What's New in Microsoft Dynamics AX 4.0

New Functionality Name	AX Version In Which This Feature Was Introduced	AX Module Name	New Functionality Description
New Scorecard Structure	4.0	Balanced Scorecard	Balanced Scorecard features are now available directly from the Navigation pane. In earlier versions, Balanced Scorecard features were available from the Human Resources section of the Navigation pane. In earlier versions, the Chart of knowledge accounts represented a single, corporate level scorecard. The new scorecard structure allows the administration of any number of scorecards at the employee, department or organizational unit, or corporate levels. The new structure is hierarchical, meaning that all components are dependent on others and cannot exist independently. For example, objectives cannot be created without being linked to a scorecard; measurements cannot be created without being linked to objectives.
Creating Measurable Objectives	4.0	Balanced Scorecard	Objectives are new in this version, and are arguably the most important component of a scorecard. Objectives are the operational level achievements necessary to realize a scorecard's overall strategy, and cannot exist independent of a scorecard.
Global Search is now available from the Task pane	4.0	Core	Use Although Global Search from your task pane to search for information across selected tables.
Navigation Pane and New Look and Feel	4.0	Core	Navigation Pane that has the same look and feel as other Microsoft products such as Microsoft® Outlook and Microsoft® Internet Explorer, this reduces training and user adoption down time by using familiar client controls, user interfaces, and navigation paradigms; improves usability and accessibility for menus, toolbars, and keyboard commands.
Alerts feature	4.0	Core	Create alerts to remind you about: Overdue deliveries, Deleted orders, Changed prices or other Events that require action or your attention.
Help enhancement	4.0	Core	When someone wants to access the help solve the problem, this can now be accomplished without starting and opening Microsoft Dynamics AX.
Native unicode support	4.0	Core	Microsoft Dynamics AX 4.0 supports all languages by running Unicode.
Microsoft SQL Server 2005 Reporting Services	4.0	Core	Microsoft SQL Server Reporting Services is a comprehensive, server-based solution that enables the creation, management, and delivery of traditional, paper-oriented reports and interactive, Web-based reports.
End User Sort	4.0	Core	In SQL Server 2005 Reporting Services, the report author can add the ability for the viewer of a published report to resort the data within his or her report.
Report Management Expanded Functionality	4.0	Core	Report definitions, folders, and resources are published and managed as a Web service.
Integrated Security	4.0	Core	One of the most significant improvements is the integration of the full Microsoft Dynamics AX security model with SSRS report models.
Drill Down	4.0	Core	Using Print drill Down The benefits of Print Drill Down users have ability to navigate without using main menu, Data is automatically filtered at destination, Fewer form switches and Security is automatically enforced.
Output Management	4.0	Core	In addition to the output options included in previous versions, Microsoft Dynamics AX 4.0 has expanded this capability. Users now have the option to select Non Collated printed. This option is useful for those wanting to run multiple copies of documents on different color forms. The other major change is with respect to the PDF output option. In Microsoft Dynamics AX 4.0, this now uses the Adobe Acrobat PDF generation engine, and therefore, Adobe is required.
Visual Studio Integration	4.0	Core	SQL Server 2005 Reporting Services includes a set of Web Parts that make it easy to integrate reports into a SharePoint Portal Server 2003 or Windows SharePoint Services environment. For advanced report design, the full power of the Visual Studio suite is available to the developer.
Report Builder doesn't require to know underlaying data structure	4.0	Core	Report Builder incorporates a user friendly business query model that enables users to build reports even if users do not possess deep technical understanding of the underlying data sources.
Report Delivery	4.0	Core	Users can view reports in a Web-Based format or in e-mail. SSRS provides the user with multiple output formats for maximum flexibility.
RFID	4.0	Core	The introduction of Radio Frequency Identification (RFID) technology brings manufacturers and distributors improved visibility into their supply chain by increasing the number of data capture points.
User Favorites	4.0	Core	Users may set up a Favourites Pane with selected menus from the Navigation Pane to speed their access to widely used functions.
