



## What's new in AX

| New Functionality Name                        | AX Version In Which This Feature Was Introduced | AX Module Name   | New Functionality Description  |
|---|---|--|--|
| Information panels                            | 3.0   | Core   | Improved information sharing as users are presented with several information panels that they can click on and off. For example, they can see corporate news relevant to their role, weather, traffic and stock market reports as well as their Microsoft Outlook calendar and task list. Live reports from the other systems that are connected to Axapta, such as warehouse management, can also be published online.  |
| Easy web site creation                        | 3.0   | Core   | Creating and launching a tailored web site takes only five minutes!  |
| Cost and Service Categories                   | 3.0   | Cost Accounting  | The advantage of one single form is a better overview of all categories in the Cost Accounting module.   |
| Flexible budget                               | 3.0   | Cost Accounting  | The additional function of Plan cost accounting is simplified from the user's point of view and is now called Flexible budget.   |
| Automated financial statements exchange       | 3.0   | Financials   | XBRL uses financial reporting standards to exchange financial statements across various technologies, including the Internet. With XBRL, Axapta users need only enter information once, and it can be exported for use in an HTML document, government filings, credit reports, loan documents or other formats.   |
| Accounts consolidation in foreign currency    | 3.0   | Financials   | Accounts in a foreign currency can be consolidated at special consolidation exchange rates. In Axapta 3.0, you can mark ledger accounts as either monetary or non-monetary and set up separate consolidation exchange rates for both. You can also calculate the exchange rate adjustment directly when consolidating.   |
| Intercompany journals                         | 3.0   | Financials   | Axapta enables a business with several subsidiaries or distribution centers to set up intercompany journals. An intercompany transaction posted in one subsidiary is automatically updated in designated accounts of the other subsidiary or distribution centre. Online consolidation of both accounts and budgets can be carried out directly from Axapta. Both full consolidation and pro-rata consolidation are possible. Accounts can also be imported or exported for consolidation purposes.  |
| Bill of exchange and promissory note          | 3.0   | Financials   | General bill of exchange functionality and promissory note functionality are now available in Accounts Receivable and Accounts Payable respectively.   |
| E-mail standard correspondence                | 3.0   | Human Resource Management  | You can now e-mail standard correspondence, including Microsoft Word attachments, to applicants directly from within Axapta. As each e-mail is sent, Axapta automatically updates the status on each applicant. Bulk mailing is also possible, but you can still view the actual correspondence sent to any individual applicant.  |
| Dynamic plan                                  | 3.0   | Master Planning  | With the new dynamic plan in Master Planning, you can quickly see the effect of order changes. Recalculations are carried out only on the areas where you make changes – not on the entire plan. When a customer calls and wants to change a delivery date, for example, you can confirm the change in a few seconds, rather than having to call back later after a full recalculation.  |
| Gantt charts                                  | 3.0   | Production   | Gantt planning in the Production III series now gives you an even clearer view of production jobs and operations. You can assign unique colors to each production job and change the colors for different types of operation. You also get a live graphical view of work centre load, as determined by scheduled jobs and capacity.  |
| Electronically document exchange              | 3.0   | Commerce Services (Commerce Gateway)   | To exchange information system-to-system there's Axapta Commerce Gateway. With Commerce Gateway, you can exchange documents electronically – with any company, whatever their system.  |
| Flexibility in project pricing                | 3.0   | Project  | Project Pricing is now far more flexible. In addition to Hours, you can apply pricing rules to Costs and Revenues. Two new rules – Contribution Ratio and Miscellaneous Charges Amount – have been added.  |
| Project tasks per employee groups             | 3.0   | Project  | It is now possible to define what project tasks each person is allowed to perform. It is also much easier to see who is allowed to do what and where. Employee groups, categories and projects are combined on one screen for easy navigation and data entry. It is also possible to apply validations to journals.  |
| Work in process project management            | 3.0   | Project  | From the work in process (WIP) project overview, you now have direct access to the actions you can perform. You can view and adjust all related WIP transactions as well as reference all child projects. Work with the project estimates in order to follow up on the financial status of the Fixed Price projects involved.  |
| Automated internal trade handling             | 3.0   | Intercompany Commerce Services (Commerce Gateway)  | The new Intercompany solution handles internal trade between your subsidiaries or warehouses in different locations. Sales and purchase orders are transferred automatically using Commerce Gateway.   |
| Configuration item dimension                  | 3.0   | Warehouse Management   | The Configuration item dimension is now a fully functional item dimension. In addition, two new item dimensions, which you can assign for any purpose, have been added. All are supported throughout Axapta, so, for example, they integrate with price/discount, reports, trade agreements, and sales/purchase orders.  |
| Information sharing through Enterprise Portal | 3.0   | Enterprise Portal Framework  | Enterprise Portal gives your customers, vendors and employees Web access to ERP data and functionality, resulting in lower information-sharing costs and faster response times. No third-party software is needed. The only thing your customers, vendors and employees need is an Internet connection and a browser. Little or no training is required since the Enterprise Portal user interface and navigation follow familiar Web practices. Only the information and services that users need are presented. You decide what information to share and with whom. When, for example, a customer on the other side of the world enters a purchase order in Enterprise Portal, that information is registered immediately in Axapta – eliminating your need to enter it manually. The purchase order is published instantly on the personal web sites of anyone who needs to know about it, allowing them to act fast. |
| Role-based websites                           | 3.0   | Employee Role (internal role), Sales Representative Role (internal role), Customer Role (external role), Vendor Role (external role), Consultant Role (internal role), | All of the knowledge sharing and interaction with Axapta Enterprise Portal takes place via personalized, role-based web sites. Users can view relevant information and reports, publish documents and input data.  |
| Questionnaire                                 | 3.0   | Questionnaire for Enterprise Portal  | User of the Enterprise Portal has the opportunity of answering a questionnaire.  |

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| Single point for contact information  | 3.0 | CRM for Enterprise Portal                    | View and create all types of business relations and their contact persons: Sort business relation based upon type (customer, vendor, competitor, lead, prospect etc), View and create contact person, Create and view CRM Quotations, Perform price queries for your CRM Quotations, Connect items to the quotations, View quotation totals, View and create all types of documents, View relevant information connected to all your business relations, View relevant information connected to all CRM Quotations   |
| Remote product configuration  | 3.0 | Product Builder for Enterprise Portal        | Allows you to configure a product via the Internet using existing product models and is made available as an add-on to the Axapta Enterprise Portal – Customer Role. You have the same user-dialog as when configuring the item via the sales order line from the Windows version of Axapta.   |
| Cockpit view  | 3.0 | Performance Management for Enterprise Portal | The Performance Management Enterprise Portal gives users assess to view the output from the balanced scorecard module. That is to view either Knowledge accounts or to view Balanced Scorecard output like analog meter via a cockpit.   |
| Self service  | 3.0 | HRM for Enterprise Portal                    | Employees can view and update base data like address and contact information. The employee can also view and edit CV information as well as organizational base data. Buying Human Resource II will provide you with additional absence management functionality on the Enterprise Portal. Absence Registration: The employee can record absence, that is viewing and creating absence transactions and transferring them for approval. Absence Approver: The Absence approver, typically a line manager, now have the possibility of approving absence on the Enterprise portal. That is viewing absence, approving and rejecting absence.  |
| New Scorecard Structure   | 4.0 | Balanced Scorecard                           | Balanced Scorecard features are now available directly from the Navigation pane. In earlier versions, Balanced Scorecard features were available from the Human Resources section of the Navigation pane.<br>In earlier versions, the Chart of knowledge accounts represented a single, corporate level scorecard. The new scorecard structure allows the administration of any number of scorecards at the employee, department or organizational unit, or corporate levels. The new structure is hierarchical, meaning that all components are dependent on others and cannot exist independently. For example, objectives cannot be created without being linked to a scorecard; measurements cannot be created without being linked to objectives.   |
| Creating Measurable Objectives  | 4.0 | Balanced Scorecard                           | Objectives are new in this version, and are arguably the most important component of a scorecard. Objectives are the operational level achievements necessary to realize a scorecard's overall strategy, and cannot exist independent of a scorecard.  |
| Global Search is now available from the Task pane                                   | 4.0 | Core   | Use Although Global Search from your task pane to search for information across selected tables.   |
| Navigation Pane and New Look and Feel   | 4.0 | Core   | Navigation Pane that has the same look and feel as other Microsoft products such as Microsoft® Outlook and Microsoft® Internet Explorer, this reduces training and user adoption down time by using familiar client controls, user interfaces, and navigation paradigms; improves usability and accessibility for menus, toolbars, and keyboard commands.  |
| Alerts feature  | 4.0 | Core   | Create alerts to remind you about: Overdue deliveries, Deleted orders, Changed prices or other Events that require action or your attention.   |
| Help enhancement  | 4.0 | Core   | When someone wants to access the help solve the problem, this can now be accomplished without starting and opening Microsoft Dynamics AX.  |
| Native unicode support  | 4.0 | Core   | Microsoft Dynamics AX 4.0 supports all languages by running Unicode.   |
| Microsoft SQL Server 2005 Reporting Services  | 4.0 | Core   | Microsoft SQL Server Reporting Services is a comprehensive, server-based solution that enables the creation, management, and delivery of traditional, paper-oriented reports and interactive, Web-based reports.   |
| End User Sort   | 4.0 | Core   | In SQL Server 2005 Reporting Services, the report author can add the ability for the viewer of a published report to resort the data within his or her report.   |
| Report Management Expanded Functionality  | 4.0 | Core   | Report definitions, folders, and resources are published and managed as a Web service.   |
| Integrated Security   | 4.0 | Core   | One of the most significant improvements is the integration of the full Microsoft Dynamics AX security model with SSRS report models.  |
| Drill Down  | 4.0 | Core   | Using Print drill Down The benefits of Print Drill Down users have ability to navigate without using main menu, Data is automatically filtered at destination, Fewer form switches and Security is automatically enforced.   |
| Output Management   | 4.0 | Core   | In addition to the output options included in previous versions, Microsoft Dynamics AX 4.0 has expanded this capability. Users now have the option to select Non Collated printed. This option is useful for those wanting to run multiple copies of documents on different color forms. The other major change is with respect to the PDF output option. In Microsoft Dynamics AX 4.0, this now uses the Adobe Acrobat PDF generation engine, and therefore, Adobe is required.   |
| Visual Studio Integration   | 4.0 | Core   | SQL Server 2005 Reporting Services includes a set of Web Parts that make it easy to integrate reports into a SharePoint Portal Server 2003 or Windows SharePoint Services environment. For advanced report design, the full power of the Visual Studio suite is available to the developer.  |
| Report Builder doesn't require to know underlying data structure                    | 4.0 | Core   | Report Builder incorporates a user friendly business query model that enables users to build reports even if users do not possess deep technical understanding of the underlying data sources.   |
| Report Delivery   | 4.0 | Core   | Users can view reports in a Web-Based format or in e-mail. SSRS provides the user with multiple output formats for maximum flexibility.  |
| RFID  | 4.0 | Core   | The introduction of Radio Frequency Identification (RFID) technology brings manufacturers and distributors improved visibility into their supply chain by increasing the number of data capture points.  |
| User Favorites  | 4.0 | Core   | Users may set up a Favourites Pane with selected menus from the Navigation Pane to speed their access to widely used functions.  |
| Web based report access and management  | 4.0 | Core   | Report Manager is a Web-Based report access and management tool that enables access through Microsoft Internet Explorer. It is used to administer a single report server instance from a remote location over an HTTP connection.  |
| Windows Authentication logon  | 4.0 | Core   | Microsoft Dynamics AX logon is moving to an Active Directory-based solution that improves security and administration. Users now only need to log on to their computers that have Microsoft Dynamics AX 4.0 loaded to have access Microsoft Dynamics AX.   |
| Windows Server 2003 Support   | 4.0 | Core   | Further integration with the Microsoft technology stack eases setup and administration tasks. Building on Microsoft Windows Server 2003 provides security, reliability, availability, and scalability. Microsoft has also improved and extended the Microsoft Windows Server operating system to incorporate the benefits of Microsoft .NET for connecting information, people, systems, and devices into Microsoft Dynamics AX 4.0.<br>Three objects can be synchronized:<br><ul style="list-style-type: none"> <li>○ Tasks</li> <li>○ Appointments</li> <li>○ Contacts</li> </ul> Steps have been taken to enable flexible options for synchronizing these objects. Users can lock objects when they are being edited and synchronized so other users cannot change the objects. This avoids users overwriting each other's changes when they are modifying or synchronizing the objects at the same time. |
| enhanced Synchronization between Microsoft Dynamics AX and Microsoft Office Outlook | 4.0 | Sales Force Automation                       |  |

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|   |     |                           | <p>Sales statistics are enhanced. These enhancements include:</p> <ul style="list-style-type: none"> <li>○ Flexible graphing options</li> <li>○ Flexible sales periods</li> <li>○ New data retrieval options</li> </ul>  |
| Sales statistics are enhanced   | 4.0 | Sales Force Automation    | <ul style="list-style-type: none"> <li>– Sales and quotation categories</li> <li>– Business relation categories</li> <li>– Product categories</li> <li>– Campaign categories</li> <li>– Telemarketing categories</li> </ul>  |
| Cost balance  | 4.0 | Cost Accounting           | The form Total values, now called Cost balance, is redesigned and can display a value type over two different periods, so user has more options on how to display total values. The Cost balance also enables drill-down forma cost line to a cost category without leaving the form.  |
| Accrual Schemes   | 4.0 | Cost Accounting           | The functionality of Accruals is rebuild according to the General Ledger, and there is a new form Accrual schemes used for the setup. The Accrual scheme consists of several rules on how the accruals are executed. These rules are set up in the Accrual schemes form in the Setup menu. The Accrual scheme is selected in the Accrual identification field when you create Accruals in the Accruals form.   |
| Cost and Service Distribution   | 4.0 | Cost Accounting           | <p>You can now distribute not only costs and services that are posted without a dimension, but also those posted with a dimension. This lets you redistribute the costs and services on any dimension including the original one, but only on the same cost category.</p> <p>The distribution of costs posted with dimension can be used if the reallocation on the same cost category is needed. In this case a user does not have to use allocation, but only the distribution. If costs are reallocated on the original cost category, these costs can additionally be processed by distribution or by allocations.</p> |
| Budgeting   | 4.0 | Cost Accounting           | <p>Besides budget models it is now possible to create more complex models by using the existing models as sub-models to provide the user as variable budgeting tool as possible. If sub-models are linked to the one main model, the main model provides the user an overview of total budget costs over all sub-models including the main model.</p> <p>The budget functionality is enhanced with the ability to enter budget costs not using the Budget overview form, newly called Budget form, but using the Cost budget and Service budget, that is in the Journals menu.</p>   |
| Import XBRL Taxonomy  | 4.0 | Financials                | <p>The XBRL taxonomy manager: A tool which enables importing XBRL taxonomies located on the Internet, at <a href="http://www.xbrl.org">http://www.xbrl.org</a> or on the hard disk.</p> <p>XBRL mapping facilities: Facilities which enable mapping between taxonomy elements and combinations between ledger accounts - dimensions.</p> <p>XBRL report: A reporting facility which uses the financial statement engine to generate instance documents (files that have a *.XML extension and the appropriate format) according to XBRL Specifications.</p>  |
| Payment Method and Proposal   | 4.0 | Financials                | Microsoft Dynamics AX 4.0 specifies different payment attributes on methods of payment to be transferred to the payment proposal. The purpose of the payment attributes is to retain this information regardless of the period defined.  |
| EU115 Sales Tax Directive   | 4.0 | Financials                | <p>The European Council requires that companies record justification for sales tax exemption. If no sales tax is applied to trade documents, it is necessary to report why the sales order is sales tax exempted. In Microsoft Dynamics AX 4.0, it is now possible to:</p> <ul style="list-style-type: none"> <li>○ Associate a sales tax exempt description in trade documents.</li> <li>○ The sales tax exempt description is saved on sales tax transactions for history and reprinting.</li> </ul>   |
| Aging Buckets   | 4.0 | Financials                | The typical business process requires the ability to quickly analyze third-party open balance situation from different view angles. Aging buckets have been implemented in Microsoft Dynamics AX 4.0 to efficiently inquire on third-party balances.   |
| Refund Checks   | 4.0 | Financials                | Under certain circumstances companies must generate payment refunds to their customers or to process refunds received from their vendors. This usually occurs when credit notes, over-payments and bonuses are involved in third-party transactions.   |
| Default Vendor Account Setup  | 4.0 | Financials                | In Microsoft Dynamics AX 4.0 it is possible to create a check refund that prints out a check. The refunding feature is implemented in payment journals for customers.  |
| Transaction Reversal  | 4.0 | Financials                | Improvement to set up default vendor accounts for fast and efficient entry of vendor invoices.   |
| Consolidation According to the FASB 52 Regulation                     | 4.0 | Financials                | The transaction reversal feature enables the user to easily reverse transactions that were entered and posted incorrectly.   |
| Ledger Accrual  | 4.0 | Financials                | <p>FASB 52 concerns the consolidation of a mother company and a subsidiary using different currencies.</p> <p>Most common accounting rules require companies to report income when earned expenses are incurred. Standard practice is to record and recognize revenues and expenses in the period they are incurred, because of their significance to the future income and cash flow of the company.</p> <p>In Microsoft Dynamics AX 4.0, the Accrual schemes feature is implemented to defer the cost or income throughout the year.</p>   |
| Depreciation Books, Conventions and Bonus                             | 4.0 | Fixed Assets              | Use Depreciation books to track information that is used only for tax or other non-financial purposes without affecting the general ledger.  |
| Move Employment Affiliations can be done for all employees in a unit. | 4.0 | Human Resource Management | Formerly, if moving an employee from one organizational unit or position to another in Microsoft Dynamics AX Human Resources, users had to terminate the affiliation with the old unit and then rehire the employee in the new unit. This process only occurred for one employee at a time, which was repetitive and time consuming. Now, users can perform the same procedure for all employees in a unit. Additionally, there are options for handling the status of the current position and organization unit.   |
| Absence Requests functionality changes drastically                    | 4.0 | Human Resource Management | <p>In earlier versions of Microsoft Dynamics AX Human Resources, it was only possible to register absences after the fact; requests for future absence dates occurred outside the system. The advent of the Absence Request functionality changes all that.</p> <p>Users can transfer requests, which can be accompanied by a note elaborating on the request, for a single date or a series of future absence dates to an approver. The approver can approve or reject the request. In the case of a rejection, the approver can also provide a note explaining the denial.</p>   |
| E-recruitment   | 4.0 | Human Resource Management | The E-recruitment features make it easier to reach a larger number of potential applicants by integrating recruitment project job advertisements with the Enterprise Portal. E-recruitment features also facilitate validation of employment applications submitted from the Enterprise Portal in response to an advertisement. These features can significantly improve recruitment project effectiveness, and simplify the way in which a company receives and processes employment applications submitted from the Internet.  |
| Mass hire   | 4.0 | Human Resource Management | Mass hire projects speed up hiring and termination processes, and at the same time reduce data administration by allowing users to manage information for many people at the same time.  |

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| Intercompany Master Planning Principle   | 4.0 | Master planing Intercompany | Planners throughout the chain of all "Intercompanies" benefit from using Master Scheduling as it provides a material and capacity overview that informs the customer when to deliver a sales request. The planners use the known processes with the addition of an Intercompany master schedule.  |
| Intercompany Master Planning             | 4.0 | Master planing Intercompany | Master scheduling between multiple companies is possible in Microsoft Dynamics AX 4.0 under the condition that all companies are running in the same database. This enables the chain of companies to react to a demand from the selling company and transfer this to a demand down the chain as a purchase order. In the related company the purchase order becomes a sales order which can be transferred into a purchase order still another related internal company.   |
| BOM Calculation                          | 4.0 | Production                  | In Microsoft Dynamics AX 4.0 the calculation principle has been changed and improved. It now calculates the BOM structure as a single calculation for the actual quantity. Separate calculations for each sub-BOM must not be performed.<br>Based on all sub BOMs, on all levels and operations, Microsoft Dynamics AX 4.0 gives a total cost and sales price calculation. Any change in the quantity of the series used in sub BOM is included in the calculation.   |
| Quantity Dependent BOM & Route Version   | 4.0 | Production                  | Quantity Dependent BOM & Route Version function benefits a company in many ways, but is mainly used to minimize the manual interaction from order entry to production execution. This can minimize the errors associated with version changes.  |
| Setup of Range and Active BOM and Route  | 4.0 | Production                  | Microsoft Dynamics AX 3.0 handles multiple versions of the BOM and routing but only one is active for a date period. The same logic is used for Microsoft Dynamics AX 4.0, but it uses a mandatory combination of the date interval and the quantity interval to make the unique selection.   |
| Shop Floor Control                       | 4.0 | Production                  | Microsoft Dynamics AX 4.0 handles many active BOM versions for the same period but for different quantities in addition to many active BOM versions for the same quantity but for different date periods.   |
| Nww Production Feedback feature          | 4.0 | Production                  | Dedicated job table (makes the update of registration forms more versatile), Integration of absence registration with human resources, Configuration of registrations forms.  |
| Notice Board                             | 4.0 | Production                  | When you start a production order or provide quantity feedback, you can also provide feedback regarding the picking list.<br>If for example, another batch of raw material has been used or actual material consumption is larger than calculated, provide this feedback directly using Shop Floor Control.   |
| The new Cleanup Registrations feature    | 4.0 | Production                  | The notice board in Microsoft Dynamics AX 4.0 enables supervisors and managers to send messages to specific employees through the registration form. The notice board has a read receipt feature to see whether a specific employee has read the message.<br>Supervisors and managers can benefit from these new features as they are now able to direct information to exactly those who need it and can verify that the information has been read.  |
| Product Builder                          | 4.0 | Product builder             | A new feature has been added to let users move or delete old registrations. Fewer records improve overall performance.<br><br>Product Builder in Microsoft Dynamics™ AX 4.0 simplifies and streamlines the process of ordering, planning, and producing customized products, helping customers to win orders and increase customer loyalty. Product Builder in Microsoft Dynamics AX 4.0 offers several new features including:<br><ul style="list-style-type: none"> <li>○ Improved validation rules system</li> <li>○ Graphics for configurable items</li> <li>○ Product model creation wizard</li> </ul> These improvements help users work with Product Builder for Microsoft Dynamics AX more easily and reinforce its integration with other Microsoft Dynamics AX modules. |
| Multiple Compilation of Product Models   | 4.0 | Product builder             | A new product models multiple compilation functionality has been introduced. Users can compile the modeling tree and validate rules for several product models at the same time.  |
| Automatic and Mandatory Configuration    | 4.0 | Product builder             | In previous versions of Microsoft Dynamics AX, it was only possible to automatically calculate item sales price and delivery date. Four new options are available to make item configuring mandatory, automatic, or half-automatic. All four options are set up on the General tab of the Items form.   |
| Enhancements in product model form       | 4.0 | Product builder             | It is now possible to use drag-and-drop function when building the modeling tree. A list of icons has been added to the form that shows available node types. The functionality is similar to the BOM designer. When creating a new node or moving an existing node, drag the icon to the position in the tree where the node should be placed.   |
| Enhancements in Parameters form          | 4.0 | Product builder             | In the Parameters form, the enhancements include:<br><ul style="list-style-type: none"> <li>○ A new Lookup method field has been added.</li> <li>○ In a previous version, it was only possible to select either reusing or not reusing existing configurations when configuring an item. This functionality has been extended: the Reuse configurations check box has been replaced with the optional field.</li> <li>○ Two new number sequences for rule clauses and sets have been added.</li> </ul>  |
| Validation Rules                         | 4.0 | Product builder             | The Product Builder rules system has been extended and changed. It now has three different kinds of rules: Formulas, Actions, Constraints. Moreover, all the rules in a product model are available from a single form, which improves the overview of the product model rule system. In previous versions, the different types of rules attached to a product model had to be looked up separately.  |
| Create Production Order from Sales Order | 4.0 | Production                  | When you create a production order directly from a sales order line Microsoft Dynamics AX 4.0 automatically selects within the valid date and quantity ranges. The sales representative or planner does not have to manually set this up. This feature is useful to many companies and industries.  |
| Production Order Costing                 | 4.0 | Production                  | Production order costing has been improved so that only inventory transactions that are fully completed and marked "end job," update the inventory transactions which then updates the cost value.  |
| Subcontracting                           | 4.0 | Production                  | Microsoft Dynamics AX 4.0 adds to subcontracting functionality for easier logic usage.  |
| Special Days                             | 4.0 | Production                  | A Special day in Shop Floor Control is a date that must be handled differently than the standard approach. An example is a national holiday.<br>The primary benefit of this feature is that users do not have to change a pay agreement for a specific day and change it back the next day. This feature provides tools for specifying pay and absence for this Special day.  |
| The new Work Planner                     | 4.0 | Production                  | The new Work planner tool is a graphic tool that enables supervisors and managers to plan employee work schedules. When the selected period is planned the result is saved in the form of entries in the Profile calendar.<br>The standard way for the shop floor control system to apply profiles for employees is to combine the clock in time for the employee and the employee's profile group. The Work planner lets users decide the profile beforehand while planning a three shift team for the next week or month.   |
| Users can Configure Registration Forms   | 4.0 | Production                  | In Microsoft Dynamics AX 4.0, users can configure the registration forms to fit the forms to the specific needs of the company, department, or employee. For example, the registration form can be configured to show relevant types of jobs when an employee registers his or her ID.<br>Some of the benefits of this feature are:<br><ul style="list-style-type: none"> <li>○ The employee sees only the required information.</li> <li>○ Less input is needed from the employee meaning less time spent on registration and a reduced risk of errors.</li> </ul>   |

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| On call provides new pay option                                   | 4.0 | Production                        | <p>The benefit of the new type of indirect activity is that On call provides the possibility of calculating pay for employees with on call duties.</p> <p>The employee with on call duty clocks in using an on call activity. This activity contains information about clock in time and subsequent clock out time, even though the employee registers on several different jobs before clocking out again. This means that bonus pay can be generated based on the exact time the employee has worked.</p> <p>If the employee receives another bonus for the second or third time of being called to work, set up different indirect activities and delimit the pay using the different indirect activities.</p>  |
| Absence Codes migrated to HRM module                              | 4.0 | Production                        | There may have been a code for illness in the shop floor control and human resources modules, now you need only one code.  |
| The Estimate form has been improved                               | 4.0 | Project                           | The Estimate form has been improved to provide a better overview of the estimate project's economy before posting.   |
| Internal project has been subdivided into three new project types | 4.0 | Project                           | <p>The three new internal projects types :</p> <ul style="list-style-type: none"> <li>○ The time project is a gathering of hours without ledger postings. Examples include holidays and education.</li> <li>○ The cost project posts all costs of hours, expenses, and items to the Profit &amp;Loss (P&amp;L) statement and cannot be capitalized.</li> <li>○ The investment project uses the estimate system to capitalize the costs of hours, expenses, and items during the project.</li> </ul>  |
| New reports have been added                                       | 4.0 | Project                           | These additional reports provide different pictures of project performance. For example, they can be used to measure the performance of a particular category. If a project category corresponds to a department in a company, the report can be used to compare costs and revenue for the individual department.  |
| The improved Invoice Control form                                 | 4.0 | Project                           | <p>The improved Invoice Control form:</p> <ul style="list-style-type: none"> <li>○ Provides an easy way to view both invoice and non-invoiced transactions.</li> <li>○ Displays the quantity of hours in addition to the hours cost.</li> <li>○ Provides access to the individual transactions to be adjusted after posting.</li> </ul>  |
|   | 4.0 | Project                           | <p>The following new features have been introduced in Microsoft Dynamics AX 4.0 Project Accounting:</p> <ul style="list-style-type: none"> <li>○ Project quotation lines can be converted to project forecasts.</li> <li>○ Improved invoice control enables viewing of invoiced and noninvoiced transactions.</li> <li>○ Adjustments can be made to individual transactions.</li> <li>○ Internal projects can be configured as time, cost or investment projects.</li> <li>○ An elimination can be reversed.</li> <li>○ A new statistics form provides an easier way to compare actual to budgeted costs.</li> </ul>   |
| New statistics form has been introduced                           | 4.0 | Project                           | <p>The new form makes it easier to compare the project economics to the budgeted amounts. For example, the deviation view shows the actual project costs, budgeted costs, and the difference between the two.</p> <p>The project manager can then view the:</p> <ul style="list-style-type: none"> <li>○ Current actual costs applied to the project</li> <li>○ Budgeted costs from the forecast</li> <li>○ Difference between the two</li> </ul>  |
| Transit Warehouses (Transfer Orders)                              | 4.0 | Intercompany Warehouse Management | The concept of transit warehouses in the transfer process is a new feature for Microsoft Dynamics AX. Items that are in transit cannot be reserved for use in another order or other type of issue. This is because the items are physically unavailable for allocation as they are being transported from one location to another. Therefore, when you create a transfer order a transit warehouse is used for the period that the items are being transported. Transit warehouse represents the transport, for example a VAN, truck or airplane between the From warehouse and the To warehouse.   |
| Delivery Date Control and Transfer Orders                         | 4.0 | Intercompany Warehouse Management | Delivery date control functionality in sales orders enables you to find the earliest possible delivery date to the customer based on several factors such as transport calendars, transport time, receipt calendars and other time elements. In Transfer orders the delivery date control performs the same function with regard to the earliest receipt date at the To warehouse.   |
| Transport Time (Transfer Orders)                                  | 4.0 | Intercompany Warehouse Management | In Microsoft Dynamics AX you can specify transport times between warehouses when you create a transfer order between the two warehouses.   |
| Inercompany   | 4.0 | Intercompany                      | Many enterprises have established companies in several different locations, either in the form of a holding company with affiliated production and sales companies, or in the form of production and sales companies that purchase or sell directly among themselves. Frequently companies consist of many subsidiaries spanning different countries, languages, and currencies. Typically, internal trade between companies involves lots of duplicate manual data entry. This can result in a waste of resources and an increased risk of errors occurring. With today's fast, secure, and effective communication lines, it makes sense to use one common business management solution for trade between affiliated companies. This common system results in automation of many processes and reduces the need for manual data entry. |
| Return Order (Intercompany)                                       | 4.0 | Intercompany                      | User can perform a return order using the intercompany order chain.  |
| Settlements and Intercompany                                      | 4.0 | Intercompany                      | With the setup under the intercompany endpoints on registering the payment in the accounts payable in company 1 the payment is automatically registered and posted in company 2 without the intervention of an accounts receivable clerk.  |
| Price Simulations (Quotations)                                    | 4.0 | Trade Agreements                  | <p>Price simulation tool to aid sales personnel in calculating and saving various pricing scenarios for sales orders. The price simulation tool enables discounting on a total quotation basis or on a quotation line basis and calculates the effect of the discounting on the contribution margin.</p> <p>New information is calculated immediately and displayed in the appropriate fields. Personnel can then decide to apply the changed information directly from the price simulation form.</p>   |
| Quantity Dependent BOM  | 4.0 | Trade Agreements                  | <p>Companies with demands shifting between low and high quantities can automatically enable the change of BOM and Route to the actual demand. Previously this process was manual, time-consuming, and subject to possible errors.</p> <p>This new functionality enables these choices:</p> <ul style="list-style-type: none"> <li>○ On the BOM the best choice of raw material for a process can be selected in base data.</li> </ul>  |
| Project Quotations  | 4.0 | Trade Agreements                  | <p>The unified data model helps guarantee data consistency and empower users to work smarter and also retrieve insightful statistical information in the quotation management process.</p> <p>Now clients can be served with a generic project quotation type, or quote for items, hour costs, expenses, and fees.</p> <p>Now project quote hase ability to determine a contract amount and to link an existing or new project to a quotation that was won.</p>  |
| Multiple Ship To  | 4.0 | Warehouse Management              | The new multiple ship to functionality lets users specify delivery addresses per order line instead of just according to the order header, as was the case in earlier versions of Microsoft Dynamics AX.   |
| Enhanced Delivery Date Control                                    | 4.0 | Warehouse Management              | Enhanced delivery date control supports the user in their daily work and takes the complexity out of giving realistic delivery dates. The user may take orders and Microsoft Dynamics AX determines whether the requested delivery date for the customer can be met from a shipping perspective. If a requested delivery date cannot be met the user is provided with user friendly simulation possibilities helping them find a resolution to the requested delivery date problem.  |

