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SOLUTIONS

Microsoft Dynamics AX 4.0 Quick Reference Guide

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Microsoft Dynamics AX 4.0

Quick Reference Guide

Microsoft Dynamics™ AX is an integrated, adaptable business management solution for midsize and larger companies that can help people make informed business decisions with confidence. Microsoft Dynamics AX works like and with familiar Microsoft software such as the Microsoft® Office system. With less of a learning curve, people can get up and running quickly and focus on what's most important. Microsoft Dynamics AX can easily work with the systems companies already have in place. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics AX brings people, processes, and information together wherever they are located around the globe, increasing business productivity and effectiveness and helping employees drive business success.

Built on a proven foundation of advanced technology, Microsoft Dynamics AX helps customers seize global business opportunities with support for high transaction rates and hundreds or thousands of users across multiple sites. It also includes support for local languages, currencies, and legal requirements for more than 30 countries. The solution is delivered through a worldwide network of channel partners that provide specialized services and local support tailored to your unique needs.



How to Use This Document

This Quick Reference Guide is designed to be used by sales and non-technical staff in Microsoft Certified Partner organizations. It is intended for you to use as a tool to familiarize yourself with the full scope of the solution and to help describe specific modules and functionality to customers. It is written in the second person (the subject is “you”) to make it easy to transform the text into customer-ready statements.

The order of the modules and functionality in this document follows the Microsoft Dynamics AX price list. As such, partners may find it helpful to use this document together with the price list when working with customers to determine their business requirements for a Microsoft Dynamics AX solution. Note that while Business Ready Licensing groups many modules into Business Essentials, Advanced Management, Advanced Management Enterprise, and some additional components, this guide will describe each functional module or component of Microsoft Dynamics AX separately. Prerequisites for each module are also described in terms of individual modules rather than by pricing edition. This additional detail will help you understand the capabilities of the modules and components more deeply.

This guide will be revised regularly as new product information becomes available. You can find the latest information about Microsoft Dynamics AX, including any amendments to the information in this guide, on PartnerSource at <https://mbs.microsoft.com/partnersource/products/axapta>.

Table of Contents

Business Essentials

FOUNDATION PACK

Microsoft Dynamics AX Base Package and Database	2
Alerts	4

FINANCIAL MANAGEMENT

Financials I	5
Financials II	6
Fixed Assets	7
Three Company Accounts	7
Unlimited Virtual Companies	7
Dimensions	8
Unlimited Company Accounts	9
Domains (Group of Companies)	10

SUPPLY CHAIN MANAGEMENT

Trade	11
Trade Agreements	12
RFID	12
Logistics	13
Languages in Microsoft Dynamics AX	16

CONFIGURATION AND DEVELOPMENT

BUS Layer Runtime	17
MorphX Development Suite for Microsoft Windows	17
VAR Layer Runtime	19

OTHER BUSINESS ESSENTIALS FUNCTIONALITY

Database Log	19
Electronic Banking	20
Application Object Server	20
Record Level Security	21

Advanced Management

Business Analysis	24
Microsoft Dynamics CRM Server	25

SUPPLY CHAIN MANAGEMENT

Warehouse Management I	25
------------------------	----

MANUFACTURING

Resources	26
Production I	26
Master Planning	27

PROJECT MANAGEMENT

Project I	28
-----------	----

CUSTOMER RELATIONSHIP MANAGEMENT

Marketing Automation	30
Telemarketing	31
Sales Force Automation	32
Sales Management	33

Advanced Management Enterprise

FINANCIAL MANAGEMENT

Cost Accounting I (Cost Center Accounting)	36
Cost Accounting II (Open Dimensions)	37
Cost Accounting III (Internal Cost Accounting)	37
Cost Accounting IV (Flexible Planned Cost)	37

SUPPLY CHAIN MANAGEMENT

Intercompany	38
Warehouse Management II (Inventory Dimension)	40

MANUFACTURING	41	Product Builder for Enterprise Portal	59
Demand Planner	41	Performance Management for Enterprise Portal	60
Production II (Routing Management)	42	Enterprise Portal Web Users	60
Production III (Shop Management)	43	Application Integration Framework	61
Product Builder I (Product Configuration)	44	Web Services	62
Product Builder II (Routing Builder)	45	Shop Floor Control for Enterprise Portal	62
Product Builder III (Validation Types)	45		
Product Builder IV (Advanced Product Building)	46	CONFIGURATION AND DEVELOPMENT	63
Shop Floor Control I (Time and Attendance)	47	Web MorphX Development Suite	63
Shop Floor Employee Records	47		
Shop Floor Control II (Job Registration)	48	OTHER ADVANCEMENT MANAGEMENT ENTERPRISE FUNCTIONALITY	63
Shop Floor Control III (Payroll Generating)	49	Balanced Scorecard	63
		Business Process Management	65
PROJECT MANAGEMENT	50	Questionnaire I	66
Project II	50	Questionnaire II	67
CUSTOMER RELATIONSHIP MANAGEMENT	51	Additional Components for Business Essentials and Advanced Management	69
Service Management	51	Human Resource Management I	70
Service Subscription	52	Human Resource Management II	71
		HRM Employee Records (More)	72
HUMAN RESOURCE MANAGEMENT	53	Microsoft Dynamics AX Business Connector	73
Human Resource Management III	53	X++ Source Code	74
		Microsoft SQL Server Runtime	75
WORKSPACE COLLABORATION	54		
Microsoft Dynamics Client for Microsoft Office and SharePoint Server	54		
Enterprise Portal Framework	56		
Employee Role	57		
Sales Representative Role	57		
Customer Role	57		
Vendor Role	58		
Consultant Role	58		
Questionnaire for Enterprise Portal	59		
Human Resource Management for Enterprise Portal	59		



Business Essentials

The Business Essentials edition is an integrated, powerful financial and supply chain management solution designed for companies that need a core financial management and trade solution that will easily scale as their business grows. This edition is streamlined for easy installation, rapid user adoption, and an attractive price.

Foundation Pack

MICROSOFT DYNAMICS AX BASE PACKAGE AND DATABASE

The Microsoft Dynamics AX Base Package provides a foundation of:

- One user
- Three company accounts
- Three financial dimensions
- Unlimited virtual companies
- One specific language
- Security and user management capabilities
- Menu and form designer with IntelliMorph® technology
- One Microsoft Dynamics AX Object Server (AOS)

One User

One user is provided with the Base Package at no additional cost. Additional users can be licensed.

Company Accounts and Virtual Companies

The Microsoft Dynamics AX Base Package includes three accounts:

- Two company accounts.
- One DAT account, which is like the first two company accounts, but that cannot be renamed or deleted. The DAT account can be thought of as a company data account, which contains all the business information that will be used by the Microsoft Dynamics AX solution.

You can also include any table in a “virtual company.” By doing this, you can set any number of other company data accounts to share the data in the virtual company. For example, you can place a currency exchange rate table in a virtual company and share exchange rate data with any number of other company data accounts. You can share

inventory across multiple companies or decide to handle the invoices of multiple companies with one shared account. Any changes in the table in the virtual company will be reflected in all the other company data accounts that share that company's data. You can have any number of tables in a given virtual company, and you can have any number of virtual companies in a single database instance.

Languages

The Microsoft Dynamics AX Base Package includes any single language, which can be used in the user interface, online help, forms, reports and menus, printed reports, invoices, purchase and sales orders, and other business documents, as well as interfaces for Enterprise Portal in Microsoft Dynamics AX. Additional languages can be licensed (see Languages in Microsoft Dynamics AX). Microsoft Dynamics AX also supports double byte character technology.

System Configuration

All of the functionality of Microsoft Dynamics AX is installed when you perform the initial implementation, regardless of which modules you have chosen to license. When you first implement the solution, you will get a series of license keys, based on the modules you have licensed. Each license key opens a set of system and user configuration options, and you can choose the specific functionality you need by simply turning on the appropriate configuration options. Any functionality you don't need to license remains hidden until the moment you need to unlock it. Just enter the license key for the new functionality, and it will appear throughout the system.

The simple configuration architecture of Microsoft Dynamics AX leads to faster implementation, lower implementation and maintenance costs, lower upgrade costs, and a lower total cost of ownership (TCO).

Database

Microsoft Dynamics AX requires a database for data storage. Your company's business information is stored in a single database. The simplicity of this all-in-one architecture can result in easier maintenance and upgrades and lower TCO. By using a single database, the solution eliminates the need for database synchronization and reduces the risk of data corruption.

The Microsoft Dynamics AX solution handles interactions with the database, including operations like creating indexes, sorting, and table synchronization.

Microsoft Dynamics AX 4.0 SP1 works with Microsoft SQL Server™ 2005, Microsoft SQL Server 2000, and the Oracle Database 10g.



ALERTS

Alerts in Microsoft Dynamics AX helps people across your organization quickly and easily create alert rules that deliver automatic notifications of changes and events that are critical to their jobs. For example, they can receive notification when a customer record has been created or deleted, when a purchase order has been open for more than a certain number of days, or when a job is marked as complete.

Alerts

- User-specific configuration
- Intuitive, easy rules setup
- Monitoring by predefined dates, including the number of days before an event occurs, the specific date it occurs, or the number of days after the event occurs
- Monitoring by changes to records, specific fields, or set value
- Conditions filtering so that alerts appear only when certain conditions are met, such as when a purchase order is created for a particular vendor group
- Flexible delivery through a dedicated View Alerts inbox, pop-up windows in Microsoft Dynamics AX, or as e-mail messages in Microsoft Office Outlook®
- Fast access to Alerts detail, including when the alert occurred, the reason for the alert, and the before and after values of a change
- Create alert rule templates based on specific needs and define an HTML or Extensible Stylesheet Language Transformation (XSLT) to merge alert data into an e-mail message
- Integration with Outlook with drilldown to Microsoft Dynamics AX
- Remote access capabilities using Enterprise Portal

Benefit statement:

Microsoft Dynamics AX helps drive workflow efficiency by providing a fast and easy way for people to set up alerts that help ensure they get the information they need, when they need it, to maintain control over important business matters.

Key questions:

- Do you need a fast, easy way to monitor changes and events in your operations?
- Could your people maintain tighter control over business activity by monitoring the conditions, changes to, and status of certain business priorities?

Prerequisite:

Base Package

Financial Management

FINANCIALS I

Financials I in Microsoft Dynamics AX includes basic functionality such as general ledger, bank management, accounts receivable, and accounts payable. This module is a prerequisite for more advanced Microsoft Dynamics AX modules and features.

General Ledger 1

- Manage flexible accounting periods and use a reliable year-end procedure including a closing sheet
- Multiple configurable journals with approval capability
- Recurring journals
- Extensive posting control system, including validation prior to posting
- Handle multicurrency and exchange adjustment
- Multiple structured budget
- Extensive, flexible tax module feature for different types of calculation and reporting
- Advanced financial statement including alternative rows
- Dimensions enable you to slice your data different ways for more flexible analysis, while reducing the complexity of your chart of accounts
- Allocation based on percentages for accounts

Bank Management

- Bank account reconciliation, including electronic bank account statement import (for selected countries)
- Check setup
- Monitoring deposits, payments, drafts, and bank balances
- Electronic import of bank account statements (available for selected countries)

Accounts Receivable

- Monitor credit checks
- Flexible terms of payment, including advanced payment schedules and cash discounts
- Prepayment capabilities
- Draft handling (bill of exchange)
- Payment proposal feature with flexible payment method
- Free text invoicing (non-inventory item invoicing)
- Advanced collection letter and interest calculation
- Payment journal with payment proposal features
- Multiple currency handling and exchange rate adjustment
- Export and import formats for electronic payments

Accounts Payable

- Bridging accounts
- Flexible terms of payment, including advanced payment schedules and cash discounts
- Prepayment capability
- Promissory note handling
- Payment proposal feature with flexible payment method
- Multiple invoice entry options, such as separate handling of approved and unapproved invoices, and matching invoices to physical deliveries
- Payment journal with payment proposal features

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- Multiple currency handling and exchange rate adjustment
 - Export and import formats for electronic payments

Benefit statement:

Financials I gives you an inexpensive, fast, and efficient way to register financial transactions originating from accounts payable, accounts receivable, and the general ledger.

Key question:

Do your employees spend too much time processing financial transactions and maintaining journals and accounts in the general ledger manually?

Prerequisite:

Base Package

FINANCIALS II

Financials II in Microsoft Dynamics AX includes intercompany accounting, multiple company consolidation capabilities, account allocations, and cash flow forecasting and currency requirements projections. Financials II helps companies foresee future cash requirements and define automatic allocations to dimensions based on predefined settings.

Advanced General Ledger

- Book transactions across companies with intercompany accounting functionality
- Project future transactions based on commitments using cash flow forecasting and currency requirement calculation
- Consolidate financials for multiple companies either online or through data exports and imports between companies
- Redistribute amounts automatically, according to predefined setups of accounts, dimensions, and percentages
- Control and constrain financial dimensions combination

Benefit statement:

The advanced general ledger features in Financials II help you manage relationships between subsidiaries and the parent company. You can make transactions directly in a related company, which can help minimize workload. Financials II also enables you to make cash flow forecasts, so you can easily anticipate cash requirements and liquidity.

Key questions:

- Does your company spend a large amount of resources on manually tracking subsidiary operations or separate business groups, plants, or offices in the general ledger?
- Are you maintaining multiple separate general ledgers or, even worse, multiple system architectures across your company?
- Are you sometimes unable to anticipate future cash requirements?

Prerequisite: Financials I

FIXED ASSETS

Fixed Assets in Microsoft Dynamics AX uses asset budgeting and multiple depreciation models to track the status of your company's fixed assets. Integration with other parts of Microsoft Dynamics AX means you can order and receive fixed assets through purchase orders and inventory.

