

axis diplomat 2016 Modules

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.

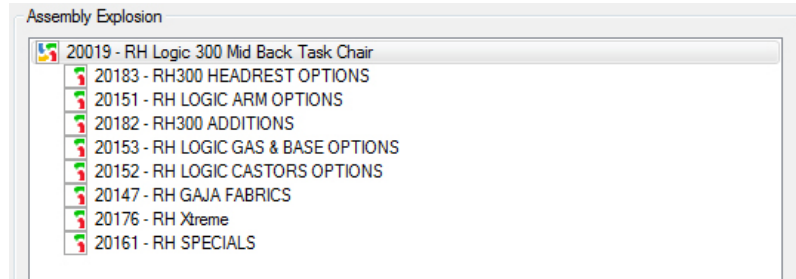
Example - RH 300 Chair

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:

Assembly Type	Stock Reference	Description	Min. Qty	Max. Qty	Multiple Qty	Exclusive	Quantity Ordered	Unit
Options	20183	RH300 HEADREST OPTIONS	0	1	1		0	
Options	20151	RH LOGIC ARM OPTIONS	0	1	1		0	
Options	20182	RH300 ADDITIONS	0	1	1		0	
Options	20153	RH LOGIC GAS & BASE OPTIONS	1	1	1	X	0	
Options	20152	RH LOGIC CASTORS OPTIONS	1	1	1	X	0	
Options	20147	RH GAJA FABRICS	1	1	1	X	0	
Options	20176	RH Xtreme	0	1	1		0	
Options	20161	RH SPECIALS	0	5	1		0	

Example - RH 300 Chair (continued)

The left-hand panel shows the options:



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

Assembly Type	Stock Reference	Description	Min. Qty	Max. Qty	Multiple Qty	Exclusive	Quantity Ordered
Options	20183	RH300 HEADREST OPTIONS	0	1	1		0
Options	20151	RH LOGIC ARM OPTIONS	0	1	1		0
Options	20182	RH300 ADDITIONS	0	1	1		0
Options	20153	RH LOGIC GAS & BASE OPTIONS	1	1	1		X 0
Options	20152	RH LOGIC CASTORS OPTIONS	1	1	1		X 0
Options	20147	RH GAJA FABRICS	1	1	1		X 0
Options	20176	RH Xtreme	0	1	1		0
Options	20161	RH SPECIALS	0	5	1		0

A number of options (such as head rest and arms) are optional, as indicated by a minimum quantity of 0; the maximum 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:

Assembly Type	Stock Reference	Description	Min. Qty	Max. Qty	Multiple Qty	Exclusive	Quantity Ordered
	19994	Neckrest	0	0	1	✓	1
	19995	Neckrest (Leather)	0	0	1	✓	0
	19996	Neckrest Cassette	0	0	1	✓	0

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.

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