

Microsoft Dynamics 365 for Operations

A resource guide for customers



Welcome to the next generation of intelligent business applications

Microsoft Dynamics 365 for Operations is Microsoft's cloud ERP business app, built on and for the Microsoft Azure cloud. It provides organizations with a service that can support their unique requirements and rapidly adjust to constantly changing business environments, without the hassle of managing infrastructure.

The purpose of this guide is to provide customers with fingertip access to tools and resources that will ensure a smooth transition to Dynamics 365 for Operations, including those that are migrating from or are deploying Microsoft Dynamics AX. It includes links to a full range of self-help, assisted, community and peer support that is designed to help you implement, administer, navigate, and use Dynamics 365 for Operations at optimum efficiency.



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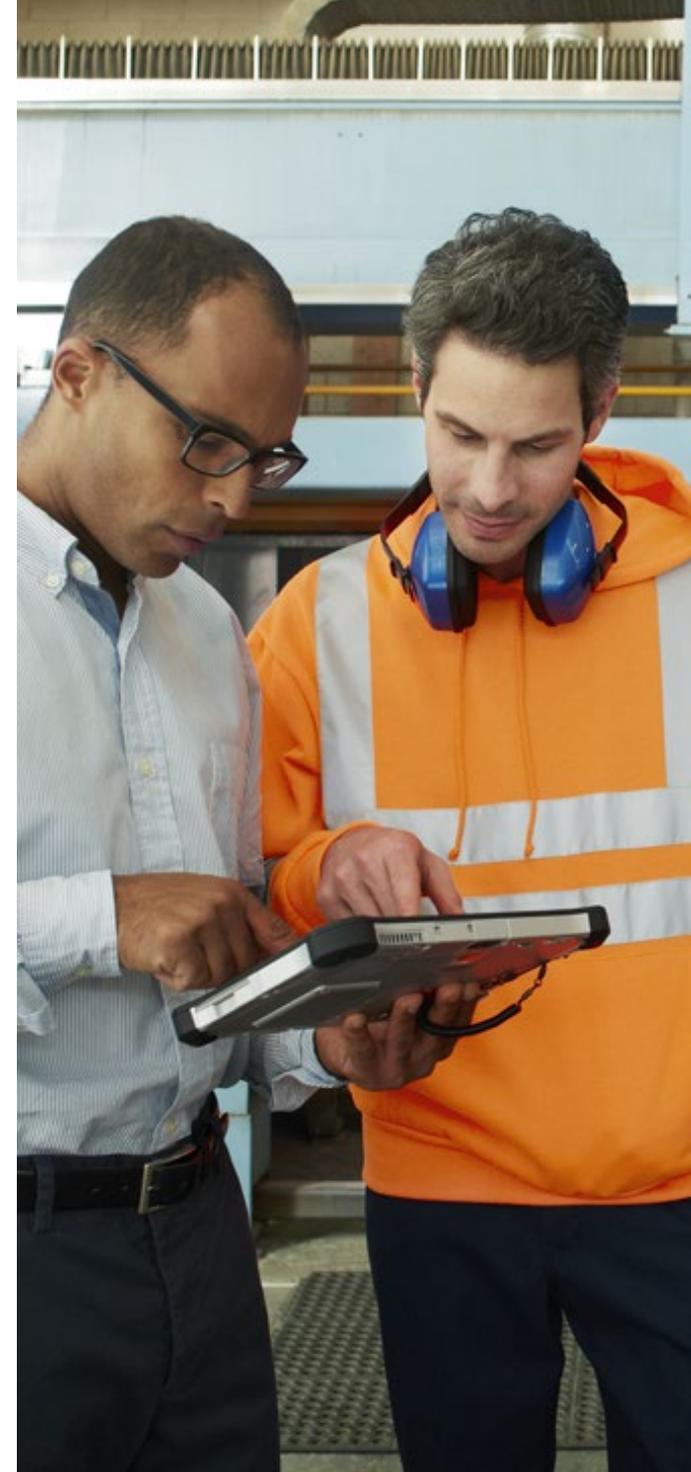
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Dynamics 365 for Operations



Get started

Functional and system overview

Start by learning about the [new features](#) in the latest version of Dynamics 365 for Operations. Then, discover all the [BI and reporting resources](#) that are available.

