



Microsoft

MAXRET12F

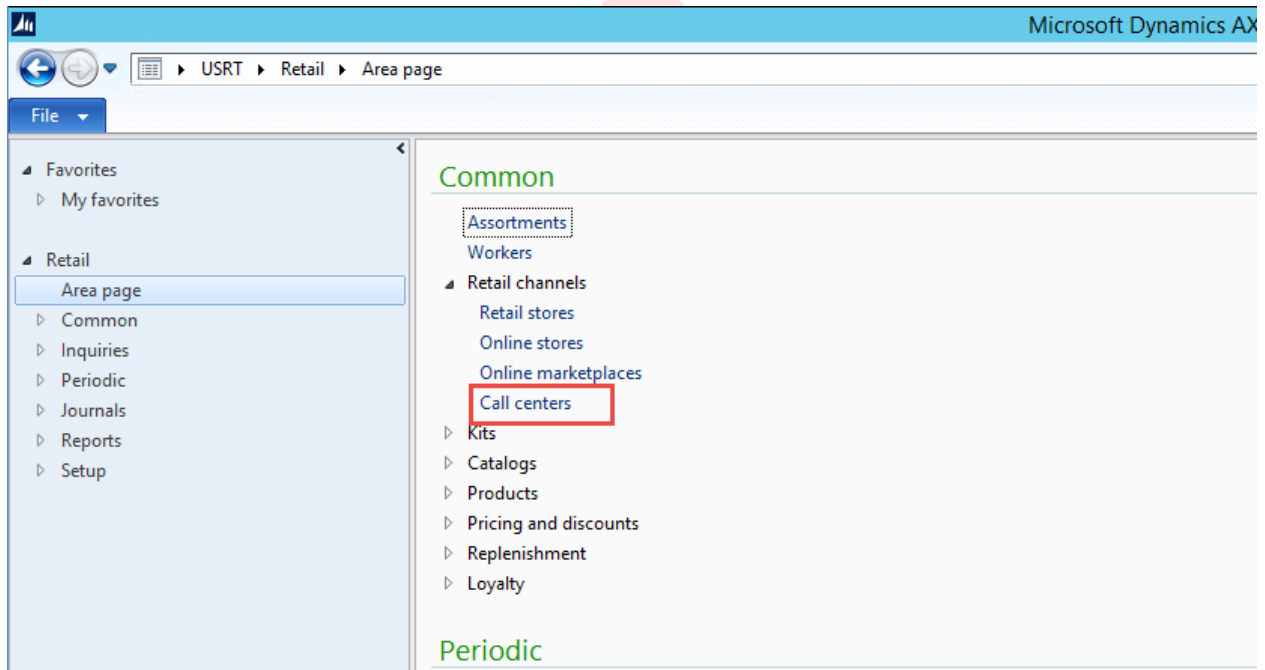
Additional courseware

v1.0

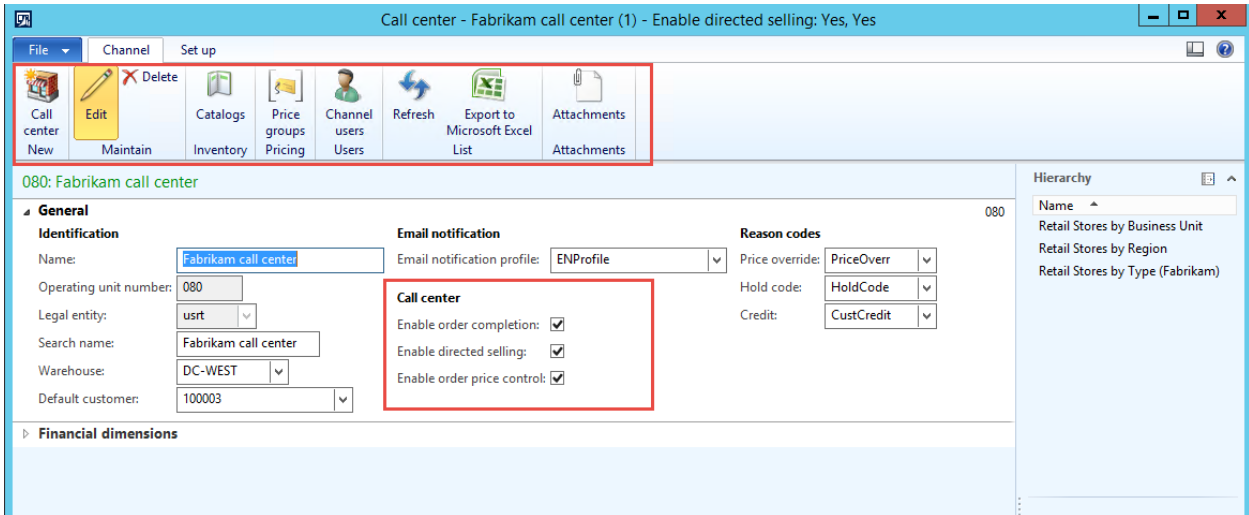
1 MODULE 3: RETAIL CHANNELS

1.5 Retail Channel – Call Centre

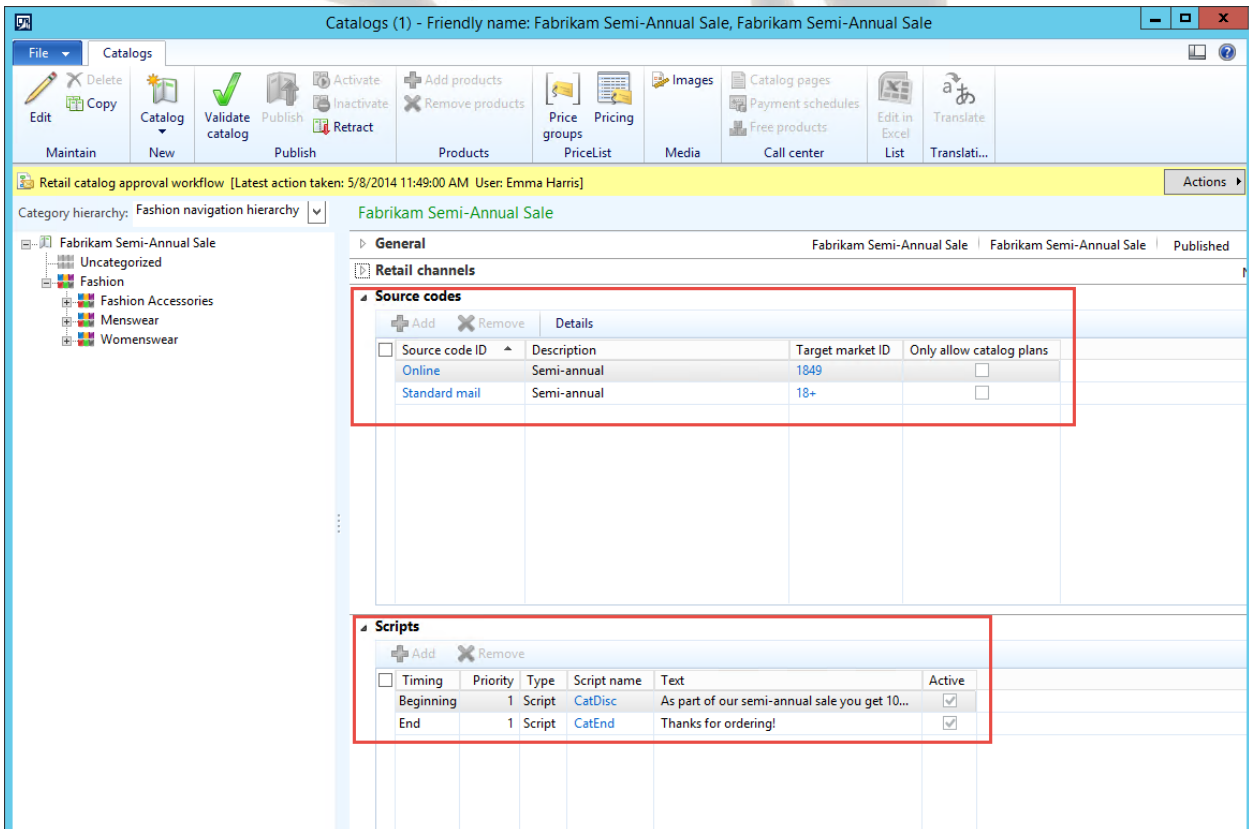
Let's review the new feature for call center added in Microsoft Dynamics AX 2012 R3. Microsoft Dynamics AX 2012 R3 includes several new features. One of them is the retail channels and the new retail channel which has been added as a call center functionality. The call center functionality provides the ability to create a new channel for retailers who intend to increase their Omni-channel presence in the retail market to increase their revenue.



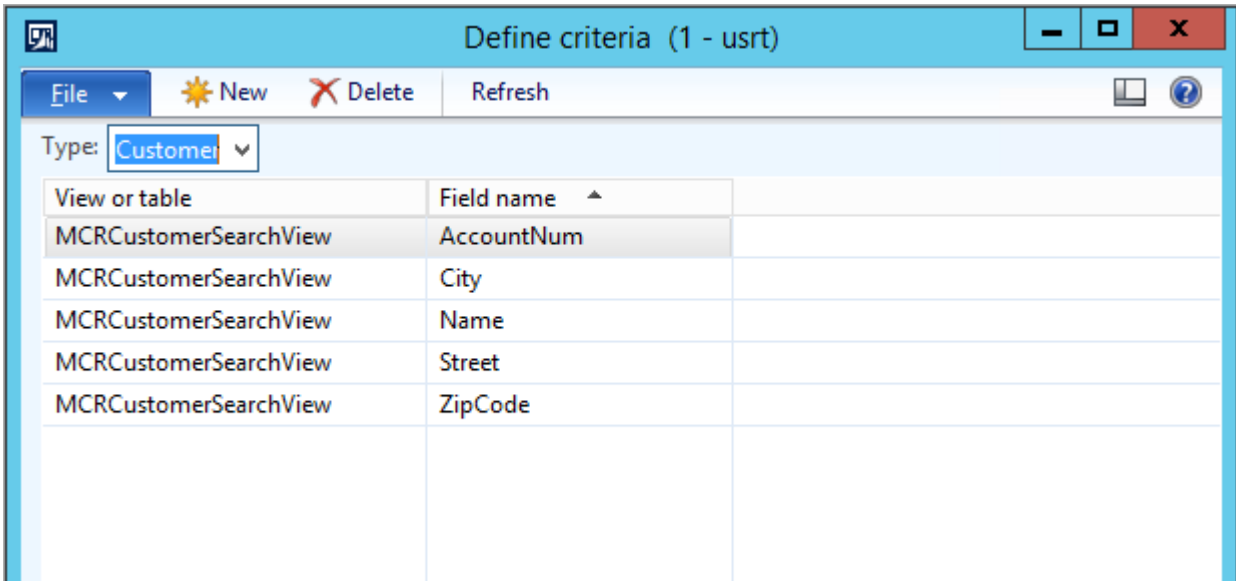
Typically retailers use the call center functionality to manage the mail order catalog, media advertising on television, radio, or billboards. Online stores may also provide capability for their customers to call the call center to place orders. All the call functions such as product management, catalog management, promotions, pricing, assortment, organization hierarchies are extended to be utilized as part of the new call center function. The function provides a lot of features for the call center operation which includes operating tasks such as scripting, order processing and service management. Call center functionality includes features that are designed to make it easier to take the phone orders and handle the customer service throughout the order fulfillment process. It gives the call center workers the capability to enter payment information directly into the sales order, view detailed summary of charges and payments before the order submission, and there are several options to control pricing and can access various data information about customer products and prices from the sales order form. The call center has the enhanced functionality for tracking customer history and order status. Both the call center and retail modules are used to perform key setup and configuration tasks for call center, whereas the call center module is used to perform ongoing management of the call center data. Some of the key features that have been added for the call center have been listed here. Microsoft Dynamics AX 2012 R3 has added and changed several features. For instance, a new retail channel type has been added known as the call center.



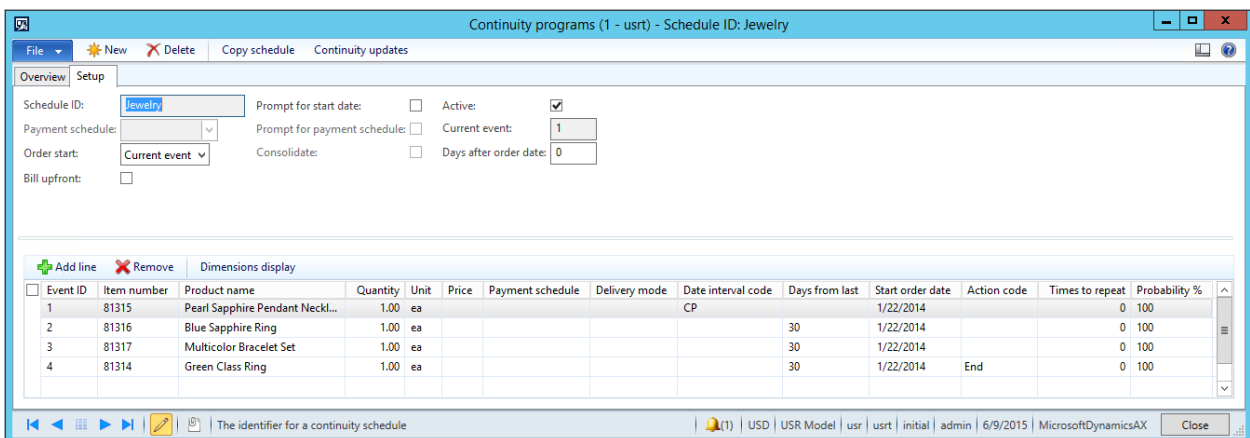
In the call center, the users can gain the ability to take customer orders over the phone and create sales orders. Additionally, call centers can be added to all the hierarchies and can be managed with online and retail stores. New call centers can be set up in the retail module; however, many typical management tasks for call center are available in the call center manual. Scripts can be pre-defined messages that a call center employee can read to their customers during order entry.



Now users can create scripts that appear in the sales order form at the time of order entry. Based on customer catalog, product up-sell or cross-sell, every order has got a default script or a default script can be done at the product level. You can create and associate a catalog to a call center. Tele-scripting can be assigned to prompt the call center person to initiate the call with the customer. Users can perform full text searches for products in the sales order form.

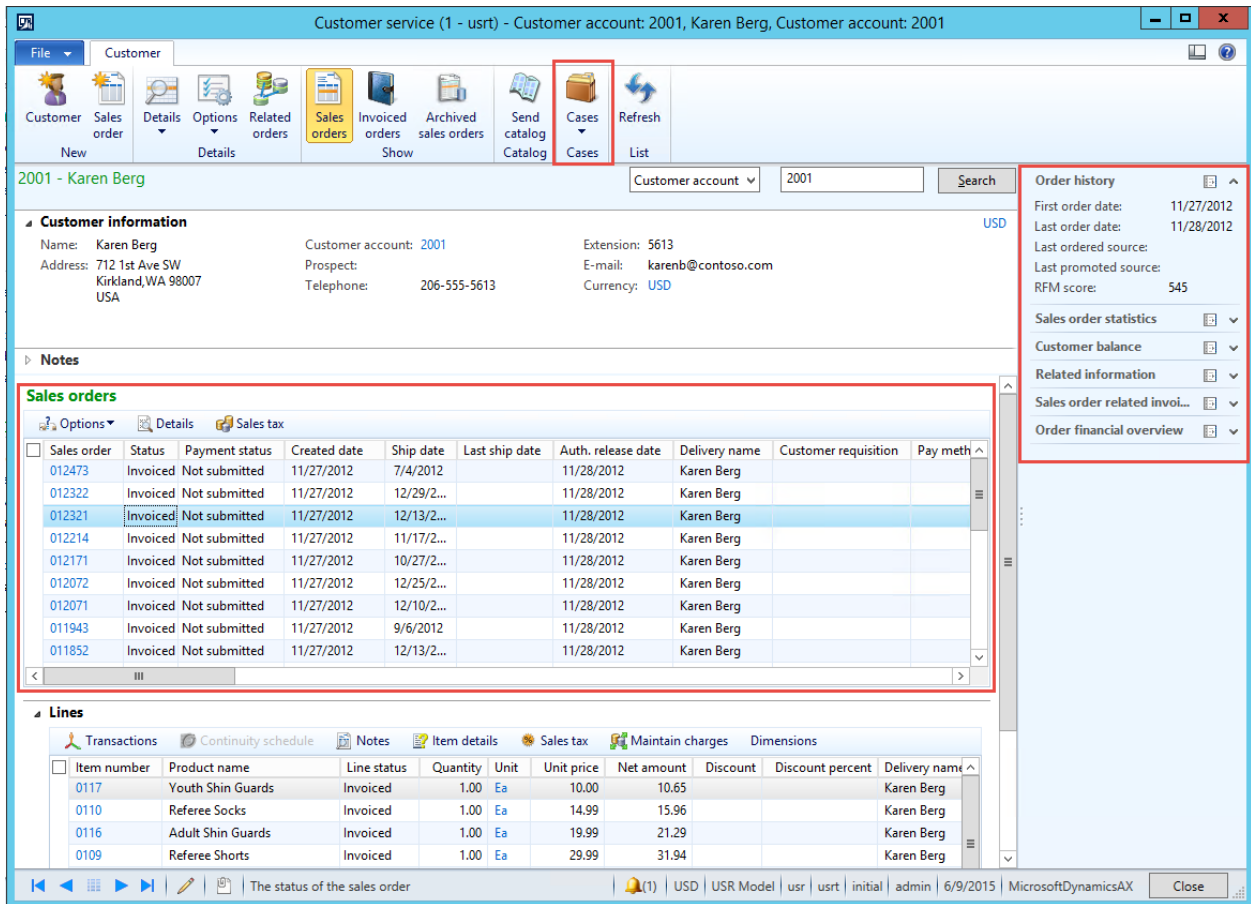


Users can view the calculated margin values for broker royalties and rebates in the sales order form. Orders can be put on hold. On hold features include details about who puts the order on hold and when. Likewise, when a hold order is cleared, it can be automatically sent for shipping or picking. Let's look at an example of a hold order. If a check payment is received, which is probably under \$100, they may allow the order to be processed. If the order is over \$100, the order may be put on hold and wait for three days' clearing. Once it is cleared, the order can be automatically released for pick/pack process. Simple fraud alerts can be set up for the order process. For example, trigger an order to be on hold based on the delivery address or ZIP code, or the combination of product and ZIP code. Fraud alerts can be set up based on scoring, based on the product, based on the sales order limit, and you can set up multiple rules that adds up to a score of 100. Orders, of course, can be placed on hold manually. Call center order personnel can receive prompts when entering orders to up-sell and cross sell the products. You can define catalog pages and map the products to the pages, and the respective sections of the page should track the effectivity and for revenue purposes only. Organizations can set up and manage continuity programs. They are just like recurring sales order.



For example, a customer can receive regular product shipments in a pre-defined schedule. For example, if you are getting wine of the month every month, you can create a recurring order and engage with the retailer for 12 months for a continuity program. And the list of features for the call

center goes on. You can track customer cases. The customer service form gives you the ability to look up the order history, look at the line item which catalog they ordered from, and when the catalog was mailed. It provides you the case management capability to track and prioritize.



