

This document provides a high level description of the integration between BuyDesign and Microsoft Dynamics NAV. The primary focus of this document is how products (items) can be configured by integrating the BuyDesign Configurator within NAV, and how orders can be passed directly into NAV from BuyDesign Channel Sales, a web based guided selling, quoting and ordering system.

## BuyDesign Configurator –Dynamics NAV integration

- Items marked configurable can be configured from Quotes, Orders, Blanket Orders, Manual and Simulated Production Orders within NAV.
- General configuration capabilities from the sales document subset listed above (quotes, orders, blanket orders) include:
  - Configure items interactively
  - Re-configure or change options of previously configured lines
  - Configure or re-configure a batch of lines without invoking the interactive user experience
  - Copy configured lines within the same document, including all configured options
  - Copy configured lines from other documents into the current document including all configured lines
  - Delete configured lines resulting in the deletion of all configured options
  - Quick preview of BOM/Routings generated from within sales documents (depending upon implementation settings)
  - Reports to view Configuration selections, price details and order details
  - Archive quotes with configured lines and restore archived versions
  - Generate configured pricing and discounts and enable overrides through settings, or use standard NAV pricing logic directly or as a starting point.
  - Based upon user selections, production and shipping locations may be selected and set by the configurator.
  - Foreign trade support enables user to enter orders in multiple currencies
  - Ability to associate configuration profiles to different users within NAV and authorize a set of profiles to the NAV user account provides the ability to control the configuration experience by user-profile combinations.
- Leveraging NAV variant codes with configuration
  - Configurator can generate variant codes and descriptions based upon user selections
  - Variants generated by the Configurator and not in NAV are automatically created in NAV for future use.
  - If variant exists in NAV, it is automatically selected on the configured line.
  - If variant code is typed in as part of the line, it is passed as input to the Configurator for the model developer to use in defaulting choices/options to speed selection process.

- Leveraging Charge Items on Sales documents
  - Configurator can generate charge item lines based upon user selections
  - Charge item lines are automatically added to the order upon completion of configuration and assigned to the configured line.
  - Re-configuring, copying, or deleting configured lines with assigned charge items also impacts the assigned charge items to maintain the association with the configured lines
- Production Orders
  - Can be created from sales orders, Order Planning, Planning Worksheet, or directly in manual or simulated production orders
  - BOMs/Routings are dynamically generated by the configurator
  - Items in the dynamic BOMs that have NAV BOM Routing numbers have the NAV defined BOM/Routings automatically merged into the overall finished good BOM/Routing
  - Routing comments can be specified dynamically as part of the dynamic routing generation
  - Item and Project orders are supported
  - Refresh and Re-configure and refresh capability is provided to update the BOM/Routings on a production order either to the “as configured last” state, or re-execute the configurator in silent mode to update the configured BOM/Routings and then refresh production orders
  - NAV replenishment codes and manufacturing policies are interpreted for items on the production order to appropriately add sub-assemblies or generate work orders for Make-to-stock items
- Kitting support is provided in the North American version
  - Kit items can have kit BOMs dynamically generated by the configurator
  - Dynamic Kit BOMs can include
    - items of type item, setup resource, or resources
    - items for assembly or disassembly or both
  - Kitting can be used with Business Essentials for light manufacturing or in conjunction with advanced manufacturing to augment full BOM/Routing management

## BuyDesign Channel Sales – Microsoft Dynamics NAV Integration

- Orders placed by distributors, dealers, and direct sales staff through BuyDesign Channel Sales (web based guided selling, quoting and ordering system) are automatically imported into Dynamics NAV
- Orders passed into NAV can be managed within NAV, including change management for configured options.
- Orders delivered into NAV can be converted into production orders for processing, using dynamically generated BOMs/Routings within the BuyDesign Configurator, NAV static BOMs/Routings or a combination of both.
- Imported orders support
  - Configured and non-configured line
  - Definition of header terms; e.g. payment, freight
  - Specification of the currency for selection in the foreign trade tab
  - Link associations for charge items
  - Validating configurations on incoming orders in batch mode before instantiating the order in NAV
  - Settings to control policies on price, discounts for incoming orders
  - And more
- Incoming orders can be placed in open or released status. If pre-payment or approval workflows are setup in Dynamics NAV, these are considered for incoming orders
- Graceful error recovery mechanisms for imported orders are provided
  - Error messages for header and lines are clearly displayed
  - Errors can be corrected from within NAV to expeditiously move the order through the system
- Links to the external order are provided through the NAV External Document Number field

This document describes some of the new functionality provided within Dynamics NAV through the integration of the BuyDesign Configurator and BuyDesign Channel Sales.

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