D365 Icons and Tooltips E2E user scenario

Assumptions

+ Test with clean Dynamics 365 installed and installed Sample Data
+ All test case explain detail base on the installed Sample Data

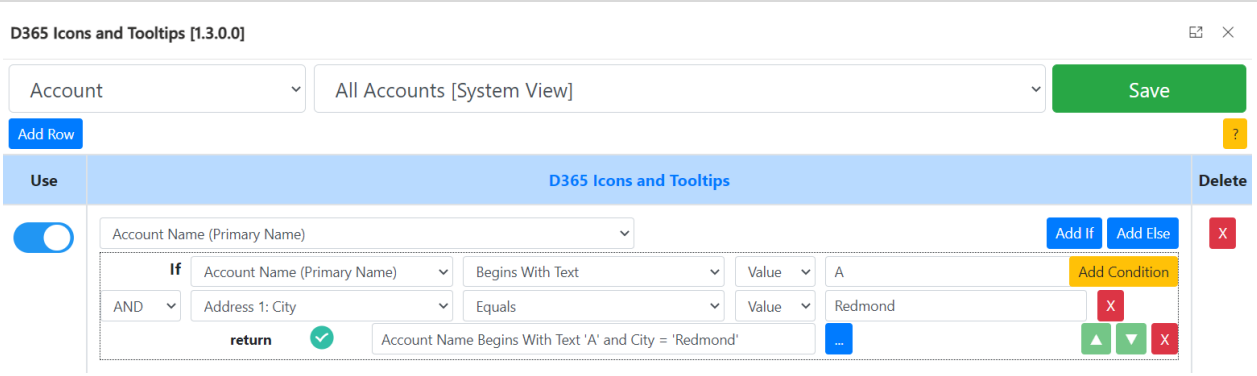
Version 1.3.0.0

Test cases

- **TEST01**: You **can not** do the test **TEST02** from version **1.2.0** because this version we removed this functionality
- **TEST02**: You **can not** do the test **TEST01** from version **1.0.0** because this version we removed this functionality
- **TEST03**: You **can not** do the test **TEST02** from version **1.0.0** because this version we removed this functionality
- **TEST04**: Test the new condition type AND/OR (tested D365 2021 wave 2)

Noted: please note if you re-test version 1.0.0, 1.1.0, 1.2.0 the UI of the window has some changes that we don't update in this document. But the functionality is the same.

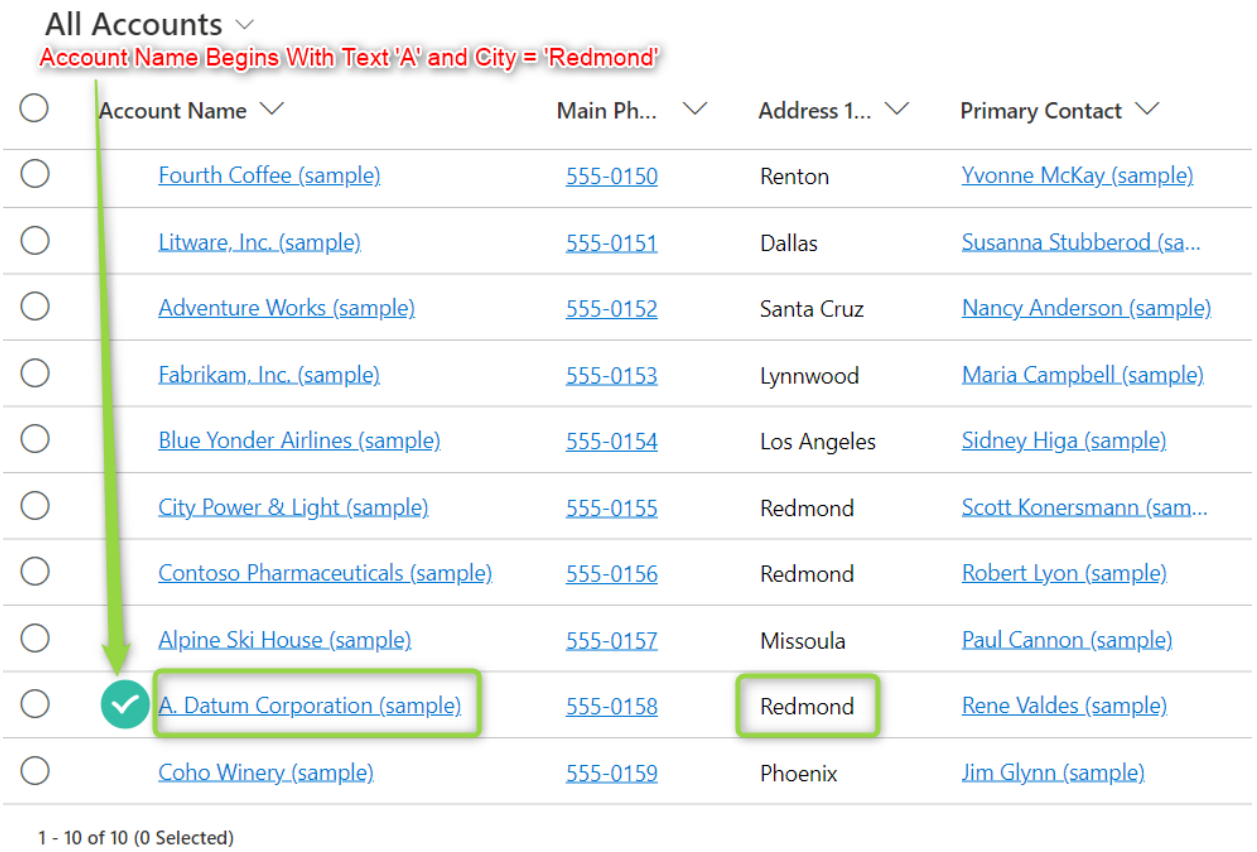
Test Number	**TEST04**
Primary Persona:	Customizer/System Administrator - Define System View with condition type AND/OR
Problem Statement:	+ You are a Customizer/System Adminstrator and + D365 Icons and Tooltips installed and + You need show Icons and Tooltips in Dynamics 365 grid.
Pain Points:	+ You need a help from developer coding to show Icons and Tooltips for each system view.
User Goals:	+ You can define Icons and Tooltips without a help from developer
Business Goals:	+ All users can see your define System View with Icons and Tooltips
Detailed Steps	+ Goto **Account** and select **All Accounts** view. + In the command bar, click **D365 ICONS** button. A dialog opened allow you define D365 Icons and Tooltips. + Define your Icons and Tooltips as picture below



+ Click **Save** button to save your result.

+ Click **X** button to close the dialog and refresh the page.

+ Now, you can see Icons and Tooltips (without a help from your developer) as picture bellow.



+ You passed this test.

Success Metrics:	+ All users can see your define System View with Icons and Tooltips

Version 1.2.0

Test cases

- **TEST01**: Verify the OOB modal window display in UCI (> v.9.1)
- ~~**TEST02**: Verify the hides columns function~~ **(Removed from version 1.3.0.0)**

Test Number	**TEST01**
Primary Persona:	Verify the OOB modal window display in UCI (> v.9.1)
Problem Statement:	+ You are a Customizer/System Adminstrator and + You successfully installed D365 Icons and Tooltips ~~and configuration~~ and + Make sure you use the UCI and version >=9.1
Pain Points:	+ Sometime the open window has been blocked by desktop browser
User Goals:	+ User always access the open window
Business Goals:	+ N/A
Detailed Steps	+ You go to the entity home page + You click to button D365 ICONS + The OOB window now open replaced by opener browser window + You passed this test.
Success Metrics:	Note: If you are in the old UI or you use UCI version <9.1, the action like version 1.1.0: it use opener browser window

~~Test Number~~	~~**TEST02**~~
~~Primary Persona:~~	~~Verify the hides columns function~~
~~Problem Statement:~~	~~+ You are a Customizer/System Adminstrator and~~ ~~+ You successfully installed D365 Icons and Tooltips and configuration~~
~~Pain Points:~~	~~+ User add columns to view to make the condition, but user don't want to see this column in view.~~
~~User Goals:~~	~~+ User can hide columns that they don't want to see in view (but use it for the condition)~~
~~Business Goals:~~	~~+ N/A~~

~~Detailed Steps~~	~~+ You go to the entity home page~~ ~~+ You click to button D365 ICONS~~ ~~+ The OOB window or opener browser window display~~ ~~+ You click tab: Hide Columns~~ ~~+ You click button: Add Column~~ ~~+ You select column in the dropdown list you want to hide~~ ~~+ You Save the data and close and refresh~~ ~~+ You check and make sure the columns you want to hide it should be hide~~ ~~+ You passed this test.~~
~~Success Metrics:~~	~~+ Columns hide~~

Version 1.1.0

Test cases

- ~~**TEST01**: D365 Icons and Tooltips not show the button in the *UCI*~~ **(This test only work with this version, higher version fixed that you cannot test)**
- **TEST02**: Force Re-Saving for all entities

~~Test Number~~	~~**TEST01**~~
~~Primary Persona:~~	~~Verify D365 ICONS button exist in the UCI app~~
~~Problem Statement:~~	~~+ You are a Customizer/System Adminstrator and~~ ~~+ You successfully installed D365 Icons and Tooltips~~
~~Pain Points:~~	~~+ All users CANNOT see the button in the UCI screen. Bug in the vesion 1.0.0~~
~~User Goals:~~	~~+ You see the button in the UCI~~
~~Business Goals:~~	~~+ N/A~~
~~Detailed Steps~~	~~+ Open an UCI app. E.g.: CRM Hub~~ ~~+ Goto Account and select All Accounts view.~~ ~~+ You will see the button D365 ICONS (if not see, click the three dot button to show the dropdown)~~ ~~+ You passed this test.~~
~~Success Metrics:~~	~~+ Bug fixed~~

