

Microsoft Dynamics AX

# **Professional Services for Microsoft Dynamics AX 2009 Features and Enhancements**

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## *Overview*

Professional Services for Microsoft Dynamics® AX 2009 builds on its strong history and includes key architectural enhancements of Microsoft Dynamics AX 2009. This exciting release provides a greater level of control over project accounting practices and resources, and employs the familiar user interface of Microsoft® Office 2007 to improve usability and user acceptance.

This document describes the enhancements to Professional Services for Microsoft Dynamics AX 2009, which:

- Leverages the core enhancements of Microsoft Dynamics AX 2009.
- Expands on the legacy features and functionality of Professional Services for Microsoft Dynamics AX.
- Offers new product features and functionality.

## Leveraging Microsoft Dynamics AX 2009 Core Enhancements

Professional Services for Microsoft Dynamics AX 2009 takes advantage of the core enhancements of Microsoft Dynamics AX 2009 to simplify customization and bring a world-class professional services solution to the market.

### Familiar Microsoft Office–Like User Interface

Microsoft Office, one of the most commonly used suites of business productivity software available today, is designed to help you work quickly and easily. Professional Services for Microsoft Dynamics AX 2009 adopts the user-friendly interface of Microsoft Office 2007, and uses the Ribbon to place contextual, relevant tasks at your fingertips so that you can find what you need quickly.

#### *Benefit*

The familiar user interface of Professional Services for Microsoft Dynamics AX 2009 helps increase user acceptance and drive productivity while reducing training and support costs.

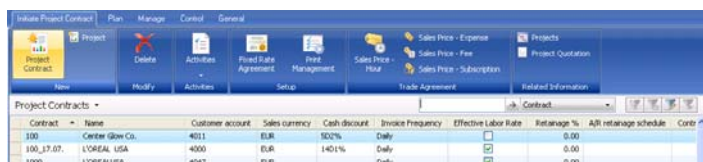


Figure 1. Use the Ribbon to navigate and complete daily tasks faster.

### List pages

Professional Services for Microsoft Dynamics AX 2009 offers two new List pages for Project Contracts and Projects.

#### *Benefit*

List pages streamline the overall presentation of items based on the category you choose, and put action items into logical groups for simplified navigation.

Contract	Name	Customer account	Sales currency	Cash discount	Invoice Frequency	Effective Labor Rate	Percentage %	A/R retorage schedule
100	Center Glen Co.	4011	EUR	502%	Daily		0.00	
100_17.07.	L'OREAL USA	4000	EUR	1401%	Daily		0.00	
1000	L'OREALUSA	4047	EUR		Daily		0.00	
1001	The Bub	4001	EUR		Daily		0.00	
1002	The Bright Idea	4002	DKK		Daily		0.00	
1003	Office Lights Inc.	4003	EUR	502%	Daily		0.00	
111	The Warehouse	4008	EUR		Daily		0.00	
18000	L'OREAL USA	4000	EUR		Daily		0.00	
200	The Warehouse	4008	EUR		Daily		0.00	
210	The Warehouse	4008	EUR		Daily		0.00	
20000	The Bub	4001	EUR		Daily		0.00	
222	Inter Company	4020	EUR		Daily		0.00	
300	Habitat	4009	EUR	704%	Daily		0.00	
400	National School Administration	4017	EUR		Daily		0.00	
4049	CRB	4049	EUR		Daily		0.00	
4051	Centennial Consulting, LLC	4053	EUR		Daily		0.00	
4053	Centennial Consulting, LLC	4053	USD		Daily		0.00	
500	Office Supplies Inc.	4005	USD		Daily		0.00	
501	L'OREAL USA	4000	EUR	1401%	Daily		0.00	
600	The Warehouse	4008	EUR		Daily		0.00	
900	Habitat	4009	EUR		Daily		0.00	
901	The Bub	4001	EUR		Daily		0.00	
902	The Bright Idea	4002	DKK		Daily		0.00	
903	Office Lights Inc.	4003	EUR		Daily		0.00	
904	The Specialist	4004	EUR		Daily		0.00	
905	Office Supplies Inc.	4005	EUR		Daily		0.00	
906	Furniture World	4006	EUR		Daily		0.00	
907	Office Design Inc.	4007	EUR		Daily		0.00	
908	The Warehouse	4008	EUR		Daily		0.00	
909	Karen Håkner	4026	USD		Daily		0.00	
910	The Lamp Shop	4010	EUR		Daily		0.00	
911	Center Glen Co	4011	EUR		Daily		0.00	
912	Luminaries Inc.	4012	CAD		Daily		0.00	
913	Northern Lights	4013	CAD		Daily		0.00	

Figure 2. Organize projects using List pages for contracts and other project data.

