## 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.

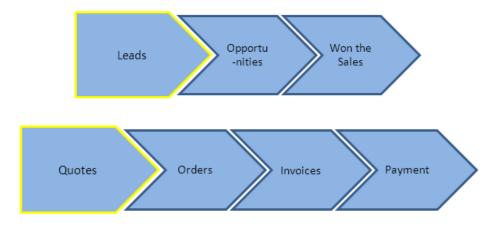


Figure 1: Business process in the sales module in Microsoft Dynamics CRM

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|-------------------------------|--|------------------|-----------|
| Find by Task ID               |  |                  |           |
| ▼   View: All Security Tasks; | by Task ID                             |                  | \$        |
| Task ID                       | Name                                   | Category         |           |
| ADMIN_FIN_003*                | Set up financial currencies            | Financial        | ~         |
| ADMIN_FIN_004*                | Set up Bank Reconciliation             | Financial        | _         |
| ADMIN_FIN_005*                | General financial administration       | Financial        |           |
| ADMIN_FIN_006*                | Period-end financial routines          | Financial        |           |
| ADMIN_FIN_007*                | Currency revaluation                   | Financial        |           |
| ADMIN_FIN_008*                | Import from ADP                        | Financial        |           |
| ADMIN_FIN_009*                | Financial tables                       | Financial        |           |
| ADMIN_FIN_CF01*               | Set up Cash Flow Management            | Financial        |           |
| ADMIN_FIN_FA01*               | Set up Fixed Asset module              | Financial        |           |
| ADMIN_FIN_FA02*               | Fixed Assets period end routines       | Financial        |           |
| ADMIN_FIN_FA03*               | Fixed Assets maintenance and utilities | Financial        |           |
| ADMIN_FIN_FA05*               | Fixed Assets tables                    | Financial        | ~         |

Figure 2: Security tasks in Microsoft Dynamics GP

| File Edit Tools Help              |                                       | sa Fabrikam, Inc. 4) | 12/20 |
|-----------------------------------|---------------------------------------|----------------------|-------|
| Find by Role ID                   |                                       |                      |       |
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| Role ID                           | Name                                  |                      |       |
| PM MANAGER*                       | Preventive Maintenance Manager        |                      | ~     |
| PM STAKEHOLDER*                   | Preventive Maintenance Stakeholder    |                      |       |
| POWERUSER                         | POWERUSER                             |                      | _     |
| PURCHASING AGENT*                 | Purchasing Agent                      |                      |       |
| PURCHASING MANAGER*               | Purchasing Manager                    |                      |       |
| RED CLERK*                        | Revenue and Expense Deferrals Clerk   |                      |       |
| RED MANAGER*                      | Revenue and Expense Deferrals manager |                      |       |
| RT AGENT*                         | Returns Management Agent              |                      |       |
| RT MANAGER*                       | Returns Management Administrator      |                      |       |
| RT STAKEHOLDER*                   | Returns Mangement Stakeholder         |                      |       |
| SHIPPING AND RECEIVING*           | Shipping and Receiving                |                      |       |
| WAREHOUSE MANAGER*                | Warehouse Manager                     |                      | ~     |

Figure 3: Security roles in Microsoft Dynamics GP

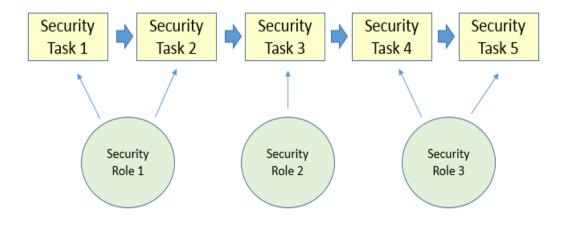


Figure 4: Security tasks/roles assignment

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: <u>http://crm.dynamics.com</u>,

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 (<u>http://50.241.208.85</u>). 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 Dy | namics CRM i    | is interesting to m  | e.                  | _                    |
|--|--------------|-----------------|----------------------|---------------------|----------------------|
|  | 1            | 2               | 3                    | 4                   | 5                    |
|  | Not at all   |                 |                      |                     | Completely Agree     |
| 2.   | Microsoft Dy | namics CRM i    | s more interesting   | g than Microsoft D  | Dynamics GP.         |
|  | 1            | 2               | 3                    | 4                   | 5                    |
|  | Not at all   |                 |                      |                     | Completely Agree     |
| 3.   | The assignme | ent for Microso | oft Dynamics CRN     | A is helpful for me | e to understand CRM. |
|  | 1            | 2               | 3                    | 4                   | 5                    |
|  | Not at all   |                 |                      |                     | Completely Agree     |
| 4.   | The remote a | ccess method i  | s better than the la | ab 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** 

| Question   | Means (µ) | <b>Standard</b><br><b>Deviation</b> (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<br>more interesting than Microsoft<br>Dynamics GP.            | 3.86      | 1.06                                    | 1   | 5   | 4      | 4    |
| 3. The assignment for<br>Microsoft Dynamics CRM is<br>helpful for me to understand<br>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<br>access to Microsoft Dynamics<br>CRM is appropriate.         | 3.68      | 0.82                                    | 2   | 5   | 4      | 4    |

#### Table 1: Assessment results

## 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

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

| 7. | Anne Stanton, Sams Teach Yourself Microsoft Dynamics CRM 2011 in 24 Hours,<br>January 2012, ISBN-13: 978-0672335372 | An energy (2) An |
|----|---|--|
| 8. | Edward Kachinske, Timothy Kachinske, and Adam Kachinske, Maximizing Your Sales with Microsoft Dynamics CRM 2011     | Constraint       Constraint         Maximuchan Your Sales with         Dynamics CRM 2011         Image: Constraint Constraint         Image: Constraint <td< td=""></td<>   |

#### **B.2** Video

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

#### **B.3 Others (online)**

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

## **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)

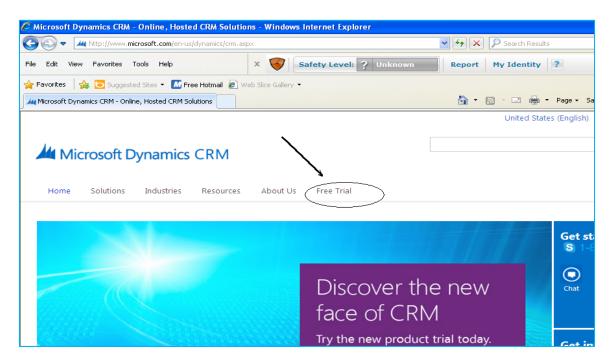
#### **B.1.1 The Objectives of the Assignment**

- 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.

