Demo script

Customer Self-service (CSS) Mobile App

Microsoft Dynamics 365 FO

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Foreword

The Customer self-service app is an integrated online platform shared by customers and their trading partners. The Customer self-service app is used for entering customer information, submitting documents, displaying status, and communicating.

Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR
GRC007 – Test Script - Contracts	26/07/2022	2.14	Karl Frenz

Table 1: Related Documentation

Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY

Table 2: Change and Version History

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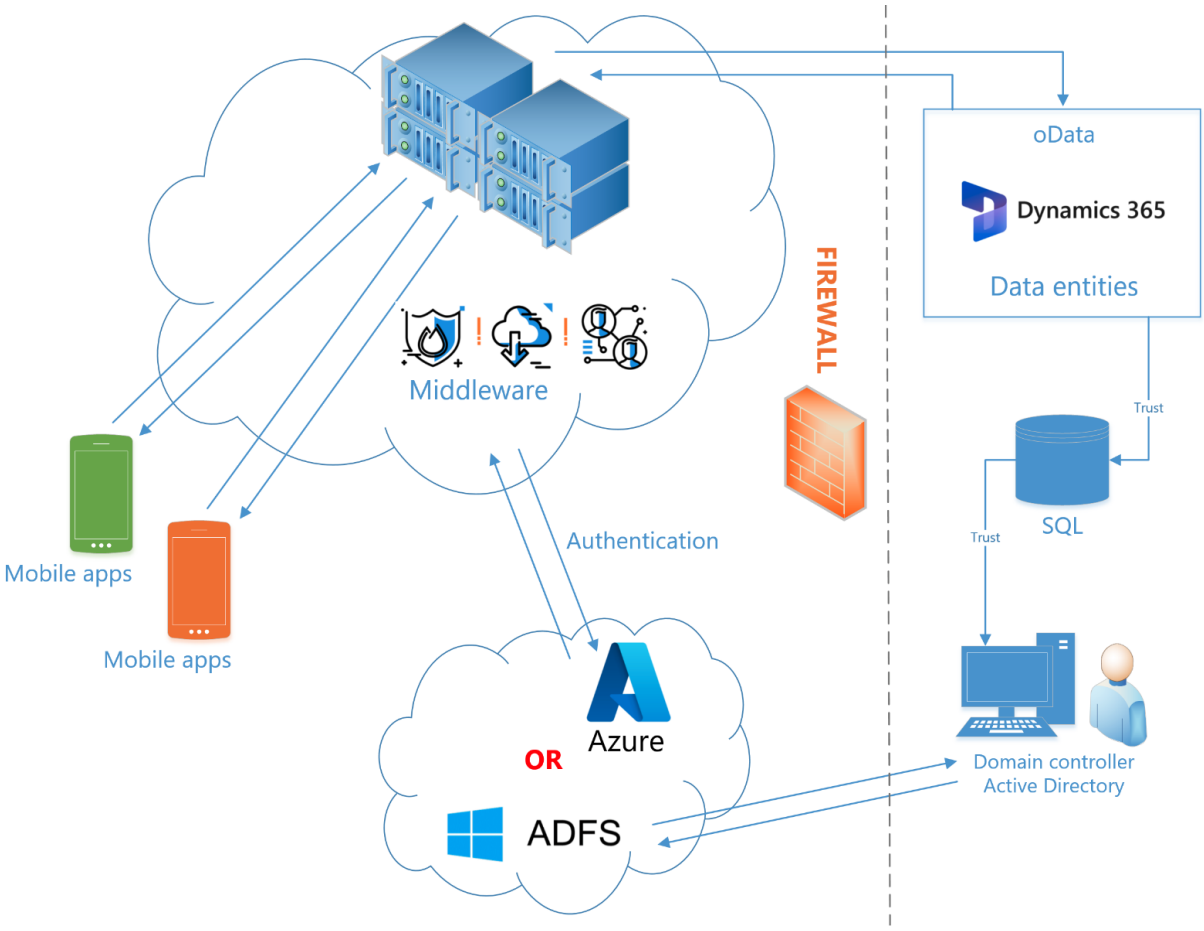
1. Technology

- Microsoft Dynamics 365 (D365 for Finance and Operations)
  - GRC module
- Axnosis middleware
  - Node.js
- Ionic/Angular standalone applications
  - Customer Self-service mobile application



2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Customer Self Service mobile app.
- The apps support both platforms

- The apps can be downloaded from:
  - Android: Google Play store
  - iOS: TestFlight or AppStore

- The user must have a valid D365, for Finance and Operations, license:
  - Environment: Same D365 environment as used for transacting
  - Company: Defaults to the user setup in D365

- The users should be able to successfully login to the app by using the same login details as used for D365 for Finance and Operations. The relevant restrictions and legal entity allocations on D365 for Finance and Operations will be applied on the mobile app sessions. The same user security roles will permit/exclude the user's right to capture events on the app.

