## End-To-End Scenarios

Solution Name: Covid Market Impact Tools

Scenario: As a salesperson, I need to track the impact of Covid across my Accounts

Prerequisites:

* Covid Market Impact Tools solution must be installed in Dynamics 365 CE
* The following Security roles must be assigned:
  + CDS Environment Access Role (Base)
  + Impact Assessment App User (+)
* Sample data must be added to the environment
* Start within the Model-driven Impact Assessment App interface

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| **Test steps to execute the scenario** | | | | |
| **Step #** | **Test step/Input** | **Expected result** | **Actual result** | **Pass/Fail** |
| 1 | Select “Accounts” under “Core” in the SiteMap | Accounts (Impact Assessment) view will appear |  |  |
| 2 | Select an Account | Account (Impact Assessment Form) will open |  |  |
| 3 | Populate required fields, and those in the Impact Assessment section of the General Tab | Controls will be accessible |  |  |
| 4 | Select Save | The record data will be updated to reflect the changes made |  |  |

Scenario: As a salesperson, I need to see Customer Number when I am on a Dealer Account

Prerequisites:

* Covid Market Impact Tools solution must be installed in Dynamics 365 CE
* The following Security roles must be assigned:
  + CDS Environment Access Role (Base)
  + Impact Assessment App User (+)
* Sample data must be added to the environment
* Start within the Model-driven Impact Assessment App interface

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| **Test steps to execute the scenario** | | | | |
| **Step #** | **Test step/Input** | **Expected result** | **Actual result** | **Pass/Fail** |
| 1 | Select “Accounts” under “Core” in the SiteMap | Accounts (Impact Assessment) view will appear |  |  |
| 2 | Select an Account | Account (Impact Assessment Form) will open |  |  |
| 3 | Set the “Account Type” value of the Account to “Dealer” | Customer Number field will appear in the “Basic Information” section below Account Type |  |  |
| 4 | Set the value of “Account Type” to another value (other than Dealer) | The Customer Number field will be hidden |  |  |

Scenario: As a salesperson, I need the Country field to default to US so I don’t need to fill it out manually every time.

Prerequisites:

* Covid Market Impact Tools solution must be installed in Dynamics 365 CE
* The following Security roles must be assigned:
  + CDS Environment Access Role (Base)
  + Impact Assessment App User (+)
* Sample data must be added to the environment
* Start within the Model-driven Impact Assessment App interface

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| **Test steps to execute the scenario** | | | | |
| **Step #** | **Test step/Input** | **Expected result** | **Actual result** | **Pass/Fail** |
| 1 | Select the Create (+) button on the Navigation Bar | Quick Create selector should open, and Accounts should be available |  |  |
| 2 | Select Account in the drop-down menu | Impact Assessment Quick View form should open |  |  |
| 3 | Scroll to the bottom of the Quick Create form | “Address 1: Country/Region” should contain the default value “United States” |  |  |

Scenario: As a salesperson, I need OOB Account fields to be locked when the “Lock CE Account Information” Boolean field is set to Yes.

Prerequisites:

* Covid Market Impact Tools solution must be installed in Dynamics 365 CE
* The following Security roles must be assigned:
  + CDS Environment Access Role (Base)
  + Impact Assessment App User (+)
* Sample data must be added to the environment
* Start within the main form of an Account record whose arb\_LockCEAccountInformationFlag value is set to True

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| **Test steps to execute the scenario** | | | | |
| **Step #** | **Test step/Input** | **Expected result** | **Actual result** | **Pass/Fail** |
| 1 | Open the main form of an Account record whose arb\_LockCeAccountInformationFlag value is set to **TRUE** | The following form fields should be locked for editing:   * Account Name * Customer Number (if visible) * Account Type * Sales Territory * Address 1:   + Street 1   + Street 2   + Street 3   + City   + State/Province   + Zip/Postal Code   + Country/Region |  |  |
| 2 | Open the main form of an Account record whose arb\_LockCeAccountInformationFlag value is set to **FALSE** | The following form fields should be editable:   * Account Name * Customer Number (if visible) * Account Type * Sales Territory * Address 1:   + Street 1   + Street 2   + Street 3   + City   + State/Province   + Zip/Postal Code   Country/Region |  |  |

Scenario: As a salesperson, I need to work off filtered lists of Accounts in my Territory and differentiated by Account Type

Prerequisites:

* Covid Market Impact Tools solution must be installed in Dynamics 365 CE
* The following Security roles must be assigned:
  + CDS Environment Access Role (Base)
  + Impact Assessment App User (+)
* Sample data must be added to the environment
* Sales Territory Data must be added and associated with the test user and one or more Accounts of each type

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| **Test steps to execute the scenario** | | | | |
| **Step #** | **Test step/Input** | **Expected result** | **Actual result** | **Pass/Fail** |
| 1 | Select “Accounts” under “Core” in the SiteMap | Accounts (Impact Assessment) view will appear |  |  |
| 2 | In the View selector drop-down, select “My Accounts (Impact Assessment)” | My Accounts (Impact Assessment) view will appear, containing Accounts of all Types related to a Sales Territory associated with the User |  |  |
| 3 | In the View selector drop-down, select “My Dealer Accounts” | My Dealer Accounts view will appear, containing Dealer Accounts of all Types related to a Sales Territory associated with the User |  |  |
| 4 | In the View selector drop-down, select “My Vendor Accounts” | My Vendor Accounts view will appear, containing Dealer Accounts of all Types related to a Sales Territory associated with the User |  |  |
| 5 | In the View selector drop-down, select “My End User Accounts” | My End User Accounts view will appear, containing Dealer Accounts of all Types related to a Sales Territory associated with the User |  |  |

Scenario: As a system administrator, I need to create Sales Territories associated with my Sales Team members and their Accounts

Prerequisites:

* Covid Market Impact Tools solution must be installed in Dynamics 365 CE
* The following Security roles must be assigned:
  + CDS Environment Access Role (Base)
  + Impact Assessment App **Admin** (+)
* Sample data must be added to the environment

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| **Test steps to execute the scenario** | | | | |
| **Step #** | **Test step/Input** | **Expected result** | **Actual result** | **Pass/Fail** |
| 1 | Select “Sales Territories” under “Reference” in the SiteMap |  |  |  |
| 2 | Select “+ New” in the Command Bar / Ribbon | Create form will open |  |  |
| 3 | Add a value for “Name” and save the record | “Related” tab will be revealed |  |  |
| 4 | Select the “Related Tab” and Users within the list | Associated view of Users will appear |  |  |
| 5 | Select “Add Existing User” above the associated view | Lookup control will pull out from the right side of the screen |  |  |
| 6 | Search for a User with “Impact Assessment App User (+)” security level and click “Add" | User will appear in the Associated View |  |  |
| 7 | Select “Accounts” under “Core” in the SiteMap | List of Accounts will appear |  |  |
| 8 | Open an Account and add the new Sales Territory in the associated Lookup field |  |  |  |