Microsoft Dynamics 365

Product Bundle in Dynamics 365 SCM

Dynamics 365 FastTrack
Architecture Insights Series

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Agenda

- Product Bundle Overview
  - What is it?
  - What is changing?
  - Key Details?

- Product Bundle Release timeline

- Questions

Product Bundle Overview

Product Bundle in Dynamics 365 SCM

What is changing?

- With the upcoming deprecation of the Revenue Recognition feature, there is a need to ensure that customers using the Revenue Recognition Bundle feature set will not lose this functionality moving forward.

- The Revenue Recognition Bundle feature set within the product today (10.0.34) is being migrated to its own feature that does not depend on the Revenue Recognition feature management setting. This new feature is called Product Bundles and exists in a new model file named 'Bundle'.

Key details?

- The Product Bundle feature is intended to have functional parity with the 10.0.34 Revenue Recognition Bundle feature when product Bundle moves in general availability (GA)

- Purpose is to enable customers/projects dependent on the base bundle capabilities with an upgrade path rather than introducing a completely *new* feature.

- Like bundles, product bundles is intended to support selling and pricing a group of sellable/shippable items together as a bundle. The primary purpose is selling.

- Product bundle is not intended to represent a kit. It is not intended to support kitting/de-kitting operations, costed, to be inventoried, etc.

- For general availability to be announced soon (in private preview now) the functional scope will be at par with bundle. It is not planned to be extended. We will create a backlog of requests of added business support and include the ones in most demand as candidates when planning for future Waves

Product Bundle Overview

What is Product Bundle Functionality?

- A product bundle comprises a parent item and multiple component items. The parent item is entered on a sales order, so that order entry is more efficient. However, it's then exploded into the component items. While picking lists and packing slips, will list the component items. Sales confirmations and sales invoices will show only the parent item

- Product Bundle Setup:

    - Released Products -> Engineer FastTab: Production Type = Bom item

    - Released Products -> General FastTab: Product Bundle = checked (Product Bundle item)

    - Components must be then assigned to the product bundle/BOM parent item on the BOM versions page

- Product Bundles on sales orders

    Parent item: Laptop product bundle

    - **Component item:** A quantity of 1 of item 1000
    - **Component item:** A quantity of 1 of item S0021
    - **Component item:** A quantity of 1 of item Support

    - **1000:** $1,900.00
    - **S0021:** $150.00
    - **Support:** $500.00

- Enter Sales order for US-oo4 with line item of Laptop product bundle item

Sales order

000862 : Cave Wholesales

Lines Header | Open order

Sales order header														

Sales order lines

+ Add line + Add lines Add products 🗑 Remove Sales order line ∨ Financials ∨ Inventory ∨ Product and supply ∨ Update line ∨ Warehouse ∨ Retail ∨

✓	T...	Item number	Product name	Quantity	Unit		Adjusted uni...	Site		Warehouse		Unit price	Discount	Discount per...	Net amount	Adjusted net ...	Line status		Bundle net amount
		Laptop bundle	Laptop bundle	1.00	ea	∨	0.00000	1	∨	13	∨	2,300.00			2,300.00	0.00	Open order		0.00

Product Bundle Overview

- Confirm Sales order

Overview

+Add Remove Tracking information Totals Sales tax

✓	Update	Customer pa...	Sales order	Name	Currency
	Confirmation		000862	Cave Wholesales	USD

Setup

Lines

Delete   Sales order line ∨   Inventory ∨   Update line ∨

✓	Sales category	Text	Sales order ↑	Site	Warehouse	CW update	Item number	Update	Net amount	Scrap	Mode of deliver
		Surface Pro 128 GB	000862	1	13		1000	1.00	1,713.73	☐	10
		Insurance	000862	1	13		S0021	1.00	135.29	☐	10
		Support	000862	1	13		Support	1.00	450.98	☐	10

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Contoso Entertainment System USA
123 Coffee Street
Suite 300
Redmond, WA 98052
USA

Telephone
Fax
Giro
Tax registration number   1234123400

Confirmation

Page	1 of 1
Number	000862-1
Date	12/18/2020
Sales order	000862
Requisition	

Ship to:
Cave Wholesales
456 White Road
Abbeville, GA 31001
USA

Your ref.	
Our ref.	Julia Funderburk
Payment	Net 45 days

Item number	Description	Ship date	Quantity	Unit	Sales price	Discount	Discount percent	Amount	Print code
Laptop bundle	Laptop bundle	1/18/2021	1.00	ea	2,300.00	0.00	0.00 %	2,300.00	

This text is from the Sales Order Confirmation form notes

Currency	Sales subtotal amount	Total discount	Charges	Net amount	Sales tax	Round-off	Total
USD	2,300.00	0.00	0.00	2,300.00	16.23	0.00	2,316.23

When payment before 12/25/2020, 23.00 USD is granted in cash discount.

Product Bundle Overview

- Product Bundle net amount: The sum of component items must equal Product Bundle net amount

The unit price from the line for the parent item is allocated to the components in the following manner:

Total base sales prices from components: $1,900 + $500 + $150 = $2,550
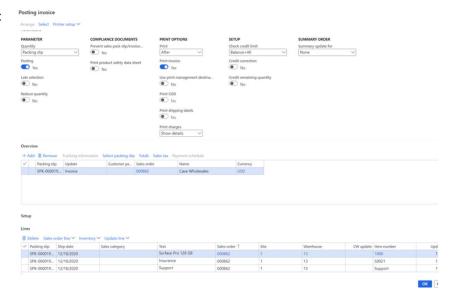
- **Component 1:** $2,300 × (1,900 ÷ 2,550) = $1,713.73
- **Component 2:** $2,300 × (500 ÷ 2,550) = $450.98
- **Component 3:** $2,300 × (150 ÷ 2,550) = $135.29

The sum of the components must equal $2,300, and it does ($1,713.73 + $450.98 + $135.29 = $2,300).

- When the sales order is picked and packed, the documents will include only the components of the product bundle. The packing slip and invoice must include a full product bundle. Otherwise, they can't be posted.

- Invoice the Sales Order:

- Microsoft Dynamics 365 Commerce channels, such as online, point of sale (POS), and call centers, don't support the Dynamics 365 SCM product bundle functionality at present.

Product Bundle Release timeline

Product Bundle Release timeline

10.0.34 – Private preview

10.0.35 – Remain in private preview in order to collect feedback
that need to be included for GA release.

Public preview and General availability - TBD

Q&A