

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.

| | |
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| Test Number | TEST04 |
| Primary Persona: | Customizer/System Administrator - Define System View with condition type AND/OR |
| Problem Statement: | + You are a Customizer/System Administrator 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 |

Account

All Accounts [System View]

Save

Add Row

?

Use

D365 Icons and Tooltips

Delete



Account Name (Primary Name)

Add If

Add Else



| | | | | | |
|----------------------------------------------------------------|-----------------------------|------------------|-------|---------|---------------|
| If | Account Name (Primary Name) | Begins With Text | Value | A | Add Condition |
| AND | Address 1: City | Equals | Value | Redmond | X |
| return Account Name Begins With Text 'A' and City = 'Redmond' | | | | | |

+ 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.

All Accounts

Account Name Begins With Text 'A' and City = 'Redmond'

| <input type="radio"/> | Account Name | Main Ph... | Address 1... | Primary Contact |
|----------------------------------|--------------------------------------------------|--------------------------|--------------|------------------------------------------|
| <input type="radio"/> | Fourth Coffee (sample) | 555-0150 | Renton | Yvonne McKay (sample) |
| <input type="radio"/> | Litware, Inc. (sample) | 555-0151 | Dallas | Susanna Stubberod (sa... |
| <input type="radio"/> | Adventure Works (sample) | 555-0152 | Santa Cruz | Nancy Anderson (sample) |
| <input type="radio"/> | Fabrikam, Inc. (sample) | 555-0153 | Lynnwood | Maria Campbell (sample) |
| <input type="radio"/> | Blue Yonder Airlines (sample) | 555-0154 | Los Angeles | Sidney Higa (sample) |
| <input type="radio"/> | City Power & Light (sample) | 555-0155 | Redmond | Scott Konersmann (sam... |
| <input type="radio"/> | Contoso Pharmaceuticals (sample) | 555-0156 | Redmond | Robert Lyon (sample) |
| <input type="radio"/> | Alpine Ski House (sample) | 555-0157 | Missoula | Paul Cannon (sample) |
| <input checked="" type="radio"/> | A. Datum Corporation (sample) | 555-0158 | Redmond | Rene Valdes (sample) |
| <input type="radio"/> | Coho Winery (sample) | 555-0159 | Phoenix | Jim Glynn (sample) |

1 - 10 of 10 (0 Selected)

+ 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)**

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|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Test Number | TEST01 |
| Primary Persona: | Verify the OOB modal window display in UCI (> v.9.1) |
| Problem Statement: | + You are a Customizer/System Administrator 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 |

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|--------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Test Number | TEST02 |
| Primary Persona: | Verify the hides columns function |
| Problem Statement: | + You are a Customizer/System Administrator 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 Administrator 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 |

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| 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: | <ul style="list-style-type: none"> + You are a Customizer/System Administrator 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 | <ul style="list-style-type: none"> + 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 contains 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.

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| 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 Administrator 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. |

| | |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <div data-bbox="334 201 1433 583"><div data-bbox="358 237 873 283"></div><div data-bbox="881 237 1195 283">.dynamics.com says</div><div data-bbox="363 310 1406 401">Your System Administrator or System Customizer does not configuration D365 Icons and Tooltips. Please ask them for your support.</div><div data-bbox="1242 489 1406 564">OK</div></div> <div data-bbox="334 594 574 621">+ You passed this test.</div> |
| Success Metrics: | <div data-bbox="334 663 1195 690">+ You understand should grant permission run with impersonating another user</div> |




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

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|-------------|--------|
| Test Number | TEST03 |
|-------------|--------|

