



Industry

Modern  
Apps &  
Mobility

Lifecycle  
Services

Cloud

# Microsoft Dynamics AX 2012 R3 What's New

# Microsoft Dynamics AX 2012 R3 What's New

In this era of the customer – where technology has transformed the social fabric of how we engage, connect and interact with one another – it is critical for businesses to gain insight into their customers' needs in order to deliver experiences that build lasting relationships. Operating in today's digitally-connected world impacts businesses in so many ways, that adapting to customer preferences with agility and speed is essential.

Microsoft Dynamics AX 2012 R3 gives organizations an exceptional customer focus by being able to take advantage of cloud services, run agile operations that exceed customer needs, and help engage customers on their terms across the Web, social, apps and mobile fronts. It introduces a new end-to-end apps and services framework, allowing businesses to develop and distribute modern apps for specific scenarios and mobile devices that can easily and securely connect with Microsoft Dynamics AX for people at work and on the go.



When delivering amazing experiences is your intention – Microsoft Dynamics AX 2012 R3 is your solution.

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## Cloud

- Microsoft Dynamics AX 2012 powered by Microsoft Azure IaaS (Infrastructure as a Service)
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- Microsoft Dynamics Lifecycle Services on Microsoft Azure
- Modern apps and mobility with Microsoft Azure App Services
- Microsoft Dynamics AX cumulative updates

\* We anticipate general availability in Q4 CY2014  
\*\* Planned to be released in Q4 CY2014





# Industry

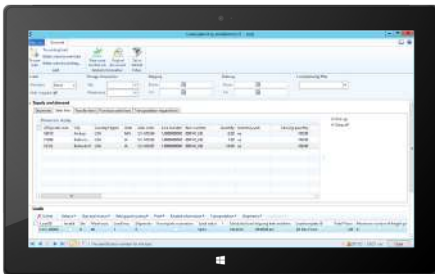
## Transportation Management

Transportation Management introduces global enterprise transportation planning and execution capabilities.

Manufacturing, distribution and retail companies will benefit from a Transportation Management System (TMS) that flexibly supports changing and growing business demands. TMS helps our customers deliver the right customer experience with out of the box capabilities to help meet and exceed customer expectations.

Business and IT users will gain visibility and control via a user-configurable rating structure.

- Enable intuitive transportation planning:
  - Inbound/outbound shipments.
  - Multi-shipment loads.
  - Shipment consolidation.
  - Load building.
- Send advanced shipping notices to customers and manage docks with appointment scheduling:
  - Driver check-in/check-out.
  - Driver log management.
- Shop transportation rates, by carriers. Configure rating structures based on:
  - Customer constraints.
  - Fuel prices (by state, country/region).
  - Toll charges.
  - Multi-mode and multi-segment planning and execution.
- Manage routes via transportation engines.
- Reconcile freight automatically or manually.



*Load planning workbench*

## Demand Forecasting

Demand Forecasting is a lightweight, yet powerful demand forecasting tool that enables organizations to forecast demand manually based on historical data using Microsoft SQL Server forecasting algorithms, adjust the forecasted demand using the familiar environment of Microsoft Excel, and import the values into Microsoft Dynamics AX forecast models.

Demand Forecasting will help organizations improve the accuracy of forecasts and therefore improve product availability, and minimize inventory costs.

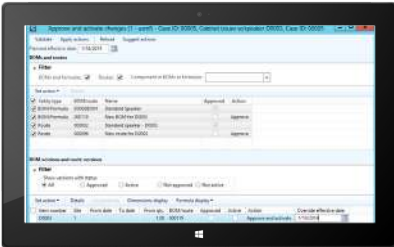
- Forecast demand with statistical baseline forecast generation based on historical data. This includes the ability to exclude outliers from the forecast to improve accuracy. Forecast generation uses algorithms from Microsoft SQL Server Analysis Services. Algorithms include the ARTXP algorithm (optimized for predicting the next likely value in a series) and the ARIMA algorithm (to improve accuracy for long-term prediction).
- Support an iterative forecasting process with baseline forecast visualization and editing using the extended capabilities of Excel and SharePoint. Import the edited forecast back into Microsoft Dynamics AX.
- Create forecasts by product family and choose desired inventory dimensions to include in the forecast.
- Forecast accurately by monitoring forecast accuracy KPIs.

# Industry

## Product Change Management

Effectively manage product changes through a formal product changes methodology.

With the new functionality you'll be able to have a defined process to initiate, document, approve and release changes to products during both planning and production cycles.



Approve and activate

- Create a product change case and add associated artifacts to the product change case.
  - Products.
  - Released products.
  - Bills of materials.
  - Formulas.
  - Routes.
- Identify impacted artifacts and add them to the product change case.
- Add comments to the product change case log.
- View relevant product change cases.
- Validate the completeness and consistency of the product change case.
- Manage the coordinated release of product changes:
  - Expire old BOM versions, formula versions and route versions.
  - Approve new BOMs, formulas and routes.
  - Approve and activate new BOM versions, formula versions and route versions.

## Serial Number Tracking Enhancements for Service and Warranty Scenarios

Serialized items are now supported in the sales and return processes without the need for tracking serial numbers through inventory.

When selling serialized items, companies capture serial numbers when preparing the packing slip and the invoice, or at the retail POS. In case of returns or warranty claims, companies can use the standard item tracing functionality to easily find the order history. When receiving returned items or when issuing a credit note, serial numbers can also be captured.

- Track serial numbers on packing slip, invoice, return orders, and credit notes.
- Trace serial numbers to sales orders and return orders.
- Reduce the amount of inventory transactions related to serial numbers.
- Simplify on-hand tracking for serialized items.
- Capture serial numbers using bar code scanners.
- Capture serial numbers on Retail POS.



Serial number form



## Trade Allowance Management

Offer customers pay-for-performance monetary rewards for achieving volume and behavioral goals with sales promotion programs. The trade allowance management capabilities are designed for organizations utilizing end-to-end promote-to-profit processes, starting from promotion fund budgeting and allocation, allowance contract setup, claims creation and processing, as well as payment processing and ending with promotion effectiveness analysis.

Trade Allowance Management will help organizations optimize the utilization of marketing promotion funds and reduce administrative time and effort.

- Optimize marketing promotion funds planning by creating and allocating promotion funds across multiple customer groups (hierarchies), products, and trade allowance agreements.
- Flexibly accommodate diverse promotional contracts through three different allowance types (i.e. bill backs, off invoice discounts, and lump sums). Promotions can be based on tiered amount- or quantity-targets periodic accumulation method, or per invoice.
- Improve control over trade allowance contracts by supporting the approval process with workflow.
- Simplify claim processing through automatic creation and accrual of claims and the bill-back workbench.
- Settle payments through integration with accounts receivables module and process.
- Manage and settle customer invoice short pays in deduction workbench.
- Improve the future effectiveness of promotion programs by analyzing fund details and actual cost reports.
- Have a quantified basis for ongoing and future negotiations on promotions as based on actual versus planned quantity and sales graphs. This module includes a new Trade Allowance Management analysis cube.