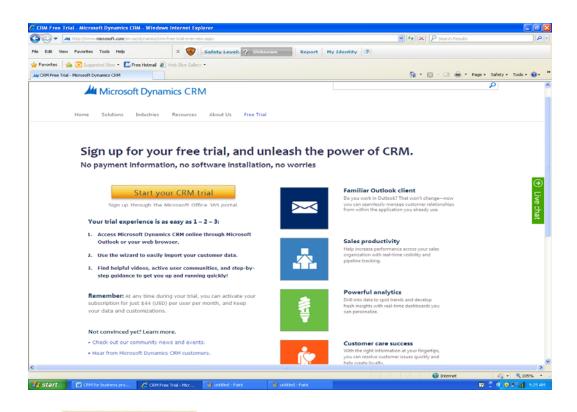
2. Apply a 30-day free trial from the following website: <u>http://crm.dynamics.com</u>. You will see the following screen:



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

| C Microsoft Dynamics CRM - Online, Hosted CRM Solution | ons - Windows Internet Explorer |                  |
|--|---------------------------------|------------------|
| - Multip://www.microsoft.com/en-us/dynamics/crm.as     | spx                             | 💌 🔸 🗙 🔎 Search R |
| File Edit View Favorites Tools Help                    | X 😽 Safety Level: ? Unknown     | Report My Identi |
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| Microsoft Dynamics CRM - Online, Hosted CRM Solutions  |                                 | 🟠 • 🔊 · 🖃 🕯      |
| Home Solutions Industries Besources                    | About Us Free Trial             | United           |
| Trial Overview<br>Office 365 + CRM Online              |                                 |                  |
|  | Experience a<br>Day in the L    | ife Ahead        |

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



5. Click Start your CRM trial

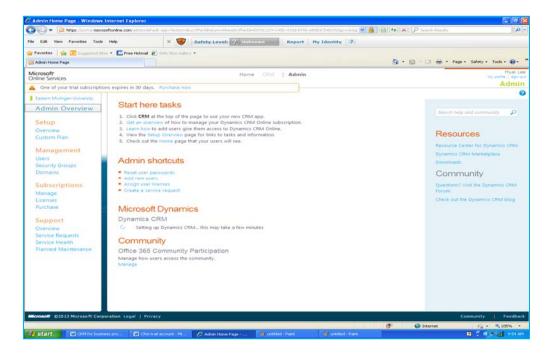
in the above screen to go the following screen:

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| You're just mom<br>No credit card | ients away from your Offic<br>required. | e 365 trial account. |                                    | Microsoft Dy<br>Online Trial | ynamics CRM                                       |                      |
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| Haive an account                  | tr sign in                              |                      | * Required                         |                              | for businesses that want                          |                      |
| * Country or                      |   |                      |                                    |                              | ice, and marketing<br>licrosoft Dynamics CRM      |                      |
|                                   | Can't be changed after sign.            | ap. Why?             |                                    |                              | cription includes up to 25                        |                      |
| Organization     language:        | English                                 |                      |                                    |                              | user licenses and 5 gigabytes (GB) of<br>storage. |                      |
| * First name:                     |   |                      |                                    | storage.                     |   |                      |
| * Last name:                      |   |                      |                                    |                              |   |                      |
| * Organization                    |   |                      |                                    |                              |   |                      |
| name:                             |   |                      |                                    |                              |   |                      |
| * Address 1:                      |   |                      |                                    |                              |   |                      |
| Address 2:                        |   |                      |                                    |                              |   |                      |
| - ⊂ity:                           |   |                      |                                    |                              |   |                      |
| * State or<br>province:           | Alabama                                 | 191                  |                                    |                              |   |                      |
| * ZIP or postal code:             |   |                      |                                    |                              |   |                      |
| * Phone:                          |   |                      |                                    |                              |   |                      |
| * Email                           |   |                      |                                    |                              |   |                      |
| address:                          |   |                      | (                                  |                              |   |                      |
| * New domain name:                | What's this                             | .onmicrosoft.c       | om Check availability              |                              |   |                      |
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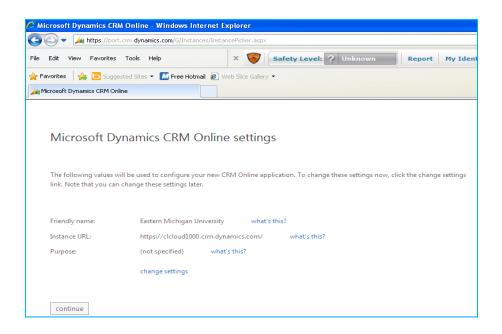
6. Filling out the form above and make sure that you remember your user id and password. After filling out the form and submit it, you may receive the following screen:

| 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:<br>Mobile phone number:  | United States   |  |  |  |  |  |  |  |
| Email address:   | clcloud1000@yahoo.com<br>Don't use your Office 365 email address. |  |  |  |  |  |  |  |
|  | First and continue  |  |  |  |  |  |  |  |
|  | Save and continue   |  |  |  |  |  |  |  |

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:



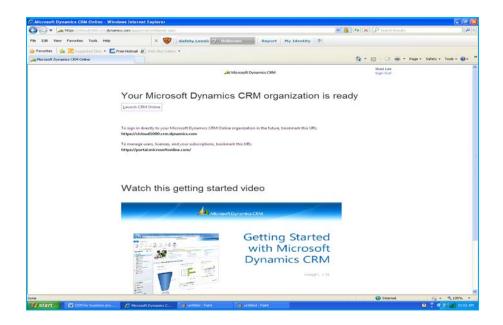
8. Click CRM at the top of the page to use your new CRM app. You will see the following screen:



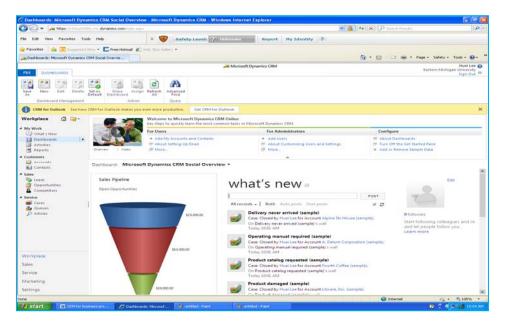
9. Make sure that you remember the URL in the above screen. You can do a screenshot and put it into a safe place. Click "continue" button to continue.

| Microsoft Dynamics CRM Online Wi    |  |                      |                        |
|-------------------------------------|--|----------------------|------------------------|
| G G + Jack Helps                    | And A CONCIDENT ALL AND A REAL   | Presentends          | P.                     |
| File Edit View Pavorites Tools Help | * 🦁 Safety Level: 🖓 Linitation Report My Identity 1  | N                    |                        |
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| Microsoft Dynamics CRM Online       |  |                      | • Safety • Tools • 😥 • |
|                                     | Jai Microsoft Dynamics CRM   | Huel Lee<br>Sign Out |                        |
|                                     | You are almost ready to start using Microso<br>Dynamics CRM Online<br>Enter you can begin, so need to called turns additional information about your company.  | oft                  |                        |
|                                     | Please select your base currency   |                      |                        |
|                                     | Microsoft Dynamics CRM Online supports multiple currencies, but all reporting is done in the currency or<br>Microsoft has referetal a base currency for you ity default. If it is not correct, click the change currency las<br>before proceeding. |                      |                        |
|                                     | Currency: Under State - US Onliar (USO, 5)<br>Change currency  |                      |                        |
|                                     | Geologies CRM  |                      |                        |
|                                     |  |                      |                        |
|                                     | © 2012 Microsoft Corporation. All rights reserved.   | Support              |                        |
| 27-0                                |  | 🚱 Internet           | Fa . \$100% .          |
| Start W Citthe barren pro-          | 😰 Chin that account - H 🖉 Photosoft Dynamics C   |                      | B 7 6 5 4 1000         |

