



Retail Channel Management and Corporate Operations

Microsoft Dynamics® AX 2012 R3



Junction Solutions

Atlanta | Denver | San Francisco | St. Louis | Toronto



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Course Details

This 2-day instructor-led training provides students with the necessary tools and resources to learn about the features and functionality that are completed in the Microsoft Dynamics AX rich client and are typically done by corporate or headquarters personnel. This course is the starting point for implementing a new retail channel whether it be a retail store, online store, or call center.

Audience

The intended audience includes partners and customers who want to learn the basic features and develop a working knowledge of the typical daily procedures required to use Microsoft Dynamics AX 2012 R3 CU8 Retail functionality.

It is targeted for corporate and IT personnel that are responsible for the setup and administration of the Retail Application Functionality.

At Course Completion

Attendees will understand the setup and operations of the Microsoft Dynamics AX for retail rich client typically done by corporate or headquarters.

Electronic copies of certificates are given out automatically upon completion of a course. If for some reason you don't receive a certificate or have special circumstances (multiple participants, physical certificates, etc.), feel free to contact us at jstraining@junctionsolutions.com.



Course Cancellation Policy

Junction Solutions reserves the right to cancel courses up to 7 days prior to class commencement due to low enrollment. In the event of a cancellation, Junction Solutions will contact any enrolled students.

Travel and Expense Policy

Travel Expenses which will be billed at a later date. If the client would like the trainer to follow a specific travel policy attach it upon execution of the statement of work.

Payment

All work performed shall be performed on a fixed fee basis. This is in accordance with the after sales service agreement of the original statement of work for the purchase and installation of Microsoft Dynamics AX. Junction Solutions will bill the Client upon execution of the statement of work. Payments must be made before the beginning of the training and additional expenses will be billed after the conclusion of training.

Refund Policy: Any cancellations 14 days prior to the scheduled course will be provided a 100% refund. Cancellations 7 days prior to the scheduled course will be provided with a 50% refund. Cancellations within 7 days of course commencement will not be refunded.

Prerequisites

Students

Students attending this section of the course should have a basic understanding of:

- General knowledge of Microsoft® Windows®
- Basic knowledge of Dynamics AX 2012 navigation

Environment

Before the beginning of the first lesson the following materials and equipment will be required:

- A LCD Projector*
- Projection screen/surface
- A white board or
- Flip chart stand/paper (optional)

Each attendee will need a Laptop/PC with the following available:

- Internet connection
- A VPN connection to Junction Solution (The connection information will be provided by the trainer upon the first day of training).

Junction Solutions Training Academy hosts the training images on a local server in our Denver offices. The VPN connection is required for the participants to connect to the Hyper-V training image.

* The instructor can provide a projector if one is not available upon request only.



Course Outline

Chapter 1: Basic Architecture and Navigation

This chapter introduces the user interface of Microsoft Dynamics AX 2012. The main window of the program is discussed in addition to instructions on how to navigate in the system.

Lessons

- Describe the user interface elements in Microsoft Dynamics AX 2012.
- Review how to search, insert, and delete records.
- Describe how to modify form set up.
- Create and organize favorites.

Chapter 2: Organization

In this chapter we will discuss the use of organizations and hierarchies and explain why modeling your organization is an important process for retailers.

Lessons

- Describe the features of organization modeling.
- Explain why organization modeling is important.
- Discuss terminology and concepts used with organization modeling.
- Create an organization and configure a hierarchy.
- Describe the hierarchy purposes and how they are used throughout the system.

Chapter 3: Retail Channel

In this chapter we will take a look at creating each type of retail channel. Retail channels are the core setup that controls the flow and function of a given channel in AX.

Lessons

- Describe the use and purpose of each type of retail channel available in AX.
- Explain the relationship of a retail channel to the organization hierarchy.
- Create a new retail channel for brick and mortar stores.
- Create a new retail channel for online stores.
- Create a new retail channel for call centers.

Exercises

Create a retail store

Chapter 4: Store Locator

In this chapter we will look at using store locator groups to logically group stores together for reporting and inquiry purposes.

Lessons

- Describe the use and purpose of store locators.
- Create a new store locator group.
- Assign retail channels to a store locator.

Exercises

Create a store locator group.



Chapter 5: Info Codes

This chapter explains Info Codes and how they are used to capture information at the POS register.

Lessons

- Explain the use and function of info codes.
- Describe a few examples of info codes.
- Create new info codes and sub codes.
- Translate info codes.
- Group info codes.

Exercises

Create an info code.

Chapter 6: Retail Parameters

In this chapter, we will review the setup of various parameters required for retail setup in AX. There are three parameter forms in AX for retail, one that is company specific parameters, one that is for parameters that are shared across legal entities, and one for configuring the retail scheduler which is responsible for publishing data to and from the AX database and the channel databases.

Lessons

- Review and setup the retail parameters.
- Review and setup the scheduler parameters.
- Review and setup shared retail parameters.

Exercises

Verify retail schedule parameters.

Chapter 7: Sales Tax

In this chapter we are going to review the sales tax setup at a high level focusing primarily on sales tax setup and features that are specific to retail.

Lessons

- Describe the sales tax components and concepts in AX.
- Set up sales tax.
- Configure sales tax settings on retail channels.
- Describe inclusive and exclusive tax.
- Set up sales tax overrides.
- Configure destination based taxes.

Exercises

Set up sales tax for a retail store.