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| Release Sales Order Picking  | 4.0  | Warehouse Management          | The focus on process oriented workflows in AX 4.0 has additionally been enhanced by the introduction of the Release order picking form. This form gives warehouse managers an overview of current sales order lines that have been released for picking based on the actual availability of on hand inventory to fulfill the orders. Additionally by using customer classification categories warehouse managers can prioritize which sales order lines to pick.   |
| Transfer Orders  | 4.0  | Warehouse Management          | The new Transfer order form gives users a more process-oriented way of handling transfer orders between warehouses in the same company.  |
| EPC usable   | 4.0  | Warehouse Management          | EPC is supported, it is the next generation of product identification. The EPC is a simple, compact license plate that uniquely identifies objects in the supply chain.  |
| Version Control integrated to Visual Studio Team System  | 2009 | Configuration and Development | Version Control with integration to Visual Studio Team System for team development and Code Upgrade.   |
| Workflow Template Editor   | 2009 | Configuration and Development | Workflow Template Editor is now available in AX 2009.  |
| Address information is added to the new Site form  | 2009 | Core                          | You can enter and store address information for a site.  |
| Create multiple sites within a company   | 2009 | Core                          | Use multiple sites within a company to gain better insight into the company  |
| Activate the multisite functionality   | 2009 | Core                          | After you have set up your site structure, you can activate the multisite functionality using the Multisite Activation Wizard. This results in the following: 1) The site dimension becomes active in all inventory dimension groups. 2) The site dimension becomes mandatory and must appear on all inventory transactions. You can implement the multisite functionality on a company basis when you install Microsoft Dynamics AX or upgrade from earlier versions of Axapta or Microsoft Dynamics AX   |
| Enhanced business intelligence framework   | 2009 | Core                          | Ability to use the new OLAP framework to automatically generate SQL Server Analysis Services 2005 dimensional models from Microsoft Dynamics AX metadata directly brings opportunity to consolidate middleware analytical tools.   |
| Improved user interface and navigation   | 2009 | Core                          | Buttons and controls used in Microsoft Dynamics AX now look and work in a manner similar to the controls used in Microsoft Office 2007.  |
| Export to Excel option   | 2009 | Core                          | You now can export information from almost any form in Microsoft Dynamics AX using the Export to Excel option on the Command menu in a form.   |
| Predefined job-specific Role Centers   | 2009 | Core                          | A number of pre defined Role Centers present job-specific information based on roles within the organization to help people easily prioritize tasks and make quick business decisions.   |
| Global address book  | 2009 | Core                          | The global address book is a centralized form where you can store information about customers, vendors, business relations, contacts, employees, and anyone else that your company interacts with. It is a repository for every person or organization that your organization comes in contact with. You also can track employee information in this table. Information about all of these people is tracked in this form. Customers can be linked to each other across all of Microsoft Dynamics AX, and multiple entities can be assigned in the form, as well.  |
| Directory view   | 2009 | Core                          | The directory view provides a graphical representation of entities in your Microsoft Dynamics AX system: 1) the hierarchy of companies, organization units, jobs, positions, and employees. 2) companies, reporting managers and positions. 3) companies, sites, and warehouses, production units, work center groups, work centers, inventory aisles, and locations.  |
| Print management enhancements  | 2009 | Core                          | One can now manage the content of business documents and generate and deliver them in a consistent way: the number of copies to produce footer text in multiple languages and print destinations at the module level; print management settings can be specified for specific accounts or transactions.  |
| Time zone support added  | 2009 | Core                          | Multiple time zones are supported, information in date and time fields is displayed in the user's preferred time zone. For the multinational organizations, users no longer should keep time zone differences in their memory.   |
| Integration with Communication Server  | 2009 | Core                          | Improved efficiency of communication between employees, customers and vendors as Microsoft Dynamics AX 2009 integrates with Microsoft Office Communicator to provide "presence indicators" in the Global address book, based on the schedule information that is saved in that person's Microsoft Outlook Calendar.  |
| Personalized Role Centers present job-specific information and enhance personal productivity   | 2009 | Core                          | Role centers enable employees to work more efficiently, by getting needed information in their front page  |
| Role centers linked to community sites   | 2009 | Core                          | Role center pages link to Microsoft Role Tailored Community sites, where users can learn from and collaborate with others in their professional discipline.  |
| Task Recorder tracks actions in application and provides step-by-step guide describing process | 2009 | Core                          | Super users may easily record best practice system usage and easily share with colleagues  |
| Transaction tracking   | 2009 | Core                          | Each time that a transaction that affects ledger accounts is created or modified, the date and time of the transaction and the user name of the person who created or modified the transaction is tracked in the application database. This allows backwards traceability and decreases auditing costs.  |
| Workflow   | 2009 | Core                          | One can use workflow functionality to create individual workflows, or business processes, defining how a document flows through the system by showing who must process and approve a document, a number of available reporting and business intelligence features may bring transparency to status tracking and overall process control. Workflow also can be used by partners and customers to implement additional task and approval-based workflows.  |
| Select user interface language for the client and Enterprise Portal                            | 2009 | Core                          | When user selects a user interface language on the client computer for Microsoft Dynamics AX, that same language will also be used on the Enterprise Portal.   |
| Batch processing enhancements  | 2009 | Core                          | One can now run batch jobs on an AOS instance without a client (in a specific processing order and parallelism) and manage all running batch jobs in the environment from a single form.   |
| Import leads and business sectors  | 2009 | Core                          | You can import files to create records for lead records and business sectors.  |
| Define sales processes   | 2009 | Core                          | You have the flexibility to create multiple types of sales processes for the different functions in CRM, such as qualifying leads, telemarketing, campaigns, and sales.  |
| Sales force automation (SFA) integration with Enterprise Portal                                | 2009 | Core                          | This feature provides the flexibility to make organizational decisions. Employees are allowed to access all of the functionality and information they need to perform their jobs without installing additional applications on their computers. Also, salespeople can log on from any computer that has an internet connection, which extends their ability to close more deals. If your organization outsources departments, you can still retain ownership of the data by allowing vendors to access the information from the main database.   |
| Responsibilities in CRM  | 2009 | Core                          | Because every organization has different processes for various activities, such as marketing campaigns or sales, you now can identify process steps for each activity and then assign the functions to the appropriate individuals.  |
| Lead and Opportunity management in CRM   | 2009 | Core                          | Lead management in CRM: You can gather and store information about the potential purchase of a product or service by centralizing information. You can create, review, update, or delete information about leads, and you can define rules and create stages or activities that will assist you in qualifying or disqualifying a lead. You also can associate responsibilities, employees, campaigns, and questionnaire tracking to your stored information so that you can turn leads into opportunities and acquire customers.<br>Opportunity management in CRM: You can create, develop, and close sales deals while tracking the information through a central location. All contacts, competitors, partners, products, quoted prices, quantities, and sales stages are stored together to ensure that you always know where a potential sale is in the sales process. |



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| Energy consumption and greenhouse gas emissions tracking                           | 2009 | Environmental Sustainability | Energy consumption and greenhouse gas emissions tracking is now available in AX.  |
| Compliance module site   | 2009 | Financial Management         | A central improved Enterprise Portal's location to view and monitor compliance-related information. Organization can use this site to store process documents and view database logs, reports, charts, and key risk indicators. Monitoring this information in a central repository will help employees to better understand compliance requirements and how they integrate with organization's business processes.   |
| Post net income and net loss to multiple dimensions                                | 2009 | Financial Management         | You can post net income or net loss amounts to multiple equity and dimension combinations during the year-end closing process.  |
| Combine Intrastat data transactions that have the same tax exempt number           | 2009 | Financial Management         | You can combine Intrastat data transactions that have the same tax exempt number to easier extract statistics.  |
| Inactivate a vendor bank account   | 2009 | Financial Management         | Use the new Active date, Expiry date, and Status fields in the Vendor bank accounts form to change a vendor bank account to an inactive status. Doing this prevents funds deposition to the vendor bank account that is no longer used , or is not ready to accept payments.  |
| Define remit-to addresses  | 2009 | Financial Management         | Remit-to address (in addition to the primary address) for each vendor can be defined, to be used as the payment address for the vendor.   |
| Withholding tax transaction text   | 2009 | Financial Management         | You can now identify withholding tax transactions with the payments that they are associated with more easily. The transaction text entered in a payment journal is copied automatically to the withholding tax record when the payment is posted. You can use the new Vendor transaction inquiry form to query on withholding tax transactions.  |
| Centralized customer statements  | 2009 | Financial Management         | You can now print customer statements from one company (the statement company) on behalf of other companies (the activity companies) in your organization. You can receive payments in either the statement company or an activity company. This feature reduces analysis and communication overhead, in addition transparently represents Group's interest.  |
| Look up payment customer number by invoice number                                  | 2009 | Financial Management         | Accounts payables can enter or select a single invoice number when you enter customer payments in a payment journal. The customer number is available automatically, based on the invoice number. A payment journal line is created for the customer, and the invoice is marked for settlement.   |
| Check reversals journal and Deposit slip payment cancellations journal             | 2009 | Financial Management         | You can use two new journals to review payment reversals and cancellations before rejecting or posting them. In previous releases, when you clicked the Payment reversal button in the Check form or clicked the Cancel payment button in the Deposit slip form, the reversal or cancellation was posted immediately. Now you can either post immediately or review reversals and cancellations before you reject or post them. Reviews might help prevent fraud and identify errors.   |
| Fill utility   | 2009 | Financial Management         | The fill utility allows users who have the proper security settings to automatically mass update a range of records at the same time instead of updating each record individually.  |
| General ledger reason codes and transaction hold                                   | 2009 | Financial Management         | You now can enter a reason for journal transactions in the General ledger, using a Reason code and a Comment, and enter an expanded number of characters for transaction text. In addition, you can prevent a voucher from being posted until a specified date. Entering a future release date places a transaction on hold, which prevents posting while making the transaction available for review and analysis.   |
| Mandatory payment preference   | 2009 | Financial Management         | You can set up a ledger account to require that a payment preference is required when a transaction is posted to that account.  |
| Taxes and ledger accounts  | 2009 | Financial Management         | You can set up General ledger so that a tax direction has to be entered for each account. You also can restrict the tax codes that are allowed for any specific ledger account.   |
| Tax groups for free text invoices  | 2009 | Financial Management         | You can specify that a tax group is mandatory when you create a free text invoice.  |
| Ledger account categories  | 2009 | Financial Management         | You now can classify a ledger account by a ledger account category, which is a new attribute for ledger accounts  |
| Track budget revisions   | 2009 | Financial Management         | You can revise a budget in the Ledger budget form and view the budget changes, as well as the original budget amounts. If you track revisions for a budget, you cannot modify or delete existing budget amounts, but instead, you can create separate budget revision lines in the Ledger budget form.  |
| Quickly view payment history from the Vendors form                                 | 2009 | Financial Management         | Users can now quickly access payments that company have made to a selected vendor using the new Payment history menu option from the Inquiry button in the Vendors form.  |
| Reversing ledger entries   | 2009 | Financial Management         | You now can create reversing entries in the general journal. When a transaction with a reversing date is posted, the original transaction is posted, based on the transaction date, and the transaction reversal is posted, based on the reversing date.  |
| Tax groups for customers and vendors   | 2009 | Financial Management         | You can specify that a tax group is mandatory for customers and vendors. You also can restrict the tax codes that are allowed for customers and vendors, and you can specify a default tax group for customer and vendor groups.  |
| Tax groups for inventory management  | 2009 | Financial Management         | You can specify that a tax group is mandatory for items. You also can restrict the tax codes that are allowed for items, and you can specify a default tax group for the item group.  |
| Track additional vendor profile information  | 2009 | Financial Management         | Several fields are added to the Vendors form, so it is easier to comply with a government contract that requires company to work with a vendor who matches a specific profile.  |
| Tracking a customer using a government ID number                                   | 2009 | Financial Management         | One can now enter a government-established identification number for an organization, it can be assigned to an Accounts receivable customer record as a unique identifier for the record. System can require users to enter the ID numbers always, or only if the customer's credit exceeds a specific amount.  |
| View a check total in the Vendor payment journal report                            | 2009 | Financial Management         | You can view the total number of checks associated with each payment journal in the Vendor payment journal report. Use totals to easily verify that physical checks match total checks.   |
| Assign payment types to methods of payment   | 2009 | Financial Management         | Associate a system-defined payment type, such as Check, Electronic payment, or Promissory note, together with user-defined methods of payment. Use payment types to validate electronic payments, or to add another level of clarification to user-defined methods of payment.  |
| Centralized vendor and customer payments   | 2009 | Financial Management         | Organizations that are comprised of multiple companies can now create and manage payments using a central company. This eliminates the need to enter the same transaction in multiple companies and saves you time by streamlining the payment proposal process, the settlement process, open transaction editing, and closed transaction editing for cross-company payments. Intercompany accounting now includes options to determine which company within the organization will receive the realized gain or realized loss transactions, and how cash discount transactions that are related to a cross-company payment will be handled. |
| Intercompany eliminations  | 2009 | Financial Management         | You can set up elimination rules to create elimination transactions in a company specified as the destination company for eliminations (the elimination company). The elimination journals can be generated during the consolidations process or using an elimination journal proposal.   |
| Automatic allocation processing  | 2009 | Financial Management         | You can define allocation rules to distribute posted amounts to destination accounts or to dimensions at any time from automatically created journal entries.   |
| Sales and purchase orders support multisite and site-specific financial dimensions | 2009 | Financial Management         | Sales and/ or Purchase order default values have been changed to support multisite and to ensure that default financial dimensions can be specific to a site.   |
| Set up reason codes for Accounts receivable  | 2009 | Financial Management         | You can now set up Reason codes using the Reasons form from within Accounts receivable. Reasons are entered for transactions to provide standard explanations and to allow more efficient tracking.   |
| Additions form   | 2009 | Fixed Assets                 | You can track improvements and add-ons to existing fixed assets. In the Fixed assets form, click the Additions button to display the Additions form. The Additions form is useful to track an improvement to an existing fixed asset, such as a paint job, or to track a related asset that cannot exist on its own, such as a battery for a laptop.  |

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| Create new fixed assets from Accounts payable                         | 2009 | Fixed Assets                | For purchase orders for new fixed assets, you can create a new fixed asset in Fixed assets when the packing slip or invoice is posted. When you select the New fixed asset field and then post a packing slip or invoice, a new fixed asset is created with a Not yet acquired status. You can also specify whether posting the invoice changes the status of the new asset to Open and posts an acquisition transaction for the asset. In previous releases, you could create a purchase order only for an existing fixed asset, and posting an invoice always posted an acquisition transaction and changed the asset to an Open status. Use new fields in the General ledger parameters form to specify whether to continue to use the existing method. You can also specify that only a specific user group can post asset acquisitions from purchase orders or invoices, and you can use acquisition proposals in the Fixed assets journal to retrieve purchase invoices that involve an asset. |
| Capitalization threshold  | 2009 | Fixed Assets                | You can specify a Capitalization threshold for an asset group. For assets in the group that cost less than the threshold amount, the Depreciation check box on the Value model form is not selected, and the depreciation will not be taken for the asset. You can also group similar items that you consider as a single asset. To track assets of this type, Quantity and Unit of measure (UOM) fields have been added to the asset record.  |
| Linking assets and projects   | 2009 | Fixed Assets                | You can associate a project with the assets affected by the project. Each phase or task within a project can be linked to one asset. This allows you to quickly review from the asset record a summary of the projects that have caused any type of work, maintenance, or improvement against the asset.   |
| Reverse fixed asset transactions                                      | 2009 | Fixed Assets                | Now there is an automated process to fix posting errors: user can reverse fixed asset transactions except "Inventory to fixed asset" acquisition transactions and all related transactions that were created when the original transaction was posted. Also, for Accounts payable and Accounts receivable transactions that you could reverse in previous versions, you can now reverse those transactions even when fixed assets are associated with them.  |
| Enhanced asset tracking   | 2009 | Fixed Assets                | Three new Fixed asset setup forms are added to Microsoft Dynamics AX: 1) Acquisition methods 2) Asset conditions 3) Major types  |
| Provide reasons for changes   | 2009 | Fixed Assets                | You can now enter a reason for a fixed asset transaction or for a change to the Service life, Depreciation periods, Expected scrap value, and Sales value fields. You can also use the new Change history inquiry option from a value model or depreciation book to view a history of changes to these four fields. More useful than transaction text alone, reasons allow you to view transaction history by reason code and help auditors to reconstruct asset transactions and changes. You can specify whether reason codes are required when you set them up.   |
| Reverse an asset transaction even if it is not the latest transaction | 2009 | Fixed Assets                | In previous versions of Microsoft Dynamics AX, the ability to reverse or revoke fixed asset transactions or Accounts payable and Accounts receivable transactions associated with fixed assets was limited to the last transaction posted to the value model or depreciation book for the asset. That limitation has been removed.   |
| Update replacement costs and insured values form                      | 2009 | Fixed Assets                | In previous releases, user had to manually increase the replacement cost or insured value for each fixed asset, now the replacement cost and insured value for selected fixed assets can be changed using a new Update replacement costs and insured values periodic form. For example, the replacement cost can be increased by three percent for all office furniture.   |
| Performance management  | 2009 | Human Resource Management   | Organization can now implement effective, end-to-end processes and policies in Human resources to improve performance throughout organization. This includes improved tools for identifying, developing, and tracking employee skills, and setting, and monitoring employee goals and activities. Additionally, interaction with compensation management facilitates transparent pay-per-performance guidelines. Transparency in employee goals increases employee focus for the measured activities.  |
| Compensation management   | 2009 | Human Resource Management   | Human resources for Microsoft Dynamics AX now provides a suite of compensation management functionality, including the ability to define various compensation plans for both fixed salaries and variable (or incentive) packages. Organization can run controlled compensation processes, capture compensation transactions that can interact with a performance management system to facilitate pay for performance, and produce comprehensive, easy-to-use reports and analytics. Transparent performance related compensation increases employee focus to the measured productivity areas.  |
| Employee setup  | 2009 | Human Resource Management   | Updated Employee form is single entry for the employee information that integrates with both Human resources and Payroll. Single data entry decreases human errors.  |
| Support for compliance with Form I-9                                  | 2009 | Human Resource Management   | Organization can collect, store, and retrieve information that is needed to support employment processes.  |
| Support for Compliance with the Disabilities Act                      | 2009 | Human Resource Management   | Improve your company's ability to handle requests for special accommodations made by applicants and employees in relation to one or more specific tasks required by a position.  |
| Activity centers for sales and operation plans                        | 2009 | Master Planning             | The activity centers allow demand planners, supply planners, and operational planners to work together to create sales and operations plans.   |
| Create demand and supply plans by using Microsoft Excel               | 2009 | Master Planning             | You can use Microsoft Excel for the following sales and operations planning tasks: 1) Create sales forecasts for individual sales territories and regions by adjusting the base forecast 2) Create a corporate supply plan, based on the demand plan, by adding constraints to resources and adding capacity. 3) Adjust sales forecasts and adjust capacity for supply plans. The individual Excel sheets are updated with data from the analysis server database, and you can then adjust the plans to balance supply and demand.   |
| Improved master planning performance                                  | 2009 | Master Planning             | Improvements to the accuracy and speed of running the master scheduling calculations and master requirement planning (MRP) performance: 1) Bottleneck scheduling - You can designate a work center as a bottleneck, and you can set a bottleneck scheduling time fence to activate finite scheduling for the work center. 2) Master planning helper - You can run concurrent processing of master plan calculations.   |
| Master planning bills of materials (BOM) and route                    | 2009 | Master Planning             | When you run master planning in a multisite environment, the demand at the end item is exploded (driven down to the component levels) according to the dimensions that have been set up for each item, and for the route that is specified for the site.   |
| Master planning in a multisite environment                            | 2009 | Master Planning             | Master planning in a multisite environment is supported by the following features: 1) As part of the coverage settings for an item, you can specify a vendor for specific coverage dimensions. 2) You can define item coverage settings for a subset of inventory dimensions that are set to be master planned by dimension. You can do this manually or using a wizard. 3) In certain situations, you can change the default planned order type that is generated during master planning. 4) To modify coverage settings, you can access the Item coverage form directly from the Net requirements form 5) The Dimensions tab on the Item coverage form shows all of the active inventory dimensions for the selected record  |
| Time zone and delivery date control per site                          | 2009 | Master Planning             | You can specify order entry deadlines per site, which takes into account that sites might be located in different time zones.  |
| Use multiple versions of prices                                       | 2009 | Master Planning             | You can define, maintain, and calculate multiple versions of prices and cost prices when you do your bill of materials (BOM) calculations.   |
| Bill of materials (BOM) and route version selection                   | 2009 | Master Planning             | During planning of materials and resources, the automatic selection of the BOM version and the route version also includes the site, when it is specified. For a BOM version that is not site-specific, you can assign the BOM line consumption to a work center as an alternative to using the issuing warehouse that is stated on the BOM line.  |
| Multisite support for product builder                                 | 2009 | Product builder             | The product builder supports the following configurations: 1) Single site 2) Multiple sites 3) Multisite inactivated. By default, the assignment of site ID on configured bills of materials and routes will originate from the sales order line unless specifically overwritten by product model logic.   |
| Product builder rule debugger   | 2009 | Product builder             | The rule debugger is a support tool for the existing test model functionality in Product builder. The purpose of the tool is to improve productivity when building new product models and reviewing existing models. The rule debugger supports validation of rules, which allows you to efficiently debug the errors in product models and to speed up development of new product models.   |
| Manage the test process and non-conforming products and items         | 2009 | Quality Management Solution | Use quality management to manage the test process and non-conforming products and items, such as damaged or defective goods, and to track and resolve customer or vendor problems, such as product complaints or performance issues.   |



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| Quality management system  | 2009 | Quality Management Solution | The quality management system allows you to define quality standards and testing procedures for your organization. You can track adherence to the standards that you define and manage defective items, performance of vendors, and complaints from customers.  |
| Quality testing requirements set up and management                         | 2009 | Quality Management Solution | Set up and manage the quality testing requirements: Specification of the test instruments used to perform the tests; Identification of test locations; Definition of the test specifications such as sampling, test groups, and test outcomes that determine whether test items meet quality standards; Perform destructive tests; Creation of the quality order (manually or automatically)  |
| Add electronic signatures to manufacturing processes                       | 2009 | Production                  | Electronic signature is now available for the following manufacturing processes: 1) Production orders: Release, Report as finished, Approval 2) Bill of materials: Version approval, Version activate 3) Route: Approval, Version approval, Version activate.   |
| Purchase requisitions  | 2009 | Production                  | Create purchase requisitions to register purchase requirements, after requisitions are approved, purchase orders are created (and may be submitted to vendors) automatically.   |
| Available-to-promise   | 2009 | Production                  | The available-to-promise (ATP) functionality provides an alternative to the current delivery date control functionality for sales orders. The ATP calculation includes not only lead times and available dates, but also planned receipts and issues.   |
| Filter production data by site   | 2009 | Production                  | You can filter production orders and planned production orders by site.   |
| Set up production parameters per site                                      | 2009 | Production                  | You can specify production parameters on a site basis.  |
| Improved job scheduling options with the Gantt chart                       | 2009 | Production                  | Planned scheduling changes are not committed until you submit the changes, which allows you to set up and test various schedules. You can change data in the Gantt chart, evaluate whether the changes should be implemented, and then choose either to save the changes to the database or to discard them.<br>To support the scheduling work, a number of user interface improvements have been implemented, such as the capability to view jobs. The Resource view shows jobs based on work centers, and the Order view shows jobs based on orders.<br>The general Gantt user interface has been improved with features that include an improved display of time scale, colors, and histograms   |
| Integrate costing methods into projects (Project - Production integration) | 2009 | Project Management          | With the integration of Project and Production, you can integrate both the standard and indirect costing methods into the production projects. In addition, you can now display a production order that is linked to a project. When the actual cost of the product or service is posted in Production, the production cost will be added only to the WIP value to cost prices, whereas the accrue revenue and WIP value are accrued in Project to both the cost price and the sales price.   |
| Balance sheet posting of fixed-price and investment projects               | 2009 | Project Management          | You can post costs directly to the balance account on journals instead of only posting the costs to the Profit and loss account   |
| Export data to Microsoft Excel   | 2009 | Project Management          | You can now export calculated data from the Statistics form to Excel and then calculate the statements from all possible views. This can be done with both actual and budgeted amounts.   |
| Project purchase requisition   | 2009 | Project Management          | You can create a purchase requisition for a project, which allows you to charge the cost of a purchase to the project.  |
| Project server integration with Microsoft Office Project 12                | 2009 | Project Management          | With the integration of Microsoft Office Project 12 with Microsoft Dynamics AX Project, you can now create and manage a project that is synchronized between the two systems, based on a shared resource pool. You also can integrate project work for billing and revenue recognition in Microsoft Dynamics AX. Note: This functionality is optional for Project I. To access this functionality, you must be running Microsoft Office Project Server 2007.  |
| Calculate employee and hour utilization                                    | 2009 | Project Management          | You can measure the efficiency and billable rate on hours for employees and projects.   |
| Export to Excel with Project control                                       | 2009 | Project Management          | You can export the data in the forms under Project control into Excel.  |
| User-defined stages for projects   | 2009 | Project Management          | You can use project stages as a guide to the project life cycle. As project stages are defined, you can activate tasks and assign them to specific project stages. You also can create additional stages and assign customized labels throughout the project.   |
| Track and control project costs  | 2009 | Project Management          | You can track project costs and efficiency while the project is still in process, which can help you to estimate the total expected cost of the project.  |
| Price group support  | 2009 | Project Management          | You can create price groups as part of trade agreements to assign to projects, invoice projects, and customers. A trade agreement can apply to a specific project or customer, to multiple projects or customers, or to an invoice project or multiple invoice projects (for Time and Material and Fixed Price). By assigning price groups to projects, invoice projects, or customers, the valid sales prices are available automatically when journal transactions are created for hours, expenses, fees, and subscriptions.  |
| Create and maintain service orders via Web portals                         | 2009 | Project Management          | Two service portals are provided. The customer portal allows service customers to create service orders and track the status of their service orders via the Internet. Field technicians can use the technician portal to create or modify service orders, service order lines, repair lines, and to view service agreements, service objects, and service tasks. Service orders entered on the service portals are displayed in Microsoft Dynamics AX, and the service dispatcher can acknowledge and verify incoming service orders, transfer them to the Service orders form, and assign them to technicians.  |
| Value inventory by standard costs  | 2009 | Project Management          | When you assign costs, the change immediately will affect your inventory value. You can value your inventory and work in process (WIP) according to the standard cost price, thus making manual adjustments unnecessary to comply with GAAP. This also applies to tracking variance on production, purchase price, and invoice price.   |
| Monitor cash flow  | 2009 | Project Management          | You can calculate the cash flow of any project at any time. You also can print reports to see an overview of a single project or of multiple projects. The cash flow then can be transferred to General ledger cash flow.   |
| Integration between Sales and Service                                      | 2009 | Project Management          | Service agreements and service orders can be created directly from a sales order. Items that are applied as spare parts in service orders or service agreements now can be identified by unique serial numbers. You can see what replacements were made within a specific period for a specific item and how the replacements were handled. You can reserve items in inventory to be applied as spare parts.  |
| New dispatch board to control service order activities                     | 2009 | Project Management          | You can use the dispatch board, which is a graphical overview that lists service order activities, to understand the flow of services, and use your mouse to control the flow of service orders and service order activities. You can prioritize service orders by urgency, use various types of service activities, and associate each service order with a preferred technician and a preferred date and time. You can complete the following tasks from the dispatch board: Display service orders within a date interval; Identify the priority of a service order or distinguish between activity types by using different color schemes; View dispatch teams with associated employees; Reassign activities using drag-and-drop and update service orders accordingly; Reset and undo changes; View service orders that have not been dispatched. |
| Service level agreement  | 2009 | Project Management          | Service companies can apply a time limit for when a service request must be completed, the time spent on completing service orders can be recorded, and compliance with the time frame set in the service level agreement can be monitored. You can enter reasons for exceeding the time limit of a service level agreement and print reports that provide information about assignments of service level agreements and about recorded starting and ending times of service orders.  |
| Enhanced XML documents to support multisite and new fallback warehouse     | 2009 | Warehouse Management        | To handle cases where site and warehouse is mandatory information, all XML documents are evaluated to verify if site and warehouse information is included when reading data. In cases where warehouse is not included, the fallback warehouse is used. The fallback warehouse is defined as part of the company information.   |
| Production cost variances  | 2009 | Warehouse management        | You can calculate and enter distinct production variances for lot size, price, quantity, and substitution variances per cost group.   |
| Keep inventory dimensions consistent within lots                           | 2009 | Warehouse Management        | The inventory dimension framework is enhanced so that item dimensions (size, color, configuration) and the storage dimension, site, are kept the same for a source transaction and any inventory transactions that are generated with the same lot ID   |