## Vendor Rebate Management

Automate administration, tracking and claiming process of vendor rebates.

- Reduce the administrative burden and errors associated with promotion performance monitoring and claim processing. Improve cash flow forecasts through accruing for future receivables and have a quantified basis for ongoing and future negotiations on rebates with the vendor.
- Accommodate different types of vendor promotion programs and rebate conditions by registering details of the negotiated rebate agreements with individual vendors or groups of vendors as based on tiered amount- or quantity-targets, periodic accumulation method or per invoice, for individual products or groups of products.
- Improve control over vendor rebate contracts by including them in the workflow approval process.
- Speed up rebate claims collection by automatically passing them as posted vendor invoices (credits) to standard A/P processing.
- Improve analytical overview of the vendor rebates by using the enhanced purchase cube.

# Industry



## Broker and Royalty Contract Management

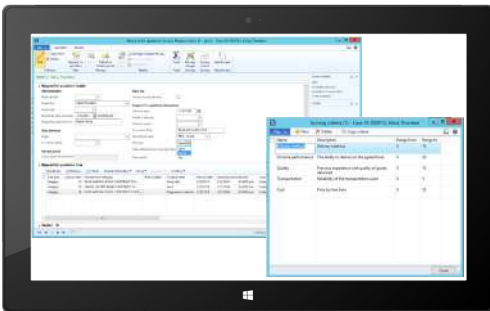
Manage payment of fees to brokers for the service of facilitating sales with broker contract management. Control usage-based payments for the right to the ongoing use of an asset or an intellectual property with royalty management. This module helps reduce the administrative burden of managing royalties and broker payments.

- Accommodate diverse broker contracts by registering details of the negotiated agreements with individual vendors, customers or groups of customers, based on tiered amount- or quantity-targets.
- Allow for flexible claim approval and differential amounts handling.
- Incur the broker fee yourself or pass it on to the customer.
- Improve cash flow accuracy through accruing broker payments as future liabilities.
- Accommodate diverse royalty contracts by registering details of the negotiated agreements with individual vendors, based on tiered amount- or quantity-accumulation, category-based item selection, and royalty amount definitions including fixed, percentage, and amount per unit.
- Automate vendor invoice posting for royalty amounts.

## eProcurement

Purchasing agents now have greater flexibility to configure corresponding rules and details to support solicitation management, including control over response types such as sealed and open type bids. With improved bid scoring and evaluation purchasing agents can establish tabulation criteria with different award methodologies.

- Improve decision-making by defining evaluation criteria upfront and improve management of Request for Information (RFIs), Request for Proposal (RFPs) and Request for Quote (RFQs) from solicitation to award.
- Enhance the vendor/government contractor experience and help vendors operate more efficiently by providing the ability to view and respond to open RFQs. This allows the proposal of item or services substitutes or no bid, and gives visibility into the status and results of a solicitation (for Public Sector). This includes a publicly available vendor portal and open bidding.
- Increase sourcing efficiencies through well-defined scoring criteria and rank vendor responses based on multiple criteria.
- Manage solicitations including specification of solicitation types, methods, scoring criteria, and track and communicate changes to the RFQ. Utilize sealed bid methodology on RFQs and provide questionnaires to qualify vendors to bid on specific items or services.
- Enjoy an intuitive vendor portal experience. It's easy to find what you're looking for and respond quickly.
- Score, evaluate, and rank all bids based on user-defined evaluation criteria.



Create new RFQ and scoring criteria



## Microsoft Dynamics CRM Integration, Project Client Integration and Visual Scheduling

Project pursuit and delivery teams now have the ability to work together in sync across Microsoft Dynamics products (CRM and AX) when outlining project scope, estimating costs and fees, producing quotations, and tracking progress in project execution.

Project managers can leverage past plans and best-practice to rapidly detail out new projects in their familiar Microsoft Project, refine timelines and adjust resource requirements. Plans may then be synchronized into Microsoft Dynamics AX work breakdown structures for ongoing revision and update.

Resource managers can easily find available resources from across the entire firm with the right competencies, certifications and other requirements and schedule them to the right projects using graphical and intuitive availability maps.

Taken together, the new capabilities in Microsoft Dynamics AX 2012 R3 make it easier for firms to respond quickly to client project needs with the right people, at the right time, for the right price, without rebuilding the wheel every time and without incurring as much risk.

Interconnect teams:

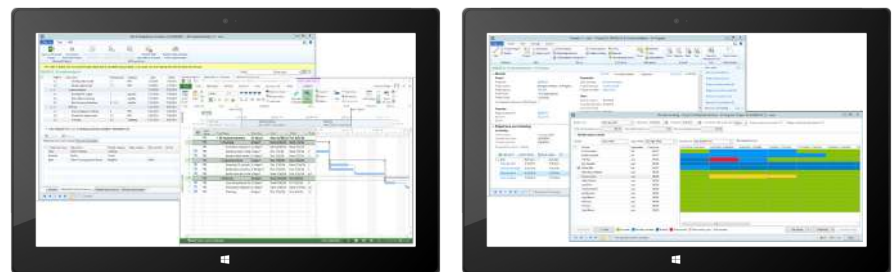
- Synchronize costing, pricing and delivery team visibility with Microsoft Dynamics CRM and AX integration.

Improve process flow:

- Manage opportunities through sales and marketing by collecting contacts, identifying stakeholders, and sketching requirements.
- Accelerate project initiation using the new work breakdown structure (WBS) template.
- Manage project execution through review and approval workflows.
- Simplify project billing with automation of intercompany invoicing for borrowed/loaned resources.

Balance resources across projects/organizations:

- Utilize built-in integration to do complex planning in Microsoft Project client and schedule resources visually in Microsoft Dynamics AX.
- Make better project staffing decisions with enhanced views into resource availability, skills, and costs across legal entities and divisions.
- Increase collaboration.
- Synchronize project information into Microsoft Office 365 for broader team collaboration and sharing.
- Submit time, expense, and approvals from various mobile devices while out of the office and on the road.
- Enhance business insights to accelerate decisions with role-specific project plan, cost, and effort tracking views.
- Improve views into project and portfolio status with new Power BI data and project management KPIs (such as planned versus actual costs as well as earned value).



*Project and Resource Planning*

# Industry

## Modern Point of Sale\* (POS)

Connected customers live in a connected world, and are well informed when making a purchase - before they even walk in the store.