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)

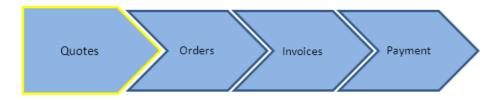
#### **B.2.1** The Objectives of the Assignment

- 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**

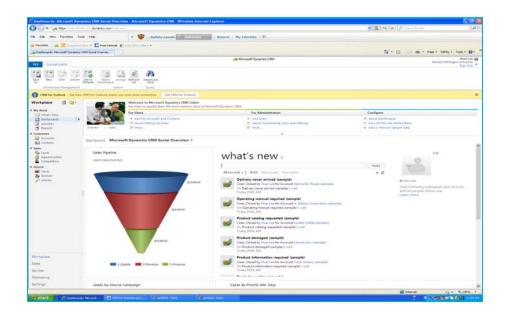
1. Use Internet Explorer to access your own URL (For example, I will use the following URL to access my CRM online:

https://clcloud1000.crm.dynamics.com

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

| 🕒 🕘 🔹 🌄 Mitps://login.microsoftoniine.com/?ic=1 |  | Microsoft Corporation (US) 🕒 🐈 🗙 🖓 Search  |
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| File Edit View Favorites Tools Help             | X 😻 Safety Level: ? Unknown Report My Identity ?   |  |
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| Welcome to Microsoft Online Services            |  | 🖞 • 🗟 - 🗖                                  |
| Coffice 365                                     |  |  |
|   | new customer?  | sign in                                    |
|   | <ul> <li>Access email and calendars from mobile devices</li> <li>Create Websites to share documents, contacts, and tasks</li> <li>Work with Office documents from virtually anywhere with a browser</li> </ul> | Huekee@ddoud1000.anmicrosoft.c X<br>Sign m |
|   |  | Sign in with a different user ID           |
|   |  |  |

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



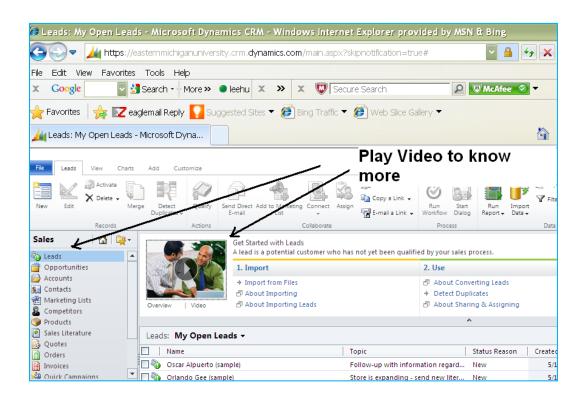
The menu structure is organized as the following picture:

| 🝘 Dashboards: Microsoft Dynamics CRM O  | verview - Microsoft Dynamics CRM - Wir   | dows Internet Explorer provided by                                | MSN & Bing                                |
|---|--|---|---|
| ~   | y.orm. <b>dynamics.com</b> /main.aspx?skipnotification=  |   |   |
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| Jashboards: Microsoft Dynamics CRM O  |  |   | 🔊 - 🖃 🚔 - Pa                              |
| File Dashboards   | Microsof   | t Dynamics CRM  |   |
| Seve New Edit Delete Set As Delete Delete Company   | Refresh Advanced   | _ Action Item   |   |
| Dashboard Management Action   | Query  |   |   |
| Workplace   | Welcome to Microsoft Dynamics CRM Online<br>Dashboards help you get started by providing a high-le | vel view of your information.                                     |   |
| My Wosk   | 1. Explore   | 2. Extend   | 3. Use                                    |
| Activities<br>Calendar<br>Imports   | 문 About this Get Started Pane<br>문 More Access to CRM<br>문 About Desbibloards -Sub Menu            | About Customizing     Dynamics Marketplace     Add More Languages | Manage Samj     Import Data     Add Users |
| Queues  | oub menu   | ^   |   |
| Articles Dashboard: Microso   | ft Dynamics CRM Overview -   |   |   |
| Customers Customers Customers Customers Customers CopenOpportunitie Copportunitie Copportunitie Copportunitie Copportun | Main Menu  | y Source Campaign<br>in current fiscal year                       | Cases By Priority (Per<br>My Active Cases |
| Sales<br>S Marketing  | i i i i i i i i i i i i i i i i i i i  | ew customer 3<br>vent campai 1                                    |   |

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**.

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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.

| Eanting Contact?<br>Ealiting Account?<br>Purchase Tametiame | QUALIEV (Active)<br>clait to enter<br>clait to enter |  |                           |  |                          |   |                       | Huei Le  |
|---|--|--|---------------------------|--|--------------------------|---|-----------------------|----------|
| Existing Account?   |  |  | DEVELOP<br>click to enter | Capture Summary                          | PROPOSE<br>olde to enter | 8 |                       | 1.05E    |
|   | This Quarter   | Estimated Budget<br>Purchase Provess<br>Stentity Devision Make | slick to enter            | Capture summary                          | and a row                |   |                       |          |
| Summary   |  |  |                           |  |                          |   |                       |          |
| CONTACT   |  |  | POSTS ACTIVIT             | IS NOTIS                                 |                          |   | STAKEHOLDERS          |          |
| Tepic*  | Interested in online only store (                    | (sample)   | Grour point Neve          |  |                          |   | Name                  | Role     |
| First Harris *  | Maria  |  | Both Auto posts           | User posts                               |                          |   | No stakeholden tound. |          |
| Leut Name*  | Campbell (sample)                                    |  |                           | Campbell (sample)                        |                          |   |                       |          |
| Job Title   | Purchasing Manager                                   |  |                           | ee created Maria Campbell (Jamp)         | (e)                      |   |                       |          |
| Business Phone  | 555-0105   |  | - On Me<br>Today          | ria Campbell (sample)'s well<br>10:01 AM |                          |   |                       |          |
| Mobile Phone  |  |  |                           |  |                          |   |                       |          |
| E-mail  | someonel4@exemple.com                                |  |                           |  |                          |   |                       |          |
| COMPANY   |  |  |                           |  |                          |   |                       |          |
| Company*  | Fabrikam, Inc. (sample)                              |  |                           |  |                          |   | COMPETITORS           |          |
|   |  |  |                           |  |                          |   | Nama                  | Web Site |
| Web Site  | http://www.fabrikam.com/                             |  |                           |  |                          |   |                       |          |
|   | Http://www.fabrikam.com/<br>12345 ESth South Sk.     |  |                           |  |                          |   |                       | tree ser |
| Web Site  |  |  |                           |  |                          |   | No competition found. | THE SER  |
| Web Site<br>Street  | 12345 ESHI South St.                                 |  |                           |  |                          |   |                       | and pre- |
| Web Ste<br>Street<br>City                                   | 12345 Efrih South St.<br>Cerritos                    |  |                           |  |                          |   |                       | ine str  |