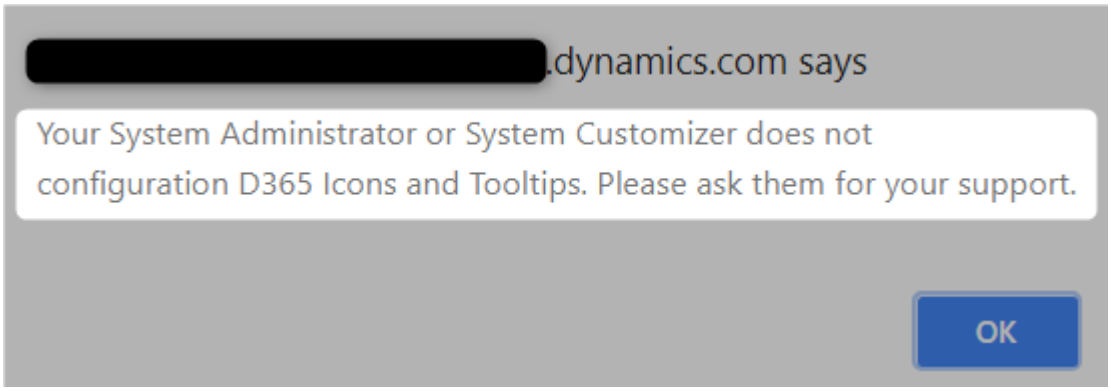
Test Number	**TEST02**
Primary Persona:	Sometime you cannot see the icons and tooltips and you sure you already configured D365 Icons and Tooltips before and it worked.
Problem Statement:	+ You are a Customizer/System Adminstrator and + You successfully installed D365 Icons and Tooltips ~~and~~ ~~+ You grant permission run with impersonating another user~~
Pain Points:	+ All users CANNOT see the icons in your views you already configured before.
User Goals:	+ N/A
Business Goals:	+ All users CAN see the icons and tooltips
Detailed Steps	+ You defined Icons and Tooltips in the All Accounts view with column Account Name. You are using D365 Icons and Tooltips in the PROD environment + You sure that after you define you will see the icons in the PROD environment. + You import a managed solution form DEV to PROD, it containts Account entity and All Accounts view, but the solution you import DON'T use D365 Icons and Tooltips (maybe this is a DEV environment) + After you success imported the solution, the configured D365 Icons and Tooltips for All Accounts view lost in the PROD. Because the Dynamics 365 overwrite the view All Accounts from DEV to PROD. + You go to All Accounts view and DIDN'T see the Icons and Tooltips you already define before. + Now, you can fix it by open solution D365 Icons and Tooltips, then you click the Configuration node, then you click the button: Force Re-Saving to resaving all entities data. + You receive an alert message that you should publish all customizations. + You go to All Accounts view, doing a web-browser force refresh (Ctrl+F5) and you see the icons and tooltips back. + You passed this test.
Success Metrics:	+ All users now CAN see the Icons and Tooltips

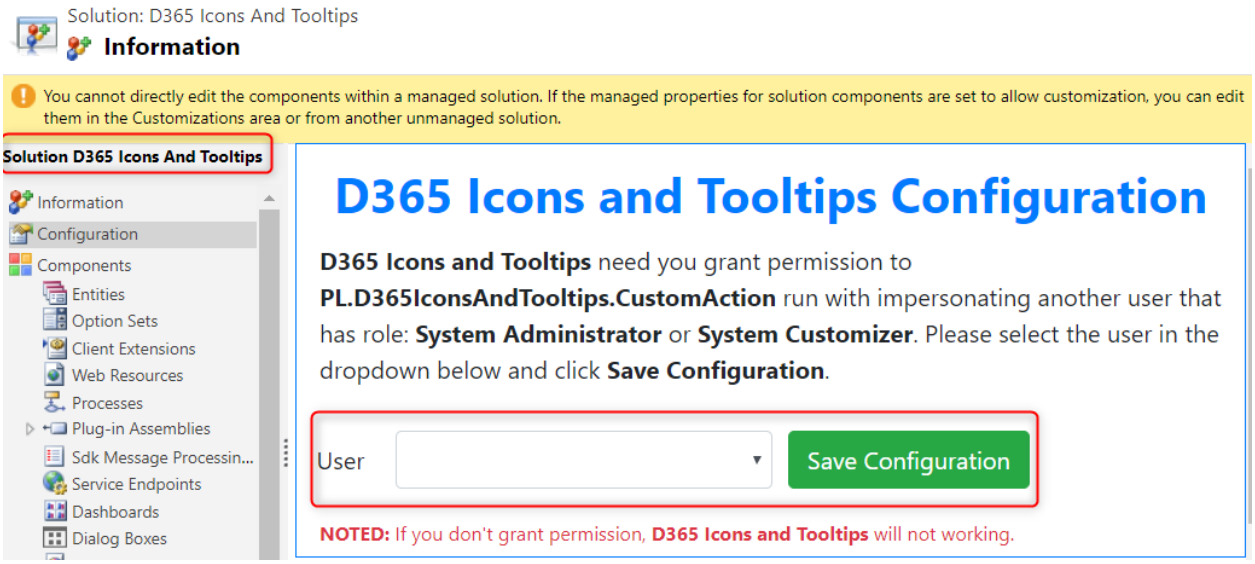
Version 1.0.0

Test cases

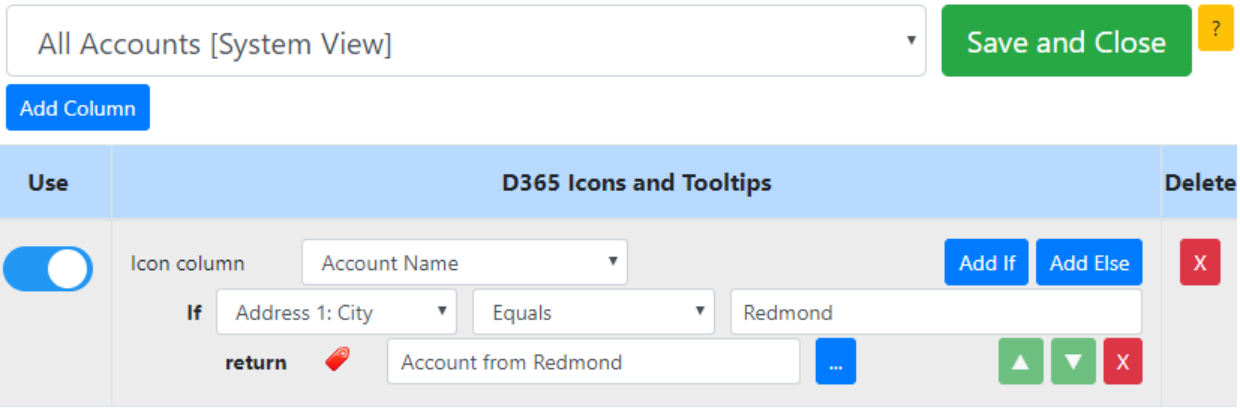
- ~~**TEST01**: Verify Customizer/System Administrator does not grant permission run with impersonating another user.~~ **(Removed from version 1.3.0.0)**
- ~~**TEST02**: Customizer/System Administrator grant permission run with impersonating another user.~~ **(Removed from version 1.3.0.0)**
- **TEST03**: Customizer/System Administrator - Define System View.
- **TEST04**: Customizer/System Administrator - Define System View for Sub-Grid
- **TEST05**: Customizer/System Administrator - Define System View for Associated Grid
- **TEST06**: Customizer/System Administrator - Define System View with Parameter.
- **TEST07**: Salesperson - Define Personal View.
- **TEST08**: Salesperson – Verify cannot Define System View.
- **TEST09**: Customizer/System Administrator/Salesperson verify Icons and Tooltips show in Advanced Find.
- **TEST10**: Customizer/System Administrator/Salesperson verify Icons and Tooltips show in Unified Client Interface.
- **TEST11**: Customizer/System Administrator/Salesperson verify Icons and Tooltips show in Dynamics 365 App for Outlook.
- **TEST12**: Customizer/System Administrator/Salesperson verify Icons and Tooltips show in Unified Service Desk.