Customer service (1 - usrt) - Customer account: 2001, Karen Berg, Customer account: 2001

Customer account: 2001

Customer information

Name: Karen Berg
Address: 712 1st Ave SW
Kirkland, WA 98007
USA

Customer account: 2001
Prospect:
Telephone: 206-555-5613

Extension: 5613
E-mail: karenb@contoso.com
Currency: USD

Sales orders

Sales order	Status	Payment status	Created date	Ship date	Last ship date	Auth. release date	Delivery name	Customer requisition	Pay meth
012473	Invoiced	Not submitted	11/27/2012	7/4/2012		11/28/2012	Karen Berg		
012322	Invoiced	Not submitted	11/27/2012	12/29/2...		11/28/2012	Karen Berg		
012321	Invoiced	Not submitted	11/27/2012	12/13/2...		11/28/2012	Karen Berg		
012214	Invoiced	Not submitted	11/27/2012	11/17/2...		11/28/2012	Karen Berg		
012171	Invoiced	Not submitted	11/27/2012	10/27/2...		11/28/2012	Karen Berg		
012072	Invoiced	Not submitted	11/27/2012	12/25/2...		11/28/2012	Karen Berg		
012071	Invoiced	Not submitted	11/27/2012	12/10/2...		11/28/2012	Karen Berg		
011943	Invoiced	Not submitted	11/27/2012	9/6/2012		11/28/2012	Karen Berg		
011852	Invoiced	Not submitted	11/27/2012	12/13/2...		11/28/2012	Karen Berg		

Order history

First order date: 11/27/2012
Last order date: 11/28/2012
Last ordered source:
Last promoted source:
RFM score: 545

Lines

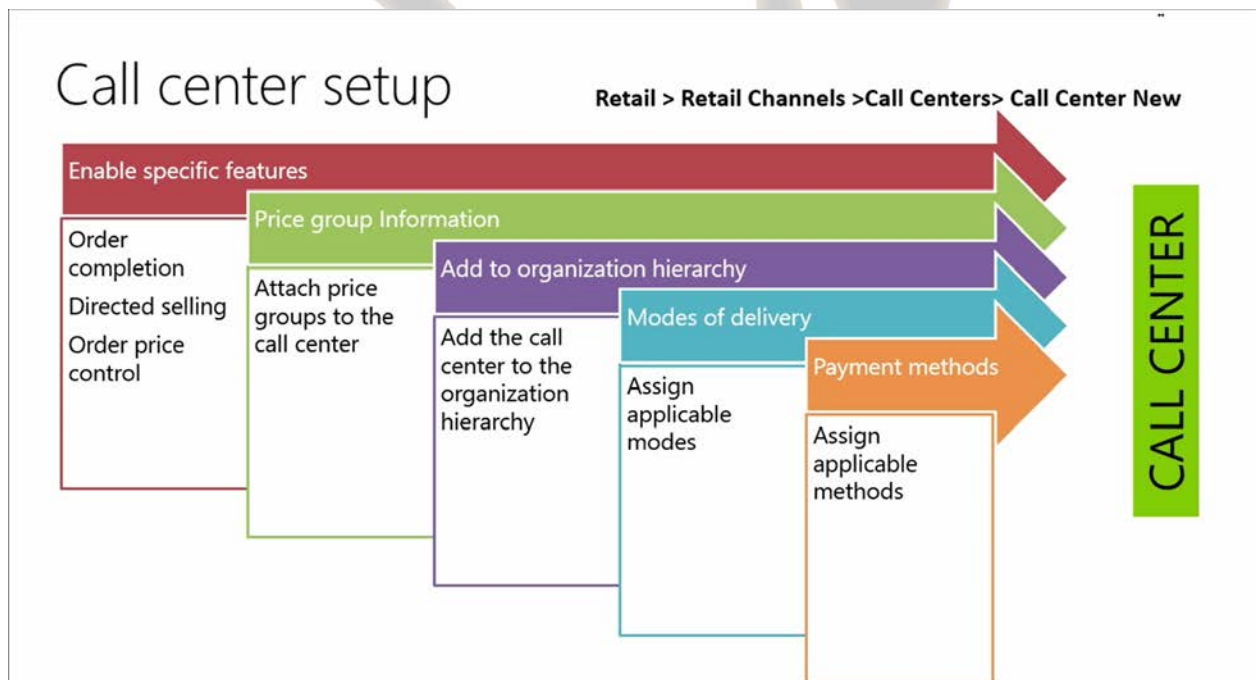
Item number	Product name	Line status	Quantity	Unit	Unit price	Net amount	Discount	Discount percent	Delivery name
0117	Youth Shin Guards	Invoiced	1.00	Ea	10.00	10.65			Karen Berg
0110	Referee Socks	Invoiced	1.00	Ea	14.99	15.96			Karen Berg
0116	Adult Shin Guards	Invoiced	1.00	Ea	19.99	21.29			Karen Berg
0109	Referee Shorts	Invoiced	1.00	Ea	29.99	31.94			Karen Berg

It also can pop up open issues to flag a hot topic to the call center personnel. It gives the users the ability to track sales order events. They can view detailed order statuses. Detailed order information can include payments, picking and packing, delivery, invoicing, holds, back orders and returns. Users can attach notes to a customer order or order line. The system provides the ability to generate letter templates which can be used to generate personalized customer communication. Users can track customer statistics, for instance, data includes the date of the customer's first order, the date of the last order, the total amount that was being invoiced and the total returns.

Organizations can set up an expedited shipping mode that can applied to a sales order or a sales order line. You have the facilities for managing your duplicate customers. This is referred to as merge. You're able to see the sales history in the merge customer record; however, the sales history remains with the previous customer. When a tele-salesperson accesses a customer account, if it is merge, the customer then -- the sales person will receive a warning that the customer has been merged. It should be noted that deprecated customer information is linked to the current customer. It displays all orders and other information from the linked customer. You are able to classify a customer what we call as RFM, which is the RFM store, and the full acronym is recency, frequency, and monitoring. You can quickly classify the customers to understand how the -- how much they buy, how often and how frequently and set up the ratings to monitor their dealings with the organization.

Other features which include -- which I include in the call center release is to create a custom item list for frequently ordered products. You have the ability to track direct delivery purchase orders while associated sales order, precise control of pricing for call center sales orders. You can accept multiple payment types and split payments. You can set up coupons tied to a customer or a catalog or a product. Whenever you add it to the order, you can validate the single-use coupon or send it to the customer when required. You can do price match discounts and attach reason codes to it. You can process gift cards. As I mentioned earlier, gift cards can be processed across any channels. You can redeem it online, and it supports both the types of gift cards, card and electronic. You can set up shipping charges. You have the capability of rental list management, and the term here is basically you can buy or rent a list of customer lists. You can import it. You can set rules such as expiry date to use the list for three months, after which it is not usable or expires or is not visible.

You can set up your sales stacks defaulting based on delivery address or based on the rules in each country or region. It's got specific reporting around the catalog area. We can look at the performance of the product based on the catalog and the layout of the catalog. The other functionality introduces the picking workbench. You can run -- it's a front-end to an existing AX functionality. For example, you can run the picking by delivery method or by payment type or based on priority level. As a high level, to set up the call center, you need to go to retail, retail channels, call centers, and call center new.



Each call center can have its own users, payment methods, price groups, financial dimensions, and modes of delivery that are configured at the time of creation of the call center. As a high level overview, you need to enable specific features for the call center function. In the general FastTab, you need to go to the call center form. It is used to enable or disable groups of features that are unique to call centers, and enabling these features, they're available on the sales order form for users who are associated with the call center. The features which are allowed are order completion. This group includes features that are related to payments and order completion in the sales order

form, a complete button to complete sales orders, recap button, review, and submit the orders and a coupons button.

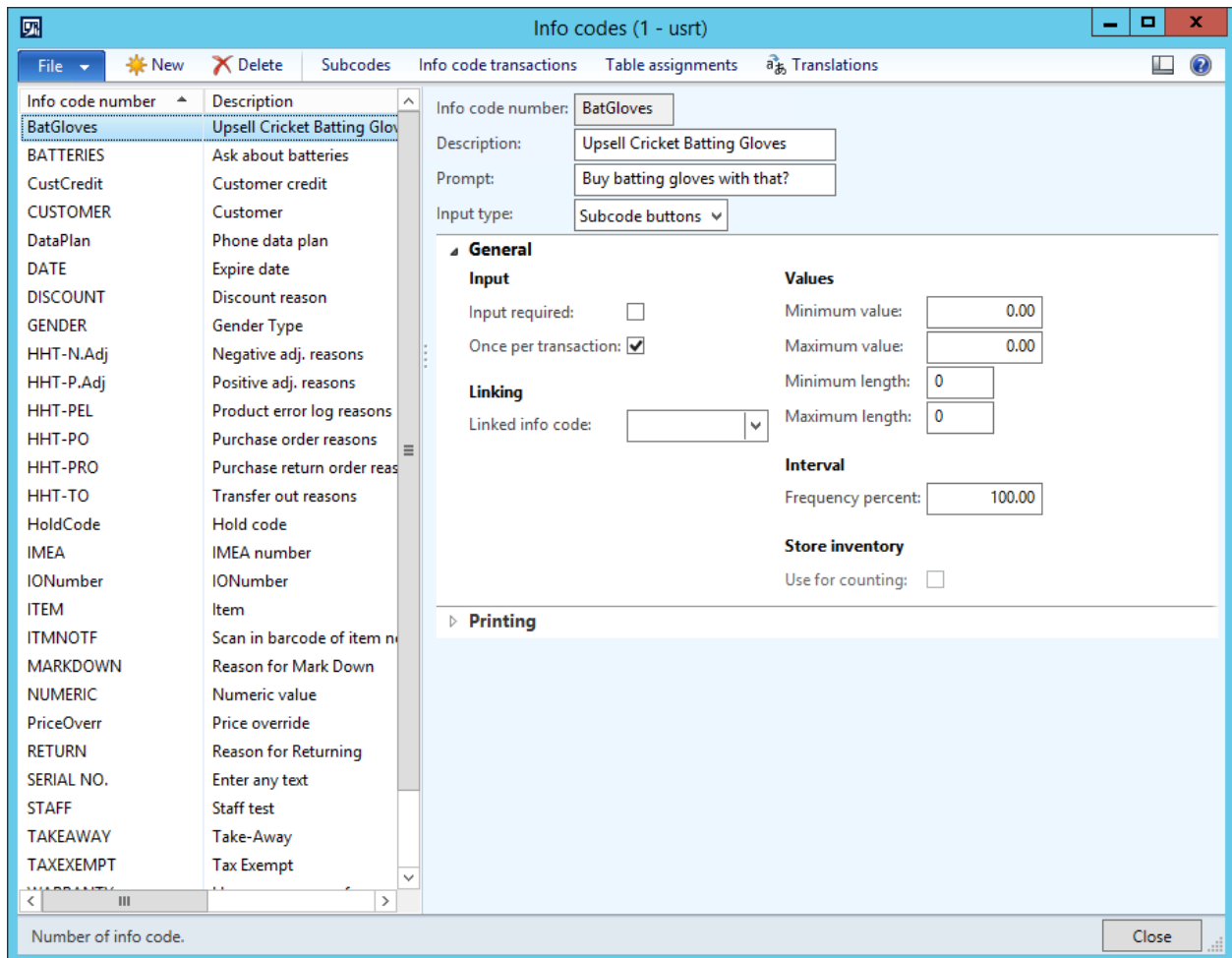
Directed selling, is the group includes features that are related to source codes, scripts, regional item requests, and catalog requests. Price control, this group includes features that are related to pricing control, options in the sales order form like price matching, price details, price overrides and price alerts. Financial dimensions FastTab. Enter the financial dimension we used for the call center. In the action pane you add the price groups of the call center and also the channel users. Add the call center to an organization hierarchy. The organization hierarchy is required for the product assortments and delivery modes to function correctly. The organization hierarchy can also be used for reporting. Add the modes of delivery to specify which modes of delivery are available to the customer in the call center. Different modes of delivery can be specified for specific combinations of products and addresses using the path call center, set up tab, action pane, manage modes of delivery. You're able to add payment methods to the call center by specifying the payment methods customers can use in the call center. You can also specify specific attributes to the call center. You can use attributes to add descriptive characteristics to the product that the call center can offer. On assigning the channel product at which the call center, a channel hierarchy can be associated with the call center. The channel hierarchy is a component of the process that is used to add products to the catalog that are created for the call center.

2 MODULE 6: INFO CODES

In this module, we will review the key objectives of info code which includes an overview of info codes, review how to set up info codes and sub-codes, ability to assign the info codes, translation functionality, and grouping of info codes.

2.1 Info Codes overview

Let's review the capabilities of Info Code Functionality in Dynamics AX 2012. What is Info Code? Info codes provides a mechanism to capture information at a Point of Sale register.



Info code number	Description
BatGloves	Upsell Cricket Batting Glov
BATTERIES	Ask about batteries
CustCredit	Customer credit
CUSTOMER	Customer
DataPlan	Phone data plan
DATE	Expire date
DISCOUNT	Discount reason
GENDER	Gender Type
HHT-N.Adj	Negative adj. reasons
HHT-P.Adj	Positive adj. reasons
HHT-PEL	Product error log reasons
HHT-PO	Purchase order reasons
HHT-PRO	Purchase return order reas
HHT-TO	Transfer out reasons
HoldCode	Hold code
IMEA	IMEA number
IONumber	IONumber
ITEM	Item
ITMNOTF	Scan in barcode of item n
MARKDOWN	Reason for Mark Down
NUMERIC	Numeric value
PriceOverr	Price override
RETURN	Reason for Returning
SERIAL NO.	Enter any text
STAFF	Staff test
TAKEAWAY	Take-Away
TAXEXEMPT	Tax Exempt

Info code number:	BatGloves
Description:	Upsell Cricket Batting Gloves
Prompt:	Buy batting gloves with that?
Input type:	Subcode buttons

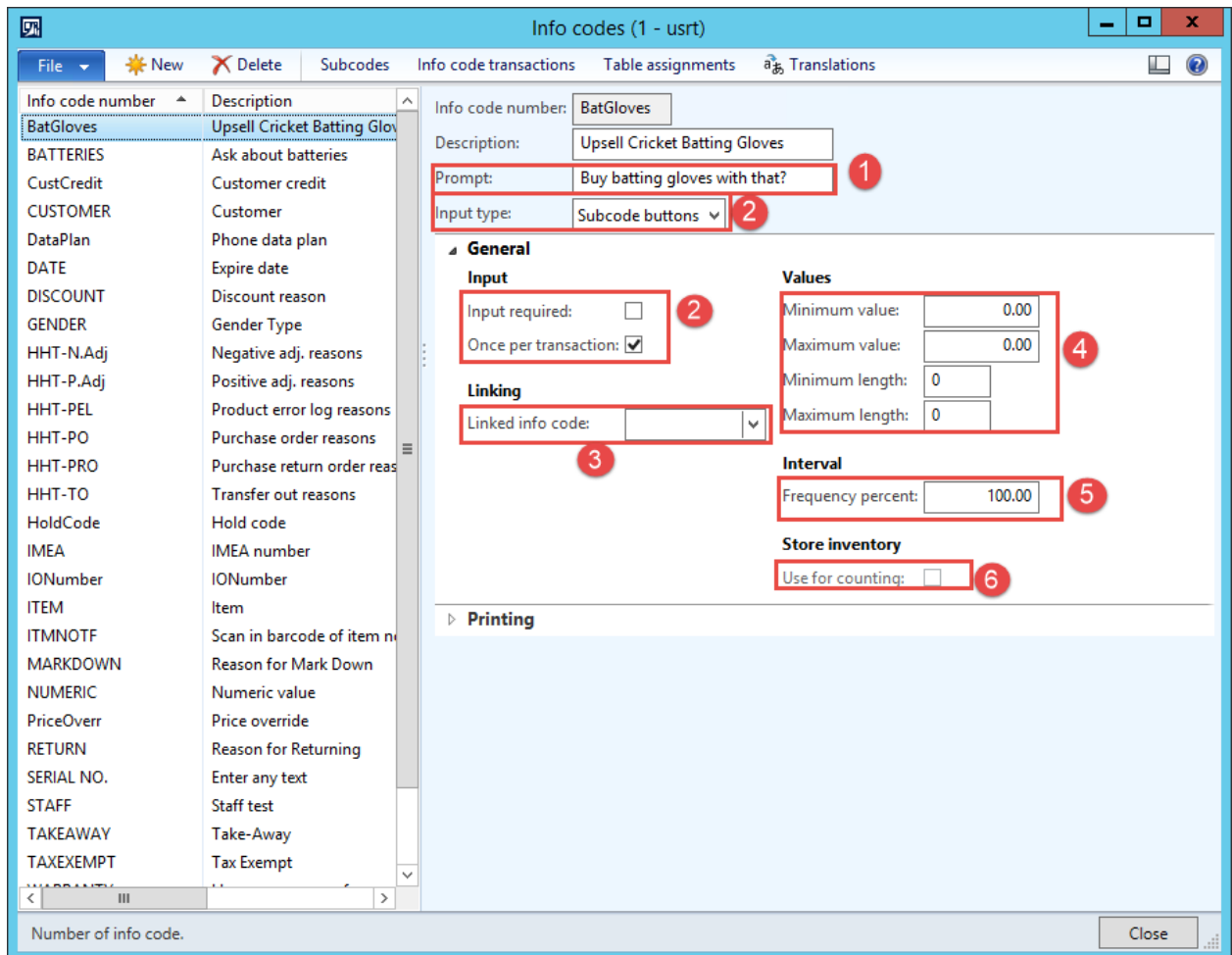
General	
Input	Values
Input required: <input type="checkbox"/>	Minimum value: 0.00
Once per transaction: <input checked="" type="checkbox"/>	Maximum value: 0.00
Linking	Minimum length: 0
Linked info code: [dropdown]	Maximum length: 0
	Interval
	Frequency percent: 100.00
	Store inventory
	Use for counting: <input type="checkbox"/>

Number of info code. Close

You can use info codes to prompt the cashier to enter information during various actions at the POS, such as item sales, item returns, or selecting customers. Examples of a simple task is to prompt the cashier to ask the customer for their zip code at the beginning or end of the sales transaction. Prompt the register cashier to select from a list of prices for specific products. This can be for specific reasons such as defective product, customer satisfaction, et cetera. Cashiers can select input from a list or enter it as a code, a number, a date, or text. When a cashier sells a product as a regular sale, discounted sale, or free product, you can make it mandatory for the cashier to capture a information code. You can assign info codes to predefined store actions, retail items, payment methods, customers, or specific pointofsale activities. These activities can be related to capture of data for -- BI analysis or some sort of survey data.

2.2 Set Up of Info Codes and Sub Codes

We reviewed the features of the info code. Now let's review the creation of info codes. In order to know how to set up a new info code, you need to get familiar with some of the key fields in the info-code setup.



The screenshot shows the 'Info codes (1 - usrt)' application window. The left pane lists various info codes, with 'BatGloves' selected. The right pane shows the configuration for 'BatGloves' with the following fields:

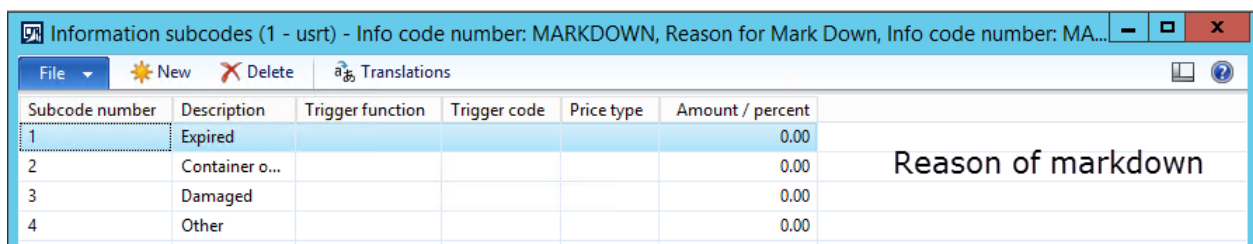
- Info code number:** BatGloves
- Description:** Upsell Cricket Batting Gloves
- Prompt:** Buy batting gloves with that? (1)
- Input type:** Subcode buttons (2)
- General**
 - Input**
 - Input required: (2)
 - Once per transaction:
 - Linking**
 - Linked info code: [Dropdown] (3)
 - Values**
 - Minimum value: 0.00
 - Maximum value: 0.00 (4)
 - Minimum length: 0
 - Maximum length: 0
 - Interval**
 - Frequency percent: 100.00 (5)
 - Store inventory**
 - Use for counting: (6)
- Printing**

Fields	Description
Prompt	The title of the action the POS user is requested to perform.
Input	Select the predefined input type, used for the validation of the data that is entered by the POS cashier, requirement and frequency of that input
Sub code	Link a subcode to an info code that prompts the cashier for input when performing specific activity
Linked info code	Select an existing info code or info code group to associate with this infocode
Values	Set the minimum of maximum numeric of text values
Frequency percent	Set the frequency that the prompt for a reason code appears
Use for counting	Select the checkbox if the reason code can be used for counting

- Prompt - enter here the text that is displayed on the point of sale, POS, register to prompt the cashier to ask about something or enter an info code. For example, ask the customer whether he or she would like to buy batteries for the new equipment

- Input: Input type - we have the following options for requesting and giving the input:
 - None: A prompt on POS as a text box. The cashier can either input any text in the field or save the transaction with a blank reason code record.
 - Subcode list: Prompts and calls the function as it is defined in the trigger function field that is on the subcode form. You should select this option if there is prompts and the call numbers are more than five. The function appears as a list.
 - Date: A prompt to enter the date. The date format is MM/DD/YY.
 - Numeric: A prompt to the cashier for numeric data input. This value is not displayed on POS. He or she is just giving numeric input, kind of control number. However, the value is saved in the database. The value attaches a number to an item that is sold on POS.
 - Item/Customer: The POS cashier must select an item or a customer that is displayed on POS. However, this item or customer must be stored in the database as information for that record.
 - Staff: Similarly, cashier is prompted to enter the cashier staff ID.
 - Text: A prompt for input of a simple information text message.
 - Subcode buttons: Prompts and calls the function as it is defined in the trigger function field on the subcode form.
 - Age limit: Enter an integer that represents the age that is required for a customer to purchase an item, to remind cashier about age limitations.
- Input Required:
 - Input: We can define whether the input is required and if once per whole sales transaction will be enough, in opposite to each sales line.
- Linked info code: If a product requires combination of two info codes, you can link them, but more efficient way is to use info code group, which we will discuss later on.
- Values: Set the minimum or maximum numeric value that the cashier can enter in response to the prompt for an info code. So this is applicable for the info code of input type "Numeric." You can also set a minimum or maximum number of characters for info codes that require text input. So this is applicable for the info code of input type "Text."
- Frequency percent: For example, you want the cashier to ask for the customer's ZIP code before the start of every transaction. In this case, set frequency percent to 100. We briefly touched on sub codes.

