What's New in Microsoft Dynamics AX 2009

New Functionality Name	AX Version In Which This Feature Was Introduced	AX Module Name	New Functionality Description
Version Control integrated to Visual Studio Team System	2009	Configuration and Development	Version Control with integration to Visual Studio Team System for team development and Code Upgrade.
Workflow Template Editor	2009	Configuration and Development	Workflow Template Editor is now available in AX 2009.
Address information is added to the new Site form	2009	Core	You can enter and store address information for a site.
Create multiple sites within a company	2009	Core	Use multiple sites within a company to gain better insight into the company
Activate the multisite functionality	2009	Core	After you have set up your site structure, you can activate the multisite functionality using the Multisite Activation Wizard. This results in the following: 1) The site dimension becomes active in all inventory dimension groups. 2) The site dimension becomes mandatory and must appear on all inventory transactions. You can implement the multisite functionality on a company basis when you install Microsoft Dynamics AX or upgrade from earlier versions of Axapta or Microsoft Dynamics AX
Enhanced business intelligence framework	2009	Core	Ability to use the new OLAP framework to automatically generate SQL Server Analysis Services 2005 dimensional models from Microsoft Dynamics AX metadata directly brings opportunity to consolidate middleware analytical tools.
Improved user interface and navigation	2009	Core	Buttons and controls used in Microsoft Dynamics AX now look and work in a manner similar to the controls used in Microsoft Office 2007.
Export to Excel option	2009	Core	You now can export information from almost any form in Microsoft Dynamics AX using the Export to Excel option on the Command menu in a form.
Predefined job-specific Role Centers	2009	Core	A number of pre defined Role Centers present job-specific information based on roles within the organization to help people easily prioritize tasks and make quick business decisions.
Global address book	2009	Core	The global address book is a centralized form where you can store information about customers, vendors, business relations, contacts, employees, and anyone else that your company interacts with. It is a repository for every person or organization that your organization comes in contact with. You also can track employee information in this table. Information about all of these people is tracked in this form. Customers can be linked to each other across all of Microsoft Dynamics AX, and multiple entities can be assigned in the form, as well.
Directory view	2009	Core	The directory view provides a graphical representation of entities in your Microsoft Dynamics AX system: 1) the hierarchy of companies, organization units, jobs, positions, and employees. 2) companies, reporting managers and positions. 3) companies, sites, and warehouses, production units, work center groups, work centers, inventory aisles, and locations.
Print management enhancements	2009	Core	One can now manage the content of business documents and generate and deliver them in a consistent way: the number of copies to produce footer text in multiple languages and print destinations at the module level; print management settings can be specified for specific accounts or transactions.
Time zone support added	2009	Core	Multiple time zones are supported, information in date and time fields is displayed in the user's preferred time zone. For the multinational organizations, users no longer should keep time zone differences in their memory.
Integration with Communication Server	2009	Core	Improved efficiency of communication between employees, customers and vendors as Microsoft Dynamics AX 2009 integrates with Microsoft Office Communicator to provide "presence indicators" in the Global address book, based on the schedule information that is saved in that person's Microsoft Outlook Calendar.
Personalized Role Centers present job-specific information and enhance personal productivity	2009	Core	Role centers enable employees to work more efficiently, by getting needed information in their front page
Role centers linked to community sites	2009	Core	Role center pages link to Microsoft Role Tailored Community sites, where users can learn from and collaborate with others in their professional discipline.
Task Recorder tracks actions in application and provides step-by-step guide describing process	2009	Core	Super users may easily record best practice system usage and easily share with colleagues
Transaction tracking	2009	Core	Each time that a transaction that affects ledger accounts is created or modified, the date and time of the transaction and the user name of the person who created or modified the transaction is tracked in the application database. This allows backwards traceability and decreases auditing costs.
Workflow	2009	Core	One can use workflow functionality to create individual workflows, or business processes, defining how a document flows through the system by showing who must process and approve a document, a number of available reporting and business intelligence features may bring transparency to status tracking and overall process control. Workflow also can be used by partners and customers to implement additional task and approval-based workflows.
Select user interface language for the client and Enterprise Portal	2009	Core	When user selects a user interface language on the client computer for Microsoft Dynamics AX, that same language will also be used on the Enterprise Portal.
Batch processing enhancements	2009	Core	One can now run batch jobs on an AOS instance without a client (in a specific processing order and parallelism) and manage all running batch jobs in the environment from a single form.
Import leads and business sectors	2009	Core	You can import files to create records for lead records and business sectors.
Define sales processes	2009	Core	You have the flexibility to create multiple types of sales processes for the different functions in CRM, such as qualifying leads, telemarketing, campaigns, and sales.

Feature	Year	Category	Description
Sales force automation (SFA) integration with Enterprise Portal	2009	Core	This feature provides the flexibility to make organizational decisions. Employees are allowed to access all of the functionality and information they need to perform their jobs without installing additional applications on their computers. Also, salespeople can log on from any computer that has an internet connection, which extends their ability to close more deals. If your organization outsources departments, you can still retain ownership of the data by allowing vendors to access the information from the main database.