Web based report access and management	4.0	Core	Report Manager is a Web-Based report access and management tool that enables access through Microsoft Internet Explorer. It is used to administer a single report server instance from a remote location over an HTTP connection.
Windows Authentication logon	4.0	Core	Microsoft Dynamics AX logon is moving to an Active Directory-based solution that improves security and administration. Users now only need to log on to their computers that have Microsoft Dynamics AX 4.0 loaded to have access Microsoft Dynamics AX.
Windows Server 2003 Support	4.0	Core	Further integration with the Microsoft technology stack eases setup and administration tasks. Building on Microsoft Windows Server 2003 provides security, reliability, availability, and scalability. Microsoft has also improved and extended the Microsoft Windows Server operating system to incorporate the benefits of Microsoft .NET for connecting information, people, systems, and devices into Microsoft Dynamics AX 4.0.
enhanced Synchronization between Microsoft Dynamics AX and Microsoft Office Outlook	4.0	Sales Force Automation	Three objects can be synchronized: ○ Tasks ○ Appointments ○ Contacts Steps have been taken to enable flexible options for synchronizing these objects. Users can lock objects when they are being edited and synchronized so other users cannot change the objects. This avoids users overwriting each other's changes when they are modifying or synchronizing the objects at the same time.

Feature	Version	Module	Description
Sales statistics are enhanced	4.0	Sales Force Automation	Sales statistics are enhanced. These enhancements include: ○ Flexible graphing options ○ Flexible sales periods ○ New data retrieval options – Sales and quotation categories – Business relation categories – Product categories – Campaign categories – Telemarketing categories
Cost balance	4.0	Cost Accounting	The form Total values, now called Cost balance, is redesigned and can display a value type over two different periods, so user has more options on how to display total values. The Cost balance also enables drill-down forma cost line to a cost category without leaving the form.
Accrual Schemes	4.0	Cost Accounting	The functionality of Accruals is rebuild according to the General Ledger, and there is a new form Accrual schemes used for the setup. The Accrual scheme consists of several rules on how the accruals are executed. These rules are set up in the Accrual schemes form in the Setup menu. The Accrual scheme is selected in the Accrual identification field when you create Accruals in the Accruals form.
Cost and Service Distribution	4.0	Cost Accounting	You can now distribute not only costs and services that are posted without a dimension, but also those posted with a dimension. This lets you redistribute the costs and services on any dimension including the original one, but only on the same cost category. The distribution of costs posted with dimension can be used if the reallocation on the same cost category is needed. In this case a user does not have to use allocation, but only the distribution. If costs are reallocated on the original cost category, these costs can additionally be processed by distribution or by allocations.
Budgeting	4.0	Cost Accounting	Besides budget models it is now possible to create more complex models by using the existing models as sub-models to provide the user as variable budgeting tool as possible. If sub-models are linked to the one main model, the main model provides the user an overview of total budget costs over all sub-models including the main model. The budget functionality is enhanced with the ability to enter budget costs not using the Budget overview form, newly called Budget form, but using the Cost budget and Service budget, that is in the Journals menu.
Import XBRL Taxonomy	4.0	Financials	The XBRL taxonomy manager: A tool which enables importing XBRL taxonomies located on the Internet, at http://www.xbrl.org or on the hard disk. XBRL mapping facilities: Facilities which enable mapping between taxonomy elements and combinations between ledger accounts - dimensions. XBRL report: A reporting facility which uses the financial statement engine to generate instance documents (files that have a *.XML extension and the appropriate format) according to XBRL Specifications.
Payment Method and Proposal	4.0	Financials	Microsoft Dynamics AX 4.0 specifies different payment attributes on methods of payment to be transferred to the payment proposal. The purpose of the payment attributes is to retain this information regardless of the period defined.
EU115 Sales Tax Directive	4.0	Financials	The European Council requires that companies record justification for sales tax exemption. If no sales tax is applied to trade documents, it is necessary to report why the sales order is sales tax exempted. In Microsoft Dynamics AX 4.0, it is now possible to: ○ Associate a sales tax exempt description in trade documents. ○ The sales tax exempt description is saved on sales tax transactions for history and reprinting.
