

Disruptive Advantage

Advanced Product Templates

www.disruptive-advantage.com



Efficient product creation for Dynamics 365 for Operations

For companies specializing in wholesale or retail, manufacturing, or engineering, new products often need to be created within Microsoft Dynamics 365. It can be a tedious and time-consuming process, but one that is essential. Including all related data such as product variants, product attributes and warehouse defaults takes time. Even though, often, much of the data for individual products is the same.



CHALLENGES

Creating products manually in Dynamics 365 with all the required related data is a time-consuming process, and data can easily be missed. Alternatively to upload the data can require populating many spreadsheets and the upload needs to be completed by a System Administrator. There are often activities required before a new product should be available for use, such as compliance checks and setting prices.

OUR SOLUTION

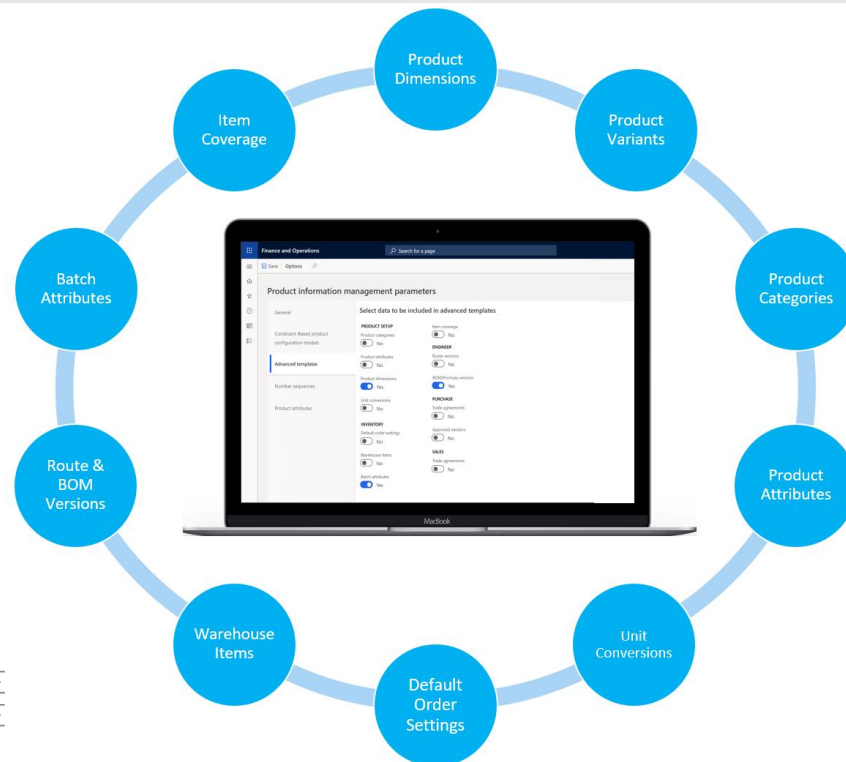
Advanced Product Templates provides an intuitive process to create pre-defined templates. New products can be created with all related data within seconds. Business users can quickly and easily configure and utilize templates. Activities can be triggered automatically on product creation, or you can opt to block products until required actions are completed. Products can also be easily created in Dynamics 365 from external systems.

BENEFITS

Advanced Product Templates enables products to be created with ease, increases efficiency and ensures data integrity. Generates and enables full tracking and monitoring of related activities and streamlines the Integration of product data with minimal input from external systems.

Advanced Product Templates for Dynamics 365 for Operations

Advanced Product Templates extends upon the standard Dynamics 365 functionality, with an intuitive process to create advanced product templates that are either shared, and available to your entire organization, or user specific personal templates. Templates enable quick and easy creation of products including all your related data such as location settings, attributes, pricing and much more.