Responsibilities in CRM	2009	Core	Because every organization has different processes for various activities, such as marketing campaigns or sales, you now can identify process steps for each activity and then assign the functions to the appropriate individuals.
Lead and Opportunity management in CRM	2009	Core	Lead management in CRM: You can gather and store information about the potential purchase of a product or service by centralizing information. You can create, review, update, or delete information about leads, and you can define rules and create stages or activities that will assist you in qualifying or disqualifying a lead. You also can associate responsibilities, employees, campaigns, and questionnaire tracking to your stored information so that you can turn leads into opportunities and acquire customers. Opportunity management in CRM: You can create, develop, and close sales deals while tracking the information through a central location. All contacts, competitors, partners, products, quoted prices, quantities, and sales stages are stored together to ensure that you always know where a potential sale is in the sales process.
Energy consumption and greenhouse gas emissions tracking	2009	Environmental Sustainability	Energy consumption and greenhouse gas emissions tracking is now available in AX.
Compliance module site	2009	Financial Management	A central improved Enterprise Portal's location to view and monitor compliance-related information. Organization can use this site to store process documents and view database logs, reports, charts, and key risk indicators. Monitoring this information in a central repository will help employees to better understand compliance requirements and how they integrate with organization's business processes.
Post net income and net loss to multiple dimensions	2009	Financial Management	You can post net income or net loss amounts to multiple equity and dimension combinations during the year-end closing process.
Combine Intrastat data transactions that have the same tax exempt number	2009	Financial Management	You can combine Intrastat data transactions that have the same tax exempt number to easier extract statistics.
Inactivate a vendor bank account	2009	Financial Management	Use the new Active date, Expiry date, and Status fields in the Vendor bank accounts form to change a vendor bank account to an inactive status. Doing this prevents funds deposition to the vendor bank account that is no longer used , or is not ready to accept payments.
Define remit-to addresses	2009	Financial Management	Remit-to address (in addition to the primary address) for each vendor can be defined, to be used as the payment address for the vendor.
Withholding tax transaction text	2009	Financial Management	You can now identify withholding tax transactions with the payments that they are associated with more easily. The transaction text entered in a payment journal is copied automatically to the withholding tax record when the payment is posted. You can use the new Vendor transaction inquiry form to query on withholding tax transactions.
Centralized customer statements	2009	Financial Management	You can now print customer statements from one company (the statement company) on behalf of other companies (the activity companies) in your organization. You can receive payments in either the statement company or an activity company. This feature reduces analysis and communication overhead, in addition transparently represents Group's interest.
Look up payment customer number by invoice number	2009	Financial Management	Accounts payables can enter or select a single invoice number when you enter customer payments in a payment journal. The customer number is available automatically, based on the invoice number. A payment journal line is created for the customer, and the invoice is marked for settlement.
Check reversals journal and Deposit slip payment cancellations journal	2009	Financial Management	You can use two new journals to review payment reversals and cancellations before rejecting or posting them. In previous releases, when you clicked the Payment reversal button in the Check form or clicked the Cancel payment button in the Deposit slip form, the reversal or cancellation was posted immediately. Now you can either post immediately or review reversals and cancellations before you reject or post them. Reviews might help prevent fraud and identify errors.
Fill utility	2009	Financial Management	The fill utility allows users who have the proper security settings to automatically mass update a range of records at the same time instead of updating each record individually.
General ledger reason codes and transaction hold	2009	Financial Management	You now can enter a reason for journal transactions in the General ledger, using a Reason code and a Comment, and enter an expanded number of characters for transaction text. In addition, you can prevent a voucher from being posted until a specified date. Entering a future release date places a transaction on hold, which prevents posting while making the transaction available for review and analysis.
Mandatory payment preference	2009	Financial Management	You can set up a ledger account to require that a payment preference is required when a transaction is posted to that account.
Taxes and ledger accounts	2009	Financial Management	You can set up General ledger so that a tax direction has to be entered for each account. You also can restrict the tax codes that are allowed for any specific ledger account.
Tax groups for free text invoices	2009	Financial Management	You can specify that a tax group is mandatory when you create a free text invoice.
Ledger account categories	2009	Financial Management	You now can classify a ledger account by a ledger account category, which is a new attribute for ledger accounts
Track budget revisions	2009	Financial Management	You can revise a budget in the Ledger budget form and view the budget changes, as well as the original budget amounts. If you track revisions for a budget, you cannot modify or delete existing budget amounts, but instead, you can create separate budget revision lines in the Ledger budget form.
Quickly view payment history from the Vendors form	2009	Financial Management	Users can now quickly access payments that company have made to a selected vendor using the new Payment history menu option from the Inquiry button in the Vendors form.
Reversing ledger entries	2009	Financial Management	You now can create reversing entries in the general journal. When a transaction with a reversing date is posted, the original transaction is posted, based on the transaction date, and the transaction reversal is posted, based on the reversing date.
