

SUCCESS

Microsoft Dynamics AX at a Glance

White Paper

A document based on Microsoft Dynamics AX fact sheets and
organized by Business Ready Licensing Edition

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Introduction

Microsoft Dynamics™ AX is an integrated, adaptable business management solution that can help people make more informed business decisions with greater confidence. Microsoft Dynamics AX works like and with familiar Microsoft software such as the Microsoft® Office system. This means people have less of a learning curve, so they 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, to increase the productivity and effectiveness of your business and help employees drive business success.

Purpose of This Document

This document consolidates the core features and functionality in Microsoft Dynamics AX. It is intended for you to use as a tool to familiarize yourself with the full scope of the solution. The document is divided into four sections, based on Microsoft Dynamics AX Business Ready Licensing:

1. Business Essentials
2. Business Essentials Additional Components
3. Advanced Management
4. Advanced Management Enterprise

This document lists core functionality but does not describe every functional element inside Microsoft Dynamics AX. Please refer to the Microsoft Dynamics AX documentation for deeper detail on functionality.

Also note that some functional areas span more than one Business Ready Licensing edition. For example, the Advanced Management edition of Microsoft Dynamics AX offers some production components, while Advanced Management Enterprise offers additional, more advanced production components. Please keep reading for more details.

I. BUSINESS ESSENTIALS

This 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. The Business Essentials edition is streamlined for easy installation, rapid user adoption, and affordability. Functionality includes:

- Alerts
- Financial Management
- Logistics
- Trade

Alerts

Alerts in Microsoft Dynamics AX helps drive workflow efficiency and empower people to keep a close, accurate eye on what's happening across your business. Rather than relying on random e-mail messages or other on-the-fly processes, people across your organization can 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 completed.

KEY BENEFITS:

- Provide a fast, easy way to set up alerts. People can right-click within any Microsoft Dynamics AX record to define an alert rule for changes and events that they want to monitor.
- Work more proactively by specifying which events to monitor. Maintain tighter control over business activity by defining conditions for alert rules—for example, set up an alert rule to notify you one day before a shipment from a certain vendor is due.
- Meet specific needs for your business. Tailor alerts to your business priorities by creating templates for alert rules or modifying existing rules for individual users.
- Provide flexible delivery options. Help ensure people get the information they need—as pop-up windows, e-mail messages through Microsoft Office Outlook®, or through Enterprise Portal for Microsoft Dynamics AX—all right from within Microsoft Dynamics AX.

Financial Management

Financial Management in Microsoft Dynamics AX helps you automate your business-critical financial processes so you and your people can be more effective.

KEY BENEFITS:

- Helps you ensure regulatory compliance and expand your business across geographies
- Helps you improve the efficiency of your financial operations and enable strategic planning
- Helps you manage your cash flow effectively
- Provides greater insight into your finances and improves your ability to make the right decisions quickly

- Perform fast and reliable accounting, financial reporting, and analysis. Extend access to your financial data across your company and business community to improve the efficiency of your existing accounting processes.

Increase your business without geographic constraints

A truly comprehensive solution, Financial Management gives you critical local market functionality. The solution helps you do business across borders by supporting multiple languages and currencies while managing currency exchange rate adjustments and helping you meet accounting requirements in different countries.

With Financial Management, you can acquire and activate additional functionality as the need arises. The solution can help you manage local legal and regulatory compliance, so you can maximize your tax treatments and create favorable business conditions in foreign markets. You can also employ extensive tax management functionality to choose from a wide range of options for tax calculations, posting, and reporting.

Improve the efficiency of your financial operations and enable strategic planning

Fully integrated with other functionality inside Microsoft Dynamics AX, such as project finance, logistics, trade, production, fixed assets, and others, the solution can help you register financial data in the ledger in real time, reflecting the business flow and securing fast and accurate financial reporting. Connectivity across modules enables you to trace transactions to their origins, so you can verify and analyze transactions immediately or on demand, to support external or internal audits. You can help ensure critical data is more secure by setting up information access or approval privileges based on job function or other criteria.

You can use Financial Management to execute financial operations from a single corporate database, thereby reducing time-intensive, repetitive administrative tasks and helping your team move from strictly tactical activities to more strategic ones. You can consolidate results online across multiple companies, and a customizable user interface and online Help functionality help deliver low training costs.

Manage your cash flow effectively

Financial Management can give you deeper insight into your financial status and cash flow whenever you need it. You can analyze your liquidity with cash flow forecasts and optimize the way your company manages foreign currencies. With Bank Management in Microsoft Dynamics AX, you can reconcile your accounts, custom-format paper checks, and monitor and report deposits, payments, and balances on bank accounts. You can also use the electronic payment option to import customer payments automatically into your payment journal, or make vendor payments with clear visibility into all your accounts so you can manage your cash flow more effectively.

Get greater insight into your finances and make better decisions faster

Use financial dimensions to deepen your analysis capabilities without complicating your chart of accounts. Define and work with multiple financial dimensions to better break financial data into categories for more detailed analysis. For example, you can analyze and measure financial data across cost centers, departments, regions, products lines, or other dimensions that you can create and customize.

With Financial Management, you can generate financial reports with flexible, advanced reporting tools that offer multiple import and export options, including XBRL and hard copy. You can map your charts of account and dimensions into reporting structures that match your business model, or you can aggregate figures into a framework for strategic analysis.

Financial Management can also help you analyze actual results against multiple budget assumptions to deal with dynamic market conditions where a single, fixed budget for the fiscal year is not realistic.

Logistics

Logistics in Microsoft Dynamics AX gives you the flexibility to manage inventory and purchasing according to your needs, with functionality to support forecasting, classifying, and tracking inventory and the efficient creation and management of bills of material (BOM). The solution exchanges information with many other functional areas in the solution including production, master planning, trade, finance, and CRM, to help ensure a high degree of synergy between logistics and other key areas of your business.

KEY BENEFITS:

- Optimize inventory levels by matching supply with customer demand.
- Improve your inventory management with detailed insight into your inventory and item tracking.
- Improve your materials requirements planning with flexible options for managing BOMs.
- Create BOMs quickly and easily using the graphical BOM designer.

Get detailed insight into your inventory

Inventory dimensions are a powerful tool for classifying your inventory according to storage and item characteristics, so that you can get a detailed overview of your inventory whenever you need it. You can track items throughout the system using batch and serial numbers. You can also view documents related to an item using a simple tree graphic from anywhere in the system. At any time, you have direct access to information telling you where items were used and where they can be found.

Create BOMs quickly and easily

The graphical BOM designer is a graphical suite used to create and manage BOMs based on Microsoft drag-and-drop technology. The familiar, user-friendly environment makes it faster and easier to construct BOMs using a graphical tree structure. The BOM designer displays all levels and components of the BOM, and you can drag relevant items from the inventory table into the BOM.

The BOM designer also displays the route for the current BOM so you can drag items from the BOM into the operations on the route where they are to be consumed. This helps to achieve more accurate lead time calculations when scheduling production in Master Planning for Microsoft Dynamics AX.

Flexible management of BOMs

Logistics gives you an efficient and flexible means of managing BOMs to help ensure you get the most accurate costing and materials requirements information.

You can effectively manage 40 BOM levels and accurately calculate consumption of raw materials by using formulas specific to each component. Price calculations, using cost price, can be performed for each level of the BOM, giving you accurate and detailed pricing information, which is updated throughout the solution. You can create multiple BOM versions to provide maximum flexibility, and you can use the version date of each BOM to control the validity of different versions. You can access and reuse previous BOM versions anytime.

Trade

Microsoft Dynamics AX is an all-in-one solution that gives you real-time connectivity across your business. Using the Trade in Microsoft Dynamics AX module, you can integrate sales and purchasing processes with other key functional areas of the system including logistics, production, warehouse management, financials, the Application Integration Framework, CRM, and master planning.

