

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 ID is AMC000002, BOM ID is BOM000007 - Build configured double hu, and the description is 'Configuration for Double Hung Doors'. The interface is divided into 'FEATURES' and 'OPTIONS' sections.

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	Invent. ID	Description	Fix Inc	Qty	Qty Required	UoM	Operation ID	Min Qty	Max Qty	Lot Qty	Scrs Fact	Mth. Type	Warehouse	Location	Sort Ord	Prio Fact	Re Co	Subco Source	F S
FJ Pine	AMS	FJ Pine Ex: 40x25	<input checked="" type="checkbox"/>		=([DK]-[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 checked="" type="checkbox"/>		=([DK]-[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 checked="" type="checkbox"/>		=([DK]-[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 checked="" type="checkbox"/>		=([DK]-[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.

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 contains navigation icons for Favorites, Data Views, Bills of Material, Product Configurator, Payables, Sales Orders, Purchases, Inventory, Production Orders, Material Requirement..., Estimating, and Integration. The main window shows a 'Configuration Entry' for 'FJ Pine Ex 75x25 Profiled Architrave'. The configuration tree on the left includes JAMB, FJ Pine 40x10 19 Single, ARCHITRAVE, DOORS, Horizon SQ10 1980 x 76, and HARDWARE. The right pane shows 'Inventory ID: AMDOORDH01 - Double Hung C', 'Currency: USD 1.00', and 'Price: 26.3000'. Below this, there are sections for 'ATTRIBUTES' and 'OPTIONS'. The 'FEATURE' section shows 'Min/Max Selection: 1 / None' and 'Min/Lot/Max Qty: None / None / None'. The 'SELECTED OPTION' section shows 'Min/Lot/Max Qty: None / None / None' and 'Total Qty: 0.00'. A table at the bottom lists included items:

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

At the bottom of the window, it shows 'On Hand 0.00 EA, Available 0.00 EA, Available for Shipping 0.00 EA, Allocated 0.00 EA'.

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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