

clever DYNAMICS

FACT SHEET

Clever Configure to Order

Turn complex, made-to-order products into fast, accurate quotes and right-first-time manufacturing orders

cleverdynamics.com/clever-configure-to-order

Clever Configure to Order

Turn complex, made-to-order products into fast, accurate quotes and right-first-time manufacturing orders.

Do you sell products that can be built in hundreds of different ways?

Are your sales team relying on spreadsheets, product experts or guesswork to price a configured item - only for errors to creep in, quotes to take too long, and the wrong components or operations to end up on the shop floor?

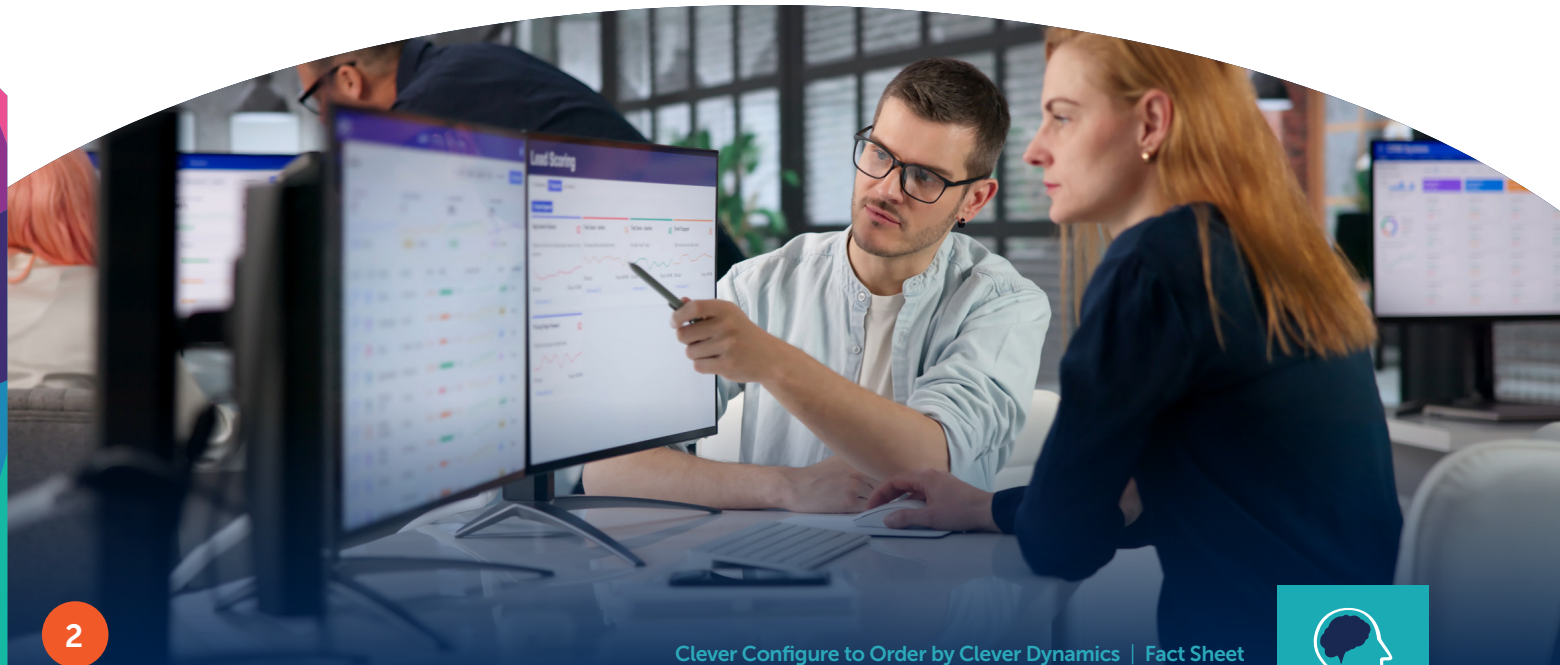
Clever Configure to Order for Dynamics 365 Business Central lets you capture your product knowledge once and then reuse it every time you sell. It guides your sales team through a simple, step-by-step configuration of even the most complex products, calculates an accurate price as they go and automatically creates the correct assembly or production order - so what the customer ordered is exactly what gets made. Set up your rules once and let Business Central do the hard work every time.