| Primary Persona: | Customizer/System Administrator - Define System View | | | | | | | | | | | | | | | | | | | | |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------------------------------|--------------|--|--------|------------------------|-------------|--------------|---------------------------------------|--------------|--|----|-----------------|--------|---------|--|--------|----------------------|----------------------------------------|--|
| Problem Statement: | <div>+ You are a Customizer/System Adminstrator and</div> <div>+ D365 Icons and Tooltips installed and configured and</div> <div>+ You need show Icons and Tooltips in Dynamics 365 grid.</div> | | | | | | | | | | | | | | | | | | | | |
| Pain Points: | <div>+ You need a help from developer coding to show Icons and Tooltips for each system view.</div> | | | | | | | | | | | | | | | | | | | | |
| User Goals: | <div>+ You can define Icons and Tooltips without a help from developer</div> | | | | | | | | | | | | | | | | | | | | |
| Business Goals: | <div>+ All users can see your define System View with Icons and Tooltips</div> | | | | | | | | | | | | | | | | | | | | |
| Detailed Steps | <div><div><div>+ Goto Account and select All Accounts view.</div><div>+ In the command bar, click D365 ICONS button. A dialog opened allow you define D365 Icons and Tooltips.</div><div>+ Define your Icons and Tooltips as picture below</div></div><div><div><div>All Accounts [System View]</div><div>Save and Close</div><div>?</div></div><div>Add Column</div><table><tr><th>Use</th><th colspan="3">D365 Icons and Tooltips</th><th>Delete</th></tr><tr><td><div><div></div></div></td><td>Icon column</td><td>Account Name</td><td><div>Add If</div><div>Add Else</div></td><td><div>X</div></td></tr><tr><td></td><td>If</td><td>Address 1: City</td><td>Equals</td><td>Redmond</td></tr><tr><td></td><td>return</td><td>Account from Redmond</td><td><div>...</div><div></div><div></div></td><td></td></tr></table></div><div><div>+ Click Save and Close button to close dialog and check your result.</div><div>+ Now, you can see Icons and Tooltips (without a help from your developer) as picture bellow.</div></div></div> | Use | D365 Icons and Tooltips | | | Delete | <div><div></div></div> | Icon column | Account Name | <div>Add If</div> <div>Add Else</div> | <div>X</div> | | If | Address 1: City | Equals | Redmond | | return | Account from Redmond | <div>...</div> <div></div> <div></div> | |
| Use | D365 Icons and Tooltips | | | Delete | | | | | | | | | | | | | | | | | |
| <div><div></div></div> | Icon column | Account Name | <div>Add If</div> <div>Add Else</div> | <div>X</div> | | | | | | | | | | | | | | | | | |
| | If | Address 1: City | Equals | Redmond | | | | | | | | | | | | | | | | | |
| | return | Account from Redmond | <div>...</div> <div></div> <div></div> | | | | | | | | | | | | | | | | | | |

All Accounts

Address1: City = Redmond

| | Account Name | Industry | Main Phone | Address 1: City | Primary Contact | |
|--|--------------------------------------------------------------------------------------------------------------------|------------|------------|-----------------|----------------------------|--|
| |  A. Datum Corporation (sample) | Accounting | 555-0259 | Redmond | Rene Valdes (sample) | |
| | Adventure Works (sample) | Brokers | 555-0152 | Santa Cruz | Nancy Anderson (sample) | |
| | Alpine Ski House (sample) | Accounting | 555-0157 | Missoula | Paul Cannon (sample) | |
| | Blue Yonder Airlines (sample) | Financial | 555-0154 | Los Angeles | Sidney Higa (sample) | |
| |  City Power & Light (sample) | Accounting | 555-0155 | Redmond | Scott Konersmann (sample) | |
| | Coho Winery (sample) | Consulting | 555-0159 | Phoenix | Jim Glynn (sample) | |
| |  Contoso Pharmaceuticals (sample) | Brokers | 555-0156 | Redmond | Robert Lyon (sample) | |
| | Fabrikam, Inc. (sample) | Brokers | 123456 | Lynnwood | Maria Campbell (sample) | |
| | Fourth Coffee (sample) | Consulting | 555-0150 | Renton | Yvonne McKay (sample) | |
| | Litware, Inc. (sample) | Consulting | 555-0151 | Dallas | Susanna Stubberod (sample) | |

+ You passed this test.

Success Metrics:

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

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|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Test Number | TEST04 |
| Primary Persona: | Customizer/System Administrator - Define System View for Sub-Grid |
| Problem Statement: | + You are a Customizer/System Administrator 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 |

Set Properties

? X

Set the List or Chart properties.

Display Formatting Controls

Name

Specify a unique name.

Name *

Name

Label *

☒ Display label on the Form

Panel header color

Data Source

Specify the primary data source for this list or chart.