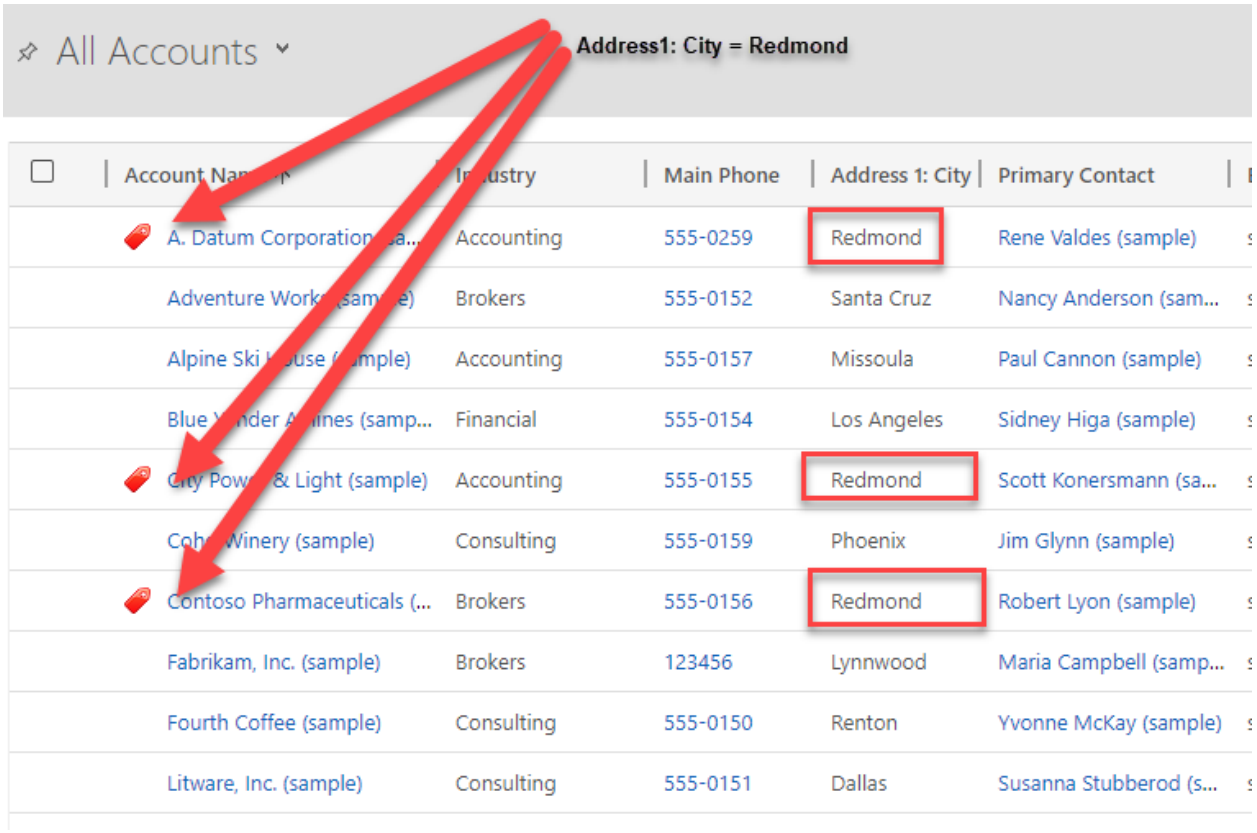
~~Test Number~~	~~**TEST01**~~
~~Primary Persona:~~	~~Verify Customizer/System Administrator does not grant permission run with impersonating another user~~
~~Problem Statement:~~	~~+ You are a Customizer/System Adminstrator and~~ ~~+ You successfully installed D365 Icons and Tooltips and~~ ~~+ You DON'T grant permission run with impersonating another user~~
~~Pain Points:~~	~~+ All users CANNOT access D365 Icons and Tooltips~~
~~User Goals:~~	~~+ You understand should grant permission run with impersonating another user~~
~~Business Goals:~~	~~+ N/A~~
~~Detailed Steps~~	~~+ Goto **Account** and select **All Accounts** view.~~ ~~+ In the command bar, click **D365 ICONS** button.~~ ~~+ D365 Icons and Tooltips check some condition and show you the message bellow here.~~

	 ~~+ You passed this test.~~
~~Success Metrics:~~	~~+ You understand should grant permission run with impersonating another user~~

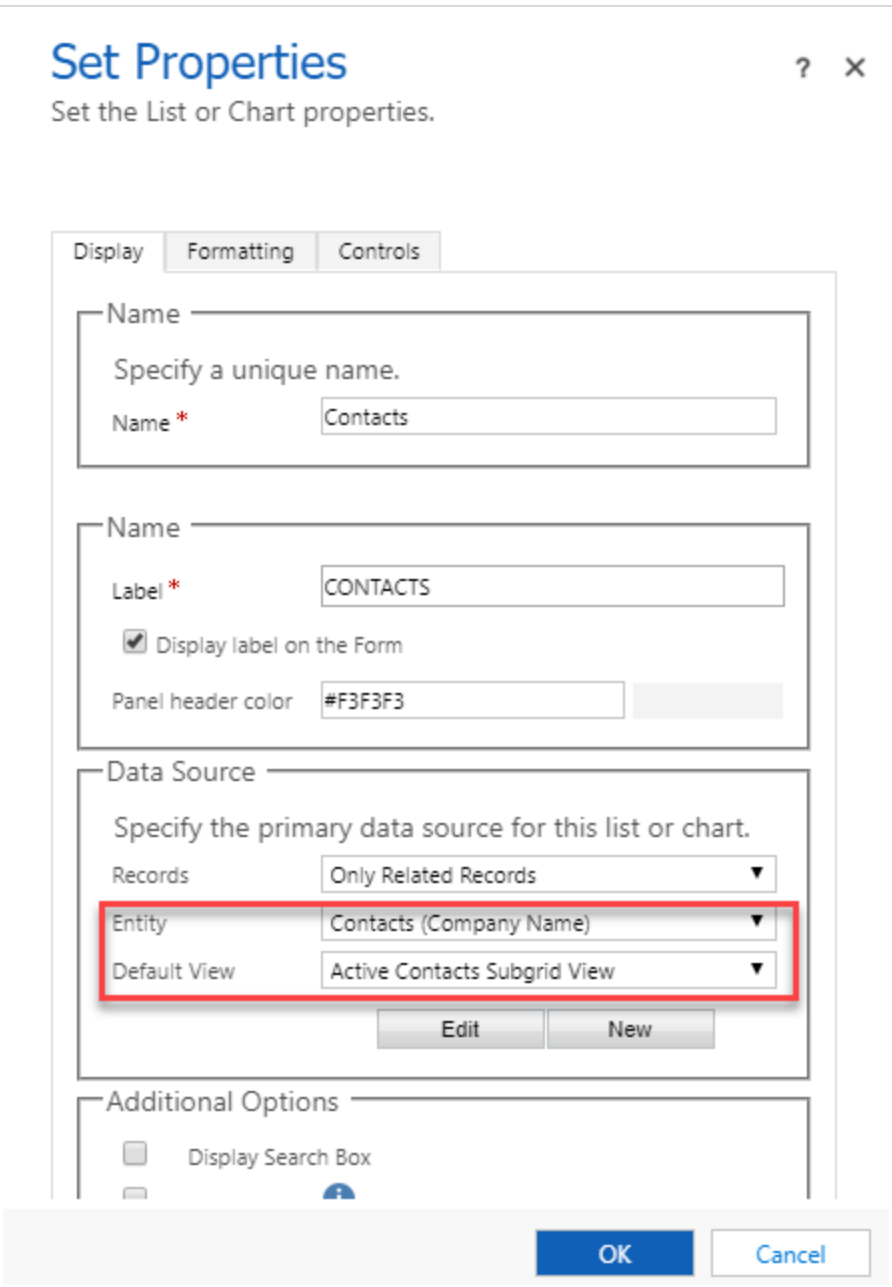
~~Test Number~~	~~**TEST02**~~
~~Primary Persona:~~	~~Customizer/System Administrator grant permission run with impersonating another user~~
~~Problem Statement:~~	~~+ You are a Customizer/System Adminstrator and~~ ~~+ You successfully installed D365 Icons and Tooltips and~~ ~~+ You DON'T grant permission run with impersonating another user~~
~~Pain Points:~~	~~+ All users CANNOT access D365 Icons and Tooltips~~
~~User Goals:~~	~~+ You can access D365 Icons and Tooltips~~
~~Business Goals:~~	~~+ All users with a correct permission can access D365 Icons and Tooltips~~
~~Detailed Steps~~	~~+ Goto **Settings** -> **Solutions** -> Open **D365 Icons and Tooltips** solution.~~ ~~+ D365 Icons and Tooltips solution opened, select **Configuration** node.~~ ~~+ In the right pane, select user you want to grant permission run with impersonating another user then click **Save Configuration.**~~  ~~+ You saw the red text: **Already Configured** that confirmed you configured.~~ ~~+ Close D365 Icons and Solution.~~ ~~+ Goto **Account** and select **All Accounts** view.~~ ~~+ In the command bar, click **D365 ICONS** button. A dialog opened allow you define D365 Icons and Tooltips.~~ ~~+ You passed this test.~~
~~Success Metrics:~~	~~+ All users with a correct permission can access D365 Icons and Tooltips~~