## Workflow

Microsoft Dynamics AX 2009 leverages the flexible Windows® Workflow Foundation to create business rules and custom workflows to automate business processes. Professional Services for Microsoft Dynamics AX provides the following workflow processes out-of-the-box:

- Project Request
- Fee-Based Wizard
- Timesheet—Adding Effective Labor Rate (ELR) to Enterprise Portal in Microsoft Dynamics AX or to the Microsoft Dynamics AX client
- Expense
- Quotation
- Budgets—Original/Revised
- Budgets—Forecast

## Benefit

The business process automation delivered by workflow reduces non-billable time, physical paper routing, errors, and invoice cycle times.

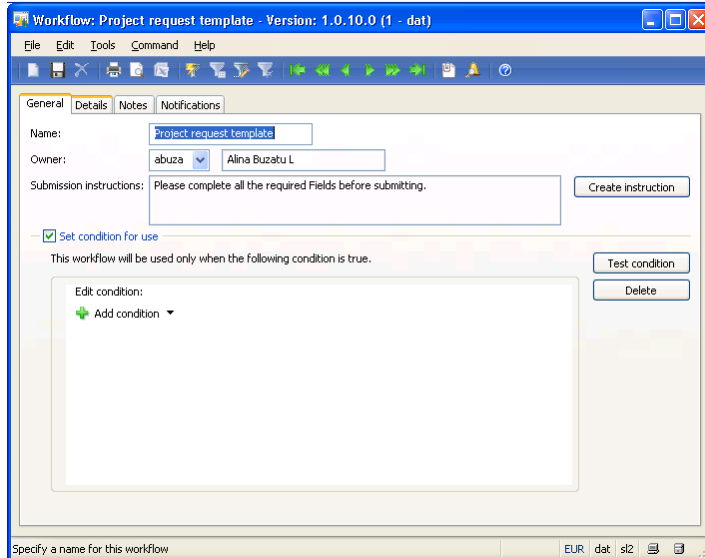


Figure 3. Improve process automation and set custom conditions using workflow.

## Enterprise Portal

Enterprise Portal in Microsoft Dynamics AX offers Web-based access to users at any location. Enterprise Portal leverages Microsoft .NET technologies to deliver new levels of design control and usability.

In Professional Services for Microsoft Dynamics AX, Enterprise Portal forms have been rewritten to the new .NET framework for an improved user experience. Additional core features have been made accessible on Enterprise Portal, including:

- Project Request
- Resource Scheduling
- Budgets—Original/Revised
- Budgets—Forecast

## Benefit

By providing more core functionality in Enterprise Portal, Professional Services for Microsoft Dynamics AX 2009 increases accessibility for remote and mobile users and reduces reliance on the Microsoft Dynamics AX client.

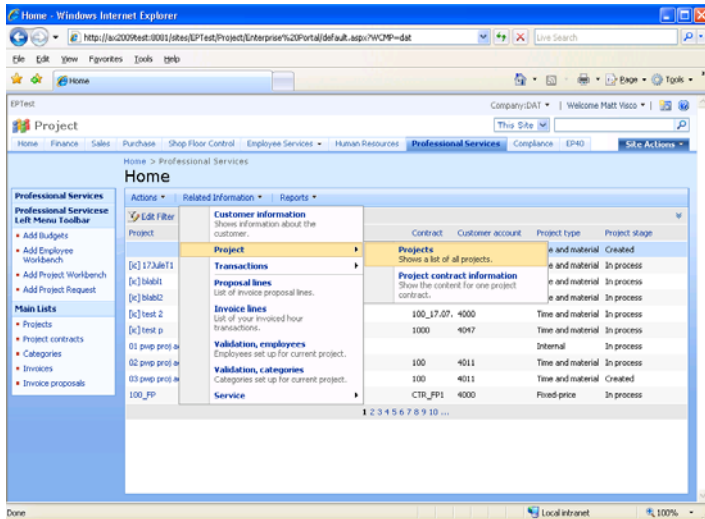


Figure 4. Use Web-based access to extend the solution to mobile and remote employees.

