Configuration Worksheet

The Configurator is a flexible software tool designed to allow for the creation of unique and in-depth bills of material or sales orders based on a series of questions and answers asked of a prospective buyer. The configurator guides the user through the question and answer process such that the end result could be a sales order configuration consisting of multiple line items or a single line item representing a bill of material.

The heart of the Configurator is the Configuration Maintenance function. The configuration maintenance function creates a series of questions and responses that drive the item setup. This setup function is where the real work needs to be done.

The TRAVERSE Help for the Configurator sample configuration setups follow this worksheet. Use this worksheet to plan your configuration before you enter it into the system.

Planning – Stage 1

The first step in creating a configuration is defining what you want to configure. Before making any entries into the system for your configuration, you need to plan what you want to configure, the options you will present to the user, and the pricing scheme you want to use for the configured item.

What can the user configure?

List the parts of the configured item the user can customize, such as size, color, and other choices that determine other options. For example, if the configured item is a lawn mower, the user might customize the power source (gas, corded electric, cordless electric), the size of the mower deck, whether they want a bagger, or the type of blade.

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What is included in the configured item that the user cannot customize?

List the items that are required to be included in the configured item. These should be items in which the user has no choice or option. For example, if the user chooses to configure a gas-powered lawn mower, items that must be included might be a spark plug, gas tank, and air filter.

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Do any of the components depend on choices the customer makes?

Often a choice a user makes determines available options further into the configuration process. For example, if a user chooses to build a gas-powered lawn mower, s/he will not be presented with questions regarding electric motors, but will be presented with questions that only apply to gas engines.

List components that are included or excluded depending on what the user chooses in a previous question.

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How do you want to price the configured item?

The Configurator offers many options for pricing configured items, from one blanket price to components in which the inventory price is overridden or superseded. The available pricing options are dependent on the type of configuration you are using, whether it is a sales order configuration or a manufacturing order configuration.

- Straight inventory pricing--the prices of the configured items are added together for the final price

- A base price plus individual pricing for the configured items (only applicable to manufacturing orders)--if your base price comes from the configuration, determine a default price

- A blanket, or fixed (default), price that does not change no matter what components are selected.

- A combination of inventory and configuration pricing, with or without formulas.

Other things to consider:

- Do you want the system to assign an item number for the configured item (Auto), or do you want the item number to reflect some or all of the characteristics of the item (Smart ID number)?

- Will the description and additional description of the final configured item change depending on the components the user chooses?

- Are there any restrictions determined by the components the user chooses? For example, if the user chooses a small gas engine for a lawn mower, is there a limit to the size of the mower deck allowed with that engine? List restrictions as applicable.

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Planning – Stage 2

Stage 2 planning consists of laying out the options for each item the user is allowed to configure, as well as listing the items that are included but not configured by the user.

List the options the user can customize and the options available. For example, if the user can choose what type of power source for a lawn mower, the available options might be gas engine, corded electric motor, or cordless electric motor.

User can customize: **Options available**

Sample: Aquarium tank size   20 gal, 30 gal, 50 gal

List the items that are required to be included in the configured item. These should be items in which the user has no choice or option. For example, if the user configures a lawn mower, items that must be included might be wheels, a handle, and a safety switch.

Item to configure	This must be included
Sample: Aquarium	Gravel, aerator pump, tank thermometer
Sample: Lawnmower	Safety cutout switch, wheels, handle

List components that are included or excluded depending on what the user chooses in a previous question.

If user chooses this	This must be included
Sample: Aquarium – Saltwater	Hydrometer
Sample: Lawnmower – gas engine	Spark plug, gas tank, air filter

List components the user can customize depending on what the user chooses in a previous question.

If user chooses this	This can be customized
Sample: Aquarium – Saltwater	Types of saltwater fish for the aquarium
Sample: Aquarium – Freshwater	Types of freshwater fish for the aquarium
Sample: Lawnmower – gas engine	Engine size, gas tank capacity
Sample: Lawnmower – cordless electric motor	Motor size, battery capacity

Setup – Inventory Items

Before you start a new configuration, make sure all the component items that may be used in the configuration are set up as Inventory items. Verify pricing if the configuration will use inventory pricing.

Setup – Configuration Categories

Before you start a new configuration, make sure you have created the configuration categories you want to use for the configurator. Configurator categories allow you to group the configurations you create.