PRODUCT INFORMATION MANAGEMENT

Advanced Product Templates is fully integrated within Microsoft Dynamics 365 Product Information Management so that users won't see any difference and won't have to learn an entirely new system; it is just as intuitive to use. Available for services, products and product masters

CONFIGURABLE TEMPLATES

Choose the data that you want to include within Product Templates, including:

- ✓ Product categories
- ✓ Product attributes
- ✓ Product dimensions
- ✓ Unit conversions
- ✓ Default order settings
- ✓ Warehouse items
- ✓ Batch attributes
- ✓ Item coverage
- ✓ Route versions
- ✓ BOM / Formula versions
- ✓ Item prices
- ✓ Item quality groups

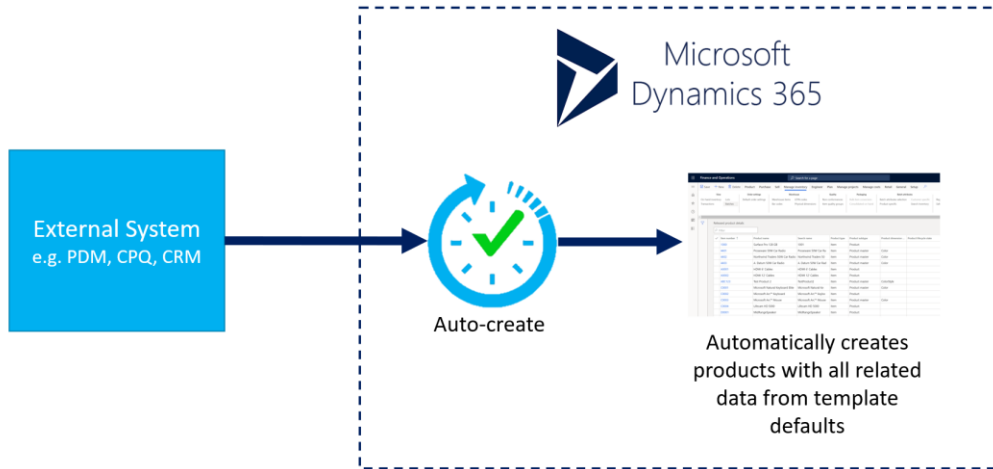
PRODUCT CASES

When creating new products with Advanced Product Templates, you can choose to trigger activities automatically, or you can opt to block the product from being used until your team completes the required actions. During the process, a New Product Case is created, wherein all related details can be captured, and activities can be tracked.

Advanced Product Templates

Auto-Create feature

Using our Advanced Product Templates auto-create function streamlines integration, whilst ensuring data integrity. With a minimal amount of data from external systems in conjunction with advanced templates, products are automatically created in Dynamics 365 for Operations within seconds. This feature can also be utilized for streamlined mass loading of product data for migration purposes.



EXTERNAL PRODUCT CREATION

For companies that initially create products using Product Data Management (PDM), Customer Relationship Management (CRM) or Configure, Price, Quote (CPQ) software. Often these systems only have basic product information, meaning that someone has to manually fill in all of the other data required by Microsoft Dynamics, which is incredibly time-consuming.

STREAMLINE PRODUCT INTEGRATION

The Advanced Product Templates Auto-Create feature streamlines integration by automatically creating products using minimal external data inputs such as Product ID, Product Name and the Advanced Template to be used. In Microsoft Dynamics 365, the products are automatically created with all of the template defaults.

INTUITIVE MASS MIGRATION

In Microsoft Dynamics 365, the migration of product data requires any new data to be imported using many different data entities, such as warehouse settings, item coverage, and released product variants. The Advanced Product Templates Auto-Create feature allows you to mass-create products with minimal data, by using default values across all these areas.

Advanced Product Templates

Multi-Create Groups

For manufacturers that often create groups of products using a common structure. Multi-Create Groups is a powerful feature that enables groups of new related products to be created all at once. Bill of Material and Formulas can be automatically created based on BOM and Formula templates, and new products can be intelligently included within the structure.



MULTI-CREATE GROUPS

Save time by creating a group of products at once. Use suffix and prefix parameters in conjunction with product templates to create products in the required sequence and format. Groups can be created quickly and easily through configuration.

BOM AND FORMULA TEMPLATES

Multi-Create Groups can be used to dynamically build BOM and Formulas using a mix of new and existing products. Such as include Finished Goods and Raw Materials within a group and then link them together within a Bill of Material.

PLANNING ITEMS

For process manufacturers, multi-create groups can be used to optimize productivity by creating planning items and automatically linking new or existing co-products and by-Products. The structure can be incorporated into a formula and a formula version automatically created accordingly.

Simplify processes, increase efficiency and streamline your business.

Ask a question via email: info@disruptive-advantage.com

Learn more: www.disruptive-advantage.com

<https://appsource.microsoft.com/en-us/product/dynamics-365-for-finance-and-operations/dia.advprodtemplates>

