula function ISINLIST() in Formula Designer/Inspection Functions. Determines if a value is in a specified list. Example: ISINLIST ([PAINT.COLOR], Red, Green, Blue, Orange)
- [MPC.HasErrors] - Added [MPC.HasErrors] property and attribute to XML indicating whether a saved configuration is in an error state. Used in conjunction with Series/Allow Save with Errors.
- Hide None Option – None Option for single select category now may be hidden if rule makes an option required.

Web Configurator

- Configuration Display Name - Added support for ConfigurationDisplayName property. If a property is created with this name and case “ConfigurationDisplayName”, and configured in a category, the configurator will use it by default when displaying configuration name in various configuration screens. The value of ConfigurationDisplayName only needs to be configured once in a single category.

- Hide None Option – None Option for single select category may now be hidden if rule makes an option required.
- Publish Required Indicator – On upgrade of Experlogix database schema, to prevent users from creating or editing configurations with outdated data or structures, configurations will be opened in read-only mode with an indicator that an Experlogix publish is required.

NAV

- Production Order Message Warning - Added the ability to warn users when attempting to create a production order when a production order has already been created for a Sales Order under a different status.

AX

- Provided compatibility for AX 2012 R2 CU7.

Version 7.5 (7.05.0024– 3.11.2015)

Dynamics CRM

- Recalculate Configurations from CRM – a recalculation function has been added to enable the recalculation of newly published data, formulas, and rules for existing Experlogix configurations in a single quote, order, opportunity, or contract. User may select which configurations will be recalculated or skipped.
- Recalculate functionality supported in CRM 2011, 2013, and 2015.

Design Center

- PreCompile – certain functions of the compile phase of publish are pre-compiled locally to enhance publishing performance. This step may be skipped in Web Publishing Toolkit/Advanced.
- Rule Name Length - increased to 50 characters

Website Settings (web.config)

- Experlogix Site File Manager Update – added Custom Function support to select and upload custom function dlls.

Web Configurator

- Web Configurator WCF Service updated to support configuration manipulation.

Version 7.5 (7.05.0023– 2.19.2015)

Web Configurator

- Runtime Web Upload - From the Web Configurator at runtime, Web Upload enables the selection of options, and the upload of property values from an Excel spreadsheet for existing options. From More.../Web Upload Designer... create mappings to Categories/Properties from Excel columns.
- Category Search Box – enables a dynamic Category Search box above a category to easily search options and select them. Enabled in WebUI/Section Template/Add [CATEGORYSEARCHBOX] control to template, and configure properties.
- Rule Error/Suggest/Message Dialog – now groups Options by Error, Suggestion, or Message.

Design Center

- Rule Priority – designed to manage conflicts between two or more rules, Rule Priority enables the ability to give priority of one rule over another when a conflict occurs. The rule with the highest priority “wins”. Priority is set on the Rule Conclusion, and 1 is the highest priority.

Website Settings (web.config)

- Experlogix Site File Manager – A file manager has been added to allow both on-premise and hosted customers using Publisher Service to add custom resource files to Experlogix site including custom: .CSS, .XSL, and .JS files to manage web configurator functionality.

AX

- Support added for Lean Manufacturing.

NetSuite

- Support added for NetSuite 2015.1.

Portal Solutions

- Support added for ADXStudio 7 (CRM Portal).

Version 7.5 (7.05.0021– 1.7.2015)

Web Configurator

- Auto-Focus Setting: automatically sets mouse/cursor focus to first focusable field/selector/image. Default setting is TRUE.

NAV

- Support added for NAV 2015.
- Added MSNAV2013R2 UI style.

AX

- Support added for AX 2012 R3 CU8.
- BOMs for AX Product Masters and Standard Products - Added support to create configured BOMs for standard products as well as product masters.

GP

- Support added for GP 2015.

Version 7.5 (7.05.0020– 12.17.2014)

Web Configurator

- Support for CRM 2015 – Experlogix now supports CRM versions 2011, 2013, and 2015.

Design Center

- Series/Category Settings Updates
 - Category Sequence – if enabled in More.../Settings, Categories may be sequenced in Series/Category Settings.

- Runtime Category/Runtime Type – From Series/Category Settings, Runtime Type may be set by Series.
- Runtime Category/Runtime List – From Series/Category Settings, Runtime List may be set by Series.
- Web UI Template
 - CanFocus – From the WebUI/Option Template, set the option element on which focus can be established for “clickable” behaviors.

Version 7.5 (7.05.0019– 12.4.2014)

Design Center/Website Settings

- Include Empty Series Setting – From the Target Website Settings (web.config), the configurator can be set to show/hide Series with no Models. Default setting: “Show”.

CRM/GP Integration

- Added support for Connector for MS Dynamics

Version 7.5 (7.05.0018– 11.12.2014)

Web Configurator

- Refresh/Reset Runtime Categories - Runtime categories can now be reset which clears the cache, and re-executes the query.
- Option/List Picker Display – supports viewing up to 1000 options versus 100 options.
- Option/List Picker Mouse Focus – when option is selected, mouse focus jumps to quantity field, if available.
- Updated FetchXML Query Support – FetchXML processing now supports linked or nested CRM entity attributes allowing them to be mapped to field properties.
- Volatile Query Support – SQL, CRM, and .NET queries can now be volatile, and will re-execute based on dynamic parameters.

Design Center Updates

- Table Designer Parameter Property Selector updates:
 - Literal – Enter a numeric, text, or Boolean literal constant input parameter value.
 - Special – Select Runtime Lists and Lookup Tables as input parameters. Eliminates the need to create an extra property to be used as input parameter after determining the published table or list name.

Version 7.5 (7.05.0017– 10.22.2014)

New MPC Properties

- ConfigRevision (MPC.ConfigRevision) - auto populates an incrementing number for configurations within same publish set.
- DocumentRevision (MPC.DocumentRevision) - auto populates an incrementing number for all configurations in quote/order/opportunity/estimate.

Various Internal Updates

- NAV 2013 R2 Certification Updates
- Updated Experlogix Config Database to 7.05.0008

Version 7.5 (7.05.0016– 09.24.2014)

Line Item Template (“Items Already Configured”)

- “Items Already Configured” screen XSLT Edit/View buttons – XSLT can now conditionally show the Edit/View buttons based on the presence of the configured Series.

Version 7.5 (7.05.0015– 09.4.2014)

Web Configurator

- Localization Support – web configurator now supports multiple translations of both Design Center data including:
 - Series: Description & Notes
 - Super Series: Description & Notes
 - Sub Series: Description & Notes
 - Model: Description & Notes
 - Category: Description
 - Super Category: Description & Notes
 - Sub Category: Description & Notes
 - Option: Description & Long Description
 - Option: Default Values
 - Property Labels
 - Rule: Messages
 - Miscellaneous Strings
- UI Translation – utilize strings.base.config to create localized UI string config files to manage interface translations. (Current functionality to be used in conjunction with Localization)
- Localization/Translation Selection – selection of translation shown to user is configured from the host CRM/ERP system launching Experlogix.

Design Center Updates

- Tables/Lists – Localization Tables Functionality – the Table/List Designer includes a new data module called Localization where multiple languages may be added, and translated terms may be entered by Experlogix module type. (listed above) Enables translations of Design Center data into multiple languages from a single Design Center database.
- Rule Designer – for Category or Option panes, right-click functionality added to display to filter rules based on category or option selected.
- Rule Designer – Drag and drop categories/options to the premise or conclusion is now a left click function (in previous versions it was right-click functionality)

NAV

- Support added for NAV 2013 R2

Deprecated Functionality/Support

- CRM 4.0 IFD no longer supported. 7.05.0013 is the last Experlogix version that supports CRM 4.0 IFD.

Version 7.5 (7.05.0014– 08.19.2014)

Web Configurator

- HTML Image and Hyperlink Element Formatting - Text property values can now be formatted as external images and hyperlinks.
- Custom Tooltip Functionality- Added tooltip support (popup text or images) in WebUI/ Section Template for properties, labels, and images.
- Hand Cursor – a hand cursor is now the default for elements that select/deselect the option including the selector, description, and image. Default may be disabled via template.

Design Center

- Rules – Else Action – Rules now support an Else Action and Conclusion that will be activated if Rule Premise is FALSE.

CRM

- ADXStudio 7 Portal Support

NetSuite

- NetSuite 2014.2 Support

Version 7.5 (7.05.0013– 07.23.2014)

Web Configurator

- List Picker Formatting – The ListPicker, configured in WebUI template, now supports custom formatting, similar to the OptionPicker.
- “Items Already Configured” Screen Customization – The “Items Already Configured” screen, which displays saved configurations, is now managed via XSLT (Extensible Stylesheet Language Transformations) enabling more flexibility and customization.