## Role Centers

Role Centers in Microsoft Dynamics AX 2009 present real-time information, such as tasks, key performance indicators (KPIs), and other data that is relevant to your role within the organization. Professional Services for Microsoft Dynamics AX 2009 enhances several Role Centers that are delivered out-of-the-box with Microsoft Dynamics AX. You can access Role Centers from the Microsoft Dynamics AX client or via the Web using Enterprise Portal in Microsoft Dynamics AX.

### Benefit

Role Centers improve productivity by providing quick access to the critical data, reports, and tasks you need.

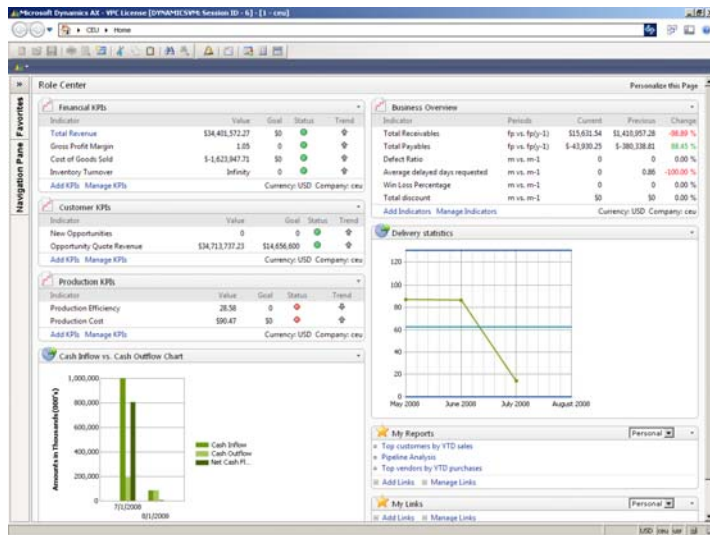


Figure 5. Access relevant tasks and information from your Role Center.

## Enhanced Features in Professional Services for Microsoft Dynamics AX 2009

Professional Services for Microsoft Dynamics AX 2009 offers several enhancements that build on the strong foundation of Professional Services for Microsoft Dynamics AX to serve the unique needs of professional services organizations and their customers. These enhancements provide new levels of project and contract execution and control to users and administrators.

### Activity Breakdown Structure (ABS)

Professional Services for Microsoft Dynamics AX 2009 enhances the base project functionality of Microsoft Dynamics AX by offering complex visualization structures and the ability to create scheduling templates. The Activity Breakdown Structure (ABS) provides:

- An Activity Template that includes Resource Scheduling information.
- A more robust tree presentation.
- An Activity Breakdown Structure inquiry to allow for management of a project from an activity perspective.

### Benefit

The Activity Breakdown Structure provides a complex execution structure that runs parallel to the cost control structure to help you set up projects quickly and consistently.

