

80414: Service Management In Microsoft Dynamics AX 2012

Course Details

Course Outline

1. Module 1: Introduction

- Introduction
- Overview of the Course Chapters

2. Module 2: Service Agreements

- Introduction
- Building Up of the Service Agreements Form
- The Service Agreement Header
- Creating the Service Agreement Header
- Creating Service Objects and Service Task Relations
- Service Agreement Lines
- Copying Lines into Service Agreement
- Creating a Service Agreement from a Sales Order
- Lab : Create a Service Agreement
- Lab : Copy lines into a Service Agreement

3. Module 3: Service Orders

- Introduction
- Building a Service Orders Form
- Defining the Settings for Service Order Creation
- Service Management Parameters
- Service Stages
- Creating Service Orders Manually
- Creating Service Orders Automatically
- Creating a Service Order from a Sales Order
- Items Requirements, and Canceling and Deleting Service Orders
- Posting Service Orders
- Invoicing Service Orders

- Lab : Create and Process a Manually Created Service Order
- Lab : Create Service Orders Automatically

4. Module 4: Service Level Agreements

- Introduction
- Service Level Agreement Overview
- Setting Up Service Level Agreement
- Time Recording
- Service Level Agreement and Service Order
- Lab : Set Up a Service Level Agreement

5. Module 5: Service Dispatcher

- Introduction
- Service Dispatcher Overview
- Generating Activity
- Setting Up Service Dispatcher
- Dispatch Board
- Lab : Generate Activities

6. Module 6: Repair in Microsoft Dynamics AX 2012

- Introduction
- Setting Up Symptom Areas, Symptom Codes and Conditions
- Setting Up Diagnosis Areas, Diagnosis Codes, and Resolutions.
- Setting Up Repair Stages
- Repair Lines
- Creating Service Order Transactions for Repairs
- Lab : Create a Repair Line and Register Service Order Transactions

7. Module 7: Service Management Bill of Materials

- Introduction
- Creating a Template BOM
- Creating a Service BOM
- Updating a Service BOM

- Creating a Service Order Lines from a BOM
- Lab : Create Service BOM Version

8. Module 8: Service Subscription

- Introduction
- The Elements of the Service Subscription System
- Creating a Subscription
- Creating a Subscription Fee Transactions
- Creating Subscription Type Transactions
- Subscription Indexing
- Adjusting subscription transactions
- Invoicing Subscription Fee Transactions
- Creating Credit Notes for Subscription Transactions
- Accruing Revenue on Subscription Fee Transactions
- Lab : Create a Subscription, a Subscription Transaction, and Accrue the Transaction
- Lab : Reverse Subscription Accruals

9. Module 9: Using the Enterprise Portal for Service Management

- Introduction
- Service Management Area for Technician in the Enterprise Portal
- Customer Self-Service Portal
- Web Service Orders
- Lab : Create a Service Order