

Microsoft Dynamics 365 for Operations

Reasons to accelerate your path to the cloud with the new Dynamics 365 for Operations



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Microsoft Dynamics 365 Enterprise
Microsoft Dynamics AX
Gold Enterprise Resource Planning
Gold Cloud Platform

Learn more about Microsoft Dynamics 365
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About the new

Microsoft Dynamics 365 for Operations

Welcome to the Age of the Customer. An era where mobile has transformed the way we work, social media, has transformed the way we connect, and the Internet of Things is threading together the pieces of the world in ways we couldn't have imaged only a few decades ago.

As technology continues to reshape our world, it has created new baselines for what customers expect from businesses. They want to be able to see product availability information from their devices while they're on the way to the store. They want to order a product online and have it delivered the next day. They want products personalized to meet their specific needs and wants. And they want all of this to work seamlessly and flawlessly.

The new Microsoft Dynamics 365 for Operations gives organizations an exceptional customer focus. Through the power of the cloud, it is now easier than ever to seamlessly engage with customers across all of their devices. The new Dynamics 365 for Operations introduces a new, easy to use UI, new functionality, amazing integrations with Excel and Power BI, and through Lifecycle Services, migrating and managing your implementation is easier than ever.

Keep reading to discover more ways that upgrading to the new Dynamics 365 for Operations can help transform your business.

[Dynamics 365 website](#)

[Pricing & licensing guide](#)

[What's new?](#)

[Availability guide](#)

[Roadmap](#)

Extending ERP to mobile users has a **17% increase** in productivity of those users.

#MSDyn365

#migrate

IDC Custom Solutions, Achieving Greater Productivity Through Business Solutions. Randy Perry, Christine Dover, August 2015. This graphic was published by IDC Custom Solutions as part of a larger research document and should be evaluated in the context of the entire document. The IDC Custom Solutions document is available upon request from this link

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Reasons to migrate to the new Microsoft Dynamics 365 for Operations



New end user
experience



Ensure predictable
implementations



Build on an elastic
platform



Adopt out of the
box HA/DR



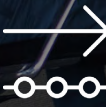
Be mobile-ready



Integrate with
productivity tools



New functionality
reduces customization















































Leverage migration
tools



Reduce hardware
costs

What's new with Microsoft Dynamics 365 for Operations?














































5

Functionality, services, and tools	AX 2009 and 4.0	AX 2012	AX 2012 R2	AX 2012 R3	Dynamics 365 for Operations
New end user experience					
Reduce customizations (up to 40%) due to added functionality					
Code* and Data migration tools					NA
Reduce HW upgrade costs investments					
Predictable and repeatable implementations across your organization					
Platform elasticity					
HA/DR					
Mobile-ready and access anywhere					
Integration with productivity tools					




































Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide

* Code upgrade only available for AX2012 deployments

New retail functionality

Functionality, services, and tools	AX 2009 and 4.0	AX 2012	AX 2012 R2	AX 2012 R3	Dynamics 365 for Operations
Point of Sale, assisted sales, and centralized store management					
Cloud POS and retail IT workspace					
Omni-channel management					
Order management, processing and payment					
Merchandizing and catalog management					
Rebates, royalties, and trade allowance management					
eProcurement and vendor self-service portal					
Supplier relationship management					
Direct and indirect procurement					

New manufacturing functionality

Functionality, services, and tools	AX 2009 and 4.0	AX 2012	AX 2012 R2	AX 2012 R3	Dynamics 365 for Operations
Inventory management and demand forecasting					
Multi-site advanced warehouse management					
Order promising					
Distribution planning					
Transportation management					
Product Change Management					
Master data management					

Note: This table provides only a graphical representation. For detailed functionality please refer to the product guide

New end user interface



Channel deployment

Description

The new Microsoft Dynamics 365 for Operations offers new features and industry functionality across retail, manufacturing, finance, and supply chain management. And through the power of the cloud, users can unlock new capabilities to make implementations easier and improve productivity.

