



Demo script

Customer Self-service (CSS) Mobile App

Microsoft Dynamics 365 FO



Document Date:
2023-04-12

Document Status
Draft

Prepared by:
Noelene Cilliers

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

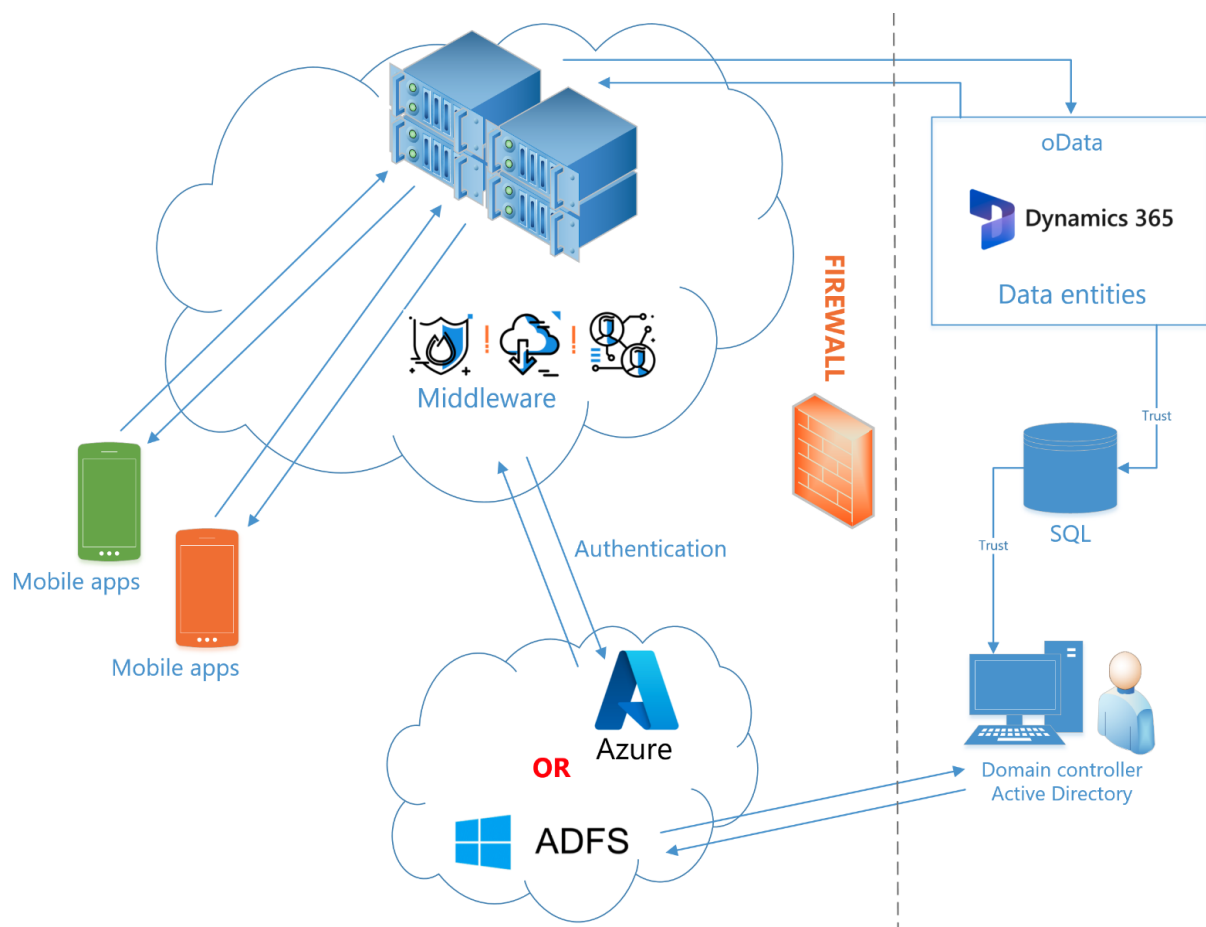
Table 2: Change and Version History

Table of Contents

FOREWORD	2
1. TECHNOLOGY	4
2. DEMO SETUP	5
2.1 SETUP INSIDE D365	6
2.2 BACKGROUND	6
2.3 SCENARIO	6
3. DEMO SCRIPT	7
3.1 LOG INTO THE CUSTOMER SELF-SERVICE (CSS) MOBILE APP	7
3.2 REVIEWING THE CUSTOMER DETAILS VIA THE CSS MOBILE APP.....	12
3.3 BUYING ELEMENTS	13
3.3.1 Sales orders	14
3.3.1.1 Create sales order.....	15
3.3.1.2 View the newly created sales order in D365.....	16
3.3.2 Invoices.....	17
3.3.3 Payments.....	18
3.4 CREDIT MANAGEMENT	19
3.5 ACTIVE CONTRACTS	20
3.5.1 CHANGE REQUESTS.....	21
3.6 OPTIONS UNDER THE ELLIPSIS	22

