

aXon upSell Medical Engineering & Pharmaceuticals

Functional Specification

Version 1.00



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Gold Customer Relationship Management
Gold Collaboration and Content
Silver Application Integration

Table of Contents

1	DOCUMENT HISTORY	3
2	INTRODUCTION	4
2.1	AXON GMBH	4
2.2	ABOUT THE DOCUMENT	4
3	BUSINESS SUMMARY	5
4	FUNCTIONALITY	6
4.1	TOUR PLANNING	6
4.1.1	<i>Setup</i>	6
4.1.2	<i>Usage</i>	7
4.1.3	<i>Customizing</i>	10
4.2	ORDER MANAGEMENT	12
4.2.1	<i>Setup</i>	12
4.2.2	<i>Usage</i>	13
4.2.3	<i>Customizing</i>	15

1 Document History

Version	Datum	Änderung durch	Kommentar
0.50	16.02.2018	Dennis Istel	Creation of document
0.60	20.02.2018	Dennis Istel	Add business summary
0.70	15.03.2018	Dennis Istel	Adding goals
0.80	19.3.2018	Dennis Istel	Specify functionality
1.00	10.4.2018	Dennis Istel	Finalize draft for appsource commit

Table 1 Document History

2 Introduction

2.1 aXon GmbH

aXon is the No.1 Agency for CRM & SharePoint! - Together with our customers we develop and promote innovative solutions for the digital age.

In the field of customer experience and customer service as well as in social and mobile enterprise we are setting new standards.

Elegant design, smart processes and passionate advice for your business success is a part of our expertise.

The aXon GmbH is an IT consultancy and system integrator for Microsoft business solutions. As a Microsoft Gold Partner our customers benefit from many years of experience in our core competencies Microsoft Dynamics CRM and SharePoint.

Together we develop your CRM and marketing strategy, sustainable sales methodologies and improve your employee skills. One thing is very important to us.

We are passionately committed to your success in CRM. You benefit from a highly motivated team, which has more than 15 years of experience and CRM expertise.

Successful cooperation means a continuous dialogue with our customers.

As a competent partner, we manage you not only effectively throughout the complete project but also offer you our support beyond it.

2.2 About the document

This document describes the business goals and needs of the product aXon upsell Medical Engineering & Pharmaceuticals. It will describe the identified pain points for our target customers and the missing functionality in Dynamics 365, which will be added by this solution.

The second half of the document will show up the functionality of the product and will give a guideline how the product can be used within Dynamics 365 and can be customized.

3 Business Summary

"As a quality producer of Pharma and Medical Engineering equipment you need a strong field sales force. Efficient tour planning, valuable services on site at the customer and a mobile order fulfillment will optimize your processes. Physicians and professional staff in medical practices, laboratories, apothecaries and hospitals have a strict and tightly synchronized scheduled, hence your field sales team has to be well structured and use the short time slot to persuade with expert advice and an efficient service.

Using the aXon mobile sales app upSell Medical Engineering & Pharmaceuticals, you increase your turnover by combining multi-channel sales with e-commerce, knowledge portal, sales control and social marketing.

upSell can also be connected to your Enterprise Resource Planning offering an integrated order and distribution process. Key features are:

Turnover & Sales Force Control

- *Strategic and operational area management*
- *Optimize customer visits, cycles, notifications and preferences*
- *Mobile route and tour planning*
- *Mobile order fulfillment and intelligent order proposals*
- *Allows different conditions, promotions and reductions*
- *Medical practice and Hospital assessments (No. of beds, physicians, specialties...)*
- *Assessment of instruments/gears and competitor's products*
- *Sample & promotion management*

