USING MICROSOFT DYNAMICS CRM FOR BUSINESS PROCESS MANAGEMENT: A CURRICULUM PACKAGE FOR BUSINESS PROCESS MANAGEMENT OR SUPPLY CHAIN MANAGEMENT COURSES

Kuo Lane Chen, Associate Professor, School of Computing
University of Southern Mississippi, Hattiesburg, MS 39406
Kuo.Chen@usm.edu

Huei Lee, Professor, Department of Computer Information Systems, College of Business
Eastern Michigan University, Ypsilanti, MI 48197
Huei.Lee@emich.edu

Abstract*: IS 2010 Curriculum Guidelines (IS2010),* sponsored by ACM or AIS, lists Business Process Management as an elective new core course for IS/IT/MIS majors. The content of these courses are not only suitable for a student majoring in the Information Technology (IT), Management Information Systems (MIS), or Computer Science (CS) but also for a student majoring in Supply Chain Management (SCM) or Accounting Information Systems (AIS). The purpose of this curriculum package is to demo how to use the Microsoft Dynamics CRM as a tool in one of the classes in Business Process Management or Supply Chain Management courses.

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

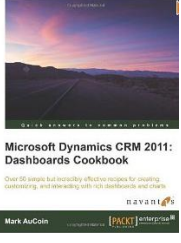http://highered.mcgraw-hill.com/sites/0073195588/student_view0/
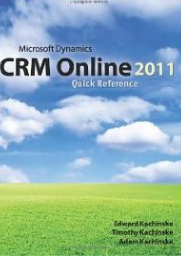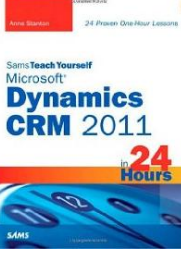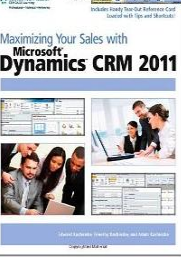
2. Read the first chapter of the following book and understand the features of Microsoft Dynamics CRM:
   Marc J. Wolenik, Damian Sinay, and Rajya Vardhan Bhaiya, *Microsoft Dynamics CRM 2011 Unleashed,*

B. Optional Reading
   You can browse the Internet to look the following books, video clips, or articles but it is not required:

B1. Books

1. Mike Snyder, Jim Steger, Brendan Landers, *Microsoft Dynamics CRM 2011 Step by Step*, Microsoft Press, January 2011, ISBN-13: 9780735648906, (450 pages)	
2. Mike Snyder, Jim Steger, and Kristie Reid, *Working with Microsoft Dynamics CRM 2011*, ISBN-13: 9780735648128 (624 pages)	
3. Marc J. Wolenik, Damian Sinay, and Rajya Vardhan Bhaiya, *Microsoft Dynamics CRM 2011 Unleashed,*	
4. Matthew Wittemann and Geoff Ables, *Microsoft Dynamics CRM 2011 Administration Bible,*	

5. Mark AuCoin, *Microsoft Dynamics CRM 2011: Dashboards Cookbook*	
6. Edward Kachinske, Timothy Kachinske, and Adam Kachinske Microsoft Dynamics CRM Online 2011 Quick Reference,	
7. Anne Stanton, Sams Teach Yourself Microsoft Dynamics CRM 2011 in 24 Hours, January 2012, ISBN-13: 978-0672335372	
8. Edward Kachinske, Timothy Kachinske, and Adam Kachinske, *Maximizing Your Sales with Microsoft Dynamics CRM 2011*	

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 (See Attached PowerPoint File)

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 Objective of the Assignment

1. 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. You can also contact DYNAA for set up a one-semester account. Please contact dynaa@microsoft.com

