Demo script

Vendor Self-service (VSS) Mobile App

Microsoft Dynamics 365 FO

Document Date:
2025-03-07

Document Status
Draft

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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

Table of Contents

1. Technology

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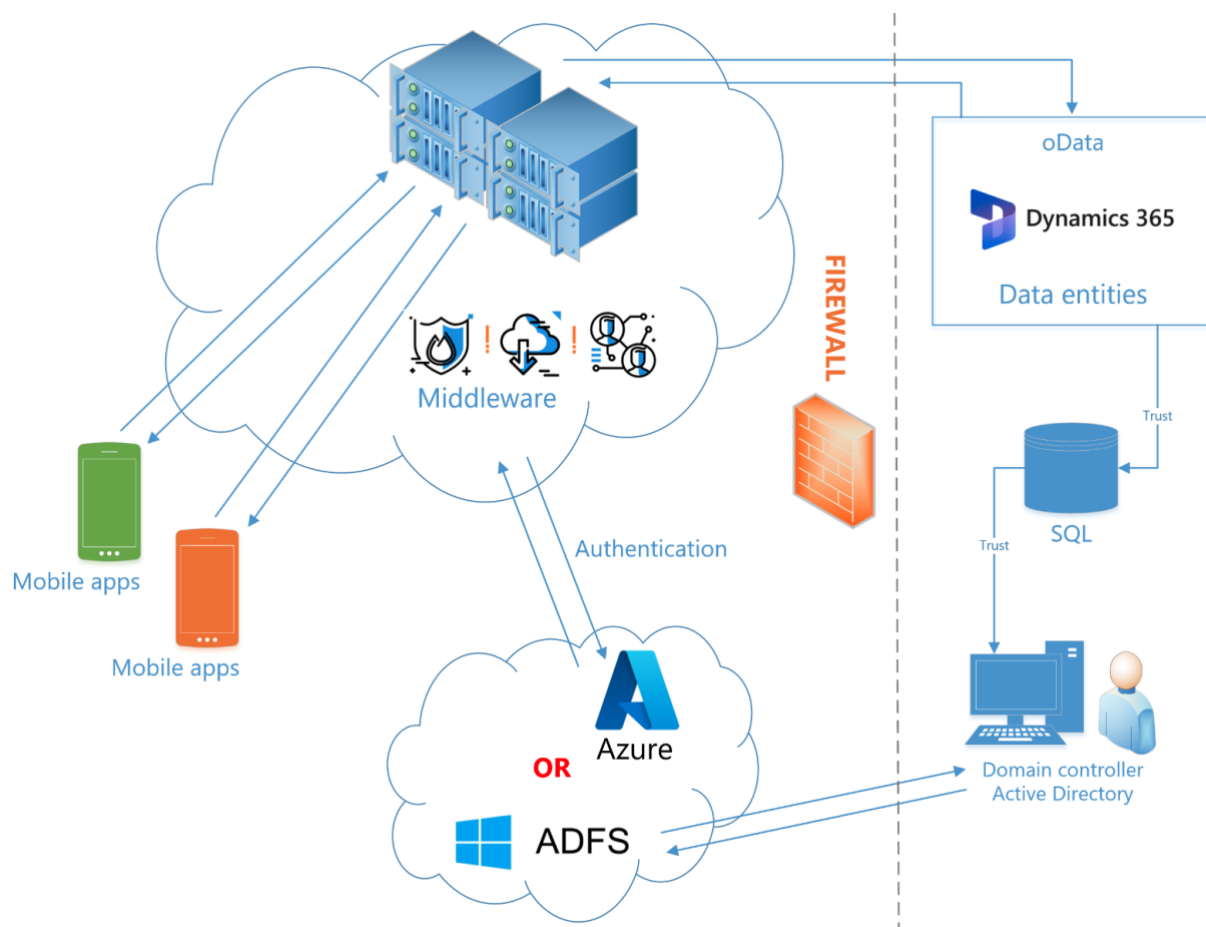
2. Demo setup