KEY BENEFITS:

- Deliver better customer service with more efficient sales processes.
- Reduce costs by supporting your purchasing and warehousing processes.
- Improve relationships with your customers and suppliers by using trade agreements.
- Trade smoothly with your subsidiaries with the ability to manage intercompany orders within one system.
- Achieve better cost control with greater visibility into cost prices and accurate inventory valuation.

Deliver better customer service

Trade provides the backbone in streamlining purchasing, warehousing, and sales processes. This module helps you improve your customer service by giving you advanced control over your sales orders. When entering sales orders, Trade automatically checks credit limits, customer account information, pricing agreements, and inventory levels so you can give your customers real-time information. Trade gives you the ability to look into real-time, available-to-promise (ATP) data, and it applies delivery date control so you can make accurate and precise order and delivery promises. You can print, fax, send via e-mail, or publish order confirmations on the Web, offer your customers flexible invoicing options, keep track of back orders, and manage returned items.

To further speed up your sales and purchasing process, you can electronically exchange trading documents with your customers and suppliers using the Microsoft Dynamics AX Application Integration Framework and Microsoft BizTalk® Server 2006.

Optimize your purchasing processes

Microsoft Dynamics AX helps you purchase the right products at the right time with the best price. With insight into supplier prices and lead times, you are better able to compare quotations from suppliers with different delivery deadlines, price conditions, or other parameters. Historical data and analysis tools help you evaluate past supplier performance so that you can make more informed purchasing decisions for the future.

The tight integration within Microsoft Dynamics AX means that you need to register received goods only once, and then all relevant areas of the system are automatically updated. This streamlines record-keeping and saves time and resources while reducing the risk of manual errors.

Trade smoothly with your subsidiaries

The intercompany functionality of Microsoft Dynamics AX enables several companies, subsidiaries, or distribution centers to trade internally within one Microsoft Dynamics AX installation. Using intercompany functionality, a company can apply a variety of required intercompany trading policies that help ensure the trading process between companies is always in sync, enabling a greater degree of process automation and control. You can minimize your stockholding costs by having visibility into inventory in all companies, subsidiaries, and distribution centers, and by sourcing inventory across locations. You can minimize your manual work effort across companies by automating the intercompany trading processes and the intercompany order fulfillment.

Achieve better cost control with greater visibility

Trade in Microsoft Dynamics AX helps you maintain accurate inventory valuation and gain insight into the variation of your cost prices. The cost price of inventory can be continuously updated through recalculations to reflect the actual price. The standard cost price and any differences can be posted to different general ledger accounts so that variances are readily visible.

Use different methods of inventory valuation for different items including first in/first out (FIFO), last in/first out (LIFO), weighted average, and standard cost price. The handling of miscellaneous charges helps keep inventory valuation more accurate. You can also control the effect of miscellaneous charges, such as freight and insurance, on cost prices.

II. BUSINESS ESSENTIALS ADDITIONAL COMPONENTS

Microsoft Dynamics AX Business Essentials users can extend their solution by purchasing a selection of additional modules on a flat fee basis. These modules include Human Resources, Additional Languages, and configuration/development tools such as access to Microsoft X++[®] source code/object server and Component Object Model (COM) clients. Business Essentials users can also purchase additional financial dimensions and additional users of Microsoft FRX[®] Designer.

Human Resource Management (Business Essentials Additional Components)

Human Resource Management in Microsoft Dynamics AX can give you deeper insight into the status of individual employees, an overview of your entire organization and the strategic tools you need to develop the human resources upon which your business goals depend.

KEY BENEFITS:

- Get an easy overview through simple structuring of organizational units and job profiles.
- Analyze the efficiency and well-being of your organization by monitoring employee absences.
- Optimize relationships with employees through personalized self-services by using Enterprise Portal.

All your employee information in one place

Human Resource Management in Microsoft Dynamics AX gives your human resources team the core administrative tools to help them manage employees, teams and departments across your organization more effectively. With your company's employee information stored in a structured, easily retrievable manner you can concentrate on managing and solving human resource issues rather than simply documenting them.

Modeling organizational units

Keep track of the organizational changes in your business. With visual, function-oriented diagrams, you can create organizational charts for full, matrix, and project overviews. You can easily change the organizational framework to reflect any changes in your organizational structure.

Automate key recruitment processes

Recruiting new employees and managing internal job rotations are ongoing processes. By using Human Resource Management to automate personnel recruitment, you can control the process from the moment an application is received, through correspondence and interviews with relevant managers, right up to the point of employment or rejection. Learn from the experiences of previous recruitment campaigns and pinpoint the most effective media and methods for sharper, more effective recruitment communications.

III. 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 organization. Functionality includes:

- Business Analysis
- Marketing Automation
- Master Planning
- Production (Advanced Management)
- Project Accounting (Advanced Management)
- Sales Force Automation
- Sales Management
- Telemarketing
- Warehouse Management (Advanced Management)

Business Analysis

Business Analysis in Microsoft Dynamics AX helps provide the power you need to quickly transform business data into knowledge and strategic action.

KEY BENEFITS:

- Helps provide the insight you need to better control your business.
- Avoid external reporting tools and data replication.
- Turn raw data into useful business knowledge.
- Receive the answers you need in real time.
- Perform multiple-company data retrieval.
- Provide business users with security-enhanced and flexible analytical tools.
- Work easily with Microsoft SQL Server™ Business Intelligence.

Turn raw data into useful business knowledge

Business Analysis in Microsoft Dynamics AX helps you analyze important factors that affect your bottom line. You can compare vendor data, analyze warehouse operations, develop strategies to retain preferred customers and attract new customers, and create customer profiles and segmentation analyses. You can share up-to-the-minute information such as customer purchasing and supplier inventory, and identify weak spots in your supply chain so that you can make the necessary changes. Analysis tools help you answer questions such as “How will switching my suppliers affect my profits?” or “What is my delivery lead time?” You can analyze costs associated with employee retention and productivity. You can also do flexible transaction-level data retrieval and analysis for the data of one or many companies.

Business Analysis has two styles of operation. Use predefined views to transform raw data into valuable business insight, or create on-the-fly reports from any data in the application. The analytical tools are based on the SQL Server Business Intelligence platform. Using either On-Line Analytical Processing technology (OLAP) or the SQL Server drag-and-drop reporting

environment, business users can find and act upon the data they need. These Microsoft technologies work smoothly together, helping you avoid additional expenditure on any third-party business intelligence or reporting tool.

With Business Analysis, you can reduce the time and costs associated with analyzing your business data. Both multidimensional analyses using Microsoft SQL Server Analysis Services and ad hoc reporting using Microsoft SQL Server Reporting Services Report Builder are supported out of the box with Business Analysis. These capabilities reduce the time required to generate answers from the system while also reducing the potential for errors, simply by providing a single point of administration for your business intelligence infrastructure and the data it requires. Business Analysis also supports many languages and currencies for both OLAP and ad hoc reporting.

Get the answers you need in real time

Business Analysis can give you business insight when you need it most. Analyze and drill down into your business information instead of following static reports. Transform data into multidimensional analyses that support enterprise-scale data volumes and hierarchies. Conduct transaction-level investigations across multiple-company data to discover useful nuggets of information. Create ad hoc reporting perspectives that describe cross-module subsets of business data to support free-form analysis. Manipulate and derive usable business information by applying ratios, cumulative totals, trends, and allocations across dimensions and across hierarchical levels of your data.

Reports can be saved to Microsoft Office Excel® or published securely to a shared server without intervention by your IT department.

Precision

Business Analysis helps you generate reliable results from your analyses, regardless of how complex the query is. The business data used during analysis is constantly updated because it includes changes as they occur in Microsoft Dynamics AX or other data sources. You can set OLAP updates to run every day, every week, or every month. There is no duplication or doubling of information sources. With SQL Server Report Builder, data is retrieved directly from the transaction database, allowing real-time retrieval from an online replica.