Tax groups for customers and vendors	2009	Financial Management	You can specify that a tax group is mandatory for customers and vendors. You also can restrict the tax codes that are allowed for customers and vendors, and you can specify a default tax group for customer and vendor groups.
Tax groups for inventory management	2009	Financial Management	You can specify that a tax group is mandatory for items. You also can restrict the tax codes that are allowed for items, and you can specify a default tax group for the item group.
Track additional vendor profile information	2009	Financial Management	Several fields are added to the Vendors form, so it is easier to comply with a government contract that requires company to work with a vendor who matches a specific profile.
Tracking a customer using a government ID number	2009	Financial Management	One can now enter a government-established identification number for an organization, it can be assigned to an Accounts receivable customer record as a unique identifier for the record. System can require users to enter the ID numbers always, or only if the customer's credit exceeds a specific amount.
View a check total in the Vendor payment journal report	2009	Financial Management	You can view the total number of checks associated with each payment journal in the Vendor payment journal report. Use totals to easily verify that physical checks match total checks.
Assign payment types to methods of payment	2009	Financial Management	Associate a system-defined payment type, such as Check, Electronic payment, or Promissory note, together with user-defined methods of payment. Use payment types to validate electronic payments, or to add another level of clarification to user-defined methods of payment.

Feature	Year	Module	Description
Centralized vendor and customer payments	2009	Financial Management	Organizations that are comprised of multiple companies can now create and manage payments using a central company. This eliminates the need to enter the same transaction in multiple companies and saves you time by streamlining the payment proposal process, the settlement process, open transaction editing, and closed transaction editing for cross-company payments. Intercompany accounting now includes options to determine which company within the organization will receive the realized gain or realized loss transactions, and how cash discount transactions that are related to a cross-company payment will be handled.
Intercompany eliminations	2009	Financial Management	You can set up elimination rules to create elimination transactions in a company specified as the destination company for eliminations (the elimination company). The elimination journals can be generated during the consolidations process or using an elimination journal proposal.
Automatic allocation processing	2009	Financial Management	You can define allocation rules to distribute posted amounts to destination accounts or to dimensions at any time from automatically created journal entries.
Sales and purchase orders support multisite and site-specific financial dimensions	2009	Financial Management	Sales and/ or Purchase order default values have been changed to support multisite and to ensure that default financial dimensions can be specific to a site.
Set up reason codes for Accounts receivable	2009	Financial Management	You can now set up Reason codes using the Reasons form from within Accounts receivable. Reasons are entered for transactions to provide standard explanations and to allow more efficient tracking.
Additions form	2009	Fixed Assets	You can track improvements and add-ons to existing fixed assets. In the Fixed assets form, click the Additions button to display the Additions form. The Additions form is useful to track an improvement to an existing fixed asset, such as a paint job, or to track a related asset that cannot exist on its own, such as a battery for a laptop.
Create new fixed assets from Accounts payable	2009	Fixed Assets	For purchase orders for new fixed assets, you can create a new fixed asset in Fixed assets when the packing slip or invoice is posted. When you select the New fixed asset field and then post a packing slip or invoice, a new fixed asset is created with a Not yet acquired status. You can also specify whether posting the invoice changes the status of the new asset to Open and posts an acquisition transaction for the asset. In previous releases, you could create a purchase order only for an existing fixed asset, and posting an invoice always posted an acquisition transaction and changed the asset to an Open status. Use new fields in the General ledger parameters form to specify whether to continue to use the existing method. You can also specify that only a specific user group can post asset acquisitions from purchase orders or invoices, and you can use acquisition proposals in the Fixed assets journal to retrieve purchase invoices that involve an asset.
Capitalization threshold	2009	Fixed Assets	You can specify a Capitalization threshold for an asset group. For assets in the group that cost less than the threshold amount, the Depreciation check box on the Value model form is not selected, and the depreciation will not be taken for the asset. You can also group similar items that you consider as a single asset. To track assets of this type, Quantity and Unit of measure (UOM) fields have been added to the asset record.
Linking assets and projects	2009	Fixed Assets	You can associate a project with the assets affected by the project. Each phase or task within a project can be linked to one asset. This allows you to quickly review from the asset record a summary of the projects that have caused any type of work, maintenance, or improvement against the asset.
Reverse fixed asset transactions	2009	Fixed Assets	Now there is an automated process to fix posting errors: user can reverse fixed asset transactions except "Inventory to fixed asset" acquisition transactions and all related transactions that were created when the original transaction was posted. Also, for Accounts payable and Accounts receivable transactions that you could reverse in previous versions, you can now reverse those transactions even when fixed assets are associated with them.