Test Number	**TEST03**

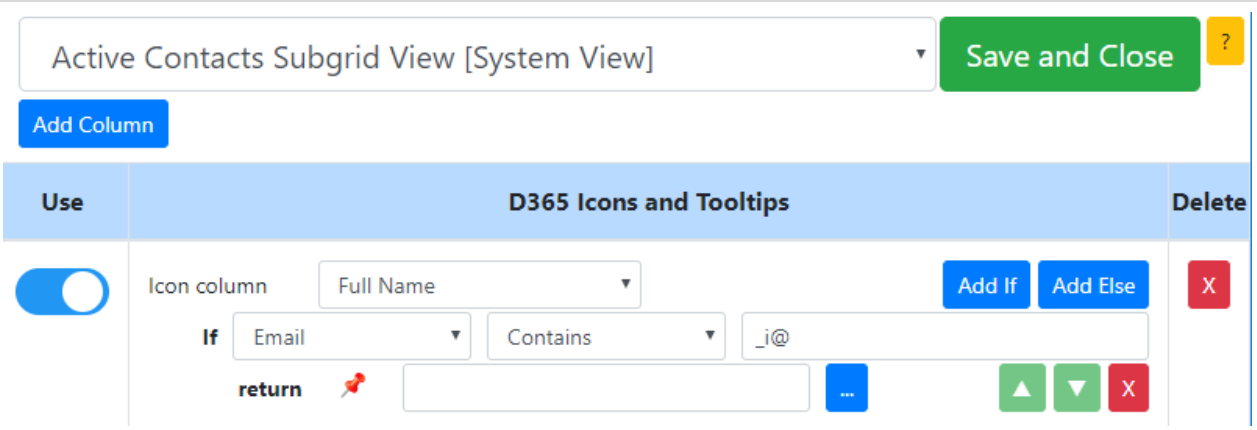
Primary Persona:	Customizer/System Administrator - Define System View
Problem Statement:	+ You are a Customizer/System Adminstrator and + D365 Icons and Tooltips installed ~~and configured~~ and + You need show Icons and Tooltips in Dynamics 365 grid.
Pain Points:	+ You need a help from developer coding to show Icons and Tooltips for each system view.
User Goals:	+ You can define Icons and Tooltips without a help from developer
Business Goals:	+ All users can see your define System View with Icons and Tooltips
Detailed Steps	+ Goto **Account** and select **All Accounts** view. + In the command bar, click **D365 ICONS** button. A dialog opened allow you define D365 Icons and Tooltips. + Define your Icons and Tooltips as picture below  + Click **Save and Close** button to close dialog and check your result. + Now, you can see Icons and Tooltips (without a help from your developer) as picture bellow.

	 + You passed this test.
Success Metrics:	+ All users can see your define System View with Icons and Tooltips

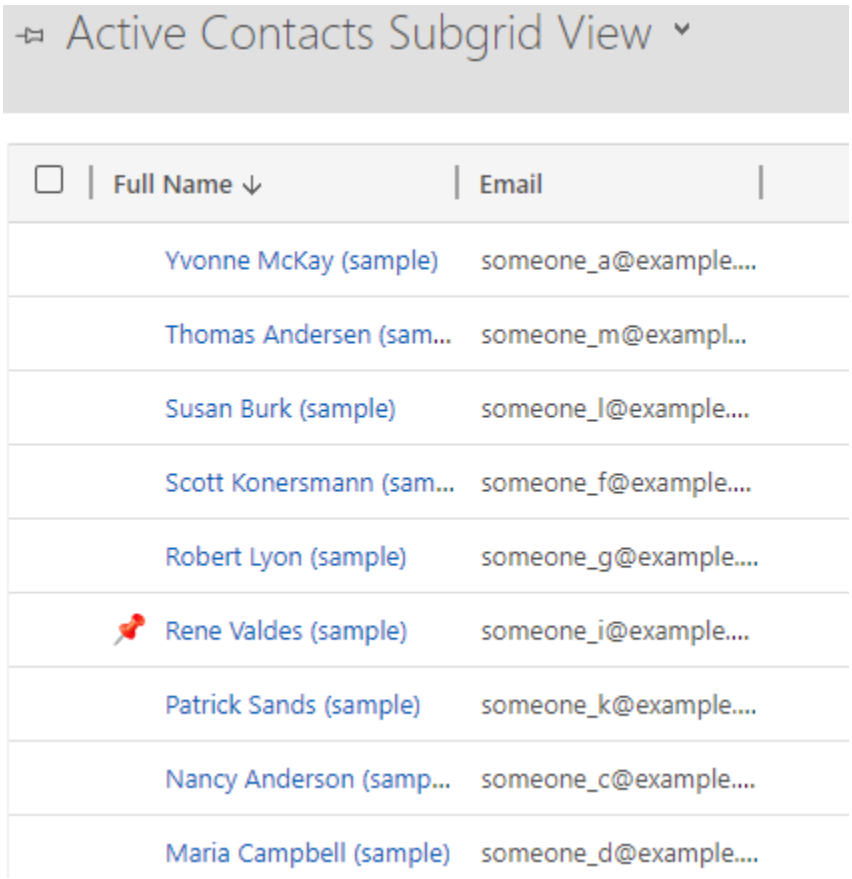
Test Number	**TEST04**
Primary Persona:	Customizer/System Administrator - Define System View for Sub-Grid
Problem Statement:	+ You are a Customizer/System Adminstrator and + D365 Icons and Tooltips installed ~~and configured~~ and + You need show Icons and Tooltips in Dynamics 365 sub-grid.
Pain Points:	+ You need a help from developer coding to show Icons and Tooltips for each system view.
User Goals:	+ You can define Icons and Tooltips without a help from developer
Business Goals:	+ All users can see your define System View with Icons and Tooltips
Detailed Steps	+ Goto **Account** and select **All Accounts** view then open Account form. + You open **Account form designer** and note the Sub-Grid view name as you can see in the picture bellow



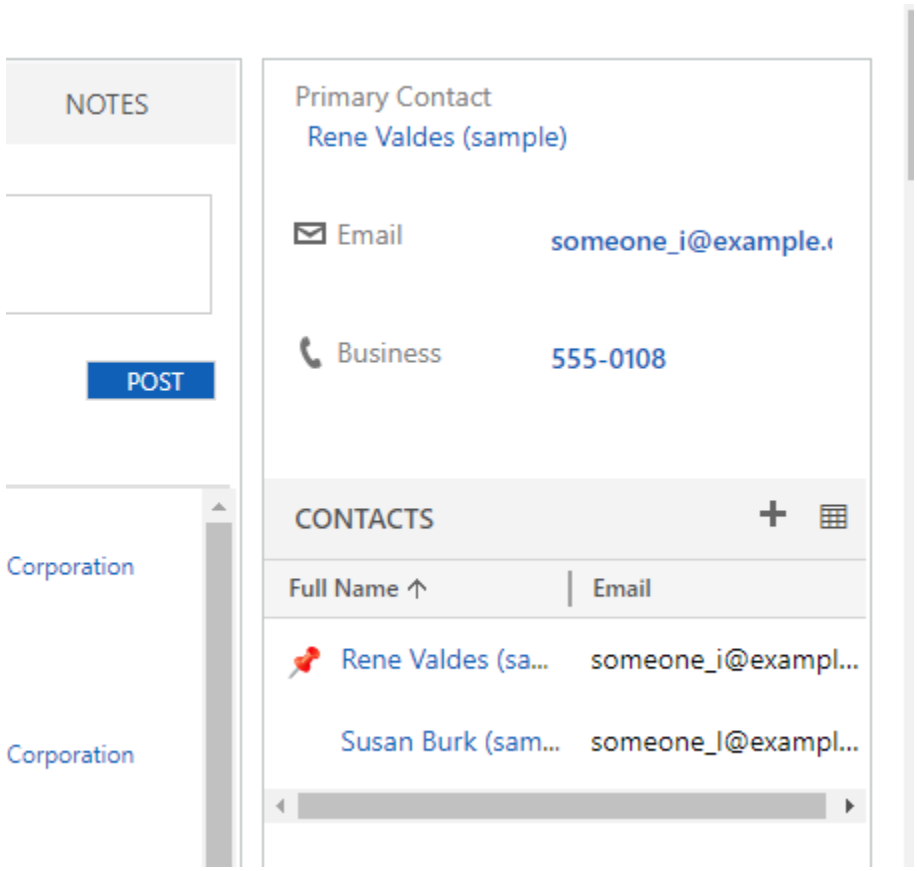
+ You go to **Contact** and select **Active Contacts Subgrid** View
+ In the command bar, click **D365 ICONS** button. A dialog opened allow you define D365 Icons and Tooltips.
+ Define your Icons and Tooltips as picture below



+ Click **Save and Close** button to close dialog and you can see Icons and Tooltips (without a help from your developer) as picture bellow.



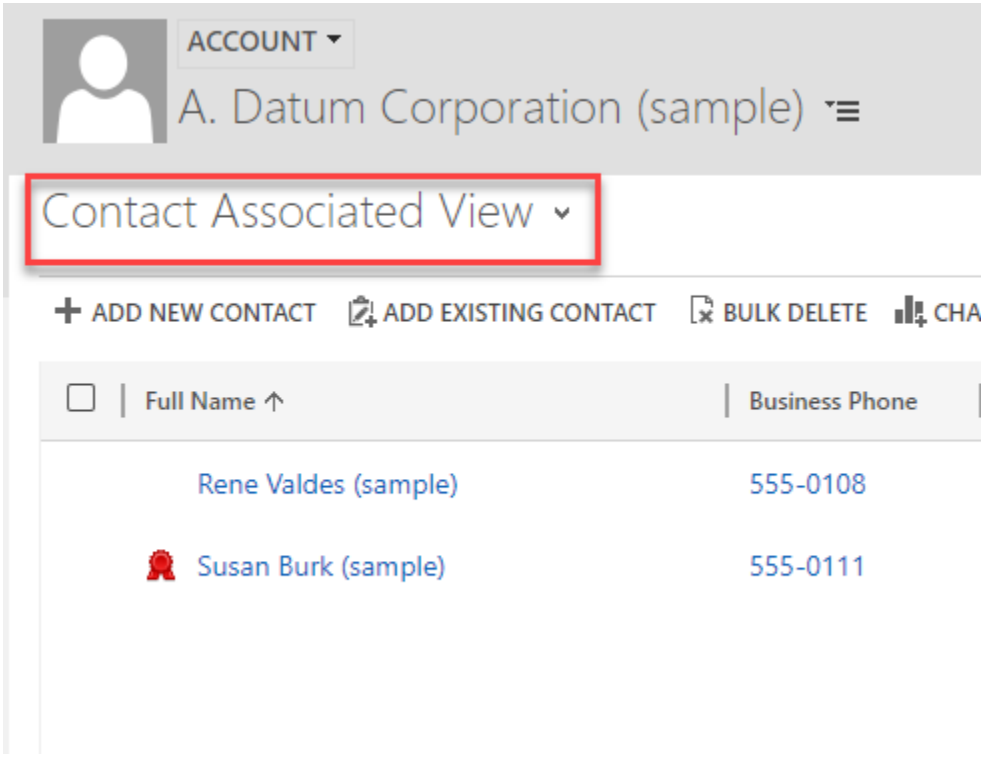
+ Goto **Account**, and open **Account form** and you can see Icons and Tooltips show in the subgrid as picture bellow.