Records

Entity

Default View

Edit New

Additional Options

☐ Display Search Box

OK Cancel

+ 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

Active Contacts Subgrid View [System View]


Save and Close

Add Column

| Use | D365 Icons and Tooltips | Delete |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|
| <input checked="" type="checkbox"/> | <div>Icon column</div> <div>Full Name</div> <div><div>If</div><div>Email</div><div>Contains</div><div>_i@</div><div>return</div><div></div><div></div><div></div><div></div><div></div></div> | <div>Add If</div> <div>Add Else</div> <div>X</div> |

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

Active Contacts Subgrid View

| | Full Name ↓ | Email |
|--|----------------------------------------------------------------------------------------------------------|-----------------------|
| | Yvonne McKay (sample) | someone_a@example.... |
| | Thomas Andersen (sam... | someone_m@exampl... |
| | Susan Burk (sample) | someone_l@example.... |
| | Scott Konersmann (sam... | someone_f@example.... |
| | Robert Lyon (sample) | someone_g@example.... |
| |  Rene Valdes (sample) | someone_i@example.... |
| | Patrick Sands (sample) | someone_k@example.... |
| | Nancy Anderson (samp... | someone_c@example.... |
| | Maria Campbell (sample) | someone_d@example.... |

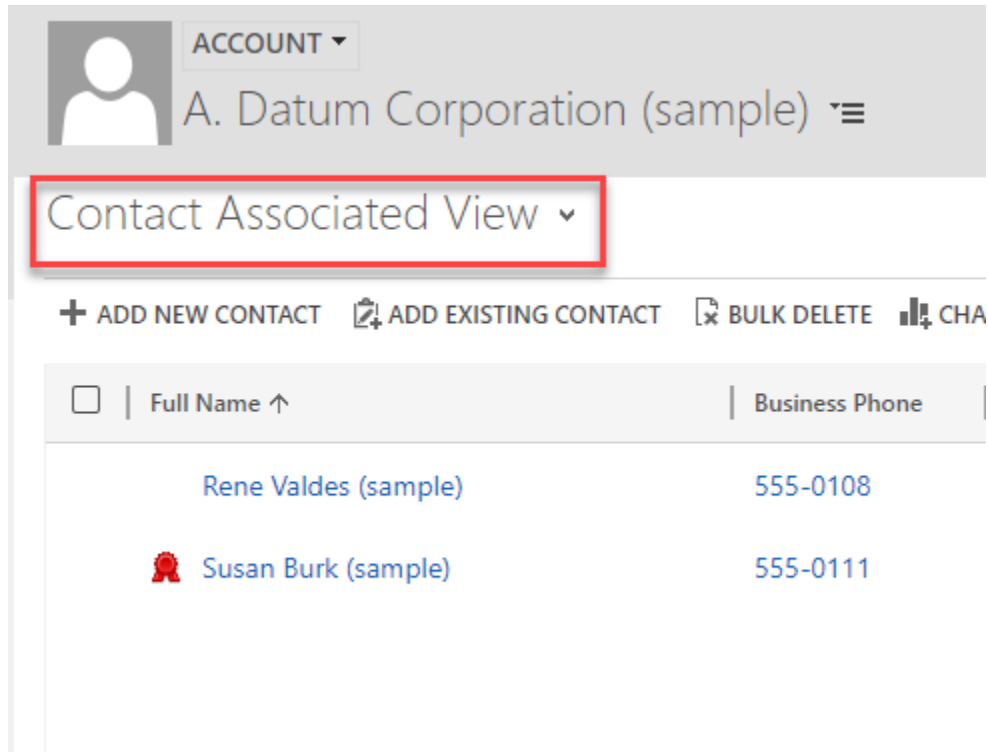
+ Goto **Account**, and open **Account form** and you can see Icons and Tooltips show in the subgrid as picture bellow.

| | |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | <div><div>NOTES</div><div></div><div>POST</div><div>Corporation</div><div>Corporation</div></div> <div><div>Primary Contact</div><div>Rene Valdes (sample)</div><div><div>Email</div><div>someone_i@example.i</div></div><div><div>Business</div><div>555-0108</div></div><div><div>CONTACTS</div><div>+</div><div></div></div><div><div>Full Name ↑</div><div>Email</div></div><div><div><div></div>Rene Valdes (sa...</div><div>someone_i@exampl...</div></div><div><div></div>Susan Burk (sam...</div><div>someone_l@exampl...</div></div> |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

+ You passed this test.