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| Multisite and intercompany orders   | 2009 | Intercompany            | The total and the multiline discounts are calculated automatically when you create an intercompany purchase order from an original sales order. Previously, the purchase price, discounts, and automatic miscellaneous charges were calculated automatically, but you had to calculate the total and the multiline discounts manually for each order line when a purchase order was created from a sales order. The total and the multiline discounts are also calculated automatically for the intercompany purchase order when you create the order from an intercompany sales order and the Price & discount search check box is selected for the Purchase Requisition action in the Intercompany action policy form.  |
| A financial dimension is linked to inventory-related transactions         | 2009 | Supply Chain Management | You can configure a link between a financial dimension and the site inventory dimension. This allows you to trace profit and loss figures directly to an operational site, and still conduct your official financial reporting at the company level.  |
| Accounts receivable invoice hold  | 2009 | Supply Chain Management | You can place an Accounts receivable transaction on hold and prevent it from being posted until a future date that you specify in the Release date field. Placing a transaction on hold makes the unposted transaction available for review and analysis.   |
| Add miscellaneous charges to a purchase order invoice                     | 2009 | Supply Chain Management | One can now add or change miscellaneous charges during the process of invoicing a purchase order.   |
| Advanced on-hand form   | 2009 | Supply Chain Management | You can use the Advanced on-hand form for sales activities, such as promising orders. The form provides an overview of item availability and the various sourcing options that can be used to fulfill a customer requirement.   |
| Changes to the Purchase order and Posting forms                           | 2009 | Supply Chain Management | A number of usability enhancements have been made to the Purchase order form and the Posting form to increase user productivity.  |
| Changes to the Sales order and Posting forms                              | 2009 | Supply Chain Management | A number of usability enhancements have been made to the Sales order form and the Posting form to increase employee productivity.   |
| Post invoices based on packing slips                                      | 2009 | Supply Chain Management | You can post sales or purchase order invoices, based on packing slips or on a selection of packing slips and shipping dates. It is also possible to summarize sales order invoices based on a packing slip number.  |
| Different costs and prices on different sites                             | 2009 | Supply Chain Management | You can use different planned costs and prices for items and different cost category rates (rate and indirect costs) or ratios across the various sites within the company.   |
| Improved standard cost  | 2009 | Supply Chain Management | You can activate and use multisite functionality with the standard cost inventory model.  |
| Request for quotes  | 2009 | Supply Chain Management | One can send a request for a quote to a vendor to request information about prices and delivery times for multiple items.   |
| Separate layout for free text invoices                                    | 2009 | Supply Chain Management | The process that generates free text invoice documents is now separate from the sales order invoice document process. Sales order invoices and free text invoices can be customized independently of each other, which allow users to specify content, notes, and print management setup for free text invoices.  |
| Shipping carrier integration  | 2009 | Supply Chain Management | Shipping software integration to provide information, such as freight charges and tracking numbers; the information is then automatically transferred into sales orders and invoices, saving manual information entry efforts and decreasing errors.  |
| Specify item settings per site  | 2009 | Supply Chain Management | You can define item master settings that are used when orders are created and generated at the site level.  |
| Accounts payable invoice matching   | 2009 | Supply Chain Management | Quickly match vendor invoice information to the related purchase orders and packing slips. Specify price tolerances for the system to automatically check prices and quantities on the invoice to be sure that they match what was expected, based on the purchase order and the packing slip.  |
| Credit cards preapprovals and approvals                                   | 2009 | Supply Chain Management | Preauthorize credit card payments for sales orders: verify the credit card information and reduce the customer's available credit for the card used; when the order is fulfilled, the credit card is billed for the amount of the transaction.  |
| Improved inventory closing  | 2009 | Supply Chain Management | The labels on the buttons in the Closing and adjustment form have been changed, so the steps in the closing process are easier to understand. The new design of the batch framework helps to secure the running of an inventory closing in a batch, and the helpers for the closing will now be started automatically.  |
| Improved weighted average performance                                     | 2009 | Supply Chain Management | If you are costing your inventory based on the weighted average inventory models, the inventory closing process has been improved to introduce better accuracy and faster run time on high-volume items.  |
| Product and category catalogs for purchase requisitioning                 | 2009 | Supply Chain Management | It is now possible to create dedicated product catalogs for purchase requisitioning where companies define which items must be available when creating purchase requisitions. It is also possible to create categories for non-catalog items and make them available for use in purchase requisitions.  |
| Request for quote supports multisite usage                                | 2009 | Supply Chain Management | The new request for quote feature has been updated to reflect the new inventory dimension site and to ensure that default financial dimension can be implemented for specific sites.  |
| Save a vendor invoice for a purchase order                                | 2009 | Supply Chain Management | User can now save a vendor invoice for a purchase order in the Posting invoice form and post it later (no need to repeat invoice preparation). User also can match packing slips that are connected to a purchase order with the invoice.   |
| Use bill of material (BOM) levels to control production at multiple sites | 2009 | Supply Chain Management | For multiple sites that share item numbers, you can set up the BOM and the route so that components can be produced at different sites.   |
| Specify mandatory inventory dimensions                                    | 2009 | Supply Chain Management | You can configure certain inventory storage dimensions to be mandatory for a dimension group. When you create a journal or a transaction, you must specify the dimension.   |
| Changes in the Create purchase order and Create direct delivery forms     | 2009 | Supply Chain Management | The Create direct delivery and Create purchase order forms have been modified, so now you can select a preferred vendor per site, warehouse, size, color, and configuration. Furthermore, the forms have been changed to support multisite usage and a new Price/Discount tab has been added to view price and discount information.  |
| Create and print sales order posting documents per site                   | 2009 | Supply Chain Management | You can create posting documents for sales orders as site-specific documents or as documents that represent the company as a whole.<br>You can create individual picking lists, packing slips, and invoices per site for the sales order lines that will be delivered from the individual sites.<br>The picking list and the packing slip can be created only for a specific site because they list items that are physically located at the site, whereas invoices can be either site specific or they can cover deliveries from more than one site.<br>Quotations and confirmations are company-specific documents that you create for the company as a whole, so customers receive only one quotation or confirmation document. Quotations and confirmations cannot be site specific.            |
| Profit and loss accounts for item transfers                               | 2009 | Supply Chain Management | After you have created the site-specific documents, they can be directed to a local printer using the extended print management feature.<br>When you transfer items, general ledger posting to specified transfer profit and transfer loss accounts occurs in either of the following situations: 1) When issue and receipt sites differ 2) When issue and receipt item dimensions differ.  |
| Improved transparency of the return process                               | 2009 | Supply Chain Management | The transparency of the return process is improved for employees who handle incoming goods, as well as for employees who handle the crediting of the returned items. From the new Item arrival form, which you will use to track incoming goods, you can register and update customer returns, along with other receipts in the warehouse. The employee who is responsible for receiving goods in the warehouse can easily retrieve RMA numbers and identify expected returns. You control the process of returning items, and easily update returned items, based on the packing slip. Then you can create replacement orders. You also can create quarantine orders as they are needed for returned items that need inspection and for the disposal process, and then create a replacement order. |
| Plan for the arrival of expected items                                    | 2009 | Supply Chain Management | A new form is available that you can use to estimate and plan the resource capacity that is necessary to efficiently handle incoming goods. Registering the arrival of new items also is easier because much of the required information, such as location and warehouse, is based on the previous setup and is available automatically during the arrival registration process.  |

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| Refill and pallet transport improvements         | 2009 | Supply Chain Management     | <p>The processes of refilling pallets and transporting pallets of items have been enhanced so that you can move less than a full pallet from the bulk location to the picking location. This means that it is easier to ensure that the picking location is always adequately stocked and ready to fulfill customer requests, which is especially useful when the picking location has less capacity than the bulk location.</p>  |
| Easier shipment handling                         | 2009 | Supply Chain Management     | <p>The following changes have been made to make handling shipments easier: 1) You can create a batch for reservations to include all consolidated shipments that have the appropriate status. 2) You can post sales orders and transfer orders that are ready for physical update in a batch, based on shipment information, and you can monitor the status of the shipment. 3) You can ship transfer orders that are ready to be updated in batches.</p>   |
| Outbound process changes                         | 2009 | Supply Chain Management     | <p>The number of enhancements have been made to the outbound process from picking to loading of shipments: 1) Configure outbound rules - Configurable outbound rules make it easier to automatically send and print relevant shipment documents. 2) Pick an item - After picking an item, the warehouse worker can specify where items that have been picked should be delivered for the next step in the outbound process or to internal production. 3) Deliver an item - When items have been delivered to the outbound dock, the warehouse worker can evaluate whether repacking or consolidating shipments is required. Features that pertain to loading and unloading shipments allow the warehouse worker to control the last step in the outbound process. 4) Create shipments -The template to use for shipments that are created automatically is now controlled by explicitly defining priorities for templates. You can add output orders to a shipment up until and including the stage when the shipment has been packed. However, you can set up and define how late in the process that automatic additions should be allowed. 5) Reserve shipments - The reservation process has been improved to give the shipping manager control of which warehouse to reserve items at, as well as which of the six reservation methods to use. If all items have not been reserved, you can rerun the shipment reservation to include partial reservations and to add items to an ongoing shipping process. Picking can be started of the items that are on-hand, even if the complete shipment has not been reserved. If multisite is activated, reservations can be only from warehouses within the same site. 6) Pick items across modules - Three different methods of picking have been merged into one picking method, so that orders are handled in the same way for sales order picking, transfer order picking, and warehouse management picking. A new picking registration form has also been created 7) Picking process - The process of updating all items as picked when they are from the same location has been improved by allowing multiple lines to be selected and picked in one operation. 8) Picking location refill has been improved by automatically activating a refill pallet transport in cases where a shipment reservation results in items missing in the picking location. Output pallet transports are no longer controlled by the inbound pallet quantity set up for an item, but can be defined separately.</p> |
| Enterprise Portal User interface enhancements    | 2009 | Enterprise Portal Framework | <p>More interaction, consistency, user can perform actions on selected items in lists, including list previews, and lists can now be sorted, filtered, and grouped. List views can be changed. Users with access to multiple companies can change companies in Enterprise Portal by selecting a different company from a menu. If organization deploys Role Centers in Enterprise Portal, users can view graphs, charts, list, and reports. If organization uses Microsoft Office SharePoint Server, users can also view key performance indicators and activity cues.</p>  |
| Enterprise Portal administration enhancements    | 2009 | Enterprise Portal Framework | <p>Enterprise Portal site creation and deployment is now a one-click process.: it is now installed using the Setup wizard; AXSetup.exe utility automates the process of configuring the proxy in various locations on the Enterprise Portal server, creates an Enterprise Portal site, extends that site in SharePoint services, and deploys the site.</p>  |
| Enterprise Portal now supports multisite usage   | 2009 | Enterprise Portal Framework | <p>Enterprise Portal functionality used by sales representatives, customers, and vendors has been changed to support the new multisite feature.</p>   |
| Set upper diem rules                             | 2009 | Expense Management          | <p>The implementation of per diem rules gives you more flexibility and makes it possible to create per diem rules around multiple sets of criteria, such as different countries</p>   |
| Personal expense options                         | 2009 | Expense Management          | <p>Company can select to pay the personal expenses and then debit the employees account for the transaction amount, or can choose to not pay the personal expenses, but create a report that shows that personal expenses were charged on the expense report.</p>   |
| Define and apply policy violations               | 2009 | Expense Management          | <p>Define the minimum and maximum values to be entered against expense types and system would automatically flag any user who abuses these policies. With this feature in place, a user will not be allowed to submit an expense report that violates the policies set for expenses.</p>  |
| Import credit cards                              | 2009 | Expense Management          | <p>Employees may import credit card and travel account transactions to their expense reports.</p>   |
| Enter expenses in Enterprise Portal              | 2009 | Expense Management          | <p>Employee can flexibly enter work expenses in Enterprise Portal. Expense reports can also be submitted, approved, or rejected. Approved reports can be transferred back to the general ledger in the Microsoft Dynamics AX client.</p>  |
| Use the Hotel wizard to itemize expense reports  | 2009 | Expense Management          | <p>You can now itemize your hotel bills into line items when creating an expense report. The cost of the hotel stay can be separated, as well as other costs incurred such as broadband internet use and room service.</p>  |
| Expense management workflow                      | 2009 | Expense Management          | <p>You can define the approval workflow process for your organization, based on predefined rules. Notifications and workflow actions can be added to the process to ensure that all the correct steps are taken in the expense report submittal and approval process.</p>   |
| Category integration with Project and Production | 2009 | Expense Management          | <p>Overlapping tables have been combined to make the integration of expense types and categories more manageable.</p>   |
| Split expenses at the transaction level          | 2009 | Expense Management          | <p>One can split expenses at the transaction level across projects, accounts, and dimensions and can see the transactions in the Expense report form.</p>   |
| View expense reports from General ledger         | 2009 | Expense Management          | <p>As you view voucher transactions in General ledger, the inquiry is at a very high level. However, now you can open the original expense report from within General ledger to see detailed information about the voucher without having to search for the correct expense report.</p>   |
| Case Management in the Rich Client               | 2012 | Sales and Marketing         | <p>Companies frequently experience customers who contact the company to resolve a problem, to have their questions answered, replace bought items, and so on. The Case management functionality registers such cases enabling for the registration, assignment, planning, resolution, follow up and analysis of cases.</p>  |
| Knowledge Articles                               | 2012 | Sales and Marketing         | <p>Much knowledge is accumulated over time in the organization, and this knowledge should be available to Customer Service Representatives while they perform their job. Easing the path of solving a specific case requires quick access to documents, links, and other information that are grouped logically. Knowledge articles let users quickly benefit from the accumulated organizational knowledge of the company while they are handling cases and employing teams of people to resolve cases.</p>  |
| Action Pane Strip                                | 2012 | Core                        | <p>The new Action Pane strip control provides an action presentation that resembles the Microsoft Windows 7 Windows Explorer bar. The Action Pane strip control can be used at the top of forms that do not have sufficient actions to justify the use of a full action pane. They are also used within the form to position actions close to their related records and data fields.</p>  |
| Document View                                    | 2012 | Core                        | <p>The concept of a document view is introduced into client forms to provide developers and users the ability to have a read-only representation of data that reduces the risk of accidental changes.</p>   |
| Jewel Menu                                       | 2012 | Core                        | <p>The Jewel menu replaces the Microsoft Dynamics AX menu which was available in earlier versions of the workspace. It also provides drop-down menus which inearlier versions were at the top of each form.</p>   |
| Navigation Pane                                  | 2012 | Core                        | <p>The Navigation Pane is redesigned to provide navigation options that are more visually appealing and usable. In earlier versions there were three panes which displayed Favorites, Places, and Forms, and now they are condensed into a single pane that flows and scrolls as one unit. This makes it easier to control and customize.</p>   |
| Preview Panes                                    | 2012 | Core                        | <p>The Preview pane component displays more information about the selected record in a List Page.</p>   |
| Fast Tabs  | 2012 | Core                        | <p>A Fast Tab is a new vertical presentation style for the existing tab control. Fast Tabs are used in the Windows 7 and Microsoft Office when lots of data must be displayed in a highly accessible way. Fast Tabs display tab pages in a vertical sliding way to activate the options in the following list:</p> <ul style="list-style-type: none"> <li>More than one tab page can be displayed at a time.</li> <li>Longer, more explanatory tab page names are provided to the user.</li> <li>The display of summary fields that give the user information from the tab page without having to be expanded.</li> </ul>   |

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| Grid Check Boxes                           | 2012 | Core | In earlier versions, the gray box-shaped row labels were displayed on the left side of each grid row. Now they are replaced with grid check boxes that resemble those found in Windows Explorer in Windows 7. Grid check boxes are a visible indication to users, that they can select multiple records and even select all records, if it is necessary.   |
| Enhanced Previews                          | 2012 | Core | Improved previews are displayed to the user when they rest the mouse pointer over any foreign key field or over any control on which the developer has set the properties.   |
| Segmented Entry Control                    | 2012 | Core | <p>Segmented entry control simplifies the task of entering complex account and dimension combinations. The following list describes how account and dimension data entry is improved.</p> <ul style="list-style-type: none"> <li>○ A simple cheat sheet window shows the user-defined title for each segment.</li> <li>○ Recent values entered by the user for the current segment are displayed.</li> <li>○ A lookup window lets the user select from a list of valid values or all values for the current segment.</li> <li>○ Instance specific options for a control include the ability to turn off the recent entries window.</li> <li>○ The ability to show only abbreviated values (six characters) for nonfocused segments.</li> <li>○ To provide improved readability, both the cheat sheet and lookup windows open up aligned to the currently focused segment.</li> </ul>   |
| Organization Model                         | 2012 | Core | <p>Microsoft Dynamics AX 2012 introduces new organizational modeling capabilities. This helps make your organization structure easier to manage by providing the following benefits.</p> <ul style="list-style-type: none"> <li>○ More organization types</li> <li>○ Security more independent of the organization structure</li> <li>○ Addition of organization hierarchy</li> <li>○ Data sharing between organizations</li> </ul>  |
| Organizational Hierarchies                 | 2012 | Core | You can set up organizational hierarchies to view and report on different perspectives of your business. Organizations in a hierarchy can share parameters, policies, and transactions. An organization can inherit or override the parameters of its parent organization.   |
| Help System                                | 2012 | Core | A new Help system is used to supply Help documentation for the application and development workspaces. You can add new help content by adding correctly formatted HTML files to the help server. No compilation, rebuilding, or AOT deployments are necessary to add Help documentation.   |
| Post-Dated Checks                          | 2012 | Core | <p>The PDC functionality is available on both the Accounts receivable and Accounts payable modules and fully integrates with dimensions, check printing, centralized payments, settlements, and the standard banking functionality available in Microsoft Dynamics AX 2012. The following list is a high level overview of the features that are included with the PDC functionality:</p> <ul style="list-style-type: none"> <li>○ Independently activate or deactivate PDCs in Accounts receivable and Accounts payable.</li> <li>○ Independent clearing accounts for issued and received post-dated checks.</li> <li>○ Separate clearing accounts for withholding taxes.</li> <li>○ Settlement of the PDC against one or more transactions. This includes cross company transactions when centralized payments are used.</li> <li>○ Canceling a PDC.</li> <li>○ Identifying PDCs maturing on or before a specified date.</li> <li>○ Support for creating PDCs with installment schedules.</li> </ul> |
| Compliance and Internal controls           | 2012 | Core | One challenge that customers face today is identifying which controls to use to make sure that their business complies with laws, business rules, policies and regulations. The Default controls library, introduced in Microsoft Dynamics® AX 2012, contains many of the most frequently used controls. This library provides a resource for customers who are searching for various types of controls that will help meet their needs.   |
| Invoice Matching Task for Workflow         | 2012 | Core | Invoice matching is now available as a workflow task that can be performed without user interaction. The workflow can be started, based on a Microsoft Dynamics AX business event, such as when new records are created by using the vendor invoice service. Vendor portal scenarios and import scenarios in which vendor invoices are processed without requiring user intervention are supported.  |
| Workflow for Free Text Invoices            | 2012 | Core | The standard Microsoft Dynamics AX 2012 workflow framework is extended to work for free text invoices. This framework enables users to decide whether a review process should be required on free text invoices.   |
| Microsoft Office Add-Ins                   | 2012 | Core | <p>Office add-ins lets a user export and import data. The four main uses for the Microsoft Add-ins are as follows:</p> <ul style="list-style-type: none"> <li>○ Lightweight reporting: From any grid in the client or Enterprise Portal, export data, extend and build upon it in Excel, then update as conditions change.</li> <li>○ Editing data in Excel: Update Microsoft Dynamics AX 2012 data by using the Excel add-ins.</li> <li>○ Import data by using Excel: Excel can be used as a template to collect reference and master data to be imported into Microsoft Dynamics AX 2012.</li> <li>○ Templates and documents: Incorporate Microsoft Dynamics AX 2012 data in Word or Excel documents (for example: collection letter, quotation, sales forecast, project forecast, aging report, and so on.)</li> </ul>  |
| Document Handling                          | 2012 | Core | Document handling is improved in Microsoft Dynamics AX 2012 to include support for URLs and a document file web service. The improvements can ease the document handling process for companies that are geographically dispersed and that want to maintain their paper-based documents in one location.  |
| Send an Email Message                      | 2012 | Core | From the Collections form, you can send an email message through Office Outlook. You can also automatically attach information about selected transactions or customer statements as a Microsoft Office Excel attachment.  |
| Shared Worker Information                  | 2012 | Core | In Microsoft Dynamics® AX 2009, it was necessary for users to log in and out of companies to maintain employees, applicants, and other employee related data. To streamline the user experience for these processes, the data in Microsoft Dynamics AX 2012 is shared across all legal entities in an installation. Approximately 175 tables are shared in the HRM module in Microsoft Dynamics AX 2012. The Employee form is replaced with the new Worker form in Microsoft Dynamics AX 2012. A worker can be an employee or contractor. Improvements are made to help improve the processes around tasks that are related to employees and contractors.  |
| Status Bar                                 | 2012 | Core | The status bar can be personalized by the user   |
| Vendor Invoice Processing Workflow         | 2012 | Core | <p>Two new workflow types, Vendor invoice and Vendor invoice line, let users create user-defined workflows for vendor invoices. The workflow type contains the following elements:</p> <ul style="list-style-type: none"> <li>○ Approval elements for creating approval tasks.</li> <li>○ A task element for use in completing and correcting vendor invoices.</li> <li>○ Automated tasks that can be run programmatically without requiring user intervention, to perform selected validations, and to post the vendor invoices.</li> </ul>   |
| Work Items                                 | 2012 | Core | The concept of work item queues is introduced in Microsoft Dynamics AX 2012 to provide an alternative assignment and management model for task elements in workflows. Workflow tasks can now be managed by a team by using a shared work list.   |
| Workflow for Travel and Expense Management | 2012 | Core | <p>Microsoft Dynamics AX 2012 provides an option to automate the process of posting by making posting a part of the expense work flow itself. In addition, Microsoft Dynamics AX 2012 enables queuing for two of the expense workflow types (templates):</p> <ol style="list-style-type: none"> <li>1. Expense Reports</li> <li>2. VAT Recovery</li> </ol>   |
| Workflows for Budget Register Entries      | 2012 | Core | When you create budget register entries, you can set up workflows so that a budget manager can approve the budget register entry. If you use workflow, when transfer rules are violated, the budget register entry can be assigned to a specific person for approval.  |

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| Accounting Distributions                     | 2012 | General ledger | When you define how to account for an amount on a source document line, the accounting distribution may be split based on percentage, quantity, or amount.   |
| Prepaid Purchase Orders                      | 2012 | General ledger | A new feature is introduced in Microsoft Dynamics AX 2012 that helps automate a process for making a prepayment for a purchase order. This feature allows for the prepayment to be settled against the purchase order to help prevent over or double payment.  |
| Customer Pools                               | 2012 | General ledger | You can set up customer pools to represent groups of customers. You can use customer pools as filters for the customer information about collections in list pages, in the Collections form, or when you create aging snapshots.   |
| Creating and Assigning Collection Agents     | 2012 | General ledger | A collections agent is a person who works with customers to make sure that payments are collected in a timely manner. In Microsoft Dynamics AX, collections agents are employees and contractors that have a user relationship with a Microsoft Dynamics AX user. You can assign a customer pool to a collection agent.  |
| Aging Period Definitions and Snapshots       | 2012 | General ledger | You can use the Aging period definitions form to analyze the maturity of customer accounts and vendor accounts, based on a date that you enter. An aging snapshot form contains the calculated aged balances for a group of customers at one point in time.  |
| Cases and Activities                         | 2012 | General ledger | Use cases to organize collections activities and transactions. For example, if you have to collect for three transactions, you can add them to a case, and then manage activities that are related to your collections work on those three transactions together.  |
| Perform Write-Offs                           | 2012 | General ledger | You can write off bad debts by clicking Write off in the Collections form, and on the Collections, All customers, and Open customer invoices list pages.   |
| Customer Invoice Correction Process          | 2012 | General ledger | New Correct Invoice button is added to the Free text invoice details form and the Free text invoice list page. A new form will open where the user can adjust the necessary information and then post the correction.  |
| Recurring Free Text Invoice Process          | 2012 | General ledger | In Microsoft Dynamics AX 2012, a new feature is introduced to let you set up a customer to be billed on a recurring basis.   |
| Free Text Invoice Quantities and Unit Prices | 2012 | General ledger | Frequently, a free text invoice line can be used to sell a quantity of a kind of goods, services, or rights. Providing this information to the user and a basic amount calculation in Microsoft Dynamics AX 2012 will help better identify and explain charges to customers.   |
| Currencies and Exchange Rates Setup          | 2012 | General ledger | In Microsoft Dynamics AX 2012, currencies and exchange rates can be shared across all legal entities. This means that you can set up or maintain currencies that are available for use in all legal entities that make up the organization.  |
| Asynchronous Processing                      | 2012 | General ledger | Asynchronous processing is useful when you are processing a large volume of source documents. It enables the processing to be scheduled and the user to return to data entry more quickly.   |
| Multiple Charts of Accounts                  | 2012 | General ledger | It is common for large organizations to have the same chart of accounts that is used across multiple legal entities. This feature is included in Microsoft Dynamics AX 2012 and lets you define legal entity specific data, such as the default sales tax code on the main account or the ability to inactivate a financial dimension value for a specific legal entity.   |
| Commitment Accounting                        | 2012 | General ledger | Commitment accounting enables the recording of a commitment in the general ledger for future or planned expenses before the creation or collection of the underlying documents, such as, invoices or purchase orders, before those committed funds are paid out.   |
| Invoice Matching Improvements                | 2012 | General ledger | <p>In Microsoft Dynamics AX 2012, the Invoice Matching framework is extended to support several new matching scenarios. The new types of invoice matching include the following:</p> <ul style="list-style-type: none"> <li>Extended price matching</li> <li>Invoice total matching</li> <li>Line matching <ul style="list-style-type: none"> <li>Two-way matching</li> <li>Three-way matching</li> </ul> </li> <li>Miscellaneous charge matching</li> </ul>   |
| Shared Fiscal Calendars                      | 2012 | General ledger | <p>In Microsoft Dynamics AX 2012, fiscal calendars are now shared across multiple legal entities. The benefits of sharing fiscal calendars include the following:</p> <ul style="list-style-type: none"> <li>Supporting multiple fiscal calendars for each legal entity. For example, for fixed assets that you may require two calendars one for auditing and one for tax. This lets you run parallel depreciations.</li> <li>Sharing fiscal calendars across multiple legal entities. This reduces how much setup is required for each legal entity.</li> </ul>  |
| View and Manage Collections Information      | 2012 | General ledger | Use the Contacts Fact Box to view collections contact information for the customer. Use the Aged balances Fact Box to view aged balances for the customer, based on the selected aging period definition. Use the Credit information Fact Box to view the credit limit and current balance information for the customer. The Change status button lets users update the status of each transaction to track the state of the transaction.  |
| Subledger Accounting                         | 2012 | General ledger | Improvements are made for previewing and updating the accounting entries in the subledger before journalizing a source document in Microsoft Dynamics AX 2012. The subledger journal entries provide the preview of the accounting entry, and the accounting distributions can be used to correct the subledger journal entry to make sure that the correct ledger accounts are being updated. Options are also now available for how the subledger journal entries will be transferred to general ledger: synchronously or asynchronously, also whether in detail or summary.   |
| Financial Dimensions Default Templates       | 2012 | General ledger | Use this form to create a template of percentage and financial dimension value combinations. The information in the template will be used to display default financial dimension values when you distribute source document amounts.   |
| Financial Dimensions                         | 2012 | General ledger | <p>The following are the main features and changes that are made to financial dimensions in Microsoft Dynamics AX 2012:</p> <ul style="list-style-type: none"> <li>The Financial dimension wizard is removed. The user can create and rename financial dimension in a form, exactly like other base data entities. It is no longer required to synchronize the database when adding a new financial dimension.</li> <li>Valid from and to dates on each financial dimension value.</li> <li>The users can mask the financial dimension. The mask is used to validate the financial dimension value.</li> </ul>   |
| Advanced Rule Structures for Ledger Posting  | 2012 | General ledger | You can use advanced rule structures to link a financial dimension or multiple financial dimensions to an account number or range of account numbers so that additional information can be collected for reporting and analysis.   |
| Ledger Account Alias                         | 2012 | General ledger | You can set up ledger account number aliases to provide a shortcut to a complete account number or a partial account number. You can also define a date range on an account that will be used to determine whether an account is valid for entry and posting and define an account mask to dictate the format of account values (length, symbols, alpha-numeric values, and so on).  |
| Accounts Receivable Features                 | 2012 | General ledger | <p>The Accounts receivable module is updated in several key areas to help improve efficiency.</p> <ul style="list-style-type: none"> <li>Free text invoice improvements <ul style="list-style-type: none"> <li>Addition of billing codes to define a specific line item charge, including definable rate calculations and fields</li> <li>Addition of billing classifications to organize free text invoice receivables</li> </ul> </li> <li>Ability to process documents by billing classifications</li> <li>Ability to support settlements in a pooled cash setup</li> <li>Addition of customer reporting attributes for United States (U.S.) governmental reporting requirements</li> </ul> |
| Define Budget Funds Available Calculation    | 2012 | General ledger | The Budget funds available tab on the Budget control configuration form is used to define the budget funds available calculation.  |

