

## MOC 80414 A Service Management in Microsoft Dynamics AX 2012

### Course Summary

#### Description

This two-day instructor-led course provides students with an overview of Service management features and functionality in Microsoft Dynamics AX 2012. This course covers the major functions and describes how service management is integrated with the Project management and accounting module. The participants for this course should have basic knowledge of the earlier versions of Microsoft Dynamics AX.

#### Objectives

At the end of this course, students will be able to:

- Describe the functionality of service management and its potential for optimizing a business.
- Provide an overview about the Service management course.
- Build a Service agreements form.
- Set up the elements required to create a service agreement header.
- Create a service agreement header and lines.
- Create a service agreement and service object relation/service task relation.
- Copy service agreement lines into a service agreement.
- Create service template groups.
- Create a service template and copy template lines into a service agreement.
- Create service agreements from a sales order.
- Describe how and when service is provided to the customer.
- Link service order to a project and register transactions as revenue and cost for service that is performed.
- Build a Service orders form.
- Define the different elements that support the creation and processing of service orders.
- Set up service parameters as per the business needs.
- Set up service stages and reason codes.
- Set up service order activity.
- Create sales and marketing activities when you create service orders.
- Create a service order manually and automatically.
- Create a service order from a sales order.
- Process, post, and create a service order invoice.
- Optimize the flow of information and create transactions with regard to service orders.
- Set up service level agreements.
- Set up time recording on service level agreements and service orders.
- View the information about service level agreement and service order.
- Sort and filter service agreements in the service agreements group.
- Set up the different components of service dispatcher including default preferred technician, activity types, dispatch teams, and resources.
- Use the Dispatch board.
- Perform typical activity actions.
- Change values on the Dispatch board and manage undisputed activities.
- Explain the Dispatch board functionality and describes how it helps to optimize service order management.
- Set up component elements of the repair functionality with regard to customer and technician diagnosis and resolution.
- Set up symptom areas, symptom codes and conditions
- Set up diagnosis areas, diagnosis codes, and resolutions.
- Set up repair stages.
- Create and process a repair line.
- Register resource consumption for repairs.
- Create and modify a template BOM and attach it to a service object relation.
- Create a Service BOM.

## MOC 80414 A Service Management in Microsoft Dynamics AX 2012

### Course Summary (cont'd)

- Create service order lines from a BOM.
- Setup the service BOM to register changes to the service object over time caused by service actions.
- Create and set up the elements of service subscription functionality.
- Create a subscription and service subscription transactions.
- Create a service subscription fee transaction.
- Create invoices and credit transactions.
- Accrue revenue from a subscription fee transaction.
- Create service orders by using Enterprise Portal.
- Edit the service orders in Enterprise Portal.
- View and create repair lines in Enterprise Portal.
- Manage web service orders.

#### Topics

- Introduction
- Service Agreements
- Service Orders
- Service Level Agreements
- Service Dispatcher
- Repair in Microsoft Dynamics AX 2012
- Service Management Bill of Materials
- Service Subscription
- Using the Enterprise Portal for Service Management

#### Audience

This course is intended for partners, customers, and Microsoft team members with moderate to extensive knowledge of Project management and accounting functionality in Service management.

#### Prerequisites

Before attending this course, students must have working experience of Project Essentials in Microsoft Dynamics AX 2012 and knowledge of Project Advanced in Microsoft Dynamics AX 2012 courses.

#### Duration

Two days

## MOC 80414 A Service Management in Microsoft Dynamics AX 2012

### Course Outline

#### I. Introduction

This introduction shows how the Service management module is designed for companies to manage their service operations as a business in Microsoft Dynamics AX 2012.

- A. Introduction
- B. Overview of the Course Chapters

#### II. Service Agreements

The Service agreements form is the central element in a service agreement. A service agreement also relates to other elements of the Service management module.

- A. Introduction
- B. Building Up of the Service Agreements Form
- C. The Service Agreement Header
- D. Creating the Service Agreement Header
- E. Creating Service Objects and Service Task Relations
- F. Service Agreement Lines
- G. Copying Lines into Service Agreement
- H. Creating a Service Agreement from a Sales Order

**Lab: Create a Service Agreement**

**Lab: Copy lines into a Service Agreement**

#### III. Service Orders

This module explains how the service orders are created by using a specific process. In addition by using Microsoft Dynamics AX 2012, users can perform repair work on a service object.