Now let's review the creation of the sub codes. We are reviewing how to set up an info code so that multiple subcodes are displayed either in a list or as a button. In general, subcodes are used to present the point-of-sale operator with a list of available responses. A subcode triggers specific actions. The actions depend on the info code that the subcode is assigned to. For example, you could set up a subcode to remind staff to register information about reasons of markdown,



Subcode number	Description	Trigger function	Trigger code	Price type	Amount / percent
1	Expired				0.00
2	Container o...				0.00
3	Damaged				0.00
4	Other				0.00

Reason of markdown

or remind to offer additional sale, example, batteries,

Subcode number	Description	Trigger function	Trigger code	Price type	Amount / percent
1	Yes, thank you	Product		Percent	10.00
2	No				0.00

Upsell batteries

or to select the subcode when the cashier is putting order on hold.

Subcode number	Description	Trigger function	Trigger code	Price type	Amount / percent
Address	Address not valid				0.00
Confirm	Waiting for con...				0.00
Email	Email address n...				0.00
Phone	Phone number ...				0.00

Putting on hold

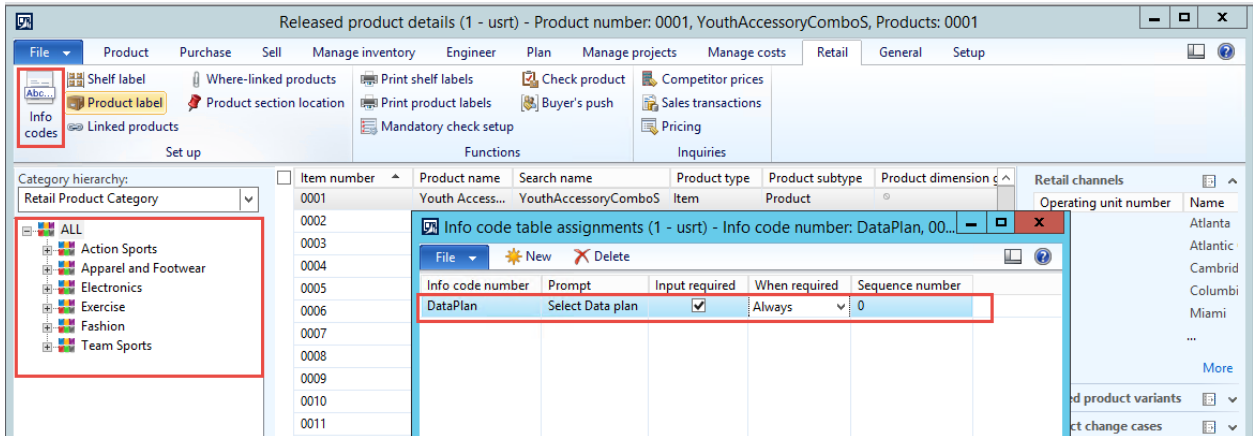
You can use subcodes also with internal transactions, like transfers between stores/warehouses. POS operator would have to give transfer reasons. The actions that are triggered by a subcode depend on the criteria that you enter for the subcode. For setting up subcodes, we will explain some of the key fields which are required for a setup.

Fields	Description
Description	The description of the subcodes
Trigger function and Code	Select whether a product or a info code triggers the action and specify particular values
Price type	Select a price type from drop-down list
Amount/Percent	Enter proper value.

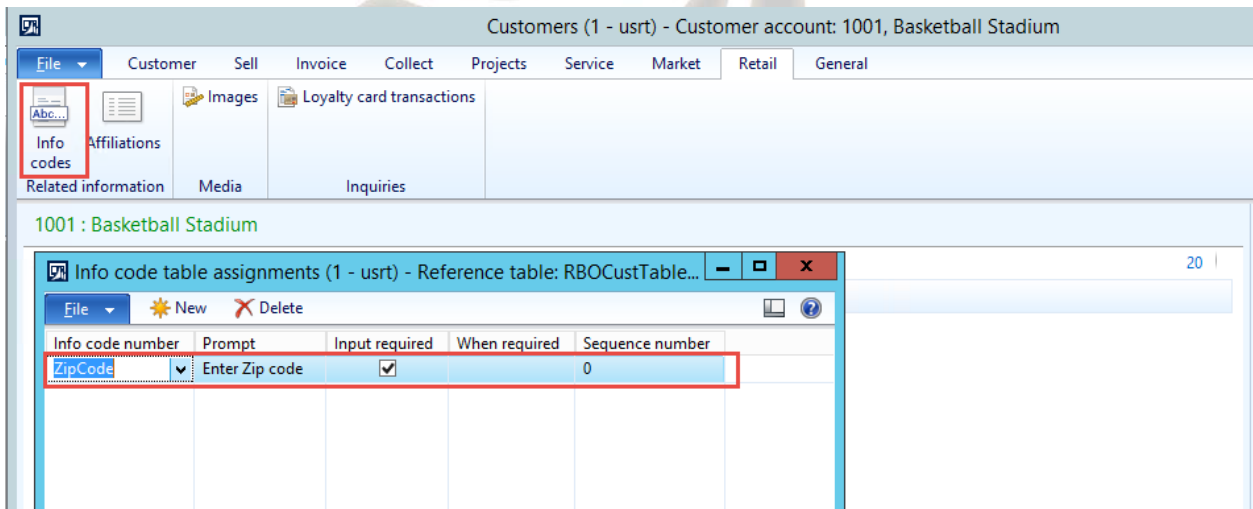
- **Description:** A description should include all the options that are available in the subcode so that the operator would have clear situation. The selected value among these options is taken as the input for the info code trigger.
- **Trigger functions:** Select an option that is responsible for taking action if any action is needed. Choose from product or info code. Example: If your action will be triggered by product, give the product number. If by info code, give proper info code or the info code group.
- **Price type:** Select the type of price that is charged if it originates from a product. The charged price is taken from the Price/Discount tab on the retail items form in the trade agreement or is a designated price.
- The price will be specified in the amount/percent field, or is a price that is reduced by a discount percentage. The discount percentage will be specified in the amount/percent field. Let's review the price type setup and the related triggers. Depending on what you chose in price type, you enter the amount or the reduction percentage. This percentage reduces the sales price from the retail items form. For example, you can set up that whenever a customer is buying batteries, the customer receives 10 percent discount.

2.3 Assigning Info Codes

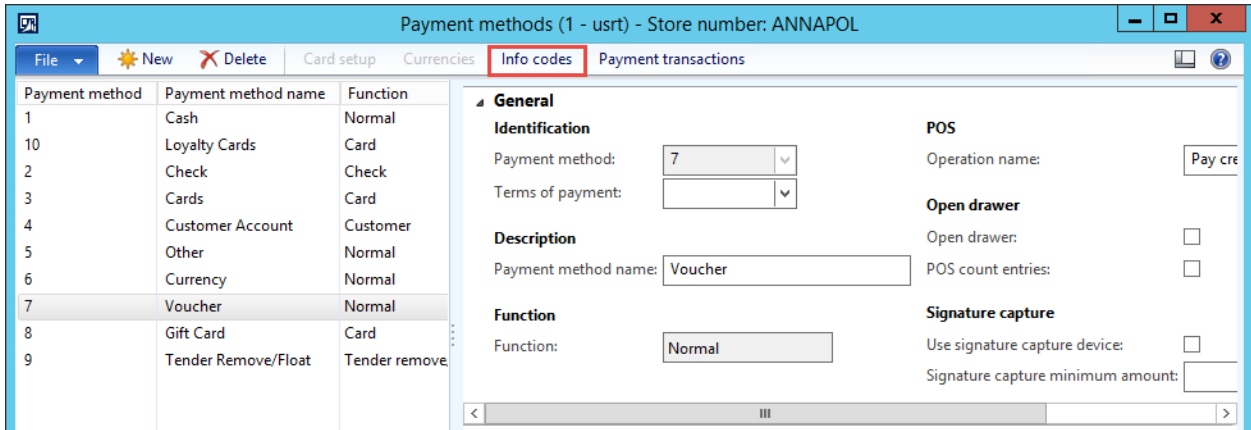
Let's review the assignment of the info codes. The info codes can be assigned to the products, customers, payments, payment methods, and functionality profiles. Let's explore each one of them. First one is products. By assigning info codes to product, you can, for example, prompt the POS operator when the product is added to sales transactions about additional sale, up sale.



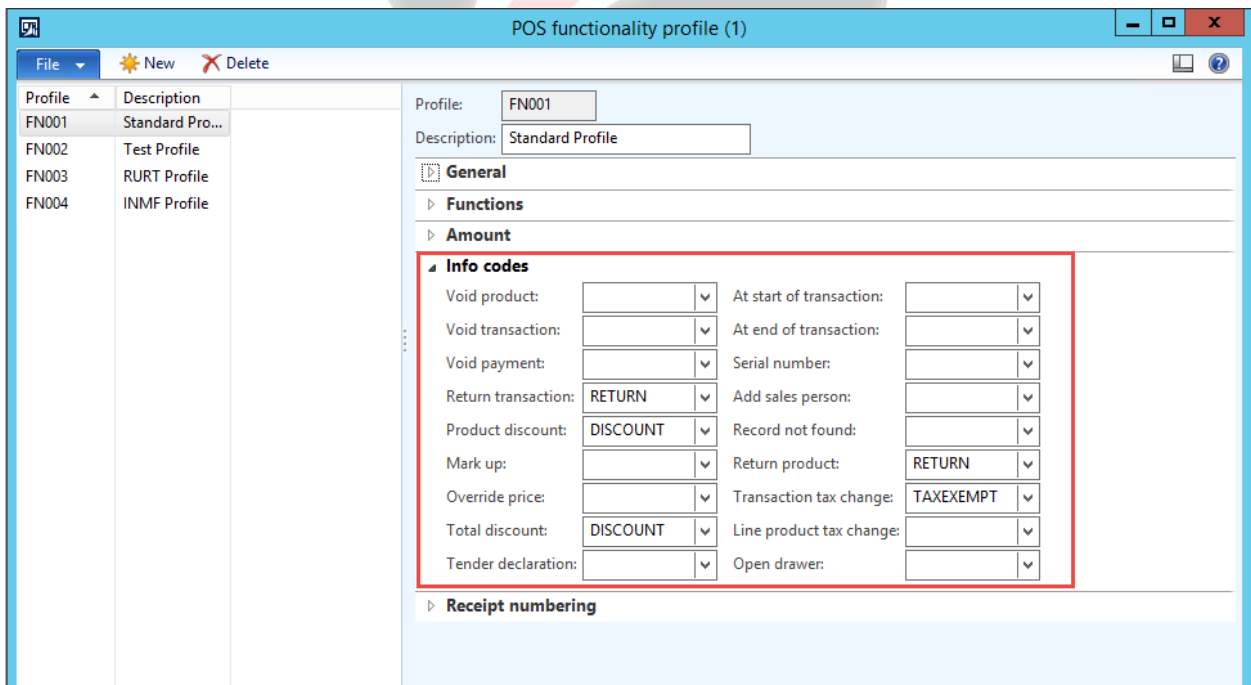
Second one is customers. Thanks to this cashier can be asked to verify delivery address for named customer.



Payment methods. You can set this to remind cashier that when paying by voucher, there is no giving change.

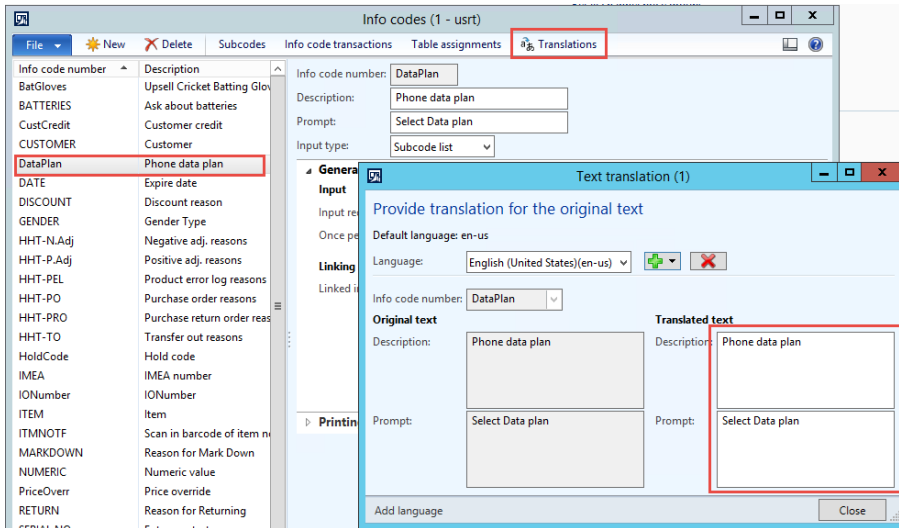


Finally, functionality profile. There is a large list of predefined trigger actions to which you can freely assign info codes. For example, assign code to opening a drawer or voiding the payment.



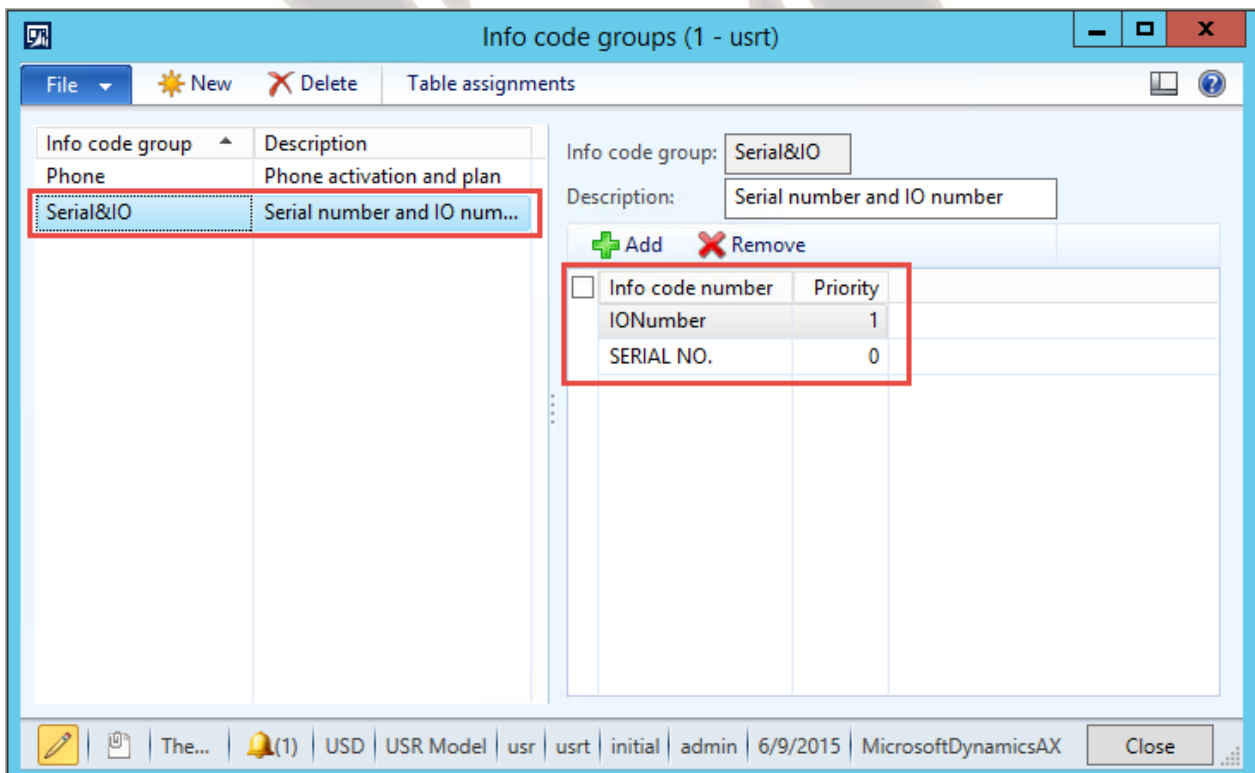
2.4 Translation of Info Codes

Let's review the capabilities of translation of info codes. If you work in multi-language environment, you can create language-specific descriptions for the info codes. Translated info code descriptions. Translated descriptions are also available for subcodes. Once the translation setup is done in the info codes and subcodes, the specific description and the prompt and specific language will be available to the POS user. For this to happen the POS user, worker, language has to be set. Based on this, the user will see the labels and the prompt text on the POS terminal in specific to his or her language.



2.5 Grouping of Info Codes

Let's review on how to group info codes. In Microsoft Dynamics AX 2012 R3, you can create groups of info codes. Info code groups add flexibility by enabling you to define fewer info codes and then use them in more adaptable ways.



Except for just grouping, you can also specify the order in which info codes are displayed to the user without manually creating dependencies between them. You can use info code groups in the following ways or reasons. Reuse: Define fewer info codes and easily reuse them. Info codes that are included in info code groups have no predefined dependencies on other info codes. You can include the same info code in multiple info code groups and then use prioritization to present the same info codes in order that makes sense in a particular situation. For example, you can create the info code such as asking for batteries. You can use this info code group assigned to remote

where you will also ask about product warranty. Then you can reuse this info code in group connected to other product, where except for batteries, you will ask about ZIP code. Link: Link info codes to other info codes or info code groups to gather information about a product or transaction in the way that you need without having to define a separate info code or linked info code for such scenario. For example, you can set up info code groups to track information about mobile devices, to a certain extent common, but also slightly different for mobile phones and tablets.

2.6 Module Review

In this module, we reviewed the feature of info codes and the purpose of utilizing the info codes. We then reviewed the setup of the info codes and the subcodes with the understanding on how to use these info codes in transactions at the store.

Examine info codes creation	Explore how to set up the subcodes	Understand the use of the info codes	Assign the info codes	Describe the translation features.	Understand the info codes grouping
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We then reviewed how to assign the info codes against products, customers, payment methods and functionality profiles. We reviewed the translation capability feature and reviewed the grouping of info codes. This concludes the review of info codes.

3 MODULE 10: RELEASED PRODUCTS AND CATALOGS

3.7 Add and Update Product Attributes for Retail Channels

You can use product attributes to add merchandising details, such as rich text, images, and videos to the descriptions of products that you offer in your retail stores or in product catalogs. By adding merchandising details to products, you can provide the product information that your staff needs to better serve the customer. Product attributes can be applied to products even if they are not included in a retail product catalog.

You can add or modify product attributes for individual products, categories of products, or for all stores that are assigned to a selected category. You can also bulk edit product attributes by using Microsoft Excel.

Click **Retail > Common > Retail channels > Retail stores**. In the Retail stores list, open a retail store.

–or–

Click **Retail > Common > Retail channels > Online stores**. In the Online stores list, open an online store.