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

| 🗢 Leads My Open Leads - Microsoft Dynamics CRM - Wi                     | idows Internet Explorer  |  |  |  |  |  |  |  |
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| 🚧 Leads My Open Leads - Microsoft Dynamics CRM                          |  |  |  |  |  |  |  |  |
|   | 🏄 Micr   | osoft Dynamics CRM                           |  |  |  |  |  |  |
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| Records Actio   | ns Collaborate   | Process                                      |  |  |  |  |  |  |
| CRM for Outlook See how CRM for Outlook makes you e                     | ren more productive. Get CRM for Outlook   |  |  |  |  |  |  |  |
| Sales 🙆 👾   | Get Started with Leads<br>A lead is a potential customer who has not yet been qualified by your sales proc | iess.  |  |  |  |  |  |  |
| Customers   | 1. Import  | 2. Use                                       |  |  |  |  |  |  |
| Accounts<br>Contacts<br>Sales   | → Import from Files <sup>D<sup>3</sup></sup> About Importing   | About Converting Leads     Detect Duplicates |  |  |  |  |  |  |
| Overview Video  | 🗗 About Importing Leads  | 🗗 About Sharing & Assigning                  |  |  |  |  |  |  |

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|  |   |                                       |  |                     |  |                   | and industrial   |                                 |

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

We will review the second person, Peter Houston.

|          | Peter Ho   | ouston (sam  | ple)   |  |                        | Trade Show                 | Cond | Status<br>New                                      | Hati Leg      |
|----------|--|--|--|--|------------------------|----------------------------|------|--|---------------|
|          | Entire Contect!<br>Entire Account?<br>Furthers Trialtane   | COMPANY (MARINO)<br>Clock (a denter-<br>acted by anner-<br>citics for anner-             | B<br>Converse fuelper<br>Process Process<br>Conversion Maler | DEVELOP<br>S26,000-30<br>Convenities<br>(completed | ill<br>Explore Summery | HOPOIL<br>click to include |      | 0  | 098           |
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| NULVENNY | E-mult<br>COMPANY<br>Company *<br>Visit Site<br>State<br>Provide<br>Company<br>State<br>Provide Code<br>Country Region | samenet County is an<br>Parlager Payo<br>LINI VA Geode Kood<br>Adam<br>N<br>SIDB<br>U.L. |  |  |                        |                            | 10   | naare voorsen<br>Inter-<br>to onregelikens koninal | +<br>Not line |
|          | Details  |  |  |  |                        |                            |      |  |               |

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.

|   | 000.crm.dynamics.com/main.aspx3                           | P   |   |                          |  |                     | × 🔒  |
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| Accounts  |   | + Import from Files   |   | if About                 | Sharing & Assigning                          |                     | 3. Modif<br>+ Creatu<br>+ Set U<br>+ Curto   |

#### Note:

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

You will see the Covert Lead dialog box:

| peci | <b>vert Lead</b><br>fy whether t<br>disqualify it. |                    | into one or more of the foll | lowing optio |
|------|--|--------------------|------------------------------|--------------|
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|      |  |                    |                              | 9            |
|      |  | rency              | 🥰 US Dollar                  | 9            |
|      | ☐ Ope  | n newly created re | cords                        |              |
| С    | Disqualify   |                    |                              |              |
|      | Status   | Lost               |                              | 19           |
|      |  |                    | ок                           | Cancel       |

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.

| Qualify and<br>Status  | convert into the<br>Qualified | following records |          |  |
|--|-------------------------------|-------------------|----------|--|
| ☐ Acco<br>☐ Cont   | unt                           |                   |          |  |
| the second s | ntial Customer                | A Store (sample)  |          |  |
| n F Oper   | n newly created re            | cords             |          |  |
| Status   | Lost                          |                   |          |  |
|  |                               | ок                | Cancel   |  |
| https://easternm   | ichiganuni∨ersi               | ty.ci 🜏 Internet  | <b>A</b> |  |

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

| // https://cicloud1000.crm.dynam   |  | t Dynamics CRM - Windows Internet Explorer<br>ws.ddm.com.com.com.com.com.com.com.com.com.co   | 0-78E7D162CED1%257d%26pagemod   | %3dframe%26preioadca | dw%3d1359626438390%20   | ieskey%3d4213313178c  | agetype-entityrecord |
|--|--|---|---|----------------------|---|-----------------------|----------------------|
| OPPORTUNITY  | ed in online on  |   |   | Est. Close Date      | Est. Revenue  | Status<br>In Progress | Owner*<br>Huei Lee   |
| Customer Need<br>Proposed Solution<br>Identify Stakeholder   | click to enter   | DEVELOP (Active)  | PROPOSE   |                      | CL05  | 5E                    | → NEXT STA           |
| Summary<br>Topic *<br>Centest<br>Account<br>Purchase Timeframe:<br>Currency *<br>Budget Amount<br>Purchase Process | Interested in online only store (sample)<br><u>Minic Carabetti (sample)</u><br><u>Eabrikam Joc. (aangle)</u><br>This Quarter<br><u>US Deltar</u><br><br> | POSTS     ACTIVITIES     NOTES       Enter post here     Both     Auto posts     User posts       Main     Completed (sample)     Completed (sample)     Completed (sample)       Completed (sample)     Completed (sample)     Note (sample)       Completed (sample)     Note (sample)     Completed (sample)       Note (sample)     Completed (sample)     Note (sample)       Completed (sample)     Note (sample)     Note (sample) | ested in online only store (sample).<br>sample)<br>Account Fabrikam, Inc. (sample). | nple), Contact Maria | STAKEHOLDE<br>Name<br>No stalscholde<br>SALES TEAM<br>Name<br>No sales team | rs found.             | Role<br>Role         |
| Proposed Solution  |  |   |   |                      | COMPETITOR:<br>Name<br>No competitor  |                       | Web Site             |