- 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

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

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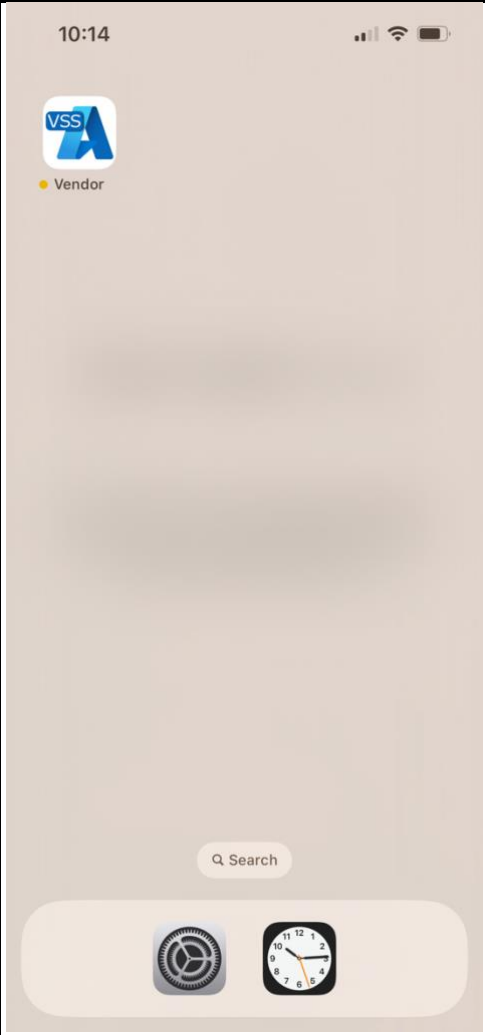
- It is assumed that the D365 GRC module is installed on D365.
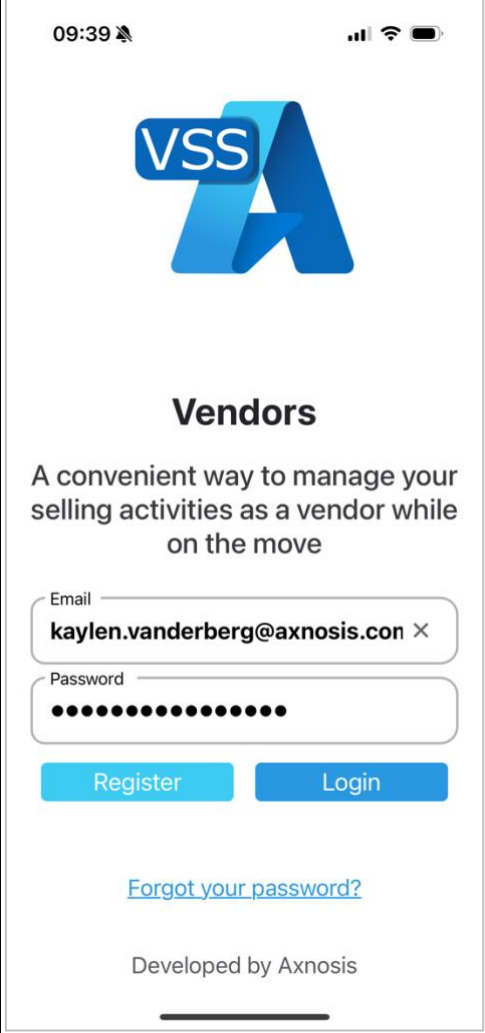
2.3 Scenario

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

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

Microsoft

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.

