



Demo script

Vendor Self-service (VSS) Mobile App

Microsoft Dynamics 365 FO



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Foreword

The Vendor Self-service (Collaboration) Mobile App creates a portal for integration between the Vendor and Customer. The Mobile App allows the Vendor to communicate with the Customer through the app and gather necessary information on the go.

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
07/03/2025	2	KAYLEN VAN DER BERG	RIAAN VAN DER BERG

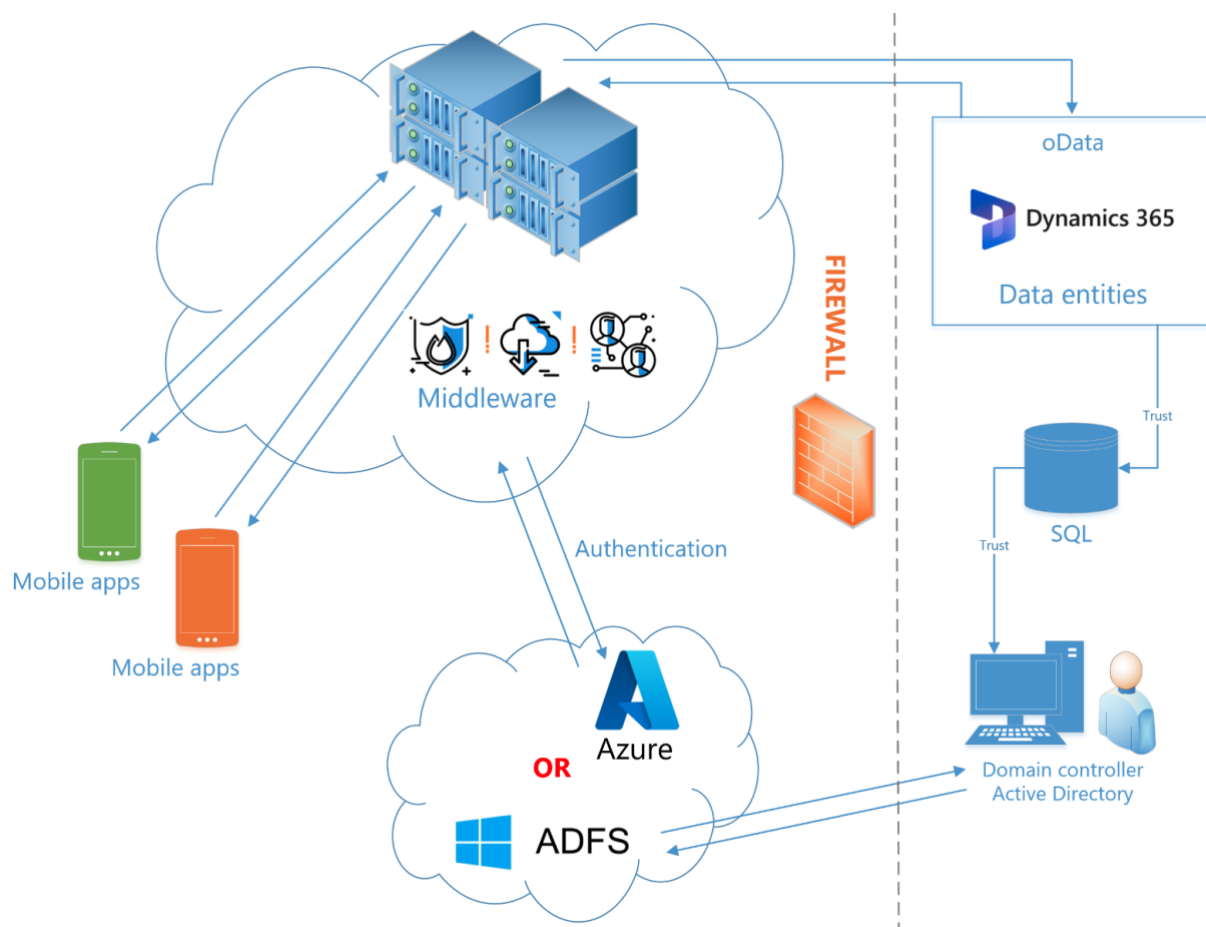
Table 2: Change and Version History

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1. Technology

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



2. Demo setup

- This script is written for use with D365 for Finance and Operations and Axnosis Vendor 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

Finance and Operations				
Search for a page				
Options				
Vendor collaboration users				
Standard view				
Filter				
Name	Alias	Vendor account	Name	
Erin Hagens	ErinH@contosoax7.onmicrosoft.com	US-104	Fabrikam Supplier bbbbbb	
Julian Isla	demo@axnosis.com	GB_SI_000001	Consumer Equipment	
Eli Bowen	apple@axnosis.com	AirCarrier	Air Cargo Carrier	
David	axuser1@axnosis.com	100004	Axnosis 123	

Make sure that the Axnosis.Demo user is in Company **GBSI**

Finance and Operations						
System administration > Users > Users						
< Save + New Delete Import users Maintain versions Batch import User options Options						
Users						
Standard view						
Filter						
	User ID	User name	Email	Company	Person	
	Axnosis.Demo	Axnosis.Demo	demo@axnosis.com	GBSI	Julian Isla	



2.2 Background

Axnosis Vendor Self-service ('VSS') Mobile App is a fully featured mobile solution for Microsoft Dynamics 365 F&O that works with giving selected and crucial information through to a Vendor of a Dynamics 365 Customers. Users can view the current items that the Customer has recorded against the Vendor, such as Company Information, RFQ's, Purchase Order's, Invoices, Payments and Contracts.

The app also allows the Vendor to communicate with the Customer D365 instance when for example a new invoice is being issued. Vendors have the opportunity to create and invoice or upload certain information of the invoice in to Dynamics 365. Vendors can also send photos or files regarding above mentioned company documents through using the app.

