



Demo script – Loans Mobile App

Microsoft Dynamics 365 FO TMS



Axnosis

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Microsoft Dynamics 365 FO TMS



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## Foreword

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It is highly desirable that a Loan mobile application be created to help automate and manage all processes of a loan application.

Such a loan application must:

- Be designed for all business sizes
- Be fully integrated with D365FO
- Simplify the creation of relationships between Sales ledger customers and Loans
- Provide a mobile platform for loan applications
- Authenticate accounts
- Check balances
- Support loan document management
- Calculate an Amortisation schedule
- Display standard graphs
- Enable users to view historic transactions

## Related Documentation

DOCUMENT NAME	DATE	REVISION	AUTHOR

Table 1: Related Documentation

## Change and Version History

DATE	VERSION	AUTHOR	CHANGES REQUESTED BY
12/03/2025	2	CONRAD SMITH	RIAAN VAN DER BERG

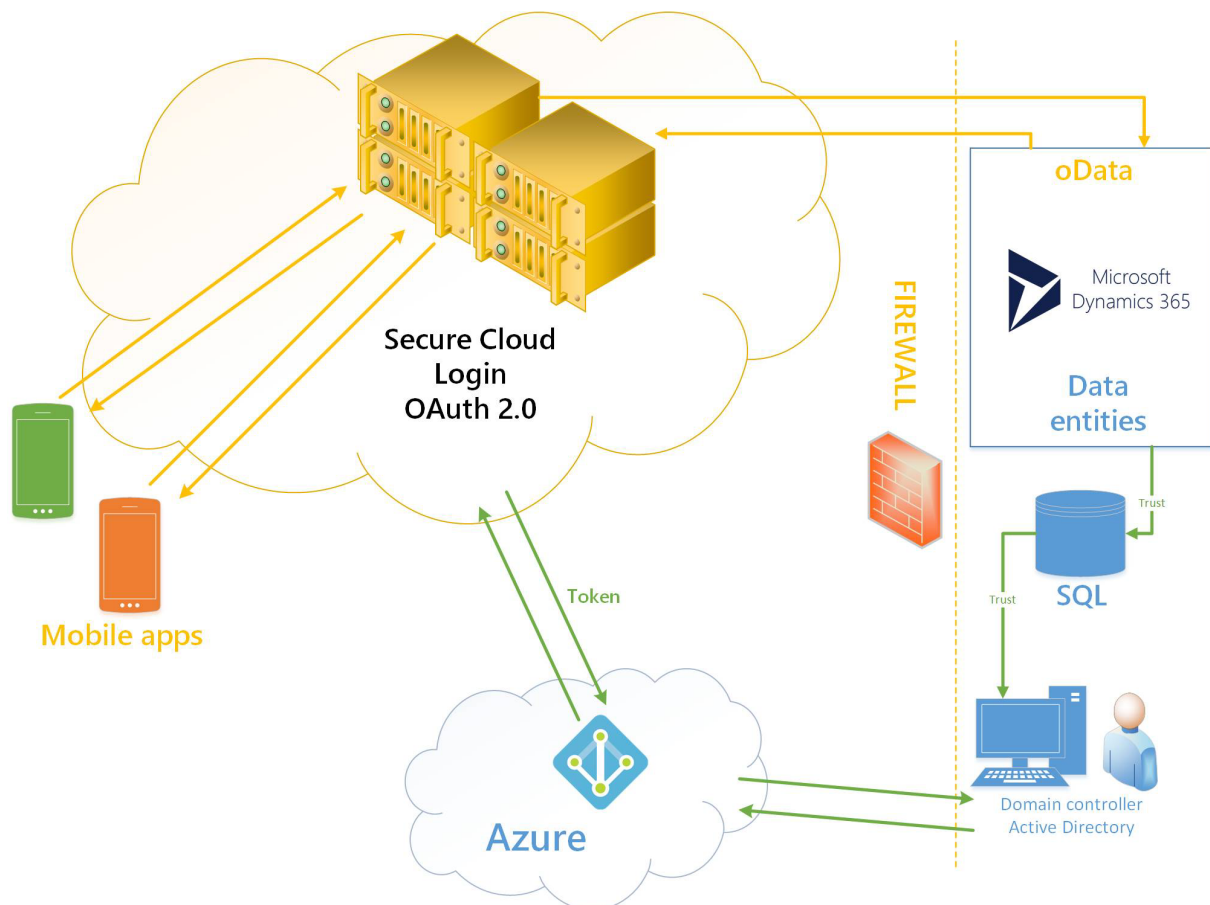
Table 2: Change and Version History

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## 1. Technology

- Microsoft Dynamics 365 (D365 for Finance and Operations)
  - TMS modules
- Ionic/Angular standalone applications
  - Loans mobile application