- Whenever a new app update is required to be installed on the mobile phone, first ensure:
  - Previous app installations are uninstalled
  - Clear the mobile phone's cache (Android)
  - Remove all previous downloads of the application from the phone's download folder
  - Re-install the application and use

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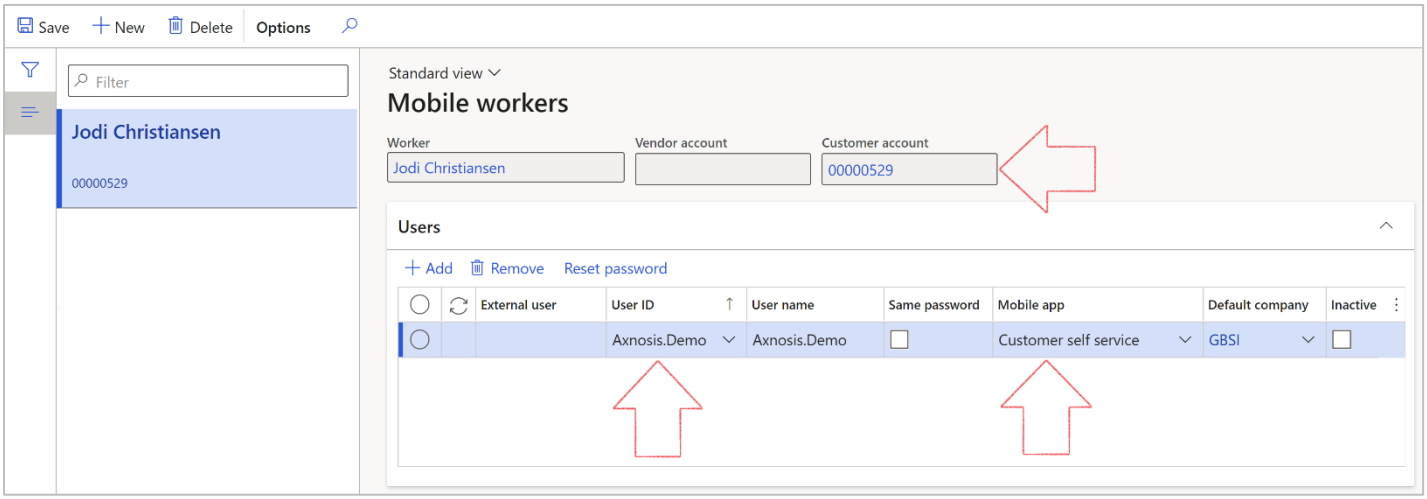
2.1 Setup inside D365

- Go to: **GRC>Setup>Mobile workers**
- The **Customer account** is selected in the header
- The **User ID** associated with the **Mobile app** is specified under the **Users** Fast tab



2.2 Background

The Customer self-service app is an integrated online platform shared by customers and their trading partners. The customer self-service app is used for entering customer information, submitting documents, displaying status, and communicating. With a customer app, creating documents like electronic sales orders, viewing contracts, and customer invoices for payment, is more accessible. It also reduces the costs of sales cycles by improving the exchange of business documents and shortening the time it takes to process the content of these documents.

- It is assumed that the D365 GRC module is installed on D365.

2.3 Scenario

You are a customer (Agriman (Pty) Ltd), trading with Takelot. You have been given access by Takelot to view certain details applicable to your customer details in their system.

