INSIGHT WORKS

PRODUCT CONFIGURATOR

for Microsoft Dynamics 365 Business Central

★★★★★ **4.9 on Microsoft Marketplace** · **Over 1,000 Installs**

SIMPLIFY CREATING BOMS AND ROUTING TO MAKE QUOTE AND ORDER GENERATION MORE EFFICIENT.

Option choices on a sales quote or order become a real Business Central item, with its own production or assembly BOM and routing.

Product Configurator is Insight Works' configurator extension for Business Central. A salesperson picks options on a quote or order line, and the app creates or finds the item, builds its production or assembly BOM, copies and adjusts its routing, and puts it on the sales line. What comes out is ordinary Business Central master data, so planning, costing, and scheduling treat a configured item like any other.

Why it holds up

Ordinary items, nothing extra downstream. A configured item is a real Business Central item with a production or assembly BOM and, for production items, its own routing, so the planning worksheet, MRP, and MPS handle it with no integration work.

A few choices, a full bill of materials. The person taking the order answers the option list and the app builds the BOM and routing, so order entry never touches a BOM by hand.

One configuration master, not hundreds of BOMs. Engineering maintains options and choices centrally instead of keeping near-identical BOMs in sync. A changed choice applies to new configurations; ones already used keep what they had.

Quotes that don't flood the item master. A quoting item reuses one base item and stores the detail against a Configuration ID, and a real item number is created when the quote becomes an order. Identical configurations resolve to the existing item.

Rules are configured, not coded. The Rule Builder is a point-and-click page of conditions and actions that can hide a choice, set a value, or raise an error. AL and the API stay available for those who prefer code.

Honest about the effort. Configurators take real setup work, and that work falls on whoever owns the product data. Insight Works trains the team on setup, the Rule Builder, and formulas, and supports it; it does not build the configurations for you.

Who's on it

Sales & customer service reps

Answer the option list on a call or quote and save the line. They never see the BOM.

Production planners & engineers

Receive a complete production BOM and routing, on a real item that MRP already understands.

Product managers

Define the item categories, options, choices, and rules. This role carries the setup effort.

Make-to-order & engineer-to-order manufacturers

Replace a spreadsheet or a single expert's knowledge with a maintained configuration master.

Business Central partners & consultants

Scope the configuration work, run the setup, and train the product owners.

Free to install and evaluate. Product Configurator installs at no cost from Microsoft Marketplace, so you can try it in a sandbox before committing to production. Plan the configuration work first; setup takes real effort up front.

Backed by over 800 resellers. Insight Works works through a global network of more than 800 Business Central resellers who can help consult, implement, and support a deployment. **See the Insight Works reseller directory**.

PRODUCT CONFIGURATOR for Microsoft Dynamics 365 Business Central

CONFIGURING ON A QUOTE OR ORDER

- Launch from a sales quote or order, tied to the sales line, or from the menu; mandatory options show in bold green when answered and bold italic red when not
- The selling amount builds live from each choice; cost and weight calculate from the selected options, including routing labor, with a standard cost setting on generated items
- Load Existing Item and Load Previously Quoted Configurations support reorders and edits

ITEM CATEGORIES, OPTIONS & CHOICES

- Item categories hold options, which hold option choices; each category sets its number series, data template, BOM type (production or assembly), and base routing
- Choice types: item, production BOM, resource, operation, text, routing, or sub-configuration, each with a unit amount, quantity limits, and child components or labor; a non-item choice, such as a finish, can still drive components
- Reusable choice sets, Copy Configurator Item Category, and Check Configuration to catch setup errors early

BOMS, ROUTINGS & QUANTITIES

- Production BOM plus an item-specific routing, or an assembly BOM, set per category
- Routing run times calculate from configuration values; an operation on a chosen option overwrites the matching base operation
- Child quantity formulas driven by any option value, for example **Length * 1.1**; Scrap % on item choices
- Sub-configurations roll up, and child formulas reach a parent value with a Parent prefix

RULES, COMBINATIONS & FORMULAS

- Rule Builder: four group types, eleven comparison operators, and actions that include error, message, hide or show an option or choice, set a value, run another rule, and a yes or no prompt; rules set choices and quantities, not amounts
- Choice Combinations handle include and exclude behavior; a shared expression evaluator provides a documented function library (rounding, trigonometry, min and max, powers, conditional logic)

QUOTING ITEMS, BULK ENTRY & OUTPUT

- Quoting items convert to a real item on order, automatically or by prompt
- Bulk Configuration Builder enters several variants of one category on a single document; item attributes and images can be generated from choices

BUSINESS CENTRAL LICENSING

- Subscription, licensed per company with no user limit
- Supports Essential, Premium, and Team Member Business Central licenses
- Free to install and evaluate from Microsoft Marketplace; evaluation typically happens in a sandbox before production

INTEGRATION & INSTALLATION

- Installs from Microsoft Marketplace like any other Business Central extension; works with standard Business Central MPS and MRP
- Setup order: item categories, options, choices, combinations or rules, then Check Configuration
- The customer builds the configurations; Insight Works trains on setup, the Rule Builder, and formulas, and product support is part of the subscription

REQUIREMENTS & COMPATIBILITY

- Business Central Cloud or On-Premises
- Languages: Danish, English, Estonian, Finnish, French, German, Icelandic, Italian, Norwegian, Spanish, and Swedish
- Entry points are sales quotes and orders, not purchase documents

WHERE IT STOPS

- No web or customer-facing configuration interface out of the box; an API exists for a front end the customer builds
- Changing a choice does not update configurations already used; changing a routing's setup time requires an extension
- Does not create item variants of the configured item; a quoting item needs its production or assembly order created manually
- Customer-specific selling amounts and line discounts are not documented as part of the configured amount

SUPPORT & RESOURCES

- Knowledge base at kb.dmsiworks.com: configurations, item categories, options, option choices, BOMs, the Rule Builder, the expression evaluator, and release notes
- Documented AL events and public procedures for partners extending the app

DATA & PORTABILITY

- Output is standard Business Central items, BOMs, and routings, so nothing downstream depends on the configurator
- Quoting items store configuration detail against a Configuration ID on a single reusable base item

ALSO FROM INSIGHT WORKS

Insight Works builds 30+ apps for Microsoft Dynamics 365 Business Central, concentrated in these areas of manufacturing and distribution. If Business Central has a gap, there's a good chance we already have a solution.

Warehouse & Inventory Management
Barcode-driven receiving, put-away, picking, cycle counting, and license plate handling.

Shipping & Fulfillment
Carrier rate shopping, pick-to-ship execution, and shipment tracking.

Quality Control & Compliance
Inspections, test management, and quality documentation.

Production Planning & Scheduling
Capacity-aware scheduling, planning worksheets, and demand forecasting.

Shop Floor Execution & Maintenance
Shop floor data capture, machine maintenance, and production analysis.

Point of Sale & Data Tools
Counter sales, document attachment, label printing, and bulk data import/export.

See all Insight Works apps for Business Central

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INSIGHT WORKS

North America
Suite #102, 5661 99 Street NW
Edmonton, Alberta
Canada T6E 3N8

Europe
Kingsfordweg 151
1043 GR Amsterdam
The Netherlands

www.insight-works.com
info@insight-works.com

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