You can also look at the results of your analyses at any scale, from a high-level overview down to microscopic detail. When analyzing buying patterns, for example, you can view information by customer group, specific customer, specific invoice, or any other level you choose. By continuously measuring performance, you can accurately measure whether your business goals are being met and whether your strategies are working effectively. Business Analysis also gives you transparency when looking for the relationship between activities in different departments, locations, or subsidiaries.

One of the barriers to traditional business intelligence, and particularly to OLAP analysis, is the time and expertise needed to build and maintain the applications and data. Business Analysis can have a lower total cost of ownership than other analytical applications by using a built-in Cube Definition Manager to simplify the processes of creating and maintaining cubes. Also, the new ad hoc reporting features help users to completely define their path of exploration through the business data.

Get deep analyses directly from Microsoft Dynamics AX

With traditional OLAP products, the process of mapping information between the enterprise resource planning (ERP) business data and the OLAP cube can often be difficult and time-consuming, because information needs to be mapped between two separate systems.

Security

The security is managed centrally, reducing both the effect on users and the strain on your IT department. You have full control over which users have access to which models. The users must be registered on the server they select to gain access. With SQL Server Report Builder, security settings at the company, table, and record levels are all honored directly in Microsoft Dynamics AX, enabling a single point of administration for all your business data security needs.

Marketing Automation

Marketing Automation in Microsoft Dynamics AX gives you the necessary insight to create targeted, personalized campaigns across all your company's communication channels.

KEY BENEFITS:

- Helps you take advantage of customer knowledge to increase the effectiveness of your marketing activities.
- Easily gather and use customer feedback to build more effective campaigns.
- Helps you easily and credibly measure the profitability of campaigns.

Increase the effectiveness of marketing activities

The key to successful direct marketing is to give your contacts the information they need—how and when they need it. Marketing Automation helps you easily identify the registered customers and prospects that will respond favorably to your marketing campaigns. You can quickly plan and execute personalized campaigns by using a campaign window that consolidates all the information and functionality needed to communicate via direct sales, call centers, e-mail, fax, and the Internet.

Defining and selecting a campaign target group can be both the most difficult and the most important phase of campaign planning. With Marketing Automation you can segment your target audience into meaningful profiles to facilitate personalized campaigns targeted at specific customers' needs. Selection criteria are based on information stored in the Microsoft Dynamics AX database, and results can be modified and filtered to meet your exact requirements. You can then save and reuse these selections for future campaigns.

Campaigns are organized in a hierarchical structure, indicating relationships between different marketing efforts. To keep the process as simple as possible, one employee has overall responsibility for each campaign, but numerous employees can be assigned tasks within multiple campaigns.

Easily gather and use customer feedback

You can learn from your customers by using questionnaires in conjunction with your campaigns. Web-based functionality helps you to interact easily with your customers over the Web, and Web integration helps make it both faster and easier for customers to respond to your questionnaires. Marketing Automation can also save Internet responses directly into the Microsoft Dynamics AX database, and this information is instantly propagated to users

throughout your company. When responses start flowing in, your users can have complete access to all details provided by any specified target group, which lets them easily examine answers given to particular questions. Easy-to-use answer registrations are designed to enable effective follow-up. You can also use customer responses to get market insight and a head start on planning for future demands.

Integration between sales, marketing, and customer service departments is one of the keys to meeting customer expectations. By enabling resources from one department to be relayed to a common encyclopedia, these departments can use a wider scope of information and are better equipped to support each other.

Measure the profitability of campaigns

You can monitor your return on investment (ROI) by linking a campaign with a project, and view revenue, costs, and the work put into your marketing efforts. Income and expenses related to each campaign can be laid out in the campaign form, so you can quickly compare the cost of the campaign with the revenue it has generated.

Master Planning

Master Planning in Microsoft Dynamics AX shares information with production, logistics, trade, and CRM functionality, helping to streamline your manufacturing processes and supply chain. In addition, Master Planning can be run for intercompany transactions, helping you reduce costs, satisfy your customer demands, and improve your overall business performance.

KEY BENEFITS:

- Minimize lead times and maximize on-time deliveries to customers.
- Respond quickly to changes in demand for materials and capacity.
- Reduce inventory levels through improved production planning and forecast scheduling.
- Finite capacity schedule at order-taking.

Optimize production flow

By using the information within your company and associated supply chain, Master Planning can help you optimize production, material planning, and scheduling. Finite material and capacity scheduling can be performed at the same time so that available capacity, inventory levels, and purchase and transportation lead times are taken into consideration in your production planning. This helps you plan purchase, production, and transfer orders more reliably, which can help you optimize your production flow and provide on-time delivery to your customers.

Flexible planning results in increased efficiency

Use different master plans to run online simulations and what-if scenarios, so you can foresee the impact of different sales forecasts and planning strategies. You can run master scheduling in a fast, net-change mode where only the latest changes are included in the calculations. This enables you to run materials and production planning as often as needed, so you can always have an up-to-date picture of the net requirements.

Outsource production with ease

Master Planning helps you outsource production to subcontractors whenever you need to. You can also model subcontractor capacity levels in the system and quickly implement make or buy strategies throughout the planning process. This benefits both you and the customer by freeing your capacity and helping you keep delivery promises.

Quickly respond to changes

Action messages suggest changes to purchase and production orders based on changing requirements, helping you to optimize inventory levels and improve production flow. Additionally, future messages provide notification of the earliest possible delivery date, so that you can quickly take action on sales orders to maintain customer satisfaction. You can also increase the efficiency and accuracy of planning with time fences, which help ensure that procedures are carried out at the correct time according to your manufacturing policies.

Deliver on time

Avoid making delivery promises you cannot keep by running available-to-promise (ATP) calculations based on available inventory and current production orders, as well as capable-to-promise (CTP) calculations based on raw material lead times and production capacity.

Minimize inventory levels to reduce costs

Cut down on unnecessary inventory carrying costs while still meeting your customers' delivery demands. Forecast scheduling in Master Planning uses sales forecasts to project production and purchasing plans that are closely matched with demand. You may also optimize your safety stock levels based on either target service levels or on lead time coverage. Include seasonal deviation in product sales when calculating safety stock to further refine inventory levels.

Function smoothly across warehouses

Further optimize your production planning by sourcing materials from across multiple warehouses. Master Planning can operate with any number of warehouses and automatically generates transfer orders to fulfill inventory requirements. In addition, you can set up each warehouse with individual parameters to help ensure correct levels of safety stock and service at different locations.

Production (Advanced Management)

Production in Microsoft Dynamics AX gives you real-time insight into your manufacturing processes to help increase both your production efficiency and profitability while helping to reduce your overall costs.

KEY BENEFITS:

- Minimize lead times and satisfy customer demand with flexible scheduling options.
- Get an up-to-date, on-demand overview of raw materials consumption through journals.

Manage Your Production Process

Production in Microsoft Dynamics AX can give you the flexibility you need to achieve maximum profitability from your manufacturing resources. Production orders can be created independent of, or on the basis of, proposals from master scheduling, and Production helps you manage bills of material (BOMs) efficiently. Categorize production orders into pools for scheduling or groups to be posted in the general ledger. Track actual production costs against estimated and

standard costs. Create tight integration between production orders, purchase orders, and transfer orders so you can drive a smooth flow of material to and from the subcontractor. Also, you can plan production orders directly from sales orders.

Get More Control over Production Bills of Material

Copy standard BOMs to the production order and modify them later if you need to. You can also handle by-products of production by using negative quantity on BOM lines. Control each item within a BOM 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, so you can create what-if scenarios.

Powerful Scheduling Options

Schedule forward or backward with different dates as starting points based on lead time of raw material, and create finite or infinite material scheduling as well as rough cut or detailed job scheduling.

Production Consumption

All consumption is reported through journals, which the system can generate and post automatically. You can also backward-flush items, and handle scrap as either a constant or a variable.

Project Accounting (Advanced Management)

Project Accounting in Microsoft Dynamics AX is a complete and easy-to-use module that helps you efficiently manage project accounting across your company with full financial overview and controls and real-time integration into supply change management and other related modules.