## 2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis' Loans mobile app.
- It is assumed that Axnosis' ISV module, TMS (Treasury Management System) is already installed and configured on your D365FO instance.
- The user has to download either of the following mobile applications, dependent on the phone type to be used:
  - Android (Samsung, etc.)
  - iOS (Apple)
- The apps can be downloaded from:
  - Android: PlayStore
  - iOS: TestFlight
- The user has to be logged into D365 for Finance and Operations:
  - 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 security role restrictions and legal entity allocations on D365 for Finance and Operations should be considered and applied on the mobile app sessions as well. The same user security roles will permit/exclude the user's right to capture events on the app.
- It is also assumed that the user must already be linked to a person and a customer in D365FO.
- 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
  - Remove all previous downloads of the application from the phone's download folder
  - Re-install the application and use

## 3. Demo script


### 3.1 Demo background and Scenarios

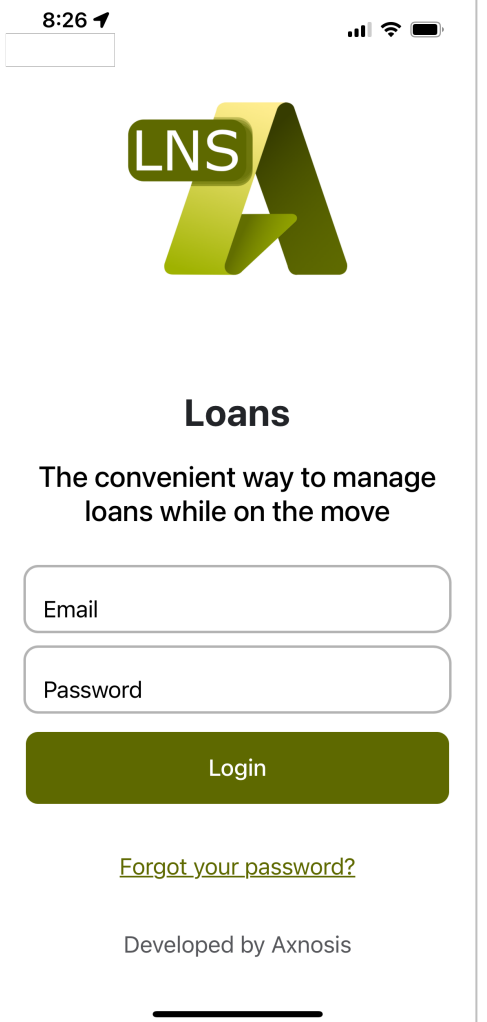
- Through this Loan mobile application, the recording of loans into D365 is easily done from any iOS or Android mobile device. Once loans have been applied for, loan administrators can evaluate and progress these records further within D365FO. Subsequently users are able to view changes to loans from their mobile devices.

Imagine the following scenario:

- Loan:
  - The applicant can conveniently use his/her mobile device and apply for a loan on D365FO.
  - The Loans mobile app enables the user to capture requirements on his/her mobile phone
  - The user can also view the detail of the loan application submitted, under pending loans
  - The user can also view any loans that have been declined, as the history will be stored
  - In closing, one will be able to view the loan created using the mobile device, in D365.

### 3.1.1 Logging into the Loans mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p><b>Applicant:</b></p> <p>The user takes his/her mobile phone out and taps on the <b>Loans</b> (LNS) icon.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>The logo on the <b>login</b> screen appears.</p> <p>The user's D365 login details (<b>User Name</b> and <b>Password</b>) are entered and used by the app for validation.</p> <p>The user then taps on the <b>Login</b> button to login to the app session.</p>	

If multi-factor authentication has been enabled for the organization, Microsoft sign in may require in addition to the application sign in. During the initial sign in, the Microsoft sign in may have to be completed twice.