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:
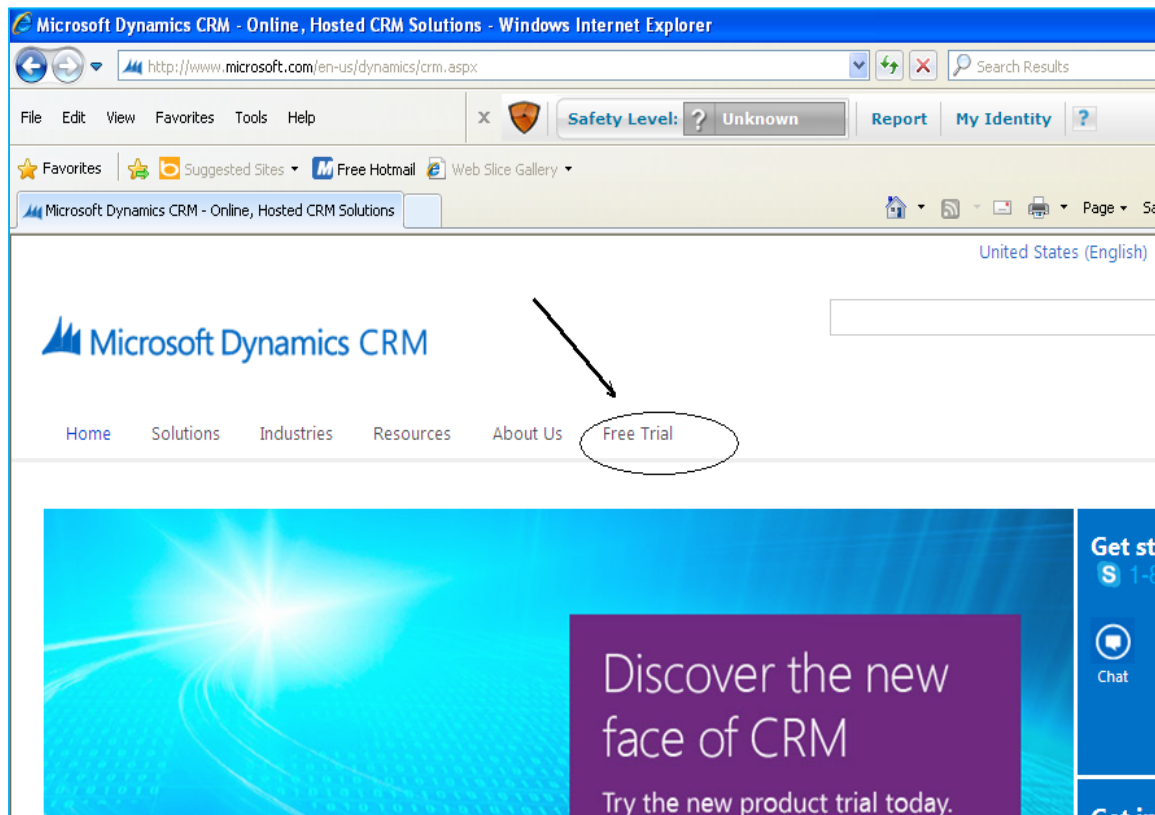
3. Click Free Trail to go to the following screen:
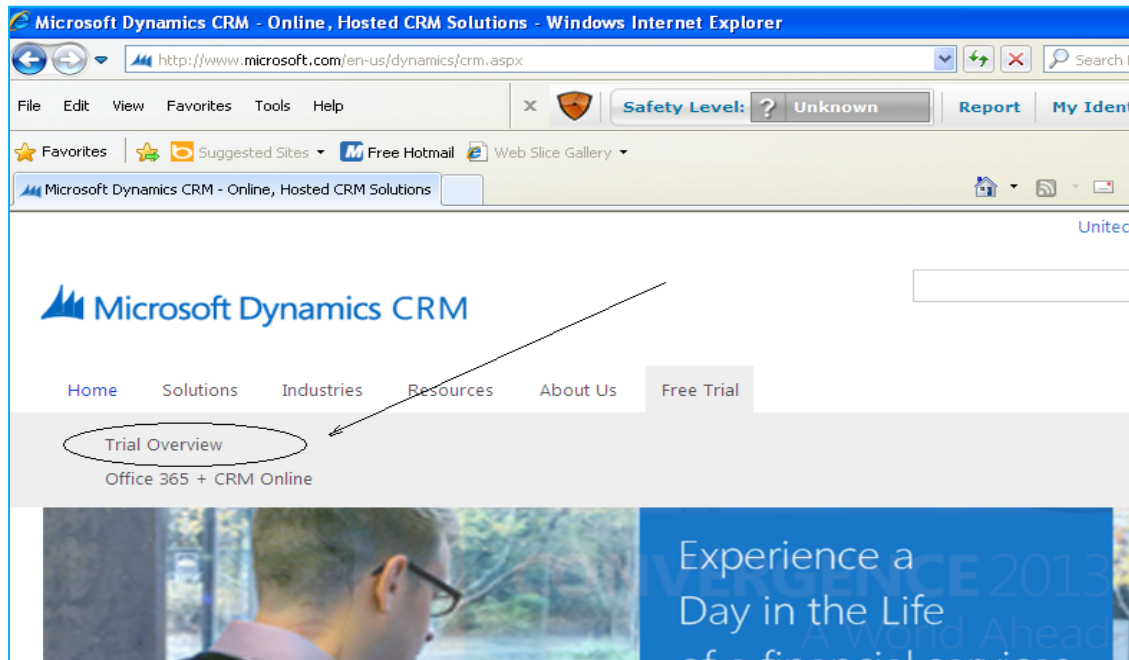
4. Click Trial Overview, you will see the following screen:
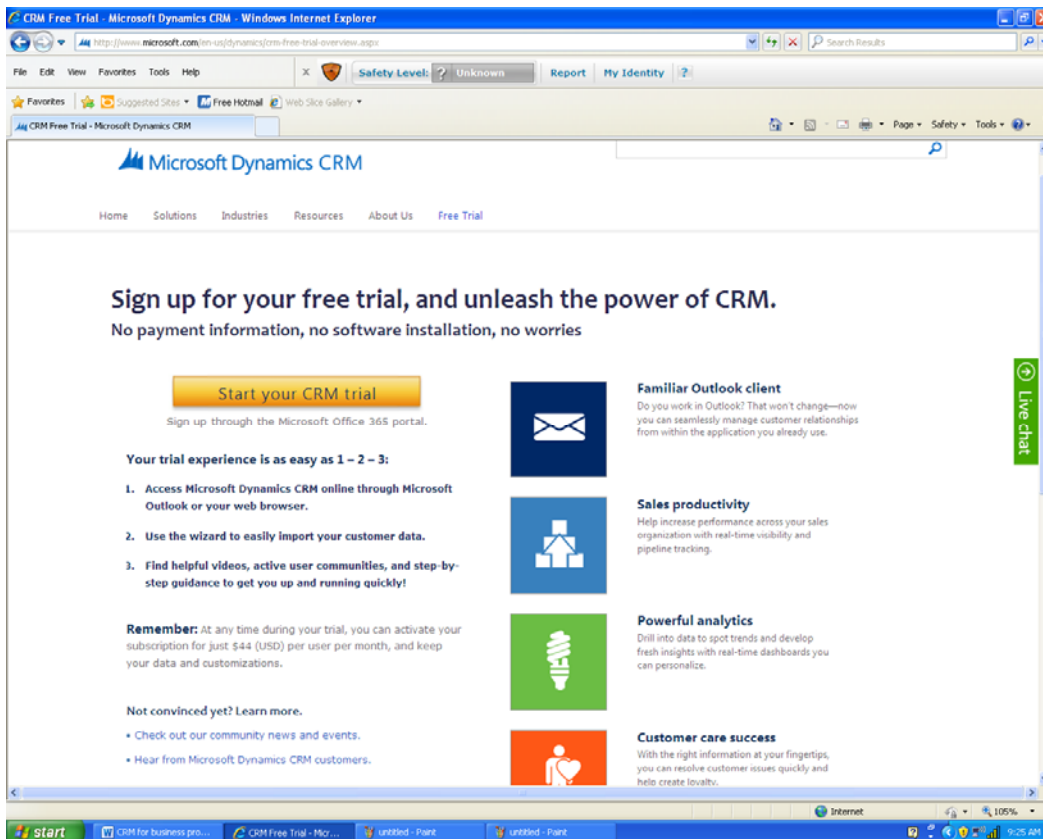
5. Click [Start your CRM trial] in the above screen to go the following screen:
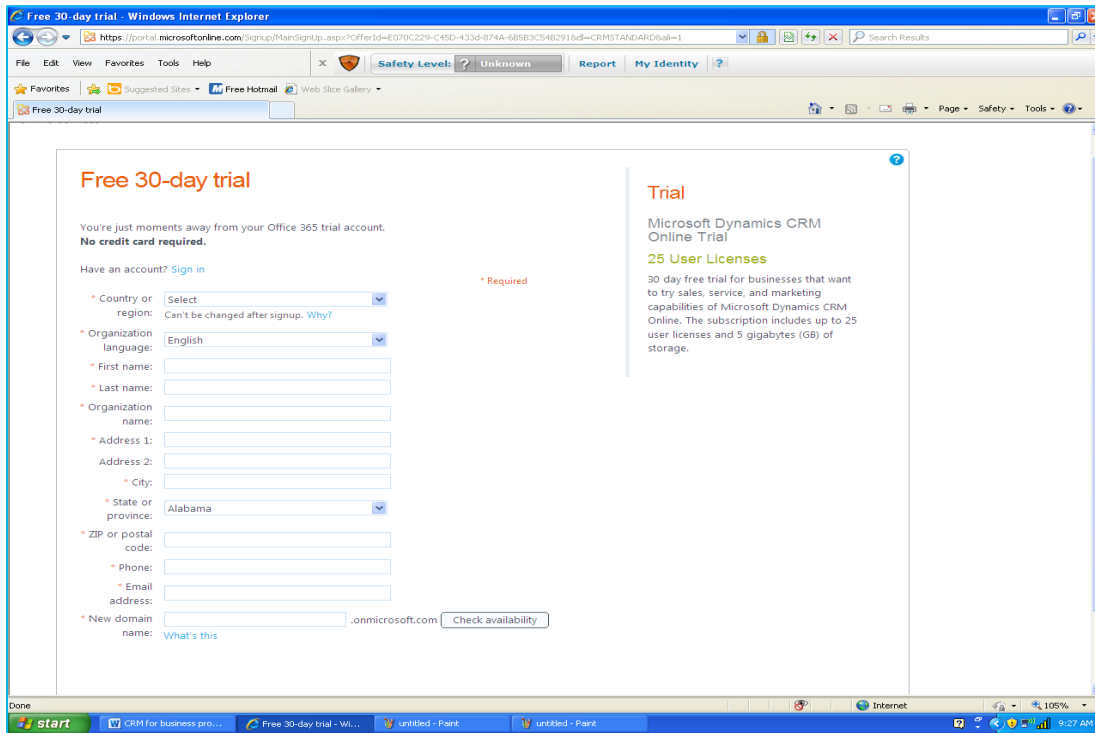
6. Filling out the form above and make sure that you remember your user id and passwords. After filling out the form and submit it, you may receive the following screen:
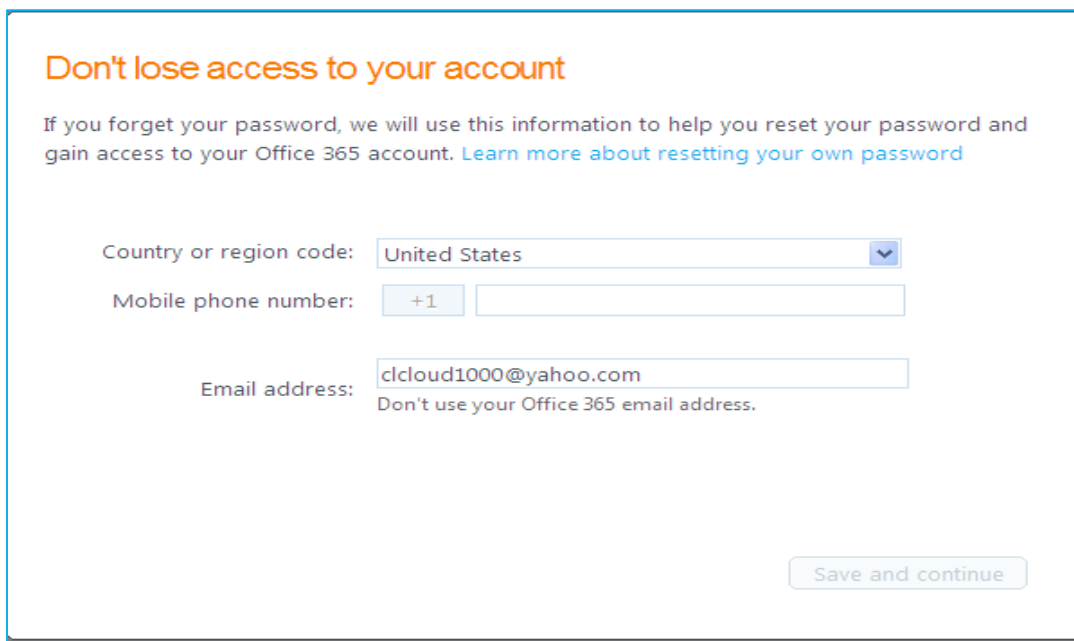
7. Enter your phone number (It actually does not have to be a mobile phone number. Any telephone will be fine) and you will receive the follow screen:
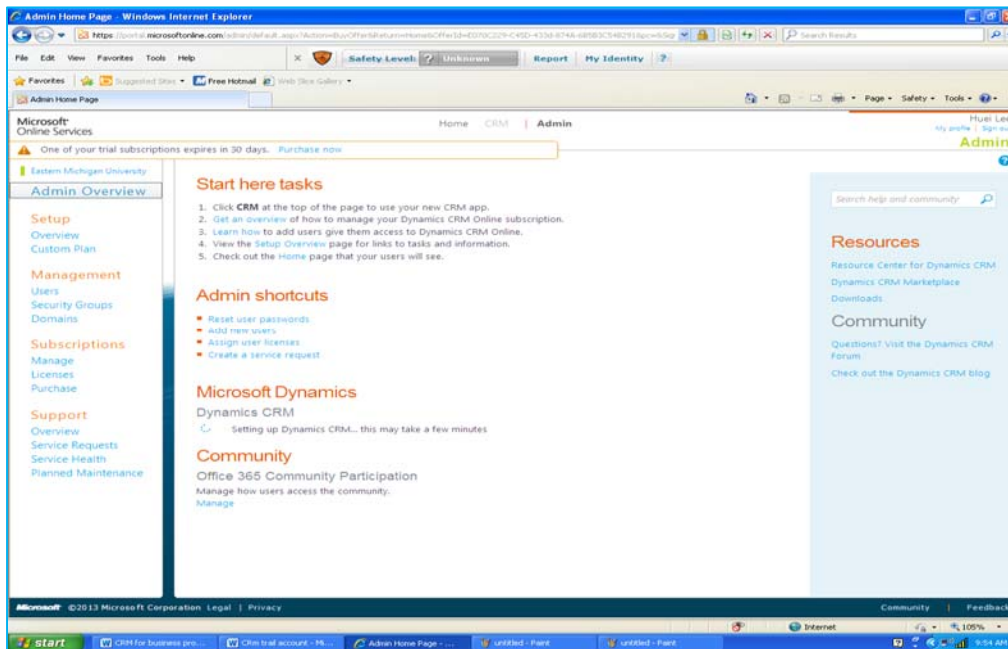
8. Click **CRM** at the top of the page to use your new CRM app. You will see the following screen:
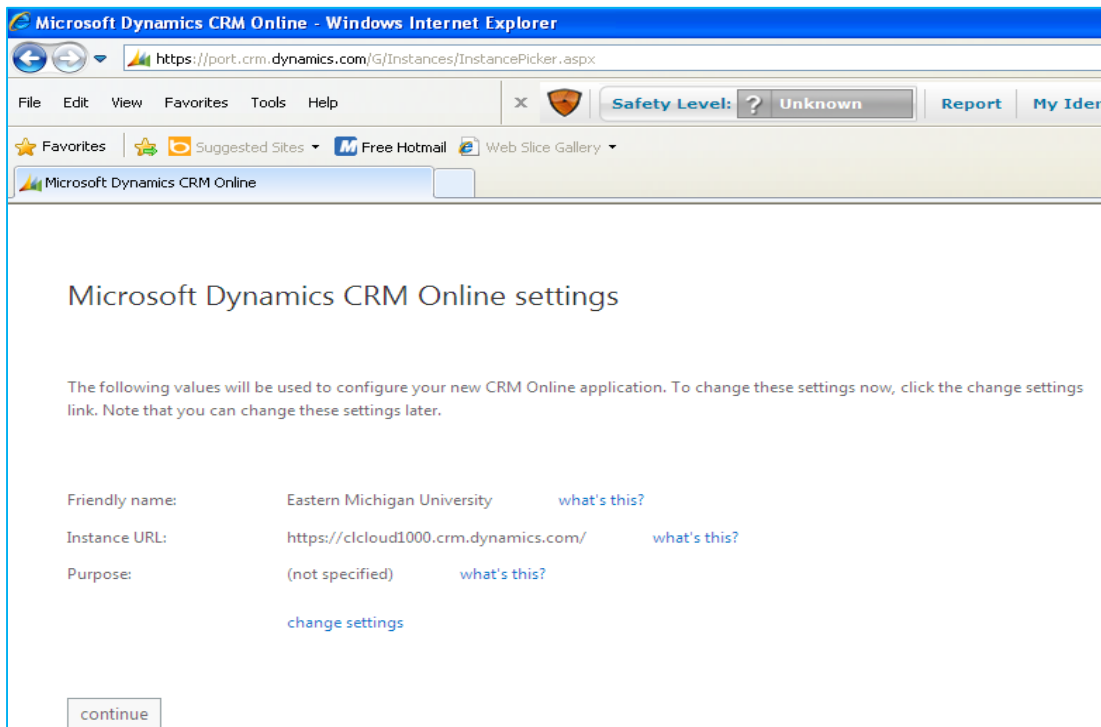
9. Make sure that you remember the URL in the above screen. You can do a screenshot and put into a safe place. Click "continue" button to continue.
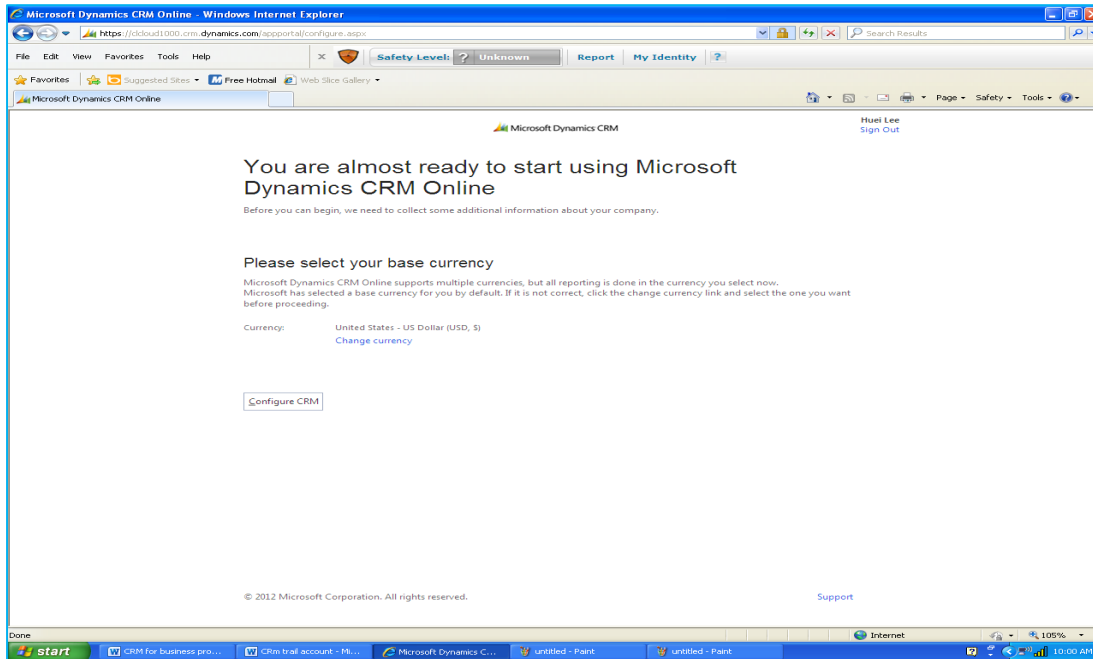
10. Select your base currency. If you use US dollar, just click "Continue CRM" and you will see the following screen.
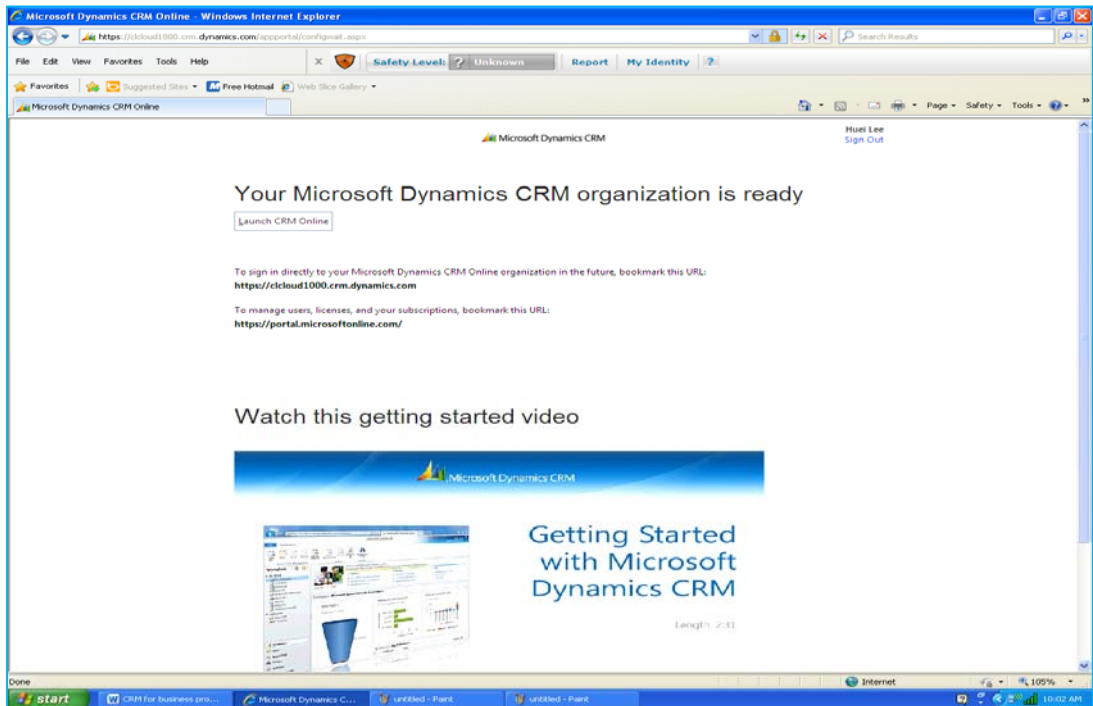
11. Your process is finished. Click "Launch CRM Online" to continue. You will see the following screen.
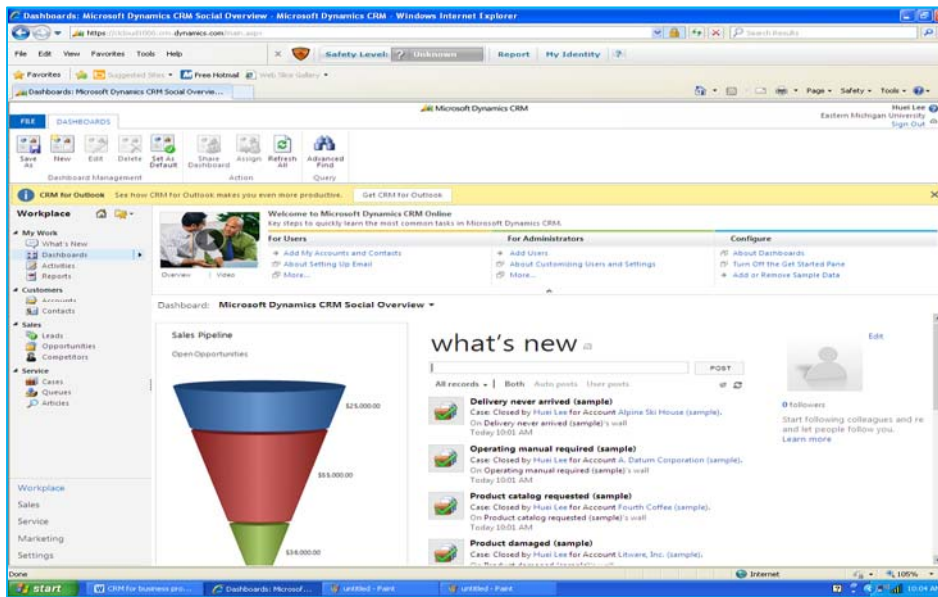
If you can see the screen, your CRM setup is finished. Next time you will go to the Internet Explorer and start your CRM online.