KEY BENEFITS:

- Help maintain tighter control of project accounting and drive efficiencies.
- Improve cash flow management.
- Help improve productivity.
- Obtain strategic business insight.

Maintain tighter control of projects

Project Accounting can support the accounting needs of multiple project types such as time and materials and internal projects such as cost and time projects. By enabling you to deconstruct a large, complex project into manageable subprojects and providing easy-to-use graphical project family trees, Project Accounting helps you rapidly identify and address delays and avoid cost overruns.

You can specify different properties for each project task, such as start or end date, capacity load, or the relationship between tasks. You can also schedule tasks for work center groups or work centers. A Gantt chart is provided to give you an overview of capacity load.

The solution helps you manage day-to-day administrative financial tasks and anticipate potential delays by helping you and your employees estimate and record the completion percentage of activities. Your employees can easily register their working hours on-site or

remotely by using the Internet, providing you with an always-updated view of employee hours spent on a project.

Improve cash flow management

Project Accounting serves as a central data repository where your employees can keep the status of their projects registered and up to date. Having accurate information enables you to shorten the billing cycle because you can generate invoices immediately and get paid for projects faster. Invoices can appear in the currency of your choice to suit the needs of your customers and vendors in projects or subprojects. You can also bill multiple projects for one customer by creating a single invoice event whenever you need to. The solution helps you avoid delays and predict major cash outflows by planning when you will need to acquire chargeable equipment and materials throughout a project.

You can keep your customers updated with timely and accurate progress reports. Customers who feel well-informed may be less likely to dispute invoices and more likely to pay on time.

With Project Accounting, you can also link back-office systems with companies with which you have both a customer and vendor relationship, to offset balances and help save time and money in administration.

Improve productivity

Project Accounting can help you define new projects quickly by pulling data from the central Microsoft Dynamics AX database. You can also speed up project creation by using templates recycled from previous projects. A single view of all current and planned projects helps you anticipate bottlenecks before they appear.

Obtain strategic business insight

Project Accounting lets you build meaningful hierarchies and categorize projects using sorting criteria, so you can understand the true costs of the services you render and get an accurate and detailed view of profitability. The solution can provide actionable data to help you identify market trends, take on the right projects, and avoid committing to projects that you can't staff or that won't be profitable.

Project Accounting also enables you to use account categories to map parts of a project to general ledger accounts to get a more detailed analysis. You can summarize by project or cost category type. You can also categorize transactions based on hours worked, costs incurred, items issued, and revenue to be billed. Accounting analysis dimensions provide a powerful way to run detailed analyses without complicating your chart of accounts.

You can obtain insight either from the overall project statistics window, where you can filter among related projects and budget versus actual transactions, or from standard reports, where you can specify various data ranges. Using optional OLAP analysis services, you can present data in PivotTable® reports.

Sales Force Automation

Sales Force Automation in Microsoft Dynamics AX helps you manage your customer relations more effectively by giving you the insight to help identify your customers' needs and make optimal sales and marketing decisions.

KEY BENEFITS:

- Customer and prospect-related data repository helps increase sales force productivity and effectiveness.
- Easily identify and seize sales opportunities.
- Companywide overview of all customer and prospect-related interactions, including correspondence, phone logs, and auto-generated activities.

Increase sales force productivity and effectiveness

Sales Force Automation in Microsoft Dynamics AX is your sales organization's toolbox, containing the tools to organize contact information, track opportunities, manage accounts, and establish and monitor the sales pipeline. Time previously wasted on manual, repetitive administrative tasks can be spent more productively by taking care of customers and making sales.

By giving your sales teams insight into each of your customers' needs and purchasing habits, Sales Force Automation helps manage customer relationships more effectively. You can access and update all customer, prospect, and vendor information through the business relations window. This presents all information related to the sales flow, including outstanding sales orders, current offers, activities, forecast data, and related documents. Using this real-time information, your sales staff can quickly identify up-selling and cross-selling opportunities and predict future behavior, so you can attract and retain customers with the highest lifetime value for your company.

A workbook containing day, week, and month planners gives your sales staff an instant overview of all sales activities with to-do lists and activity details, and helps them work more efficiently. You can view sales quotations and open orders, or check the calendar for your colleagues. You can also synchronize appointments, tasks, and contact persons with Microsoft Office Outlook manually or automatically.

Make document handling easier with a document list containing all documents organized by contact person, sales order, quotation or activity assigned to that business relation. E-mail messages sent from the contact window of Sales Force Automation are automatically stored in the document management system of Microsoft Dynamics AX. Documents can be dragged from Microsoft Dynamics AX to an Outlook e-mail message.

Identify and act on sales opportunities

You can quickly view and manage the sales pipeline from opportunity management to win/loss and SWOT analyses, helping you identify new opportunities, meet customer demands, and make confident and accurate decisions based on real-time information.

The quotation functionality helps you make instant quotations based on customer buying history, price simulations, stock availability, and delivery dates. If the contact receiving the quotation is not already a customer, the system will automatically create a customer profile, making the information available to the supply chain when the quotation is converted to a sales order. You can assign a different status to each quotation, which helps you maintain a complete overview, and use win/loss and SWOT analysis to help focus future sales efforts. Sales Force Automation can also analyze all sales against a budget or compare a specific activity with a customer against the revenue of that customer.

When it is integrated with Enterprise Portal, your remote employees and salespeople on the road can use Sales Force Automation to get contact data, produce quotations, and update company sales information from remote locations via the Internet. You can even import sales

prospect contact information from third-party database vendors to help identify opportunities and proactively initiate contact with customers and prospects. The mailing feature helps you generate and manage mailings of newsletters, product catalogs, and other material using a selection in the database.

Companywide insight into customers and prospects

Sales Force Automation is integrated with other modules in Microsoft Dynamics AX, giving customer-facing employees and back-office staff real-time information from other relevant parts of the business, so every employee can become a customer expert. For example, using Sales Force Automation, employees can quickly and easily retrieve relevant customer information to help solve customer issues. However, management can decide how much access each department or individual should have to company business information. Also, the system can track every contact with the customer, and trace all transactions.

Back-office staff can use information from the sales process to keep up with demand and limit excess stocks. You can assign percentage probability values to sales quotations to help make more accurate and timely sales forecasts. Data from other parts of the system can also be used to alert colleagues to crucial customer-specific information, such as customers with poor payment records. Use the Note-It function to insert short notes for other users regarding a business relation, contact person, or quotation.

Sales Management

Sales Management in Microsoft Dynamics AX is a window into the heart of your sales operations, providing a detailed view of your sales pipeline. With this solution you can view and analyze the activities and performance of individuals, teams and your entire sales organization, broken down by your choice of registered values.

Are your sales teams going to reach their quotas? Why is one region outperforming another? Which accounts are doing well? Sales Management offers you a set of easy-to-use tools that provide graphical views of key sales-related information. Opportunity and pipeline management are made easier because you can achieve an instant overview of your sales and marketing efforts.

Sales Management is closely integrated with the Sales and Marketing in Microsoft Dynamics AX module to provide efficient collaboration between sales and marketing managers and their teams.

KEY BENEFITS:

- Advanced tool for detailed sales activity analytics.
- Better understanding of the sales pipeline.
- Graphical views for representing large amounts of data in both an easy and understandable way.

Set up sales targets and view performance

Establish and monitor sales targets for each member of a sales unit in the Sales Target window. Once a target has been assigned to an individual, you can browse and modify the targets quickly and simply. A couple of clicks can give you an instant overview of your sales targets. Graphical charts can be set up to give the user a versatile tool to show, for example, your actual sales and quotations compared with sales targets for individuals.

Manage your views of Microsoft Dynamics AX data

To gain a greater insight into large amount of sales data, Sales Management can be set up to give a user greater control of the data. Users can have a panoramic view of values stored on your database and be able to provide the exact views required by your company's needs. For example, if you wish to see your sales data sorted by a specified value, the administrator can open any field for the user to specify groups of data or values returned.