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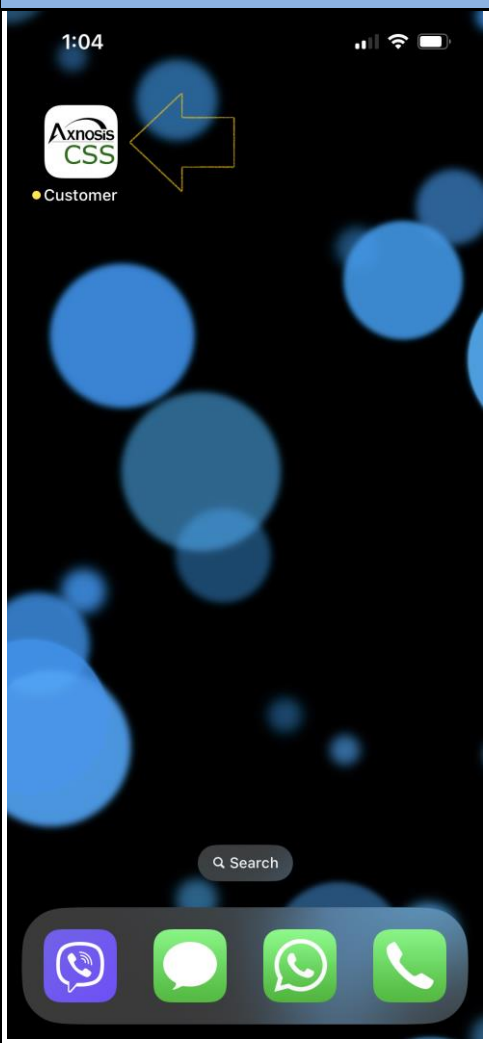
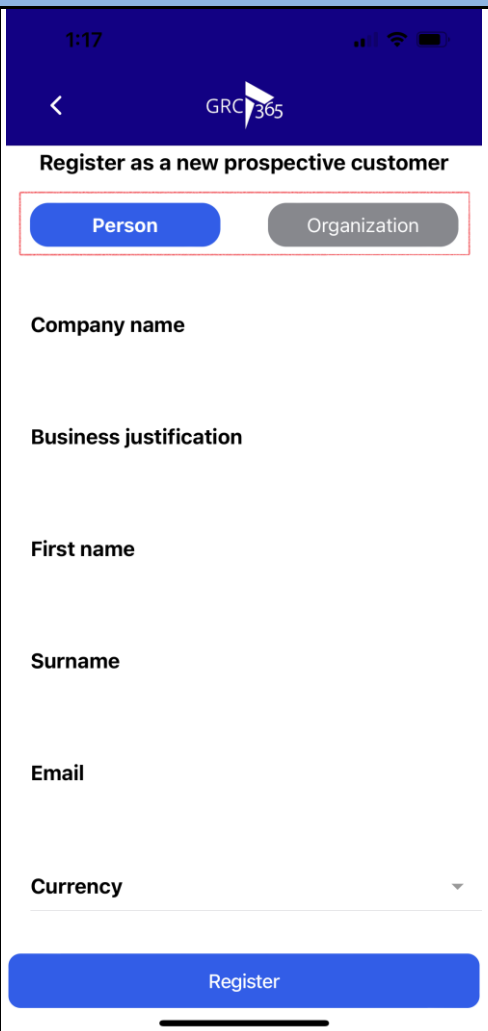
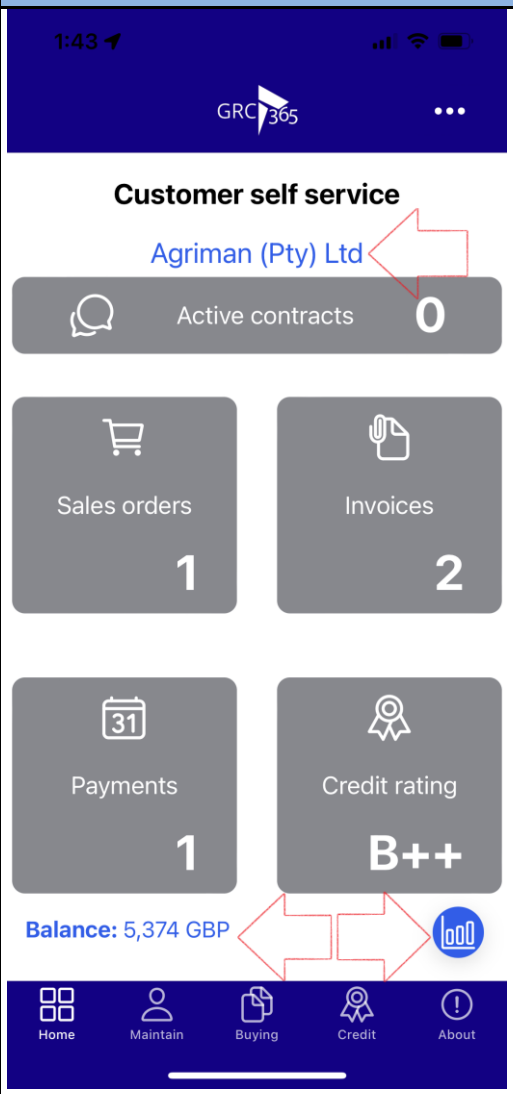
3. Demo script

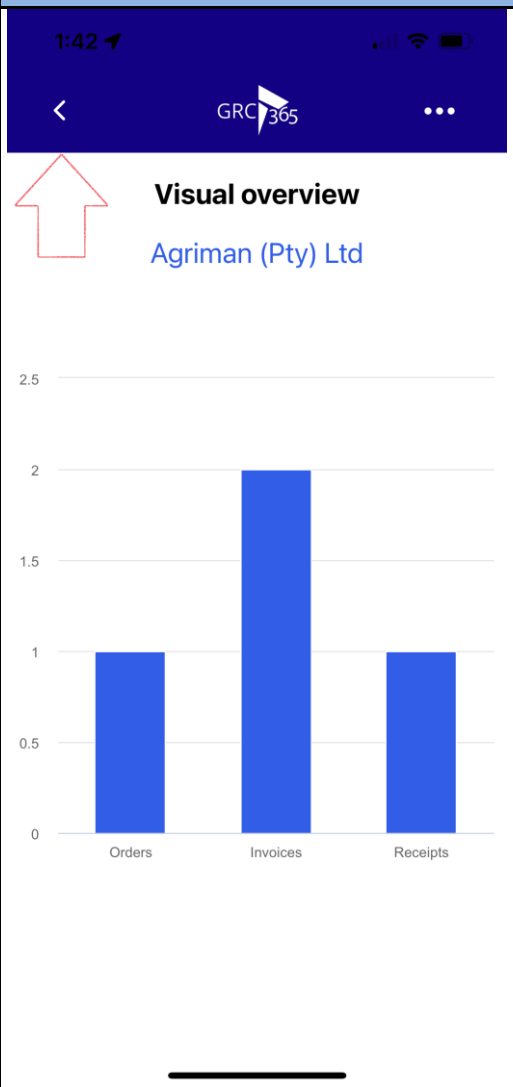
3.1 Log into the Customer Self-service (CSS) mobile app

TALKING POINTS AND STEPS	MOBILE APP
The user takes out his/her mobile phone and taps on the **Customer** icon.	