Microsoft

← 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.
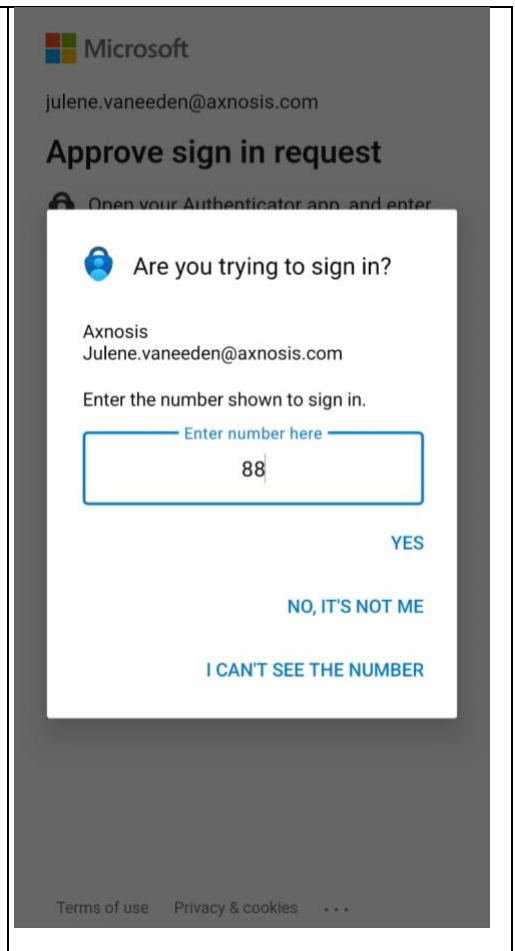
A notification may appear requiring the authentication number to be entered or the user may opt to access the authenticator app manually to complete the authentication process.
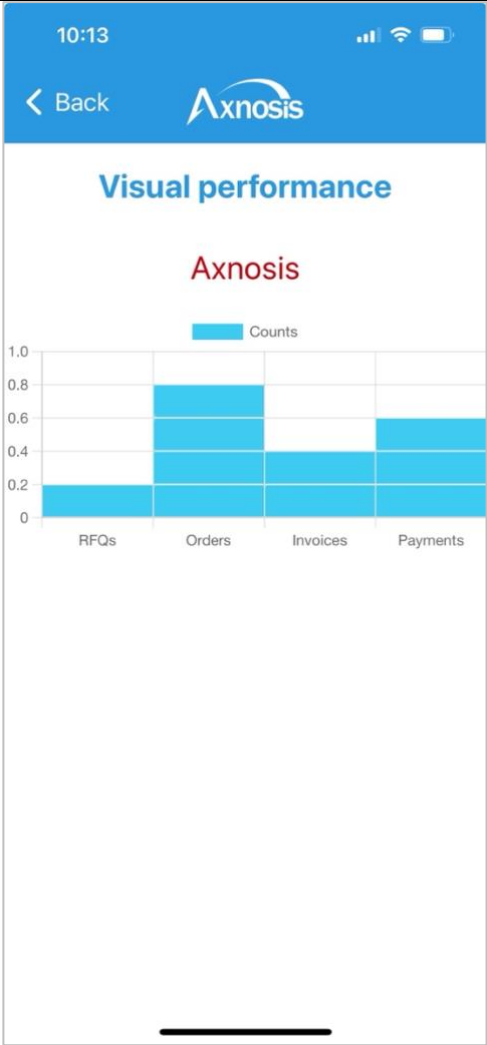
Enter the **authentication number** previously provided to approve the sign in then click on the **Yes** button to continue.
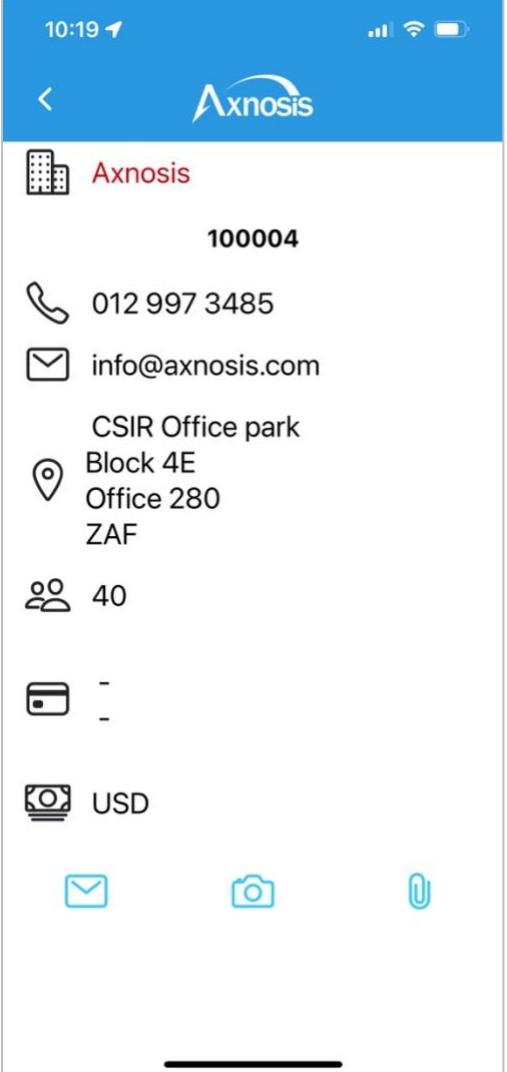
TALKING POINTS AND STEPS	MOBILE APP

On the **Register as a new vendor** 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**
 	
Tap on the **Register** button.
 	
On completion a new record will be created in the "Prospective vendor registration request" table/form.
 	
⌄ **Vendors**
 	
   All vendors
 	
   Vendors on hold
 	
   Vendors past due
 	
   Vendors who are diverse
 	
   Vendor search
 	
   Vendor inactivation
 	
   › Vendor/item relations
 	
   ⌄ Vendor collaboration requests
 	
      Vendor requests
 	
      Prospective vendor registration requests ★
 	
      Vendor collaboration user requests
 	
      Category requests
	09:39
	‹ Back Axnosis
	
	Register as a new vendor
	
	Organization type
	
	[Person] [Organization]
	
	Company name
	Stand-up Coffee ✕
	
	Business justification
	coffee ✕
	
	First name
	Kaylen ✕
	
	Surname
	van der Berg ✕
	
	Email
	kaylen.vanderberg@axnosis.con ✕
	
	Request for quote 004235, ... ▾
	
	[Register]

