



What's new in Microsoft Dynamics AX 2012

New Functionality Name	AX Version In Which This Feature Was Introduced	AX Module Name	New Functionality Description
Case Management in the Rich Client	2012	Sales and Marketing	Companies frequently experience customers who contact the company to resolve a problem, to have their questions answered, replace bought items, and so on. The Case management functionality registers such cases enabling for the registration, assignment, planning, resolution, follow up and analysis of cases.
Knowledge Articles	2012	Sales and Marketing	Much knowledge is accumulated over time in the organization, and this knowledge should be available to Customer Service Representatives while they perform their job. Easing the path of solving a specific case requires quick access to documents, links, and other information that are grouped logically. Knowledge articles let users quickly benefit from the accumulated organizational knowledge of the company while they are handling cases and employing teams of people to resolve cases.
Action Pane Strip	2012	Core	The new Action Pane strip control provides an action presentation that resembles the Microsoft Windows 7 Windows Explorer bar. The Action Pane strip control can be used at the top of forms that do not have sufficient actions to justify the use of a full action pane. They are also used within the form to position actions close to their related records and data fields.
Document View	2012	Core	The concept of a document view is introduced into client forms to provide developers and users the ability to have a read-only representation of data that reduces the risk of accidental changes.
Jewel Menu	2012	Core	The Jewel menu replaces the Microsoft Dynamics AX menu which was available in earlier versions of the workspace. It also provides drop-down menus which in earlier versions were at the top of each form.
Navigation Pane	2012	Core	The Navigation Pane is redesigned to provide navigation options that are more visually appealing and usable. In earlier versions there were three panes which displayed Favorites, Places, and Forms, and now they are condensed into a single pane that flows and scrolls as one unit. This makes it easier to control and customize.
Preview Panes	2012	Core	The Preview pane component displays more information about the selected record in a List Page.
Fast Tabs	2012	Core	A Fast Tab is a new vertical presentation style for the existing tab control. Fast Tabs are used in the Windows 7 and Microsoft Office when lots of data must be displayed in a highly accessible way. Fast Tabs display tab pages in a vertical sliding way to activate the options in the following list: <ul style="list-style-type: none"> More than one tab page can be displayed at a time. Longer, more explanatory tab page names are provided to the user. The display of summary fields that give the user information from the tab page without having to be expanded.
Grid Check Boxes	2012	Core	In earlier versions, the gray box-shaped row labels were displayed on the left side of each grid row. Now they are replaced with grid check boxes that resemble those found in Windows Explorer in Windows 7. Grid check boxes are a visible indication to users, that they can select multiple records and even select all records, if it is necessary.
Enhanced Previews	2012	Core	Improved previews are displayed to the user when they rest the mouse pointer over any foreign key field or over any control on which the developer has set the properties.
Segmented Entry Control	2012	Core	Segmented entry control simplifies the task of entering complex account and dimension combinations. The following list describes how account and dimension data entry is improved. <ul style="list-style-type: none"> A simple cheat sheet window shows the user-defined title for each segment. Recent values entered by the user for the current segment are displayed. A lookup window lets the user select from a list of valid values or all values for the current segment. Instance specific options for a control include the ability to turn off the recent entries window. The ability to show only abbreviated values (six characters) for nonfocused segments. To provide improved readability, both the cheat sheet and lookup windows open up aligned to the currently focused segment.
Organization Model	2012	Core	Microsoft Dynamics AX 2012 introduces new organizational modeling capabilities. This helps make your organization structure easier to manage by providing the following benefits. <ul style="list-style-type: none"> More organization types Security more independent of the organization structure Addition of organization hierarchy Data sharing between organizations
Organizational Hierarchies	2012	Core	You can set up organizational hierarchies to view and report on different perspectives of your business. Organizations in a hierarchy can share parameters, policies, and transactions. An organization can inherit or override the parameters of its parent organization.
Help System	2012	Core	A new Help system is used to supply Help documentation for the application and development workspaces. You can add new help content by adding correctly formatted HTML files to the help server. No compilation, rebuilding, or AOT deployments are necessary to add Help documentation.
Post-Dated Checks	2012	Core	The PDC functionality is available on both the Accounts receivable and Accounts payable modules and fully integrates with dimensions, check printing, centralized payments, settlements, and the standard banking functionality available in Microsoft Dynamics AX 2012. The following list is a high level overview of the features that are included with the PDC functionality: <ul style="list-style-type: none"> Independently activate or deactivate PDCs in Accounts receivable and Accounts payable. Independent clearing accounts for issued and received post-dated checks. Separate clearing accounts for withholding taxes. Settlement of the PDC against one or more transactions. This includes cross company transactions when centralized payments are used. Canceling a PDC. Identifying PDCs maturing on or before a specified date. Support for creating PDCs with installment schedules.

Compliance and Internal controls	2012	Core	One challenge that customers face today is identifying which controls to use to make sure that their business complies with laws, business rules, policies and regulations. The Default controls library, introduced in Microsoft Dynamics® AX 2012, contains many of the most frequently used controls. This library provides a resource for customers who are searching for various types of controls that will help meet their needs.
Invoice Matching Task for Workflow	2012	Core	Invoice matching is now available as a workflow task that can be performed without user interaction. The workflow can be started, based on a Microsoft Dynamics AX business event, such as when new records are created by using the vendor invoice service. Vendor portal scenarios and import scenarios in which vendor invoices are processed without requiring user intervention are supported.
Workflow for Free Text Invoices	2012	Core	The standard Microsoft Dynamics AX 2012 workflow framework is extended to work for free text invoices. This framework enables users to decide whether a review process should be required on free text invoices.
Microsoft Office Add-Ins	2012	Core	Office add-ins lets a user export and import data. The four main uses for the Microsoft Add-ins are as follows: <ul style="list-style-type: none"> ○ Lightweight reporting: From any grid in the client or Enterprise Portal, export data, extend and build upon it in Excel, then update as conditions change. ○ Editing data in Excel: Update Microsoft Dynamics AX 2012 data by using the Excel add-ins. ○ Import data by using Excel: Excel can be used as a template to collect reference and master data to be imported into Microsoft Dynamics AX 2012. ○ Templates and documents: Incorporate Microsoft Dynamics AX 2012 data in Word or Excel documents (for example: collection letter, quotation, sales forecast, project forecast, aging report, and so on.)
Document Handling	2012	Core	Document handling is improved in Microsoft Dynamics AX 2012 to include support for URLs and a document file web service. The improvements can ease the document handling process for companies that are geographically dispersed and that want to maintain their paper-based documents in one location.