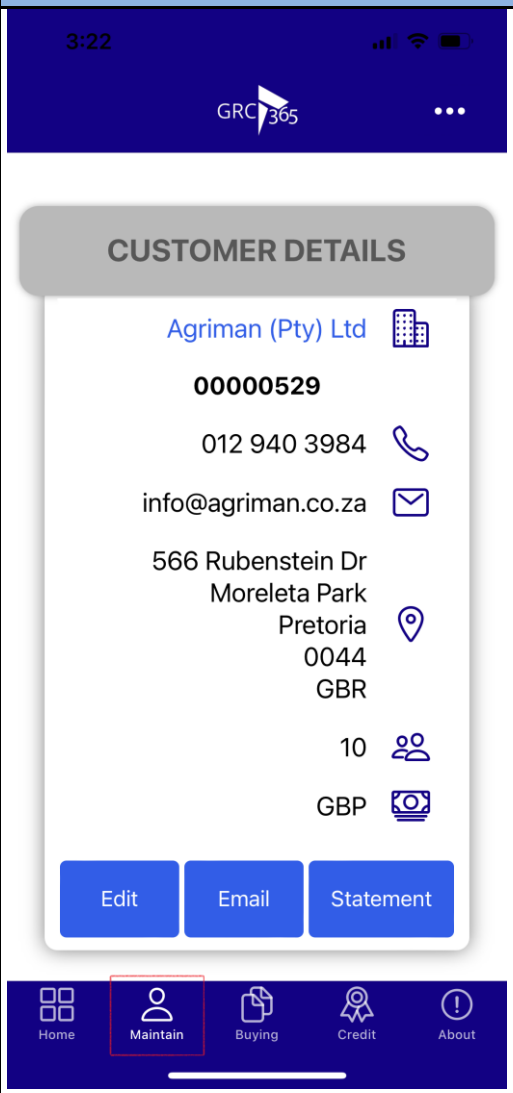
TALKING POINTS AND STEPS	MOBILE APP
The logo on the **login** screen appears … The user's D365 login details are entered and used by the app for validation. The user then taps on the **Login** button. If you have not yet registered as customer, tap on the **Register** button.	

TALKING POINTS AND STEPS	MOBILE APP
On the **Register as a new prospective customer** screen, enter the following details: • Open the relevant tab for registering a **Person** or an **Organization** • Enter the **Company name** • Enter the **Business justification** • Enter your **First name** • Enter your **Surname** • Enter your **Email address** • Select the relevant **Currency** Tap on the **Register** button. A new record will be created in the "All prospects" table/form under the **Sales and marketing** module. Workspaces Customers All customers Recalculate credit limit Relationships Contacts Prospects All prospects ★ My prospects Converted prospects Imported prospect list Leads Opportunities	

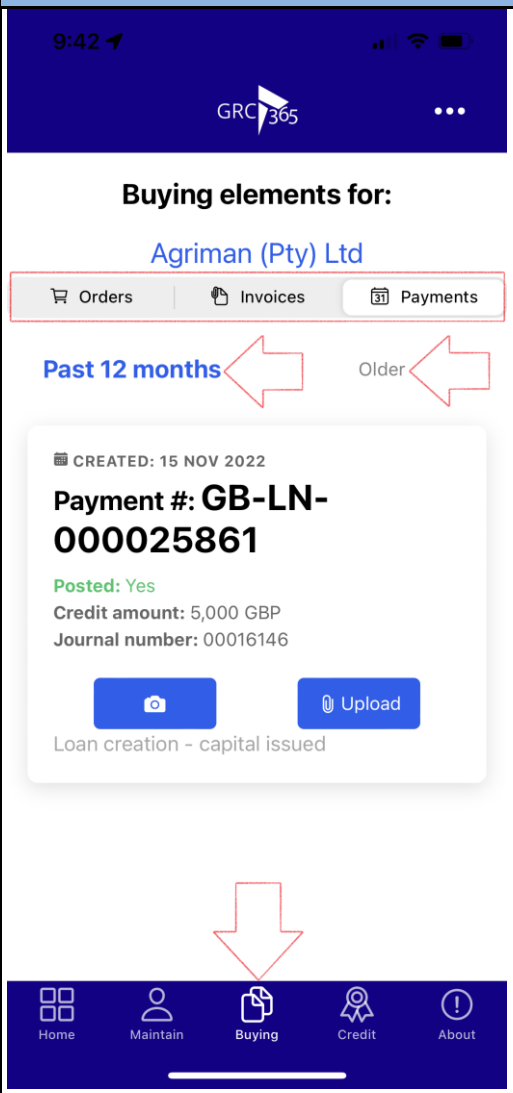
TALKING POINTS AND STEPS	MOBILE APP
After tapping on the **Login** button, the **Home** screen opens. The **Company name** (e.g., Agriman (Pty) Ltd) is displayed at the top of the screen. In the centre of the screen the following tiles are displayed: • **Active contracts**: Opens a list of contracts where the Customer account is specified and is marked as **Prime**, under the **Trading partners** Fast tab • **Sales orders:** A list of sales orders issued to the Customer • **Invoices:** A list of invoices that have been sent to the Customer • **Payments:** A list of all the payments made by the Customer • **Credit rating:** Opens the **Credit management** screen At the bottom of the screen: The **Balance** owed by the Customer is displayed • The **Home** tab: Takes the user back to the **Home** screen • The **Maintain** tab: The Customer information can be reviewed • The **Buying** tab: All Sales orders, Invoices and Payments can be viewed • The **Credit** tab: Opens the **Credit management** screen • The **About** tab: Displays some disclaimer information for using the mobile app Tap on **Graph** button in the bottom right hand side of the screen	

TALKING POINTS AND STEPS	MOBILE APP
An overview of all orders, invoices and receipts is displayed in the graph. To go back to the **Home** screen, tap on the arrow in the top left-hand side corner of the screen.	