Enhanced asset tracking	2009	Fixed Assets	Three new Fixed asset setup forms are added to Microsoft Dynamics AX: 1) Acquisition methods 2) Asset conditions 3) Major types
Provide reasons for changes	2009	Fixed Assets	You can now enter a reason for a fixed asset transaction or for a change to the Service life, Depreciation periods, Expected scrap value, and Sales value fields. You can also use the new Change history inquiry option from a value model or depreciation book to view a history of changes to these four fields. More useful than transaction text alone, reasons allow you to view transaction history by reason code and help auditors to reconstruct asset transactions and changes. You can specify whether reason codes are required when you set them up.
Reverse an asset transaction even if it is not the latest transaction	2009	Fixed Assets	In previous versions of Microsoft Dynamics AX, the ability to reverse or revoke fixed asset transactions or Accounts payable and Accounts receivable transactions associated with fixed assets was limited to the last transaction posted to the value model or depreciation book for the asset. That limitation has been removed.
Update replacement costs and insured values form	2009	Fixed Assets	In previous releases, user had to manually increase the replacement cost or insured value for each fixed asset, now the replacement cost and insured value for selected fixed assets can be changed using a new Update replacement costs and insured values periodic form. For example, the replacement cost can be increased by three percent for all office furniture.
Performance management	2009	Human Resource Management	Organization can now implement effective, end-to-end processes and policies in Human resources to improve performance throughout organization. This includes improved tools for identifying, developing, and tracking employee skills, and setting, and monitoring employee goals and activities. Additionally, interaction with compensation management facilitates transparent pay-per-performance guidelines. Transparency in employee goals increases employee focus for the measured activities.
Compensation management	2009	Human Resource Management	Human resources for Microsoft Dynamics AX now provides a suite of compensation management functionality, including the ability to define various compensation plans for both fixed salaries and variable (or incentive) packages. Organization can run controlled compensation processes, capture compensation transactions that can interact with a performance management system to facilitate pay for performance, and produce comprehensive, easy-to-use reports and analytics. Transparent performance related compensation increases employee focus to the measured productivity areas.
Employee setup	2009	Human Resource Management	Updated Employee form is single entry for the employee information that integrates with both Human resources and Payroll. Single data entry decreases human errors.
Support for compliance with Form I-9	2009	Human Resource Management	Organization can collect, store, and retrieve information that is needed to support employment processes.
Support for Compliance with the Disabilities Act	2009	Human Resource Management	Improve your company's ability to handle requests for special accommodations made by applicants and employees in relation to one or more specific tasks required by a position.
Activity centers for sales and operation plans	2009	Master Planning	The activity centers allow demand planners, supply planners, and operational planners to work together to create sales and operations plans.
Create demand and supply plans by using Microsoft Excel	2009	Master Planning	You can use Microsoft Excel for the following sales and operations planning tasks: 1) Create sales forecasts for individual sales territories and regions by adjusting the base forecast 2) Create a corporate supply plan, based on the demand plan, by adding constraints to resources and adding capacity. 3) Adjust sales forecasts and adjust capacity for supply plans. The individual Excel sheets are updated with data from the analysis server database, and you can then adjust the plans to balance supply and demand.

Feature	Year	Module	Description
Improved master planning performance	2009	Master Planning	Improvements to the accuracy and speed of running the master scheduling calculations and master requirement planning (MRP) performance: 1) Bottleneck scheduling - You can designate a work center as a bottleneck, and you can set a bottleneck scheduling time fence to activate finite scheduling for the work center. 2) Master planning helper - You can run concurrent processing of master plan calculations.
Master planning bills of materials (BOM) and route	2009	Master Planning	When you run master planning in a multisite environment, the demand at the end item is exploded (driven down to the component levels) according to the dimensions that have been set up for each item, and for the route that is specified for the site.
Master planning in a multisite environment	2009	Master Planning	Master planning in a multisite environment is supported by the following features: 1) As part of the coverage settings for an item, you can specify a vendor for specific coverage dimensions. 2) You can define item coverage settings for a subset of inventory dimensions that are set to be master planned by dimension. You can do this manually or using a wizard. 3) In certain situations, you can change the default planned order type that is generated during master planning. 4) To modify coverage settings, you can access the Item coverage form directly from the Net requirements form 5) The Dimensions tab on the Item coverage form shows all of the active inventory dimensions for the selected record
Time zone and delivery date control per site	2009	Master Planning	You can specify order entry deadlines per site, which takes into account that sites might be located in different time zones.
Use multiple versions of prices	2009	Master Planning	You can define, maintain, and calculate multiple versions of prices and cost prices when you do your bill of materials (BOM) calculations.
Bill of materials (BOM) and route version selection	2009	Master Planning	During planning of materials and resources, the automatic selection of the BOM version and the route version also includes the site, when it is specified. For a BOM version that is not site-specific, you can assign the BOM line consumption to a work center as an alternative to using the issuing warehouse that is stated on the BOM line.
Multisite support for product builder	2009	Product builder	The product builder supports the following configurations: 1) Single site 2) Multiple sites 3) Multisite inactivated. By default, the assignment of site ID on configured bills of materials and routes will originate from the sales order line unless specifically overwritten by product model logic.