Design Center

- Right-click "Fill Down" functionality added to Category Settings/Web Select Mode.
- Right-click "Build Formula" functionality added to Category Settings/Category Display State Formula.

Version 7.5 (7.05.0012– 07.02.2014)

Runtime Categories for Web Configurator

- Runtime Categories enable the runtime creation of options based on a runtime list query in an established category. The runtime type in the category determines runtime method for option selection. Options may be selected by the user in an option picker or via functionality similar to Experlogix rule actions.
- Runtime Category Types include:
 - Link (LNK) - If runtime option meets query criteria, then option is required and selected. If option does not meet query criteria, option is excluded.
 - Required (REQ) - If runtime option meets query criteria, then option is required and selected.
 - Suggest Link (SLK) - If runtime option meets query criteria, then option is selected. If option does not meet query criteria, selected option is removed.
 - Suggest (SUG) - If runtime option meets query criteria, then option is selected, but may be removed by user.
 - User Interactive (USR) – Options meeting query criteria display in a pop-up Option Picker, and options may be searched for and selected by user. Option field or column data is determined by fields selected and returned in query.

Version 7.5 (7.05.0011– 06.11.2014)

- Added Support for SQL Server 2014
- Various Internal Updates

(7.05.0010 – 05.21.2014)

Web Configurator Localization

- Localization Support Framework – developed support for enhanced localization for future functionality.
- NAV, AX, and NetSuite will now render the Configurator according to the user's ERP designated language settings.

Design Center

- Runtime Categories – base functionality added for Suggest and Suggest Link types for Runtime Categories.

AX

- AX Model & Enterprise Portal is now compatible with AX 2012 R3 and Internet Explorer 10.

(7.05.0009 – 05.01.2014)

Design Center

- Design Center User Interface Updates – The Design Center now includes colored tabs, updated styling and icons.
- Status Bar Template for Web Configurator – The status bar template that enables property values and HTML formatting for the status bar has been moved from the WinUI module to Series module.
- New Design Center Skin - Settings form allow you to specify either “Default” or “Classic” style (classic gives you a windows standard background color). There is also a setting to turn alternate grid row highlighting on/off.
- All Series in Model Designer Grid - Added the ability to see all series at once in the model designer grid
- WINUI Updates - Win UI form has been re-arranged to only show settings that apply only to the Win UI. Generally applicable series specific settings have been moved to the series form. Saved Price default is now on the Settings form.
- Sort Icons - Replaced Sort by Sequence/Name dropdowns with A/Z and 0/9 icons
- Fill Down Functionality Moved - Replaced Fill Down buttons with right click menu function (where available)
- Print Buttons Moved - Replaced grid print buttons with right click menu function (where available)

Web Configurator

- Deferred Rule Execution – the execution of a rule may be deferred until configuration save or validate is selected in Web Configurator. Select Defer under the Rule Premise to mark a rule as deferred.

Log Viewer

- Find and Filter Mode Functionality – log records may be searched or filtered based on entered value in find/filter field. Select Find or Filter to change mode.
- .zip File Creation of Log Files – click the Save icon to log files in current location as .zip.
- Log Class Diagnostic Logging – Filter log records by record type: Diagnostic, Error, Warning, and Information.
- Modify Number Log Records Shown – from drop-down on the far right corner of window, modify the number of log records shown.

GP Updates

- ERP_PriceLevel Mapped Property - Added mapped property ERP_PriceLevel for "L" usage categories
- MSGCreatBOM Copies Configuration XML- When running MSGPCreateBom on an order that was created from a quote the system now copies the configuration XML from the quote to the order if that was not already done.

(7.05.0008 – 04.09.2014)

Web Configurator

- Option Picker - Reverse Order Enabled - from the OptionPicker.config, the order of the selected options may be set to newest options display first.
- HTML Safe Character Updates - enabling consistency of display for labels and input fields.

Web Solution Architecture

- PingFederate Authentication - Windows tools have been updated to properly login/authenticate with PingFederate as IP. Experlogix.STS now supports PingFederate as Identify Provider for CRM IFD.

Outlook Add-In Enhancements

- No longer requires admin rights (except on initial install and in select cases on upgrade).
- Logging settings moved to Settings dialog.
- Organization name now on Settings dialog.
- Credentials permitted (though with a warning) in non-SSL scenario.
- Log Viewer support added to Outlook Add-in.

(7.05.0007 – 03.12.2014)

Web Configurator - CRM Integration:

- Re-Order CRM 2013 Toolbar and Ribbon Buttons - from CRM Settings/Schema Manager rearrange Experlogix menu buttons.
- Duplicate Check - Added duplicate check at end of save in CRM integration. Experlogix will remove duplicate records if found.

NAV 2013

- Copy Sales Order Configurations - Configurations now copied with the copy of quote and order in NAV 2013

(7.05.0006 – 02.19.2014)

Web Configurator:

- Run-Time Categories - from Categories/Options an established category may use a runtime list to create options dynamically based on a Query or FetchXML query. The OptionID/SalesCode, Description, LongDescription, and SubCatID are automatically mapped from runtime list query.
- Hide Column Headers for Drop-Down List Column - enables the ability to hide column headers in drop-down list.
- Exact Match Filter - through checkbox both Option and List Pickers filters results may be filtered to exact matches only.

NAV Integration

- Description Character Length - increased to prevent truncated descriptions.

GP Configurator

- Declined Suggested Items - will no longer be added to configuration.

(7.05.0005 – 1.28.2014)

Web Configurator:

- Quick and BOM Views Support Series and Model Customizations - Views may be customized based on Series/Model.
- Option Picker and List Picker Multi-Column Sort - pickers may be sorted via multiple properties or fields.
- Option Picker and List Picker Hidden Columns - picker columns may be hidden as required.
- Category Layout Grid Images - Images now available in Template Designer/Grid Category Layouts.
- Hidden Property Columns - columns hidden with a hide formula will now be hidden for all options for hidden or unselected options.

NetSuite

- Selective field updates. Only updated properties will be updated on save.
- Support added for 2014.1

NAV Integration

- NAV Description Integration -Option descriptions will write to NAV automatically.
- NAV HeaderID Support - NAV integration now returns value for context property MPC.HeaderID.
- Direct price Support for NAV - from Integration/Category Settings. Setting Direct Price means that the configured price will not be sent to NAV, and enables NAV to set the price for the line item when added to quote or order.

Hosted Website Settings (web.config) - may be updated by customer through Web Publishing Toolkit/Target Site.

Log Viewer - Includes many enhancements including: pagination, faster load times, and more intuitive usage.

(7.05.0004 – 12.14.2013)

Web Configurator:

- Customize Series/Model text- using the string.base.config file, Series/Model text may be customized. For more information on full/partial text string replacement or translation see KB article string.base.config Translation.
- New Toolbar Functionality for Empty Pop-up Categories - Through modifying the category section template, change the display of an empty pop-up categories. This includes the ability display an "Add Option" button to category toolbar even when category is empty.

Design Center

- Table Designer: Associate List with Lookup Table Column - From the lookup table properties, select or create a list to be used for data entry. When setting lookup table field values, a drop-down or auto-complete may be used.
- GP Integration: Specify the Experlogix Database across all Users - Added the ability to Link and Unlink users within Integration Toolkit under GP settings. Linking attaches a single version of Experlogix that all users will open regardless of last database compiled.

(7.05.0003 – 11.21.2013)

- Context Properties - Context properties will now return only the default value if no value is found versus displaying an error.
- ADXStudio Customer Portal
 - Copy functions for Quotes, Orders, and Opportunities are now available ADX Studio Customer Portals 5 and 6.
 - Integration Support added for ADXStudio Portal 6.0.
- Option Import Utility – Creates properties on import if Create Property is selected in field mapping.
- LineBreaks - (CHAR(13)) are now recognized in Rule Message Window.
- HostOptionID – listed as a system property on Properties tab.
- GP Integration - Link and Unlink buttons added to establish a standard database link for all GP users.

(7.05.0002 – 11.6.2013)

- **Design Center**
 - Table Designer
 - .NET Queries and Lists – Queries and runtime lists may call custom code in the .NET language of your choice (e.g., C#, VB.NET, etc.)
 - Values retrieved from .NET Query or Runtime list may be mapped to field properties.
 - Categories/Options
 - Added HostOptionID – enables saving Option to host ERP/CRM with specific Host Option ID that may contain special characters or spaces.