Send an Email Message	2012	Core	From the Collections form, you can send an email message through Office Outlook. You can also automatically attach information about selected transactions or customer statements as a Microsoft Office Excel attachment.
Shared Worker Information	2012	Core	In Microsoft Dynamics® AX 2009, it was necessary for users to log in and out of companies to maintain employees, applicants, and other employee related data. To streamline the user experience for these processes, the data in Microsoft Dynamics AX 2012 is shared across all legal entities in an installation. Approximately 175 tables are shared in the HRM module in Microsoft Dynamics AX 2012. The Employee form is replaced with the new Worker form in Microsoft Dynamics AX 2012. A worker can be an employee or contractor. Improvements are made to help improve the processes around tasks that are related to employees and contractors.
Status Bar	2012	Core	The status bar can be personalized by the user
Vendor Invoice Processing Workflow	2012	Core	Two new workflow types, Vendor invoice and Vendor invoice line, let users create user-defined workflows for vendor invoices. The workflow type contains the following elements: <ul style="list-style-type: none"> ○ Approval elements for creating approval tasks. ○ A task element for use in completing and correcting vendor invoices. ○ Automated tasks that can be run programmatically without requiring user intervention, to perform selected validations, and to post the vendor invoices.
Work Items	2012	Core	The concept of work item queues is introduced in Microsoft Dynamics AX 2012 to provide an alternative assignment and management model for task elements in workflows. Workflow tasks can now be managed by a team by using a shared work list.
Workflow for Travel and Expense Management	2012	Core	Microsoft Dynamics AX 2012 provides an option to automate the process of posting by making posting a part of the expense work flow itself. In addition, Microsoft Dynamics AX 2012 enables queuing for two of the expense workflow types (templates): <ol style="list-style-type: none"> 1. Expense Reports 2. VAT Recovery
Workflows for Budget Register Entries	2012	Core	When you create budget register entries, you can set up workflows so that a budget manager can approve the budget register entry. If you use workflow, when transfer rules are violated, the budget register entry can be assigned to a specific person for approval.
Accounting Distributions	2012	General ledger	When you define how to account for an amount on a source document line, the accounting distribution may be split based on percentage, quantity, or amount.
Prepaid Purchase Orders	2012	General ledger	A new feature is introduced in Microsoft Dynamics AX 2012 that helps automate a process for making a prepayment for a purchase order. This feature allows for the prepayment to be settled against the purchase order to help prevent over or double payment.
Customer Pools	2012	General ledger	You can set up customer pools to represent groups of customers. You can use customer pools as filters for the customer information about collections in list pages, in the Collections form, or when you create aging snapshots.
Creating and Assigning Collection Agents	2012	General ledger	A collections agent is a person who works with customers to make sure that payments are collected in a timely manner. In Microsoft Dynamics AX, collections agents are employees and contractors that have a user relationship with a Microsoft Dynamics AX user. You can assign a customer pool to a collection agent.
Aging Period Definitions and Snapshots	2012	General ledger	You can use the Aging period definitions form to analyze the maturity of customer accounts and vendor accounts, based on a date that you enter. An aging snapshot form contains the calculated aged balances for a group of customers at one point in time.
Cases and Activities	2012	General ledger	Use cases to organize collections activities and transactions. For example, if you have to collect for three transactions, you can add them to a case, and then manage activities that are related to your collections work on those three transactions together.
Perform Write-Offs	2012	General ledger	You can write off bad debts by clicking Write off in the Collections form, and on the Collections, All customers, and Open customer invoices list pages.
Customer Invoice Correction Process	2012	General ledger	New Correct Invoice button is added to the Free text invoice details form and the Free text invoice list page. A new form will open where the user can adjust the necessary information and then post the correction.
Recurring Free Text Invoice Process	2012	General ledger	In Microsoft Dynamics AX 2012, a new feature is introduced to let you set up a customer to be billed on a recurring basis.
Free Text Invoice Quantities and Unit Prices	2012	General ledger	Frequently, a free text invoice line can be used to sell a quantity of a kind of goods, services, or rights. Providing this information to the user and a basic amount calculation in Microsoft Dynamics AX 2012 will help better identify and explain charges to customers.
Currencies and Exchange Rates Setup	2012	General ledger	In Microsoft Dynamics AX 2012, currencies and exchange rates can be shared across all legal entities. This means that you can set up or maintain currencies that are available for use in all legal entities that make up the organization.
Asynchronous Processing	2012	General ledger	Asynchronous processing is useful when you are processing a large volume of source documents. It enables the processing to be scheduled and the user to return to data entry more quickly.
Multiple Charts of Accounts	2012	General ledger	It is common for large organizations to have the same chart of accounts that is used across multiple legal entities. This feature is included in Microsoft Dynamics AX 2012 and lets you define legal entity specific data, such as the default sales tax code on the main account or the ability to inactivate a financial dimension value for a specific legal entity.
Commitment Accounting	2012	General ledger	Commitment accounting enables the recording of a commitment in the general ledger for future or planned expenses before the creation or collection of the underlying documents, such as, invoices or purchase orders, before those committed funds are paid out.

Invoice Matching Improvements	2012	General ledger	<p>In Microsoft Dynamics AX 2012, the Invoice Matching framework is extended to support several new matching scenarios. The new types of invoice matching include the following:</p> <ul style="list-style-type: none"> ○ Extended price matching ○ Invoice total matching ○ Line matching <ul style="list-style-type: none"> - Two-way matching - Three-way matching ○ Miscellaneous charge matching
Shared Fiscal Calendars	2012	General ledger	<p>In Microsoft Dynamics AX 2012, fiscal calendars are now shared across multiple legal entities. The benefits of sharing fiscal calendars include the following:</p> <ul style="list-style-type: none"> ○ Supporting multiple fiscal calendars for each legal entity. For example, for fixed assets that you may require two calendars one for auditing and one for tax. This lets you run parallel depreciations. ○ Sharing fiscal calendars across multiple legal entities. This reduces how much setup is required for each legal entity.