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

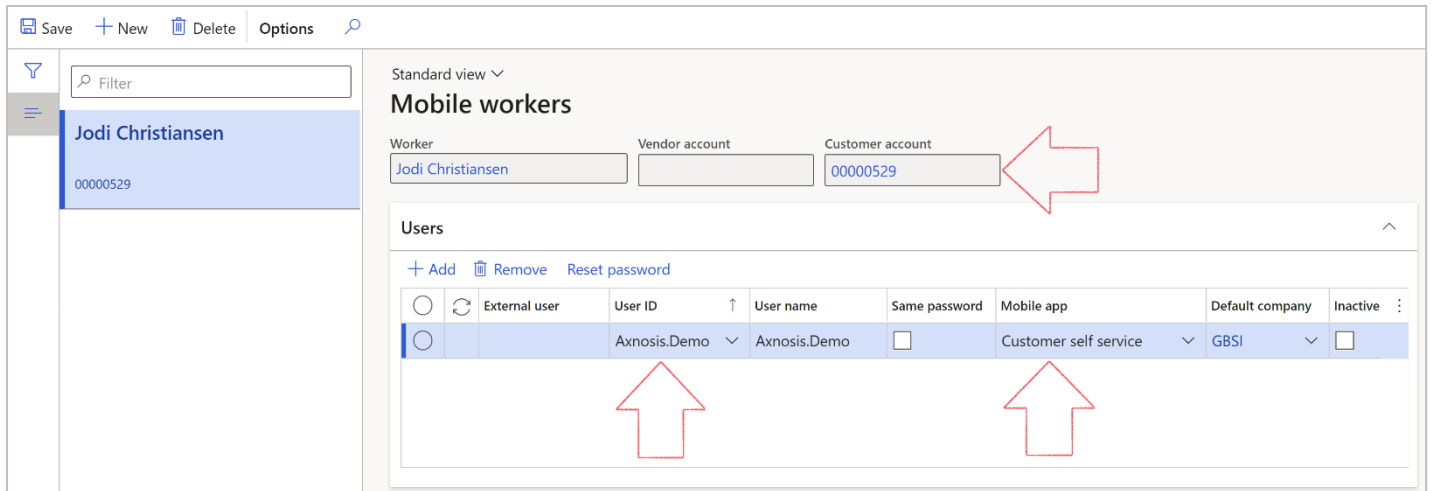
- This script is written for use with D365 for Finance and Operations and Axnosis Customer Self Service mobile app.
- The apps support both platforms



- 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

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



Standard view ▾

Mobile workers

Worker: Jodi Christiansen Vendor account: Customer account: 00000529

Users

+ Add Remove Reset password

External user	User ID	User name	Same password	Mobile app	Default company	Inactive
<input type="radio"/>	Axnosis.Demo	Axnosis.Demo	<input type="checkbox"/>	Customer self service	GBSI	<input type="checkbox"/>

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.

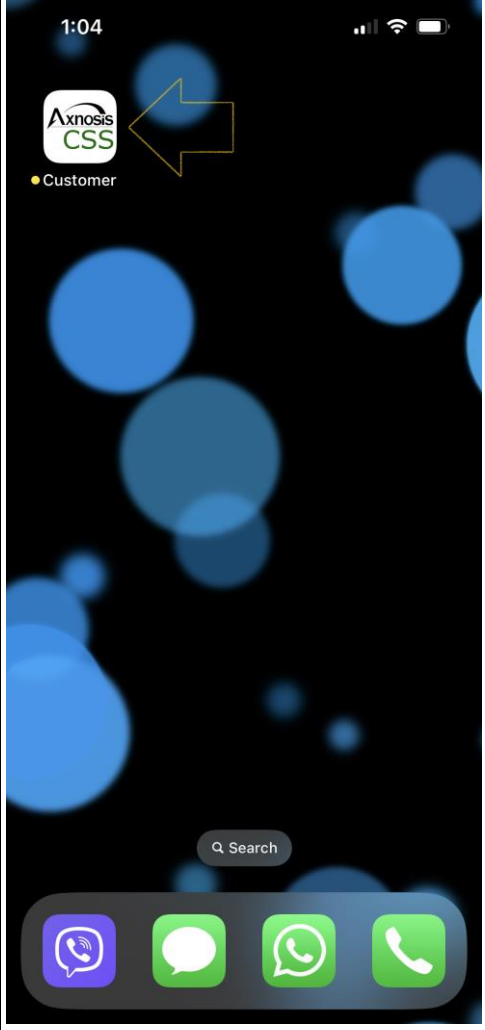
- It is assumed that the D365 GRC module is installed on D365.


2.3 Scenario

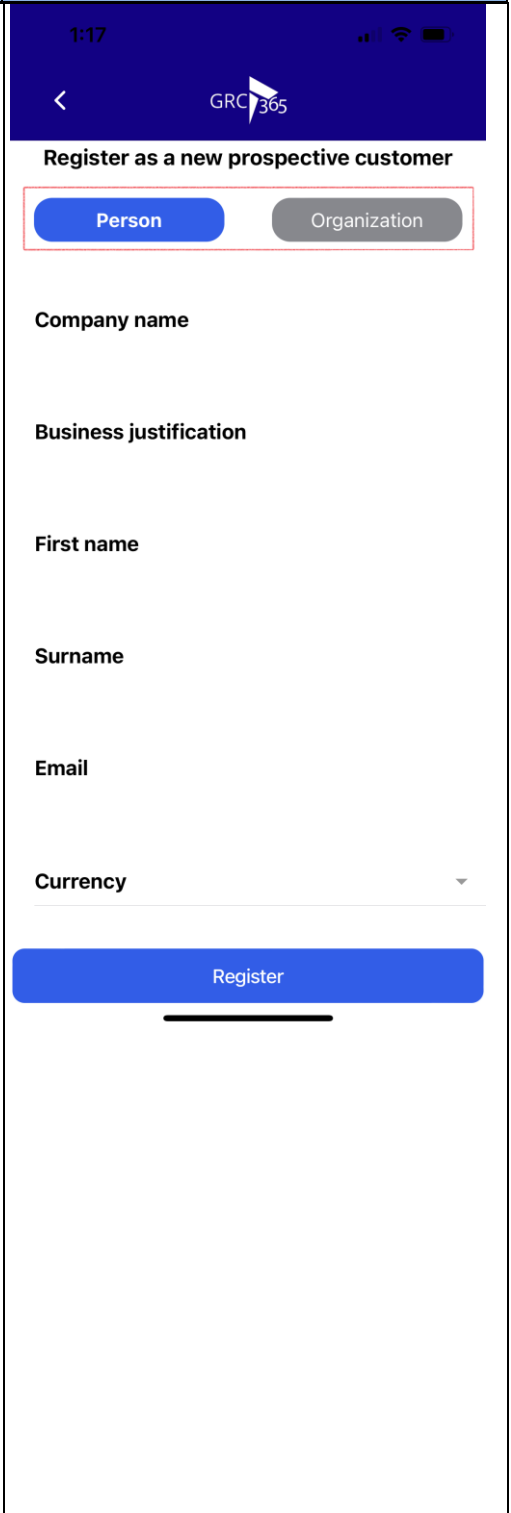
You are a customer (Agriman (Pty) Ltd), trading with Takelot. You have been given access by Takelot to view certain details applicable to your customer details in their system.