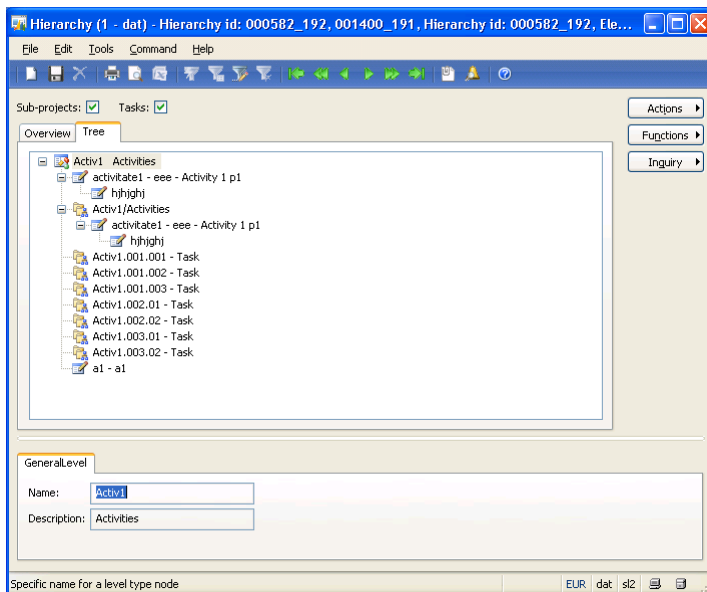


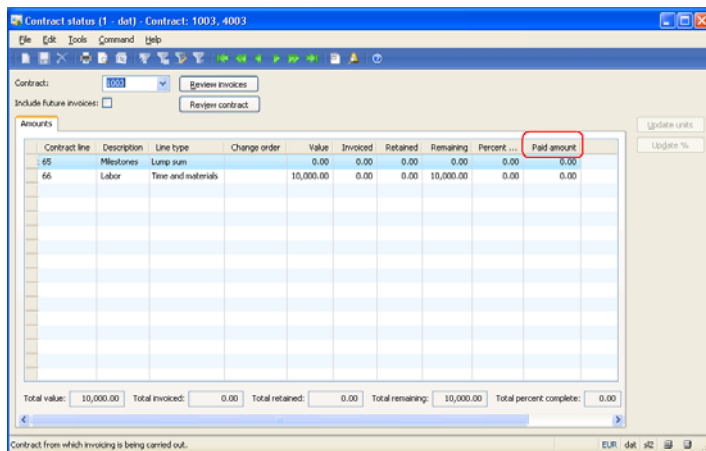
Figure 6. Quickly create templates at multiple levels to speed project creation.

## Contract Lines Status—Paid Amount

When monitoring the status of a contract, in addition to the amount that has been invoiced, it is important to know the amount that has actually been paid. Professional Services for Microsoft Dynamics AX 2009 adds a Paid amount column to the existing Contract Status form that displays the actual amount that has been received.

### *Benefit*

With the Paid amount column in the Contract Status form, you can easily identify the actual amount that has been received. When the Pay When Paid feature is selected, the Paid amount triggers an automatic payment to vendors and subcontractors.



Contract line	Description	Line type	Change order	Value	Invoiced	Retained	Remaining	Percent...	Paid amount
65	Milestones	Lump sum		0.00	0.00	0.00	0.00	0.00	0.00
66	Labor	Time and materials		10,000.00	0.00	0.00	10,000.00	0.00	0.00

Total value: 10,000.00 Total invoiced: 0.00 Total retained: 0.00 Total remaining: 10,000.00 Total percent complete: 0.00

Figure 7. Use the Paid Amount column to view current payment status.

## Project Requests

It is often necessary to evaluate the merits of a project before it can commence. This involves capturing the details of the project and then routing this information to the appropriate people for approval. Project Requests provides the functionality needed to support this business requirement and serves as the “gateway” to the new Project Quotation.

For billable projects, Project Requests can also contain one or more Project Quotations to provide additional details.

### *Benefit*

With the Project Requests feature, you can create a request for a project to initiate and track the progress of information gathering and subsequent approvals. You can start by adding basic information, and then

add to the request as more information is known, such as prospect or client data, potential billing method, and the estimated cost, revenue, and margin.

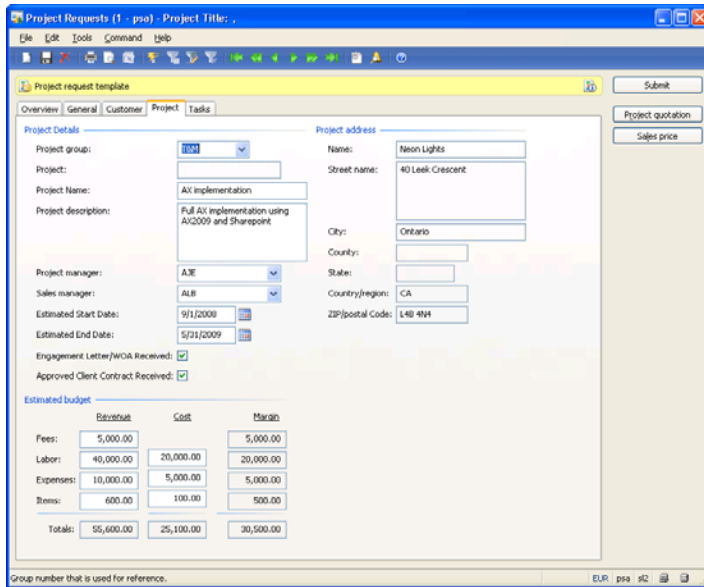


Figure 8. Track project status, including current budget, using Project Requests.