View and Manage Collections Information	2012	General ledger	<p>Use the Contacts Fact Box to view collections contact information for the customer. Use the Aged balances Fact Box to view aged balances for the customer, based on the selected aging period definition. Use the Credit information Fact Box to view the credit limit and current balance information for the customer. The Change status button lets users update the status of each transaction to track the state of the transaction.</p>
Subledger Accounting	2012	General ledger	<p>Improvements are made for previewing and updating the accounting entries in the subledger before journalizing a source document in Microsoft Dynamics AX 2012. The subledger journal entries provide the preview of the accounting entry, and the accounting distributions can be used to correct the subledger journal entry to make sure that the correct ledger accounts are being updated. Options are also now available for how the subledger journal entries will be transferred to general ledger: synchronously or asynchronously, also whether in detail or summary.</p>
Financial Dimensions Default Templates	2012	General ledger	<p>Use this form to create a template of percentage and financial dimension value combinations. The information in the template will be used to display default financial dimension values when you distribute source document amounts.</p>
Financial Dimensions	2012	General ledger	<p>The following are the main features and changes that are made to financial dimensions in Microsoft Dynamics AX 2012:</p> <ul style="list-style-type: none"> ○ The Financial dimension wizard is removed. The user can create and rename financial dimension in a form, exactly like other base data entities. It is no longer required to synchronize the database when adding a new financial dimension. ○ Valid from and to dates on each financial dimension value. ○ The users can mask the financial dimension. The mask is used to validate the financial dimension value.
Advanced Rule Structures for Ledger Posting	2012	General ledger	<p>You can use advanced rule structures to link a financial dimension or multiple financial dimensions to an account number or range of account numbers so that additional information can be collected for reporting and analysis.</p>
Ledger Account Alias	2012	General ledger	<p>You can set up ledger account number aliases to provide a shortcut to a complete account number or a partial account number. You can also define a date range on an account that will be used to determine whether an account is valid for entry and posting and define an account mask to dictate the format of account values (length, symbols, alpha-numeric values, and so on).</p>
Accounts Receivable Features	2012	General ledger	<p>The Accounts receivable module is updated in several key areas to help improve efficiency.</p> <ul style="list-style-type: none"> ○ Free text invoice improvements <ul style="list-style-type: none"> - Addition of billing codes to define a specific line item charge, including definable rate calculations and fields - Addition of billing classifications to organize free text invoice receivables ○ Ability to process documents by billing classifications ○ Ability to support settlements in a pooled cash setup ○ Addition of customer reporting attributes for United States (U.S.) governmental reporting requirements
Define Budget Funds Available Calculation	2012	General ledger	<p>The Budget funds available tab on the Budget control configuration form is used to define the budget funds available calculation.</p>
Define Budget Checking Rules	2012	General ledger	<p>The Source documents tab on the Budget control configuration form is used to define which business documents should validate against the budget control configuration.</p>
Define Budget Cycles	2012	General ledger	<p>Budget cycle time spans define the length of a budget cycle. Budget cycles are associated with the periods in a fiscal calendar and can be shared across legal entities. Budget cycles determine the starting and ending periods for budget control.</p>
Budget Amounts	2012	General ledger	<p>The budget data is entered through the Budget register entry form which consists of a header and lines. The header information is applied to the whole budget register entry and the lines (account entries) are where budget amounts for specific dimension combinations are entered.</p>
Budget Reporting	2012	General ledger	<p>The following new budget reports are included in the Budgeting module in Microsoft Dynamics AX 2012 for a better and transparent reporting:</p> <ul style="list-style-type: none"> ○ Actual versus budget report ○ Budget funds available report ○ Budget detail report
Budgeting Features	2012	General ledger	<p>The Microsoft Dynamics AX 2012 Budgeting module improvements are designed to incorporate public sector budgeting requirements. The public sector industry solution is improved in several key areas to help organizations achieve better budgetary control.</p> <ul style="list-style-type: none"> ○ Apportionment budget types ○ Provisional budgets ○ Budget carry-forward at year end
General Ledger Features	2012	General ledger	<p>The General ledger module is updated in several key areas to help public sector organizations improve efficiency and process flows.</p> <ul style="list-style-type: none"> ○ General ledger year-end processing improvements. With the General ledger year-end process, you can select accounts by fund for year-end closing and close the selected accounts to different equity accounts. ○ Ability to transfer purchase order encumbrances across fiscal years ○ Introduction of a fund entity that defines multiple sets of books within the same Legal Entity. It is also typically used as an account dimension, and offers the ability to require that journal entries balance by fund. ○ Ability to correct, adjust, and reclassify transactions by using advanced ledger entries ○ Additional attributes can be added to financial transactions to help perform more detailed analysis. Derived financial hierarchies let you create financial categories that are separate from financial dimensions, but linked to them. This lets you derive the financial categories from the financial dimensions for analytics.

Procurement and Accounts Payable Features	2012	General ledger	<p>The Procurement and sourcing and Accounts payable modules are updated in several key areas to help public sector organizations improve efficiency process flows.</p> <ul style="list-style-type: none"> o Ability to allocate percentages of vendor invoices to specific bank accounts o Addition of DUNS and +4 DUNS fields to the Vendor bank accounts form o Addition of U.S. 1099-S and 1099-G tax statements o Ability to track unplanned purchases. In an emergency or special circumstance, you might create an order that circumvents the typical purchasing process. o Purchase agreement improvements <ul style="list-style-type: none"> - Based on purchase agreement classification, selected new data groups and sub-tables may be enabled on the purchase agreement. This includes Subcontractors, Certifications, and Activities - Ability to process an invoice directly against a purchase agreement without first requiring creation of a release purchase order. <p>Budgets are frequently created outside Microsoft Dynamics AX by using various budget formulation tools and software. If you are using Microsoft Dynamics AX 2012 budget control functionality, you may have to bring this information into Microsoft Dynamics AX. In addition, you may want to create, update, delete, and read existing budget register entries from a third-party product. This feature provides a web service for budget register entries to communicate with the third-party applications and enables organizations to Create, Read, Update, and Delete budget register entries.</p> <p>The process of defining dimensions for budgets enables an organization to determine which dimensions within the account structures associated with the chart of accounts are available for budgeting.</p> <p>Budget control configuration is now available in AX 2012.</p> <p>When budget control is configured, source documents and accounting journals can be checked for budget funds availability. By configuring budget control, an organization can decide which source documents and accounting journals the budget check should be applied.</p> <p>Several new features are added to existing role centers as a part of the public sector industry solution. In addition, one new role center, for Finance Director, is introduced in Microsoft Dynamics AX 2012.</p> <p>General Ledger Role Centers. Three financial accounting role centers are redesigned as a part of the public sector industry solution. This includes the Accountant, Accounting Manager, and Controller role centers.