

Using Microsoft Dynamics CRM for Business Process Management: A Curriculum Package for Business Process Management or Supply Chain Management Courses

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Abstract: The *IS 2010 Curriculum Guidelines (IS2010)*, sponsored by the ACM and AIS, lists Business Process Management as an elective new core course for a student majoring in information technology (IT), management information systems (MIS), or computer science (CS). This course is also suitable for a student majoring in supply chain management (SCM) or accounting information systems (AIS). The purpose of this curriculum package is to demonstrate how to use the Microsoft Dynamics CRM as a tool in business process management or supply chain management courses.

Keywords: business process management, Microsoft Dynamics CRM, curriculum packages

INTRODUCTION TO BPM

The *IS 2010 Curriculum Guidelines for Undergraduate Degree Programs in Information Systems* from the Association for Computing Machinery (ACM) and the Association for Information Systems (AIS) is the most popular set of curriculum standards for MIS and CIS majors (Topi, et al., 2010). The *IS 2010 Curriculum Guidelines* lists Business Process Management as an elective course for majors in computer information systems (CIS), information technology (IT), management information systems (MIS), and computer science (CS). The course is also suitable for such technically oriented business major fields of study as supply chain management (SCM) or accounting information systems (AIS).

Aalst van der, ter Hofstede, and Weske (2003, p. 1) indicate that business process management (BPM) “includes methods, techniques, and tools to support the design, enactment, management, and analysis of operational business processes.” This definition is similar to the catalog description of BPM course in *IS 2010 Curriculum Guidelines*:

“In this course students will be introduced to key concepts and approaches to business process management and improvement. The main focus of this course is both understanding and designing business processes. Students will learn how to identify, document, model, assess, and improve core business processes. Students will be introduced to process design principles. The way in which information technology can be used to manage, transform, and improve business processes is discussed. Students will be exposed to challenges and approaches to organizational change, domestic and offshore outsourcing, and inter-organizational processes.”

While traditional BPM focuses on operational performance or efficiency (Hammer, 2007; Ravesteyn, 2009), this paper focuses on the BMP principles which are applied to enterprise software. An example of BMP principles is segregation of duties (Brunsdon, Romney, & Steinbart, 2009). Business process management is important for students because it serves as a design principle for major software for enterprise resources planning (ERP) systems, customer relationship management (CRM) systems, and supply chain management (SCM) software. Another reason supporting its importance is the auditing requirements in the Sarbanes-Oxley Act of 2002.

BPM AND ENTERPRISE SOFTWARE

A company needs software which can clearly divide the company’s job tasks and responsibilities that the company has. These job tasks should be assigned to different employees or security roles in the company. While many employees prefer to use spreadsheet programs such as Excel or simple accounting software to handle accounting/business tasks, these software packages do not provide the features needed to handle auditing’s complex requirements. Therefore, many companies seek software which provides these features.

Complex ERP or CRM software normally provides clearly delineated business processes for different functions. Business processes are further divided into sub-processes and tasks. These software packages also provide such features as security roles which can match different processes and tasks. As Figure 1 shows, sales process management in Microsoft Dynamics CRM can be divided into such major processes as leads, opportunities, and orders. CRM can also divide sales process management into order, invoice, and payment. Figure 2 shows a screen shot of security tasks in Microsoft Dynamics GP. Figure 3 shows a screen shot of security roles in Microsoft Dynamics GP (Chen et al., 2010). Security tasks can be assigned to security roles as shown in Figure 4.

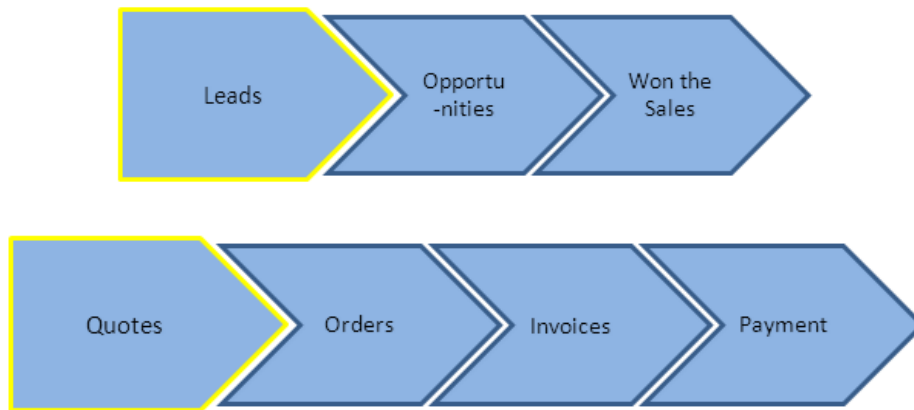


Figure 1: Business process in the sales module in Microsoft Dynamics CRM

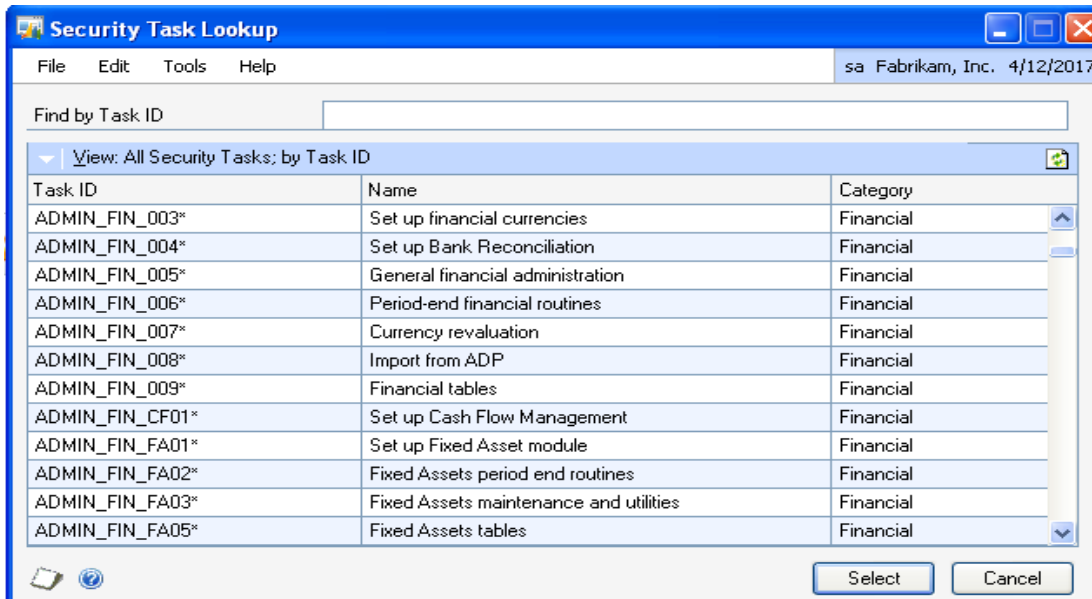


Figure 2: Security tasks in Microsoft Dynamics GP

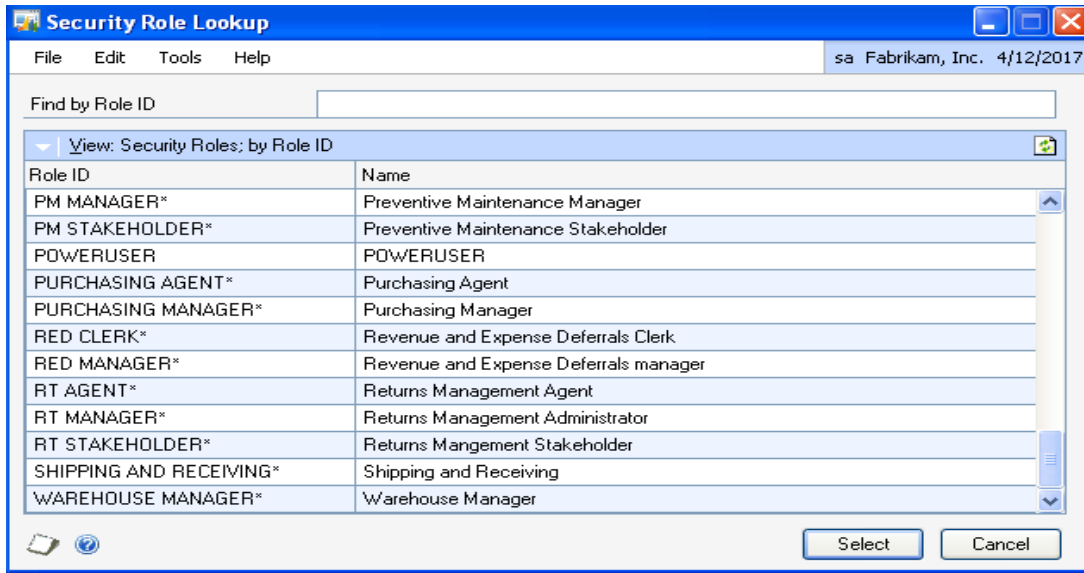


Figure 3: Security roles in Microsoft Dynamics GP

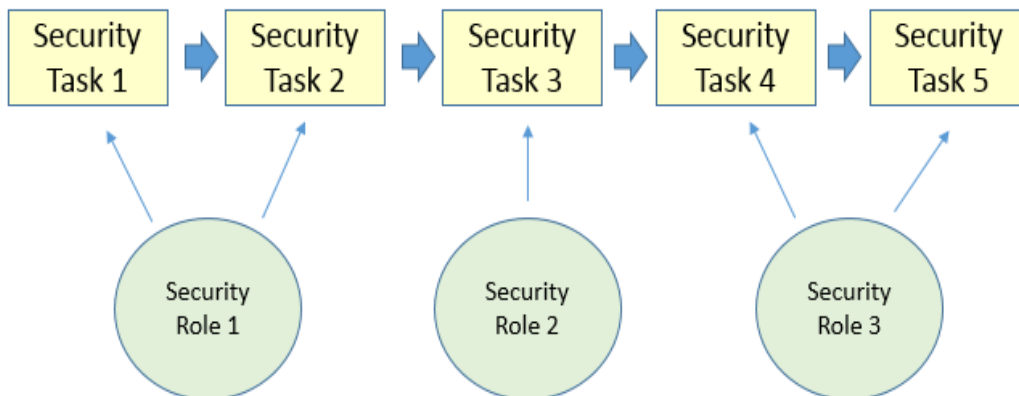


Figure 4: Security tasks/roles assignment

Another reason for companies to adopt ERP or CRM is workflow management, a feature that helps managers better to monitor and control the process flow (Aalst van der & van Hee, 2004). For example, suppose a customer complains that he has made an order a long time ago but has not received the product. To solve the problem, the salesperson can look into the process flow and find out why the order has not been delivered--perhaps the product is still in the warehouse and the shipping department forgot to send it out. By tracing the process flow, the salesperson is able to pinpoint the problem and solve it.

Despite the importance of the BPM course, faculty members who teach this course tend to focus more on concept, principle, or case studies than on practical aspects. Only a few professors will focus on the hands-on exercises of realistic ERP/CRM software. Three main reasons explain this. The first is that setting up ERP or CRM software is time consuming if the instructor wants to do it by him or herself. The second reason there is very little step-by-step, hands-on material available in the market for BPM-related software. The third reason is that it is often considered a

bad strategy for young faculty members in research universities to spend too much time teaching instead of researching.

However, the job market for IS/IT specialists is becoming increasingly competitive. Graduates with practical experience in one or two of the ERP/CRM software packages that are available are in a better position for job hunting than those with just theoretical knowledge. To enrich the content of business process management or supply chain management courses then, this paper recommends a curriculum package that uses the Microsoft Dynamics CRM program as a tool to understand the practical sides of BPM or SCM. Microsoft Dynamics CRM is suitable for an introductory class because the program's content is easy to understand. In addition, CRM is a cloud-based software available free from Microsoft Dynamics. When students understand CRM, they are able to move to more complex ERP applications.

THE CURRICULUM PACKAGE FOR THE BMP COURSE

The Instructional Award Committee of the 2013 North American Advisory Council of Microsoft Dynamics Academic Alliance suggested that an effective sample BPM curriculum package should include the following items (Schultz, T., personal communication, February, 2013):

1. A brief outline of the class lecture or demonstration (e.g., something you would provide students or attendees as an agenda for the class);
2. If applicable, an identification of any reading or study materials assigned before the class (e.g., dynamics documentation or e-learning, book chapters, videos); the materials themselves are not required, just a sense of what they would be;
3. If applicable, slide show decks, handouts, or other materials used during the lecture or demonstration;
4. If applicable, a sense of follow up assignments or assessments which could be given to students as a result of the class."