Aging Buckets	4.0	Financials	The typical business process requires the ability to quickly analyze third-party open balance situation from different view angles. Aging buckets have been implemented in Microsoft Dynamics AX 4.0 to efficiently inquire on third-party balances.
Refund Checks	4.0	Financials	Under certain circumstances companies must generate payment refunds to their customers or to process refunds received from their vendors. This usually occurs when credit notes, over-payments and bonuses are involved in third-party transactions. In Microsoft Dynamics AX 4.0 it is possible to create a check refund that prints out a check. The refunding feature is implemented in payment journals for customers.
Default Vendor Account Setup	4.0	Financials	Improvement to set up default vendor accounts for fast and efficient entry of vendor invoices.
Transaction Reversal	4.0	Financials	The transaction reversal feature enables the user to easily reverse transactions that were entered and posted incorrectly.
Consolidation According to the FASB 52 Regulation	4.0	Financials	FASB 52 concerns the consolidation of a mother company and a subsidiary using different currencies.
Ledger Accrual	4.0	Financials	Most common accounting rules require companies to report income when earned expenses are incurred. Standard practice is to record and recognize revenues and expenses in the period they are incurred, because of their significance to the future income and cash flow of the company. In Microsoft Dynamics AX 4.0, the Accrual schemes feature is implemented to defer the cost or income throughout the year.
Depreciation Books, Conventions and Bonus	4.0	Fixed Assets	Use Depreciation books to track information that is used only for tax or other non-financial purposes without affecting the general ledger.
Move Employment Affiliations can be done for all employees in a unit.	4.0	Human Resource Management	Formerly, if moving an employee from one organizational unit or position to another in Microsoft Dynamics AX Human Resources, users had to terminate the affiliation with the old unit and then rehire the employee in the new unit. This process only occurred for one employee at a time, which was repetitive and time consuming. Now, users can perform the same procedure for all employees in a unit. Additionally, there are options for handling the status of the current position and organization unit.
Absence Requests functionality changes drastically	4.0	Human Resource Management	In earlier versions of Microsoft Dynamics AX Human Resources, it was only possible to register absences after the fact; requests for future absence dates occurred outside the system. The advent of the Absence Request functionality changes all that. Users can transfer requests, which can be accompanied by a note elaborating on the request, for a single date or a series of future absence dates to an approver. The approver can approve or reject the request. In the case of a rejection, the approver can also provide a note explaining the denial.
E-recruitment	4.0	Human Resource Management	The E-recruitment features make it easier to reach a larger number of potential applicants by integrating recruitment project job advertisements with the Enterprise Portal. E-recruitment features also facilitate validation of employment applications submitted from the Enterprise Portal in response to an advertisement. These features can significantly improve recruitment project effectiveness, and simplify the way in which a company receives and processes employment applications submitted from the Internet.
Mass hire	4.0	Human Resource Management	Mass hire projects speed up hiring and termination processes, and at the same time reduce data administration by allowing users to manage information for many people at the same time.
Intercompany Master Planning Principle	4.0	Master planing Intercompany	Planners throughout the chain of all "Intercompanies" benefit from using Master Scheduling as it provides a material and capacity overview that informs the customer when to deliver a sales request. The planners use the known processes with the addition of an Intercompany master schedule.

Intercompany Master Planning	4.0	Master planing Intercompany	Master scheduling between multiple companies is possible in Microsoft Dynamics AX 4.0 under the condition that all companies are running in the same database. This enables the chain of companies to react to a demand from the selling company and transfer this to a demand down the chain as a purchase order. In the related company the purchase order becomes a sales order which can be transferred into a purchase order still another related internal company.