The Microsoft sign in will not be required during every sign in to the mobile application. Sign in to Microsoft will be required during initial sign in; after sign in expiry and after a user has opted to manually sign out of the Laboratory application.

Enter the **Microsoft email account** and click on the **Next** button to continue.



## Sign in

julene.vaneeden@axnosis.com|

[Can't access your account?](#)

Next



Sign-in options

[Terms of use](#) [Privacy & cookies](#) ...

Enter the **password** for the Microsoft account entered.

Click on the **Sign in** button to continue.



← julene.vaneeden@axnosis.com

## Enter password

.....|

[Forgot my password](#)

Sign in

[Terms of use](#) [Privacy & cookies](#) ...


If multi-factor authentication is enabled, the **authentication number** may be displayed.

Take note of the number for entry in the authenticator app.



julene.vaneeden@axnosis.com

### Approve sign in request

 Open your Authenticator app, and enter the number shown to sign in.

88

No numbers in your app? Make sure to upgrade to the latest version.

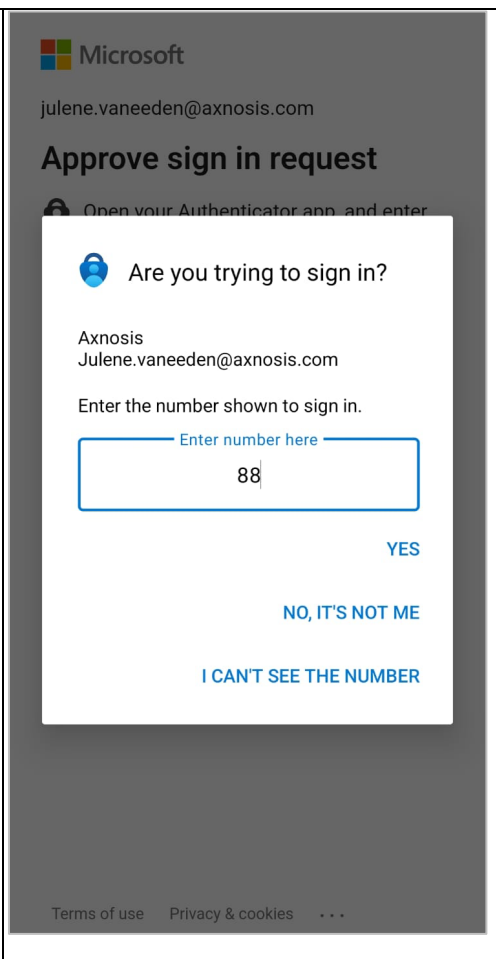
[I can't use my Microsoft Authenticator app right now](#)

[More information](#)

[Terms of use](#) [Privacy & cookies](#) ...

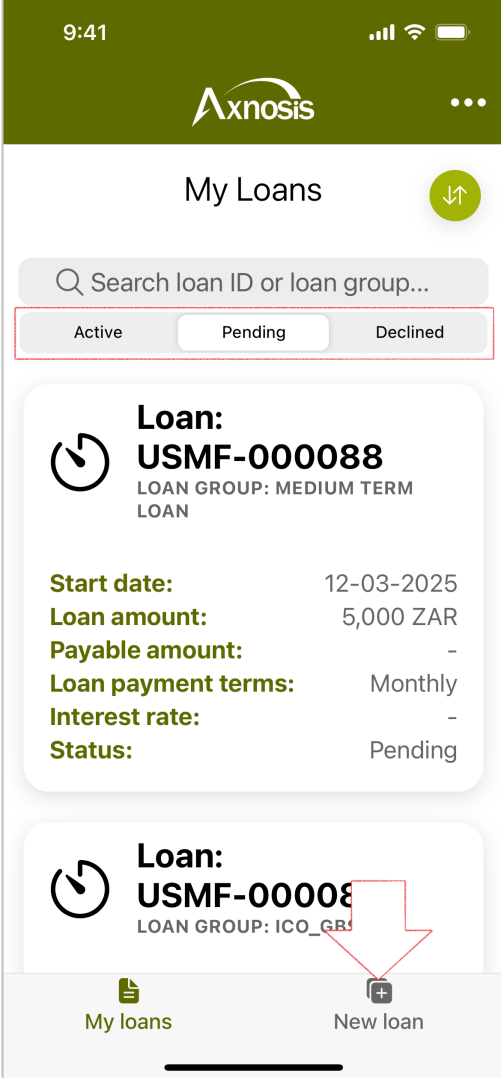
A notification may appear requiring the authentication number to be entered or the user may opt to access the authenticator app manually to complete the authentication process.