## Price Group Search—New Price Search Capability

Some companies have pricing structures that are different from the standard pricing models most professional services companies use. Professional Services for Microsoft Dynamics AX 2009 adds a new data element to the pricing table to support user-defined price groups. This enhancement enables you to define prices that are outside of the otherwise fixed structure of customer, contract, category, resource group, project, or employee—offering greater flexibility in defining rates and potentially reducing table maintenance.

### Benefit

The Price Group Search feature gives you greater flexibility to define ad-hoc pricing models that fit your business without the need to customize the pricing table.

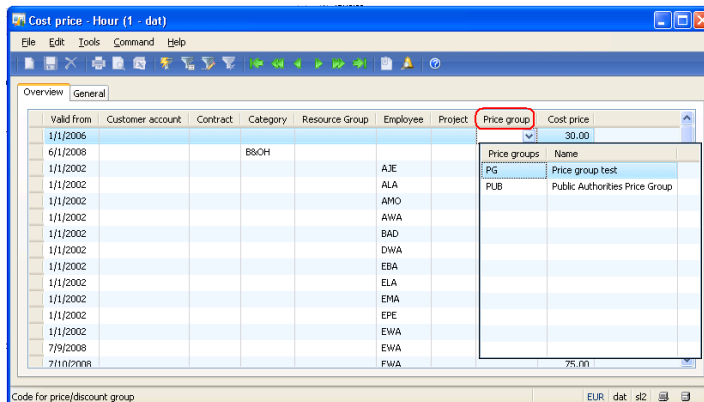


Figure 9. Easily extend search capabilities for ad-hoc pricing models.

## Revenue Recognition

Managing revenue is a critical function for any organization. Professional Services for Microsoft Dynamics AX 2009 has enhanced the existing Revenue Recognition capabilities for tighter control and faster processing. A Revenue Recognition wizard speeds the process by proactively searching the system and proposing potentially recognizable revenue. Some of the new features of include:

- Enhanced performance, such as batch processing and faster querying.
- New adjustment features, including the ability to adjust transactions before revenue is recognized and thereby helping to reduce revenue recognition errors.

### Benefit

Revenue Recognition simplifies revenue-related processes and improves accuracy for adjusting and recognizing revenue.

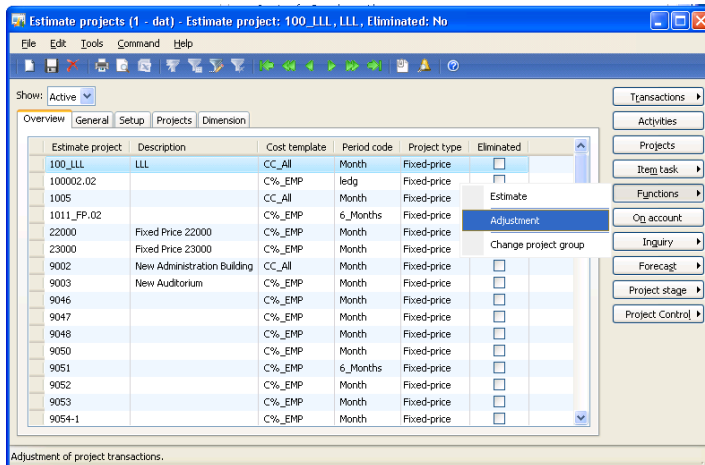


Figure 10. Improve the speed and accuracy of revenue recognition.

## Purchase Order

The standard purchase order (PO) form has been enhanced to hide fields that are irrelevant when a service, as opposed to a material item, is procured. Because the standard PO form in Microsoft Dynamics AX contains many fields, such as Warehouse, that are not applicable when the PO is for the purchase of services, it can result in confusing data entry and lead to errors.

### Benefit

Purchase Order removes non-services fields from the standard PO form to streamline and simplify data entry for services.