Managing your sales data

To analyze your sales data, you need to see the data stored by the values you decide, and the values you choose to analyze should be the ones that are most important to you. You want to see margins on different types of customers, discounts given by individual sales representatives, or revenues sorted by types of items sold. You can easily track the average sales orders, the sales representatives with the least activities, the number of campaign participants, and more.

The transaction log records the changes users make to selected tables in the system. It provides four different graphs showing, for example, statistics of new customers, prospects, quotations and sales orders within a given time frame, or an activity-level report displaying all sales activities for an individual salesperson, sales unit or company within a selected time period. This helps you get real-time insight into all sales activities, so you can identify opportunities and act on them faster than the competition.

Establish and maintain sales pipelines

The management statistics window shows the status of your entire sales pipeline with a variety of default graphs. Viewing options include the sales phases, probabilities, and actual and possible sales versus target, as well as purchase frequency. To better understand where your business is going you can analyze and compare data from any time period of your sales history.

View your data from multiple angles including costs, revenue, margin, discounts, number of records, highest and lowest values. You can break the sales process into components to see where profits are being won and lost. You can also view your company's performance by the contributions of individuals and groups of employees or by existing and potential customers, to get a detailed, actionable understanding of your sales activities.

Telemarketing

Telemarketing in Microsoft Dynamics AX helps you execute and manage telephone-assisted sales and marketing activities from one connected solution. Designed for sales teams or telemarketing groups, Telemarketing can be used for a variety of activities including sales-lead qualification, customer surveys, and direct marketing campaigns.

Telemarketing is part of the sales and marketing solution in Microsoft Dynamics AX, which also includes sales force automation, sales management, and marketing automation functionality.

KEY BENEFITS:

- Improve sales-lead qualification.
- Execute guided calls efficiently with call center functionality.
- Use data retrieved from the telemarketing activities directly in the sales process.

Improved lead qualification

The effectiveness of telemarketing depends, to a large extent, on the quality of the leads selected for each campaign. Telemarketing helps you draw up targeted call lists based on key customer information stored in your Microsoft Dynamics AX system. You can select customers and prospects using background and relationship-oriented information such as sales district, revenue, relation types, segment and past sales behavior. Telemarketing staff can also use this background information to more effectively identify customer needs.

Once a call list has been created, the Telemarketing module makes it easy to distribute the list to your sales staff based on criteria you choose. For instance, calls can be distributed to your sales people who are responsible either for all contact with prospects, or individual business processes with prospects, or you can distribute them equally among your sales staff. You can follow up on failed calls easily, since the caller can be automatically reminded to repeat the call after a specified period of time.

Execute calls efficiently with call center functionality

To simplify actual calls, Telemarketing provides a single window for managing phone calls. To give you a quick and complete overview, the Telemarketing window combines information on each call in one simple view that presents information about business relations activities, open orders, projects, products purchased, and more.

To navigate directly to other windows of interest, the salesperson just has to click the menu buttons in the Telemarketing window. For example, if a customer would like to place an order during a call, it is easy for the salesperson to create a sales order or quote. By integrating an external Computer Telephone Integration system, calls can be made directly from the Telemarketing window by simply clicking the call button. When the call is finished, the system automatically prepares for the next call in the list. All the caller has to do is click the call button again.

Use telemarketing data in the sales process

Every call made via Telemarketing can be logged for use in the sales process. Using the call log, reports can be generated that summarize the result of telemarketing campaigns. They can also be used to generate new call lists for following up on specific call types such as "Call Back."

If you prefer to use telemarketing for electronic survey purposes or in a guided sales process, you can easily connect a questionnaire to your call list. Responses to your questionnaire are recorded in your database, and can be used to identify and understand your prospects or customer needs in future marketing campaigns.

Warehouse Management (Advanced Management)

Warehouse Management in Microsoft Dynamics AX gives you the flexibility and control to help you optimize your warehouse processes according to your individual requirements. By improving your insight into your inventory and warehouse management tools, you can be better equipped to increase customer satisfaction and reduce your costs.

KEY BENEFITS:

- Obtain a complete overview of inventory to help improve customer service.
- Streamline your warehouse processes to reduce costs.

Increase customer satisfaction

You can reserve items for customers, including items from a specific location or batch, while entering a sales order. This reservation is recognized by all functions in Microsoft Dynamics AX, such as inventory counts, production planning, and others, to help ensure that customer demands are satisfied.

Get a complete overview of your inventory

To track items internally and throughout the supply chain, you can automatically have inventory stamped with an inventory dimension number linked to shipments and deliveries. For improved traceability, Warehouse Management enables you create as many serial or batch numbers for the automatic numbering of items as you require.

Determine the exact location of a specific item in your warehouse by using inventory dimensions, which can include information regarding warehouse batch number, location and serial number. Inventory dimensions are also a powerful tool to track serial and batch numbers, and can be used to get a clear overview of items in your warehouse.

IV. ADVANCED MANAGEMENT ENTERPRISE

For organizations with complex needs, Advanced Management Enterprise extends the Advanced Management Edition by providing a rich set of advanced supply chain management, field service, configuration, manufacturing, and development capabilities on a flat-fee basis. Functionality includes:

- Human Resource Management (Advanced Management Enterprise)
- Production (Advanced Management Enterprise)
- Project Accounting (Advanced Management Enterprise)
- Warehouse Management (Advanced Management Enterprise)
- Balanced Scorecard
- Business Process Management
- Cost Accounting
- Enterprise Portal
- Product Builder
- Questionnaire
- Service Management
- Shop Floor Control

Human Resources (Advanced Management Enterprise)

The Business Essentials additional component Human Resource Management in Microsoft Dynamics AX can give you deeper insight into the status of individual employees, an overview of your entire organization, and the strategic tools you need to develop the human resources upon which your business goals depend.

KEY BENEFITS:

- Identify skill gaps to determine required employee development
- Helps streamline course administration
- Optimize relationships with employees through personalized self-services, using Enterprise Portal.

Make the most of your talent

Human Resource Management provides the structured and usable information you need to quickly assess current performance levels, identify competency strengths and weaknesses, and outline improvement initiatives. Managing employee competence means identifying current competencies and making relevant comparisons to the competencies your organization needs. Professional skills and aptitudes, as well as personal skills, can all be tracked and compared. You can create a competency framework, as well as a dynamic development process that includes personal interviews, training curricula, and events to support employee development in alignment with your company's strategy.

Production (Advanced Management Enterprise)

Production in Microsoft Dynamics AX gives you real-time insight into your manufacturing processes to help increase both your production efficiency and profitability, while helping to reduce your overall costs.

KEY BENEFITS:

- Control the utilization of your manufacturing resources for optimum performance.
- Track production progress and easily make changes to increase production efficiency and reduce costs.

Flexibly manage your manufacturing resources

You can get a quick and reliable overview of the manufacturing resources required to meet customer demand by performing rough capacity scheduling, taking both finite or infinite capacity and materials scheduling into consideration. You also get the flexibility to schedule production processes backward or forward from any date.

Optimize your production flow

You can define your manufacturing resources, including machines, employees, tools or even subcontractors as work centers and allocate them to work center groups. Scheduling can be performed at different levels of detail: operations scheduling for work center groups and job scheduling for individual work centers. You can achieve maximum scheduling flexibility by determining whether finite or infinite capacity should be used for each work center or work center group.

Detailed capacity scheduling can determine the “best fit” between a work center and a specific operation and automatically selects the work center with the shortest lead time. Reduce time spent waiting for the availability of a work center with the option of selecting the “next best” alternative.

Increase your production efficiency

Minimize lead times by creating cross-group links between resources that can handle the same task to help ensure the most efficient scheduling. You can also reduce set-up time by using properties to ensure that operations that require the same work center setup are scheduled concurrently. Advanced facilities for sequence and bottleneck scheduling are provided, which can reduce setup times and make tight, controlled plans on the bottleneck. Production helps complete subcontracting for full or partial production orders by utilizing material flow and planning.