Fixed Assets Management

- Manage the full life cycle from acquisition to depreciation and disposition
- Projects can be transferred as fixed assets for capitalization and depreciation purposes
- Maintain asset status information
- Improve control over fixed assets to drive accuracy and timeliness in your accounting results
- Multiple depreciation models
- Forecasts using fixed-asset budgets
- Integrated to purchasing and inventory functionality
- Barcode handling

Benefit statement:

Fixed Assets helps customers manage the entire life cycle of their fixed assets, from acquisition to resale or write-off.

Key questions:

- Do you spend too much time tracking the status of your fixed assets in the general ledger and elsewhere?
- Are you maintaining multiple sets of fixed asset data?

Prerequisite:

Financials I

THREE COMPANY ACCOUNTS

The Microsoft Dynamics AX Base Package includes three accounts:

- Two company accounts.
- One DAT account, which is like the first two company accounts, but that cannot be renamed or deleted. The DAT account can be thought of as a company data account, which contains all the business information that will be used by the Microsoft Dynamics AX solution.

Prerequisite: Base Package

UNLIMITED VIRTUAL COMPANIES

You can include any table in a "virtual company." By doing this, you can set any number of other company data accounts to share the data in the virtual company. For example, you can place a currency exchange rate table in a virtual company, and share exchange rate data with any number of other company data accounts. You can share inventory across multiple companies or decide to handle the invoices of multiple companies with one shared account. Any changes in the table in the virtual company will be reflected in all the other company data accounts that share that company's data. You can have any number of tables in a given virtual company, and you can have any number of virtual companies in a single database instance.

Prerequisite: Base Package

DIMENSIONS

Dimensions help you analyze and classify financial transactions. Financial transactions are usually organized according to sub-ledger and account number. With Microsoft Dynamics AX, you can group transactions together by assigning additional dimensions to each transaction. A dimension can represent a cost center, region, customer type, transaction type, or any category by which you want to classify your transactions. There are three default dimensions:

- Department
- Cost center
- Purpose

You can license additional dimensions to increase the level of detail at which you can analyze your financial data, or to introduce new perspectives from which to look at your financial data. Note that all functionality associated with Dimensions is available with the Microsoft Dynamics AX Base Package. The extra dimensions license key just increases the number of dimensions that can be created.

Dimension settings can be customized by increasing or decreasing the number of dimensions tracked by Microsoft Dynamics AX. For example, the dimensions "phone sales" and "Internet sales" can be applied to sales data to give business leaders more information about their sales figures and results. Microsoft Dynamics AX also uses hierarchal dimensions, with each dimension having additional dimensions at multiple levels. The dimensions in a hierarchy retain the properties of the parent dimension.

Dimensions

- Dimensions values are applied and stored at the transaction level
- Data can be aggregated by dimensions when running reports and inquiries
- OLAP cubes use dimensions to analyze business data even further
- Rules can be set on accounts to control postings to the general ledger, according to the dimensions applied
- Default dimensions can be set on base data, such as ledger accounts and customer accounts
- Dimension hierarchies can be set up to control the posting of dimensions

Benefit statement:

Dimensions help you analyze your company's financial data from different perspectives, so you can improve how effectively you track figures across accounts. The extra detail embedded in your data gives you a powerful tool for analyzing your business information and transforming the raw data into actionable knowledge.

Key question:

Can you analyze and classify your company's financial transactions on more than three axes in order to get detailed breakdowns of your figures and business data?

Prerequisite:

Base Package

UNLIMITED COMPANY ACCOUNTS

The Microsoft Dynamics AX Base Package comes with three company accounts:

- A demo account, which can be used for testing and training purposes (note that testing can also be performed safely by duplicating the application and database)
- A DAT account, which is used to store non-company-specific data such as user permissions
- A company data account, which contains all the business information that will be used by the Microsoft Dynamics AX solution

Each additional company account enables you to host a separate set of data for each of your business units or clients. When a transaction is made in one company account, it will not affect the data in any other company account. Also, multiple company accounts enable customers to build a separate data set for each of their business groups, plants, or offices.

Even though the data in each company account is kept separate from other company accounts, it is possible for different accounts to share data tables, such as ZIP codes, exchange rates, or customer and vendor data. This reduces the amount of redundant data that needs to be stored. If desired, transactions can also be made between company accounts.

Data Storage and Security

- Company accounts enable separate data sets to be stored within the same database
- Separate company accounts can be modified independently—transactions in one account do not affect the data in separate accounts
- Domains support user access to multiple company accounts (see Domains on the following page)

Benefit statement:

Separate company accounts let you divide up your business data to support separate business groups in your company. You can also use company accounts to host sets of data for other companies. With company accounts, Microsoft Dynamics AX can store unique data sets in one installation and enable those separate sets to interact with common tables. This maintains the data integrity of each account and can reduce TCO for your company.

Key questions:

- How do you host separate client accounts?
- How do you build and work with separate data sets for different internal business groups, plants, or offices?

Prerequisite:

Base Package

DOMAINS (GROUP OF COMPANIES)

Separate company accounts can be grouped together into domains. Domains in Microsoft Dynamics AX helps you define user groups whose members have the same permissions in a number of different company accounts. The permissions of any given user group can be set uniquely for different domains. A single set of company accounts can belong to several domains.

Benefit statement:

Using Domains in Microsoft Dynamics AX enables you to set up user permissions for Microsoft Dynamics AX implementations that have many company accounts. With Domains, you can set up different access rights by company accounts.

Key question:

Do your company's administrators need to set up company-specific user permissions?

Prerequisites:

Financials I and Company Accounts



Supply Chain Management

TRADE

Trade in Microsoft Dynamics AX helps automate the entire sales process. When you enter sales orders, the system automatically checks credit limits, customer account information, and inventory levels so you can give your customers real-time information. You can print, fax, e-mail, or (with Enterprise Portal) publish order confirmations on the Web. You can also offer your customers flexible invoicing options, keep track of backorders, and manage returned items. You can track backlogs of all purchase orders. Depending on the status of the purchase order, you can allocate required items to sales orders.

Trade

- Initiate purchase orders from production orders, sales orders, or inventory coverage rules
- Create purchase orders with direct link to sales orders to support just-in-time purchase
- Flexible and comprehensive price calculations for increased accuracy and customer service
- Quick entry of order lines
- Add miscellaneous charges to item costs and sales/purchase prices
- Launch e-mail messages to confirm orders from within Microsoft Dynamics AX
- Real-time conversion of currency on open orders
- Compare costs against revenue
- Create credit notes from invoice journals
- Printing of cash on delivery (COD) documents when invoicing and follow up on outstanding CODs
- Easy reconciliation of inventory values versus ledger transactions for revision purposes
- Support for direct delivery
- Automatically convert purchase units into inventory handling units, or convert inventory handling units into sales units
- Print backorder information on delivery documentation and invoices
- Automatically substitute unavailable items with alternate items
- Notification of partial deliveries and remainders on sales order documents
- Specify acceptance parameters for over- or under-delivery
- Costing methods: first in/first out (FIFO), last in/first out (LIFO), standard cost, and weighted average
- Use tag counting and transfer to counting journal

Benefit statement:

Trade helps you deliver strong, consistent customer service, and helps reduce costs by automating and optimizing your sales and purchasing processes.

Key questions:

- Are you still using manual processes to track your orders and backorders?
- How fast can you get an overview of all your open orders?
- Can you quickly share your open orders with production and purchasing to speed up your supply chain and deliver to customers on time?

Prerequisite:

Financials I

TRADE AGREEMENTS

Trade Agreements in Microsoft Dynamics AX helps you set up detailed price agreements with your customers and vendors, including customer, vendor, or item-specific pricing and discounts. You can also automatically retrieve prices and discounts when entering orders and assign active "from" and "to" dates to prices for both items and customers.

Trade Agreements

- Set up price, discount, multi-line discount, and total discount on customers, vendors, and items, as well as groups of these
- Set up prices and discounts in all currencies
- Set up future prices and discounts without affecting current setup
- Automatically retrieve prices and discounts when entering orders
- Automatically calculate multi-line and total discounts on orders

Benefit statement:

Trade Agreements in Microsoft Dynamics AX helps you increase the speed of order entry and helps ensure correct pricing in sales and purchasing transactions. The module makes it easier to work with complex price and discount structures, because the system can automatically give your employees the correct price based on the details of each transaction. You can also easily maintain your price and discount structures by changing the prices and discounts of your items in batches.

Key question:

Can you easily keep track of all your price agreements with your customers and vendors?

Prerequisite:

Trade

RFID

As part of its supply chain management functionality, Microsoft Dynamics AX supports radio frequency identification (RFID) technology to identify and tag individual items. By improving your insight into your inventory and warehouse management tools, you can be better equipped to increase customer satisfaction and reduce your costs.

- Read and write to RFID-EPC (radio frequency identification-electronic product code) tags
- Register pallets and inventory items and control them throughout the supply chain
- Interface with RFID devices through Microsoft BizTalk® Server
- Overview of the entire RFID environment
- Possibility to create business processes to automate

Benefit statement:

RFID functionality helps customers manage and live up to regulatory compliance, through the ability to read and write RFID-EPC tags and by executing business processes automatically.

Key questions:

- Are your customers demanding that you comply with new policies in terms of tagging item/cases or pallets?
- Do you need a very detailed handling of specific items in your warehouse?

Prerequisite:

Microsoft BizTalk RFID

Note that Microsoft BizTalk RFID is not yet available as of June 2007. Please check PartnerSource at <https://mbs.microsoft.com/partnersource/products/axapta> for the latest information about Microsoft Dynamics AX.

LOGISTICS

Logistics in Microsoft Dynamics AX helps you simplify your entire logistics process. You can track inventory in detail with item and storage dimensions. Quarantine management enables you to set apart items that need to go through quality control. Barcode functionality empowers your point of sale system and warehouse to track items and locations electronically. The module also contains a flexible and robust bill of materials (BOM) designer.

Forecasting

- Enter and edit sales and purchase forecasts
- Use item and period allocation keys to allocate forecasts to individual items and time periods
- Consolidate sales and purchase forecasts into one inventory forecast

Item Dimensions

- Describe any item using up to three item dimensions: configuration, size, and color
- Rename the size and color dimensions to suit your specific business needs
- Maintain valid combinations of item dimensions—can be allocated manually or automatically
- Specify the number of item dimensions used per group of items
- Set up specific prices and discounts per item dimension combination

Storage Dimensions

- Describe storage by individual warehouse
- Track items using the serial and batch number dimensions

Advanced On-Hand Tracking

- Get an overview of current on-hand inventory per warehouse
- Drill down to the current on-hand situation by looking at any item or storage dimension or combination of dimensions
- Tools for tracking batch and serial numbers throughout the system

Quarantine Management

- Set aside items in quarantine using quarantine orders, either manually or automatically, when receiving items
- Look up quarantine inventory at any stage in the quality control process

ABC Analysis

- Calculate the ABC analysis based on revenue, cost, margin, and carrying costs, or with user-defined limits
- Calculate the ABC analysis based on revenue, cost value, margin, and carrying costs

Bills of Material (BOM) Management

- Maintain multiple barcodes per item
- Maintain multi-level BOMs, with version and date control of multiple BOMs
- Approval routing
- Formulas for calculation of variable or constant consumption
- Support phantom BOMs
- Variance configurator
- Make allowances for scrap in the consumption calculation
- Where-used feature
- BOM explosion for materials planning and pricing calculation on all BOM levels
- Dependent BOM versions

Placement and Storage

- Specify different location and storage policies at both the warehouse level and the item level
- Specify warehouse locations on five levels: warehouse, aisle, rack, shelf, bin
- Improve accuracy with RFID capabilities (See RFID section on previous page)

Graphical BOM Designer

- Graphical suite for designing and maintaining BOMs and gaining insight into existing BOMs, based on Microsoft drag-and-drop functionality
- All levels and sub-levels of the BOM are visible in a graphical tree structure
- Drag items from the inventory table to the BOM
- Drag items from the BOM to the route operations
- Circulation check to control which functions can be performed on certain BOMs
- System alerts notify when a BOM is active and should not be modified
- Simplified item configuration and configuration possibilities on all levels of the BOM

Inventory Dimensions

Eight different dimensions to specify exact location of items in inventory identification of:

- Physical location: warehouse and location
- Physical location: warehouse, location, and pallets
- Item origin: serial number and batch number
- Characteristics: configuration, size, and color

Barcode Support

- Maintain multiple barcodes per item
- Read and write the following four different types of barcodes: EAN128/UCC128, Code 39, Interleaved 2 of 5, Code 128

Arrival Journals

- Use-for item registration
- Make items available in inventory immediately after posting arrival journal
- Have the option of either manual or automatic suggestion of arrival and output locations according to storage and item setup

Pick and Shipments

- Send out electronically advanced shipping notification (ASN) to the receiver
- Specify that shipments are sales order-specific or customer-specific

Benefit statement:

Logistics helps you flexibly manage inventory and purchasing by connecting production, purchasing, and sales. A flexible BOM designer simplifies the creation and tracking of BOMs. You can also reduce logistics costs by optimizing purchasing processes and management of your inventory and warehouse.

Key questions:

- Can you track the location of your inventory?
- Do the pickers in your warehouses sometimes pick the wrong items?
- Can you quickly find previously used BOMs and transform them into new ones if needed?

Prerequisite:

Trade

Different Pallet Types

- Create pallet transports from the following order types: input, output, or refill orders
 - Prioritize according to order types
 - Consider different pallet types corresponding to different sizes when selecting locations
- Use RFID to register the pallets and inventory items, and control them throughout the supply chain



LANGUAGES IN MICROSOFT DYNAMICS AX

Microsoft Dynamics AX 4.0 can be implemented with any of the languages in the list below. The first language can be selected, and is included as part of the Microsoft Dynamics AX Base Package. Microsoft Dynamics AX has two options for working with additional languages. The first option is to license additional languages, and the second is to install but not license additional languages.

By licensing additional languages, each user on the system is given the option of presenting the Microsoft Dynamics AX user interface, the online Help, forms, reports, and menus in any of the licensed languages. Licensed languages can also be used in printed reports, invoices, purchase and sales orders, and other business documents, and by remote users in Enterprise Portal interfaces.