Enter the **authentication number** previously provided to approve the sign in then click on the **Yes** button to continue.

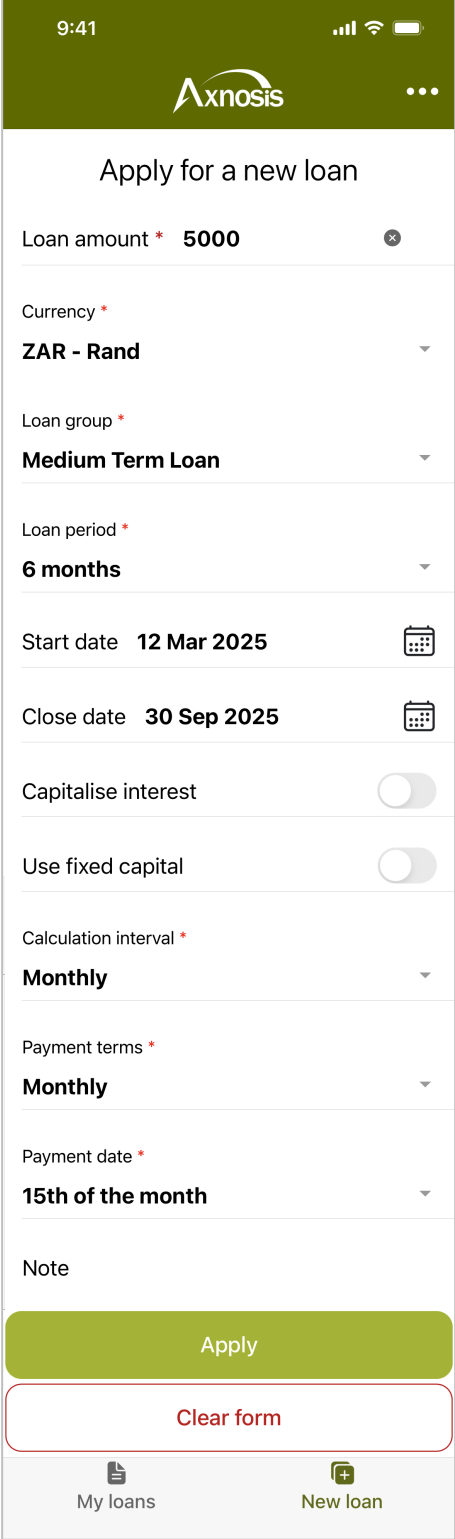


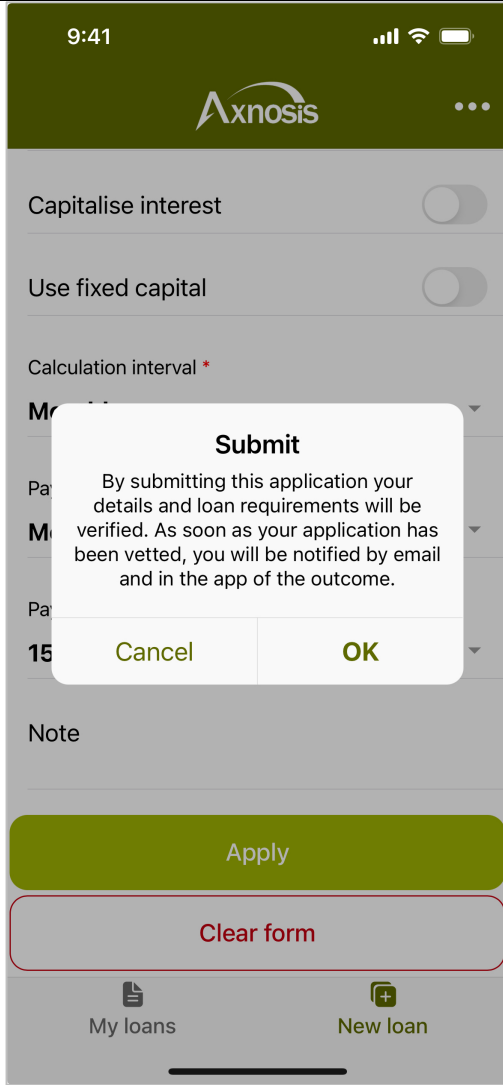
The screenshot shows a Microsoft Dynamics 365 FO TMS sign-in interface. At the top, the Microsoft logo is visible, followed by the email address 'julene.vaneeden@axnosis.com'. Below this, the heading 'Approve sign in request' is displayed. A sub-header reads 'Open your Authenticator app, and enter the number shown to sign in.' A white dialog box is centered on the screen with the title 'Are you trying to sign in?'. Inside the dialog, it shows 'Axnosis' and the email 'Julene.vaneeden@axnosis.com'. Below this, it says 'Enter the number shown to sign in.' and features