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| Define Budget Checking Rules              | 2012 | General ledger | The Source documents tab on the Budget control configuration form is used to define which business documents should validate against the budget control configuration.   |
| Define Budget Cycles                      | 2012 | General ledger | Budget cycle time spans define the length of a budget cycle. Budget cycles are associated with the periods in a fiscal calendar and can be shared across legal entities. Budget cycles determine the starting and ending periods for budget control.   |
| Budget Amounts                            | 2012 | General ledger | The budget data is entered through the Budget register entry form which consists of a header and lines. The header information is applied to the whole budget register entry and the lines (account entries) are where budget amounts for specific dimension combinations are entered.   |
| Budget Reporting                          | 2012 | General ledger | The following new budget reports are included in the Budgeting module in Microsoft Dynamics AX 2012 for a better and transparent reporting: <ul style="list-style-type: none"> <li>o Actual versus budget report</li> <li>o Budget funds available report</li> <li>o Budget detail report</li> </ul>   |
| Budgeting Features                        | 2012 | General ledger | The Microsoft Dynamics AX 2012 Budgeting module improvements are designed to incorporate public sector budgeting requirements. The public sector industry solution is improved in several key areas to help organizations achieve better budgetary control. <ul style="list-style-type: none"> <li>o Apportionment budget types</li> <li>o Provisional budgets</li> <li>o Budget carry-forward at year end</li> </ul>  |
| General Ledger Features                   | 2012 | General ledger | The General ledger module is updated in several key areas to help public sector organizations improve efficiency and process flows. <ul style="list-style-type: none"> <li>o General ledger year-end processing improvements. With the General ledger year-end process, you can select accounts by fund for year-end closing and close the selected accounts to different equity accounts.</li> <li>o Ability to transfer purchase order encumbrances across fiscal years</li> <li>o Introduction of a fund entity that defines multiple sets of books within the same Legal Entity. It is also typically used as an account dimension, and offers the ability to require that journal entries balance by fund.</li> <li>o Ability to correct, adjust, and reclassify transactions by using advanced ledger entries</li> <li>o Additional attributes can be added to financial transactions to help perform more detailed analysis. Derived financial hierarchies let you create financial categories that are separate from financial dimensions, but linked to them. This lets you derive the financial categories from the financial dimensions for analytics.</li> </ul> |
| Procurement and Accounts Payable Features | 2012 | General ledger | The Procurement and sourcing and Accounts payable modules are updated in several key areas to help public sector organizations improve efficiency process flows. <ul style="list-style-type: none"> <li>o Ability to allocate percentages of vendor invoices to specific bank accounts</li> <li>o Addition of DUNS and +4 DUNS fields to the Vendor bank accounts form</li> <li>o Addition of U.S. 1099-S and 1099-G tax statements</li> <li>o Ability to track unplanned purchases. In an emergency or special circumstance, you might create an order that circumvents the typical purchasing process.</li> <li>o Purchase agreement improvements <ul style="list-style-type: none"> <li>- Based on purchase agreement classification, selected new data groups and sub-tables may be enabled on the purchase agreement. This includes Subcontractors, Certifications, and Activities</li> <li>- Ability to process an invoice directly against a purchase agreement without first requiring creation of a release purchase order.</li> </ul> </li> </ul>  |
| Budget Transaction Web Services           | 2012 | General ledger | Budgets are frequently created outside Microsoft Dynamics AX by using varous budget formulation tools and software. If you are using Microsoft Dynamics AX 2012 budget control functionality, you may have to bring this information into Microsoft Dynamics AX. In addition, you may want to create, update, delete, and read existing budget register entries from a third-party product. This feature provides a web service for budget register entries to communicate with the third-party applications and enables organizations to Create, Read, Update, and Delete budget register entries.  |
| Dimensions for Budgets                    | 2012 | General ledger | The process of defining dimensions for budgets enables an organization to determine which dimensions within the account structures associated with the chart of accounts are available for budgeting.  |
| Budget control configuration              | 2012 | General ledger | Budget contron configuration is now available in AX 2012.  |
| Using Budget Control                      | 2012 | General ledger | When budget control is configured, source documents and accounting journals can be checked for budget funds availability. By configuring budget control, an organization can decide which source documents and accounting journals the budget check should be applied.   |
|   |      |                | Several new features are added to existing role centers as a part of the public sector industry solution. In addition, one new role center, for Finance Director, is introduced in Microsoft Dynamics AX 2012.   |
|   |      |                | General Ledger Role Centers. Three financial accounting role centers are redesigned as a part of the public sector industry solution. This includes the Accountant, Accounting Manager, and Controller role centers.   |
|   |      |                | Finance Director Role Center. The Finance Director role center resembles the Chief Financial Officer role center available in any Microsoft Dynamics AX 2012 installation, except that the Finance Director role center has an Actuals vs. Budget web part on the default role center while the Chief Financial Officer does not. In addition, the following web parts are available for use with the Finance Director role center: <ul style="list-style-type: none"> <li>o Current equity by dimension chart</li> <li>o Year-to year expenditure comparison by period chart</li> <li>o Finance Director KPI reports (Profitability analysis, Investment analysis, Long-term solvency, Short-term solvency, Operational efficiency, Finance Director ratios)</li> </ul>   |
|   |      |                | Accounts Receivable Role Center. The Accounts Receivable Administrator role center is redesigned to include four new web parts. <ul style="list-style-type: none"> <li>o Customers with unposted interest notes list report</li> <li>o Customers with unsettled amounts by billing classifications report</li> <li>o Receivables by billing classification and period chart</li> <li>o Customers with unposted collection letters list report</li> </ul>   |
| Hiring Workers and Terminating Workers    | 2012 | Human resource | A billing classification dimension is also available in the Public Sector Accounts Receivable cube.<br>The mass hire process is updated in Microsoft Dynamics AX 2012 to use shared workers and positions. A common action that must be performed in any organization is the termination of an existing worker. Termination consists of capturing the necessary data to terminate the worker from the organization on the correct date. In Microsoft Dynamics AX 2012, the termination process is improved to be more streamlined, and manageable.   |
| Department and Position Improvements      | 2012 | Human resource | Departments are introduced in Microsoft Dynamics AX 2012 to replace the organizational units from earlier versions of Microsoft Dynamics AX. Departments are one of the many entities that are a part of the new organization hierarchy uptake in Microsoft Dynamics AX 2012. Positions in Microsoft Dynamics AX 2012 now have a direct link to Departments. They are used to help create the reporting relationship hierarchy and to provide an improved flow for creating and maintaining data.  |



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| Injury and Illness                                | 2012 | Human resource   | <p>The new Injury and illness feature in Microsoft Dynamics AX 2012 has several distinct functions or uses. One use is to provide information to employers whose workers are being injured or made ill by hazards in their workplace. The information in the data helps make employers more aware of the kinds of injuries and illnesses occurring in the workplace and the hazards that cause or contribute to them. When employers analyze and review the information in their records, they can identify and correct hazardous workplace conditions on their own.</p> <p>The Global Address Book was added to Microsoft Dynamics AX 2009. By adding Applicant to the Global Address Book, in Microsoft Dynamics AX 2012, the directory subsystem including names, address and contact information is aligned with this structure. Therefore, redundant data is removed. Also included in Microsoft Dynamics AX 2012, are several architectural changes to the Applicant entity.</p>  |
| Application and Recruiting Improvements           | 2012 | Human resource   | <p>Changes to the Applicant process in Microsoft Dynamics AX 2012 allow for creating the Applicant directly from the Global Address Book (GAB), or from the Applicant list page or details form.</p> <p>List pages are where users can find data, analyze data, and then take action upon that data quickly. In Microsoft Dynamics AX 2012, improvements are made to the Recruitment projects list page. The primary goal of the improvements made is to enable users to surface and act upon information about a Recruitment project in a single view reducing the number of clicks or drill down’s needed.</p> <p>Microsoft Dynamics AX 2012 introduces many improvements to trade agreements including the following:</p> <ul style="list-style-type: none"> <li>Creation and maintenance of trade agreements is moved to journals for better control, usability, and transparency.</li> <li>Supports one view that includes all trade agreements for a selected set of items, customers, and vendors.</li> <li>Separate roles for creating or maintaining and approval.</li> <li>Allows for mass updates.</li> </ul>  |
| Trade Agreements functionality Improvements       | 2012 | Trade Agreements | <p>Several types of trade agreements have new functionality:</p> <ul style="list-style-type: none"> <li>Quantity changes. Microsoft Dynamics AX 2012 has introduced an additional quantity field on trade agreements. The addition of this field lets you define trade agreements for a specific quantity range.</li> <li>Generic currency. Generic currency allows for trade agreements to be set up for one currency. However, it can be used for all currencies.</li> <li>Smart rounding. The smart rounding concept which is a type of psychological pricing, can also be thought of as a “price ending” based on the marketing theory that prices have a psychological effect on people. Smart rounding can be applied after a bulk adjustment of trade agreements, or it can be applied automatically after a unit price is calculated, based on a generic currency and an exchange rate.</li> </ul> <p>With agreements, you can perform the following tasks:</p> <ul style="list-style-type: none"> <li>Support purchase and sales agreements which are based on quantities or amounts.</li> <li>Define a validity period for purchase and sales agreement. The delivery date of a purchase or sales should be within the validity period or the requested ship date on a sales order should be within the period.</li> <li>Put purchase and sales agreements on hold to control whether they are available to the agent during ordering.</li> <li>Control whether to search for purchase or agreements when purchase order lines are created indirectly, for example, by firming planned orders.</li> <li>Control whether to search for sales agreements when sales order lines are created indirectly, for example, by using intercompany orders</li> <li>Create a release order directly from the new Purchase agreement details form and new Sales agreement details form when the commitment is defined for a quantity of a product.</li> </ul> |
| Sales and Purchase Agreements                     | 2012 | Trade Agreements |   |
| Operations Resource Model                         | 2012 | Production       | <p>In Microsoft Dynamics AX 2012, resources can be allocated to jobs and operations by matching the capabilities of the resources with the requirements of the operation. Microsoft Dynamics AX 2012 has changed the following to the Operations Resource Model:</p> <ul style="list-style-type: none"> <li>Separated the way resources are grouped for managing capacity from the way resource requirements are specified for activities.</li> <li>Enabled resources to be used at multiple locations, just not at the same time.</li> <li>Eliminated the need for defining resources multiple times.</li> <li>Added the functionality to view available capacity by capability and simplifying manual scheduling and exception handling.</li> </ul>   |
| Costing Based on the Production Flow              | 2012 | Production       | The periodic consolidation of the cost for a production flow corrects the related WIP account and allows for determining variances for the products supplied by the production flow.  |
| Kanban Board                                      | 2012 | Production       | Lean Manufacturing is visual. Microsoft Dynamics AX 2012 brings this principle to a new level. The Kanban board uses the different approaches and features of lean manufacturing integrated into a single, configurable user interface for the shop floor.  |
| Finite Capacity Scheduling for Lean Manufacturing | 2012 | Production       | The main difference between production orders and production kanbans in Lean Manufacturing for Microsoft Dynamics AX 2012 is the implementation of finite capacity control for Lean Manufacturing. Whereas finite scheduling for production orders try to optimize capacity loading for single resources, with the risk of over-optimizing single resources and building increasing batch sizes, the lean capacity is based on work cell throughput assuming a concurrent use of various resources in a work cell. A lean work cell is represented by a Resource group that is flagged as the role of a lean work cell. This property makes all resources allocated to the work cell unavailable for finite scheduling of production orders or planned production orders for the time these resources are assigned to the work cell.  |
| Cost Accounting of Subcontracted Services         | 2012 | Production       | With the posting of the receipt advice or a vendor packing slip on a purchase order created for a production flow (generated based on kanban jobs for subcontracted activities), the value of the receipt is accounted in the WIP accounts of the production flow. Deviations of invoices are also accounted to the production flow. A new cost category for subcontracted work is introduced enabling a transparent tracking of the value of subcontracted work allocated to WIP and consumed per period.  |
| Manufacturing Execution                           | 2012 | Production       | Workers can register time and item consumption on production jobs by using the Job registration form. This feature lets you do the following: <ul style="list-style-type: none"> <li>Start/stop production order jobs</li> <li>Start/stop Project hour registration</li> <li>Report started, stopped, completed, time, good and bad quantities</li> <li>Registration approval</li> <li>Supervisor functionality (Job prioritization, Job history/Job feedback editing)</li> </ul>   |
| Build a Product Configuration Model               | 2012 | Production       | The primary goal in creating a new modeling framework for the Product Configurator is removing the need for a developer license to maintain product models. Microsoft Dynamics AX 2012 Product configurator enables the user to maintain their product models without the help of an X++ skilled developer. The Product Configurator is a flexible tool that is used to set up product models in the areas that require setup.  |
| Production Flow Improvements                      | 2012 | Production       | To better support continuous improvement, the production flows are implemented in time-effective versions. This enables copying an existing production flow version that includes all related kanban rules, to a future version of the same or new production flow, and models the future-state production flow before validating and activating it for production.   |

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| Products and Material in Work in Progress                  | 2012 | Production            | <p>The production flow architecture enables the transfer of material to the production flow with withdrawal kanbans in storage or transport handling unit sizes. The value of the issued material is added to the WIP account related to the production flow similar to material issued to a production order.</p> <p>The cycle time requirements can be defined in the production flow version details for each production flow version. Based on these settings, the average cycle time requirement is calculated for each activity of the production flow on validation, activation or recalculation of the version. The cycle time performance indicator displays the actual calculated cycle time for the defined cycle time period in relation to the boundaries defined in the production flow version.</p>   |
| Cycle Time Performance Indicator                           | 2012 | Production            |  |
| Event Kanbans  | 2012 | Production            | <p>The ultimate lean goal, the single piece flow with zero inventories, is not an illusion. Many industries can replace build to stock by assemble to order scenarios that support single piece flow. Lean Manufacturing for Microsoft AX 2012 provides a powerful new instrument to support these scenarios – Kanban production and replenishment based on Events. The Lean Manufacturing framework of Microsoft Dynamics AX 2012 enables definition of kanban rules with the replenishment strategy Event. Creating event kanbans based on this strategy is triggered by a source requirement and the new kanban is pegged to the source requirement. In AX2012 can be listed Sales, Kanban line, BOM line, Minimum Stock Events.</p>  |
| Kanban Board for Process Jobs                              | 2012 | Production            | <p>Introducing kanban as an entity in MRP allows for the following:</p> <ul style="list-style-type: none"> <li>○ The simplicity of the kanban organization. The physical flow of handling units triggers the flow of related information.</li> <li>○ The concreteness and simplicity of a physical kanban board representing a work cell schedule.</li> <li>○ The transparency of an integrated system that enables visibility of the situation of a specific cell, without going onto the shop floor.</li> <li>○ The accuracy of an electronic kanban schedule for the consumers of the supplied goods.</li> </ul> <p>The kanban board is a new user interface for lean manufacturing that combines all requirements for the multiple roles into a single, configurable, and scalable user interface.</p>   |
| Mixed Mode   | 2012 | Production            | <p>Microsoft Dynamics AX 2012 supports Mixed mode manufacturing. Mixed mode manufacturing enables companies to implement different production strategies on a single production site. The Mixed mode topic introduces how concurrent production strategies can be implemented to amount to the best possible result; maximum customer value.</p>   |
| Modeling Transfer as Subcontracted Activity                | 2012 | Production            | <p>Activity based subcontracting in Lean Manufacturing for Microsoft Dynamics AX 2012 introduces the ability of integration to carriers and transport vendors that move material and products between locations of a production flow. Modeling a transfer activity enables the assignment of a carrier or vendor. Microsoft Dynamics AX 2012 supports the quantity calculation for transport services, creating related purchase orders, an integrated receipt registration, and finally the cost integration of transport services into the production flow costing.</p>  |
| Product Configuration in Enterprise Portal                 | 2012 | Production            | <p>Microsoft Dynamics AX 2012 lets you access product configuration information for an order through the Microsoft AX Client and the Enterprise portal. Product configuration capabilities are integrated into the sales order, sales quotation, purchase order and production order. This enables configuration of a product while you enter an order, or modify existing configurations.</p>   |
| Reconciling Master Scheduling and Lean Manufacturing       | 2012 | Production            | <p>New in Microsoft Dynamics AX 2012 - Planned Kanban (Production kanban: BOM explosion creates Kanban line issues, Withdrawal kanban: Creates Kanban transfer issues). The replenishment strategy assigned to the kanban rule also determines the processes needed to create a new instance of a kanban for the rule. The replenishment strategies are:</p> <p>Fixed quantity. Fixed quantity kanbans are pre-created according to the needed kanban quantity. The handling units with the finished items are usually moved to a supermarket or picking area.</p> <p>Scheduled. The behavior of the Scheduled replenishment strategy in master scheduling resembles production orders. Kanbans are created by firming planned kanbans manually or by using a firming fence. The scheduled principle is used for items or variants produced in a lean work cell, but demand is created from forecast, customer or dependent demand, without being explicitly built to order.</p> <p>Event. For replenishment strategy Event type, kanbans are always directly created based on a specific demand.</p>  |
| Purchase Process for Subcontracted Activities and Services | 2012 | Production            | <p>In Microsoft Dynamics for AX 2012, the purchase process for subcontractedactivities is based on the scheduling and execution registration of the kanban jobs. The purchase process is an independent process and enables adjustment of the purchase documents manually in every step of the purchase process.</p>   |
| Semi-Finished Products                                     | 2012 | Production            | <p>Lean Manufacturing for Microsoft Dynamics AX 2012 integrates kanbans for inventoried products and semi-finished products in a single framework, offering a unified user experience for all cases.</p>   |
| Resource Scheduling Improvements                           | 2012 | Production            | <p>The scheduling engine is aligned with the new resource model. This introduces capabilities and priorities, and replaces work centers and work center groups by using resources and resource groups. The scheduling engine can now automatically search for a better solution, based on resource priority, and not only order duration.</p> <p>The core functionality in the Microsoft Dynamics AX 2012 Time and attendance module lets the user do the following:</p> <ul style="list-style-type: none"> <li>○ Recording when workers arrive and depart. The user interface of the Job registration form is significantly changed.</li> <li>○ Report on indirect activities.</li> <li>○ Calculate worker time. After each day, the worker's registration is calculated. By using workflow, you can determine who can approve registrations, and whether automatic approval of registrations is allowed. If an approval workflow is used, only deviations not accepted in the workflow have to be approved manually. The approval comes in two flavors - Individual registrations and the representation of all registrations made on a single work day as calculated in the Calculate form</li> <li>○ Approve worker time</li> <li>○ Track worker absences</li> </ul> |
| Time and Attendance  | 2012 | Production            |  |
| Transfer Jobs  | 2012 | Production            | <p>This fast tab supports the work of a user dedicated to a specific work cell. The user can control transfer in, transfer out, and picking processes in a single User Interface (UI), filtering all transactions related to the selected work cell.</p>   |
| Catch Weight   | 2012 | Process Manufacturing | <p>Catch weight is updated in several key areas to improve efficiency and to improve the business process flows. The ability to view and use catch weight products is added throughout the following areas:</p> <ul style="list-style-type: none"> <li>○ Product Information Management (Product details, Product templates). Catch weight products originate at the enterprise level in the same manner as all other new products. When the product is released to the company, the catch weight tolerance factor, units of measure, and other variables are defined and maintained for the product.</li> <li>○ Procurement and Sourcing (Purchase agreements, Delivery schedules)</li> <li>○ Sales and marketing (Sales agreements, Delivery schedules)</li> <li>○ Production control (Report as finished on a Production order)</li> </ul>  |

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| Product Information Management Improvements           | 2012 | Process Manufacturing | <p>The Product management module is updated in several key areas to improve efficiency and business process flows. Specifically, the following areas are improved:</p> <ul style="list-style-type: none"> <li>○ Enable catch weight to be globally defined</li> <li>○ Formula products use the global product concept</li> </ul> <p>Other Microsoft Dynamics AX 2012 features that are integrated with Process manufacturing include the following:</p> <ul style="list-style-type: none"> <li>○ Product and product variants</li> <li>○ Released products</li> </ul>   |
| Inventory and Warehouse Management Improvements       | 2012 | Process Manufacturing | <p>The Inventory and warehouse management module is updated in several key areas to improve efficiency and the business process flows. Specifically, the following areas are improved:</p> <ul style="list-style-type: none"> <li>○ Stocked inventory policy determined by stocked items attributes. A product definition no longer must be created for each product to be released to a company. You can now release multiple products. This includes product variants, to multiple companies.</li> <li>○ Ability to group and split planned orders</li> <li>○ Multiple batch attributes improvements. New User Interface (UI) makes it much easier to work with batch attributes.</li> <li>○ Multiple Shelf life improvements</li> <li>○ Commodity pricing now includes financial dimensions</li> <li>○ Integration with the Warehouse Management System II. Process manufacturing functionality is integrated with the WMSII.</li> </ul>   |
| Delivery Schedules                                    | 2012 | Process Manufacturing | <p>Process Manufacturing for Microsoft Dynamics AX 2012 integrates the following improvements to delivery schedules:</p> <ul style="list-style-type: none"> <li>○ Catch weight quantities.</li> <li>○ Same batch selection.</li> <li>○ Automatic reservation.</li> </ul> <p>The following improvements that support customer rebate functionality are available in Microsoft Dynamics AX 2012.</p> <ol style="list-style-type: none"> <li>1. Customized Period for Cumulating Rebates. The rebate feature in Process Manufacturing for Microsoft Dynamics AX 2012 now lets customers accumulate rebates periodically. Customers who select this option can configure this period to their specific business needs.</li> <li>2. New Methods to Create and Manage Rebates. Also new to Microsoft Dynamics AX 2012 is the ability to create and process rebates by different units of measure, currencies, product dimensions, and quantities.</li> <li>3. Improved Rebate Maintenance. The ability to maintain current rebate agreements is more flexible in Microsoft Dynamics AX 2012. Rebate agreements can now be maintained up to the point that transactions are initiated against the rebate. Users also have the added ability to process rebates from the Payment journal form. Negative numbers are no longer allowed in the Minimum quantity and Minimum amount rebate fields.</li> <li>4. Researching Customer Rebate Payments New research options are available for use in verifying the status of customer rebates. The options include the following: <ul style="list-style-type: none"> <li>○ Expanded search capability to let you search by transaction number.</li> <li>○ The addition of two new inquiry forms — Rebate details and Rebate paid by check. Use these inquiries to determine whether rebates are issued but not yet credited, or if checks have already been issued for customers who are paid by rebate check.</li> </ul> </li> </ol> |
| Customer Rebates                                      | 2012 | Process Manufacturing |   |
| Containerized Packaging                               | 2012 | Process Manufacturing | <p>Containerized packaging is improved in Process Manufacturing for Microsoft Dynamics AX 2012. This feature allows for batch orders for a packed product to be consolidated with similar packed products and one or many parent bulk product batch orders. Consolidated order forms are updated to reflect the new user interface changes. Other user interface improvements to containerized packaging include the following - Consolidate on-hand, Bulk product conversion, Consolidate orders list page, Consolidate order details, Firm consolidated orders</p>  |
| Co-Products and By-Products                           | 2012 | Process Manufacturing | <ol style="list-style-type: none"> <li>1. Improved Price Calculations. The Complete formula calculation form is updated to improve access to information for price calculations that include co-products.</li> <li>2. Viewing Co-products for Planned Orders. You can now view co-products for a formula item or a planning item from the Planned order details form and Planned order list page by using a new co/by product option.</li> <li>3. Total Cost Allocation Methodology. Total cost allocation (TCA) methodology is new for co-products in Microsoft Dynamics AX 2012. If the TCA check box is selected on the formula version, then the formula calculation is performed based on the new TCA methodology. If the TCA indicator is not selected, then the formula calculation uses existing functionality. TCA is not used for by-products in Process Manufacturing for Microsoft Dynamics AX 2012.</li> </ol>   |
| Master Planning Improvements for Multiple Co-products | 2012 | Process Manufacturing | <p>In Microsoft Dynamics AX 2012, when planning for the replenishment of a co-product and its planning formula (previously called planning item), all the co-products of that planning formula are planned out. Only the needed planned order replenishments remain before master planning continues to the next item.</p>  |
| Planned Orders  | 2012 | Process Manufacturing | <p>Group and split functionality, available in the Planned order details form, now validates that the correct route and formula versions are selected based on the quantity for the newly combined quantity or split quantity. Messages are issued to alert users when the resulting quantity is invalid for the current formula version, or when multiple planned orders for the same item are grouped and the group function selects only the formula and route versions of the last planned order.</p> <ul style="list-style-type: none"> <li>○ Batch cost estimates and costings: View information about batch orders. This includes the estimated and actual costs. The report shows total costs by cost group for each batch order and detailed costs for ingredients. You can use selection criteria to view only certain details, such as batch status.</li> <li>○ Catch weight on-hand inventory: Print the on-hand by quantity in catch weight units. You have the option to select different product dimensions.</li> <li>○ Catch weight physical inventory by item group: Print the physical inventory in catch weight units per item group for the date specified. A different SSRS report in Microsoft Dynamics AX 2012 contains similar information, but does not limit its results to catch weight items. The new report identifies the company name.</li> <li>○ Co-By variance: View co-product cost variances for an ended batch order.</li> <li>○ Shelf advice: Print the status of all batches for the specified shelf advice date.</li> </ul>  |
| New Process Manufacturing Reports                     | 2012 | Process Manufacturing |   |
| Purchase agreements                                   | 2012 | Process Manufacturing | <p>For process manufacturing, the new purchase agreements maintain quantity and pricing information and the following additional attributes - Catch weight products (all catch weight fields are required in the Purchase agreement form for any purchase order released from a purchase agreement. The release minimum and maximum amounts are rounded to accommodate any variances in the conversion calculation,possibility correctly track fulfillment, released and invoiced</p>   |
| Sales Agreements                                      | 2012 | Process Manufacturing | <p>For process manufacturing, the new sales agreements include the quantity and pricing information and other attributes appropriate for the product - Catch weight products ( a release order can be created for catch weight products , ability to correctly track fulfillment, released, and invoiced quantities for catch weight products in sales agreements), Same batch selection (when the Same batch field is selected, based on the configuration of the item, every attempt will be made to reserve the order from a single batch of inventory), Auto batch reservation (this functionality enables reservation of products, based on the batch attributes specified for the customer and on those inventory batches where the batch attribute values of the inventory meet the requirements of the customer), Excluding from rebates (a new field is added to sales agreements and sales orders that allows for excluding an item on the sales order line in any rebate calculation for the customer), Releasing sales orders.</p>  |
| Allocate Project Revenue                              | 2012 | Project management    | <p>Microsoft Dynamics AX 2012 introduces the ability to allocate and post revenue based on an internal sales price for each employee, category, and dimension. This enables companies to monitor the profitability for each allocation area.</p>  |

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| Project Budgeting                     | 2012 | Project management      | Microsoft Dynamics AX 2012 introduces new budget control functionality for projects. This feature focuses on providing a comprehensive, and user-friendly tool to manage a project's budget over the life of the project.  |
| Project Funding                       | 2012 | Project management      | Many organizations frequently run projects that are paid for from multiple pools of money. For public sector organizations, payment could be from multiple grants or from a mix of internal and external dollars. In the commercial sector split funding can be used in large construction projects or it might be used when doing projects for a large customer that wants to split funding of the project to multiple divisions or sub-organizations.  |
| Project Timesheets                    | 2012 | Project management      | <p>This includes the following:</p> <ul style="list-style-type: none"> <li>○ Users are now able to enter time for multiple projects.</li> <li>○ Timesheet support in Enterprise Portal includes the ability to manage favorites and to quickly create a new timesheet based on a previous timesheet or based on favorites.</li> <li>○ Improved readability of the timesheets by displaying both the ID and names concatenated for project, activity and category fields.</li> <li>○ The timesheet list page lets you preview the timesheet lines without having the need to open the timesheet.</li> <li>○ The timesheet line-level approvals now use support from the workflow framework for lines to achieve consistency with other tasks.</li> <li>○ The timesheet review experience is improved by not displaying timesheet lines with zero hours. The system now automatically deletes such lines upon submission.</li> </ul>   |
| Project Beginning Balances            | 2012 | Project management      | Microsoft Dynamics AX 2012 introduces a new feature that allows users to enter beginning balance transactions for a project. Project beginning balance transactions allow the user to input catch-up balances for the project without adversely impacting the general ledger (double entry, inflated balances, and so on).   |
| Manage Projects in Enterprise Portal  | 2012 | Project management      | <p>Project managers can now create and maintain projects in Enterprise Portal. In addition, users can create and update project quotations and convert approved quotations to active projects in Enterprise Portal. The primary goals for the improvements made to projects in the Enterprise Portal in Microsoft Dynamics AX 2012 include the following:</p> <ul style="list-style-type: none"> <li>○ Improve usability of existing features: Rendering core project accounting functionality in the Enterprise Portal provides project managers the flexibility of creating and managing projects remotely when they are in the field or away on travel.</li> <li>○ Reduce deployment complexity and manageability: Rendering core project accounting functionality in the Enterprise Portal enables project managers to access project and employee information without having to install or deal with upgrades or software updates.</li> <li>○ Extend analytical and visualization capabilities: A free-form entry grid with Gantt and resource views. This simplifies the task of creating and managing the project schedule. Surfacing key project information on profitability, invoicing, resource utilization, committed costs, and cash flow provides key project stakeholders insight into potential risks.</li> </ul>  |
| Case Management in Enterprise Portal  | 2012 | Project management      | Some users, both internal and external to the company, must access the Case management functionality. This requires access to cases through Enterprise Portal. The availability of Case management in Enterprise Portal will let infrequent users of the case management functionality access lists of current cases and create new cases. The Case management tool set version in Microsoft Dynamics AX 2012 provides the experts who are using the rich client a set of strong tools to handle cases.  |
| Product Dimension Locations           | 2012 | Supply Chain Management | The inventory dimension groups can be set up at an organizationally independent level or at the legal entity level. Dimension groups set up at the organizationally independent level can be overridden at a legal entity level.   |
| Configuration Technologies            | 2012 | Supply Chain Management | The product dimension group is completely dedicated to product masters. This lets users define configuration technologies. When you work with product masters it is important to define how the variations of a master are created. Frequently, many mandatory attributes must be specified to create a new variation.   |
| Products                              | 2012 | Supply Chain Management | To allow for a more centralized process, Microsoft Dynamics AX 2012 introduces the concept of products, or product definitions. Product definitions are created independently of a legal entity, and core values such as product number, type, and name are shared values. A product in Microsoft Dynamics AX 2012 consists of a core product definition. This is defined independently of the organization where it is used. As soon as the product is authorized for use in a company, the additional organizationally dependent details such as costing, coverage plans, taxation information, and preferred vendors for supplying the product and much more, is set up in the respective legal entities.   |
| Releasing Products                    | 2012 | Supply Chain Management | The release product process is designed to allow for users in an enterprise to push product definitions to various organizational units. By releasing a product or a product master you associate it with a company and authorize the product definition for use in the company.   |
| Product Translation                   | 2012 | Supply Chain Management | You can enter descriptions and product names for multiple languages. The product name and description are optional, and only the product number is required.   |
| Products Masters and Product Variants | 2012 | Supply Chain Management | A product variant is a product that has a size, color or configuration and is grouped by the product master. A product variant is a configured variant of product dimensions and it must be based on a product master. Only products and product masters can be released to companies directly. Product variants are always released through a product master.   |
| Intercompany Setup                    | 2012 | Supply Chain Management | <p>The following changes in Intercompany in Microsoft Dynamics AX 2012 affect the setup:</p> <ul style="list-style-type: none"> <li>○ Intercompany relations. Microsoft Dynamics AX 2012 does not use the endpoint setup. Instead it is configured by using an Intercompany trading relation and the connection is between a customer and vendor. This new setup allows for the relationships to be shared across companies. Relationships set up like this means that you only have to set up the intercompany relation in one company.</li> <li>○ Intercompany trade agreements. In Microsoft Dynamics 2012 sales and purchase order of type blanket orders are replaced with sales and purchase agreements. These agreements can also be used with an intercompany relationship.</li> <li>○ Intercompany products. In Microsoft Dynamics AX 2012 a shared products repository is introduced at the shared level and all items that are created at the company level are based on a product which is organizationally independent. The product serves as a common denominator for products per company.</li> </ul> <p>Companies are required to account for the value of goods in transit owned by the company. There are two reports in Microsoft Dynamics AX 2012 which show the values for Intercompany goods in transit:</p> <ul style="list-style-type: none"> <li>○ Intercompany goods in transit transaction</li> <li>○ Intercompany goods in transit totals</li> </ul> |
| Intercompany Reports                  | 2012 | Supply Chain Management |  |
| Intercompany Planning                 | 2012 | Supply Chain Management | <p>If organization has multiple legal entities, you must be able to run master scheduling across those entities. To enable this functionality, many improvements are made to intercompany planning in Microsoft Dynamics AX 2012. The main improvement connects demand and supply between companies not only for short term, firm demand and supply but also for long term, planned (that is not yet firmed) demand and supply.</p> <p>One challenge many businesses encounter is to control cost. They want to make sure that they are purchasing the correct supplies for the best price. To increase focus on cost control, change management is added to purchase orders in Microsoft Dynamics AX 2012.</p>  |
| Purchase Order and Change Management  | 2012 | Procurement             | Change management lets you review and track history of a purchase order before it is approved. This additional check on purchase orders to make sure that you are only purchasing what is needed, helps reduce costs. Change management uses workflow which allows for different processes, depending on the purchase order.   |
| Purchase Requisition Enhancements     | 2012 | Procurement             | The overall process for reviewing purchase requisitions is improved in Microsoft Dynamics AX 2012. When a purchase requisition is submitted for review, the individual purchase requisition lines can now be routed to the appropriate reviewers independently of one another. This lets reviewers take action only on purchase requests that are in their area of responsibility and to streamline processing time for purchase requisitions that have multiple line items.   |