Chapter 8: Payment Management

This chapter introduces the features & set up of payment methods, Creation of card type, Set up of Channel or Store Payment Method, and the set up of the payment services.

Lessons

- Describe the payment methods available.
- Set up new payment methods.
- Explain credit card process.
- Complete additional setup for credit card payment types.
- Link payment methods to a retail channel.

Exercises

Set up payment methods.

Chapter 9: Retail POS Setup

In this chapter we will review the basic point of sale setup, which includes review of the POS setup, review of the POS profiles, receipt formats and hardware profiles.

Lessons

- Review the concepts of budgeting.
- Set up basic budgeting.
- Discuss the uses of budget control.
- Discuss the used of budget planning.

Exercises

Create a new visual profile.

Chapter 10: Retail POS Design

This chapter will look at designing the layout of the POS including the enterprise and modern POS. This is a very important step in the configuration process as it controls how the user interface will function for your store personnel.

Lessons

- Describe the elements of a good POS design.
- Describe and create new POS registers.
- Discuss the creation of devices.
- Describe the functionality of a screen layout.
- Review an example of a modern POS and enterprise POS.
- Create a new screen layout, button grids, add images, and configure keyboard mappings.

Exercises

Create Registers and devices.
Create a new retail POS design.



Chapters 11: Retail Workers and Security

This chapter will review the following setups for a retail worker which provides access to the store staff at the POS register. We will also take a look at the Retail worker overview, POS permissions, jobs, position, and worker setup.

Lessons

- Set up a worker.
- Describe operations.
- Create a permission group.
- Create jobs, positions, and assign a worker to the job.
- Override permissions on a worker.
- Configure the global address book for store-worker assignments.
- Review the security available for retail.

Exercises

Managing positions, roles, and workers for a retail store.

Chapters 12: Loyalty Management

A loyalty program can help increase customer loyalty by rewarding customers for buying products in your retail stores. In Microsoft Dynamics AX 2012 R3, you can set up simple or complex loyalty programs that apply across your legal entities in any retail channel.

Lessons

- Describe the prerequisites for loyalty management.
- Set up date intervals.
- Set up reward points.
- Configure a loyalty program.
- Define loyalty tiers and tier rules.
- Create loyalty schemes.
- Set up loyalty cards.
- Process and view loyalty transactions.

Exercises

Create a new loyalty schema.
Issue a loyalty card and adjust loyalty rewards.
Assign price groups to loyalty program tiers.

Chapter 13: Gift Cards

In this chapter we will discuss the process for configuring gift cards to be sold and used as a method of payment. With AX 2012 R3 you can purchase and redeem gift cards in any channel. Support for electronic email gift cards is also included with the call center and online stores. Gift cards can help to enhance your sales and revenues by offering your customers more options to stay loyal to your business. They also provide a variety of benefits for your customers such as time savings and convenience.

Lessons

- Describe the features of gift cards.
- Set up gift cards.
- Void a gift card.
- Add an amount to a gift card.
- View gift card transactions.
- Unlock a gift card

Exercises

Sell a gift card.

Chapter 14: Retail Periodic

In this chapter we will review each of the periodic processes that are typically completed by the corporate and operations personnel.

Lessons

- Describe the flow for online store transactions.
- Synchronize online orders to AX.
- Send email receipts and notifications.
- Redeploy the POS.
- Describe the data distribution process.
- Run a data distribution job.
- Describe the statuses for data distribution jobs.

Exercises

Perform an Online Store Transactions (OST).
Create and send an email receipt.

Chapter 15: Retail Inquiries

The retail module includes a variety of inquiry forms that you can use to view and drill down into the details of various types of transactions that are posted and created with the retail features. In this chapter we will review those inquiry forms and how you can use them to find the information you are looking for.

Lessons

- View retail channel transactions.
- View sales by channel and products.
- View shifts with their transactions and print a Z-report.
- View the status of the Commerce Data Exchange services.



Chapters 16: Journals

This chapter describes how to create, calculate, and post statements. This is a necessary process in AX that is used to reconcile and generate the general ledger entries related to the transactions that have occurred in the POS.

Lessons

- Review Open Statements.
- View Posted Statements.
- Batch Process for Statements.

Chapter 17: Reports

The standard reports that are included with Microsoft Dynamics AX can be used in Retail. However, Retail also provides additional inquiry capabilities and reporting options. Both inquiries and reports provide filtering and sorting. Therefore, you can quickly view the information that you want.

Lessons

- Retail Reports.
- Channel Reports Configuration.
- Retail Store Metrics.
- Gross Margin Return on Inventory Investment Reports.
- Performance by Terminal.
- Top 10 OU Performs in Current Year.
- Sales Comparison Year Over Year by Operating Unit.
- Retail Analytics with Built in Cubes and Excel.
- Power View Reports.
- Printing Transactions.

Agenda

	Day 1	Day 2
9:00 AM	Introductions and Basic Navigation Organization	Retail Worker and Security
10:00 AM	Retail Channels /Store Locator	Loyalty Management
11:00 AM	Info Codes / Retail Parameters	Gift Cards
12:00 PM	LUNCH	LUNCH
1:00 PM	Sales Tax/Payment Management	Journals / Reports
2:00 PM	Retail POS Setup	Retail Periodic / Retail Inquiries
3:00 PM		
4:00 PM	Retail POS Design	Course Review
5:00 PM	SESSION END	SESSION END