

Configurator

Can your products be built or packaged in a variety of ways? Do your service offerings contain configurations that affect other options? Then Traverse Configurator is for you. Configurator helps you create prompted rules and constraint-based workflow processes for the entry of the following types of transactions:

- Sales Orders
- Manufactured Orders
- Service Repair Jobs
- Service Director Service Orders, Work Orders, and Quotes

Configurator guides your users through the configuration process by asking simple questions based on rules and constraints set up for the items and services being ordered. Once completed and approved, Traverse creates new sales order line items and, if applicable, new item IDs, bills of material, and production orders.

Let Configurator simplify your sales, ordering, and repair processes

Enter complex orders with minimal training

Configurator walks you through the order entry process presenting options that help ensure that products ordered can actually be assembled.

No need to set up item IDs and Bill of Materials

Configurator will automatically create a custom Item ID and BOM for the product you are assembling rather than having pre-built items and bills for every possible combination you might sell.

Specific pricing

Custom pricing can be set up based on options selected and formulas associated with pre-defined rules.

Customer-specific configurations

Pricing, parts, and assembly options can be set up specific to an individual customer's needs.

Upsell options

Use Configurator to present order entry operators optional items to sell based on a customer's order.

Capture quality control information

Using our optional mobile technology, capture QC items when providing service - either in your shop or out with customers. You can also use Configurator to provide checklists, PDF documents, pictures, and videos to your techs ensuring the work gets done right.