Functionality, services, and tools

Industry functionality (WMS, TSM, retail)

Benefits

- Turn data into actions
- Reinvent business process
- Reimagine business insight

Dynamics 365 for Operations

AX 2009 and 4.0 / R1	AX 2012	AX 2012 R2	AX 2012 R3
Atlanta	Atlanta	Atlanta	Atlanta
Atlantic City	Atlantic City	Atlantic City	Atlantic City
Boston	Boston	Boston	Boston
Burlington	Burlington	Burlington	Burlington
Cambridge	Cambridge	Cambridge	Cambridge
Georgetown	Georgetown	Georgetown	Georgetown
Miami	Miami	Miami	Miami
New York	New York	New York	New York
Philadelphia	Philadelphia	Philadelphia	Philadelphia

Details

- **Intuitive UI:** A new user experience gets users up to speed quickly. Turn data into actions and leverage an easy-to-use, familiar solution that looks and works like Microsoft Office 365.
- **Personalized Workspaces:** Enable users to be more productive with activity-based Workspaces that connect people to the information and data they need. Workspaces allow users to manage assets and business processes in real-time while providing a task specific experience and a tighter integration with Office 365 productivity and collaboration applications.
- **Custom dashboards:** Work faster, enable collaboration, and get insights by seamlessly sharing information between Microsoft Dynamics 365 for Operations, Office 365, and Power BI.
- **Intelligent insights:** Optimized Power BI content Packs, Cortana Analytics, and Machine Learning to enable intelligent decision making.

Summary

New Dynamics 365 for Operations, new user interface

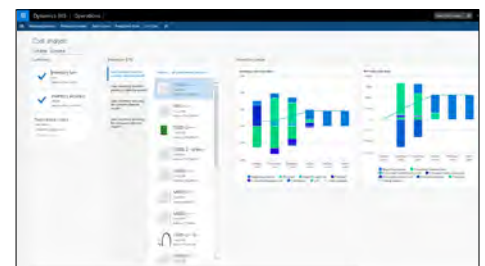
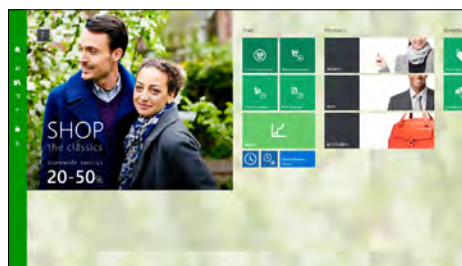
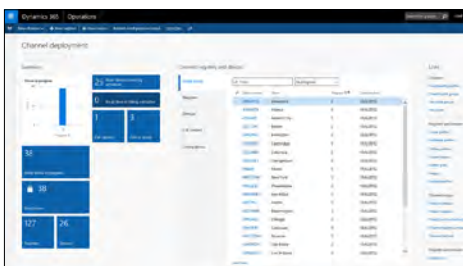
Leverage a new UI and new industry functionality for industries, including retail, manufacturing, finance, and IT functions.

Additional resources

Learn more about the new features in our What's new? document.

What's new?

Screenshots



Predictable implementations



Description

With Lifecycle Services (LCS) in the new Microsoft Dynamics 365 for Operations, organizations get quicker, more predictable paths to achieving results. By getting enterprise best practices across every phase of the project lifecycle, LCS empowers organizations to deliver predictable, efficient, best practice implementations.

Functionality, services, and tools

Predictable and repeatable implementations across your organization

AX 2009 and 4.0



AX 2012



AX 2012 R2



AX 2012 R3



Dynamics 365 for Operations



Benefits

- Best practice implementations
- Rapid deployment
- Better process management

Details

- **Lifecycle Services:** Microsoft Dynamics Lifecycle Services (LCS) is a cloud-based, collaborative portal that helps manage the application lifecycle of Dynamics 365 for Operations implements.
- **Repeatable processes:** LCS helps deliver a repeatable deployment process, whether a roll out, update, or upgrade, and provides the IT team with greater insight, control, and management to give them peace of mind about their implementations.
- **Business process modeler:** Standardize your business processes (currently 600+ flows are defined) across the organization. Provide dynamic business process documentation of your implementations by using the Business process modeler to create, view, and modify business-process hierarchies and flowcharts.
- **Monitoring:** Periodic, proactive monitoring of the system can help reduce system downtime.
- **Task guides:** Easily capture process flows that can be uploaded to Business process modeler for modification, version tracking, and export to Microsoft Visio. Use the flows to automate the creation of test scripts in Visual Studio to help speed development and improve quality. Utilize the flows as Task Guides for in-product training to speed onboarding and drive user adoption.