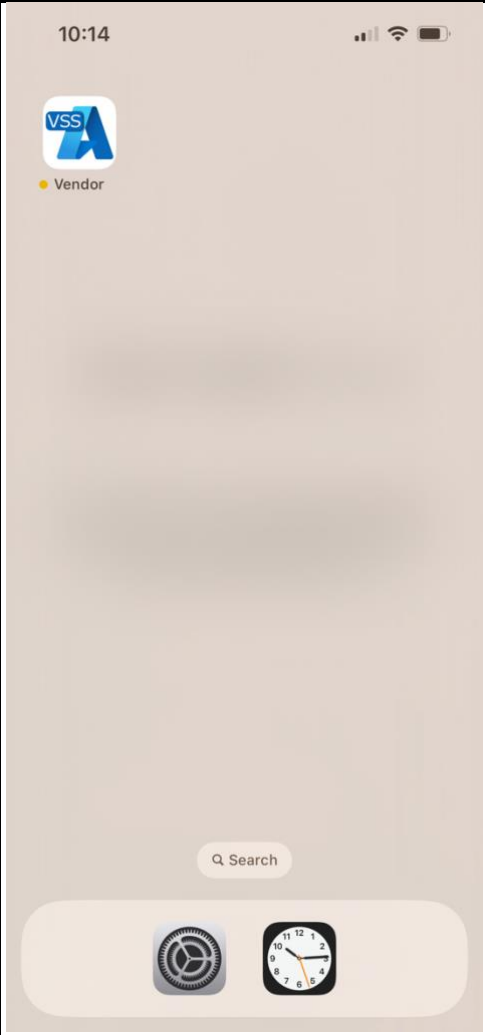
- It is assumed that the D365 GRC module is installed on D365.

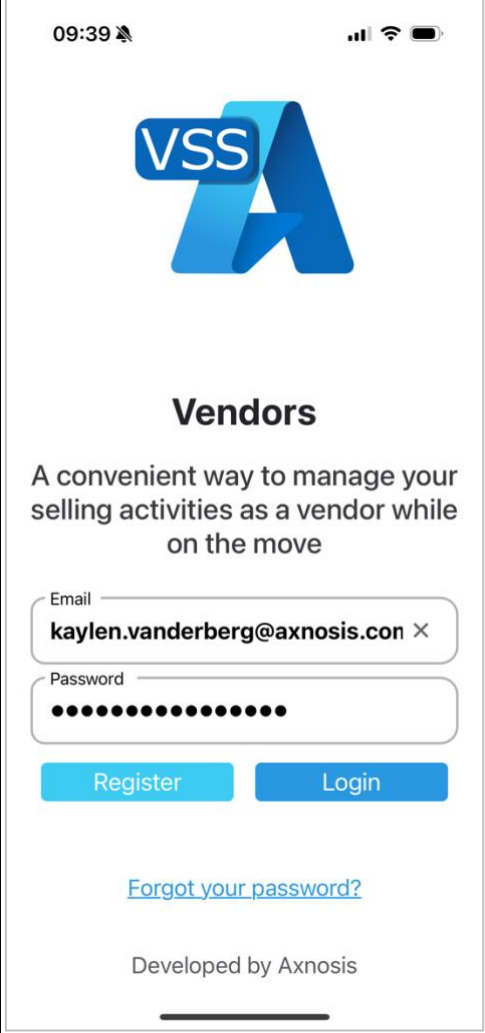
2.3 Scenario

You are a vendor (company name Consumer Equipment) trading with Contoso Consulting GB (GBSI) – the Customer. You have been given access by GBSI, to view certain details applicable to your vendor details in their system.

3. Demo script

3.1 Log into the Vendor Self-service (VSS) mobile app

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

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 to log into the app session.</p> <p>If you have not yet registered as vendor, tap on the Register button.</p>	

If multi-factor authentication has been enabled for the organization, Microsoft sign in may be required 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.

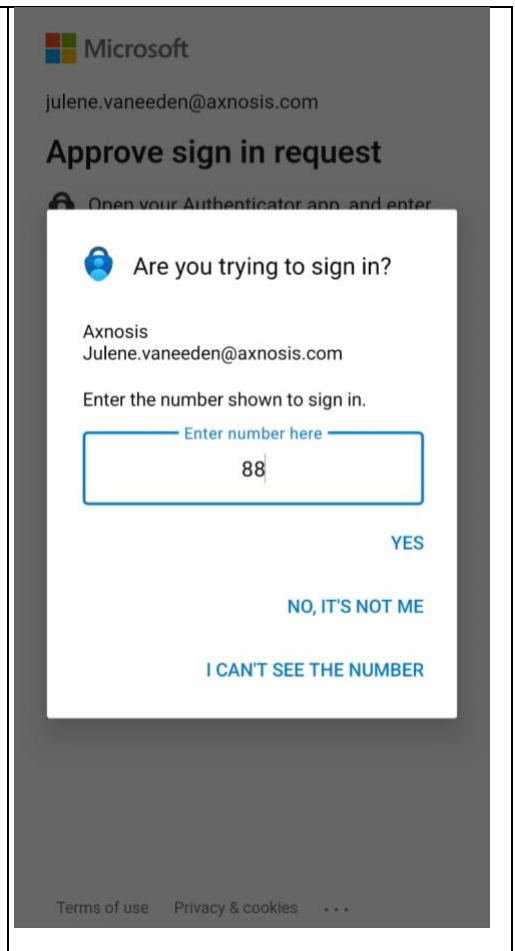
[I can't use my Microsoft Authenticator app right now](#)

[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.

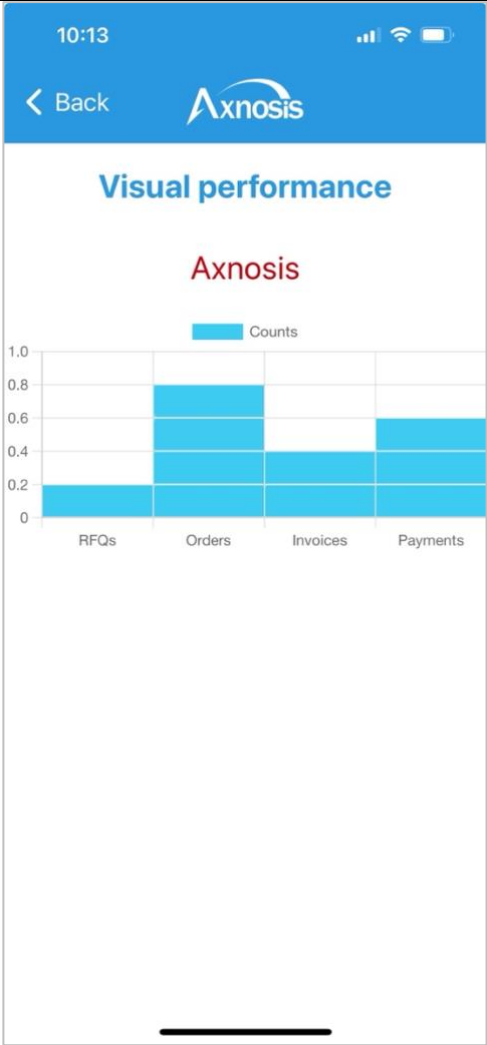
Enter the **authentication number** previously provided to approve the sign in then click on the **Yes** button to continue.