</p> <p>Finance Director Role Center. The Finance Director role center resembles the Chief Financial Officer role center available in any Microsoft Dynamics AX 2012 installation, except that the Finance Director role center has an Actuals vs. Budget web part on the default role center while the Chief Financial Officer does not. In addition, the following web parts are available for use with the Finance Director role center:</p> <ul style="list-style-type: none"> o Current equity by dimension chart o Year-to year expenditure comparison by period chart o Finance Director KPI reports (Profitability analysis, Investment analysis, Long-term solvency, Short-term solvency, Operational efficiency, Finance Director ratios) <p>Accounts Receivable Role Center. The Accounts Receivable Administrator role center is redesigned to include four new web parts.</p> <ul style="list-style-type: none"> o Customers with unposted interest notes list report o Customers with unsettled amounts by billing classifications report o Receivables by billing classification and period chart o Customers with unposted collection letters list report <p>A billing classification dimension is also available in the Public Sector Accounts Receivable cube.</p>
Budget Transaction Web Services	2012	General ledger	
Dimensions for Budgets	2012	General ledger	
Budget control configuration	2012	General ledger	
Using Budget Control	2012	General ledger	
Public Sector Role Center Overview	2012	General ledger	
Hiring Workers and Terminating Workers	2012	Human resource	<p>The mass hire process is updated in Microsoft Dynamics AX 2012 to use shared workers and positions. A common action that must be performed in any organization is the termination of an existing worker. Termination consists of capturing the necessary data to terminate the worker from the organization on the correct date. In Microsoft Dynamics AX 2012, the termination process is improved to be more streamlined, and manageable.</p> <p>Departments are introduced in Microsoft Dynamics AX 2012 to replace the organizational units from earlier versions of Microsoft Dynamics AX. Departments are one of the many entities that are a part of the new organization hierarchy uptake in Microsoft Dynamics AX 2012. Positions in Microsoft Dynamics AX 2012 now have a direct link to Departments. They are used to help create the reporting relationship hierarchy and to provide an improved flow for creating and maintaining data.</p> <p>The new Injury and illness feature in Microsoft Dynamics AX 2012 has several distinct functions or uses. One use is to provide information to employers whose workers are being injured or made ill by hazards in their workplace. The information in the data helps make employers more aware of the kinds of injuries and illnesses occurring in the workplace and the hazards that cause or contribute to them. When employers analyze and review the information in their records, they can identify and correct hazardous workplace conditions on their own.</p> <p>The Global Address Book was added to Microsoft Dynamics AX 2009. By adding Applicant to the Global Address Book, in Microsoft Dynamics AX 2012, the directory subsystem including names, address and contact information is aligned with this structure. Therefore, redundant data is removed. Also included in Microsoft Dynamics AX 2012, are several architectural changes to the Applicant entity.</p>
Department and Position Improvements	2012	Human resource	
Injury and Illness	2012	Human resource	
Application and Recruiting Improvements	2012	Human resource	<p>Changes to the Applicant process in Microsoft Dynamics AX 2012 allow for creating the Applicant directly from the Global Address Book (GAB), or from the Applicant list page or details form.</p> <p>List pages are where users can find data, analyze data, and then take action upon that data quickly. In Microsoft Dynamics AX 2012, improvements are made to the Recruitment projects list page. The primary goal of the improvements made is to enable users to surface and act upon information about a Recruitment project in a single view reducing the number of clicks or drill down's needed.</p>

			<p>Microsoft Dynamics AX 2012 introduces many improvements to trade agreements including the following:</p> <ul style="list-style-type: none"> ○ Creation and maintenance of trade agreements is moved to journals for better control, usability, and transparency. ○ Supports one view that includes all trade agreements for a selected set of items, customers, and vendors. ○ Separate roles for creating or maintaining and approval. ○ Allows for mass updates.
Trade Agreements functionality Improvements	2012	Trade Agreements	<p>Several types of trade agreements have new functionality:</p> <ul style="list-style-type: none"> ○ Quantity changes. Microsoft Dynamics AX 2012 has introduced an additional quantity field on trade agreements. The addition of this field lets you define trade agreements for a specific quantity range. ○ Generic currency. Generic currency allows for trade agreements to be set up for one currency. However, it can be used for all currencies. ○ Smart rounding. The smart rounding concept which is a type of psychological pricing, can also be thought of as a “price ending” based on the marketing theory that prices have a psychological effect on people. Smart rounding can be applied after a bulk adjustment of trade agreements, or it can be applied automatically after a unit price is calculated, based on a generic currency and an exchange rate. <p>With agreements, you can perform the following tasks:</p> <ul style="list-style-type: none"> ○ Support purchase and sales agreements which are based on quantities or amounts. ○ Define a validity period for purchase and sales agreement. The delivery date of a purchase or sales should be within the validity period or the requested ship date on a sales order should be within the period. ○ Put purchase and sales agreements on hold to control whether they are available to the agent during ordering. ○ Control whether to search for purchase or agreements when purchase order lines are created indirectly, for example, by firming planned orders. ○ Control whether to search for sales agreements when sales order lines are created indirectly, for example, by using intercompany orders ○ Create a release order directly from the new Purchase agreement details form and new Sales agreement details form when the commitment is defined for a quantity of a product.
Sales and Purchase Agreements	2012	Trade Agreements	<p>In Microsoft Dynamics AX 2012, resources can be allocated to jobs and operations by matching the capabilities of the resources with the requirements of the operation. Microsoft Dynamics AX 2012 has changed the following to the Operations Resource Model:</p> <ul style="list-style-type: none"> ○ Separated the way resources are grouped for managing capacity from the way resource requirements are specified for activities. ○ Enabled resources to be used at multiple locations, just not at the same time. ○ Eliminated the need for defining resources multiple times. ○ Added the functionality to view available capacity by capability and simplifying manual scheduling and exception handling.
Operations Resource Model	2012	Production	
Costing Based on the Production Flow	2012	Production	The periodic consolidation of the cost for a production flow corrects the related WIP account and allows for determining variances for the products supplied by the production flow.
Kanban Board	2012	Production	Lean Manufacturing is visual. Microsoft Dynamics AX 2012 brings this principle to a new level. The Kanban board uses the different approaches and features of lean manufacturing integrated into a single, configurable user interface for the shop floor.
Finite Capacity Scheduling for Lean Manufacturing	2012	Production	The main difference between production orders and production kanbans in Lean Manufacturing for Microsoft Dynamics AX 2012 is the implementation of finite capacity control for Lean Manufacturing. Whereas finite scheduling for production orders try to optimize capacity loading for single resources, with the risk of over-optimizing single resources and building increasing batch sizes, the lean capacity is based on work cell throughput assuming a concurrent use of various resources in a work cell. A lean work cell is represented by a Resource group that is flagged as the role of a lean work cell. This property makes all resources allocated to the work cell unavailable for finite scheduling of production orders or planned production orders for the time these resources are assigned to the work cell.