Summary

Predictable, repeatable implementations

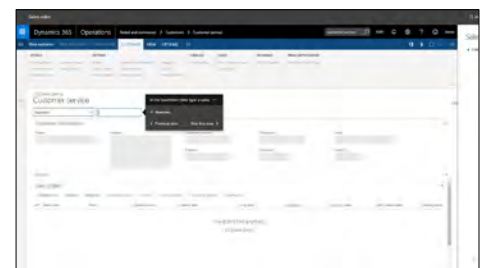
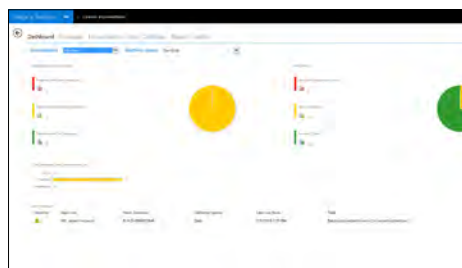
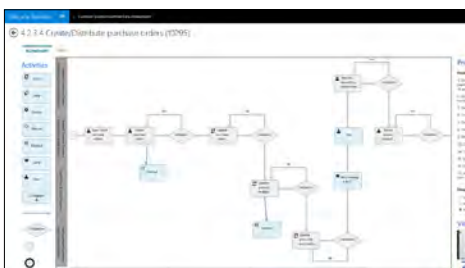
Lifecycle Services enables predictable and repeatable best practice implementations across the business.

Additional resources

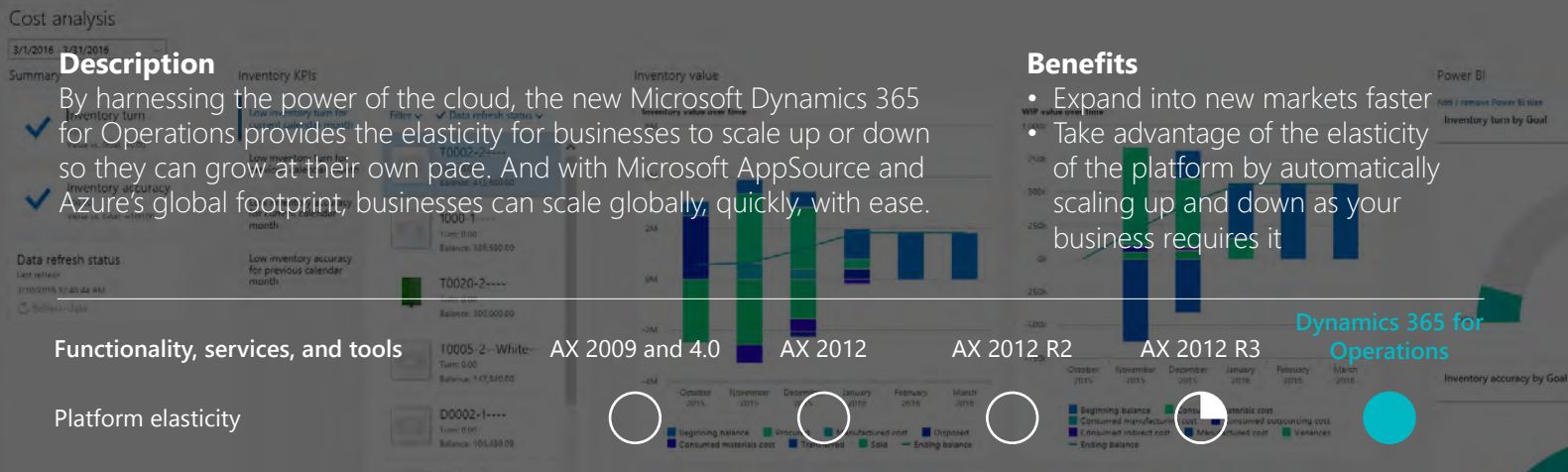
To learn more about predictable implementations, please visit the Lifecycle Services website.

[Lifecycle Services](#)

Screenshots



Platform elasticity



Details

- Elastic IT:** Utilize the power of Elastic IT to scale up or scale down infrastructure on a global system of data centers to almost any size to meet the needs of any business.
- Going global:** Utilize the experience, global footprint, security, and reliability that every enterprise should demand of cloud solutions to extend your IT operations.
- Flexible pricing:** Scale systems up or down as needed through the Azure Management Portal while only paying for the resources that are actually used.
- AppSource:** Microsoft AppSource is a place to feature apps that work with Microsoft Dynamics 365, helping you achieve predictable and high-quality implementation outcomes and reduced implementation cycles.

