

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

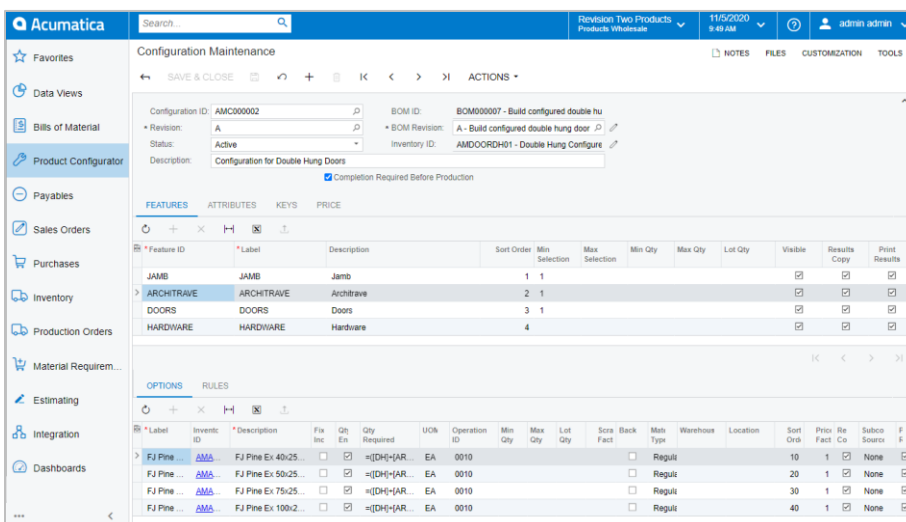
- Create a new configured order by merely copying or modifying an existing configured order or quote
- Create new item configurations using configuration entry to select attributes and feature options.

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 shows the 'Configuration Maintenance' window in Acumatica. The configuration is for 'Build configured double hung door' (BOM ID: BOM000007). It lists features like JAMB, ARCHTRAVE, DOORS, and HARDWARE. Below the features, there are 'OPTIONS' and 'RULES' sections. The 'RULES' section shows a table of options with columns for Label, Inven ID, Description, Fix line, Qty, Qty Required, UoB, Operation ID, Min Qty, Max Qty, Lot Qty, Sort, Back Fact, Mats Type, Warehouse, Location, Sort Ord, Prior Re Co, Subco Source, and P F.

* 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"/>
ARCHTRAVE	ARCHTRAVE	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	Inven ID	* Description	Fix line	Qty	Qty Required	UoB	Operation ID	Min Qty	Max Qty	Lot Qty	Sort	Back Fact	Mats Type	Warehouse	Location	Sort Ord	Prior Re Co	Subco Source	P F	
FJ Pine	AMS	FJ Pine Ex 40x25	<input type="checkbox"/>	<input checked="" type="checkbox"/>	=([DH]-JAR	EA	0010					<input type="checkbox"/>	Regult			10	1	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>
FJ Pine	AMS	FJ Pine Ex 50x25	<input type="checkbox"/>	<input checked="" type="checkbox"/>	=([DH]-JAR	EA	0010					<input type="checkbox"/>	Regult			20	1	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>
FJ Pine	AMS	FJ Pine Ex 75x25	<input type="checkbox"/>	<input checked="" type="checkbox"/>	=([DH]-JAR	EA	0010					<input type="checkbox"/>	Regult			30	1	<input checked="" type="checkbox"/>	None	<input checked="" type="checkbox"/>
FJ Pine	AMS	FJ Pine Ex 100x2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	=([DH]-JAR	EA	0010					<input type="checkbox"/>	Regult			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.

ACUMATICA CERTIFIED PARTNER

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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

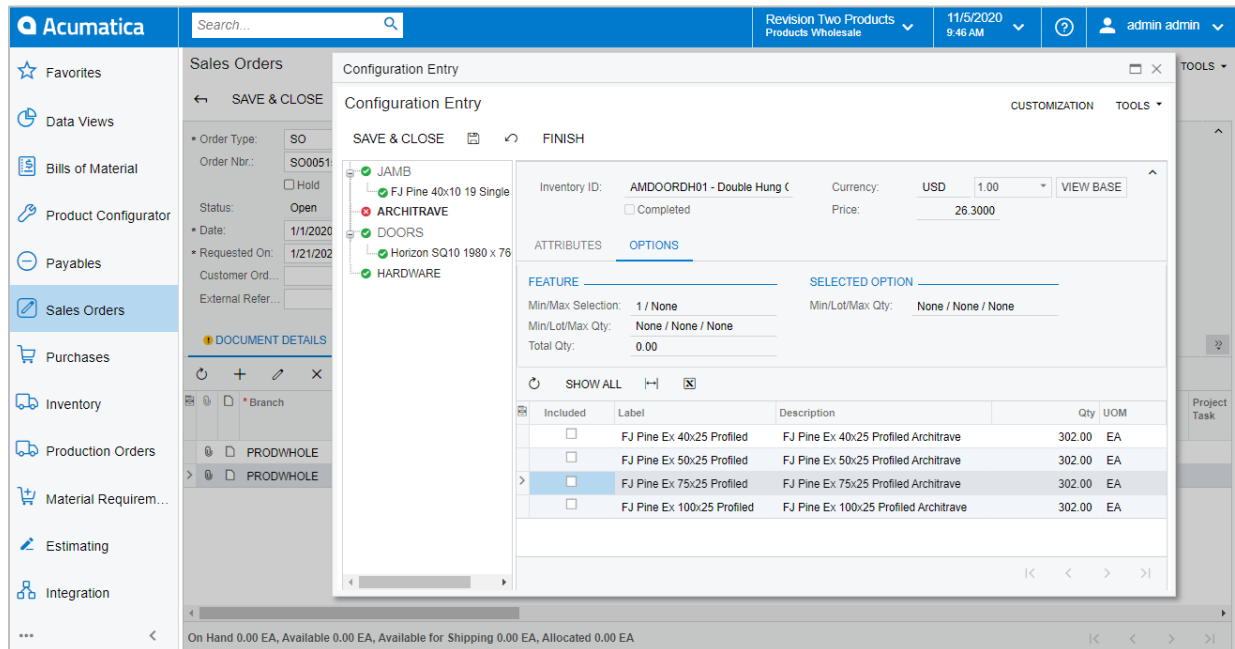
Validate formula calculations based on a minimum or maximum attribute value or the quantities chosen for selected features and options.

Non-Stock Items

Include non-stock items with stock items in configurations.

CRM Opportunities

Create configured items for sales opportunities in CRM.



ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

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