Product builder rule debugger	2009	Product builder	The rule debugger is a support tool for the existing test model functionality in Product builder. The purpose of the tool is to improve productivity when building new product models and reviewing existing models. The rule debugger supports validation of rules, which allows you to efficiently debug the errors in product models and to speed up development of new product models.
Manage the test process and non-conforming products and items	2009	Quality Management Solution	Use quality management to manage the test process and non-conforming products and items, such as damaged or defective goods, and to track and resolve customer or vendor problems, such as product complaints or performance issues.
Quality management system	2009	Quality Management Solution	The quality management system allows you to define quality standards and testing procedures for your organization. You can track adherence to the standards that you define and manage defective items, performance of vendors, and complaints from customers.
Quality testing requirements set up and management	2009	Quality Management Solution	Set up and manage the quality testing requirements: Specification of the test instruments used to perform the tests; Identification of test locations; Definition of the test specifications such as sampling, test groups, and test outcomes that determine whether test items meet quality standards; Perform destructive tests; Creation of the quality order (manually or automatically)
Add electronic signatures to manufacturing processes	2009	Production	Electronic signature is now available for the following manufacturing processes: 1) Production orders: Release, Report as finished, Approval 2) Bill of materials: Version approval, Version activate 3) Route: Approval, Version approval, Version activate.
Purchase requisitions	2009	Production	Create purchase requisitions to register purchase requirements, after requisitions are approved, purchase orders are created (and may be submitted to vendors) automatically.
Available-to-promise	2009	Production	The available-to-promise (ATP) functionality provides an alternative to the current delivery date control functionality for sales orders. The ATP calculation includes not only lead times and available dates, but also planned receipts and issues.
Filter production data by site	2009	Production	You can filter production orders and planned production orders by site.
Set up production parameters per site	2009	Production	You can specify production parameters on a site basis.
Improved job scheduling options with the Gantt chart	2009	Production	Planned scheduling changes are not committed until you submit the changes, which allows you to set up and test various schedules. You can change data in the Gantt chart, evaluate whether the changes should be implemented, and then choose either to save the changes to the database or to discard them.
To support the scheduling work, a number of user interface improvements have been implemented, such as the capability to view jobs. The Resource view shows jobs based on work centers, and the Order view shows jobs based on orders.
The general Gantt user interface has been improved with features that include an improved display of time scale, colors, and histograms
Integrate costing methods into projects (Project - Production integration)	2009	Project Management	With the integration of Project and Production, you can integrate both the standard and indirect costing methods into the production projects. In addition, you can now display a production order that is linked to a project. When the actual cost of the product or service is posted in Production, the production cost will be added only to the WIP value to cost prices, whereas the accrue revenue and WIP value are accrued in Project to both the cost price and the sales price.
Balance sheet posting of fixed-price and investment projects	2009	Project Management	You can post costs directly to the balance account on journals instead of only posting the costs to the Profit and loss account
Export data to Microsoft Excel	2009	Project Management	You can now export calculated data from the Statistics form to Excel and then calculate the statements from all possible views. This can be done with both actual and budgeted amounts.
Project purchase requisition	2009	Project Management	You can create a purchase requisition for a project, which allows you to charge the cost of a purchase to the project.
Project server integration with Microsoft Office Project 12	2009	Project Management	With the integration of Microsoft Office Project 12 with Microsoft Dynamics AX Project, you can now create and manage a project that is synchronized between the two systems, based on a shared resource pool. You also can integrate project work for billing and revenue recognition in Microsoft Dynamics AX. Note: This functionality is optional for Project I. To access this functionality, you must be running Microsoft Office Project Server 2007.
Calculate employee and hour utilization	2009	Project Management	You can measure the efficiency and billable rate on hours for employees and projects.
Export to Excel with Project control	2009	Project Management	You can export the data in the forms under Project control into Excel.
User-defined stages for projects	2009	Project Management	You can use project stages as a guide to the project life cycle. As project stages are defined, you can activate tasks and assign them to specific project stages. You also can create additional stages and assign customized labels throughout the project.
Track and control project costs	2009	Project Management	You can track project costs and efficiency while the project is still in process, which can help you to estimate the total expected cost of the project.
Price group support	2009	Project Management	You can create price groups as part of trade agreements to assign to projects, invoice projects, and customers. A trade agreement can apply to a specific project or customer, to multiple projects or customers, or to an invoice project or multiple invoice projects (for Time and Material and Fixed Price). By assigning price groups to projects, invoice projects, or customers, the valid sales prices are available automatically when journal transactions are created for hours, expenses, fees, and subscriptions.

Create and maintain service orders via Web portals	2009	Project Management	Two service portals are provided. The customer portal allows service customers to create service orders and track the status of their service orders via the Internet. Field technicians can use the technician portal to create or modify service orders, service order lines, repair lines, and to view service agreements, service objects, and service tasks. Service orders entered on the service portals are displayed in Microsoft Dynamics AX, and the service dispatcher can acknowledge and verify incoming service orders, transfer them to the Service orders form, and assign them to technicians.