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

B.2.1 The Objective of the Assignment

1. Understand basic features of Microsoft Dynamics CRM online

2. Understand 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:
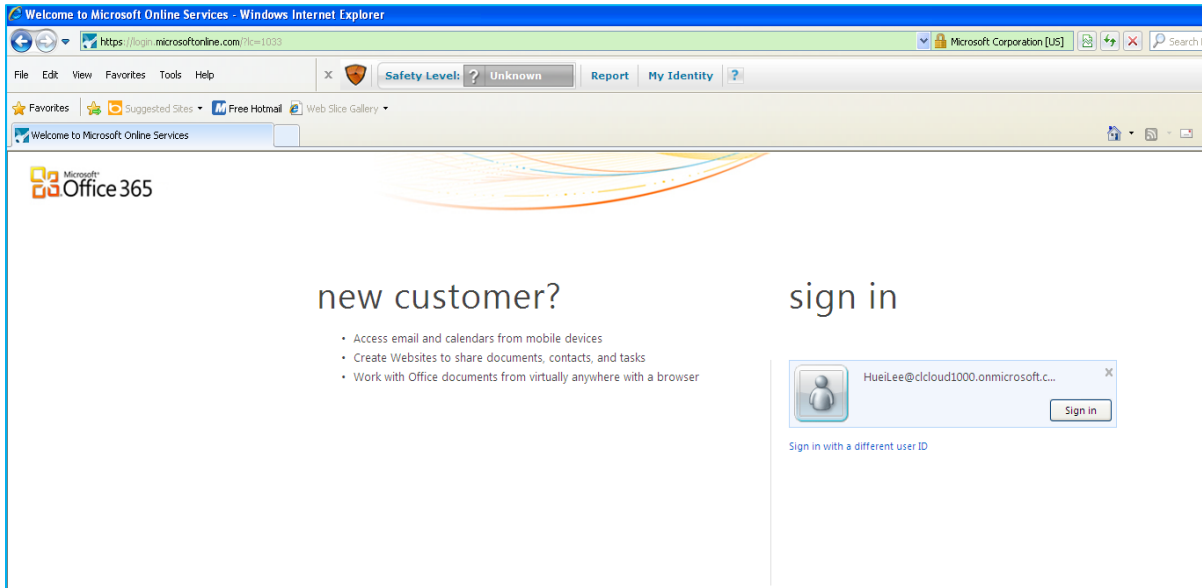
2. Login with your user id and password. You will see the following screen (your screen may be a little different from mine):
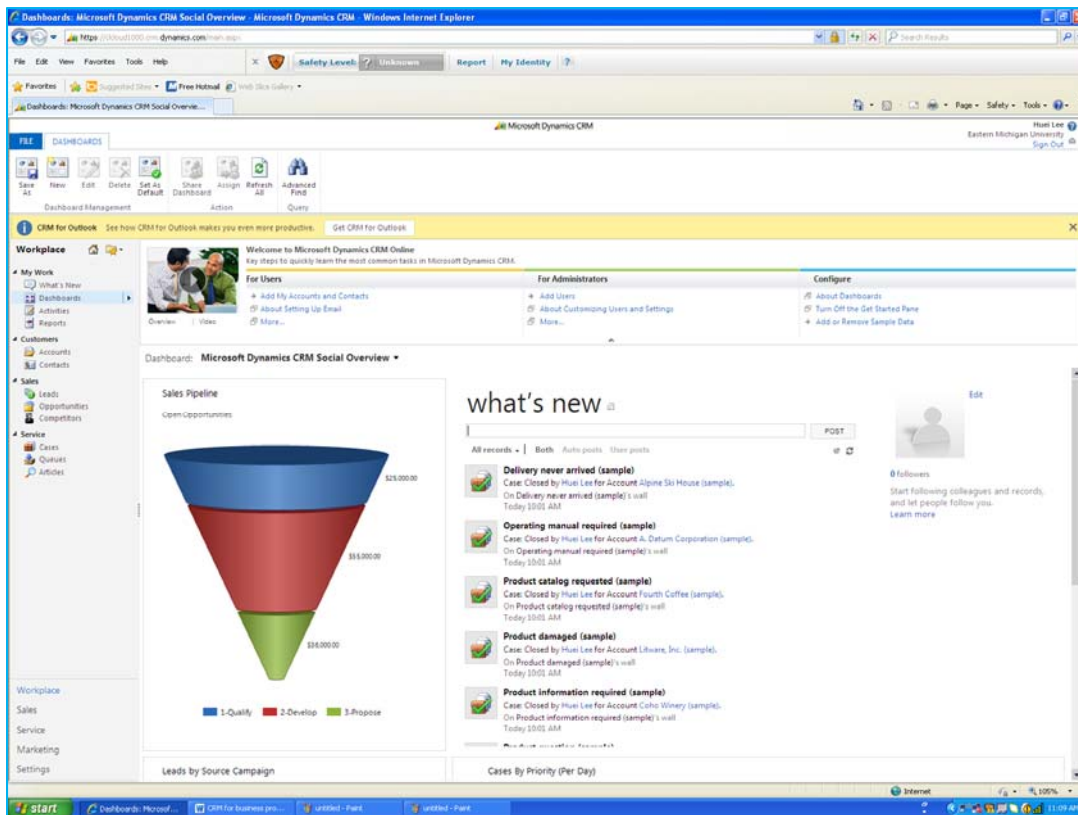
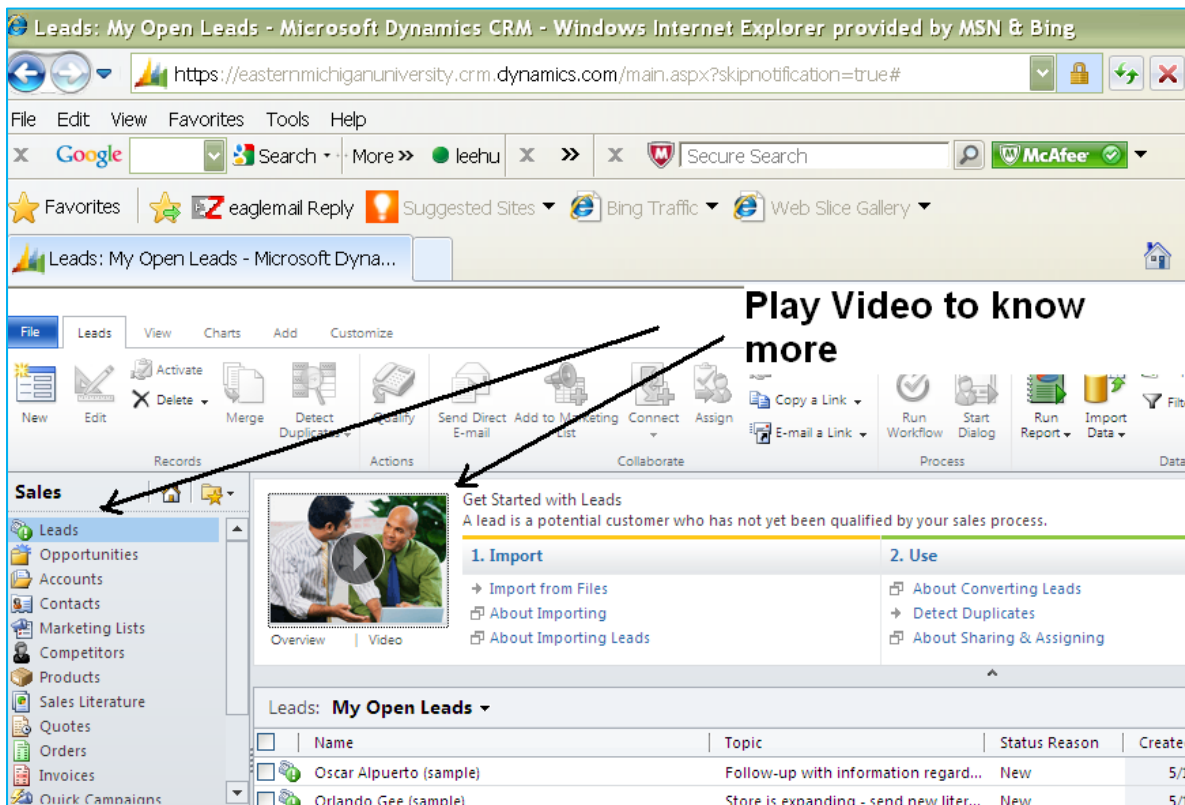The menu structure is organized as the following picture:
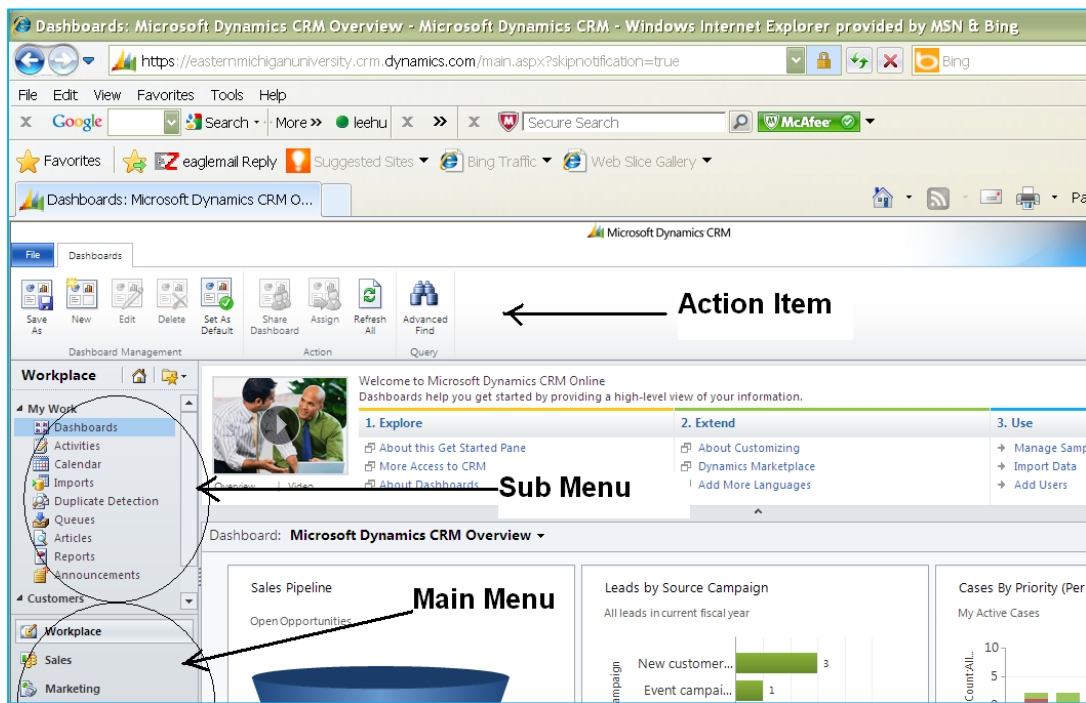
Answer the following questions:

1) List major items in main menu.