Get real-time insight into production

Production gives you visibility into all the information you need to efficiently manage your production processes, including planned production orders, production start times, capacity loadings, delivery dates, and materials availability. Detailed job monitoring gives you a clear overview of individual work centers’ activities during the course of the day, so that you can assess production performance to schedule.

The job scheduling Gantt chart gives you a real-time, graphical overview of your production schedule so you can make tactical, day-to-day changes that optimize production flow. You can use the Gantt chart to easily schedule changes both within and between different work and machine centers by using simple drag-and-drop functionality, and then see the consequences of your changes on the production floor in real time.

Improve performance with flexible routings

Choose the best route for an operation on any given day. You can set up and maintain different routing versions, including network routes that help you avoid bottlenecks and maximize production efficiency. You also have the flexibility to have routes assigned automatically (using date and/or quantity) by the system, or you can choose to select them manually.

Production provides you a variety of information about the operations that make up your production routes, including an overview of the work centers used and the queue time, set-up time, run time and transport time required for each operation. You can also specify the amount of scrap and calculate the time that is expected to be used at each operation.

Monitor production costs with ease

Production enables you to choose flexible options for recording capacity and materials consumption. You can record consumption and costs prior to production in a forward manner using base data, or record actual consumption during production. Consumption and production costs are automatically posted into the general ledger, which cuts down on manual data entry and quickly enables you to compare actual and estimated production costs.

Project Accounting (Advanced Management Enterprise)

Project Accounting in Microsoft Dynamics AX is a complete and easy-to-use module that helps you efficiently manage project accounting across your company with full financial overview and controls and full real-time integration into supply chain management and financial modules.

Project Accounting provides a strong platform to help you control project finances. It supports a wide range of functions and empowers your company to meet the challenges of growth, while helping to give you the necessary insight into your business that you need to succeed in an increasingly competitive global environment.

KEY BENEFITS:

- Help improve oversight of your operations to maintain tighter control of project accounting and drive efficiencies.
- Help improve productivity.
- Obtain strategic business insight.

Maintain tighter control of projects

Project Accounting can support the accounting needs of multiple project types, such as time and materials, fixed-price, and internal projects such as investment, cost and time, and projects with a work-in-process (WIP) component. By enabling you to deconstruct a large, complex project into manageable subprojects and providing easy-to-use graphical project family trees, Project Accounting helps you rapidly identify and address delays and avoid cost overruns.

You can specify different properties for each project task, such as start or end date, capacity load, or the relationship between tasks. You can also schedule tasks for work center groups or work centers. A Gantt chart is provided to give you an overview of capacity load.

The solution helps you manage day-to-day administrative financial tasks. You can anticipate potential delays by helping you and your employees estimate and record the completion percentage of activities. Your employees can easily register their working hours on-site or

remotely by using the Internet, providing you with an always-updated view of employee hours spent on a project.

Improve cash flow management

Project Accounting serves as a central data repository where your employees can keep the status of their projects registered and up-to-date. Having accurate information enables you to shorten the billing cycle since you can generate invoices immediately and get paid for projects faster. Invoices can appear in the currency of your choice, to suit the needs of your customers and vendors in projects or subprojects. You can also bill multiple projects for one customer by creating a single invoice event whenever you need to. The solution helps you avoid delays and predict major cash outflows by planning when you will need to acquire chargeable equipment and materials throughout a project.

You can keep your customers updated with timely and accurate progress reports, since customers who feel well-informed may be less likely to dispute invoices and more likely to pay on time. If a customer's requirements change throughout the course of a project, you can add revenue by easily adding revenue-producing consumption to the current project in progress or additional on-account transactions.

With Project Accounting, you can also link back-office systems with companies with which you have both a customer and vendor relationship, to offset balances and save time and money in administration.

Improve productivity

Project Accounting can help you define new projects quickly, by pulling data from the central Microsoft Dynamics AX database. You can also speed up project creation by using templates recycled from previous projects. A single view of all current and planned projects helps you anticipate bottlenecks before they appear.

The improved efficiency of Project Accounting also can help you move back-office resources from supporting current projects to supporting sales to help increase new business.

Obtain strategic business insight

Project Accounting helps you build meaningful hierarchies and categorize projects using sorting criteria, so you can understand the true costs of the services you render, and get an accurate and detailed view of profitable. The solution can give you actionable data to help you identify market trends, take on the right projects, and avoid committing to projects that you can't staff or that won't be profitable.

Project Accounting also enables you to use account categories to map parts of a project to general ledger accounts to get a more detailed analysis. You can summarize by project or cost category type, or you can define your own posting structure. You can also categorize transactions based on hours worked, costs incurred, items issued and revenue to be billed. Accounting analysis dimensions provide a powerful way to run detailed analyses without complicating your chart of accounts.

You can obtain insight either from the overall project statistics window, where you can filter among related projects and budget versus actual transactions, or from standard reports, where you can specify various data ranges. Using optional OLAP analysis services, you can present data in pivot tables.

Warehouse Management (Advanced Management Enterprise)

Warehouse Management in Microsoft Dynamics AX gives you the flexibility and control to help you optimize your warehouse processes according to your individual requirements. By improving your insight into your inventory and warehouse management tools, you are better equipped to increase customer satisfaction and reduce your costs.

KEY BENEFITS:

- Optimize your warehouse layout to increase efficiency and accuracy.
- Incorporate radio frequency identification (RFID) technology to identify and tag individual items.

Optimize your warehouse layout

Warehouse Management for Microsoft Dynamics AX gives you the flexibility to define your warehouse layout according to your changing needs, so you can achieve optimum warehouse efficiency. Establish high- and low-priority storage areas for optimum placement of goods and block locations to restrict movement of goods. Divide your warehouse into zones to accommodate different storage needs such as temperature requirements or the rate of turnover of various items. You can specify warehouse locations on five levels: warehouse, aisle, rack, shelf, and bin, and define each location based on parameters such as space and pallet type. In addition, you can either control how items are stored based on predefined location rules, or have the flexibility to randomly manage item storage.

Increase your warehouse efficiency and accuracy

Warehouse Management helps you allocate warehouse space efficiently by automatically identifying optimal storage locations for items, based on item characteristics and warehouse zones. All warehouse activities are recorded in journals, so you can recreate a complete history of actions and item identifiers using an audit trail. Either barcoding or RFID can be used to increase the speed and accuracy of picking and putting away of items.

Warehouse Management also helps you determine the most logical sequence of picking locations to optimize your picking routes and to speed up order fulfillment. Picking routes are allocated by the system based on parameters such as zones and height of locations. Several orders can be included in one route to enable better use of pallet loads and further increase warehouse efficiency. You can achieve faster picking and packing with good visibility into possible pick locations from the shipment. Advanced shipping notices help you to send information to the receiver to let them know what they are going to receive in advance. And you can improve overall efficiency with transfers, using lead time and item tracking, even including bills of lading, when moving items between warehouses.

You can also register goods as they arrive at the warehouse, so that they are visible throughout the system before they have been placed in inventory. You can also specify locations of items in your warehouses by using pallet IDs and RFID technology.

Balanced Scorecard

Balanced Scorecard in Microsoft Dynamics AX is a tool that can help translate your visions and strategies into an integrated set of performance and action measures that cascade down through the organization from divisions to departments, through operational units, and down to the individual employees. With Balanced Scorecard you can monitor and optimize your business performance.

Reaching your goals requires attention to and monitoring of your business. With Balanced Scorecard you can keep your business moving in the right direction by turning your strategic goals into tangible targets based on objectives and measures.

KEY BENEFITS:

- Reflect and communicate your organization's business strategies, objectives, and measurements.
- Automate the collection and summarization of performance data.
- Evaluate your overall business performance according to your strategy.
- Track performance and measure fulfillment of business goals.
- Obtain real-time overviews of objectives and measures, so you can take immediate action.