The screenshot shows a Microsoft Dynamics 365 FO mobile app interface. At the top, the Microsoft logo is visible, followed by the email address 'julene.vaneeden@axnosis.com'. The main heading is 'Approve sign in request'. Below this, there is a prompt to 'Open your Authenticator app, and enter'. A white modal box is overlaid on the screen with the title 'Are you trying to sign in?'. It lists 'Axnosis' and 'Julene.vaneeden@axnosis.com'. It asks the user to 'Enter the number shown to sign in.' and provides a text input field with the number '88'. Below the input field are three buttons: 'YES', 'NO, IT'S NOT ME', and 'I CAN'T SEE THE NUMBER'. At the bottom of the screen, there are links for 'Terms of use', 'Privacy & cookies', and a three-dot menu icon.

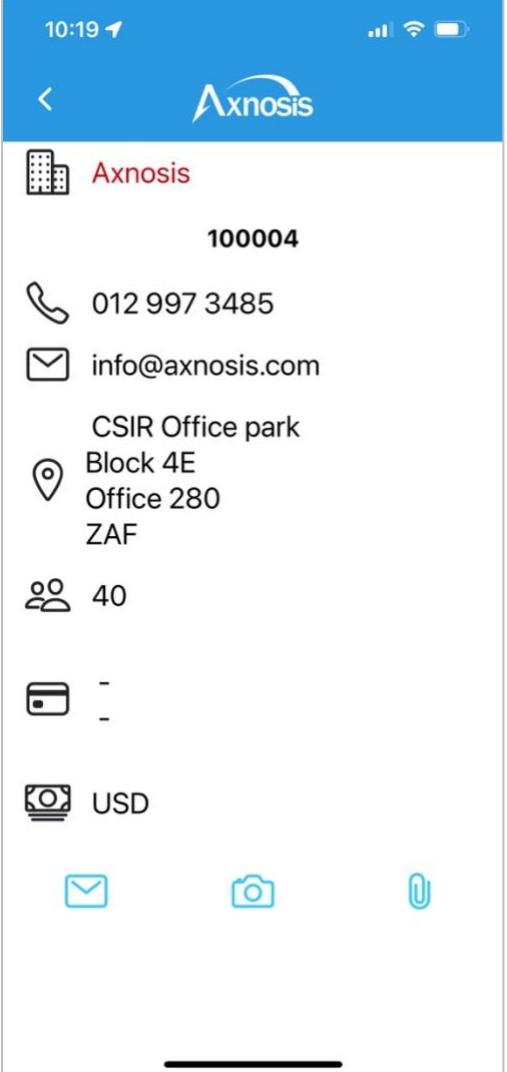
TALKING POINTS AND STEPS	MOBILE APP
<p>On the Register as a new vendor screen, enter the following details:</p> <ul style="list-style-type: none"> • Open the relevant tab for registering a Person or an Organization • Enter the Company name • Enter the Business justification • Enter your First name • Enter your Surname • Enter your Email address <p>Tap on the Register button.</p> <p>On completion a new record will be created in the “Prospective vendor registration request” table/form.</p> <div> <div> Vendors <div> All vendors Vendors on hold Vendors past due Vendors who are diverse Vendor search Vendor inactivation </div> <div> > Vendor/item relations </div> <div> Vendor collaboration requests <div> Vendor requests Prospective vendor registration requests ★ Vendor collaboration user requests Category requests </div> </div> </div> </div>	

TALKING POINTS AND STEPS	MOBILE APP
<p>The Dashboard screen opens.</p> <p>The Company name (e.g., Axnosis) is displayed in blue at the top of the screen.</p> <p>In the centre of the screen the following bubbles are displayed:</p> <ul style="list-style-type: none"> ▪ Invoices: The full list of invoices that have been receipted by the Customer ▪ Purchase orders: The full list of Purchase Orders issued to the Vendor ▪ Contracts: A full list of the issued contracts between the Vendor and the Customer ▪ Payments: A list of all the payments recorded by the Customer ▪ Request for quotes: A list of RFQ's will be displayed <p>At the bottom of the screen:</p> <ul style="list-style-type: none"> ▪ The Home tab ▪ The RFQ's tab: All RFQ's can be viewed ▪ The Procurement tab: All Purchase Order's, Invoices and Payments can be viewed ▪ The Contracts tab: The contracts are listed here ▪ The About tab: Displays some disclaimer information for using the mobile app <p>Tap on Graph button to view the visual performance as displayed on the Home screen.</p>	

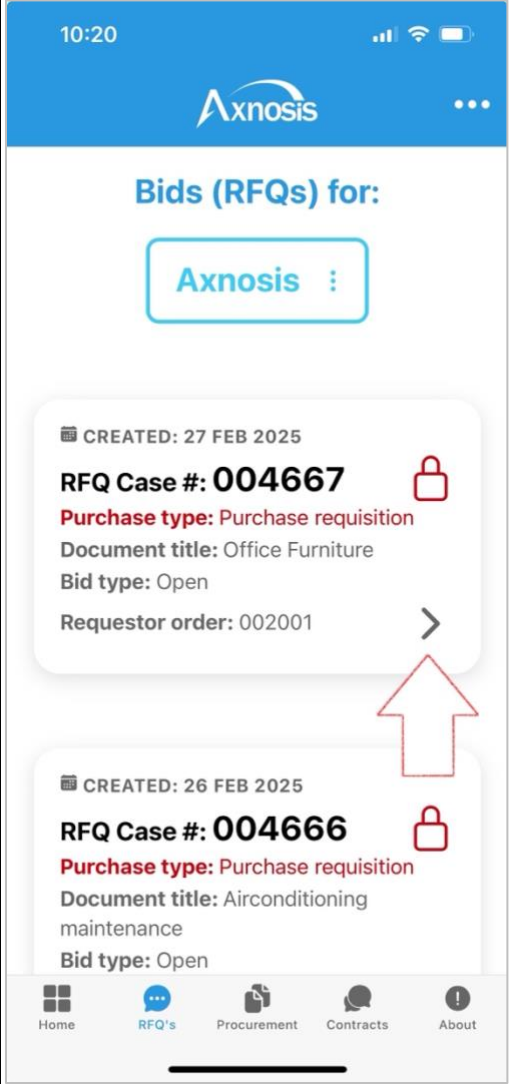
TALKING POINTS AND STEPS	MOBILE APP										
<p>To go back to the Home screen, tap on the arrow in the top left-hand side corner of the screen.</p>	 <table border="1"> <caption>Visual performance - Counts</caption> <thead> <tr> <th>Category</th> <th>Counts</th> </tr> </thead> <tbody> <tr> <td>RFQs</td> <td>0.2</td> </tr> <tr> <td>Orders</td> <td>0.8</td> </tr> <tr> <td>Invoices</td> <td>0.4</td> </tr> <tr> <td>Payments</td> <td>0.6</td> </tr> </tbody> </table>	Category	Counts	RFQs	0.2	Orders	0.8	Invoices	0.4	Payments	0.6
Category	Counts										
RFQs	0.2										
Orders	0.8										
Invoices	0.4										
Payments	0.6										