Microsoft Dynamics AX 2012 R3 provides access to consolidated customer insights at the POS to enable employees to better serve customers.

The modern POS includes the basics around tender/transaction, but now also extends into a rich clienteling or assisted sales offering, as well as back office capabilities at the employees fingertips. The power of this new modern POS is that it becomes much more than a Point of Sale experience – it is a customer engagement dashboard!

For example, new assisted sales solutions will consolidate customers' purchase intelligence – such as sales history, transaction details, and wish lists - and provide this to the sales associates to better guide their customers.

Additionally, retailers can customize look and feel (font, color, graphics, and more) and optimize by store, by role, by user, and even by device.

For example, the cashier may have access to specific capabilities beyond tender, such as adding a loyalty card and looking up inventory, while a store manager may have access to store reports and real-time sales data.

These capabilities are based on a commitment to provide immersive, flexible, modern and mobile experiences for retailers and their consumers anywhere, anytime, and on any device.

- Empower sales associates in store with a Modern Point of Sale supporting the basics including tender/transaction, but also extending into rich clienteling, real-time inventory look-up, as well as back office capabilities at the employee's fingertips.
- Engage with customers through assisted sales using rich customer purchase intelligence regardless of what channel they shop in.
- Provide employees immersive and richer experiences through role-tailored POS UI, support of multiple platforms, multiple devices (e.g. tablets and phones), as well as integration to peripherals (e.g. receipt printers, scanners).
- Empower employees through highly flexible and rich inventory management, daily operations and KPI reporting, and engaging customer data including omni-channel wish-lists.
- Modern Point of Sale (or Modern POS or MPOS) refers to the "next gen" Point of Sale that is mobile and capable of running on various form factors like tablets, phones, phablets, etc. Modern POS works in conjunction with Retail Server, and the rest of all the retail components including Retail Headquarters, Commerce Data Exchange (CDX).



Multiple screens in Modern POS

\* We anticipate general availability of Mobile POS in Q4 CY2014

# Industry

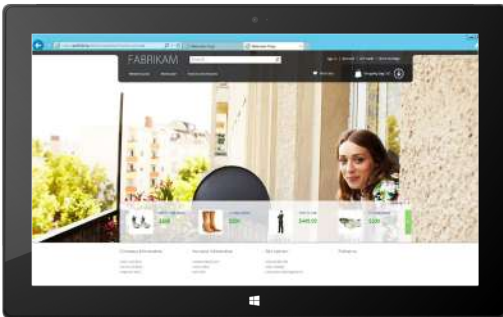
## eCommerce and Social

eCommerce and Social Media integration provides retailers with an opportunity to engage and connect with their customers on their terms, while offering an integrated and end-to-end Omni-channel shopping experience.

Enhancements let retailers extend services to their customers, for example, allowing them to connect with friends and followers who also share purchasing intentions and preferences on Facebook, Twitter, and Pinterest.

By deploying these types of connected solutions, retailers will be able to maximize their investments by avoiding extensive customizations and provide customers with a superior shopping experience.

- Deliver out-of-box shopping experiences including multi-language storefront, flexibility in delivery options (e.g. splitting orders, buy online pick-up in store).
- Deploy the solution rapidly and reduce time to value through multiple out of the box storefronts with publishing and checkout flows, with full access to customize the storefront.
- Define campaigns and promote through social media such as Facebook, Twitter, and Pinterest.
- Build campaigns once and distribute through multiple channels including eCommerce storefront and provide flexible redemption capabilities.
- Improve customer engagement on eCommerce storefront including: customer specific pricing, Omni-channel wish list (e.g. customer can build and save wish lists online, across sites accessed in store through the modern POS), customer account management, buying and redeeming gift card support, accruing and redeeming loyalty as well as the ability to sell kit items are enhanced in this release.



Online storefront in Microsoft Dynamics AX 2012 R3



# Industry

## Retail Industry Excellence

Enrichments of specific retail scenarios include pricing and promotions, assortment and catalog, virtual catalogs, retail kitting, BI and reporting, loyalty, gift cards enhancements. All of these enhancements are designed to work across all channels.

### Catalog:

- Define and manage mail-order catalogs including the products associated to the catalog, specific catalog pricing, catalog related call scripts and ability to link a catalog to one or more targeted mailing lists.
- Gain insight into promotional response rate tracking by creating specific key codes or source codes tied to the catalog which are linked to the sale in order entry.
- Define an ongoing product club, continuity program (i.e. book of the month) and the schedule of products to be sent to customers who purchase into this program.

### Kitting:

- Specify kit price different than component prices, substitute kit components, assemble and disassemble kits, sell across any channel.

### Pricing/Promotions:

- Offer threshold discounts: Discounts based on the total transaction value (e.g. \$10 off when you buy \$100 or more).
- Set category pricing rules: Markup or margin pricing for categories of products.
- Mix and match discount participate in retail discount concurrency rules.
- Manage pricing/discounts for catalogs and catalog products, and affiliations.
- Record all discounts across all channels and report on them.

### Loyalty:

- Accommodate a variety of scenarios including points by department/category, redeemable/non-redeemable points, and applicability by channels, loyalty tiers, date effective, etc. with loyalty schemes designed to be flexible.
- Configure various loyalty programs, loyalty tiers and loyalty tier rules.
- Manually set a loyalty card tier for a period of time, associate discounts to loyalty programs and loyalty tiers.
- Issue loyalty card and view loyalty card details in any channel as well as option of accrual/redemption of loyalty points in any channel.

### Gift Cards:

- Manage gift cards seamlessly regardless of channel: for example by selling and accepting gift cards in retail channels that span legal entities (e.g. global).
- Support selling and redeeming gift cards across all channels – POS, mobile clients, eCommerce, call centers.

## Retail Enterprise Manageability

In order to support deployments in retail enterprise organizations, the following scenarios are supported: setup and upgrade of retail stores per store in order to phase and align deployment with business requirements, large scale deployment using Microsoft System Center Configuration Manager, and monitoring and diagnostics using System Center Operations Management.

- Install, set-up and configure new stores more easily.
- Use SCCM (System Center Configuration Manager) to manage large scale deployments.
- Use SCOM (System Center Operations Manager) to run monitoring and diagnostics.
- Support https and hosting in IIS, pull model for data movement, data group concepts for better data management and performance, and scalability with redesigned Commerce Data Exchange.
- Meet customer needs for high volume scenarios as well as stress and limit testing benchmarks across all solution components via significant enhancements.

# Industry

## Call Center Sales

The Microsoft Dynamics AX 2012 R3 release continues to deliver on our omni-channel solution for retailers by introducing call center as a new channel.

This channel can be used for order entry, order processing and order fulfillment.

Retailers can offer mail order catalogs to their customers and manage this new streamlined channel.

