



Product Configurator

The rules-based product configurator provides flexibility to define attributes and formulas to create a unique bill of material and routing for finished goods with calculated costs and pricing. Configure products based on features, options, and dimensions to streamline the quote-to-order and manufacturing process. Configure manufactured items for quotes, sales orders, and production orders.

- Rules-based product configuration
- Create formulas for calculated quantities and costs
- Configure products for quotes, sales orders, and production

Key business benefits

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

Related resources

- Multi-Modal Manufacturing with Acumatica > [LEARN MORE](#)
- Manufacturing Metrics Made Easy > [LEARN MORE](#)
- Schedule a Personalized Demo > [LEARN MORE](#)

Configure-to-Order Manufactured Products, BOMs, and Prices

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

Create unique manufactured parts with bills of materials and routings using the rules-based manufacturing Product Configurator. Flexible configuration rules calculate component quantities, costs, and customer 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 configuration key can be referenced to generate new configurations to use as templates to create similar manufactured products using previously defined parameters in case of repeat orders.

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 restrict the list of available hardware options in another feature set.

"Acumatica seemed to have the best alliance to meet our very customized need around our rug configurator, so infinite combination of size and [style or color] combinations, which the manufacturing module and the configurator were able to meet."

—Peter Bonoff, Global Operations, Curran

> CUSTOMER STORIES

Configure-to-Order

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

Configure-to-Stock

Manufacturers may build configured products to stock in advance of peak demand seasons using the product configurator to define forecasted finished goods and their variants.

Price Calculation Options

Acumatica supports flexible price calculations for configured products. Calculate prices using a fixed price defined for the parent finished good. You can also roll up the sales price for configuration options and order multiples, including or excluding fixed materials on the bill of material. Prices may also be calculated using defined parent prices plus rolled-up costs for child items and their respective options.

Dimensional Capability

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

Quote to Sales Order Conversion

Configured items on quotes are copied to sales orders when the quote is converted.

Print Configuration Details on Invoices

Configuration options and details may be optionally printed on customer invoices.

The screenshot shows the Acumatica Configuration Entry 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 main interface is divided into several sections:

- Sales Orders:** Includes fields for Order Type (SO), Order Nbr. (SO0051), Status (Open), Date (1/1/2020), Requested On (1/21/202), and Customer Ord.
- Configuration Entry:** Shows a tree view of configuration items: JAMB, FJ Pine 40x10 19 Single, ARCHITRAVE, DOORS, Horizon SQ10 1980 x 76, and HARDWARE.
- Inventory ID:** AMDOORDH01 - Double Hung C, Currency: USD, Price: 26,300.00.
- Attributes and Options:** Includes fields for Min/Max Selection (1 / None), Min/Max Qty (None / None / None), and Total Qty (0.00).
- Table:** A table with columns 'Included', 'Label', 'Description', 'Qty', and 'UOM'. It lists four items: FJ Pine Ex 40x25 Profiled, FJ Pine Ex 50x25 Profiled, FJ Pine Ex 75x25 Profiled, and FJ Pine Ex 100x25 Profiled, all with a quantity of 302.00 and UOM of EA.

Create unique finished goods using the rules-based product configurator based on item attributes such as size, style, and color with formulas to calculate required component quantities, costs, and pricing.

ABOUT ACUMATICA

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