Summary

Dynamics 365 for Operations + Cloud = Flexibility

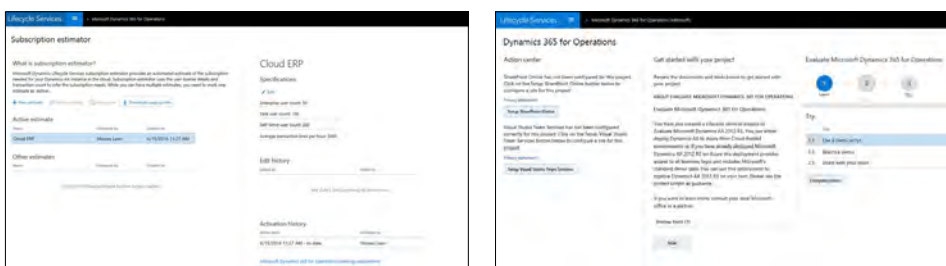
By harnessing the power and elasticity of the cloud, Dynamics 365 for Operations is more flexible than ever.

Additional resources

To learn more about Dynamics 365 for Operations, please visit our website.

[Dynamics 365 Enterprise](#)

Screenshots



Out of the box HA/DR



Description

The new release brings with it the benefits of the cloud that are most important for business — from simple sign-up, immediate provisioning, built-in high availability and disaster recovery, as well as elastic capacity to easily scale to meet the needs of your business. All included with the Dynamics 365 for Operations subscription!

Downloadable tools

Resources for repeatable and predictable implementations.

Functionality, services, and tools

HA/DR

Benefits

- Works out-of-the-box; no additional setup required
- Meets HA/DR requirements of modern businesses

AX 2009 and 4.0

AX 2012

AX 2012 R2

AX 2012 R3

Dynamics 365 for Operations

Details

- **High availability:** Out-of-the-box high availability that helps support the requirements of modern businesses.
- **Disaster recovery:** Your data is safe with integrated disaster recovery that protects your data, supports the business, and gives you the peace of mind that you need to run your business.

Summary

High availability, disaster recovery. Out of the box. High availability and disaster recovery are now available out of the box through Cloud Services.

Additional resources

Learn more about Cloud Services

Cloud Services

Mobile-ready



Channel deployment

Description

The new Microsoft Dynamics 365 for Operations is mobile-ready. Users can now access their Dynamics 365 for Operations accounts and Power BI reports on mobile devices, as well as leverage innovations such as mobile and cloud POS.

Benefits

- Extending ERP to mobile users increases mobile-user productivity by 17%
- Flexibility to access data anytime, anywhere

Functionality, services, and tools

Mobile-ready and access anywhere

AX 2009 and 4.0 ABI AX 2012

AX 2012 R2

AX 2012 R3

Dynamics 365 for Operations

Details

- **Mobile solutions:** Connected mobile solutions allow access to the same line-of-business applications employees rely upon in the office while they're away.
- **Modern app framework:** Connect modern apps easily and securely from outside the organization's firewall with Microsoft Dynamics 365 for Operations.
- **Employee and manager workspaces:** Submit timesheets and expense reports, and approve them from various mobile devices while out of the office and on the road.

Summary

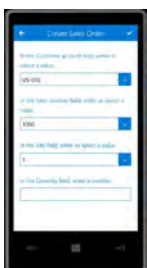
Anytime, anywhere. Mobile-ready. Build mobile-ready, Dynamics 365 for Operations customizers can access their accounts and tools anytime, anywhere.

Additional resources

To learn more, please visit our website.

Microsoft Dynamics 365

Screenshots



Integration with productivity tools



Description

The new Microsoft Dynamics 365 for Operations brings enhanced integration with productivity tools that users love, including Power BI and Office 365. Now users can streamline updates by working directly in Excel and dive into their data with custom dashboards built in Power BI.