In addition, we believe that a good curriculum package should include the following materials:

1. A course description as described in a curriculum standard like the *IS 2010 Curriculum Guidelines*,
2. Sample syllabi,
3. Sample step-by-step assignments, and
4. Available instructional material.

In the paper, we followed the suggestions from Award Committee and included the following materials for using Microsoft Dynamics CRM:

1. A brief outline for the class (see Appendix I),
2. Reading materials before the class (see Appendix II),
3. Materials used during the class (see Appendix III), and
4. Follow-up assignments and assessment plan (see Appendix IV).

USING MICROSOFT DYNAMICS CRM FOR TEACHING

The instructor who has never used the Microsoft Dynamics CRM before is likely to have two immediate concerns: 1) How do I start using Microsoft Dynamics; and 2) Do I have to pay for the license? The good thing is that, since the software has cloud-based access, the instructor does not have to install the software. And, students can use their own computers as long as they have Internet access and have installed Internet Explorer. Unlike the SAP Academic Alliance, the instructors or schools do not have to pay any fee to become a Microsoft Dynamics Academic Alliance member.

An instructor has three ways to access Microsoft Dynamics CRM:

- 1) Apply for a 30-day free trial from the following website: <http://crm.dynamics.com>,
- 2) Ask the Microsoft Dynamics Academic Alliance (DynAA) to provide a free license for a semester, or
- 3) Create a course server so that students can access CRM in a local area network or the Internet. The software is free if the instructor sends a request to Microsoft Dynamics Academic Alliances.

As shown in Appendix III, this paper gives the step by step instruction described in the assignment handouts for the first method.

ASSESSMENT PLAN AND SURVEY RESULTS

Based on the curriculum package, we designed a handout to give to students to do the assignments. After the assignments, students filled out a survey regarding their satisfaction with the handouts and software. We were interested in finding out the following assessment questions:

- 1) Is Microsoft Dynamics CRM interesting to students?
- 2) Is Microsoft Dynamics CRM more interesting to students than an ERP system?
- 3) Is the remote access method is better than the lab access method for students?

Normally students prefer to use remote access because of its 24/7 accessibility; however speed is sometimes a problem. Therefore, we also wanted to know the following:

- 4) Is the speed for the remote access to Microsoft Dynamics CRM appropriate?

We installed the Microsoft Dynamics CRM 2011 on a server equipped with an Intel Core i3-3220 CPU with 12 gigabytes of random access memory of. Students then accessed the CRM though a website address (<http://50.241.208.85>). Students finished two CRM assignments in IS 627 (Business Process Management). Figure 5 shows the short-version of the assessment questionnaire they filled out at the end of the curriculum package. We conducted this assessment test from March to April, 2013.

Because of the limited number of students in IS 627 (Business Process Management), the sample size is 22. Since this is less than 30, a statistical test cannot be conducted. Table 1 presents the results. The responses to question 1 indicate that students are interested in Dynamics CRM ($\mu=4.36$). Question 5 shows that students are less satisfied with the remote access speed ($\mu=3.68$) because of the access speed subscribed by us is an economic mode from an ISP. In addition, the RAM is only 12 gigabytes. However, students prefer to access CRM through the web rather than in a computer lab

1.	Microsoft Dynamics CRM is interesting to me.				
	1	2	3	4	5
	Not at all				Completely Agree
2.	Microsoft Dynamics CRM is more interesting than Microsoft Dynamics GP.				
	1	2	3	4	5
	Not at all				Completely Agree
3.	The assignment for Microsoft Dynamics CRM is helpful for me to understand CRM.				
	1	2	3	4	5
	Not at all				Completely Agree
4.	The remote access method is better than the lab access.				
	1	2	3	4	5
	Not at all				Completely Agree
5.	The speed for the remote access to Microsoft Dynamics CRM is appropriate.				
	1	2	3	4	5
	Not at all				Completely Agree

Figure 5: Assessment questionnaire

Table 1: Assessment results

Question	Means (μ)	Standard Deviation (σ)	Min	Max	Medium	Mode
1. Microsoft Dynamics CRM is interesting to me.	4.36	0.64	3	5	4	5
2. Microsoft Dynamics CRM is more interesting than Microsoft Dynamics GP.	3.86	1.06	1	5	4	4
3. The assignment for Microsoft Dynamics CRM is helpful for me to understand CRM.	4.50	0.66	3	5	5	5
4. The remote access method is better than the lab access.	4.05	1.22	1	5	5	5
5. The speed for the remote access to Microsoft Dynamics CRM is appropriate.	3.68	0.82	2	5	4	4

CONCLUSIONS

This paper provides a curriculum package for using Microsoft Dynamics CRM in teaching business process management. Although the complexity of business process management in CRM is less than in an ERP system, it is a good way for most instructors starting to teach BPM courses. If students have a strong background in production/operations management, the instructor may use production planning which involves demand planning, MPS, MRP, purchase orders, or production orders. While the results are mixed, students in general think it is positive to use practical software to learn the BPM concept. Further assessment focus on more students on a better equipped server.

Appendixes

I. Outline (Agenda) for the Class

A. Lecture (15 – 20 minutes)

1. Introduction to supply chain management (SCM) & business process management (BPM)
2. Major CRM systems
3. Why do we choose Microsoft Dynamics CRM in SCM and BPM courses?
4. Important features of Microsoft Dynamics CRM
5. An example: sales management processes using Microsoft Dynamics CRM
6. The dashboard in Microsoft Dynamics CRM
7. Security and auditing features of Microsoft Dynamics CRM
8. Social CRM and mobile devices

B. Step-by-step Hands-on Exercises (40 – 45 minutes)

1. How to access Microsoft Dynamics CRM systems and create your own account (5-10 minutes)
2. Basic features in Microsoft Dynamics CRM Online and sales process management (15 minutes)
3. Security and auditing control in Microsoft Dynamics CRM (15 minutes)

II. Reading Materials before the Class

A. Required Reading

1. Students are required to read the following book about business process management, supply chain management (Chapter 8, pp.290-300), and IT-driven customer relationship management (Chapter 9, pp.316-331).

Paige Baltzan and Amy Philips, *Business Driven Information Systems*, 2nd Edition, McGraw-Hill Irwin, 2009, ISBN 978-0-07-33763-8

http://highered.mcgraw-hill.com/sites/0073195588/student_view0/

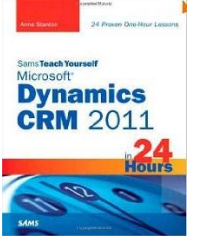
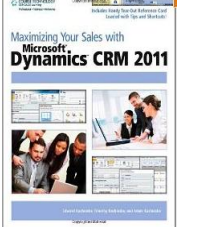
2. Read the first chapter of the following book and understand the features of Microsoft Dynamics CRM: Marc J. Wolenik, Damian Sinay, and Rajya Vardhan Bhaiya, *Microsoft Dynamics CRM 2011 Unleashed*,

B. Optional Reading

You can browse the Internet to view the following books, video clips, or articles but it is not required.

B1. Books

<p>1. Mike Snyder, Jim Steger, Brendan Landers, <i>Microsoft Dynamics CRM 2011 Step by Step</i>, Microsoft Press, January 2011, ISBN-13: 9780735648906, (450 pages)</p>	
<p>2. Mike Snyder, Jim Steger, and Kristie Reid, <i>Working with Microsoft Dynamics CRM 2011</i>, ISBN-13: 9780735648128 (624 pages)</p>	
<p>3. Marc J. Wolenik, Damian Sinay, and Rajya Vardhan Bhaiya, <i>Microsoft Dynamics CRM 2011 Unleashed</i>,</p>	
<p>4. Matthew Wittemann and Geoff Ables, <i>Microsoft Dynamics CRM 2011 Administration Bible</i>,</p>	
<p>5. Mark AuCoin, <i>Microsoft Dynamics CRM 2011: Dashboards Cookbook</i></p>	
<p>6. Edward Kachinske, Timothy Kachinske, and Adam Kachinske <i>Microsoft Dynamics CRM Online 2011 Quick Reference</i>,</p>	

<p>7. Anne Stanton, Sams Teach Yourself Microsoft Dynamics CRM 2011 in 24 Hours, January 2012, ISBN-13: 978-0672335372</p>	
<p>8. Edward Kachinske, Timothy Kachinske, and Adam Kachinske, <i>Maximizing Your Sales with Microsoft Dynamics CRM 2011</i></p>	

B.2 Video

1. Sales automations:
<http://crm.dynamics.com/demos/salesautomation/default.html>
2. Customer services:
<http://crm.dynamics.com/demos/customerservice/default.html>

B.3 Others (online)

1. George Doubinski and Ed Price, *How to Install Microsoft Dynamics CRM 2011*, Microsoft TechNet
<http://social.technet.microsoft.com/wiki/contents/articles/3176.how-to-install-microsoft-dynamics-crm-2011.aspx>

III. Materials Used during the Class

A. PowerPoint Slides

B. Step-by-Step Hands-on Exercises

B.1 How to Access Microsoft Dynamics CRM Systems and Create your Own Account (5-10 minutes)

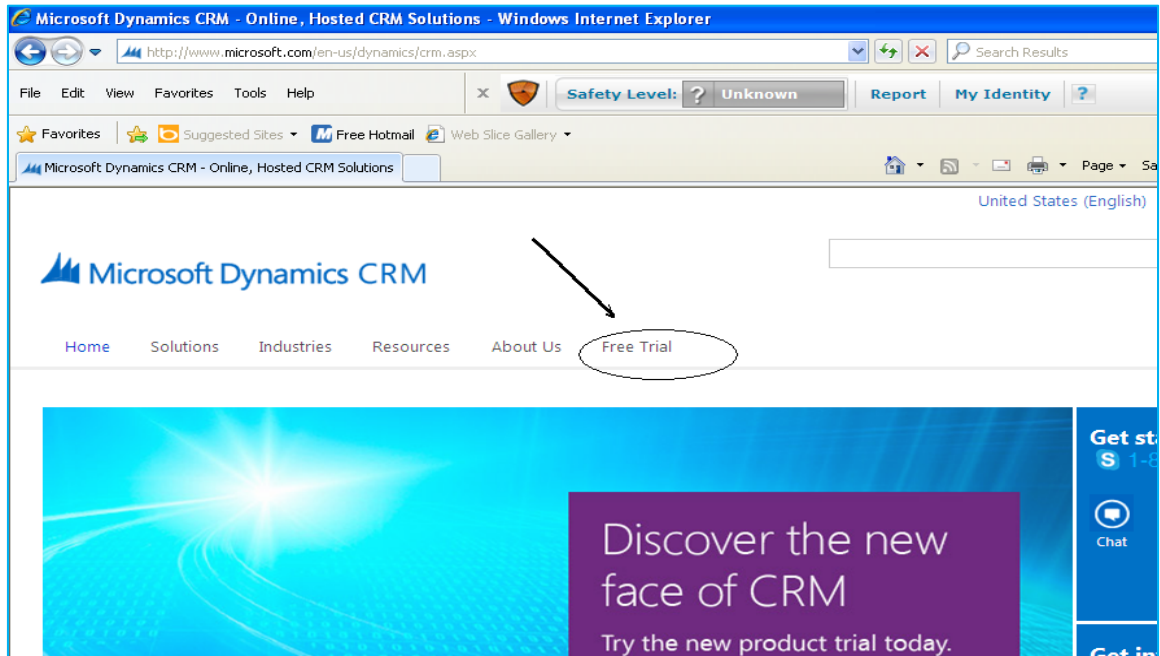
B.1.1 The Objectives of the Assignment

1. Know how to setup a free trail of Microsoft Dynamics CRM Online.
2. Know the website, user id, and password to access Microsoft Dynamics CRM Online.
3. Know how to contact DYNAA (dynaa@microsoft.com) for setting up a one-semester account.