Cost Accounting of Subcontracted Services	2012	Production	With the posting of the receipt advice or a vendor packing slip on a purchase order created for a production flow (generated based on kanban jobs for subcontracted activities), the value of the receipt is accounted in the WIP accounts of the production flow. Deviations of invoices are also accounted to the production flow. A new cost category for subcontracted work is introduced enabling a transparent tracking of the value of subcontracted work allocated to WIP and consumed per period.
Manufacturing Execution	2012	Production	Workers can register time and item consumption on production jobs by using the Job registration form. This feature lets you do the following:
			<ul style="list-style-type: none"> ○ Start/stop production order jobs ○ Start/stop Project hour registration ○ Report started, stopped, completed, time, good and bad quantities ○ Registration approval ○ Supervisor functionality (Job prioritization, Job history/Job feedback editing)
Build a Product Configuration Model	2012	Production	The primary goal in creating a new modeling framework for the Product Configurator is removing the need for a developer license to maintain product models. Microsoft Dynamics AX 2012 Product configurator enables the user to maintain their product models without the help of an X++ skilled developer. The Product Configurator is a flexible tool that is used to set up product models in the areas that require setup.
Production Flow Improvements	2012	Production	To better support continuous improvement, the production flows are implemented in time-effective versions. This enables copying an existing production flow version that includes all related kanban rules, to a future version of the same or new production flow, and models the future-state production flow before validating and activating it for production.
Products and Material in Work in Progress	2012	Production	The production flow architecture enables the transfer of material to the production flow with withdrawal kanbans in storage or transport handling unit sizes. The value of the issued material is added to the WIP account related to the production flow similar to material issued to a production order.
Cycle Time Performance Indicator	2012	Production	The cycle time requirements can be defined in the production flow version details for each production flow version. Based on these settings, the average cycle time requirement is calculated for each activity of the production flow on validation, activation or recalculation of the version. The cycle time performance indicator displays the actual calculated cycle time for the defined cycle time period in relation to the boundaries defined in the production flow version.
Event Kanbans	2012	Production	The ultimate lean goal, the single piece flow with zero inventories, is not an illusion. Many industries can replace build to stock by assemble to order scenarios that support single piece flow. Lean Manufacturing for Microsoft AX 2012 provides a powerful new instrument to support these scenarios – Kanban production and replenishment based on Events. The Lean Manufacturing framework of Microsoft Dynamics AX 2012 enables definition of kanban rules with the replenishment strategy Event. Creating event kanbans based on this strategy is triggered by a source requirement and the new kanban is pegged to the source requirement. In AX2012 can be listed Sales, Kanban line, BOM line, Minimum Stock Events.

Kanban Board for Process Jobs	2012	Production	<p>Introducing kanban as an entity in MRP allows for the following:</p> <ul style="list-style-type: none"> ○ The simplicity of the kanban organization. The physical flow of handling units triggers the flow of related information. ○ The concreteness and simplicity of a physical kanban board representing a work cell schedule. ○ The transparency of an integrated system that enables visibility of the situation of a specific cell, without going onto the shop floor. ○ The accuracy of an electronic kanban schedule for the consumers of the supplied goods. <p>The kanban board is a new user interface for lean manufacturing that combines all requirements for the multiple roles into a single, configurable, and scalable user interface.</p>
Mixed Mode	2012	Production	<p>Microsoft Dynamics AX 2012 supports Mixed mode manufacturing. Mixed mode manufacturing enables companies to implement different production strategies on a single production site. The Mixed mode topic introduces how concurrent production strategies can be implemented to amount to the best possible result; maximum customer value.</p>
Modeling Transfer as Subcontracted Activity	2012	Production	<p>Activity based subcontracting in Lean Manufacturing for Microsoft Dynamics AX 2012 introduces the ability of integration to carriers and transport vendors that move material and products between locations of a production flow. Modeling a transfer activity enables the assignment of a carrier or vendor. Microsoft Dynamics AX 2012 supports the quantity calculation for transport services, creating related purchase orders, an integrated receipt registration, and finally the cost integration of transport services into the production flow costing.</p>
Product Configuration in Enterprise Portal	2012	Production	<p>Microsoft Dynamics AX 2012 lets you access product configuration information for an order through the Microsoft AX Client and the Enterprise portal. Product configuration capabilities are integrated into the sales order, sales quotation, purchase order and production order. This enables configuration of a product while you enter an order, or modify existing configurations.</p>
Reconciling Master Scheduling and Lean Manufacturing	2012	Production	<p>New in Microsoft Dynamics AX 2012 - Planned Kanban (Production kanban: BOM explosion creates Kanban line issues, Withdrawal kanban: Creates Kanban transfer issues). The replenishment strategy assigned to the kanban rule also determines the processes needed to create a new instance of a kanban for the rule. The replenishment strategies are:</p> <p>Fixed quantity. Fixed quantity kanbans are pre-created according to the needed kanban quantity. The handling units with the finished items are usually moved to a supermarket or picking area.</p> <p>Scheduled. The behavior of the Scheduled replenishment strategy in master scheduling resembles production orders. Kanbans are created by firming planned kanbans manually or by using a firming fence. The scheduled principle is used for items or variants produced in a lean work cell, but demand is created from forecast, customer or dependent demand, without being explicitly built to order.</p> <p>Event. For replenishment strategy Event type, kanbans are always directly created based on a specific demand.</p>
Purchase Process for Subcontracted Activities and Services	2012	Production	<p>In Microsoft Dynamics for AX 2012, the purchase process for subcontractedactivities is based on the scheduling and execution registration of the kanban jobs. The purchase process is an independent process and enables adjustment of the purchase documents manually in every step of the purchase process.</p>
Semi-Finished Products	2012	Production	<p>Lean Manufacturing for Microsoft Dynamics AX 2012 integrates kanbans for inventoried products and semi-finished products in a single framework, offering a unified user experience for all cases.</p>
Resource Scheduling Improvements	2012	Production	<p>The scheduling engine is aligned with the new resource model. This introduces capabilities and priorities, and replaces work centers and work center groups by using resources and resource groups. The scheduling engine can now automatically search for a better solution, based on resource priority, and not only order duration.</p> <p>The core functionality in the Microsoft Dynamics AX 2012 Time and attendance module lets the user do the following:</p> <ul style="list-style-type: none"> ○ Recording when workers arrive and depart. The user interface of the Job registration form is significantly changed. ○ Report on indirect activities. ○ Calculate worker time. After each day, the worker's registration is calculated. By using workflow, you can determine who can approve registrations, and whether automatic approval of registrations is allowed. If an approval workflow is used, only deviations not accepted in the workflow have to be approved manually. The approval comes in two flavors - Individual registrations and the representation of all registrations made on a single work day as calculated in the Calculate form ○ Approve worker time ○ Track worker absences