Functionality, services, and tools

Integration with productivity tools

Benefits

- Increased collaboration and productivity
- Easy batch updates, forecast options, and more via Excel
- Use familiar tools that look and work like Office 365

Details

- **Microsoft Office add-ins:** Office add-ins offer information workers access to ERP data from productivity tools they use every day. Office add-ins provide interoperability with Microsoft Excel, Microsoft Word, and Microsoft Outlook for Office, as well as Office 365.
- **Edit in Excel:** Dynamics 365 for Operations users can now edit and sync their data with Excel, making it easier than ever to perform tasks such as making bulk updates to product information.
- **Budgets and demand forecasting:** Workers can use Microsoft Excel to update their budgets and demand forecasts, helping them increase efficiency and productivity by accelerating the process of updating directly from a spreadsheet.
- **Better business insights:** Visualize, analyze, forecast, and ask questions of your data using the broad self-service BI capabilities in Excel and Power BI for Office 365.

Summary

+integrations + productivity
Improved integration with productivity tools - including Power BI, Visual Studio, and Excel, help users get more done.

Additional resources

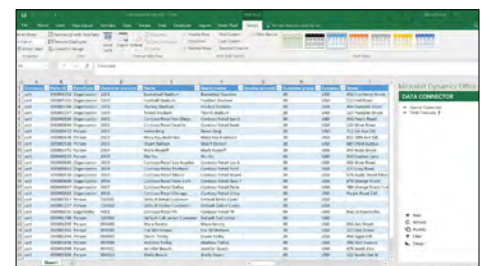
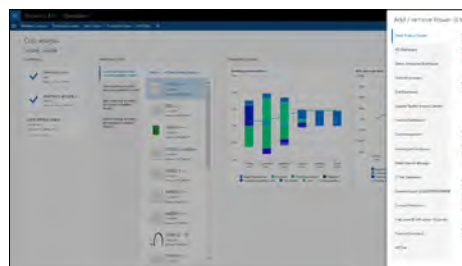
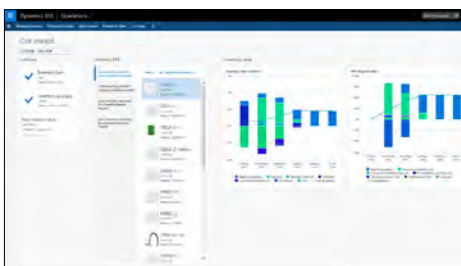
Learn more about the Dynamics 365 for Operations Azure Marketplace.

[Azure Marketplace](#)

Learn more about Power BI.

[Power BI](#)

Screenshots



Reduce customization



Description

Customers running previous versions* of Dynamics 365 for Operations can now take advantage of new standard functionality that could reduce customizations. Many common customizations are now available as new standard functionality. This decrease set up time and allows teams to spend less time coding and more time enjoying the benefits.

Functionality, services, and tools

Reduce customizations (up to 40%) due to added functionality

AX 2009 and 4.0 AX 2012 AX 2012 R2 AX 2012 R3 **Dynamics 365 for Operations**

Benefits

- Reduces customization by taking advantage of the standard functionality
- Faster implementations and faster time-to-value
- Reduces labor investment

Details

- New standard functionality:** Dynamics 365 for Operations allows users to reduce customization by taking advantage of new standard functionality.
- Modern Store and Mobile Commerce Client:** Empowering Store users through mPOS, clienteling POS, and Store Management client. Cloud POS enables rapid deployment.
- Omni-channel commerce:** Optimized for rapid TTV for businesses engaging in omni-channel commerce across HQ and channels.
- Budget plans and forecasts enhancements:** Due to the new enhancements, users can now have the flexibility to create and edit budget plans by using both Excel and the Dynamics 365 for Operations client.
- Demand forecasting (Microsoft Excel Integration):** Now users can use Microsoft Excel to update demand forecasts, and help increase efficiency and productivity by accelerating the process of updating directly from a spreadsheet.
- Delivery alternatives page:** This new experience can help organizations that aspire to provide high customer service while committing to an inventory optimization strategy. Users can now promise orders reliably and competitively.

Summary

Less customization, less headache
Leverage the new standard functionality and reduce your customizations.