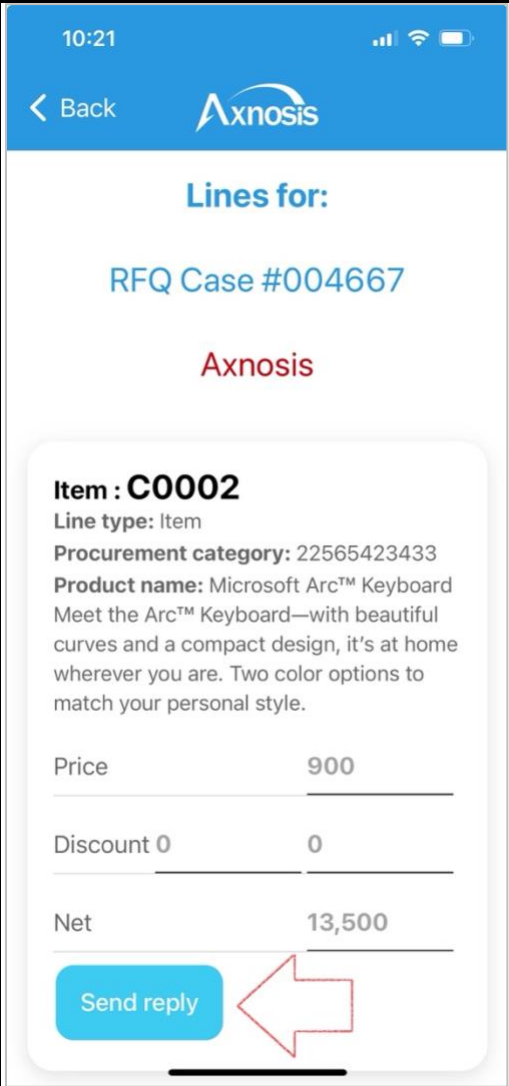
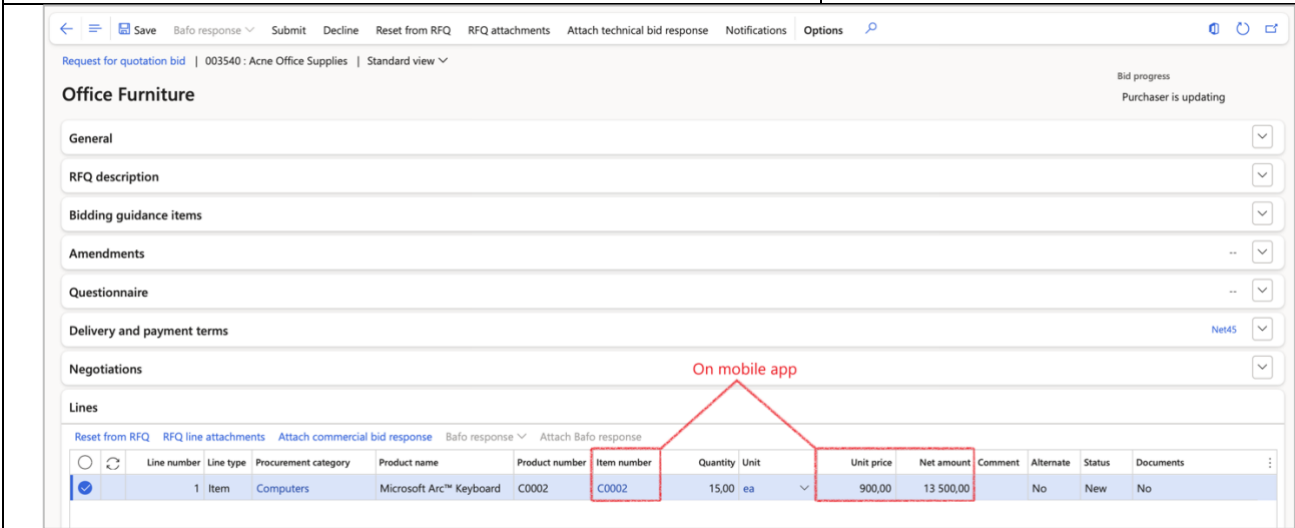
TALKING POINTS AND STEPS	MOBILE APP
Tap on the ellipsis to view the Vendor details.	

3.2 Reviewing the Vendor details via the VSS mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>The following Vendor details can be viewed:</p> <ul style="list-style-type: none"> ▪ The Vendor's system-generated ID ▪ Phone Number ▪ E-mail address ▪ Physical address ▪ Employee stats ▪ Bank account details ▪ Vendor operating currency <p>The user can also communicate with the Customer in these three ways:</p> <ul style="list-style-type: none"> • E-mail: Send an e-mail to the Customer to resolve an issue on the Vendor details list. • Upload an image: Upload an image as proof of certain details that the Customer requires from you. • Upload a file: Upload a File to the Customer's record (such as a proof of Company registration) 	

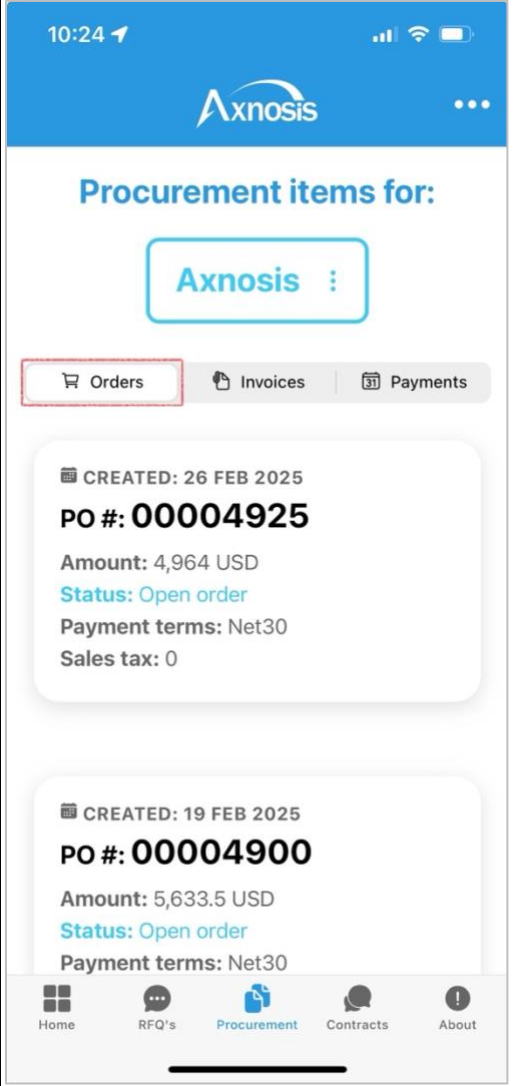
3.3 Requests for quotes

TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the Requests for quotes bubble.</p> <p>A list of all RFQs for the logged in vendor will open</p> <p>The following is displayed on the Bids (RFQs) for... screen:</p> <ul style="list-style-type: none"> • Date on which the RFQ was created • RFQ Case number • Purchase type • Document title • Bid type • Requester order number <p>Tap on the arrow to view the RFQ lines</p>	