	 + You passed this test.
Success Metrics:	+ All users can see your define System View with Icons and Tooltips

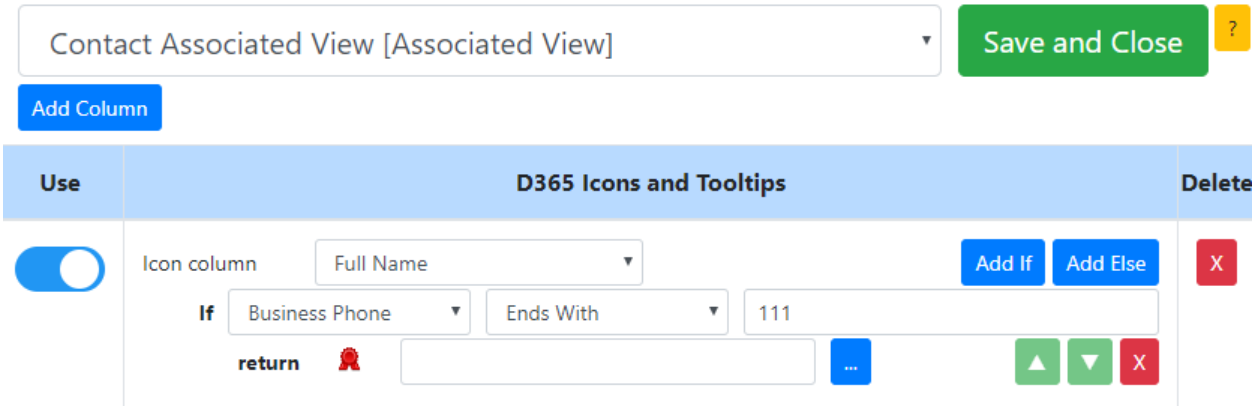
Test Number	**TEST05**
Primary Persona:	Customizer/System Administrator - Define System View for Associated Grid
Problem Statement:	+ You are a Customizer/System Adminstrator and + D365 Icons and Tooltips installed ~~and configured~~ and + You need show Icons and Tooltips in Dynamics 365 associated-grid.
Pain Points:	+ You need a help from developer coding to show Icons and Tooltips for each system view.
User Goals:	+ You can define Icons and Tooltips without a help from developer
Business Goals:	+ All users can see your define System View with Icons and Tooltips

Detailed Steps

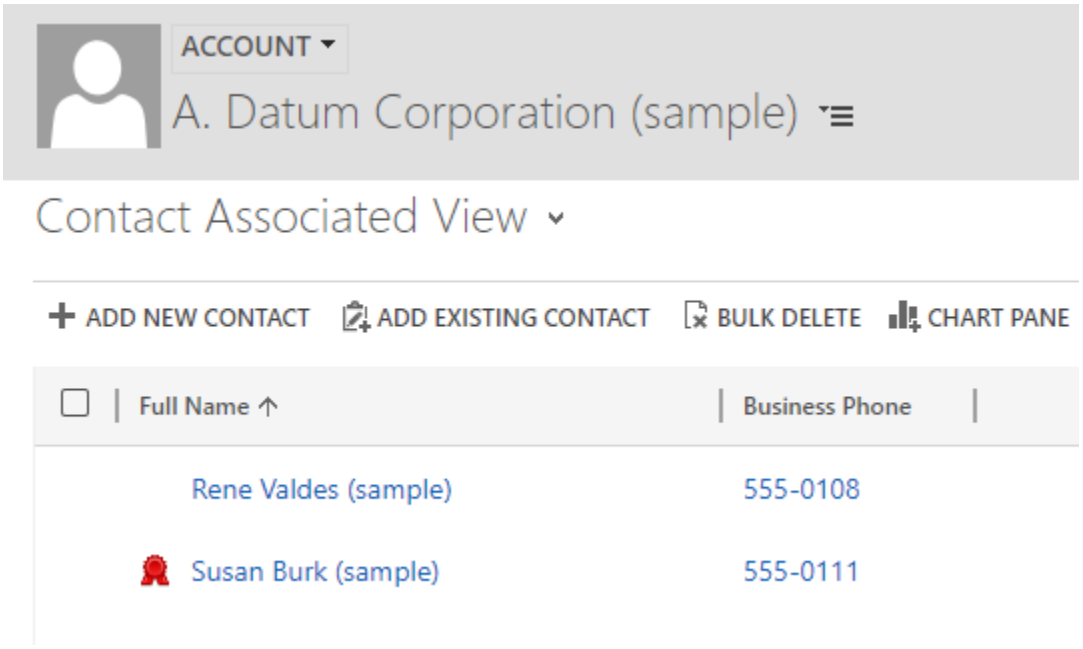
+ Goto **Account** and select **All Accounts** view then open Account form.
+ You open **Account form**, go to **Contact associated grid** and note the **Associated grid name** as picture bellow



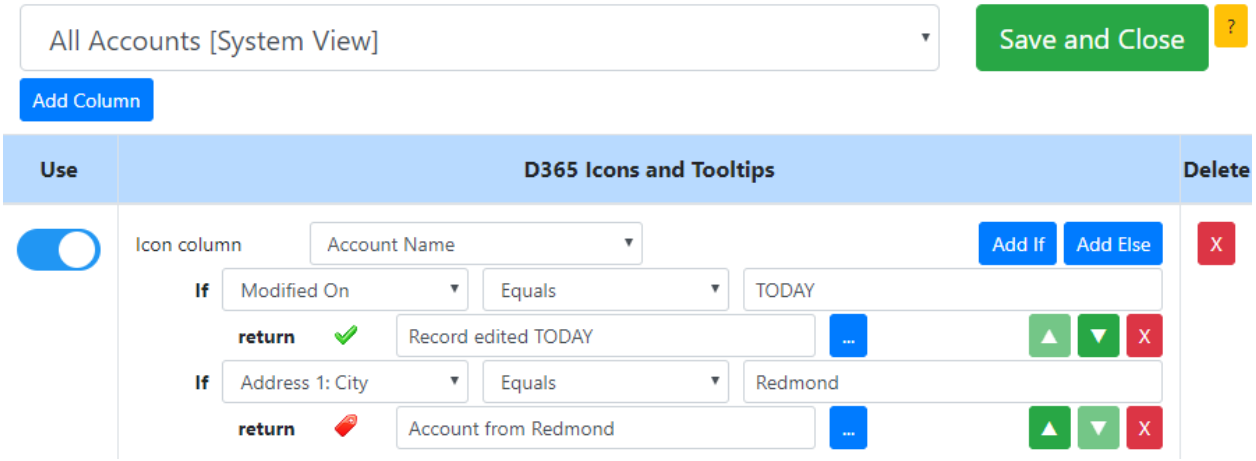
+ You go to **Contact** and with a default view.
+ In the command bar, click **D365 ICONS** button. A dialog opened allow you define D365 Icons and Tooltips.
+ In the top window, you select **Contact Associated View [Associated View]** and define your Icons and Tooltips as picture below



+ Click **Save and Close** button to close dialog and you can see Icons and Tooltips (without a help from your developer) as picture bellow.
+ You **CANNOT** preview your define because there no way you can select **Contact Associated View**
+ Goto **Account**, and open **Account form** then goto **Contact Associated grid** and you can see Icons and Tooltips show in the associated grid as picture bellow.

