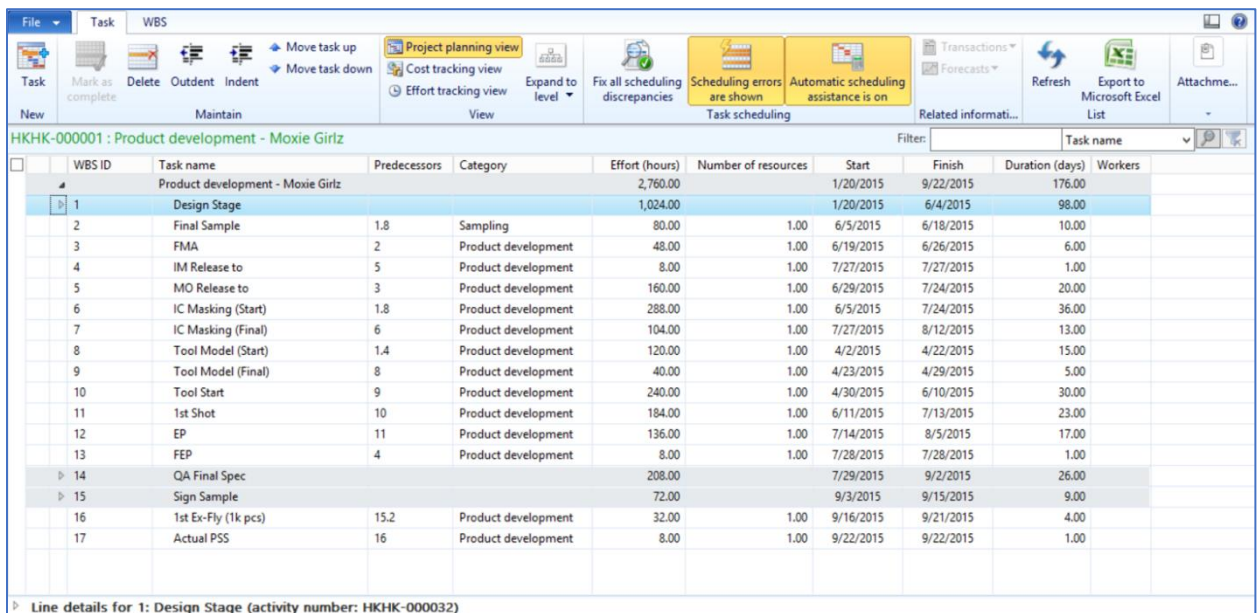


Product Management with Microsoft Dynamics 365

1. Product Lifecycle Management with Microsoft Dynamics 365 Supply Chain Management ERP –

Microsoft Dynamics 365 for Supply Chain Management provides a great foundation for customers with its Product Information Management (PIM) capabilities to get light Product Lifecycle Management (PLM) capabilities for a business. While some customers will need specialized PLM software many light manufacturers and assemblers may find the integrated functionality built into Microsoft Dynamics 365 for Supply Chain Management ERP sufficient to manage their business.