–or–

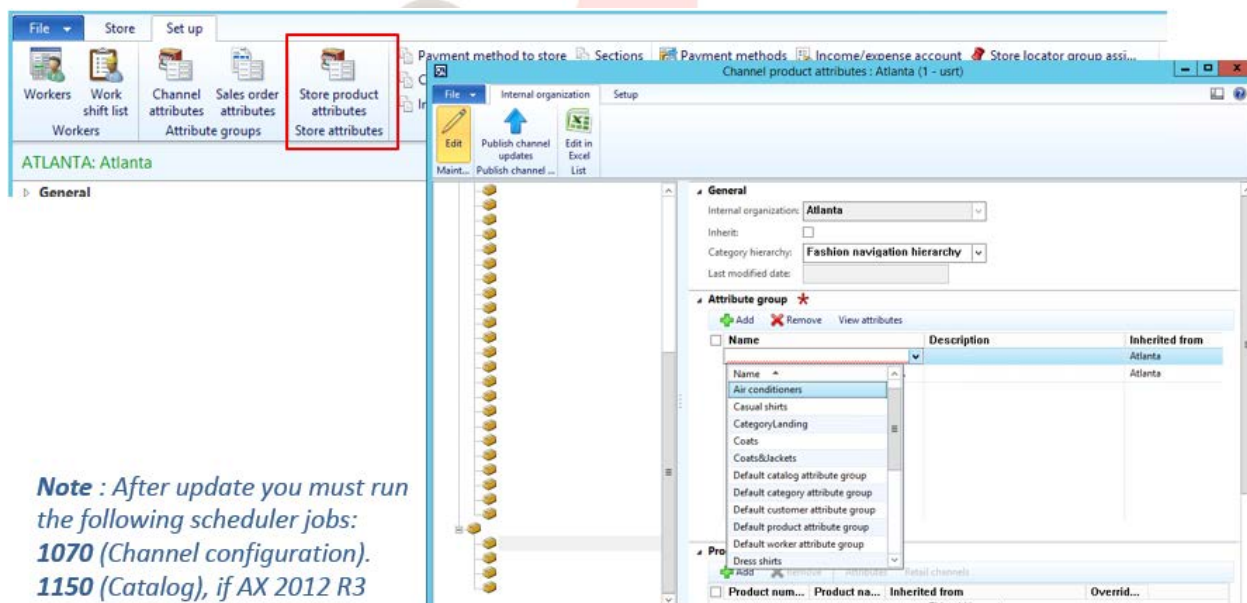
Click **Retail > Common > Retail channels > Call centers**. In the Call centers list, open a call center.

In the form that opens, on the Action Pane, on the Set up tab, click Store product attributes.

In the Channel product attributes form, click Edit.

In the left pane, select the store that you want to add product attributes to send the updated product attributes to stores. You must run the following scheduler jobs:

- **1070** (Channel configuration).
- **1150** (Catalog), if AX 2012 R3 is installed and a retail product catalog is assigned to the retail store.



4 MODULE 13: BAR CODES AND LABELS

4.6 Overview of Labels

In Retail, you can generate and print labels to use in stores. A label is a piece of paper, polymer, cloth, metal, or other material that is attached to a product, a container, or a shelf. A label can also be printed directly on a container or an item. Retail offers two types of labels:

- Product labels
- Shelf labels

Product labels are always specific to a particular variant, but shelf labels don't have to be.

You can use labels for a variety of purposes, such as the following:

- Product identification
- Name tags
- Bar codes
- Pricing

- Warnings
- Batch numbers
- Expiration dates

In addition to being able to generate labels for one product at a time, you can now generate product and shelf labels for multiple products at one time. You can also generate labels for products that are included in transfer orders or purchase orders. After the labels are generated, you can print them.

Generate product and shelf labels for products in the following scenarios:

- From purchase orders, regardless of the purchase order status
- From transfer orders when the products are shipped or when transfer orders are received
- From the Released products list page or the Released product details form

When you generate labels in these scenarios, you can use the Print shelf labels form and the Print product labels form to specify the number of labels that you want to print. You can also add products to the list and generate labels for those products at the same time.

Labels Overview



Product Labels



Shelf Labels

4.7 Product Labels

A product label contains all the information about the product, including the batch number, serial number, and expiration date. When you work with labels in Retail, you can do the following:

- Create labels for products for which the price or comparison price has changed in a store
- To set up Retail to create product labels when prices change, you must assign product label reports to the relevant retail products
- The product label reports provide the information that Retail needs to print the labels.
- You must set up product label reports no matter what version of Microsoft Dynamics AX 2012 you are using.

- Create product labels manually, either for one product at a time or for categories of retail products.

In AX 2012 R3, generate product label files for multiple products at the same time.

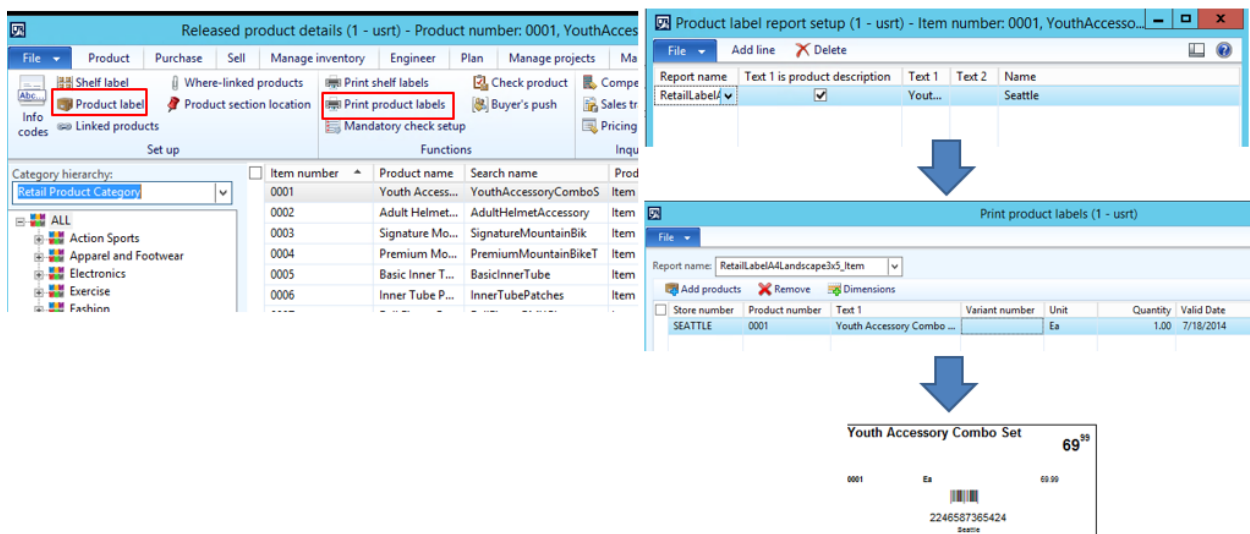
Select a specific size for the product labels that you print.

Reprint labels at any time.

In AX 2012 R3, in addition to generating labels for one product at a time, you can now generate product labels for multiple products at the same time. You can also generate labels for products that are included in purchase orders or transfer orders, and for released products. You can generate labels for one or more products at the same time from any of the following forms:

- Create labels for products for which the price or comparison price has changed in a store
- To set up Retail to create product labels when prices change, you must assign product label reports to the relevant retail products
- The product label reports provide the information that Retail needs to print the labels.
- You must set up product label reports no matter what version of Microsoft Dynamics AX 2012 you are using.
- Create product labels manually, either for one product at a time or for categories of retail products.

Product Labels



The image illustrates the workflow for generating product labels in Microsoft Dynamics AX 2012 R3. It shows three main components:

- Released product details (1 - usrt) - Product number: 0001, YouthAccess...**: This window displays a list of products. The 'Product label' and 'Print product labels' options are highlighted in the ribbon.
- Product label report setup (1 - usrt) - Item number: 0001, YouthAccesso...**: This window allows for configuring the report. The 'Report name' is set to 'RetailLabelA4Landscape3x5_Item', and the 'Text 1' field is populated with 'Youth Accessory Combo Set'.
- Print product labels (1 - usrt)**: This window shows the report configuration, including the 'Report name' and a table of product details.

The final output is a printed label for the 'Youth Accessory Combo Set' with a price of 69.99. The label includes the product number 0001, the unit 'Ea', and the price 69.99. A barcode is also present with the number 2246587365424.

5 MODULE 17: PRICING AND DISCOUNTS

5.2 Category and Product Pricing

Let us now review the retail category and product pricing in Microsoft Dynamics AX 2012 R3. Price adjustments and discounts can be applied to products, variants or retail hierarchies. If more than one discount applies to a product, a customer may receive either one discount or a combined

discount. Microsoft Dynamics AX for Retail automatically applies the discount or combination of discounts that gives the best price to the customer.

Before you set up a price adjustment or a discount, confirm that the price groups are assigned to the correct stores. Also if you want to automatically generate the discount ID, you can set up number sequences in the retail parameters form before you define a new discount or price adjustment.

The pricing service that provides the best price and discounts for products in retail parts also provides the best discount and price for products that are offered in the online store. When a catalog is created and published, the pricing service is automatically turned on. The catalog products and their prices are published to online store. The prices that are displayed for the products are determined by using the product trade agreement and any available price adjustments for the products. Any available discount for the products are calculated and displayed after the product is added to the shopping cart at checkout time.



The concept of best price is illustrated in this example where there is a base sales price for the product at \$9. And a trade agreement with sales price is defined at \$10. After that, if there is a price adjustment to the adjustment, product price will be then based on the price adjustment which in this example is \$1.08. Any discount defined will be calculated based on \$1.08.

Dynamics AX has the functionality of calculating the base available price and discount for customers on the runtime. When a customer views the product in the online stores and adds the product to the shopping cart, the price is automatically updated to reflect any price adjustments or additional discounts. When the customer selects the product for purchase, the final price is calculated for the product at that point of time.

Based on the best calculated price available to the customer with the combination of products selected in the cart. Category pricing rules allows you to manage the prices of many products at the same time by using the pricing rules and price groups that affect the entire categories of the product. This is especially useful if your company has many retail products. You can specify a

markup margin or fixed amount for the products in one or more categories, and then generate a price or discount agreement journal for sales price. You can also limit the selected product to specific price groups and vendors.

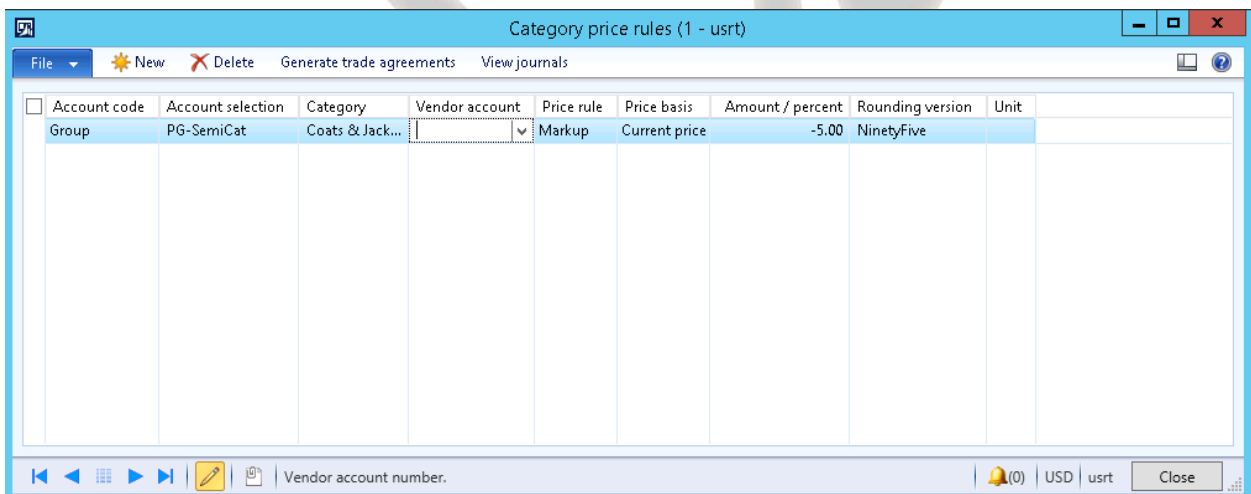
In the price rule field, select which type of price change to use.

- Markup. A percentage of the price bases is used to calculate the sales price. Example, a product that costs \$ten and sells for \$15 has a markup of 50 percent.
- Margin. A percentage of the sales price that is used to calculate the amount of profit. Example, a product that costs \$10 and sells for \$15 has a margin of 53.3 percent.
- Fixed amount. An amount added to the price basis that is used to calculate the sales price. Example, a product that costs \$10 and sells for \$15 has a fixed amount of \$5.

In the price basis field, select the type of price to modify.

- Base cost. The amount that the retailer paid to the supplier.
- Base price. The sales price before trade agreements and price adjustments are applied.
- Current price. The sales price after trade agreements and price adjustments are applied.

The results of the proposed changes are displayed as an unposted price adjustment, unposted price and discount agreement journal, so you can modify them before you make the changes final and post it. To set up the categories pricing rules, navigate to retail, periodic, category pricing rules.



Account code	Account selection	Category	Vendor account	Price rule	Price basis	Amount / percent	Rounding version	Unit
Group	PG-SemiCat	Coats & Jack...	[dropdown]	Markup	Current price	-5.00	NinetyFive	

In the category price rules form click new to create a price rule. In the account code field, select group and then select a price group in the account selection field. In the category field, select a category at any level from one of the retail category hierarchies. To price only the products from a specific vendor, select a vendor in the vendor account field. In the price rule field, select which type of price change to use. In the price basis field, select the type of price to modify. In the amount or percent field, enter a percentage or an amount of price change. In the rounding version field select a rounding method. To price for a specific unit, measure, select a unit in the unit field. If this field is left blank, the products default unit of measure is selected. Click generate trade agreements. The pricing, category pricing rules can also be created through a wizard-driven method.

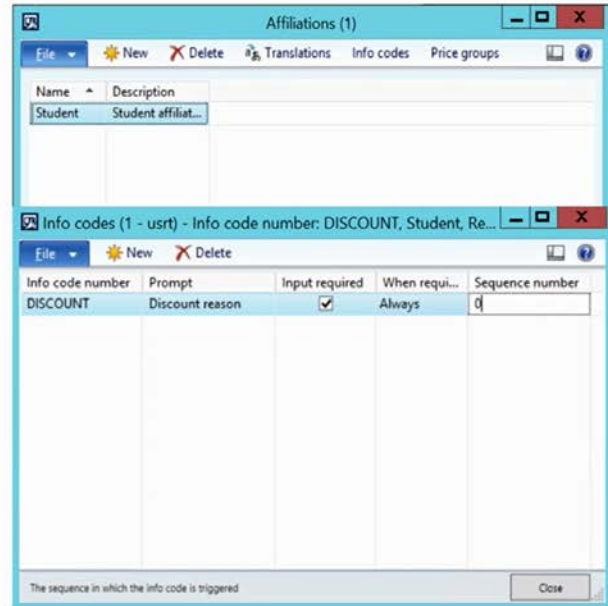
5.4 Affiliation Pricing

Let us now review the affiliation pricing in Microsoft Dynamics AX 2012 Retail R3.

Affiliations are used to define various retail customer affiliations or classifications to whom retail channels wants to offer special discounts in order to capture more business.

Affiliation

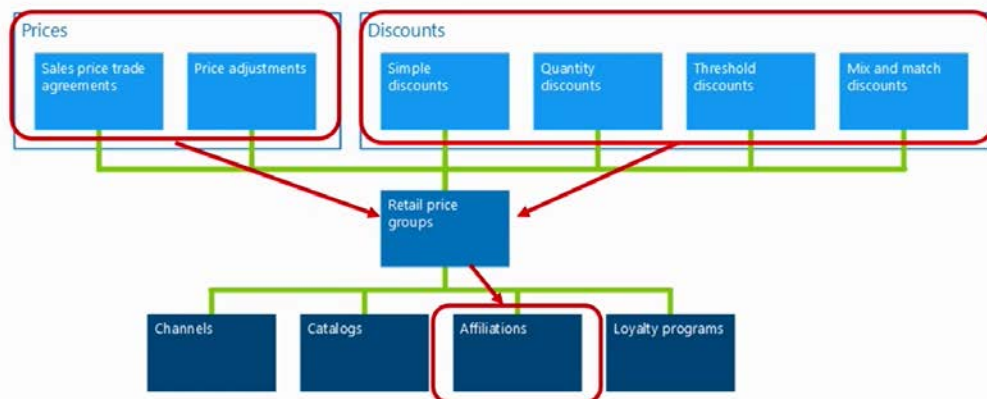
- Offers special discount to various groups or classification of customers.
- Affiliation can be used with threshold discounts and other promotions & discounts.
- Info codes can be used to get discount reasons.



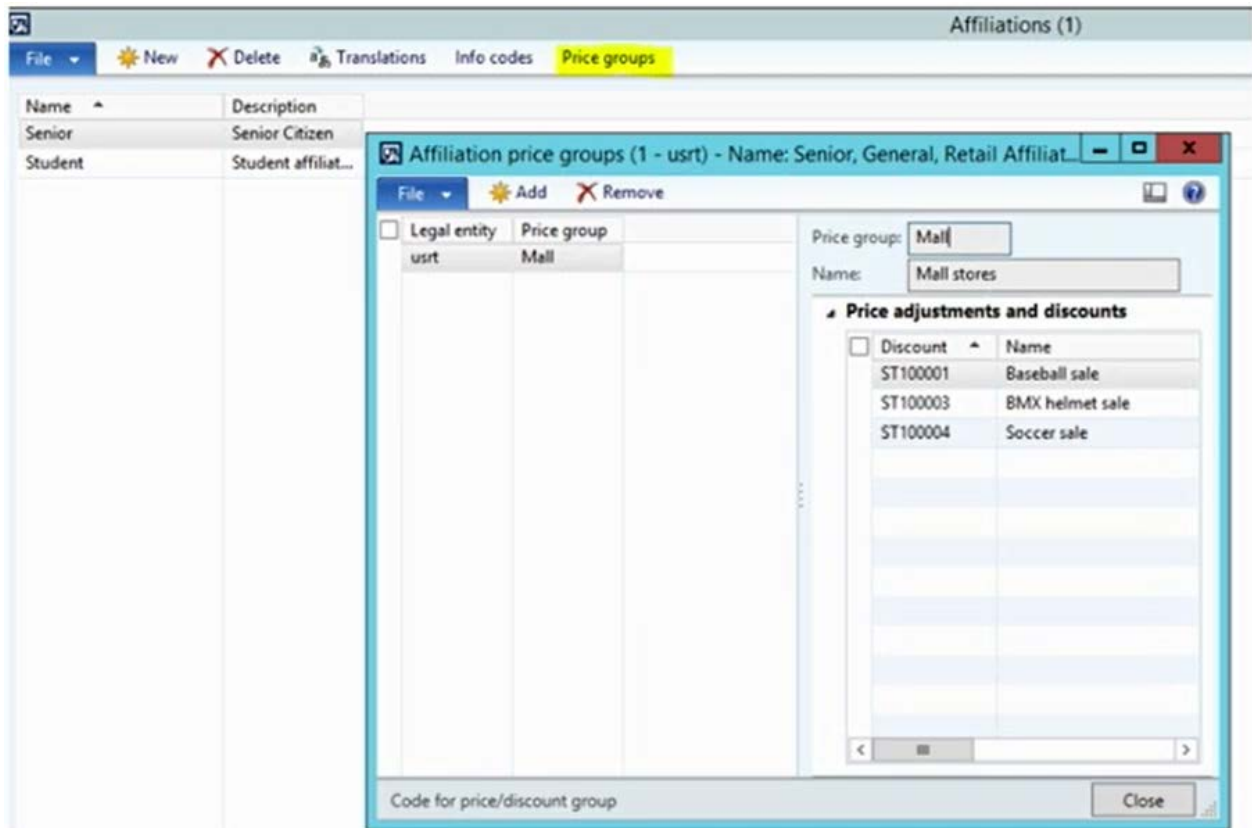
This is useful if your retail stores give discounts to customers who are students or seniors or customers who are affiliated with organizations that your company gives discounts to.

The affiliations that are created can be used with special discounts, simple discounts or quantity discounts or simple discounts. For example, retail channel wants to offer discounts to youth and coaches in sports leagues to try and capture more business when various sports seasons starts.

