

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.

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.

The screenshot displays the 'Configuration Maintenance' screen in Acumatica. The configuration ID is AMC000002, and the BOM ID is BOM000007 - Build configured double hu. The revision is A, and the BOM revision is A - Build configured double hung door. The status is Active, and the inventory ID is AMDOORH01 - Double Hung Configure. The description is 'Configuration for Double Hung Doors'. Below this, there are tabs for FEATURES, ATTRIBUTES, KEYS, and PRICE. The FEATURES tab is active, showing a table with columns: Feature ID, Label, Description, Sort Order, Min Selection, Max Selection, Min Qty, Max Qty, Lot Qty, Visible, Results Copy, and Print Results. The table lists JAMB, ARCHTRAVE, DOORS, and HARDWARE. Below the features, there are tabs for OPTIONS and RULES. The OPTIONS tab is active, showing a table with columns: Label, Inven ID, Description, Fix line, Qty, Qty Required, UoM, Operation ID, Min Qty, Max Qty, Lot Qty, Sort Fact, Back Type, Warehouse, Location, Sort Ord, Prior Re Co, Subco Source, and P F. The table lists four options for FJ Pine with different descriptions and quantities.

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

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 displays the Acumatica Product Configurator interface. The top navigation bar includes the Acumatica logo, a search bar, and user information (Revision Two Products, Products Wholesale, 11/5/2020 9:46 AM, admin admin). The left sidebar shows navigation options like Favorites, Data Views, Bills of Material, Product Configurator, Payables, Sales Orders, Purchases, Inventory, Production Orders, Material Requirement, Estimating, and Integration. The main window is titled 'Configuration Entry' and shows a configuration for 'FJ Pine Ex 75x25 Profiled Architrave'. The configuration includes a list of features and options, a table of included items, and a summary of quantities and prices.

Included	Label	Description	Qty	UOM
<input type="checkbox"/>	FJ Pine Ex 40x25 Profiled	FJ Pine Ex 40x25 Profiled Architrave	302.00	EA
<input type="checkbox"/>	FJ Pine Ex 50x25 Profiled	FJ Pine Ex 50x25 Profiled Architrave	302.00	EA
<input checked="" type="checkbox"/>	FJ Pine Ex 75x25 Profiled	FJ Pine Ex 75x25 Profiled Architrave	302.00	EA
<input type="checkbox"/>	FJ Pine Ex 100x25 Profiled	FJ Pine Ex 100x25 Profiled Architrave	302.00	EA

ABOUT ACUMATICA

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