BOM Calculation	4.0	Production	In Microsoft Dynamics AX 4.0 the calculation principle has been changed and improved. It now calculates the BOM structure as a single calculation for the actual quantity. Separate calculations for each sub-BOM must not be performed. Based on all sub BOMs, on all levels and operations, Microsoft Dynamics AX 4.0 gives a total cost and sales price calculation. Any change in the quantity of the series used in sub BOM is included in the calculation.
Quantity Dependent BOM & Route Version	4.0	Production	Quantity Dependent BOM & Route Version function benefits a company in many ways, but is mainly used to minimize the manual interaction from order entry to production execution. This can minimize the errors associated with version changes.
Setup of Range and Active BOM and Route	4.0	Production	Microsoft Dynamics AX 3.0 handles multiple versions of the BOM and routing but only one is active for a date period. The same logic is used for Microsoft Dynamics AX 4.0, but it uses a mandatory combination of the date interval and the quantity interval to make the unique selection. Microsoft Dynamics AX 4.0 handles many active BOM versions for the same period but for different quantities in addition to many active BOM versions for the same quantity but for different date periods.
Shop Floor Control	4.0	Production	Dedicated job table (makes the update of registration forms more versatile), Integration of absence registration with human resources, Configuration of registrations forms.
Nww Production Feedback feature	4.0	Production	When you start a production order or provide quantity feedback, you can also provide feedback regarding the picking list. If for example, another batch of raw material has been used or actual material consumption is larger than calculated, provide this feedback directly using Shop Floor Control.
Notice Board	4.0	Production	The notice board in Microsoft Dynamics AX 4.0 enables supervisors and managers to send messages to specific employees through the registration form. The notice board has a read receipt feature to see whether a specific employee has read the message. Supervisors and managers can benefit from these new features as they are now able to direct information to exactly those who need it and can verify that the information has been read.
The new Cleanup Registrations feature	4.0	Production	A new feature has been added to let users move or delete old registrations. Fewer records improve overall performance.
Product Builder	4.0	Product builder	Product Builder in Microsoft Dynamics™ AX 4.0 simplifies and streamlines the process of ordering, planning, and producing customized products, helping customers to win orders and increase customer loyalty. Product Builder in Microsoft Dynamics AX 4.0 offers several new features including: ○ Improved validation rules system ○ Graphics for configurable items ○ Product model creation wizard These improvements help users work with Product Builder for Microsoft Dynamics AX more easily and reinforce its integration with other Microsoft Dynamics AX modules.
Multiple Compilation of Product Models	4.0	Product builder	A new product models multiple compilation functionality has been introduced. Users can compile the modeling tree and validate rules for several product models at the same time.
Automatic and Mandatory Configuration	4.0	Product builder	In previous versions of Microsoft Dynamics AX, it was only possible to automatically calculate item sales price and delivery date. Four new options are available to make item configuring mandatory, automatic, or half-automatic. All four options are set up on the General tab of the Items form.
Enhancements in product model form	4.0	Product builder	It is now possible to use drag-and-drop function when building the modeling tree. A list of icons has been added to the form that shows available node types. The functionality is similar to the BOM designer. When creating a new node or moving an existing node, drag the icon to the position in the tree where the node should be placed.
Enhancements in Parameters form	4.0	Product builder	In the Parameters form, the enhancements include: ○ A new Lookup method field has been added. ○ In a previous version, it was only possible to select either reusing or not reusing existing configurations when configuring an item. This functionality has been extended: the Reuse configurations check box has been replaced with the optional field. ○ Two new number sequences for rule clauses and sets have been added.
Validation Rules	4.0	Product builder	The Product Builder rules system has been extended and changed. It now has three different kinds of rules: Formulas, Actions, Constraints. Moreover, all the rules in a product model are available from a single form, which improves the overview of the product model rule system. In previous versions, the different types of rules attached to a product model had to be looked up separately.
Create Production Order from Sales Order	4.0	Production	When you create a production order directly from a sales order line Microsoft Dynamics AX 4.0 automatically selects within the valid date and quantity ranges. The sales representative or planner does not have to manually set this up. This feature is useful to many companies and industries.