By merely installing additional languages, at no license cost, users can view and print reports in any of the installed languages, but the user interface must be chosen from the list of languages that have been licensed.

Note that even more languages than these may be available from value-added resellers (VARs) or Microsoft Certified Partners.

Benefit statement:

By licensing additional languages, you can spread the power of Microsoft Dynamics AX internationally, to subsidiary offices in other language zones, and also to customers, vendors, and other business partners who speak different languages.

Key questions:

- Can you support users who prefer to use different languages in their daily job?
- Can you print and send business documents to customers and business partners in any of their preferred languages?

Prerequisite: Base Package

Available Languages

[Chinese \(simplified\)](#)

[Czech](#)

[Danish](#)

[Dutch](#)

[Dutch \(Belgium\)](#)

[English \(Australia\)](#)

[English \(Canada\)](#)

[English \(India\)](#)

[English \(Ireland\)](#)

[English \(Malaysia\)](#)

[English \(New Zealand\)](#)

[English \(Singapore\)](#)

[English \(South Africa\)](#)

[English \(United Kingdom\)](#)

[English \(United States\)](#)

[Estonian](#)

[Finnish](#)

[French](#)

[French \(Belgium\)](#)

[French \(Canada\)](#)

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[Portuguese \(Brazil\)](#)

[Russian](#)

[Spanish](#)

[Spanish \(Mexico\)](#)

[Swedish](#)

[Thai](#)

[Turkish](#)

* Japanese language expected to be available mid-2007.

Configuration and Development

BUS LAYER RUNTIME

Partners and independent software vendors (ISVs) can develop customized vertical or horizontal solutions or modules that use the BUS layer in Microsoft Dynamics AX. If you want to implement a BUS layer solution, you can choose to license only the BUS Layer Runtime needed to execute the partner-developed solution, without licensing the entire MorphX® Development Suite. This saves some expense, but the BUS Layer Runtime without the MorphX Development Suite will not allow you

Key question:

- Do you want to implement a third-party add-on module without using X++®, MorphX, and Web development for future customizations?

Prerequisite: Base Package

to make additional modifications to the partner-developed solution.

MORPHX DEVELOPMENT SUITE FOR MICROSOFT WINDOWS

MorphX is an Integrated Development Environment, or IDE, because it integrates several different functions such as designing, editing, compiling, and debugging within one common environment. The MorphX Development Suite for Microsoft Windows® includes editors for the Microsoft Dynamics AX client for Microsoft Windows, so system administrators can add new functionality and modify existing functionality quickly and with limited coding. Licensing the MorphX Development Suite for Microsoft Windows gives you the power to create, modify, and delete Application Objects, which are the building blocks of the Microsoft Dynamics AX application. Objects in Microsoft Dynamics AX are stored in the Application Object Tree (AOT).

You need the MorphX Development Suite for Microsoft Windows in order to run modifications to Microsoft Dynamics AX or vertical add-on solutions that require objects listed in the MorphX Objects section on the following page. An exception to this rule would be if you license the VAR or BUS Layer Runtimes described elsewhere in this guide; however, the MorphX Development Suite for Microsoft Windows gives you the flexibility to modify your customized functionality whenever you need to.

Note that a technical description of each of the tools and Objects listed is beyond the scope of this document. For more information, refer to the appropriate technical documentation or ask your Microsoft Certified Partner for more information.

MorphX Development Tools (Microsoft Windows Client)

The following tools are available in the Microsoft Dynamics AX Base Package, but you must license the MorphX Development Suite for Microsoft Windows in order to use them to modify your solution:

- Table browser
- Visual MorphXplorer
- Code profiler
- Application Hierarchy Tree
- Cross references

The following tools are available only if you license the MorphX Development Suite for Microsoft Windows:

- ActiveX® explorer
- Import/export objects
- Upgrade framework
- Merging functionality
- Label system

MorphX Objects

Objects are the most basic components of Microsoft Dynamics AX functionality. Each Object is an entity that performs one or several functions within Microsoft Dynamics AX. MorphX provides the capabilities to modify and extend the functionality in your Microsoft Dynamics AX solution. Objects can be created, modified, and deleted with the MorphX development tools. The objects provided by MorphX can be found below:

- Tables
- Maps
- Views
- Extended Data Types
- Base Enums
- Feature Keys
- License Codes
- Configuration Keys
- Security Keys
- Table Collections
- Perspectives
- Macros
- Forms
- Reports
- Queries
- Jobs
- Menus
- Menu Items
- Online Help

Note that if you prefer to have system adjustments or new developments made to your installation on-site or locally, you may need to license the Microsoft Dynamics AX MorphX Development Suite for Microsoft Windows, MorphX Development Suite for Web, and X++.

Benefit statement:

MorphX provides a user-friendly development environment for partners and customers, which can help speed up the development process during implementation and result in a lower implementation cost for the solution. The power, flexibility, and ease of use of MorphX can also decrease the time and costs associated with upgrading and modifying the solution to keep pace with your growing business needs as your company expands. Furthermore, you can modify and extend Microsoft Dynamics AX with greater confidence, because the layered structure of the solution keeps modifications separate from the core solution itself. You can revert to an earlier state in your upgrade process if you need to, without affecting the core solution.

Key question:

Do you need an integrated business application that you can upgrade and modify with confidence?

Prerequisite:

Base Package

VAR LAYER RUNTIME

Any partner can develop customized vertical or horizontal solutions or modules for Microsoft Dynamics AX that use the VAR layer. If you want to implement a VAR layer solution, you can choose to license only the VAR Layer Runtime needed to execute the partner-developed solution, without licensing the entire MorphX Development Suite for Microsoft Windows. This saves some expense, but the VAR Layer Runtime without the MorphX Development Suite for Microsoft Windows will not allow you to make additional modifications to the partner-developed solution.

Key question:

Do you want to use a partner-developed custom solution, without using X++, MorphX, and Web development for future customizations?

Prerequisite: Base Package

Other Business Essentials Functionality

DATABASE LOG

Microsoft Dynamics AX has its own built-in logging feature, which enables users or administrators to see when a record was created or last changed, and who changed it. However, this information is only tracked for the last change made to each record. If five users edit a given record, information will only be stored about the final edit.

By licensing Database Log in Microsoft Dynamics AX, users and administrators get a history of the inserts, updates, renames, and deletes for tables and fields that they choose within a set of company accounts. The log can track every transaction and change in the system, or it can track only selected tables. Users or administrators can view information about:

- The type of change to each selected record, and the old and new values of the record that has been changed.
- The date and time of the change.
- The user who performed the change.

Benefit statement:

Database Log can give administrators a detailed history of every transaction and every change that was made to any record in the system, or to a selected set of tables. This improves administrators' oversight of company data.

Key question:

Can you view a history of the changes made to your tables and records, including a log of who made each change?

Prerequisite: Base Package

ELECTRONIC BANKING

Electronic Banking in Microsoft Dynamics AX supports the import and export of payment files from and to financial institutions in several countries. The functionality is spread across accounts receivable and accounts payable.

Electronic Bank Management

- Supports export and import formats for handling electronic payments

Benefit statement:

By handling incoming and outgoing payments electronically, you can reduce time-consuming manual processes, increase the speed of business, and reduce the chance of human error.

Key questions:

- Does your company spend too much time and too many resources managing payments manually?
- Is your company cut off from certain customers or vendors who require electronic bank exchanges for payments?

Prerequisite:

Financials I

APPLICATION OBJECT SERVER

An Application Object Server (AOS) executes business logic for thin clients, enables multiple connections to the Microsoft Dynamics AX database, conducts load balancing, and much more. One or more AOSs are required to implement a Microsoft Dynamics AX installation. This three-tier architecture enables Microsoft Dynamics AX to be run on thin clients over Wide Area Network (WAN) connections, and can result in a lower total cost of ownership (TCO) for the whole solution. The Microsoft Dynamics AX Base Package includes one AOS.

Three-Tier Environment Support

Three-tier thin client

- Lower requirements for client machinery and bandwidth
- Improved database security, because only the AOS has a connection to the database, eliminating the need for multiple client connections

Cluster Technology

- Automatically balance users between servers in the cluster
- Increase redundancy and capacity, simply by adding extra AOSs
- If one server fails, clients only have to reconnect to continue working, reducing downtime

Remote Site and User Support

- Remote sites and users can use AOS to connect to a central Microsoft Dynamics AX solution through a WAN, without the need for any additional software

Web Development

- Install, update, configure, or launch Microsoft Dynamics AX with the touch of a button
- An ActiveX component on a Web page shows the status of the local installation

Benefit statement:

Microsoft AOS technology supports the scalability of Microsoft Dynamics AX. AOS servers can help companies enhance and utilize the flexibility, performance, redundancy, and connectivity of their Microsoft Dynamics AX solution.

Key questions:

- Can you add users to your solution without system downtime?
- Do you want your company's subsidiary offices to be able to connect to your solution at low cost?

Prerequisite: Base Package

RECORD LEVEL SECURITY

This functionality enables administrators to set security and permissions for Microsoft Dynamics AX user groups at the individual record level. Restrictions can be placed on any number of tables on a per-user group basis. Security restrictions are applied within individual companies, and therefore enable different settings to be applied within different companies.

For example, a Microsoft Dynamics AX solution with Record Level Security enabled can be set to allow salespeople within a user group to view and edit business information for only the customer records assigned to that user group.

Record Level Security Features

- Enables administrators to specify user group-based permissions to each individual record within a table, rather than setting a blanket permission for the whole table
- Restrictions to tables must be explicitly set by administrators; if no Record Level Security has been specified, then all records in a table are accessible

Note that Record Level Security is controlled by the permission system in the Base Package. Therefore, users will only be permitted the maximum access to data that is allowed by their user group setup in the core permission system.

Benefit statement:

Record Level Security works in addition to the standard permission system within Microsoft Dynamics AX, and provides greater flexibility in setting permissions.

Key question:

Can you control security options for employees who only need to view and edit a subset of your business data, such as individual customer, project, vendor, or employee accounts?

Prerequisite: Base Package



Advanced Management

Advanced Management edition is the preferred solution for growing organizations that need an adaptable solution with complex, highly functional financial and accounting programs.

This edition helps customers obtain the key business intelligence and reporting they require to manage their organizations.

Advanced Management includes the functionality in the Business Essentials edition plus the modules in the following section.

BUSINESS ANALYSIS

With Business Analysis in Microsoft Dynamics AX, you can compare vendor data, analyze warehouse operations, develop strategies to retain preferred customers and attract new customers, create customer profiles and segmentation analyses, and more.

General

- Easy-to-use, intuitive layout and structure
- Generate OLAP cubes to analyze business data by many dimensions or combinations of dimensions
- View OLAP cubes within Microsoft Dynamics AX or by using PivotTable® views in Microsoft Office Excel® to visualize the data in different ways
- Use Microsoft tools such as Excel and ProClarity to connect to and explore data in OLAP cubes

Microsoft Analysis Services

- Available on Microsoft SQL Server 2005 and Microsoft SQL Server 2000*
- Full synchronization with Microsoft Dynamics AX
- Create, maintain, and control OLAP databases and cubes

Microsoft Reporting Services

- Define, save, and share ad-hoc reports
- Real-time data retrieval from primary or replica application database
- Create security-enhanced reports using drag-and-drop report authoring

Business Intelligence Metadata

- Fully integrated metadata in the Microsoft Dynamics AX development environment
- Fine tune ad-hoc reporting experience as needed
- Automatically generated SQL Server Reporting Services report models for Report Builder

Generation and Viewing of Cubes

- Cube Definition Manager can take advantage of the Microsoft Dynamics AX data model
- Use Microsoft Dynamics AX forms for easy setup
- Create cubes in multiple currencies and languages
- Periodic batch update possible for all cubes
- General overview of available views and automatic filtering from Microsoft Dynamics AX base data on PivotTable views

Security and Configuration

Access to OLAP cube data from within Microsoft Dynamics AX can be controlled through user permissions to access PivotTable

Benefit statement:

Business Analysis helps you analyze the factors that affect your bottom line with flexible and customizable OLAP analysis tools. You can share information such as customer purchasing and vendor inventory, and identify weak spots in your company's supply chain so that you can make the necessary changes.

Key questions:

- Can you get actionable business information from your mass of business data?
- Can you explore your business data from any parameter or set of parameters you want?

Prerequisite:

Microsoft SQL Server 2005 Reporting Services (for Report Builder Tool)

* Customers are encouraged to upgrade to Microsoft SQL Server 2005. Future releases of Microsoft Dynamics AX may not support Microsoft SQL Server 2000.

views. Administrators should be aware that data retrieval when querying cube data is not secured to reflect Microsoft Dynamics AX permissions by default. Because cubes are typically browsed and reported against using tools like Excel and ProClarity, administrators should consider using native SQL Server 2005 Analysis Services tools to define security for the cubes deployed from within Microsoft Dynamics AX. SQL Server 2005 Books Online contains several topics on securing cubes.

(Download an updated version at www.microsoft.com/downloads/details.aspx?familyid=BE6A2C5D-00DF-4220-B133-29C1E0B6585F&displaylang=en.)

Third-Party Products

Any Microsoft or third-party product or add-on that supports Microsoft Analysis Services, such as Excel or ProClarity, can be used for viewing cubes and exploring cube data more comprehensively than with the native Microsoft Dynamics AX viewing tools. However, additional Microsoft or third-party add-ons are not strictly necessary.

MICROSOFT DYNAMICS CRM SERVER

Microsoft Dynamics CRM Server can be delivered with the purchase of your first Microsoft Dynamics CRM client access license (CAL). If you license Microsoft Dynamics CRM together with Microsoft Dynamics AX, you can receive a license for Microsoft Dynamics CRM Server at no additional cost. Please see www.microsoft.com/dynamics/crm/default.aspx for more information about Microsoft Dynamics CRM.

Supply Chain Management

WAREHOUSE MANAGEMENT I

Warehouse Management I in Microsoft Dynamics AX provides inventory dimensions, which you can add to all your inventory items to track not only which warehouse they are in, but also precisely where they are stored in each warehouse.