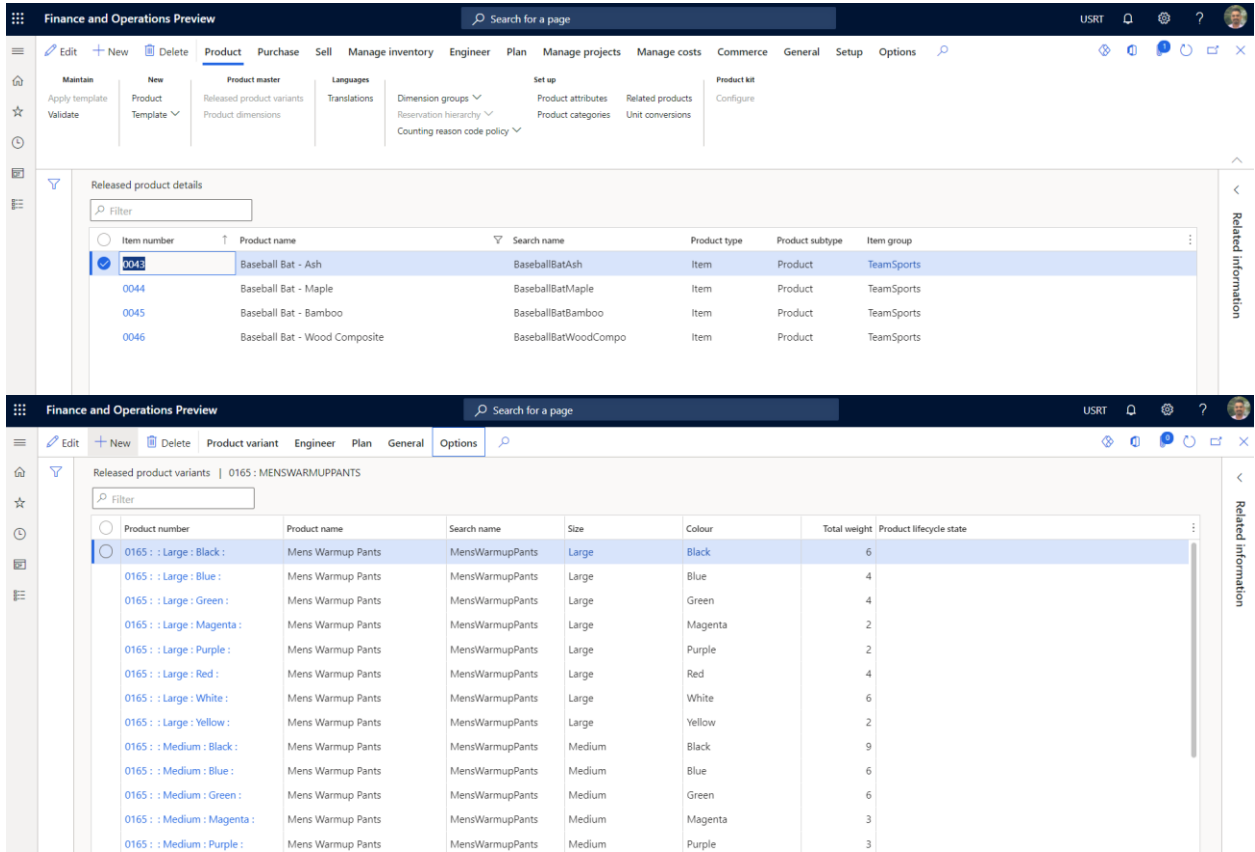
Product Development and Planning: Microsoft Dynamics 365 provides the ability to build a complete product development plan from ideation, prototyping, modeling, tooling, product manufacturing to product release. Product development and planning can be carried out using Project management features in Microsoft Dynamics 365 for Finance which is tightly integrated with Supply Chain Management.



WBS ID	Task name	Predecessors	Category	Effort (hours)	Number of resources	Start	Finish	Duration (days)	Workers
1	Design Stage			1,024.00		1/20/2015	9/22/2015	176.00	
2	Final Sample	1.8	Sampling	80.00	1.00	6/5/2015	6/18/2015	10.00	
3	FMA	2	Product development	48.00	1.00	6/19/2015	6/26/2015	6.00	
4	IM Release to	5	Product development	8.00	1.00	7/27/2015	7/27/2015	1.00	
5	MO Release to	3	Product development	160.00	1.00	6/29/2015	7/24/2015	20.00	
6	IC Masking (Start)	1.8	Product development	288.00	1.00	6/5/2015	7/24/2015	36.00	
7	IC Masking (Final)	6	Product development	104.00	1.00	7/27/2015	8/12/2015	13.00	
8	Tool Model (Start)	1.4	Product development	120.00	1.00	4/2/2015	4/22/2015	15.00	
9	Tool Model (Final)	8	Product development	40.00	1.00	4/23/2015	4/29/2015	5.00	
10	Tool Start	9	Product development	240.00	1.00	4/30/2015	6/10/2015	30.00	
11	1st Shot	10	Product development	184.00	1.00	6/11/2015	7/13/2015	23.00	
12	EP	11	Product development	136.00	1.00	7/14/2015	8/5/2015	17.00	
13	FEP	4	Product development	8.00	1.00	7/28/2015	7/28/2015	1.00	
14	QA Final Spec			208.00		7/29/2015	9/2/2015	26.00	
15	Sign Sample			72.00		9/3/2015	9/15/2015	9.00	
16	1st Ex-Fly (1k pcs)	15.2	Product development	32.00	1.00	9/16/2015	9/21/2015	4.00	
17	Actual PSS	16	Product development	8.00	1.00	9/22/2015	9/22/2015	1.00	

Product development planning can be done within Microsoft Dynamics 365 using its Project Management features. Planning can be at a summary level or detailed level.