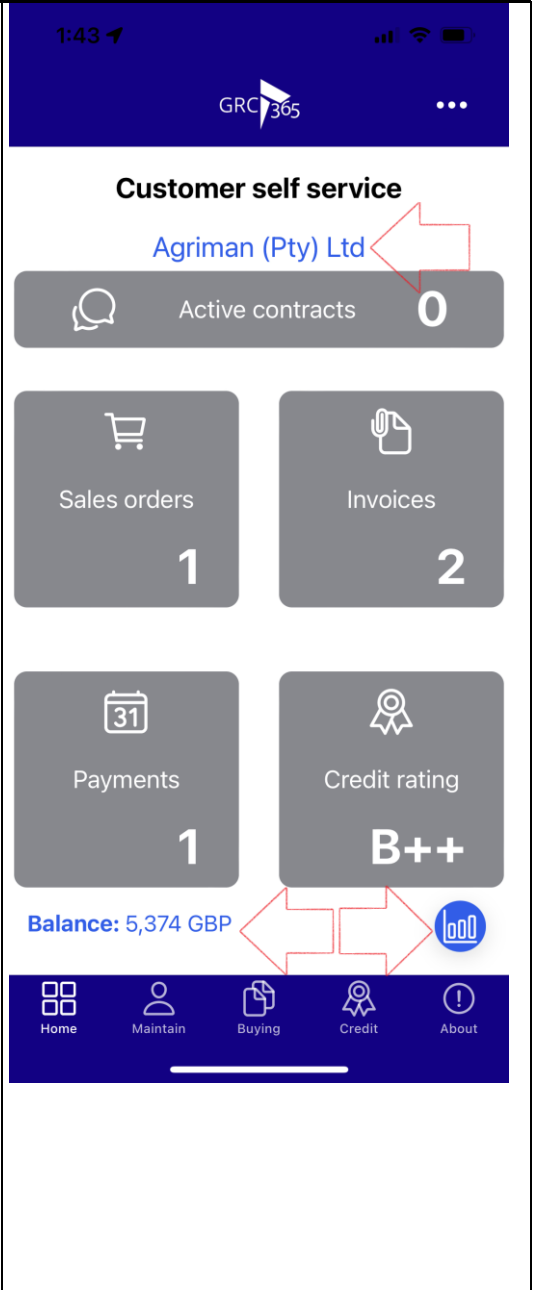
3. Demo script

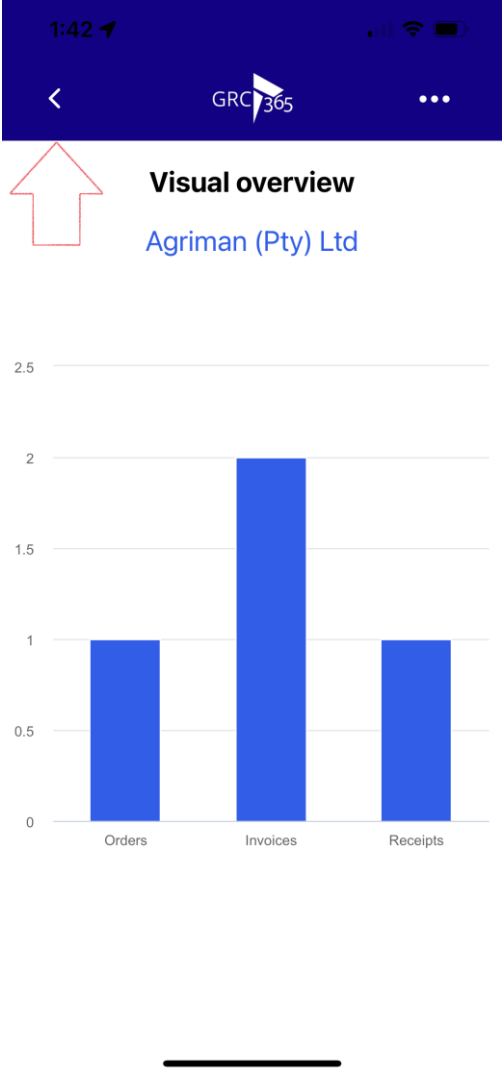
3.1 Log into the Customer Self-service (CSS) mobile app