Inventory Dimensions

Location dimension enables you to specify the exact put-away location when receiving items. When selling items, the user can specify exactly where the selling items were taken from. On-hand inventory can be viewed with location for a clear and complete overview of items.

Benefit statement:

Warehouse Management I gives you a way to track precisely where your inventory is stored across your warehouses. This helps reduce the time your employees spend searching for items or products, and can speed up your response time for fulfilling orders and delivery.

Key questions:

- Do your employees spend too much time searching your warehouses for items or products?
- Have you ever lost orders because your employees couldn't find items in your warehouses quickly enough?

Prerequisite:

Logistics

Manufacturing

RESOURCES

All the resources your company uses for production can be divided into four work centers: machinery, people, tools, and vendors. Resources in Microsoft Dynamics AX helps you register and organize all your production or project resources, so you can use other tools such as Production II or Project I to get the maximum benefits from these resources.

Resources

- Categorize resources across four work centers as groups or individual resources
- Define each resource in terms of efficiency, to track whether some resources complete jobs more quickly than others
- Set the capacity of each work center with a unique calendar that shows the work center's availability over time
- Define a setup cost and running cost per hour for each work center and an incremental cost per item to gain insight into total production or project costs

Prerequisite: To be used with Production II or Project I (see Production II and Project I)

PRODUCTION I

Production I in Microsoft Dynamics AX gives you the ability to create a production BOM so you can track the raw materials that go into your finished products. Actual raw material consumption and finished product information is automatically posted to the general ledger from this module.

Creation of Production Orders

- Manual creation of production orders
- Create production orders through planned production orders in Master Planning
- Create production orders directly from a sales order line
- Plan production orders directly from sales orders

Subcontracting

- Purchase of services from subcontractors
- Vendor delivery note
- Vendor account on warehouse to find the correct delivery address

Production Orders

- Production orders can be categorized into pools for scheduling or groups to be posted in the general ledger
- Quick overview of the status of the production order
- Track actual production costs against estimated and standard costs
- Split a single production order into two or more orders
- Link sub-contractor purchase orders to the production order

Production Bill of Materials

- A standard BOM is copied to the production order, where it can be modified if needed
- Supports measurement formulas to calculate consumption
- Supports negative quantity on BOM lines to handle by-products of production
- Each item within a BOM can be controlled by line-types, such as sub-production, phantom BOM, subcontract or raw material

- A graphical BOM display gives you a visual representation of changes you make to create “what-if” scenarios

Scheduling

- Production scheduling can be done forward or backward with different dates as starting points based on lead time of raw material
- Finite or infinite material scheduling
- Rough cut or detailed job scheduling

Production Status

- Production orders follow these steps:
 - Created
 - Estimated
 - Scheduled
 - Released
 - Started
 - Report as finished
 - Costed

Production Status Control

- The production order can be rolled back and deleted if required until the costed stage

Financial Integration

- Online updating of WIP (items in process and work centers in process) and actual cost to the general ledger when updated in Production

Production Consumption

- All consumption is reported through journals; journals can be automatically generated and posted
- Supports backward flushing of items
- Scrap can be handled either as a constant or a variable

Benefit statement:

Production I helps you minimize lead times and satisfy customer demand with flexible BOM scheduling options. Online updating of work in process (WIP) and actual costs to the general ledger mean that you can always have an up-to-date picture of where products are in your production process. If a customer is using a standard cost method, then the general ledger would be updated with standard costs and variances.

Key question:

Can you get an up-to-date, on-demand overview of raw materials consumption in your production process?

Prerequisites:

Logistics and Master Planning (see Master Planning below)

MASTER PLANNING

Master Planning in Microsoft Dynamics AX uses information from across your company and supply chain to help you optimize production and materials planning and scheduling. Finite materials and capacity scheduling can be performed at the same time so that available capacity, inventory levels, and purchase lead times are taken into consideration in production planning.

Forecast Scheduling and Master Planning

- Forecast scheduling provides an overview of longer-term purchase, production, and resource requirements–based multiple forecast scenarios
- Create multiple plans for short-term master scheduling to explore material and capacity requirements based on existing orders or different scenarios

Coverage Groups

- Coverage groups enable you to attach different time fence controls to different items
- Products or items that are more time-consuming to produce should have a longer time fence so you can extend production planning over a longer period

Scheduling Methods

- Set two different levels of scheduling: operations scheduling, which schedules operations and lead times by day, and job scheduling, which schedules operations by day and time; coverage groups enable you to attach different time fence controls to different items

Messages

- Messages flag orders that cannot be delivered on the requested date in the future; the message shows the earliest possible delivery date based on materials and capacity requirements
- Action messages suggest changes to existing orders and planned orders to confirm adequate quantity in inventory to meet requirements, and will also suggest updated delivery dates based on times

Order Promising

- Sales order explosion gives you the ability to break down a BOM item and calculate

- an earliest possible delivery date based on route and incoming items
- Available-to-promise (ATP): calculates delivery date based on available inventory and current production orders
- Capable-to-promise (CTP): calculates delivery date based on available materials and production capacity
- Sales and Marketing in Microsoft Dynamics AX enables you to tie quotations to planning materials in Master Planning

Benefit statement:

Master Planning can help you tightly plan production, and purchase and transfer orders and net requirements. You can minimize lead times and maximize on-time deliveries to customers, respond quickly to changes in demand, and reduce inventory levels.

Key questions:

- Do you maintain large safety stocks distributed across different sites to keep from running out of inventory unexpectedly at any of those sites?
- Does your sales staff sometimes promise delivery dates that you cannot fulfill?

Prerequisite: Trade

Project Management

PROJECT I

Project I in Microsoft Dynamics AX enables you to track time and materials consumed and follow up on time and material projects and internal projects. You can itemize time and materials for invoicing, while retaining sales prices and cost of items and man hours.

Registration and Data Entry

- Itemize project costs, employee hours, materials used, and fees incurred by the customer and enter them into the journal
- Enter hours remotely over the Internet with Enterprise Portal
- Create your own project hierarchy
- Follow up on status of deliveries and sales and purchase orders

Invoicing

- Invoice each project or project group, and retain itemized time and resource costs
- Sub-projects can also be invoiced separately or together, which makes it possible to have a single project with multiple invoices for different customers
- Approval procedures can be set for invoices, to make sure that responsible managers sign off on invoices before they are sent to the customer
- Prepayments can be tracked and applied to future invoices
- Enter project costs directly into accounts payable or purchase orders
- Use flexible-line property setup to capture chartable and non-chartable costs
- Adjust transactions before creating your invoice proposals, and edit invoice proposals before final invoicing

Project Management

- Break down the time and materials used on projects and assign individual hours or items to sub-projects for more detailed control of costs and consumables
- Project structures can be saved so that budgets, sub-projects, and activities can be copied from previous projects and applied as a template to new projects
- Schedule tasks and allocate resources and capacity to future tasks

Accounting

- Project I is tightly integrated with general ledger functionality, so that dimensions can be applied to every transaction in a project

- Detailed posting profiles can be set up, so that transactions can be posted to specified ledger accounts depending on preset criteria

Inquiry and Reporting

- A report generator enables extended reporting with load and save capabilities
- A statistic form compares project budgets to consumption over time
- General ledger integration makes it easy to follow transaction details for a single project or group of projects

Benefit statement:

Project I is designed for project-focused companies, and also companies that run projects such as research programs, services, IT installations, and product support. The module can analyze progress in real time, comparing the financial performance of each project or the entire company against predefined goals.

Key questions:

- Can you quickly analyze the financial performance of internal and external projects by comparing resources consumed and revenue earned to the project budgets?
- Are you concerned with your ability to effectively manage your cash flow because of delays in invoicing customers for work performed?

Prerequisites:

Trade, Resources (optional), and Logistics (for item forecasts)

Customer Relationship Management

MARKETING AUTOMATION

Marketing Automation in Microsoft Dynamics AX enables you to divide your customers and prospects into groups, based on sales and demographic information from Sales Force Automation in Microsoft Dynamics AX. By extracting groups of customers and prospects based on your sales and CRM data, you can group your customers and prospects into campaigns. You can develop tightly targeted marketing campaigns to optimize your sales performance. You can also use this module to manage non-sales-related communications such as newsletters and membership drives.

Communications Management

- Create campaigns based on sales and communication and demographic information from across the Microsoft Dynamics AX database
- Assign communication tasks to sales or marketing staff based on responsibilities and specializations
- Automatic generation of marketing campaign activities based on company-defined policies
- Link campaigns, questionnaires, projects, and Web responses
- Divide campaigns into sub-campaigns to reach more specific audiences
- A campaign can be linked to a project, so that cost and revenue on the campaign execution can be recorded (requires Project I)
- Broadcast campaigns via e-mail, Web, fax, mail, and phone
- Use existing campaign structures as templates for new campaigns

Marketing Encyclopedia

- Common repository for all of your sales and marketing collateral
- Exchange sales and marketing knowledge
- Review sales material such as information on product lines, products, and price lists
- Categorize sales and marketing materials (product line, white papers, graphics, Web sites, and videos) for quick access
- Access information in the encyclopedia, which supports Web links, audio/video clips, presentations, and graphical software
- Track and review competitor information and trends with competitor Web sites

Benefit statement:

Marketing Automation helps you make campaign planning, execution, and analysis easier by grouping customers and prospects together based on criteria you can specify, and by placing all relevant marketing information at your fingertips. You can base campaigns on back office and front office information, which helps you organize, execute, track, and analyze them more easily and with greater insight.

Key questions:

- Do you have an easy way to segment your customer or prospect base and send a consistent package of marketing materials or communications to any given segment?
- Can you pull up an in-depth analysis of customer feedback from your last marketing campaign, so you can learn how to make your next campaign even better?
- Do your marketing professionals have enough customer feedback information to build a picture of who your customers are and what they want?

Prerequisite:

Sales Force Automation

Extends with:

Questionnaire and Project

TELEMARKETING

Designed for sales teams or telemarketing groups, Telemarketing in Microsoft Dynamics AX supports telephone-related customer support and marketing programs, including sales-lead generation, customer surveys, direct marketing campaigns, and customer support.

Telemarketing

- Create call lists based on contact data
- Telephones dial automatically
- Calls that were not initially successful are identified so that further attempts can be made
- Automatic generation of telemarketing activities based on company-defined policies
- Integration between campaigns and call list
- Integrate questionnaire data in the sales process
- With the Questionnaire functionality, you can build custom call scripts to guide staff through phone call interactions
- A telemarketing window contains all the relevant information your marketing and customer support specialists need on their calls
- Computer Telephone Integration (CTI) via Telephony Application Programming Interface (TAPI)
- Full call logging that includes time, date, duration, caller, and more
- Extract customer groups and allocate responsibility for calls to these groups across your telemarketing or phone support staff
- Analysis tools measure employee performance and call statistics

Benefit statement:

Telemarketing helps users execute and manage telephone-assisted sales and marketing activities from one connected solution. The module enables users to improve lead generation and qualification, execute guided calls efficiently with call center functionality, and use data from telemarketing activities directly in the sales process.

Key questions:

- Do you know how effectively your telemarketing personnel use their time?
- Do your marketing and customer support specialists have a single tool that gives them all the information they need about leads and customers, and that helps them manage individual calls consistently?
- Can you take information from your telemarketing processes and spread the knowledge out to support your overall sales processes?

Prerequisite:

Sales Force Automation

Extends with:

Marketing Automation and Questionnaire

SALES FORCE AUTOMATION

Sales Force Automation in Microsoft Dynamics AX registers prospect and customer information and the details of each interaction between your sales staff and the outside world, and the process from initial bid to sales order.

Contact Management

- Store information on prospects, customers, vendors, and other business contacts
- Register activities associated with the sales process
- Synchronize activities as appointments and tasks with Outlook
- Configurable mapping of Microsoft Dynamics AX fields to Outlook
- Data protection in Outlook synchronization process
- Drag files, documents, and e-mail messages from Windows Explorer and Outlook into the document handling system of Microsoft Dynamics AX
- Log transactions on selected records
- Import prospects with business and contact details
- CTI using TAPI
- Send e-mail and Short Message Service (SMS) messages to individuals or groups
- Track all additions, changes, and deletions to contact and sales process information performed by your sales staff
- Track all mail, telephone, and e-mail communications between sales staff and the outside world
- Generate and record communications to groups of customers based on selected criteria applied to customer data

Sales Process Management

- Generate leads by importing them from external sources, then allocate responsibility for leads to your sales staff and track the quality of leads
- Extend offers to groups of leads, based on customized profiles

- Full integration with other parts of Microsoft Dynamics AX gives you easy access to sales-related information
- All the relevant product, project, and financial data, such as manufacturing cost, item availability, and delivery time can be available to sales staff, depending on the Microsoft Dynamics AX modules licensed in your solution

Benefit statement:

Sales Force Automation helps you manage your customer relationships effectively. Users can increase sales force productivity and effectiveness, easily identify and seize sales opportunities, and gain a company-wide overview of all customer- and prospect-related activities.

Key questions:

- Do you need to record your contact and communication information for all your customers and prospects?
- Do you have easy access to information on what customers have bought and what they could potentially buy before you make a customer call?
- When talking to a customer on the phone, are you able to identify at a glance what type of customer they are and which activities your colleagues have previously undertaken with this customer?
- Are you able to record sale orders and agreements with the customers directly into the system, minimizing the time spent on reporting?

Prerequisites:

Financials I and Trade

- Sales quotations are extended to highlight the sales process, integrating sales orders and master planning
- Track the effectiveness of sales and marketing staff
- Assign probability percentages to your sales quotations in order to get a better overview of your sales pipeline and help optimize your purchasing and production decisions in Master Planning

SALES MANAGEMENT

Sales Management in Microsoft Dynamics AX enables you to analyze the performance of your sales staff, sales teams, and the entire sales organization. With user-defined graphs you can retrieve and work with data from anywhere in Microsoft Dynamics AX to gain a better understanding of your sales processes and drive it to success.