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| Business Rules for Fixed Assets           | 2012    | Procurement                        | <p>The Business Rules for Fixed Asset Determination form provides a mechanism by which a company can define which products will be treated as Fixed Assets. These are based on monetary thresholds which are configurable globally across the enterprise. The configuration does not have to be done for each product individually; instead, it takes advantage of the category hierarchies. It uses the lowest level of the Procurement category hierarchy to set up the business rules defined in this specification. You can also set up capitalization thresholds per Legal entity, as some groups of products have different local versus global capitalization thresholds.</p>  |
| Purchase Requisition Consolidation        | 2012    | Procurement                        | <p>Requisition consolidation opportunities are introduced in Microsoft Dynamics AX 2012. This is a practical way to reduce procurement costs for organizations, to consolidate demand so that the total cost of a group of Purchase orders will be reduced, by offering a better price, lowered shipping and handling fees, and reduced overhead. The cost of goods and services frequently depends on several factors such as volume and timing. By consolidating demand, an organization can take advantage of these factors while negotiating with vendors. Purchasing professionals need an efficient way to analyze and manage many demand signals to increase buying power and achieve larger savings on the costs of goods and services.</p> <p>The following are the key benefits of requisition consolidation:</p> <ul style="list-style-type: none"> <li>o Help organizations to exploit economies of scale</li> <li>o Reduce transaction costs</li> <li>o Better leverage with vendors</li> <li>o Increase compliance with corporate spending policies</li> </ul>  |
| Purchasing Delivery Schedule              | 2012    | Procurement                        | <p>In Microsoft Dynamics AX 2012 delivery schedules are added to the purchase order, sales order, and sales quotation. These improvements let the user split an order line into multiple deliveries.</p>  |
| Purchasing Policies                       | 2012    | Procurement                        | <p>Purchasing Policies are introuced in Microsoft Dynamics AX 2012. A purchasing policy is a collection of purchasing policy rules that control the requisition process for a group of requisitioners. Purchasing policies help procurement administrators implement their procurement strategy by creating a policy structure that aligns with the company's strategic purchasing needs.</p> <p>The following features for vendor management are added to Microsoft Dynamics AX 2012:</p> <ul style="list-style-type: none"> <li>o Ability to associate vendors to products which they can supply.</li> <li>o Improvement of the current supplier diversity support.</li> <li>o Ability to store vendor certifications.</li> <li>o A vendor deactivation process for inactive vendors.</li> <li>o Ability to put a vendor on hold for requisitioning.</li> </ul>   |
| Catalog and Procurement Site              | 2012    | Procurement                        |   |
| Vendor Management                         | 2012    | Procurement                        | <p>The Vendor Self-Service Portal provides up-to-date information about the vendor and their products and services, current prices, and effortless transaction management ranging from printing invoices to responding to RFQs. By using a role tailored vendor self-service portal, vendors can manage all important business needs by delegating the appropriate responsibilities among the suitable personas as determined by the hosting organization. The vendor self-service portal provides vendors with the following abilities based on their user role and security (Create and change vendor information, Create vendor contacts, Request vendor user from list of contacts, Remove vendor contacts, Remove vendor users, Respond to RFQ, Upload catalogs, See notifications, Complete questionnaires, Request to be added as a vendor to a product category, View reports, View and add invoices, View payment status, line details and charges)</p> <p>Credit card dispute management provides a framework that will help enterprises automate their credit card transaction dispute process independent of the card provider for dispute management.</p> <ul style="list-style-type: none"> <li>o Ability to identify corporate credit card transactions for dispute and start the dispute process.</li> <li>o Ability to generate the dispute cover letter.</li> <li>o Workflow based dispute management process.</li> <li>o Automatic notification of deadlines throughout the dispute process.</li> <li>o Status tracking of disputed transactions.</li> <li>o Electronic documentation support.</li> <li>o Ability to record additional case details.</li> <li>o Ability to reconcile temporary credit to the dispute.</li> <li>o Audit trail.</li> </ul> |
| Credit Card Dispute Management            | 2012    | Travel and Expense                 |   |
| Travel and Expense Policies               | 2012    | Travel and Expense                 | <p>The key areas of focus are as follows:</p> <ul style="list-style-type: none"> <li>o Ability to define more policies than are available in earlier versions by adding more attributes on which policies can be defined such as Level II and III credit card data attributes</li> <li>o Removing attributes that do not make sense for defining policies</li> <li>o Adding the capability to create policies for Travel Requisitions. This is in addition to the expense policies that are currently available in Microsoft Dynamics AX 2009.</li> <li>o Moving the Policy violation functionality onto the new Policy Framework. This framework is useful for the following reasons:</li> </ul> <ul style="list-style-type: none"> <li>- Helps ensure a consistent user experience across applications</li> <li>- Provides support for the enterprise organization model</li> <li>- Provides date affectivity support</li> </ul>  |
| Budgetary Control                         | 2012    | Travel and Expense                 | <p>Generally, the success of a budget is limited to an organizations ability to monitor actual spending and the tools and policies that are enforced to control in the following lists:</p> <ul style="list-style-type: none"> <li>o Pre-Trip</li> <li>- Creation of pre-trip requisitions</li> <li>- Approval of pre-trip requisitions</li> <li>o Post-Trip</li> <li>- Submission of expense report that has all the expense transactions from the trip.</li> <li>- Approval of expense report.</li> <li>- Posting of expense reports.</li> </ul>  |
| Expense Reports Improvements              | 2012    | Travel and Expense                 | <p>This includes the expense entry, cash advance request, credit card dispute, travel requisition, and expense report delegation.</p>   |
| Style as a product dimension              | 2012 FP | Inventory and warehouse management | <p>This feature adds support for an additional product dimension, style. You set up and use the new dimension just as you set up and use the existing product dimensions, color and size.</p>   |
| Moving average inventory valuation method | 2012 FP | Inventory and warehouse management | <p>You can now select moving average, a perpetual cost method, as the inventory valuation method for products. The moving average valuation method allows for backdated purchase orders and sales orders, valuation of produced products, negative inventory, proportional capitalization of variances after the product invoice has been posted, and updated inventory cost for each transaction that is posted. The calculations for the inventory close and recalculation processes do not include products that are valued by moving average.</p>   |

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| Categorize retail products | 2012 FP | Retail | <p>Retail products can now be categorized through the category management feature in AX 2012. You can categorize products by using a category hierarchy that is <i>n</i> levels deep. Multiple category hierarchies are supported for special circumstances. You can more efficiently categorize your retail products. For example, you can create one main category hierarchy for all your retail products, and one or more supplemental category hierarchies for product promotions, vendor products, and so on. Attributes that are assigned at the category level can be applied to all products in the category. Values that are assigned to a parent category can be inherited by a child category.</p> <p>You can use the enhancements to products, category hierarchies, and organization hierarchies to more efficiently create and maintain assortments. A status and effective date were added. A new batch job was added for periodic updates of changes that are made to an assortment. These enhancements let you centrally manage all retail products across legal entities. You can perform the following tasks:</p> <ul style="list-style-type: none"><li>○ Efficiently group the stores and channels that assortments are assigned to by using the organization model.</li><li>○ Create multiple assortments by using category hierarchies.</li><li>○ Exclude selected products from an assortment.</li></ul>  |
| Product assortments        | 2012 FP | Retail | <p>A retail channel includes the retail brick-and-mortar store, online store, and online marketplace. Retail channels are a subtype of operating units. Use the organization hierarchy to model your store relationships and retail channels.</p> <p>Pricing for stores is accomplished by using price groups. Trade agreements are configured by using price groups. Microsoft Dynamics AX for Retail POS uses trade agreements and the price groups that are assigned to the trade agreements to determine the base price for a product.</p> <p>Price groups provide more flexibility when you set up product pricing. You can configure multiple price groups to meet the requirements of your various products and retail channels, and then assign one or more price groups to your stores.</p>   |
| Retail channels            | 2012 FP | Retail | <p>AX 2012 Feature Pack includes the following enhancements:</p> <ul style="list-style-type: none"><li>○ Concurrency rules let you apply multiple discounts, such as exclusive, best price, and compounded discounts.</li><li>○ You can define periodic discounts by category, product, or product variant.</li><li>○ You can use discount codes (coupons) for online promotions in campaigns.</li></ul>   |
| Price groups               | 2012 FP | Retail | <p>Two types of customer orders, quotations and sales orders, are supported in the following scenarios:</p> <ul style="list-style-type: none"><li>○ An order is created at a store and picked up at the same store.</li><li>○ An order is created at a store and picked up at a different store.</li><li>○ An order is created at a store and shipped to the customer.</li><li>○ An order is created online and picked up at a store.</li><li>○ Picking and packing workflows are started and completed in Retail POS.</li><li>○ Order returns or cancellations are processed in Retail POS.</li></ul>   |
| Periodic discounts         | 2012 FP | Retail | <p>The Add products form has been improved to support multiple product hierarchies and a new dialog box for selecting a variant matrix. You can also enter quantity and dimension values. Additionally, you can use a new “mass update worksheet” to make bulk updates to product properties.</p>  |
| Customer orders            | 2012 FP | Retail | <p>Retail staff in both the back office and the store are now integrated with the core Human resources module as workers. To simplify management of Retail POS permissions across the organization, jobs are associated with Retail POS permission groups. You can define a few standard jobs in your retail organization and have standard permissions for each job. All workers that you hire then automatically have the standard permissions. Additionally, you can associate workers with stores. Therefore, you can restrict a retail staff logon to a single store, a group of stores, or any store in the enterprise.</p>  |
| Inventory                  | 2012 FP | Retail |  |
| Staff management           | 2012 FP | Retail |  |
| Store inventory            | 2012 FP | Retail | <p>Retail store inventory has had major architectural changes to better suit native document support and to create a foundation for stronger retail store inventory functionality in the future. Retail store inventory (RSI) was originally a third-party handheld solution. The solution was then adapted into a module that was included in Microsoft Dynamics AX 2012 for Retail. RSI supported basic picking, receiving, and inventory counting, but was not optimized for Microsoft Dynamics AX. RSI required steps that made the solution less streamlined than other features of Retail. For AX 2012, RSI is no longer a stand-alone module. The solution is now more intuitive, efficient, and adaptable, and provides a stronger foundation for developing end-to-end store inventory management. Additionally, functional improvements that have been made in Enterprise Portal for Microsoft Dynamics AX and Retail POS make data entry more intuitive and faster.</p>   |
| End-of-day improvements    | 2012 FP | Retail | <p>To help with auditing for loss prevention, retailers rely on a several different processes. Two of these will be addressed in this release:</p> <ul style="list-style-type: none"><li>○ You can assign a specific till to a specific cashier, so that one person is responsible for the till. For example, if a cashier returns from a break and is now assigned to a different register, the cashier must physically move the till, and the cashier’s shift must follow him or her. This scenario is known as floating till.</li><li>○ You can remove the till from the cash drawer without closing the shift, so that the money can be counted in a back room instead of on the sales floor. This scenario is known as blind close.</li></ul> <p>In a blind close, multiple registers can be closed from one physical location. A single person can then count cash at the end of the day, and close all registers in a back room or another location that is away from the sales floor.</p> <p>In addition to these key processes, several other improvements are addressed in this release:</p> <ul style="list-style-type: none"><li>○ Important usability improvements have been made, such as an option to require starting and ending amounts before a shift can be closed. Additionally, there is an option to prompt for starting and ending amounts in Retail POS.</li><li>○ A ZZ-report has been added.</li></ul> |
| Global address book        | 2012 FP | Retail | <p>Addresses and contact information for retail entities have been migrated to addresses and contact information for parties.</p> <p>The global address book significantly changes the data structures and relationships of the underlying data for addresses and contact information. For example, when a customer is created in Retail POS, the customer and party are both created, as are the associated addresses and contact information (party locations).</p> <p>Microsoft Dynamics AX includes a sales cube that provides insight into sales performance:</p>   |
| Reporting and analytics    | 2012 FP | Retail | <p>Merchandizing analytics</p> <ul style="list-style-type: none"><li>○ Sales performance by retail category</li><li>○ Sales performance by product</li></ul> <p>Retail channel analytics</p> <ul style="list-style-type: none"><li>○ Sales performance by retail channel</li></ul> <p>Store analytics</p> <ul style="list-style-type: none"><li>○ Store sales by worker</li><li>○ Store sales by hour</li><li>○ Store sales performance report</li></ul> <p>Operating unit analytics</p> <ul style="list-style-type: none"><li>○ Operating unit sales performance</li></ul>  |



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| Sites Services for Microsoft Dynamics ERP  | 2012 FP | Retail                            | <p>Microsoft Dynamics AX includes five Sites Services solutions that can streamline and speed business processes:</p> <ul style="list-style-type: none"> <li>○ Advertise promotions</li> <li>○ Online case request</li> <li>○ Human resources recruitment</li> <li>○ Request for quotation</li> <li>○ Unsolicited vendor registration</li> </ul>  |
| Store database   | 2012 FP | Retail                            | <p>An offline feature has been added to the store database to support a central database in the retail store. An offline database can also be used locally to reduce downtime if a network failure occurs, and in scenarios where a register must be used offsite or in a sidewalk sale.</p> <p>Enhancements have been made to Commerce Services:</p> <ul style="list-style-type: none"> <li>○ Retail channels</li> <li>○ Assortments</li> <li>○ Categories</li> <li>○ Buy online and pick up in store</li> <li>○ Sales tax on shipping</li> <li>○ Retail security roles</li> </ul>   |
| Commerce Services for Microsoft Dynamics ERP   | 2012 FP | Retail                            |   |
| Sales tax on shipping  | 2012 FP | Retail                            | The sales tax feature extends existing functionality to support sales tax on shipping charges.  |
| Retail Store Connect   | 2012 FP | Retail                            | <p>The operation and configuration of scheduler jobs have been separated. Therefore, it is easier to configure different batch schedules or multiple instances of Retail Store Connect for scalability. The scheduler configuration is now global and can be used for multiple legal entities. Performance has also been improved.</p> <p>Role-based security has been added, and built-in roles that cover all functional aspects of the product have also been added. These built-in roles include the following roles:</p> <ul style="list-style-type: none"> <li>○ Retail Merchandising Manager</li> <li>○ Retail Operations Manager</li> <li>○ Store Manager</li> <li>○ Store Inventory Clerk</li> </ul>   |
| Role-based security  | 2012 FP | Retail                            |   |
| Intercompany timesheets  | 2012 FP | Project management and accounting | <p>By enabling the Intercompany timesheets feature in Project management and accounting parameters, you add the following functionality:</p> <ul style="list-style-type: none"> <li>○ Loaned workers can submit timesheet hours for project work that they perform for the legal entity that borrows them.</li> <li>○ Project managers can review and approve timesheet submissions from borrowed workers. The loaning legal entity can track the amounts that are due from the borrowing legal entity.</li> </ul>  |
| Adjust taxes on an invoice line  | 2012 R2 | Accounts payable                  | <p>You can adjust the taxes that are calculated on an invoice line before you post the invoice.</p> <p>New functionality for a payment calendar in the Accounts receivable and Accounts payable areas replaces similar functionality that was previously available only for certain countries/regions. When the payment calendar is used together with rules for due dates, companies can specify non-business days for countries and regions, and additional holidays at the state and province levels. Companies can also specify non-business days for any other purpose, such as non-banking days. This functionality helps guarantee that due dates for payments on vendor and customer invoices are not set for non-business days. When a payment is due on a non-business day, the new due date control moves the date to the nearest business day either before or after the default date, based on options that you select.</p>                                    |
| Integrate a payment calendar to control due dates for payments                                   | 2012 R2 | Accounts payable                  | <p>You can also use the due date control together with the payment calendar to make sure that calculations of grace periods for interest and fees for payments start on the nearest business day. This functionality can be used, for example, to enhance the due date and payment date control in Accounts payable. You can then avoid any unplanned interest or fees for late vendor payments. Additionally, payment processing is easier, because due dates are always on a processing day.</p>  |
| Generate positive pay files to help banks prevent check fraud                                    | 2012 R2 | Accounts payable                  | <p>Set up positive pay to generate an electronic list of checks every time that checks are printed. When a check is presented to the bank, the bank compares the check with the list of checks that was previously submitted. If the check matches a check in the list, the bank clears the check. If the check does not match a check in the list, the bank holds the check for review. Positive pay is also known as SafePay.</p>   |
| Prepay 100 percent of a purchase order amount  | 2012 R2 | Accounts payable                  | <p>In AX 2012, you can create prepayments for the line amounts on a purchase order. However, charges and taxes are not included in prepayments.</p> <p>In cumulative update 6 for Microsoft Dynamics AX 2012 R2, you can prepay either 100 percent or a fixed amount that is equal to the purchase order total. The prepayment can include taxes and charges that have a type of Customer/Vendor. For example, if the amount of a purchase order line is 1,000.00, and the sales tax amount is 125.00, the default entry for the prepayment is 1,125.00. In AX 2012, the default prepayment amount was 1,000.00.</p> <p>The following options for vendor invoice workflows are added:</p> <ul style="list-style-type: none"> <li>○ You can create conditions that are based on values in purchase order fields.</li> <li>○ The Vendor invoice lines.Procurement category property now includes hierarchical operators for contains, begins with, is, and is not.</li> </ul> |
| New options for configuring workflows for vendor invoices  | 2012 R2 | Accounts payable                  |   |
| Record charges on free text invoice lines  | 2012 R2 | Accounts receivable               | This feature lets you add freight and other charges to each line in a free text invoice, and distribute charges to dimensions and ledger lines.   |
| Create and approve budget plans  | 2012 R2 | Budgeting                         | <p>You can use budget planning in AX 2012 R2 to establish a base budget, prepare and evaluate budget plans, and approve or revise budget plans. You can also generate an approved budget that can be used together with budget control. Budget planning is configurable, and supports a flexible chart of accounts and dimensions, custom-defined process configurations, and workflows. Additionally, budget planning lets you use Microsoft Excel to estimate costs to create scenarios, and provides standard reports and an analysis cube.</p>  |
| Budget plan scenarios report   | 2012 R2 | Budgeting                         | This report displays details about ledger accounts for up to five budget planning scenarios. The information is grouped and subtotaled by one, two, or three summary options.   |
| The budget allocation process is easier, because you can use ledger allocation rules for budgets | 2012 R2 | Budgeting                         | The budget allocation process is easier, because you can use ledger allocation rules for budgets. When you run allocation for budget plan lines from the Budget plan form, you can select to use ledger allocation rules. You can also use ledger allocation rules when you use an allocation schedule. Additionally, you can now allocate budget amounts by using the basis method.  |
| Budget planning workflows can be set up so that they can't be accidentally deleted or reset      | 2012 R2 | Budgeting                         | The Do not allow budget plans to be deleted and Do not allow budget plans to be reset options are added to the Budget planning workflows area in the Budget planning configuration form.  |
| Budget planning workflows can be set up so that they require a parent budget plan                | 2012 R2 | Budgeting                         | The Require parent budget plan option is added to the Budget planning workflows area in the Budget planning configuration form.   |
| Transfer multiple fixed assets   | 2012 R2 | Fixed assets                      | You can now transfer more than one fixed asset at the same time. For fewer than 100 assets, you can complete the transfer from the Fixed assets list page. For more than 100 assets, use the Mass transfer form that is available in the Periodic section of the Fixed assets area page.  |

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| The acquisition cost of fixed assets can include a miscellaneous charge amount                                     | 2012 R2 | Fixed assets    | In earlier releases of Microsoft Dynamics AX, when a fixed asset was acquired, and the acquisition cost included miscellaneous charges, the acquisition amount of the fixed asset was adjusted to exclude the miscellaneous charges. Now, when a fixed asset is acquired through a vendor invoice, any item type miscellaneous charge amounts are included in the acquisition cost of the fixed asset.  |
| The process for acquisition proposals or depreciation proposals for fixed assets can now be run in a batch process | 2012 R2 | Fixed assets    | In earlier releases of AX 2012, the processes for depreciation and acquisition proposals could be very time-consuming. Now, you can create depreciation or acquisition proposals as a periodic process. After the process is run, journals are created, so that users can review the transactions before they post. For longer running proposals, such as depreciation proposals, you can select to create the proposals using a batch process.   |
| Interunit accounting   | 2012 R2 | General ledger  | Interunit accounting can be used to identify a financial dimension as balancing, so that a balanced balance sheet can be generated for the selected financial dimension. After a balancing financial dimension is defined on the ledger, every accounting entry is validated to make sure that it is also balanced at the financial dimension level. If any financial dimension values are unbalanced, interunit due-to and interunit due-from account entries are generated to balance the accounting entry.   |
| Legal entities can have more than one consolidation account  | 2012 R2 | General ledger  | Some local governments might mandate a specific chart of accounts, which is also known as a statutory chart of accounts. Main accounts can be shared between legal entities, and you can map the same main account to multiple consolidation accounts to create a statutory chart of accounts, which can also be shared between legal entities. The additional consolidation accounts are grouped in a consolidation account group, which you can select during the consolidation process.  |
| Tax registration numbers can be defined at the party address record level  | 2012 R2 | General ledger  | You can create tax registration number types and set up tax registration numbers for customers, vendors, and legal entities at the address level.   |
| Fixed values for financial dimensions  | 2012 R2 | General ledger  | For each main account in a specific chart of accounts, you can designate a default financial dimension value as a fixed value for each company that uses the chart of accounts. If the default financial dimension value differs, or if the user manually changes the default financial dimension value for the main account to a fixed dimension value, the financial dimension is changed to the fixed value during posting.  |
| New framework for importing exchange rates   | 2012 R2 | General ledger  | Existing exchange rate import features that were available for various countries/regions, which include Russia and Eastern Europe, have been consolidated, and a framework for exchange rate import features is available.<br>New providers can be added in C# or X++ and used by the framework. You can define a provider for importing currency exchange rates and periodically import those exchange rates between pairs of currencies.  |
| Shared lists of main accounts  | 2012 R2 | General ledger  | In AX 2012 R2, the same chart of accounts can be shared across legal entities. The list of main accounts in the chart of accounts can contain various account structures, and more than one account structure can be assigned to each legal entity's ledger.  |
| Updates to General ledger reports  | 2012 R2 | General ledger  | Reports that display amounts in the accounting currency, transaction currency, and reporting currency have been updated to display those amounts in both debit and credit columns, instead of just one column.  |
| Configure a recurring schedule batch job to clear purchase accrual for product receipt source documents            | 2012 R2 | General ledger  | You can configure when and where to run the process for clearing purchase accrual. A recurring schedule batch job to clear purchase accrual for product receipt source documents is installed for each legal entity. You can configure the batch job to specify how many sub-batch tasks the batch job can use to process a subset of product receipt source documents that have an accounting event type of Finalized and an accounting event status of Started.   |
| General ledger balances are updated when a process requires balances   | 2012 R2 | General ledger  | General ledger balances are no longer updated during the posting process. Instead, general ledger balances are updated whenever a process requires balances. For example, the general ledger balances are updated when you view the Trial balance list page. If you are using cubes that rely on updated general ledger balances, you must click the Update balances button in the Financial dimension sets form before you process cube data. To improve performance during balance calculations, you can schedule a batch to update balances more frequently, such as every two hours. When balances have to be calculated, only two hours' worth of data has to be calculated. |
| Financial reporting options  | 2012 R2 | General ledger  | A configuration key controls access to the traditional financial statement functionality and forms that are included with Microsoft Dynamics AX. The configuration key is not selected automatically in new installations of Microsoft Dynamics AX so that new users can use Management Reporter.   |
| Delete an unposted journal that contains lines   | 2012 R2 | General ledger  | In earlier releases, you had to delete the lines first, and then you could delete an unposted journal. Now, if you delete the journal, the lines are automatically deleted.   |
| View advanced rules for a main account   | 2012 R2 | General ledger  | You can view the advanced rules that a main account is associated with. For more information, see Main accounts - chart of accounts (form).   |
| Display dimensions in a specified order in Management Reporter   | 2012 R2 | General ledger  | You can select the order in which financial dimensions are displayed in Management Reporter. Use the Financial dimensions used as document data sources form to specify the order.  |
| Default dimension values follow a consistent pattern in accounting distributions                                   | 2012 R2 | General ledger  | Default dimension values follow a consistent pattern. For example, the default dimension values for tax for a charge use values from the distributions in the following hierarchy:<br>Parent distribution (charge) > Grandparent distribution (extended price) > Default dimensions on the document line > Main account   |
| Create a budget for filled or vacant positions   | 2012 R2 | Human resources | You can identify salary and benefits for each position. You can also create budget amounts by budget cycle, account, and dimension, and import your forecast data into the budget planning tool. You can complete these changes in a temporary environment, without affecting your live data. Alternatively, you can make the changes directly to your live data. In this case, the changes become effective immediately.   |
| Worker education enhancements  | 2012 R2 | Human resources | You can enter additional details about worker education in the Education form. For a completed degree, you can enter the credits that were completed and the credit basis, such as semester or quarter. For a degree that is in progress, you can enter the credits that have been earned and the credits that are required. You can also enter any additional notes that are related to the worker's education, and also enter a secondary emphasis, or minor, such as Business or Economics. This information can be viewed and entered on the Employee services site, and can appear on the Worker and Applicant resume reports.   |
| Copy existing positions, mass update positions, and block position assignments                                     | 2012 R2 | Human resources | You can create individual or multiple positions by copying an existing position. You can also update multiple positions at the same time. Additionally, you can prevent positions from being assigned to workers, without having to delete the positions.   |
| Staffing manager Role Center   | 2012 R2 | Human resources | This Role Center has been enhanced to provide the most relevant information to the Staffing manager. This information includes the average days to recruit by department, job application sources, and the applications that each open recruiting project has received.   |
| HR manager Role Center   | 2012 R2 | Human resources | This Role Center has been enhanced to provide the most relevant information to the Human Resources manager. This information includes position hierarchy information, active workers by department, and injury and illness incidents by month and year.   |
| HR training and development manager Role Center  | 2012 R2 | Human resources | This Role Center has been enhanced to provide the most relevant information to the Training and development manager. This information includes open courses and the number of workers who have taken a particular course.   |
| Enhancements to the benefit setup and the Benefits list page   | 2012 R2 | Human resources | You can create new benefits and maintain benefit versions on the Benefits list page instead of in the Plan Setup form.  |
| Changes to the forecast positions area   | 2012 R2 | Human resources | This feature replaces and expands the existing forecast position functionality. The updates include detailed compensation estimates for new positions, “what-if?” scenarios, and integration with Microsoft Dynamics AX and third-party payroll systems.  |