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

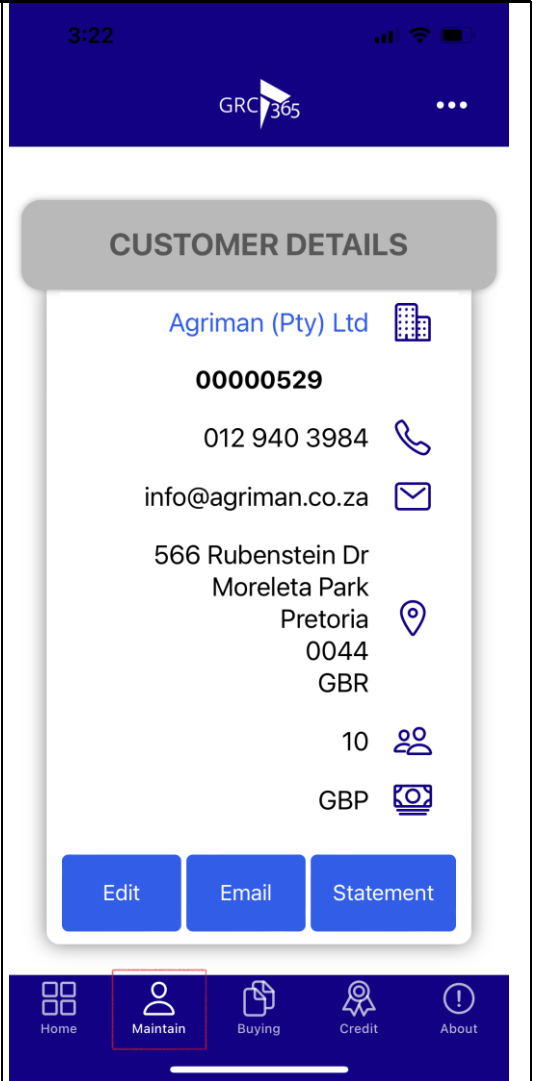
TALKING POINTS AND STEPS	MOBILE APP
<p>The logo on the login screen appears ...</p> <p>The user's D365 login details are entered and used by the app for validation.</p> <p>The user then taps on the Login button.</p> <p>If you have not yet registered as customer, tap on the Register button.</p>	 <p>The mockup shows a mobile app interface with the Axnosis logo at the top, followed by a handshake icon and the GRC 365 logo. Below these is the title 'D365 F&O Customer App' and a descriptive sentence: 'A compelling and productive way to manage your buying activities as a customer while on the move.' There are two input fields: 'Your@email.com' and 'Password'. At the bottom, there are 'Register' and 'Login' buttons, a 'Forgot password?' link, and a home indicator bar.</p>

TALKING POINTS AND STEPS	MOBILE APP
<p>On the Register as a new prospective customer screen, enter the following details:</p> <ul style="list-style-type: none"> • 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 <p>Tap on the Register button.</p> <p>A new record will be created in the "All prospects" table/form under the Sales and marketing module.</p> <ul style="list-style-type: none"> > Workspaces <ul style="list-style-type: none"> <ul style="list-style-type: none"> Customers <ul style="list-style-type: none"> All customers Recalculate credit limit Relationships <ul style="list-style-type: none"> Contacts Prospects <ul style="list-style-type: none"> All prospects ★ My prospects Converted prospects Imported prospect list Leads Opportunities 	

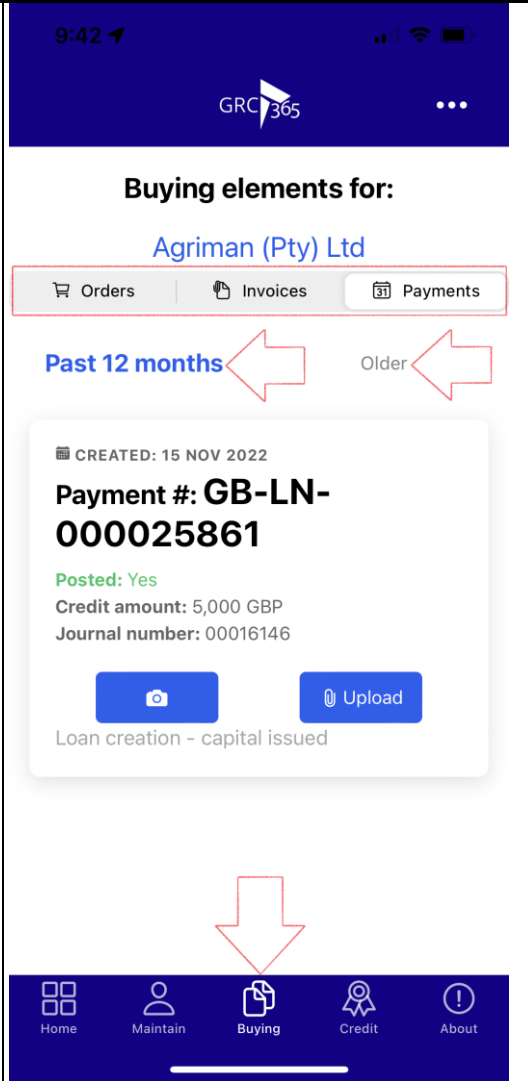
TALKING POINTS AND STEPS	MOBILE APP
<p>After tapping on the Login button, the Home screen opens.</p> <p>The Company name (e.g., Agriman (Pty) Ltd) is displayed at the top of the screen.</p> <p>In the centre of the screen the following tiles are displayed:</p> <ul style="list-style-type: none"> • Active 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 <p>At the bottom of the screen:</p> <p>The Balance owed by the Customer is displayed</p> <ul style="list-style-type: none"> • 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 <p>Tap on Graph button in the bottom right hand side of the screen</p>	