Production Order Costing	4.0	Production	Production order costing has been improved so that only inventory transactions that are fully completed and marked "end job," update the inventory transactions which then updates the cost value.
Subcontracting	4.0	Production	Microsoft Dynamics AX 4.0 adds to subcontracting functionality for easier logic usage.
Special Days	4.0	Production	A Special day in Shop Floor Control is a date that must be handled differently than the standard approach. An example is a national holiday. The primary benefit of this feature is that users do not have to change a pay agreement for a specific day and change it back the next day. This feature provides tools for specifying pay and absence for this Special day.
The new Work Planner	4.0	Production	The new Work planner tool is a graphic tool that enables supervisors and managers to plan employee work schedules. When the selected period is planned the result is saved in the form of entries in the Profile calendar. The standard way for the shop floor control system to apply profiles for employees is to combine the clock in time for the employee and the employee's profile group. The Work planner lets users decide the profile beforehand while planning a three shift team for the next week or month.
Users can Configure Registration Forms	4.0	Production	In Microsoft Dynamics AX 4.0, users can configure the registration forms to fit the forms to the specific needs of the company, department, or employee. For example, the registration form can be configured to show relevant types of jobs when an employee registers his or her ID. Some of the benefits of this feature are: ○ The employee sees only the required information. ○ Less input is needed from the employee meaning less time spent on registration and a reduced risk of errors.

On call provides new pay option	4.0	Production	The benefit of the new type of indirect activity is that On call provides the possibility of calculating pay for employees with on call duties. The employee with on call duty clocks in using an on call activity. This activity contains information about clock in time and subsequent clock out time, even though the employee registers on several different jobs before clocking out again. This means that bonus pay can be generated based on the exact time the employee has worked. If the employee receives another bonus for the second or third time of being called to work, set up different indirect activities and delimit the pay using the different indirect activities.
Absence Codes migrated to HRM module	4.0	Production	There may have been a code for illness in the shop floor control and human resources modules, now you need only one code.
The Estimate form has been improved	4.0	Project	The Estimate form has been improved to provide a better overview of the estimate project's economy before posting.
Internal project has been subdivided into three new project types	4.0	Project	The three new internal projects types : ○ The time project is a gathering of hours without ledger postings. Examples include holidays and education. ○ The cost project posts all costs of hours, expenses, and items to the Profit &Loss (P&L) statement and cannot be capitalized. ○ The investment project uses the estimate system to capitalize the costs of hours, expenses, and items during the project.
New reports have been added	4.0	Project	These additional reports provide different pictures of project performance. For example, they can be used to measure the performance of a particular category. If a project category corresponds to a department in a company, the report can be used to compare costs and revenue for the individual department.
The improved Invoice Control form	4.0	Project	The improved Invoice Control form: ○ Provides an easy way to view both invoice and non-invoiced transactions. ○ Displays the quantity of hours in addition to the hours cost. ○ Provides access to the individual transactions to be adjusted after posting.
	4.0	Project	The following new features have been introduced in Microsoft Dynamics AX 4.0 Project Accounting: ○ Project quotation lines can be converted to project forecasts. ○ Improved invoice control enables viewing of invoiced and noninvoiced transactions. ○ Adjustments can be made to individual transactions. ○ Internal projects can be configured as time, cost or investment projects. ○ An elimination can be reversed. ○ A new statistics form provides an easier way to compare actual to budgeted costs.
New statistics form has been introduced	4.0	Project	The new form makes it easier to compare the project economics to the budgeted amounts. For example, the deviation view shows the actual project costs, budgeted costs, and the difference between the two. The project manager can then view the: ○ Current actual costs applied to the project ○ Budgeted costs from the forecast ○ Difference between the two
Transit Warehouses (Transfer Orders)	4.0	Intercompany Warehouse Management	The concept of transit warehouses in the transfer process is a new feature for Microsoft Dynamics AX. Items that are in transit cannot be reserved for use in another order or other type of issue. This is because the items are physically unavailable for allocation as they are being transported from one location to another. Therefore, when you create a transfer order a transit warehouse is used for the period that the items are being transported. Transit warehouse represents the transport, for example a VAN, truck or airplane between the From warehouse and the To warehouse.