Call Center provides retailers the choice and flexibility of offering call center sales and order management with the same end-to-end omni-channel capabilities as in other channels. This includes:

- End-to-end customer service, fast customer keyword search, fast order entry and assisted sale, as well as enhanced order fulfillment.
- Integrated pricing, promotions/discounts.
- Installment billing.
- Order hold management (e.g. ability to put orders on hold, review, and cancel/release as needed).
- Upsell/cross-sell definition (e.g. pop ups during call center order entry to provide suggestions of additional products to be sold).
- Ability to define call center scripting at the start of order, end of order, by product or cross-sell/upsell and catalog-specific scripts.
- Detailed order and order line status including partially shipped and backordered information.
- RFM (Recency, Frequency and Monetary) scoring of customers.
- Out of Balance parameters and hold capabilities for managing under and over payments.
- Manage mail-order catalogs, for example the ability to sell or return products that are not assorted to the store, but may be in a specific catalog.

## Retail Essentials

Retail Essentials is a configuration option within Microsoft Dynamics AX 2012 R3 that provides a highly simplified experience to support core retail operations only. It can be integrated with existing backend systems.

- Streamlined and simplified setup experience allows users to get the solution setup quickly and easily.
- Simplified area page and entities allows users to navigate various areas quickly as well as shows only the relevant information that is applicable to them in the right context.
- Checklist and wizard-like experience for setting up stores, as well as easy validation steps to ensure communication between the head office and stores.
- Enhanced seed data allows for quick and easy setup and configuration experience.
- Store Manager data striping allows manager to view only the relevant information for their stores including workers, terminals, purchase orders, transfers, etc.
- Data migration framework allows users to bring in data from external system specifically optimized for retail entities. Out of the box data migration support for Microsoft Dynamics RMS product offering.
- Accounting export to third party financials packages, can happen on-demand or on a prescheduled basis through batch framework.

## Order Entry Enhancements for High-volume (Consumer) Transactions

Enhances order entry capabilities by a single, more accessible view into inventory, product promotions, and customer activity.

These build on the existing order processing functionality in Microsoft Dynamics AX 2012 R2, and introduce new capabilities to manage B2C orders.

Streamlines order entry by enhancing Microsoft Dynamics AX with:

- Product keyword search.
- Discount and charge overrides.
- Multiple payment types including gift cards and coupons.
- Postage and handling calculation.
- Up-sell/cross-sell alerts.
- Simplified sales order completion with order summary.
- Detailed order status and notifications.
- Configurable fraud rules.
- Manual or automatic set up of order holds and processing.

## Human Resources

Enhanced HR capabilities include HR and Payroll analytics, position forecast, streamlined regulatory reporting, benefit updates and U.S. payroll/tax setup.

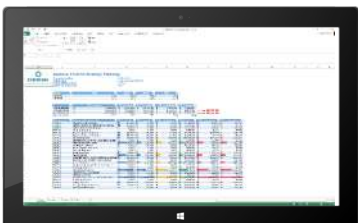


*Workflow enabled personnel actions*

- Enhancements to forecast position functionality includes detailed compensation estimates for new positions and support for what if scenarios.
- HR and Payroll Analysis Cubes enables you to use tools such as Microsoft Excel, SQL Server Analysis Services, and Power View to create custom reports. Power View provides quick and easy visualization of your data such as total headcount, and turnover percentages for the month, year, or quarter.
- Streamline U.S. regulatory reporting with new preparation reports: EEO-4, EEO-5, VETS100, 940, 941, Unemployment, OSHA300, OSHA300A, OSHA30 and new hire.
- Enhanced benefits processing for Benefit Managers to expire/change the enrollments for multiple workers.
- More easily track and control hires, terminations, transfers and promotions by using employee-based personnel actions and workflow.
- Simplify U.S. tax setup with mass updates of employee taxes. Streamline reporting with new preparation reports for state quarterly wage and Payroll Unemployment Wage and Tax.

## Budget Planning

Budget managers can now benefit from enhancements in budget planning including the ability to allocate budget plan amounts based on ledger allocation rules.



- Generate budget planning worksheet templates for Microsoft Excel by using a wizard in Microsoft Dynamics AX.
- Offers summary/total dimensions when you analyze and update budget plans by using multiple scenarios. Automatically route budget plans together with worksheets, justifications, and attachments for reviews and approvals.
- Allocate budget plan amounts using ledger allocation rules.

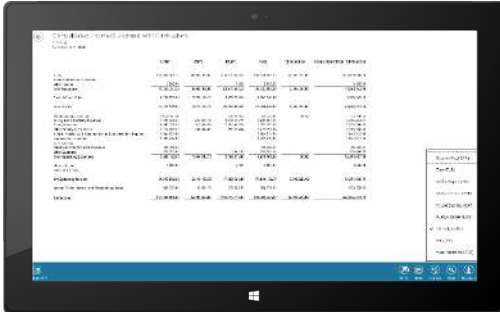


# Industry

## Management Reporter

Global organizations can have complex consolidation scenarios. Often legal entities that need to be consolidated have different chart of accounts and fiscal periods. The consolidation process in Management Reporter, which is now part of the Microsoft Dynamics AX installation, supports these scenarios without the need for an elimination company.

- Supports currency translation.
- View reports in any currency.
- Provide easy access to transaction details with drill back to Microsoft Dynamics AX from the Web Viewer.



The screenshot displays a financial report titled 'Consolidated income statement with eliminations'. It features a multi-column table with various financial metrics. The columns include 'USD', 'EUR', 'GBP', 'USD', 'USD', and 'USD'. The rows represent different financial categories such as 'Sales', 'Cost of sales', 'Gross profit', 'Operating expenses', 'Operating profit', 'Financial income', 'Financial expense', 'Income before taxes', 'Income tax expense', and 'Net income'. The table is presented in a clean, professional layout with a blue header and footer.

*Consolidated income statement with eliminations*

## Master Data Management (MDM)

Manage master data across multiple Microsoft Dynamics AX 2012 R3 instances.

Master Data Management is built on top of Microsoft SQL 2012 Master Data Services (MDS) to simplify full, and selective, data synchronization and enables central conflict management to help build trust in your data.

Master Data Management helps to increase the consistency of your data across your organization and deployments. It helps maintain reliable data for key business entities and enables data integrity for unified data governance and helps improve data analysis.