2) List four sub menu items in Sales (the second items in main menu).

3) List two items in Action items.

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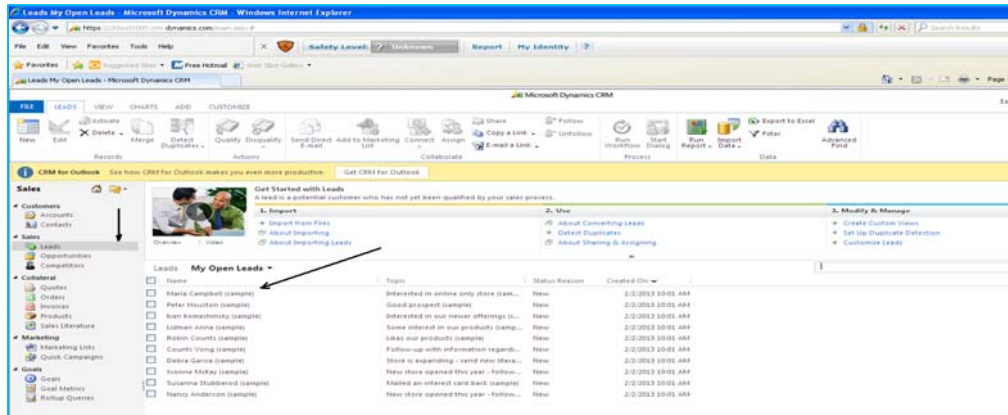
2. Leads are potential customers for your company. In the list of leads, the first one is Maria Campbell. After review her profile and contact her (See the following picture), you believe that she can be converted to Opportunity. Close the profile.
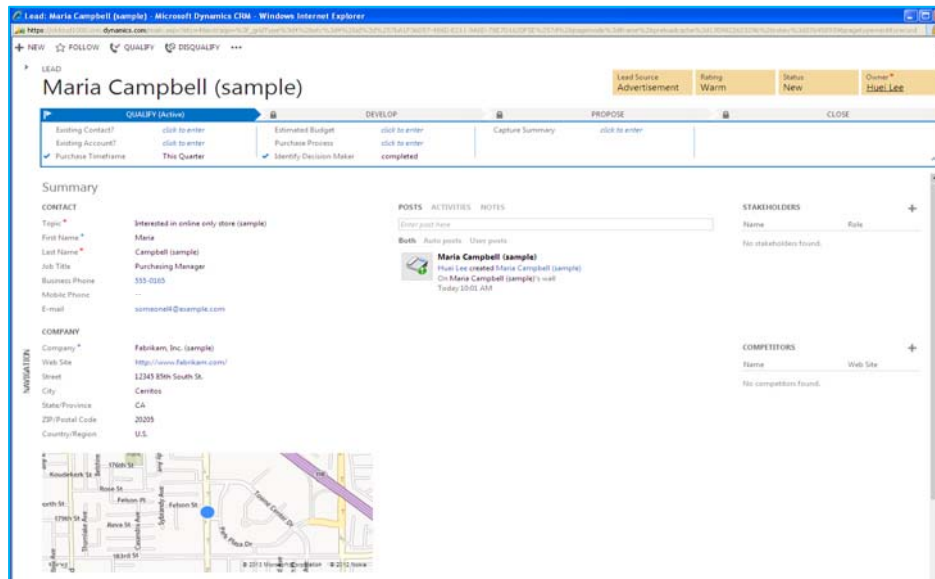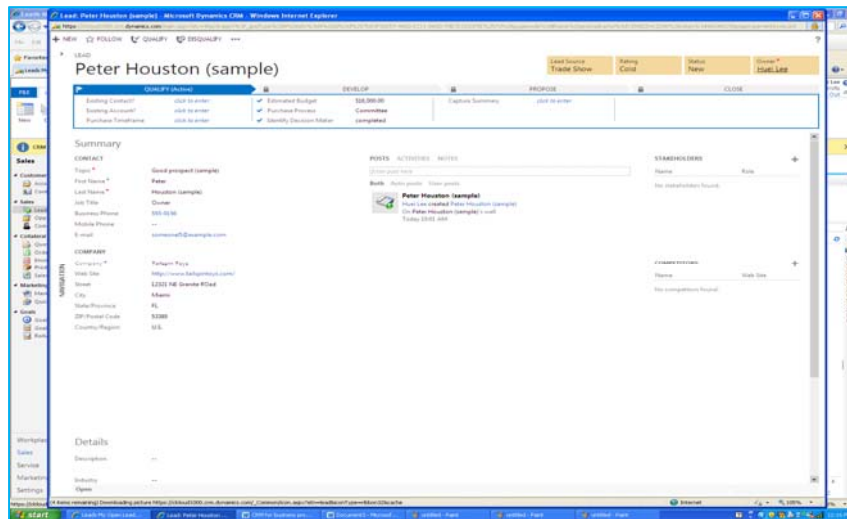

3. You are back to the previous screen. Put a check mark on Maria Campbell and click Qualify.
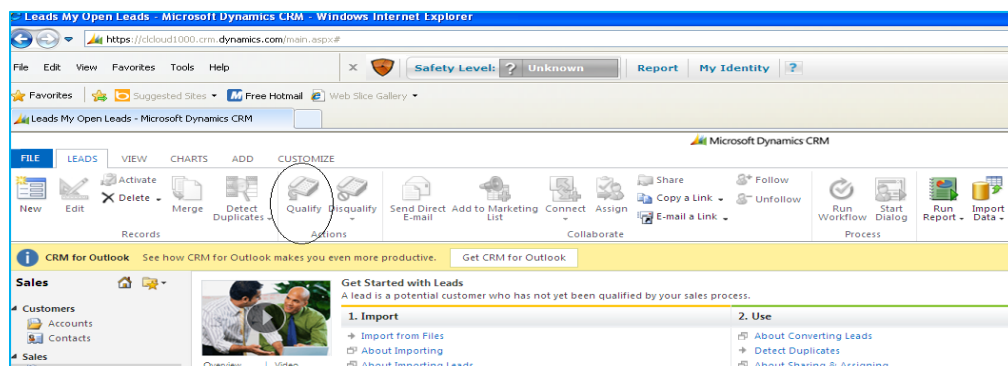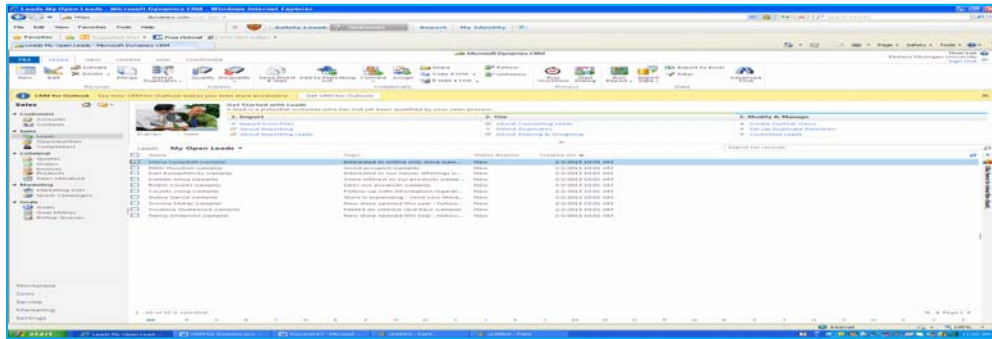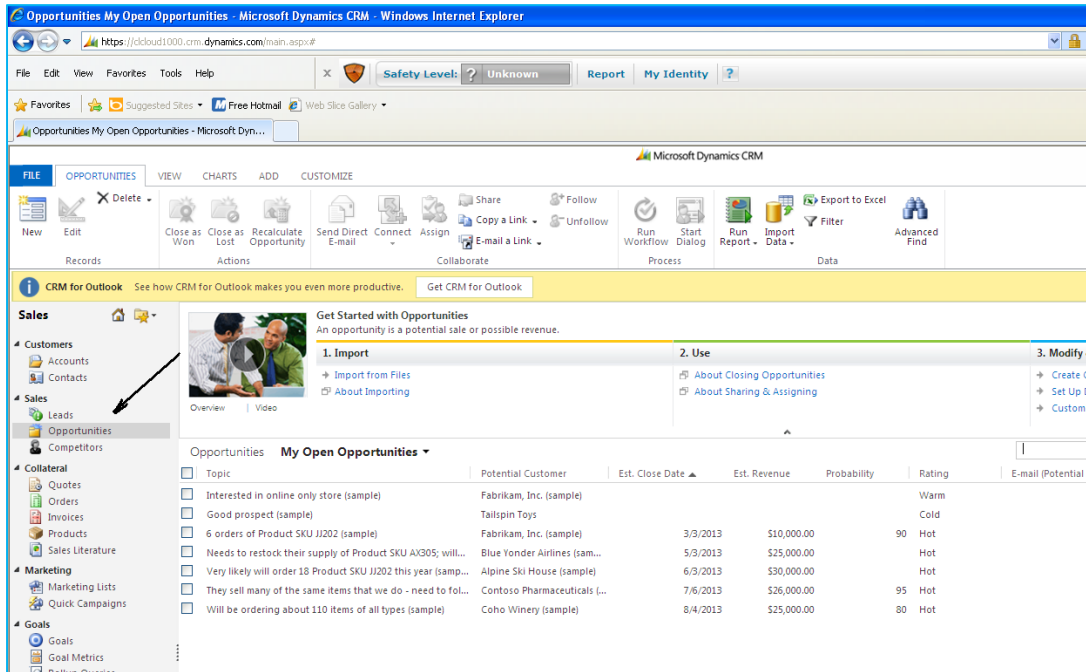
The Maria's name is disappeared because she is moved to the list of the opportunity.

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 is disappeared too.
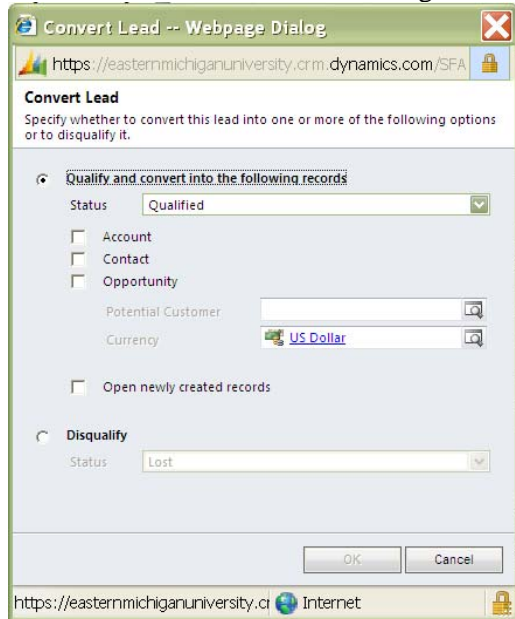
Click Opportunity on the submenu, you will see first two are Maria Campbell and Peter Houston.

Note:

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

You will see the Covert Lead dialog box:

4. 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.
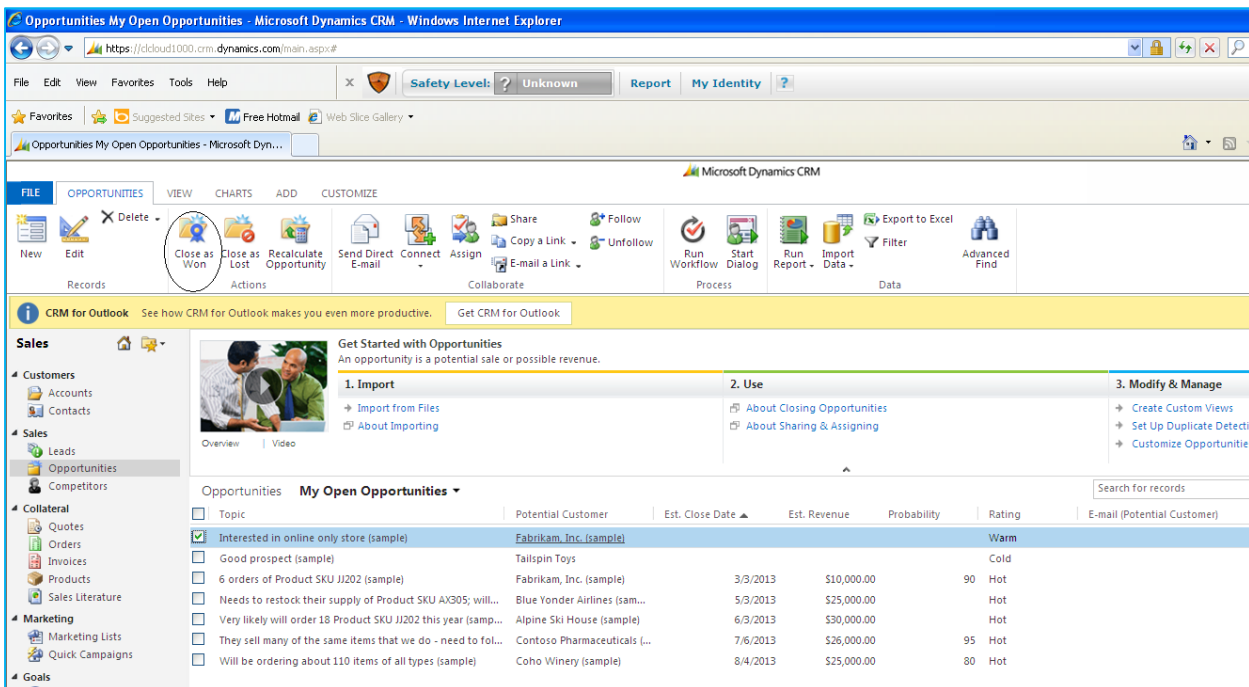
Currency If you select **Opportunity**, you must select the currency (US dollar) in which the opportunity will be calculated.

