



Welcome to Microsoft Dynamics AX

Tempur-Sealy is a world-class organization that invests in training that sets employees up for success – from the first day of hiring all the way throughout their career. Microsoft Dynamics AX training is designed to build on this commitment with hands-on experience with the AX platform. It will empower our team members to provide exceptional service.

▶ OBJECTIVES:

- ▶ Learn the features and benefits associated with the Microsoft AX platform
- ▶ Understand how our use of AX is critical to bringing us all together
- ▶ Understand the basics of the terminology and lingo used throughout AX
- ▶ Learn more about the basic navigation of AX:
 - What's on the home screen
 - How to open forms
 - How to use ribbons
 - How to use FastTabs
 - How to search grids

▶ TRAINING TOOLS:

This leaders guide provides the option of utilizing AX live for practicing the technology while in-session with PRACTICE exercises; it can also be delivered utilizing just the Workbook. Included in this training is an optional section. To deliver this module effectively, ensure that you have the following tools:

- ▶ Workbook (one per trainee)
- ▶ Menu Items baggies (one per two or three attendees)
(printable handout included at end of guide)
- ▶ If using AX, ensure all computers are operational and ready for log in
- ▶ PowerPoint
- ▶ Terminology Handout
- ▶ Clicker with pointer to highlight screen shots
- ▶ Prior to your training session, identify which login method your audience will use.
Discuss as appropriate during the Logging In section.

▶ TRAINING GUIDE STRUCTURE:**EXERCISE**

Exercises are highlighted in a yellow box. Some exercises and sections are optional; these are shown in a gray box to indicate they may be omitted.

**ASK**

Questions are used throughout to engage dialogue. When you ask a question, wait for responses.

**SHOW**

Use the accompanying PowerPoint to enhance learning.

**INSTRUCT**

Follow the script as closely as possible to ensure all material is covered.

**PRACTICE**

Practice activities help engage attendees to try out new skills. If teaching from the Workbook only (not in front of a computer), these can be skipped.

**WORKBOOK**

Instruct attendees to open their Workbooks to the correct page to follow along or do an activity.

**DEMO**

When you see the demo icon, switch to the AX system to demonstrate.

**CLICK**

When you see the mouse icon, it means there is further information on the slide. Wait until you reach that point in the guide to click forward in the PowerPoint.

▶ PRE-TRAINING ASSIGNMENT:

One week prior to training, send trainees a link to the Microsoft Dynamics AX general information on the Microsoft site. Have them review and be prepared to share a minimum of three insights about the benefits of this platform during the training.

Introduction

NOTE TO LEADER: BEFORE BEGINNING, MAKE PERSONAL/PROFESSIONAL INTRODUCTION.

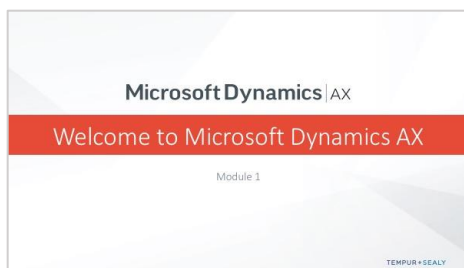
CORONAVIRUS SAFETY SET UP-

MASKS UNLESS YOU ARE AT YOUR DESK, CLEANING IN BETWEEN SESSIONS

THINGS LOOK A LITTLE DIFFERENT...NO GROUP EXERCISES

SET EXPECTATIONS FOR INTERACTION, WE NEED PARTICIPATION TO ENSURE YOU GET THE MOST BANG FOR YOUR BUCK OUT OF THIS SESSION. ADULT LEARNING - SEE IT/SAY IT/DO IT.

THIS SESSION IS FOUNDATIONAL...NO NEED FOR LAPTOP, MORE INFORMING, SET YOU UP FOR SUCCESS



INSTRUCT:

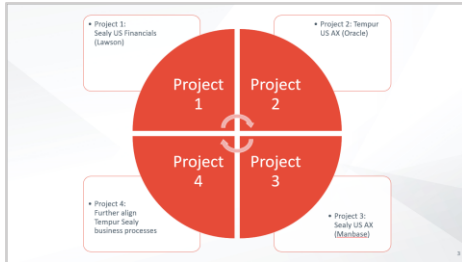
Microsoft Dynamics AX is an enterprise resource planning system – also known as an ERP.



INSTRUCT:

An ERP is a business management software that allows an organization to manage and integrate a company's customer service operations, financials, supply chain, reporting, manufacturing, and human resource activities.

In your pre-training assignment, we asked you to do some research on our topic for today: Microsoft AX. Before we discuss your findings, let's revisit the ERP projects in-motion for TSI.