- Properties - Create and assign property sources within Category tab - Create and assign the following sources from selected property vs. going to Data/Prices: Formula, List, Lookup, Match, and Query.
- **Web Configurator**
 - Web UI Language and Formatting Culture Updates
 - CRM Language selection may determine configurator language regardless of browser language culture.
 - Display Formats for text, numbers, boolean, and currency are not dependent on language selection (from browser or CRM)
- **AX support**
 - AX now supports compressing the configuration XML.

(7.05.0001 – 10.16.2013)

CRM 2013 support

- Released Experlogix Managed solution version 2.0.0.6
- Updated UI style for CRM 2013 (MSCRM60)
- Updated UI Quick View for CRM2013 (MSCRM60.xsl)

CRM 2011 support

- Experlogix 7.5 requires CRM Update Rollup 12 for CRM2011 integration.
- Database schema updated to 07.05.0000

Web Configurator

- Support to allow “read-only” or configuration view to be set programmatically.
- Installation documentation updated

Table Designer

- Table Designer now updates existing dependencies when values in a dependent list are changed and saved.

AX support

- AX Model updated for AX R2 CU6.

Version 7.0

(Final Build 7.00.0073 – 10.03.2013)

Design Center Enhancements

- Redesigned main screen allows for quick access to all commonly used functions via an elegant windows 8 style tiled interface. Product images can optionally be displayed on the Series, Model and Category/Option tiles. Version 7 tiles and menus cross reference to version 6.5 tiles and menus as follows:

Version 7.0

Version 6.X

Series	Series Designer
Models	Model Designer
Categories / Options	Parts Designer
Formulas	Formula Designer
Rules	Rule Designer
Tables / Lists	Table Designer
Data / Prices	Pricing and Property Sources
Web UI	Tools->Web Template Manager
Win UI	Viewer Designer
Compiler	Compiler
Test	Parametric Configurator
Integration	Tools->Microsoft Dynamics Integration Toolkit
Publish to <Default Target Site>	Tools->Publish To
Open Menu / Database Name Menu	File Menu
More...	Tools Menu

- **Categories**

- Added refresh button to the Parts Designer (Categories, Options, Properties) toolbar.
 - Added right click commands to Category/Properties grid for the following:
 - Set Match
 - Build Hide Formula
 - Build Error Formula
- Category Setting Defaults have been added to categories.
- Categories may be added to Series from the Category tab.
- Clear on Hide added to Category. Clears values from property when hidden.
- Prompt on Change added to Category. User is prompted when property value is updated.

- **Options**

- Options may be added to various Models from the Option tab.
- Start Date and End Date Effective dates supported in both web/win configurators.
- Options grid right click menu updates:
 - Replaced "Add Selected Options to Model" button on the options form with menu command, now lets you select which models to add to.
 - Added "Where Used" to list models the option is assigned to.
 - Added "Cascade Defaults" to propagate "Standard" setting to all models.
 - Added "Cross Reference" to allow an option to be cross referenced with one or more entries in a lookup tableOption Notes field added.
- Option ID's now allow most punctuation characters.
- New Settings added to control input property behaviors:
 - Prompt on change – if checked user will be asked to confirm property value changes
 - Clear on Hide – if checked when a hide formula becomes true the property value will be cleared

- **Properties**

- Added support for SuperCatID, SuperCatDesc, OptionIndex, and Record ID. These new properties can be added to categories to drive formulas or mappings.

- Support for SavedPrice property. Displays previous effective date price from standard price form.
- Field source type added. Enables the assignment of query values from Runtime lists and queries.
- Query source type added. Queries assigned as property source, and hold first value returned from query.
- Property formatting is now multi-cultural aware, supports telephone numbers, fractions, casing, etc.
- Once established, display format may be copied from property to property via copy and paste.
- Property notes field added.
- Prompt on Change and Clear on Hide properties defaults added.
- **Models**
 - Add ability to move a Model from one Series to another.
 - Added support for Sub Series selection.
- **Series**
 - Series Hierarchy Designer added. Enables the creation of Super and Sub Series. Creates a hierarchical structure for both Series (Super Series) and Models (Sub Series)
 - Added support for Super Series selection.
 - Added Notes to Category Settings.
- **Table Designer** – completely redesigned
 - TableDesigner editor now allows user to change row height (all rows resize).
 - TableDesigner edit cell dialog remembers its size and position in the session.
 - Lists, Lookup Tables, and Queries (new) are now organized into a tree style navigation bar.
 - Runtime Lists now enable the use of SQL or FetchXML to build dropdown list dynamically.
 - Queries, in addition to Runtime List, enable dynamic SQL and FetchXML queries. Query values may be mapped to Field Properties.
 - Properties may be used for Input Parameters for both SQL and FetchXML queries.
 - Database connections for Queries and Runtime list may be established for any of the following: SQL Server Database (Native Client), SQL Server Database (OLEDB), ODBC Data Source, Access Database, Experlogix Web Configurator Database, Microsoft CRM Database
 - Results from Queries or Runtime Lists may be mapped to Field properties.
 - Added support for Queries/Runtime List with conditional execution and, in the case of Queries, default and error values.
 - MDI interface allows more than one list or lookup table to be edited at the same time.
 - List and table editor support full search and sort functions
 - Additional columns (including indexes) can be inserted after a table has been initially created.
 - Data can be easily imported from CRM Picklists, Excel Worksheets, or SQL Statements against any SQL database
 - Data can be exported to an excel spreadsheet
 - Lists can be automatically created from lookup table indexes, option ID's etc.
 - Lists now support multiple columns of data, which can all be displayed in the drop down.
 - Table and List values can easily be copied from Excel spreadsheets.
- **Rules - Rules Designer**

- Supports multiple conclusion types with a single premise.
- Added the ability to include a property value in a rule message.
- Allows multiple select and right-click drag drop of categories, options and boolean formulas to premise or conclusion elements (as appropriate)
- Displays category and option descriptions with premise and conclusion grids. Hovering over an element shows a tooltip of the full description.
- Allows direct access to the formula designer to add new or update existing Boolean formulas.
- Added ability to filter to a single series on the rule assign form.
- Assign form now jumps to open rule for assignment to models.
- **Formula Designer**
 - Add Function syntax and example reference pane. Formula/function appears as selected from Functions tree.
 - Function Reference displays visual indicator of formulas that only function in web configurator. Function icon is highlight in “peach” color.
 - MPC System Properties (Properties Tree in Formula Designer)
 - **HostSystem:** The host system type which the configurator is running out of. Values are dependent on the integrator and include MSCRM, MSNAV, MSGP and MSAX (text values).
 - **PublishSetID, PublishSetName and PublishSetGuid:** Identifies the publish set of the series/model currently being configured.
 - **NewConfigNo:** [MPC.NewConfigNo] in Formulas/MPC System Properties will contain the config no that will be used when saving new configurations starting at 0.
- **Integration.**
 - Added ability to specify default values for context properties. The default value will be used if the host system cannot supply the context value.

Function Library Enhancements

- NSValue function now supports the querying of sub-entity properties.
- New Regular Expression Functions: These functions provide regular expression parsing capabilities.
 - *Boolean: RegexMatch(expr, regexString[, flags])*
 - *Text: RegexExtract(expr, regexString[, flags] [, groupName|groupNumber])*
- New Extended CRMSQL Functions: These functions perform an arbitrary SQL query against the CRM database for the current organization. The “volatile” version should be used only if the value of the data being queried is expected to change within a single configurator session. CRMSQL functions are only available with on-premise CRM installations.
 - *CRMSQL(sqlQuery, notFoundValue = null, errorValue = null)*
 - *CRMSQLIF(conditionalExpression, sqlQuery, attributeName, notFoundValue = null, errorValue = null)*
 - *CRMSQLVolatile(sqlQuery, notFoundValue = null, errorValue = null)*
 - *CRMSQLIFVolatile(conditionalExpression, sqlQuery, attributeName, notFoundValue = null, errorValue = null)*

NOTE: Although still supported, Runtime Lists and Queries are designed to replace these functions.

