

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

Tyrrah,

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: 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, Tyrrah

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? Noooooooooooo.
- \$0 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 refund or bill orders) which should be billing or refunding 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 refund to Wells Fargo, the

Payment Type should be 'FINANCE' and the Plan, Auth, and WF Number fields must be populated properly.

See below or head to SharePoint [here](#) for a chart to help you use the payment terms and types.

Idea for an AX Pro Tip?
Email seccuggestions@tempursey.com

AX Common Payment Types

Payment	Payment Type	Usage
DOM		
CC	MasterCard	MasterCard orders only. Do not use for credit card orders.
CC	Visa	Visa orders only. Do not use for credit card orders.
CC	Discover	Discover orders only. Do not use for credit card orders.
CC	Amex	Amex orders only. Do not use for credit card orders.
CC	Other	Other credit card orders. Do not use for credit card orders.
INTL		
INTL	MasterCard	MasterCard orders only. Do not use for credit card orders.
INTL	Visa	Visa orders only. Do not use for credit card orders.
INTL	Discover	Discover orders only. Do not use for credit card orders.
INTL	Amex	Amex orders only. Do not use for credit card orders.
INTL	Other	Other credit card orders. Do not use for credit card orders.
FINANCE		
FINANCE	Wells Fargo	Wells Fargo orders only. Do not use for credit card orders.
FINANCE	Other	Other finance orders. Do not use for credit card orders.

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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

**WHEN WILL A MANUAL ORDER
LEFT AS A JOURNAL ORDER PROGRESS?**



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

Microsoft Dynamics | AX

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 A/R, and creates a greater chance of user error.

Have an idea for an AX Pro Tip?

Please email suggestions@tempuseasy.com

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