Product Mastering: Microsoft Dynamics 365 for Supply Chain Management supports a global product master that is common across companies. The product can have multiple product attributes and when released to a company takes on an item number. Items can have multiple Item variants through the use of product dimensions such as Configuration, Size, Style and Color. The Item variants could be considered the equivalent of a Stock Keeping Unit (SKU).



The screenshot displays the 'Released product details' table in Microsoft Dynamics 365 Finance and Operations. The table lists products with columns for Item number, Product name, Search name, Product type, Product subtype, and Item group. The first product is 'Baseball Bat - Ash' (Item 0043). Below this, a section for 'Released product variants' for '0165 : MENS WARMUP PANTS' is shown, listing various size and color combinations (e.g., Large Black, Medium Blue) with their respective search names, sizes, colors, and total weights.

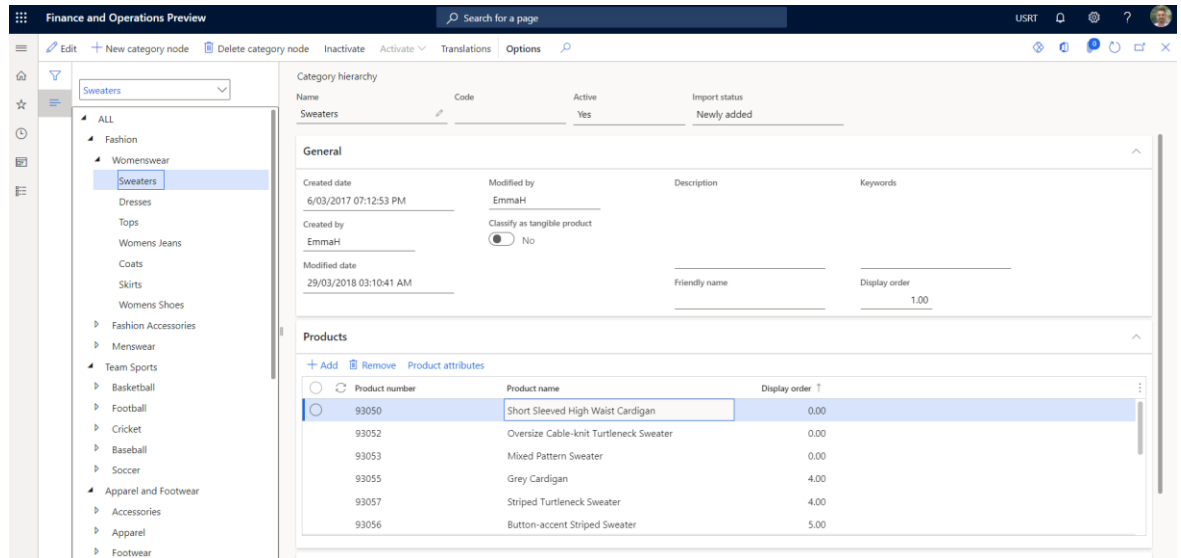
Item number	Product name	Search name	Product type	Product subtype	Item group
0043	Baseball Bat - Ash	BaseballBatAsh	Item	Product	TeamSports
0044	Baseball Bat - Maple	BaseballBatMaple	Item	Product	TeamSports
0045	Baseball Bat - Bamboo	BaseballBatBamboo	Item	Product	TeamSports
0046	Baseball Bat - Wood Composite	BaseballBatWoodCompo	Item	Product	TeamSports

Product number	Product name	Search name	Size	Colour	Total weight	Product lifecycle state
0165 : Large : Black :	Mens Warmup Pants	MensWarmupPants	Large	Black	6	
0165 : Large : Blue :	Mens Warmup Pants	MensWarmupPants	Large	Blue	4	
0165 : Large : Green :	Mens Warmup Pants	MensWarmupPants	Large	Green	4	
0165 : Large : Magenta :	Mens Warmup Pants	MensWarmupPants	Large	Magenta	2	
0165 : Large : Purple :	Mens Warmup Pants	MensWarmupPants	Large	Purple	2	
0165 : Large : Red :	Mens Warmup Pants	MensWarmupPants	Large	Red	4	
0165 : Large : White :	Mens Warmup Pants	MensWarmupPants	Large	White	6	
0165 : Large : Yellow :	Mens Warmup Pants	MensWarmupPants	Large	Yellow	2	
0165 : Medium : Black :	Mens Warmup Pants	MensWarmupPants	Medium	Black	9	
0165 : Medium : Blue :	Mens Warmup Pants	MensWarmupPants	Medium	Blue	6	
0165 : Medium : Green :	Mens Warmup Pants	MensWarmupPants	Medium	Green	6	
0165 : Medium : Magenta :	Mens Warmup Pants	MensWarmupPants	Medium	Magenta	3	
0165 : Medium : Purple :	Mens Warmup Pants	MensWarmupPants	Medium	Purple	3	