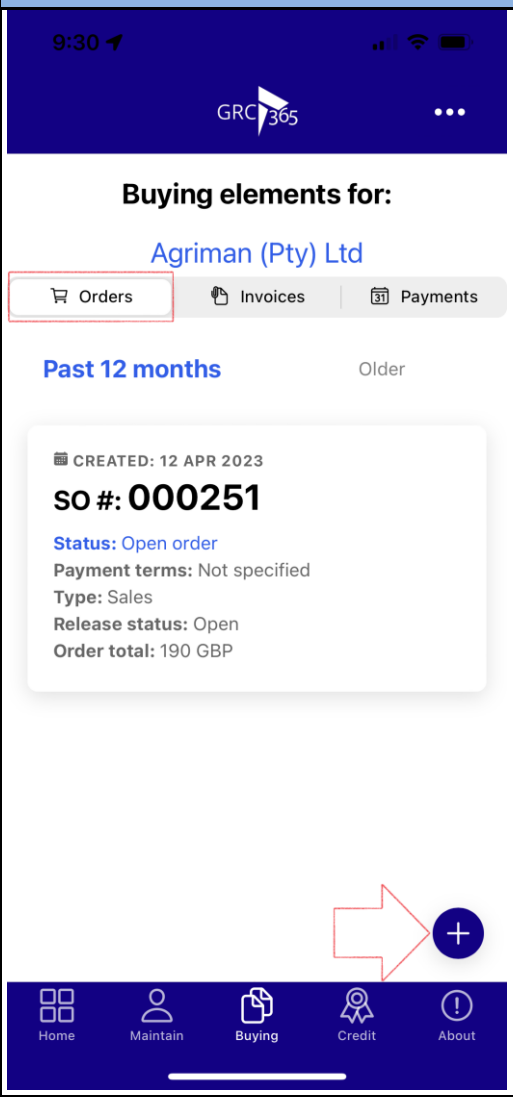
3.2 Reviewing the Customer details via the CSS mobile app

TALKING POINTS AND STEPS	MOBILE APP
Tap on the **Maintain** tab to view the Customer's details • The following **Customer details** can be viewed: ▪ The Customer's name ▪ The Customer's system-generated ID ▪ Phone number ▪ E-mail address ▪ Physical address ▪ Employee stats ▪ Customer operating currency • Tap on the **Edit** button to edit the Customer details • Tap on the **E-mail** button to send an e-mail to Takealot • Tap on the **Statement** button to request a statement from Takealot	

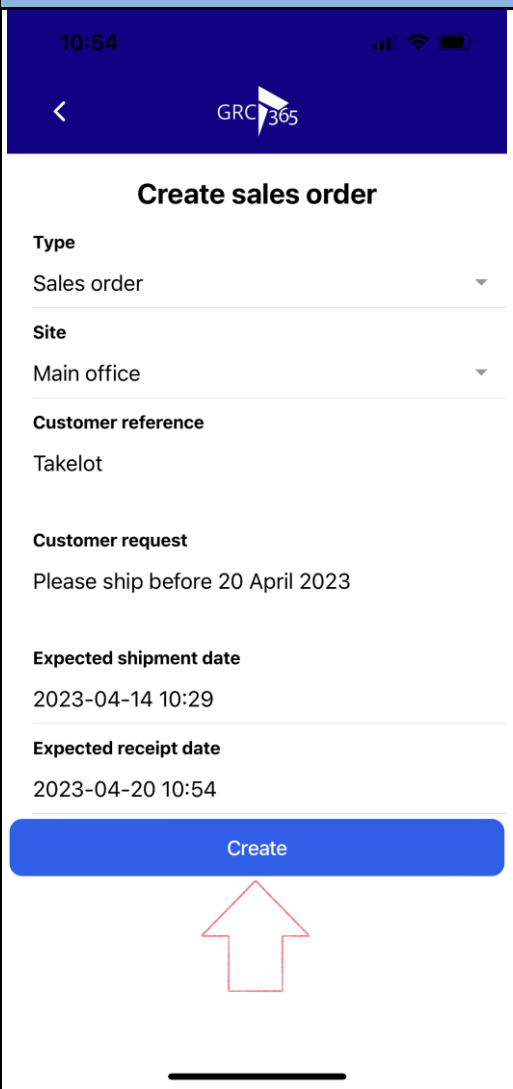
3.3 Buying elements

TALKING POINTS AND STEPS	MOBILE APP
The **Buying** tab opens the "**Buying elements for...**" screen By tapping on the tabs, the customer can view the following: • A list of **Orders** for the past 12 months or older • A list of **Invoices** for the past 12 months or older • A list of **Payments** for the past 12 months or older	

