

2 Days

## Service Management in Microsoft Dynamics AX 2012

Microsoft Dynamics® AX 2012 Service Management 80414 is an instructor-led course that caters students with an overview of Service management features and functionality in Microsoft Dynamics® AX 2012. It covers important functions and elaborates how service management is unified with the Project management and accounting module.

The applicants for this course should at least have basic knowledge of the earlier versions of Microsoft Dynamics AX.

### Objectives:

- You should be able to meet the following objectives after the completion of the course:
- Provide an overview about the Service management course.
- Accrue revenue from a subscription fee transaction.
- Provide the Explanation of the Dispatch board functionality that helps to optimize service order management.

## Course Details

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### Course Outline

#### Module 1: Introduction

##### Lessons

- Introduction
- Overview of the Course Chapters

#### Module 2: Service Agreements

##### Lessons

- 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

### **Module 3: Service Orders**

#### **Lessons**

- 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

### **Module 4: Service Level Agreements**

#### **Lessons**

- Introduction
- Service Level Agreement Overview
- Setting Up Service Level Agreement
- Time Recording
- Service Level Agreement and Service Order
- Module 5: Service Dispatcher
- Lessons
- Introduction
- Service Dispatcher Overview
- Generating Activity
- Setting Up Service Dispatcher
- Dispatch Board

### **Module 6: Repair in Microsoft Dynamics AX 2012**

#### **Lessons**

- Introduction
- Setting Up Symptom Areas, Symptom Codes and Conditions
- Setting Up Diagnosis Areas, Diagnosis Codes, and Resolutions.

### **Module 7: Service Management Bill of Materials**

#### **Lessons**

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

### **Module 8: Service Subscription**

## Lessons

- Introduction
- The Elements of the Service Subscription System
- Creating a Subscription
- Creating a Subscription Fee Transactions
- Creating Subscription Type Transactions

## Module 9: Use of the Enterprise Portal for Service Management

### Lessons

- Introduction
- Service Management Area for Technician in the Enterprise Portal
- Customer Self-Service Portal
- Web Service Orders

## Who Should Attend

This course is for the following, with moderate to extensive knowledge of Project management and accounting functionality in Service management.

- Partners
- Customers
- Microsoft team members

## Pre Requisite

The students should have knowledge and work experience of the following, before attending this course:

- Project Essentials in Microsoft Dynamics® AX 2012
- Project Advanced in Microsoft Dynamics® AX 2012 courses

## Exams

Microsoft Certified Professional (MCP) []

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