- New CRM Value Functions: These functions perform a query to CRM to retrieve any field value (including virtual attributes) from the designated entity identified by the entityId GUID. These functions provide CRMSQL like functionality for users of Dynamics CRM online.
 - *CrmValue(entityName, entityId, attributeName, notFoundValue = null, errorValue = null)*
 - *CrmValueIF(conditionalExpression, entityName, entityId, attributeName, notFoundValue = null, errorValue = null)*
- New CRM Header Value Retrieval Functions: These functions perform a query to CRM to retrieve any field value (including virtual attributes) from the header entity. Essentially, this maps to the entity (quote, order, etc.) being configured. **In practice it is best to use context properties wherever possible for this purpose but these functions are provided for use in special circumstances.**
 - *CrmHeaderValue(attributeName, notFoundValue = null, errorValue = null)*
 - *CrmHeaderValueIF(conditionalExpression, attributeName, notFoundValue = null, errorValue = null)*
 - *CrmHeaderValueVolatile(attributeName, notFoundValue = null, errorValue = null)*
 - *CrmHeaderValueVolatileIF(conditionalExpression, attributeName, notFoundValue = null, errorValue = null)*
- Custom functions now have built-in caching support.
- Added caching to the ERPSQL functions; includes support for ERPSQLVolatile and ERPSQLVolatileIF.
- Renamed extended MATCH and TEXT to MATCHEX and TEXTEX respectively so that the standard excel MATCH and TEXT functions are now supported.

General Web Configurator Enhancements

- Series now display Super Series (Series Hierarchy grouping).
- Models now display Sub Series (Model Hierarchy grouping).
- Lists can be configured as List Picker (popup window) from within Section Template/Property Grid Settings/List Combo dialog
- Added Save and Continue button to allow the saving of work in progress. Behaves like Save (in that the configuration will commit via the integrator), but the user's session will continue uninterrupted.
- The lookup dialog search functionality has been updated to support logical comparisons, exclusions, quoted values, and ranges. Logical comparison operators include AND, OR, NOT, + (to shorthand AND), and – (to shorthand NOT). Comparison operators include =, <, >, <=, >=, <>.
- Web Configurator will now identify when the user's session has been lost (i.e., due to a redeployment of the Configurator or a web.config settings change) and recover properly.
- Web Configurator will now prevent users from accessing the Web Configurator while a publishing operation is in process.
- Boolean property values now display as a checkmark rather than the text 'True' or 'False'.
- Added Support for Office 365 SSO in Web Configurator.

Template Designer Enhancements

- Series page section and option templates are now publishset specified instead of global. Added support for Category Grid Templates, which allow options and properties to be displayed in a grid format. Grid Types: Horizontal – Option Rows: Property columns, Vertical – Property Rows: Option Columns.
- Added functionality to export category layouts to both templates and assign to categories.
- Added DOESSELECT property to images. If set to true clicking on the [OPTIONIMAGE] allows for the option to be selected/deselected like the [OPTIONDESC] and [OPTIONLONGDESC]
- Template Designer now includes a 'Show All' option in property grid editor to toggle the display of all categories and just those mapped to the template.
- Added support for template-specific sequencing of fields, overriding the property sequence.
- Added "Hidden" property on [OPTIONSELECTOR] template control.

UI Style

- Updated UI styles; results in no separator between categories if the header is hidden. Also, if multiple contiguous categories have all their options excluded, prevents an accumulation of borders (appears as a thicker bar across the screen).

Integration

- Summarize functionality allows you to perform custom aggregate operations on header fields including SUM, AVG, COUNT, FIRST, LAST, CONCATENATE, MIN, MAX.

Series/Model Authorization Tool Enhancements

- Root Role securable allows series/model authorization rules to be set for a role irrespective of business unit depth and hierarchy.
- Support added for tagging/grouping securables.
- Context-menu support in the list of securables.
- MSCrm Organization securable.
- Legend now docks on UI rather than in a popup.
- Now supports paging and filtering for selection of CRM securables.

Dynamics CRM Specific Enhancements

- Added support for Federated ADFS with CRM Online.
- CRM 2011 proxy supports connecting to a CRM Online environment using an Office 365 Microsoft Online ID.
- Added the ability to place a button on the CRM Ribbon to launch the configuration BOM view.
- Added 'Remove all' icon to simplify the removal of buttons from the ribbons.
- Added ability to directly import CRM picklists to Experlogix dropdowns
- Added the ability to save line items with 0 or negative prices.
- Mapped property ID's (i.e., CRM_*) can now be up to 30 characters long. Checking the *Update existing property IDs* checkbox in the "Advanced" sync settings will convert truncated 15 character IDs to 30 characters during the custom field sync.
- Added Support for writing to Lookup fields in CRM.

Dynamics NAV Specific Enhancements

- Added support for syncing prices and verifying mappings.

- Added support for NAV 2013.
- Created a wizard for installing/upgrading customizations to NAV, simplifying the entire process.
- Added the ability to select any field from any of the NAV mappable entities NAV to add to mapped properties.
- Added support for writing to NAV comment lines on the Sales Lines, BOM Components and Routing Steps, including support for writing to the comment code.
- Added a config file setting to control the status that production orders are created in.
- Added functionality so that if a user clicks *Create Production Order*, and a production order already exists for the given configuration in the same status that it was originally created in, the system will give the user the option to either cancel, delete the old production order and recreate it, or create additional production order lines that are new to the configuration, leaving existing lines untouched (new function).
- Added ability to programmatically call the configured production order creation routine from a web service.
- Service credentials added to NAV support; Design Center users can now authenticate to NAV using credentials other than the currently logged-in user.

Dynamics GP Specific Enhancements

- Setting now enables the auto creation of MOs on save for both assemblies and subassemblies.
- Added integration to Willoware to allow automatic MO scheduling and picklist building (requires Willoware license).
- GP integrator now skips creating MO's for any configured BOM's created as Phantoms (ERP_BomCategory=3)
- Added support for the Category Direct Price setting in GP. Allows GP to calculate the pricing of a line item added by Experlogix.
- Added setting to GP Setting to allow GP to auto calculate commissions.
- Experlogix database selection is now done out of GP via Tools->Setup->Sales->Sales Order Processing->Additional Menu->Experlogix. The old database selector that was available from the start menu has been discontinued.
- Added additional mapped properties for Manufacturing Order Due Date and Routing Line Qty Next Start and Percent Next Start
- Added auto-population of Ship-To Method Code and Tax Schedule ID when creating line items.
- System now displays MO numbers after creating a configured BOM.
- Added support for writing to extended pricing tables IV10400 and IV10401 when creating a new item.

Experlogix Support for Dynamics AX

Experlogix now launches directly from within Dynamics AX to create configured quotes, orders and production orders. The two systems combine to form a powerful engineering and product management system, automating sales functions, production orders, and routings. Major features include:

- Launch Experlogix directly from ribbon icons in the AX quote and order windows in both the standard client and enterprise portal.
- Configure multi-line item quotes and orders.
- Map configured data back to any AX field.
- AX integration now allows users to manually create BOMs and Routes

- One click collapsible BOM View display allows for easy inspection of multi-level configured BOM's.
- Automatically create production orders with configured components and routings. Unlimited levels of subassemblies are supported.

Experlogix Support for Netsuite

Experlogix seamlessly integrates with NetSuite to form a powerful engineering and product management system, automating bill-of-materials (BOMs), production orders, costing and routing, and is deployed as a cloud-based solution.

- Launch Experlogix directly from ribbon icons in the Netsuite opportunities, quotes, and orders windows.
- Configure multi-line item quotes and orders.
- Supports Context Properties for Opportunity, Quote, Order.
- Automatically create production orders with configured components and routings. Unlimited levels of subassemblies are supported.

Technical

- A Web Configurator WCF service is now available to enables clients to programmatically add, load, delete, save, update, and fix configurations.
- Eliminated inconsistencies in table and field names between Design Center and Web Configurator databases.
- Opened browser support for Firefox, Chrome, Safari, and Opera.
- New with version 7.0 of the Experlogix Web Configurator is a feature known as a Web Integrator Extension. A Web Integrator Extension (WIE) provides notifications from the integration library at various points during the initialization and save process. By capturing these notifications, a developer can enhance, override, cancel, or even replace what occurs when a configuration is saved. MSCRM web integrator extensibility additionally allows developers to tap into the line item creation and deletion as well as the updating of the header.
- Added support for caching and pre-caching of series in the Web Configurator to dramatically cut page load time when first accessing the configurator.
- Log viewer updates have been made to allow for showing only Experlogix calls in the call stack.
- Database creation allows setting the sizes of the database and log file

Version 6.5

General Enhancements

- Added full support for running Experlogix in the cloud.
- Added support for the "Edit Duplicate" command, which can be added to the configuration selection screen via the template designer. This control makes a copy of a configuration and then directly launches the configurator to edit it.
- In the Series Designer, on the Category Settings tab, you now have the ability to assign a **Category Display State Formula** (Boolean or Number) that will enable you to hide or lock individual categories in the Web Configurator.