- Built on Microsoft SQL Server 2012 Master Data Services (MDS) and the Microsoft Dynamics Data Import/Export Framework (DIXF) MDM manages master data across multiple Microsoft Dynamics AX 2012 R3 instances.
- Modify master data entities or add additional entities.
- Master data entities can be modified or additional entities can be added.
- Supports either single master (one point of change) or multi-master scenarios (distributed) to meet the modification and management needs of your organization.
- Maintain consistency across instances over time with full and incremental change synchronization.
- Help trusted business users or data stewards ensure data reliability across the enterprise via automatic conflict detection in the central data store and manual data conflict resolution.
- Speed the review and editing of conflicts through the Microsoft Excel MDS add-in that provides a familiar, easy-to-use interface.
- Easily manage the frequency and depth of synchronization to continuously adjust to the needs of the business.
- Supports integration and data synchronization with 3rd party systems through adapter development and customization.

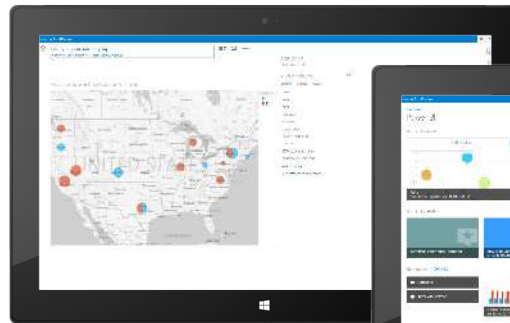
# Industry



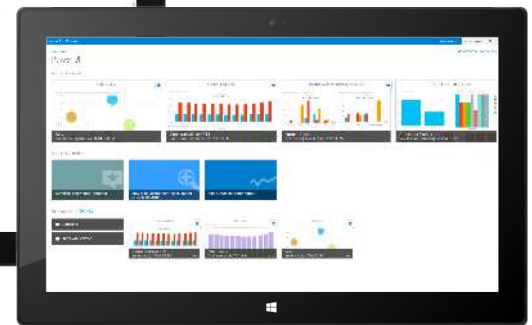
## Business Insights

Microsoft Dynamics AX 2012 R3 and Power BI for Office 365 provide you with the tools you need to explore and discover your data so you can accelerate your insights, know what your customers need, and deliver amazing experiences.

- Create an OData feed to expose information from an existing Microsoft Dynamics AX query in Microsoft Excel.
- Visualize, analyze, forecast, and ask questions of your data using the broad self-service BI capabilities in Excel and Power BI for Office 365.
- Make fast decisions, share them broadly, and access insights anywhere on any device with Microsoft Power BI and SharePoint.



*Search with Power BI Q&A*



*Power BI Sites*

## Multi-Threading Compiler

New compiler reduces compilation times by up to 90%.

- Moves the compile operations of all X++ source code and metadata validation from the Client to the AOS server.
- Compiling utilizes parallel computing and multi-threading.

# Modern Apps & Mobility

## Applications Across Devices

### Modern App Framework

Microsoft provides technology to develop, manage, distribute, and use modern apps designed for today's mobile first, cloud first world, with the potential to transform today's business processes and customer interactions.

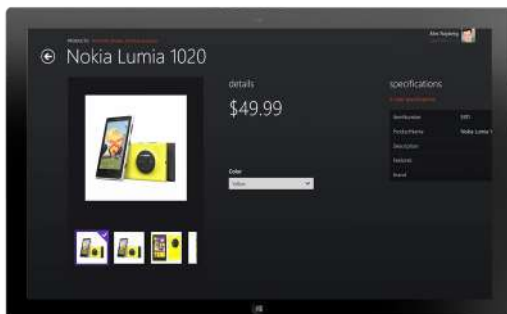
Connect Microsoft's or custom-built modern apps easily and securely from outside the organization's firewall with Microsoft Dynamics AX. The framework uses the cloud and Microsoft Dynamics AX's web services framework for communication between modern apps on the mobile devices and Microsoft Dynamics AX.

- Communicate data to and from Microsoft Dynamics AX 2012 using the Application Integration Framework service.
- Connect devices from outside the organization's firewall using the Microsoft Azure Service Bus.
- Secure communication using Microsoft Active Directory Federation Services as identity provider.
- Develop modern apps for specific business scenarios using guidance (SDK), components and technology provided by Microsoft.
- Distribute Microsoft's apps to enterprise users through the Windows Store and custom-built apps through your enterprise's private market place using Windows Intune.

### Modern Point of Sale\* (POS)

Microsoft Dynamics AX 2012 R3 provides access to consolidated customer insights at the POS to enable employees to better serve customers.

- Empower sales associates in store with a Modern Point of Sale supporting the basics including tender/transaction, but also extending into rich clienteling, real-time inventory look-up, as well as back office capabilities at the employee's fingertips.
- Engage with customers through assisted sales using rich customer purchase intelligence regardless of what channel they shop in.
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Multiple screens in Modern POS



Multiple screens in Modern POS

\* We anticipate general availability of Modern POS in Q4 CY2014



# Modern Apps & Mobility

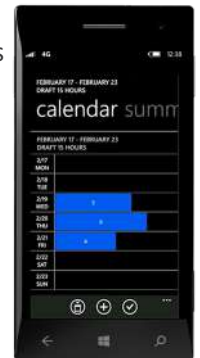
## Applications Across Devices

### Microsoft Dynamics AX 2012 Timesheets

Create, manage, and submit project timesheets in Microsoft Dynamics AX 2012.

With Timesheets, capture project time "on-the-go", simplifying this task while providing organizations the opportunity to improve working capital through decreased billing cycle times.

- Improve productivity with a modern UI that works across desktops, laptops, and tablets based on Windows 8.x.
- View the list of timesheets.
- Create and submit a new timesheet for approval.
- View and modify timesheets.
- Simplify distribution within your global organization with availability in 38 languages in the Windows Store.
- Available on or off the corporate network.



*Entering timesheets in the Microsoft Dynamics AX 2012 Time and Expense mobile phone app*

### Microsoft Dynamics AX 2012 Expenses

Create, manage, and submit expense reports in Microsoft Dynamics AX 2012. Help people to both capture and reconcile expenses while traveling, thereby reducing both time and effort. Implement your organizations' expense policies more seamlessly.

- Improve productivity with a modern UI that works across desktops, laptops, and tablets based on Windows 8.x.
- View the list of expense reports or unreconciled expenses.
- Create, view, and submit expense reports.
- Add/edit expenses and receipts to expense reports.
- Simplify distribution within your global organization with availability in 38 languages in the Windows Store.
- Available on or off corporate network.



*Expense report view*

### Microsoft Dynamics AX 2012 Approvals

Manage approvals in conjunction with Microsoft Dynamics AX 2012.

Enable approvers who are on-the-go to quickly view and take action on business requests such as budget, time sheets, expense reports, and purchase requisitions.

- Improve productivity with a modern UI that works across desktops, laptops, and tablets based on Windows 8.x.
- Approve any approval type workflow in Microsoft Dynamics AX 2012.
- View the list of items that need your review as well as recent actions you have taken.
- Reach out to your coworkers directly from the app using Microsoft Lync or email to clarify approval items.
- Gain insights through attached reports and information that help approvers make the right decision.
- Simplify distribution within your global organization with availability in 38 languages in the Windows Store.
- Available on or off corporate network.