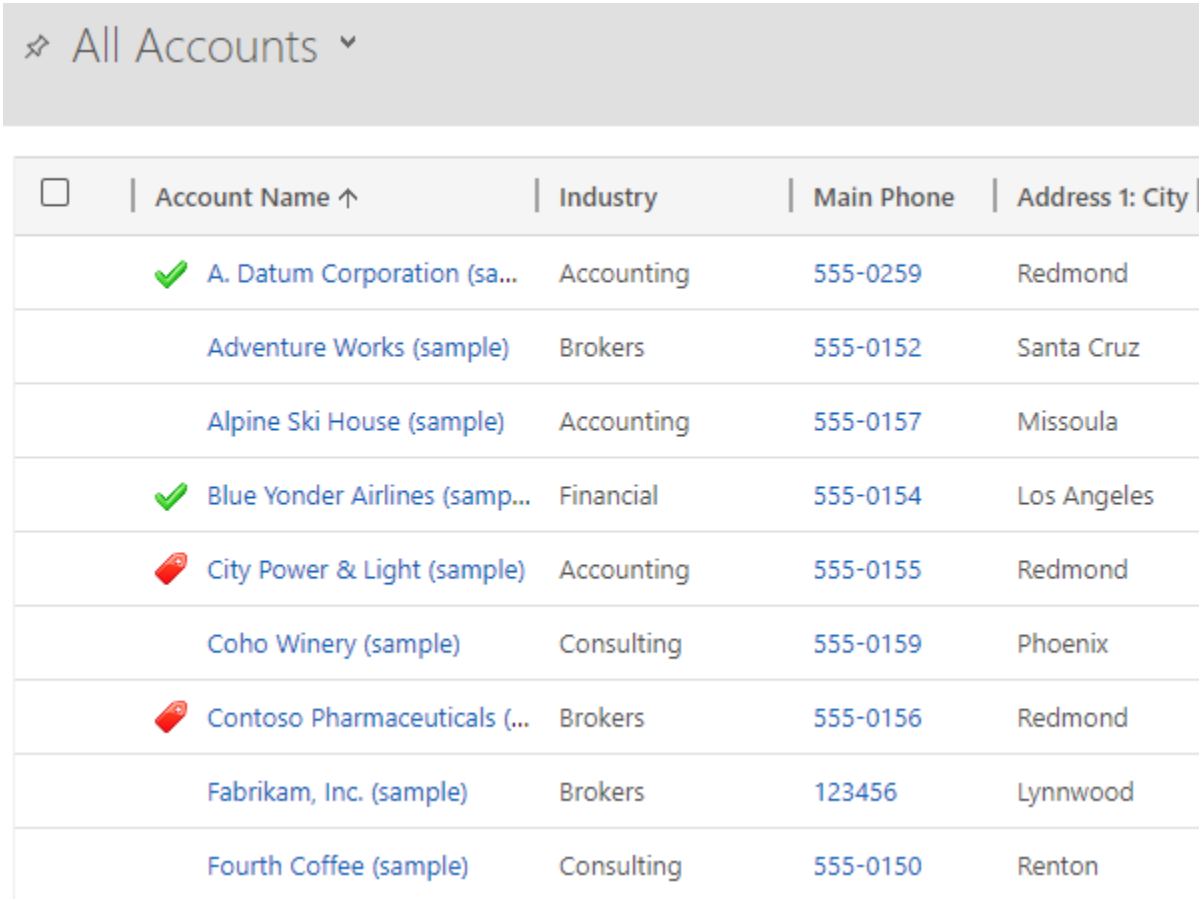
	 + You passed this test.
Success Metrics:	+ All users can see your define System View with Icons and Tooltips

Test Number	**TEST06**
Primary Persona:	Customizer/System Administrator - Define System View with Parameter
Problem Statement:	+ You are a Customizer/System Adminstrator and + D365 Icons and Tooltips installed ~~and configured~~ and + You need show Icons and Tooltips in Dynamics 365 grid.
Pain Points:	+ You need a help from developer coding to show Icons and Tooltips for each system view.
User Goals:	+ You can define Icons and Tooltips without a help from developer
Business Goals:	+ All users can see your define System View with Icons and Tooltips
Detailed Steps	+ You goto **Account** and select **All Accounts** view. + You make sure you has column **Modified On** in the **All Accounts** view. If not, add it to this view and publish. + In the command bar, click **D365 ICONS** button. A dialog opened allow you define D365 Icons and Tooltips. + You click on the **?** button in the top right conner to see the list of parameters. + You define your Icons and Tooltips as picture below



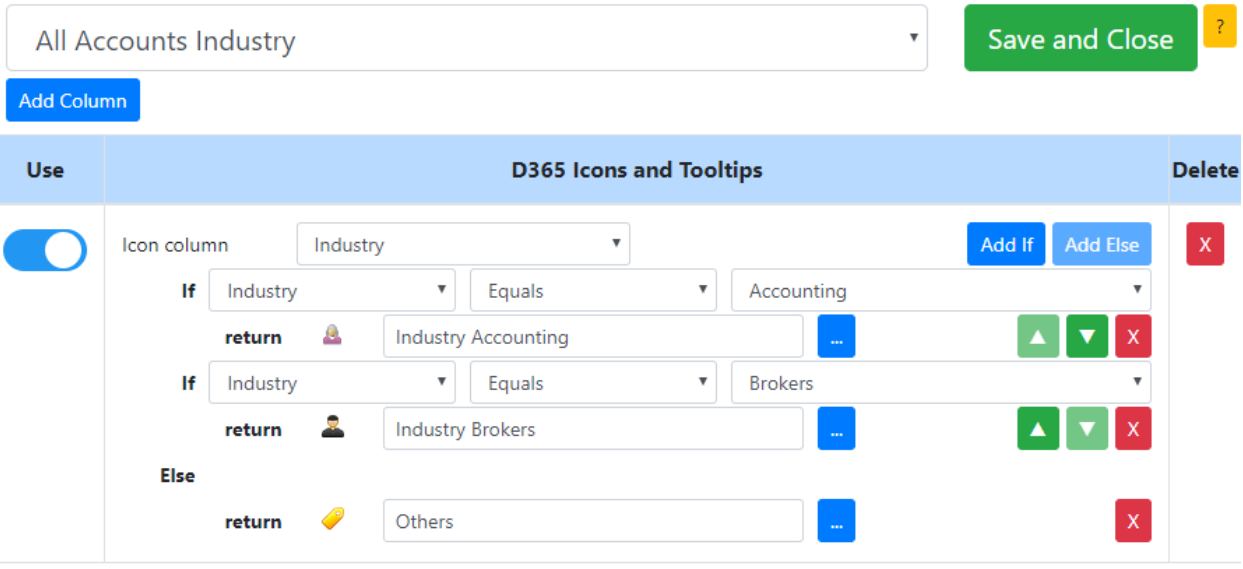
+ Click **Save and Close** button to close dialog and check your result.

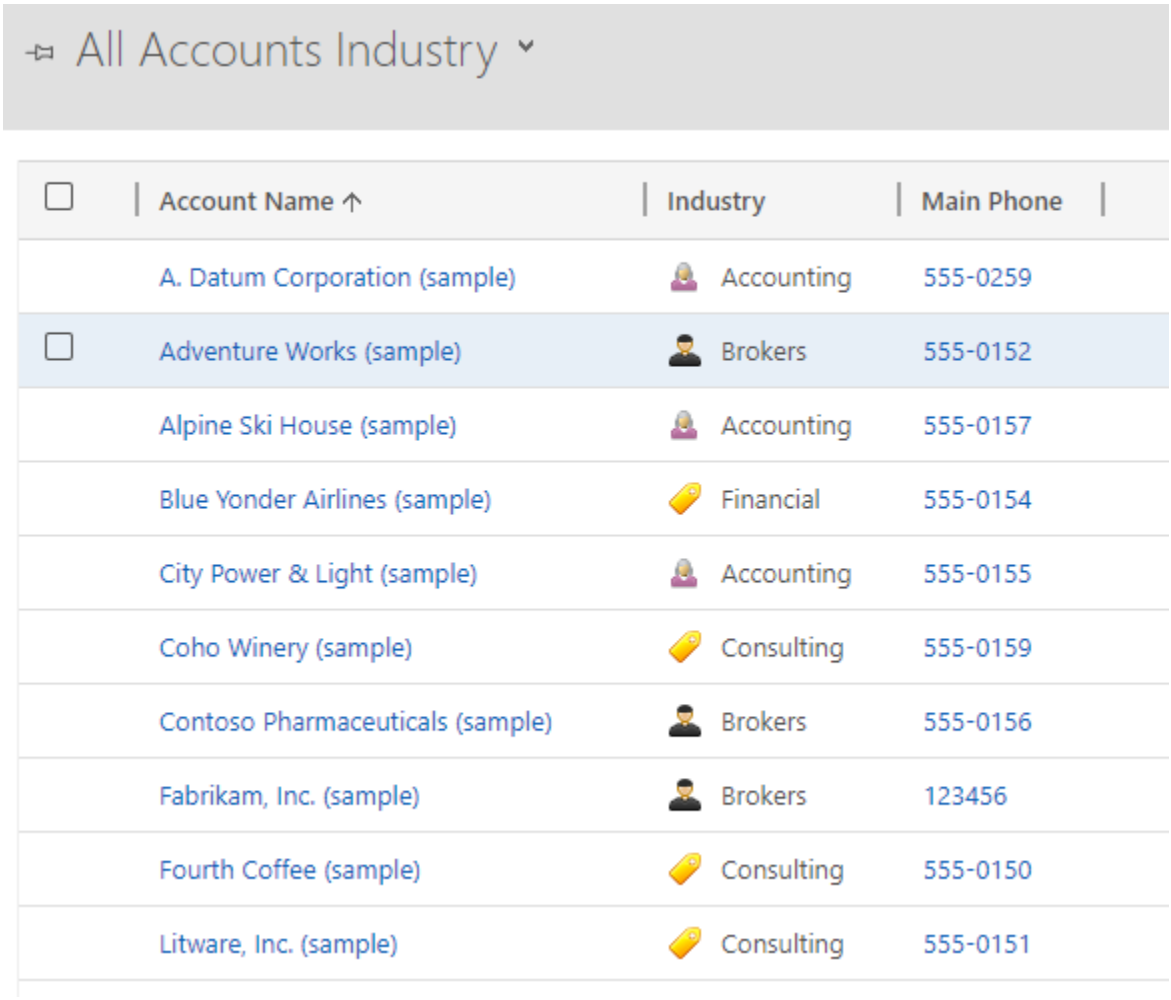
+ You can see Icons and Tooltips (without a help from your developer) as picture bellow.



+ You passed this test.

Success Metrics:	+ All users can see your define System View with Icons and Tooltips combine with parameter.