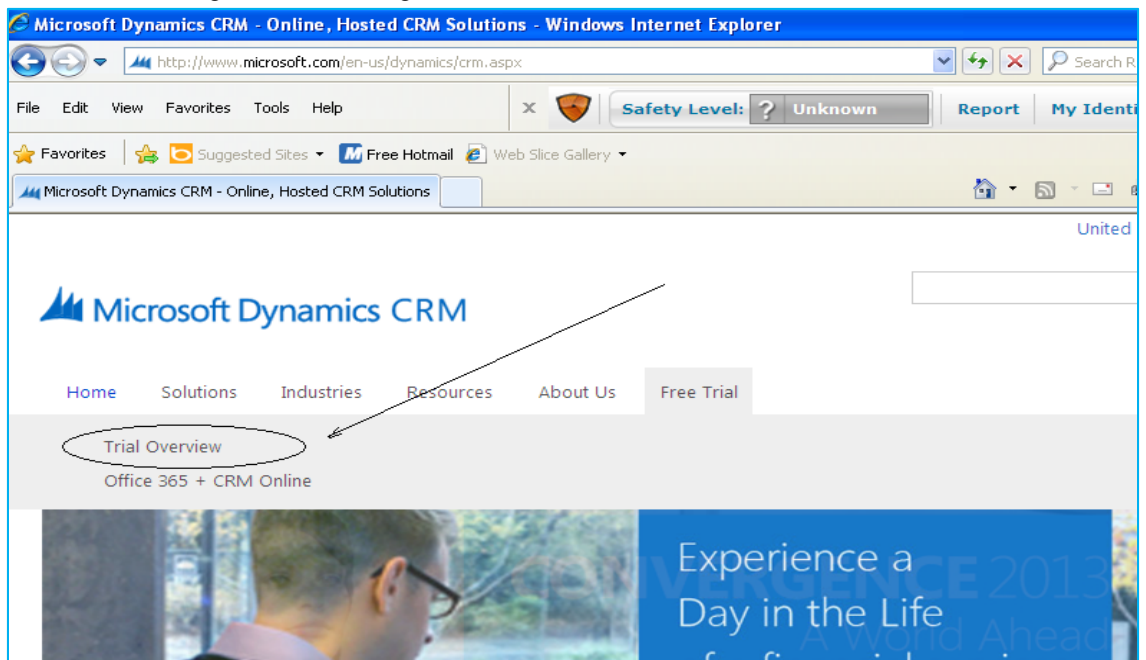
B.1.2 Setup Microsoft Dynamics CRM (Free Trail for 30 days)

1. Make sure that the computer has an active Internet connection and ensure that you use Internet Explorer to access Microsoft Dynamics CRM.

2. Apply a 30-day free trial from the following website: <http://crm.dynamics.com>. You will see the following screen:



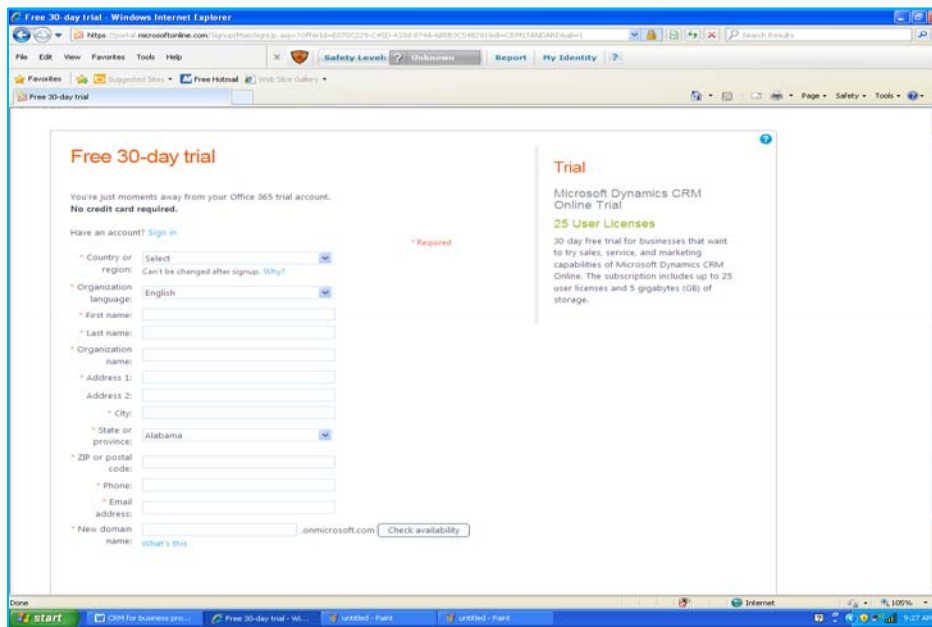
3. Click Free Trail to go to the following screen:



4. Click Trial Overview, you will see the following screen:



5. Click **Start your CRM trial** in the above screen to go the following screen:



6. Filling out the form above and make sure that you remember your user id and password. After filling out the form and submit it, you may receive the following screen:

Don't lose access to your account

If you forget your password, we will use this information to help you reset your password and gain access to your Office 365 account. [Learn more about resetting your own password](#)

Country or region code:

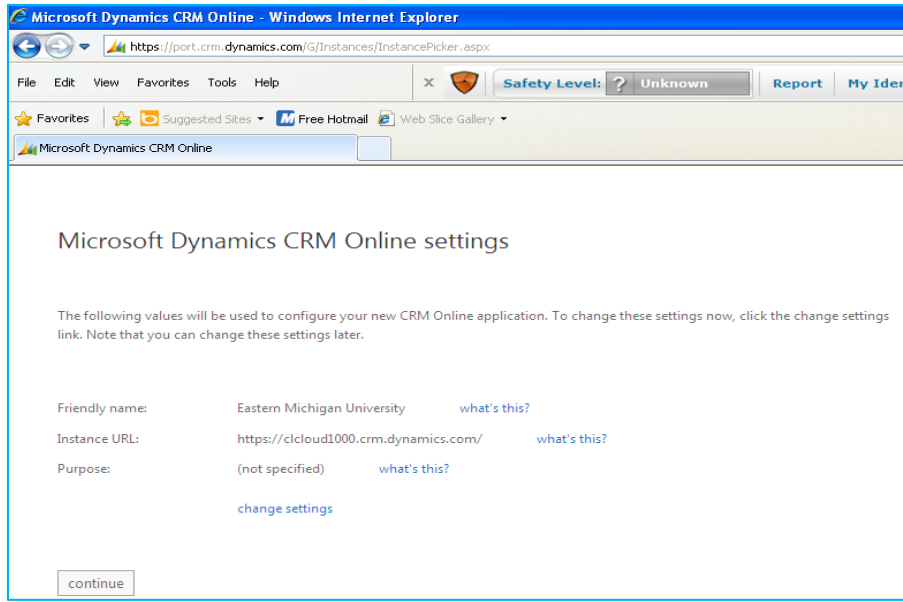
Mobile phone number:

Email address:
Don't use your Office 365 email address.

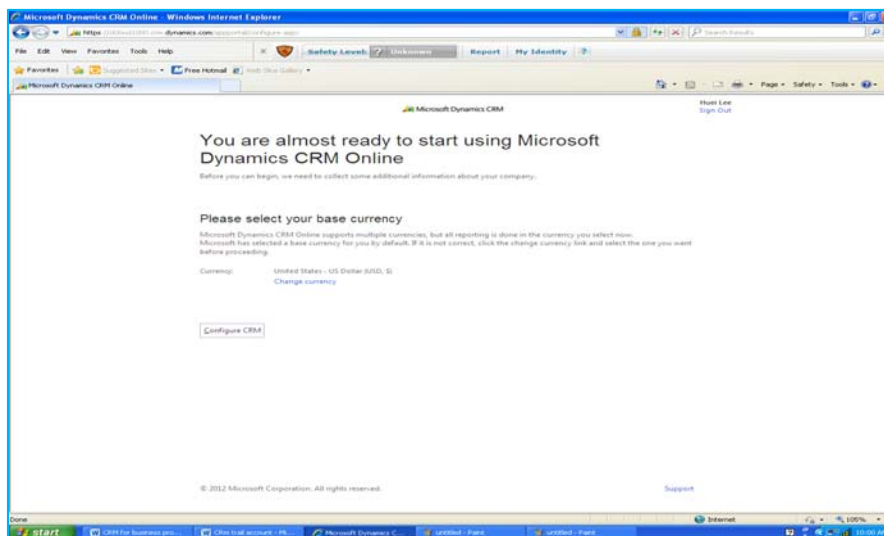
7. Enter your phone number (It does not have to be a mobile phone number. Any telephone will be fine) and you will receive the follow screen:

The screenshot shows the Microsoft Dynamics CRM Admin Home Page. The browser title is "Admin Home Page - Windows Internet Explorer". The address bar shows the URL: <https://port1.microsoftonline.com/admin/default.aspx?Action=Default&ActionName=Home&OfferId=4079c229-c49d-433d-8746-6859c348291&app=6369>. The page features a navigation menu on the left with categories: Setup, Management, Subscriptions, and Support. The main content area is titled "Start here tasks" and includes a list of five numbered steps for setting up the CRM app. Below this are sections for "Admin shortcuts", "Microsoft Dynamics", and "Community". The top right corner shows the user's name "Huei Lee" and a "Sign out" link. The bottom of the page displays the Microsoft logo and copyright information for 2013.

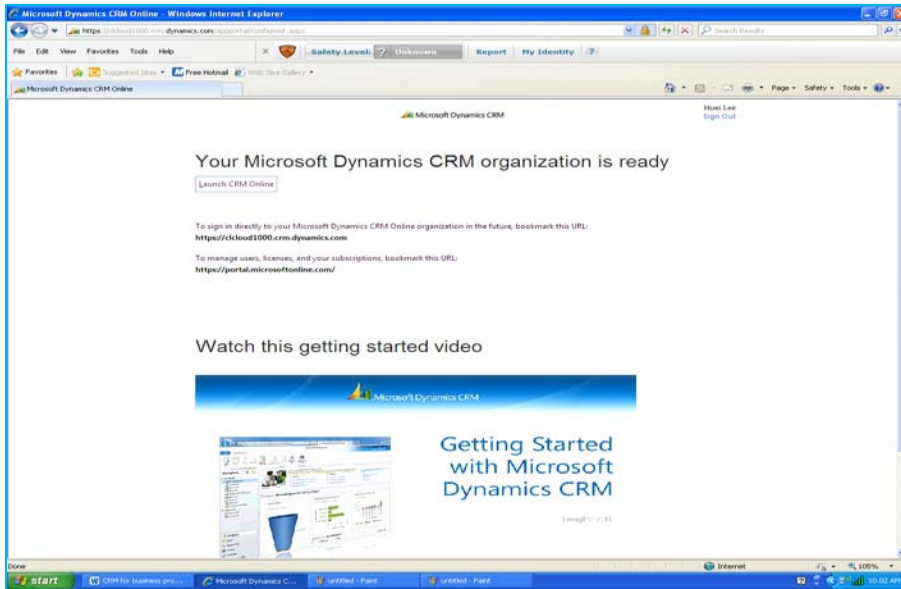
8. Click **CRM** at the top of the page to use your new CRM app. You will see the following screen:



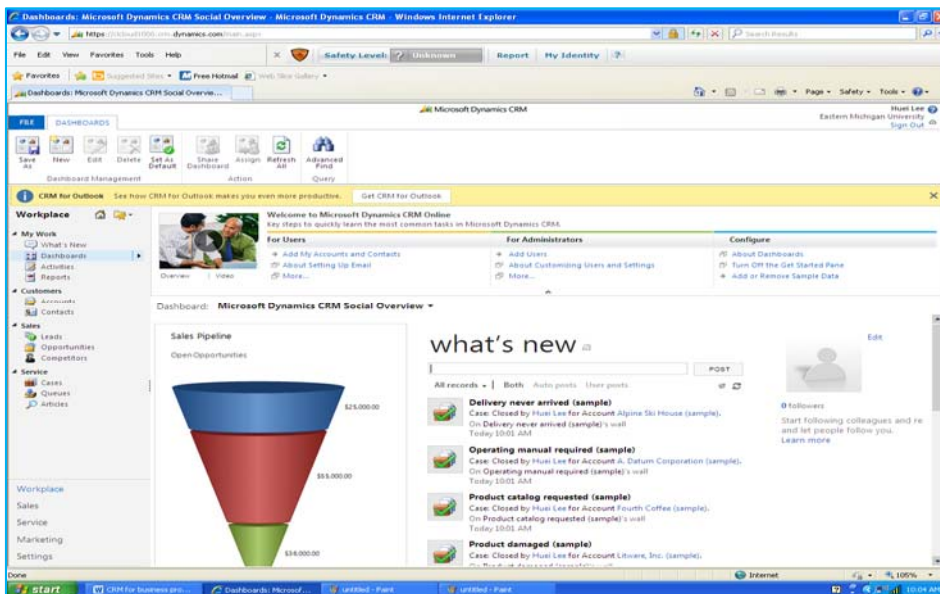
9. Make sure that you remember the URL in the above screen. You can do a screenshot and put it into a safe place. Click “continue” button to continue.



10. Select your base currency. If you use US dollars, just click “Continue CRM” and you will see the following screen.



11. Your process is finished. Click “Launch CRM Online” to continue. You will see the following screen.



If you can see the screen, your CRM setup is finished. Next time you will go to the Internet Explorer and start your CRM Online.