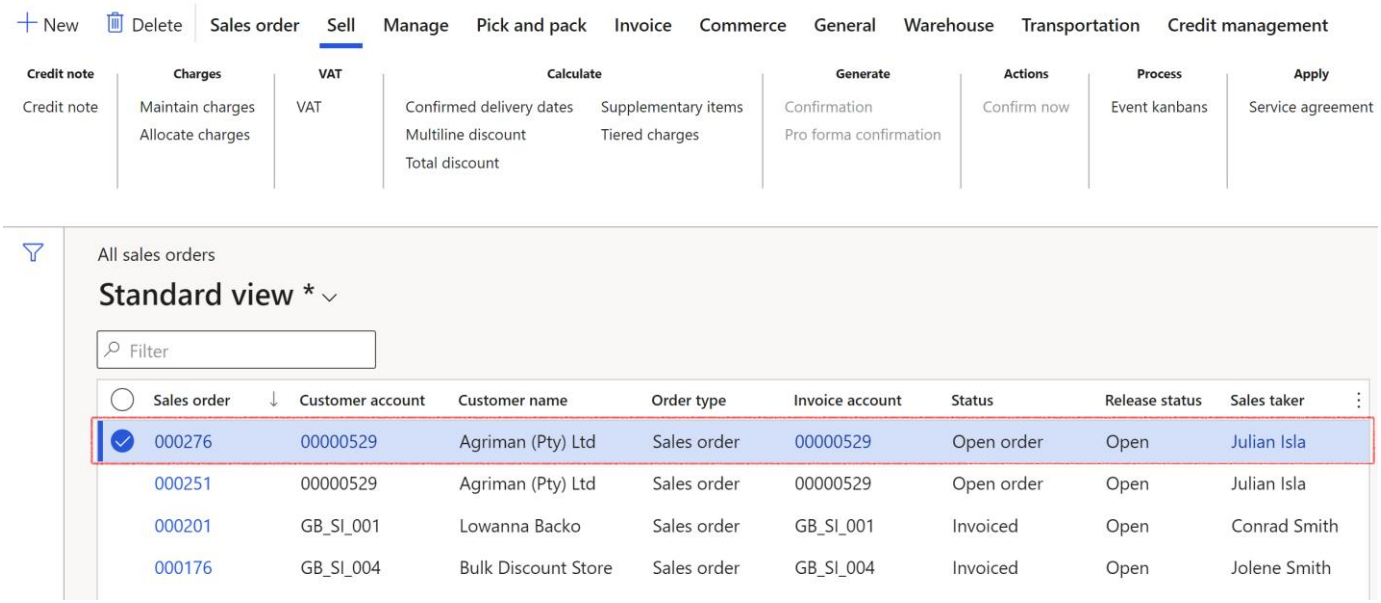
3.3.1. Sales orders

TALKING POINTS AND STEPS	MOBILE APP
The **Sales orders** tile displays the number of sales orders, and by tapping on the tile, the "**Buying elements for…**" screen opens The following **Sales order** details can be viewed for the past 12 months or older: • Created date • Sales order number • Payment terms • Type of order • Release status • Order total To create a new Sales order, tap on the **+** button in the bottom right hand corner of the screen	

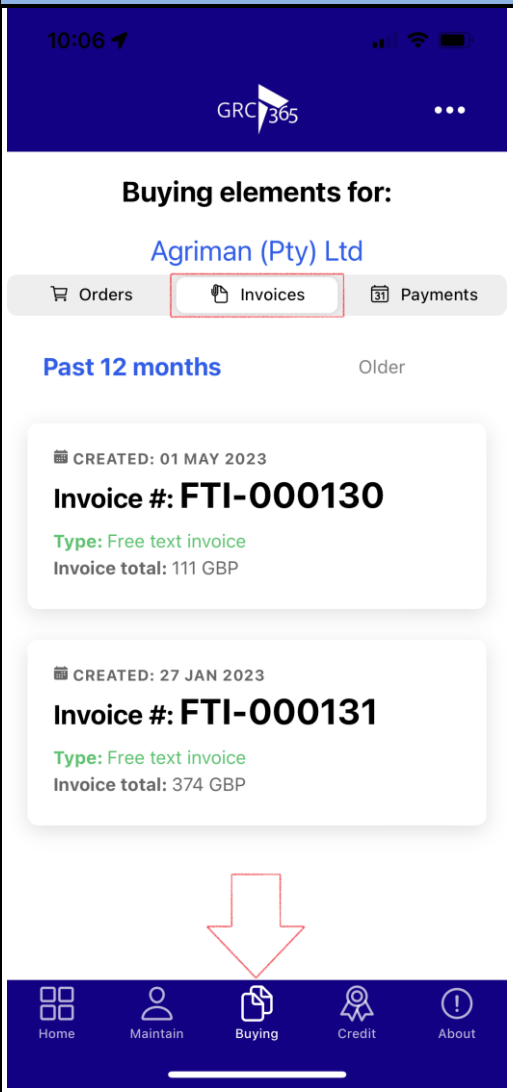
3.3.1.1 Create sales order

TALKING POINTS AND STEPS	MOBILE APP
Enter the following on the **Create sales order** screen: • Select the order **Type** from the list • Select the **Site** from the list • Enter the **Customer reference** • Enter the **Customer request** • Select the **Expected shipment date** • Select the **Expected receipt date** Tap on the **Create** button The new **Sales order** will be listed on the "**Buying elements for…**" screen, under the **Orders** tab	

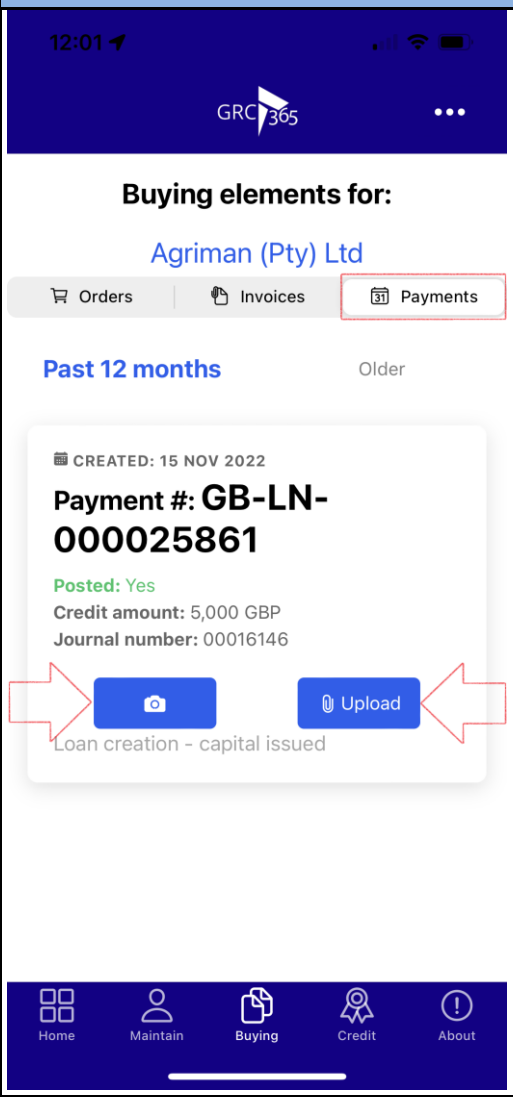
3.3.1.2 View the newly created sales order in D365