Click on the first line and you will see the information about Maria Campbell.
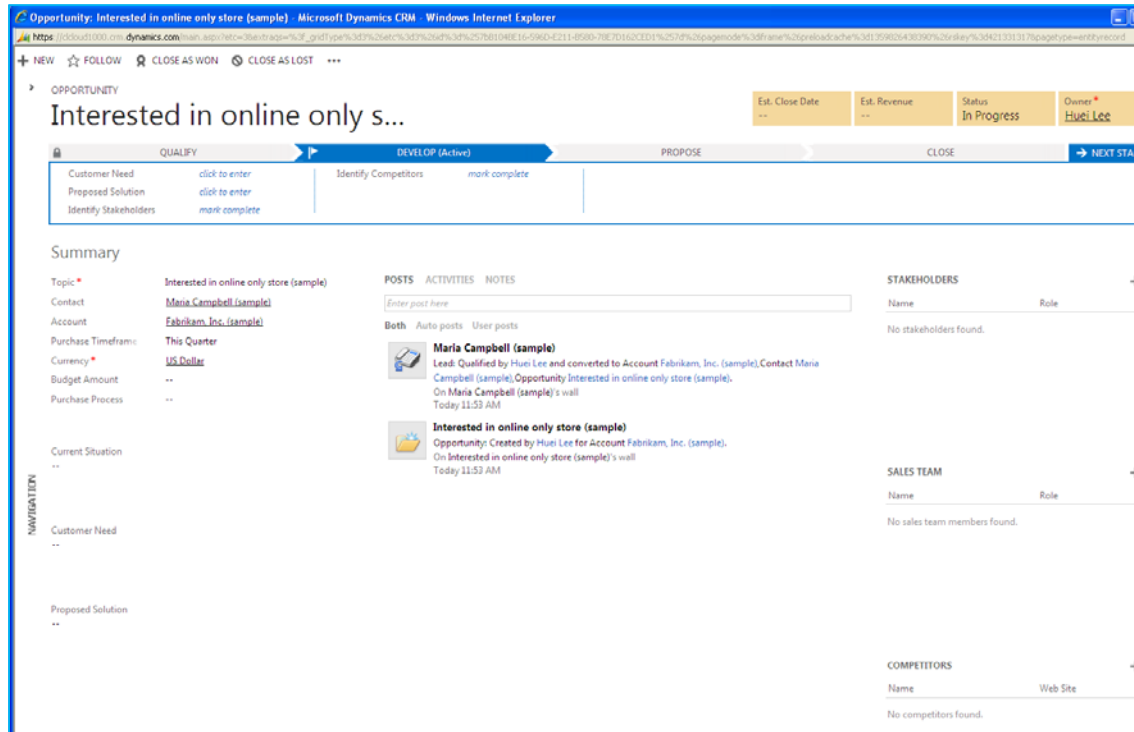
If she decides to purchase, we will click "close as won". She become the customer

You will see the following screen:

Enter the amount $2,000 and correct the dates.

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

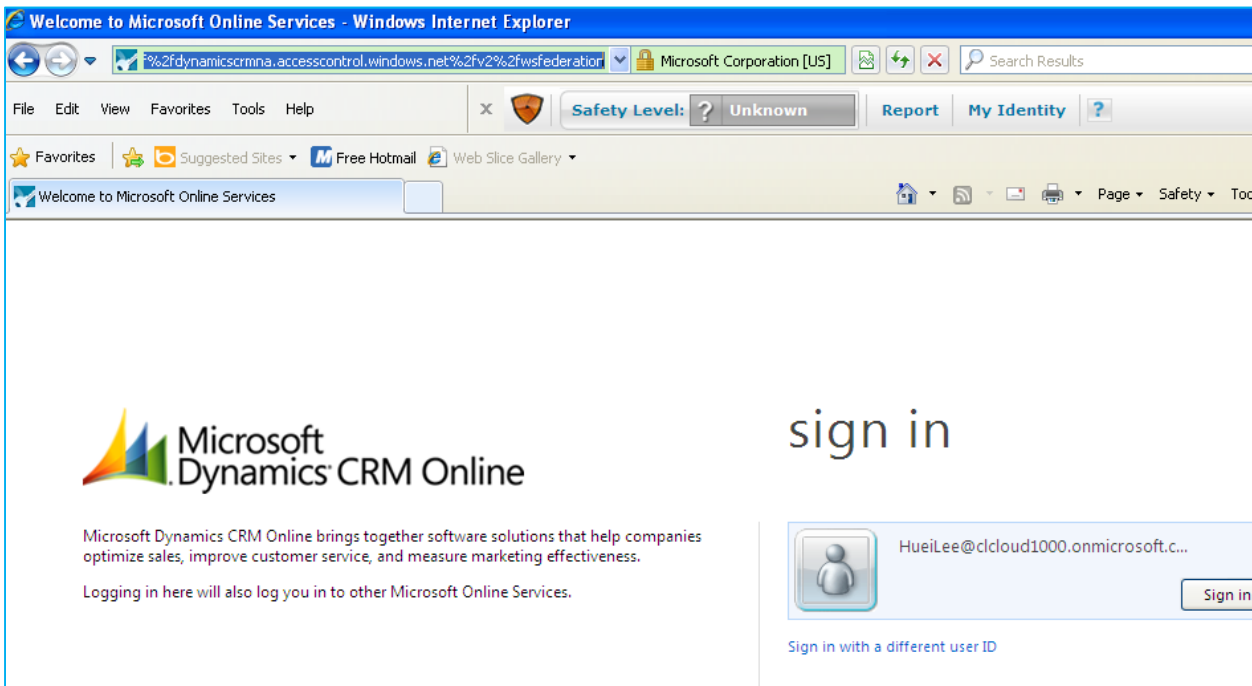**B3. Security and Auditing Control (15 minutes)**

B.3.1 The Objective of the Assignment

The purpose of this assignment is to show how to create a user, user ID, password, assign a user role, and security role.
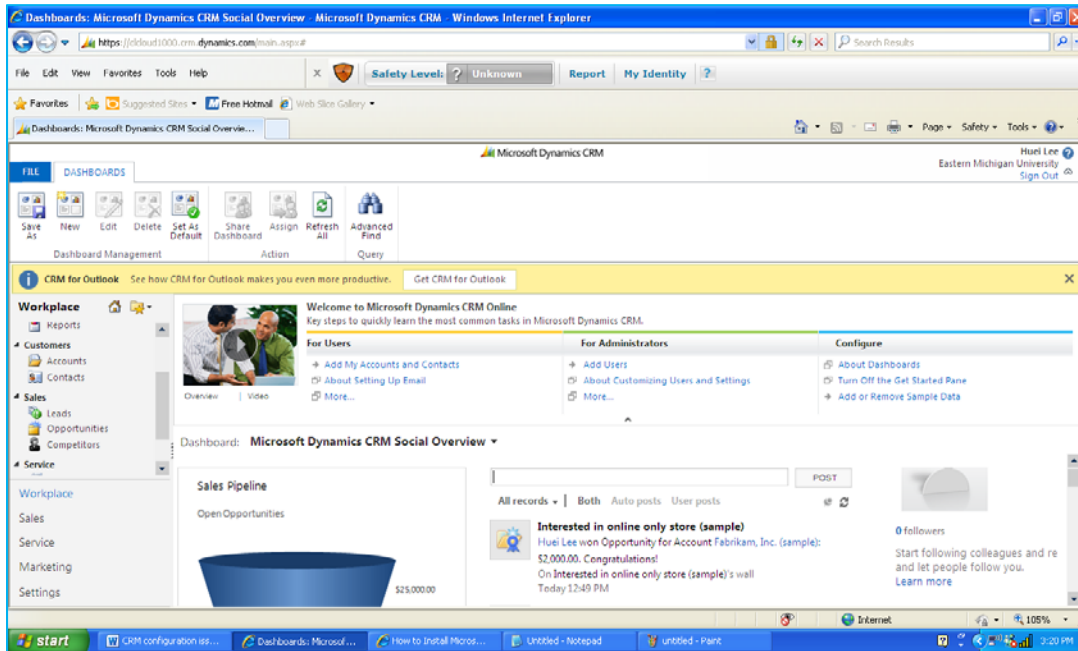
B.3.2 Assign a New User and Security Role

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

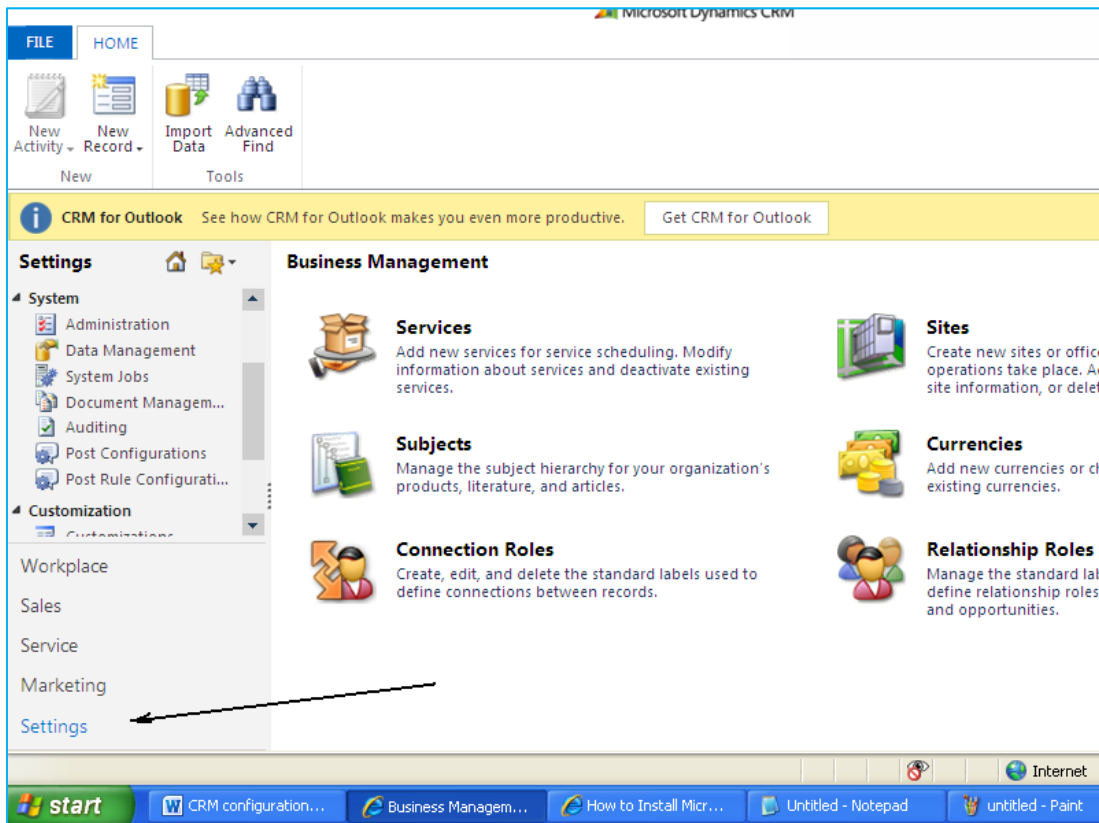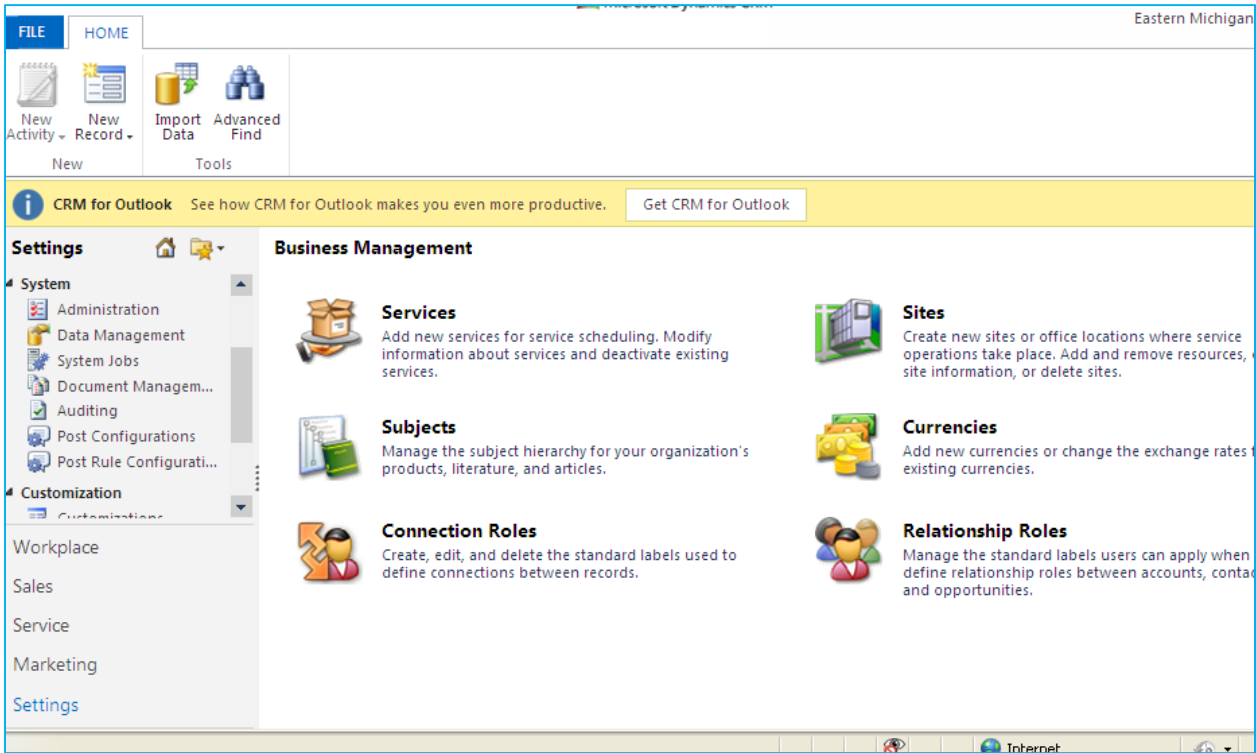https://clcloud1000.crm.dynamics.com