Value inventory by standard costs	2009	Project Management	When you assign costs, the change immediately will affect your inventory value. You can value your inventory and work in process (WIP) according to the standard cost price, thus making manual adjustments unnecessary to comply with GAAP. This also applies to tracking variance on production, purchase price, and invoice price.
Monitor cash flow	2009	Project Management	You can calculate the cash flow of any project at any time. You also can print reports to see an overview of a single project or of multiple projects. The cash flow then can be transferred to General ledger cash flow.
Integration between Sales and Service	2009	Project Management	Service agreements and service orders can be created directly from a sales order. Items that are applied as spare parts in service orders or service agreements now can be identified by unique serial numbers. You can see what replacements were made within a specific period for a specific item and how the replacements were handled. You can reserve items in inventory to be applied as spare parts.
New dispatch board to control service order activities	2009	Project Management	You can use the dispatch board, which is a graphical overview that lists service order activities, to understand the flow of services, and use your mouse to control the flow of service orders and service order activities. You can prioritize service orders by urgency, use various types of service activities, and associate each service order with a preferred technician and a preferred date and time. You can complete the following tasks from the dispatch board: Display service orders within a date interval; Identify the priority of a service order or distinguish between activity types by using different color schemes; View dispatch teams with associated employees; Reassign activities using drag-and-drop and update service orders accordingly; Reset and undo changes; View service orders that have not been dispatched.
Service level agreement	2009	Project Management	Service companies can apply a time limit for when a service request must be completed, the time spent on completing service orders can be recorded, and compliance with the time frame set in the service level agreement can be monitored. You can enter reasons for exceeding the time limit of a service level agreement and print reports that provide information about assignments of service level agreements and about recorded starting and ending times of service orders.
Enhanced XML documents to support multisite and new fallback warehouse	2009	Warehouse Management	To handle cases where site and warehouse is mandatory information, all XML documents are evaluated to verify if site and warehouse information is included when reading data. In cases where warehouse is not included, the fallback warehouse is used. The fallback warehouse is defined as part of the company information.
Production cost variances	2009	Warehouse management	You can calculate and enter distinct production variances for lot size, price, quantity, and substitution variances per cost group.
Keep inventory dimensions consistent within lots	2009	Warehouse Management	The inventory dimension framework is enhanced so that item dimensions (size, color, configuration) and the storage dimension, site, are kept the same for a source transaction and any inventory transactions that are generated with the same lot ID
Multisite and intercompany orders	2009	Intercompany	The total and the multiline discounts are calculated automatically when you create an intercompany purchase order from an original sales order. Previously, the purchase price, discounts, and automatic miscellaneous charges were calculated automatically, but you had to calculate the total and the multiline discounts manually for each order line when a purchase order was created from a sales order. The total and the multiline discounts are also calculated automatically for the intercompany purchase order when you create the order from an intercompany sales order and the Price & discount search check box is selected for the Purchase Requisition action in the Intercompany action policy form.
A financial dimension is linked to inventory-related transactions	2009	Supply Chain Management	You can configure a link between a financial dimension and the site inventory dimension. This allows you to trace profit and loss figures directly to an operational site, and still conduct your official financial reporting at the company level.
Accounts receivable invoice hold	2009	Supply Chain Management	You can place an Accounts receivable transaction on hold and prevent it from being posted until a future date that you specify in the Release date field. Placing a transaction on hold makes the unposted transaction available for review and analysis.
Add miscellaneous charges to a purchase order invoice	2009	Supply Chain Management	One can now add or change miscellaneous charges during the process of invoicing a purchase order.
Advanced on-hand form	2009	Supply Chain Management	You can use the Advanced on-hand form for sales activities, such as promising orders. The form provides an overview of item availability and the various sourcing options that can be used to fulfill a customer requirement.
Changes to the Purchase order and Posting forms	2009	Supply Chain Management	A number of usability enhancements have been made to the Purchase order form and the Posting form to increase user productivity.
Changes to the Sales order and Posting forms	2009	Supply Chain Management	A number of usability enhancements have been made to the Sales order form and the Posting form to increase employee productivity.
Post invoices based on packing slips	2009	Supply Chain Management	You can post sales or purchase order invoices, based on packing slips or on a selection of packing slips and shipping dates. It is also possible to summarize sales order invoices based on a packing slip number.
Different costs and prices on different sites	2009	Supply Chain Management	You can use different planned costs and prices for items and different cost category rates (rate and indirect costs) or ratios across the various sites within the company.
Improved standard cost	2009	Supply Chain Management	You can activate and use multisite functionality with the standard cost inventory model.
Request for quotes	2009	Supply Chain Management	One can send a request for a quote to a vendor to request information about prices and delivery times for multiple items.
Separate layout for free text invoices	2009	Supply Chain Management	The process that generates free text invoice documents is now separate from the sales order invoice document process. Sales order invoices and free text invoices can be customized independently of each other, which allow users to specify content, notes, and print management setup for free text invoices.