- A. Introduction
- B. Building a Service Orders Form
- C. Defining the Settings for Service Order Creation
- D. Service Management Parameters
- E. Service Stages
- F. Creating Service Orders Manually
- G. Creating Service Orders Automatically
- H. Creating a Service Order from a Sales Order
- I. Items Requirements, and Canceling and Deleting Service Orders
- J. Posting Service Orders
- K. Invoicing Service Orders

**Lab: Create and Process a Manually Created Service Order**

**Lab: Create Service Orders Automatically**

#### IV. Service Level Agreements

This module explains the concept of service level agreement and how to create a new service order attached to a service level agreement with defined intervals to perform a task. It explains the how service orders are processed.

- A. Introduction
- B. Service Level Agreement Overview
- C. Setting Up Service Level Agreement
- D. Time Recording
- E. Service Level Agreement and Service Order

**Lab: Set Up a Service Level Agreement**

#### V. Service Dispatcher

This module shows how Service Dispatcher is a part of the service management module in Microsoft Dynamics AX 2012 and it provide a dynamic management of service orders and service agreements both for customers and service companies. The procedure to create service dispatcher is described along with an overview of the service operation.

- A. Introduction
- B. Service Dispatcher Overview
- C. Generating Activity
- D. Setting Up Service Dispatcher
- E. Dispatch Board

**Lab: Generate Activities**

#### VI. Repair in Microsoft Dynamics AX 2012

This module describes how the Repair functionality in Microsoft Dynamics AX 2012 is used to perform repairs and the procedure to use this functionality. Repair functionality in Service management is also used to record the different stages in the repair cycle. In addition; a service company can use the Repair functionality to register resource consumption for the repair task, and generate Repair reports.

- A. Introduction
- B. Setting Up Symptom Areas, Symptom Codes and Conditions
- C. Setting Up Diagnosis Areas, Diagnosis Codes, and Resolutions.
- D. Setting Up Repair Stages
- E. Repair Lines
- F. Creating Service Order Transactions for Repairs

## **MOC 80414 A Service Management in Microsoft Dynamics AX 2012**

### **Course Outline (cont'd)**

#### **Lab: Create a Repair Line and Register Service Order Transactions**

#### **VII. Service Management Bill of Materials**

This module explains how beneficial this feature is for the service company. Service management Bills of Materials helps to track service objects at the customer's site, generate a service object change and even obtain a replacement history.

In addition, the service company can create and edit template BOMs and register updates in the BOM composition and resources by using the BOM Designer.

- A. Introduction
- B. Creating a Template BOM
- C. Creating a Service BOM
- D. Updating a Service BOM
- E. Creating a Service Order Lines from a BOM

#### **Lab: Create Service BOM Version**

#### **VIII. Service Subscription**

This module shows you how the service subscription is integrated with the Project management and accounting module in Microsoft Dynamics AX 2012.

All processes related to creating and processing service subscription are explained. In addition, users can set up service subscriptions, create and processes subscription fee transactions, and credit the subscription transactions.

- A. Introduction
- B. The Elements of the Service Subscription System
- C. Creating a Subscription
- D. Creating a Subscription Fee Transactions
- E. Creating Subscription Type Transactions
- F. Subscription Indexing
- G. Adjusting subscription transactions
- H. Invoicing Subscription Fee Transactions
- I. Creating Credit Notes for Subscription Transactions
- J. Accruing Revenue on Subscription Fee Transactions

#### **Lab: Create a Subscription, a Subscription Transaction, and Accrue the Transaction**

#### **Lab: Reverse Subscription Accruals**

#### **IX. Using the Enterprise Portal for Service Management**

This module shows you how the Service management module is improved with features that provide customers and service companies more dynamic management of service orders and service agreements. The service management area is used by the technician and the self service portal is used by the customers to manage and oversee service orders.

- A. Introduction
- B. Service Management Area for Technician in the Enterprise Portal
- C. Customer Self-Service Portal
- D. Web Service Orders

#### **Lab: Create a Service Order**