After you login into the account by typing the pre-assigned user and passwords, the following screen appears:
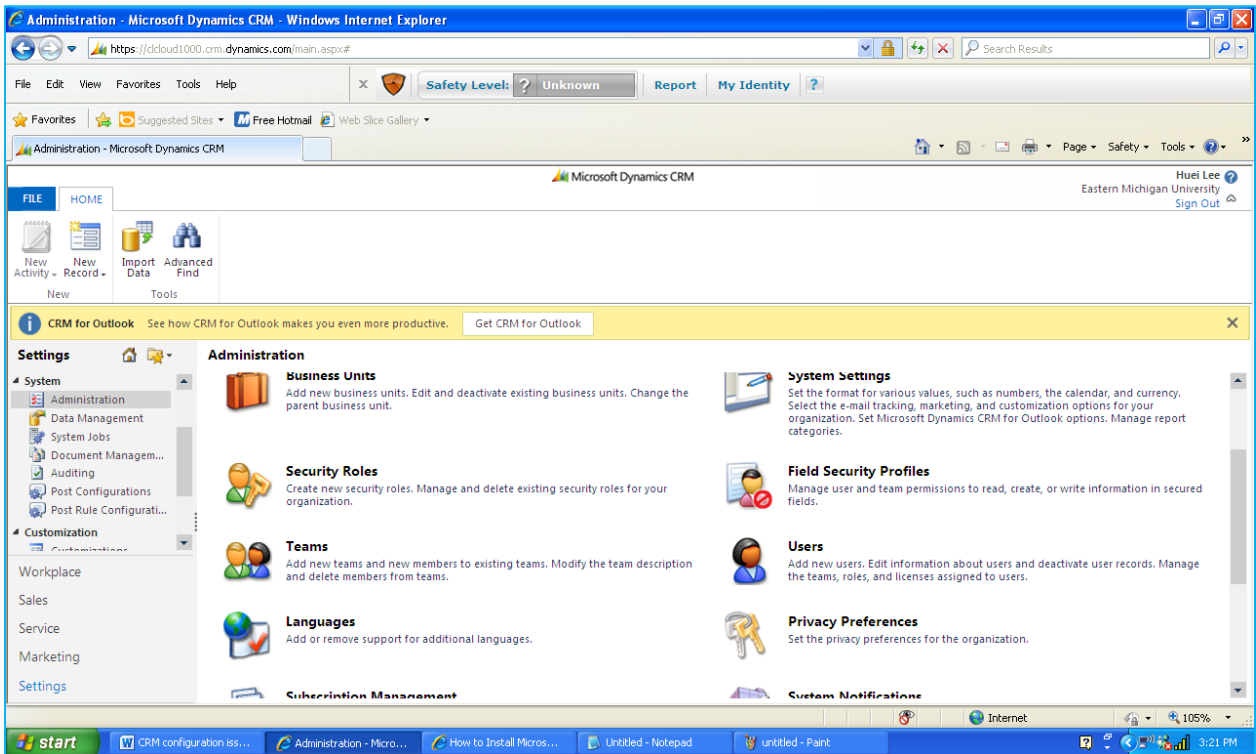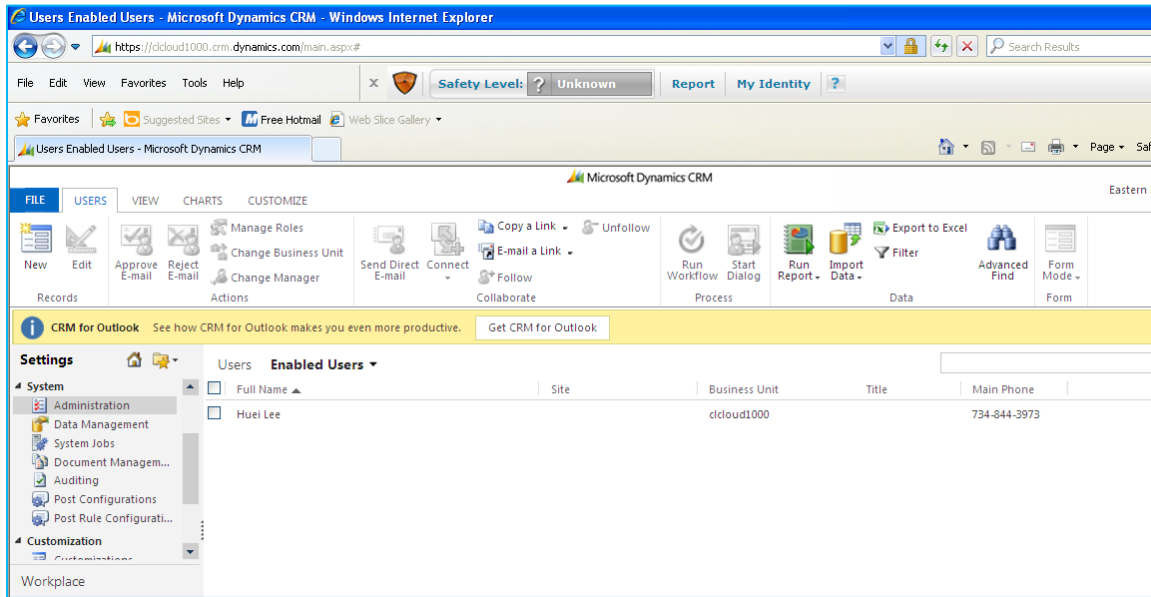
Click Setting in the main menu:

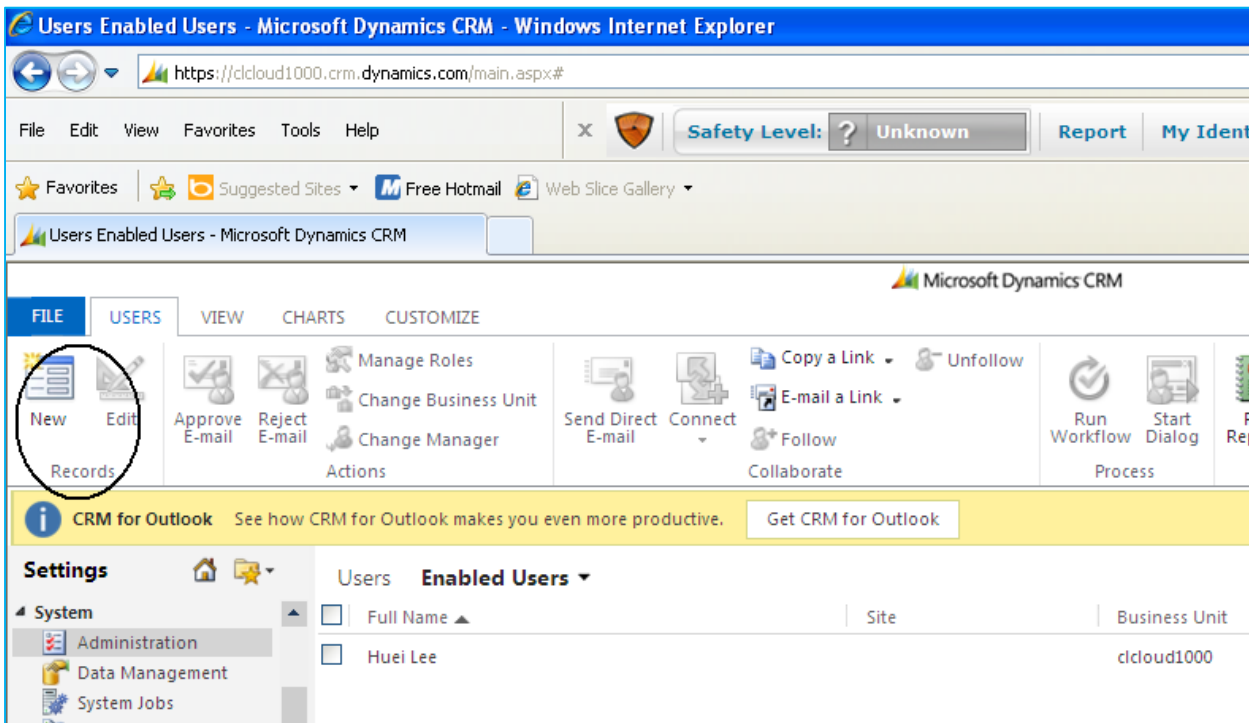
Click the administration on the submenu:
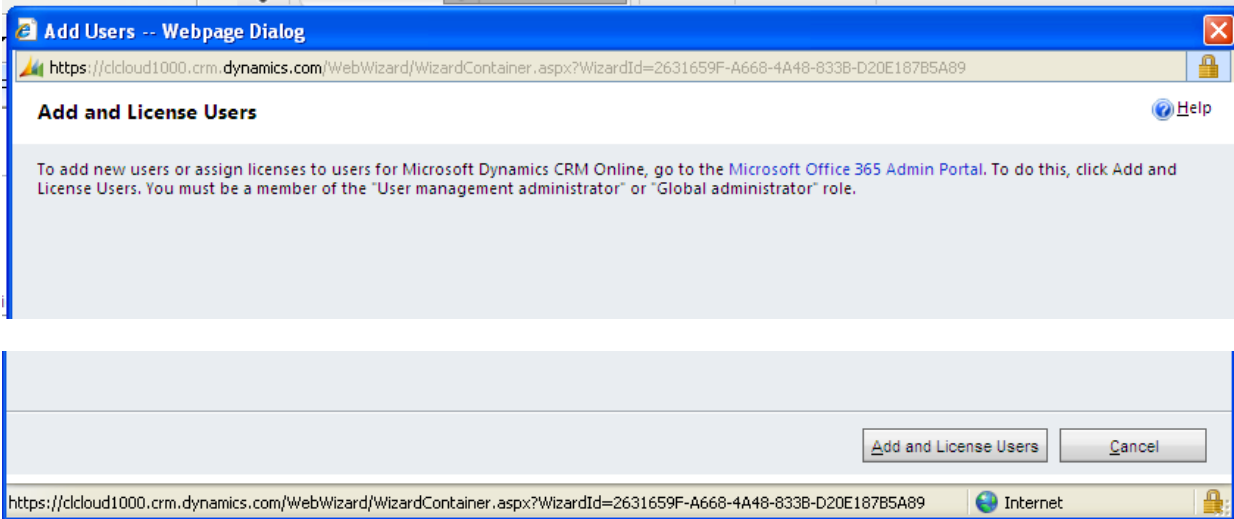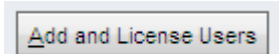
Click Administration in the submenu:

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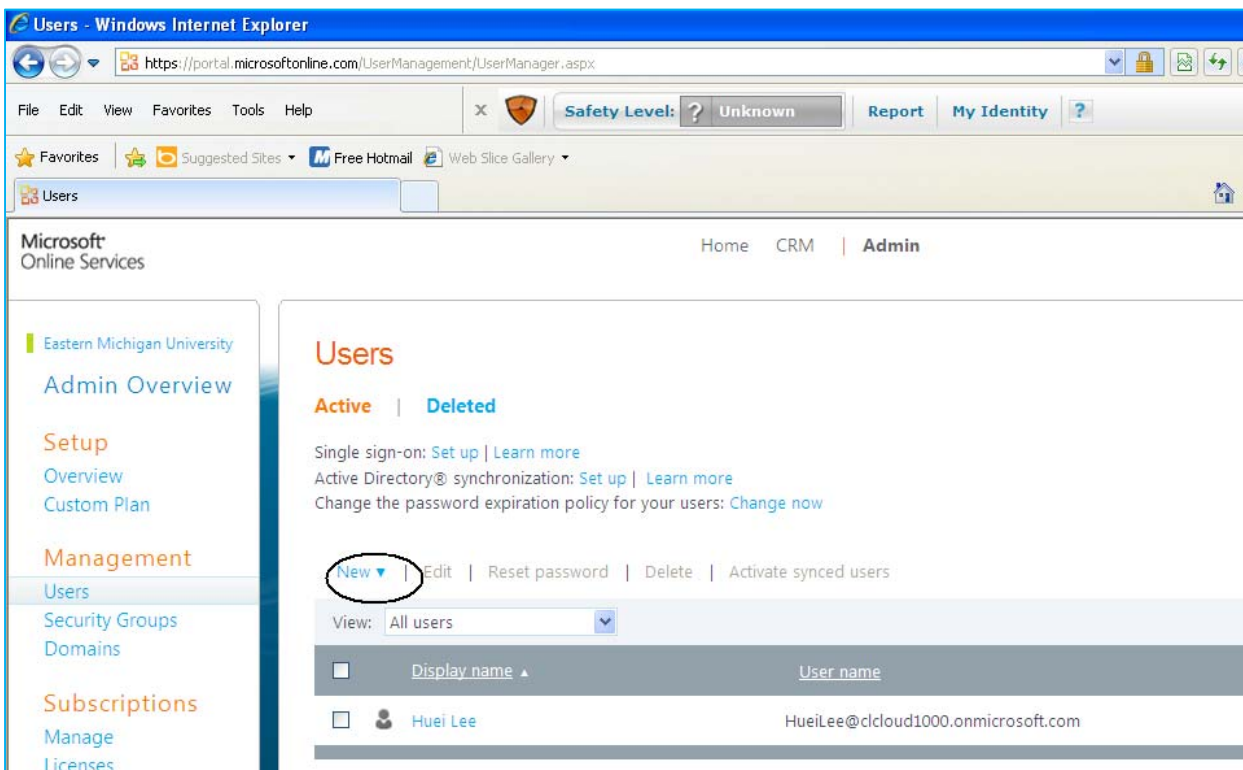

Click New in the following screen:

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

Dropdown New in the above screen, the following screen will appear:
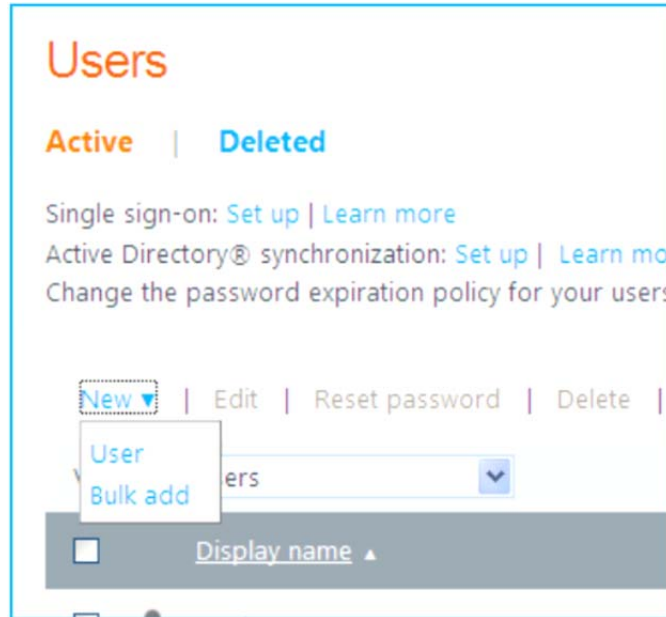
Choose User and the following screen will show:
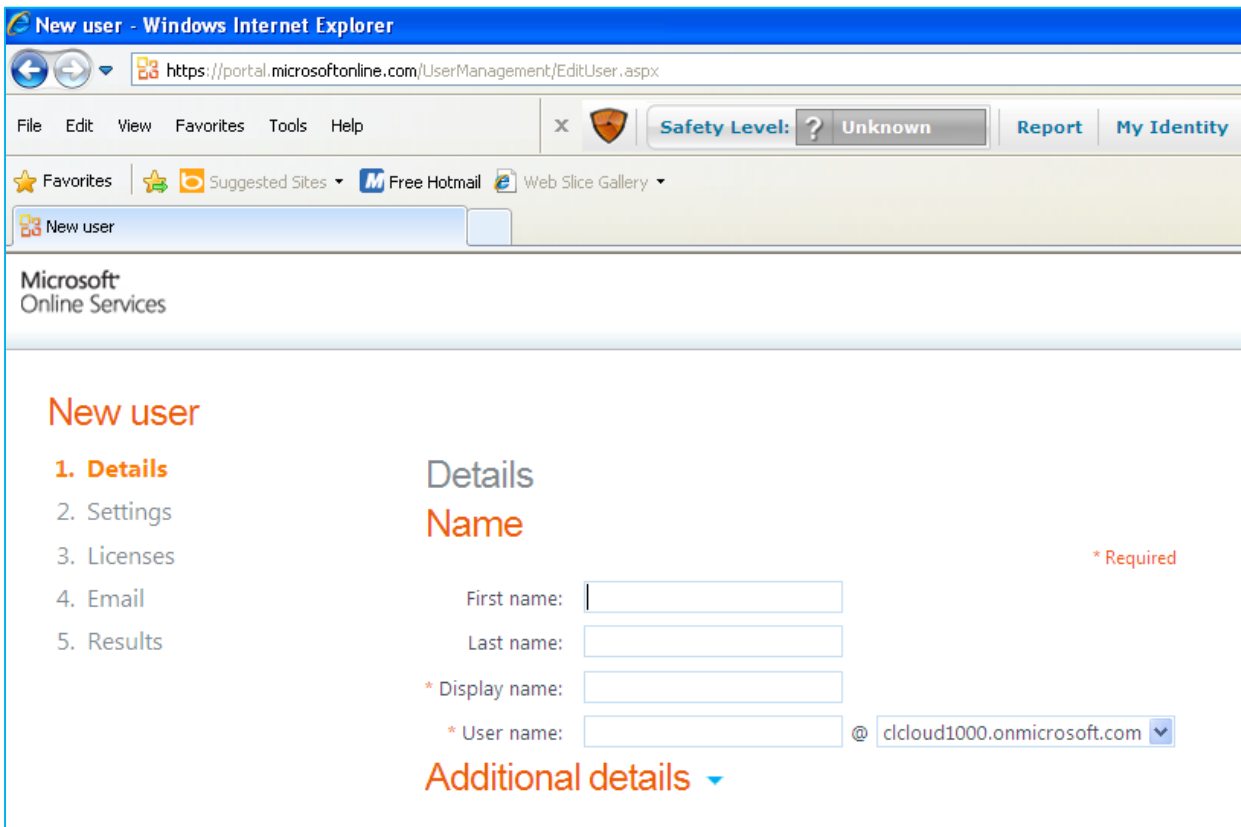
Enter the first name, last name, display name and user name such as (enter your own name)

Click Next and assign a role:

Select a role in a dropdown box.

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:

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 Setting -> Administration -> User. Can you see the person you just added?
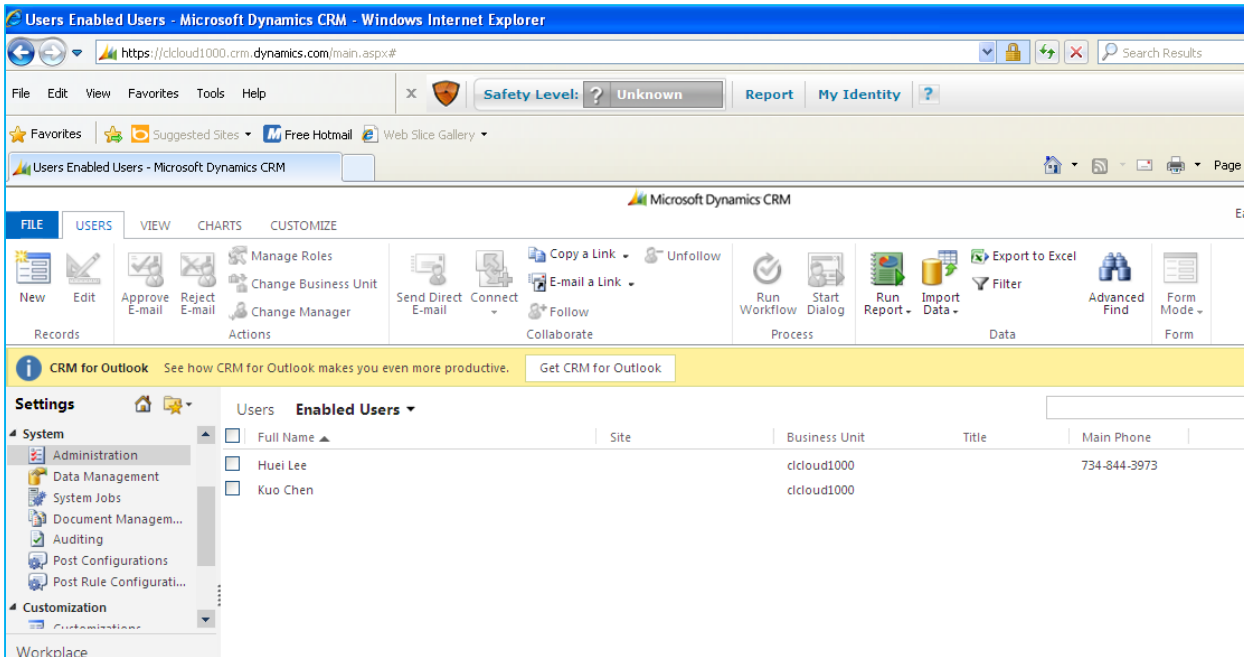
Double click the new user and see you can see the profile of the new user:
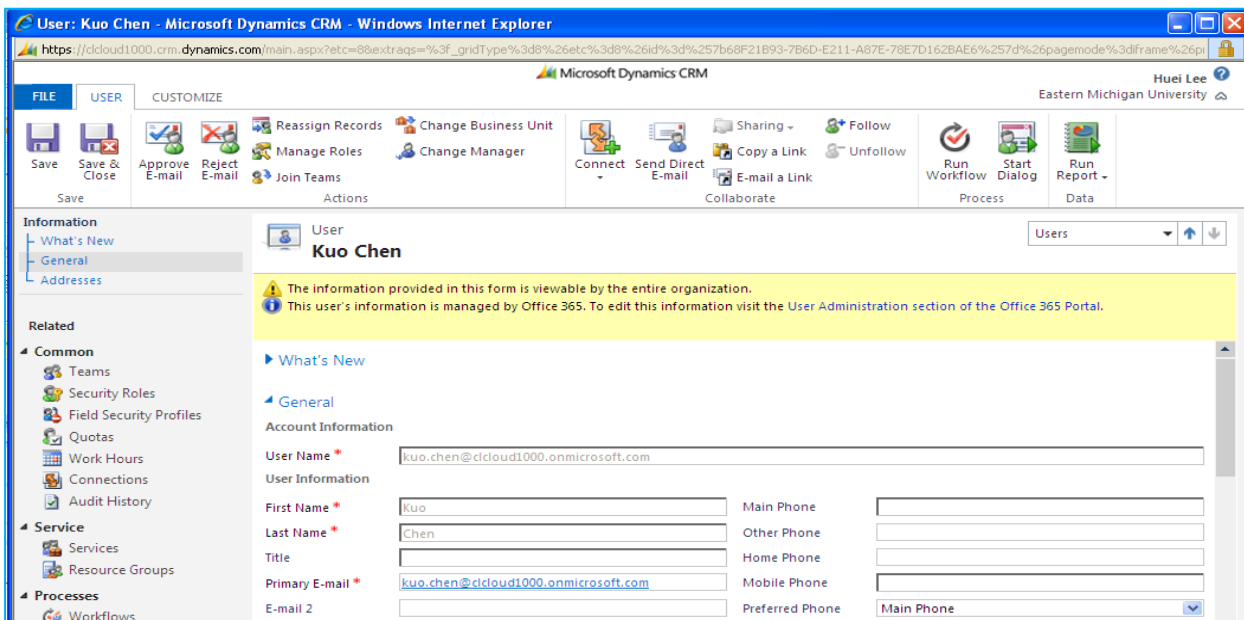
Go back to the previous screen, and click Setting -> Administration -> Security Role
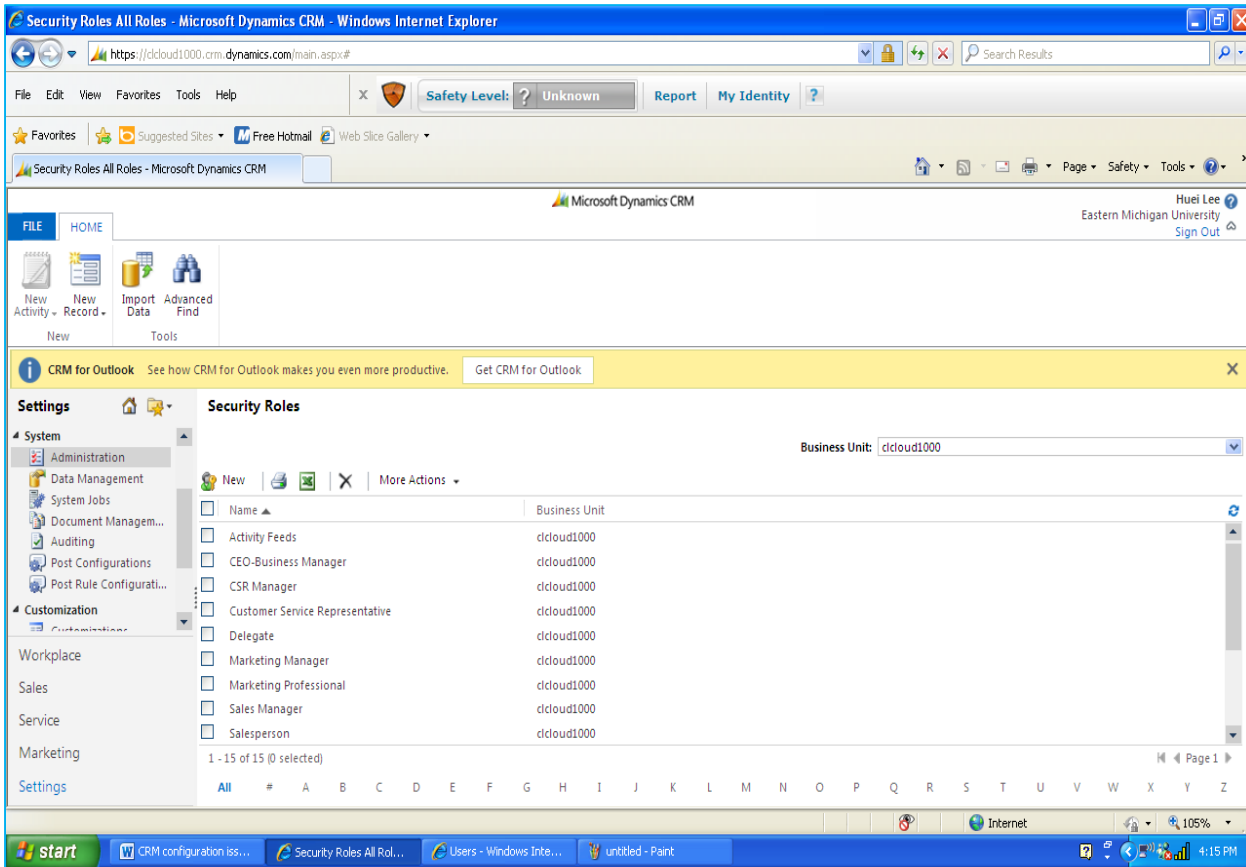
Question: List 4 security roles which are not in the above screen.