Shipping carrier integration	2009	Supply Chain Management	Shipping software integration to provide information, such as freight charges and tracking numbers; the information is then automatically transferred into sales orders and invoices, saving manual information entry efforts and decreasing errors.
Specify item settings per site	2009	Supply Chain Management	You can define item master settings that are used when orders are created and generated at the site level.
Accounts payable invoice matching	2009	Supply Chain Management	Quickly match vendor invoice information to the related purchase orders and packing slips. Specify price tolerances for the system to automatically check prices and quantities on the invoice to be sure that they match what was expected, based on the purchase order and the packing slip.
Credit cards preapprovals and approvals	2009	Supply Chain Management	Preauthorize credit card payments for sales orders: verify the credit card information and reduce the customer's available credit for the card used; when the order is fulfilled, the credit card is billed for the amount of the transaction.

Improved inventory closing	2009	Supply Chain Management	The labels on the buttons in the Closing and adjustment form have been changed, so the steps in the closing process are easier to understand. The new design of the batch framework helps to secure the running of an inventory closing in a batch, and the helpers for the closing will now be started automatically.
Improved weighted average performance	2009	Supply Chain Management	If you are costing your inventory based on the weighted average inventory models, the inventory closing process has been improved to introduce better accuracy and faster run time on high-volume items.
Product and category catalogs for purchase requisitioning	2009	Supply Chain Management	It is now possible to create dedicated product catalogs for purchase requisitioning where companies define which items must be available when creating purchase requisitions. It is also possible to create categories for non-catalog items and make them available for use in purchase requisitions.
Request for quote supports multisite usage	2009	Supply Chain Management	The new request for quote feature has been updated to reflect the new inventory dimension site and to ensure that default financial dimension can be implemented for specific sites.
Save a vendor invoice for a purchase order	2009	Supply Chain Management	User can now save a vendor invoice for a purchase order in the Posting invoice form and post it later (no need to repeat invoice preparation). User also can match packing slips that are connected to a purchase order with the invoice.
Use bill of material (BOM) levels to control production at multiple sites	2009	Supply Chain Management	For multiple sites that share item numbers, you can set up the BOM and the route so that components can be produced at different sites.
Specify mandatory inventory dimensions	2009	Supply Chain Management	You can configure certain inventory storage dimensions to be mandatory for a dimension group. When you create a journal or a transaction, you must specify the dimension.
Changes in the Create purchase order and Create direct delivery forms	2009	Supply Chain Management	The Create direct delivery and Create purchase order forms have been modified, so now you can select a preferred vendor per site, warehouse, size, color, and configuration. Furthermore, the forms have been changed to support multisite usage and a new Price/Discount tab has been added to view price and discount information.
Create and print sales order posting documents per site	2009	Supply Chain Management	You can create posting documents for sales orders as site-specific documents or as documents that represent the company as a whole. You can create individual picking lists, packing slips, and invoices per site for the sales order lines that will be delivered from the individual sites. The picking list and the packing slip can be created only for a specific site because they list items that are physically located at the site, whereas invoices can be either site specific or they can cover deliveries from more than one site. Quotations and confirmations are company-specific documents that you create for the company as a whole, so customers receive only one quotation or confirmation document. Quotations and confirmations cannot be site specific. After you have created the site-specific documents, they can be directed to a local printer using the extended print management feature.
Profit and loss accounts for item transfers	2009	Supply Chain Management	When you transfer items, general ledger posting to specified transfer profit and transfer loss accounts occurs in either of the following situations: 1) When issue and receipt sites differ 2) When issue and receipt item dimensions differ.
Improved transparency of the return process	2009	Supply Chain Management	The transparency of the return process is improved for employees who handle incoming goods, as well as for employees who handle the crediting of the returned items. From the new Item arrival form, which you will use to track incoming goods, you can register and update customer returns, along with other receipts in the warehouse. The employee who is responsible for receiving goods in the warehouse can easily retrieve RMA numbers and identify expected returns. You control the process of returning items, and easily update returned items, based on the packing slip. Then you can create replacement orders. You also can create quarantine orders as they are needed for returned items that need inspection and for the disposal process, and then create a replacement order.
Plan for the arrival of expected items	2009	Supply Chain Management	A new form is available that you can use to estimate and plan the resource capacity that is necessary to efficiently handle incoming goods. Registering the arrival of new items also is easier because much of the required information, such as location and warehouse, is based on the previous setup and is available automatically during the arrival registration process.
Refill and pallet transport improvements	2009	Supply Chain Management	The processes of refilling pallets and transporting pallets of items have been enhanced so that you can move less than a full pallet from the bulk location to the picking location. This means that it is easier to ensure that the picking location is always adequately stocked and ready to fulfill customer requests, which is especially useful when the picking location has less capacity than the bulk location.