TALKING POINTS AND STEPS	DYNAMICS 365
The record can be viewed by the following the below path in Dynamics 365: **Sales and marketing>Sales orders>All sales orders** Click on the Sales order ID to see the details	

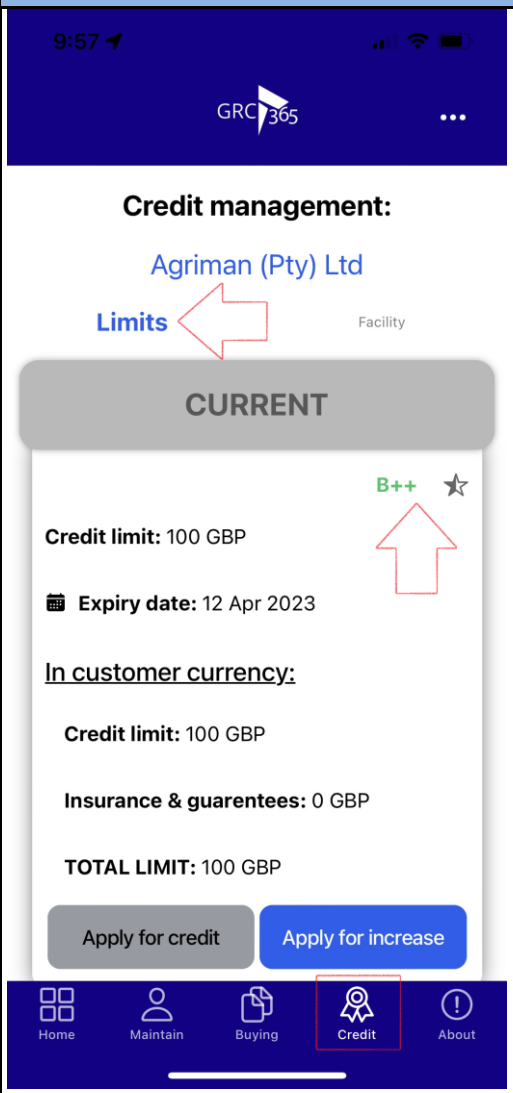
3.3.2. Invoices

TALKING POINTS AND STEPS	MOBILE APP
The **Invoices** tile displays the number of invoices, and by tapping on the tile, the "**Buying elements for...**" screen opens The following **Invoice** details can be viewed for the past 12 months or older: • Created date • Invoice number • Type of invoice • Invoice total	

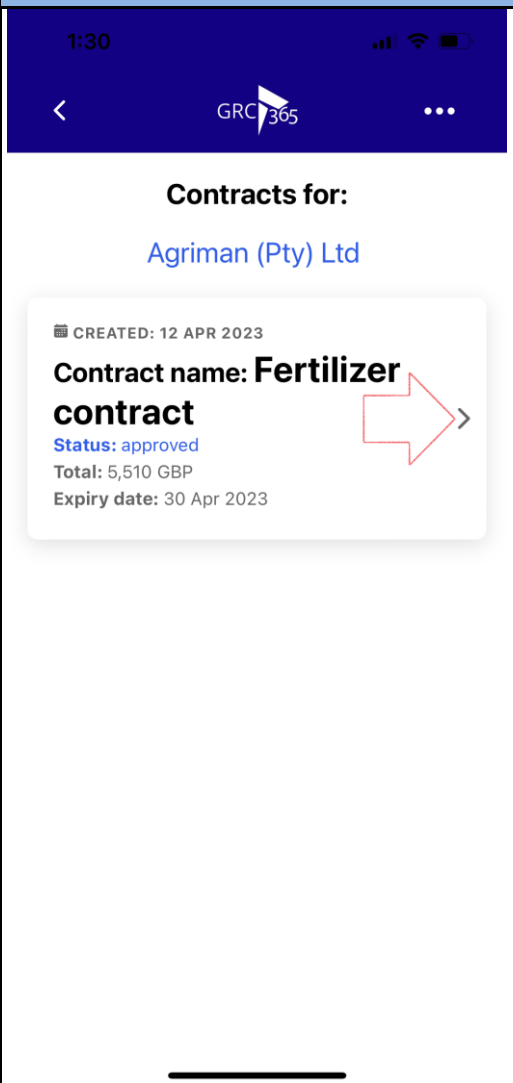
3.3.3. Payments

TALKING POINTS AND STEPS	MOBILE APP
The **Payments** tile displays the number of payments, and by tapping on the tile, the "**Buying elements for...**" screen opens The customer can view the following payment details for the past 12 months or older: • Created date • Payment number • Posted Yes/No • Credit amount • Journal number The user can tap on either the "**Camera**" button or the "**Upload**" button to send proof of payment to Takealot The image or file will be saved as an attachment to the record in D365	