- A Boolean formula behaves like a Hide formula on a property. That is, if the formula evaluates to True, the category is hidden, otherwise it's visible.
- A Number formula allows you to control the state of the category based on the result (1 to 4):
 1. Hide – the category is not available for user interaction. The category disappears from category bar, main UI, and global popup.
 2. Lock Options – the user cannot make selection changes to the category though properties can be changed. Popup is not available and category is not available in global popup.
 3. Lock Properties – the user cannot make changes to the properties though selections can be changed.
 4. Lock – the entire category is locked. Popup is not available and category is not available in global popup.
- Added a setting in the category template to specify that a category should open in collapsed mode.
- Added the ability to clone groups of categories along with the logic interrelating those categories. To access the new group cloning functionality, press the **Category Groups** button on the toolbar in the parts designer. Give your group a name and enter the number of clones you want. Then add the categories that make up the group on the right. The cloning process does the following:
 - Makes copies of the categories, and renames each clone CatID_2, CatID_3, etc. After the clones are created you can change their category ID's and descriptions to whatever you want.
 - Makes copies of all the sales codes in each category. Again, the copies are named SalesCode_2, SalesCode_3, etc. You can create a formula to strip off the _N if you need the original salescode to pass back to CRM (make sure to add this to the parent categories).
 - Clones the Series/Category and SalesCode/Model assignments.
 - Clones rules that operate solely within the Group, which consist of
 - All Rules that have a premise and a conclusion within the group
 - All rule flags within the group
 - Reassigns lookup indexes appropriately
- Removed 255 character length restriction on rule messages.
- Performance optimizations throughout.

Design Center Enhancements

- Added functionality to the pricing screen to allow for markup percentages to be applied.
- Property defaults are now copied when you move an option to a different category.
- The Aquarium example database can now be used to create BOMs and production orders in both GP and NAV.

Dynamics CRM Specific Enhancements

Important note for Dynamics CRM Customers upgrading from 6.1 or earlier: The location where Experlogix stores configuration XML for quotes has changed (see below). If you are using Scribe to synchronize Experlogix XML to or from another source, you will need to make a few minor changes in Scribe. Additionally, if you are reading or writing Experlogix XML via your own custom program, you will need to recompile your code against our new integration libraries. Please contact support for more details.

- Added Experlogix Security Roles:
 - **Experlogix Configurator – Licensed User** - Users within this role have full access to the configurator and are counted against the Experlogix license key. Add users to this role in order to grant them access to the Configurator.
 - **Experlogix Configurator – Customizations Only** - Users in this role have access to the Experlogix entities in CRM but not to the Configurator. Add users to this role that need the ability to work with configured entities while not directly using the Configurator itself. For example, an account executive could be added to this role. This would allow the account executive to revise the quote, etc. (in turn copying the configurations behind the scenes) while not being able to use the Configurator directly.
 - **Experlogix Configurator – Publisher** - Users within this role have permissions to publish; it has no implicit permissions in CRM. This role is ONLY used with respect to the Experlogix Publisher Service which is used predominately for CRM Online and/or a hosted Experlogix Configurator.
- Added support for running Experlogix with CRM 2011 Internet Facing Deployments
- Added support for running Experlogix with CRM 2011 online.
- Added support for running Experlogix with the CRM 2011 portal accelerators.
- Updated CRM Customer Portal to use Orders view instead of Quotes view when displaying orders.
- Updated CRM Customer Portal to display orders and quotes ordered by creation date (descending).
- Added support for negative pricing on the opportunity, quote, and order entities in CRM 2011.
- Installer updated to deploy the Outlook Add-in as part of CRM integration (no longer a separate option).
- Improved logging of CRM service faults (errors).
- Added 2 new custom entities for storing the XML associated with opportunity, quote, salesorder and contract configurations. These entities are:
 - **exp_configuration**: maintains the link between the configured entity (e.g., the quote, salesorder, etc.) and the configuration XML.
 - **exp_configurationchunk**: contains the configuration XML. Very large configurations may be broken into multiple chunks.
- Added an **exp_setting** entity, for storing parameters used to configure the experlogix application.

Dynamics GP Specific Enhancements

- Added ability to write to the note on a BOM component.
- **ConfigNo** [MPC.ConfigNo] in Formulas/MPC System Properties: when editing, will contain the config no of the previously saved configurations, will be -1 for new configurations
- Added MSGPCreateBOM utility, which can be called from Scribe to automate the process of creating GP Configured BOMS and Manufacturing Orders after the order is pushed from CRM to GP.
- Added ability to create manufacturing orders for quotes.
- Added mapped property for Number of Machines on routing step.

Administrative

- Overhauled exception reporting in WebConfigurator. Added new 'Diagnostics: Show Errors' setting. Defaults to Full. Strongly recommended to set to None in production environment. This setting allows detailed error messages to be displayed directly in the browser within the configurator session, vs. in the log file only.

Version 6

General Enhancements

- Added 2 new rule types:
 - REM: Suggest Remove – When the premise becomes true the configurator suggests options or categories in the conclusion to be deleted
 - SLK: Suggest Link – acts as a combination of a SUG and REM rule, in the same way that a LNK rule acts as a combination of a REQ and EXC rule. When the premise becomes true the configurator suggests that the options/categories in the conclusion be added, when it becomes false it suggests that they be removed.
- The popup option selection dialog has been enhanced to allow quantities for selected options to be entered directly in the window. In addition, in multiple sales code categories, multiple instances of the same option can be added without having to leave the window.
- Added support for a 'Count' input field on the popup dialog (including AllowCountInput template property and lookup.config setting).
- The popup dialog now supports “clear all” toolbar option to remove all selections.
- The popup dialog will now allow for sub-category filters if they exist on the category.
- Added ability to specify a default sort column and order in the popup at the named lookup, category lookup, or the global level.
- Added support for a 'Global Popup' (i.e., a multi-category option popup), fully supporting disparate display properties and FilterFlags in the included categories. Categories to be included are specified by checking Global Popup in the Series Designer on the Category Settings tab.
- Added support for multiple-column dropdown boxes.
- Added support for defaulting dropdown boxes to a "blank" value. When "blank", the text "Please select..." appears (this is localizable and customizable).
- Added the ability to easily compare multiple configurations on a quote.
- General performance improvements throughout.
- If a save attempt fails in the configurator, the user session will no longer reset. Instead the user will continue where he left off.
- Added the ability to trace ERPSQL and CRMSQL calls.

Design Center Enhancements

- Added Series/Model Authorization Settings utility. This utility allows a user to establish rules that govern user access rights to particular series and models.
- Tag fields have been added to the formula and rule designers, to allow for better organization, documentation, and searching.

- Pressing the model button in the rule designer allows context to be narrowed to a particular model. Only categories and options and rules assigned to the selected model will be displayed, and any new rule created will be automatically assigned to that model.
- A new facility for creating branched version of rules for a particular morel or model(s) has been added. Can be used when a new model version is being released and it is desirable to preserve the capability to edit configurations of the old model under the original rule set.
- The import utility has been enhanced to automatically create constant properties and assign them to categories, as well as import their values. It can also assign options to models, as well as designate which ones are standard.
- CRMSQLIF and ERPSQLIF functions have been added as tools to increase performance by eliminating unnecessary database queries.
- COUNTDISTINCT function has been added.
- Categories in the Template Manager can now be sorted by sequence or name.
- Dynamics Integration toolkit has been reorganized to only show setting appropriate to the types of integrations selected. You can also now sort the mapped properties grid by clicking in the column headers, making it easy to group properties by the entities to which they apply.
- Added support for CatID, SubCatID, SuperCatID, CatDesc, CatSeqNo, SubCatDesc, SuperCatDesc, and RecordID properties. These new properties can be added to categories to drive formulas or mappings.
- Design Center now remembers your category sort preferences between screens and sessions.
- Design Center trace files are now written to the same folder as the other log files.
- Redesigned Tanker Demo database.

Utilities

- Added the ability to publish to multiple target sites with a single publish operation.
- Updated Publish.exe command-line utility to support sending an email upon completion of the publish process.
- Added ability to call the CRM product catalog synchronization function from a command line.
- General utility UI redesigns for usability.
- Database Uploader updated to optionally include images, custom files, and comments.
- Configuration Viewer now displays formatted configuration and bill of materials XML.
- Configuration Viewer updated to allow record filtering.
- Added Raw View tab in Configuration Viewer; displays when configuration is compressed.
- Added per-TargetSite option to confirm before publishing.
- Added proxy server authentication credentials to Target Site; CRM and NAV integrators updated to support authentication through a proxy server

Dynamics CRM Specific Enhancements

- Added support for using Experlogix within the new Customer Portal Accelerator
- Configure, Copy, and Quick View buttons can now be added to the CRM entity grid toolbar rather than just the entity form toolbar.
- Added support for RIDs (Record Identifiers) in the configuration XML. CRM now updated to support the mapping between options in the configuration to detail records. Updates to those options now guaranteed to write back to same detail line item and not be destructive.
- Added support for multiple organizations mapped to the same CRM database.