Affiliations are linked to customer accounts which decides the affiliation price to be applied if the customer shops at store. To set up affiliation and their discounts, follow these steps:



Prerequisite for setting up affiliation is to set up price group. Price group setup has been discussed in detail. In the price and discount group setup module. To create an affiliation, navigate to retail, set up, pricing and discounts, affiliations.

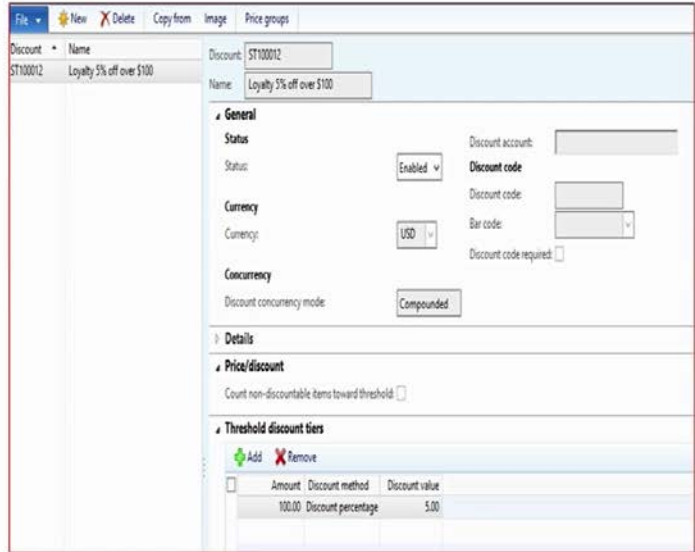


In the affiliations form, click new and enter a name and description for the affiliation. Click price groups. In the affiliation price groups form click add in the price group column select the price group. Close the affiliation price groups form and close the affiliation form. Create a discount for the affiliation. In the discount form on the action strip click price group. Close the price group form. The discount is now linked to the affiliation through the price group.

5.6 Discounts Overview – Threshold only

The last type of discount that we will review is threshold discount. A threshold discount is also called as an amount-based discount. A threshold discount is a discount that is given to the customers when the total for a transaction reaches one or more specified amounts.

- Discount Amount
- Discount Percentage



For example, you could create a discount that gives a 10 percent discount for purchases over \$100 and a flat \$25 discount for totals over 200. For setting up a threshold discount navigate to retail common pricing discounts, threshold discounts. In Microsoft Dynamics AX 2012 R3, to link price groups to threshold discount, click on price groups and select the corresponding price group. On the price or discount FastTab, select the count nondiscountable items towards threshold box to include any nondiscountable products on a transaction when calculating the discount. On the threshold discount tiers FastTab, create one or more thresholds to trigger the discount. For each threshold, click add and enter an amount, select a discount method and enter, and then enter a discount value either as an amount or a percentage. For example, you could create one tier to give a 15 percent discount for transaction totals over \$200 and another tier to replace the 15 percent discount with a flat \$75 discount for any purchase over 500 dollars.

6 MODULE 20: LOYALTY MANAGEMENT AND GIFT CARDS

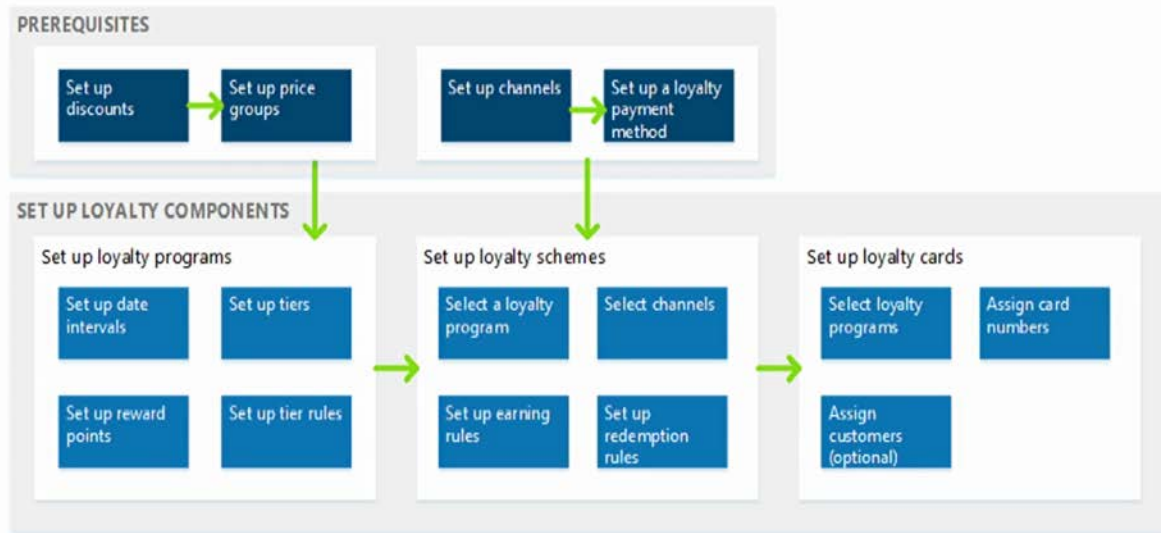
In this module we will review the knowledge and skills required to manage loyalty and gift cards in Dynamics AX 2012. The module objectives are loyalty overview, explore the setups of loyalty, review how to manage loyalty transactions, gift card overview, gift card setup, review how to manage gift cards.

Loyalty overview	Loyalty program setup, loyalty points, schemes and cards	View and manage loyalty transactions	Gift card overview	Gift card setup	View and manage gift card
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6.1 Loyalty Program Overview

Let us now review the loyalty program functionalities in Dynamics AX 2012.

Loyalty Program Overview



A loyalty program can help increase customer loyalty by rewarding customers for buying products in your retail stores. In Microsoft Dynamics AX 2012, you can set up simple or complex loyalty programs that apply across your legal entities in any retail channel.

This module introduces new loyalty features that will be available in Microsoft Dynamics AX 2012 R3. In Microsoft Dynamics AX 2012, users have the ability to create loyalty schemes and customers to accumulate loyalty points. In Microsoft Dynamics AX 2012 R3, the loyalty functionality has been enhanced by adding the following functionalities:

- Multiple tier qualifying criteria over flexible periods to achieve loyalty status.
- Activities that can accumulate points or status.
- Ability to add customer loyalty card at the retail channel.
- The ability to manually adjust card reward points.

Before we start reviewing the setup of loyalty program, let's understand some of the prerequisites required for loyalty program.

Pre-requisites	Description
Setup of loyalty date interval	Loyalty date interval is used to create periods to qualify for the tiering system used in loyalty program. These periods set the start and end date for a tier status to configure that tier's duration.
Setup of channels	Channel needs to be set up prior to setting up of loyalty as this would enable linking of channel to the loyalty schemes.
Setup of retail price groups	Retail price groups will enable the feature of loyalty specific pricing and offer.
Setup of loyalty parameters	These are default parameters for the loyalty.

To create and manage loyalty, follow these steps. First step is to set up the loyalty program and tiers for the program. Second step is to set up the loyalty points. Third step is to set up the loyalty scheme. And the last step is to create loyalty cards to be issued to the customers.

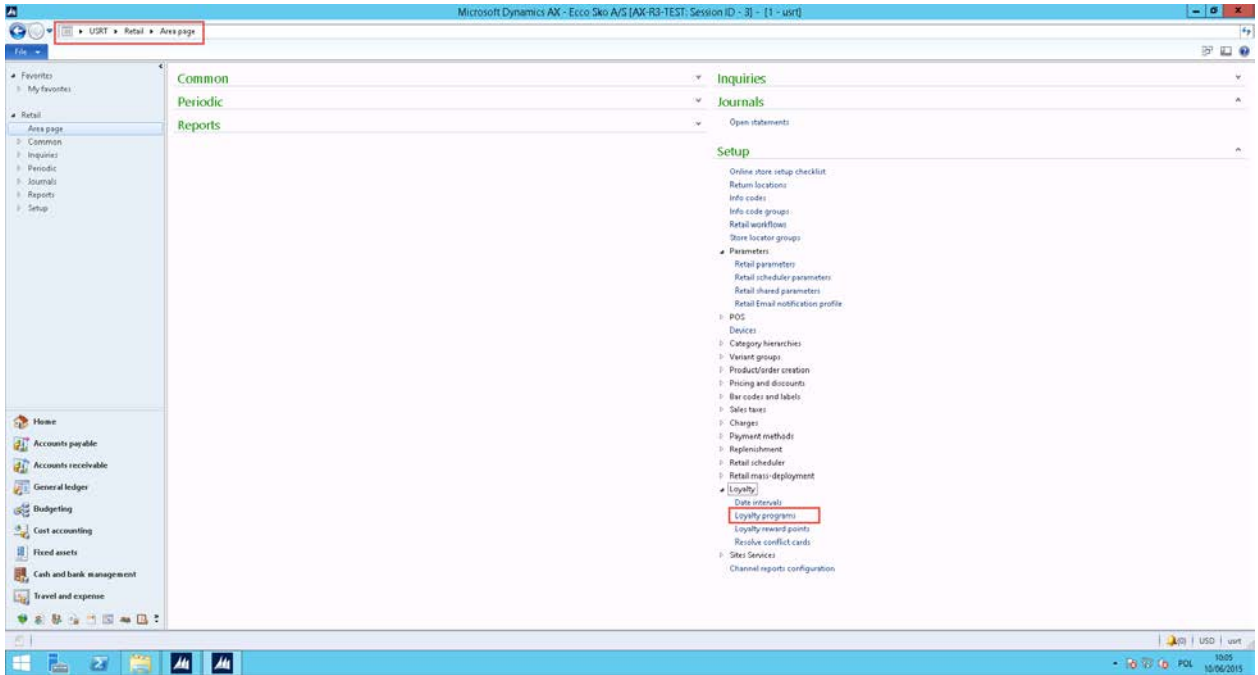


6.2 Setup of Loyalty Program

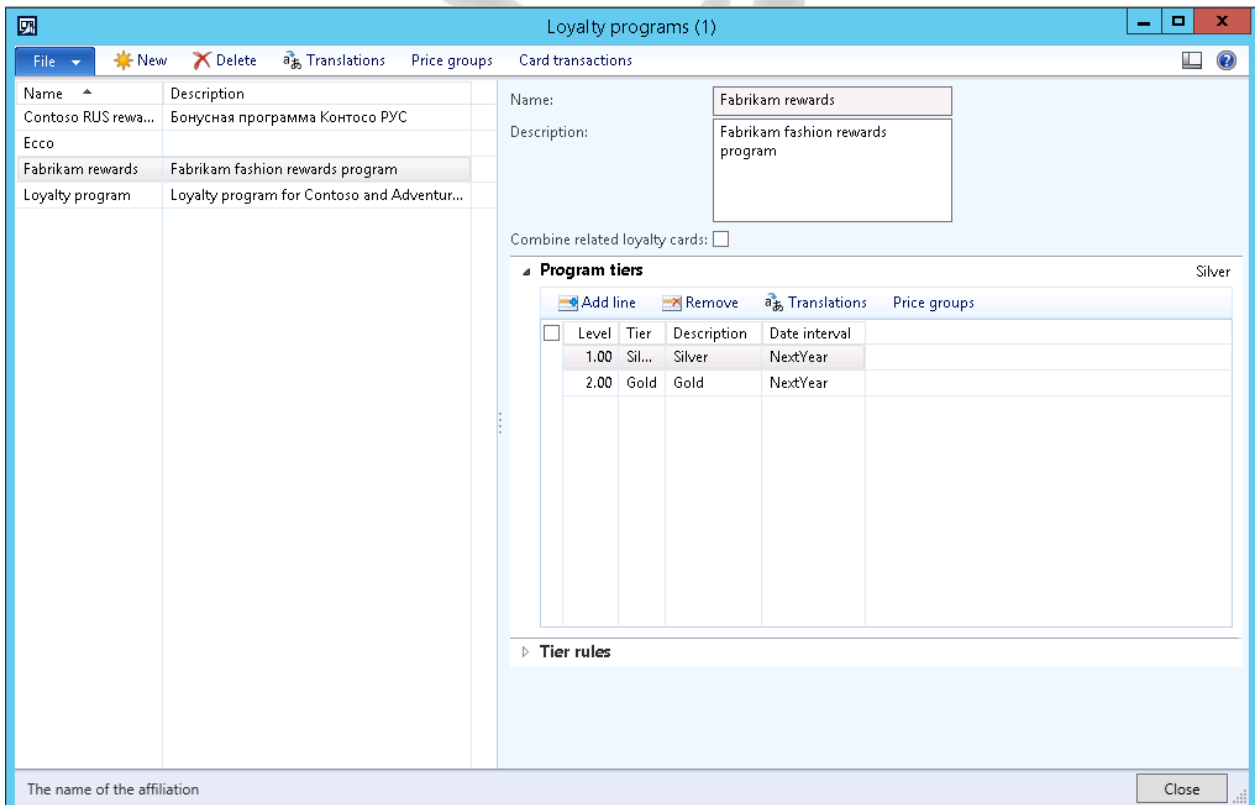
Let us now review how to set up a loyalty program in Dynamics AX 2012. Loyalty programs are structured marketing efforts that reward and therefore encourage loyal buying behavior, behavior which is potentially beneficial to the firm. In Microsoft Dynamics AX 2012 R3, loyalty program and tiers connects the various components that are required to set up a loyalty plan for your organization.

Loyalty program connects the different components in the following ways. Assign price groups to loyalty programs and program tiers to identify which discounts or special pricing your participants can qualify for. This enables the customer participating in the loyalty program to avail special prices and discounts. Assign loyalty schemes to loyalty programs to identify the earning and redemption rules that apply to the program. Assign the retail channels to the loyalty scheme to identify the participating retail stores in this loyalty program.

Now let's look at the process of creating loyalty program and tiers. To access the loyalty reward points for setup, click retail, click setup, click loyalty, and then click loyalty programs.

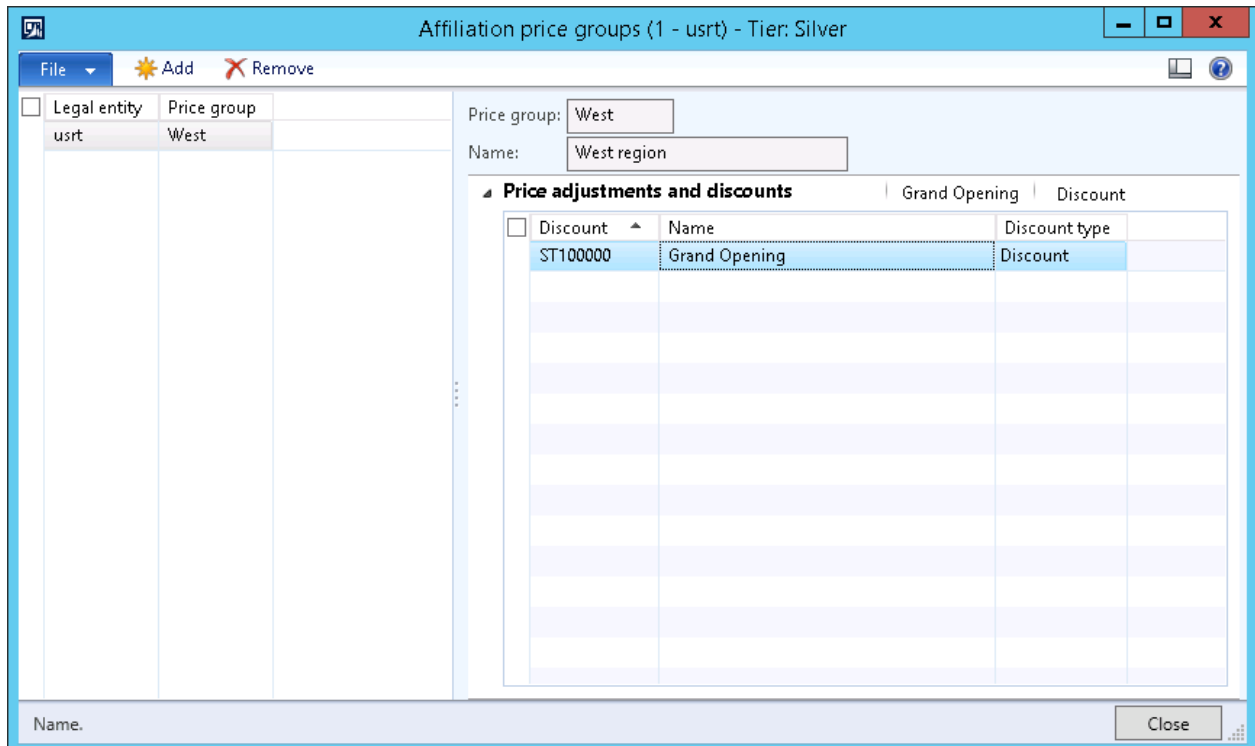


This form is new in Microsoft Dynamics AX 2012 R3 and used to create various loyalty programs with special tiers and rules for earning those tiers. Once you open the loyalty reward points form, you will need to create new loyalty point records.



Click new. In the name field, enter a name for this loyalty program and the description. Enter the description. In the program tiers section, add a new line. In the level field, enter a number value to define the order of the level, 1 being the first tier that a customer could earn. In the tier field, enter a name for the tier status. For example, gold, silver, et cetera. In the description field, enter a

description of the tier. And in the date interval field, select a date interval from the dropdown menu to define how long a customer's membership will be valid in this tier. Select a price group to assign the price group with specific discounts and pricing that will be available to a customer who obtains this tier status.

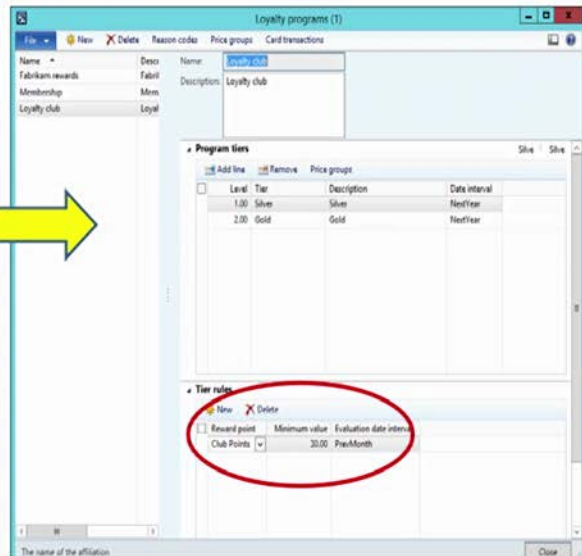


Tiered loyalty programs offer different reward based on a shopper's status, which is based on stopper's status, which is most often determined by how much the customer shops throughout the year. One of the examples that we're going to see for this tiers status is to create a loyalty program that has a silver tier status that is good for one year and earned by having 30 points in the last month. Create a new loyalty program with a silver program tier set with a date interval for next year. Configure the tier rules for in order to earn this tier with a minimum value of 30 points and an evaluation date of previous month, as shown on the screen.