Training & Service

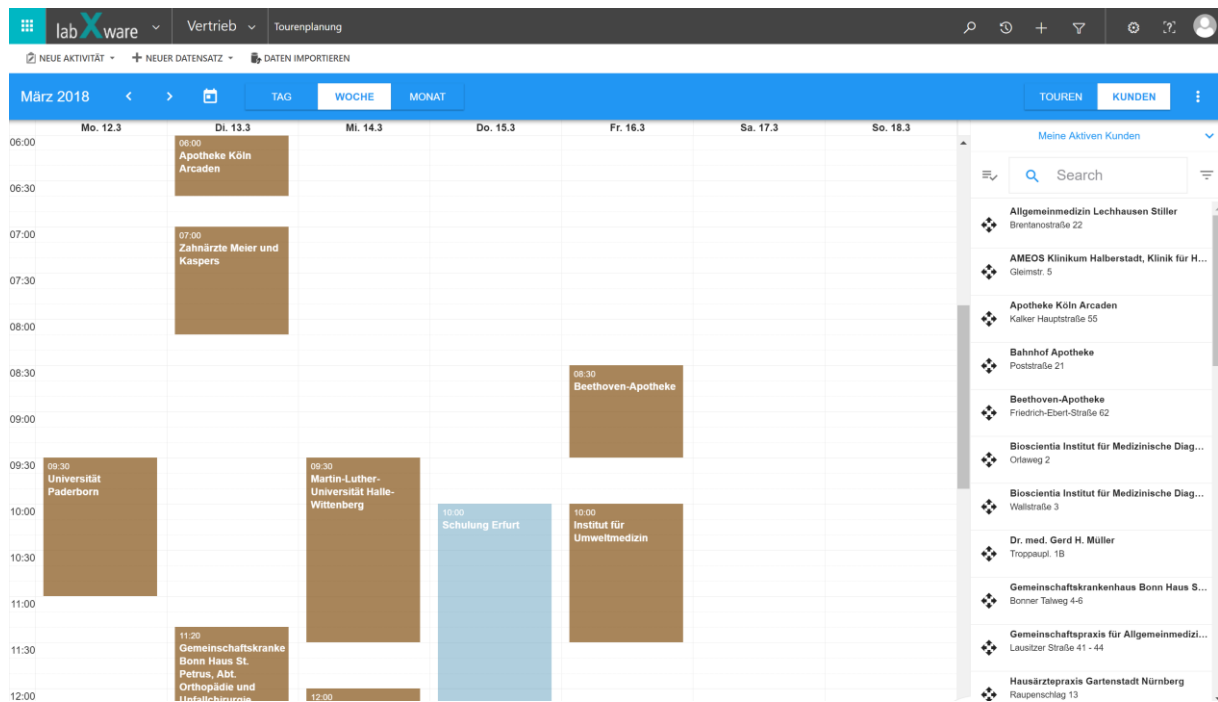
- *Correspondence and activity tracking*
- *Ingredients, medical studies and product knowledge base*
- *Loaners, consumables. field service and contracts "*

aXon GmbH experienced this problems in several Dynamics CRM/365 projects in the Pharma and consumer goods industry. With the experience of those projects, aXon decided to set up industry specific solution for Dynamics 365 to solve those problems and provide smart, easy and ready to use solution.

4 Functionality

4.1 Tour planning

The tour planning solution is a separated module within aXon upSell which can be used within Dynamics 365 or within Resco Mobile CRM (Contact us to get a Woodford Solution). The module provides a scheduling functionality in a calendar view. Appointments for customer are scheduled by several search criteria's. You can take notes on your appointments and setting up advices before visit. Scheduled tours can be saved as a template to reuse them on a later tour.

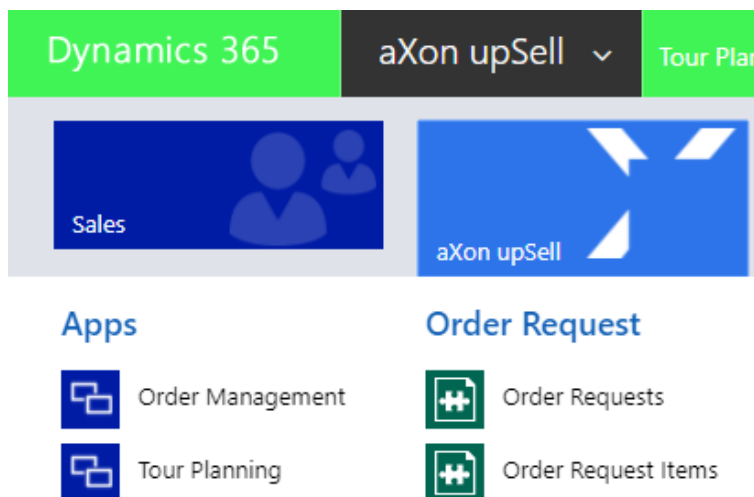


From a planner point of view you can even switch through the calendars of your employees and schedule or rearrange appointments for them.