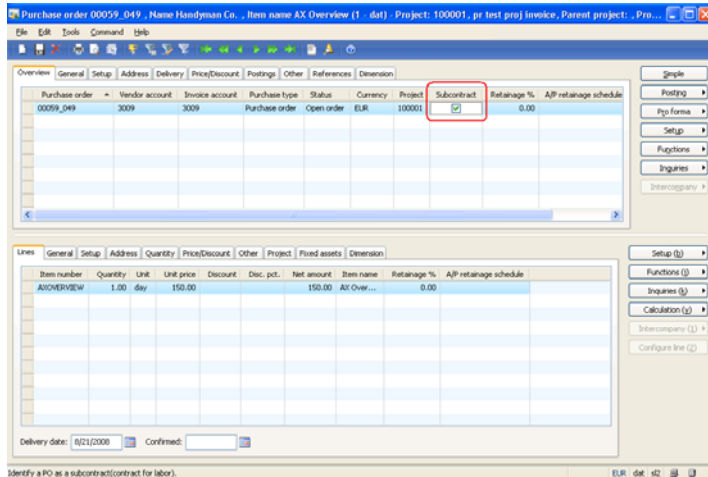


Figure 11. View only the fields you need on a purchase order for services.

## Purchase Requisition

Item requirements that are specified in the project budget are often needed when creating purchase requests. Professional Services for Microsoft Dynamics AX 2009 adds to the base project functionality of Microsoft Dynamics AX with Purchase Requisition, which enables you to import items from the budget into the purchase requisition.

### Benefit

With the Purchase Requisition enhancement, you can enable the automatic transfer of budgeted items to eliminate redundant data entry and help reduce errors resulting from manual data entry.

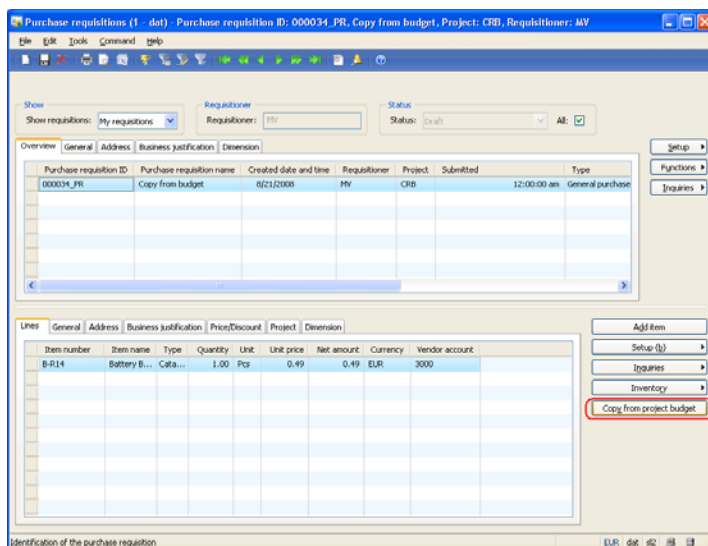


Figure 12. Automatically copy budgeted items using Purchase Requisition.

## Current Budget Reporting

Professional Services for Microsoft Dynamics AX 2009 includes a new budget methodology for original and revised budgets that allows for net change budget revisions and a calculated current budget.

As budget revisions are approved, they are written to a designated budget model that can be used in inquiries and reports.

### *Benefit*

Current Budget Reporting enables you to manage project budgets in real time so you can closely monitor project financials before they become a problem. Budget management is critical for tracking project performance, and ultimately for monitoring project health and profitability.