Sales Staff Budgeting

- Define sales targets for individuals
- Automatically compare sales figures with budgets to measure sales performance
- View sales performance by multiple selected dimensions to aid sales flow analysis

Management Statistics

- Extract data from anywhere in Microsoft Dynamics AX
- Define groups of data by any table value or period intervals
- Sum values from any numerical table fields or table methods chosen
- Find your highest, lowest, average, and count in any data set
- Manage and monitor the activities of sales teams
- Create queries based on default query templates including the status of sales activities, pending sales quotations, and lead management
- Define queries by individual employees or teams
- Display sales data graphically for an intuitive understanding of your business flows
- Export sales data and graphics to external applications

Benefit statement:

Sales Management helps you make detailed queries about sales and market data from Sales Force Automation. The query results help you gauge effectiveness and measure performance across your sales organization, so you can simplify and improve the management of your sales pipeline.

Key questions:

- Do you need to measure the performance of individual members of your sales staff?
- Do you need to know where your leads are in the sales process compared to last year?
- Do you need a full overview of your sales performance—both past and present?
- Can you easily get details about your sales pipeline—today and tomorrow?
- Do you need to follow up with your sales representatives on a daily basis?

Prerequisite:

Sales Force Automation

Extends with:

Marketing Automation, Telemarketing, Project I, and Questionnaire



Advanced Management Enterprise

For organizations with complex needs, Advanced Management Enterprise edition extends the Advanced Management edition by also providing a rich set of advanced supply chain management, field service, configuration, manufacturing, and development capabilities. See the Microsoft Dynamics AX price list for more information.

Financial Management

COST ACCOUNTING I (COST CENTER ACCOUNTING)

Cost Accounting I in Microsoft Dynamics AX is an internal cost flow analysis tool that helps you achieve a deeper insight into the costs incurred by your business. With Cost Accounting I you can measure in detail the economic performance and profitability of your business operations and business units.

Cost Center Accounting

- Flexible mapping of cost accounts into cost categories
 - Dimensions setup for cost accounting
 - Service categories for quantities management (integrated with Production and Project)
 - Flexible reporting system featuring multiple line definitions and structural hierarchies
- Integrated cost accounting journals for booking internal cost accounting transactions on cost amounts or quantities
 - Flexible and versatile allocation and distribution capability, including multiple parallel calculation versions
 - Specific budgeting and forecasting capability, linked to ledger budget

Prerequisite: Base Package



COST ACCOUNTING II (OPEN DIMENSIONS)

License up to seven more financial dimensions to complement the three provided in the Base Package to perform more extensive analytical accounting. Open Dimensions enables allocation via debit/credit from one dimension type value to another.

Prerequisite: Cost Accounting I

COST ACCOUNTING III (INTERNAL COST ACCOUNTING)

With Cost Accounting III in Microsoft Dynamics AX, you can allocate or apportion costs through cost rates.

Prerequisite: Cost Accounting I

COST ACCOUNTING IV (FLEXIBLE PLANNED COST)

Cost Accounting IV includes accounting and budget forecasting features. Flexible cost calculation capability enables cost planning based on capacity usage and measure deviation of the target cost according to actual capacity usage and costs.

Prerequisite: Cost Accounting I



Supply Chain Management

INTERCOMPANY

Intercompany in Microsoft Dynamics AX enables several subsidiaries or distribution centers to trade with each other internally within one Microsoft Dynamics AX installation. Sales and purchase orders can be created manually or automatically across your subsidiaries.

Intercompany

- Define and apply different trading policies when trading between different Microsoft Dynamics AX companies
- Create Intercompany order chains directly and automatically from sales order to end customer with and without direct delivery
- Create sales orders in real time, and update intercompany sales orders from purchase orders and vice versa
- Full order and logistics transparency upstream and downstream in the intercompany chain
- Support for master scheduling across companies



- Support for automatic payment and settlement
- Support for multiple intercompany pricing policies
- Support for various degrees of process automation for sales and purchase orders
- Exchange of information between companies, subsidiaries, and distribution centers without having to use identical identification for customers, vendors, items, or units
- Receive items based on the selling subsidiary's delivery note
- Invoice items based on the selling subsidiary's invoice
- Make stock-on-hand inquiries in all subsidiaries

Benefit statement:

Intercompany can give you and your customers more accurate information about inventory on-hand and delivery times. You can minimize backorders on items you've promised customers and reduce your stockholding costs by having visibility into inventory in all subsidiaries and sourcing inventory across locations.

Key questions:

- Can one site at your company order inventory electronically directly from other sites in your network?
- Is your company forced to tie up funds in large safety stocks distributed across different sites to keep from running out of inventory unexpectedly at any of those sites?
- Can you determine the exact inventory levels of items at all your sites to make sure you can give your customers what you promised them?

Prerequisite:

Trade

WAREHOUSE MANAGEMENT II (INVENTORY DIMENSION)

Warehouse Management II in Microsoft Dynamics AX adds logic and rules to the placement of inventory across your warehouses. When you receive inventory items, this module suggests optimal placement for storage in your warehouses based on preset rules. When you receive an order, the functionality not only tells you where it is with pallet identification, but can also generate an optimized picking route.

Placement and Storage

- Specify different location and storage policies at both the warehouse level and the item level
- Random location storage functions determine the storage location based on rules regarding size, volume, and height

Storage Dimensions

- Describe storage by individual warehouse, pallets, and locations

Warehouse Zones and Locations

- Organize warehouses into storage zones in order to prioritize selection of locations for incoming inventory
- Specify warehouse locations on five levels: warehouse, aisle, rack, shelf, and bin

Random Location Storage

- Determine storage location based on rules regarding size, volume, and height
- Allocate storage based on priority of picking locations first and then buffer locations

Pick and Shipments

- Drill down output orders to possible pick locations through the shipment journal
- Include shipments for multiple orders per customer

Output Orders

- Release order-picking sales order helps ensure you have stock on hand for multiple orders
- Derive output orders from sales order lines or production order lines

Benefit statement:

Warehouse Management II can save you time and resources when receiving items by suggesting optimized placement for storage in your warehouses. Optimized picking routes can also save time when picking and shipping items from your warehouses. Overall, this module helps you respond more quickly to orders and reduce inventory costs.

Key questions:

- Can you track where your inventory is with precision, down to the individual pallet?
- Do your employees spend too much time trying to find the best place to store newly received items in your warehouses?
- Are your warehouse operations less efficient than they should be because your employees don't use picking routes?

Prerequisite:

Warehouse Management I

- Generate output orders as requisitions to warehouse
- Define shipments so that they result in the creation of optimized picking routes

Shipments

- Point out orders that can be shipped together to reduce total picking time
- Consolidate shipments of multiple sales orders placed by the same customer
- Derive output orders from sales order lines or production order lines

Pallet Transports

- Create pallet transports to move groups of items within and between warehouses

Barcoding

- Print pallet label, location label, and bill of lading labels that include barcodes for automatic tracking
-

Manufacturing

DEMAND PLANNER

Demand Planner in Microsoft Dynamics AX helps you to more accurately forecast sales and materials requirements to reduce costs, increase customer satisfaction, and drive better business decisions. Collaboration features of the module make it easy to consolidate input, manage consensus, and share your forecasts with other departments and business processes.

Demand Planner

- Flexible forecast generation
- Three-dimensional, configurable data hierarchies
- Improved information management
- Enhanced collaboration tools
- Enhanced setup and configuration with import and export capabilities
- Simplified authentication
- Compliance with trustworthy computing standards

Benefit statement:

With Demand Planner you can quickly access demand information to generate forecasts, reducing planning time and horizons. You can define the information hierarchies and detail level you need to create more accurate forecasts. With reliable forecasts, you can hone inventory levels and time purchasing to optimize inventory levels and lower costs. Share forecasts to improve organizational buy-in and drive business decisions.

Key questions:

- Can you quickly retrieve information needed for forecasting?
- Do you spend an excess amount of time planning due to poor access to essential information?
- Are you unable to achieve the level of insight and detail you need to accurately forecast?
- Do you have the ability to share forecasts within your company to improve business insight?

Prerequisites:

Master Planning and SQL Server

PRODUCTION II (ROUTING MANAGEMENT)

Production II in Microsoft Dynamics AX enables you to plan and execute routes, operations, and rough capacity to get accurate lead times. You can use finite or infinite scheduling, and you can track costs and calculate scrap while posting all business information automatically to the general ledger.

Route Complexity

- Plan simple, sequential routes, or complex networks of routes
- Plan simultaneous operations in route networks by using primary and secondary operations in a route
- Multiple work centers attached to the same operation
- Designate a work center as a subcontractor

Route Simplicity

- Share route information between items that have the same characteristics

Scheduling

- Finite or infinite scheduling, forward and backward from various dates
- Rough-cut capacity planning

Operation Components

- Describe each operation component in the production route by any of a number of descriptors, such as: queue time, setup time, run time, transit time, queue time after operation, overlap quantity, cost categories, multiple-resources control, and capacity load per operation

Scrap Calculations

- Calculate expected waste per operation as a percentage, both by individual operation and by accumulated scrap over the whole production process

Cost Tracking

- Track detailed costs related to resources and throughput
- Include work center costs in production cost estimation
- Use automatic work center consumption when starting or finishing production orders

Benefit statement:

Production II helps you plan your resources to get the greatest efficiency out of your production process. You can track production progress and easily make changes to increase efficiency and reduce costs. Real-time updating of resource data helps you manage capacity and optimize your resource usage to drive down production costs and get more accurate delivery dates.

Key questions:

- Is your production floor less efficient than it should be because a lack of visibility into your resource capacity makes it difficult to create good routes and plans?
- Do you know at any given moment where your biggest production costs are?

Prerequisites:

Resources and Production I

PRODUCTION III (SHOP MANAGEMENT)

Production III in Microsoft Dynamics AX provides a Gantt chart to give you a graphical overview of your production process. You can reschedule jobs simply by dragging jobs around on the Gantt chart. The module also gives you detailed job management and production scheduling, including the ability to schedule jobs in each work center by the minute and second.

Gantt Chart

- Get a graphical presentation of your production schedules for easy visualization
- Reschedule your jobs simply by dragging items in the Gantt chart

Task Group

- Use alternative work centers for an operation in case of scheduling overloads
- Set up basic rules for which alternative work centers can be used

Bottleneck Scheduling

- Easily determine where your production bottlenecks are by checking future and current capacity loads
- When it reschedules jobs to avoid the bottleneck, Microsoft Dynamics AX automatically reschedules the rest of the route to reflect the new capacity loads

Job Monitoring

- Track the setup job or the process job per operation
- Report resource consumption based on job number

Scheduling Properties

- Set up jobs that require the same work center to all reach that work center simultaneously

Benefit statement:

The Gantt chart in Production III helps you easily visualize your production process and work center utilization as a whole, so you can anticipate and avoid bottlenecks. The simple drag-and-drop rescheduling function helps you save time in planning, and the detailed job management functionality gives you tight control over every aspect of your production floor.

Key questions:

- Can you get a quick visual overview of the present and future status of your production floor?
- Can you anticipate bottlenecks far enough in advance to prevent them from occurring?

Prerequisite:

Production II

PRODUCT BUILDER I (PRODUCT CONFIGURATION)

Product Builder I in Microsoft Dynamics AX enables you to set configuration options for your products, and it helps users customize products to their own preferences. The module automatically generates a bill of material (BOM), which captures the final custom product configuration chosen by the customer or user.

By licensing Product Builder modules with the Enterprise Portal and the Product Builder for Enterprise Portal functionality, you can extend your product configuration capabilities to your customers and users over the Internet. Please see Product Builder for Enterprise Portal.

Product Configuration

- Integrated with Microsoft Dynamics AX sales orders, purchase orders, and production
 - You can give every user a customized interface, showing only product options that apply to them
 - Enable each customer to configure their own products
 - Set default values for variables, so that they change depending on the user accessing them or the inventory item involved
 - Generate production of specific bills of material for each configured item
 - Ability to model complex models
 - Create different notes using drag-and-drop functionality
 - Define the model using a wizard to guide you through a series of menus and options
 - Create default values for variables depending on customers and/or inventory items
 - Limit some variables so that only specific users can change them
 - Reuse data from previous configurations
 - Generate item numbers based on the model variables
 - Configuration details can be printed on order documents using the standard Microsoft Dynamics AX document handling feature
 - Base price calculations on customers' choice of variables from product models. These can be set to fixed amount or percentage, or even programmed per variable
- See items during and after configuration
 - Specify preferred language text for user dialogs
 - Export or import product models
 - Use sub models that inherit variables from top to bottom and vice versa; sub models enable users to create configurations in several levels by connecting two models to each other

Benefit statement:

Product Builder I simplifies and streamlines the process of ordering, planning, and producing customized products to help you win more orders and increase customer loyalty. By creating a unique BOM for every product that is customized and ordered, you eliminate the need to keep a massive catalog containing every possible combination of product options.

Key questions:

- Do you give your customers a way to easily pick custom options for your products, without needing to involve sales staff?
- Are you struggling with a huge catalog of all your different item configurations?
- Do you need a way to simplify your product configuration options and tracking?

Prerequisite:

Logistics

PRODUCT BUILDER II (ROUTING BUILDER)

Product Builder II in Microsoft Dynamics AX enables you to set up default routes through your production process. The module then automatically chooses the most efficient route for every order placed through Product Builder, based on the item configuration and quantity ordered by the customer.

Routing Integration

- Create production-specific routes and job cards for each configured item
- Define default routes, based on templates, for the routes created in the product model
- Insert complete default route in product model

Benefit statement:

This module can make your production process more efficient by dynamically choosing the best route for every order.

Key question:

Does your company have to maintain a large catalog of possible routes, and do you spend time choosing routes manually for each order?