TALKING POINTS AND STEPS	MOBILE APP								
<p>An overview of all orders, invoices and receipts is displayed in the graph.</p> <p>To go back to the Home screen, tap on the arrow in the top left-hand side corner of the screen.</p>	 <p>Visual overview Agriman (Pty) Ltd</p> <table border="1"> <thead> <tr> <th>Category</th> <th>Count</th> </tr> </thead> <tbody> <tr> <td>Orders</td> <td>1</td> </tr> <tr> <td>Invoices</td> <td>2</td> </tr> <tr> <td>Receipts</td> <td>1</td> </tr> </tbody> </table>	Category	Count	Orders	1	Invoices	2	Receipts	1
Category	Count								
Orders	1								
Invoices	2								
Receipts	1								

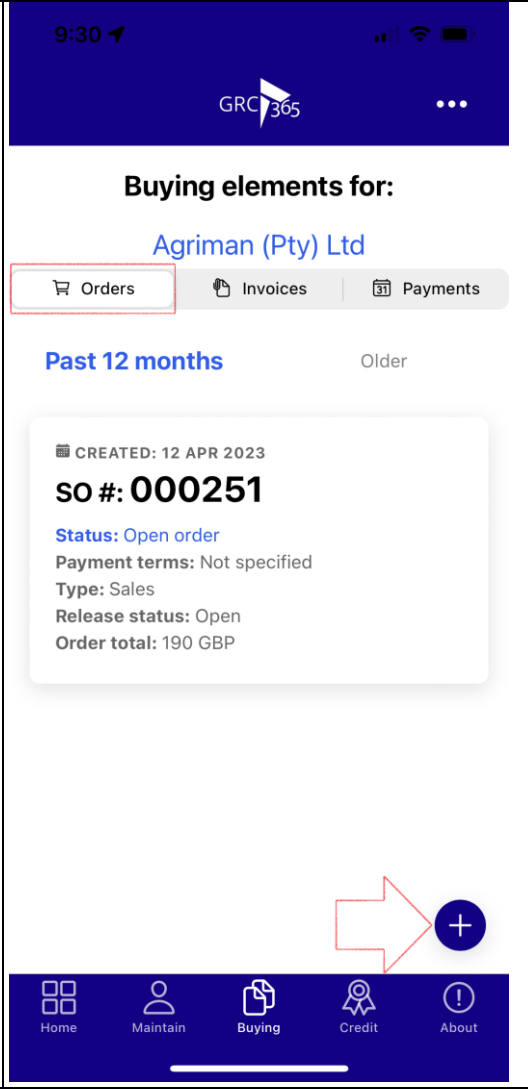
3.2 Reviewing the Customer details via the CSS mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the Maintain tab to view the Customer's details</p> <ul style="list-style-type: none"> The following Customer details can be viewed: <ul style="list-style-type: none"> 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 	

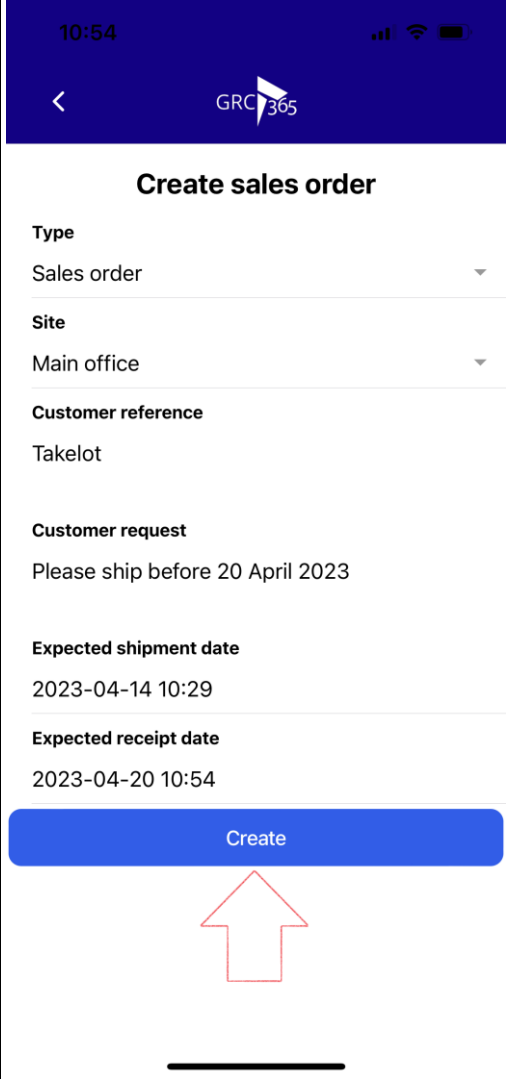
3.3 Buying elements

TALKING POINTS AND STEPS	MOBILE APP
<p>The Buying tab opens the “Buying elements for...” screen</p> <p>By tapping on the tabs, the customer can view the following:</p> <ul style="list-style-type: none"> • 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 	