a text input field with the placeholder 'Enter number here' and the value '88'. At the bottom of the dialog are three buttons: 'YES', 'NO, IT'S NOT ME', and 'I CAN'T SEE THE NUMBER'. At the very bottom of the screen, there are links for 'Terms of use', 'Privacy & cookies', and a three-dot menu icon.

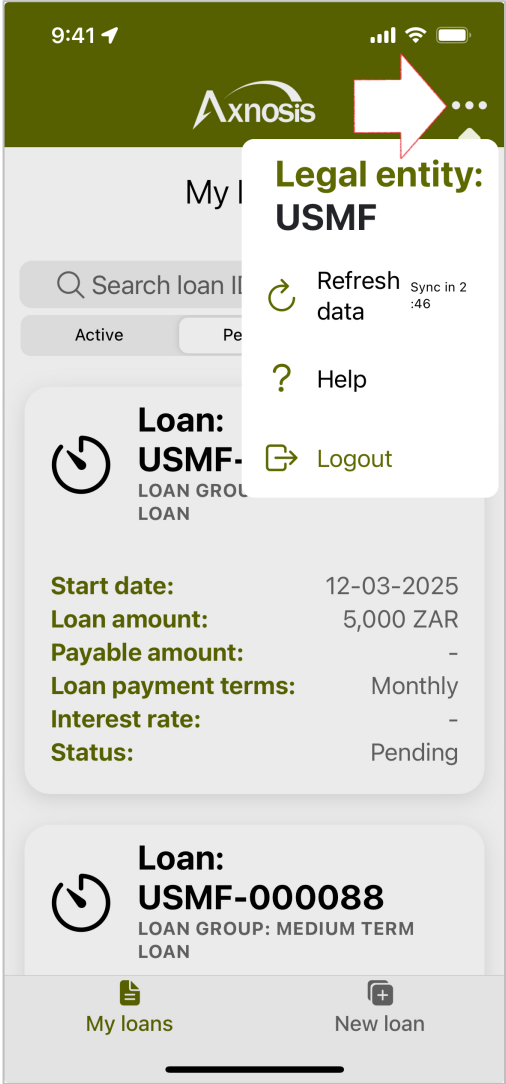
### 3.1.2 Recording a loan via the D365 Loans mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>The <b>My Loans</b> screen will open.</p> <p>The user can use the tabs to view the following:</p> <ul style="list-style-type: none"> <li>• <b>Active loans</b></li> <li>• <b>Pending loans</b></li> <li>• <b>Declined loans</b></li> </ul> <p>To apply for a new loan, tap on the <b>New loan</b> button at the bottom of the screen.</p>	