Looking for insights into a specific functional area? Try exploring these subjects:

- [Country/region functionality](#) for 15 countries, from Australia to the USA
- Learn about [financial management](#) functionality including accounts payable, receivable, general ledger, cash/bank management and more
- [Human resources](#) streamlines many routine recordkeeping tasks and automates a number of processes related to staffing your organization
- From electronic signatures to number sequences, address books to workflow, you'll find helpful links on [organization administration](#)
- Whether you're identifying a need for a product or service or procuring/ processing a payment, you'll find the answers at [procurement and sourcing](#)
- Learn more about the [project contracts](#) you can create for various types of projects and funding sources
- The Sales functionality within the [Sales and Marketing](#) module allows you to manage sales orders, pricing management, sales quotations, promotions, sales commissions, partner and alliance commissions, and sales returns
- Whether you need help with cost management, planning and scheduling, manufacturing or distribution and warehousing, [supply chain management](#) can help
- Work in manufacturing? This [Fact sheet](#) can help

On [AppSource](#) you'll find dozens of applications developed by Microsoft and our partners, that help you do even more. Check back regularly as new apps are constantly being added.



Get started

User interface

These [resources](#) can help you navigate, personalize, and use Dynamics 365 for Operations more efficiently:

- [Personalize](#) the user experience
- [Configure and filter](#) workspaces
- Use the search functionality to [navigate to pages](#)
- [Action search](#) will help you find and run actions on a page
- [Keyboard shortcuts](#)

Configure your Help system

Dynamics 365 for Operations includes a Help system that is based on two main components that can be accessed from the Help pane: The wiki and task guides.

The [Help wiki](#) is the primary source of product documentation.

A [task guide](#) is a controlled, guided, interactive experience that leads you through the steps of a task, or business process and can be configured for your specific needs. To start,

- Display pages [side-by-side](#) using the Open in New Window icon
- Discover [filtering and query options](#) available when you use the “matches” operator in the Advanced filter/sort dialog
- [Answers](#) to frequently asked questions
- What's new in the [Dynamics AX user experience](#)

[download the Help system fact sheet](#). It provides an overview of the help system.

The [Troubleshooting Guide](#) helps you locate the most relevant information for the problem you're trying to solve. For more information, click on:

- Help [architecture](#)
- [Connecting](#) the help system
- Creating [custom help](#)
- How to [view and export field descriptions](#)