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| Handling for garnishments (such as child support orders) and tax levies  | 2012 R2 | Payroll                            | Set up garnishments and tax levies by using the same forms and controls that you use to set up benefits. Specify percentage-based limits and other data that is required to make sure that a garnishment or levy does not reduce a worker's net pay below the minimum that is set by federal, state, or local governments. Specify the amount or percentage of wages to deduct, and the lifetime limit for the garnishment, if applicable. You can also specify the order in which deductions are calculated and the maximum percentage of the base wages that can be deducted.  |
| Position settings for payroll  | 2012 R2 | Payroll                            | Specify the legal entity that the position is paid from, and set the typical hours that are worked per year and per pay cycle for the position. You can also select whether to generate pay based on salary or a schedule. Assign default values to positions, so that you can control the standard worker settings.   |
| Payroll taxes  | 2012 R2 | Payroll                            | Specify the legal entity that the position is paid from, and set the typical hours that are worked per year and per pay cycle for the position. You can also select whether to generate pay based on salary or a schedule. Automatically assign default values to workers' positions, so that you can control the standard worker settings.  |
| Track pay statements that are generated as part of a group in a single payroll run   | 2012 R2 | Payroll                            | Batch numbers are automatically assigned when you generate pay statements.   |
| Create and update payroll tax groups   | 2012 R2 | Payroll                            | You can now create and update groups of payroll taxes. Each tax group contains a set of payroll tax codes. You can update all the tax codes in a tax group at the same time. For example, you can change the vendor and main account for every tax code in a tax group at the same time.<br>Tax groups can also be used in transaction posting definitions. Each tax code can be included in multiple tax groups, but a tax code can be in only one tax group that is enabled for posting definitions.   |
| Earning codes  | 2012 R2 | Payroll                            | User can now specify accounting templates and dimension values for earning codes and integrate Payroll with fixed compensation plans in Human resources.   |
| Release earnings for payment processing  | 2012 R2 | Payroll                            | Releasing earnings is a stand-alone procedure that designates the earnings as ready to be processed in a worker payment.   |
| Improvements to Public sector Role Centers and business intelligence content   | 2012 R2 | Public sector                      | The following Public sector Role Centers were updated: Accounts Receivable Administrator, Finance Director, Accounting Manager, and Accountant. You can now categorize Role Centers by the type of role: Strategic, Tactical, or Operational. The key performance indicators (KPIs) and organization performance indicators on Role Centers can now be easily modified, and can report variances and percentage of goal measurements. Chart rendering was improved, and an organization performance indicator to track the spendable balance by fund was added.  |
| Budget analysis inquiry  | 2012 R2 | Public sector                      | In Microsoft Dynamics AX 2012 R2, public sector customers can display revenues and expenditures by financial dimension, by using a combination of data from budget register entries, the general ledger, and budget control. Revised budgets, actual expenditures, encumbrances, pre-encumbrances, and a discrete breakout of carry-forward amounts are available. Detail transactions can be displayed for a selected financial dimension for each budgeted amount, such as the original budget or revisions.   |
| Dispose of fixed assets  | 2012 R2 | Public sector                      | You can now dispose of more than one fixed asset at the same time. This feature saves time and reduces the risk of errors.<br>The performance of the Inventory close and Recalculation batch jobs has been significantly improved. The improvement is based on the following changes in the way that the batch jobs use the batch framework in Microsoft Dynamics AX:  |
| Performance enhancements for Inventory close   | 2012 R2 | Inventory and warehouse management | <ul style="list-style-type: none"> <li>○ The logic that is associated with batch helpers for inventory closing has been redefined, and the new logic uses parallel processing from the batch framework much more efficiently than the original logic.</li> <li>○ A new parameter has been introduced that lets you specify the maximum number of items that can be processed at the same time by an inventory closing batch helper.</li> </ul> Because of the change, the process flow is more efficient, and performance is enhanced. Additionally, insight and traceability of the current stage of the Inventory close and Recalculation jobs are improved when these jobs are run in a batch.  |
| Trace items and raw materials in inventory, production, and sales transactions   | 2012 R2 | Inventory and warehouse management | You can use the item tracing features to gain visibility into the source and destination of items throughout the supply chain. Manufacturers can trace raw materials and ingredients from receipt, to production, to the sale and transportation of the finished product. Item tracing can help manufacturers comply with regulatory requirements, and helps quality officers and production managers analyze and take action to address variances in the quality of materials.  |
| Performance improvements for on-hand inventory transactions  | 2012 R2 | Inventory and warehouse management | The On-hand entries cleanup batch job lets you delete unused entries for serialized on-hand inventory. The batch job deletes on-hand inventory entries that are assigned to a tracking dimension, that contain the value 0 (zero) for all quantities and costs, and that are marked as closed. You can also specify the length of time, in days, that the entries must be unchanged before they are deleted. Entries that are not assigned to a tracking dimension are not deleted. This feature can help improve the performance of queries for on-hand inventory.  |
| Batch merge to combine batches in inventory  | 2012 R2 | Inventory and warehouse management | Batch handling features make it easy to combine two or more inventory batches into a new or existing batch. The batch merge functionality can also help you manage the shelf life and vendor batch details for merged batches.<br>When the source batches are selected, and the details for the merged batch are specified, you can review the information before you post it. You can also transfer the batch merge to an inventory journal for approval. Inventory can then be reserved or posted directly from the inventory journal. When you post a batch merge, the system creates or updates the selected destination batch, and adjusts the inventory for the source batches and the merged batch.   |
| Role Center for costing and inventory valuation  | 2012 R2 | Inventory and warehouse management | The cost controller's Role Center provides information about costing and inventory valuation. The Role Center includes two cues that can help cost controllers with the daily maintenance of system configurations.  |
| The Configuration form in Product configurator is easier to extend   | 2012 R2 | Product information management     | You can request the status of inventory, inventory accuracy per item group, and inventory aging in a series of diagrams. Furthermore, a business overview can help you identify products that have low performance.<br>To improve the extendibility of the Configure line form that is used during a configuration session in Product configurator, a new form that is based on X++ is now available as the default configuration form.  |
| Improvements to planning tools   | 2012 R2 | Product information management     | Businesses can now select whether they want to use a configuration form that is based on the Windows Presentation Foundation, or one that is based on X++.<br>You can now view the relationships between actions on planned orders. You can also view relationships to orders that are already approved. This makes it easier to prioritize orders, and to focus on auto firming derived requirements.   |
| Improvements made to the overview of production information, approval and calculation of worker registration on projection jobs, and worker absences | 2012 R2 | Product information management     | Features are introduced for setting parameters for planning to make it easier to understand how parameter settings can affect data in Microsoft Dynamics AX. When you run explosion, you can now turn on a log to record how master planning requirements are generated for a specific order. This makes it easier to identify why an order was generated in a certain way. You can run master planning again in a simulation plan, so that neither the dynamic plan nor the static plan is affected.<br>Fields and controls have been added to the Edit job list form to provide shop floor supervisors with a better overview of the production information involved in production orders. The additions include an improved ability to prioritize jobs, change the resource that is assigned to a selected job, add attachments, and view information about the materials and route directly from the Edit job list form.<br>Improvements have also been made to the features for approving and calculating worker registrations on production jobs and absence. A new Week view has been added to enable an approver to view and manage registrations for an individual worker for a full work week. |

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| Enhanced modeling capabilities in Product configurator   | 2012 R2 | Product information management    | <p>You can set up a product configuration model so that the system will automatically reuse a configuration when a user makes selections that match the criteria for its reuse. Setting the criteria that determine whether the system will reuse a configuration starts with specifying that the component is reusable, and then selecting the attributes that a user's selections must match during a configuration session. When a user completes a configuration session, the system searches for a matching configuration. If the system locates a configuration that meets these criteria, it reuses the configuration ID and the associated BOM and route.</p> <p>You can now specify that an attribute is read-only when a user is configuring a product. This new attribute modifier has been placed together with the hide and mandatory modifiers on the Attributes FastTab.</p> <p>When mapping the fields in a table constraint to the attributes of a component, in addition to using attributes on the component itself, a user can now also use attributes from subcomponents of the component.</p> <p>Default attribute values are now considered to be of the same class as attribute values selected by a configuration user. Thus, having one or more default values in contradiction with each other or with a constraint will give an error when a configuration is tested or executed. The consequence of this is that it might be necessary to revise the default attribute values for product configuration models.</p> <p>The expression editor has been updated to comply with the industry standard that a product designer expects for building expressions in Microsoft Dynamics AX. The main enhancements include the following features:</p> <ul style="list-style-type: none"> <li>○ The user interface has been updated to enable you to easily build expressions using operators, attributes, and attribute values.</li> <li>○ A feedback mechanism has been created to enable you to easily identify errors when you validate the expressions that you write.</li> </ul> <p>When you work with product configuration models, you can now use calculations to test the impact of different decimal numbers when you configure a product. Calculations are new concepts that complement constraints, and they include a larger set of operators than the operators that are available for constraints. A calculation consists of a target attribute and a calculation expression. The target attribute receives the result of the calculation.</p> <p>You can now define individual prices for product options using a configuration model. Each component in a product configuration model has a base price. You can use expression rules to associate attributes with a value that affects the total price. When you configure a product and select a product option for the component, you can see how the option contributes to the total price of the product configuration model.</p> <p>AX 2012 R2 has two databases. The business database contains transaction data and master data. The model database contains application objects, which are managed as model files. The model database replaces the application file store (AOD) that previous versions had. You can name the business database. The model database has the same name as the business database, but _model is appended. Both databases must be stored on the same instance of Microsoft SQL Server.</p> <p>AX 2012 R2 enables data isolation by using data partitions.</p> |
| Expression editor enhancements   | 2012 R2 | Product information management    |   |
| Calculations in product configuration models   | 2012 R2 | Product information management    |   |
| Determine prices using a product configuration model   | 2012 R2 | Product information management    |   |
| Database split   | 2012 R2 | General                           |   |
| Data partitioning  | 2012 R2 | General                           |   |
| Case management functionality is enhanced for documenting and releasing product changes to production      | 2012 R2 | Production control                | <p>The Case management functionality now provides tools for documenting changes to a product. For example, you can track component substitutions in the bill of materials of formulas, or changes in the production route. Approvals and validations can be automated, so that you can manage the release of bills of materials, routes, and formulas to production processes.</p>  |
|  |         |                                   | <p>You can modify the activity relations in the production flow versions by using the Edit activity relation form. In earlier versions of Microsoft Dynamics AX, you entered start and end constraint times for an activity relation when you created it. Afterward, you could not change the constraint times. The same restriction applied for the cycle time ratios of the activity relation, which adjust the calculation of cycle times for the activities of a production flow based on the required takt time of the production flow version.</p> <p>The material date calculation is based on the actual job schedule. When a job is sequenced in the schedule, the material date and time are recalculated based on the expected receipt date and time of the job. In Microsoft Dynamics AX 2012, the material date and time was always set to the start of the period, which caused dependent jobs to exceed their due date.</p> <p>In previous releases, when capable to promise (CTP) explosion fired a withdrawal kanban for a scheduled rule, the pegging to the required material was incorrect and the dynamic plan was inaccurate. This problem is fixed.</p> <p>You can now combine event kanbans together with CTP. The ability to move firmed orders based on CTP is limited to event kanbans, and occurs only when sales order lines are created. Further application of moving orders requires additional supply policies to ensure that planning is accurate.</p> <p>To support forward scheduling of kanban jobs based on futures dates, you can move planned kanban jobs to later periods. This capability is also useful in the kanban scheduling board, where the new Schedule from date function has been added. When you schedule jobs for a futures date, the jobs are added at the end of the planning period, and planned according to the capacity that is available on the date. As opposed to automatic planning, the schedule from date function enables you to schedule jobs past the planning fence that is defined in the production flow model.</p>   |
| Lean manufacturing   | 2012 R2 | Production control                |   |
| Create sequences for production  | 2012 R2 | Production control                | <p>You can use product sequencing to define one or more sequences to assign to a various item. Product sequencing provides a method to sort production into a required order so that the changeover times are automatically reduced in production.</p>  |
| Configure an item to inherit shelf life and batch attributes from intermediate items of the finished goods | 2012 R2 | Production control                | <p>You can configure an item to update its batch attributes and shelf life information from the ingredients of the formula that is used to produce the item. You can use shelf life inheritance to define items so that the inventory batch with the earliest shelf life dates is updated or inherited by the product characteristics of the finished items. For batch attributes, you can define attributes for both the finished items and their ingredients, and select which ingredients pass along their characteristics or attribute values to the finished items. You can also select to have co-products updated with this same shelf life and batch attributes.</p>  |
| Define a formula, and perform batch balancing of a potency item used in production                         | 2012 R2 | Production control                | <p>You can use potency management to define an item as having a specific concentration of an active ingredient, adjust the quantity of material that is required in the production of the item, calculate the amount of money that is paid to a vendor for the item, and select an ingredient type for a formula line.</p>  |
| Designate a project cost price as an effective labor rate  | 2012 R2 | Project management and accounting | <p>AX 2012 R2 introduces support for specifying a worker's hourly cost price on projects as an effective labor rate. The effective labor rate defines the hourly cost if the worker works all the hours in a work week. The cost price of the effective labor rate for a period is calculated by using the following formula:</p> $\text{Effective labor rate price per hour} * (\text{Number of hours in the work week according to the worker's calendar} / \text{Number of hours registered in the week})$ <p>The Project setup form now includes a Use effective labor rate check box. If this check box is selected, you can mark a worker's hourly price in the Cost price - hour form as an effective labor rate.</p>  |
| Select a value model for estimate eliminations   | 2012 R2 | Project management and accounting | <p>For investment projects, in the Estimate form, you can now select the value model that is applied when the value from an estimate project is eliminated to a fixed asset.</p>  |
| Improved support for project estimates and revenue recognition   | 2012 R2 | Project management and accounting | <p>In earlier versions of Microsoft Dynamics AX, a project manager who wanted an estimate project to be created to support a Fixed-price project or an Investment project had to remember to select the New estimate project check box in the Create project form. Otherwise, use of the estimate system to recognize revenue was not fully supported.</p> <p>In AX 2012 R2, an estimate project is created automatically when the project manager creates a Fixed-price project or Investment project. As part of this change, cost templates and period codes no longer have to be assigned to each project individually, but can be assigned to project groups instead. This change supports the more common practice of using the same cost template and estimate period for most or all Fixed-price projects and Investment projects. This change also reflects the fact that other accrual and revenue recognition options are set up in project groups.</p>  |

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| Consumption of project items on product receipt, even if there is no item requirement  | 2012 R2 | Project management and accounting | In AX 2012, if an item was added to the purchase order for a project but was not preceded by an item requirement, the item could not be consumed and invoiced to the project contract's funding source until the related vendor invoice was posted. In AX 2012 R2, project items can be immediately consumed and invoiced to the project's contract funding source, before the vendor invoice for the purchase order is posted, even if an item requirement does not precede the purchase order.  |
| Reservation of funds in a project contract   | 2012 R2 | Project management and accounting | The funding limits in the project contract can now be used to track revenue that has not yet been posted as commitments. This functionality allows for more realistic limit checks, because the commitments are considered while the remaining available funds in a limit are computed. This tracking of commitments on a limit is available to all the source documents that have project functionality.   |
| Reverse an hour transaction for a project  | 2012 R2 | Project management and accounting | You can set up a reversing entry for hours that are posted to a project, and you can also specify the date on which the reversing entry is automatically posted. Previously, you could post a reversing entry only on the date on which you created the reversing entry.  |
| Generate project budget revenue amounts from budget cost amounts for a project   | 2012 R2 | Project management and accounting | After you enter cost amounts in a project budget, you can automatically generate the related revenue amounts in the project budget. One revenue line is added for each cost line.   |
| New Integration Solution for Microsoft Dynamics AX projects and Microsoft Dynamics CRM   | 2012 R2 | Project management and accounting | The Integration Solution for Microsoft Dynamics AX projects and Microsoft Dynamics CRM is built on Connector for Microsoft Dynamics. This solution enables the integration and synchronization of project quotations and projects between Microsoft Dynamics AX and Microsoft Dynamics CRM.   |
| Intercompany pro forma invoices for project costs  | 2012 R2 | Project management and accounting | You can create an intercompany pro forma invoice for items and services that are sent from one legal entity to another legal entity in your organization. You can specify the value and currency to use for the transferred costs.  |
| Create a WBS template for Microsoft Dynamics AX by using Microsoft Project   | 2012 R2 | Project management and accounting | You can create a WBS template in Microsoft Project that can be used in AX 2012. This template can be made available to selected companies in AX 2012, and can be used for both quotations and projects. In addition, because the template is based on a linked MPP file, information types that are used in Microsoft Project but not in AX 2012, such as types of resources that are required (material, work, and so on), are retained and maintained in Microsoft Project.   |
| Use Microsoft Project to create or update the work breakdown structure (WBS) for a Microsoft Dynamics AX project quotation               | 2012 R2 | Project management and accounting | You can now use the Microsoft Project client to create and update the WBS of a project quotation from AX 2012. You can also save the WBS for the quotation, in a Microsoft Project MPP file, in a SharePoint site.  |
| Use Microsoft Project to create or update a Microsoft Dynamics AX project plan, and integrate with an Office 365 SharePoint project site | 2012 R2 | Project management and accounting | You can use Microsoft Project and AX 2012 to manage a project that was created in either program, and changes can be synchronized between the two programs. This integration lets you assign workers from AX 2012 to tasks in Microsoft Project, and to associate tasks in Microsoft Project with project categories in AX 2012.  |
| Post store transactions from statements based on the end of the business day instead of the calendar day                                 | 2012 R2 | Retail                            | This feature adds an option for posting end-of-day statements for stores that have extended business hours. You can now calculate end-of-day transactions for statement processing based on the time that the store closes. However, in earlier releases, you could only post the statement based on the calendar day. If your store operating hours extended past 12:00 AM, two sales orders are created when you posted the statement. One sales order was created for sales transactions that occurred before 12:00 AM, and the other sales order was created for the transactions that occurred between 12:00 AM and the end of the business day. This feature lets you configure your statement posting process so that you can post the statements based on the end of the business day instead of the end of the calendar day. |
| You can use a new statement method to calculate statements by shift  | 2012 R2 | Retail                            | This feature adds a statement method so that stores can calculate statements by shift. When this option is selected for the store and the statement is generated, the transaction lines are summarized by payment method and shift. The summarized transaction lines are displayed in the Statements form, and the shifts are listed for each line. You can also select the Split by Statement method on the Statement/closing FastTab in the Stores form to generate a separate statement for each shift.  |
| Passwords can now be changed and reset in Retail POS   | 2012 R2 | Retail                            | In Retail POS, the following enhancements have been made: <ul style="list-style-type: none"> <li>o A cashier can change his or her password.</li> <li>o A cashier can have his or her password reset. For example, a cashier might forget his or her password.</li> </ul>   |
| Cashiers can view additional customer account information in Retail POS  | 2012 R2 | Retail                            | In Retail POS, the following enhancements have been made: <ul style="list-style-type: none"> <li>o Cashiers can view customer account balances.</li> <li>o Cashiers can view invoice accounts, if invoice accounts are present.</li> </ul>  |
| Group attributes and attribute groups, and apply them to products and categories in a catalog  | 2012 R2 | Retail                            | This feature lets users enhance their retail catalog offerings by including attributes for products in the catalog. You can create attribute groups for a set of defined attributes, and add the attribute groups to a catalog navigation category or a retail channel. Retail supports system properties and attributes, user-defined attributes, and rich media attributes, such as videos, images, or HTML text.   |
| Upgrade to global store and staff IDs  | 2012 R2 | Retail                            | The values for store and staff IDs are now stored in global variables. Global variables are unique across all companies in a partition. Tasks have been added to the Preprocessing data checklist to resolve this schema change from Microsoft Dynamics AX 2009 for Retail. Customer orders and order fulfillment have been expanded to include the following scenarios: <ul style="list-style-type: none"> <li>o An order is created online and picked up in a store.</li> <li>o An order is created online and shipped.</li> <li>o An order is created in a store and picked up in a store.</li> <li>o An order is created in a store and shipped.</li> </ul>   |
| Fulfill online retail orders in Microsoft Dynamics AX  | 2012 R2 | Retail                            | These orders are fulfilled in Microsoft Dynamics AX, and customers can be notified via email during various stages of order fulfillment. The Retail module now uses the catalog management feature that was introduced in Microsoft Dynamics AX.  |
| Support catalog management for the Retail module   | 2012 R2 | Retail                            | You can create one or more retail catalogs. Each catalog includes navigational categories, and each navigational category can include one or more product offerings that are assigned to a product assortment. Each offering can be enhanced by attributes that are included for the products at either the category level or the product level. You can assign the catalog to one or more retail channels. After a catalog is validated, reviewed, approved, and finally published, the catalog products are displayed as listings on the channels that the catalog is assigned to. Any changes to the catalog products can be reflected in the channels.  |
| Customer-facing device support   | 2012 R2 | Retail                            | Changes to the POS and EFT (electronic funds transfer) plug-in provide out-of-box support for customer-facing devices in the US. The changes also support partner plug-ins that give partners a head start in developing their own solutions for this kind of device.   |
| Time clock   | 2012 R2 | Retail                            | A time clock can be used to keep track of time and attendance for retail store employees. This feature consists of a time clock in Retail POS, manager viewing capability in Retail POS, and record keeping in Microsoft Dynamics AX.   |
| Customer orders from online stores   | 2012 R2 | Retail                            | Customer orders in the Retail module of Microsoft Dynamics AX and in Retail POS have been enhanced to support online stores. Orders that customers create in an online store can be shipped to the customers or picked up in brick-and-mortar stores. Email notifications are sent during the sales and shipping processes. Enhancements have also been made to the recall order and order list features.   |

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| Online marketplaces   | 2012 R2 | Retail   | Retailers can now set up and configure an online marketplace as a retail channel directly in Microsoft Dynamics AX. (Previously, this functionality was offered only on the web in Commerce Services.) Retailers can use online marketplaces to easily sell products online through established marketplaces, such as eBay and Amazon.com. Catalogs and product listings are centrally managed, and sales orders flow seamlessly back into Microsoft Dynamics AX for processing.  |
| Component names have changed  | 2012 R2 | Retail   | Retail Store Connect is now Commerce Data Exchange: Synch Service. Retail Transaction Service is now Commerce Data Exchange: Real-time Service.   |
| Retail reporting enhancements   | 2012 R2 | Retail   | AX 2012 R2 includes a new dedicated Retail cube that provides business intelligence data to help retailers make business decisions. You can customize the new Retail cube by adding data sources, measures, dimensions, calculations, key performance indicators (KPIs), and so on. You can also define your own reports by using Microsoft SQL Server Reporting Services or Microsoft Excel.   |
| Manually enter a coupon code for discount offers  | 2012 R2 | Retail   | This feature lets you manually enter a discount code for discount offers without having to create a campaign. Discount codes can be applied to both brick-and-mortar stores and online stores. If you create a discount code for a campaign and enter the discount code manually, the system does not use number sequences and bar codes to automatically generate the code. Instead, the system uses the manual code.  |
| Update the name of a party from the party record  | 2012 R2 | Sales and marketing                            | You can update the name of a party record in the party record's form or in the role form of the party record. For example, you can update the name of a customer from either the Party form or the Customer form.   |
| Generate a lead or opportunity record from a campaign or call list target record                      | 2012 R2 | Sales and marketing                            | You can generate a lead or opportunity record directly from the target record list of a campaign or call list. The campaign or call list information that is relevant to the new lead or opportunity record is automatically included in the new record.  |
| Cases are secured by case category  | 2012 R2 | Sales and marketing                            | You can grant permission to view and update cases, based on the case category type and the user's security role.  |
| Preserve a reservation for a partial quantity of an item  | 2012 R2 | Sales and marketing                            | When you process a sales order and create a purchase order because of insufficient stock of an item, any existing reservation for a partial quantity is preserved. Previously, the existing reservation was canceled if you processed a sales order by reserving the available stock of an item and then, before materials requirement planning (MRP) was run, created a purchase order for an additional quantity that was required to complete the order.   |
| Cancel all lines on a sales order   | 2012 R2 | Sales and marketing                            | You can cancel all order lines on a sales order in a single step. Previously, you had to cancel each order line on a sales order individually. You can also select multiple sales orders and cancel all the order lines for those sales orders. If some order lines that you select were already delivered, you receive a message that states that the order lines have already been delivered and cannot be canceled.  |
| Validate and post trade agreement journals more efficiently   | 2012 R2 | Sales and marketing                            | For this feature, a Cancel button was added in the Maintain group on the Action Pane on the Sales order tab in the All sales orders form.   |
| Calculate the sales price of an item by using an attribute-based pricing formula                      | 2012 R2 | Sales and marketing                            | You can update multiple sales prices and apply them to the related trade agreements. In cumulative update 6, you can validate and post changes to trade agreements in batches. This feature lets you control the timing and frequency of validation and posting to best suit your business.   |
| New purchasing policy: Price/discount transfer  | 2012 R2 | Procurement and sourcing                       | You can now calculate the sales price of an inventory item by using an attribute-based pricing formula. An attribute-based pricing identifier can be associated with a trade agreement for a specific batch of items. When a sales order that uses the trade agreement is invoiced, the net amount is adjusted according to the attribute values that are registered for the inventory batches that are received or produced.   |
| Financial dimensions can be specified on sales agreements or purchase agreements                      | 2012 R2 | Procurement and sourcing                       | You can use the new purchasing policy, Price/discount transfer, to control how prices are applied to purchase orders that are created from purchase requisitions for catalog items. Prices and discounts for catalog items can be calculated based on trade agreements, or they can be transferred directly from the purchase requisitions, depending on the requirements of your business. If you create a Price/discount transfer policy, users can override the policy on the purchase requisition line.   |
| A Totals FactBox is added to the Purchase orders list page  | 2012 R2 | Procurement and sourcing                       | You can now specify financial dimensions on sales agreements or purchase agreements. Dimensions can be added to the document headers or to individual lines. The financial dimensions of a sales or purchase order agreement are copied to the header of a sales or purchase order that refers to the agreement. The dimensions are then copied to the sales or purchase order lines when the agreement is referenced by the order lines.   |
| Integration of sales agreements and return orders   | 2012 R2 | Procurement and sourcing                       | The Purchase orders list page now has a FactBox that lists information such as the total amount, charges, and discounts for all purchase orders. The information is the same as the information that is available in the Totals form for purchase orders. The values that are displayed in the FactBox are not automatically updated if you make a change to a purchase order. To update the values, click the Refresh button, or open the Totals form. The data is also updated when you confirm a purchase order.   |
| Potency management  | 2012 R2 | Process manufacturing production and logistics | In AX 2012 R2, the sales return order line can be associated with the sales agreement line that is related to the order.  |
| Batch balancing for potency formulas  | 2012 R2 | Process manufacturing production and logistics | When you define an item, you can indicate that the item must have a specific concentration of an active ingredient. You can also adjust the quantity of material that is required in the production of the item, calculate the amount of money that is paid to a vendor for the item, and select an ingredient type for a formula line.   |
| Purchase pricing based on actual potency  | 2012 R2 | Process manufacturing production and logistics | You can add the actual value of a base inventory batch attribute to the registered inventory batch of a purchase order.   |
| Lot inheritance   | 2012 R2 | Process manufacturing production and logistics | You can set up a pricing formula for potency items that is based on batch attributes. You can also define specific items that can be invoiced, based on the actual potency of the material that is received.  |
| Batch order sequencing  | 2012 R2 | Process manufacturing production and logistics | You can configure an item so that its batch attributes and shelf life information are updated based on the ingredients of the formula that is used to produce the item. You can use shelf life inheritance to define items. This means that the inventory batch with the earliest shelf life dates is updated or inherited by the product characteristics of the finished items. For batch attributes, you can define attributes for both the finished items and their ingredients, and select which ingredients pass along their characteristics or attribute values to the finished items. You can also select to have co-products updated with the same shelf life and batch attributes. |
| Determine prices using a product configuration model  | 2012 R2 | Product information management                 | You can use product sequencing to define one or more sequences that are assigned to various items. Product sequencing means you can sort production into a required order, so that changeover times are automatically reduced in production.  |
| Create one or more one-time vendor accounts at the same time as you create invoices for those vendors | 2012 R3 | Accounts payable                               | You can now define individual prices for product options using a configuration model. Each component in a product configuration model has a base price. You can use expression rules to associate attributes with a value that affects the total price. When you configure a product and select a product option for the component, you can see how the option contributes to the total price of the product configuration model.   |
| General budget reservation source document added for planned purchasing                               | 2012 R3 | Budgeting                                      | When approval or a contract in the form of a purchase order is not required, you can quickly create invoices at the same time as you create records for the vendors. You can generate an account for a vendor directly from the invoice form. You can also import a CSV file that has information about multiple one-time vendors and corresponding invoices, and create vendor accounts and accompanying invoices.   |
| General budget reservation workflow   | 2012 R3 | Budgeting                                      | General budget reservations are documents often used by public sector entities to set aside or reserve budgeted funds so that they are not available for other purposes. Typically these reservations are made before any vendors have been selected for the purchase.  |
| Project accounting  | 2012 R3 | Budgeting                                      | For public sector, you can create a specific workflow for approving general budget reservations, and add a general budget reservation task to a purchase requisition workflow.  |
|   |         |  | For the public sector, if you use project accounting, you can include references to your project in general budget reservations. This can affect budgeting, committed costs, and funding-source reservations and consumption. For more information, see Use project accounting with general budget reservations (Public sector).  |