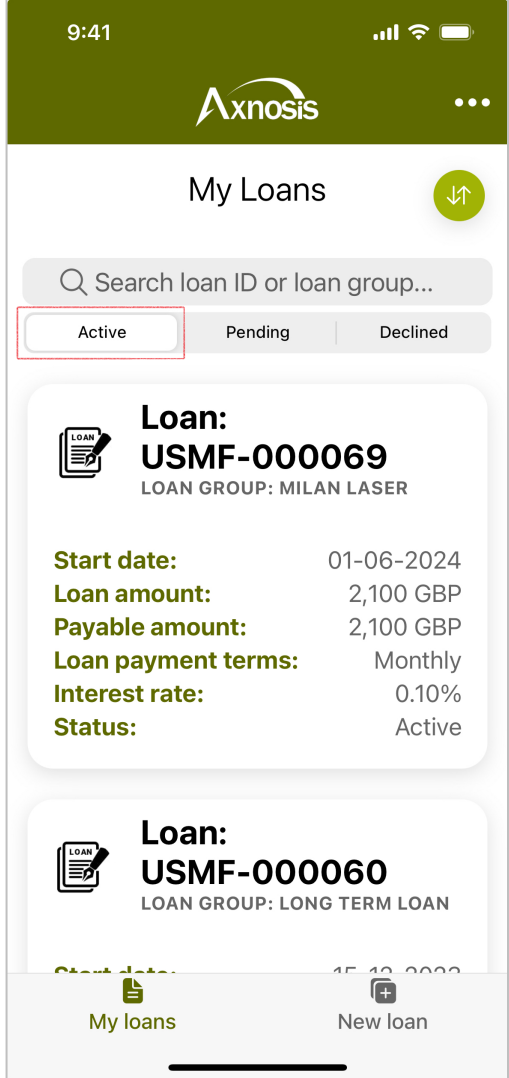
### 3.1.3 Recording a loan via the D365 Loans mobile app

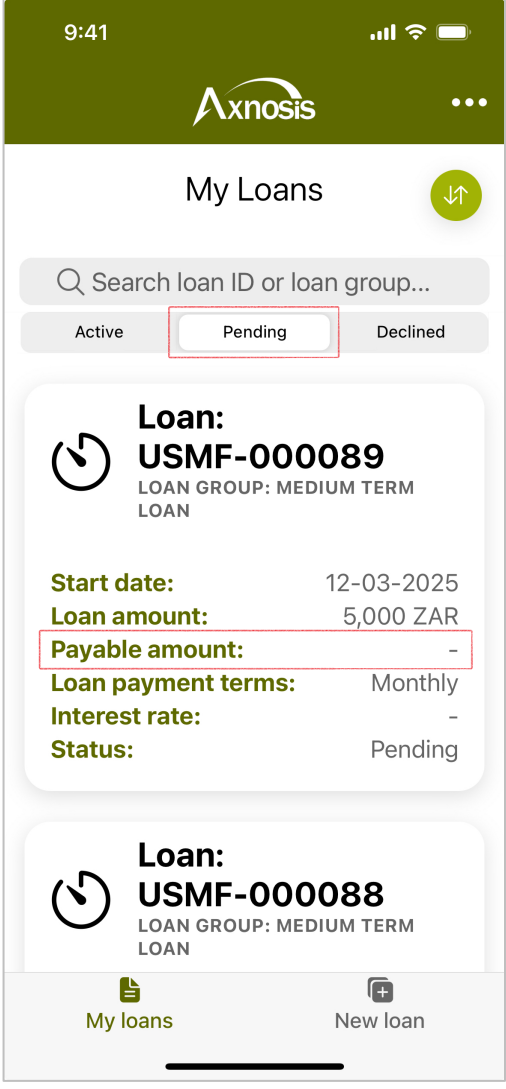
TALKING POINTS AND STEPS	MOBILE APP
<p>On the <b>Apply for a new loan</b> screen, enter the following:</p> <ul style="list-style-type: none"> <li>○ <b>Loan amount</b></li> <li>○ <b>Currency</b></li> <li>○ <b>Loan group</b></li> <li>○ Select the relevant <b>Loan period</b></li> <li>○ <b>Start date</b> and <b>Close date</b></li> <li>○ Select to <b>Capitalize interest</b> or not</li> <li>○ Select to use fixed <b>capital</b> or not</li> <li>○ <b>Select the relevant Calculation interval</b></li> <li>○ Select the relevant <b>Payment terms</b></li> <li>○ Select the relevant <b>Payment date</b></li> <li>○ Enter additional <b>Notes</b></li> </ul> <p>When done, tap on <b>Apply</b></p>	

