What's new in Microsoft Dynamics AX 2012 R3

New Functionality Name	AX Version In Which This Feature Was Introduced	AX Module Name	New Functionality Description
Create one or more one-time vendor accounts at the same time as you create invoices for those vendors	2012 R3	Accounts payable	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 source document added for planned purchasing	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.
General budget reservation workflow	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.
Project accounting	2012 R3	Budgeting	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).
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. 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. 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): ○ Define and view eligibility and benefit limits for your organization. ○ Set up case security. ○ Create and manage FMLA cases. ○ Run reports.
Changes to the Forecast positions area	2012 R3	Human resources	○ 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. ○ You can copy a forecast position with its attributes, including its cost elements, to a different budget planning scenario. ○ 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. ○ 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. ○ 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.
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.

Feature	Version	Module	Description
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. 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.
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: ○ To define stocking limits. ○ To configure work confirmation and bar code scanning on mobile devices. ○ To create replenishment templates. ○ To set up rules for converting units of measure. ○ To assign fixed warehouse locations.
Use additional production processes in a warehouse	2012 R3	Warehouse management	It's now possible to use the following production processes in a warehouse: ○ Deliver picked materials to the exact locations where the materials are consumed in production. ○ 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. ○ 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.)
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: ○ The FEFO batch reservation strategy now takes the Best before date and the Expiration date of the batches into account. ○ It is now possible to reserve items across different batch numbers when releasing sales orders.
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.
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	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. ○ At the aggregate level, the report compares the total aggregated cost per item, item variant, and site. ○ At the cost rollup level, the report compares the cost rollup for each cost group per item, item variant, and site.
BOM journal posting	2012 R3	Inventory management	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.
Inventory aging report	2012 R3	Inventory management	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.
Rating	2012 R3	Transportation 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.
Routing	2012 R3	Transportation 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.
Transportation engines	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.
Freight reconciliation	2012 R3	Transportation management	Use an automatic or a manual process to reconcile freight bills with invoices.
Appointment scheduling	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.
Improvements to the Bill of Lading	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.
Printing multiple packing slips in the Load planning workbench	2012 R3	Transportation management	It is now possible to print multiple packing slips directly from the load planning workbench by selecting multiple loads.
Enabling freight reconciliation	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.

Demand forecasting	2012 R3	Master planning	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: ○ Complete the prerequisite setup tasks before you can use demand forecasting. ○ Create a baseline forecast from historical demand data that is gathered and loaded in a Microsoft SQL Server Analysis Services cube. ○ 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. ○ Import a demand forecast to Microsoft Dynamics AX so specific companies and forecast models can use the forecast data as input to master planning.
Forecast reduction for a customer or customer group	2012 R3	Master planning	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. ○ 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. ○ 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. The Include customer forecast in the demand forecast check box is located in the Coverage groups form.
Start time for production scheduling	2012 R3	Master planning	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. The Scheduling start time field is located in the Master planning parameters form.
Enhanced functionality for customer rebate agreements	2012 R3	Process manufacturing production and logistics	New options have been added to the customer rebate agreement form for item selection, cumulation, and line breaks.
Setting a request for quotation expiration date and time	2012 R3	Procurement and sourcing	You can specify an expiration date and time on a request for quotation (RFQ) so that bids are received in a timely manner.
Specifying a sealed bidding process	2012 R3	Procurement and sourcing	You can specify that bids (replies to an RFQ) are sealed until the solicitation closing date. They are hidden until bid tabulation starts.
Creating scoring methods and criteria so that you can score bids	2012 R3	Procurement and sourcing	You can define sets of scoring criteria and scoring methods that will be used for evaluating bids (RFQ replies).
Creating custom solicitation types	2012 R3	Procurement and sourcing	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.
Authorizing alternate or substitute items in bids	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.
Assign numbers to lines in an RFQ	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.
Automatically add vendors to an RFQ	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 a questionnaire for vendors	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.
Amending an RFQ or attaching documents after sending it	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.
Ranking received bids	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.
Placing a purchase requisition on hold	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.
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	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.
Modify project transactions in an invoice proposal	2012 R3	Project management and accounting	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.
Access additional views of project budget balances	2012 R3	Project management and accounting	In the Project budget balances form, you can view summaries of project budget balances according to the following criteria: ○ Transaction type ○ Category group ○ Cost template ○ Category
Enhancements to tools for scheduling worker resources	2012 R3	Project management and accounting	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: ○ 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. ○ You can schedule workers on an activity for a specific number of hours. ○ You can convert selected soft-booked hours to hard-booked hours directly from the project team. ○ The concept of reserving workers has been renamed booking workers.
Integrate Microsoft Exchange Server with Microsoft Dynamics AX	2012 R3	Sales and marketing	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.
View information about discount transactions	2012 R3	Retail	You can now view detailed information about discount transactions. This information is available from the following locations: ○ A command in the Retail store transactions form ○ A command in the Transactions form ○ The Business Intelligence (BI) cube.
More flexible retail discounts	2012 R3	Retail	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.
Create return locations	2012 R3	Retail	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.
Category-based pricing	2012 R3	Retail	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.
Create and maintain product kits	2012 R3	Retail	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. 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. 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. When assembly or disassembly orders are created and processed, bill of materials (BOM) journals are generated to create the required inventory transactions.
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.
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. 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.
Additional item information	2012 R3	Call center	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: ○ You can specify which individual customers and products are eligible for installment billing. ○ Installment billing can use "on account" payment. ○ You can associate a payment schedule with a catalog.
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: ○ Payments ○ Picking and packing ○ Delivery ○ Invoicing ○ Holds ○ Backorders ○ Returns
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.
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	Use the following new customer service features in a call center: ○ Import a file that indicates duplicate customers. ○ Import lists of business relations or business prospects. ○ Import a change-of-address file. You can inactivate invalid addresses and update addresses. ○ Use the new customer service form to perform the following tasks: - Search for customers by keyword, telephone number, sales order, or customer account number. You can use wildcard characters in customer searches. - View detailed customer information, such as contact information, notes, sales order lines, and events. - Track and fulfill customer requests for catalogs.
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.