Prerequisites:

Product Builder I and Production II

PRODUCT BUILDER III (VALIDATION TYPES)

Product Builder III in Microsoft Dynamics AX enables you to create validation rules for variables, groups of variables, and the complete product configuration to help ensure that customers don't choose a combination of product options that you will not be able to produce. Each variable is a product option that can be chosen by your customers.

Validation Rules

- Validate values and display an error message based on the condition
- Create rules that govern the allowed content of variables (for each variable, for a group of variables, or for all variables in a complete product model)
- Add or remove values from enumerated text variables
- Assign values to specific variables based on the content of other variables
- Validate values and display an error message build from the condition
- Add or remove variables from the user interface based on customer choices
- Enable product models to deal with divergent national standards
- Make validation rules in X++ code

Benefit statement:

Product Builder III gives you an automated way to maintain the integrity of your product configurations, helping you ensure that customers stay satisfied and don't choose a product with options you can't deliver.

Key question:

Have your salespeople ever promised your customers item configurations that you were unable to produce and deliver?

Prerequisite:

Product Builder I

PRODUCT BUILDER IV (ADVANCED PRODUCT BUILDING)

Product Builder IV in Microsoft Dynamics AX enables you to create more complex rules and formulas using X++ code, which affects the options your customers and users can choose while configuring products.

Advanced Configurations

- Provides access to all of the tables and classes in your Microsoft Dynamics AX installation
- Makes it possible to create complex formulas for tasks such as the calculation of raw material consumption
- Enables you to create advanced calculations using X++ programming language; variables can be declared as any table, class, or data type in Microsoft Dynamics AX

Benefit statement:

By applying more complex rules and formulas to the product configuration options you present to your customers, you can create product models of much greater sophistication. Your customer will never see the code itself, but will be presented with a series of logical choices and sub-choices based on the product options available to them as they place the order.

Key questions:

- Are your product models too sophisticated or complex for your sales staff to work with quickly, accurately, and consistently?
- Do you wish you had a simple, automated way to lead your customers through the process of ordering and configuring your more complex products?

Prerequisites:

Product Builder I
and X++ Source Code

SHOP FLOOR CONTROL I (TIME AND ATTENDANCE)

Shop Floor Control I in Microsoft Dynamics AX helps you reduce manual data entry with automated collection of employee time and attendance. Set up profiles to track employee attendance, and capture actual attendance and absence time automatically to calculate work time and paid time for each employee.

Collection of Employee Time and Attendance Information

- Set rules for flexible working hours while maintaining control of the total hours your employees spend on the job, including collection and management of overtime
- Advanced time profile setups
- Automatic profile search and profile calendar
- Work planner tool for setting up shift schedules
- Register personnel absence and integrate with human resources
- Notice board with individual messages and receipt feature
- Two-step validation procedure available to check time calculation and approval status—compare actual time registered to planned time

- Configure registration forms
- Password specification possible on validation

The module also includes 50 Shop Floor Employee Records.

Benefit statement:

Shop Floor Control I helps you accurately and inexpensively track employee attendance patterns.

Key question:

Does your human resources department sometimes get into disputes with employees over attendance issues?

Prerequisite: Financials I

SHOP FLOOR EMPLOYEE RECORDS

Shop Floor Control I provides a license for 50 employee records. By licensing additional shop floor employee records, you can register additional employees in the shop floor employee table, so the activities of those employees can be tracked by the Shop Floor Control suite. Additional records are available in these configurations:

- Each, for records from 51–100
- Each, for records from 101–250
- Each, for records from 251–500
- Each, for records from 501–1500
- Each, for records greater than 1500

Prerequisite:

Shop Floor Control I

SHOP FLOOR CONTROL II (JOB REGISTRATION)

When a production order is scheduled or project activities are created, a number of jobs are created on the shop floor to support the collection and posting of time and quantity on these production orders and project activities. Shop Floor Control II in Microsoft Dynamics AX registers the time and resources used, and the items created, for each job. This data can then be transferred to Production or Project for analysis of actual costs of the items produced.

- Register jobs by time and units
- Bundle jobs together so the same employee can work on several jobs simultaneously
- Create a team function by appointing a "pilot" or team leader to register information on behalf of a team of employees
- Register machine time
- Register nonproductive time
- Integrate with the production and project modules
- Quantity feedback on production orders with use of multiple error causes, integrated picking list update and validation on quantities
- Track progress of ongoing jobs, and simulate completion time based on current progress

Benefit statement:

Shop Floor Control II can improve the efficiency of your shop floor operations with fast registration of real-time production information. The module can also give you an overview into expected completion times of ongoing jobs, and all data can be transferred to Production or Project for further analysis. The information also creates an entry in the general ledger.

Key question:

- Do you lack insight into all the jobs and processes taking place on your shop floor?
- Do you have the information you need to calculate the actual costs of your products?
- Do you wish to avoid unnecessary paperwork on production orders or projects?

Prerequisites:

Shop Floor Control I and either Production II or Project I

SHOP FLOOR CONTROL III (PAYROLL GENERATING)

Shop Floor Control III in Microsoft Dynamics AX uses the data collected in Shop Floor Control I and II to generate payroll data, complete with pay types and rates. For each employee, the module calculates the hourly wage as well as all types of bonuses and premiums. The payroll data generated by this module can be exported to an external payroll system for output.

Shop Floor Control III

- Categorize payroll data into pay categories (standard time, overtime, break time, flextime, premiums, absences)
- Save flextime and overtime in a flex account
- Calculate overtime based on hours worked
- Track payment data for piecework jobs
- Set up payroll periods
- Employees can define if overtime should be paid or allocated as time off
- Specify pay for on-call duty
- Generate payroll statistics
- Payroll expenses can be allocated to individual production jobs and operations or to projects
- Payroll data is exported as a comma-separated file which can be read by virtually any external payroll system

Benefit statement:

Shop Floor Control III can automatically categorize pay items and generate detailed payroll data. It enables you to view statistics about your employees' pay and premiums for deeper insight into your shop floor processes.

Key questions:

- Do you spend too much time preparing the necessary data for the payroll system?
- Can you reliably track overtime and other non-standard hours worked by your employees?

Prerequisite:

Shop Floor Control I

Project Management

PROJECT II

Project II in Microsoft Dynamics AX provides advanced financial management of projects, such as fixed-price projects and investment projects. It also provides the work-in-process (WIP) posting of time and material projects and internal projects.

Large Contract Management

- Manage the finances of fixed-price projects or projects with a mix of fixed-price and time-and-materials components
- The solution presents different options for financially sound management of your fixed-price projects, such as recognizing costs and revenue at intervals in profit and loss (P&L) statements as the project progresses or upon project completion
- Capitalize costs of an investment project while in progress and eliminate the WIP value to a fixed asset, a ledger account, or as cost to a new project upon project completion

Work in Process Projects

- Create an estimate to control work in process (WIP) based on completed percentage or completed contract
- Periodically match cost and revenue in the same ledger period
- Accrue revenue on time of the cost, or alternatively move the cost to the time of the revenue by posting WIP to cost value or sales value
- Handle WIP on time and material, fixed-price, and investment projects
- Specify WIP accounts to collect transactions that don't affect the profit and loss statement during the course of the project
- Track projects that use WIP accounts and move transactions between WIP accounts and profit and loss accounts in the general ledger

Project Costs and Performance

- Calculate consumption on individual cost groups, such as hours spent or materials consumed on a given project, sub-project, or group of projects

Posting

- A choice of 14 posting principles can be applied to internal, time and material, and fixed-price projects
- The principle applied to a given type of project can be applied to all projects of that type
- Control types can be set so employees can enter data only for categories or projects that are relevant to their jobs

Benefit statement:

Project II gives you an overview of your work in process on projects. The solution helps take the guesswork out of fixed price and time and material projects by incorporating WIP principles that only affect the profit and loss statement in accordance with accepted accounting principles. You can measure the progress of your projects at any given moment, and compare your progress with goals according to time and budget.

Key question:

Can you book costs and revenue for your projects as they are in progress to help ensure you come in on time and budget?

Prerequisite:

Project I

Customer Relationship Management

SERVICE MANAGEMENT

Use Service Management in Microsoft Dynamics AX to plan, track, and analyze service operations to maximize efficiency, gain a complete overview of costs and revenue, and improve profitability for service operations.

Service Agreements

- Work with flexible templates, and quickly create detailed, multilevel agreements
- Define tasks and frequency for service calls
- Link agreements to projects in Project for advanced pricing and accounting possibilities
- Tailor agreements to a wide range of customer requirements and payment arrangements

Service Objects

- Register objects such as machines or equipment to be serviced
- Quickly link object forms to service agreements
- Maintain and access detailed spare part replacements over the lifetime of an agreement

BOM Templates

- Create accurate default structures of parts replacement with bill of material (BOM) templates for object subcomponents

Service Orders

- Set up service orders to be created manually or automatically at periodic intervals from a service agreement
- Define individual service calls and register the actual work done by field service technicians
- Track incoming or planned service requests for each service visit
- Record service, technical, and staff hours; expenses incurred; items consumed; and fixed fees payable

- Record and invoice hours, expenses incurred, items consumed, and fixed fees payable
- Plan in advance item requirements and help ensure that stock is available for service operations

Benefit statement:

Service Management streamlines the process of creating and maintaining a wide range of service agreements, and it enables you to transform information about your services into profitable insight. Tight integration with Project in Microsoft Dynamics AX helps you track exact costs for service orders, manage invoicing, and handle multiple revenue models based on resource consumption or periodic payments.

Key questions:

- Does your business management solution enable you to run your company's service-related operations as a business, by tracking service operations in detail?
- Are you able to track key service operations and tasks easily and effectively, even for services you provide that are tailored for individual customers or that occur on a non-regular basis?

Prerequisite:

Project I

Repair Management

- Customer service personnel can register repair tasks grouped with standardized conditions and symptoms
- Service technicians can track the diagnosis and record the resolution of repair tasks
- Service managers can evaluate histories to identify faulty products, problem resolution issues, and future customer needs

Integration with Project

- Accurately track costs and revenues, manage invoicing, and handle multiple revenue models all from within Project

- Analyze service operations, budgeted versus actual expenses, and customer requirements to determine service needs and profit or loss associated with the service engagement

Integration with Microsoft Office Outlook

- Create service tasks and appointments within Outlook to enable remote or offline access
- Automatically update information entered in Outlook across Microsoft Dynamics AX

SERVICE SUBSCRIPTION

Use Service Subscription in Microsoft Dynamics AX to create and process service subscriptions for businesses that offer fixed-price service over a period of time.

- Accommodate revenue based on fixed or irregular periods and multiple price arrangements and adjust for reduction days and price increases
- Set current and future pricing based on prices that can be indexed
- Run Service Subscription independently or as a part of Service Management

Benefit statement:

With Service Subscription, users can create, process, post, and invoice service subscription transactions. Tight integration with Project in Microsoft Dynamics AX enables users to tap into that module's ledger integration, time and material invoicing, and reporting system functionality.

Key questions:

- Do you have a warranty service?
- Are you able to leverage key processing information—such as time and material invoicing—to help you effectively manage your service subscription transactions?

Prerequisite:

Project I

Human Resource Management

HUMAN RESOURCE MANAGEMENT III

Human Resource Management III in Microsoft Dynamics AX can give your human resource professionals an overview of your resources and identify potential skill gaps in your organization. Course administration tools help your human resource staff administer training opportunities within your organization.

Employee Development

- Personal development plan with activities and deadlines
- Periodic interview management
- Book or transfer appraisal interviews from Microsoft Dynamics AX to Outlook

Competence Management

- Graphical tools for skill-gap analysis
- Skill-gap analysis based on job profiles
- Skill searches support filtering and weighting of skills

Course Administration

- Register course details, instructors, participants, and locations
- Manage training agendas, tracks, and sessions
- Link course completion and CV or résumé information
- A participant list captures participants' training history
- Reports for waiting list, confirmation, and certificates

Note that Human Resource Management I and II are available through additional components that appear later on the Microsoft Dynamics AX price list.

Benefit statement:

Human Resource Management III enables your employees to define challenging and compelling career goals that align with the company's business strategy. Employees, their managers, and the human resource department can then view these agreements and evaluate progress in a continuous dialogue.

Key question:

Do you have enough information to drive the strategic aspects of your employees' and organization's development?

Prerequisites:

Human Resource Management I and II

Workspace Collaboration

MICROSOFT DYNAMICS CLIENT FOR MICROSOFT OFFICE AND SHAREPOINT SERVER

Microsoft Dynamics Client for Microsoft Office and SharePoint Server extends the power, insight, and process control of Microsoft Dynamics AX to all your employees, helping increase individual productivity and drive business success. The package consists of a number of self-service applications, such as Microsoft Dynamics Snap, Enterprise Portal, and FRx® WebPort and FRx DrillDown Viewer™ that can simplify access to business information and help connect employees closely with their company's business processes. There are two versions of the package: a premium version that includes Microsoft Office SharePoint® Server 2007, and a standard version that is based on Microsoft Windows SharePoint Services and Microsoft Office client integration.

Also included in this new offering are licensing rights for customers or industry partners to build their own Office Business Applications, a new category of programs where Microsoft Office becomes the front end for accessing the back-end business management functionality of Microsoft Dynamics AX.

