SALESPAD®
BY CAVALLO

CONFIGURATOR

Meet every customer need

Gain More Flexibility

Do you have a lot of variation among your products and want an automated solution to simplify your order management process? Create configurable items according to customer specifications upon ordering with SalesPad® Configurator. This configuring capability minimizes time spent entering orders, with options for users to craft configurations of varying complexity, depending on the needs of your business.

Configurator in Action

Create configurations that allow you to enter customer orders with ease. Select from a list of options for each item according to customer specifications, and the selections will be saved to that sales line for easy reference. This tool allows for full visibility of each available configuration per item, as well as the ability to test the configurations without placing an actual order.

Pair Configurator with the SalesPad Manufacturing module as well to accommodate configurations for products that are built or assembled.

Key Features

- Create new item configurations with types of MBOM, DBOM, Kit, and Package

- Set up options for all needed configuration possibilities, including descriptions, lengths, dropdown selections, and component items, with reference images

- Add configurable items as options for existing configurations (e.g. nested BOMs)

- Set up restrictions that dynamically remove options based on the selections made

- Calculate pricing based on the final selection combination, or by summing component list prices, or set up custom configurator prices for individual selections or more advanced calculation rules

- Import, export, and search open configurations

- View historical configurations and restore them to active

- Add configured items to a sales document by making selections, and see the component items and pricing automatically update as you go

"SalesPad® has saved us an unquantifiable amount... The fact that we've been able to customize it so much has been priceless—and it's been a huge factor in our growth as a company."

- Jason Jasperson, Executive VP at National Band Saw