Obtain great advantages

Balanced Scorecard exchanges information with other functional areas in Microsoft Dynamics AX to deliver in-depth analyses of key areas of your business. You can quickly and simply monitor progress toward your goals and react quickly to performance trends.

Track your business performance

Your goals can be broken down into measurable targets for each organizational unit—right down to the individual employee. Once these targets are entered into Microsoft Dynamics AX, progress toward achieving them is continually tracked using a range of data such as financial and operational measures, customer satisfaction data, and overall growth.

Get a real-time overview

All automatic and manual measurements are recorded as transactions within time periods that coincide with selected key performance indicators (KPIs). As a result, you can compare your budget and the actual numbers in the form of transactions both online and in real-time.

Support for external measurement

Work in a goal-oriented and balanced way with performance-related information pulled from different IT systems such as Microsoft Office Access, Microsoft SQL Server and Oracle data dictionaries, or Excel spreadsheets that provide you with direct access to the most relevant, business-critical information.

Business Process Management

Business Process Management in Microsoft Dynamics AX provides the actionable information you need to develop and manage your business processes by identifying key factors that support your business strategy.

KEY BENEFITS:

- Increase the knowledge and motivation of your employees by communicating key strategies and progress.
- Establish the link between high-level strategic planning and operational-level execution.
- Get a more holistic view of your business processes.

- Improve productivity by helping ensure that employees follow the correct sequence of actions in a business process.
- Track the status of all actions and check that they are followed up appropriately.
- Assess current performance levels, identify strengths and weaknesses, and outline improvement initiatives.

Effective planning and action-oriented information

Making a decision and following through with appropriate action is easier when your employees have a goal or strategy in mind. Action-oriented information is essential when setting clear goals for individuals or businesses.

Focus on goals and actions

Help ensure that strategic processes become a natural part of every employee's daily work and get the most value from your resources. Create a shared understanding of the organization's focus and goals.

Flexible action management

Business Process Management helps users establish and manage actions. When you set up actions, the program automatically helps ensure that your employees follow a standard structure, with followup as a natural part of action planning. Using the structured and intuitive tools of Business Process Management, your employees can focus on what's important, by defining personalized actions, setting their own priorities, and selecting and sorting various types of information such as action status, responsible persons, and date intervals.

Accelerate business performance

Align managers and employees with your business strategy and improve accountability by directly linking employees' daily work to the company's strategic goals, and plainly show employees how their efforts contribute to company results.

Increase transparency in your business processes

Increase your employees' motivation and productivity by letting people at all levels openly see the measures that matter to them. You can still help protect the confidentiality of your business information because managers have the ability to control access to sensitive data.

Cost Accounting

Cost Accounting 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, you can measure in detail the economic performance and profitability of your business operations and business units.

KEY BENEFITS:

- Analyze costs relevant to your business and business model.
- Get powerful allocation schemes that match your business model.
- Plan and calculate future cost based on budgets and forecasts.

Analyze costs relevant to your business and business model

Cost Accounting enables you to analyze distinctively fixed and variable costs for a better understanding of the cost incurred and their relation to business volume. You can map your chart of accounts through cost categories which can help you convert and interpret financial information into costing data. Dedicated cost accounting functionality also helps you to adjust, correct, reallocate or accrue costs and improve your insight into your economy, without making changes in your general ledger. In this way, you can maintain tight control over your business data while making correct and relevant analyses in your decision-making.

Cost Accounting gives you the power to perform different types of analyses, such as absorption costing, marginal costing, pre-planned costing, and more, so you can select the costing methodology most relevant to your business model. You can also use any of your analytical dimensions as costing objects and define multiple versions of allocation schemes relevant to your business.

Get powerful allocation schemes that match your business model

With Cost Accounting you can run multiple, concurrent versions of cost calculations analysis for actual, pre-planned, what-if, or future considerations based on distinct allocation schemes. Powerful allocation, distribution and apportionment tools also help you build the allocation schemes you need. You can charge and flow costs among your costing objects, while tracing and analyzing the cost flow in your business model through dedicated debit and credit transactions.

Cost Accounting helps you allocate or apportion costs based on usage quantities and through cost rates. You can manually register quantities, import, or recover them from the integrated production and project finance functionalities inside Microsoft Dynamics AX.

With Cost Accounting, you can build multilevel structures mapping cost categories and analytical dimensions. You can match your needs for analytical and aggregated reporting while using the structure as a basis for aggregated costs allocation in your allocation scheme.

Plan and calculate future cost based on budgets and forecasts

With Cost Accounting, you can also calculate future planned cost flows and cost rates based on forecasts and budgets, helping you predict the impact of business decisions on your bottom line or set the goals and benchmarks for the coming periods. You can perform cost flow analyses based on budgets and use the results to measure variances against actual cost. With the flexible budget facility, you can increase your understanding of deviation to plan by identifying variance relating to fluctuation in activity volume.

Enterprise Portal

Enterprise Portal in Microsoft Dynamics AX enables your customers, vendors, business partners, and employees to directly access relevant business information and conduct business transactions with Microsoft Dynamics AX through personalized, role-based Web portals via the Internet. With Enterprise Portal, you can increase the speed of doing business while driving down costs.

KEY BENEFITS:

- Connects you with customers, vendors, and other partners.
- Provides you with a customized Web access for business application information and functionality.
- Helps increase your return on investment.

- Improves collaboration and content management.

Get cost-effective connectivity

Streamline business processes and extend the reach of information within your organization and between business partners. Enterprise Portal helps reduce transaction costs and manual paperwork by using the Internet to connect employees and business partners. It offers anytime, anywhere access to back-office information and functionality to those in your business community, and it can help you reduce your IT maintenance and administration costs. Enterprise Portal delivers a familiar Microsoft-based user interface to your users, which simplifies training and lowers training costs, while at the same time providing a positive experience for external users. Enterprise Portal deploys quickly and allows multiple locations to access data from a single database, which makes it easy and inexpensive to maintain across the organization. Changes made in the database are reflected instantly across the system, to both internal and external users.

Tailor Web portals for each user

Share, interact, and collaborate using personalized, role-based Web sites. With Enterprise Portal, you can customize Web portals based on a user's individual needs and job function. Predefined roles simplify set up and enable you to give employees and business partners access to only that information that is relevant to their job function—no more and no less. Individuals can further personalize their Web sites by adding or removing information fields or functionality to quickly and efficiently help them get the most out of the system.

Allow customers to help themselves

Use the Internet to deliver company and product information to your customers. Enterprise Portal allows access to critical business information regardless of time zones, languages and geographical barriers. With Enterprise Portal, you can open your business around the clock, every day of the year, and your customers, vendors, and other business partners can do business with you the way they want.

With Enterprise Portal, you can also offer your customers the same service they would get from a large call center by setting up relevant FAQ Web pages and online customer service centers to handle common questions and demands. By putting routine business information on the Internet, you will save customer service resources while increasing your responsiveness.

Empower your employees

Offer anywhere, anytime business information access to your employees through a Web browser. With Enterprise Portal, your employees won't waste time looking for information, because the information they need to make accurate and quick business decisions is delivered directly to their Web portals. Employees can use the advanced search functionality to track down business information from both the transactional data and collaborative data.

Your employees working on remote sites or on the road can use their Web portal to input hours and project data to keep your business information up-to-date, regardless of where they are. You can also connect other employees who don't need the complete Microsoft Dynamics AX client access. External contacts who previously worked outside your company's business management system (for example, with outdated paper reports) can use Enterprise Portal to connect and work directly with your business data. Enterprise Portal provides the platform for employees to collaborate and share content electronically and can help improve productivity.

Connect with partners

Open your business to partners and enable them to communicate with you at their convenience. Use Enterprise Portal to simplify and automate inefficient manual communication and transactions. Optimize your business relationships by communicating with your partners in their language, using their currency and following their national business regulations.