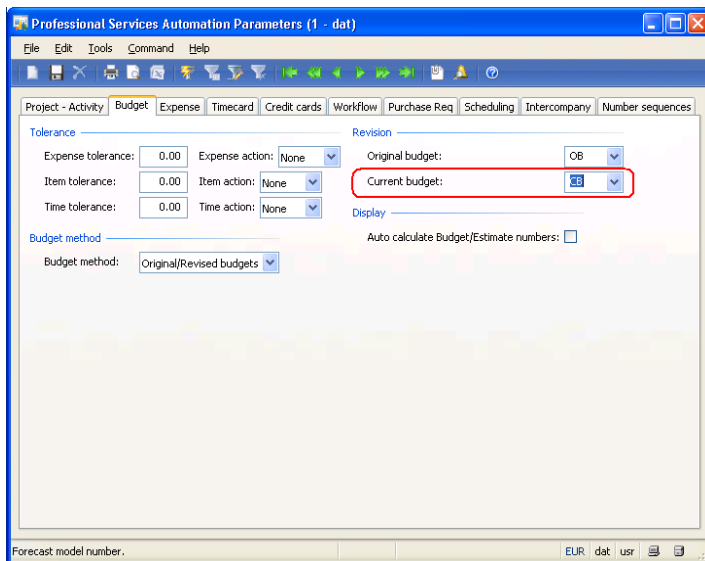


Figure 13. Track project financials using Current Budget Reporting.

## New Features in Professional Services for Microsoft Dynamics AX 2009

Professional Services for Microsoft Dynamics AX 2009 takes a major step forward by offering new features that bring greater levels of planning and control to professional services companies.

### Pay When Paid

The Pay When Paid feature gives you the option to allow vendors and subcontractors to be paid only upon receipt of the customer payment. Professional Services for Microsoft Dynamics AX 2009 adds new functionality to define when to use Pay When Paid (either at the project or vendor level).

Pay When Paid also provides a workbench from which you can view and manage vendor invoices.

#### Benefit

Company policy often mandates that payments will not be made to vendors until customer payments are received. Pay When Paid automates this process, which is typically a manual, error-prone process. This automation helps control cash flow and protects companies from incurring non-recoverable costs that result from contractor performance that is rejected by a client.

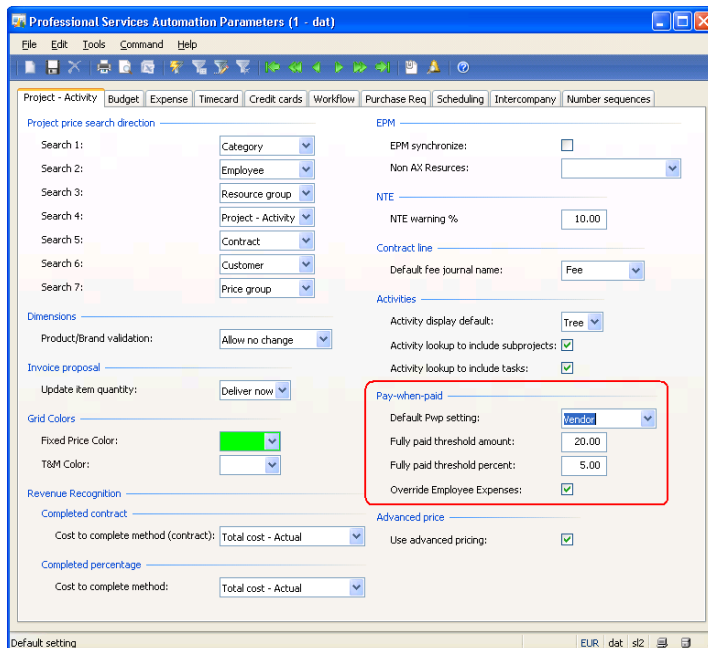


Figure 14. Manage vendor invoices with the ability to monitor threshold amounts.

### Project Quotation

Professional Services for Microsoft Dynamics AX 2009 takes the base Project Quotation functionality and extends it by adding new levels for output-formatting. With Project Quotation, you can:

- Create one or more project quotations per project request.
- Capture customer relationship management (CRM) information to track pipeline data, and deals in progress.

- Define Project Service templates that include transaction types, pricing, and resource scheduling requirements.
- Build a detailed and comprehensive quote that is formatted to client specifications by using a combination of levels, services groups, services, and activities.
- Automatically create the entire project structure from a quotation (including subprojects, tasks, and activities) as well as the project budget.
- Soft-book resources to a quote so that they are available when the quotation is approved, and have the option to hard commit those resources upon project creation.

### Benefit

Project Quotation makes it easier to define a project execution structure and transfer a quotation to the project. The process of creating a quotation that is detailed and formatted to a client's specification is an important requirement in winning new accounts.