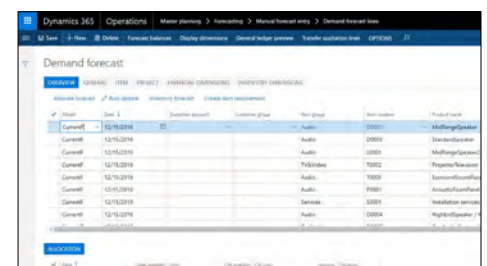
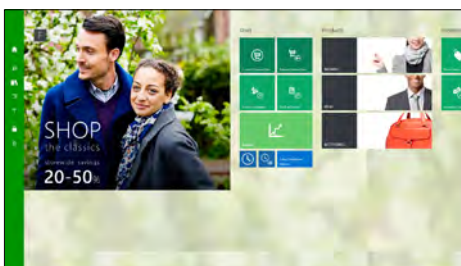
Additional resources

To learn more about new added industry functionality, please visit the What's new document.

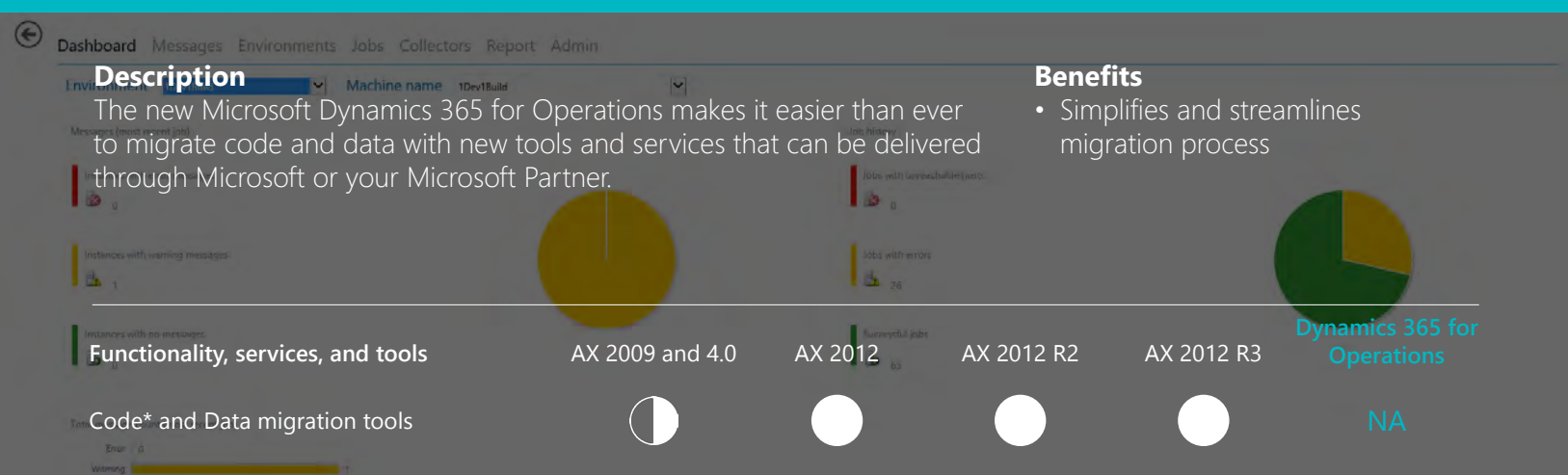
[What's new?](#)

**Customization reduction varies depending on the deployed version. AX 2012 R3 has the same industry functionality as the new Dynamics 365 for Operations.*

Screenshots



Migration tools



Details

- Code upgrade and upgrade analysis tool:** The code upgrade tool is an LCS service that will assist you in evaluating the effort for upgrade before making the commitment, will automatically migrate your code to the current version, and also streamline the process by providing automated merging and documenting where manual merging needs to be performed.
- Data migration:** Data migration give you the ability to migrate from legacy AX versions - starting with AX 4.0 and AX 2009 - without doing a full upgrade. This includes configuration and setup, balances, open documents and pending invoices, system configuration, and anything else that has an entity.

Summary

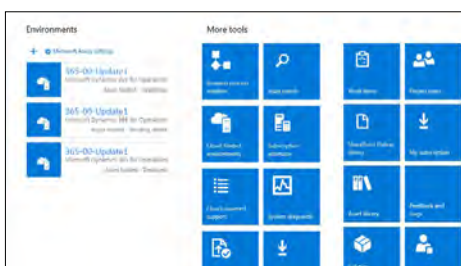
Migration made easy
Leverage new code and data migration tools.

Need more reasons to Upgrade?

To learn more about our upgrade services, please visit our website.