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| Determine and plan a top-down trade fund  | 2012 R3 | Trade allowance management | You can define merchandising events and assign a trade allowance to those events. You can also manage customers, invoices, or vendors that are related to the agreement. New trade agreements are set up in the Trade allowance management module.  |
| Manage trade fund budgets   | 2012 R3 | Trade allowance management | You can manage your trade fund budgets so that they include specific merchandise, promotion dates, and monetary value.  |
| Manage customer deductions  | 2012 R3 | Trade allowance management | You can process customer payments that include deductions. Customers can send payments that include a deduction for the amount of a rebate. You use the deduction workbench to match deductions to open credit transactions, split deductions, deny deductions, and write off deductions.   |
| Royalty payment management  | 2012 R3 | Trade allowance management | Royalty payment management lets you create an agreement between a licensee and a licensor. You can then manage payments between the two parties.  |
| Set up rebates that include deductions  | 2012 R3 | Trade allowance management | You can process customer payments that include deductions. You can send customer payments that include a deduction for the amount of a rebate. You use the deduction workbench to match deductions to open credit transactions, split deductions, deny deductions, and write off deductions.  |
| Set up vendor rebates   | 2012 R3 | Trade allowance management | When a sales representative establishes a promotion with a customer, a rebate can be created. By using vendor rebates, you can easily manage the discount process.  |
| Determine and plan a top-down trade fund  | 2012 R3 | Trade allowance management | You can define merchandising events, assign a trade allowance to those events, and manage customers, invoices, or vendors that are related to the agreement. New trade agreements are set up in the Trade allowance management module.  |
| Opening transactions (year-end closing)   | 2012 R3 | General ledger             | In earlier releases, the transfer of opening balances for more than one company at a time caused performance issues. You can now transfer the opening balances for balance sheet accounts to a new fiscal year in multiple companies at the same time.  |
| Sales taxes and ledger accounts can be reconciled more easily   | 2012 R3 | General ledger             | In earlier releases of AX 2012, it was difficult to reconcile sales tax amounts with ledger accounts. Now, the Sales tax specification by ledger account report includes options that let you sort the report by sales tax code or ledger account, include subtotals by sales tax code, and print only totals or both totals and details.   |
| Accounting for stocked items on product receipts and vendor invoices                                  | 2012 R3 | General ledger             | The results of the accounting entries for stocked items on product receipts and vendor invoices are combined into one subledger journal entry and voucher.<br>Accounting entries for Purchase expenditure, un-invoiced are not transferred to the general ledger if the amount for both the accounting currency and the reporting currency adds up to 0 (zero) per voucher, currency code, and ledger dimension.<br>Accounting entries for Purchase expenditure for product are transferred in summary form to the general ledger per voucher, currency code, and ledger dimension.   |
| Family and Medical Leave Act  | 2012 R3 | Human resources            | You can now do the following for the Family and Medical Leave Act (FMLA): <ul style="list-style-type: none"> <li>Define and view eligibility and benefit limits for your organization.</li> <li>Set up case security.</li> <li>Create and manage FMLA cases.</li> <li>Run reports.</li> </ul>   |
| Changes to the Forecast positions area  | 2012 R3 | Human resources            | <ul style="list-style-type: none"> <li>To ensure that a budget forecast is accurate and complete, you can now copy the worker's fixed compensation earnings to the forecast position's earnings budget cost element.</li> <li>You can copy a forecast position with its attributes, including its cost elements, to a different budget planning scenario.</li> <li>You can add cost element lines that include compensation increases to the forecast position, to account for the cost of upcoming compensation increases. For forecast positions that have an assigned compensation group, level, and step, you can add a budget cost element at the next highest step for the same level.</li> <li>To ensure accurate budget amounts throughout the year, you can use the forecast position's cost element start date as the effective date of the budget plan line.</li> <li>You can enter upcoming compensation table increases so that the budgeted earnings costs will include the increases. The original compensation table and the increased table exist in the system at the same time.</li> </ul> |
| Total compensation statements   | 2012 R3 | Human resources            | You can set up and print total compensation reports for employees. A total compensation statement is comprised of sections which contain compensation elements such as benefits, tax codes, and earning codes. You can add any combination of compensation elements to each total compensation statement section. The three types of compensation elements that can be added to a total compensation statement section are: benefits, earnings, and taxes.  |
| Automatically calculate regular rate of pay earnings  | 2012 R3 | Payroll                    | The Fair Labor Standards Act (FLSA) provides the framework for U.S. organizations to pay overtime to workers. One part of FLSA defines the way that the premium portion of overtime pay must be calculated. Failure to calculate the overtime payment correctly can open up the organization and its management team to significant fines and penalties.<br>By using earning codes that have a rate basis of regular rate of pay to calculate and pay overtime premiums (instead of a standard 1.5x or 2.0x overtime code), the premium calculation will be made according to FLSA rules.   |
| Generate premium earnings based on characteristics of the worker or position, or on other earnings    | 2012 R3 | Payroll                    | You can now use the Dynamics AX policy framework to automatically determine when workers qualify for premium earnings such as shift differentials or certifications held by workers. The premium generation process then calculates the amount of the earnings and adds the appropriate lines to worker pay statements.   |
| Generate retroactive earnings   | 2012 R3 | Payroll                    | You can now automatically generate retroactive earnings statement lines when a worker receives earnings for past services at a new rate. An example might be an increase in compensation that was agreed on after the worker was already paid.  |
| Additional flexibility for benefit accrual plans  | 2012 R3 | Payroll                    | New options allow you more flexibility to define when accrual plan benefits are accrued and used.   |
| Pay statements with zero earnings   | 2012 R3 | Payroll                    | You can now manually generate a pay statement without earnings included. You might do this to update only benefit or tax deductions and contributions. For more information, see Pay statements and the payment generation process.   |
| Publishing a request for quotation (RFQ)  | 2012 R3 | Public sector              | You can publish an RFQ to the public Vendor portal so that unregistered vendors can view it. All lines of the RFQ are also sent to the vendors that are selected in the RFQ.  |
| Viewing details of closed RFQs  | 2012 R3 | Public sector              | Public sector vendors can view all open and closed purchase orders, RFQs, and their details. These details include scoring information and award notes about bids that are accepted.  |
| Creating one or more one-time vendor accounts at the same time as creating invoices for those vendors | 2012 R3 | Public sector              | When approval or a contract in the form of a purchase order is not required, you can quickly create invoices at the same time as creating records for the vendors. You can generate an account for a vendor directly from the Invoice form. You can also import a CSV-formatted file of information for multiple one-time vendors and corresponding invoices, and create vendor accounts and accompanying invoices.   |
| Permitting only invited vendors to bid on an RFQ on the Vendor portal                                 | 2012 R3 | Public sector              | You can specify that a published request for quotation having a specific solicitation type is visible only to vendors who are included on the RFQ.  |
| Controlling which details vendors see about closed RFQs on the Vendor portal                          | 2012 R3 | Public sector              | You can specify which elements to allow vendors to see on the Closed requests for quotations page.  |

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| Publishing an RFQ to the Vendor portal and sending it to a vendor at the same time   | 2012 R3 | Public sector        | The Send button on the RFQ Action Pane has been replaced by a Send and publish to Vendor portal button, allowing one-step distribution to vendors.   |
| Streamlining the Vendor portal signup process  | 2012 R3 | Public sector        | Vendor users can search to see if their organization is already registered, and add themselves to that record. This can streamline the signup process.   |
| (Public sector) General budget reservation source document added for planned purchasing  | 2012 R3 | Public sector        | General budget reservations are documents often used by public sector entities to set aside or reserve budgeted funds so that they are not available for other purposes. Typically these reservations are made before any vendors have been selected for the purchase.   |
| General budget reservation workflow  | 2012 R3 | Public sector        | For public sector, you can create a specific workflow for approving general budget reservations, and add a general budget reservation task to a purchase requisition workflow.   |
| Project accounting   | 2012 R3 | Public sector        | For the public sector, if you use project accounting, you can include references to your project in general budget reservations. This can affect budgeting, committed costs, and funding-source reservations and consumption.  |
| Use cross-docking to move packages of products through a warehouse while using limited or no storage                                   | 2012 R3 | Warehouse management | Cross-docking is useful if you purchase products from different vendors, the vendors prepack cartons that contain a mix of products or product variants, and you want distribute the cartons to one or more retail stores. This feature works with or without the Warehouse management module.   |
| Set up a company policy for sales order fulfillment and create batch jobs to release sales orders and transfer orders to the warehouse | 2012 R3 | Warehouse management | You need to set up a default company policy for sales order fulfillment rates. The policy controls the percentage of the total price or the quantity of an order that must be reserved physical before a sales order can be released to the warehouse. You can also set up a policy for specific customers. Customer-specific policies override the default policy.  |
| Allocate batch numbers in Warehouse management   | 2012 R3 | Warehouse management | You can define policies that control when batch numbers are allocated by setting up one or more number groups, and then assigning them to products. It's possible to allocate batch numbers when you perform a physical receipt of a product, or when you create a line that includes a product on a source document, such as a purchase order. You can also manually allocate batch numbers to products.  |
| Receive items at a different warehouse than expected   | 2012 R3 | Warehouse management | You can set up a mobile device to receive loads or items at a warehouse that differs from the warehouse that was specified on the source document. When you receive the load or item, it's located at the new warehouse and all related work is created for the new warehouse.   |
| Use product variants in warehouse management processes   | 2012 R3 | Warehouse management | Product variants are defined by product masters with product dimension variations, for example, a single towel in different sizes and colors. Instead of creating multiple products, you create a single product master and use the various combinations of sizes and colors as different product variants. You can use product variants in the following processes: <ul style="list-style-type: none"> <li>o To define stocking limits.</li> <li>o To configure work confirmation and bar code scanning on mobile devices.</li> <li>o To create replenishment templates.</li> <li>o To set up rules for converting units of measure.</li> <li>o To assign fixed warehouse locations.</li> </ul> |
| Use additional production processes in a warehouse   | 2012 R3 | Warehouse management | It's now possible to use the following production processes in a warehouse: <ul style="list-style-type: none"> <li>o Deliver picked materials to the exact locations where the materials are consumed in production.</li> <li>o Define a specific output location for a production order or a batch order. This enables the warehouse worker to know exactly where to pick up the goods for put away work.</li> <li>o Generate put away work for warehouse-enabled items when you use the reporting as finish process on the Microsoft Dynamics AX client. (Previously you could only do this from a mobile device.)</li> </ul>  |
| Use bar code lookup in inbound processes   | 2012 R3 | Warehouse management | Bar code lookup functionality can be used with products and product variants to support several inbound operations that are carried out by warehouse workers on mobile devices.  |
| Improvements to replenishment  | 2012 R3 | Warehouse management | It's possible to set up demand replenishment so that it checks whether there's any demand replenishment work that's been created in the same location that is not yet finalized. If existing work is found with an appropriate quantity available, the existing work will be used instead of creating new replenishment work.  |
| Lists on the mobile device menu  | 2012 R3 | Warehouse management | It is now possible to display a list of open work items on warehouse mobile devices. The list can be configured to filter on different fields and the user can select any work displayed on the list to be directed to its specific instructions.  |
| Enable transfer orders on the packing station  | 2012 R3 | Warehouse management | It is now possible to manually pack transfer orders from the packing station. This is particularly useful in retail environments where you want to pack cartons in order to refill retail stores from a distribution center.   |
| Use additional strategies when moving inventory  | 2012 R3 | Warehouse management | Two new locations directive action strategies are now supported for the work order type Inventory movement: Consolidate and Empty location with no incoming work.  |
| Use additional production processes in a warehouse   | 2012 R3 | Warehouse management | You can now report as finished on a mobile device in overproduction scenarios.   |
| Batch reservation strategy improvements  | 2012 R3 | Warehouse management | The following improvements have been made to batch reservation strategies: <ul style="list-style-type: none"> <li>o The FEFO batch reservation strategy now takes the Best before date and the Expiration date of the batches into account.</li> <li>o It is now possible to reserve items across different batch numbers when releasing sales orders.</li> </ul>  |
| Improvements to auto-release to warehouse process  | 2012 R3 | Warehouse management | When using the auto-release to warehouse process it is now possible to consolidate multiple sales orders for the same customer into a single shipment if the Consolidate shipment at release to warehouse parameter is set on the Warehouse form.  |
| Workflows  | 2012 R3 | Warehouse management | Configure inbound and outbound workflows for standardized processes in Production and Inventory management.  |
| Cluster picking  | 2012 R3 | Warehouse management | Assign orders to clusters to pick from a single location and configure profiles to control the validation and packing of items into shipping containers.   |
| Wave processing  | 2012 R3 | Warehouse management | Create and release work through automatic or manual processing of waves. For example, you can use waves to create, process, and release picking work for outbound loads or shipments.  |
| Containerization   | 2012 R3 | Warehouse management | Set up container groups to sequence packing processes and create templates that support packing strategies. For example, by using automated containerization, you can have containers and picking work created for shipments when a wave is processed.   |
| Deferred reservation strategy  | 2012 R3 | Warehouse management | Defer reservation details beyond the point of entering an order. The deferred reservation strategy is based on a reservation hierarchy, which you can assign to inventory items.   |
| Work   | 2012 R3 | Warehouse management | Monitor the processing and the amount of work in a warehouse, push work to dedicated warehouse workers, and trace completed work.  |
| Integration with the Quality control module  | 2012 R3 | Warehouse management | Include quality control in any inbound or outbound processes that you set up for warehouse items. For example, the quality control features enable you to prevent reservation of items that have not passed a quality test.  |

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| Mobile devices   | 2012 R3 | Warehouse management                           | Use scanners and other mobile devices to optimize precision in the picking and put-away processes. You can configure the flow for system-directed push strategies and user-directed pull strategies.   |
| Inventory control  | 2012 R3 | Warehouse management                           | Set up cycle counting thresholds, schedule plans, apply ad-hoc cycle counting, and configure real-time replenishment.  |
| Waves can now contain different order types                      | 2012 R3 | Warehouse management                           | It is now possible to process a wave that includes multiple shipments from both sales and transfer orders. This is useful when you are planning waves according to destinations of shipments.  |
| Compare item prices  | 2012 R3 | Inventory management                           | <p>The Compare item prices report enables you to compare the prices in a costing version to the pending prices in another costing version or to the active prices as per an effective date. For standard costs, the report compares the aggregate level and the cost rollup level.</p> <ul style="list-style-type: none"> <li>○ At the aggregate level, the report compares the total aggregated cost per item, item variant, and site.</li> <li>○ At the cost rollup level, the report compares the cost rollup for each cost group per item, item variant, and site.</li> </ul> <p>The posting routine in the BOM journal is redesigned and enhanced. When you post a BOM journal, you post the journal to inventory profit and loss accounts instead of production WIP accounts. This way, the imbalance expires and does not remain on the WIP account. For actual costs, a negative BOM journal leaves a balance on the WIP account. This imbalance is posted to general ledger as profit and loss.</p> <p>The Inventory aging report displays the on-hand quantity, inventory value, and the related aging periods for a selected item or an item group. You can use the report parameters to filter the data that will be displayed in the report.</p>  |
| BOM journal posting  | 2012 R3 | Inventory management                           | Configure rating structures and shop for rates based on charges, such as fuel and customs duties. For example, the rate of an assignment can reflect the price of fuel in the state or the country/region where the transport is carried out.  |
| Inventory aging report   | 2012 R3 | Inventory management                           | Set up route plans and route guides for complex transportation processes and determine carriers' routes based on mode. Based on the routing information, you can select the route that fits your needs. For example, if you prioritize price over time, you might want to plan a route that uses a train for transportation instead of an airplane.  |
| Rating   | 2012 R3 | Transportation management                      | Use transportation engines to define the logic that is used for rating and routing in Transportation management. A transportation engine can be used to calculate specific task information, such as a carrier's transportation rate.  |
| Routing  | 2012 R3 | Transportation management                      | Use an automatic or a manual process to reconcile freight bills with invoices.   |
| Transportation engines   | 2012 R3 | Transportation management                      | Set up appointment types and set up appointment notifications as batch jobs to track upcoming appointments. For example, you can create an appointment schedule for a warehouse to send periodic notifications for scheduled appointments.   |
| Freight reconciliation   | 2012 R3 | Transportation management                      | The Bill of Lading now includes additional fields and it's possible to edit the Bill of Lading before printing it.   |
| Appointment scheduling   | 2012 R3 | Transportation management                      | It is now possible to print multiple packing slips directly from the load planning workbench by selecting multiple loads.  |
| Improvements to the Bill of Lading                               | 2012 R3 | Transportation management                      | There's a new Freight reconciliation option on the Transportation management parameters form. If freight reconciliation is not used you can de-select this option and no freight bill records will be created.   |
| Printing multiple packing slips in the Load planning workbench   | 2012 R3 | Transportation management                      | <p>Demand forecasting is a set of tools that enable you to estimate future demand and create demand forecasts based on historical transaction data. The demand forecasting process includes the following tasks:</p> <ul style="list-style-type: none"> <li>○ Complete the prerequisite setup tasks before you can use demand forecasting.</li> <li>○ Create a baseline forecast from historical demand data that is gathered and loaded in a Microsoft SQL Server Analysis Services cube.</li> <li>○ Open the demand forecast file, and use the PivotTable tools in Excel to filter and display the forecast data that is stored in the cube.</li> <li>○ Import a demand forecast to Microsoft Dynamics AX so specific companies and forecast models can use the forecast data as input to master planning.</li> </ul> <p>You can specify whether a customer forecast is included in the overall forecast. This setting determines how actual demand reduces the forecasted demand. You can use this setting to ensure that master planning covers the supply of items that are purchased by specific customers.</p> <ul style="list-style-type: none"> <li>○ If a customer forecast is included in the overall forecast, actual customer demand reduces both the customer forecast and the overall forecast. Master planning generates planned orders to cover only the overall forecast quantity.</li> <li>○ If a customer forecast is not included in the overall forecast, actual customer demand reduces only the customer forecast. Master planning generates planned orders to cover both the overall forecast quantity and the forecast for each customer quantity.</li> </ul> <p>The Include customer forecast in the demand forecast check box is located in the Coverage groups form.</p> <p>You can select the start time to schedule production orders. The start time can be the start of the calendar work day or the current time. The current time option is used with the delivery date control and capable to promise (CTP) feature.</p> <p>The Scheduling start time field is located in the Master planning parameters form.</p> |
| Enabling freight reconciliation                                  | 2012 R3 | Transportation management                      | New options have been added to the customer rebate agreement form for item selection, cumulation, and line breaks.   |
| Demand forecasting   | 2012 R3 | Master planning                                | You can specify an expiration date and time on a request for quotation (RFQ) so that bids are received in a timely manner.   |
| Forecast reduction for a customer or customer group              | 2012 R3 | Master planning                                | You can specify that bids (replies to an RFQ) are sealed until the solicitation closing date. They are hidden until bid tabulation starts.   |
| Start time for production scheduling                             | 2012 R3 | Master planning                                | You can define sets of scoring criteria and scoring methods that will be used for evaluating bids (RFQ replies).   |
| Enhanced functionality for customer rebate agreements            | 2012 R3 | Process manufacturing production and logistics | You can create solicitation types in order to match procurement requirements in your organization. You can filter on those categories to make finding documents easier.  |
| Setting a request for quotation expiration date and time         | 2012 R3 | Procurement and sourcing                       | You can allow vendors to provide alternate items or services, so that you can be notified of better alternatives or changes to the requested item or service.  |
| Specifying a sealed bidding process                              | 2012 R3 | Procurement and sourcing                       | Each line in an RFQ is assigned a number. You can add items and renumber the list as needed. The numbers appear in all the RFQ-related documents.  |
| Creating scoring methods and criteria so that you can score bids | 2012 R3 | Procurement and sourcing                       | You can easily add vendors to the RFQ who are approved for selling at least one of the categories you've specified on the RFQ lines.   |
| Creating custom solicitation types                               | 2012 R3 | Procurement and sourcing                       | You can create and administer a questionnaire by either collecting questions from other users, attaching one or more questionnaires to an RFQ at the header level, or requiring vendors to complete the questionnaire as part of the reply.  |
| Authorizing alternate or substitute items in bids                | 2012 R3 | Procurement and sourcing                       | After you issue an RFQ, you can make updates and add attachments as long as no replies have been registered. You can communicate these changes through the Vendor portal to keep prospective bidders aware of updates.   |
| Assign numbers to lines in an RFQ                                | 2012 R3 | Procurement and sourcing                       | You can compare bids, and rank them at the header level. You can filter and sort for the most relevant information.  |
| Automatically add vendors to an RFQ                              | 2012 R3 | Procurement and sourcing                       | You can hold a requisition from further processing and indicate the reason for the hold, so that you can better manage requisitions and communicate status.  |
| Creating a questionnaire for vendors                             | 2012 R3 | Procurement and sourcing                       |  |
| Amending an RFQ or attaching documents after sending it          | 2012 R3 | Procurement and sourcing                       |  |
| Ranking received bids  | 2012 R3 | Procurement and sourcing                       |  |
| Placing a purchase requisition on hold                           | 2012 R3 | Procurement and sourcing                       |  |

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| Publishing an RFQ  | 2012 R3 | Procurement and sourcing          | You can publish your RFQ to the public Vendor portal so that unregistered vendors can view it. All lines on the RFQ are also sent to the vendors that are selected in the RFQ.   |
| Creating vendor rebate agreements  | 2012 R3 | Procurement and sourcing          | You can set up vendor rebate agreements to define the rebates that vendors (suppliers) offer to your company. Rebate amounts can be based on the monetary value of the purchase or the number of items that are purchased.   |
| Working with vendor rebates  | 2012 R3 | Procurement and sourcing          | You can apply vendor rebates to purchase orders and process rebate claims.   |
| Viewing price details for purchase order lines                             | 2012 R3 | Procurement and sourcing          | The Price details form displays detailed information about the prices, agreements, and trade agreements that are associated with the product in a purchase order line. This information is used to calculate discounts, rebates, margins, and royalties for the order line.  |
| Using the direct delivery workbench  | 2012 R3 | Procurement and sourcing          | Use the direct delivery workbench to create and manage purchase orders for direct deliveries.  |
| Creating a contact for an existing unsolicited vendor                      | 2012 R3 | Procurement and sourcing          | You can create a contact record from the record of an unsolicited vendor.  |
| Adding claims-authenticated users.   | 2012 R3 | Procurement and sourcing          | As part of the process for creating new users, Vendor portal administrators can add a vendor that will sign into the portal by using an email address from one of various providers, such as Facebook, Yahoo.com, or Windows Live (Microsoft account). Microsoft Dynamic AX authenticates the user through email.  |
| Streamlining the Vendor portal signup process                              | 2012 R3 | Procurement and sourcing          | Vendor portal signup improvements include being able to specify a default country/region for vendors, require specific fields in the signup forms, and specify levels of product categories for vendors. For Public sector, vendor users can search to see if their organization is already registered and add themselves to that record. This can streamline the signup process.  |
| Using claims-mode authentication for registered vendors                    | 2012 R3 | Procurement and sourcing          | After registering with your business or organization, vendors can access the Vendor portal outside your Active Directory domain by using one of the following types of accounts: Windows Live (Microsoft account), Yahoo, or Facebook.   |
| Controlling which details vendors see for closed RFQs on the Vendor portal | 2012 R3 | Procurement and sourcing          | For public sector users, you can specify which elements to allow vendors to see on the Closed requests for quotations page.  |
| Billing rules for project milestones                                       | 2012 R3 | Project management and accounting | <p>You can create an on-account billing rule for projects. You can then automatically create customer invoices that are based on the project milestones that you specify. When work on the project reaches a specified milestone, you can set the status of the milestone as complete and then generate an on-account invoice for the milestone.</p> <p>In AX 2012, a preliminary invoice is known as an invoice proposal. After you create an invoice proposal for project transactions, you can modify the sales price for the project transactions in the invoice proposal. You can also create and add a fee transaction to the invoice proposal.</p> <p>In the Project budget balances form, you can view summaries of project budget balances according to the following criteria:</p> <ul style="list-style-type: none"> <li>○ Transaction type</li> <li>○ Category group</li> <li>○ Cost template</li> <li>○ Category</li> </ul> <p>AX 2012 R3 builds on the system for managing worker resource assignments that was introduced in cumulative update 7 for Microsoft Dynamics AX 2012 R2. Project managers now have additional options in AX 2012 R3:</p> <ul style="list-style-type: none"> <li>○ You can view text descriptions of worker availability in resource scheduling grids, such as Partially available and Booked. These text descriptions are used in addition to the colors that were introduced in cumulative update 7 for Microsoft Dynamics AX 2012 R2 to identify worker availability.</li> <li>○ You can schedule workers on an activity for a specific number of hours.</li> <li>○ You can convert selected soft-booked hours to hard-booked hours directly from the project team.</li> <li>○ The concept of reserving workers has been renamed booking workers.</li> </ul> |
| Modify project transactions in an invoice proposal                         | 2012 R3 | Project management and accounting |  |
| Access additional views of project budget balances                         | 2012 R3 | Project management and accounting |  |
| Enhancements to tools for scheduling worker resources                      | 2012 R3 | Project management and accounting | <p>In Microsoft Dynamics AX 2012 R3 CU8, you can integrate with Microsoft Exchange Server, as an alternative to the existing Microsoft Outlook integration. This integration allows you to synchronize Exchange appointments, tasks, and contacts with Microsoft Dynamics AX. This integration enables employees who work in a remote desktop or terminal server environment to efficiently leverage the integration feature.</p> <p>You can now view detailed information about discount transactions. This information is available from the following locations:</p> <ul style="list-style-type: none"> <li>○ A command in the Retail store transactions form</li> <li>○ A command in the Transactions form</li> <li>○ The Business Intelligence (BI) cube.</li> </ul> <p>You can use price groups to more easily create and manage prices and discounts for retail products. For example, you can use price groups to offer specific products at different prices to different groups of customers in different stores. A price group is the central point in a many-to-many relationship between prices and discounts on the one hand, and channels, catalogs, affiliations, and loyalty programs on the other hand.</p>  |
| Integrate Microsoft Exchange Server with Microsoft Dynamics AX             | 2012 R3 | Sales and marketing               |  |
| View information about discount transactions                               | 2012 R3 | Retail                            |  |
| More flexible retail discounts   | 2012 R3 | Retail                            |  |
| Create return locations  | 2012 R3 | Retail                            | <p>You can specify that returned products are assigned to different return locations in inventory, depending on the cashier's response to info codes that are displayed at the point of sale. A return location can be a store, a warehouse, a location in a store or warehouse, or a specific pallet, depending on the locations that your organization has set up. You can map each return location to one or more Retail info codes and Sales and marketing reason codes.</p>   |
| Category-based pricing   | 2012 R3 | Retail                            | <p>You can specify category-based pricing to more easily manage pricing for many products at the same time. For example, you can apply a markup of 10 percent to children's shoes or mark down a particular vendor's tennis rackets by 20 percent.</p> <p>You can group and package individual products in one sellable unit or product kit. A product kit can include multiple products, variants of those products, and substitutes for any products. The products that are included in a kit are referred to as components. The set of products that make up a product kit are referred to as kit configurations. One product kit can have one or more configurations.</p> <p>After you define the kit configurations, you release the product kit to your legal entities and set up any product properties for the kit. You can price the kit by using the sum of the base price of the kit components when they are added to the kit, or you can set an overall kit price. The kit price can also be adjusted at the time of sale if additional charges apply for products that are substituted for a standard kit component.</p> <p>After the kit is created and priced, you can generate assembly orders to send the assembly and packaging instructions to the warehouse, so that the kits can be picked, packed, and shipped to the stores. After the kit configurations are approved, assembly orders can be manually generated at the warehouse or from a sales order if kit components are out of stock. Product kits can also be disassembled at the POS register or at the warehouse.</p> <p>When assembly or disassembly orders are created and processed, bill of materials (BOM) journals are generated to create the required inventory transactions.</p>                              |
| Create and maintain product kits   | 2012 R3 | Retail                            |  |
| Retail monitoring in System Center Operations Manager                      | 2012 R3 | Retail                            | You can now monitor your Retail environment by using System Center Operations Manager. The System Center Management Pack for Retail in AX 2012 R3 provides a monitoring solution for Microsoft Dynamics AX Retail components. The management pack automatically discovers the Retail components in your environment, and monitors the configuration and availability of those components. The management pack provides early warnings that an operator can use to proactively identify issues that can affect the availability of the Retail system.   |
| Retail SDK   | 2012 R3 | Retail                            | The Retail SDK is enhanced to include code samples, templates, and tools that you can use to customize new Retail clients.   |

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| Setup.exe support for starter stores  | 2012 R3 | Retail      | In AX 2012 R3, you can install any Retail online starter store by using Setup.exe. However, you can still manually deploy the starter stores by using Windows PowerShell.  |
| Retail Server   | 2012 R3 | Retail      | Retail Server is the primary server-side component for Retail Modern POS. This feature processes business logic for Retail Modern POS. Retail Server is to Retail Modern POS clients what Microsoft Dynamics AX Application Object Server (AOS) is to Microsoft Dynamics AX clients. You can deploy Retail Server in a store or in a data center. Retail Server must communicate with a software component of AX 2012 R3 that is named Retail Hardware Station.  |
| The PCI Implementation Guide has been updated for Microsoft Dynamics AX 2012 R3 CU8 | 2012 R3 | Retail      | The PCI Implementation Guide has been updated for Microsoft Dynamics AX 2012 R3 CU8 to reflect enhancements to Dynamics Online Payment Services online payment processing in Modern POS. The enhancements include authorization, capture, refund, and void card processes for pay-n-carry transactions and customer orders. The PCI Implementation guide also incorporates comments by the Payment Application Data Security Standard (PA-DSS) audit.  |
| Shared shifts can be used in Microsoft Dynamics AX Retail and Modern POS            | 2012 R3 | Retail      | In this release of Microsoft Dynamics AX and Modern POS, you can use shared shift in your retail stores. Because Modern POS can run on Modern devices, multiple employees must have access to multiple cash drawers, receipt printers, etc. during a shift. Also, new staff permissions control access to opening and closing shared shifts.   |
| Retail management pack updated  | 2012 R3 | Retail      | The Management Pack for Microsoft Dynamics AX Retail 2012 R3 has been updated to monitor the system for key failure states, and collect events for all Retail components. Support for monitoring modern Point of Sale devices and other Point of Sale devices has also been added.   |
| Self-service deployment for store components  | 2012 R3 | Retail      | In AX 2012 R3 and previous releases of AX 2012, setting up a new retail store or updating the software at existing stores is a long and complicated process. A system administrator must install multiple Retail components on multiple computers at each store. It can take days to install and configure all of the required components on all affected computers. In CU8, a self-service deployment option is available. In a self-service deployment, users at each store can easily install the software that is required at the store. At headquarters, the system administrator plans the topology of the store and the software that must be installed on each computer. Then the system administrator enters deployment information in Microsoft Dynamics AX. The user at the store is provided with basic information about how to deploy the components that the administrator has specified, including a URL where the user can download an installation package and a password to securely decode the installation package. The user goes to each computer in the store and runs the installation package. Special permissions and knowledge of the deployment topology are not necessary to complete the deployment. |
| A new retail channel type is added: call center                                     | 2012 R3 | Call center | In a call center, workers take customer orders over the phone and create sales orders. Call centers can be added to organization hierarchies, and can be managed together with online stores and retail stores.  |
| Additional item information   | 2012 R3 | Call center | New call centers are set up in the Retail module. Many typical management tasks for a call center are performed in the Call center module. Associate details with sales items. This feature lets you view additional information about the selected line in the sales order form, such as images, purchase order information, delivery dates, and other relevant text.   |
| Create scripts for call center workers  | 2012 R3 | Call center | Scripts are predefined messages that call center workers can read to customers during order entry. You can create scripts that appear in the sales order form at the time of order entry. You can also translate scripts and store various language versions that call center workers can easily access.   |
| Up-sell and cross-sell products   | 2012 R3 | Call center | Prompt the clerk who enters sales orders to encourage or discourage items during order entry. You can base these prompts on single items or item combinations that are entered at the time of order entry. You can also specify start and end dates for the prompts.   |
| Continuity programs   | 2012 R3 | Call center | Set up and manage continuity programs, in which customers receive regular product shipments on a predefined schedule.  |
| Create orders from item lists   | 2012 R3 | Call center | Set up an item list, which is a saved list of products that customers frequently order together. At the time of order entry, a call center worker can open an item list and select the items that the customer wants to order. This feature offers a quick and easy method for creating new orders.  |
| Perform full-text searches for products in the sales order form                     | 2012 R3 | Call center | Search for products from the Item number field in the sales order form. You can set up field criteria and parameters to determine how the search is performed. The search results show a list of products that match the search term, and also include availability information for each product in the list.  |
| View margin alerts  | 2012 R3 | Call center | View the calculated margin values for broker royalties and rebates in the sales order form.  |
| Default sales tax groups  | 2012 R3 | Call center | Use default sales tax groups to create and view default priorities for calculating sales tax groups. This feature lets you match address fields to the appropriate tax group for each order.   |
| Use coupons in sales orders   | 2012 R3 | Call center | Create coupons that can be applied to call center sales orders. Coupons can specify either a percentage or a specific amount that is subtracted from the order total. You can also create coupons that are intended for one-time use.  |
| Use installment payments in sales orders  | 2012 R3 | Call center | Set up a payment schedule that appears as one of the payment options in the sales order form for call center users. The following new features have been added: <ul style="list-style-type: none"> <li>You can specify which individual customers and products are eligible for installment billing.</li> <li>Installment billing can use "on account" payment.</li> <li>You can associate a payment schedule with a catalog.</li> </ul>   |
| Broker support  | 2012 R3 | Call center | Ship sales orders from brokers directly to the broker's customers. The appropriate fee can also be paid to the broker.   |
| Put sales orders on hold  | 2012 R3 | Call center | Create user-defined hold codes that include details about who put the order on hold and when. After a hold is cleared, the order is automatically sent for picking and shipment.   |
| Expedite orders   | 2012 R3 | Call center | Set up an expedited shipping mode that can be applied to a sales order or sales order line. When you select the expedited mode, the order or order line is flagged as expedited in the picking list. You can also set up a mode that indicates low shipping priority for an order.   |
| Automatic notification and cancellation for backorders                              | 2012 R3 | Call center | Automatically notify customers by email when orders are not shipped by the expected date. You can also configure the system to cancel orders that are not shipped within a specified period after the order date.  |
| Track sales order events  | 2012 R3 | Call center | Define the order details that are tracked for reporting and evaluation.  |
| View detailed order status  | 2012 R3 | Call center | View detailed information about the status of sales orders and sales order lines. From the sales order form, you can view status information for the following areas: <ul style="list-style-type: none"> <li>Payments</li> <li>Picking and packing</li> <li>Delivery</li> <li>Invoicing</li> <li>Holds</li> <li>Backorders</li> <li>Returns</li> </ul>   |
| Order notes   | 2012 R3 | Call center | Attach notes to a customer, order, or order line.  |
| Customer letters  | 2012 R3 | Call center | Define letter templates that can be used to generate personalized customer communications.   |
| Fraud handling  | 2012 R3 | Call center | Define fraud rules to warn call center workers about potential fraud situations. You can also define special hold codes that are automatically or manually applied to suspicious orders.   |
| Perform RFM analysis on customers   | 2012 R3 | Call center | Track the frequency and monetary value of a customer's previous purchases, and convert this data into a score. The score is displayed in the sales order form whenever the customer places an order and can be viewed by the call center worker who takes the order.   |