- The SaveMethodology CRM setting has been replaced with ConcurrentConnections. Can be used to throttle the number of concurrent threads are used to save asynchronously to CRM. NOTE: Currently, this defaults to 1 for consistency with previous versions. You are encouraged to set this higher (2, 3, 5, etc.) for a significantly faster save in CRM.
- Added support for specifying a custom Domain, User Name, and Password for invoking the CRM SDK methods with a user other than the impersonated user.
- Experlogix Outlook Add-in for CRM now deploys via Click-Once and is self-updating.
- Added support for connecting to the MSCRM_CONFIG database using SQL authentication when publishing; currently, it assumes that the credentials for the Experlogix database will also work against MSCRM_CONFIG. SQL auth will only ever occur if the Windows account fails to connect to the database and the TargetSite is configured for SQL auth.

Dynamics GP Specific Enhancements

- Added support for Dynamics GP 2010.
- Added SubAssembly MO Lead Time setting – set this to the number of days prior to the Top Level MO due date that you want sub assembly MO's to be due.
- Added Place MO on hold if SOP has Process Hold setting.
- Added logic to set In House Due Date based on GP preferences setting.
- Added ability to identify non-primary routings for use in MO's.

Experlogix Support for Dynamics NAV

Experlogix now launches directly from within Dynamics NAV to create configured quotes, orders and production orders. The two systems combine to form a powerful engineering and product management system, automating sales functions, production orders, and routings. Major features include:

- Launch Experlogix directly from ribbon icons in the NAV role tailored client quote and order windows.
- Configure multi-line item quotes and orders.
- Map configured data back to any NAV field.
- One click collapsible BOM View display allows for easy inspection of multi-level configured BOM's.
- Automatically create production orders with configured components and routings. Unlimited levels of subassemblies are supported.

Version 5.5

General Enhancements

- Improved Web Configurator installer. Simplified process for rolling out updates to the website.
- Full multi-lingual UI support; the website is now locale aware and will present the UI according to the user's preferences, provided the language is available.
- All UI elements can now be rebranded, rephrased, and changed as desired.
- Major performance improvement to popup option selection dialog display and navigation, particularly for large data sets.
- Popup option selection dialog now detects list-based fields and will display a dropdown list accordingly.

- Added support for **StartWithData** setting in popup option selection window; this setting controls whether the window initially appears with the first page of data already loaded.
- Added support for deferred option sorting: if Auto-Sort is false, sorted categories are not automatically sorted as their properties change – instead a new Sort toolbar button is available.
- Added support for opening the configurator in a read-only mode.
- The size of any popup dialog box can now be specified.
- Improved the rendering speed of categories and options.
- Added support for specifying a **seriesModelList** QueryString parameter, thus constraining the Configurator to just those series and models on the respective selection screens.

Category Bar Enhancements

- Categories can now be grouped by super category and presented in a Tree-View form.
- Added the ability to visually indicate which categories have selected options.
- Added support for auto-displaying the lookup dialog when a popup category is selected on the category bar.

Template Designer Enhancements

- Category templates support new GroupBySubcategory property, enabling the grouping of options within a single category section in the website.
- Property Grid properties now support a Visible property; this is in addition to any Hide formula. This feature was developed in anticipation of developing property-driven dynamic data like hyperlinks and images.
- [OPTIONID], [OPTIONDESC], [OPTIONLONGDESC], and [OPTIONPRICE] all updated to support new properties: ForegroundColor, FontFamily, FontSize, Italic, and Underline.
- Category templates now have a new ConfirmOptionDeselect property that, when True, will prompt the user when a selected option is deselected by the user.
- Property grid columns now support right and left padding to control the spacing between columns.
- Property grid properties now support a LabelColumnWidth property to explicitly set a desired width; minimized the sudden “jump” in size when hidden properties become available.
- Multi-line textboxes now fully support word-wrapping.
- Margins can now be specified on the option block within the category region.

Design Center Enhancements

- The associated source ID's for relevant properties can now be directly seen in the parts designer (i.e. formula names, lookup table names, list names, match sources)
- You can now create a formula directly from the parts designer / category tab, by right clicking on a property whose source is formula and clicking "Build formula". If a formula already exists for that property you can go directly to edit it.
- You can now create a new property from the "Add Properties to Category" dialog (saves having to go back to the property tab to create the property and then come back).
- You can now open the model designer without first having to add a category.
- System properties, such as SeriesId and ModelId can be used for list dependencies.

- A list of recently opened databases has been added to the Design Center file menu for quick access.
- The Formula Designer window has been reorganized for better usability.

Utility Enhancements

- Database Uploader now optionally includes log files when submitting databases.
- Database Overview Report (MSCrm Manager) can now be printed.
- New Quick View report shipped (mscrm40_salescode).
- Better handling of distributed MSCrm web services.
- DBAmin utility (MSCrm Manager) verifies the existence and accessibility of databases.

Web Publishing Toolkit Enhancements

- Publisher validates context properties against the target database.
- Better output of verbose details when the “Show verbose output” advanced option is selected
- “Log activity” advanced option.
- “Show details” advanced option.
- Now support “Compile-Only” and “Optimize-Only” actions on already-published data.
- Restructuring of the Web Publishing Toolkit UI; now more intuitive and natural.

Microsoft Dynamics CRM Specific Enhancements

- Full support for CRM On Premise + IFD deployments.
- eService Accelerator Portal support improvements.
- Added Quick View button to CRM interface (Configure, Copy, Quick View).
- Improved the handling of the deletion of the last line item in a configuration.
- Added new “UserAccessRules” property that allows an administrator to define his own custom logic that determines whether a configuration is opened read-only or if the user has full control.
- Configurator is automatically opened in read-only mode if the CRM entity record cannot be changed (e.g., an Active Quote, or a Closed Order) or if a price list is not assigned.

Microsoft Dynamics GP Specific Enhancements

- Added the ERP_ItemClass property. This property value can be used when creating new items in the GP item master to specify the item class that field values should be defaulted from.

Version 5.3.1

Design Center Enhancements

- Added default values for Hide and Print to the Parts Designer Property grid.
- Added right click menu item to Parts Designer property grid to cascade default settings to all categories.
- Added “Show Hidden Properties” to right click menu on design center parametric configurator property sheet.

- Added Move Up and Move Down buttons to the Parts Designer toolbar to make it easier to re-sequence items.
- Added “New” button to parts designer toolbar to facilitate addition of new properties, categories and options.

Micorosft Dynamics GP Specific Enhancements

- Added the ability to create a manufacturing order for a top level item and configure the routing name for that MO. To enable this feature, set the ERP_BOMName property on the Top Level Assembly Item to “MFG”.
- When *Create Manufacturing Orders for Subassemblies* is checked, Manufacturing orders are now created for non-phantom component items with MFG BOMS whose Fulfillment Method is set to *Make to Order - Manual*.
- Experlogix will now automatically assign the item’s primary routing name to MO’s that do not have a configured routing or use the ERP_RoutingName property.
- Added ERP_Note property, which can be used to configure notes on manufacturing orders and items that are created by Experlogix.

Technical

- Memory and performance optimizations targeted for large load applications

Version 5.3

CRM / Web Configurator Enhancements:

- Added the ability to specify the order that selected items within a “popup” category display on the main Experlogix screen. The order is controlled via the SortOrder setting on the lower property window in the Category Designer.
- Added the ability for the user to select which options to add when a non-autofix suggest rule is fired.
- You can now have the configurator display a warning when an option is deselected. In the Category template in the CATEGORYSETTINGS control, there is a property called *ConfirmOptionDeselect*. If you set this property to true, the user will be prompted when a selected option is deselected.

GP Configurator Enhancements

- Added support for phantom subassembly creation in Experlogix configured BOMs through use of the ERP_BOMCategory property.
- Added ability to use an already configured BOM in a manufacturing order. To use this feature, add the mapped property ERP_BOMName to any “A” usage category. Experlogix will then use the already existing configured BOM with the name specified in that property on the Manufacturing Order, rather than creating a new one.
- Added support for using the GP tax engine to compute sales tax on configured line items.
- Added the ability to perform credit checks and assign process holds on configured line items.

Design Center Enhancements

- Added ability to change the font in the formula designer.
- Added SeriesDesc and ModelDesc as built in properties.
- Added support for new aggregate functions MATCH, COUNTIF, and SUMIF. MATCH can now be used to easily return a property value for a specific SalesCode in a multiple select category.
- Added the new Airplanes example database.