| | |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 |

- + 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



ACCOUNT ▾

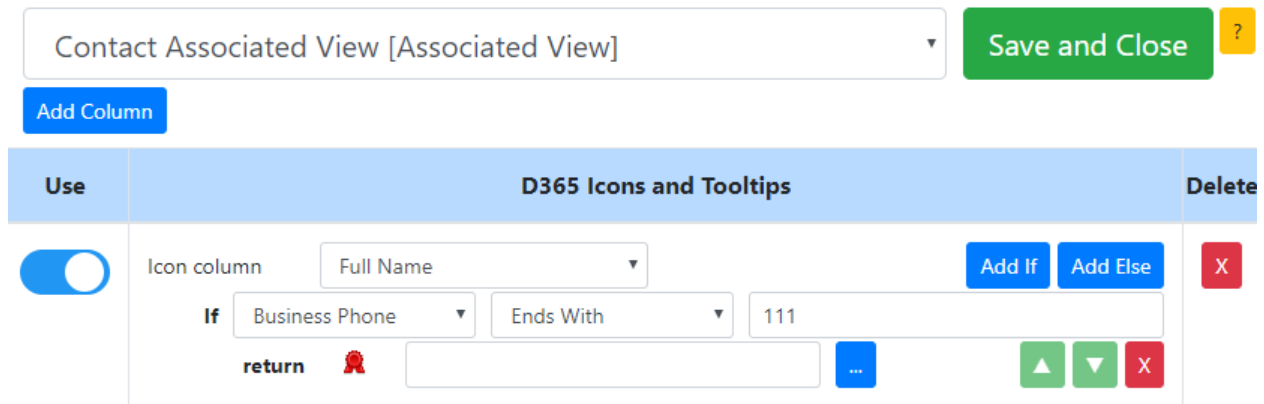
A. Datum Corporation (sample) ▾

Contact Associated View ▾

+ ADD NEW CONTACT + ADD EXISTING CONTACT BULK DELETE CHA

| <input type="checkbox"/> | Full Name ↑ | Business Phone |
|--------------------------|----------------------|----------------|
| | Rene Valdes (sample) | 555-0108 |
| | Susan Burk (sample) | 555-0111 |

- + 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 bellow



Contact Associated View [Associated View] ▾ Save and Close ?

Add Column

| Use | D365 Icons and Tooltips | | Delete |
|-------------------------------------|-------------------------|----------------------------------------|--------|
| <input checked="" type="checkbox"/> | Icon column | Full Name ▾ | |
| | If | Business Phone ▾ Ends With ▾ 111 | |
| | return | | |

- + 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.

Detailed Steps



ACCOUNT ▾

A. Datum Corporation (sample) ▮

Contact Associated View ▾

[+ ADD NEW CONTACT](#) [✎ ADD EXISTING CONTACT](#) [✕ BULK DELETE](#) [📊 CHART PANE](#)

Full Name ↑

Business Phone

Rene Valdes (sample)

555-0108



Susan Burk (sample)

555-0111

+ 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 Administrator 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

All Accounts [System View] Save and Close ?

Add Column

Use

D365 Icons and Tooltips

Delete

Icon column

Account Name

Add If

Add Else

X

If

Modified On

Equals

TODAY

return

Record edited TODAY

Return

Return

X

If

Address 1: City

Equals

Redmond

return

Account from Redmond

Return

Return

X

+ 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.

✦ All Accounts

| | Account Name ↑ | Industry | Main Phone | Address 1: City |
|---|-------------------------------|------------|------------|-----------------|
| ✔ | A. Datum Corporation (sa... | Accounting | 555-0259 | Redmond |
| | Adventure Works (sample) | Brokers | 555-0152 | Santa Cruz |
| | Alpine Ski House (sample) | Accounting | 555-0157 | Missoula |
| ✔ | Blue Yonder Airlines (samp... | Financial | 555-0154 | Los Angeles |
| 📌 | City Power & Light (sample) | Accounting | 555-0155 | Redmond |
| | Coho Winery (sample) | Consulting | 555-0159 | Phoenix |
| 📌 | Contoso Pharmaceuticals (...) | Brokers | 555-0156 | Redmond |
| | Fabrikam, Inc. (sample) | Brokers | 123456 | Lynnwood |
| | Fourth Coffee (sample) | Consulting | 555-0150 | Renton |

