



Microsoft Dynamics AX

# Factsheet

## Amazing customer experiences through intelligent operations

Delivering customer experiences is top of mind for every retail organization, and the use of technology is a talisman for the delivery of this. Building on the Microsoft vision around a desire for 'more personal computing,' retail is at the forefront as organizations respond to the need for customers to shop in any mode, on any device, and at a time convenient to them. Offering a frictionless and rewarding experience to your customers, regardless of their shopping style during the purchase cycle, is a key differentiator to keep them coming back to you. This, in turn, will increase their spend frequency and turn them into advocates of your brand. Offering the right tools to your customers and associates to enable this experience is of paramount importance, whether it's the in-store experience, arming associates with intelligent tools to deliver exemplary service, or providing scalable computing through the cloud to enable high, but elastic, volumes of computing as customers use their own devices to transact. Customers move from social networks, to online stores, to in-store experiences, and as they do this, they expect a seamless, integrated, and consistent engagement with you.

## Global expansion with flexible deployments



### Deployment flexibility

Microsoft Dynamics AX can be deployed on the cloud, third party hosted partner clouds, or Microsoft Azure via Infrastructure as a Service (IaaS). This delivers choice and portability between on-premises and private cloud deployments, as well as the benefits and security of Microsoft Azure.



### Partners

Microsoft Dynamics AX is delivered through a global network of partners with deep vertical experience. These business partners can provide assistance tailored to your specific needs, including solution selection, planning and design, customization and configuration, implementation, training, and ongoing support.



### Mobile solutions

Connected mobile solutions based on Microsoft Dynamics AX and the Windows Mobile platform allow access to the same line-of-business applications employees rely upon in the office while they're away. This creates greater efficiencies, opens new business opportunities, drives increased productivity, and reduces costs.



### Interoperability

Microsoft Dynamics AX is built to deliver pervasive interoperability, giving users a consistent, familiar experience that seamlessly integrates with Microsoft Office and allows for improved collaboration across the supply chain.



### Microsoft Office integration

In this release, we are bringing new capabilities to increase the integration with Microsoft Office. We are now including the Excel Data Connector app, Workbook Designer page, Export API, and Document management that will let you create productivity solutions for your end users, allowing them to maximize their time.



### Services

Microsoft Services is the consulting and enterprise support division of Microsoft, which helps businesses around the world maximize the return on their investment in Microsoft products and technologies. This ranges from deploying and optimizing IT to helping businesses move forward with IT initiatives that deliver the most business value.

## Seamless commerce and omni-channel excellence



### Modern point of sale (MPOS)

With Microsoft Dynamics AX, we bring an enhanced set of features to our MPOS solution, such as payment integration and offline capabilities. Additionally, we have introduced a cloud based POS that has functionality comparable with MPOS and can be used across platforms and browsers to help reduce deployment cost.



### E-commerce

Take your e-commerce strategy to the next level with an e-commerce platform that offers support for third-party storefronts, including features such as a rich consumer API, authentication integration to any third-party open ID providers, and payment integration with search-based technology that offers accurate, timely, and consistent performance.



### Order management and payment processing

Create orders and quotes without leaving the customer's side using POS-based order support capabilities. Accept, fulfill, and track standard and special orders with a 360-degree business view, manage and apply required tax schemas, perform price and inventory checks, manage inventory reservations, and retrieve orders at a store independent of their source of creation.



### Call Center

Let workers take orders from customers directly over the phone, target customers via mail catalogs, streamline operations through fast order entry, and assist sales and fulfillment by using the call center module.



### Social integration

Enable social channels in your omni-channel strategy by gathering social insights to facilitate amazing customer experiences. Implement promotions, discounts, coupons and more via social sites, monitor performance, publish content, and manage knowledge and brand awareness.

# Effective merchandise management



## Catalog management

The Catalog Manager can create product catalogs and categorization schemes that can be targeted to, or shared between, channels. It enriches products with descriptions, specifications, product relationships, images, videos, rich text contents, and other data. Additional capabilities have been added that let organizations better define and manage mail-order catalogs.



## Merchandising

Category management allows users to centrally manage their assortment, including creation, scheduling, tracking, and using n-level deep item hierarchies and category management. Workspaces can help improve the efficiency and productivity of workers as they perform merchandising operations by letting them centrally manage the tasks and actions that are related to their merchandising role.



## Loyalty capabilities

Loyalty capabilities enable a retailer to run a global loyalty program; configure loyalty programs, loyalty tiers, and rules; associate discounts to loyalty programs and tiers; and issue cards, view balances, accrue, and redeem loyalty in any channel. Additionally, gift cards can be managed seamlessly across any channel.



## Pricing and promotions

Pricing and promotions enhancements allow organizations to offer threshold discounts based on the total transaction value, set category pricing rules, mix and match discounts, participate in retail discount concurrency rules, and manage other pricing and discount rules.