*Start screen in Microsoft Dynamics AX 2012 Approvals modern app*

# Modern Apps & Mobility

## Applications Across Devices

### Microsoft Dynamics Business Analyzer

Help accelerate your business with actionable and engaging business insights. Tailored for specific roles Microsoft Dynamics Business Analyzer provides pre-configured business insights and a user experience that can be personalized to fit your needs. Whether you are in the office or on the go you can discover and interact with your favorite charts and financial reports or collaborate and share insights to help drive decisions more quickly.

- Get insights fast with an interactive and engaging user experience that works across desktops, laptops, and tablets based on Windows 8.x. Includes pre-defined roles for Chief Financial Officer and Practice Manager.
- Personalize to your needs and select charts, financial reports and KPIs that are relevant to you.
- Interact with data, view by periods or dimensions and drill down into transaction details.
- Collaborate with others through real-time communication using the Microsoft Lync modern app or by using the Windows 8.x Share charm to share a snapshot.
- Simplify distribution within your organization with availability in US Windows Store (English only).

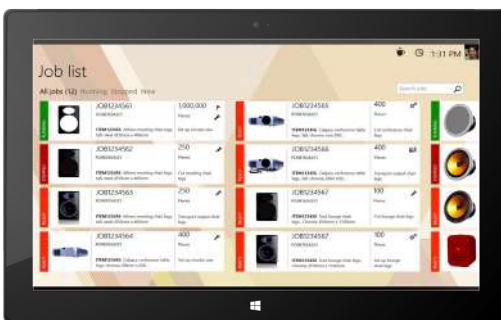


Start screen of Microsoft Dynamics Business Analyzer

### Microsoft Dynamics AX Production Floor

Provide shop floor workers with an overview of the production jobs that need attention. Quickly perform daily production tasks such as starting jobs, reporting jobs as finished, and registering breaks and absence.

- Get insight into the status and details of production jobs with a modern user experience based on Windows 8.x.
- Start production jobs, report jobs as finished, and enter feedback.
- Read files that are attached to production jobs.
- Clock in and out automatically when you start or exit the app.
- Register breaks, indirect activities, and absence.
- Simplify distribution within your organization with availability in US Windows Store (English only).



Overview of production jobs in Microsoft Dynamics AX Production floor app



# Modern Apps & Mobility

## Mobile Phone Applications

### Microsoft Dynamics AX Time and Expense

Help people on-the-go be more productive by creating and submitting timesheets and expenses using a mobile device.

- Create and submit timesheets.
- View project details via a calendar or list view of associated projects.
- Capture expense transactions and receipts using a mobile phone.
- Make a photo of the physical receipt and attach it to the expense transaction.
- The expense will be synchronized and stored in Microsoft Dynamics AX 2012 as an unreconciled entry. These entries can easily be added to expense reports.
- Simplify distribution within your global organization with availability in 38 languages in the Windows Store and an English-only version for Android on iPhone.

### Microsoft Dynamics AX Paystub\*

View your paystub pulling directly from the U.S. payroll solution. Mobile Paystubs for Windows Phone 8 gives you access to historical paystubs anytime, anywhere.

- View 13 months of paystub history and direct deposit amounts for each paystub. Time off accrual balances are available with each paystub including: accrued, used and remaining balances.
- View details for each of 8 pivots of the paystub details.
- Simplify distribution within your organization with availability in US Windows (Phone) Store (English only).

\* We anticipate general availability of Modern POS in Q4 CY2014



# Lifecycle Services

## Microsoft Dynamics Lifecycle Services Overview

Microsoft Dynamics Lifecycle Services (LCS) helps organizations improve the predictability and quality of their Microsoft Dynamics AX 2012 implementations by simplifying and standardizing the implementation process. In addition, periodic, proactive monitoring of the system can help reduce system downtime.

Lifecycle Services is a Microsoft Azure-based collaboration portal that provides a unifying, collaborative environment along with a set of regularly updated services that help manage the application lifecycle of your Microsoft Dynamics AX 2012 implementations.

It is a collaborative workspace that can be used by both customers and partners, separately and together, to enable closer collaboration, and speed implementations and reduce time to value.

- Design, develop, and operate your implementations with the following services available: Business process modeler, License sizing estimator, Usage profiler, Infrastructure estimation, Cloud hosted environments, Customization analysis, Upgrade analysis, System diagnostics, Issue search, Cloud powered support, and Updates installer. All of the services are continuously updated with expanded functionality and new services are continuously being developed and deployed.
- Facilitate easy and fast communication and information sharing across teams using the customer-managed, security-enhanced collaboration workspace.
- Supports project management using Sure Step or other methodologies to help your implementation be successful.
- Manage your projects with a project-specific dashboard to highlight the project's current status to more easily identify, understand and proactively address any problems and issues.
- Copy configuration details between companies and environments using Data Import/eXport Framework (DIXF) entities.\*

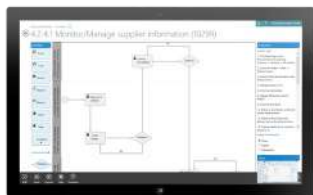


Project Start screen in Microsoft Dynamics Lifecycle Services

## Business Process Modeler

Business process modeler helps standardize your business processes (currently 600+ flows are defined) across the organization. Provide dynamic business process documentation of your implementations by using the Business process modeler to create, view, and modify business-process hierarchies and flowcharts.

Task Recorder helps you easily capture and modify business processes, generate training and on-boarding documentation, track versioning, automatically create business process flow charts in Microsoft Visio, and does gap-fit analysis to help both identify and manage the development of your AX 2012 R2 and later implementations.



Business Process Modeler in Microsoft Dynamics Lifecycle Services

- Create, view and modify business process hierarchies and flowcharts for over 750 process flows already mapped to Microsoft Dynamics AX 2012 R2 and later.
- View, track, and activate previous versions of business processes for process design changes and to help meet regulatory requirements.
- Describe your specific business processes using the flowcharting tools.
- Utilizes the cross industry, best practices taxonomy from the American Productivity & Quality center ([APQC](#)).
- Standardize your processes across the organization as well as refine them to match your competitive differentiators.
- Perform gap-fit analysis between the business needs and the default processes in Microsoft Dynamics AX 2012 R2 and later.
- Export the output of the gap-fit analysis for use in Microsoft Visual Studio Online or Microsoft Team Foundation Server to help developers track and manage the fit-gap requirement's workloads.
- Generate Microsoft Word documents, Microsoft Visio flowcharts and customized videos quickly and easily to better enable user adoption and on-boarding training.
- View specific meta-data or click through to the specific Microsoft Dynamics AX screen directly from the process symbol in the flowchart.
- Expanded Visio integration that supports importing diagrams and attaching to Process or Activity levels\*\*
- Integration of Artifact management, Search and custom metadata, requirements gathering and Team Foundation Server/Visual Studio Online\*\*\*

\* Coming H2 CY2014

\*\* Coming Q3 CY2014

\*\*\* Coming H2 CY2014 and H1 CY2015



# Lifecycle Services

## License Sizing Estimator

License sizing estimator helps you estimate the configuration of the different types of Client Access Licenses (CALs) that an organization could use. This services supports Microsoft Dynamics AX 2012 R2 and later license sizing.