B.2 Basic Features in Microsoft Dynamics CRM Online & Sales Process Management (15 minutes)

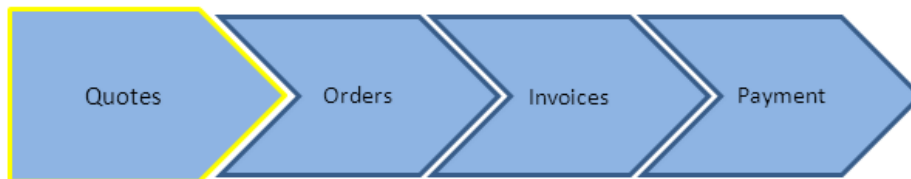
B.2.1 The Objectives of the Assignment

1. Understand basic features of Microsoft Dynamics CRM Online
2. Understand the Sales Process Management

3. Explain the concept of the business process management in Microsoft Dynamics CRM. It uses the example of business processes in sales module. The sales module includes the following processes:



Other assignments (Not in this module) include other business process management:

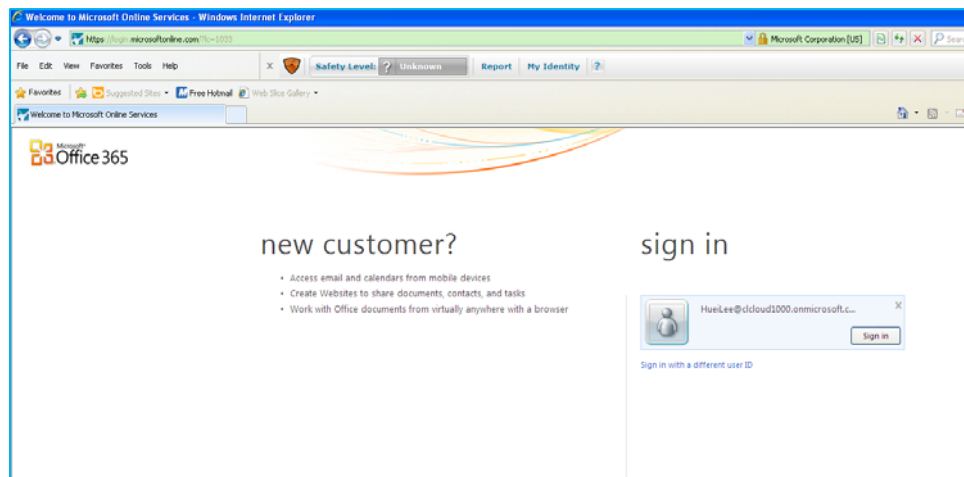


B.2.2 Step-by-step Exercises

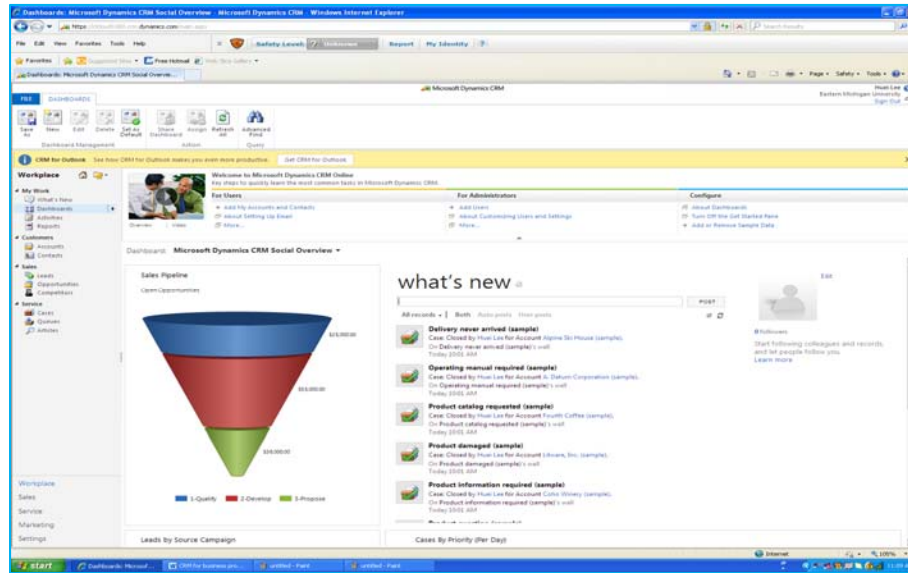
1. Use Internet Explorer to access your own URL (For example, I will use the following URL to access my CRM online:

<https://clcloud1000.crm.dynamics.com>

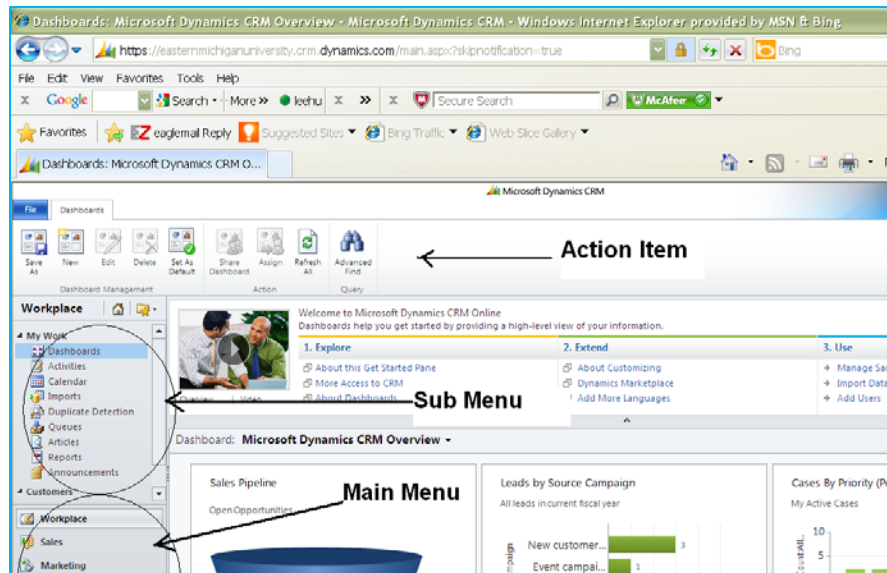
You should have your own one. Make sure you type **https** (NOT http). You will see the following screen:



2. Login with your user id and password. You will see the following screen (your screen may be a little different from mine):



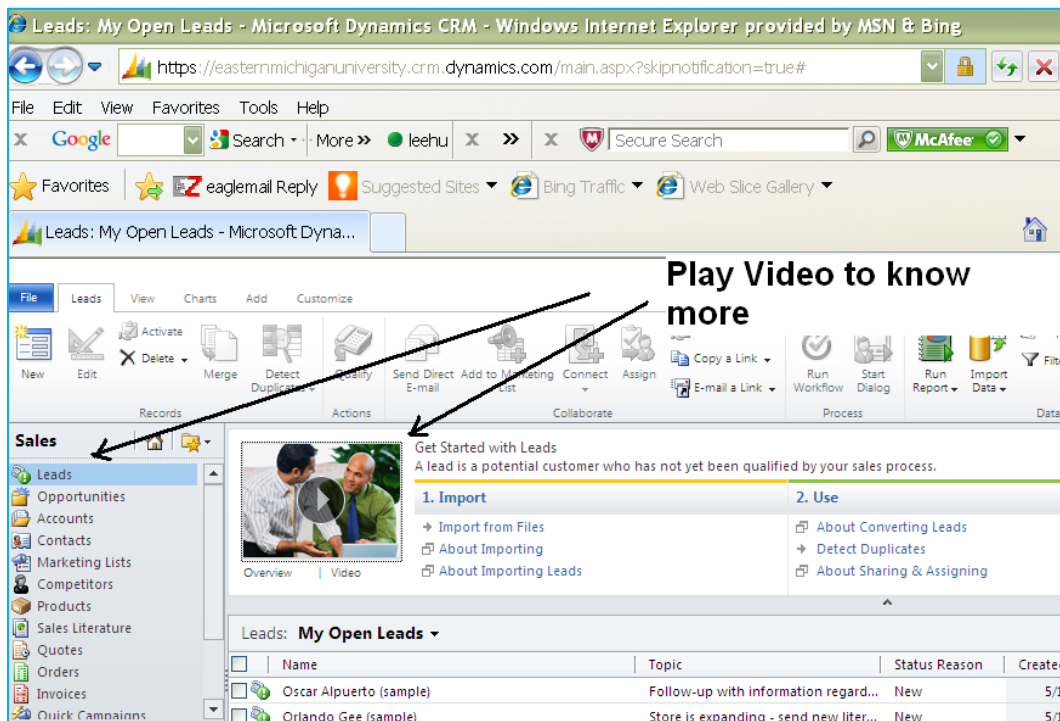
The menu structure is organized as the following picture:



Answer the following questions:

- 1) List major items in the main menu.

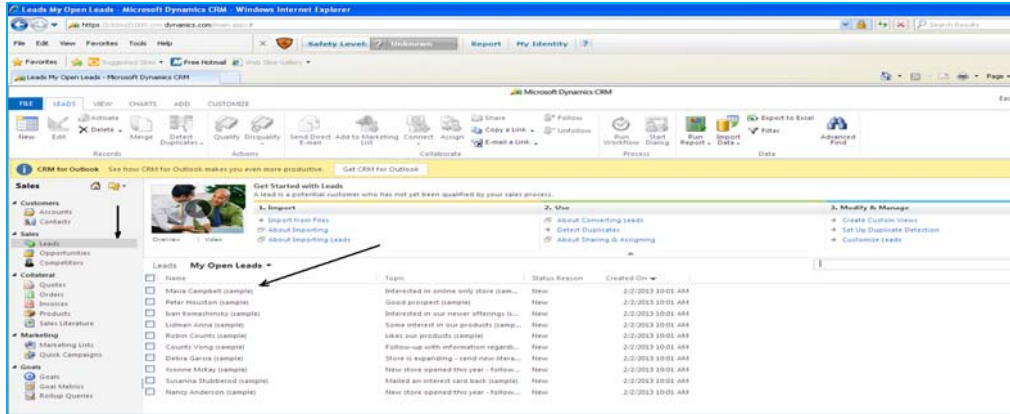
- 2) List four sub-menu items in Sales (the second items in the main menu).
- 3) List two items in the Action menu.
- 4) What is the meaning of the Leads under Sales? Play the video and provide a screen shot of your video.



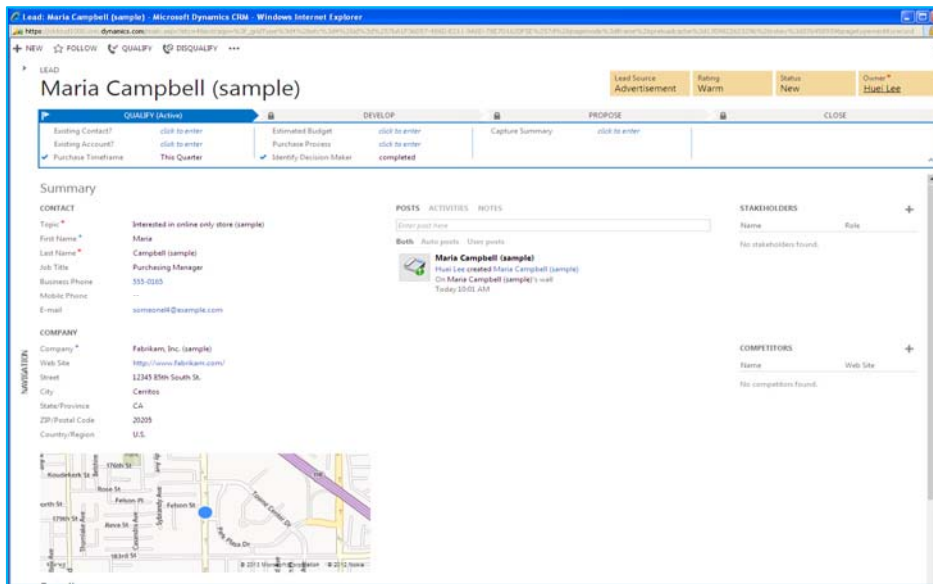
D. Sales Modules

A sales representative wants to know his potential customers and see if that they could be converted into real customers. The potential customers have already expressed their interest before and have been recorded in the CRM system as leads. The sales representative (You will act as the sales representative in the exercise) will use Dynamics CRM to do it.

