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SPECIALISTS IN MANUFACTURING AND DISTRIBUTION

Sales Order Configurator

Configuration order entry is an effective tool that allows the user to enter custom-configured line items on sales orders. Selecting from a list of available features and options does this. Configuration order entry also allows for the creation of a manufacturing work order directly from the sales order item. A history of all configurations shipped is maintained by the system.

Order entry configuration is best described by the following terms:

- Model — a marketing product that is available for sale
- Feature — a grouping of model options
- Option — a product choice that is available to the customer
- Sales Kits---A group of (usually loose) parts that are sold as a single package

Model

Every Model corresponds to one and only one manufacturing part number. Models may be thought of as marketing's version of the manufacturing part number.

A manufacturing part number may refer to any number of models.

Each model may be defined as configurable or non-configurable. Configurable models may be assigned features and options. Non-configurable models may only be used as saleable items in place of inventory part numbers or in proposals and sales orders.

A sales kit is basically a configurable model (although the user may elect to assign the kit options directly to the model without intervening features).

Feature

When a Feature is assigned to a model, you must specify whether that feature is “required” or “optional.” A feature may also be specified as being “mutually exclusive.” This means that one and only one valid option may be assigned under that feature.

Option

Options may be standard or non-standard. An option may be defined as either an inventory item (part number), or as a manufacturing process. Any previously defined inventory item (or manufacturing operation) may be used in a configuration as an option – but when assigning options, the user will have the ability to use a previously defined alias as the option name. In the example below, the actual manufacturing part number of a 4 cylinder engine might be ‘abcd-4’ but an alias can be assigned to the manufacturing part number that will enable an option called ‘4cyl’ to be used in place of the manufacturing part number.

Sales Kit

A sales kit requires a basic model definition but will be given a ‘Sales Kit’ type code rather than the ‘Configured Assembly’ type code as in the ‘Model / Feature / Option’ structure described above. A configuration must be defined as either a configured assembly or a sales kit. The primary difference between the sales kit and the configured assembly is in the transaction process. When shipping a configured assembly, a single transaction will be created to define the configured assembly shipment. The shipment of a sales kit will create a transaction for each item in the sales kit. The actual sales kit item will not be transacted although, the sales kit part number will be referenced in the individual sales kit transactions.