Deployment resources

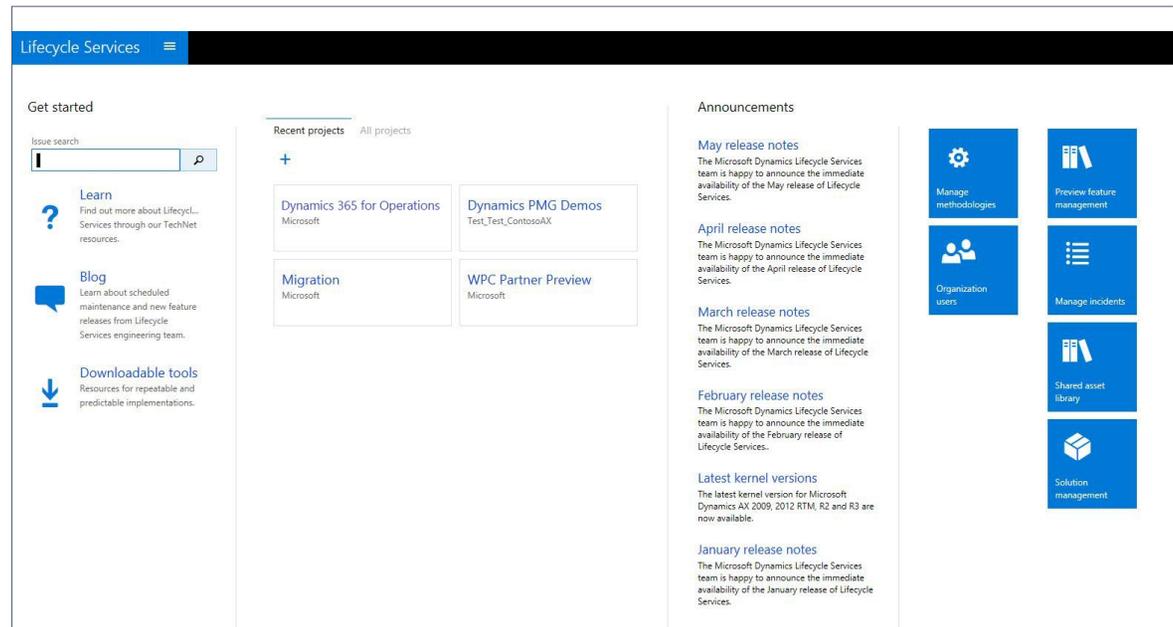
Lifecycle Services and user guide

Microsoft Dynamics Lifecycle Services (LCS) helps organizations improve the predictability and quality of their Microsoft Dynamics 365 for Operations implementations by simplifying and standardizing the deployment process to deliver the right information, at the right time, to the right people and to help ensure repeatable, predictable success with each roll out of an implementation, update or upgrade.

LCS is available to both customers and partners as part of their support plans.

The [LCS User Guide](#) includes tools like business process modeler, configuration and data manager, RFP responses and more. To see the current health status of your platform and services, visit the Environments section of your LCS project.

If you're a Microsoft Dynamics AX 2012 customer, you can [sign in](#) by using your CustomerSource or PartnerSource credentials. If you're a customer of the newest version of Dynamics 365 for Operations, you can sign in by using your Microsoft Azure Active Directory (Azure AD) credentials.



Lifecycle Services help customers map out their implementation process — whether deploying an update, or an upgrade

Support resources

Dynamics 365 for Operations includes the support plan you've already selected. To review or compare your plan benefits to other support plans, [download the PDF](#).

Discover the [Support setup requirements](#) in Dynamics AX, Microsoft Visual Studio Online, and Microsoft Dynamics Lifecycle Services — and how to create and work with support issues.

There are additional ways to learn how to accelerate your workflow with Dynamics 365 for Operations:

- Ask the [community](#)
- Open a [support ticket](#) with the Ops team
- Discover a host of [training materials and e-Learning](#) resources, applicable to versions of Dynamics AX and Dynamics 365 for Operations

Microsoft Dynamics 365 Support Plans				
Level	Subscription	Enhanced	Professional Direct	Premier
Self-Select Your Plan	A small business with standard, non-business-critical support requirements and full partner support	A small size business needing more rapid response times	A mid-sized business with enterprise-level needs, including technical account management	An enterprise business with complex support needs and business-critical application support requirements
Community Forums	x	x	x	x
Service Dashboard	x	x	x	x
Web and Phone Incident Submission	x	x	x	x
Access to Self-Help Portals	x	x	x	x
Unlimited Break/Fix Incidents	x	x	x	x
Support	Local business hours	Local business hours	24x7 for Severity A cases	24x7 for Severity A cases
24x7 Support			Severity A cases	Severity A cases
Lifecycle Services	x	x	x	x
Unlimited Online Training	x	x	x	x
Technical Account Manager			Pooled	Assigned
Priority Handling			x	x
Escalation Phone Line			x	x
Ask the Expert Webinars			x	x
Advisory Support			Limited	Full
Monthly Reviews			x	x
Proactive Services			Limited	x
Cloud Service Dependency Mapping				x
Major Incident Response Planning				x
Remote Diagnostics & Reporting				x
Mentoring				x
Onsite Services				x