Delivery Date Control and Transfer Orders	4.0	Intercompany Warehouse Management	Delivery date control functionality in sales orders enables you to find the earliest possible delivery date to the customer based on several factors such as transport calendars, transport time, receipt calendars and other time elements. In Transfer orders the delivery date control performs the same function with regard to the earliest receipt date at the To warehouse.
Transport Time (Transfer Orders)	4.0	Intercompany Warehouse Management	In Microsoft Dynamics AX you can specify transport times between warehouses when you create a transfer order between the two warehouses.
Inercompany	4.0	Intercompany	Many enterprises have established companies in several different locations, either in the form of a holding company with affiliated production and sales companies, or in the form of production and sales companies that purchase or sell directly among themselves. Frequently companies consist of many subsidiaries spanning different countries, languages, and currencies. Typically, internal trade between companies involves lots of duplicate manual data entry. This can result in a waste of resources and an increased risk of errors occurring. With today's fast, secure, and effective communication lines, it makes sense to use one common business management solution for trade between affiliated companies. This common system results in automation of many processes and reduces the need for manual data entry.
Return Order (Intercompany)	4.0	Intercompany	User can perform a return order using the intercompany order chain.
Settlements and Intercompany	4.0	Intercompany	With the setup under the intercompany endpoints on registering the payment in the accounts payable in company 1 the payment is automatically registered and posted in company 2 without the intervention of an accounts receivable clerk.
Price Simulations (Quotations)	4.0	Trade Agreements	Price simulation tool to aid sales personnel in calculating and saving various pricing scenarios for sales orders. The price simulation tool enables discounting on a total quotation basis or on a quotation line basis and calculates the effect of the discounting on the contribution margin. New information is calculated immediately and displayed in the appropriate fields. Personnel can then decide to apply the changed information directly from the price simulation form.
Quantity Dependent BOM	4.0	Trade Agreements	Companies with demands shifting between low and high quantities can automatically enable the change of BOM and Route to the actual demand. Previously this process was manual, time-consuming, and subject to possible errors. This new functionality enables these choices: ○ On the BOM the best choice of raw material for a process can be selected in base data.
Project Quotations	4.0	Trade Agreements	The unified data model helps guarantee data consistency and empower users to work smarter and also retrieve insightful statistical information in the quotation management process. Now clients can be served with a generic project quotation type, or quote for items, hour costs, expenses, and fees. Now project quote hase ability to determine a contract amount and to link an existing or new project to a quotation that was won.
Multiple Ship To	4.0	Warehouse Management	The new multiple ship to functionality lets users specify delivery addresses per order line instead of just according to the order header, as was the case in earlier versions of Microsoft Dynamics AX.

Enhanced Delivery Date Control	4.0	Warehouse Management	Enhanced delivery date control supports the user in their daily work and takes the complexity out of giving realistic delivery dates. The user may take orders and Microsoft Dynamics AX determines whether the requested delivery date for the customer can be met from a shipping perspective. If a requested delivery date cannot be met the user is provided with user friendly simulation possibilities helping them find a resolution to the requested delivery date problem.
Release Sales Order Picking	4.0	Warehouse Management	The focus on process oriented workflows in AX 4.0 has additionally been enhanced by the introduction of the Release order picking form. This form gives warehouse managers an overview of current sales order lines that have been released for picking based on the actual availability of on hand inventory to fulfill the orders. Additionally by using customer classification categories warehouse managers can prioritize which sales order lines to pick.
Transfer Orders	4.0	Warehouse Management	The new Transfer order form gives users a more process-oriented way of handling transfer orders between warehouses in the same company.
EPC usable	4.0	Warehouse Management	EPC is supported, it is the next generation of product identification. The EPC is a simple, compact license plate that uniquely identifies objects in the supply chain.