

AX Pro Tips

The ask: Create a simple way to communicate tips, concerns, and changes after a new ERP launch.

The solution: AX Pro Tip emails sent daily via MailChimp for three months post go-live.

Content was developed from cross-functional team feedback, error reporting, and patterns in questions trainers received in hyper-care chats.

The risks: Daily emails can become white noise. The tips had to balance being engaging, succinct, and helpful while being careful not to come across as critical to agents that were working mandatory overtime during a very stressful implementation.

The reception: Supervisors utilized Pro Tips in their daily team calls and chats. Agents looked forward to the emails and quickly began sending in their own tips to a suggestions email box. Teams outside of the initial audience asked to be added to the email list and/or copied the emails for their own usage. When a tip was sent out, an immediate improvement would be seen in the area of performance the tip addressed.

More examples:

Tuesday, December 7, 2021 at 19:50:34 Eastern Standard Time

Subject: AX Pro Tip
Date: Thursday, March 11, 2021 at 11:59:25 AM Eastern Standard Time
From: AX Learning & Development
To: West, Tyrah

Microsoft Dynamics | AX

Pro Tip

Flipping Out

Have you looked at an order and wondered why it's not moving? If manual orders aren't flipped from journal to sales order and confirmed, they will never progress.

I bet you can figure out why we are sending this reminder.

Gentle reminder...you can always check the grid and make certain you're completing all steps in order to get the order to your customer.

Have an idea for an AX Pro Tip?

Please email suggestions@tempuseasy.com



Tuesday, December 7, 2021 at 19:59:53 Eastern Standard Time

Subject: AX Pro Tip of the Day
Date: Wednesday, February 24, 2021 at 2:11:20 PM Eastern Standard Time
From: AX Learning & Development
To: West, Tyrah

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Pro Tip



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Attention: Do not create early credit requests for refunds.

EDI automatically communicates to AX that returned product has been received and starts processing returns for us the night a product has been picked up...typically within 48 hours. Friday pick-ups may be processed on Monday.

In the very rare occasion that a product (small items included) has been picked up from the customer or refused/cancelled at the delivery agent, but the item has not been received back into AX within 72 hours, follow these steps:

- Check that a Scope ticket has been entered by the SPL. There is a center exception report that triggers a Scope ticket for these incidences at the delivery agent. If there is a Scope ticket, communicate that the return is in process to the customer.
- If there is not a Scope ticket already and you verified the item(s) was picked up, create a Scope ticket for the customer using the Categorization in the screen shot example below.

Outside of the rare exception mentioned above, let EDI and AX do the work.

If it has been over 15 business days since a customer's product has been received back in the system and a customer has not received their refund, then you can go ahead and process a credit only for the customer.

TLDR: Do not default to creating a credit only in the customer's account for an early credit as it is adding more complexity and orders not needed on their account, confuses AR, and creates a greater chance of user error.

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