TALKING POINTS AND STEPS	MOBILE APP
The **Dashboard** screen opens. The **Company name** (e.g., Axnosis) is displayed in blue at the top of the screen. In the centre of the screen the following bubbles are displayed: **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 At the bottom of the screen: - 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 Tap on **Graph** button to view the **visual performance** as displayed on the Home screen.	
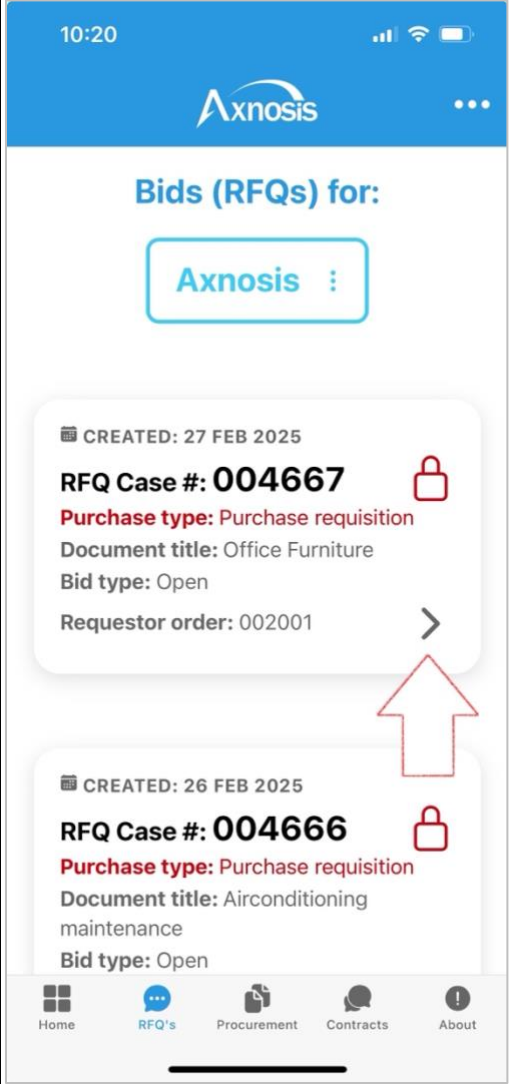
TALKING POINTS AND STEPS	MOBILE APP
To go back to the **Home** screen, tap on the arrow in the top left-hand side corner of the screen.	
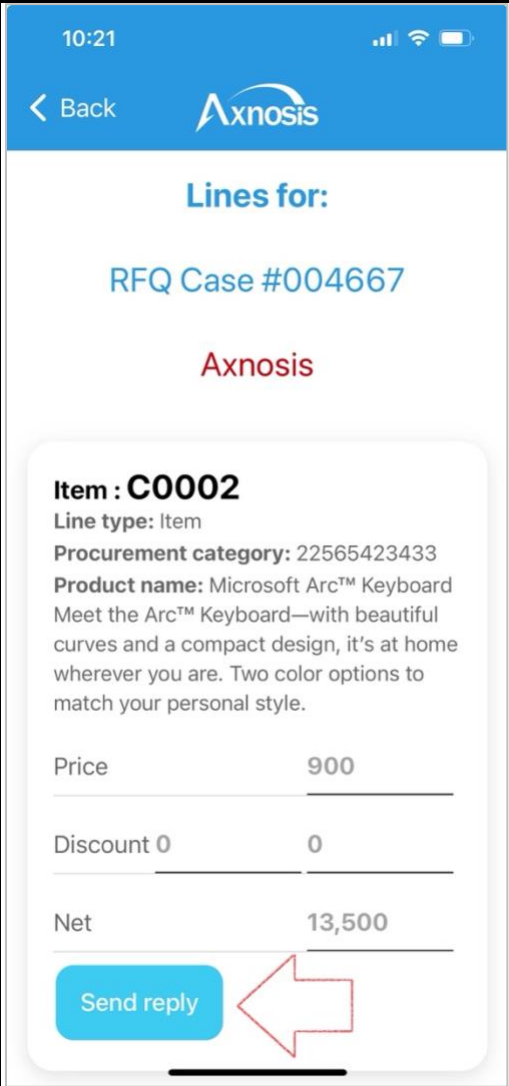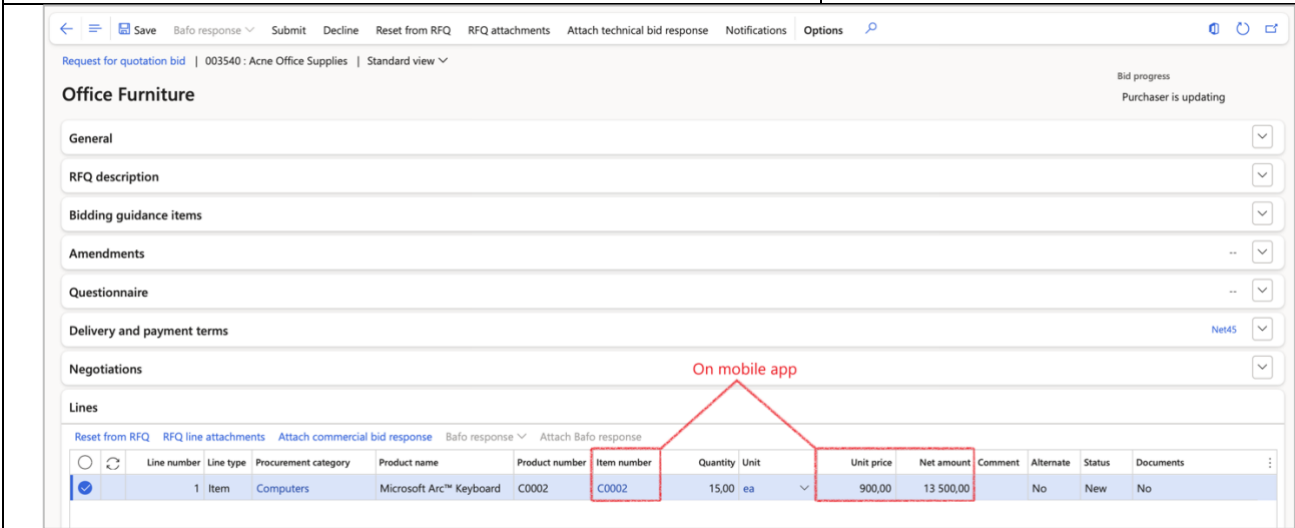
TALKING POINTS AND STEPS	MOBILE APP
Tap on the ellipsis to view the **Vendor** details.	