Template Designer Enhancements

- Redesigned WYSIWIG property grid editor makes laying out columns, adding headers and separators, etc. much easier and more intuitive.
- Added the ability to directly launch the template designer on a specific template by right clicking the template in the Web Template Manager.
- Added new 'OptionDisplayOrientation' property in the PAGESECTIONSETTINGS template control. Options can now be displayed Left-to-Right/Top-to-Bottom or Top-to-Bottom/Left-to-Right. Effectively, you can now organize your options across columns or down rows.
- Category and property id changes made in the design center are now automatically propagated through to templates.

Utilities

- Added Database Uploader to Utilities menu in Start Menu. The Database Uploader provides an easy to use mechanism for sending your data and log files to the Experlogix support team.
- Redesigned Web Publishing Toolkit for greater efficiency and ease of use. Now allows saving user preferences for advanced settings.

Technical

- Web configurator supports IE7 and IE8.
- Added support for Microsoft CRM installations where the CRM Services reside on a different server than CRM itself.
- Made switch from XHTML Strict to XHTML Transitional for better cross-browser support as well as to handle non-conformant template HTML.
- Performance and scalability improvements throughout, particularly on the re-loading of large previously saved configurations.

Version 5.2

Web Configurator Enhancements:

- **Popup Window for Option Selections** - This enhancement is designed to make it much easier to navigate and search large product lists. Sub functions include:
 - Allows filtering, sorting and easy multi-select. A category can be configured to use this window by setting Web Select Mode in the Series Designer to "Popup".

- Added support for both Multiple Usage and Multiple Salescode properties in the Web Configurator for Popop categories.
 - Added new FilterFlag built-in property that can be added to a category. This property, when assigned a Formula, will pre-filter the popup window.
 - The dialog will display only those options that are valid for selection. Options excluded by rules, FilterFlag formula, or any other means will not be available.
 - An Active Filter row at the top of the window allows users to filter the option list, and allow for a wide range of comparisons (e.g., > 5, < 3:15 AM, etc) and simple wildcards (e.g., w*).
 - Clicking the column headers will sort the result set by that column.
 - Multiple pages can be traversed via navigation buttons and links in the lower-right portion of the screen. Additionally, users can enter a page number and press <ENTER> to jump to a page.
 - A new 'All A B C D ... Z' link bar (similar to that found in CRM) is available in the lookup window to quick filter the result set.
 - To customize the appearance and behavior of the lookup dialog, a lookup.config file can be created and added to the \experlogix folder in the website. This file can be customized to control column order, width, alignment, and formatting on a per-category basis.
- **Ability to Select an Option More Than Once** - This enhancement allows Experlogix users to add the same sales code (Option) to a configuration more than once, without having to set up multiple instances of that sales code in the Design Center. Each instance of the selected Sales Code can have different property values associated with it.
 - **Date/Time Enhancements** - Added support for a calendar control to pick dates and times, and simplified the process of creating date or time related calculations. Any NUMBER field with a format of DateTime, DateOnly, or TimeOnly that is also an INPUT field will display with a custom date/time selector control in the website. This control accepts dates entered in many different formats (e.g., 12/9/2008, Dec 9, 2008, December 9th, 2008, day after tomorrow, 12/9, Dec 9, etc. are all valid dates). Date/Time fields (with the format of DateTime, DateOnly, or TimeOnly) are properly recognized by the Popop option selection window and will properly format, sort, and filter therein.
 - **Misc Web Configurator Enhancements**
 - All popup windows can now be optionally displayed in "overlay" mode
 - Html tags can be used in template property labels to allow bolding, color coding, etc
 - Category section templates are much easier to define and maintain
 - Quick View now shows formatted property values
 - Custom toolbars can be added to any category template
 - Main toolbar help icon shows all compatibility messages across all categories in one window.
 - Disabled options now display semi-transparent and disabled. This semi-transparency applies to the entire option (image, control, descriptions, etc).
 - Previously, only the description of an option in an error state would turn red. Now, all the text for an option will turn red, making it easier for users to identify and fix issues.

- The Hide Heading option in the Design Center will now function properly. This setting, if true, will override any template setting. It will force the header to not exist in either the Category Bar or in the main content area of the Web Configurator.
- Added support for custom config section definition files. This is to support custom settings that may be needed for custom integration libraries. These are consumed by the Config File Editor and treated like any of the other built-in sections.
- Web.config version validation is performed when attempting to publish. Restructured web.config file layout.
 - Created new settings sections: Lookup Dialog Settings, Quick View Dialog Settings, and Message Dialog Settings. Each of these gives control over the appearance of the various dialog boxes the Configurator displays.
 - Moved Print View XSL File setting to the Quick View Dialog Settings.
 - Added new 'Empty Popup Category Display Mode' that allows you to determine how to display a Popup category that has no options selected. Valid values include Show, Hide, and Ghost.
- Where applicable, the Configurator will attempt to make the text context-aware by performing some simple token replacement within the text. Though not universally applicable, many of the common tokens that can be used in Toolbar button text, tooltips, Toolbar text, etc include the following: \$CATID, \$CATDESC, \$CLIENTID, \$SERIESID, \$SERIESNAME, \$MODELID, and \$MODELNAME.

Template Designer Enhancements

- The Open Template dialog now remembers the last template type you've opened.
- Completely restructured the various "Page Section" templates. These include the Series, Model, Category, and Line Item Selection templates. These templates no longer contain HTML that gets rendered within the browser. Instead, they contain various 'Settings' controls that determine the appearance, layout, and behavior of the page section.
- The new Page Section settings controls include the following:
 - [PAGESECTIONSETTINGS]. This control allows you to customize the layout of the page including column count and width as well as background color, image, positions, and repeat.
 - [TOOLBARSETTINGS]. Each of the Page Section templates allow for a customizable and context-sensitive toolbar to be placed at its top. This control allows a user to specify a list of buttons with their own respective image, URL, target window (new window, modal, overlay), and tooltip.
 - [CATEGORYSETTINGS]. This control dictates the appearance of the category block including whether the header and help icon are visible.
 - [POPUPSETTINGS]. This control instructs the Configurator how to present the 'Add Option' link for categories with a Web Select Mode of 'Popup'; for 'Classic' categories this control's settings have no effect. The user can specify the text to display, the title of the ensuing lookup dialog, and the display mode of the lookup option. Additionally, you can control some characteristics of the lookup dialog including how many rows per page, whether the user can 'active filter' the result set, and whether the selected options pane is present in the dialog.
 - [PROPERTYGRIDSETTINGS]. This control effectively replaces the property grid Option control in previous versions.

- Users have greater control over the appearance of properties in the property grids.
 - HTML that may be embedded within the property label will no longer be HTML encoded.
 - Alignment has been fixed to properly align text within the 'value' of the property row. Textboxes as well as constant values can be aligned within the cell. Both values as well as labels can be independently aligned.
 - A 'Font' control style has been introduced to the Property Set. This allows you to specify the font to use for the 'value' portion of the property in the property grid. Supported fonts include Arial, Consolas, Courier New, Tahoma, Times New Roman, and Verdana.
 - Removed the 'Justify' alignment. Only supported alignments include Left, Right, and Center.
 - A Time Interval property has been added. For DateTime or Time fields, this allows you to specify the interval used between times in the 'Time' dropdown.
 - A Date Format property can be set that overrides the format specified by the Design Center.
 - Users can now 'merge' the property grid's row. This allows the label and control (i.e., Checkbox, TextBox, Dropdown, etc) to be combined into a single cell rather than split between cells.
- The label can be positioned either on the left or right of the value. This works for both merged as well as non-merged cells.

GP Configurator Enhancements:

- Configuration data is now carried over when a configured quote is transferred to an order.
- Text Templates and Long Descriptions can now be selected as match sources (previously this was a web only function). The match source property for these must reference the same category.
- Added a category setting to allow similar BOM components to be consolidated. The setting can be accessed from the Dynamics Integration Toolkit->Category Settings Tab. Checking this setting will cause all instances of a specific item number to be rolled up into a single BOM component with the total required quantity.
- Generally improved error reporting and handling throughout.

Technical:

- Built on the .NET 3.5 platform
- Web configurator requires IE7 or above.

Version 5.1

Configurator

- Performance and scalability improvements throughout
- Added support for Windows Server 2008
- Added ability to automatically add items via an Autofix suggest rule
- Added the ability to specify another property as the default value for an input or list property.

Allows “calculated” default values.