+ 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 Administrator 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 | <div>+ Open Advanced Find and define a personal view, name it like: All Accounts Industry</div> <div>+ Goto Account and select All Accounts Industry view.</div> <div>+ In the command bar, click D365 ICONS button. A dialog opened allow you define D365 Icons and Tooltips.</div> <div>+ Define your Icons and Tooltips as picture below</div> <div><div><div>All Accounts Industry</div><div>Save and Close</div><div>?</div></div><div>Add Column</div><table><tr><th>Use</th><th>D365 Icons and Tooltips</th><th>Delete</th></tr><tr><td><div><div></div></div></td><td><div>Icon column Industry</div><div><div>If Industry Equals Accounting</div><div>return Industry Accounting</div><div>If Industry Equals Brokers</div><div>return Industry Brokers</div><div>Else</div><div>return Others</div></div></td><td><div>X</div></td></tr></table></div> <div>+ Click Save and Close button to close dialog and check your result.</div> <div>+ Now, you can see Icons and Tooltips (without a help from your developer) as picture bellow.</div> | Use | D365 Icons and Tooltips | Delete | <div><div></div></div> | <div>Icon column Industry</div> <div><div>If Industry Equals Accounting</div><div>return Industry Accounting</div><div>If Industry Equals Brokers</div><div>return Industry Brokers</div><div>Else</div><div>return Others</div></div> | <div>X</div> |
| Use | D365 Icons and Tooltips | Delete | | | | | |
| <div><div></div></div> | <div>Icon column Industry</div> <div><div>If Industry Equals Accounting</div><div>return Industry Accounting</div><div>If Industry Equals Brokers</div><div>return Industry Brokers</div><div>Else</div><div>return Others</div></div> | <div>X</div> | | | | | |

+ 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.

All Accounts Industry ▾

| <input type="checkbox"/> | Account Name ↑ | Industry | Main Phone |
|--------------------------|----------------------------------|-------------------------------------------------------------------------------------------------|------------|
| | A. Datum Corporation (sample) |  Accounting | 555-0259 |
| <input type="checkbox"/> | Adventure Works (sample) |  Brokers | 555-0152 |
| | Alpine Ski House (sample) |  Accounting | 555-0157 |
| | Blue Yonder Airlines (sample) |  Financial | 555-0154 |
| | City Power & Light (sample) |  Accounting | 555-0155 |
| | Coho Winery (sample) |  Consulting | 555-0159 |
| | Contoso Pharmaceuticals (sample) |  Brokers | 555-0156 |
| | Fabrikam, Inc. (sample) |  Brokers | 123456 |
| | Fourth Coffee (sample) |  Consulting | 555-0150 |
| | Litware, Inc. (sample) |  Consulting | 555-0151 |

+ 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 Administrator 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 | <ul style="list-style-type: none"> + 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 Tooltips Customizer/System Administrator 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: | <ul style="list-style-type: none"> + You are a Customizer/System Administrator/Salesperson and + D365 Icons and Tooltips installed and configured by Customizer/System Administrator and + You need verify Icons and Tooltips show in the Advanced Find |
| Pain Points: | + N/A |
| User Goals: | + N/A |
| Business Goals: | + N/A |
| Detailed Steps | <ul style="list-style-type: none"> + You open Advanced Find + You select Account then select All Accounts view. + You execute results and see the Icons and Tooltips already define before as below picture. |

Microsoft | Dynamics 365

FILE

ADVANCED FIND

LIST TOOLS

ACCOUNTS

New Account

Edit

Show As

Send Direct Email

Add to Marketing List

Quick Campaign

Assign Accounts

Run Workflow

Records

Collaborate

Process

☐

Account Name ↑

Industry

Main Phone

Address 1: City

Pr

A. Datum Corporation (sa...

Accounting

555-0259

Redmond

Re

Adventure Works (sample)

Brokers

555-0152

Santa Cruz

N.

Alpine Ski House (sample)

Accounting

555-0157

Missoula

Pe

Blue Yonder Airlines (samp...

Financial

555-0154

Los Angeles

Si

City Power & Light (sample)

Accounting

555-0155

Redmond

Sc

Coho Winery (sample)

Consulting

555-0159

Phoenix

Jir

Contoso Pharmaceuticals (...)