4.1.1 Setup

After you have imported the solution from AppSource or import the managed solution directly to your system you are ready to start with the tour planning module. Just open the "aXon upSell" App in Dynamics 365 and switch to the module aXon upsell – Tour Planning.

aXon upSell – Functional specification



The module is based on the following entities:

Appointment: Appointments will be created when you drag&drop a customer to the calendar view. Every change is directly saved into an appointment

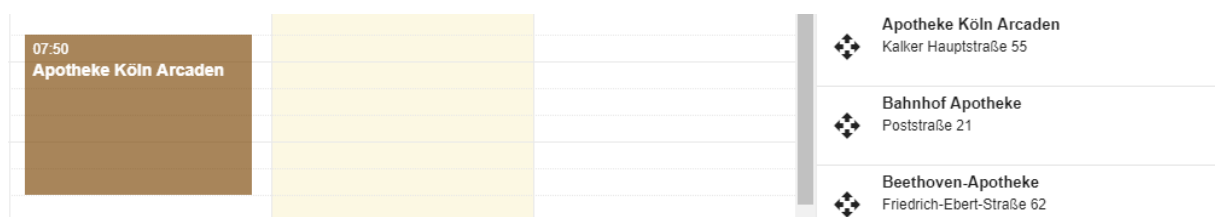
Account: Represents your customer and prospects. They are visualized on the right side pane.

Tour Template: This entity is used to save your scheduled tour as a template to reuse it later on and schedule it again.

4.1.2 Usage

Schedule an appointment

Drag a account from the right side pane and drop it on the calendar where you need it.



To adjust the duration of your appointment just increase or decrease the size of the appointment in the calendar.

If you need any more detailed information to your appointment just click on the appointment and you will get information about the customer and the appointment. This panel can be customized (check Chapter 5.1.3).

Every change within the calendar will be saved directly in the appointment. There is no separate save button.

aXon upSell – Functional specification

Search for a customer

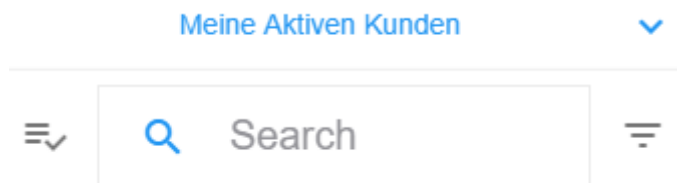
Just enter the search criteria within the search box and the right side pane will filter directly your results. The search fields can be adjusted within the configuration.

There is also an advanced find which can open by clicking the filter symbol:



In the advanced find you can filter on different criteria's. These can also be configured within the configuration.

There is also the possibility to create different views of your accounts like in Dynamics 365.



The views can be created in the configuration. The search input will always search within the selected view.

Set up a private appointment

You can schedule a private appointment with no relation to an account. On the bottom right you find a ++Icon. Just drag and drop the icon on the calendar and you configure your appointment.

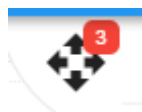


Schedule multiple appointments

Click on the left icon next to the search bar to activate the multi-select:



Now you can select multiple accounts and drag them on the calendar. After you select the accounts use the drag symbol on the top right corner to move your selection on the calendar.



aXon upSell – Functional specification

Reschedule multiple appointments

To reschedule multiple appointments just click the calendar symbol in the header next to the user name selection:



When this option is activated, you can select the appointments you want to reschedule. When you select all appointments you want to reschedule click on the 3 dots on the top right side...



...and select "Termin verschieben". Now you can select the date and all your appointments will be switched to the selected date.