3.2 Reviewing the Vendor details via the VSS mobile app

TALKING POINTS AND STEPS	MOBILE APP

The following **Vendor details** can be viewed:
 	
  ▪ The Vendor's system-generated ID
  ▪ Phone Number
  ▪ E-mail address
  ▪ Physical address
  ▪ Employee stats
  ▪ Bank account details
  ▪ Vendor operating currency
 	
The user can also communicate with the Customer in these three ways:
 	
  • **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)	
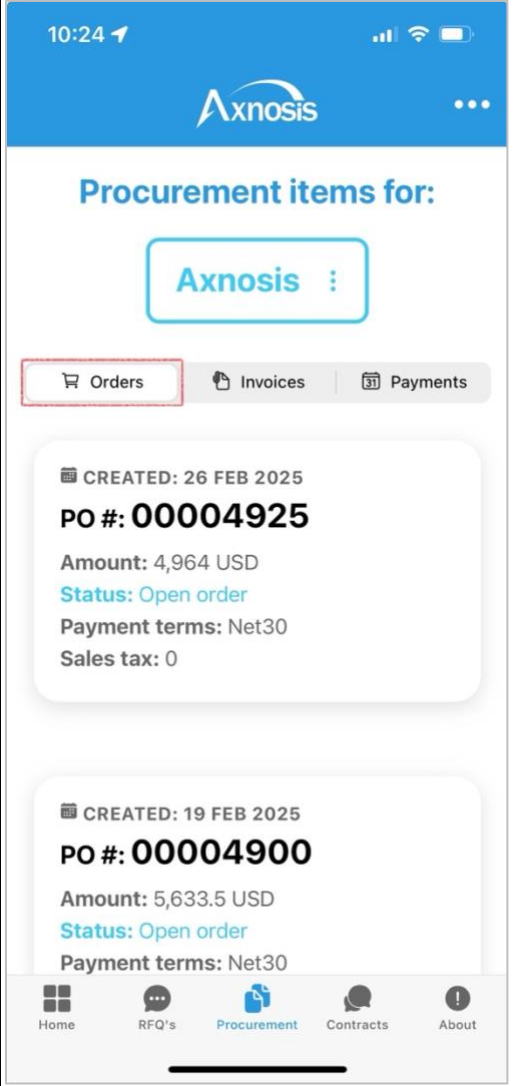
3.3 Requests for quotes

TALKING POINTS AND STEPS	MOBILE APP
Tap on the **Requests for quotes** bubble. A list of all RFQs for the logged in vendor will open The following is displayed on the **Bids (RFQs) for...** screen: • Date on which the RFQ was created • RFQ Case number • Purchase type • Document title • Bid type • Requester order number Tap on the **arrow** to view the RFQ lines	 10:20 **Bids (RFQs) for:** Axnosis ⋮ CREATED: 27 FEB 2025 RFQ Case #: **004667** Purchase type: Purchase requisition Document title: Office Furniture Bid type: Open Requestor order: 002001 › CREATED: 26 FEB 2025 RFQ Case #: **004666** Purchase type: Purchase requisition Document title: Airconditioning maintenance Bid type: Open Home RFQ's Procurement Contracts About
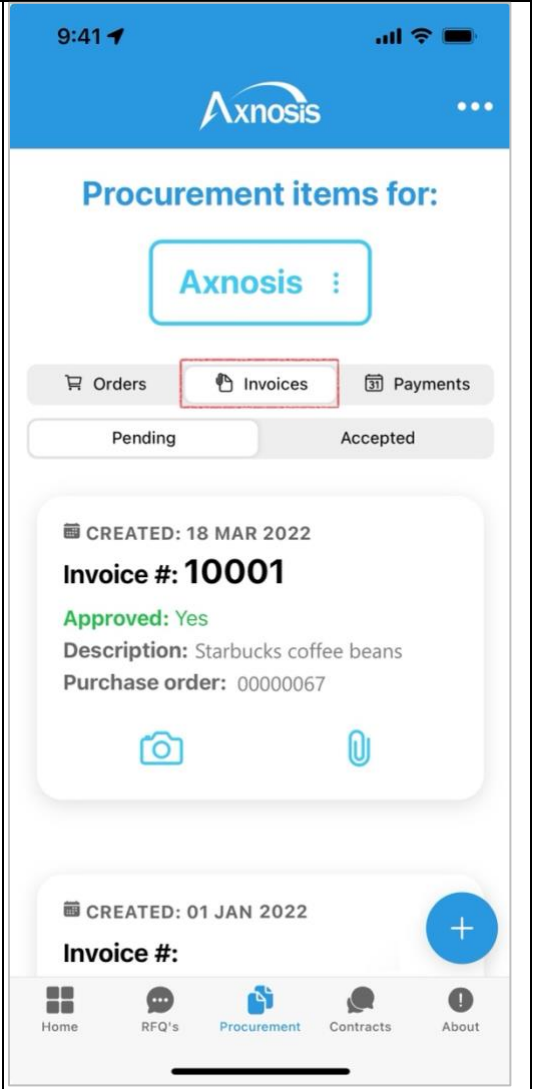
TALKING POINTS AND STEPS	MOBILE APP
The vendor can enter the following on the **Lines for: RFQ Case #...** screen: • Price of the item • Discount % • Net value After entering the information, tap on the **Send reply** button	