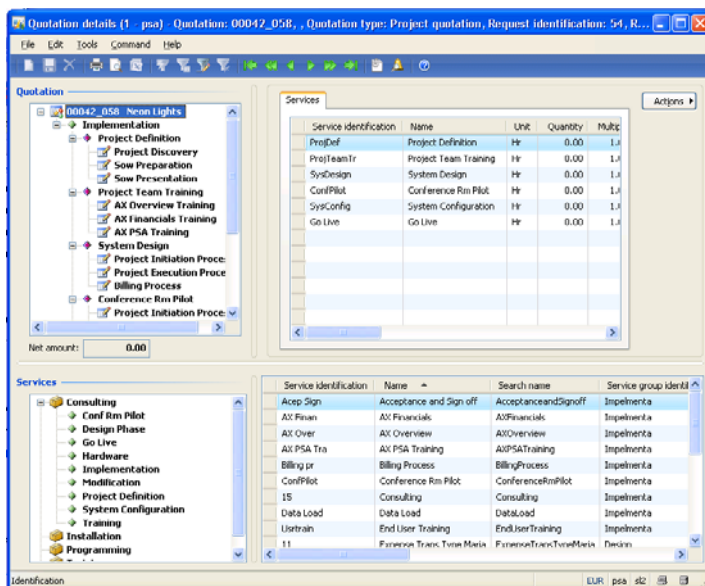


Figure 15. Quickly create a customized project quotation using detailed lists.

## Resource Scheduling

Resource Scheduling provides a robust employee/contractor-based resource scheduling engine that matches qualified and available resources to the appropriate task. A major component of this enhancement is a new scheduling workbench you can use to schedule by project or by resource.

Because professional services organizations are labor-centric, the correct deployment of labor resources is critical in delivering high levels of customer satisfaction. It's also important for maximizing resource utilization and revenue, and ensuring the appropriate staffing level and related cost.

## Benefit

Resource Scheduling enables companies to better control the allocation of their valuable assets to maximize profits, reduce costs, and increase client satisfaction by assigning the best available resources to projects and tasks.

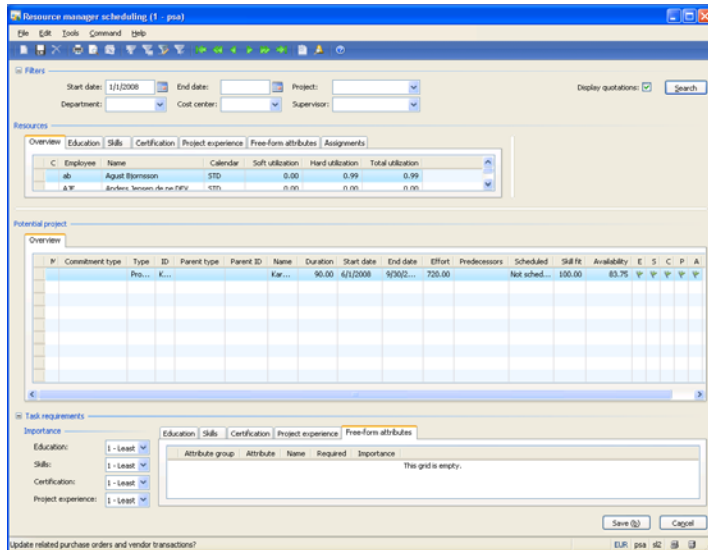


Figure 16. Optimize control of resource management to improve profitability.

## *Summary of Features*

Professional Services for Microsoft Dynamics AX 2009 is designed to meet the unique needs of professional services organizations by providing greater control over accounting practices and resources.

Professional Services for Microsoft Dynamics AX 2009 offers these benefits.

- Leverages the core enhancements of Microsoft Dynamics AX 2009:
  - Familiar, intuitive Microsoft Office interface
  - Windows Workflow Foundation
  - Web-based access with Enterprise Portal in Microsoft Dynamics AX
  - Role Centers
- Expands on the legacy features of Professional Services for Microsoft Dynamics AX:
  - Activity Breakdown Structure
  - Contract Status Lines—Paid Amount
  - Project Request
  - Price Group search capabilities
  - Enhanced revenue recognition and purchase order
  - Purchase requisition import
  - Current budget reporting
- Includes new product features and functionality:
  - Pay When Paid
  - Project Quotations
  - Resource Scheduling

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