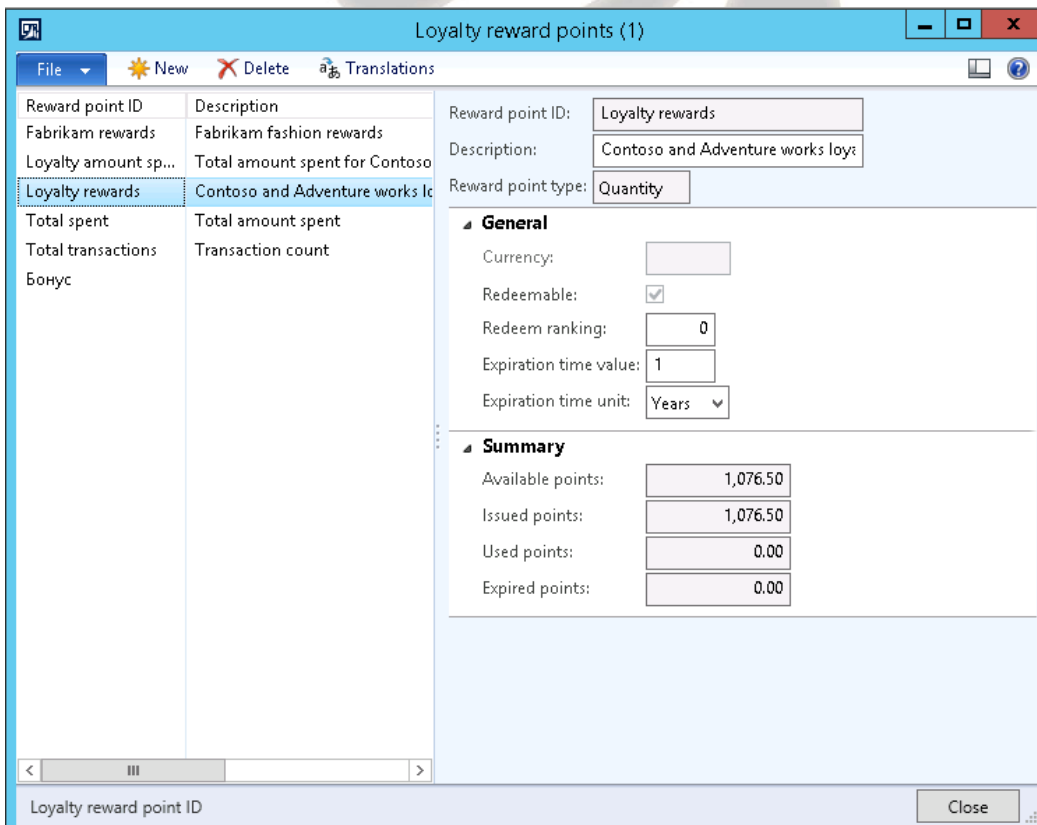
Setup Loyalty programs & tiers

Loyalty program & tiers

Example: To create a Loyalty program that has a Silver tier status that is good for 1 year and earned by having 30 points in the last month; create a new Loyalty program with a silver program tier set with a Date interval for Next Year. Configure the Tier rules for in order to earn this tier with a minimum value of 30 points and an Evaluation date of Previous Month.



The loyalty reward points are used to create or define the retail loyalty point structure for the organization. It helps to maintain or store the loyalty points accrued or redeemed by the loyalty customers. To access the loyalty reward points, the path is retail, setup, loyalty, loyalty reward points.



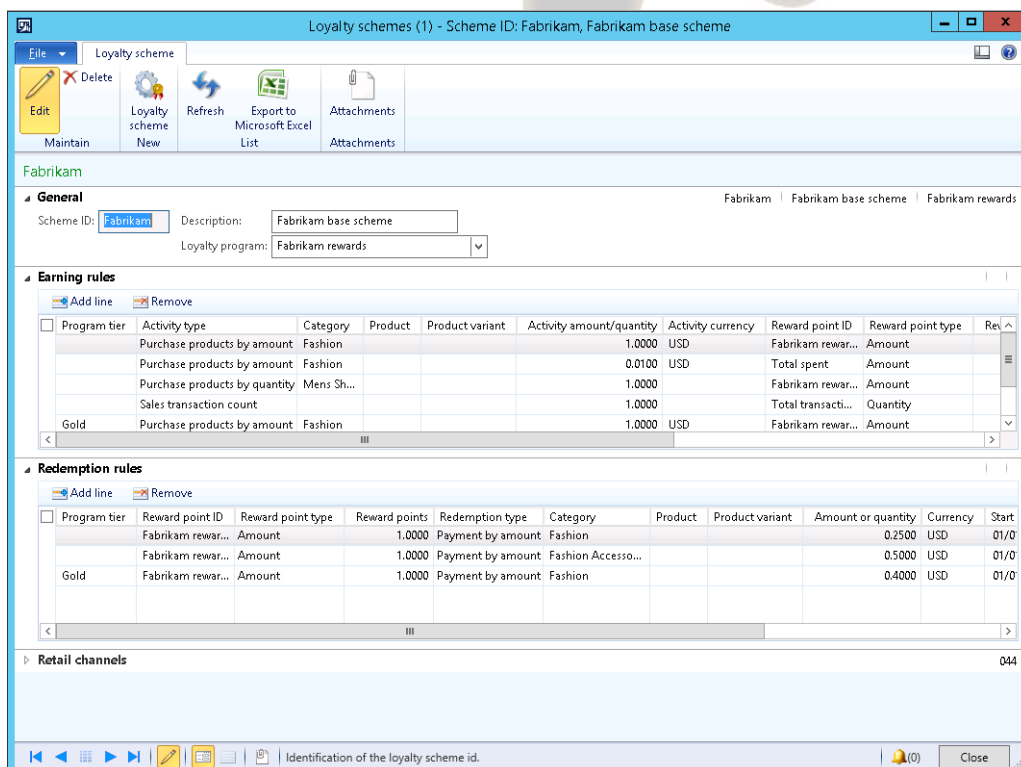
This form is new in Microsoft Dynamics AX 2012 R3 and is used to create various reward points offered to offers to occur points to achieve a tier status or to be used for redemption.

Once you open the loyalty reward form, you will need to create a new loyalty reward point record. Click new. In the reward after clicking new, in the reward point ID field enter an ID. And in the description field enter a description. In the reward point type field, select one of the following:

- Quantity points are based on a counted value, such as the number of transactions.
- Amount if points are based on a dollar value such as the total value of sale.

In the currency field, select a currency from the dropdown list. This field is only available when the reward point type is set to amount. Select the redeemable check box if a customer will be able to redeem these points. If this reward is only for occurring points for a tier status, leave this unchecked. In the redeem ranking field, enter a number with 1 being the highest for the redeeming sequence if this is used in conjunction with the other reward points in the loyalty program. In the expiration time value field, enter a number value for how it takes the points to expire. In the expiration time unit field, select a period from the dropdown menu that defines the time value that was entered. The summary section provides a snapshot of the current available, issues, used, and expired points for this particular reward point configuration.

One of the examples of how loyalty reward points are defined is to create a club bonus reward that expires after one month, enter an expiration time value of 1 and an expiration time unit of one month. Loyalty schemes. In the loyalty schemes, rules of how points will be managed and calculated are defined. Loyalty scheme acts as connection point between loyalty program and channels. Let us now review the process for creation of the loyalty schemes. To access loyalty schemes form, the path is retail, common, loyalty, loyalty schemes.



General

Scheme ID: Description:
 Loyalty program:

Earning rules

Program tier	Activity type	Category	Product	Product variant	Activity amount/quantity	Activity currency	Reward point ID	Reward point type	Redeemable
	Purchase products by amount	Fashion			1.0000	USD	Fabrikam rewar...	Amount	
	Purchase products by amount	Fashion			0.0100	USD	Total spent	Amount	
	Purchase products by quantity	Mens Sh...			1.0000		Fabrikam rewar...	Amount	
	Sales transaction count				1.0000		Total transacti...	Quantity	
Gold	Purchase products by amount	Fashion			1.0000	USD	Fabrikam rewar...	Amount	

Redemption rules

Program tier	Reward point ID	Reward point type	Reward points	Redemption type	Category	Product	Product variant	Amount or quantity	Currency	Start
	Fabrikam rewar...	Amount	1.0000	Payment by amount	Fashion			0.2500	USD	01/0
	Fabrikam rewar...	Amount	1.0000	Payment by amount	Fashion Accesso...			0.5000	USD	01/0
Gold	Fabrikam rewar...	Amount	1.0000	Payment by amount	Fashion			0.4000	USD	01/0

Retail channels 044

This page is not new to Microsoft Dynamics AX 2012 R3 but has been enhanced to define earning and redemption rules. Once you open the loyalty scheme, you will need to create a new loyalty scheme. Click new and then enter the scheme ID and description in the description field. In the loyalty program field, select one of the programs from the dropdown menu. In the earning rules section, you will define how customers earn points. Click add line to add a new line. In the program tier field, select a tier if applicable to this line. Otherwise, leave blank. In the activity field, select one of the following three options from one of the three following options:

- Purchases product by amount. Points are earned by the dollar amount of the sales transaction.
- Purchase products by quantity. Points are earned by the number of products sold on a sales transaction.
- Sales transaction count. Points are earned for each transaction.

In the category field, select a specific item, category, that will be able that will be able to earn points for this line rule. In the product field, you can select a specific product for this line that is derived from category that was selected.

In the product variant, select a variant from the dropdown menu that is derived from the product that was selected and will be applicable for point earning.

In the activity amount or quantity field, enter a numeric value for the amount or quantity that needs to be sold to earn the points listed in this line.

In the reward point ID, select a reward point ID from a dropdown menu, and the reward point type field will auto-populate with the amount of quantity based on the reward point ID. In the reward points field, enter a numeric value for the number of points that will be earned for this line.

In the start date and end date, enter the validity period for the earning of this particular line.

In the redemption section fields are same as that in the earnings section just described above, but the rules defined are used for calculation of redemption of points.

In the retail channels section right at the bottom you will define which stores participate in the loyalty program. Finally, we define the loyalty cards.

Loyalty cards are not a new concept and currently used in Microsoft Dynamics AX 2012. Microsoft Dynamics AX 2012 R3 has shifted the focus in Microsoft Dynamics AX client from loyalty customers' accounts to loyalty cards. This change will still allow the ability to associate a customer to the card but the enhancement enables the ability to keep the focus on earning points to a unique card number. In Microsoft Dynamics AX 2012 R3, you now have the ability to issue a new card in the Microsoft Dynamics AX client or in the retail channel. Loyalty card is now applicable for multiple accounts within an organization or a family. Loyalty card feature has also been enhanced to support multiple loyalty cards for one customer. Loyalty card is enabled to manage omni-channel business scenarios across multiple legal entities. To access the loyalty card page in AX client, follow the path retail, common, loyalty, loyalty card.

Loyalty schemes (1) - Scheme ID: Fabrikam, Fabrikam base scheme

File | Loyalty scheme | Edit | Delete | Loyalty scheme | Refresh | Export to Microsoft Excel | Attachments

Fabrikam

General | Fabrikam | Fabrikam base scheme | Fabrikam rewards

Scheme ID: Description: Loyalty program:

Earning rules

Program tier	Activity type	Category	Product	Product variant	Activity amount/quantity	Activity currency	Reward point ID	Reward point type	Re...
	Purchase products by amount	Fashion			1.0000	USD	Fabrikam rewar...	Amount	
	Purchase products by amount	Fashion			0.0100	USD	Total spent	Amount	
	Purchase products by quantity	Mens Sh...			1.0000		Fabrikam rewar...	Amount	
	Sales transaction count				1.0000		Total transacti...	Quantity	
Gold	Purchase products by amount	Fashion			1.0000	USD	Fabrikam rewar...	Amount	

Redemption rules

Program tier	Reward point ID	Reward point type	Reward points	Redemption type	Category	Product	Product variant	Amount or quantity	Currency	Start
	Fabrikam rewar...	Amount	1.0000	Payment by amount	Fashion			0.2500	USD	01/0/0
	Fabrikam rewar...	Amount	1.0000	Payment by amount	Fashion Accesso...			0.5000	USD	01/0/0
Gold	Fabrikam rewar...	Amount	1.0000	Payment by amount	Fashion			0.4000	USD	01/0/0

Retail channels 044

Identification of the loyalty scheme id. Close

This page is new to Microsoft Dynamics AX 2012 R3 and takes place of the loyalty customer list page in the previous version. Once the loyalty scheme page is open, you will need to create new loyalty card. The key fields in this creation process are as follows.

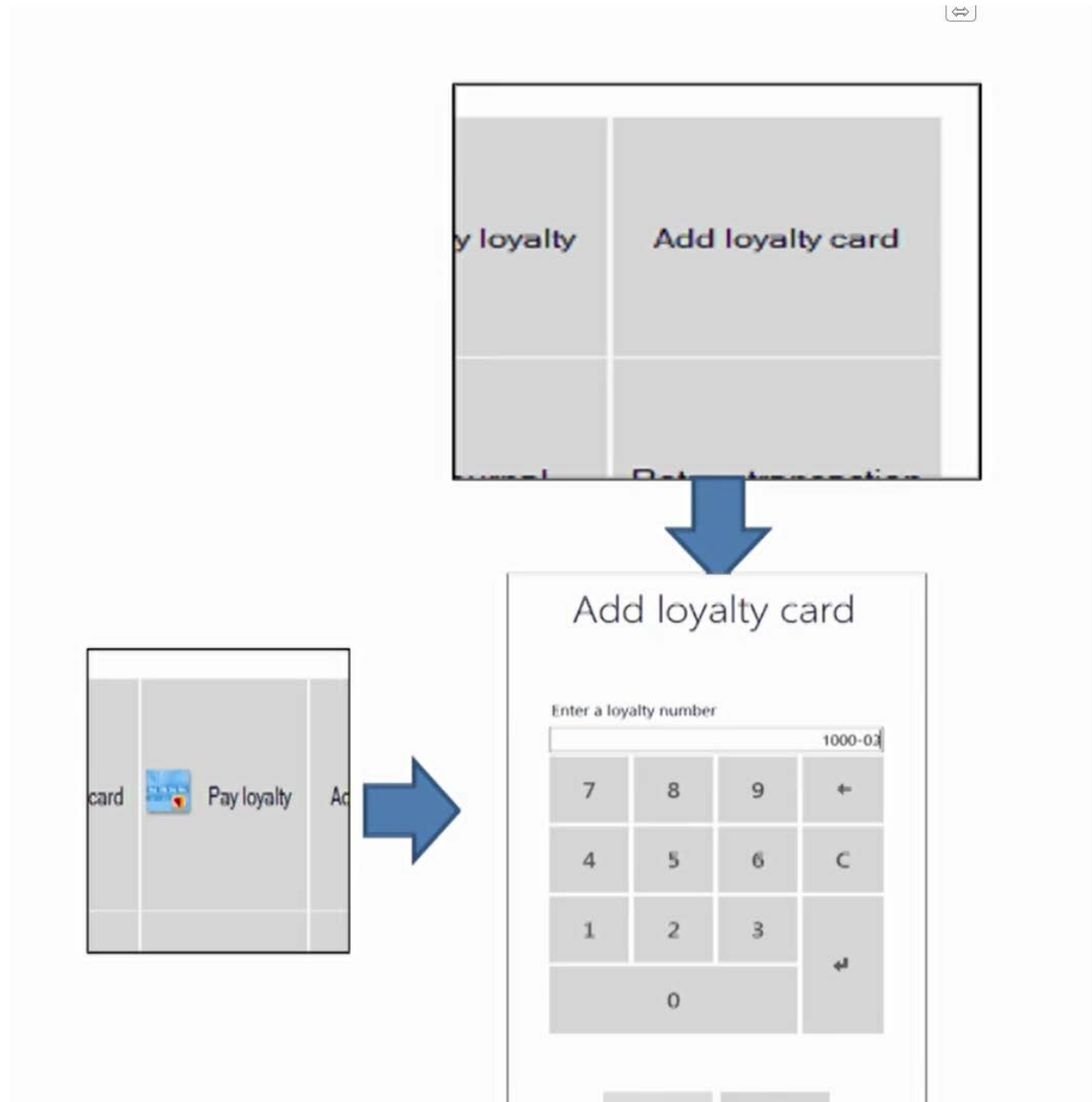
In the card type field, select one of the following from the dropdown menu:

- As card tender. This type of card is considered the primary card that can earn or redeem the points for the primary card owner and added card members. The customer can only use points for payment that have been collected with the same card.
- As contact vendor. This type of card is considered a secondary card that can earn or redeem the points only for the card member. The customer can use points for payment that have been collected by all cards for the loyalty contract.
- No tender. This type of card is considered a secondary card that can only earn points but not redeem them.
- Block. A loyalty card is blocked and cannot collect or use points.

Under the loyalty program's FastTab, click add new line to add a new loyalty program to the loyalty card. And, lastly, the reward point summary FastTab is used to view the reward point summary for the loyalty card.

6.3 View and Manage Loyalty Transactions

As we have already reviewed the setup of loyalty program, now let's review how to manage the loyalty transactions. First aspect of loyalty transaction that we need to understand is earning points by customers. In order for customers to earn loyalty points on their cards, they need to purchase items that need the qualification of the loyalty programs. Depending on the tier status that they have earned, they may qualify to earn different subsets of points.

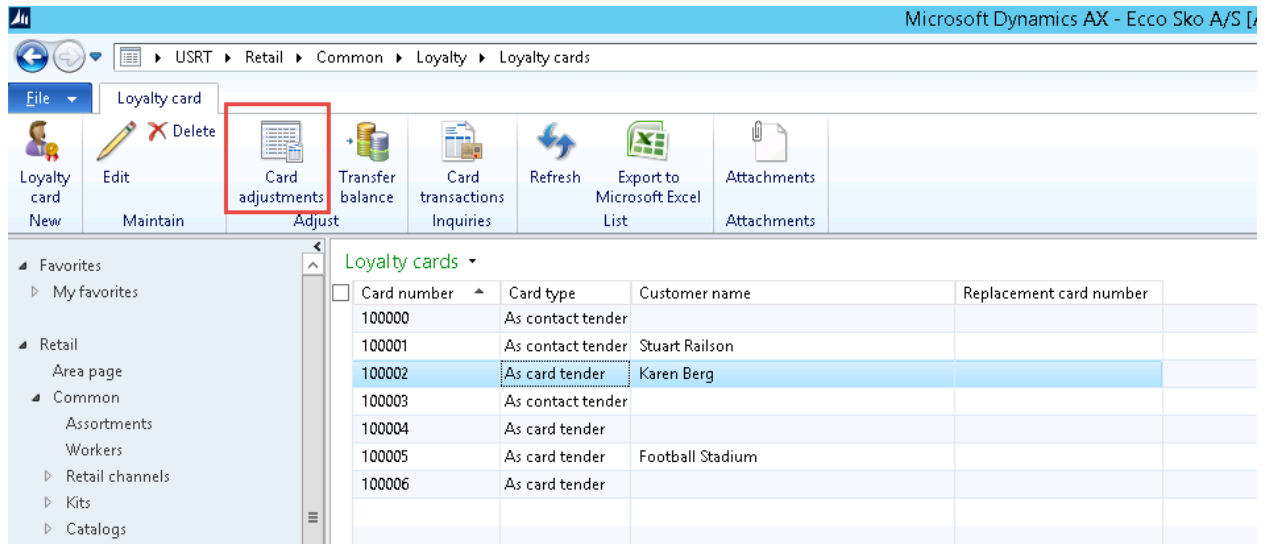


To earn points, you will need to add the loyalty card to the point of sale transaction. If a customer is associated to this loyalty card, then the customer will be added to the transaction.

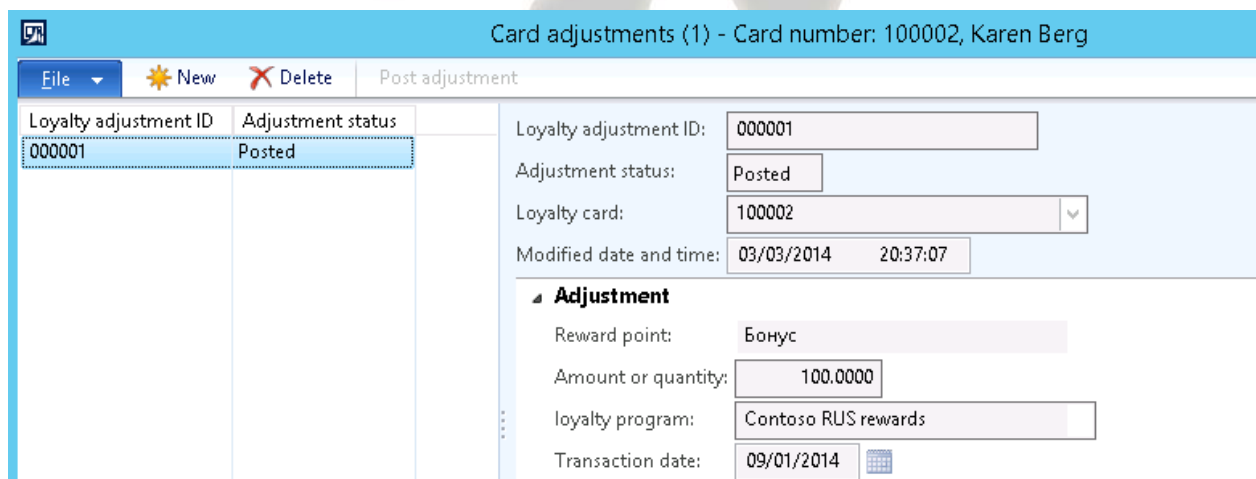
Redeem points. In order for customer to redeem loyalty points from their cards, they need to have enough points accumulated that meets the qualification of the loyalty program. Depending on the tier status that they have earned, they may qualify to redeem different subsets of the points.