Switching the user context

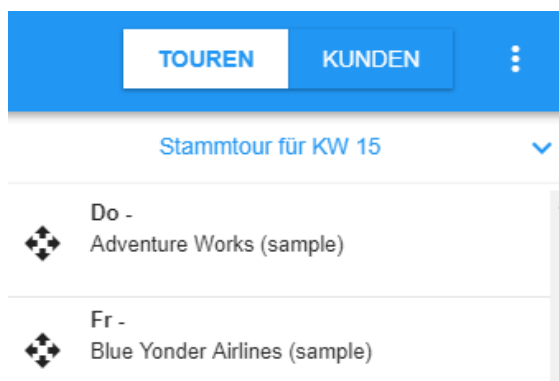
To check the appointments of a colleague or to schedule some appointments for a colleague you can switch the user context. Just click the Dropdown with your username and select the user you need:

First name Last name ▾

Saving your tour as a tour template

if you want to save the selection for the whole week as a tour template click on the 3 dots on the top right side and select "Als Stammtour speichern". You will get prompted for a name. After you have entered a name, you see a list view of all appointments in the week. You can even specify different names for the weekdays within the tour template (i.e. "Trip to Cologne"). When you are finished just click the "check"-symbol on the top right side and the template will be saved.

To select your saved tours later on just switch the right side panel from customer to tour and select your saved tour:



aXon upSell – Functional specification

You can drag each day individually everywhere you want on the calendar. These appointments are not directly saved. You have the possibility to switch the time and days or delete some of the appointments. If you are finished click on the 3 dots on the top right side and select “Alles Übernehmen”. Now the appointments are saved.

Delete an appointment

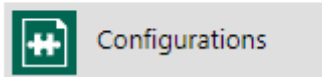
To delete an appointment just hover over the appointment and click on the red cross. After a prompt your appointment will be deleted.

4.1.3 Customizing

Most of the elements with the module can be customized with little knowledge of HTML or JSON. This chapter will show you the most important configurations.

You find the configuration within the navigation of the “aXon upsell” app. Just select the “configuration” entity.

Configurations



Here you will find many configuration records. The configurations relevant for the tour planning are starting with “tour”....

tour_appointment_query

This is a json configuration which defines all criterias and properties for the appointments which will be loaded within the tour planning module. If you need any more fields just add the fields in the “ColumnSet” section.

tour_customer_row_default

This html defines the visualization of the accounts in the right side pane. Just modify the HTML if you need more information or want to change the style. If you add more properties to the HTML you need the field names in {{fieldname}}. (Attention: The fields needs to be part of the source query or view query)

tour_customer_views

The json defined the views you can select on the right side. This is an array so you can create multiple views you need.

tour_event_popup_account

This html defines the popup window which appears when you click on an appointment.

tour_filterpanel_main_view

This html defines the advanced find you can open on the right side panel. Here you can add more fields to the advanced find and change the search criterias.

aXon upSell – Functional specification

tour_tourtemplate_config

This json defines how the tour templates get loaded (filter and fields). If you customize this entity you need enter the fields and filter you need here.

tour_tourtemplate_row

This html defines the visualization of the tour templates on the right side pane. Just like the configuration for the accounts you can customize the html for the tour templates.

4.2 Order Management

You can find the order management module also in the “aXon upsell” app. Just select “Order Management” from the section “Apps”.

The solution can also be used on Resco Mobile CRM. Just contact us for a Woodford solution.

Übersicht							
Aufträge							
Status	Bestell/ Datum	Menge	Auftragswert	Bemerkung für den Innendienst	Kunde	↑ Geändert am	Geändert von
0		4	2185.00€		Apotheke Köln Arcaden	12.04.2018 03:21:54	CRM Admin
0		7	2060.60€		Zahnärzte Meier und Kaspers	28.03.2018 11:08:40	CRM Admin
0		19	23200.00€		Zahnärzte Meier und Kaspers	08.03.2018 04:43:38	CRM Admin

To start with this app there is a more setup necessary and there are some requirements. Please refer to the next chapter.

4.2.1 Setup

The entire necessary configuration will automatically be imported when you get the solution by AppSource. But there are some requirements to work with this solution. You need to set up a product catalog in CRM to work with this app. You need to set up the following entities within your system:

Products: the product entity is used for the articles, which appear in the Order Management solution. It is necessary that the products you want to sell to your customer are within the product entity in Dynamics 365.

Pricelist: you need at least one pricelist for the app. Your products need to be set up as price list elements within the pricelist. Multiple pricelists are possible.

Pricelist element: Your products must be associated with the pricelist. To do this you need to set up a pricelist element for each product you want to use within the order management solution. The price you set up in the element will be displayed within the order management solution.