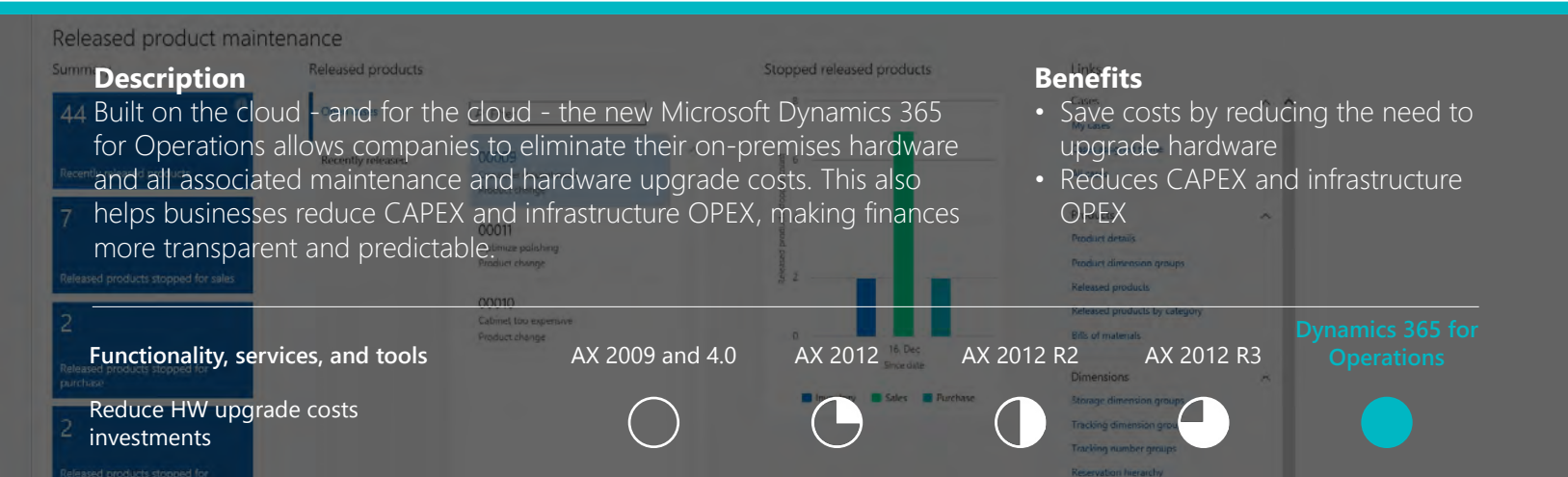
[Reasons to Upgrade](#)

Screenshots



* Code update only available for AX2012 deployments

Reduce hardware costs



Details

- **Move to the cloud:** By moving to the cloud, organizations can get the benefit of a subscription based model. All the infrastructure runs off-premises and organizations can reduce many costs associated with owning hardware, including upgrade and management costs.
- **Reduce CAPEX and infrastructure OPEX:** By moving the cloud, organizations could reduce CAPEX and infrastructure OPEX, and enjoy the simplicity and transparency of a flexible SaSS-based subscription plan.
- **Stay secure:** With cyber risks continuing to evolve, Microsoft Azure provides world-class cyber security.

Summary

Dynamics 365 for Operations + Cloud = No more hardware upgrade costs
Move to the cloud and reduce your hardware upgrade cost investments.

Not ready for the Cloud?

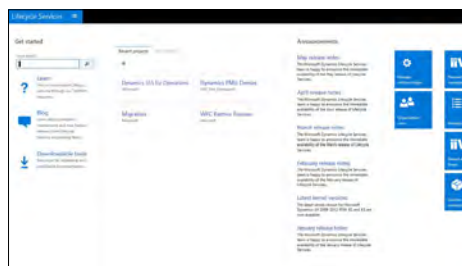
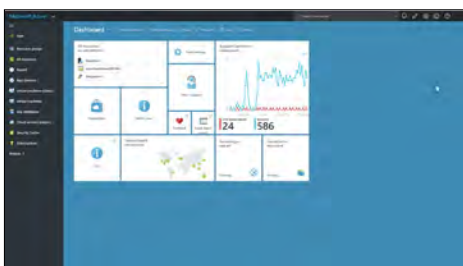
On Premise Requirements

Contact Clients First for sizing or upgrade assistance:

800.331.8382

info@cfbs-us.com

Screenshots





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