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

| C Opportunities My Open Opp       | ortunities - Microsoft Dynamics CRM - Windows Intern                 | et Explorer                 |                             |                             |                          |                             |  |
|-----------------------------------|--|-----------------------------|-----------------------------|-----------------------------|--------------------------|-----------------------------|--|
| 🕞 🗢 🚂 https://clcloud100          | 0.crm. <b>dynamics.com</b> /main.aspx#                               |                             |                             |                             |                          | ▲ + ×                       |  |
| File Edit View Favorites Too      | s Help X 😽 Safety Level:   | ? Unknown Repo              | ort My Identity             | ?                           |                          |                             |  |
| 🖕 Favorites 🛛 🚖 💽 Suggested :     | ites 🔻 📶 Free Hotmail 👩 Web Slice Gallery 💌                          |                             |                             |                             |                          |                             |  |
| 👍 Opportunities My Open Opportuni | ies - Microsoft Dyn  |                             |                             |                             |                          | 🖞 • 🖾 ·                     |  |
|                                   |  |                             | 🏄 Microsoft Dynam           | ics CRM                     |                          |                             |  |
| FILE OPPORTUNITIES VIEW           | V CHARTS ADD CUSTOMIZE   |                             |                             |                             |                          |                             |  |
| New Edit<br>Records               | 😧 🦰 🖓 📷 📄 🔛 🙀 🖓  | ■ Share                     |                             | Run Import<br>Port - Data - | t to Excel Advanced Find |                             |  |
| CRM for Outlook See how           | CRM for Outlook makes you even more productive. Get CRM              | for Outlook                 |                             |                             |                          |                             |  |
| Sales 🕼 🙀 -                       | Get Started with Opportunities<br>An opportunity is a potential sale |                             |                             |                             |                          |                             |  |
| 4 Customers                       | 1. Import  |                             | 2. Use                      |                             |                          | 3. Modify & Manage          |  |
| Accounts<br>S Contacts            | Import from Files  |                             | About Closing Opportunities |                             |                          |                             |  |
| 4 Sales                           | About Importing  |                             | 🗇 About 9                   | Sharing & Assigning         |                          | Set Up Duplicate Detect     |  |
| 🖏 Leads                           | Overview Video   |                             |                             |                             |                          | Customize Opportunitie      |  |
| Opportunities                     |  |                             |                             | ^                           |                          |                             |  |
| Competitors                       | Opportunities My Open Opportunities -                                |                             |                             |                             |                          | Search for records          |  |
| Collateral                        | Topic  | Potential Customer          | Est. Close Date 🔺           | Est. Revenue Prot           | ability Rating           | E-mail (Potential Customer) |  |
| Quotes Orders                     | Interested in online only store (sample)                             | Fabrikam, Inc. (sample)     |                             |                             | Warm                     |                             |  |
| Invoices                          | Good prospect (sample)   | Tailspin Toys               |                             |                             | Cold                     |                             |  |
| Products                          | 6 orders of Product SKU JJ202 (sample)                               | Fabrikam, Inc. (sample)     | 3/3/2013                    | \$10,000.00                 | 90 Hot                   |                             |  |
| Sales Literature                  | Needs to restock their supply of Product SKU AX305; will             | Blue Yonder Airlines (sam   | 5/3/2013                    | \$25,000.00                 | Hot                      |                             |  |
| <ul> <li>Marketing</li> </ul>     | Very likely will order 18 Product SKU JJ202 this year (samp          | . Alpine Ski House (sample) | 6/3/2013                    | \$30,000.00                 | Hot                      |                             |  |
| 😤 Marketing Lists                 | They sell many of the same items that we do - need to fol            | . Contoso Pharmaceuticals ( | 7/6/2013                    | \$26,000.00                 | 95 Hot                   |                             |  |
| 🚰 Quick Campaigns                 | 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 Opportunit                           | y Webpage Dialog 🛛 🛛 🔀  |
|--|---|
| 🖉 https://ddoud1000.c                        | rm. <b>dynamics.com</b> /SFA/opps/dlg_closeopp.aspx?pId=%7bB104 |
| Close Opportunity<br>Provide the following i | nformation about why this opportunity is being closed.          |
| Status *                                     | 🕑 <sub>Won</sub> C <sub>Lost</sub>                              |
| Status Reason *                              | Won   |
| Actual Revenue *                             | \$0.00  |
| Close Date *                                 | _/_/2013  |
| Competitor                                   |   |
| Description                                  |   |
| ttos://doud1000.com.dv                       | 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

| SWelcome to Microsoft Online Services - Windows Internet Explorer  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
| 💽 🕞 🔻 🌄 1%2fdynamicscrmna.accesscontrol.windows.net%2fv2%2fwsfederation 💌 🔒 Microsoft Cor  | poration [US] 🔄 🗲 🗙 👂 Search Results   |  |  |  |  |  |  |
| File Edit View Favorites Tools Help X 😽 Safety Level: ? Ut   | nknown Report My Identity ?  |  |  |  |  |  |  |
| 🚖 Favorites 🛛 🙀 🔁 Suggested Sites 🔻 🚺 Free Hotmail 🔊 Web Slice Gallery 👻   |  |  |  |  |  |  |  |
| Welcome to Microsoft Online Services   | 🏠 🔻 🔝 🕤 🖃 🖶 👻 Page 🕶 Safety 🕶 Too  |  |  |  |  |  |  |
| Microsoft<br>Dynamics CRM Online   | sign in  |  |  |  |  |  |  |
| Microsoft Dynamics CRM Online brings together software solutions that help companies optimize sales, improve customer service, and measure marketing effectiveness. Logging in here will also log you in to other Microsoft Online Services. | HueiLee@clcloud1000.onmicrosoft.c<br>Sign in<br>Sign in with a different user ID |  |  |  |  |  |  |

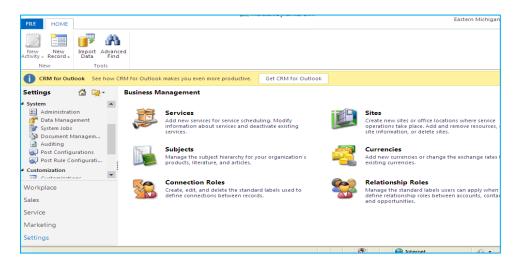
After you login into the account by typing the pre-assigned user ID and password, the following screen appears:

| C Dashboards: Microsoft Dynamics CRM Social Overview  | v - Microsoft Dynamics CRM - Wind  | dows Internet Explorer  |   |
|---|--|---|---|
| 🚱 🕢 👻 🕌 https://dcloud1000.crm.dynamics.com/main.aspro  | r  |   | 💌 🔒 🔄 🗶 Search Results 🖉 P  |
| File Edit View Favorites Tools Help   | X 😽 Safety Level: ? U  | Unknown Report My Identity ?  |   |
| 😭 Favorites 🛛 🏤 😇 Supposted Sites = 🔝 Free Hotmail 🔊 W<br>Jay Dashboards: Microsoft Dynamics CRM Social Overvie | /eb Sice Gallery •   |   | 🏠 • 🖄 - 🖾 🏨 • Page + Safety + Tools + 📦 +   |
| FILE DASHBOARDS   |  | Microsoft Dynamics CRM  | Huei Lee 🥑<br>Eastern Michigan University<br>Sign Out බ   |
| Save New Edit Defets Set As<br>Dashboard Management Action  | Refresh<br>All Query   |   |   |
| CRM for Outlook See how CRM for Outlook makes you en  | ven more productive. Get CRM for O   | Dutlook   | ×   |
| Workplace ② ♀-<br>③ Reports<br>→ Accounts<br>⇒ Accounts<br>⇒ Accounts<br>⇒ Lodd<br>○ Operfundity                | Welcome to Microsoft Dynamics CRJ<br>Kry steps to quickly learn the most come<br>For Users<br>⇒ Add My Accounts and Contacts<br>© About Setting Up Email<br>© More |   | Configure<br>65 About Dashboards<br>07 Turn Off the Get Started Pane<br>+ Add or Remove Sample Data |
|   | t Dynamics CRM Social Overvie  | w •   |   |
| Workplace Sales Pipeline<br>Sales OpenOpportunities<br>Service Marketing  |  | All records •   Both Auto posts User posts<br>Interested in online only store (sample<br>Hous Lee won Opportunity for Account Faturi<br>\$2,000.00. Congratulations!<br>On Interested in online only store (sample)'s | kam, Inc. (sample):<br>Start following colleagues and re<br>and let people following                |
| Settings  | \$25,000,00  | Today 12:49 PM  |   |
| 🛃 start 🐘 🐨 CRM configuration iss 🖉 Deshboard   | is: Microsof 🚺 How to Instal Micros  | s 🖪 Unitiled - Notepad 🛛 🦉 unitiled - Paint   | Ø         internet         √2         €,105%           Ø         €         0.2017         5:2017    |