Brokers

555-0156

Redmond

Re

Fabrikam, Inc. (sample)

Brokers

123456

Lynnwood

M

1 - 10 of 10 (0 selected)

+ You passed this test.

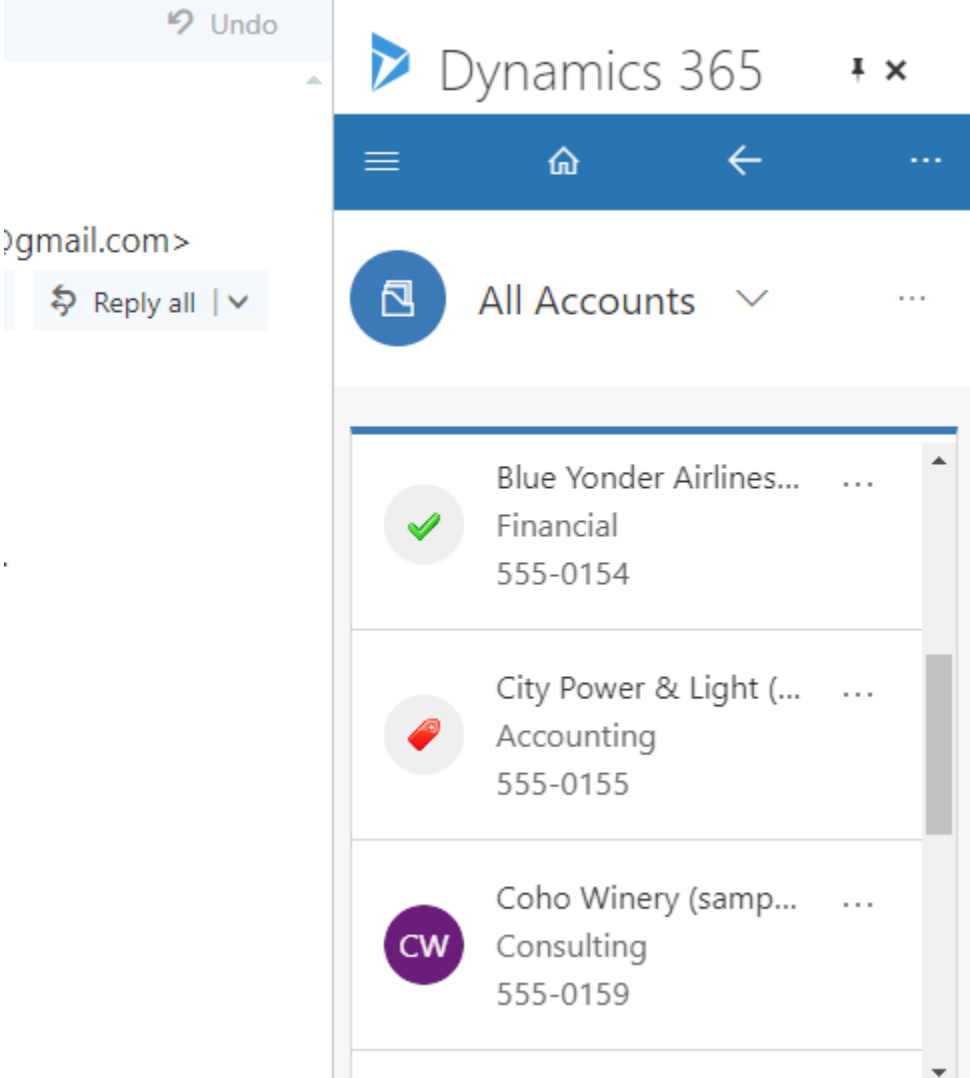
Success Metrics:

+ 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 Administrator and + You need verify Icons and Tooltips show in the Unified Client Interface |
| Pain Points: | + N/A |