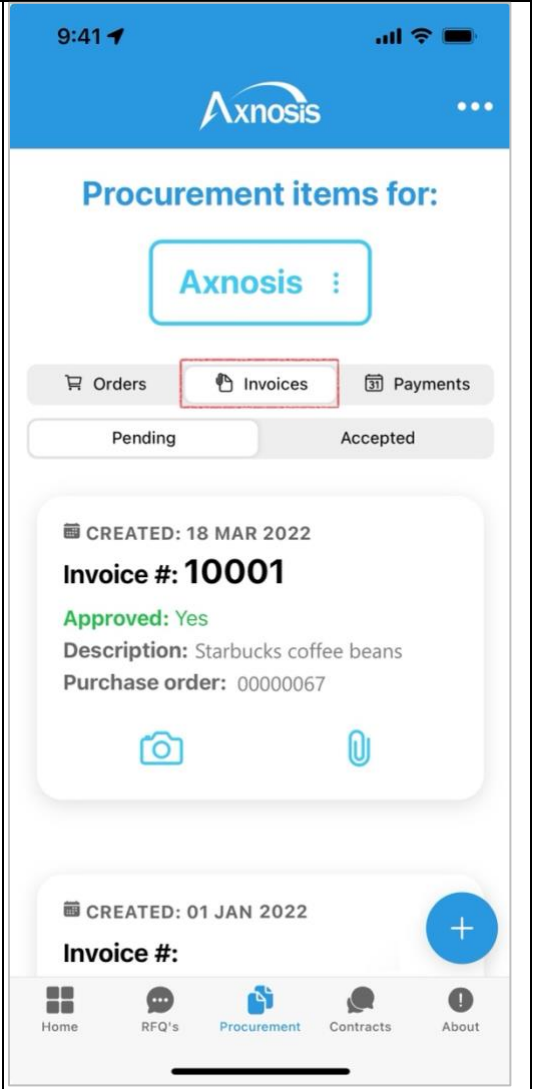
TALKING POINTS AND STEPS	MOBILE APP
<p>The vendor can enter the following on the Lines for: RFQ Case #... screen:</p> <ul style="list-style-type: none"> Price of the item Discount % Net value <p>After entering the information, tap on the Send reply button</p>	
	

3.4 View “your” procurement bits via the VSS mobile app

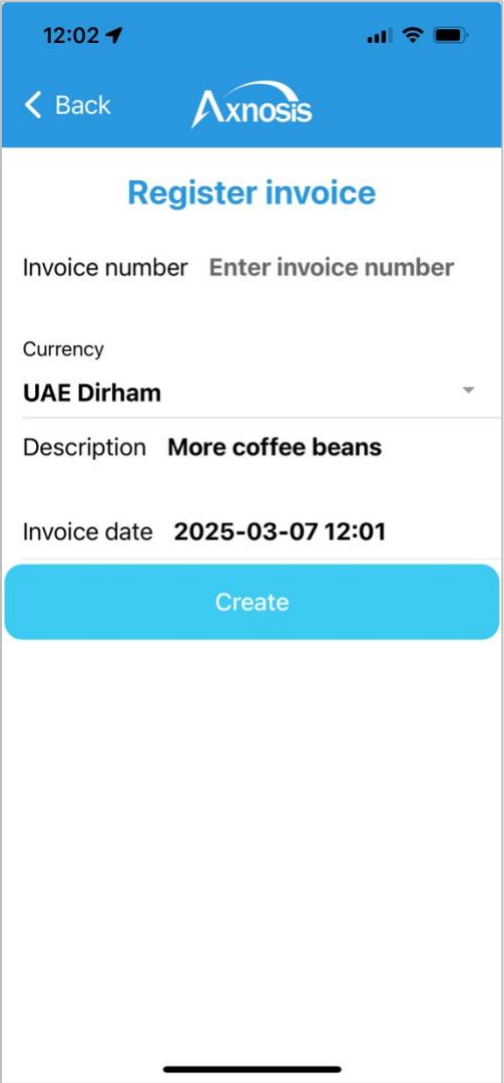
3.4.1 Purchase orders

TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the Procurement tab.</p> <p>The following tabs are on the Procurement screen:</p> <ul style="list-style-type: none"> • Orders: Lists all the Purchase Orders issued to the vendor. • Invoices: Lists all the Invoices issued by the vendor (Pending and approved) • Payments: Lists all the payments made to the vendor (In the past 12 months and older) <p>The following data is displayed for each Purchase Order (PO):</p> <ul style="list-style-type: none"> ▪ Created: The date the PO was created ▪ PO #: The PO number (system generated) ▪ Amount: The PO value and currency ▪ Status: The status of the PO ▪ Payment terms: The terms coupled to the PO ▪ Sales tax: The value of Sales Tax 	