Product Dimensions within Microsoft Dynamics 365 such as Size, Style and Color help make the product master manageable

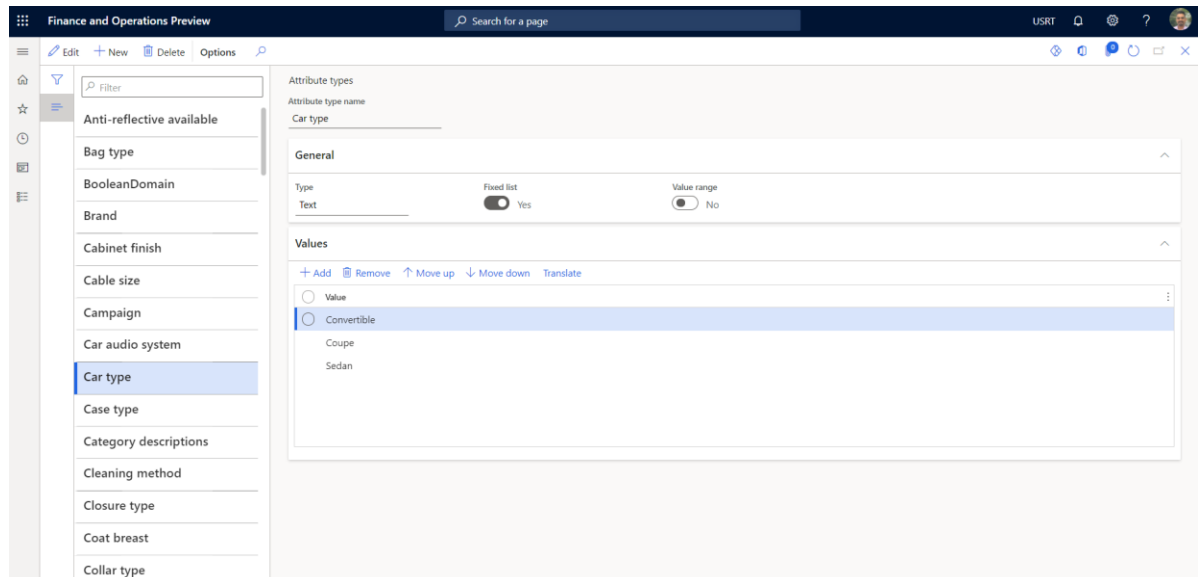
2. Merchandising with Microsoft Dynamics 365 Supply Chain Management ERP –. Microsoft Dynamics 365 merchandising tools allow businesses to manage products and attributes globally and locally, as well as create unlimited categories for enhanced category and assortment management. Effective planning and merchandise management is critical for gaining and maintaining market leadership. Microsoft Dynamics 365 provides the tools to improve the speed of doing business so they can stay one step ahead in the market. Merchandising management in Microsoft Dynamics 365 involves -

- **Category and product management** – Define product hierarchy using the category hierarchy feature in Microsoft Dynamics 365. Define category hierarchies to group and categorize the products that business wants to distribute to its channels. Multiple category hierarchies can be defined, and each product can be assigned to multiple hierarchies.



Category Hierarchy in Microsoft Dynamics 365

- **Product attributes** – Attributes in Microsoft Dynamics 365 provide a way to further describe a product and its characteristics through user-defined fields (such as **Memory size**, **Hard disk capacity**, **Is Energy star compliant**, and so on). Attributes can be associated with various entities, such as product categories and channels, and default values can be set for them.



Product attribute types in Microsoft Dynamics 365

3. Pricing with Microsoft Dynamics 365 Supply Chain Management ERP – Price management is the most effective way to manage the balance between financial risk and revenue. It is managing product pricing, being able to identify upsell or cross opportunities, and preventing margin erosion with ease. However, attempting price management with internally developed spreadsheets and database tools will no longer provide a competitive edge for your business. Price management in Microsoft Dynamics 365 provides organizations with the ability to handle more complexity in their pricing. It gives you the power to use a combination of discount-based components, such as dollar or percentage off based on volume breaks or total spend, and upcharge components like freight charges. With pre-planned price discounts already entered and setup in Microsoft Dynamics 365, a Salesperson no longer have to rely on remembering what discounts are available and when they can apply them. Trade agreements or price management function in Microsoft Dynamics 365 also reduces the amount of time that the team spends on pricing administration. Any changes to your pricing rules or promotional and customer pricing, can be made quickly and are applied immediately using the data management function of export and import while the team simultaneously can work on other things when the pricing sheets are getting imported. Trade agreements/Price management in Microsoft Dynamics 365 includes below features –