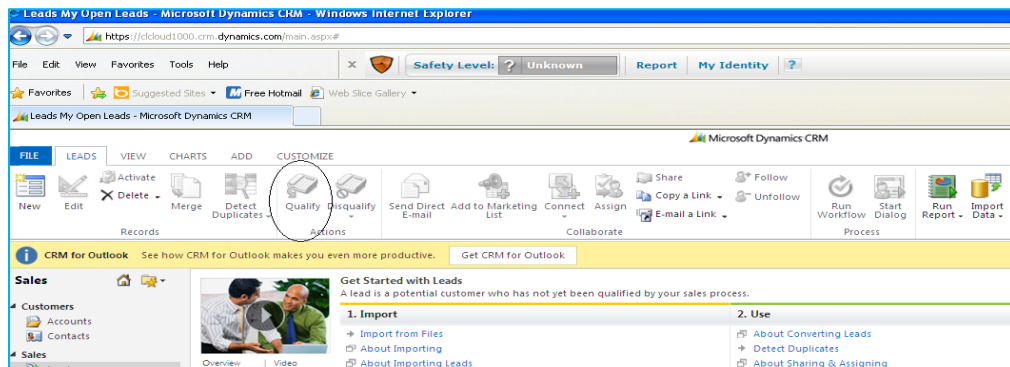
1. In the Navigation Pane, click **Sales**, and then click **Leads**.

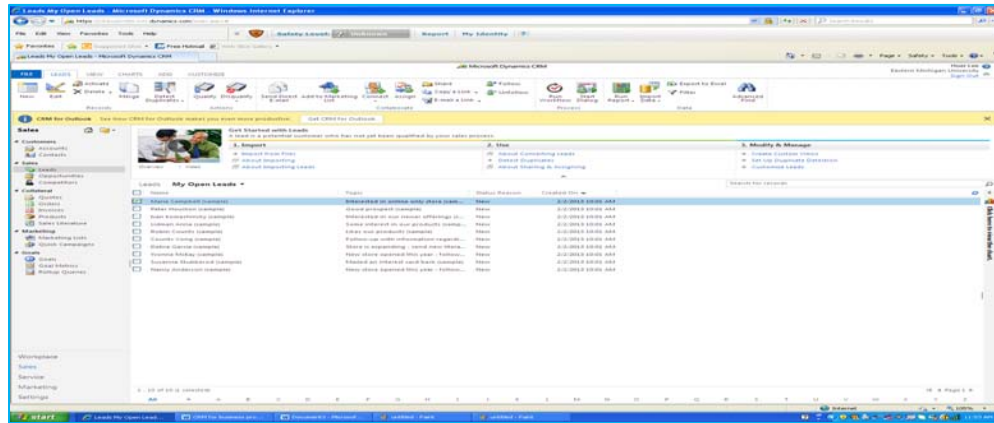


2. Leads are potential customers for your company. In the list of leads, the first one is Maria Campbell. After review her profile and contact her (See the following picture), you believe that she can be converted to an Opportunity. Close the profile.



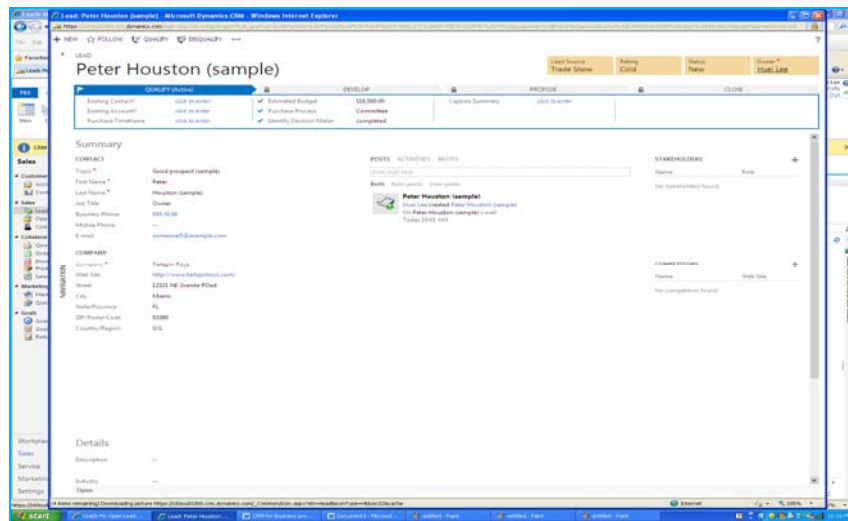
3. You are back to the previous screen. Put a check mark on Maria Campbell and click Qualify in the action menu.





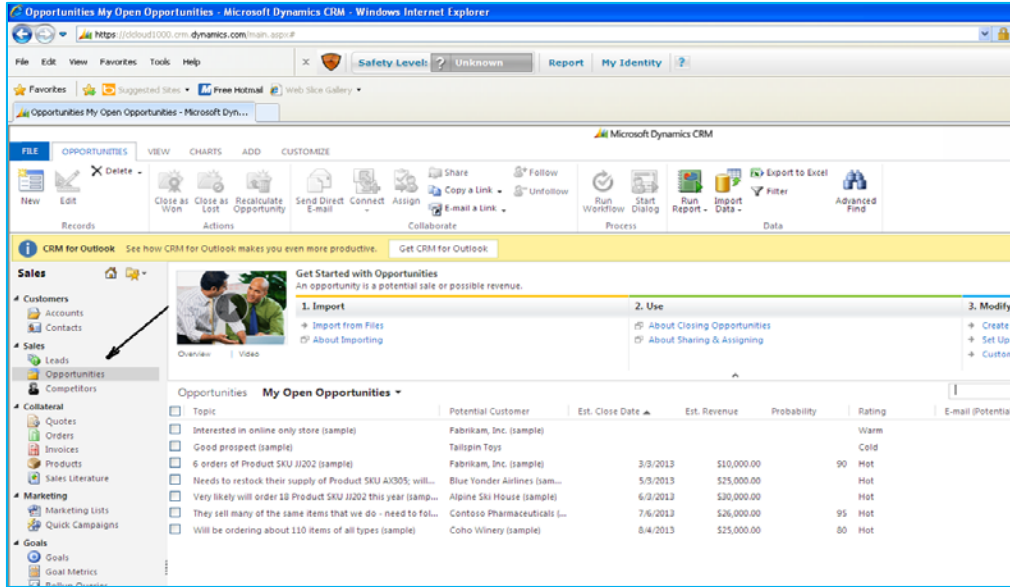
The Maria’s name is disappeared because she is moved to the list of the Opportunity.

We will review the second person, Peter Houston.



Return back to the previous menu. Check Peter Houston and Click Qualify in the action menu. You will see Peter Houston disappeared too.

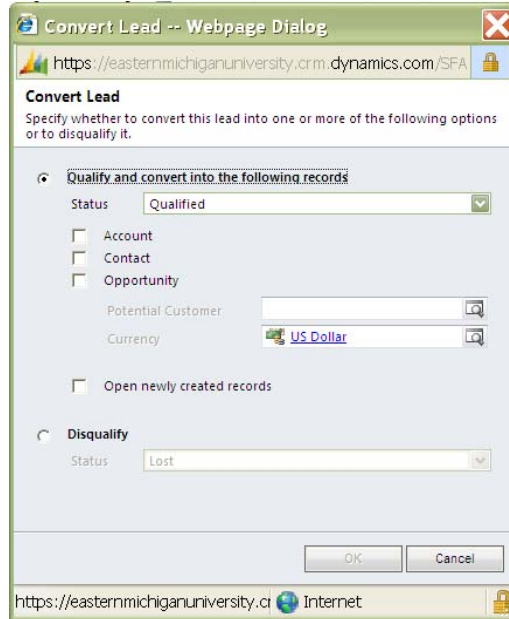
Click Opportunity on the sub-menu and you will see first two persons are Maria Campbell and Peter Houston.



Note:

In previous version, you may see the following screens when you click qualify for Lead:

You will see the Convert Lead dialog box:



In the above **Convert Lead** dialog box, select **Qualify and convert into the following records**, and then select **Opportunity**. Then in the **Potential Customer** box, you must associate either an account or contact with the lead. Click the **Lookup** button to search for an account or contact.

If you select **Opportunity**, you must select the currency (US Dollar) in which the opportunity will be calculated.

Click on the first line and you will see the information about Maria Campbell.

If she decides to make an order (purchase), we will click “Close as Won” in the Action menu. She becomes a real customer.

Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating
<input checked="" type="checkbox"/> Interested in online only store (sample)	Fabrikam, Inc. (sample)				Warm
<input type="checkbox"/> Good prospect (sample)	Tailspin Toys				Cold
<input type="checkbox"/> 6 orders of Product SKU JJ202 (sample)	Fabrikam, Inc. (sample)	3/3/2013	\$10,000.00		90 Hot
<input type="checkbox"/> Needs to restock their supply of Product SKU AX305; will...	Blue Yonder Airlines (sam...	5/3/2013	\$25,000.00		Hot
<input type="checkbox"/> Very likely will order 18 Product SKU JJ202 this year (samp...	Alpine Ski House (sample)	6/3/2013	\$30,000.00		Hot
<input type="checkbox"/> They sell many of the same items that we do - need to fol...	Contoso Pharmaceuticals (...)	7/6/2013	\$26,000.00		95 Hot
<input type="checkbox"/> Will be ordering about 110 items of all types (sample)	Coho Winery (sample)	8/4/2013	\$25,000.00		80 Hot

You will see the following screen:

Close Opportunity
Provide the following information about why this opportunity is being closed.

Status * Won Lost

Status Reason * Won

Actual Revenue * \$0.00

Close Date * 1/1/2013

Competitor

Description

OK Cancel

Enter \$2,000 in Actual Revenue and date in Close Date.

Provide a screenshot to prove that you have done the assignment.

B3. Security and Auditing Control (15 minutes)

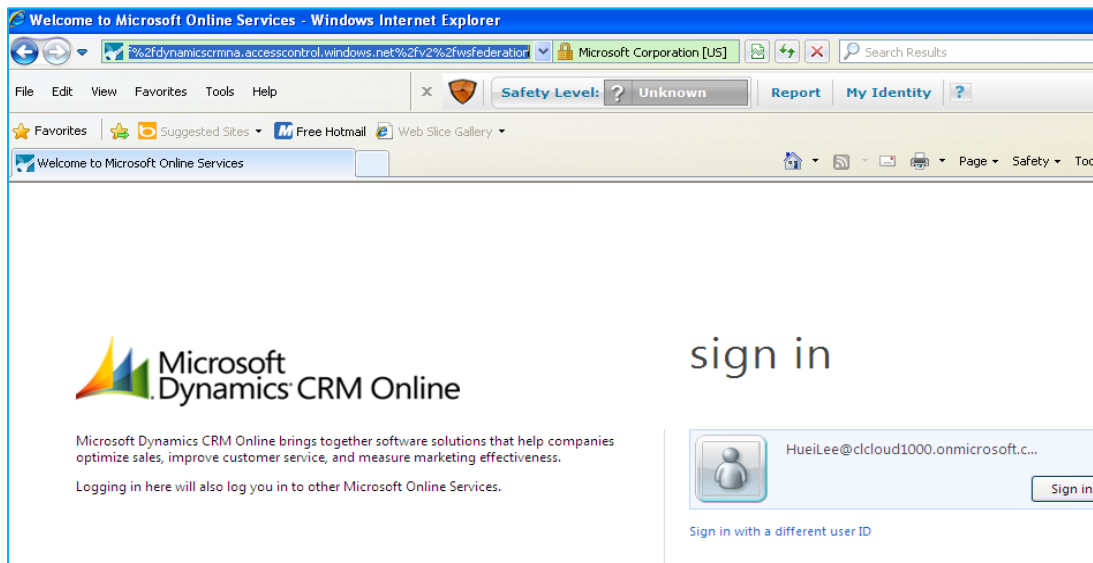
B.3.1 The Objective of the Assignment

The purpose of this assignment is to show how to create a user ID and password, as well as assign a user role and security role.