Time and Attendance	2012	Production	
Transfer Jobs	2012	Production	<p>This fast tab supports the work of a user dedicated to a specific work cell. The user can control transfer in, transfer out, and picking processes in a single User Interface (UI), filtering all transactions related to the selected work cell.</p>
Catch Weight	2012	Process Manufacturing	<p>Catch weight is updated in several key areas to improve efficiency and to improve the business process flows. The ability to view and use catch weight products is added throughout the following areas:</p> <ul style="list-style-type: none"> ○ Product Information Management (Product details, Product templates). Catch weight products originate at the enterprise level in the same manner as all other new products. When the product is released to the company, the catch weight tolerance factor, units of measure, and other variables are defined and maintained for the product. ○ Procurement and Sourcing (Purchase agreements, Delivery schedules) ○ Sales and marketing (Sales agreements, Delivery schedules) ○ Production control (Report as finished on a Production order)
Product Information Management Improvements	2012	Process Manufacturing	<p>The Product management module is updated in several key areas to improve efficiency and business process flows. Specifically, the following areas are improved:</p> <ul style="list-style-type: none"> ○ Enable catch weight to be globally defined ○ Formula products use the global product concept <p>Other Microsoft Dynamics AX 2012 features that are integrated with Process manufacturing include the following:</p> <ul style="list-style-type: none"> ○ Product and product variants ○ Released products

Inventory and Warehouse Management Improvements	2012	Process Manufacturing	<p>The Inventory and warehouse management module is updated in several key areas to improve efficiency and the business process flows. Specifically, the following areas are improved:</p> <ul style="list-style-type: none"> ○ Stocked inventory policy determined by stocked items attributes. A product definition no longer must be created for each product to be released to a company. You can now release multiple products. This includes product variants, to multiple companies. ○ Ability to group and split planned orders ○ Multiple batch attributes improvements. New User Interface (UI) makes it much easier to work with batch attributes. ○ Multiple Shelf life improvements ○ Commodity pricing now includes financial dimensions ○ Integration with the Warehouse Management System II. Process manufacturing functionality is integrated with the WMSII.
Delivery Schedules	2012	Process Manufacturing	<p>Process Manufacturing for Microsoft Dynamics AX 2012 integrates the following improvements to delivery schedules:</p> <ul style="list-style-type: none"> ○ Catch weight quantities. ○ Same batch selection. ○ Automatic reservation. <p>The following improvements that support customer rebate functionality are available in Microsoft Dynamics AX 2012.</p> <ol style="list-style-type: none"> 1. Customized Period for Cumulating Rebates. The rebate feature in Process Manufacturing for Microsoft Dynamics AX 2012 now lets customers accumulate rebates periodically. Customers who select this option can configure this period to their specific business needs. 2. New Methods to Create and Manage Rebates. Also new to Microsoft Dynamics AX 2012 is the ability to create and process rebates by different units of measure, currencies, product dimensions, and quantities. 3. Improved Rebate Maintenance. The ability to maintain current rebate agreements is more flexible in Microsoft Dynamics AX 2012. Rebate agreements can now be maintained up to the point that transactions are initiated against the rebate. Users also have the added ability to process rebates from the Payment journal form. Negative numbers are no longer allowed in the Minimum quantity and Minimum amount rebate fields. 4. Researching Customer Rebate Payments New research options are available for use in verifying the status of customer rebates. The options include the following: <ul style="list-style-type: none"> ○ Expanded search capability to let you search by transaction number. ○ The addition of two new inquiry forms – Rebate details and Rebate paid by check. Use these inquiries to determine whether rebates are issued but not yet credited, or if checks have already been issued for customers who are paid by rebate check.
Customer Rebates	2012	Process Manufacturing	<p>Containerized packaging is improved in Process Manufacturing for Microsoft Dynamics AX 2012. This feature allows for batch orders for a packed product to be consolidated with similar packed products and one or many parent bulk product batch orders. Consolidated order forms are updated to reflect the new user interface changes. Other user interface improvements to containerized packaging include the following - Consolidate on-hand, Bulk product conversion, Consolidate orders list page, Consolidate order details, Firm consolidated orders</p> <ol style="list-style-type: none"> 1. Improved Price Calculations. The Complete formula calculation form is updated to improve access to information for price calculations that include co-products. 2. Viewing Co-products for Planned Orders. You can now view co-products for a formula item or a planning item from the Planned order details form and Planned order list page by using a new co/by product option. 3. Total Cost Allocation Methodology. Total cost allocation (TCA) methodology is new for co-products in Microsoft Dynamics AX 2012. If the TCA check box is selected on the formula version, then the formula calculation is performed based on the new TCA methodology. If the TCA indicator is not selected, then the formula calculation uses existing functionality. TCA is not used for by-products in Process Manufacturing for Microsoft Dynamics AX 2012.
Containerized Packaging	2012	Process Manufacturing	<p>In Microsoft Dynamics AX 2012, when planning for the replenishment of a co-product and its planning formula (previously called planning item), all the co-products of that planning formula are planned out. Only the needed planned order replenishments remain before master planning continues to the next item.</p> <p>Group and split functionality, available in the Planned order details form, now validates that the correct route and formula versions are selected based on the quantity for the newly combined quantity or split quantity. Messages are issued to alert users when the resulting quantity is invalid for the current formula version, or when multiple planned orders for the same item are grouped and the group function selects only the formula and route versions of the last planned order.</p> <ul style="list-style-type: none"> ○ Batch cost estimates and costings: View information about batch orders. This includes the estimated and actual costs. The report shows total costs by cost group for each batch order and detailed costs for ingredients. You can use selection criteria to view only certain details, such as batch status. ○ Catch weight on-hand inventory: Print the on-hand by quantity in catch weight units. You have the option to select different product dimensions. ○ Catch weight physical inventory by item group: Print the physical inventory in catch weight units per item group for the date specified. A different SSRS report in Microsoft Dynamics AX 2012 contains similar information, but does not limit its results to catch weight items. The new report identifies the company name. ○ Co-By variance: View co-product cost variances for an ended batch order. ○ Shelf advice: Print the status of all batches for the specified shelf advice date.