3.4 View "your" procurement bits via the VSS mobile app
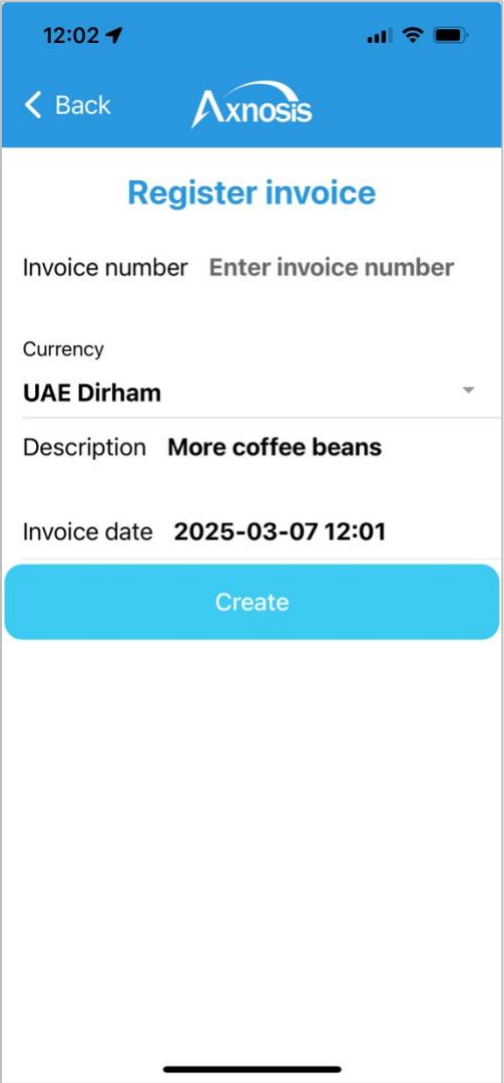
3.4.1 Purchase orders

TALKING POINTS AND STEPS	MOBILE APP
Tap on the **Procurement** tab. The following tabs are on the **Procurement** screen: • **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) The following data is displayed for each **Purchase Order** (PO): ▪ 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	
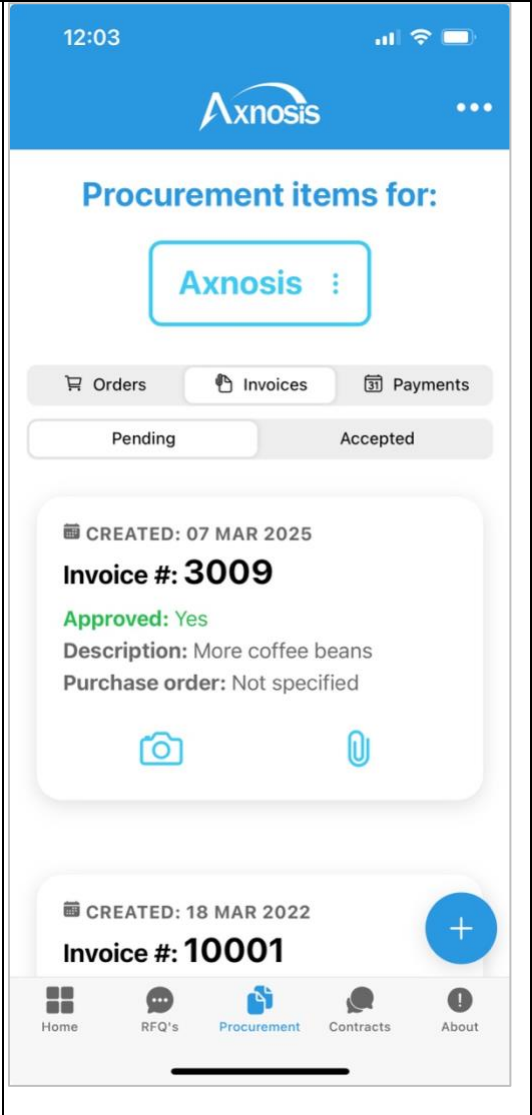
3.4.2 Invoices

TALKING POINTS AND STEPS	MOBILE APP
Tap on the **Invoices** tab. Invoices already recorded by the Customer are displayed under two tabs: ▪ **Pending:** All created invoices, not yet approved ▪ **Accepted:** All approved invoices The following details are illustrated for each invoice record: ▪ 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. The Vendor also has the option to upload additional **files** or **images** to a recorded invoice transaction. 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.	