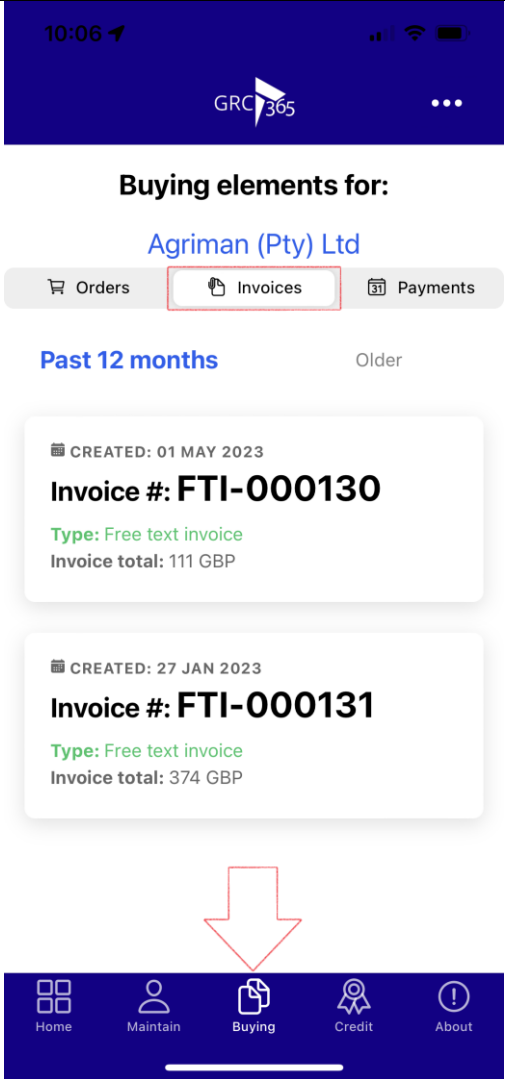
3.3.1. Sales orders

TALKING POINTS AND STEPS	MOBILE APP
<p>The Sales orders tile displays the number of sales orders, and by tapping on the tile, the "Buying elements for..." screen opens</p> <p>The following Sales order details can be viewed for the past 12 months or older:</p> <ul style="list-style-type: none"> • Created date • Sales order number • Payment terms • Type of order • Release status • Order total <p>To create a new Sales order, tap on the + button in the bottom right hand corner of the screen</p>	 <p>9:30</p> <p>GRC 365</p> <p>Buying elements for:</p> <p>Agriman (Pty) Ltd</p> <p>Orders Invoices Payments</p> <p>Past 12 months Older</p> <p>CREATED: 12 APR 2023</p> <p>so #: 000251</p> <p>Status: Open order</p> <p>Payment terms: Not specified</p> <p>Type: Sales</p> <p>Release status: Open</p> <p>Order total: 190 GBP</p> <p>Home Maintain Buying Credit About</p>

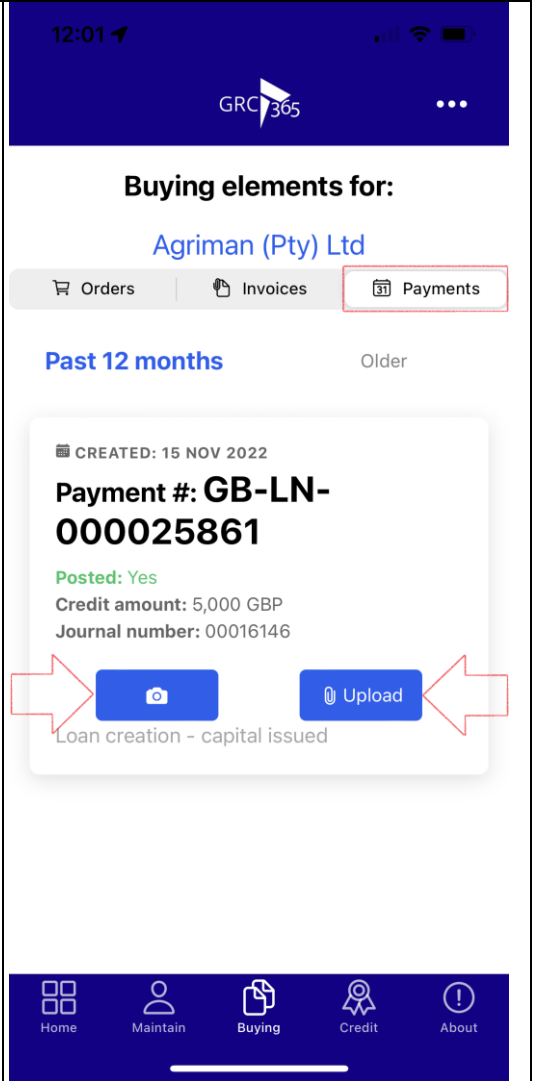
3.3.1.1 Create sales order

TALKING POINTS AND STEPS	MOBILE APP
<p>Enter the following on the Create sales order screen:</p> <ul style="list-style-type: none"> • 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 <p>Tap on the Create button</p> <p>The new Sales order will be listed on the “Buying elements for...” screen, under the Orders tab</p>	

