Enterprise Portal Retail User's Guide

Microsoft Dynamics® AX for Retail

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U.S. and Canada Toll Free 1-888-477-7989

Worldwide +1-701-281-6500

www.microsoft.com/dynamics

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Introduction

This guide describes using Enterprise Portal for Microsoft Dynamics® AX to perform some aspects of a store’s back-office retail operations. With Enterprise Portal, store managers and other employees can use a web browser to access store-inventory information at the head office and perform inventory tasks that would otherwise require Microsoft Dynamics® AX for Retail Headquarters.

Note

- Before an employee can use Enterprise Portal, the employee must be assigned to one of three retail user profiles and to one or more stores in Microsoft Dynamics AX. For more information, see the *Retail Headquarters User’s Guide*.
- Enterprise Portal and Role Centers are features of Microsoft Dynamics AX. For more information about using Enterprise Portal and Role Centers, see the documentation for Microsoft Dynamics AX.
- For installation or technical information about Enterprise Portal, see the documentation for Microsoft Dynamics AX.

Enterprise Portal Home page

Log on

1. Start a browser and go to the retailer's Enterprise Portal webpage.
2. Log on with Windows credentials.

   Enterprise Portal displays the **Home** page with the Role Center that has been assigned to you. For more information, see "Role Centers," later in this guide.

Select a store

An employee can access information about only those stores that have been assigned to the employee. If an employee has been assigned to more than one store, the primary store is displayed by default and other stores can be selected.

- On the Enterprise Portal toolbar, on the **Store** drop-down menu, select a store.

View information about the store

- Click the **Retail** tab.

  Enterprise Portal displays the store's contact information and hours, lists of stock counts, purchase orders and incoming transfer orders, in addition to outgoing transfer orders. For more information, see "Stock counts," "Receiving," and "Picking," later in this guide.

View a list of all items

1. Click the **Retail** tab.
2. Under **Main lists**, click **Retail item list**.

   Enterprise Portal displays a list of all the items that are carried by all stores, with information such as prices and quantities. You can search and browse the list. The list is read-only.
3. To see details about an item, double-click the item.
4. To see related information about an item, on the item details form, click **Related information**, and then do one of the following:
   - To see on-hand quantities of the item at all stores, click **On-hand**.
   - To see information about variants of the item, click **Item variants**.
   - To see documents related to the item, click **Documents**.

View the store's promotions and discounts

1. Click the **Retail** tab.
2. Under **Main lists**, click **Promotions and discounts**.

   Enterprise Portal displays a list of the promotions and discounts that are assigned to the store with information such as type and status. You can search and browse the list. The list is read-only.
3. To see details about an item, double-click the item.

View reports

You can use reports to monitor sales trends, inventory, pricing, and employee performance to gain valuable insights about the retail business.

1. Click the **Retail** tab.
2. Under **Retail Reports**, click the report that you want. Enterprise Portal includes these reports:
   - **Sales Performance**

     Select **Week to date**, **Month to date**, or **Year to date**.
   - **Sales Comparison by Year**

     Select **7 days**, **12 weeks**, **6 months**, or **1 year**.
   - **Sales by Hour**

     Click the calendar icon, and then select a date.
   - **Sales by Staff**

     Select **Today**, **Current week**, **Current month**, or **Previous month**.
   - **Sales by Item Hierarchy**

     Select **Today**, **Week to date**, **Month to date**, or **Year to date**.

Role Centers

Role Centers are pages in Enterprise Portal that display business information, links, and key tasks geared for specific retail roles. The retail roles (and their Role Centers) include:

- **Retail Headquarters**
- **Store Manager**
- **Store Associate**

Retail Headquarters

This Role Center is designed for employees whose primary work is item maintenance, promotions and discounts, inventory replenishment, and statement posting. The Role Center includes these parts:

My Links

- **Retail item list** – Displays a list of all the items that are carried by all the stores.
- **Promotions and discounts** – Displays a list of the promotions and discounts that are assigned to the store.
- **On-hand item stock inquiry** – Displays on-hand inventory information for all stores.

Sales performance

Displays sales information for the top 10 and bottom 10 stores for a specified period. By default, the report displays data for **Month to date**. You can also choose **Week to date** or **Year to date** periods.

Sales by item hierarchy

Displays a pie chart that shows the store's sales amounts by a selected item hierarchy group (business group, division group, retail department, and retail group) for a specified period, either **Week to date**, **Month to date**, or **Year to date**.

For example, if you select **Retail department**, the pie chart displays sales percentages for the top five departments, as well as **Other** (all other departments).

Sales comparison

Displays a line chart that compares the store's sales for a specified period this year to the same period in the previous year. You can choose periods of **7 Days**, **12 Weeks**, or **6 Months**. By default, the period is 12 Weeks.

Work List

Displays messages and alerts from Retail Headquarters.

Store Manager

This Role Center is designed for employees with management responsibilities and privileges, typically store managers. The Role Center includes these parts:

My Links

- **Retail item list** – Displays a list of all the items carried by all the stores.
- **Promotions and discounts** – Displays a list of the promotions and discounts that have been assigned to the store.

Sales by staff member

Displays a bar chart that shows sales figures for the store's staff for a specified period. By default, the report displays data for **This week**. You can also choose **This month** or **Previous month** periods.

Sales by hour

Displays a bar chart that shows the store's sales amounts for the current day, by hour.

Sales comparison

Displays a line chart that compares the store's sales for a specified period this year to the same period in the previous year. You can choose periods of **7 Days**, **12 Weeks**, or **6 Months**. By default, the period is 12 Weeks.

Work List

Displays messages and alerts from Retail Headquarters.