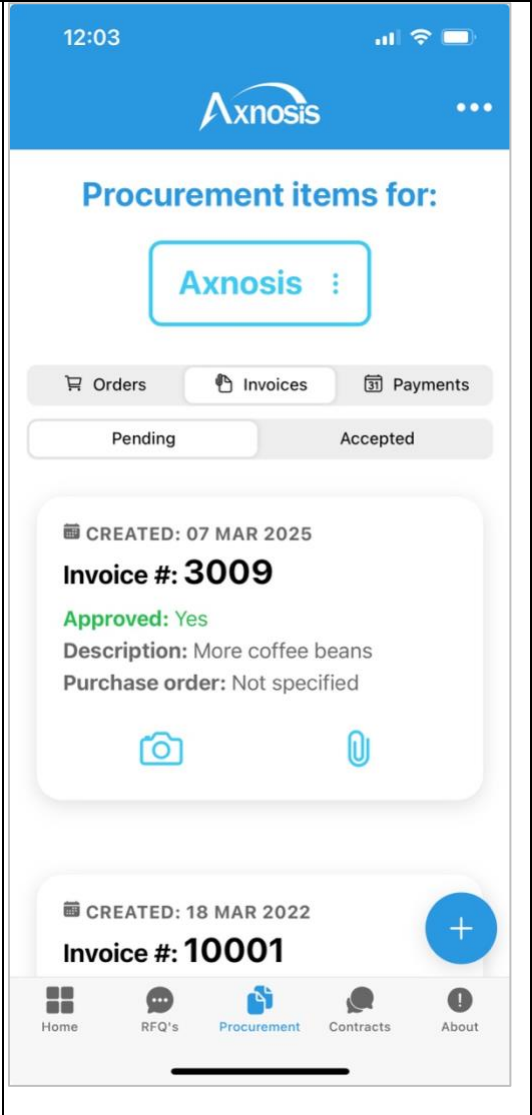
3.4.2 Invoices

TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the Invoices tab.</p> <p>Invoices already recorded by the Customer are displayed under two tabs:</p> <ul style="list-style-type: none"> ▪ Pending: All created invoices, not yet approved ▪ Accepted: All approved invoices <p>The following details are illustrated for each invoice record:</p> <ul style="list-style-type: none"> ▪ Created: Date created ▪ Invoice Number: The Vendor's invoice number ▪ Approved: Status of the invoice approval process ▪ Description: Additional invoice information ▪ Purchase Order: The purchase order the invoice is linked to. <p>The Vendor also has the option to upload additional files or images to a recorded invoice transaction.</p> <p>If the vendor notices one of the invoices not yet displayed on the list of recorded invoices, the vendor can register an invoice by tapping on the Create (+) button.</p>	

3.4.2.1 Create a new invoice in D365 via the VSS mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>To create a new record, fill in the following information:</p> <ul style="list-style-type: none"> Invoice Number: The vendor's invoice number Currency: The currency the invoice is issued in Description: A brief description of the invoice details Invoice date <p>Tap on the Create button.</p>	

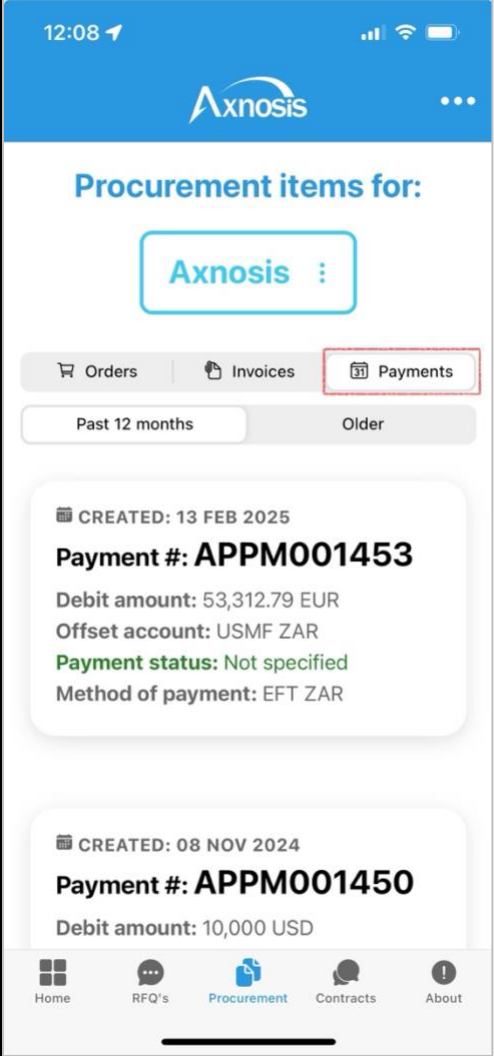
3.4.2.2 View the new invoice in D365 via the VSS mobile app

TALKING POINTS AND STEPS	MOBILE APP
<p>The new registered invoice record will now be displayed under the Invoices tab, under Pending tab.</p>	

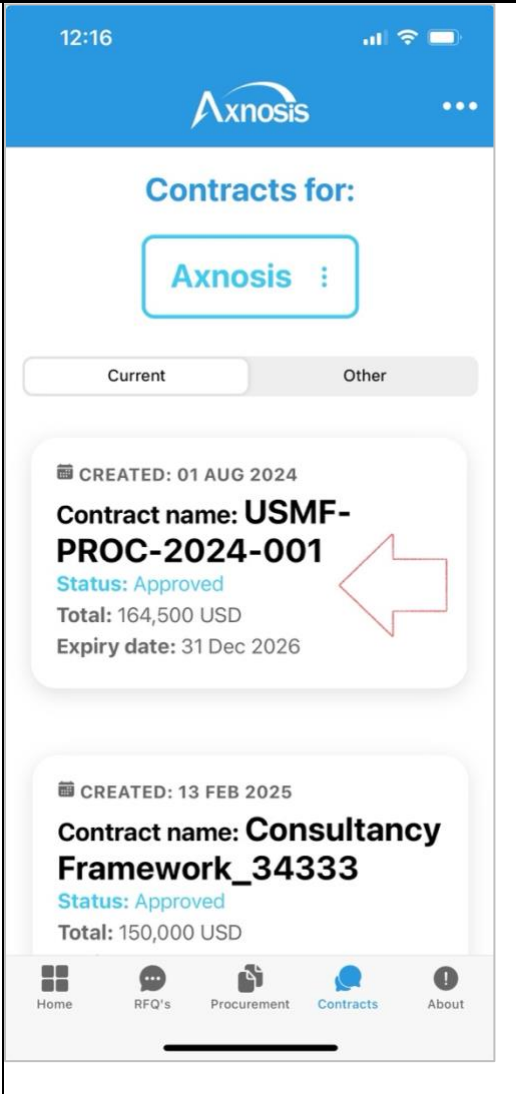
3.4.2.3 View the newly created invoice in D365