- Determine the estimated, required mix of user licenses based on the roles and activities in your organization to better understand license usage and help lower license acquisition costs.
- Model the effect of duty-level customization of roles on your license requirements.
- Provide the total number of Client Access Licenses (CALs) needed by type and level in simple to ready, easy to understand charts and tables.
- Generate actual license usage report for connected environments.

## Usage Profiler

Usage profiler helps you estimate the projected or current usage of Microsoft Dynamics AX 2012 implementations.

You can use the data from the Usage profiler for a variety of purposes such as adjusting scheduling to reduce system load and impact, estimating hardware sizing, and helping to troubleshoot issues with support.

- Model user and batch loads to gain a better understanding of the current or projected loads of your Microsoft Dynamics AX 2012 implementation.
- Enter data directly, import process data from Business Process Modeler, or use the Microsoft Excel template, including built-in data/format checking, to upload your projected or estimated usage data.
- Generate a detailed summary of usage characteristics including system configuration, transaction volumes and scheduling information.
- See a graphical representation of your organization's peak load profile.
- Analyze load volumes to reschedule tasks to mitigate peak loads or to accommodate peak loads in your infrastructure estimations.
- Produce estimates of different server licenses necessary for your Microsoft Dynamics AX 2012 environment to help identify a starting point for infrastructure sizing.
- Utilize data from the Profile summary report so project stakeholders can gain a better understanding when planning an implementation.

## Infrastructure Estimation

Infrastructure estimation allows you to estimate the hardware than can be necessary and useful for your Microsoft Dynamics AX 2012 R2 and later implementations based on the information within Usage profiler.

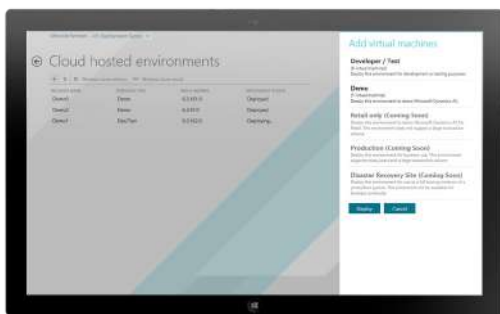
- Provides automated estimates of hardware needs based on Usage profiler data. This base estimate does not replace an in-depth manual sizing estimate, but can provide a starting point for determining to required equipment to support your implementation.
- View easy to read, graphical reports that make it easy to see the impact that changes to your usage and peak load profiles can have on estimated infrastructure needs to support your implementations.
- Estimate pre-live environments for both on-premises as well as Azure deployments\*

\* Coming H2 CY2014

# Lifecycle Services

## Cloud Hosted Environments

Cloud hosted environments helps you simplify the deployment of Microsoft Dynamics AX 2012 R3 environments on Microsoft Azure by automating the server set-up and deploying the systems and software for different environments.



Microsoft Azure Deployment Portal in Microsoft Dynamics Lifecycle Services

- Simplify and automate deployment of multiple topologies including demo, development/test, and Production\* of Microsoft Dynamics AX 2012 R3 on Microsoft Azure.
- Add attachments to incidents to help speed time to resolution.
- Provide for a disaster recovery scenario using Microsoft Azure\*\*
- Deploy environments directly to your own Azure subscription while you maintain control and access to those systems.
- Turn on/off Azure virtual machines from Cloud hosted environments dashboard when needed without help of IT staff.
- Link to Azure VMs via .rdp from within Cloud hosted environments.
- Scale systems up or down as you need them through the Azure Management Portal while only paying for the resources you actually use.

## Customization Analysis

Customization analysis offers Microsoft Dynamics AX 2012 customers an automated tool that validates the customer's model files against Microsoft Dynamics AX best-practice rules.

It generates reports that list all identified issues as well as a developer report that can be loaded into the Microsoft Dynamics AX 2012 development environment.

- Use a continuously updated, cloud-based rules engine to analyze code and identify potential best practice, performance and upgradeability issues.
- Generate actionable reports in Microsoft Excel and HTML that can be imported into MorphX IDE as actionable to-dos for developers to speed customization development.

## Upgrade Analysis

Upgrade analysis helps users plan their upgrade to Microsoft Dynamics AX 2012 R3 from previous versions.

Analyzing data about your current environment helps to prepare the data and estimate the scale of the upgrade project.

- Analyze your current implementation to help estimate the scale of upgrading from Microsoft Dynamics AX 4.0, Microsoft Dynamics AX 2009, or Microsoft Dynamics AX 2012 to Microsoft Dynamics AX 2012 R3.
- Collect data automatically using the Rapid Data Collector (RDC) tool to aid the analysis and understanding of your upgrade needs and requirements.
- Generates a Microsoft Excel file that identifies code, data structure and security updates to identify design issues to address as part of your upgrade.

\* Planned to be released in Q3 CY2014  
\*\* Planned for Q4 CY2014





# Lifecycle Services

## System Diagnostics

System diagnostics helps IT administrators proactively monitor and understand the health of one or more Microsoft Dynamics AX 2012 environments.

It is a cloud-based tool that has a locally-installed component that can be configured to automatically and periodically gather system information about your implementation. The information is run against built-in rules to gauge performance, identify potential issues, offer suggestions on solutions, and identify links to relevant KB articles to help manage your implementations.

- Monitor and understand the health of one or more Microsoft Dynamics AX 2012 environments.
- Supports SQL Server 2014.
- Connect to implementations behind proxies expanding support for a wider range of implementations and security configurations.
- Set and track rules run against data collected across your Microsoft Dynamics AX 2012 environments and view the results in a simple, easy to navigate, graphical dashboard with quick access to outstanding issues, recommendations of target actions, as well as direct links to content-related support documents and KB articles.
- Generate reports to provide monitoring and actionable corrective action summaries to help you be proactive in the management of your implementations.

## Issue Search

Issue search is a search engine that you can use to quickly search a Microsoft database for KB articles, hotfixes, fixes in-progress, regulatory feature updates, and workarounds for reported issues in Microsoft Dynamics AX 2012 implementations.