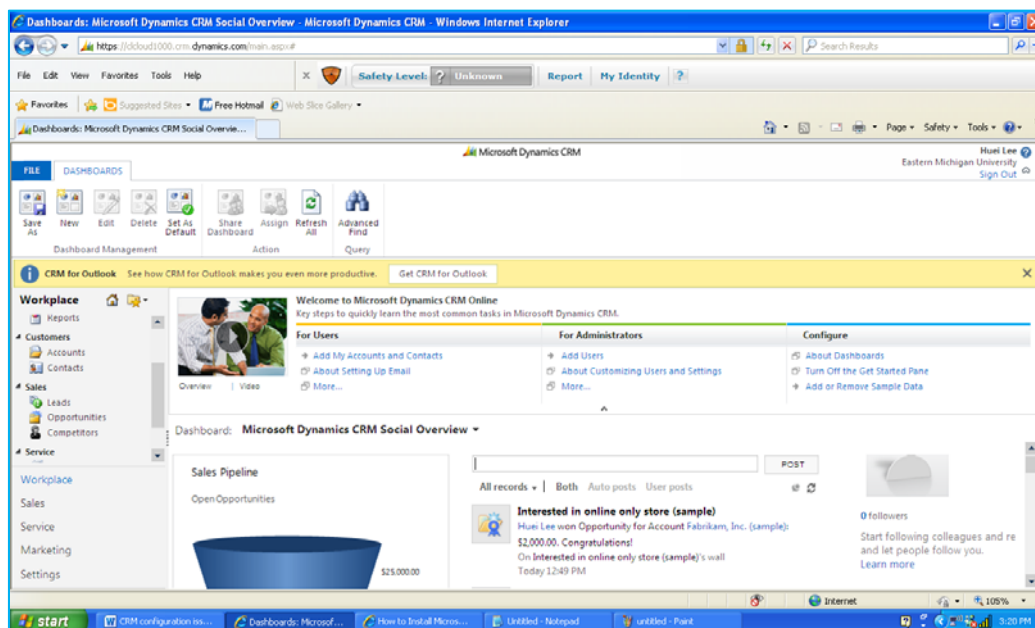
B.3.2 Assign a New User and Security Role

You will login into the server by type your assigned URL address such as

<https://clcloud1000.crm.dynamics.com>



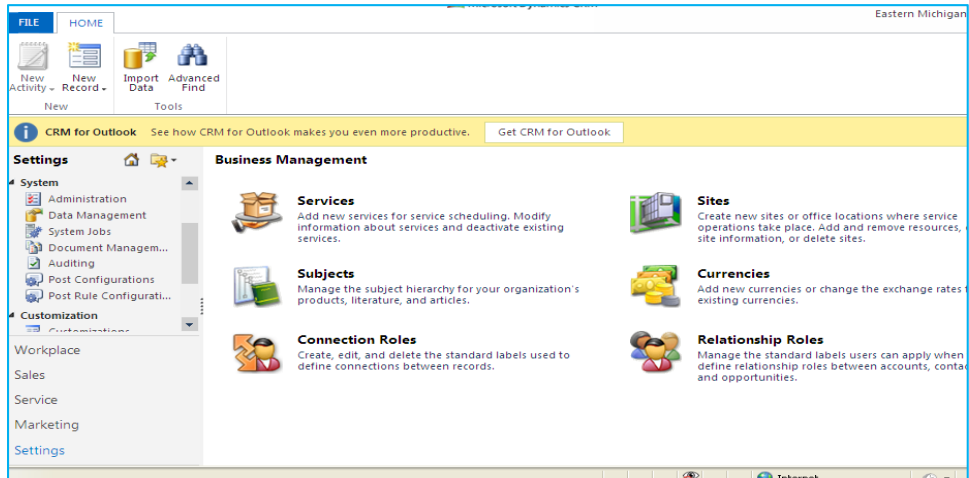
After you login into the account by typing the pre-assigned user ID and password, the following screen appears:



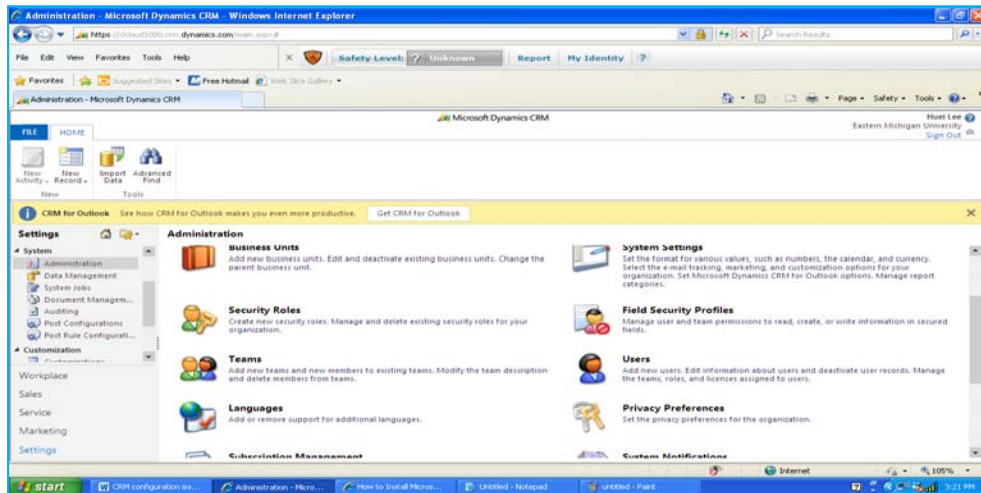
Click Settings in the main menu:



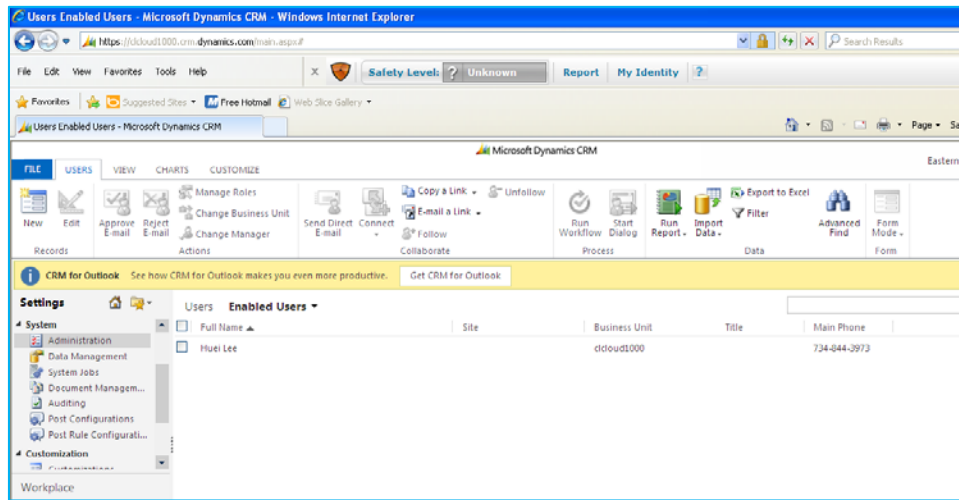
Click the Administration on the submenu:



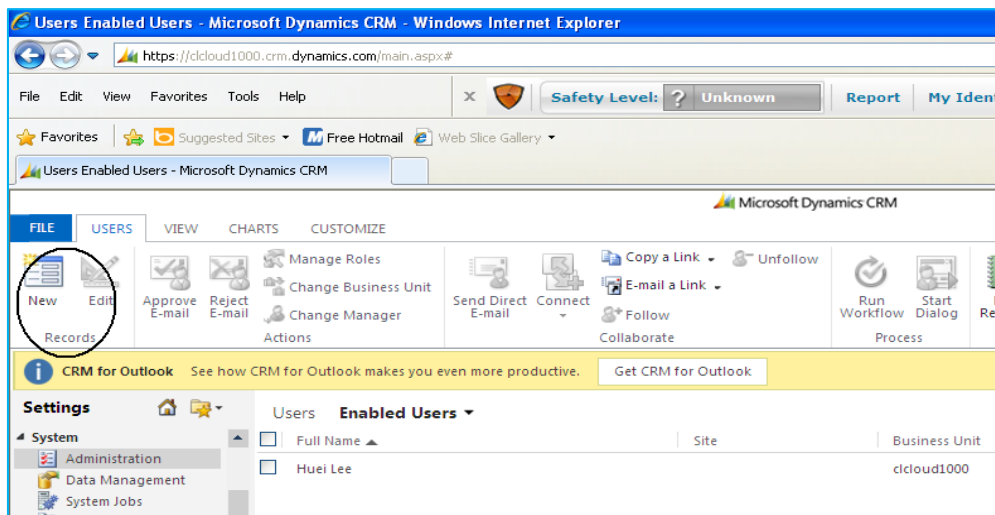
Click Administration in the submenu:



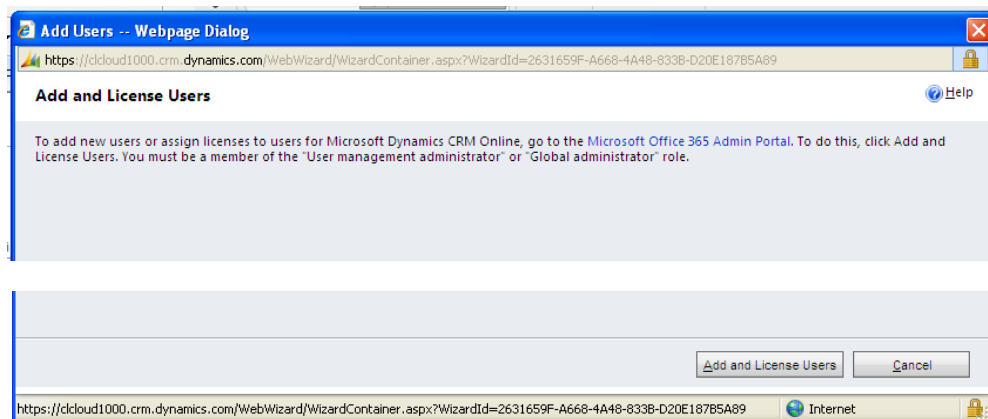
Click Users in the right panel and you will see the following screen:



Click New in the Action Menu:

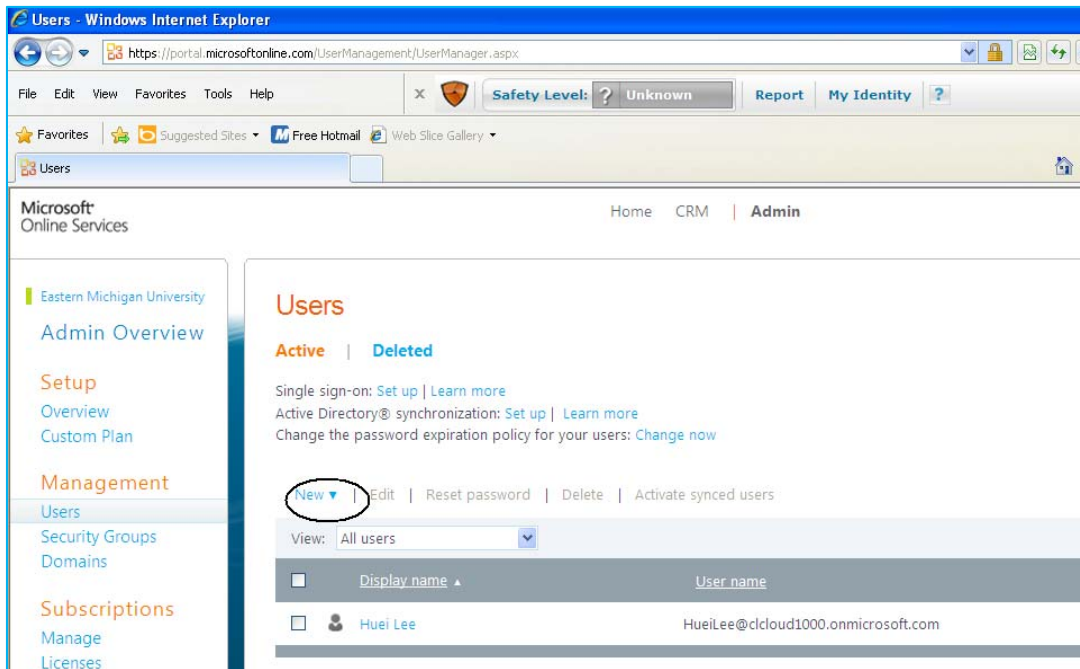


You will see the following screen:

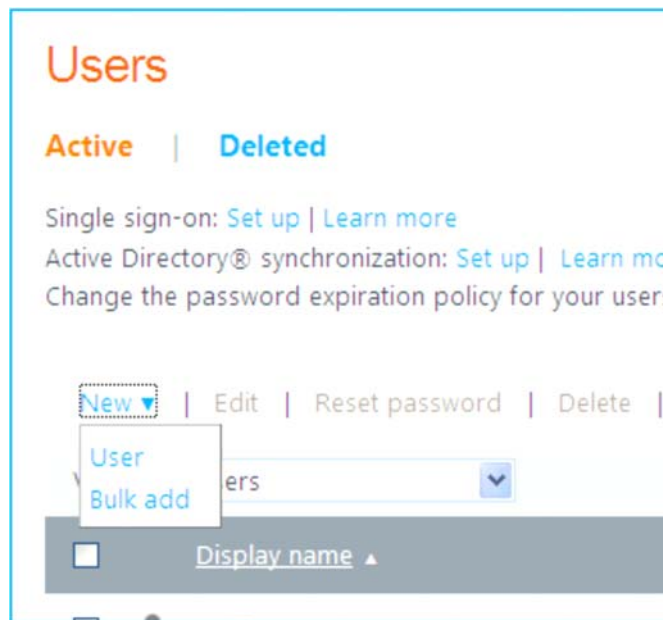


Add and License Users

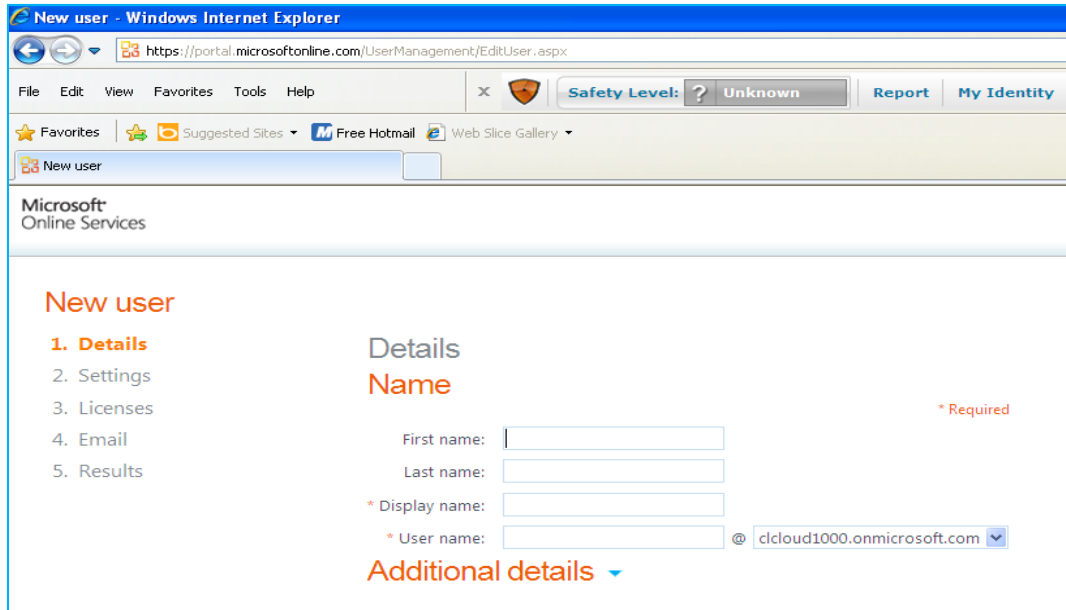
Click in the above screen. The following screen will appear:



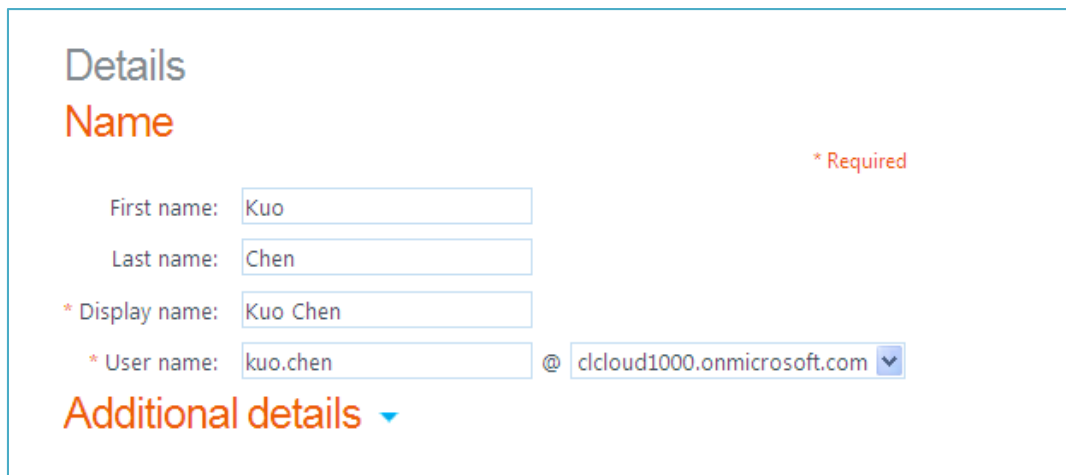
Dropdown New in the above screen, the following screen will appear:



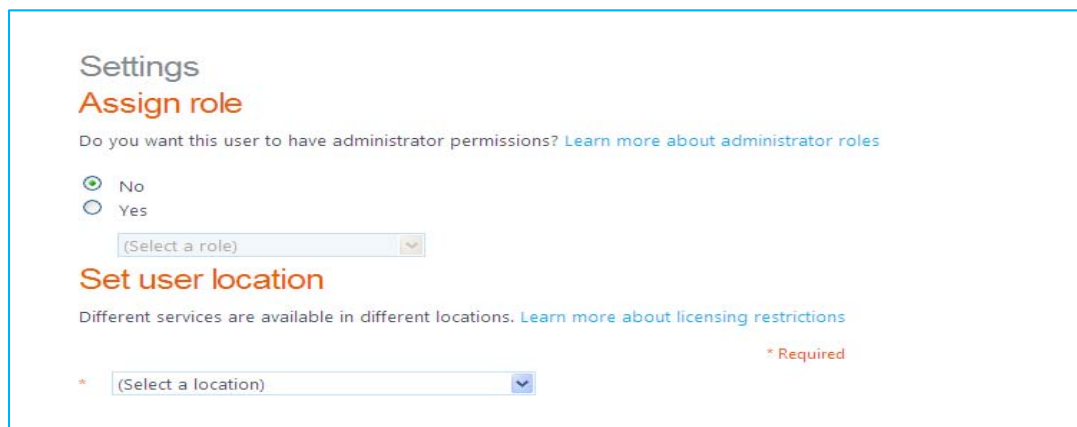
Choose User and the following screen will show:



Enter the First name, Last name, Display name and User name in the above screen such as (enter your own name)



Click Next and assign a role:



Select a role in the dropdown box.

Settings
Assign role

Do you want this user to have administrator permissions? [Learn more about administrator roles](#)

No
 Yes

(Select a role) ▼
(Select a role)
Billing administrator
Global administrator
Password administrator
Service administrator
User management administrator

Use this email to help you reset it and sign in to your Office 365

Different services are available in different locations. [Learn more about licensing restrictions](#)

* (Select a location) ▼ * Required

Question: What possible role you can select?

Select Service administrator. Enter e-mail and select the location in United States. Click next. The following screen will appear:

Assign licenses

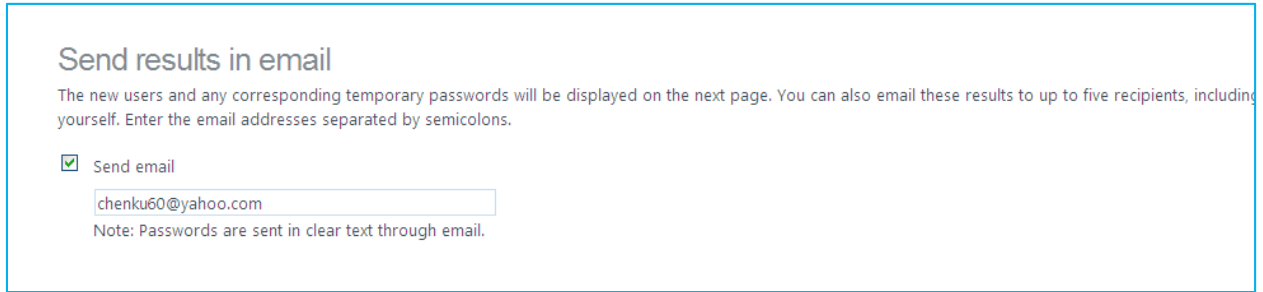
Microsoft Dynamics CRM Online 24 of 25 licenses available [Buy more licenses](#)

i CRM Security Roles
After you assign this license to the user, you must assign a security role so that the user can access your Dynamics CRM Organization. You or any other CRM administrator will be instructed to do so the next time you sign in to Dynamics CRM. [Learn more.](#)

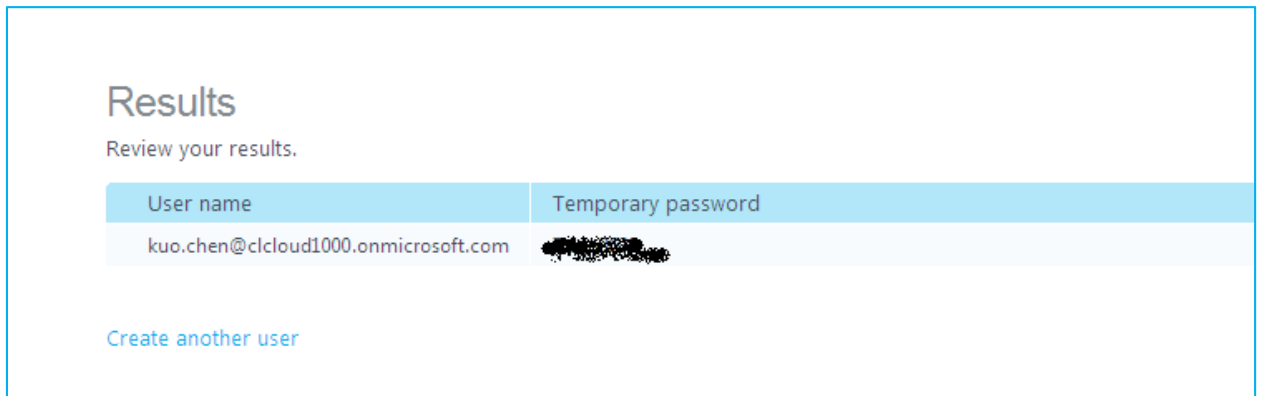
[Compare the various license options](#)

Question: What is a security role?

Click next you will see the following screen:

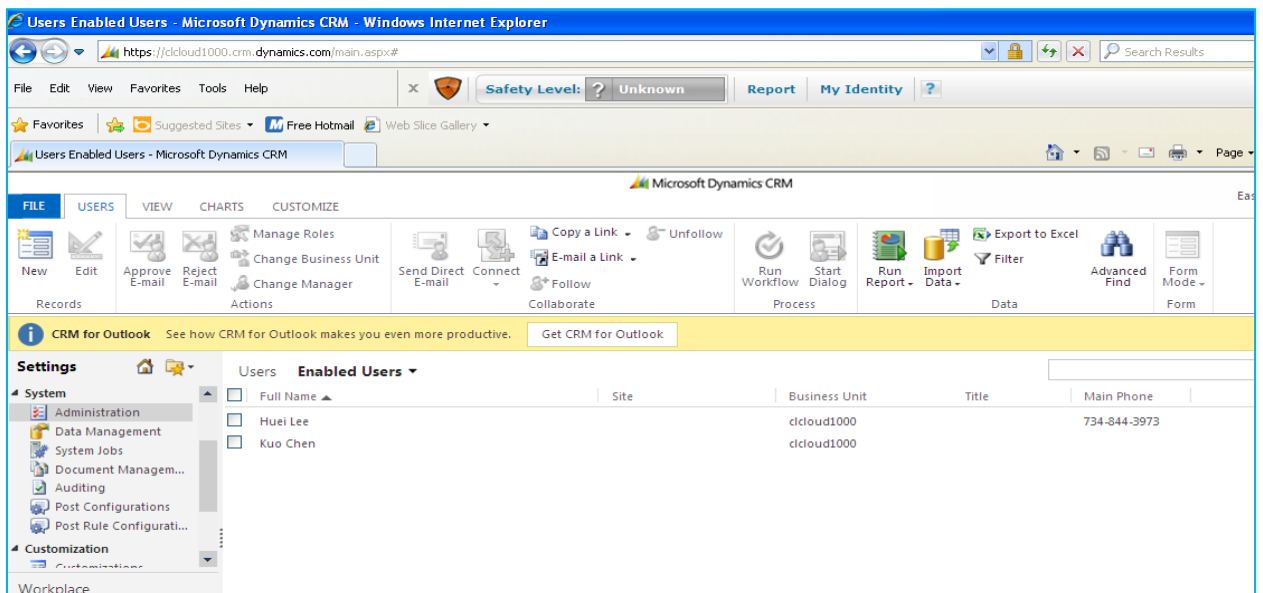


Click Create and you will see the following screen.