Increase return on investment

Increase return on investment for your entire solution by increasing efficiency and extending the reach of your current business management solution or legacy applications. Enterprise Portal allows you to provide quick and affordable information access to all employees and others in your business community. This helps ensure more efficient distribution of information resulting in more profitable business decisions. With Enterprise Portal, you can reach out to new customers easily and efficiently, and on their terms, which can give you competitive advantages and help deliver on the promise of e-business.

Product Builder

Product Builder in Microsoft Dynamics AX simplifies and streamlines the process of ordering, planning, and producing customized products, helping you to win more orders and increase customer loyalty.

KEY BENEFITS:

- Your customers, vendors, and employees can easily configure customized products.
- Delivers customized products faster and cost-effectively by reducing the manual work involved in designing, planning, and producing them.
- An easy-to-use system that adapts to the needs of your customers and employees.
- Product Builder is designed to work with other key functional areas of the solution such as master planning, production, sales, and purchasing to shorten delivery cycles and optimize product design and production planning.

Efficient configuration of customized products

Both your customers and employees can use Product Builder to configure customized products and quickly obtain accurate pricing and delivery dates. Employees can also configure products using Product Builder through Microsoft Windows® client.

Product Builder helps you create flexible product models by using a drag-and-drop interface to define each product's configurable options according to variables such as color, size, and materials. Products can then be configured to match your customers' individual requirements based on the options provided in the product models.

When the product has been configured, your customers receive up-to-date pricing and delivery information based on their choices. Because Product Builder links to other modules within the solution, updates to products, prices, and lead times are automatically reflected across the system. Your customers can always be kept up-to-date on the status of the products they want.

Deliver customized products faster and more cost-effectively

Setting up the product models in Product Builder is fast and efficient and reduces the potential for error. A wizard guides you through a series of menus and options, letting you define the criteria for the product models that are then used to configure products for individual orders.

When products are configured, the bills of material (BOMs) and production routes for each sales line are automatically generated. This results in less manual work required in production planning and scheduling and speedier delivery of customized products to your customers. Pricing is also automatically calculated for each item on the configured BOM. And, because Product Builder is connected in real time to Master Planning in Microsoft Dynamics AX, delivery dates can be calculated immediately with consideration of on-hand inventory and available capacity.

Changes to product specifications are easily managed within Product Builder. Because BOMs are defined at the moment that products are configured, changes made to product models are instantly reflected in BOMs. This avoids the need to manually change hundreds of BOMs when altering a product specification.

Questionnaire

To compete successfully, you need to know much more about your business than just the financial numbers. You need to find out how your customers, business partners, and even your employees feel about your company, products, services, and business practices. Questionnaire in Microsoft Dynamics AX gives your staff the tools they need to create and execute incisive, easy-to-use questionnaires, and to process and understand the precious intelligence that comes back from the market.

Questionnaire allows you to store your knowledge from surveys in the same system that you store your daily business interaction knowledge. It is easy to design, test, plan, distribute, and execute surveys.

KEY BENEFITS:

- Collect tangible and intangible information from respondents with a minimum of effort.
- Design and execute questionnaires easily.
- Deploy questionnaires over corporate intranets and external Web sites.
- Turn raw data into useful information through analysis.

- Questionnaires are an integral part of Microsoft Dynamics AX.

Powerful user-friendly functionality

You can design effective questionnaires quickly and simply without any technical experience. Business managers, human resources, marketing and administrative personnel can all design and implement questionnaires in a matter of minutes. You are provided with all the tools you need to get your research done.

Design Questionnaires for specific target groups

Questionnaire supports your business processes and can be used to gather feedback from your customers, vendors, or employees. You can design questionnaires for a range of activities including customer or employee satisfaction surveys, market research, job development dialog, ethical and environmental measurements, and management and staff testing.

Easy to plan and distribute

It is easy to plan and distribute questionnaires for a range of audiences. The planning functionality offers easy administration of mail correspondence with target groups inside and outside your organization. Questionnaire provides extensive help with finding and addressing target audiences for questionnaires, as long as they are already listed in the system.

Analyze results with statistical tools

Efficient integration gives you one comprehensive evaluation tool that functions across your entire business ready to cross-analyze with existing business information. Questionnaire also supports a large number of statistical analysis tools.

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.

Designed for simplicity and ease of use, Service Management can support a wide range of service operations. Your service people can easily create agreements tailored to customer requirements and access service orders, contract details, and repair histories to quickly respond to customer queries. Flexible capabilities and full integration with Microsoft Dynamics AX enable companies to plan service orders proactively, manage costs effectively, track current service resource consumption, and analyze past use from both service and financial perspectives.

KEY BENEFITS:

- **Meet demanding customer needs.** Ideal for companies that support customized, changing service requirements, Service Management streamlines the process of creating and maintaining a wide range of service agreements.
- **Manage financials more effectively.** Tight integration with Project Accounting in Microsoft Dynamics AX enables managers to track exact costs for service orders, monitor and manage invoicing, and handle multiple revenue models based on resource consumption or periodic payments.
- **Drive efficiency to keep costs down.** Optimize resource use with automated planning for service orders; save time and reduce errors with integrated processes that reduce data re-entry and update information automatically across your business system.

- **Transform service operations into business profitability.** From identifying recurring product issues to understanding problem resolution ratios, running customer feedback reports, and building detailed profit-and-loss analyses, Service Management enables you to transform service information into profitable insight.

Shop Floor Control

Shop Floor Control in Microsoft Dynamics AX automates the collection of employee time and attendance information, as well as project and production data, giving you accurate and detailed insight into your production environment.

KEY BENEFITS:

- Improve the efficiency of your shop floor operations with fast registration of accurate and real time production information.
- Reduce manual data entry with automated collection of employee time and attendance.
- Save administration time by generating your shop floor payroll quickly and flexibly.

Fast registration of production and project information

Using Shop Floor Control, accurate production information is available faster and in more detail than if it were collected manually. Employees can register the time used and the raw materials consumed for individual jobs or operations. Time used on activities relating to particular projects can also be registered in combination with Project Accounting.

For increased accuracy, this solution supports registration of information by using barcodes. Barcodes are automatically printed on all relevant production and project reports. To minimize the number of employees entering data relating to the same job, a team leader who controls the other employees' registrations can be appointed. Using a team leader saves time, simplifies the process, and lowers the risk of data entry errors.

Shop Floor Control also enables you to bundle jobs to save time on registration. Employees working on several jobs can register time on all of these jobs simultaneously.

Automated collection of employee time and attendance

Shop Floor Control can significantly decrease the time you spend performing administrative tasks, while increasing the reliability of employee time and attendance data. Time profile schedules can be set up for each employee and the specific profile is selected automatically every time an employee logs in. For example, the time profiles can be set up in groups for day, evening or night shifts, or as detailed as one specific profile per employee.

Shop Floor Control includes functionality for effectively tracking and managing non-productive time and absences. You can create your own categories such as illness, meetings, training or vacation to define non-productive time. This lets you track your employees' time away from work more precisely, and helps you better analyze your use of resources.

Shop Floor Control is easy for your employees to use. Simple operational functions and user-friendly screens minimize training needs for employees. Reports are clearly visible on-screen, so users can see the data they are delivering to the system.

Fast and flexible payroll generation

Today, many businesses need to be flexible when it comes to handling employee pay, overtime and holidays. Shop Floor Control is designed to handle complex pay arrangements, and even

gives you the option of letting individual employees define if their overtime is paid or used as time off. It is also possible to integrate payroll data with an external payroll system, and use payroll periods for grouping or limiting transactions.

Shop Floor Control automatically calculates payroll for individual employees based on pre-defined pay agreements which specify different pay types such as standard time and overtime. Piecework facilities are also supported as an integrated part of the pay agreements, so you have the flexibility to define that pay is calculated by output instead of hours worked.

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like and with familiar Microsoft software, automating and streamlining financial, customer relationship and supply chain processes in a way that helps you drive business success.

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