INSTRUCT:

As you've likely heard, we have several projects on the roadmap to get to our end-goal of "one company, one invoice". Project 1 (Sealy Financials) went live in Q2 of 2020. Project 2 is Tempur US, replacement of Oracle. That's why we're here today...we go live in January! Project 3 is Sealy US, replacement of Manbase – this project is well underway! Launch date TBD. And Project 4 is further alignment of Tempur Sealy processes once we are all using AX – one company, one invoice. So, we have come a long way and we still have a long way to go. However, we are making great progress on the path to that goal! Now, let's dive in.

(OPTIONAL SECTION: FOR LAUNCH ONLY WITH EXISTING EMPLOYEES)



**ASK: WE HAVE A LOT OF ERPS AT TSI...WHAT ARE THE BIG 3?
(MENTION SOME: ORACLE, MANBASE, AX (FOR FLAGSHIP AND COCOON)).**



INSTRUCT:

Right now, we use so many different systems and platforms to do the same thing. This means we can't capitalize on our strengths unless we bring everyone together. AX offers something for every line of business. It will not happen overnight BUT IT IS DEFINITELY HAPPENING! We will be phasing in AX starting right here and now!

Bringing AX to TSI was a major undertaking from an operational standpoint. It's not just "flipping a switch" – it's an enterprise-wide endeavor, and one that we know we're poised to capitalize on after other false starts.



**ASK: NOW, FROM YOUR PRE-WORK RESEARCH, WHAT DID YOU LEARN ABOUT AX?
WHAT ARE THE BENEFITS FOR OUR COMPANY & OUR CUSTOMERS?**



INSTRUCT:

One of the biggest benefits is that we can function as ONE Tempur-Sealy team as we deliver service to each other and to our external customers.

Today, we're going to look at how.



INSTRUCT:

We'll learn more about the features and benefits associated with AX...

We'll look at how our use of AX is critical to its use throughout TSI: how it brings us all together...

We'll look at some of the basic terminology and lingo used throughout AX...

And, we'll log in to AX and look at some of the basic navigation within the system.

Let's talk about the importance of your role and how AX is going to help us.

AX Bringing Us All Together



ASK: WHO IS THE ARCHITECT OF AX? (MICROSOFT)



WHAT ARE MICROSOFT'S STRENGTHS? (GLOBAL, PROVEN, PROGRESSIVE, INNOVATIVE, STRONG SERVICE REPUTATION...)



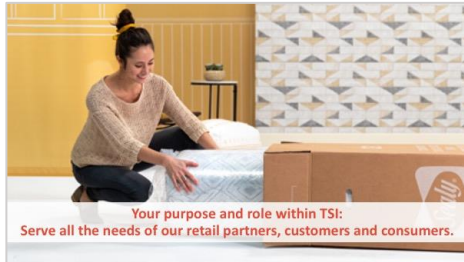
INSTRUCT:

As a Microsoft platform, we're given continued support and it assures reliable updates that keep us current with technology.

This allows us to deliver on our service mission. Now we know why AX/Microsoft is important...why are we so important? We are a critical component in every sale, and our use of AX assures stellar service.

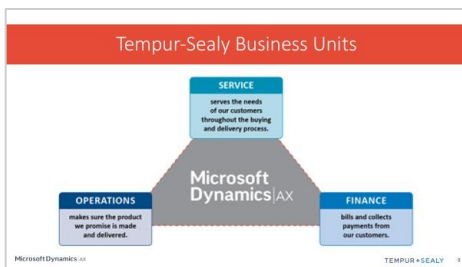


ASK: NOW WE KNOW WHY AX/MICROSOFT IS IMPORTANT...WHY ARE WE SO IMPORTANT? HOW DO YOU DESCRIBE YOUR PURPOSE AND ROLE WITHIN TSI?



INSTRUCT:

We are a critical component in every sale, and our use of AX assures stellar service. There isn't a mattress that gets delivered that isn't touched by what you do. Every product we create, ship and deliver in some way comes through us. Your service – and commitment to excellence – makes sure every step of the mattress journey is fulfilled: for our retail partners and our consumers.



ASK: HOW OFTEN DO THESE THREE BUSINESS UNITS WORK TOGETHER TO SERVE OUR CUSTOMERS? (CONSTANTLY)

Microsoft Dynamics AX offers functionality for inventory control, warehouse management, transportation management, demand and supply chain planning, material requirements planning, production management, quality assurance, product lifecycle management, asset management, and business intelligence. That's a lot! It gives us the insight we need into everything that makes our business run, and this allows us to serve our customers better. It will allow us to build better relationships across the board. Let's take a look at our different business units at TSI.

(OPTIONAL EXERCISE) THAT THING YOU DO!