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| Track customer statistics   | 2012 R3 | Call center     | Calculate statistics about customer orders. Data includes the date of the first order, the date of the last order, the total amount that has been invoiced, and the total returns.  |
| Enhanced functionality for customer service   | 2012 R3 | Call center     | <p>Use the following new customer service features in a call center:</p> <ul style="list-style-type: none"> <li>○ Import a file that indicates duplicate customers.</li> <li>○ Import lists of business relations or business prospects.</li> <li>○ Import a change-of-address file. You can inactivate invalid addresses and update addresses.</li> <li>○ Use the new customer service form to perform the following tasks:</li> </ul> <p>- Search for customers by keyword, telephone number, sales order, or customer account number. You can use wildcard characters in customer searches.</p> <p>- View detailed customer information, such as contact information, notes, sales order lines, and events.</p> <p>- Track and fulfill customer requests for catalogs.</p> |
| Track customer cases  | 2012 R3 | Call center     | This feature adds hot alerts to case management. Customer-specific hot alerts automatically prompt the call center user when important customer-specific information is available.  |
| Purge sales history   | 2012 R3 | Call center     | Delete old sales orders for a call center. You can still view the sales order numbers and a summary of the details for each sales order.  |
| Get a quick overview of the inventory balance, the work in progress (WIP) inventory balance, and what the inventory inflow and outflow have been for the selected fiscal year | AX7     | Cost management | The Cost administration workspace contains a section where the inventory statement or WIP inventory statement is presented for the selected fiscal period. The statement is based on a data set cache that, by default, is updated every 24 hours. The data set cache can be configured so that users can manually update it for real-time reporting. The Data refresh status card in the Cost administration workspace shows when the cache was last updated.  |
| Cost management is a separate module in the navigation pane   | AX7     | Cost management | Cost management is introduced as a domain area. Cost-related configuration and insight were scattered throughout Inventory management, Production control, and Accounts Payable.  |
| The posting types that are related to inventory accounting and production accounting have been updated  | AX7     | Cost management | The labels have been updated so that labels on theInventPosting, Resource, ResourceGroup, andProductionGroup pages match the actualLedgerPostingType labels. All the labels have also been renamed so that the labels match the operational events. Note that the actual posting logic hasn't been changed.   |
| Import/export the purchase price, cost, or sales price from Microsoft Excel into or from a costing version  | AX7     | Cost management | The introduction of data entities makes it possible to implement an import/export feature. This feature lets users import/export prices or costs into a costing version. Import a full list of next year's purchase prices that is obtained from the Purchasing department. Push costs and standard sales prices from headquarters to one or more sales companies in one operation.   |
| Get a quick overview of the inventory balance and average unit cost of a cost object  | AX7     | Cost management | A new Cost object page is introduced. By default, this page shows all cost objects that are related to the product. The page shows the current inventory quantity, value, and average unit cost per cost object.  |
| A new Cost entriespage helps remove complexity during inventory control   | AX7     | Cost management | <p>The Cost entries page offers a new way to view inventory transactions. Transactions are shown in a chronological order.</p> <p>Only transactions that contribute to costs are included.</p> <p>There is no notion of physical costs or financial cost.</p> <p>There is no notion of physical quantity or financial quantity.</p> <p>The costs are added incrementally.</p>   |
| A new Production WIP statementdialog box gives cost controllers a summarized view of accumulated costs for a specific product   | AX7     | Cost management | The WIP statement shows a summarized WIP balance of the specific production order, grouped into appropriate cost classifications. A chart shows, in chronological order, how operational postings have affected the WIP balance.  |
| Use the View cost comparison feature that has been introduced on production orders. The feature makes it easier to compare costs that are related to a production order       | AX7     | Cost management | <p>The cost comparison feature lets cost controllers compare the following data:</p> <p>Active cost versus Estimated cost = Planning variance</p> <p>Estimated cost versus Realized cost = Production variance</p> <p>Planning variance + Production variance = Total variance</p> <p>This feature works independently of costing methods that are assigned to the produced item. By default, a chart shows the cost comparison by cost group type. The chart lets users drill into more detailed levels.</p>   |
| Create web-based solutions in the cloud that are accessible on many devices   | AX7     | Developer       | The current version of Dynamics AX is based on a new web-based client and client framework.   |
| Use Microsoft Visual Studio to develop your solutions   | AX7     | Developer       | Visual Studio is the only development environment.  |
| Compile Common Intermediate Language (CIL) for all features   | AX7     | Developer       | The brand-new X++ compiler generates CIL for all features. CIL is the same intermediate language that is used by other .NET-based languages.  |
| Embed business intelligence (BI) reports and visualizations in the Microsoft Dynamics AX client   | AX7     | Developer       | Create highly-intuitive and fluid visualizations.   |
| Integrate with Microsoft Office   | AX7     | Developer       | New capabilities include the Excel Data Connector app,Workbook Designer page, Export API, and Document management.  |
| Automate build, test, and deploy  | AX7     | Developer       | Deploy the Developer topology by using Developer and Build VM. Auto-configure Build VM to discover, build modules from Visual Studio Online (VSO), and run tests. C# and X++ module compilation and references are supported.   |
| Customize with overlayering and extensions  | AX7     | Developer       | The current version of Dynamics AX has a new customization model.   |



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| Build new controls and UI elements by using X++ and a modern web framework   | AX7 | Developer            | It's easier to build controls in the current version. The X++ framework can be used for application behavior and business logic, and an HTML/JavaScript-based client allows for modern visualizations.  |
| Evaluate and tune performance by using new tools   | AX7 | Developer            | PerfSDK, Data Expansion Toolkit, Trace Parser Web app, and PerfTimer are new.   |
| Expose updatable view by using Odata   | AX7 | Developer            | The current version of Dynamics AX introduces a public OData service endpoint that enables access to Dynamics AX data in a consistent way across a broad range of clients.  |
| Take advantage of the business connector to author business logic and support integration scenarios  | AX7 | Developer            | The business connector is no longer supported. The authoring requirement is provided by the fact that X++ is compiled into managed code. Therefore, interop is easier. The integration scenarios are met by using OData.  |
| Choose scale (that is, the number of decimal places) on real database fields and extended data types (EDTs)                                | AX7 | Developer            | EDTs and fields now have a scale property that can be applied to the individual field and EDT. The default is set to 6, not 16.   |
| Export account structures to Microsoft Excel   | AX7 | Financial management | You can now select an account structure and export it to Excel.   |
| View ledgers and advanced rule structures that are associated with an account structure on a single page                                   | AX7 | Financial management | FactBoxes have been added to the account structure page.  |
| View ledgers that are associated with a chart of accounts on a single page   | AX7 | Financial management | FactBoxes have been added to the Chart of accounts page.  |
| View closing sheet adjustments and closing transactions in separate columns on the Trial balance list page                                 | AX7 | Financial management | An additional parameter has been added to the Trial balance list page.  |
| Global general journal   | AX7 | Financial management | New Global general journal page to enter general journals. Privileges for this page are added to the Accountant role.   |
| Accounting source explorer   | AX7 | Financial management | New Accounting source explorer page and actions to navigate there from the Trial balance list page and the Voucher transactions page.   |
| Additional posting layers  | AX7 | Financial management | Ten posting layers are now available.   |
| View related intercompany voucher  | AX7 | Financial management | The Related voucher option is available for users to see the voucher in the offset company when posting intercompany transactions. From the related vouchers users can click on the details and quickly jump to the offset company voucher.   |
| Mass financial period close  | AX7 | Financial management | Users are able to update the module access and change the period status for multiple companies one time.  |
| Foreign exchange rates powered by Oanda  | AX7 | Financial management | If users have a key for Oanda they can enter it when configuring the exchange rate provider.  |
| Filter financial reports (Management Reporter) based on dimensions, attributes, dates, and scenarios                                       | AX7 | Financial management | Report options have been added, so that different filters can be applied when a user is viewing a report. A new report is then generated based on those filters.  |
| View financial reports (Management Reporter) within the Microsoft Dynamics AX client   | AX7 | Financial management | All financial reports can be accessed in the Dynamics AX client. The user selects a report to view, and the report is displayed in the client.  |
| Print financial reports (Management Reporter) from the Microsoft Dynamics AX client  | AX7 | Financial management | The user can choose the detail level and page setup for a report by using the Print option in the financial report in the Dynamics AX client.   |
| Analyze financial data by using the "Monitor financial performance" content pack for PowerBI   | AX7 | Financial management | On PowerBI.com, select Get Data, and then select the Dynamics AX – Financial performance content pack. Enter the URL for your Dynamics AX endpoint to see your data reflected in the dashboard.   |
| Track financial period closing processes   | AX7 | Financial management | Closing templates and schedules can be created by using the Financial period close configuration. Use the Financial period close workspace to track the progress of closing schedules across multiple companies.  |
| Monitor budget versus actuals, and create ledger forecasts by using the Ledger budgets and forecastsworkspace and additional inquiry forms | AX7 | Financial management | The workspace can be accessed through the Dynamics AX dashboard. It includes links to several new inquiry pages: Actuals vs. budget summary,Budget control statistic summary, Budget register entries, and Budget plans.  |
| Create layouts for budget plans and forecasts  | AX7 | Financial management | An unlimited number of layouts is available for budget plans and forecasts. You can combine selected financial dimensions, user-defined columns, and other row attributes (such as comments, projects, and assets) in the layout. Users can switch the layout for the budget plan document on the fly and edit data by using any selected layout. The configuration of budget planning is simplified by eliminating scenario constraints and using layouts to define which data can be viewed and edited in each stage of the budget plan document. |
| Print the Vendor Invoice Transactionsreport by using information from the Detailed Due Day List report, which includes the days past due   | AX7 | Financial management | The information on the two reports has been consolidated into the Vendor Invoice Transactions report. The Detailed Due Day List report was deprecated.  |

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| Generate regulatory reports directly in PDF format  | AX7 | Financial management     | The PDF format is the default format for regulatory reports.  |
| Run the sales tax settlement process as a batch process   | AX7 | Financial management     | On the Sales tax settlement period page, you can specify that the settlement process should be run in batch mode.   |
| Access the client any time, anywhere  | AX7 | Foundation               | The two AX 2012 clients have been replaced by a single, standards-based web client that provides the full set of functionality of the desktop client together with the reach of the Enterprise Portal client.   |
| Be productive by using the new Task recorder  | AX7 | Foundation               | The new Task recorder can be used directly from the web client. Access to Task recorder doesn't require admin privileges. Recorded steps can be viewed live as you record, new editing options have been introduced, and Task recorder supports more scenarios in addition to existing Business process modeler (BPM) scenarios.  |
| Help users better understand their upcoming work with workspaces  | AX7 | Foundation               | Workspaces are a new concept in Dynamics AX that are meant to replace role centers as the primary way to navigate to tasks and specific pages. They provide a one-page overview of a business activity and help users to understand the current status, the upcoming workload, and the performance of the process or user. Workspaces are more granular than AX 2012 role centers, and a user may have access to multiple workspaces.   |
| Make forms responsive to browser viewport or device size  | AX7 | Foundation               | With the shift to the web in the latest Dynamics AX, a form's dimensions are now based on the browser viewport size or device. Controls and layout parameters have been modified or added to better respond to changes in viewport size.  |
| Use patterns for an enhanced form development experience  | AX7 | Foundation               | In the current version of Dynamics AX, form patterns have been introduced. Form patterns represent a combination of form templates and the Form Style Checker tightly integrated into the development experience. Patterns have been defined at the form level (like AX 2012) with additional subpatterns now available at the group and tab page level.  |
| Access guided procedural Help (task guides) and conceptual topics by clicking Help  | AX7 | Help                     | The Help system in the current version of Dynamics AX displays task guides that are stored in Microsoft Dynamics Lifecycle Services (LCS) BPM. The Help system also displays topics from the Microsoft wiki. For more information, seeDynamics AX Help – Getting Started.   |
| Transfer skills and certificates to class participants upon course completion   | AX7 | Human capital management | When a course is completed, a new option becomes available to update a participant's records with the new skills and certificates.  |
| Quickly verify employment   | AX7 | Human capital management | Your HR department can quickly verify employment by using a workspace or the employee page.   |
| Let employees view, update, and delete information in the system  | AX7 | Human capital management | This feature is enabled, and lets employees and contractors view a wide range of personal data. Optionally, a workflow can be used when information is created, updated, or deleted.  |
| Let managers view or edit employee information  | AX7 | Human capital management | Depending on configuration settings and security, managers can view or edit employee information.   |
| Manager Self Service employment and position requests   | AX7 | Human capital management | Managers can now submit requests for new hires (employees and contractors), Transfers and Termination (ending employment). Managers can also request a new position, extend a positions duration, or request position changes.  |
| Access the results of compensation processing   | AX7 | Human capital management | Compensation processing results can now be accessed at any point after the process has been run.  |
| Access the results of benefit processing  | AX7 | Human capital management | Benefits processing results can now be accessed at any point after the process has been run.  |
| View “Date Effective” timeline changes.   | AX7 | Human capital management | This comparison tool is available for employees, positions, and jobs. It provides a comprehensive view of changes from one version of a record to another.  |
| View employees by company   | AX7 | Human capital management | Employee and contractor lists are automatically filtered by the company that you're logged on to.   |
| Update the course participants list   | AX7 | Human capital management | Course participants can be removed from the participants list.  |
| Manage compensation events in a group   | AX7 | Human capital management | This feature streamlines the processing of compensation changes for employees.  |
| Configure and generate electronic documents to meet the legal requirements in various countries/regions   | AX7 | Localization             | Generic Electronic Reporting (GER) is a new tool for configuring and generating electronic documents that target a business user instead of a developer. GER lets you set up data models that are domain-specific and independent of the Microsoft Dynamics AX database as data sources for document formats. A business user can configure the formats, based on these domain-specific data models (for example, for payments, Intrastat reports, or tax reports). The user configures the formats by using simple visual tools that are similar to Excel. GER currently supports the generation of electronic documents in text, XML, and Excel formats. These documents can be generated simultaneously and packed into zip files. Data models and formats support versioning. Format versions can have effective periods. Each data model or format version is stored in a separate configuration and distributed to partners and customers through LCS. Partners and customers can customize Microsoft data models and formats, or create their own. GER saves partner and customer configuration changes as deltas to Microsoft configurations, which simplifies upgrades to new versions of Microsoft configurations. By using LCS, partners can also share their data model and format configurations with other partners and customers, who can customize and share them . Delta customization and easy upgrade are supported through the whole customization chain. |
| Perform a check of material availability for production orders on a separate page that is opened from the Production floor management workspace | AX7 | Manufacturing            | The production supervisor can check whether materials for scheduled production orders are available on the required date. In the workspace, the production supervisor can see how many production orders are in the scheduled state and pending release. Based on the dynamic master plan, the information about material availability is updated if material requirements are met by on-hand inventory for actual orders or planned orders. Based on the information about material availability, the supervisor can release the orders on the Material availability page.   |
| Start and report progress on production jobs by using the new Job card device page  | AX7 | Manufacturing            | Although the new Job card device page is designed for simplicity, it's also designed for touch. The page fits well on mobile devices, such as tablets and phones. The shop floor worker will find less information overload and more intuitive ease of use. The worker can perform traditional tasks, such as starting, ending, and reporting progress on a job. Besides working on the actual job, or logging off and clocking out, the worker can view attachments, break for lunch, and perform other activities. Jobs are queued to the worker in a planned sequence, but they can also be picked by the worker. The page is primarily targeted at discrete manufacturing operations, where materials are prepared for production. For scenarios that are related to reporting of co-products and by-products, and materials picking by tracing dimensions, use the Job registration page.  |

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| Master planning can warn the user if a sales order or production order isn't ready for delivery by the scheduled date                             | AX7 | Master planning and forecasting | Futures messages and futures dates have been renamedcalculated delays and delayed dates, respectively.  |
| Gain quick insight into the status of a master planning run, urgent planned orders, and planned orders that cause delays                          | AX7 | Master planning and forecasting | The Master planning workspace offers at-a-glance information about when the last master planning run was completed, whether any errors occurred, what the urgent planned orders are, and which planned orders cause delays.   |
| Use Excel to update demand forecasts  | AX7 | Master planning and forecasting | You can take advantage of seamless integration with Excel when you enter demand forecasts, make updates, and delete demand forecasts.   |
| A set of tools lets you estimate future demand and create demand forecasts, based on historical transaction data                                  | AX7 | Master planning and forecasting | Estimate future demand by using the power and extensibility of a Microsoft Azure Machine Learning cloud service. It's easy to use and extend the forecast models in Machine Learning to meet customer requirements. The service performs best-match model selection and offers key performance indicators (KPIs) that can be used to calculate forecast accuracy.   |
| Optimize the order date and quantity, based on a visual overview of related actions from the master planning run                                  | AX7 | Master planning and forecasting | The actions chart provides a better overview. It includes options that let you show only applied actions and directly related actions. When actions are applied, they appear dimmed but are still shown. Therefore, the overview is retained. Additional information is added to the actions chart to display the data on one page.   |
| Use the Purchase order preparation workspace to gain quick insight into the status of purchase orders that are being prepared                     | AX7 | Procurement and sourcing        | The Purchase order preparation workspace provides an overview of orders from the time when they are created as a draft and traced, through workflow approval states, and onward toward confirmation.  |
| Use the Purchase order receipt and follow-upworkspace to gain quick insight into purchase orders that are pending receipt, to help with follow-up | AX7 | Procurement and sourcing        | The Purchase order receipt and follow-up workspace provides an overview of confirmed purchase orders that have pending receipts or shipments. The workspace includes lists of post-due receipts and pending receipts to help with proactive review and follow-up by the supplier. The workspace also lists purchase orders that arrival registration has occurred for in the warehouse, to help guarantee that the receipt is posted. Purchase order returns that haven't yet been shipped are also available for review. |
| Send purchase orders for confirmation to a vendor portal hosted in the Dynamics AX client. Let the vendor confirm or reject                       | AX7 | Procurement and sourcing        | The vendor portal interface allows vendors to receive purchase orders to be confirmed or rejected. It also allows the vendor to have an overview of all the confirmed purchase orders for an account.<br>The purchasing agent can send a purchase order requesting a confirmation from the vendor.<br>The vendor needs to be a registered Microsoft Azure Active Directory (Azure AD) user in Dynamics AX, a contact person for the vendor, and have a dedicated security role.   |
| Book workers as resources on projects   | AX7 | Projects                        | The Work center table where resources for manufacturing and production are stored can now be used to book workers as resources on a project.<br><br>The Category and product management workspace enables the following functionality:<br>Assortment management.<br>Assortment lifecycle tracking.<br>Released products management.<br>The Prices and discounts management workspace enables the following functionality:   |
| Perform merchandizing operations  | AX7 | Retail HQ                       | Price and discount management for a given channel and category.<br>Category price rule management.<br>Price and discount priorities, which let you assign priorities to price groups and discounts, so that you can control the order that they are applied in.<br>Affiliation and catalog discount management.<br>The Catalog management workspace enables the following functionality:<br><br>Summary of active catalogs.<br>Catalog lifecycle tracking in a single location.   |

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|  |     |                                   | <p>Channel deployment workspace lets you perform the following tasks:</p> <p>Create new channels and related entities.</p> <p>Track the progress of retail store configuration.</p> <p>Take the required steps to complete a task, or provide information to complete the task.</p> <p>Track the status of devices, and directly validate and download the Retail Modern POS (MPOS) program installation in stores.</p> <p>Access all related pages.</p> <p>Retail store management workspace lets you perform the following tasks:</p>   |
| Manage retail channel deployments and operations   | AX7 | Retail HQ                         | <p>Manage workers and the workers' point of sale (POS) permissions.</p> <p>Track shift status for a given store or group of stores.</p> <p>Directly validate and download the MPOS program installation in stores.</p> <p>Print reports and access related pages.</p> <p>Retail store financials workspace lets you perform the following tasks:</p>  |
| Manage retail IT operations  | AX7 | Retail HQ                         | <p>Create, calculate, and post statements for a given channel.</p> <p>Schedule batch jobs to update inventory, and calculate and post statements.</p> <p>Track open statements.</p> <p>Track shift status for a given store or group of stores.</p> <p>Print reports and quickly access all related pages.</p> <p>The Retail IT workspace enables Commerce Data Exchange inquiries in a single place for a given channel, so that you can perform the following tasks:</p> <p>Download sessions.</p> <p>Upload sessions.</p> <p>Track failed sessions, and re-initiate or run them again.</p> <p>View or run upcoming jobs.</p> |
| Import/export databy using data entities   | AX7 | Retail HQ                         | Retail data entities have been expanded to support all master and reference data that is related to retail. There is also enhanced support for data entities across the entire Dynamics AX solution.  |
| Perform intelligent analytics by using BI reports from Dynamics Microsoft AX and the POS client.             | AX7 | Retail HQ                         | More than 30 back-office reports and 10 channel-side reports are available.   |
| Analyze retail channel sales data by using the “Monitor Retail Channel performance” content pack for PowerBI | AX7 | Retail HQ                         | On PowerBI.com, select Get Data, and then select the Dynamics AX – Retail Channel performance content pack. Enter the URL for your Dynamics AX endpoint to see your data reflected in the dashboard.  |
| Configure consumer permissions   | AX7 | Retail HQ                         | Customers can choose whether POS operations can be available to consumers. Retail Server uses permissions for application programming interface (API) calls.  |
| Manage and validate entity configurations  | AX7 | Retail HQ                         | <p>The configuration manager and validator feature enables the following functionality:</p> <p>Bulk configuration data upload</p> <p>Business entity validation</p>   |
| Enable POS devices to connect to peripherals such as printers, cash drawers, or payment devices              | AX7 | Retail Hardware Station           | An added hardware profile supports more diverse hardware from one station to the next. A new Hardware Station profile supports a unique terminal ID for each Hardware Station when electronic funds transfer (EFT) transactions are processed. EFT support has been merged into hardware station to reduce the involvement of MPOS in EFT payment processing.   |
| Connect to a commerce runtime (CRT) database that stores business data for the channel by using CRT services | AX7 | Retail Server and data management | <p>OData V4 is supported.</p>   |
| Support Retail services as a hostable set of services  | AX7 | Retail Server and data management | <p>The E-commerce API is now available through Retail Server to support online scenarios.</p>   |
| Move data between the Microsoft Dynamics AX back office and channels by using Commerce Data Exchange         | AX7 | Retail Server and data management | <p>There is functional parity with Microsoft Dynamics AX 2012 CU8. However, note the following details:</p> <p>Commerce Data Exchange has been re-engineered for the cloud.</p> <p>Async service uses direct database access to the channel database.</p> <p>Commerce Data Exchange: Real-time Service is hosted as a Microsoft Dynamics AX custom service.</p> <p>MPOS manages synchronization between offline databases and Retail Server.</p>  |
| Support plug and play, semi-integrated cross-channel payment processing by using the payment SDK             | AX7 | Retail Server and data management | <p>The current version of Dynamics AX supports all existing Microsoft Dynamics AX for Retail 2012 credit/debit card features and four new enhancements.</p>   |
| Activate devices by using a Microsoft account (Microsoft Azure Active Directory (Azure AD))                  | AX7 | Retail Server and data management | <p>The following functionality is provided:</p> <p>Enhanced security by Azure AD-based activation for the cloud.</p> <p>Enhanced security for token management.</p> <p>Improved reliability, troubleshooting, and error messaging during activation</p> <p>Simplified IT administration tasks that are related to activation.</p> <p>Revisited threat model and fixed security issues.</p>  |

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| Manage rich media content for authoring and serving through Media Gallery  | AX7 | Retail Server and data management | <p>Support image upload, and also view, manage, and delete, from Media Gallery for both externally-hosted and Retail-hosted images.</p> <p>Support image upload and view from entity pages (Products, Catalogs, and so on) by linking an image from the gallery and uploading an image from the desktop.</p> <p>Optimize the images for thumbnail, custom size, and original.</p> <p>Bulk link entities by using a template and background jobs for bulk association.</p> <p>Microsoft Excel integration overwrites the attribute group limitation of naming conventions and predefined paths.</p> <p>Support offline images and secure images for personally identifiable information (PII) content, such as Retail-hosted employee and customer images</p>   |
| Search, browse, look up, or scan products, add products to a cart, accept payment, and check out by using an intuitive, touch-friendly, rich and immersive user experience on MPOS | AX7 | Rich clientele experience         | <p>Functional parity with AX 2012 MPOS is provided. This includes the following functionality:</p> <p>Customer lookup across stores/channels.</p> <p>The ability to create customer orders without accessing Real-time Service.</p> <p>Improved device activation workflows, status, and error messages.</p> <p>Extensibility improvements, such as pre-post triggers and activity support to improve customization.</p>   |
| Start POS as a web app via Cloud POS   | AX7 | Rich clientele experience         | <p>Functional parity with MPOS is provided. This includes the following functionality:</p> <p>Device activation by using AAD</p> <p>Responsive layout design</p> <p>Support for Internet Explorer and Edge browsers</p> <p>An e-Commerce platform is provided that supports third-party storefronts. The platform includes the following features:</p> <p>A rich consumer API.</p> <p>Authentication integration to any third-party open ID providers.</p> <p>Payment integration.</p>   |
| Integrate with content management systems to create an omni-channel e-Commerce website   | AX7 | Rich clientele experience         |  |
| Target customers via mail order catalogs, and streamline operations through fast order entry, assisted sales, and fulfillment by using Call Center                                 | AX7 | Rich clientele experience         | Feature parity with the AX 2012 Call Center solution is available, with the exception of price overrides.  |
| Use the Commerce essentials dashboard  | AX7 | Commerce essentials               | The Commerce essentials dashboard provides links to frequent tasks, including links to workspaces, the Power BI web control, favorites, recent pages, and current work items.  |
| Use data entities to access account changes  | AX7 | Commerce essentials               | Account changes are accessible through data entities.  |
| Use Cloud POS and MPOS   | AX7 | Commerce essentials               | MPOS and Cloud POS replace the EPOS client. The e-Commerce channel has also been added to Commerce essentials by default.  |
| Implement and maintain two-tier architecture   | AX7 | Commerce essentials               | Data entities created to enhance support for two-tier architecture.  |
| Simplify forms   | AX7 | Commerce essentials               | Form and menu extensions provide standardized UI simplification.   |
| Create and share task guides and documents for Modern POS  | AX7 | POS Task recorder                 | <p>The MPOS Task recorder supports the following features:</p> <p>Create task recordings for various tasks that are performed in MPOS.</p> <p>Generate a document that includes steps and screenshots, and associate it with a node in the business process model.</p> <p>Extensibility hooks are improved across the various components to better support code isolation and serviceability. Here are some of the features that are included:</p> <p>Workflow, activity, and operation.</p> <p>Pre-triggers and post-triggers that let you easily extend a workflow.</p> <p>Application and operation triggers.</p> <p>Additionally, a framework is available that lets you build and package these components by using MSBuild, and then seamlessly deploy your customization through Microsoft Dynamics Lifecycle Services (LCS).</p> <p>The following topologies can be deployed to the cloud:</p> <p>Retail one-box trial topology.</p> <p>Retail multi-box high-availability topology.</p> <p>Developer topology with the Retail SDK.</p> <p>There is an improved “low-touch” client component installation via self-service installation:</p> |
| Support an extensible and easily deployable Retail components across HQ, Call Center, e-Commerce, and the POS  | AX7 | Extensibility                     |  |
| Manage the program via cloud deployment services   | AX7 | Lifecycle management              | <p>Retail Modern POS.</p> <p>Retail Hardware Station.</p> <p>Support for the upload and distribution of customized packages through self-service installation.</p>   |
| Monitor the health of the system, and diagnose errors and issues   | AX7 | Lifecycle management              | Monitoring and diagnostics for Retail components is now available through the Operational Insightsdashboard in LCS.  |
| Create, configure, download, and install Retail Hardware Station and devices by using self-service   | AX7 | Lifecycle management              | Because there are only two installation packages, one for the MPOS client and the other for the Retail Hardware Station component, self-service has reduced the amount of work that is required at every level to install these client components.   |
| Get a quick overview of delivery alternatives when you promise orders to customers   | AX7 | Sales                             | <p>Based on the existing algorithms for delivery date calculation, the Delivery alternatives page offers a new user experience for order promising:</p> <p>It consolidates relevant information from multiple forms into one space.</p> <p>It offers “ready-made” alternative delivery packages, such as a combination site/warehouse/variant/transport mode, based on the fastest delivery (earliest available date) criterion that the user can choose from.</p> <p>It lets the user select options from the simulation interface and transfer them to the sales order line.</p>   |
| Download, install, and configure the Warehouse Mobile Devices portal   | AX7 | Warehouse management              | You can download a stand-alone installer through a menu item in Warehouse management. It’s designed for self-driven on-premises deployment and configuration.  |