## Intelligent operations



## Workspaces

Our latest version of Microsoft Dynamics AX adds three workspaces to let employees centrally manage their tasks: the Category and Product Management Workspace, the Prices and Discounts Workspace, and the Catalog Management Workspace.



## Centralized store management

Centralized POS terminal management includes visual and functional profiles, user interface layouts, as well as employee permissions. Additionally, a consistent store/ERP data model and business rules facilitate accurate, timely data.



## Supply chain and logistics

With a real-time view of your organization and products, companies can have more efficient people and processes, a better handle on costs, happier customers, and ultimately, greater profits.



## Store operations

Store operations help retailers track inventory real time, maintain accounts receivable; keep customers coming back with customer loyalty; save time by maintaining labor records; and track layaways, track work orders, back orders, sales orders, quotes, and much more. The new Workspaces could help improve the efficiency and productivity of workers by letting them centrally manage their tasks and actions.



## Business intelligence

Take the data you are capturing across all of your channels, combine it with data from other data sources, and display it in meaningful visualizations and reports to drive your business forward and turn insight into action. Simply put, get to know your customer better and see more clearly how your company is performing.



## Hardware and payment compliance

Support retail industry standards, including object linking and embedding (OLE) point of sale (OPOS) to maximize POS hardware and peripheral choice. Manage payment card industry (PCI) data security standards compliance and ongoing support. Manage multiple or dual shift/cash drawers—enabling two cashiers to use a POS register off and on while maintaining their own cash drawer, as well as dual printer signature capture and dual scanner.

# What's new in Microsoft Dynamics AX?



## Workspaces

Workspaces help improve worker efficiency and productivity by centrally managing the tasks and actions that are related to their role.

## Category and Product Management Workspace

The Category and Product Management Workspace enables assortment management, lifecycle, and tracking.

## Prices and Discounts Workspace

The Prices and Discounts Workspace enables price and discount management for a given channel and category, rule management, and priorities.

## Catalog Management Workspace

The Catalog Management workspace a summary of active catalogs and catalog lifecycle tracking in a single location.

## Channel Deployment Workspace

The Channel Deployment Workspace lets you track channel configuration progress, complete a task, or provide information to complete the task.

## Channel Operations Workspace

The Channel Operations Workspace lets you create post statements for a channel, track shift status for a store, and manage worker POS permissions.

## EPOS client is replaced with MPOS

The EPOS client is replaced with MPOS enabling greater out-of-box channel support and providing a streamlined configuration option.

## Enhanced support for data entities

Retail data entities have been expanded, and there is enhanced support for data entities across the entire Microsoft Dynamics AX solution.

## BI reports

More than 30 back-office reports and 10 channel-side reports are now available, enabling better visibility into trend and insights.

## Consumer-level permission POS

Retailers can choose whether POS operations can be available to consumers for self-service scenarios and provides the ability to configure.

## Configuration manager and validator

This feature provides the ability to bootstrap the configuration, validate the status of the configuration, and manage entity configurations.

## New hardware profile

An added hardware profile supports more diverse hardware from one station to the next, providing greater flexibility and security.

## OData V4 support

This new support will help the customer stay current with OData standards and help to integrate sales across in-store, mobile, and online.

## E-commerce API

The E-commerce API is available through Retail Server to support online scenarios and provides hosted services for third-party online stores.

## Cloud re-engineered Commerce Data Exchange

Commerce Data Exchange has been re-engineered for the cloud and for managing data transfer.

## Credit/debit card features enhancements

New credit/debit card enhancements let customers process payment transactions and supports plug and play.

## Device activation

Device activation can be made using Microsoft Azure Active Directory increasing security and cloud-based activation.

## Rich media content support

Manage rich media content for authoring and serving through Media Gallery, alleviating pain points around externally hosted images.

## Modern POS

Allow sales staff to process sales transactions, customer orders, and perform daily operations from mobile devices anywhere in the store.

## Cloud POS

We are introducing a browser-based POS with functionality similar to MPOS and device activation support using AAD.

## Flexible e-commerce platform

A robust e-commerce platform is provided to support third-party storefronts, enabling integration with content management systems.

## Call Center

Let workers take orders over the phone, target customers via mail catalogs, and streamline operations through fast order entry.

## Warehouse Mobile Device Portal

A stand-alone installer can be downloaded directly through a menu item in Warehouse management instead of the standard setup process.

## Delivery alternatives page

The Delivery alternatives page offers a new user experience for order promising based on existing algorithms for delivery date calculation.



# Microsoft Dynamics AX Factsheet

© 2016 Microsoft Corporation. All rights reserved. This document is provided "as-is." Information and views expressed in this document, including URL and other Internet Web site references, may change without notice. You bear the risk of using it. Some examples are for illustration only and are fictitious. No real association is intended or inferred.

This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal, reference purposes.