Easier shipment handling	2009	Supply Chain Management	The following changes have been made to make handling shipments easier: 1) You can create a batch for reservations to include all consolidated shipments that have the appropriate status. 2) You can post sales orders and transfer orders that are ready for physical update in a batch, based on shipment information, and you can monitor the status of the shipment. 3) You can ship transfer orders that are ready to be updated in batches.
Outbound process changes	2009	Supply Chain Management	The number of enhancements have been made to the outbound process from picking to loading of shipments: 1) Configure outbound rules - Configurable outbound rules make it easier to automatically send and print relevant shipment documents. 2) Pick an item - After picking an item, the warehouse worker can specify where items that have been picked should be delivered for the next step in the outbound process or to internal production. 3) Deliver an item - When items have been delivered to the outbound dock, the warehouse worker can evaluate whether repacking or consolidating shipments is required. Features that pertain to loading and unloading shipments allow the warehouse worker to control the last step in the outbound process. 4) Create shipments -The template to use for shipments that are created automatically is now controlled by explicitly defining priorities for templates. You can add output orders to a shipment up until and including the stage when the shipment has been packed. However, you can set up and define how late in the process that automatic additions should be allowed. 5) Reserve shipments - The reservation process has been improved to give the shipping manager control of which warehouse to reserve items at, as well as which of the six reservation methods to use. If all items have not been reserved, you can rerun the shipment reservation to include partial reservations and to add items to an ongoing shipping process. Picking can be started of the items that are on-hand, even if the complete shipment has not been reserved. If multisite is activated, reservations can be only from warehouses within the same site. 6) Pick items across modules - Three different methods of picking have been merged into one picking method, so that orders are handled in the same way for sales order picking, transfer order picking, and warehouse management picking. A new picking registration form has also been created 7) Picking process - The process of updating all items as picked when they are from the same location has been improved by allowing multiple lines to be selected and picked in one operation. 8) Picking location refill has been improved by automatically activating a refill pallet transport in cases where a shipment reservation results in items missing in the picking location. Output pallet transports are no longer controlled by the inbound pallet quantity set up for an item, but can be defined separately.
Enterprise Portal User interface enhancements	2009	Enterprise Portal Framework	More interaction, consistency, user can perform actions on selected items in lists, including list previews, and lists can now be sorted, filtered, and grouped. List views can be changed. Users with access to multiple companies can change companies in Enterprise Portal by selecting a different company from a menu. If organization deploys Role Centers in Enterprise Portal, users can view graphs, charts, list, and reports. If organization uses Microsoft Office SharePoint Server, users can also view key performance indicators and activity cues.
Enterprise Portal administration enhancements	2009	Enterprise Portal Framework	Enterprise Portal site creation and deployment is now a one-click process.: it is now installed using the Setup wizard; AXSetup.exe utility automates the process of configuring the proxy in various locations on the Enterprise Portal server, creates an Enterprise Portal site, extends that site in SharePoint services, and deploys the site.

Enterprise Portal now supports multisite usage	2009	Enterprise Portal Framework	Enterprise Portal functionality used by sales representatives, customers, and vendors has been changed to support the new multisite feature.
Set upper diem rules	2009	Expense Management	The implementation of per diem rules gives you more flexibility and makes it possible to create per diem rules around multiple sets of criteria, such as different countries
Personal expense options	2009	Expense Management	Company can select to pay the personal expenses and then debit the employees account for the transaction amount, or can choose to not pay the personal expenses, but create a report that shows that personal expenses were charged on the expense report.
Define and apply policy violations	2009	Expense Management	Define the minimum and maximum values to be entered against expense types and system would automatically flag any user who abuses these policies. With this feature in place, a user will not be allowed to submit an expense report that violates the policies set for expenses.
Import credit cards	2009	Expense Management	Employees may import credit card and travel account transactions to their expense reports.
Enter expenses in Enterprise Portal	2009	Expense Management	Employee can flexibly enter work expenses in Enterprise Portal. Expense reports can also be submitted, approved, or rejected. Approved reports can be transferred back to the general ledger in the Microsoft Dynamics AX client.
Use the Hotel wizard to itemize expense reports	2009	Expense Management	You can now itemize your hotel bills into line items when creating an expense report. The cost of the hotel stay can be separated, as well as other costs incurred such as broadband internet use and room service.
Expense management workflow	2009	Expense Management	You can define the approval workflow process for your organization, based on predefined rules. Notifications and workflow actions can be added to the process to ensure that all the correct steps are taken in the expense report submittal and approval process.
Category integration with Project and Production	2009	Expense Management	Overlapping tables have been combined to make the integration of expense types and categories more manageable.
Split expenses at the transaction level	2009	Expense Management	One can split expenses at the transaction level across projects, accounts, and dimensions and can see the transactions in the Expense report form.
View expense reports from General ledger	2009	Expense Management	As you view voucher transactions in General ledger, the inquiry is at a very high level. However, now you can open the original expense report from within General ledger to see detailed information about the voucher without having to search for the correct expense report.