



Configurator



Say goodbye to searching endlessly for part numbers and hello to NAV Sales Configurator from Insight Works — a light-weight add-on for Microsoft Dynamics NAV that significantly simplifies the creation of production Bill of Materials (BOMs) and Routings, or assembly BOMs, to make quote and order generation more efficient.

With NAV Sales Configurator, it is easy to set-up and select specific options for products that you sell. Whether you assemble or produce simple items with only a few configurable options or more complex items with thousands of options, NAV Sales Configurator reduces data entry time while increasing order accuracy.

Benefits

- Perfect for companies that Make-to-Order or Assemble-to-Order
- Support for thousands of options
- Non-invasive install won't compromise your NAV infrastructure
- Automatically generate assembly and production BOMs from sales orders and quotes
- An affordable solution for any size business
- Save significant time using pre-configured items
- Reduce manual input and improve efficiency and accuracy in sales quotes and orders
- Simplify the ordering and quote process for staff

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Easily build quotes

From the sales or quote interface in Dynamics NAV, users can choose a base item to configure or select an item that has already been customized and make modifications to it. As users alter the item, the retail price is automatically calculated for easy quoting.



Automatically generate BOMs

With NAV Sales Configurator you no longer need to individually account for every item and part that goes into your products. An assembly or production BOM is generated behind-the-scenes whenever a new item is configured saving you time and increasing accuracy.



Easy-to-Use Product Designer

NAV Sales Configurator is easy to use with a simple interface to add and configure line item options. Depending on NAV permissions, anyone can create and configure options easily.



Expand with Point-of-Sale

If you're looking for a Point-of-Sale solution to work in tandem with NAV Sales Configurator, look no further than POS Insight. POS Insight from Insight Works is an add-on for Dynamics NAV that is an affordable and easy-to-use sales terminal for industries that offer counter sales.



Simple Installation

NAV Sales Configurator easily integrates with Microsoft Dynamics NAV. It is non-invasive which means it won't interfere with the on-going maintenance or upgrade of your NAV install.



Affordable Solution

You don't need to be a big shop to afford or justify NAV Sales Configurator. The Dynamics NAV add-on is an affordable solution for any size business.

The screenshot shows the 'Edit - Configurator BOM Designer' window. It features a ribbon with 'HOME' and 'ACTIONS' tabs. The 'ACTIONS' tab includes buttons for 'Create Configuration New', 'Load Existing Item Process', 'Show Item Card', 'Refresh', and 'Find'. Below the ribbon, there is a dropdown for 'Item Category' set to 'DESK'. A table lists options with columns for 'Option Description', 'Choice Code', 'Quantity per Unit', 'Variant Code', 'Description', 'Item Net Weight', and 'Line MSRP'. The table contains four rows: 'Finish' (BIRCH, 1, Birch finish, 0.00, 1.00), 'Length' (LENGTH, 7, Length, 2.30, 497.70), 'Doors' (70011, 5, Glass Door, 6.30, 327.15), and 'Shelves' (70040, 3, Drawer, 9.40, 195.90). Below the table, there are two summary boxes: 'Total Weight' (59.70) and 'Total MSRP' (1,144.75). An 'OK' button is located at the bottom right.

Option Description	Choice Code	Quantity per Unit	Variant Code	Description	Item Net Weight	Line MSRP
Finish	BIRCH	1		Birch finish	0.00	1.00
Length	LENGTH	7		Length	2.30	497.70
Doors	70011	5		Glass Door	6.30	327.15
Shelves	70040	3		Drawer	9.40	195.90

Total Weight: 59.70
Total MSRP: 1,144.75

Simple BOM designer lets users quickly and easily build configurations from quotes or orders.

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Item Category Code	Description	Data Template	Item Description Template	Number Series	BOM Type	Base Routing No.	Choices Routing No.	Default Item Dimensions
DESK	Office Desk	ITEM000004	Office Desk, {FINISH.Desc}{LENG...	ITEM-DESK	Assembly			SALES
M-BIKE	Mountain bike	ITEM000003		ITEM2	Production	1000		PROD
R-BIKE	Road Bike	ITEM000003		ITEM2	Production	1000		PROD

Define configured item categories and BOM types.

Item Category Code	Code	Description	Display Order	Mandatory	Hidden in Configurator
DESK	FINISH	Finish	1	<input type="checkbox"/>	<input type="checkbox"/>
DESK	LENGTH	Length	2	<input type="checkbox"/>	<input type="checkbox"/>
DESK	DOORS	Doors	3	<input type="checkbox"/>	<input type="checkbox"/>
DESK	SHELVES	Shelves	4	<input type="checkbox"/>	<input type="checkbox"/>

Type	No.	Code	Description	Default Quantity	Unit of Measure	Routing Link Code	Parent Choice Code	Default Choice	Maximum Quantity	Add to End	Item Description	Has Us...	Item Net Weight	Unit Price	Update Unit Price
Item	70002	70002	Top Panel	0	PCS		LENGTH	<input type="checkbox"/>	0	<input type="checkbox"/>		No	2.50	66.50	Manually
Item	70003	70003	Rear Panel	0	PCS		LENGTH	<input type="checkbox"/>	0	<input type="checkbox"/>		No	6.10	68.40	Manually
Item	70000	LENGTH	Length	6	PCS			<input type="checkbox"/>	0	<input checked="" type="checkbox"/>		Yes	2.30	71.10	When Used
Resource	LINDA	LINDA	Linda Martin	0.25	HOUR		LENGTH	<input type="checkbox"/>	0	<input type="checkbox"/>		No	0.00	28.90	When Used

Define multiple options and choices for the product. Choices can include items, text, and labor with multiple ways to control their behavior.

About Insight Works

Founded in 2008, Insight Works began as a collection of professionals with decades of combined experience developing and implementing productivity solutions. With a well rounded collective skill set, Insight Works has quickly become one of Canada's fastest growing companies by putting our customers' success above all else.

Put Our Domain Expertise To Work For You

Insight Works has extensive experience developing productivity solutions for clients in the manufacturing and distribution industries. It's what we know and what we do well. Based on our experience and industry feedback, we have developed a collection of add-ons for Microsoft Dynamics NAV that promote operational efficiency from the shop floor to the boardroom.

We've Been There

Because we've been on both sides of the implementation experience, we understand the unique needs of all users. At Insight Works, our "shop floor to the top floor" approach is what makes our employees and our products so responsive.



Gold Certified

We're proud to uphold the strict standards that the Microsoft Gold ERP Certification requires as it speaks to our ability to develop world-class products that make a positive impact for our clients.

Gold

Microsoft Partner



Always Up To Date

As Microsoft NAV evolves, so do our products. You and your clients can be sure that you're working with up-to-the-minute tools that reflect the most current ERP technology.



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