Test Number	**TEST07**
Primary Persona:	Salesperson - Define Personal View
Problem Statement:	+ You are a **Salesperson** and + D365 Icons and Tooltips installed ~~and configured by Customizer/System Adminstrator~~ and + You need show Icons and Tooltips in Dynamics 365 grid.
Pain Points:	+ You need a help from developer coding to show Icons and Tooltips for each personal view.
User Goals:	+ You can define Icons and Tooltips without a help from developer
Business Goals:	+ N/A
Detailed Steps	+ Open **Advanced Find** and define a personal view, name it like: **All Accounts Industry** + Goto **Account** and select **All Accounts Industry** view. + In the command bar, click **D365 ICONS** button. A dialog opened allow you define D365 Icons and Tooltips. + Define your Icons and Tooltips as picture below  + Click **Save and Close** button to close dialog and check your result. + Now, you can see Icons and Tooltips (without a help from your developer) as picture bellow.

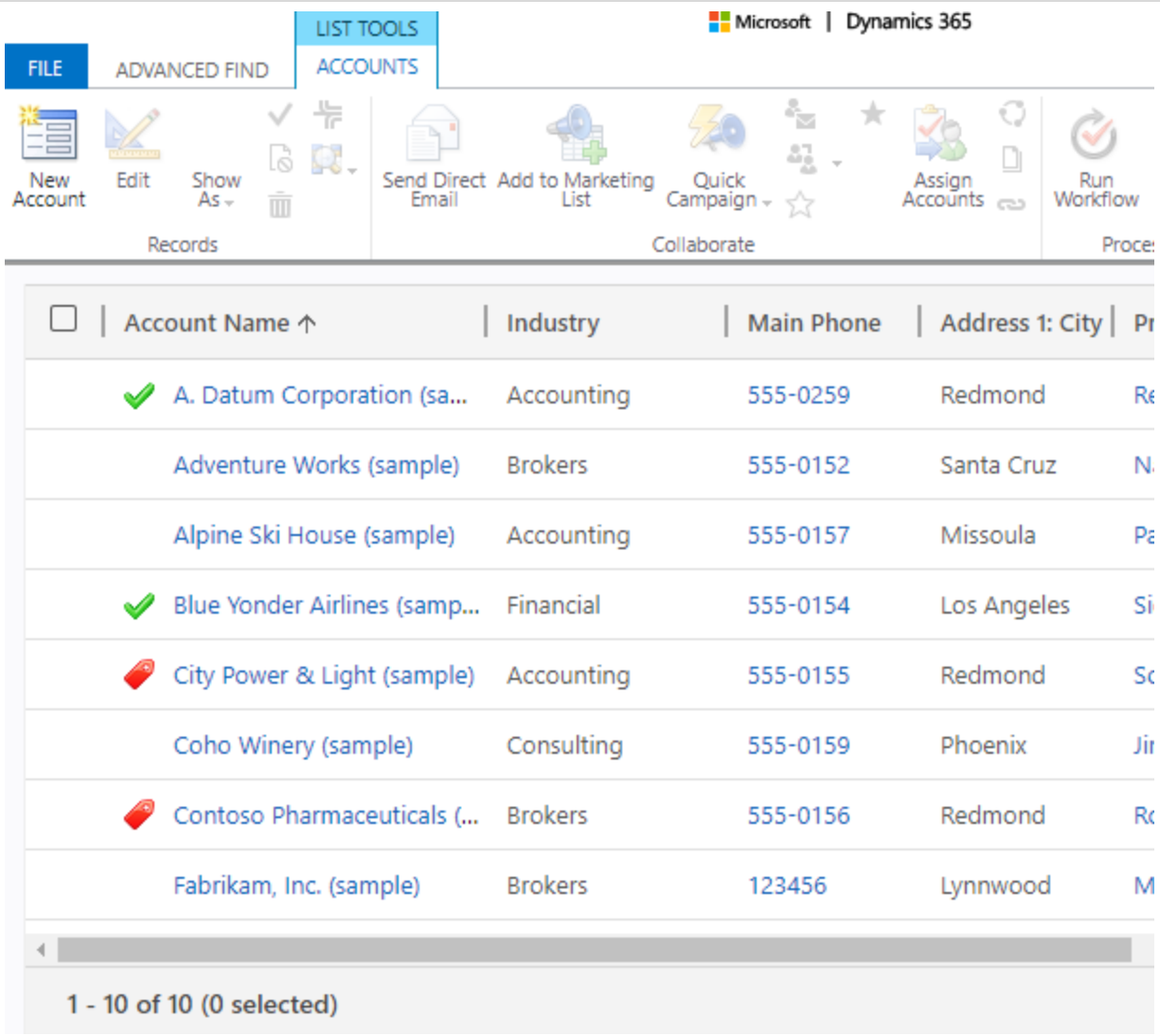


	+ You passed this test.
Success Metrics:	+ This is your personal view, only you can see your define System View with Icons and Tooltips

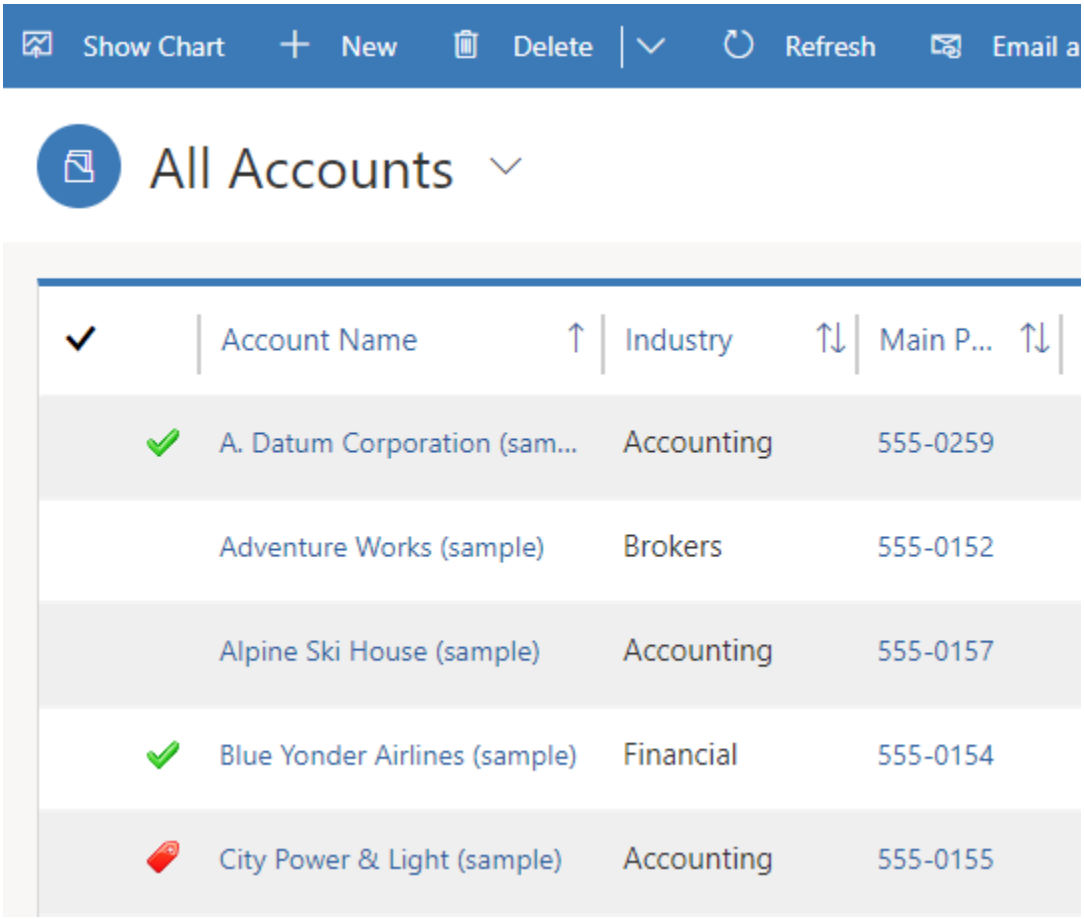
Test Number	**TEST08**
Primary Persona:	Salesperson – Verify cannot Define System View
Problem Statement:	+ You are a **Salesperson** and + D365 Icons and Tooltips installed and configured by Customizer/System Adminstrator and + You need check you CANNOT define Icons and Tooltips with System View
Pain Points:	+ N/A
User Goals:	+ N/A
Business Goals:	+ N/A

Detailed Steps	+ You goto **Account** and select **All Accounts** view. + You **DON'T** see the **D365 ICONS** button when you select System View + You can see the Icons and Toolitps Customizer/System Adminstrator already define before. + You passed this test.
Success Metrics:	+ You CANNOT define System View if you don't have security role: Customizer and/or System Administrator