- Property values can now be right justified.
- Added setting to disable postbacks while configurator is processing
- Clarified error messages to direct users to the log file.
- Added setting to place borders on images.
- Added ERPSQL built in function to allow easy querying of external databases.

Design Center

- Added search function to the Parts Designer.
- Product attach screen allows larger selection size.
- Added the ability to easily create, name and link a formula to a calculated property via the right click “Create Formula” command on the formula designer property tree.
- Template Manager window is now resizable.

Misc

- Redesigned database manager for CRM 4.0 allows central administration and security management of all Experlogix databases.
- Enhanced Log Viewer
- Further streamlined the XML used to represent a configuration
- Compiler no longer stops on “incomplete lookup information”.

Version 5

Publish Process

The publish process has been completely redesigned. Enhancements include:

- Ability to easily set up multiple target sites on a single development machine, making publishing to multiple configurator destinations simpler. For instance, target sites could be defined for Dev, QA and Production.
- Support for configurator development by distributed teams by allowing multiple Design Center databases to be published and merged into a single web configurator instance.
- Ability to automate the publish process thorough a command line script.
- Ability to eliminate the downtime usually associated with publishing by automatically switching between mirror configurator sites. One site can continue to function while the second is being updated, at which point an automatic switch-over will occur.
- Ability to archive published data for backup and recovery.
- Significant performance improvements

Configurator

- Added the ability to launch the Quick View from the configuration line item screen.

Microsoft CRM Specific

- Added support for Microsoft CRM version 4.0.
- Added ability to compress the configured XML stored in the CRM database to conform to CRM 4.0's 100K limit on NTEXT fields.

Version 4.7

Configurator

- Performance and stability improvements have been implemented throughout the system.

Design Center

- Added the ability to assign categories to groups, and to propagate a property structure from one category to all of the others in the same group.
- Added the ability to assign rules across all models on a single screen.
- Added the ability to reference the configuration ID of the configuration being edited inside formulas.
- Added the ability to control the visibility of individual options and properties in the Quick View (formerly Print View).

Utilities

- Added a log file viewer utility, to aid in analyzing log files. The viewer can be accessed from Program Files->Experlogix->Utilities.

Microsoft CRM Specific

- Added the ability to easily copy an opportunity, quote, order or service contract. The new copy utility can be added directly to the toolbar on the respective CRM screens.
- Added the CRMSQL formula function, which allows formulas to be written that query the Microsoft database directly via a SQL statement.

Version 4.6

Installation and Setup

- Streamlined installation process.
- The system now uses the '%ALLUSERSPROFILE%\Shared Documents\Experlogix' directory for samples databases, user databases, and templates.

Configurator

- Added support for dependent lists.
- Added ability to copy a configuration
- Added the ability to implement a custom model selector, which can replace the built in series and model selection pages.
- Property values can now be referenced on the line item selection screen.
- Property grids have extensive new formatting capabilities:
 - separators
 - multiple columns
 - custom colors
 - text box width
 - custom labels
- When a category is excluded by a rule, the options within it are now grayed out.
- Excluded options can now be hidden completely, instead of being just grayed out. Behavior is controlled by the *Hide Incompatible Options* setting in the viewer designer.
- Fully supports case sensitive SQL server databases.
- Supports new version of Avalara Avatax web service
- Performance improvements
- The system now warns you when editing a configuration if a previously selected option is no longer available.

Design Center

- Added an import utility, which can be used to easily import product and price lists into the system.
- Added bill-of-materials designer.
- Added ability to hide a model.
- Added *Show Unused* function to the Parts Designer, Formula Designer, and Rule Designer, to aid in cleaning up unnecessary items.
- Compiler now allow you to jump directly to any category in the overview
- Compiler now shows error messages in the overview
- Dashes are now allowed in category ID's.

Microsoft CRM Specific

- Added support for Microsoft CRM 3.0 in offline mode.
- Added CRM_ProductNum property. When this property is attached to a category, the CRM integrator will add the product whose ProductNumber matches the value of that property as a line item when the configuration is saved. If no matching product is found, the item will become a write-in.
- Added CRM_ProductDesc property This property can be used to control the product description of write-in products added to a quote or order.
- Added Direct Price setting to the category Settings tab of the Microsoft CRM Integration Toolkit. When set, the system will get an item's price directly from the CRM price lists when the configuration is saved.

- The attach CRM products screen now allows filtering
- The CRM integrator now validates the maximum length of mapped fields, and truncates written values if necessary.
- CRM Product to mapped Experlogix option synchronization is now bi-directional, and the sync utility has been revamped for usability.

Version 4.5

General

- Added support for Microsoft CRM version 3.

Installation and Setup

- Added Server Settings editor to simplify web configurator installation process. Manual editing of web.config is no longer necessary.
- Added utility to automatically create the required Experlogix custom fields and mappings when installing for use with Microsoft CRM 3.0. Use of CRM's manual customization tools is no longer necessary.
- The web error log can now be redirected to a file or the Experlogix database. It is also possible to set the desired verbosity level of the log.

Configurator

- Rule Flags are now implemented. A rule flag allows the premise of a rule to consider any of the parametric properties of the options within a specific category, even if those options are not selected. Some examples of logic that can be implemented with a single rule are:
 - Select an option via a lookup table.
 - Suggest rules are now implemented.
 - Calculate the price for each option in a category and automatically select the one whose price is lowest.
 - Automatically select options in one category whose color matches the color of the selected option from another.
- Performance has been improved by only sending recalculations to the client when necessary.

Design Center

- Web compiler now checks for invalid or missing list defaults.
- Added "mapped" column to option grid to easily identify which options are mapped to the CRM product catalog
- The system now allows slash and period characters in option ID's (sales codes).
- Added ability to set source default for properties.
- Removed invalid number formats from the number format dialog.

Version 4.2

Configurator

- Multiple configurations can now be added to a single opportunity, quote or order. Each configuration can create one or more line items. The system administrator can specify through the Multi Config setting in the Server Settings dialog whether more than one configuration is allowed. When editing a configuration in a multi-config setup, the user is asked to identify which configuration he wants to edit, or if he wants to add a new one. Individual configurations can also be deleted.
- Hide formulas have been implemented. A hide formula can be used to hide or reveal a property value or input field based on any user definable condition.
- Error formulas have been implemented. An error formula can be used to highlight in red a property value or input field based on any user definable condition.
- Option long description can be passed back to CRM via a mapping.
- Configured text template can be passed back to CRM via a mapping. The text template can format a large block of custom text containing property and/or option values.
- The configurator can write to the CRM ship to fields at the detail record level.
- Print checkboxes now control visibility of individual options and properties in the print preview window.
- Web configurator recognizes the series hide setting.
- Configuration XML can be saved to a file during the save process. This can be useful for routing data to external systems via BizTalk.

Design Center

- Added Avatax function to allow automatic sales tax lookup via a web service (requires Avalara account). The Avatax function can be accessed in the financial function set in the formula designer.
- Shipped new fixed-width templates, which make it easier to lay out product selections in a tabular format.
- All CRM data synchronization functions have been consolidated into a new “Data Sync” tab in the CRM Integration Toolkit.
- Product catalog custom fields can be accessed as property values. These fields will show up as Special Properties in the CRM integration toolkit after a Data Sync operation is performed.
- Added utility for creating products in CRM from configurator options. This allows the configurator to be used as the primary product maintenance tool, and changes to be “pushed” to the CRM product catalog.

Version 4.1

Configurator

- Added ability to specify an input property as required. Required properties are identified on the page with the same convention that CRM uses.
- Added User ID as a property so that rules and formulas can be user specific
- Added ability to search for part id's, descriptions, etc. on the configurator page.

- Added CRM_Price property, to allow for greater flexibility in pricing CRM line items. CRM_Price can be used in situations where a list price exists but the desired line item price is calculated or otherwise manipulated.

Design Center

- Added support for custom functions, which can be written in any .NET language and then used in the formula designer.
- Added control over whether configurations can be saved when compatibility errors exist.
- Formulas arguments with a special shorthand form like this, [.Property], where the category is omitted, can now be used to indicate that the property is in the same category that the result applies to. This allows a single formula to be used in many different categories. An example would be a discount amount calculation, where every category had a discount percent property, which was input by the user, and a discount amount property, which was calculated. The formula to calculate the discount amount would be $[\text{Price}] * [\text{DiscountPct}] / 100$. This same formula could be used in every category where the calculation was required.
- Property Groups are a new configurator feature that allows you to define a repeating set of calculations within a category. Property group setup is accessed from the toolbar of the Parts Designer.
- Enhanced shipped template set
- Publisher warns of missing templates

Notes through 7.05.13

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