

Configure to Order Manufactured Products, BOMs, and Prices

Create unique manufactured parts with bill of materials and routings using the rules-based Product Configurator. Flexible configuration rules calculate components and pricing.

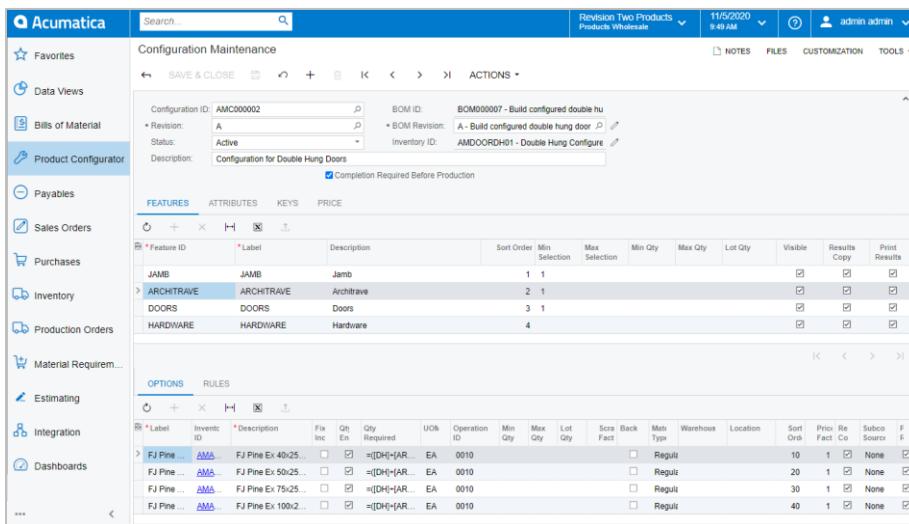
Rules-based product configurators use pre-defined attributes, features, and options to create custom-manufactured parts using dependency rules and user-defined formulas. The Product Configurator is available from Sales Order Entry and CRM Opportunities.

Each configuration can be identified with a unique configuration key. The key contains the parameters selected for the configuration. The key can be referenced to generate new configurations to use as templates to create similar manufactured products.

Configuration rules provide flexible definitions for costing and pricing using base definitions with mark-up amounts or percentages for each feature and option selected.

The Product Configurator supports dependency rules across features and options where selecting one option in a feature set can restrict or require options in other feature sets. For example, a particular door style choice in the door feature set can require a specific jamb type in another feature set, or it can restrict the list of available hardware options in another feature set.

Create production orders from sales order entry for newly configured parts. Tailor quotes and orders to include configuration details on printed forms and reports.



The screenshot shows the Configuration Maintenance screen in Acumatica. The main area displays a table of features and their attributes. Below this, a table of options and their formulas is shown. The top navigation bar includes tabs for Configuration Maintenance, Notes, Files, Customization, and Tools.

Feature ID	Label	Description	Sort Order	Min Selection	Max Selection	Min Qty	Max Qty	Lot Qty	Visible	Results Copy	Print Results
JAMB	JAMB	Jamb	1	1					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ARCHITRAVE	ARCHITRAVE	Architrave	2	1					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DOORS	DOORS	Doors	3	1					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HARDWARE	HARDWARE	Hardware	4						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Label	Description	Fix Inc.	Qty Required	UON	Operation ID	Mins Qty	Max Qty	Lot Qty	Spec Fact	Back	Man Type	Warehouse	Location	Sort Ord	Pri. Fact	Re Co	Ref. Source	F F
FJ Pine ...	AMA	FJ Pine Ex 40x25...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	= D * A *EA	0010			<input type="checkbox"/>	Regul	10	1	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>			
FJ Pine ...	AMA	FJ Pine Ex 50x25...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	= D * A *EA	0010			<input type="checkbox"/>	Regul	20	1	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>			
FJ Pine ...	AMA	FJ Pine Ex 75x25...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	= D * A *EA	0010			<input type="checkbox"/>	Regul	30	1	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>			
FJ Pine ...	AMA	FJ Pine Ex 100x2...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	= D * A *EA	0010			<input type="checkbox"/>	Regul	40	1	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>			

Define features with variable options and attributes. Use formulas to calculate required quantities, bill of material components, and other values for production, and pricing.

KEY BENEFITS

FAST ORDER CONFIGURATION

- Create a new configured order by merely copying or modifying an existing configured order or quote
- Create new item configurations using configuration entry to select attributes and feature options.

GAIN CONTROL OVER REVISIONS

- Make multiple revisions of the same configuration while maintaining a history of the revisions.
- Use flexible rules to ensure the manufacturability of every unique configuration.

DETERMINE PRICES WITH EASE

- Calculate prices for items with roll-ups from the configured bill of material with mark-ups by option.
- Create formulas to calculate material component quantities and pricing.