- Specific Customer/Vendor based pricing.
- Customer/Vendor group pricing.
- Pricing based on combination of specific Item – specific Customer/Vendor.
- Pricing based on Item/Product dimensions like Configuration, Style, Size and Color.
- Site/Warehouse/Branch wise pricing.
- Unit based pricing
- Quantity based pricing.
- Tier based pricing.
- Discount based pricing – Simple discounts, quantity discounts
- Percentage discount or specific amount discounts.
- Currency based pricing.
- Pricing for specified validity period.

Finance and Operations Search for a page USMF ?

Inventory ▾ Attribute-based pricing details Edit selected lines Options 

View trade agreements | D0004: HIGHENDSPEAKER

✓	Relation	Currency	Party code type	Account selection	Product code type ▾	Item	Configuration	Site	Warehouse	Unit	From date	To date	From	To	Amount in transaction ...
	Price (sales)	USD	Table	US-002	Table	D0004	000005	1	13	ea	1/1/2021	12/31/2021	1.00		1,200.00
	Price (sales)	USD	Table	US-002	Table	D0004	000005	1	13	ea	1/1/2021	12/31/2021	10.00	100.00	1,180.00
	Price (sales)	USD	Table	US-002	Table	D0004	000005	1	13	ea	1/1/2021	12/31/2021	101.00	200.00	1,170.00
	Price (sales)	USD	Table	US-002	Table	D0004	000005	1	13	ea	1/1/2021	12/31/2021	201.00		1,150.00
	Price (sales)	USD	Group	09	Table	D0004	000005	1	13	ea	1/1/2021	12/31/2021	1.00		1,220.00
	Price (sales)	USD	Group	09	Table	D0004	000026	1	13	ea	1/1/2021	12/31/2021	1.00		1,230.00
	Price (sales)	USD	Group	09	Table	D0004				ea	1/1/2021	12/31/2021	1.00		1,210.00
	Price (sales)	USD	Group	09	Table	D0004				pcs	1/1/2017		1.00		1,210.00
	Price (sales)	USD	All		Table	D0004				ea	1/1/2017		1.00		2,000.00

Customer name: Contoso Retail Los Angeles

Product name: HighEndSpeaker / High End Sp...

PRICES	PERCENT	DELIVERY	Working days
Price unit: 1.00	Discount percentage 1: 0.00	Lead time: 0	☒ No
Price charges: 0.00	Discount percentage 2: 0.00		☐ Disregard lead time
			☒ Yes

CURRENCY

Include generic currency: ☒ No

Trade agreements/Pricing management in Microsoft Dynamics 365



Unifying the Dots in your Business



About Unify Dots

UNIFY Dots helps you connect the Dots by providing solutions that enable digital transformation. Unify Dots specializes in AI-powered ERP, CRM, Customer Engagement, Field Service, Project Operations, Ecommerce and Point of Sale solutions.

AI Agents and Copilot enabled work	Finance, Accounting, Treasury, Budgeting, Financial Reporting	Supply Chain, Order Management, Manufacturing and WMS	CRM: Sales, Service, Field Service
Human Resources Management and Talent	Shop floor management, Sustainability and ESG	Data Analytics, Business Intelligence	Customer Experience - Customer Data Platform and Marketing
Power Platform – Power Apps, Automate	IP: Mobile Order Management, Contract Management	E-Commerce & POS	Industry Accelerators –Manufacturing, Agri, Insurance, Maritime, Real Estate

Unify Dots has local presence in Asia Pacific, Australia, New Zealand, Europe, North America and operate on a global scale with a local touch. Unify Dots is also committed to improving the world and has pledged to donate at least 25% of its profit towards the case of helping educate children from low-income families in developing countries.

Contact Unify Dots

Email us at **info@unifydots.com** to get more information on implementing Microsoft Dynamics 365 Supply Chain Management or contact us by calling one of our office locations or visit us at <https://unifydots.com>

Australia: +61 (2) 9053 4872

New Zealand: +64 9801-1069

Philippines: +63 (2) 8271 2458

Singapore: +65 3106-5160

United States of America: +1 (206) 452-7498

United Kingdom: +44 20 3885 0765