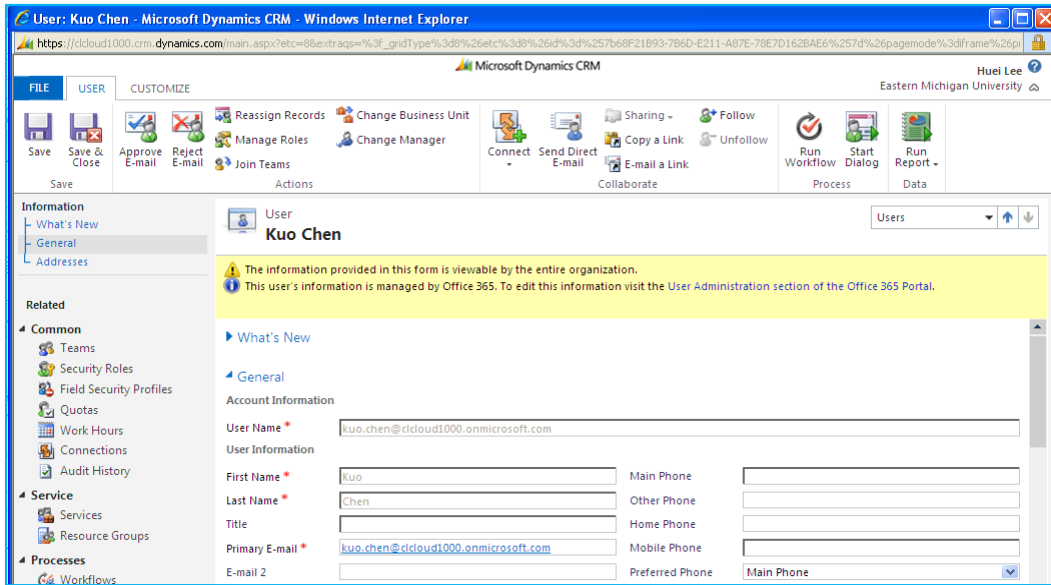


Click Finish.

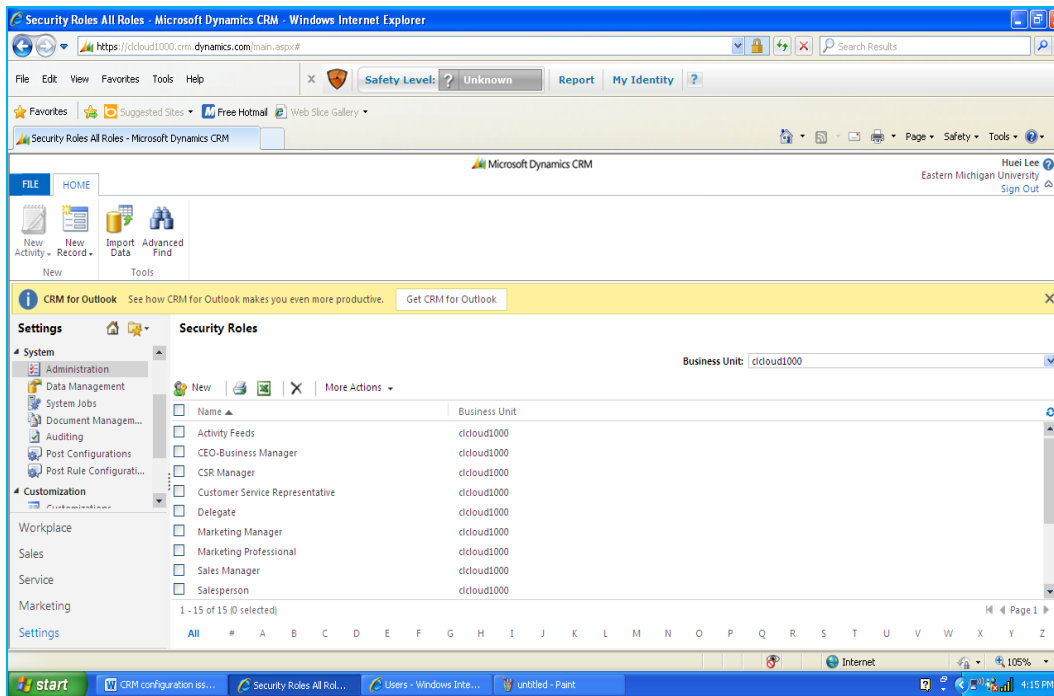
Go back the Settings -> Administration -> User. Can you see the person you just added?



Double click the new user. Can you can see the profile of the new user?



Go back to the previous screen, and click Settings -> Administration -> Security Role



Question: List 4 security roles which are not in the above screen.

Do a print-screen and paste it to the Microsoft Word.

The assignment is finished. Turn the screenshot and this assignment to the instructor.

IV. Follow-up Assignments and Assessment

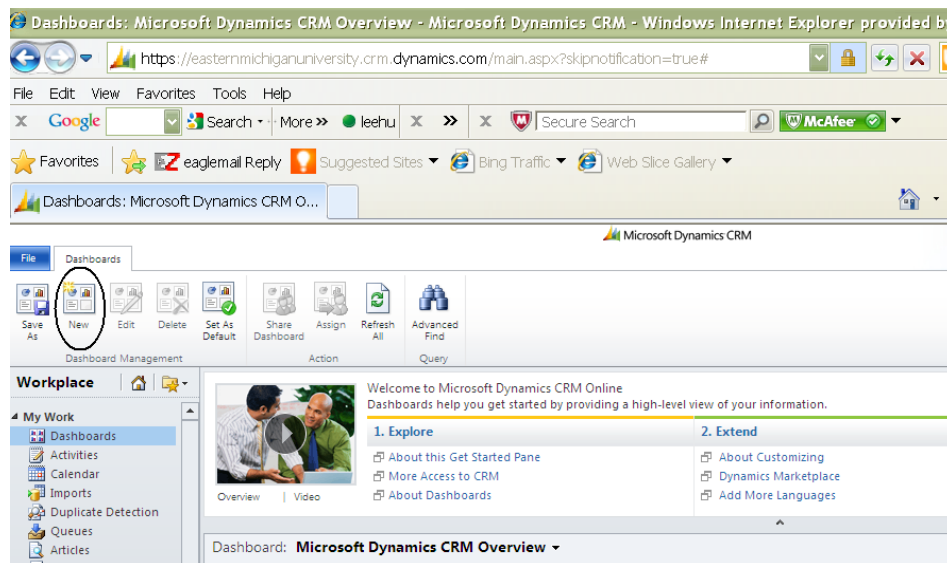
A. Follow-Up Assignments

A.1 The Objective of the Assignment

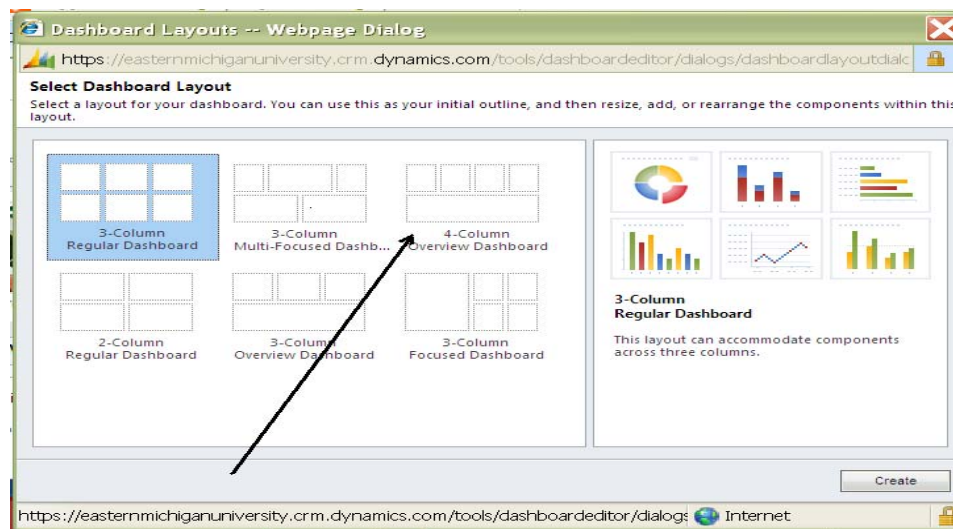
The purpose of this assignment is to access your own account and understand dashboard.

A.2 Access your account and do the following assignment:

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard Management** group, click **New**.

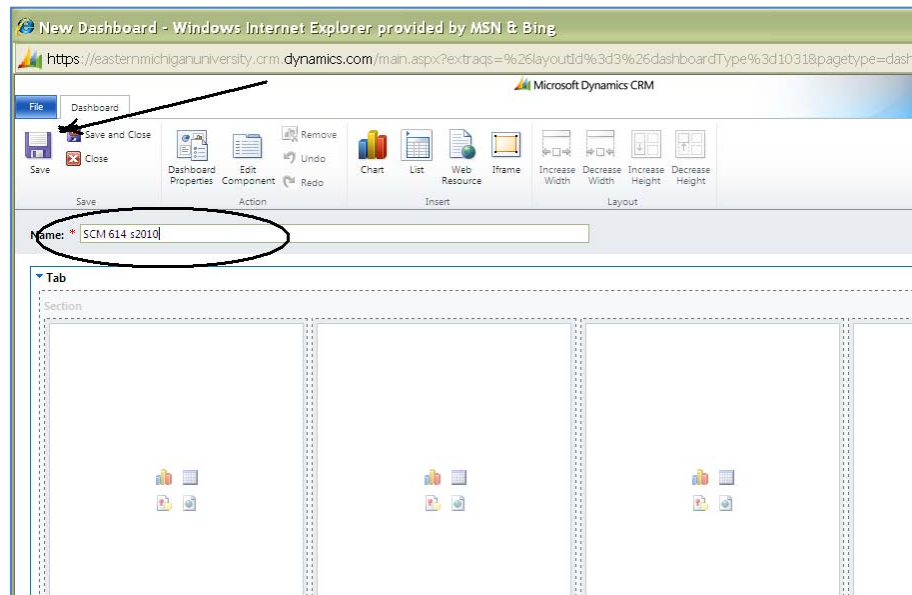


The **Dashboard Layouts** dialog box appears. The Preview area shows how the dashboard will appear with the selected layout.



3. Select a layout: **4-Column Overview Dashboard** as a starting point to design your dashboard.

The right pane shows the appearance of the new dashboard based on the layout selected in the left pane. The dashboard designer opens with empty columns based on your layout selection. Click the Create button. In the **Name** box, type a descriptive and useful name (Such as SCM 614 4B) for your dashboard. Click **Save**.



Provide a screenshot for the above screen.

A.2. Watch Video:

Watch the following video and answer the questions (The answer for each question should not be longer than one paragraph.)

A.2.1 Microsoft Dynamics CRM

<http://crm.dynamics.com/demos/salesautomation/default.html>

Answer the following questions. Prepare one screen-shot to prove that you have watched the video.

(To do this, Press the "PrintScreen/SysRq" key on the keyboard and then go to Microsoft Word and paste it)

1. Write a one-paragraph summary to describe the video clip.
2. How does CRM shorten the sales cycle for a company?

A.2.2 Answer the Following Questions and Provide One Screen-shot to Prove that You Have Watched the Video.

<http://crm.dynamics.com/demos/customerservice/default.html>

3. How does Microsoft Dynamics CRM help a company to improve operational efficiencies and contain costs?

	<u>Strongly Disagree</u>				<u>Strongly Agree</u>		
1) Microsoft Dynamics CRM Online is valuable for SCM/BPM.	1	2	3	4	5	6	7
2) Microsoft Dynamics CRM Online is valuable for sales managers to manage clients' information.	1	2	3	4	5	6	7
3) Microsoft Dynamics CRM Online is a valuable software for marketing management in general.	1	2	3	4	5	6	7
4) Microsoft Dynamics CRM Online is helpful for managers to develop a good relationship with their clients.	1	2	3	4	5	6	7
5) Microsoft Dynamics CRM Online is valuable for brand image management.	1	2	3	4	5	6	7
6) Microsoft Dynamics CRM Online is valuable for process management.	1	2	3	4	5	6	7
7) Microsoft Dynamics CRM Online is valuable for making pricing decisions.	1	2	3	4	5	6	7
8) Microsoft Dynamics CRM Online is valuable for making promotion decisions.	1	2	3	4	5	6	7
9) Microsoft Dynamics CRM Online is easy to use.	1	2	3	4	5	6	7
10) Microsoft Dynamics CRM Online can enhance my learning experience in the classroom.	1	2	3	4	5	6	7
11) Overall speaking, I find Microsoft Dynamics CRM Online interesting to use.	1	2	3	4	5	6	7

Figure 6: Full assessment questionnaire

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