Microsoft provides this material solely for informational purposes and not as an offer. Customers who have questions about this material or their agreements should contact their reseller or Microsoft account manager. Eligibility for Microsoft Dynamics 365 Support plan benefits varies by offering and region and is subject to change. For those customers who purchased Microsoft 365 Support, review the Terms of Use for the Microsoft Cloud Services Portal [here](#). For Volume Licensing Customers, consult product use rights [here](#).

Review all your support plan options to ensure you have the right support for your changing business





Microsoft Dynamics AX

Support resources

There are plenty of ways to get help with Dynamics AX — whether it's with deployment, configuration or use.

Start by reading about [system requirements](#), [installation](#), or [system setup](#).

Additionally, you can:

- Read [fact sheets](#)
- Find [documentation](#)
- Take advantage of [How-to articles](#)
- Self-paced [e-Learning modules](#)
- Watch [How-to videos](#)
- Search the [Knowledgebase](#)
- Gain [access](#) to Hotfixes, Service Packs, Support News and more

Lifecycle Services

[Lifecycle Services](#) provides cloud-based application lifecycle management for AX 2012 implementations. Use the tools to manage projects, model business processes, evaluate costs for licenses, use cloud-based deployments, improve code quality, simplify upgrades, proactively monitor your environments, log support cases, and quickly find and install updates.



Deployment resources

IT implementation and administration

IT administrators who support Microsoft Dynamics AX must support a deep technology platform, and a broad range of functionality. Use the following links to gain a deeper understanding of the administrative tasks for AX 2012:

- Planning
 - [New and changed features](#)
 - [System requirements](#)
 - [Architecture](#)
 - [Implementation guide](#)
- Deployment
 - [Install on premise](#)
 - [Deploy on Azure](#)
 - [Upgrade](#)
 - [Apply updates and hotfixes](#)
- Data
 - [Data partitions](#)
 - [Data import and export](#)
 - [Master data management](#)
 - [Database management](#)
- Business intelligence
 - [Financial statements](#)
 - [Reporting](#)
 - [Analytics](#)
- Web components
 - [Enterprise portal and role centers](#)
 - [Enterprise search](#)
 - [Help system](#)
- Frameworks
 - [Company and organizational framework](#)
 - [Security](#)
 - [Workflow](#)
 - [Services and AIF](#)

Plus there are plenty of [printable guides](#) and [white papers](#) for system administrators.

Customization and development

Microsoft Dynamics AX is fully customizable. The primary content source is the [AX 2012 Developer Library on MSDN](#).

Newest features and migration help

To see if you're ready to make the move to Microsoft Dynamics 365 for Operations, use our [Self-Assessment Tool](#), or read about [what's new](#).





Community-based and peer-to-peer resources

Community-based resources

In addition to our online resources, there are face-to-face community resources that connect you with tens of thousands of Microsoft Dynamics customers and partners who are eager to swap stories, share ideas and help solve challenges. These communities are a fun and inspiring way to get to know other Microsoft users.

- [Microsoft Dynamics AX Community](#)
- [Microsoft Dynamics 365 Enterprise Edition Community](#)
- [Dynamics AX User Group \(AXUG\)](#)
- Find answers fast in the [Dybanics AX Forum](#) or [Dynamics 365 Enterprise Edition Forum](#)

Connect on social media:

There are lots of ways to engage with Microsoft Dynamics 365 for Operations through social media. Follow us to stay up-to-date on the latest news or participate in discussions.



We're always looking for ways to improve this guide and increase access to resources. If you'd like to share feedback on how we can improve this guide in the future, please email us at dynccp@microsoft.com.