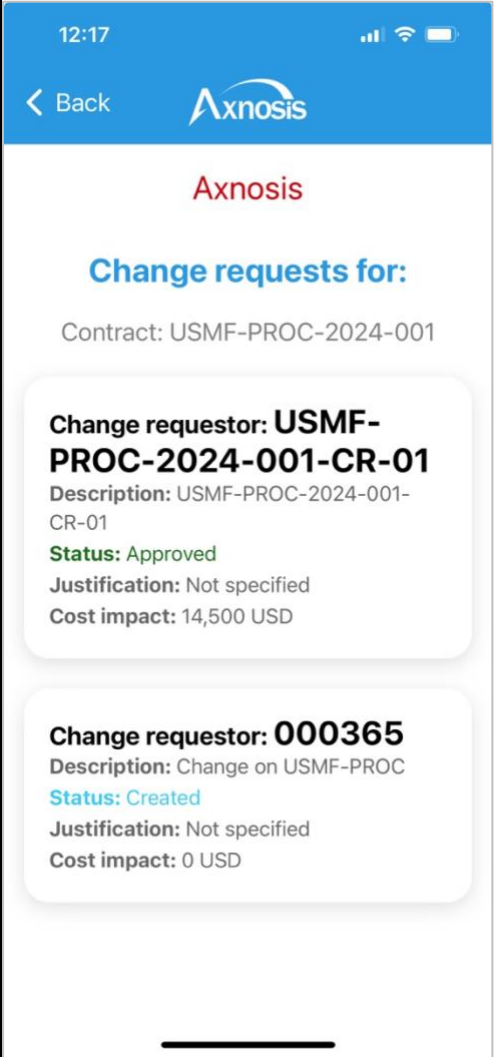
TALKING POINTS AND STEPS	DYNAMICS 365																																																																																																			
<p>The record can be viewed by the following the below path in Dynamics 365:</p> <p>Purchase ledger >Invoices > Pending vendor invoices</p> <p>To edit the invoice information, click on the invoice record. Once all information is filled in as per the invoice detail, Post the invoice.</p>	<div><div><div><div><div><div></div><div>+ New</div><div>Delete</div><div>Edit</div><div>Totals</div><div>Post</div><div>Vendor invoice</div><div>Financials</div><div>Review</div><div>Process</div><div>Options</div></div><div></div><div></div><div></div><div></div><div></div></div><div>Pending vendor invoices</div><div>Standard view * <div></div></div><div><div>Filter</div><div>usmf</div></div><table><thead><tr><th></th><th>Invoice</th><th>Company</th><th>Invoice account</th><th>Name</th><th>Purchase order</th><th>Invoice received date</th><th>Invoice date</th><th>Imported invoi...</th><th>Last match status</th><th>Product receipt</th></tr></thead><tbody><tr><td></td><td></td><td>usmf</td><td>100004</td><td>Axnosis 123</td><td>00001775</td><td>2022/12/09</td><td></td><td>0,00</td><td>Not performed</td><td>00001775</td></tr><tr><td></td><td></td><td>usmf</td><td>100004</td><td>Axnosis 123</td><td></td><td>2023/01/26</td><td></td><td>0,00</td><td>Passed</td><td></td></tr><tr><td></td><td></td><td>usmf</td><td>100004</td><td>Axnosis</td><td></td><td>2024/05/27</td><td></td><td>0,00</td><td>Passed</td><td></td></tr><tr><td></td><td>10001</td><td>usmf</td><td>100004</td><td>Axnosis</td><td></td><td>2022/03/18</td><td>2022/03/18</td><td>0,00</td><td>Passed</td><td></td></tr><tr><td></td><td>1234</td><td>usmf</td><td>100004</td><td>Axnosis</td><td>00003975</td><td>2024/08/02</td><td></td><td>0,00</td><td>Passed</td><td>1234567890</td></tr><tr><td></td><td>3009</td><td>usmf</td><td>100004</td><td>Axnosis</td><td></td><td>2025/03/07</td><td>2025/03/07</td><td>0,00</td><td>Not performed</td><td></td></tr><tr><td></td><td>AA</td><td>usmf</td><td>100004</td><td>Axnosis</td><td></td><td>2024/11/04</td><td></td><td>0,00</td><td>Passed</td><td></td></tr><tr><td></td><td>INV0006</td><td>usmf</td><td>100004</td><td>Axnosis</td><td>00004100</td><td>2025/01/21</td><td></td><td>0,00</td><td>Passed</td><td></td></tr></tbody></table></div></div></div>		Invoice	Company	Invoice account	Name	Purchase order	Invoice received date	Invoice date	Imported invoi...	Last match status	Product receipt			usmf	100004	Axnosis 123	00001775	2022/12/09		0,00	Not performed	00001775			usmf	100004	Axnosis 123		2023/01/26		0,00	Passed				usmf	100004	Axnosis		2024/05/27		0,00	Passed			10001	usmf	100004	Axnosis		2022/03/18	2022/03/18	0,00	Passed			1234	usmf	100004	Axnosis	00003975	2024/08/02		0,00	Passed	1234567890		3009	usmf	100004	Axnosis		2025/03/07	2025/03/07	0,00	Not performed			AA	usmf	100004	Axnosis		2024/11/04		0,00	Passed			INV0006	usmf	100004	Axnosis	00004100	2025/01/21		0,00	Passed	
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3.4.3 Payments

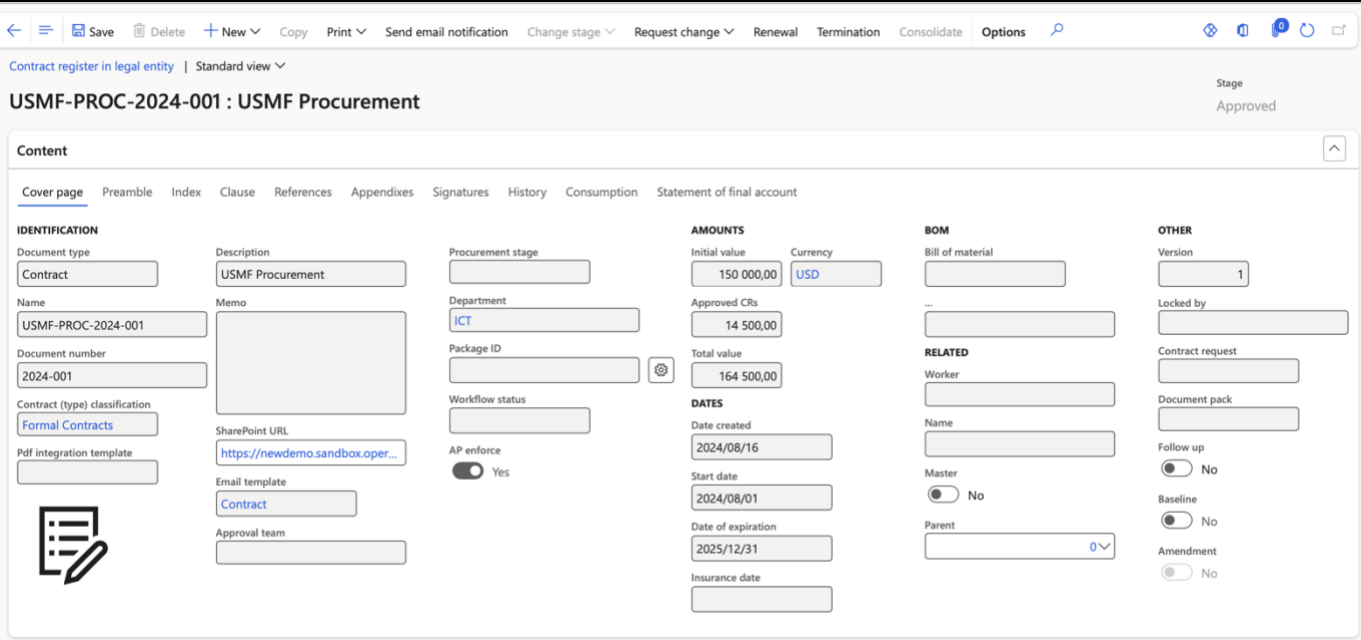
TALKING POINTS AND STEPS	MOBILE APP
<p>All payments recorded by the Customer are listed under these two tabs:</p> <ul style="list-style-type: none">• Past 12 months: Payments made within the past 12 months old.• Older: All Historical payments made over a year ago from the current date.	