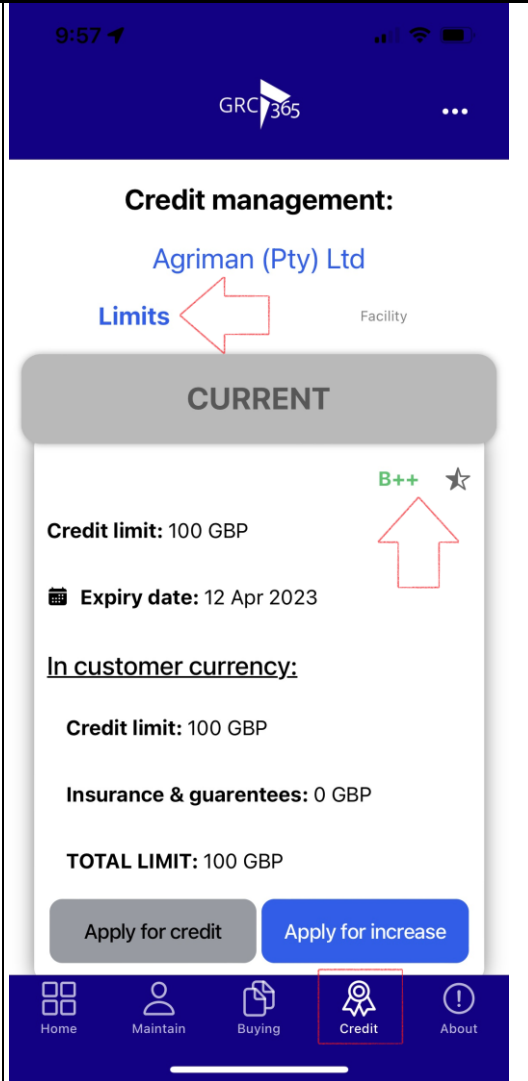
3.3.2. Invoices

TALKING POINTS AND STEPS	MOBILE APP
<p>The Invoices tile displays the number of invoices, and by tapping on the tile, the “Buying elements for...” screen opens</p> <p>The following Invoice details can be viewed for the past 12 months or older:</p> <ul style="list-style-type: none">• Created date• Invoice number• Type of invoice• Invoice total	

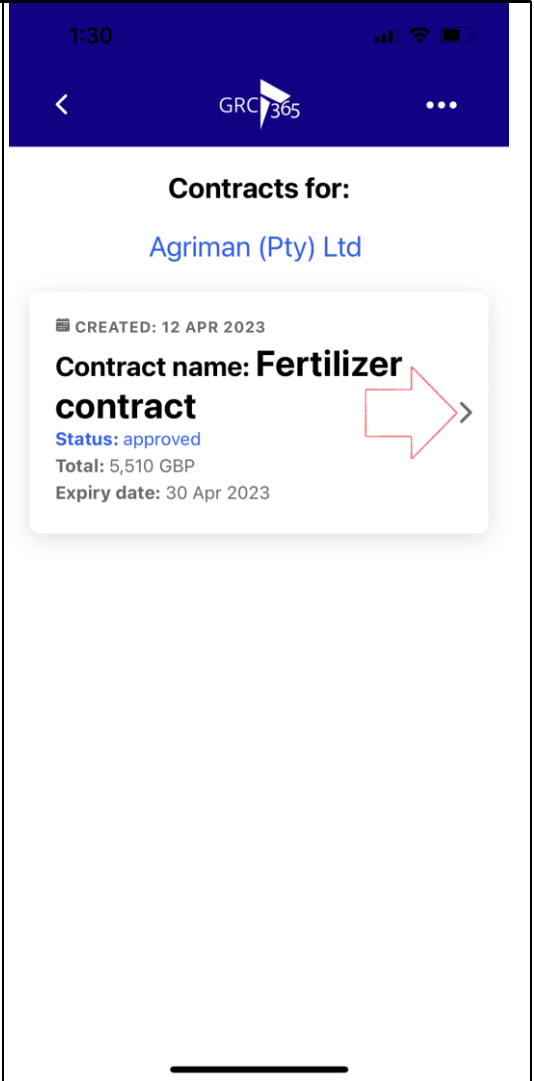
3.3.3. Payments

TALKING POINTS AND STEPS	MOBILE APP
<p>The Payments tile displays the number of payments, and by tapping on the tile, the "Buying elements for..." screen opens</p> <p>The customer can view the following payment details for the past 12 months or older:</p> <ul style="list-style-type: none"> Created date Payment number Posted Yes/No Credit amount Journal number <p>The user can tap on either the "Camera" button or the "Upload" button to send proof of payment to Takealot</p> <p>The image or file will be saved as an attachment to the record in D365</p>	

