Custom Build Assemblies

Custom Build Assemblies builds on the Bill of Materials module to provide additional functionality to manage sales of products involving configuration options.

Examples of typical applications include:

Furniture - a Custom Build would allow for selection from a range of arms, castors and fabric options for a chair or, for a desk, drawer and colour.

Technology - a custom build can cover all of the options for specialist equipment such as large printers and copiers or for simpler option lists such as defining the appropriate docking stations, cases and warranties for specific notebooks.

By ensuring that all of the options are defined within the Custom Build Assembly, the sales process not only becomes more efficient (because the sales person can take the client through the options one by one) but safeguards are introduced to ensure that up-sell options are offered and not overlooked.

Each set of options within a Custom Build Assembly may be optional or mandatory - you can also specify the maximum and minimum quantities that are to be added to the order.

Within each set of options, individual options may be flagged as exclusive - these may not be added along with other options from the same set. Costs may be associated with individual options, or they may be free of charge.

For example, a Custom Build Assembly for a chair might have an option to choose the colour. This would be mandatory (you have to choose a colour) - red, blue and black might be zero cost options whilst black leather would carry an additional cost.
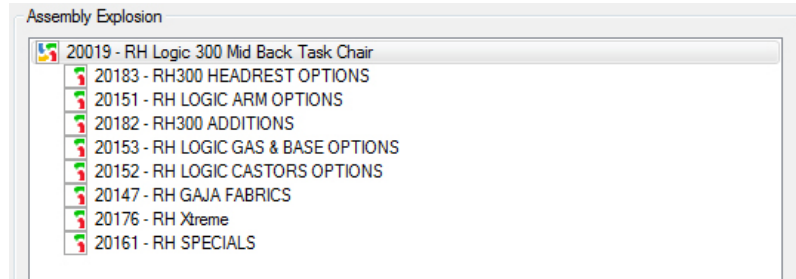
Example - RH 300 Chair

This chair can have a number of options, including various castors, arms and headrests. When adding a chair to a Sales Order or Quotation, an additional dialog is displayed:

The left-hand panel shows the options:

whilst the right-hand panel shows the options that have been, or need to, chosen:

A number of options (such as head rest and arms) are optional, as indicated by a minimum quantity of 0; the maximimum quantity is 1 since you cannot, for example, choose more than one headrest option.

Other options (base, castor and fabric) are mandatory, indicated by a minimum quantity of 1. The maximum quantity is again 1 so you cannot choose more than one fabric, base or castor. These are initially shown in red to indicate the options are still to be selected before the chair can be added to the sales order.

Selecting one of the sets of options from the right-hand panel produces the list of possible options from the Custom Build:

Here, the operator has selected the set of headrest options. Note that each of the the individual options are exclusive, ensuring that only one headrest can be selected.