| User Goals: | + N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|--------------|---|-----------|---|-----------|---|---|------------------------------|--|------------|--|----------|--|--|--------------------------|--|---------|--|----------|--|--|---------------------------|--|------------|--|----------|--|---|-------------------------------|--|-----------|--|----------|--|--|-----------------------------|--|------------|--|----------|--|
| Business Goals: | + N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Detailed Steps | <div>+ You open app CRM Hub</div> <div>+ You select Account then select All Accounts view.</div> <div>+ You see the Icons and Toolitps already define before as below picture.</div> <div><div><div>Show Chart</div><div>+</div><div>New</div><div></div><div>Delete</div><div> </div><div></div><div></div><div>Refresh</div><div></div><div>Email a</div></div><div><div></div><div>All Accounts</div><div>▼</div></div><div><table><thead><tr><th>✓</th><th>Account Name</th><th>↑</th><th>Industry</th><th>↕</th><th>Main P...</th><th>↕</th></tr></thead><tbody><tr><td>✓</td><td>A. Datum Corporation (sam...</td><td></td><td>Accounting</td><td></td><td>555-0259</td><td></td></tr><tr><td></td><td>Adventure Works (sample)</td><td></td><td>Brokers</td><td></td><td>555-0152</td><td></td></tr><tr><td></td><td>Alpine Ski House (sample)</td><td></td><td>Accounting</td><td></td><td>555-0157</td><td></td></tr><tr><td>✓</td><td>Blue Yonder Airlines (sample)</td><td></td><td>Financial</td><td></td><td>555-0154</td><td></td></tr><tr><td></td><td>City Power & Light (sample)</td><td></td><td>Accounting</td><td></td><td>555-0155</td><td></td></tr></tbody></table></div></div> <div>+ You passed this test.</div> | ✓ | Account Name | ↑ | Industry | ↕ | Main P... | ↕ | ✓ | A. Datum Corporation (sam... | | Accounting | | 555-0259 | | | Adventure Works (sample) | | Brokers | | 555-0152 | | | Alpine Ski House (sample) | | Accounting | | 555-0157 | | ✓ | Blue Yonder Airlines (sample) | | Financial | | 555-0154 | | | City Power & Light (sample) | | Accounting | | 555-0155 | |
| ✓ | Account Name | ↑ | Industry | ↕ | Main P... | ↕ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ✓ | A. Datum Corporation (sam... | | Accounting | | 555-0259 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Adventure Works (sample) | | Brokers | | 555-0152 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Alpine Ski House (sample) | | Accounting | | 555-0157 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ✓ | Blue Yonder Airlines (sample) | | Financial | | 555-0154 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | City Power & Light (sample) | | Accounting | | 555-0155 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 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: | <div>+ You are a Customizer/System Administrator/Salesperson and</div> <div>+ You make sure you are using Dynamics 365 v.9.0 and</div> <div>+ D365 Icons and Tooltips installed and configured by Customizer/System Administrator and</div> <div>+ You need verify Icons and Tooltips show in Dynamics 365 App for Outlook</div> |

| | |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pain Points: | + N/A |
| User Goals: | + N/A |
| Business Goals: | + N/A |
| Detailed Steps | <div><div><div>+ You open your email and open Dynamics 365 App for Outlook</div><div>+ You select All Accounts view.</div><div>+ You see the Icons and Toolitps already define before as below picture.</div></div><div></div><div><div>+ You passed this test.</div></div></div> |
| 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: | <div>+ You are a Customizer/System Administrator/Salesperson and</div> <div>+ You make sure you are installed Unified Service Desk and</div> <div>+ D365 Icons and Tooltips installed and configured by Customizer/System Administrator and</div> <div>+ You need verify Icons and Tooltips show in Unified Service Desk</div> |
| Pain Points: | <div>+ N/A</div> |
| User Goals: | <div>+ N/A</div> |
| Business Goals: | <div>+ N/A</div> |
| Detailed Steps | <div>+ You open Unified Service Desk.</div> <div>+ You select All Accounts view.</div> <div>+ You see the Icons and Tooltips already define before as below picture.</div> |

New Session ×



Account



Associated Cases

Associated Contacts



NEW



DELETE



EMAIL A LINK



RUN REPORT



EXCEL



All Accounts



| <input type="checkbox"/> | Account Name ↑ | Industry | Main Phone |
|--------------------------|-------------------------------|------------|------------|
| | A. Datum Corporation (sa... | Accounting | 555-0259 |
| | Adventure Works (sample) | Brokers | 555-0152 |
| | Alpine Ski House (sample) | Accounting | 555-0157 |
| | Blue Yonder Airlines (sam... | Financial | 555-0154 |
| | City Power & Light (sample) | Accounting | 555-0155 |
| | Coho Winery (sample) | Consulting | 555-0159 |
| | Contoso Pharmaceuticals (...) | Brokers | 555-0156 |

+ You passed this test.

Success Metrics:

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