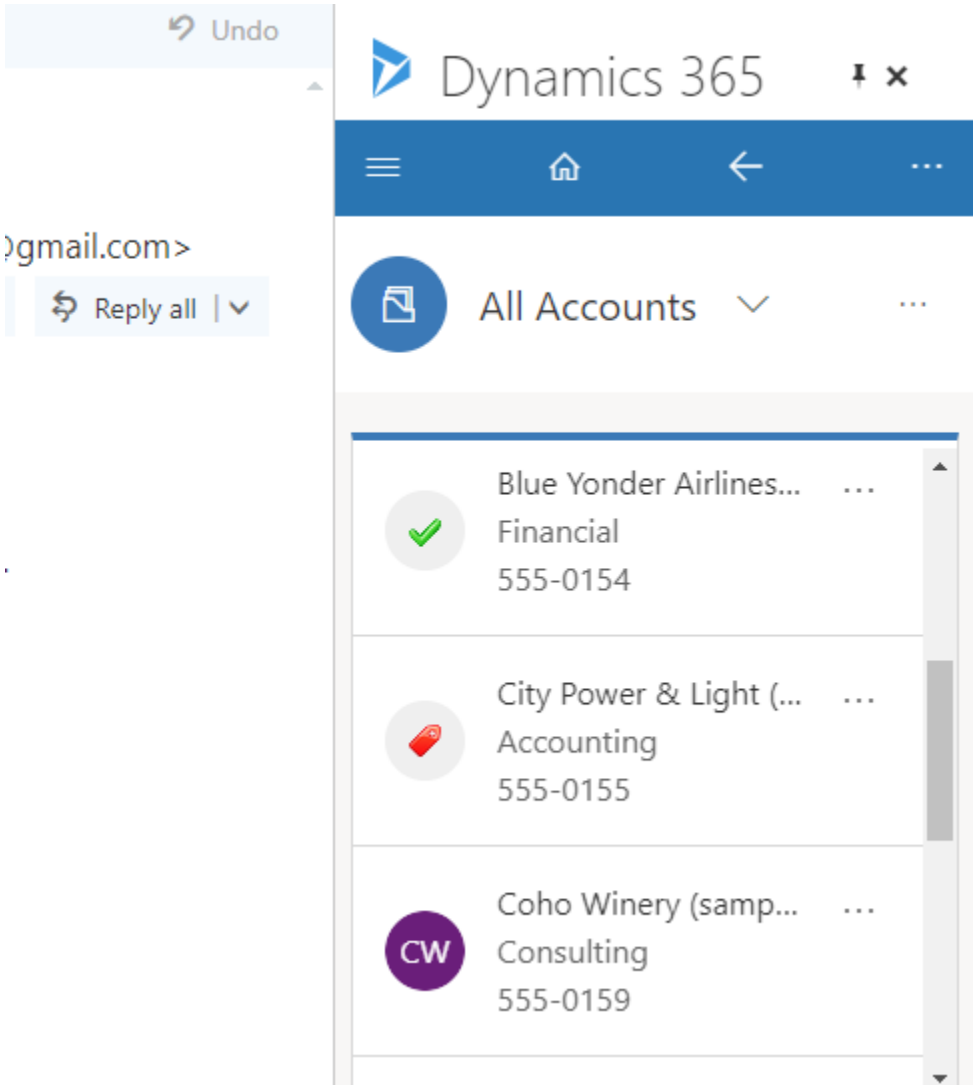
Test Number	**TEST09**
Primary Persona:	Customizer/System Administrator/Salesperson verify All Accounts in Advanced Find
Problem Statement:	+ You are a Customizer/System Administrator/Salesperson and + D365 Icons and Tooltips installed ~~and configured by Customizer/System Adminstrator~~ and + You need verify Icons and Tootlips show in the Advanced Find
Pain Points:	+ N/A
User Goals:	+ N/A
Business Goals:	+ N/A
Detailed Steps	+ You open **Advanced Find** + You select **Account** then select **All Accounts** view. + You execute results and see see the Icons and Toolitps already define before as below picture.

	 + You passed this test.
Success Metrics:	+ All users can see your define System View and/or he/she personal view with Icons and Tooltips

Test Number	**TEST10**
Primary Persona:	Customizer/System Administrator/Salesperson verify All Accounts in Unified Client Interface
Problem Statement:	+ You are a Customizer/System Administrator/Salesperson and + You make sure you are using Dynamics 365 v.9.0 and + D365 Icons and Tooltips installed and configured by Customizer/System Adminstrator and + You need verify Icons and Tootlips show in the Unified Client Interface
Pain Points:	+ N/A

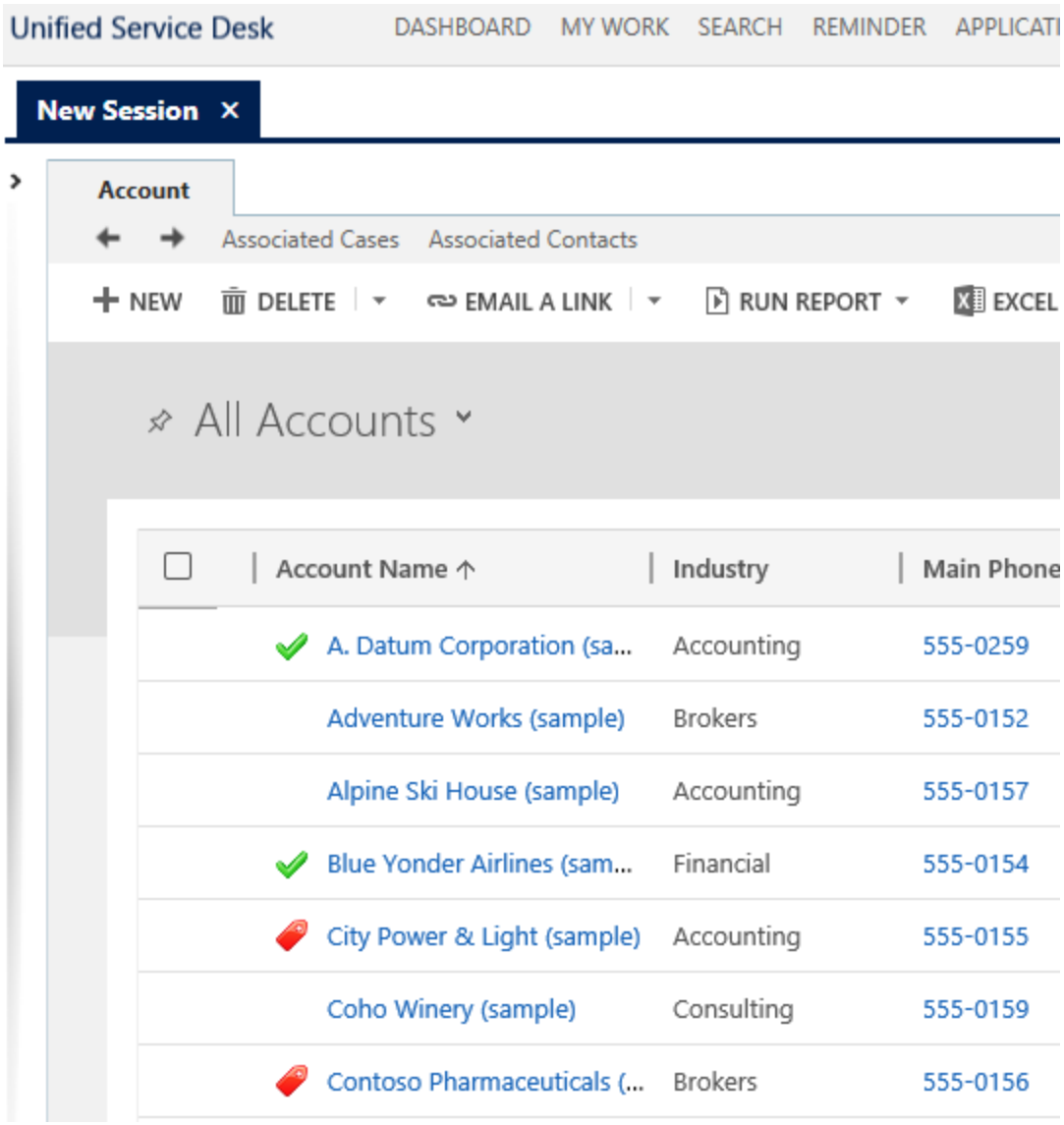
User Goals:	+ N/A
Business Goals:	+ N/A
Detailed Steps	+ You open app **CRM Hub** + You select **Account** then select **All Accounts** view. + You see the Icons and Toolitps already define before as below picture.  + You passed this test.
Success Metrics:	+ All users can see your define System View with Icons and Tooltips

Test Number	**TEST11**
Primary Persona:	Customizer/System Administrator/Salesperson verify All Accounts in Dynamics 365 App for Outlook
Problem Statement:	+ You are a Customizer/System Administrator/Salesperson and + You make sure you are using Dynamics 365 v.9.0 and + D365 Icons and Tooltips installed ~~and configured by Customizer/System Adminstrator~~ and + You need verify Icons and Tootlips show in Dynamics 365 App for Outlook

Pain Points:	+ N/A
User Goals:	+ N/A
Business Goals:	+ N/A
Detailed Steps	+ You open your email and open Dynamics 365 App for Outlook + You select **All Accounts** view. + You see the Icons and Toolitps already define before as below picture.  + You passed this test.
Success Metrics:	+ All users can see your define System View with Icons and Tooltips

Test Number	**TEST12**

Primary Persona:	Customizer/System Administrator/Salesperson verify All Accounts in Unified Service Desk
Problem Statement:	+ You are a Customizer/System Administrator/Salesperson and + You make sure you are installed Unified Service Desk and + D365 Icons and Tooltips installed ~~and configured by Customizer/System Adminstrator~~ and + You need verify Icons and Tootlips show in Unified Service Desk
Pain Points:	+ N/A
User Goals:	+ N/A
Business Goals:	+ N/A
Detailed Steps	+ You open **Unified Service Desk**. + You select **All Accounts** view. + You see the Icons and Toolitps already define before as below picture.

	 + You passed this test.
Success Metrics:	+ All users can see your define System View with Icons and Tooltips