Co-Products and By-Products	2012	Process Manufacturing	<p>For process manufacturing, the new purchase agreements maintain quantity and pricing information and the following additional attributes - Catch weight products (all catch weight fields are required in the Purchase agreement form for any purchase order released from a purchase agreement. The release minimum and maximum amounts are rounded to accommodate any variances in the conversion calculation, possibility correctly track fulfillment, released and invoiced</p>
Master Planning Improvements for Multiple Co-products	2012	Process Manufacturing	<p>For process manufacturing, the new sales agreements include the quantity and pricing information and other attributes appropriate for the product - Catch weight products (a release order can be created for catch weight products , ability to correctly track fulfillment, released, and invoiced quantities for catch weight products in sales agreements), Same batch selection (when the Same batch field is selected, based on the configuration of the item, every attempt will be made to reserve the order from a single batch of inventory), Auto batch reservation (this functionality enables reservation of products, based on the batch attributes specified for the customer and on those inventory batches where the batch attribute values of the inventory meet the requirements of the customer), Excluding from rebates (a new field is added to sales agreements and sales orders that allows for excluding an item on the sales order line in any rebate calculation for the customer), Releasing sales orders.</p>
Planned Orders	2012	Process Manufacturing	<p>Microsoft Dynamics AX 2012 introduces the ability to allocate and post revenue based on an internal sales price for each employee, category, and dimension. This enables companies to monitor the profitability for each allocation area.</p>
New Process Manufacturing Reports	2012	Process Manufacturing	<p>Microsoft Dynamics AX 2012 introduces new budget control functionality for projects. This feature focuses on providing a comprehensive, and user-friendly tool to manage a project's budget over the life of the project.</p>
Purchase agreements	2012	Process Manufacturing	
Sales Agreements	2012	Process Manufacturing	
Allocate Project Revenue	2012	Project management	
Project Budgeting	2012	Project management	

Project Funding	2012	Project management	<p>Many organizations frequently run projects that are paid for from multiple pools of money. For public sector organizations, payment could be from multiple grants or from a mix of internal and external dollars. In the commercial sector split funding can be used in large construction projects or it might be used when doing projects for a large customer that wants to split funding of the project to multiple divisions or sub-organizations.</p> <p>This includes the following:</p> <ul style="list-style-type: none"> ○ Users are now able to enter time for multiple projects. ○ Timesheet support in Enterprise Portal includes the ability to manage favorites and to quickly create a new timesheet based on a previous timesheet or based on favorites. ○ Improved readability of the timesheets by displaying both the ID and names concatenated for project, activity and category fields. ○ The timesheet list page lets you preview the timesheet lines without having the need to open the timesheet. ○ The timesheet line-level approvals now use support from the workflow framework for lines to achieve consistency with other tasks. ○ The timesheet review experience is improved by not displaying timesheet lines with zero hours. The system now automatically deletes such lines upon submission.
Project Timesheets	2012	Project management	<p>Microsoft Dynamics AX 2012 introduces a new feature that allows users to enter beginning balance transactions for a project. Project beginning balance transactions allow the user to input catch-up balances for the project without adversely impacting the general ledger (double entry, inflated balances, and so on).</p>
Project Beginning Balances	2012	Project management	<p>Project managers can now create and maintain projects in Enterprise Portal. In addition, users can create and update project quotations and convert approved quotations to active projects in Enterprise Portal. The primary goals for the improvements made to projects in the Enterprise Portal in Microsoft Dynamics AX 2012 include the following:</p> <ul style="list-style-type: none"> ○ Improve usability of existing features: Rendering core project accounting functionality in the Enterprise Portal provides project managers the flexibility of creating and managing projects remotely when they are in the field or away on travel. ○ Reduce deployment complexity and manageability: Rendering core project accounting functionality in the Enterprise Portal enables project managers to access project and employee information without having to install or deal with upgrades or software updates. ○ Extend analytical and visualization capabilities: A free-form entry grid with Gantt and resource views. This simplifies the task of creating and managing the project schedule. Surfacing key project information on profitability, invoicing, resource utilization, committed costs, and cash flow provides key project stakeholders insight into potential risks.
Manage Projects in Enterprise Portal	2012	Project management	<p>Some users, both internal and external to the company, must access the Case management functionality. This requires access to cases through Enterprise Portal. The availability of Case management in Enterprise Portal will let infrequent users of the case management functionality access lists of current cases and create new cases. The Case management tool set version in Microsoft Dynamics AX 2012 provides the experts who are using the rich client a set of strong tools to handle cases.</p>
Case Management in Enterprise Portal	2012	Project management	<p>The inventory dimension groups can be set up at an organizationally independent level or at the legal entity level. Dimension groups set up at the organizationally independent level can be overridden at a legal entity level.</p>
Product Dimension Locations	2012	Supply Chain Management	<p>The product dimension group is completely dedicated to product masters. This lets users define configuration technologies. When you work with product masters it is important to define how the variations of a master are created. Frequently, many mandatory attributes must be specified to create a new variation.</p>
Configuration Technologies	2012	Supply Chain Management	<p>To allow for a more centralized process, Microsoft Dynamics AX 2012 introduces the concept of products, or product definitions. Product definitions are created independently of a legal entity, and core values such as product number, type, and name are shared values. A product in Microsoft Dynamics AX 2012 consists of a core product definition. This is defined independently of the organization where it is used. As soon as the product is authorized for use in a company, the additional organizationally dependent details such as costing, coverage plans, taxation information, and preferred vendors for supplying the product and much more, is set up in the respective legal entities.</p>
Products	2012	Supply Chain Management	<p>The release product process is designed to allow for users in an enterprise to push product definitions to various organizational units. By releasing a product or a product master you associate it with a company and authorize the product definition for use in the company.</p>
Releasing Products	2012	Supply Chain Management	<p>You can enter descriptions and product names for multiple languages. The product name and description are optional, and only the product number is required.</p>
Product Translation	2012	Supply Chain Management	<p>A product variant is a product that has a size, color or configuration and is grouped by the product master. A product variant is a configured variant of product dimensions and it must be based on a product master. Only products and product masters can be released to companies directly. Product variants are always released through a product master.</p>
Products Masters and Product Variants	2012	Supply Chain Management	<p>The following changes in Intercompany in Microsoft Dynamics AX 2012 affect the setup:</p> <ul style="list-style-type: none"> ○ Intercompany relations. Microsoft Dynamics AX 2012 does not use the endpoint setup. Instead it is configured by using an Intercompany trading relation and the connection is between a customer and vendor. This new setup allows for the relationships to be shared across companies. Relationships set up like this means that you only have to set up the intercompany relation in one company. ○ Intercompany trade agreements. In Microsoft Dynamics 2012 sales and purchase order of type blanket orders are replaced with sales and purchase agreements. These agreements can also be used with an intercompany relationship. ○ Intercompany products. In Microsoft Dynamics AX 2012 a shared products repository is introduced at the shared level and all items that are created at the company level are based on a product which is organizationally independent. The product serves as a common denominator for products per company.