Click Settings in the main menu:

|   | VIICTOSOIL Dynai  |   |
|---|---|---|
| FILE HOME   |   |   |
| New New Tools   |   |   |
| CRM for Outlook See how   | CRM for Outlook makes you even more productive. Get CRM   | for Outlook   |
| Settings 🚮 📴 -  | Business Management   |   |
| System     Administration     Data Management     System Jobs     Additing     Auditing     Post Configurations     Post Configurations     Customization     Customization | Services           Add new services for service scheduling. Modify information about services and deactivate existing services.           Subjects           Manage the subject hierarchy for your organization products, literature, and articles. | operations take place. Ad site information, or delete   |
| Workplace<br>Sales<br>Service<br>Marketing<br>Settings  | Connection Roles<br>Create, edit, and delete the standard labels use<br>define connections between records.   | d to Relationship Roles<br>Manage the standard lab<br>define relationship roles I<br>and opportunities. |
|   |   | 🛞 🤤 Internet  |
| 🛃 start 🔛 CRM configu   | ration 🧭 Business Managem 🌈 How to Install Micr   | 🔁 Untitled - Notepad 🏾 🦉 untitled - Paint   |

Click the Administration on the submenu:



Click Administration in the submenu:

| Administration - Microsoft Dyn  |                        |   |                  |  |                                       |
|---|------------------------|---|------------------|--|---------------------------------------|
| A Mtps (loidood1000)  | dynamics.com/inamian   | 11014   |                  | A A A Seath Reals  | م                                     |
| le Edit View Favorites Tools  | Help                   | X 🦁 Safety Level: 🆓 Unknown   | Report Hy Ident  | ny   2   |                                       |
| Pavorites   | • C Free Hotmal        | () web Sice Galaxy •  |                  |  |                                       |
| Administration - Microsoft Dynamics (   | RM .                   |   |                  | 🏠 • 🔝 🗆 🚔 • Page • Safety •  | Tools - 🕢 -                           |
| FILE HOME   |                        | 🔐 Microso   | ht Dynamics CRM  | Eastern Michig   | Huei Lee<br>an University<br>Sign Out |
| New New Tools   | a                      |   |                  |  |                                       |
| CRM for Outlook See how CR  | M for Outlook makes yo | you even more productive. Get CRM for Outlook   |                  |  |                                       |
| ettings 🖾 🐄 ·   | Administration         |   |                  |  |                                       |
| System  Administration Cata Management System Jobs                              | Add new                | less Units<br>ew business units. Edit and deactivate existing business un<br>business unit. | sits. Change the | System Settings<br>Set the format for various values, such as numbers, the calendar, and cur<br>Seter the email fracking, marketing, and customization options for your<br>organization. Set Microsoft Dynamics CBM for Outbook options, Manage<br>categories. |                                       |
| Document Managem     Auditing     Post Configurations     Post Rule Configurati |                        | rity Roles<br>new security roles. Manage and delete existing security ro<br>gation.         | les for your     | Field Security Profiles<br>Manage user and team permissions to read, create, or write information in<br>fields.  | n secured                             |
| Vorkplace   | Add new and dele       | ne<br>wy teams and new members to existing teams. Modify the t<br>elete members from teams. | team description | Users<br>Add new users. Edit information about users and deactivate user records.<br>the teams, roles, and licences assigned to users.   | Manage                                |
| ales  |                        |   |                  |  |                                       |
| ervice  | Langua                 |   | 100              | Privacy Preferences<br>Set the prevacy preferences for the organization.   |                                       |
| farketing   | Add or m               | r retiove support for additional languages.   | 10               | set the privacy preferences for the organization.  |                                       |
|   |                        |   |                  |  |                                       |
| lettings  | Cuberal                | rintian Managament  | Anth             | Sustem Motifications   |                                       |

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

| 🖉 Users Enabled Users - Microsoft Dynamics CRM - Windows  | rs Internet Explorer   |  |                              |
|---|--|--|------------------------------|
| 🚱 🕞 💌 🚂 https://dcloud1000.crm.dynamics.com/inain.aspx.#  |  | × .  | 🔒 😝 🗙 👂 Search Results       |
| File Edit View Favorites Tools Help   | Safety Level: ? Unknown  | Report My Identity ?                         |                              |
| 🖕 Favorites 🛛 🖕 😇 Suggested Sites 👻 🌆 Free Hotmail 🙋 Web S  | Slice Gallery +  |  |                              |
| Jug Users Enabled Users - Microsoft Dynamics CRM  |  |  | 👌 • 🔂 · 🗀 🖶 • Page • Saf     |
| TILE USERS VIEW CHARTS CUSTOMIZE  | 🕌 Microsoft Dyn  | mics CRM                                     | Eastern I                    |
| New Edit Approve Reject Sen   | Information of the second seco | Run Start<br>Workflow Distart<br>Process Dat | Advanced Form<br>Find Mode - |
| CRM for Outlook See how CRM for Outlook makes you even n  | more productive. Get CRM for Outlook   |  |                              |
| Settings Settings Users Enabled Users -<br>* System Fill Name -<br>E Administration Hule Compared to the fill Name -<br>Pola Management Setting Notes -<br>Pola Management Anagem.<br>Addition Fill Rule Configurations<br>Pola Configurations<br>Pola Configurations<br>Pola Configurations<br>Vorkplace | Site   | Business Unit Title<br>cicloud1000           | Main Phone<br>734-84-3973    |

Click New in the Action Menu:

| 🖉 Users Enabled      | Users - Micro            | soft Dynamics CRM - Win                                | dows Internet Explo  | orer  |                                  |
|----------------------|--------------------------|--|----------------------|---|----------------------------------|
| <b>GO</b> - <u>M</u> | https://clcloud100       | 0.crm. <b>dynamics.com</b> /main.aspx                  | #                    |   |                                  |
| File Edit View       | Favorites Tool           | s Help   | × 😽 Safet            | y Level: ? Unknown  | Report My Ident                  |
| 🚖 Favorites 🛛 👍      | Suggested S              | ites 👻 📶 Free Hotmail 🖉 V                              | Web Slice Gallery 🝷  |   |                                  |
| 🔏 Users Enabled Us   | sers - Microsoft Dy      | namics CRM   |                      |   |                                  |
|                      | 1                        |  |                      | 🏄 Microsoft   | Dynamics CRM                     |
| FILE USERS           | VIEW CHA                 | RTS CUSTOMIZE  |                      |   |                                  |
| New Edit             | Approve Reject<br>E-mail | Change Roles<br>Change Business Unit<br>Change Manager | Send Direct Connect  | i Copy a Link ↓ S <sup>™</sup> Unfolk<br>i E-mail a Link ↓<br>S <sup>™</sup> Follow | w Start R<br>Workflow Dialog Reg |
| Records              |                          | Actions  |                      | Collaborate   | Process                          |
| CRM for Out          | look See how (           | IRM for Outlook makes you e                            | ven more productive. | Get CRM for Outlook   |                                  |
| Settings             | 🏠 👳 -                    | Users Enabled Use                                      | rs 🔻                 |   |                                  |
| ▲ System             | *                        | Full Name 🔺  |                      | Site  | Business Unit                    |
| Administrati         | ement                    | Huei Lee   |                      |   | cicloud1000                      |