3.5 View “your” contracts on the VSS mobile app

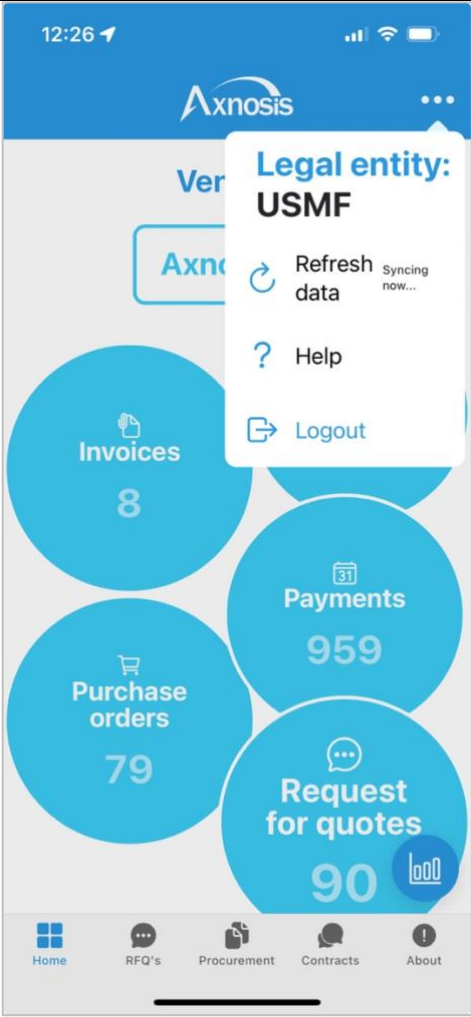
TALKING POINTS AND STEPS	MOBILE APP
<p>Tap on the Contracts tab to view the contracts that have been recorded in the system between the Customer and the Vendor.</p> <ul style="list-style-type: none"> • Current: All active contracts • Other: Older and inactive contracts <p>The following details are visible 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 any change requests logged against the contract, tap on the contract.</p>	

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: Reason for the change▪ Description: A brief description detailing the reason for the change request▪ Status: The status of the change request▪ Justification: Additional reasons for the change in the contract▪ Cost impact: The change in the contract value	 <p>The screenshot shows the Axnosis mobile app interface. At the top, there's a blue header with the time 12:17, signal strength, Wi-Fi, and battery icons. Below the header is a blue bar with a back arrow and the Axnosis logo. The main content area has a white background with the Axnosis logo in red. Below the logo, it says 'Change requests for:' in blue, followed by 'Contract: USMF-PROC-2024-001' in grey. There are two white cards with rounded corners. The first card shows 'Change requestor: USMF-PROC-2024-001-CR-01', 'Description: USMF-PROC-2024-001-CR-01', 'Status: Approved' (in green), 'Justification: Not specified', and 'Cost impact: 14,500 USD'. The second card shows 'Change requestor: 000365', 'Description: Change on USMF-PROC', 'Status: Created' (in blue), 'Justification: Not specified', and 'Cost impact: 0 USD'. At the bottom of the screen, there's a black horizontal line representing the home indicator.</p>

3.5.1 View the contract in D365

TALKING POINTS AND STEPS	DYNAMICS 365
<p>The record can be viewed by the following the below path in Dynamics 365:</p> <p>GRC > Governance > Contracts > All contracts in legal entity</p> <p>To edit the invoice information, click on the invoice record. Once all information is filled in as per the invoice detail, Post the invoice.</p>	 <p>Contract register in legal entity Standard view</p> <p>USMF-PROC-2024-001 : USMF Procurement</p> <p>Stage: Approved</p> <p>Content</p> <p>Cover page Preamble Index Clause References Appendixes Signatures History Consumption Statement of final account</p> <p>IDENTIFICATION</p> <p>Document type: Contract</p> <p>Description: USMF Procurement</p> <p>Name: USMF-PROC-2024-001</p> <p>Document number: 2024-001</p> <p>Contract (type) classification: Formal Contracts</p> <p>PDF integration template</p> <p>SharePoint URL: https://newdemo.sandbox.oper...</p> <p>Email template: Contract</p> <p>Approval team</p> <p>AMOUNTS</p> <p>Initial value: 150 000,00</p> <p>Currency: USD</p> <p>Approved CRs: 14 500,00</p> <p>Total value: 164 500,00</p> <p>DATES</p> <p>Date created: 2024/08/16</p> <p>Start date: 2024/08/01</p> <p>Date of expiration: 2025/12/31</p> <p>Insurance date</p> <p>BOM</p> <p>Bill of material</p> <p>OTHER</p> <p>Version: 1</p> <p>Locked by</p> <p>Contract request</p> <p>Document pack</p> <p>Follow up: No</p> <p>Baseline: No</p> <p>Amendment: No</p>

3.6 Viewing the 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 Axnosis mobile app interface. At the top, the status bar displays the time 12:26 and signal indicators. The app header is blue with the Axnosis logo and a three-dot ellipsis menu icon. A white dropdown menu is open, showing the following options: 'Legal entity: USMF', 'Refresh data' (with a circular arrow icon and 'Syncing now...' text), 'Help' (with a question mark icon), and 'Logout' (with a door icon). The main screen features four large blue circular buttons: 'Invoices 8', 'Payments 959', 'Purchase orders 79', and 'Request for quotes 90'. At the bottom, there is a navigation bar with five icons: Home, RFQ's, Procurement, Contracts, and About.</p>