Intercompany Setup	2012	Supply Chain Management	<p>Companies are required to account for the value of goods in transit owned by the company. There are two reports in Microsoft Dynamics AX 2012 which show the values for Intercompany goods in transit:</p> <ul style="list-style-type: none"> ○ Intercompany goods in transit transaction ○ Intercompany goods in transit totals
Intercompany Reports	2012	Supply Chain Management	<p>If organization has multiple legal entities, you must be able to run master scheduling across those entities. To enable this functionality, many improvements are made to intercompany planning in Microsoft Dynamics AX 2012. The main improvement connects demand and supply between companies not only for short term, firm demand and supply but also for long term, planned (that is not yet firmed) demand and supply.</p>
Intercompany Planning	2012	Supply Chain Management	<p>One challenge many businesses encounter is to control cost. They want to make sure that they are purchasing the correct supplies for the best price. To increase focus on cost control, change management is added to purchase orders in Microsoft Dynamics AX 2012.</p>
Purchase Order and Change Management	2012	Procurement	<p>Change management lets you review and track history of a purchase order before it is approved. This additional check on purchase orders to make sure that you are only purchasing what is needed, helps reduce costs. Change management uses workflow which allows for different processes, depending on the purchase order.</p>

Purchase Requisition Enhancements	2012	Procurement	<p>The overall process for reviewing purchase requisitions is improved in Microsoft Dynamics AX 2012. When a purchase requisition is submitted for review, the individual purchase requisition lines can now be routed to the appropriate reviewers independently of one another. This lets reviewers take action only on purchase requests that are in their area of responsibility and to streamline processing time for purchase requisitions that have multiple line items.</p>
Business Rules for Fixed Assets	2012	Procurement	<p>The Business Rules for Fixed Asset Determination form provides a mechanism by which a company can define which products will be treated as Fixed Assets. These are based on monetary thresholds which are configurable globally across the enterprise. The configuration does not have to be done for each product individually; instead, it takes advantage of the category hierarchies. It uses the lowest level of the Procurement category hierarchy to set up the business rules defined in this specification. You can also set up capitalization thresholds per Legal entity, as some groups of products have different local versus global capitalization thresholds.</p>
Purchase Requisition Consolidation	2012	Procurement	<p>Requisition consolidation opportunities are introduced in Microsoft Dynamics AX 2012. This is a practical way to reduce procurement costs for organizations, to consolidate demand so that the total cost of a group of Purchase orders will be reduced, by offering a better price, lowered shipping and handling fees, and reduced overhead. The cost of goods and services frequently depends on several factors such as volume and timing. By consolidating demand, an organization can take advantage of these factors while negotiating with vendors. Purchasing professionals need an efficient way to analyze and manage many demand signals to increase buying power and achieve larger savings on the costs of goods and services. The following are the key benefits of requisition consolidation:</p> <ul style="list-style-type: none"> o Help organizations to exploit economies of scale o Reduce transaction costs o Better leverage with vendors o Increase compliance with corporate spending policies
Purchasing Delivery Schedule	2012	Procurement	<p>In Microsoft Dynamics AX 2012 delivery schedules are added to the purchase order, sales order, and sales quotation. These improvements let the user split an order line into multiple deliveries.</p>
Purchasing Policies	2012	Procurement	<p>Purchasing Policies are introduced in Microsoft Dynamics AX 2012. A purchasing policy is a collection of purchasing policy rules that control the requisition process for a group of requisitioners. Purchasing policies help procurement administrators implement their procurement strategy by creating a policy structure that aligns with the company's strategic purchasing needs. The following features for vendor management are added to Microsoft Dynamics AX 2012:</p> <ul style="list-style-type: none"> o Ability to associate vendors to products which they can supply. o Improvement of the current supplier diversity support. o Ability to store vendor certifications. o A vendor deactivation process for inactive vendors. o Ability to put a vendor on hold for requisitioning.
Catalog and Procurement Site	2012	Procurement	<p>The Vendor Self-Service Portal provides up-to-date information about the vendor and their products and services, current prices, and effortless transaction management ranging from printing invoices to responding to RFQs. By using a role tailored vendor self-service portal, vendors can manage all important business needs by delegating the appropriate responsibilities among the suitable personas as determined by the hosting organization. The vendor self-service portal provides vendors with the following abilities based on their user role and security (Create and change vendor information, Create vendor contacts, Request vendor user from list of contacts, Remove vendor contacts, Remove vendor users, Respond to RFQ, Upload catalogs, See notifications, Complete questionnaires, Request to be added as a vendor to a product category, View reports, View and add invoices, View payment status, line details and charges)</p>
Vendor Management	2012	Procurement	<p>Credit card dispute management provides a framework that will help enterprises automate their credit card transaction dispute process independent of the card provider for dispute management.</p> <ul style="list-style-type: none"> o Ability to identify corporate credit card transactions for dispute and start the dispute process. o Ability to generate the dispute cover letter. o Workflow based dispute management process. o Automatic notification of deadlines throughout the dispute process. o Status tracking of disputed transactions. o Electronic documentation support. o Ability to record additional case details. o Ability to reconcile temporary credit to the dispute. o Audit trail.
Credit Card Dispute Management	2012	Travel and Expense	<p>The key areas of focus are as follows:</p> <ul style="list-style-type: none"> o Ability to define more policies than are available in earlier versions by adding more attributes on which policies can be defined such as Level II and III credit card data attributes o Removing attributes that do not make sense for defining policies o Adding the capability to create policies for Travel Requisitions. This is in addition to the expense policies that are currently available in Microsoft Dynamics AX 2009. o Moving the Policy violation functionality onto the new Policy Framework. This framework is useful for the following reasons: <ul style="list-style-type: none"> - Helps ensure a consistent user experience across applications - Provides support for the enterprise organization model - Provides date affectivity support
Travel and Expense Policies	2012	Travel and Expense	

Generally, the success of a budget is limited to an organizations ability to monitor actual spending and the tools and policies that are enforced to control in the following lists:

Budgetary Control	2012	Travel and Expense	<ul style="list-style-type: none">o Pre-Trip- Creation of pre-trip requisitions- Approval of pre-trip requisitionso Post-Trip- Submission of expense report that has all the expense transactions from the trip.- Approval of expense report.- Posting of expense reports.
Expense Reports Improvements	2012	Travel and Expense	This includes the expense entry, cash advance request, credit card dispute, travel requisition, and expense report delegation.