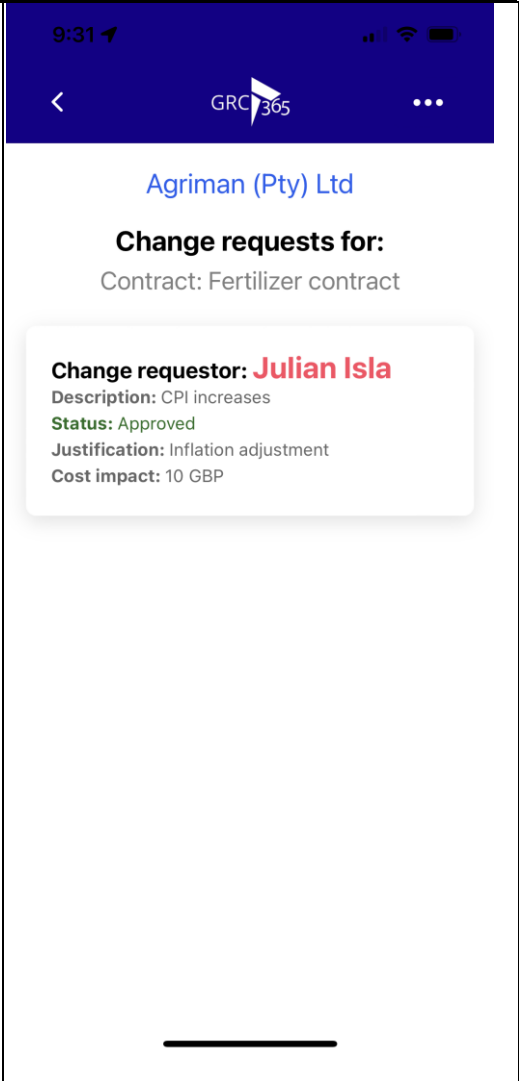
3.4 Credit management

TALKING POINTS AND STEPS	MOBILE APP
<p>The Credit tab and the Credit rating tile both open the Credit management screen</p> <p>On the Credit management screen, the following can be viewed:</p> <ul style="list-style-type: none"> Under the Limits tab: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Future release 	 <p>The screenshot shows the mobile app interface for 'Agriman (Pty) Ltd'. At the top, the status bar shows the time 9:57 and signal strength. Below the header, the 'Credit management' section is active. The 'Limits' tab is selected, indicated by a red arrow. The 'Facility' tab is also visible. The 'CURRENT' section displays the 'Credit limit: 100 GBP' and 'Expiry date: 12 Apr 2023'. A red arrow points to the 'Credit rating' tile, which shows 'B++' and a star icon. Below this, the 'In customer currency' section shows 'Credit limit: 100 GBP', 'Insurance & guarantees: 0 GBP', and 'TOTAL LIMIT: 100 GBP'. At the bottom, there are two buttons: 'Apply for credit' and 'Apply for increase'. The bottom navigation bar includes icons for Home, Maintain, Buying, Credit (highlighted with a red box), and About.</p>

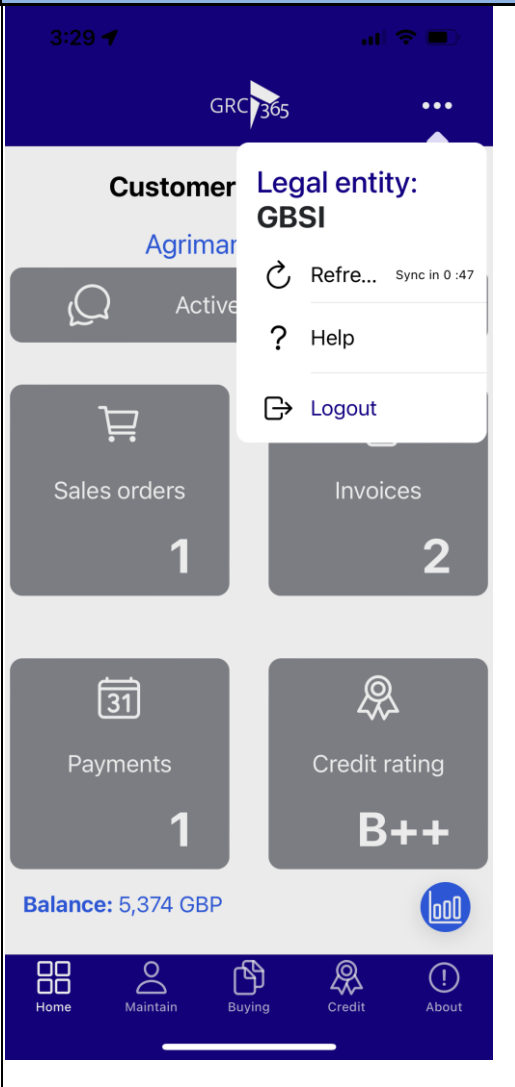
3.5 Active contracts

TALKING POINTS AND STEPS	MOBILE APP
<p>On the Home screen, tap on the Active contracts tile</p> <p>All contracts that are active on "today's date", will be displayed</p> <p>The following details are visible for each contract:</p> <ul style="list-style-type: none"> • 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 <p>To view the change requests for a contract, tap on the arrow on the contract</p>	 <p>The screenshot shows the mobile app interface. At the top, there's a status bar with the time 1:30 and signal indicators. Below that, a navigation bar shows a back arrow, the text 'GRC 365', and a menu icon. The main content area is titled 'Contracts for: Agriman (Pty) Ltd'. Below this, a card displays contract details: 'CREATED: 12 APR 2023', 'Contract name: Fertilizer contract', 'Status: approved', 'Total: 5,510 GBP', and 'Expiry date: 30 Apr 2023'. A large red arrow points to the right, indicating the next step to view change requests.</p>

3.5.1 Change requests

TALKING POINTS AND STEPS	MOBILE APP
<p>The following details are displayed for each change request:</p> <ul style="list-style-type: none"> • 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
<p>The ellipsis at the top of the screen provides the following functions:</p> <ul style="list-style-type: none"> 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 	 <p>The screenshot shows the mobile app interface. At the top, the status bar displays the time 3:29 and signal strength. Below the status bar, the app header shows 'GRC 365' and a three-dot menu icon. The main content area displays 'Customer Agrimar' and 'Active'. A menu is open, showing the following options: 'Legal entity: GBSI', 'Refresh data' (with a refresh icon and 'Sync in 0 :47'), 'Help' (with a question mark icon), and 'Logout' (with a door icon). Below the menu, there are four large buttons: 'Sales orders' (with a shopping cart icon and '1'), 'Invoices' (with a document icon and '2'), 'Payments' (with a calendar icon and '1'), and 'Credit rating' (with a ribbon icon and 'B++'). At the bottom, the 'Balance: 5,374 GBP' is displayed. The bottom navigation bar contains five icons: Home, Maintain, Buying, Credit, and About.</p>