View the status of reported issues, download hotfixes and see which code objects, as well as actual lines of code, are affected before installing to understand the impact to your implementations.

- Search across a Microsoft database for KB articles, hotfixes, fixes in-progress, regulatory feature updates, and workarounds to help you resolve issues in your Microsoft Dynamics AX 2012 implementations and help keep them running efficiently and reduce downtime.
- Filter results by topic, status and/or version to easily and quickly find answers.
- Review which code objects, as well as actual lines of code, are affected by a hotfix prior to downloading so you can analyze the impact of the changes to your environment before you install.
- Get notifications for issue status changes and new fixes for Microsoft Dynamics AX functional areas to help you proactively manage your implementation.
- Follow an open issue\*
- Search code defects and MR issues\*

\* Planned for H2 CY2014



# Lifecycle Services

## Cloud powered support

Cloud powered support is a customer-driven process to prevent and resolve incidents.

This reengineered, collaborative support process simplifies self-diagnosis, the communication between the customer and Microsoft, and the option to replicate a customer's environment and issue in a collaborative VM hosted in a Microsoft datacenter.

- Simplify and accelerate the issue submission process for Dynamics AX 2012 R2 and later implementations.
- See and review incidents that are submitted, including those filed through Premier support.
- Choose to automatically replicate your system configuration so you can reproduce the issue in a collaborative VM in a Microsoft data center to simplify and unify the communication with Microsoft Support.
- Share a collaborative VM between the user and Microsoft Support until the issue has been resolved.
- Add additional info as need such as customizations and data to help replicate the issue.
- Create a snapshot of the system state of the VM to help speed future support needs with spin ups up to 80% faster.

## Updates

Help keep your Microsoft Dynamics AX 2012 R3 implementations current using the new update experience powered by Lifecycle Services and Microsoft Azure.

Install Cumulative Updates (CUs) easily and quickly to your Microsoft Dynamics AX 2012 R3 implementations.

Utilize slipstreaming to speed new implementations and deployments as well as save time with the auto code merge capabilities that help to reduce down time.

- Discover and download the latest CUs from Lifecycle Services.
- Easily identify the updates in the CU that are relevant for each of your implementations based on your system configuration and location.
- Alerts for relevant, available updates as well as the introduction of a packaging mechanism.\*
- Get a visual insight into the impacted business processes through Lifecycle Services and Business process modeler.
- Utilize slipstreaming to identify and install detected updates, binary hotfixes or service packs when installing Dynamics AX 2012 R3 components for the first time to help speed new implementations and deployments.
- Resolve conflicts between hotfixes and customizations automatically using the Merge code automatically feature.

\* Planned for H2 CY2014

## Microsoft Dynamics AX 2012 powered by Microsoft Azure IaaS (Infrastructure-as-a-Service)

Utilize the power of Elastic IT to scale up or scale down your infrastructure to meet the needs of your business.

Utilize the experience, global footprint, security and reliability that every enterprise should demand of cloud solutions to extend your IT operations.

Continue to use the products and management systems that IT staffs know and are familiar with to bring even greater efficiency to your implementations.

- Utilize IaaS with the support of Microsoft Dynamics AX 2012 R3 to run on Azure.
- Easily and rapidly deploy any number of environments your organization needs.
- Quickly deploy a production environment in a matter of hours instead of weeks saving both time and money.
- Simplify and automate the deployment of Microsoft Dynamics AX 2012 R3 through the Lifecycle Services Azure deployment portal.
- Scale your capacity on a global system of data centers to almost any size to match the needs of your businesses.

## Disaster Recovery Powered by Microsoft Azure\*

Utilize the power, scalability and flexibility of the cloud for disaster recovery of your Microsoft Dynamics AX 2012 R3 implementations.

- Easily deploy a disaster recovery environment in Microsoft Azure that you can connect to your Microsoft Dynamics AX 2012 R3 environment whether on premises or in the cloud.

## Microsoft Dynamics Lifecycle Services on Microsoft Azure

Lifecycle Services is a Microsoft Azure-based collaboration portal that provides a unifying, collaborative environment along with a set of regularly updated services that help manage the application lifecycle of your Microsoft Dynamics AX 2012 implementations.

- Provide global teams easy, security-enhanced access to a single repository with a view of the implementation project and related documentation.
- Enable closer collaboration and speed via a workspace in the cloud that can be used by both customers and partners, separately and together.
- Simplify and accelerate incident resolution with user-driven, cloud-powered support. This collaborative support process simplifies self-diagnosis, the replication of your environment and issue in a collaborative VM in a Microsoft datacenter, as well as unified communications between you and Microsoft.
- Use the latest services and guidance from Microsoft to monitor your system's health, evaluate your customizations, or resolve issues with regular, frequent updates to the cloud services.

\* Planned to be released in Q4 CY2014



## Modern Apps and Mobility with Microsoft Azure App Services

Connect Microsoft's or custom-built modern apps easily and securely from outside the organization's firewall with Microsoft Dynamics AX. The framework uses the cloud and Microsoft Dynamics AX's web services framework for communication between the modern apps on your staff's mobile devices and Microsoft Dynamics AX.

- Connect devices from outside the organization's firewall using the Windows Azure Service Bus.
- Secure data communication using Microsoft Active Directory Federation Services as identity provider.
- Distribute Microsoft's apps to enterprise users through the Windows Store, and custom-built apps through your enterprise's private market place using Windows Intune.

## Microsoft Dynamics AX Cumulative Updates

Help keep your Microsoft Dynamics AX 2012 R3 implementations current using the new update experience powered by Lifecycle Services and Microsoft Azure.

- Discover and download the latest cumulative update (CU)s from Lifecycle Services.
- Easily identify the updates in the CU that are relevant for each of your implementations.
- Get a visual insight into the impacted business processes through Lifecycle Services and Business process modeler.
- Save time by using the auto-code merge capabilities.

# Pervasive Interoperability

Drive innovation—today and tomorrow—by working with a standard Microsoft technology platform that simplifies deployments and lowers costs, giving you the power to drive your business forward. You can deploy in the way that works best for you—on-premises, in the cloud (directly or through partners), or using a hybrid model—and make incremental changes as needed. With Microsoft Dynamics AX, you get a business solution from Microsoft that is backed by an ongoing global commitment to research, development, security, and innovation.

Maximize your investments, lower TCO, and make additional productivity gains through Microsoft Dynamics AX 2012 interoperability with Microsoft business productivity solutions and the application platform, including the support for Microsoft products:

- Microsoft Windows 8.x
- Microsoft Windows Server 2012 R2
- Microsoft SQL Server 2014, Microsoft Internet Explorer 11
- Microsoft Azure

For a full overview please see the [systems requirements document](#)