Store Associate

This Role Center is designed for employees whose primary work is non-management-related, typically cashiers, stock clerks, floor sales staff, and so on. The Role Center includes these parts:

My Links

- **Retail item list** – Displays a list of all the items carried by all the stores.
- **Promotions and discounts** – Displays a list of the promotions and discounts that are assigned to the store.

Sales by hour

Displays a bar chart that shows store's sales amounts for the current day, by hour.

Work List

Displays messages and alerts from Retail Headquarters.

Stock counts

You can use Enterprise Portal to perform stock counts from any computer with Internet access – you do not need to use a point-of-sale register. And, you can use Enterprise Portal to perform two kinds of stock counts:

Unscheduled stock count – This is a stock count initiated by a store when the items to be counted are not predetermined by the head office. This type of count is often used for informal counts or spot checks as part of loss-prevention measures.

Scheduled stock count – These stock counts are initiated at the head office, which specifies what items to count. The head office creates a counting document and sends it to the store, where actual stock-on-hand quantities are entered into Enterprise Portal.

When either kind of stock count is finished, the store sends the completed counting document back to the head office, where it is posted to inventory.

You can perform a stock count using a scanner or entering the item information manually. You can suspend the stock count and resume at a later time, if necessary.

Tip

You can also perform unscheduled stock counts in Retail POS. For more information, see the *Retail POS User's Guide*.

Note

Before you can perform a stock count, ensure that a store inventory terminal, a worksheet mask, and a staff member with store inventory access are set up. For more information, see the *Retail Headquarters User's Guide*.

Perform a stock count

1. Log on to your company's Enterprise Portal with an account that has store inventory access.

   Enterprise Portal displays the **Home** page with the Role Center that has been assigned to you.

2. Click the **Retail** tab, and then under **Main lists**, click **Stock counts**.

   Enterprise Portal displays a list of open and scheduled stock counts.

3. Click **New** to create a new stock count, or double-click an open or scheduled stock count.

   Enterprise Portal displays the **Stock count** form.

4. In the **Reference number** box, type a reference number for the stock count.
5. In the **Store inventory ID** box, type the store's ID number.
6. In the **Type** box, select **Stock count**.
7. In the **Worksheet mask** box, select the worksheet mask for the stock count.
8. In the **Staff** box, select your name.
9. Do one of the following:
   - Scan an item.
   - Click **Look up**, and then select the item.
   - In the **Item number or bar code** box, type the item number.
10. In the **Quantity** box, type the item's quantity.

11. If the item is a variant, select dimensions in the **Size**, **Color**, **Style**, and **Configuration** boxes, as necessary.
12. Click **Add**.
13. Repeat steps 9 through 12 for the items that you want to count.
14. When you have finished adding items to the stock count, click **Submit** to send the stock count to Retail Headquarters.

Receiving

You can receive inventory from purchase orders and incoming transfer orders. The receiving documents can be downloaded from Retail Headquarters on demand, and employees who have been granted access can receive the merchandise. Completed receiving documents are then uploaded to Retail Headquarters for posting to the original purchase orders or transfer orders.

Item variants and units of measure can be included when receiving inventory.

Tip

You can also receive inventory in Microsoft Dynamics AX for Retail POS. For more information, see the *Retail POS User's Guide*.

Note

Before you can receive inventory, ensure that a store inventory terminal, a worksheet mask, and a staff member with store inventory access are set up. For more information, see the *Retail Headquarters User's Guide*.

Receive a purchase order or transfer order

1. Log on to your company's Enterprise Portal with an account that has store inventory access.

   Enterprise Portal displays the **Home** page with the Role Center that has been assigned to you.
2. Click the **Retail** tab, and then under **Main lists**, click **Receiving**.

   Enterprise Portal displays a list of receiving documents.
3. Double-click the receiving document that you want.
4. The **Order number** box displays the number of the order.
5. The **Store inventory ID** box displays the store number.
6. In the **Staff** box, select a staff member.
7. Select an item listed on the order.
8. In the **Quantity** column, type the item's quantity.
9. Click **Add**.
10. Repeat steps 7 through 9 for the items that you want to receive.
11. When you have finished receiving items, click **Submit** to send the completed receiving document to Retail Headquarters.

Picking

You can use Enterprise Portal to complete outgoing transfer orders and pick merchandise for them. Picking documents can be downloaded from Retail Headquarters on demand, and employees can pick the merchandise. Completed picking documents are then uploaded to Retail Headquarters for posting to the original transfer orders.

Tip

You can also pick merchandise and complete outgoing transfer orders in Microsoft Dynamics AX for Retail POS. For more information, see the *Retail POS User's Guide*.

Note

Before you can complete outgoing transfer orders, ensure that a store inventory terminal, a worksheet mask, and a staff member with store inventory access are set up. For more information, see the *Retail Headquarters User's Guide*.

Complete an outgoing transfer order

1. Log on to your company's Enterprise Portal with an account that has store inventory access.

   Enterprise Portal displays the **Home** page with the Role Center that has been assigned to you.

2. Click the **Retail** tab, and then under **Main lists**, click **Picking**.

   Enterprise Portal displays a list of picking documents.

3. Double-click a picking document.

   Enterprise Portal displays the **Picking** form.

4. The **Order number** box displays the number of the transfer order.
5. In the **Store inventory ID** box, type the store's ID number.
6. The **Type** box displays the type of order.
7. In the **Staff** box, select a staff member.
8. Select an item listed on the order.
9. In the **Quantity** box, type the item's quantity.
10. Click **Add**.
11. Repeat steps 8 through 10 for the items that you want to pick.
12. When you have finished picking items for the transfer order, click **Submit** to send the picking document to Retail Headquarters.