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PRODUCT CONFIGURATOR FEATURES AND CAPABILITIES

Configure to Order

Configure any item using predetermined features and options. The results of the configuration carry forward to a production order.

Dimensional Capability

Use multiple dimensional calculations and formulas to calculate the material requirements for the specific components of configuration.

Order History and Look Up

Quickly look up a customer's previous configuration to create a new order or make adjustments from the prior configuration.

Formula Validation

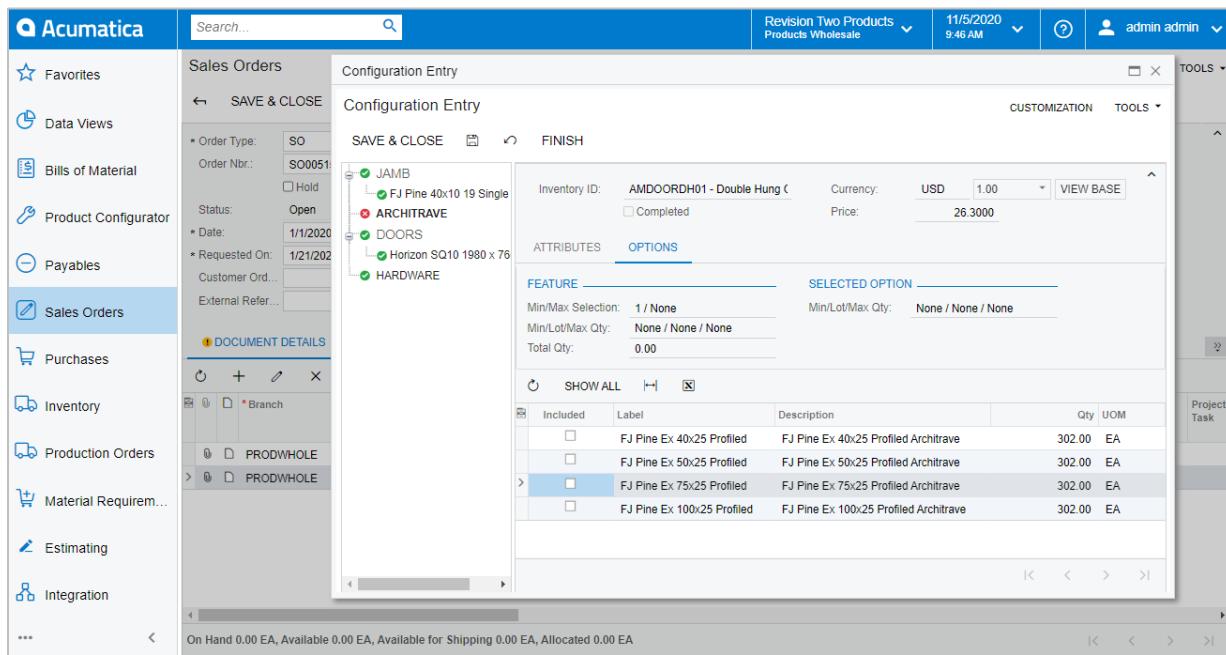
Validate formula calculations based on a minimum or maximum attribute value or the quantities chosen for selected features and options.

Non-Stock Items

Include non-stock items with stock items in configurations.

CRM Opportunities

Create configured items for sales opportunities in CRM.



The screenshot shows the Acumatica Product Configurator interface. The left sidebar has a 'Sales Orders' icon selected. The main area shows a 'Configuration Entry' screen for a 'JAMB' product. The configuration tree on the left includes 'JAMB', 'FJ Pine 40x10 19 Single', 'ARCHITRAVE', 'DOORS', 'Horizon SQ10 1980 x 76', and 'HARDWARE'. The right side shows product details: Inventory ID: AMDOORDH01 - Double Hung C, Currency: USD, Price: 26.3000. Below this are sections for 'ATTRIBUTES' and 'OPTIONS'. The 'OPTIONS' section shows 'Included' items: FJ Pine Ex 40x25 Profiled, FJ Pine Ex 50x25 Profiled, FJ Pine Ex 75x25 Profiled, and FJ Pine Ex 100x25 Profiled. The 'Description' column for these items includes 'FJ Pine Ex 40x25 Profiled Architrave', 'FJ Pine Ex 50x25 Profiled Architrave', 'FJ Pine Ex 75x25 Profiled Architrave', and 'FJ Pine Ex 100x25 Profiled Architrave'. The 'Qty' column shows 302.00 for each, and the 'UOM' column shows EA. At the bottom, a message says 'On Hand 0.00 EA, Available 0.00 EA, Available for Shipping 0.00 EA, Allocated 0.00 EA'.

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