You will see the following screen:

| 🙆 Add Users Webpage Dialog   |                  |
|--|------------------|
| https://clcloud1000.crm.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=2631659F-A668-4A48-833B-D20E187B5A89  | <b>A</b>         |
| Add and License Users  |                  |
| To add new users or assign licenses to users for Microsoft Dynamics CRM Online, go to the Microsoft Office 365 Admin Portal. To do thi<br>License Users. You must be a member of the "User management administrator" or "Global administrator" role. | s, click Add and |
| Add and License Users  | <u>C</u> ancel   |
| https://ddoud1000.crm.dynamics.com/WebWizard/WizardContainer.aspx?WizardId=2631659F-A668-4A48-833B-D20E187B5A89 📀 Interne  | t 🔒              |

| Add and License Us  | in the above screen. The following screen will appear:   |            |
|---|--|------------|
| C Users - Windows Interne   | xplorer  |            |
| S S + ttps://portal   | crosoftonline.com/UserManagement/UserManager.aspx  | A + >      |
| File Edit View Favorites  | ols Help X 😵 Safety Level: ? Unknown Report My Identity ?  |            |
| 👷 Favorites 🛛 🍰 Suggest   | Sites 💌 🌃 Free Hotmail 🙋 Web Slice Gallery 💌   |            |
| Ba Users  |  | <u>ن</u> ا |
| Microsoft <sup>*</sup><br>Online Services   | Home CRM Admin   |            |
| Eastern Michigan University<br>Admin Overview<br>Setup<br>Overview<br>Custom Plan<br>Management<br>Users<br>Security Groups | Users Active   Deleted Single sign-on: Set up   Learn more Active Directory® synchronization: Set up   Learn more Change the password expiration policy for your users: Change now |            |
| Domains   | □ <u>Display name</u> ▲ <u>User name</u>   |            |
| Subscriptions<br>Manage<br>Licenses   | Huei Lee Huei Lee  |            |

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

| Users   |
|---|
| Active   Deleted  |
| Single sign-on: Set up   Learn more<br>Active Directory® synchronization: Set up   Learn more<br>Change the password expiration policy for your users |
| New V   Edit   Reset password   Delete  |
| User<br>Bulk add  |
| Display name ▲  |
|   |

Choose User and the following screen will show:

| 🖉 New user - Windows Internet             | t Explorer                      |                 |                 |           |                         |
|---|---------------------------------|-----------------|-----------------|-----------|-------------------------|
| 😋 💿 🗢 🔀 https://portal.micro              | osoftonline.com/UserManagement, | /EditUser.asp   | ×               |           |                         |
| File Edit View Favorites Tools            | ; Help                          | x 🦁             | Safety Level: ? | Unknown   | Report My Identity      |
| 🚖 Favorites   🚖 🔁 Suggested Si            | tes 👻 📶 Free Hotmail 🙋 Web      | o Slice Gallery | -               |           |                         |
| 23 New user                               |                                 |                 |                 |           |                         |
| Microsoft <sup>.</sup><br>Online Services |                                 |                 |                 |           |                         |
| New user                                  |                                 |                 |                 |           |                         |
| 1. Details                                | Details                         |                 |                 |           |                         |
| 2. Settings                               | Name                            |                 |                 |           |                         |
| 3. Licenses                               |                                 |                 |                 |           | * Required              |
| 4. Email                                  | First name                      | e:              |                 |           |                         |
| 5. Results                                | Last name                       | 2:              |                 |           |                         |
|   | * Display name                  | e:              |                 |           |                         |
|   | * User name                     | e:              |                 | @ clcloud | d1000.onmicrosoft.com 💌 |
|   | Addition                        | al deta         | ails 👻          |           |                         |

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

| Name            |          |                                 |
|-----------------|----------|---------------------------------|
|                 |          | * Required                      |
| First name:     | Кио      |                                 |
| Last name:      | Chen     |                                 |
| * Display name: | Kuo Chen |                                 |
| * User name:    | kuo.chen | @ clcloud1000.onmicrosoft.com 💙 |

Click Next and assign a role:

|      | ettings   |
|------|---|
| A    | ssign role  |
| Do   | you want this user to have administrator permissions? Learn more about administrator roles    |
| ۲    | No  |
| 0    | Yes   |
|      | (Select a role)   |
| Se   | et user location  |
| Diff | ferent services are available in different locations. Learn more about licensing restrictions |
|      | * Required  |
|      | (Select a location)   |

Select a role in the dropdown box.

| Settings<br>Assign role  |
|--|
| Do you want this user to have administrator permissions? Learn more about administrator roles  |
| <ul> <li>No</li> <li>Yes</li> <li>(Select a role)</li> </ul>   |
| (Select a role)<br>Billing administrator<br>Global administrator<br>Password administrator<br>Service administrator<br>See User management administrator |
| Different services are available in different locations. Learn more about licensing restrictions   |
| * Required   |
| * (Select a location)  |

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:

| Microsoft Dynamics CRM Online   | 24 of 25 licenses available |
|---|-----------------------------|
|   | Buy more licenses           |
| CRM Security Roles  |                             |
| After you assign this license to the user, you mu security role so that the user can access your Dy |                             |
| Organization. You or any other CRM administra<br>instructed to do so the next time you sign in to   |                             |
| Learn more.   | bynamics cravit             |

Question: What is a security role?

Click next you will see the following screen:

| The new users and any c<br>yourself. Enter the email |                           |           |  |
|--|---------------------------|-----------|--|
|  |                           |           |  |
| Send email   |                           |           |  |
| chenku60@yahoo.co                                    | m                         |           |  |
| Note: Passwords are                                  | sent in clear text throug | gh email. |  |

Click Create and you will see the following screen.

| Results                              |                    |
|--------------------------------------|--------------------|
| Review your results.                 |                    |
| User name                            | Temporary password |
| kuo.chen@clcloud1000.onmicrosoft.com |                    |
|                                      |                    |
| Create another user                  |                    |
|                                      |                    |

Click Finish.