There are 3 ways how can associate the pricelist with your accounts:

- 1.) Setting up the default pricelist in the account
- 2.) Setting up the N:N relation within the pricelist to the account (multiple pricelist per customer)
- 3.) Creating a customer group and setting the customer group in relation with an account and the pricelist

There are additional entities, which will be provided by aXon upSell:

Customer Groups: This is a custom entity which you can use to associate pricelists with your customer. i.e. you set up a customer group “Labs” and associate (N:N) your pricelist with this customer group. The next steps is that you associate the customer group with all your laboratories accounts. Now the associated pricelist will get used within the order management solution.

Order Request: The order, which is created from the order management solution. It is just an request because there more backend processes needed to fulfill the order. I.e. integrate the order request entity within ERP system.

aXon upSell – Functional specification

Order Request Items: The items within the order request. This is similar to the order request. To have no dependencies on existing CRM process custom entities were created for this use case.

Assortment: This entity is not used in this solution. This entity is needed for the consumer goods solution.

Listing: This entity is not used in this solution. This entity is needed for the consumer goods solution.

If you are testing the solution on a new and blank environment, you just need to install the Dynamics 365 Sample Data (Data Management → Install Sample Data). After that, all prerequisites are created. You just need to associate the sample price list with the accounts in one of the mentioned ways.

4.2.2 Usage

Selecting a customer

When you start in the order management app, you will see an overview of your latest order requests. To select a specific customer and create a new order request click on the customer icon on the top left side and select a customer:



Now the customer is selected and you will see some basic information of your customer. The latest order requests are filtered on that specific customer. You can now create a new order request by clicking the “+” icon on the top right side:



Creating an order request

After you clicked on the “+” icon which was mentioned on the previous step you are within the order request form. Now you will see all the items based on the pricelists for that customer. To enter a new line just click on the product or enter the quantity in the quantity field. You will see that the price from the pricelist will appear. There is also an aggregation of the quantity and value in the footer.

You have also the possibility to search for specific products if you have many products within your order request. Just enter your search term in the search bar on the top right and the list will be filtered.

You can also filter by your specific pricelists defined for the customer. Just click the filter icon and select the pricelists you want to see.



aXon upSell – Functional specification

When you are finished taking the order and you want to make yourself an overview of your order you can click on the “shopping cart” symbol. Now you will only see the product lines which were taken for this order request.



If there are some lines you want to remove, you just need to click on the “bin” icon.



Now you have a multi select on your captured items. Select the lines you want to delete. To confirm your selection click on the red “check” icon on the top left side.



When you completely finished your order click on the “check” icon on the top right side.



Now your order request is saved and the order request form closes.

Edit an order request

Just click on an order request you created earlier from within the order request overview. The order request form will appear and you can work on the order just as described before.

Show up detailed product information

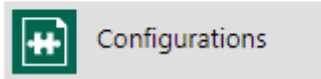
To see detailed product information you need to click on the 3 dots on a product line within the order request form and select “details”. A popup window will appear with some detailed information to that product (you can customize this popup within the configuration).

4.2.3 Customizing

Most of the elements with the module can be customized with little knowledge of HTML or JSON. This chapter will show you the most important configurations.

You find the configuration within the navigation of the “aXon upsell” app. Just select the “configuration” entity.

Configurations



Here you will find many configuration records. The configurations relevant for the tour planning are starting with “omgt”....

omgt_edit_customer_info

This HTML describes the Customer info within the order request form when you click on the icon next to the customer name. You can customize this to get more information about the customer or setup even a hyperlink to the account record itself.

omgt_edit_filterpanel

The HTML definition for the pricelist filter within the order request form. You need to customize this if you want to change the appearance or need more information in the panel.

omgt_edit_footer_template

This is the html definition for the footer in the order request form. If you want to show more fields or other aggregations, you need to change this configuration.

omgt_edit_grid_config

This is a JSON definition for the data in order request form grid, which displays the product lines. You can define filter on the grid and define the columns you want to see in the form. You can even configure the search columns here.

omgt_home_grid_config

This is a JSON definition for the data in order request overview grid, which displays the order requests. You can define filter on the grid and define the columns you want to see in the list. You can even configure the search columns here.

omgt_home_header_template

This HTML defines the information which will be displayed when you select a customer in the order request overview. You can change the layout and fields which are shown.

omgt_product_infoview

This is the HTML definition for the product detail popup in the order request form. You can specify the product information you show up or even show some product pictures.