Both the premium and standard versions include the following ways for employees to access their Microsoft Dynamics AX application:

Portals

- Tailored for specific roles, Microsoft Dynamics portals provide Web-based access for employees to interact with Microsoft Dynamics AX
- The Employee Role is included with the Enterprise Portal, which enables employees to view a phone book, view a department list, view and update personal information stored by human resources, and view advertised training courses, while managers can view and update the results of annual appraisal interviews

Microsoft Dynamics Snap

- Microsoft Dynamics Snap applications enable employees to use the Microsoft Office applications with which they are most familiar to interact with Microsoft Dynamics AX data
- For example, employees can look up business data from within Outlook or Excel, such as a customer invoice amount that relates to an e-mail message they are writing, or to a spreadsheet on which they are working

FRx

- Using Microsoft FRx WebPort and DrillDown Viewer, managers can get quick access to financial data for their department, and have drill-down capability to get supporting detail if they need it, all without having to go into the General Ledger or use up network resources

Windows SharePoint Services

- Windows SharePoint Services 3.0 is used as the platform on which the Microsoft Dynamics AX Enterprise Portal is built
- Windows SharePoint Services can be used to create additional team sites where people can collaborate on projects and documents
- Windows SharePoint Services is also a prerequisite for Office SharePoint Server 2007, which uses a number of its components including the workflow engine, site management, and security model

Microsoft Office SharePoint Server 2007

- With Office SharePoint Server 2007, all of a company's business data can be searched from one place, whether it is stored in Microsoft Dynamics AX, in a SharePoint site, or in e-mail
- The SharePoint Report Center provides a place to centrally store and manage all of an organization's reports, in whichever format they were created
- Office SharePoint Server 2007 includes built-in workflow capabilities so tasks can be created for employees, such as document approval, and forms or documents can be sent out automatically based on the completion of predefined steps
- Office SharePoint Server 2007 provides a platform on which team sites can be built, business content managed, or KPIs and dashboards created, all based on the specific needs of a business

Benefit statement:

Microsoft Dynamics Client for Microsoft Office and SharePoint Server provides a range of self-service applications that help extend the power, business insights, and process control of Microsoft Dynamics AX to all employees in a company.

Key questions:

- Do you want to make the critical business information and process control that are managed by Microsoft Dynamics AX available to many more employees across your company, via a simple user interface and at low cost?
- Do you want to improve the decision-making ability of your employees by enabling them to use self-service applications built in the Microsoft Office system and Office SharePoint Server 2007 as a front end for Microsoft Dynamics AX business management functionality?

Prerequisite:

Base Package

ENTERPRISE PORTAL FRAMEWORK

Enterprise Portal Framework in Microsoft Dynamics AX enables your customers, vendors, business partners, and employees to directly access relevant business information and conduct transactions with Microsoft Dynamics AX through personalized, role-based Web portals.

Enterprise Portal Platform

- Simple, browser-based user interface and intuitive controls help employees understand and use Enterprise Portal with little or no training
- Supports intranet for internal employees and extranet for business-to-consumer or business-to-business communication
- Delivers Microsoft Dynamics AX business data and business logic in real time
- Enterprise Portal functionality can be developed using the standard MorphX development environment
- Rapid deployment using Web site wizard
- The multilanguage and multicurrency functionality of Microsoft Dynamics AX is also available to remote users through Enterprise Portal
- Users can customize their Web portal to display their own language
- The system builds a searchable index so users can run back-office data searches
- Incorporate content from various information sources, including other back-office and front-office systems, using Web Parts and XML
- Category browsing enables easy drill-down of business data
- Richer content and document management
- Integrated collaboration

Advanced Functionality

- Access the advanced functionality of Microsoft Dynamics AX (such as Product Builder, ATP, CTP)
- Access third-party data via XML

Role and Permission Management

- Individual users can personalize their Web portal to display the controls,

functionality, and information they need to do their job

- Administrators use roles to personalize the structure, information, and functionality of Web portals, so users will see only the information and functionality designed for them (see roles sections for Enterprise Portal below)
- All activities leverage the existing Microsoft Dynamics AX business logic

Preconfigured Roles Available

- Employee role
- Sales representative role
- Customer role
- Vendor role
- Consultant role

Benefit statement:

Enterprise Portal Framework opens your business to your customers, vendors, employees, and other business partners 24 hours a day, every day. Remote users can access your business through an easy-to-use Web portal to get the information and functionality they need. With the framework, you can increase the speed of doing business while driving down costs.

Key question:

Can your customers, business partners, and remote employees access your business anytime?

Prerequisites:

Enterprise Portal Web Users and .NET Business Connector

EMPLOYEE ROLE

The employee role connects Enterprise Portal users, including remote users, to employee information that helps them do their jobs. Users in different time zones can access their personalized information over the Internet whenever they need to—not only during business hours.

Employee Role

- View a phone book
- View a department list
- View and update personal information stored by human resources
- Managers can view and update the results of annual appraisal interviews

Prerequisites:

Enterprise Portal Framework and .NET Business Connector

- Internal training courses can be advertised across the company
-

SALES REPRESENTATIVE ROLE

The sales representative role connects sales teams to the business information they need over the Internet, regardless of the time or their location. Whether sitting at their desks, at home, or on the road, sales representatives can easily access, view, and update customer and company information stored in Microsoft Dynamics AX. The sales office can be open 24 hours a day, seven days a week, at low cost.

Sales Representative

- View and maintain your business relations and contacts
- Create quotations
- Create sales orders
- Perform price inquiries
- View various reports like price list, price list per customer, sales by customer, region, sales this week, and more

Prerequisites:

Enterprise Portal Framework, Trade Agreements, Logistics, Project I (optional), and .NET Business Connector

CUSTOMER ROLE

The customer role helps companies connect and interact with their customers using the Web. Use the tools in this role to rapidly implement e-commerce Web sites for selling your products and services over the Internet. The role is connected to other areas of functionality in Microsoft Dynamics AX, including the Sales Management and Marketing Automation modules, and Supply Chain Management. Information such as product availability is automatically generated and will always be up to date when customers view the site.

Customer Role

- Sign up as a customer
- Look in the product catalogue
- Answer a survey or respond to a campaign survey
- View your account, purchase orders, and invoices

Prerequisites:

Enterprise Portal Framework, Logistics, and .NET Business Connector

VENDOR ROLE

The vendor role enables you to exchange item-specific documents, purchases, and shipping data with your vendor. Exchanging data on a shared Web site cuts down on phone calls, faxes, and e-mail messages, as well as manual errors due to multiple data entry. The vendor role helps you optimize your supply chain without an expensive technology upgrade. Your vendors can access your business information conveniently, using only a standard Web browser.

Vendor Role

- View and change company-specific information
 - Vendors can change existing contacts and create new ones
 - Vendors can view and, if desired, make limited edits to each purchase order with your company
 - Vendors can view details about all the items they deliver to your company, and can add external descriptions and external item numbers
 - View details of the journals selected
- Vendors can update list prices of their items
 - Vendors can see a list of open receipts
 - A supply performance function shows how vendors perform with on-time delivery, average days late, backorder status, and average lead time

Prerequisites:
Enterprise Portal Framework, Trade Agreements, and .NET Business Connector

CONSULTANT ROLE

The consultant role simplifies and streamlines the registration of hourly costs for projects in Microsoft Dynamics AX. Consultants, external partners, and remote project-basis employees can log their working hours over the Internet. Registration is simple and direct, and consultants can choose from flexible time registration options to match the type of project they're working on.

Consultant Role

- Timesheet registration on projects
 - Access anytime, anywhere, through a browser and Internet connection
 - View invoiced transactions and invoice proposals
 - View transactions for hours, costs, revenue, item, and on-accounts
- Review hour statements for projects
 - Inquire about customers, projects, and inventory information

Prerequisites:
Enterprise Portal Framework, Project I, and .NET Business Connector

QUESTIONNAIRE FOR ENTERPRISE PORTAL

With this module, you can select a questionnaire you designed in Questionnaire I in Microsoft Dynamics AX, and deploy it on a Web page over the Internet. Whether reaching out to customers, vendors, employees, or other business partners, all participants only need a Web browser and Internet connection to view and respond to your questionnaire.

Questionnaire for Enterprise Portal

- Deploy questionnaires easily over corporate intranets and external Web sites
- Respondents can answer surveys over the Internet and view their own answers and evaluations afterwards
- Administrators can view completed questionnaires over the Internet and drill down to specific responses

Prerequisites:
Enterprise Portal Framework and Questionnaire I

HUMAN RESOURCE MANAGEMENT FOR ENTERPRISE PORTAL

Human Resource Management functionality for Enterprise Portal can connect your employees and your human resources department in a virtual online community. Whether they sit down the hall from one another or in different departments, subsidiaries, or countries, employees can easily view and update personal information stored by human resources, and managers can maintain employee records remotely. Empowering employees with responsibility over their own data saves your human resource professionals time and effort. Users in different time zones can access their personalized information over the Internet whenever they need to—not only during business hours.

Access to Employee Services

- View line, matrix, and project organization, and position information
- Users can view and maintain their own personal information
- View and create emergency contacts

Prerequisites:
Employee Role, Human Resource Management I, Human Resource Management II (optional), Human Resource Management III (optional)

Access to Manager Functions

- View and update personal information about your team members

PRODUCT BUILDER FOR ENTERPRISE PORTAL

By launching the functionality of Product Builder in Microsoft Dynamics AX over a Web site, your customers can easily create their own products from home or the office via the Internet. After selecting the desired values for the product, the customer or vendor is presented with options such as price calculation or adjustment of configuration details. Customers can submit multiple orders and vendors can monitor the production status or view an expected date of delivery all over the Web.

Product Builder for Enterprise Portal

- Your customer can configure products over the Internet using your pre-selected product models
- Available as an add-on to the Customer Role for Enterprise Portal
- Uses the same user dialog as when configuring the item via the sales order

line from the Windows client of Microsoft Dynamics AX

Prerequisites:

Customer Role, Product Builder I, and Web MorphX Development Suite

PERFORMANCE MANAGEMENT FOR ENTERPRISE PORTAL

With this module you can view output from the Balanced Scorecard in Microsoft Dynamics AX module. Users can view their performance through different perspectives by drilling down to specific key performance indicators (KPIs). They can also get a graphical output of performance for easy visualization.

Performance Management for Enterprise Portal

- Users can view their performance related to past KPIs and their progress towards current KPIs
- View strategic plans linked to KPIs
- Make online calculations of performance data (for example, to look at average performance over time)

- Use online visual cockpits to drill into performance information to a specific management group

Prerequisites:

Employee Role and Balanced Scorecard

ENTERPRISE PORTAL WEB USERS

Enterprise Portal Web Users can be thought of as “casual” users. These users access Microsoft Dynamics AX through a Web browser for occasional work with the solution. They are given a customizable, user-centric, and task-oriented interface that delivers only the functionality required by their role, and most tasks are accomplished using wizards. Because of the Web browser interface, they can use Enterprise Portal to access the solution at any time, from anywhere in the world.

It is common for a company to license a number of Microsoft Windows users, who work with the system often, and also a number of Enterprise Portal Web users, who can work inside or outside the company grounds and who access the solution less frequently. See Enterprise Portal Roles for more information about Enterprise Portal Web Users.

Benefit statement:

Broaden access across the enterprise with a customizable, user-friendly interface that can be tailored to meet individual needs.

Key questions:

- Do you have employees who need to work with Microsoft Dynamics AX from remote locations, where they may have access to only a Web browser?
- Do all your employees need to access all Microsoft Dynamics AX functionality all the time, or does it make more sense to deliver a limited subset of functionality to casual users based on their role?

Prerequisites:

Enterprise Portal Framework and .NET Business Connector

APPLICATION INTEGRATION FRAMEWORK

The Application Integration Framework (AIF) in Microsoft Dynamics AX provides an extensible framework that supports multiple asynchronous transports, as well as synchronous transport using Web services or other transport methods, to reliably exchange documents in XML format with trading partners or other systems. An exchange starts with a document, that is, a document class defined using Microsoft Dynamics AX business logic. The document is serialized into XML and header information is added to create a message, which may then be transferred into or out of your Microsoft Dynamics AX solution.

An asynchronous exchange uses an adapter to convert the document into the proper format for exchange by means of a particular transport mechanism, such as Microsoft Message Queuing (also known as MSMQ). Adapter-based exchanges are asynchronous in that they involve moving the document into a queue where it waits for processing by a Microsoft Dynamics AX batch job. Adapters handle the following types of exchanges:

- **Send Documents**—Microsoft Dynamics AX sends documents to another system
- **Receive and Create Documents**—Microsoft Dynamics AX receives documents from another authorized system and creates new records in the Microsoft Dynamics AX database
- **Respond to Read and Query Requests**—Microsoft Dynamics AX receives requests for documents from another authorized system, retrieves the requested information (whether a document or a list of documents) from the Microsoft Dynamics AX database, and returns it to the requesting system, with appropriate filtering and security

Benefit statement:

The Application Integration Framework can help businesses support document exchange with customers, vendors, and other partners.

Key questions:

- Does your company need to exchange documents and business data with customers and suppliers to improve the efficiency of your business?
- Do you need to create new electronic documents frequently, and do you require support of a system that provides many electronic document formats right out of the box?

Prerequisites:

Trade, Enterprise Portal Framework and one Microsoft Dynamics AX Business Connector. BizTalk Server 2006 may be required for some installations.

WEB SERVICES

Web Services in Microsoft Dynamics AX are programmatic interfaces that can facilitate application-to-application (A2A) communication between a business and its external trading partners. The Application Integration Framework (AIF) includes support for Web services that are exposed to trading partners (known as inbound Web services) as well as an adapter to specify documents and use Web services exposed by other trading partners (known as outbound Web services).

Benefit statement:

By using AIF to expose Web services to external trading partners, you can increase the efficiency of your supply chain by enabling trading partners to create, update, read, delete, or query for records in the Microsoft Dynamics AX database. For example, an external trading partner can access your price list or can create a sales order with your company remotely on demand over the Internet.

Key questions:

- Is your company looking for ways to communicate more effectively with trading partners?
- Do you need to increase the efficiency of your transactions with trading partners?

Prerequisite:

Application Integration Framework

SHOP FLOOR CONTROL FOR ENTERPRISE PORTAL

The Shop Floor Control Time Card for Enterprise Portal uses the Enterprise Portal Framework to provide employees access to the electronic time card features in Shop Floor Control. Employees can register time on activities through the portal.

Prerequisites:

Shop Floor Control and Enterprise Portal

Configuration and Development

WEB MORPHX DEVELOPMENT SUITE

With Web MorphX Development Suite in Microsoft Dynamics AX, developers can create Web applications based on online data and the same business logic that is in the ordinary Microsoft Windows interface of Microsoft Dynamics AX. You can develop Microsoft Dynamics AX Web applications for different devices, including browsers and mobile and handheld devices. A Web site wizard helps you deploy your Web applications easily.