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

| 🖉 Users Enabled Users - Microsoft Dynamics CRM - Windows Internet Explorer  |   |  |  |  |  |  |  |  |  |
|---|---|--|--|--|--|--|--|--|--|
| 🚱 💿 🖉 🕌 https://cloud1000.crm.dynamics.com/main.aspx#   |   |  |  |  |  |  |  |  |  |
| File Edit View Favorites Tools Help X 😵 Safety Level: ? Unknown Report My Identity ?  |   |  |  |  |  |  |  |  |  |
| 🚖 Favorites 🛛 🏤 🔁 Suggested Sites 👻 📶 Free Hotmail 🖉 Web Silice Gallery 🔹   |   |  |  |  |  |  |  |  |  |
| Users Enabled Users - Microsoft Dynamics CRM  | 🏠 👻 🗟 🗉 🖶 👻 Page -                      |  |  |  |  |  |  |  |  |
| 😹 Microsoft Dynamics CRM  |   |  |  |  |  |  |  |  |  |
| FILE USERS VIEW CHARTS CUSTOMIZE  | East                                    |  |  |  |  |  |  |  |  |
| New       Edit       Reject       Schange Business Unit       Send Direct Connect       E-mail a Link •         New       Edit       E-mail a Link •       Send Direct Connect       Follow       | Run Start<br>Workflow Dialog            |  |  |  |  |  |  |  |  |
| Records Actions Collaborate   | Process Data Form                       |  |  |  |  |  |  |  |  |
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Double click the new user. Can you can see the profile of the new user?

| 🖉 User   | : Kuo Ch                            | en - Micro           | soft Dy   | mamics CRM - Win  | dows Internet Explorer  |            |                       |                          |                        |                 |             |                 |                  |
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| Image: Security Roles       4 General         Image: Security Profiles       Account Information |                                     |                      |   |   |   |            |                       |                          |                        |                 |             |                 |                  |
| 1  | Nork Hou<br>Connectio               |                      |   | User Name *<br>User Information                           | kuo.chen@clcloud1000.on   | microsoft. | com                   |                          |                        |                 |             |                 |                  |
| 2  | Audit Hist                          | ory                  |   | First Name *  | Кио   |            |                       | Main Phone               |                        |                 |             |                 |                  |
| 4 Servic   |                                     |                      |   | Last Name *   | Chen  |            |                       | Other Phone              |                        |                 |             |                 |                  |
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|  | Resource (                          | broups               |   | Primary E-mail *  | kuo.chen@clcloud1000.on   | microsoft. | com                   | Mobile Phor              | ne                     |                 |             |                 |                  |
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Go back to the previous screen, and click Settings -> Administration -> Security Role

| 🖉 Security Roles All Roles - Microsoft Dynamics CRM - Windows Internet Explorer  |                                 |                            |   |  |  |  |  |  |  |
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|  | et CRM for Outlook              |                            | ×                                       |  |  |  |  |  |  |
| Settings 🕼 🙀 Security Roles  |                                 |                            |   |  |  |  |  |  |  |
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| System Jobs  | Business Unit                   |                            |   |  |  |  |  |  |  |
| Document Managem   | cicloud1000                     |                            | <i>8</i>                                |  |  |  |  |  |  |
| Auditing Activity Feeds  | cicloud1000                     |                            |   |  |  |  |  |  |  |
| Post configurations CCO-business manager CSR Manager                             | cicloud1000                     |                            |   |  |  |  |  |  |  |
| Customization     Customer Service Representative                                | cicloud1000                     |                            |   |  |  |  |  |  |  |
| Contonication     Contonication     Contonication     Contonication     Delegate | cicloud1000                     |                            |   |  |  |  |  |  |  |
| Workplace Marketing Manager  | cicloud1000                     |                            |   |  |  |  |  |  |  |
| Sales Marketing Professional   | cicloud1000                     |                            |   |  |  |  |  |  |  |
| Sales Manager  | cicloud1000                     |                            |   |  |  |  |  |  |  |
| Service Salesperson  | clcloud1000                     |                            | *                                       |  |  |  |  |  |  |
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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.

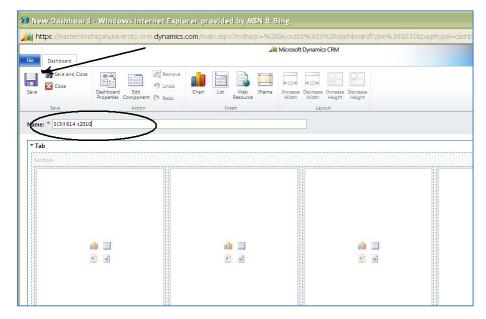
| 🤪 Dashboards: Microsoft Dynamics CRM C                      | Overview - Microsoft Dynamics CRM - Win   | dows Internet Explorer provided by                                    |
|---|---|---|
| 🚱 🕤 🔻 🏄 https://easternmichiganunivers                      | ity.crm. <b>dynamics.com</b> /main.aspx?skipnotification=   | true# 💽 🔒 🗲 🗙 【   |
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| 🟄 Dashboards: Microsoft Dynamics CRM O                      |   | 🏠 👻   |
|   | 📈 Microsoft   | Dynamics CRM  |
| File Dashboards   |   |   |
| Save<br>As  | Refresh Advanced  |   |
| Dashboard Management Action                                 | Query   |   |
| Workplace   | Welcome to Microsoft Dynamics CRM Online<br>Dashboards help you get started by providing a high-lee | vel view of your information.   |
| Dashboards  | 1. Explore  | 2. Extend   |
| Activities     Calendar     Jimports     Overview     Video | 라 About this Get Started Pane<br>라 More Access to CRM<br>라 About Dashboards                         | 문 About Customizing<br>문 Dynamics Marketplace<br>문 Add More Languages |
| A Queues  | oft Dynamics CRM Overview 👻   | *   |

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

| ect Dashboard Layo<br>t a layout for your das<br>ut. | out<br>shboard. You can use this as your initial outline, and th   | nen resize, add, or rearrange the components with  |
|--|--|--|
| 3-Column<br>Regular Dashboard                        | 3-Column<br>Multi-Focused Dashb<br>3-Column<br>Gverview Dashboard<br>3-Column<br>Overview Dashboard<br>3-Column<br>Focused Dashboard | Column<br>Regular Dashboard<br>This layout can accommodate components<br>across three columns. |
|  |  |  |

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?

4. How does Microsoft Dynamics CRM help a company to deepen business insight?

#### A.2.3 Social Media and Microsoft Dynamics CRM

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

http://www.ignify.com/dynamics\_CRM\_Social\_Media\_accelerator.html

- 1. What social media are used with Microsoft CRM in this video?
- 2. When you see the screen for Social Network Contact, you will see 'influence.' Explain what 'influence' is?

(You should have 3 screenshots for the whole assignment)

#### **B.** Assessment Questionnaire (Optional): See Figure 6

|     |  | Stre | ongly | y Dis | agree | 9 | St | rongly Agree |
|-----|--|------|-------|-------|-------|---|----|--------------|
| 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<br>managers to develop a good relationship with<br>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<br>CRM Online interesting to use.                                  | 1    | 2     | 3     | 4     | 5 | 6  | 7            |

## Figure 6: Full assessment questionnaire

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