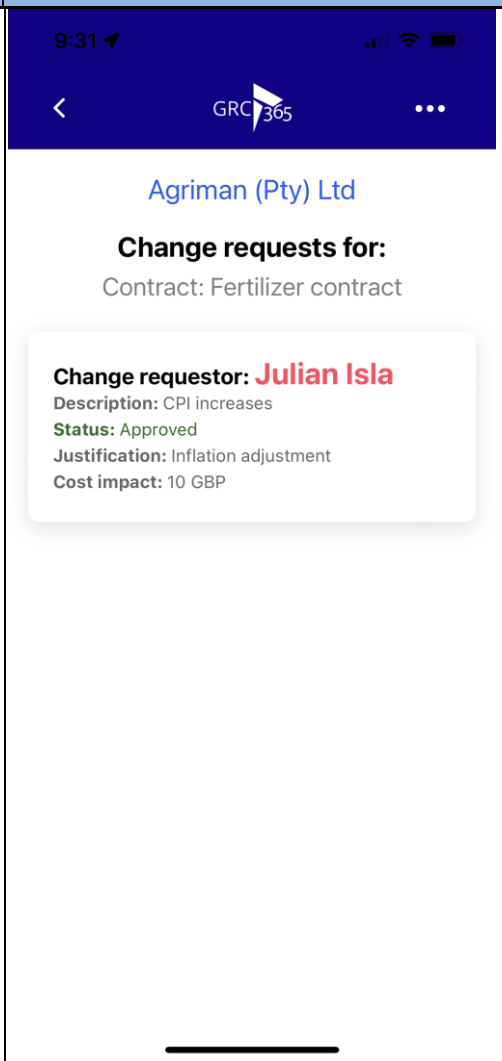
3.4 Credit management

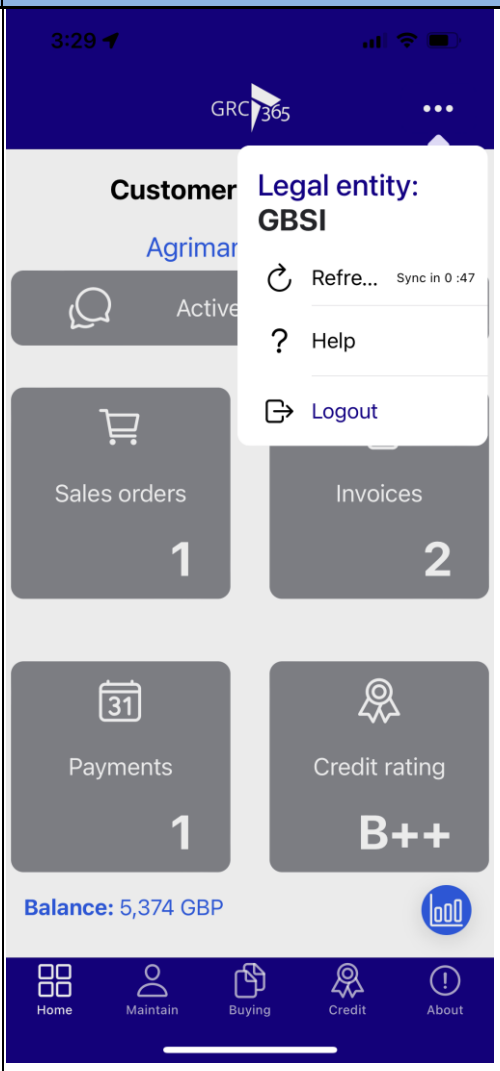
TALKING POINTS AND STEPS	MOBILE APP
The **Credit** tab and the **Credit rating** tile both open the **Credit management** screen On the **Credit management** screen, the following can be viewed: • Under the **Limits** tab: ▪ **Credit rating** as setup on the Customer's record in D365 ▪ **Credit limit** and **Expiry date** ▪ **Credit limit** in the Customer's currency ▪ **Insurance and guarantees** in the Customer's currency ▪ **The Total limit** in the Customer's currency ▪ The Customer can **Apply for credit** ▪ The Customer can **Apply for credit increase** • Under the **Facility** tab: ▪ Future release	

3.5 Active contracts

TALKING POINTS AND STEPS	MOBILE APP
On the Home screen, tap on the **Active contracts** tile All contracts that are active on "today's date", will be displayed The following details are visible for each contract: • **Created**: The date the contract was created • **Contract name** • **Status**: The approval status of the contract • **Total**: The value of the contract • **Expiry date**: The date the contract is set to expire To view the change requests for a contract, tap on the **arrow** on the contract	

3.5.1 Change requests

TALKING POINTS AND STEPS	MOBILE APP
The following details are displayed for each change request: • **Change requestor**: Name of the requester • **Description**: The reason for the change request • **Status**: The status of the change request • **Justification**: Justification for the change in the contract • **Cost impact**: The change in the contract value	

3.6 Options under the Ellipsis

TALKING POINTS AND STEPS	MOBILE APP
The **ellipsis** at the top of the screen provides the following functions: • Displays the **D365 Legal entity** that the user is currently logged into • The **Refresh data** button is used to update the app with recently captured data (via the app and D365) • The **Help** button opens the **Axnosis Contact Support** screen • **Logout**