Benefits

- **Quote complex products in minutes, not days –** guided workflows let any salesperson configure the most complicated product accurately.
- **Always-accurate, profitable pricing** – parameters and real-time calculations price every configuration consistently, with no manual maths.
- **Right-first-time manufacturing** – confirmed configurations automatically create the correct assembly or production order.
- **Allow personalised products** – personalise products with custom text, engraving and images, controlled by masks and rules.
- **Nothing lost between sales and the shop floor** – notes, parameters and customisation flow straight through to orders and posted documents.
- **Clear specifications for everyone** – professional specification documents and summaries cut confusion and disputes.
- **Complete traceability in one system** – built natively in Business Central, keeping everything connected from quote to despatch.
- **Set up once, reuse forever** – capture product knowledge in reusable models that scale across your range and are easy to maintain.

Requirements

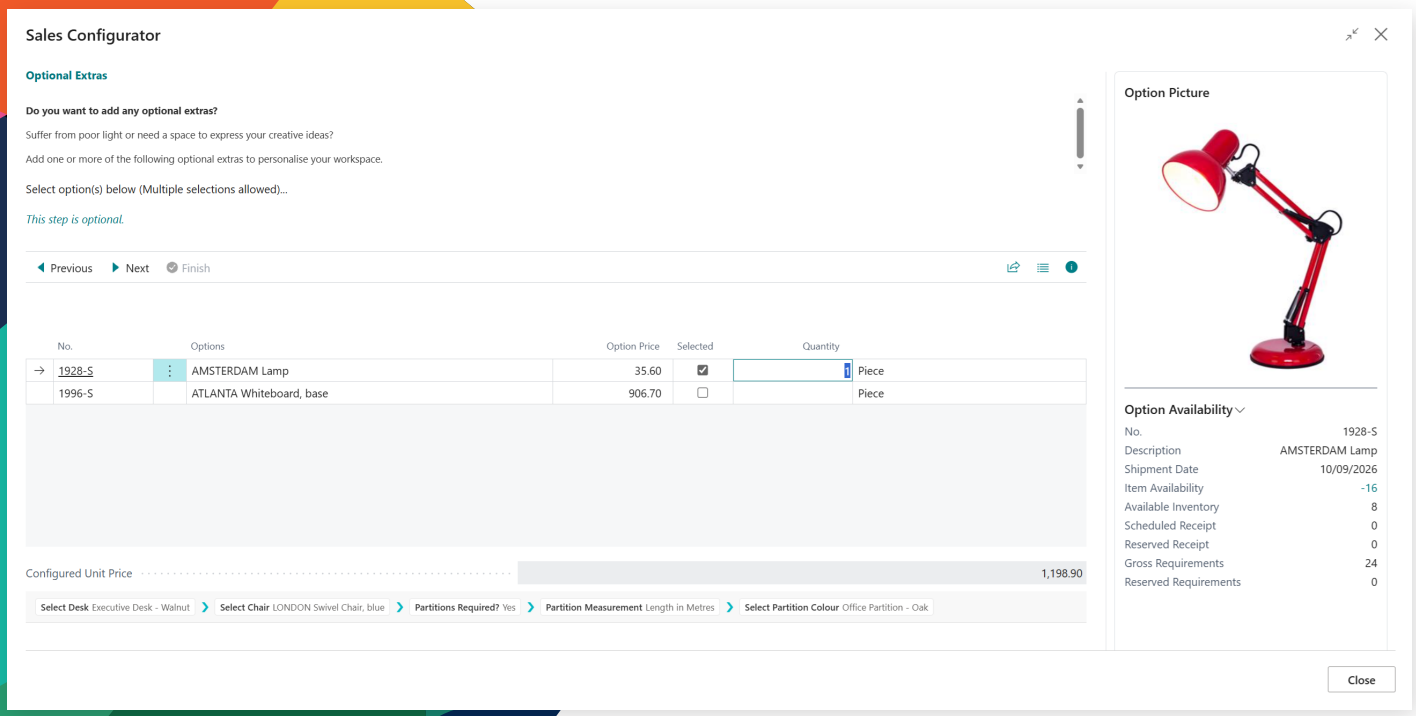
Dynamics 365 Business Central



Everything you need to sell and make configured products:

Guided configuration workflows

Model your products as easy-to-follow workflows made up of steps and options. Your sales team simply works through the questions on screen and Clever Configure to Order builds the specification for them - no product expertise required. Steps can offer single or multiple choices, show help text and images and only present the options that are valid, so every configuration is complete and correct before it reaches a quote..