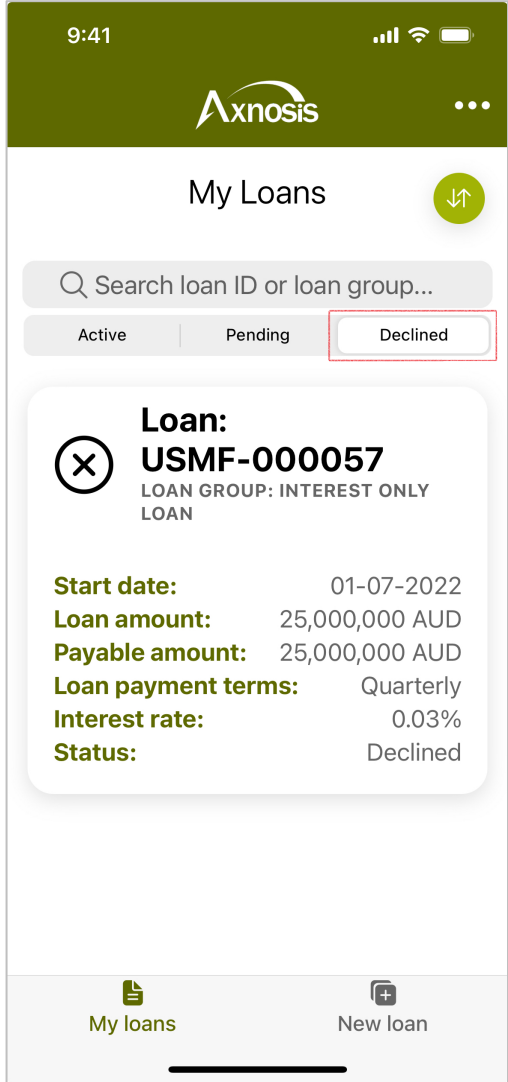
TALKING POINTS AND STEPS	MOBILE APP
<p>The following message appears:</p> <p><b>Submit</b></p> <p>By submitting this application your details and loan requirements will be verified.</p> <p>As soon as your application has been checked and approved or rejected, you will be <b>notified by email</b> and in the app of the outcome.</p> <p>Cancel / OK</p> <p>After tapping <b>OK</b>, a message will appear with the newly created loan number.</p> <p>To assist the process, the mobile app also supports offline functionality and engages directly with TMS 365 - a sub-module inside Dynamics 365 FO.</p>	

TALKING POINTS AND STEPS	MOBILE APP
At the top of the screen, tap on the ellipsis and tap on Refresh data.	

### 3.1.4 Viewing the loan details on the mobile device

TALKING POINTS AND STEPS	MOBILE APP
<p>The “<b>My loans</b>” is the default screen. The user can choose to see:</p> <ul style="list-style-type: none"> <li>• All <b>Active</b> loans</li> <li>• All <b>Pending</b> loans and</li> <li>• All <b>Declined</b> loans</li> </ul> <p>The “<b>Active</b>” loans screen will display the loan details, such as the</p> <ul style="list-style-type: none"> <li>• Loan start date,</li> <li>• Loan amount,</li> <li>• Payable amount,</li> <li>• Loan payment terms and</li> <li>• Interest rate</li> </ul>	

TALKING POINTS AND STEPS	MOBILE APP
<p>On the <b>Pending</b> loans screen the user can view all loans that are not approved or declined, and that are still in review.</p> <p>There will not be a payable amount visible, as the loan is still pending approval.</p>	

TALKING POINTS AND STEPS	MOBILE APP
<p>Declined loans page will display all loan applications that have been reviewed, but declined.</p> <p>Reason for declined loan applications:</p> <ol style="list-style-type: none"> <li>1. Credit report – credit history</li> <li>2. Debt review</li> <li>3. Incomplete documents</li> <li>4. Capacity</li> <li>5. Amount exceeded – Loan value too high</li> <li>6. Affordability: Debt-to-income ratio</li> <li>7. Insufficient collateral</li> <li>8. Guarantees</li> </ol>	



