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. **The challenge:** Taking leads like the email below and tracking down the information needed, simplifying complex messaging from SMEs and creating support documents with very little context or foundational knowledge.

Subject: FW: Wells Fargo order missing information 2/16/21

Tyrah,

We have an important request for tip of the day & there is some urgency to this...

We need to remind people to update payment type, so that the order doesn't inherit a default that might be correct when we process exchanges. There is much more detail that Aaron, Courtney and Monica will be able to provide. Can we get this out tomorrow or TH? I know it's a short turn, but would be very valuable. Let me know if this is doable.

Thanks! Amy

Tuesday, December 7, 2021 at 20:02:01 Eastern Standard Time

Subject	t: AX Pro Tip of the Day
Date:	Wednesday, February 17, 2021 at 1:55:31 PM Eastern Standard Time
From:	AX Learning & Development
To:	West, Tyrah

Microsoft Dynamics AX

Pro Tip

Payment Type Pains

Please pay close attention to the payment types you are using in orders. Many orders are being entered with the wrong payment terms and types which causes orders to be placed on hold, more calls, more emails, angry customers, mass hysteria! Here are the most common errors we are seeing:

- \$0 sales orders with NCC or CC in the payment type. Those orders do not progress because the system is expecting to see a credit card. The correct payment type for \$0 orders is Nooo. Think...do you need a CC for \$0 sales orders? Noooooooooo.
- so return orders without an RCC payment form. RCC really means return to the original payment form. Also returns not tied to an order in AX (Oracle orders) need to be RCC payment type.
- Wells Fargo Woes...we're seeing a number of various types of orders (return orders, sales orders, and sales category retund or bill orders) which should be billing or retunding via Wells Fargo, but the Payment Type and Wells Fargo fields (Plan, Auth, WF Number) are incorrect or blank. Any time an order should charge or retund to Wells Fargo, the

ment Type should be 'FINANCE' and the Plan, Auth, and WF Number ds must be populated property.

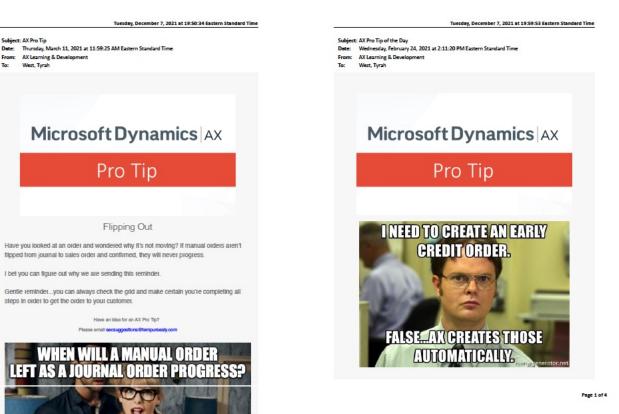
ee below or head to SharePoint.here for a chart to help you use the ayment terms and types.

Idea for an AX Pro TIp? mall secsuggestions@tempursealy.com



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More examples:



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 occesion 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 licket has been entered by the 3PL. There is a carrier exception report that
 triggers a Scope licket for these incidences at the delivery agent. If there is a Scope licket,
 communicate that the return is in process to the customer.
- If there is not a Scope ticket already and you vertiled 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.

TUDR; 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.

> Have an idea for an AX Pro Tip? Please email secsuggestions@tempusealy.com

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