**Tagging E2E Scenario**

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| Primary Persona: | Customer Service Agent |
| Configuration Settings | Client: Web Client (Browsers: Chrome, Firefox, Edge, IE, Opera)  CRM: 2013 - 365 |
| Problem / Opportunity Statement: | A Simple tagging solution that allows to "Tag" any record in CRM |
| Pain Points: | No possibility to organize and share information using convenient “tags” a lot of people get used to |
| User Goals: | Possibility to “Tag” any record in CRM |
| Business Goals: | * Additional way to categorize, organize and share information * additional entry points to information |
| Triggers: | * Open record and add tags entering them in Tags window * Find records “tagged” with the desired tag from dashboards section |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Plans: Currently - Free for basic version  Actions: adds tags to records; searches for all records tagged with any tag; builds dashboards and tags clouds;  Objects: dynamics CRM managed solution (DNL.Tagging) |
| Detailed Steps | |  |  | | --- | --- | | Step | Expected Result | | 1. Install the app | In the CRM there will be a new Dashboard (Dynamica Tagboard) and new forms (which contain section with web resource added on top) on following entities: Account, Case, Contact, Contract, Email, Fax, Invoice, Lead, Letter, Marketing List, Opportunity, Order, Phone Call, Quote. | | 2. Open Account/Contact/Any record of the type listed above and switch form (Form: Account\_tagging)/Contact \_tagging)/etc or you can also add Tagging web resource on any of your existing forms | The Tagging Form of the Account/Contact/etc with the Tags section in the upper right corner of the form will be opened. | | 3. Add tags to the tagging area | Added tags will appear In the Tags section | | 4. Go to the Dashboard and choose the “Dynamica Tagboard” | A dashboard (Dynamica Tagboard) displays information about the tags that exist in the system | | 5. Click on the tag name on “Connections to Tag View” in the left bottom of Dynamica Tagboard | Records tagged with selected tag will be shown in the view | | 6. Delete or rename the tag | The tag will be renamed or deleted. | | 7. Go to the Dashboard and choose the “DNL Tagboard” | A dashboard (Dynamica Tagboard) will display updated information about the tags. |   For more information please check **Dynamica Tagging – User Guide.docx** |
| Success Metrics: | CRM record “tagged” with newly created or existent tag can be found by searching for records tagged with this tag. |