Managing points. In the previous version of Microsoft Dynamics AX 2012, there was not a way to

manage reward points directly in case of in the case of manually awarding points for customer satisfaction or adjusting points based on transaction issues. In Microsoft Dynamics AX 2012 R3, the card adjustment feature has been added to manage these situations by creating the ability to post positive or negative point adjustments to the loyalty card. In the AX client, the path to do the adjustment is retail, common, loyalty, loyalty cards.



Click new to create new adjustments. In the loyalty adjustment ID field, enter a descriptive adjustment ID. The adjustment status is populated based on whether the adjustment is a draft or posted. The loyalty card is populated based on the loyalty card you highlighted when clicking the card adjustment option.



The modified date and time will insert the system's current date and time when posted. In the reward point field, select a reward point ID from the dropdown menu that this adjustment will be applied to. In the amount or quantity field, enter a positive or negative numeric value for the adjustment to be made. In the loyalty group field, select a loyalty group that this adjustment is associated with from the dropdown menu. Click post adjustment to apply this revision and click Yes in the window's prompt.

6.4 Gift cards

Let us now review how to set up a gift card and manage gift cards in Dynamics AX 2012. A gift card is a restricted monetary equivalent or script that is issued by retailers to be used as an alternative to a nonmonetary gift. Highly gift cards have become increasingly popular as they relieve the donor of selecting a specific gift.

The recipient of the gift card can use it at his or her discretion within the restrictions set by the issuing agency. In retail, gift cards that can be issued at one store and retained at any store in the organization. Retail keeps track of gift card balances so a card can be reused until its available balance reaches 0.

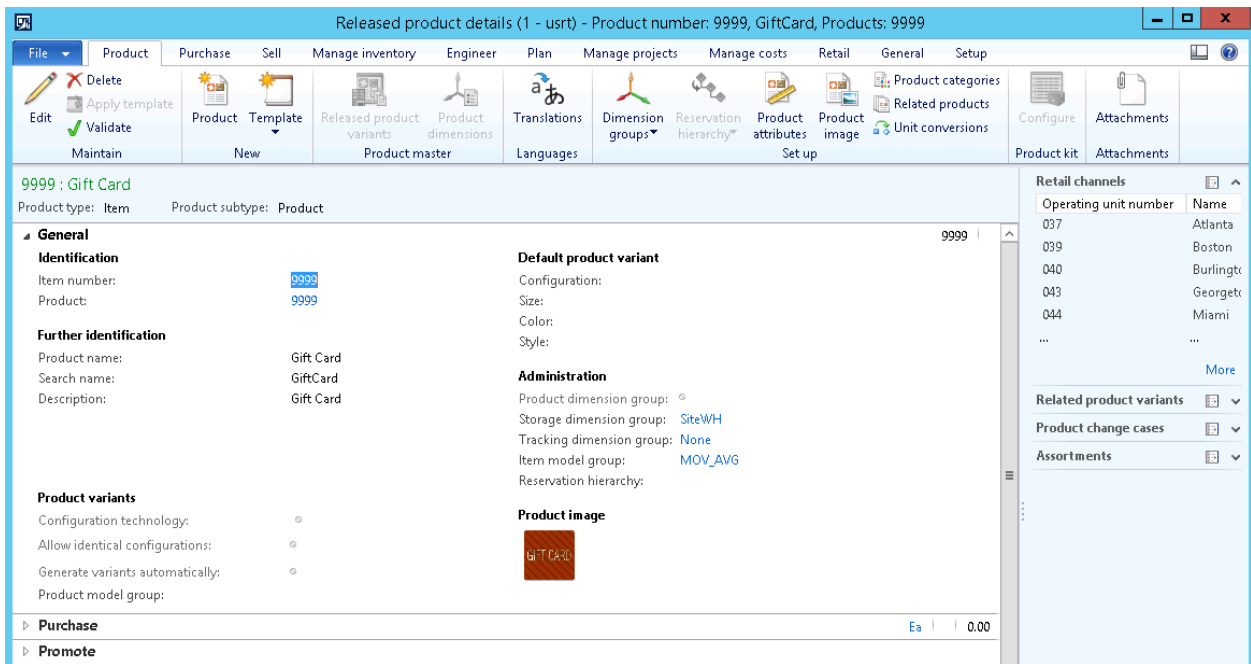
In retail, AX 2012 R3, the following functionality was added for gift cards.

- Support for electronic gift cards. In addition to supporting the sale and redemption of physical gift cards, retail in AX 2012 R3 lets you sell electronic gift cards in the online store and call center. Customers can redeem electronic gift cards in any channel. When the sales order for electronic gift card is invoiced, the gift card number is generated and sent in an e-mail message to the gift card recipient.
- More options for adding funds to gift cards. In previous releases you could add funds to gift cards only through the point of sale. Now you can also add the funds to gift cards that are issued from the call center.
- The ability to void unused gift cards. When a gift card is issued in error, you can void the gift card if it hasn't been used in transaction.
- Support for cross-company gift cards. Gift cards can be sold and accepted by retail stores across legal entities. In this scenario, one legal entity in an organization holds the liability balance for the gift cards and other legal entities transfer the value of the gift card sales and redemptions to that legal entity.

Now let's look at the main steps for setting up and managing the gift cards. We need to follow these steps. Set up retail service products and setup of retail parameters.

6.5 Gift card setup

Let us now review the retail service product creation for gift card setup in Dynamics AX 2012. To create our retail service product, the path that needs to be followed is product information management, common, products, all products, and product masters.



In the new product dialog box, enter the following values.

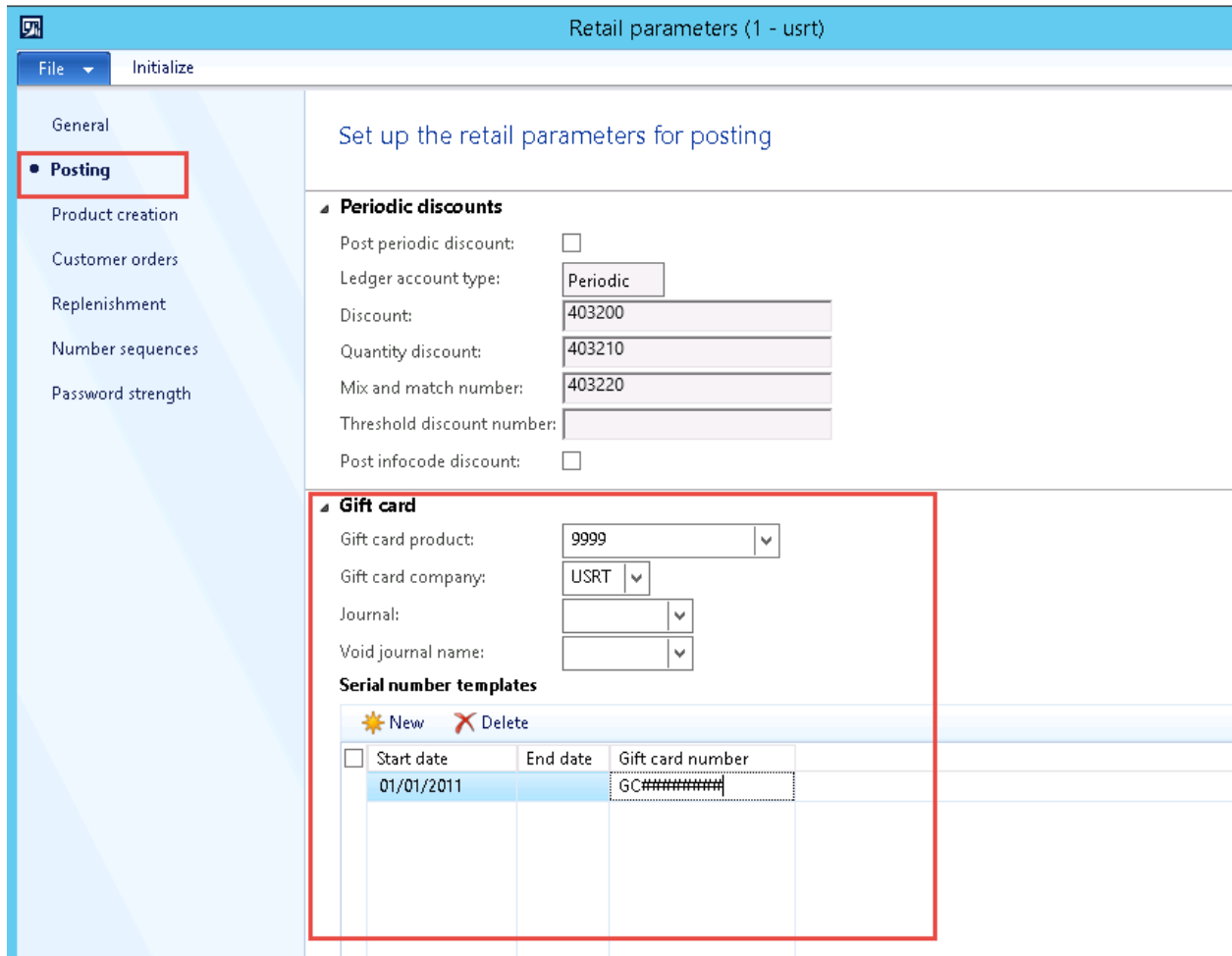
In the product type field, select service from the dropdown list. In the product subtype, select product from the dropdown list.

In the product name field, enter the name of the product. In the category field, select the retail product category that the product is assigned to.

Select the storage dimension group and the tracking dimension group from the action pane of the product.

In the product details form on the action pane, in the product authorization group, click release products to release the gift card to different legal entities.

Let us now review the second step in the process of creating gift card in AX 2012. In order to process the gift card in Dynamics AX, setup of parameters related to gift card is mandatory. This setup manages the posting of gift card transactions to general ledger.



Retail parameters (1 - usrt)

File Initialize

General

Posting

Product creation

Customer orders

Replenishment

Number sequences

Password strength

Set up the retail parameters for posting

Periodic discounts

Post periodic discount:

Ledger account type: Periodic

Discount: 403200

Quantity discount: 403210

Mix and match number: 403220

Threshold discount number:

Post infocode discount:

Gift card

Gift card product: 9999

Gift card company: USRT

Journal:

Void journal name:

Serial number templates

New Delete

Start date	End date	Gift card number
01/01/2011		GC#####

In the gift card product field, select the gift card product number. This is the product that represents the physical or electronic gift cards. The settings on the gift card product are used when statements that include gift card transaction are processed.

In journal field, enter the name of the journal to use when the intercompany journal entries are created. Journal entries are created during the statement process posting.

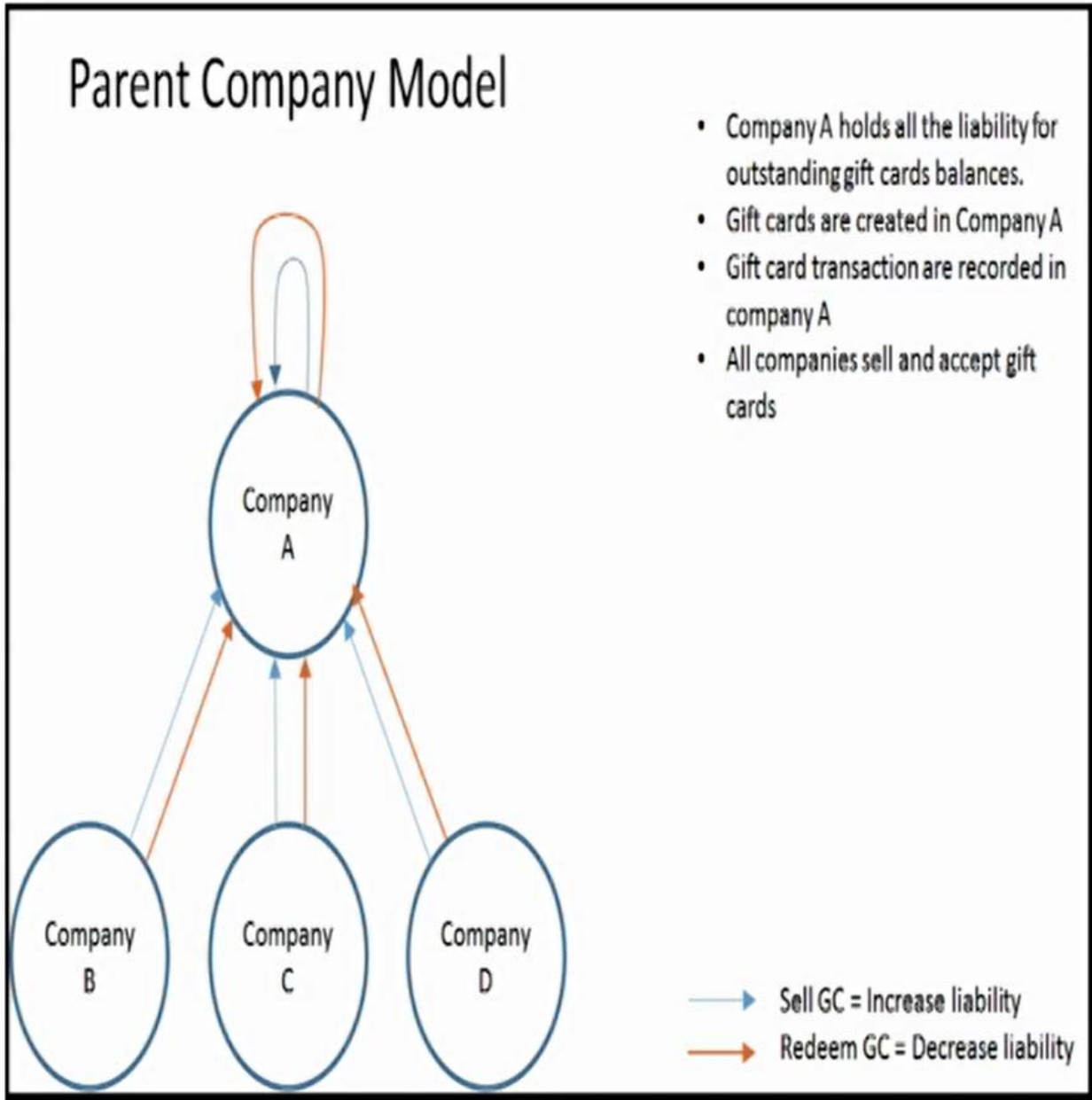
In the void journal name, enter the name of the journal to be used when a journal entry is voided.

In the serial number template fields, enter the start date and end date and the gift numbering template to use when generating electronic gift cards. If the gift card template doesn't expire, leave the end date field blank. Set up at least one gift card payment method.

In the gift card company field, select the legal entity that holds the liability for the gift cards.

Depending on how your organization supports gift card transactions, do one of the following: If your organization supports gift card transactions only within the same legal entity, select the same legal entity that you are setting up retail parameters for. If your organization supports gift card transactions across legal entities and the legal entity that you are setting up retail parameter for holds the liability for the gift card transaction, select the same legal entity. If your organization supports gift card transactions across legal entities and the legal entity that you are setting up retail parameters for does not hold the liability of the gift card transaction, select the legal entity that holds the gift card transaction liability.

Let us consider a small example. In the example shown on the screen, company A holds all the liability for outstanding gift card balances.



Gift cards are created in company A. Gift card transactions are recorded in company A but all companies can sell and accept gift cards. Blue lines indicate that when transactions take place in company A, B, C, D or in A, liability is increased only in company A. And, similarly, the orange line indicates that when the gift card is redeemed in company B, C, D, or A, liability is decreased from company A only.

6.6 View and Manage Gift Cards

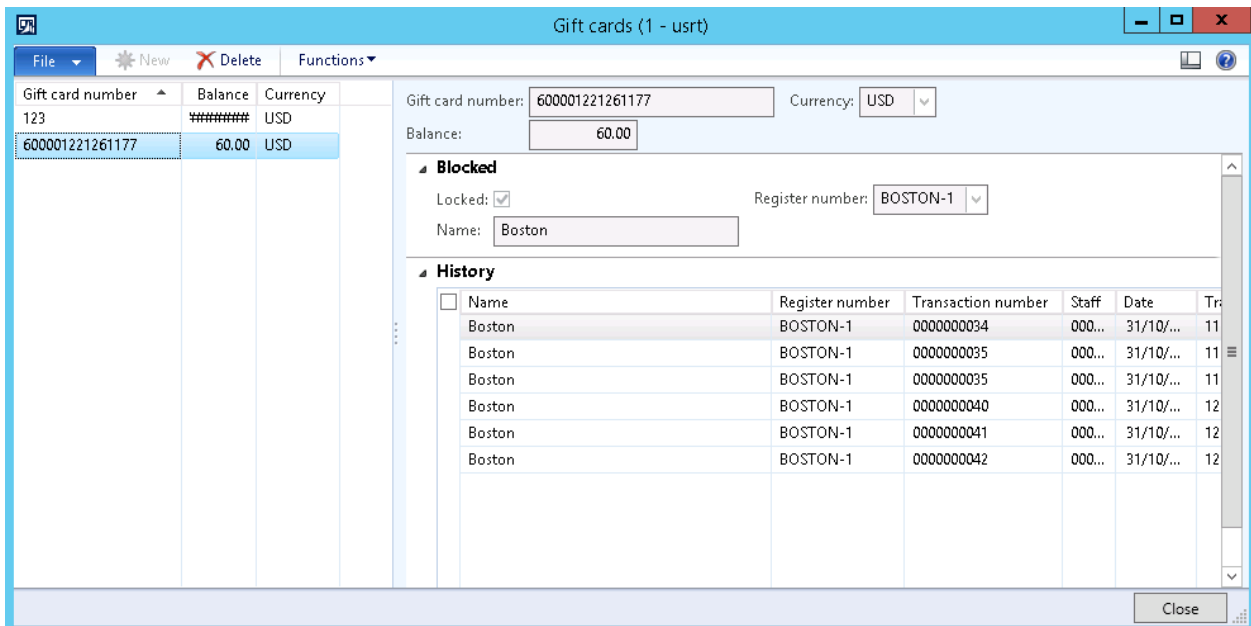
Let us now review how to manage the gift cards and where to find information related to gift card transactions in Dynamics AX 2012. To issue a gift card, select issue gift card button from the point of sale. In the amount area, enter the gift card issued issue amount. In the gift card number

area, enter the gift card number that has been issued to the customer. Receive the payment from the customer by using one of the payment method available in the point of sale.



For redeeming gift card, it will be treated just like any other payment method. As the payment method to be used for gift card is already mapped in the parameter settings, it will automatically relate and update the gift card.

For inquiry of the gift card, the path is retail, inquiries, gift card. This inquiry form provides all the information required for managing the gift cards. To prevent gift card balances from being overdrawn, gift cards are locked until each transaction is posted. To do this function, select the gift card in the list, click functions, and then click unlock. Or to void a gift card, click on the void option in the functions. And here are some of the quick tips for creating loyalty program, loyalty reward points, loyalty card schemes, loyalty card number, gift card service item, and gift card parameters



7 MODULE 24: PRODUCT KIT FEATURES

In this module, we will review the features of product kits. How to create and configure kits. Additionally, we will review how to assemble and disassemble kits and then proceed to sell these kits.

7.1 Product Kit Features

Let's start with reviewing the features of the product kit. Kitting is a competitive pricing tactic where retailers group products or services together as a package deal to create a new price point. Product kits are created to group and package individual products into a sellable product. A product kit can include multiple products, variants for those products and product substitutes. Customers can select a product substitute to replace a standard kit product. If the product substitute costs more than the standard kit product, the kit prices are adjusted to include the additional cost. The products that are included in a kit are referred to as components. The set of products that make up a product kit are referred to as kit configurations. One product kit can include many components and kit configurations.

An example of product bundling is the selling of a computer and it includes screen, mouse, keyboard, software and more, all for a single price.

Another example of product bundling is the Mother's Day promotion. A beauty product retailer can sell a Mother's Day gift basket with shampoo, conditioner, body lotion, facial cream, face wash all at a single price.

Now let's review the product kit and the key features. It has the ability to manage a kit configuration which includes components, particularly from existing products; substitutions, particularly from existing products; specify a single price for the kit, and specify component substitution prices. It also requires approval to publish a kit.