MorphX Development Tools (Web)

- Drag Microsoft Dynamics AX elements from the AOT to Web projects

Multiple Information Sources

- Support for Web parts—this enables content and functionality from a wide range of sources to be embedded in user Web pages, for example Outlook, MSN® Business News, and much more

Benefit statement:

Web MorphX Development Suite expands the reach of your Microsoft Dynamics AX solution by developing applications that your employees, customers, and business partners can access anywhere by using a normal Web browser or mobile and handheld devices. The Web development tools are all based on the same principles and concepts as the MorphX Development Suite for Microsoft Windows, so developers already familiar with MorphX can easily begin developing Web applications for Microsoft Dynamics AX.

Key question:

- Can you develop and deploy customized applications over the Web to your company's Microsoft Dynamics AX users, which deliver content and functionality from your Microsoft Dynamics AX solution or from other sources?

Prerequisite:

MorphX Development Suite for Microsoft Windows

Other Advancement Management Enterprise Functionality

BALANCED SCORECARD

Balanced Scorecard gives you the power to define key performance indicators (KPIs) to track almost any measurable aspect of your business. With KPIs, you can evaluate your overall business performance and measure fulfillment of business goals.

Objectives and Measurements

- Identify objectives for each scorecard and create the measures used to make a quantitative calculation of performance, so you can use your overall goals and measures to determine how the objectives are calculated

Perspectives

- View the strategy from different perspectives such as financial, customer, internal, learning, and growth, and identify strategic objectives for each perspective

Data Link

- Measure data from non-Microsoft Dynamics AX sources

Knowledge Account Plan

- Create a structure and overview of your Balanced Scorecard
- Set up KPIs
- Compare KPI targets to actual KPI results
- Group business information within different perspectives, such as “customers,” “internal processes,” “organization,” and “financial”
- Link KPIs to organizational units through Human Resource Management I in Microsoft Dynamics AX

Measurements

- Use a measurement wizard to easily query on data and define KPI measurements
- Link your KPIs to data manually, from within Microsoft Dynamics AX, or from an external data source

Calculations

- Use built-in tools to help you define and control the consistency of your methods when designing KPIs

Periodic Measurements

- Define how often you want Microsoft Dynamics AX to run automatic measurements and reporting
- Simulate future KPI results using different performance scenarios

Reporting and Statistical Analysis

- Customize the graphical presentation of each KPI
- Target performance information toward a specific management team by selecting specific KPIs for specific team members

Enterprise Portal Integration

- Open Balanced Scorecard capabilities to a wider audience inside your company with scorecard overview, graphical statistics, and drill-down facilities in the Enterprise Portal module

Cockpits

- Make individual scorecards and objectives available for selected users or user groups with cockpits

Benefit statement:

Balanced Scorecard helps you monitor and optimize your business performance by using KPIs. By comparing your results to the KPIs set by your business plan, you can take immediate action to fine-tune your operations and processes.

Key questions:

- Do you know at any given moment where your current business is compared to the goals you've set?
- Does your company have a consistent, objective method of analyzing performance information?

Prerequisite: Financials I

BUSINESS PROCESS MANAGEMENT

You can use Business Process Management in Microsoft Dynamics AX to analyze strengths, weaknesses, opportunities, and threats (SWOT analysis), and to create a strategy. Best practices templates help you define actions and processes that are aligned with the overall strategy.

Strategic Planning

- Create a strategic plan, step by step
- Identify status and end results
- Register SWOT analysis results
- Break down visions to define goals and milestones
- Plan and follow up with actions on initiatives
- Link to action management and KPIs in Balanced Scorecard
- Define templates for strategic plans
- Link strategic plans to organizational units in Human Resource Management I

Action Management

- Use detailed information about responsibilities, time, priorities, and status
- Register actions
- Track responses to actions and how different actions are related
- Structure responses and generate derived actions
- Send actions as an e-mail message, or create as tasks in Outlook
- Implement process design by using action templates
- Create actions with action planning, and distribute to the responsible people

Benefit statement:

Business Process Management helps you define a strategy, and then assign actions that support the strategy to individual employees. With these tools, you can help focus every member of your organization on your business plan and strategic goals.

Key questions:

- Do you have clearly defined processes and action plans in your company that are tightly linked to your overall strategy?
- Do you have a tool that tracks the progress and fulfillment of your business plan, action by action?

Prerequisites:

Financials I and Human Resource Management I

QUESTIONNAIRE I

Questionnaire I in Microsoft Dynamics AX provides integration to sales and marketing functionality. You can design a questionnaire as part of your human resources procedure, to support Customer Relationship Management (CRM) processes, or to coach telemarketing personnel. You can also send the questionnaire to a target group as part of a campaign, and collect responses over the Web.

Design and Execution

- Design and deploy surveys rapidly
- Deliver instructions to individual questions along with the questions
- Each question is linked to an answer mode identified by text, date, or numeric value, or to an answer collection defined by the questionnaire administrator
- Enable free-text answers to any type of question
- Openly define response options
- Deliver questions sequentially or in random order
- Indicate the percentage of questions in a specific questionnaire that need to be answered in order to obtain a valid result
- Accompany questions with media such as pictures, audio, or video
- Design a question with subquestions
- Manage access control and user profiles

Scheduling

- Easily schedule employees and other individuals engaged in surveys
- Mail correspondence with all respondents before, during, and after response
- Track respondents and responses online

Result Management

- Advanced statistical analysis tool supports calculation, variance, and standard deviations
- Use integration with Excel to view statistics about individuals including age, geography, and more

Reports and Questionnaire Analysis

- Get a response history by questionnaire and individual
- Get a result report, answer report, and "wrong answers" report

Testing with Questionnaires

- Test people's knowledge about virtually any subject, and set up parameters for passing the tests
- Allocate points based on the number of questions answered correctly or whether a certain number of points was achieved (either as numbers or percentages)

Benefit statement:

Questionnaire I is a powerful tool for designing, constructing, and analyzing surveys that help you get feedback from employees, customers, managers, and other business contacts. You can use Questionnaire I to help qualify your leads by getting more information from prospects, while keeping existing customers separate. Responses are saved in the system, so you can run analyses on the stored survey results and make better surveys in future campaigns.

Key questions:

- Does feedback you receive from external surveys just disappear, or does your organization internalize what it learns?
- Is it a major burden on resources to design, deploy, and follow up on a survey?

Prerequisite:

Base Package

Optional:

Sales Management, Marketing Automation, Telemarketing, and Human Resource Management I

Questionnaire Web Portal

(This functionality is available in the Enterprise Portal Framework)

- Easy Web execution of surveys through Enterprise Portal
- View and analyze results online

satisfaction, feedback analysis, performance appraisals, course evaluations, job development dialogue, and more

- Use questionnaire tool for learning and guidance purposes

Sales and Marketing Integration

- Include a questionnaire as part of a campaign, and collect responses over the Web

Questionnaire and ERP in One

Cross-reference master data (typically demographic) from survey responses with data collected from actors already registered in your system (a customer, vendor, manager, or employee) without the respondent reentering the data

Human Resource Management Integration

- Implement survey for employee

QUESTIONNAIRE II

Questionnaire II in Microsoft Dynamics AX offers advanced distribution functionality that enables you to select a specific group of respondents and send them a link in e-mail to a questionnaire that is tailored for them. The module also helps you carry out advanced statistical calculations and get an overview of your feedback by viewing survey results graphically.

Scheduling

- Manage questionnaire planning
- Plan and distribute surveys to selected respondents, such as employees, applicants, business partners, course participants, networks, or organizations
- Mail correspondence to survey participants

Reports and Questionnaire Analysis

- Break down survey results by the demographics of respondents
- Display results graphically, with PivotTable views and pivot graphics

Benefit statement:

This module gives you the power to analyze survey results with past survey data, so you can get a 360-degree analysis of the market feedback your surveys provide.

Key questions:

- Do your company's survey methods enable you to reach individual groups of respondents with custom-designed questionnaires?
- Is it hard to grasp the meaning of the feedback you get from surveys because the data is difficult to visualize?

Prerequisite:

Questionnaire I



Additional Components for Business Essentials and Advanced Management

Microsoft Dynamics AX Business Essentials and Advanced Management customers can extend their solution by licensing a selection of additional components.

HUMAN RESOURCE MANAGEMENT I

Human Resource Management I in Microsoft Dynamics AX can store employee information and agreements, note the reasons for a resignation, and keep track of transfers between departments. Human Resource Management I includes the first 100 employee records at no additional cost. Additional employee records can be licensed in the initial implementation or added as your company grows. See the price list for details.

Core Human Resource Management

- Core human resource management administrative functionality
- Store payroll information, historical data, and job and position information
- Registration of employee benefits
- Manage items loaned to employees
- Manage and record actual employee skills
- Generate reports for follow-up, periodic reporting, and management decision support

Organization

- Manage line, matrix, and project organizations
- Maintain your organizational structure and create new business units
- Visual, function-oriented organizational charts

Benefit statement:

The framework of Human Resource Management I can be easily adapted to fit the specific needs of your business, so your employees can access exactly the data and information they need. With visual, function-oriented diagrams, you can view your organization in chart format.

Key question:

- Do your human resource employees spend too much time manually collecting and tracking employee information?

Prerequisite:

Financials I

HUMAN RESOURCE MANAGEMENT II

This module collects information regarding your company's recruitment process, including internal data such as job profiles and external-facing material such as recruitment correspondence and media responses. The module also helps you track absences and understand trends in absenteeism.

Organization

- Administer position groups and positions or jobs
- Create job profiles and describe roles and requirements

Recruitment

- Manage the recruitment process
- Automate correspondence through integration with Microsoft Office Word
- Copy interview appointments into Outlook
- Statistical overviews of the recruitment process
- Measure media response

Absence Management

- Define multiple absence categories
- Register absences individually and collectively
- Statistical and graphical presentation of absence data

Employee Development

- Conduct structured appraisal interview with employees
- Integrate with Outlook to book meeting times directly in attendee calendars
- Development planning capabilities help your employees define career goals that reflect business strategy

Course Administration

- Administer training courses by target groups, course identification, location, instructor and participants, and more
- Manage events; monitor agendas, tracks, and sessions
- Get an overview of the courses an employee has completed to help you review his or her skills and competencies

Benefit statement:

Human Resource Management II helps your human resources department learn from the experiences of previous recruitment campaigns and pinpoint the most effective media and methods for sharper, more effective recruiting messages. The module also helps human resources staff register and track statistics and trends on absences.

Key questions:

- Do your company's recruiting communications and processes lack consistency and take too many resources to execute?
- Do you have an overview of absenteeism across your organization, and can you identify and quantify reasons for and trends in employee absences?

Prerequisite:

Human Resource Management I

HRM EMPLOYEE RECORDS (MORE)

Human Resource Management I provides a license for 100 employee records. By licensing additional employee records, you can register additional employees in the human resource employee table, so the activities of those employees can be tracked by the Human Resource Management suite. Additional records are available in these configurations:

- Per block of 50 records from 101–250
- Per block of 50 records from 251–500
- Per block of 50 records from 501–1000
- Per block of 50 records from 1001–2500
- Per block of 50 records from 2500–unlimited records

Prerequisite:
Human Resource Management I



MICROSOFT DYNAMICS AX BUSINESS CONNECTOR

The .NET Framework is the Microsoft managed code programming model for Windows. The Microsoft Dynamics AX Business Connector is a .NET-enabled integration component for managed applications to access functionality in Microsoft Dynamics AX or to exchange application data and business information with the solution.

Microsoft Dynamics AX itself uses the Business Connector within Enterprise Portal and the Application Integration Framework. In addition, external applications can use the Business Connector to interact with Microsoft Dynamics AX. For example, Microsoft Office Excel or Microsoft Office Word users can access Microsoft Dynamics AX functionality by using the Business Connector to handle the data exchange. In the case of external applications, some extra code will need to be written to have the external application access the Business Connector.

Benefit statement:

Business Connector increases the connectivity of your entire business by enabling Microsoft or third-party applications to take advantage of the full functionality of Microsoft Dynamics AX.

Key questions:

- Do your company's business applications act like remote islands of functionality, with no way of taking advantage of each other's capabilities?
- Can your company's various business applications connect to and capitalize on the power of your business solution?

Prerequisite: Base Package

X++ SOURCE CODE

The X++ Source Code editor enables developers to create, view, modify, and delete the X++ classes that contain Microsoft Dynamics AX application source code. Methods can be copied from one element to another by using the drag-and-drop function. If developers need to create custom code, Microsoft Dynamics AX offers different functions to simplify their jobs and provide information about their options.

X++ Source Code has built-in runtime access for the VAR and BUS layer, and their associated VAP and BUP patch layers in Microsoft Dynamics AX (patch layers are additional application layers for handling patches, minor updates, service packs, hot fixes, and additional functionality). If the customer licenses X++, there is no need to license the BUS and VAR layer runtimes.

X++ Source Code

- Create, modify, and delete X++ classes
- Validate and monitor the functionality of your code with an integral X++ debugger

Benefit statement:

With access to the X++ source code, you can customize and extend the capabilities of Microsoft Dynamics AX to meet your exact business needs. The X++ Source Code editor in Microsoft Dynamics AX can reduce the time and costs involved with making system modifications, customizations, and upgrades. The X++ Source Code editor also enforces certain methods of writing code and developing system customizations. This can result in better code, fewer errors, and lower TCO.

Key questions:

- Do you have specific or unique business processes that need to be supported by a customized business solution?
- Are your current business applications too difficult and expensive to customize or upgrade because of obsolescent coding languages or development tools?

Prerequisite:

MorphX Development Suite for Microsoft Windows

MICROSOFT SQL SERVER RUNTIME

You may choose to license Microsoft SQL Server Runtime through the Microsoft Dynamics AX price list. Please see www.microsoft.com/sql/default.mspx for more information about Microsoft SQL Server.



Notes:

Microsoft