Do a print-screen and save it in the Microsoft Word.

The assignment is finished. Turn the screen shot and this assignment to the instructor.

IV. Follow-up Assignments and Assessments

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**.
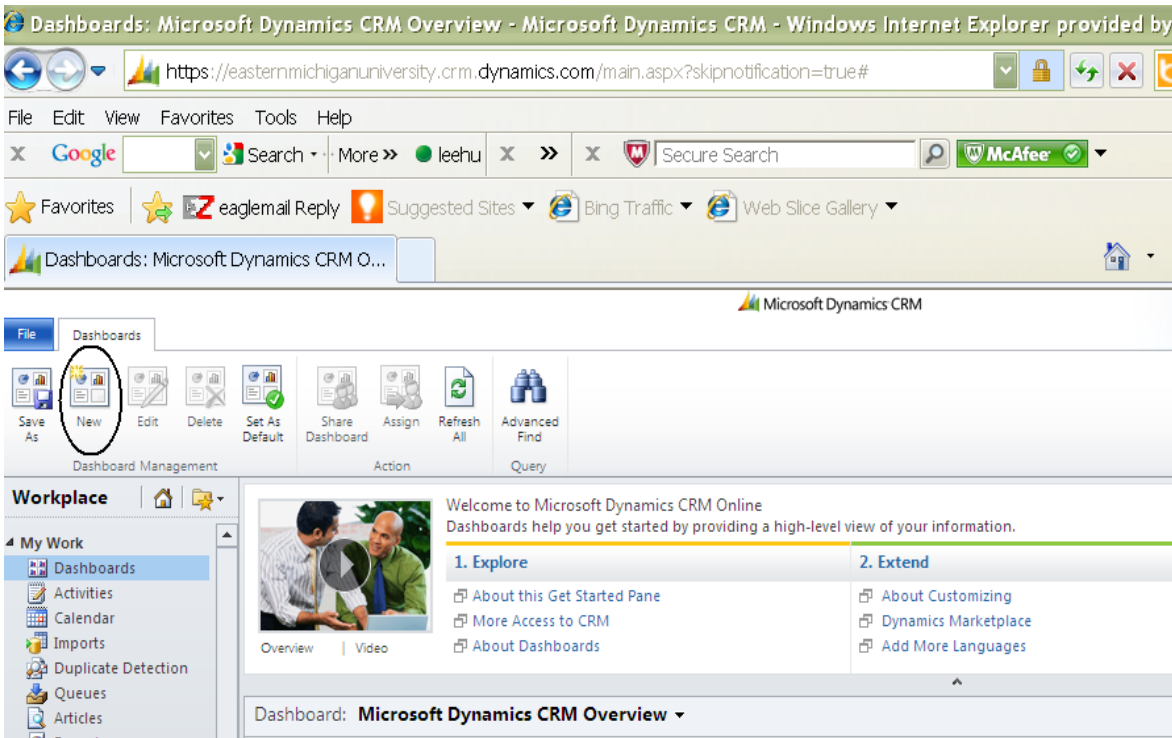
The **Dashboard Layouts** dialog box appears. The Preview area shows how the dashboard will appear with the selected layout.
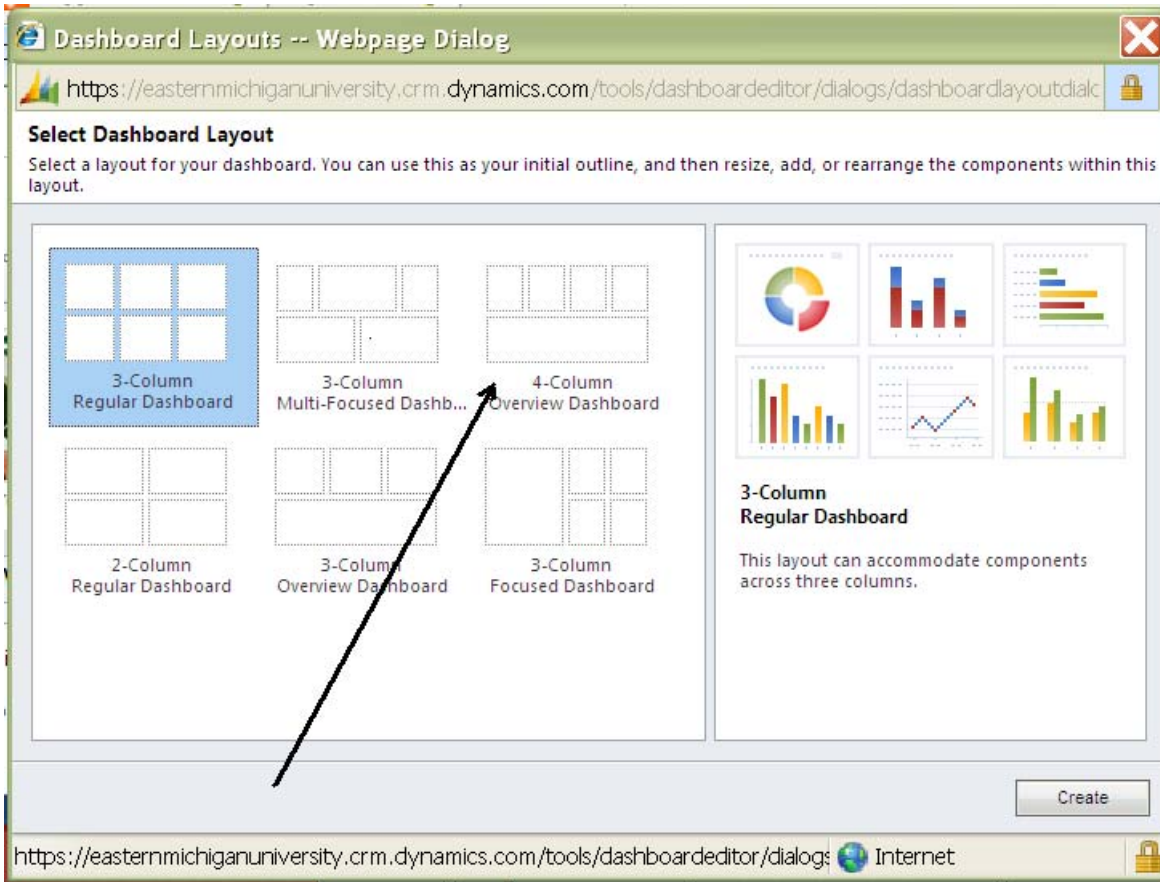
3. Select a layout: 4-Column Overview Dashboard as a starting point to design your dashboard.

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**.
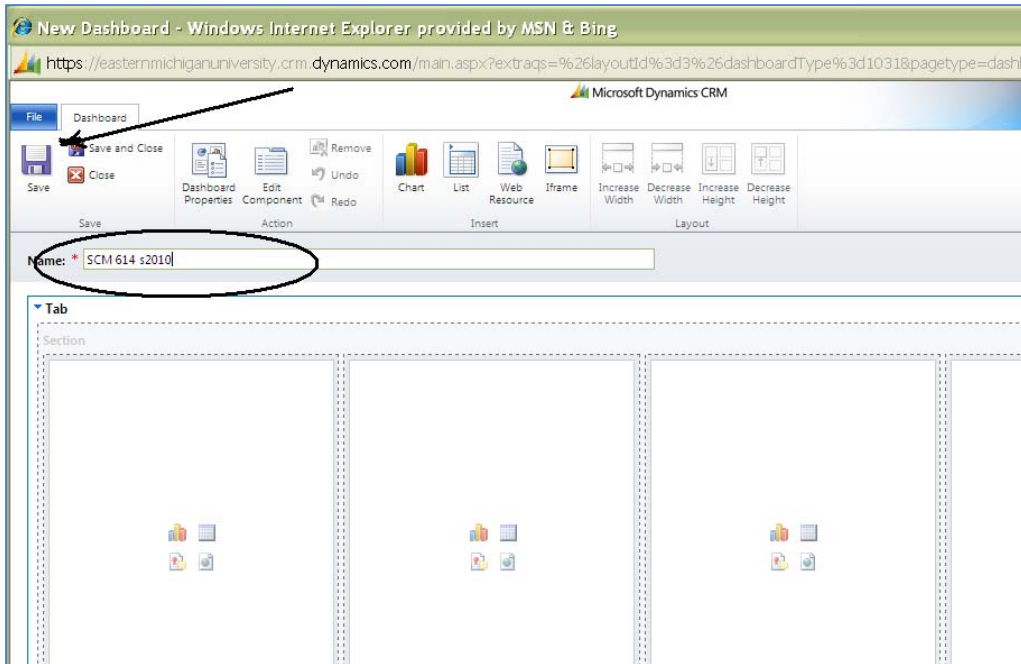
Provide a print screen for the above screen.

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 one screen shot to prove that you have watched the video.

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

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

4. How does Microsoft 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 next page

		Strongly Disagree					Strongly 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 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

REFERENCES

_____, Microsoft Dynamics CRM Handouts (2011) distributed in 2012 Preconference of the Microsoft Dynamics Academic Alliance, Houston, TX, March 2012.

Kao, F., Chen, K., & Lee, H, (2012). The impact of video-clip instructions on perceived ease of use and perceived usefulness of customer relationship management (CRM) software, *Journal of Integrated Enterprise Systems*, 1(1).

Microsoft Dynamics CRM (2013). Retrieved January 1 30 from http://crm.dynamics.com.

Microsoft TechNet (2011). *How to Install Microsoft Dynamics CRM 2011*, Retrieve from
http://social.technet.microsoft.com/wiki/contents/articles/3176.how-to-install-microsoft-dynamics-crm-2011.aspx

Topi, H., Valacich, J. S., Wright, R. T., Kaiser, K. M., Nunamaker, Jr, J. F., Sipior, J. C., de Vreede, G. J. (2010) *2010 Curriculum Guidelines for Undergraduate Degree Programs in Information System,* Retrieved January 25, 2013 from http://
http://www.acm.org/education/curricula/IS%202010%20ACM%20final.pdf