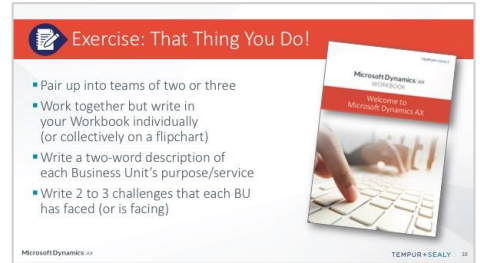
 10 minutes

 **WORKBOOK: PAGE 5** - Business Units at TSI

DIRECTIONS:

- ▶ Pair up into teams of two or three
- ▶ Work together but write in your Workbook individually (or collectively on a flipchart)
- ▶ Write a two-word description of each BU's purpose/service
- ▶ Write 2 challenges that BU has faced (or is facing)

 **DEBRIEF: HAVE TEAMS SHARE ANSWERS WITHOUT DUPLICATION. HOW WILL AX HELP WITH THE CHALLENGES?**



Exercise: That Thing You Do!

- Pair up into teams of two or three
- Work together but write in your Workbook individually (or collectively on a flipchart)
- Write a two-word description of each Business Unit's purpose/service
- Write 2 to 3 challenges that each BU has faced (or is facing)

Microsoft Dynamics AX
TEMPUR+SEALY




The AX Advantage

- Built for quick and easy access to customer info
- Visibility into key areas like tracking and entering orders

Microsoft Dynamics AX



INSTRUCT:

AX is a great tool for us because it is built for quick and easy access to vital customer information. It assures you have visibility into many key areas like tracking and entering orders.

OPTIONAL: IF ANY ATTENDEES ASK ABOUT DYNAMICS 365 (D365) VS AX, EXPLAIN THAT D365 IS A DIFFERENT (NEWER) VERSION OF AX. WE WILL LIKELY UPGRADE TO D365 EVENTUALLY, BUT THIS WILL NOT OCCUR IN THE NEAR FUTURE.

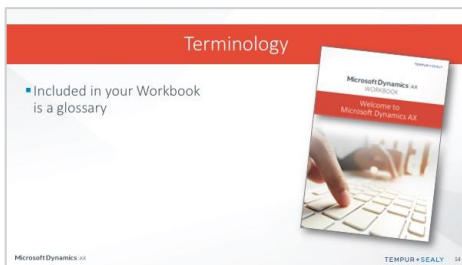
Now that you understand a little more about the basics of AX – what it does and why we're using it – let's look at some of the basics of using it.

AX Terminology



INSTRUCT:

Before we log in and begin looking at the AX screens, I want to talk for a minute about terminology. With anything you do in this world, there is a language – terms that you use. Some systems may call a customer a “contact” or “client” – there’s a lingo. AX is no different.



WORKBOOK: PAGES 6-10




INSTRUCT:

Included in your Workbook is a glossary of many of the terms used throughout AX. Anytime you’re using AX and need a further definition, I encourage you to refer to it.

In addition to the words defined in the Glossary within the Workbook, there is some additional lingo we’ll use during our training today. Some of these words or phrases might be familiar to you. Others not so much. Let’s do an exercise to get familiar with them.

KEY WORDS: 2 TRUTHS & 1 LIE

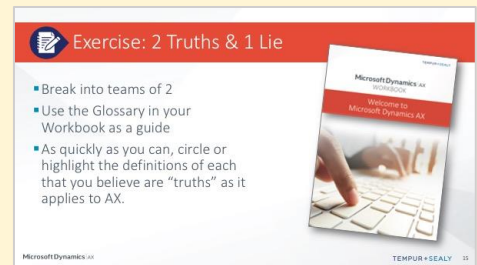
 10 minutes

 **WORKBOOK: PAGE 11**

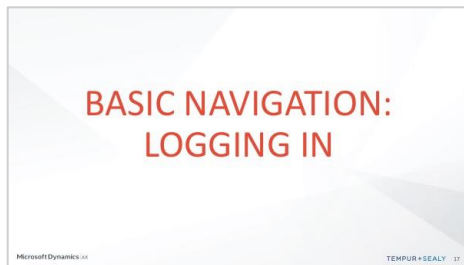
DIRECTIONS:

- ▶ Break into teams of 2
- ▶ Use the Glossary in your Workbook as a guide
- ▶ As quickly as you can, circle or highlight the definitions of each that you believe are “truths” as it applies to AX. There are a few funny answers in there so remember these are definitions as it relates to AX
- ▶ Share Optional separate Terminology Handout so they can easily use at their desk.

 **DEBRIEF: SHARE CORRECT ANSWERS (PPT SLIDE – CLICK THROUGH ANSWERS)**



Basic Navigation: Logging In



INSTRUCT:

We’ve talked about the benefits of AX – now let’s dive a little deeper into how it works – and how you’ll access it.

NOTE TO LEADER: PRIOR TO YOUR TRAINING SESSION, IDENTIFY WHICH LOGIN METHOD YOUR AUDIENCE WILL USE: EMAIL LINK/WEB BROWSER OR DESKTOP APP. DISCUSS AS APPROPRIATE.