Product Configurator Battle Card

For Microsoft Partners who sell Insight Works apps

Product Configurator turns sales quote and order option choices in Microsoft Dynamics 365 Business Central into items with their own bill of materials (BOM). Production items also get their own routing, and planning, costing, and scheduling treat configured items like any other item.

WHO TO CALL ON

Manufacturers on Business Central that sell custom or optioned products built with production or assembly BOMs.

Users include salespeople who quote configured products and engineers who maintain bills of materials and routings.

AT A GLANCE

Business Central	Online and on-premises
Licensing	Per company, subscription, no user limit
User license	Full user license, Essentials or Premium; Team Member for quoting only
Languages	11 languages, including English, French, German, and Spanish
Availability	All countries where Business Central is available

What changes when you add Product Configurator to Business Central

	Business Central without Product Configurator	Business Central with Product Configurator
Quoting custom products	Building a BOM and routing by hand for each custom order is slow and invites errors.	The Configurator BOM Designer opens from a sales quote or order. Salespeople pick options while cost and weight build, then add the item to the sales line.
Invalid combinations	When any option can pair with any other, a quote can promise a product the shop cannot build.	The Product Configurator Rule Builder is configured, not coded. Rules hide or show options, set values, raise errors or messages, and ask yes or no questions.
BOM and routing	Engineers spend their time keeping hundreds of near-identical BOMs in sync.	Each configuration produces a production BOM with an item-specific routing, or an assembly BOM. Formulas on option values such as length calculate component quantities.
Planning configured items	High quote volumes can fill the item list with items that are never ordered.	Configured items are standard Business Central items, so planning and costing pick them up. Quoting items share one base item number until a quote becomes an order.

Selling points

Configure from the quote or order.
The Configurator BOM Designer opens from a sales quote or sales order.

Complete BOM and routing.
Formulas on option values such as length calculate component quantities and routing run times.

Standard Business Central data.
Material requirements planning (MRP), the planning worksheet, and costing pick up configured items with no extra steps.

Rules, not code.
Rule Builder hides or shows options, sets values, raises errors or messages, and asks yes or no questions.

No duplicate items.
A configuration that already exists reuses its item instead of creating a duplicate.

Licensed per company.
One subscription covers the whole company with no user limit, and Team Member users can create quoting items.

Qualify the opportunity

1. Are you on Business Central today, or another ERP system?
2. How do you create BOMs and routings for custom products today?
3. How many products do you sell with options, and how complex are they?
4. How long does each new product configuration take, and who does it?
5. Do complex products make accurate sales quotes hard to produce?
6. Do quotes ever include combinations your shop cannot build?
7. Do component quantities or run times depend on values such as length?
8. Do your engineers maintain many near-identical BOMs?
9. Who will build the configurations: your team or your Microsoft Partner?
10. Will you run Business Central online or on-premises?

Common questions

Does it run on Business Central online?
Yes. Product Configurator runs on Business Central online and on-premises.

What Business Central license is needed?
Full use needs a full user license on the Essentials or Premium tier. A Team Member license can create quoting items on sales quotes only.

How are component quantities calculated?
With formulas on option values such as length. Routing run times can be calculated the same way.

Does it need other Insight Works apps?
No. Product Configurator does not require any other app.

How is it licensed?
One Product Configurator subscription covers the whole company, with no limit on the number of users.

Who builds the configurations?
The customer's team or the Microsoft Partner sets up item categories, options, choices, and rules. Insight Works trains the team and supports the app.

Which languages are available?
Danish, English, Estonian, Finnish, French, German, Icelandic, Italian, Norwegian, Spanish, and Swedish.

Resources

Sales kit: insight-works.com/partner-hub/product-configurator

App page and demo: insight-works.com/apps/product-configurator

Datasheet: Product Configurator datasheet (PDF)

Partner hub: insight-works.com/partner-hub

Your Insight Works contacts

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For a pre-sales meeting, a demo, or implementation guidance, send a message at insight-works.com/partner-hub/contact.

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