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

TALKING POINTS AND STEPS	MOBILE APP
To create a new record, fill in the following information: • **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** Tap on the **Create** button.	
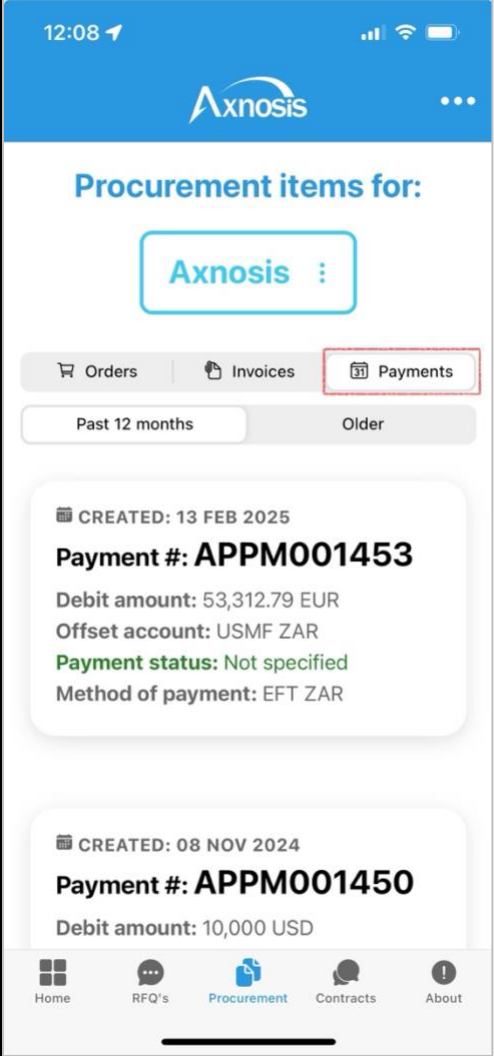
3.4.2.2 View the new invoice in D365 via the VSS mobile app

TALKING POINTS AND STEPS	MOBILE APP
The new registered invoice record will now be displayed under the **Invoices** tab, under **Pending** tab.	
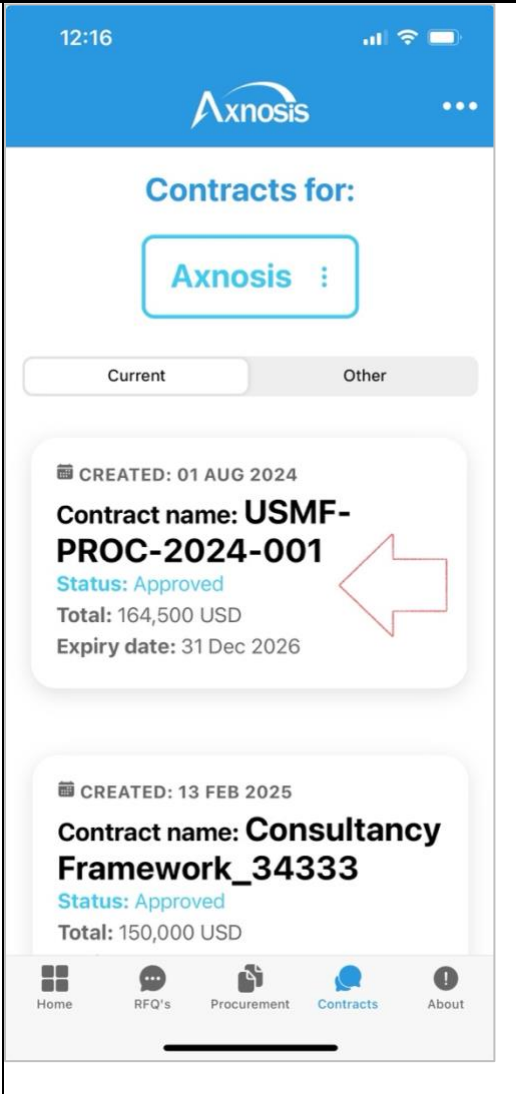
3.4.2.3 View the newly created invoice in D365
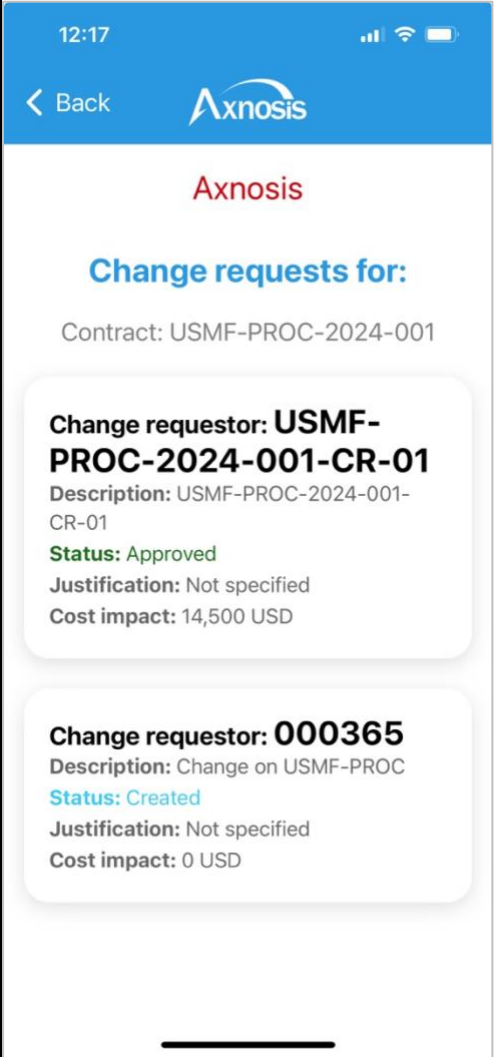
TALKING POINTS AND STEPS	DYNAMICS 365
The record can be viewed by the following the below path in Dynamics 365: **Purchase ledger >Invoices > Pending vendor invoices** To edit the invoice information, click on the invoice record. Once all information is filled in as per the invoice detail, **Post** the invoice.	