Then you need to manage the kits, which gives you the ability to assemble and disassemble the order, create an assembly order, and break a kit and add components to stock, typically done when

kits are discontinued or when components are out of stock to enable to satisfy the consumer demand for the individual components.

Product kit is viewable in all channels, POS, e-commerce, the components and variants and substitution all viewable in these channels. Customers can select the product substitute to replace a standard kit product. If the product substitute costs more than the standard kit, the product the kit price is adjusted to include the additional cost.

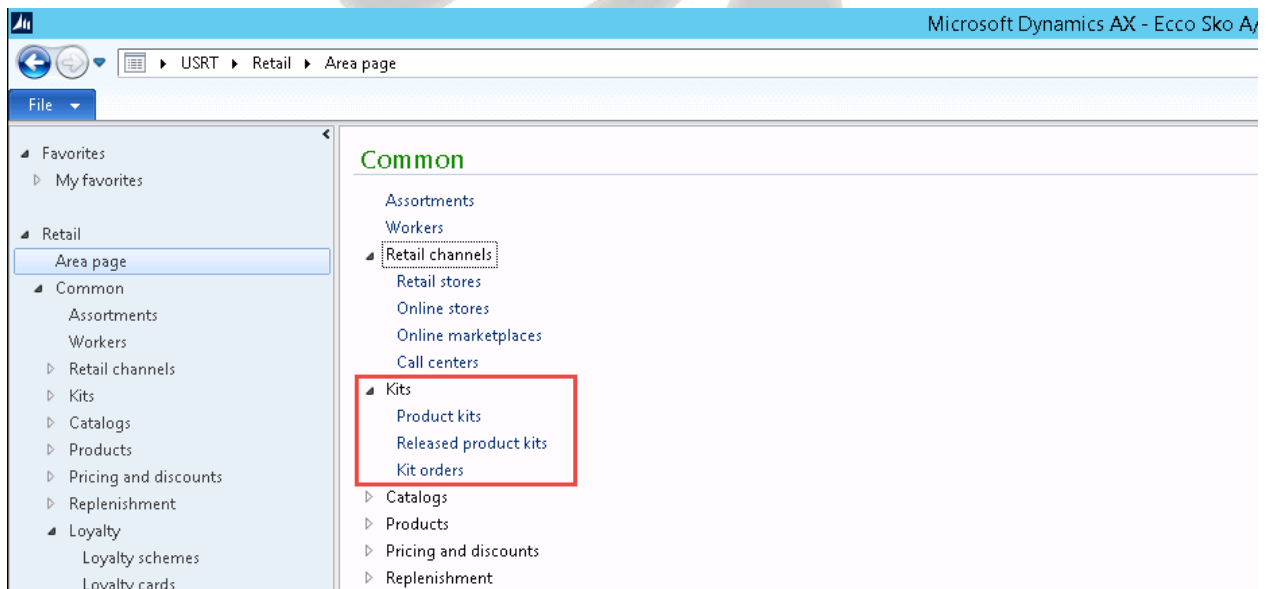
At the point of sale register, you can sell kits, view kit components, you have the ability to print components on the receipt which can be configured at your head office. Ability to disassemble the kit at POS is configurable at head office when components are out of stock at the store and they need to satisfy the consumer's demand for individual products.

7.2 Product Kit Setup

Now let's review the product kit setup process. Here's a list of recommended prerequisites which must be reconfigured before you start creating kits:

- Set up the kit parameters to specify a journal name.
- Set up a receipt format for kit products to enable individual kit components to be shown on the product receipts.
- And then finally, make sure the products are set up so that you can add them to build the kits as the products are components which form the kit.

Once you have completed the prerequisites for the product kit, you can commence creating of a product by clicking the retail option in the navigation pane and clicking kits and then product kits in the area page.



The required steps for the kit creation are outlined in the diagram.

Setting Up a Product Kit – Steps

Retail > Common > Kits > Product Kits



Your first step is to create a product kit. A product kit includes a group of separate products, product variants, and product substitutes. To create a product kit, you create a new product and designate it as a product kit.

Your second step is to add products and product substitutions to the product kit. You can add products and product variants to the kit as your kit components. In addition, you can add product substitutes for any of the kit components. The combination of the kit components and the component substitutes make up the different product configurations for the kit. The product configurations represent every product combination that a product kit might offer. For example, you set up a product kit that contains three products and two product substitutes. For one of the three products, you can offer three different product kit combinations. After you set up the kit components and component substitutes, you can also set the kit options, such as allowing disassembly at the point of sale. Product kits can be disassembled at either the warehouse or at the store. Product kits that can be disassembled at the store enable a store employee to sell one or more components from a product kit separately, instead of selling the entire kit. This option only applies to the product kits that are sold in a brick and mortar store using the POS register. Product kits that are disassembled at the warehouse are simply broken down, and the individual products are returned to an on-hand inventory. After you have added all the components and the component substitutes to the kit and set the kit options, the kit must be approved. Release the product kit configurations to your legal entities. Before you can generate assembly orders for the product kit, you must release the product kit configuration to the legal entities in which the kits can be sold. Process to release the kits are similar to releasing the products in Microsoft Dynamics AX.

The next step is set the standard properties for the released product kits.

After you release the product kit to your legal entities, you must set up any standard properties for the product kit. This includes assigning the kit to a product category, attributes or setting up distribution codes.

The next step is to define the kit pricing and generate trade agreements.

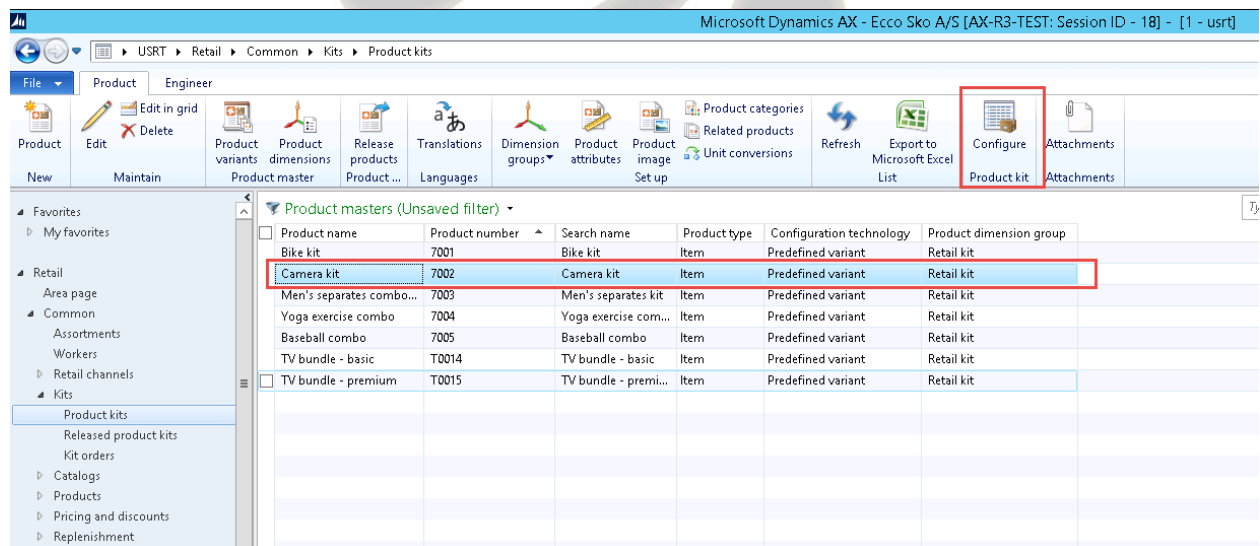
After you release the product kit to your legal entities, the next step is the pricing of the kit. Each component of the product kit is assigned a base price, and the sum of the base price is included in the base price of the product kit. The base price for each product component is the price of the product at the time it was added to the product kit. The other option is to specify a price for the kit. The specified price will be distributed all of the products of the kit. The price adjustment to each component is based on the percentage that each product's base price contributes to the total base price of the product kit. When you add substitute products to a product kit for a selected component, you can also specify if there's an additional charge when the customer selects the product substitute instead of the base components. The additional cost is included when the kit price is calculated.

Now let's move on to the next step of the generating an assembly order. After all the components have been defined and priced, the kit configurations have to be released to your legal entities.

The next step is to generate orders. When you generate assembly orders by indicating the number of kits to be assembled and nominate the warehouse which will create the kit.

The next, seventh step is to assemble the kit products. On generation of the assembly orders, the warehouse team can pick and pack the kit components to form the kit. On assembly, the warehouse workers updates their quantity for the built kit based on the completion and ready to be posted BOM journals to update the inventory on hand for the product kits is increased and the decrease in the individual components.

Now let's review some of the screens for the product kit. The product kit list view screen is displayed.



Microsoft Dynamics AX - Ecco Sko A/S [AX-R3-TEST: Session ID - 18] - [1 - usrt]

USRT > Retail > Common > Kits > Product kits

Product kit list view screen showing a table of product kits. The 'Camera kit' row is highlighted with a red box. The 'Configure' button in the ribbon is also highlighted with a red box.

Product name	Product number	Search name	Product type	Configuration technology	Product dimension group
Bike kit	7001	Bike kit	Item	Predefined variant	Retail kit
Camera kit	7002	Camera kit	Item	Predefined variant	Retail kit
Men's separates combo...	7003	Men's separates kit	Item	Predefined variant	Retail kit
Yoga exercise combo	7004	Yoga exercise com...	Item	Predefined variant	Retail kit
Baseball combo	7005	Baseball combo	Item	Predefined variant	Retail kit
TV bundle - basic	T0014	TV bundle - basic	Item	Predefined variant	Retail kit
TV bundle - premium	T0015	TV bundle - premi...	Item	Predefined variant	Retail kit

If you click the configure product kit screen, you can view some of the kit components created.

Configure kit (1) - Product number: 7002, Camera kit

File Edit Approve

7002

General

Identification
 Name: Camera kit
 Description:
 Status: Approved

Options
 Disassemble at register:
 Discontinue kit:

Updates
 Date and time created: 28/08/2013 23:42:50
 Date and time modified: 14/02/2014 01:49:23

Kit components 2201 : : Black : | | 2201 : : Silver :

Components

Product number	Product name	Quantity	Unit
2201 : : Black :	A. Datum SLR Camera X135	1.00	ea
2401 : : Black :	Litware Macro Zoom Lens X...	1.00	ea
2405 : : Black :	Litware USB Cable M250	1.00	ea

Substitution

Product name	Product number	Quantity	Unit
A. Datum SLR Camera X...	2201 : : Silver :	1.00	ea

Some of the areas to take note on the screen are the option to set the flag to allow disassembly of the product at POS or discontinue the product. Review the components area. You can allocate substitutes for each of the components at an additional cost or leave it blank for no additional charge. We can you are also able to specify a kit price or set a kit price by line item to achieve an overall price.

7.3 Assemble and Disassemble Product Kits

Let's review the assembly and disassembly of the product kits. You can generate assembly orders by using any of the following methods.

Kit order (1) - Quantity: 40,00

File New Delete

General

Order type: Assembly order Warehouse: DC-CENTRAL

Name: RKO0000007 Description:

Quantity: 40.00

Company: USRT

Configurations 2201 : : Black :

Update quantity

Configuration	Quantity
RKC0001665	0.00
RKC0001666	0.00
RKC0001667	0.00
RKC0001672	0.00
RKC0001673	0.00
RKC0001674	0.00

Components

Product number	Product name	Quantity	Unit
2201 : : Black :	A. Datum SLR Camera X135	1.00	ea
2401 : : Black :	Litware Macro Zoom Lens X...	1.00	ea
2405 : : Black :	Litware USB Cable M250	1.00	ea

The type of product kit order

Close

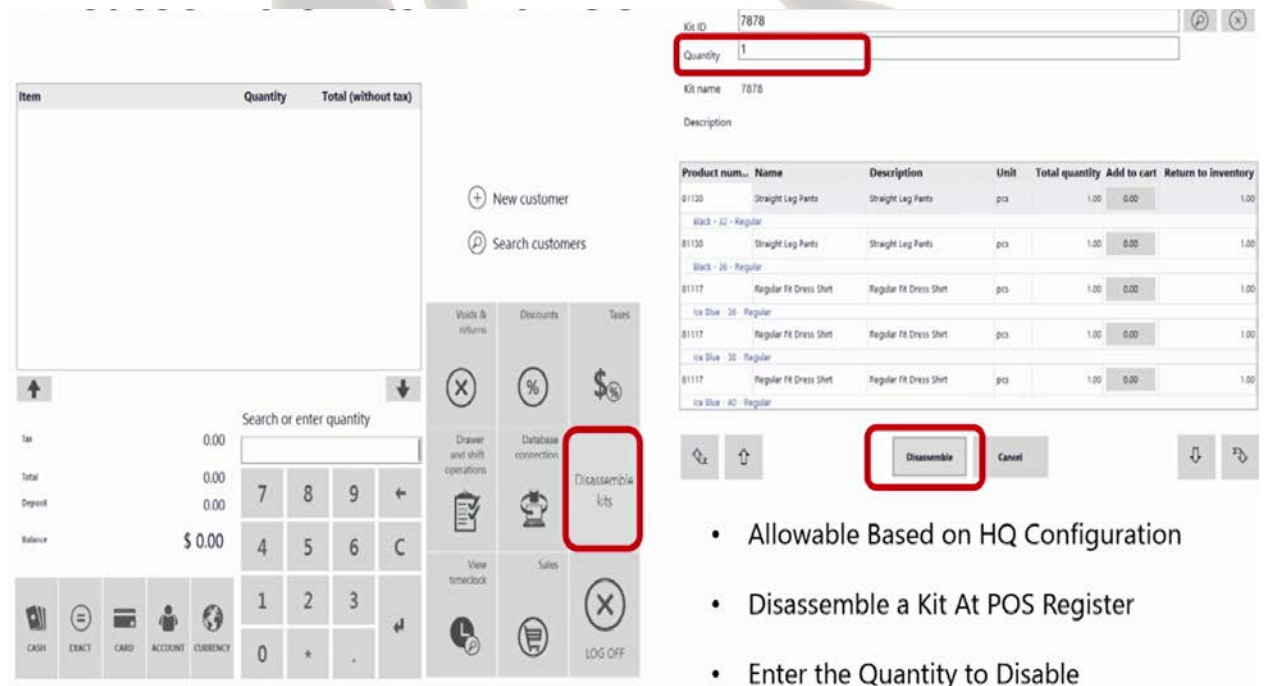
Assembly orders can be generated only after you configure the kit and release it to the respective legal entities.

These orders are generated by company and warehouse. You can define the quantity manually and generate the assembly order utilizing the kit order form, or you can automatically generate an assembly order from a sales order.

Kit assembly increases the quantity of the product kit and reduces the quantity of the components. Disassembly orders are created to break a kit and add to the components to stock, typically done when kits are discontinued, when components are out of stock, or to enable to satisfy the consumer demand for individual components.

The disassembly function can be performed at the warehouse or at the POS register, provided it's configured at HQ as seen earlier. To process a disassembly order, a warehouse worker must update the quantities for each kit configured that is disassembled. After the order is processed, post it to run the inventory process to update the status of the products from reserved to committed. Inventory for the product kit configuration is decreased and inventory for the individual products that are included in the kit configuration is increased.

Let's have a quick glance at the disassembly function at the POS register. Kits are disassembled when the kits are discontinued or due to a stock run out of the product, which is part of the kit. The POS screen displays the disassembly function at POS register.



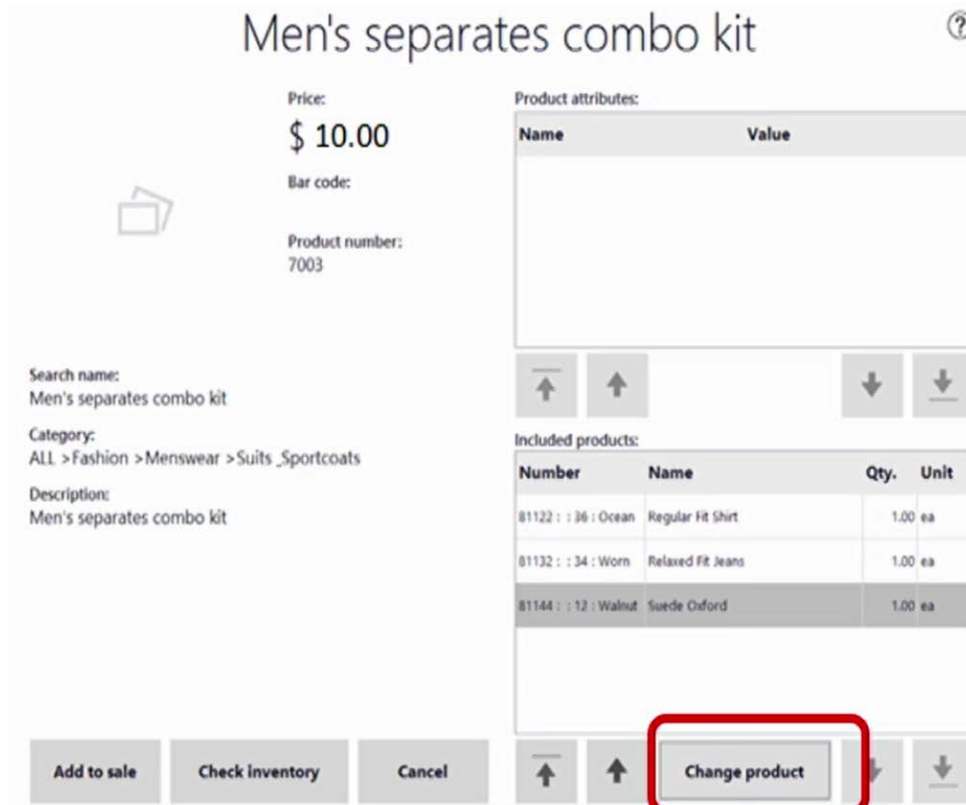
Product num...	Name	Description	Unit	Total quantity	Add to cart	Return to inventory
81130	Straight Leg Pants	Straight Leg Pants	pcs	1.00	0.00	1.00
Black - 32 - Regular						
81130	Straight Leg Pants	Straight Leg Pants	pcs	1.00	0.00	1.00
Black - 36 - Regular						
81117	Regular Fit Dress Shirt	Regular Fit Dress Shirt	pcs	1.00	0.00	1.00
Ice Blue - 36 - Regular						
81117	Regular Fit Dress Shirt	Regular Fit Dress Shirt	pcs	1.00	0.00	1.00
Ice Blue - 30 - Regular						
81117	Regular Fit Dress Shirt	Regular Fit Dress Shirt	pcs	1.00	0.00	1.00
Ice Blue - 40 - Regular						

- Allowable Based on HQ Configuration
- Disassemble a Kit At POS Register
- Enter the Quantity to Disable

This is configured at HQ and can be based on security roles at the store. When the authorized cashier activates the disassembly function, the disassemble kit form to the cashier to enter the quantity to be disassembled. The action to disassemble the kits results in the reduction of kit quantity and the increase in the product components from the disassembled kit.

7.4 Selling Product Kits

Let's review how kits are sold at the point of sale register in the store. Kits can be sold like other products at the point of sale register by scanning the kit or using the search functionality to search by product number or keyword search.



Men's separates combo kit ?

Price: **\$ 10.00**

Bar code:

Product number: 7003

Product attributes:

Name	Value

Search name: Men's separates combo kit

Category: ALL > Fashion > Menswear > Suits ,Sportcoats

Description: Men's separates combo kit

Included products:

Number	Name	Qty.	Unit
81122 : 36 : Ocean	Regular Fit Shirt	1.00	ea
81132 : 34 : Worn	Relaxed Fit Jeans	1.00	ea
81144 : 12 : Walnut	Suede Oxford	1.00	ea

Buttons: Add to sale, Check inventory, Cancel, Change product (highlighted), and navigation arrows.

If a customer wants to substitute a kit component, click the change button and launch the change product form. This will enable the cashier to replace the selected component in the included products grid with its substitutes. Click okay, and then add it to the sale of the transaction.

Let's review the quick tips for the creation of products. Initially, you set up the kit parameters in the retail parameters area, then set up the kit number sequence in the retail shared parameters area. Ensure the products already are created so that you can commence creating a product kit. Then generate a kit order to enable the release of the product kits. For the assembling of the kits, enable the warehouse or store to assemble the kits. For the disassembling function, that is mainly from the warehouse back office perspective.