### 3.1.5 Viewing the “mobile created” loan inside D365

TALKING POINTS AND STEPS	DYNAMICS TMS 365 MODULE																																																																																				
<p><b>Loans register list page</b></p> <p>The mobile created loan can be viewed inside D365 – log into D365 and navigate to the <b>TMS module</b></p> <p><b>Treasury &gt; Loans &gt; Loans</b></p> <p>Select the Loan that you want to see the details of.</p> <p>After a loan application has been reviewed, it can be <b>Declined</b> or <b>Approved</b></p>	<div><div><div><div><div><div></div><div>Save</div><div>New</div><div>Delete</div></div><div>LoanBillingGeneralOptions</div><div></div></div><div>Loans</div><div>Standard view * ▾</div><div><div><div>Filter</div><div>Select companiesUSMF ▾</div></div><table><thead><tr><th></th><th>Loan number ▾</th><th>Company ▾</th><th>Loan receiver</th><th>Loan type</th><th>Start date</th><th>Loan direction</th><th>Current amount</th><th>Capital close</th><th>Total outstanding</th><th>Loan amount</th><th>Transaction currency ▾</th></tr></thead><tbody><tr><td></td><td>USMF-000089</td><td>usmf</td><td></td><td>Annuity loan</td><td>3/12/2025</td><td>Receivable</td><td>0.00</td><td>0.00</td><td>0.00</td><td>5,000.00</td><td>ZAR</td></tr><tr><td></td><td>USMF-000088</td><td>usmf</td><td></td><td>Annuity loan</td><td>3/12/2025</td><td>Receivable</td><td>0.00</td><td>0.00</td><td>0.00</td><td>5,000.00</td><td>ZAR</td></tr><tr><td><input checked="" type="checkbox"/></td><td>USMF-000087</td><td>usmf</td><td>USMF RECEIVER ▾</td><td>Interest instalment</td><td>2/1/2025</td><td>Payable ▾</td><td>31,000.00</td><td>100,000.00</td><td>50,000.00</td><td>0.00</td><td>GBP</td></tr><tr><td></td><td>USMF-000086</td><td>usmf</td><td>USMF RECEIVER</td><td>Interest instalment</td><td>2/1/2025</td><td>Payable</td><td>70,000.00</td><td>150,000.00</td><td>100,000.00</td><td>0.00</td><td>GBP</td></tr><tr><td></td><td>USMF-000085</td><td>usmf</td><td></td><td>Interest instalment</td><td>11/15/2024</td><td>Payable</td><td>5,000.00</td><td>5,000.00</td><td>0.00</td><td>5,000.00</td><td>GBP</td></tr><tr><td></td><td>USMF-000084</td><td>usmf</td><td></td><td>Interest instalment</td><td>11/15/2024</td><td>Payable</td><td>0.00</td><td>0.00</td><td>0.00</td><td>5,000.00</td><td>GBP</td></tr></tbody></table></div></div></div></div>		Loan number ▾	Company ▾	Loan receiver	Loan type	Start date	Loan direction	Current amount	Capital close	Total outstanding	Loan amount	Transaction currency ▾		USMF-000089	usmf		Annuity loan	3/12/2025	Receivable	0.00	0.00	0.00	5,000.00	ZAR		USMF-000088	usmf		Annuity loan	3/12/2025	Receivable	0.00	0.00	0.00	5,000.00	ZAR	<input checked="" type="checkbox"/>	USMF-000087	usmf	USMF RECEIVER ▾	Interest instalment	2/1/2025	Payable ▾	31,000.00	100,000.00	50,000.00	0.00	GBP		USMF-000086	usmf	USMF RECEIVER	Interest instalment	2/1/2025	Payable	70,000.00	150,000.00	100,000.00	0.00	GBP		USMF-000085	usmf		Interest instalment	11/15/2024	Payable	5,000.00	5,000.00	0.00	5,000.00	GBP		USMF-000084	usmf		Interest instalment	11/15/2024	Payable	0.00	0.00	0.00	5,000.00	GBP
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