3.4.3 Payments

TALKING POINTS AND STEPS	MOBILE APP
All **payments** recorded by the Customer are listed under these two tabs: • **Past 12 months:** Payments made within the past 12 months old. • **Older:** All Historical payments made over a year ago from the current date.	

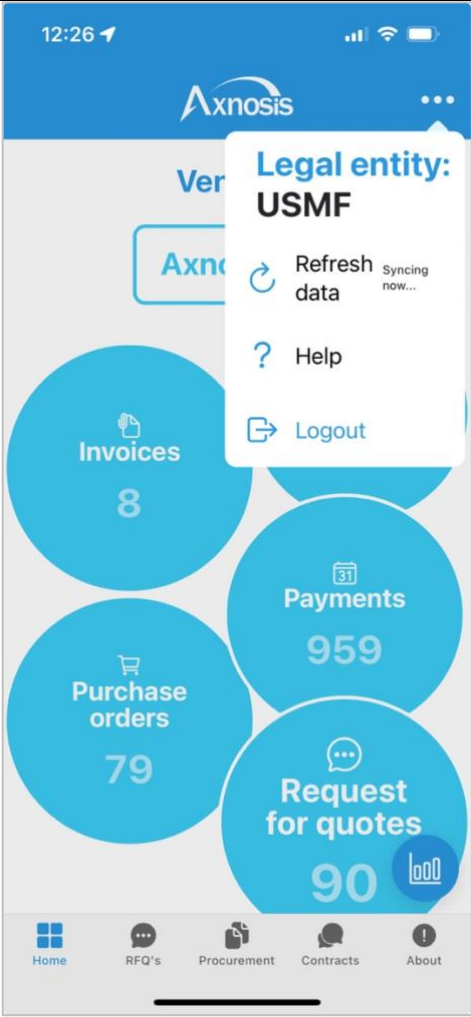## 3.5 View "your" contracts on the VSS mobile app

TALKING POINTS AND STEPS	MOBILE APP
Tap on the **Contracts** tab to view the contracts that have been recorded in the system between the Customer and the Vendor. • **Current:** All active contracts • **Other:** Older and inactive contracts 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 any change requests logged against the contract, tap on the **contract**.	

TALKING POINTS AND STEPS	MOBILE APP
The following details are displayed for each change request: ▪ **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	 12:17 ‹ Back　Axnosis Axnosis **Change requests for:** Contract: USMF-PROC-2024-001 Change requestor: **USMF-PROC-2024-001-CR-01** Description: USMF-PROC-2024-001-CR-01 **Status:** Approved **Justification:** Not specified **Cost impact:** 14,500 USD Change requestor: **000365** Description: Change on USMF-PROC **Status:** Created **Justification:** Not specified **Cost impact:** 0 USD

3.5.1 View the contract in D365

TALKING POINTS AND STEPS	DYNAMICS 365
The record can be viewed by the following the below path in Dynamics 365: **GRC > Governance > Contracts > All contracts in legal entity** To edit the invoice information, click on the invoice record. Once all information is filled in as per the invoice detail, **Post** the invoice.	

3.6 Viewing the 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**	