Accurate pricing, parameters and calculations

Drive prices, quantities and component selections from the choices your customer makes. Capture parameters such as dimensions or capacities and use the built-in formula builder to turn them into real-time calculations - component quantities, routing times, setup costs and pricing all update automatically as the configuration changes. Every quote is priced consistently and profitably, with no manual maths and no nasty surprises later.

Personalised Products

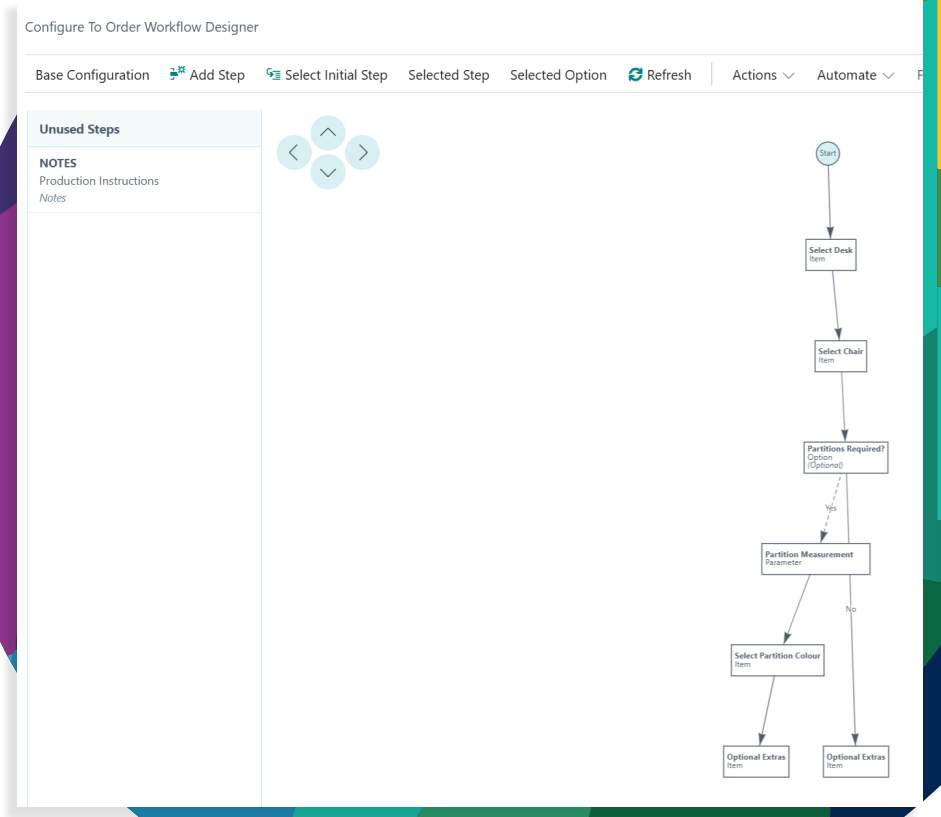
Let customers personalise their products with free-text engraving, monogramming or custom messages, with character masks and rules to keep entries within what you can actually produce. Attach images and reference pictures so everyone - sales, production and the customer - can see exactly what has been specified.

Configuration notes

Capture important notes at any point during configuration and carry them straight through to the resulting assembly and production orders. Multiple notes are brought together automatically and displayed with their formatting intact, so the people making the product always have the full picture - nothing gets lost between the quote and the shop floor.

Straight-through to assembly and production

Once a configured line is confirmed, Clever Configure to Order automatically generates the matching Business Central assembly order or production order, complete with the right components, routings, customisation details, parameters and notes. Configuration detail flows through order status changes and into the posted documents, giving you a complete, connected record from quote to despatch.





Clear specifications and summaries

Produce professional customer specification documents and on-screen configuration summaries for quotes, orders, archived documents, posted invoices and shipments. Everyone sees a clear, readable breakdown in Business Central of exactly what was configured, priced and built - improving communication and cutting disputes.



Sell smarter, make it right, keep everything in one place

Because it is built natively inside Dynamics 365 Business Central, all of your configuration rules, quotes, customisation, notes and manufacturing orders live in one system - fully connected and completely traceable. Your sales team quotes faster and with confidence, your production team builds exactly what was sold and your customers get precisely what they ordered. Less rework, less waste, faster quotes and happier customers.

Ready to make complex product configuration simple?

Talk to us today to see how Clever Configure to Order for Business Central can help you quote faster, reduce errors and make sure every order is right first time.



clever DYNAMICS

FACT SHEET

Clever Configure to Order

Turn complex, made-to-order products into fast, accurate quotes and right-first-time manufacturing orders

cleverdynamics.com/clever-configure-to-order