# Microsoft Dynamics CRM License and Permit Compliance process demo script

## Using the Public Sector License and Permit Compliance processes in Microsoft Dynamics CRM 2013
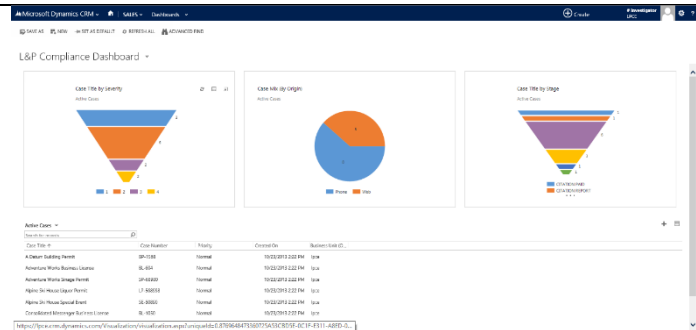
### Items of note:

- For this demo, recommended users are:
- Budget Office Auditor - boa@LPCE.onmicrosoft.com
- Auditor - auditor@LPCE.onmicrosoft.com
- Accountant - accountant@LPCE.onmicrosoft.com
- Investigator - investigator@LPCE.onmicrosoft.com
- Police Officer - policeofficer@LPCE.onmicrosoft.com
- The password for all users is: pass@word1
- When logging in, do no check "remember password"
- You will need to log out and re-login when moving from one user to another
- For this demo, I would recommend the users:
  - Auditor
  - Police Officer
  - Budget Office Auditor
- You will need at least four users to get through a complete process; Auditor or Investigator, Budget Office Auditor, Accountant and Police Officer.

### What to Show

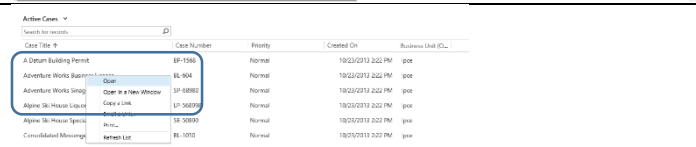- Start the demo from the L&P Compliance Dashboard

| What to Say | What to Do | Screen shot |
|---|---|---|

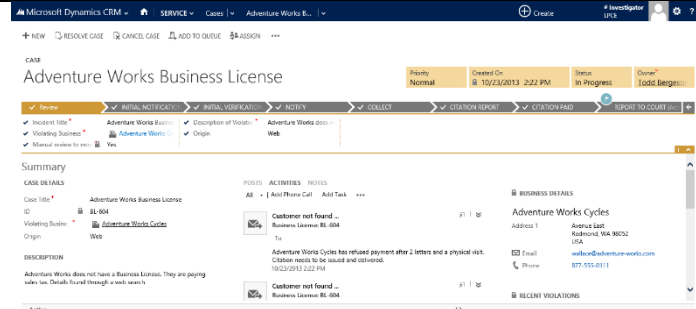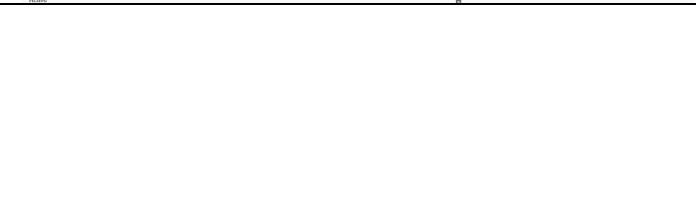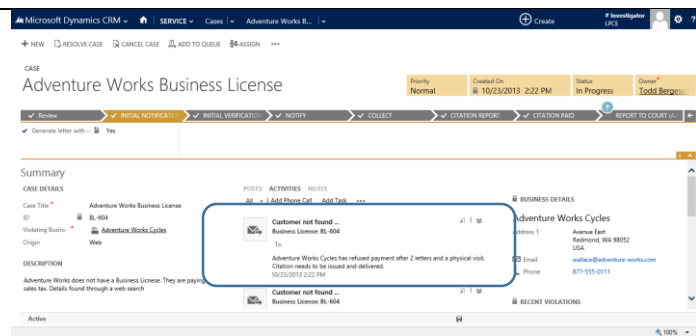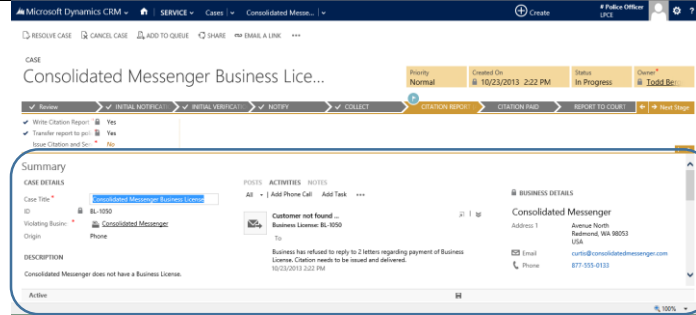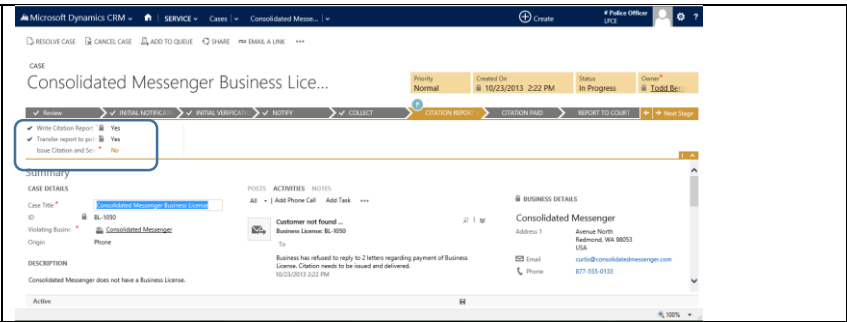| | | |
|---|---|---|
| From the L&P Compliance Dashboard the Investigator has a graphical view of the active cases and assigned tasks. Plus a listing of all active cases. | |  |
| Let's take a look at a case that has gone through the entire process | Right click on Adventure Works Business License |  |
| Here we see a case that has gone to court and is ready to mark activities complete. But First let's review what has happened | Click back to review |  |
| On the review step we see that Adventure Works does not have a Business License. We found that they were paying Sales tax. | | |
| We see that under Activities that an email has gone to the police requesting that a citation needs to be issued; two letters have been sent and a physical visit. Notice that as we click on various tasks that we have the lock next to the field. This means that someone else (another role) is responsible for updates to this field | Click on Notification |  |
| Continue to click on the various steps explaining what has happened in each | | |
| Let's now look at the Police Officer role and select Consolidated Messenger Business License. Let's review the summary information to get an understanding of what has happened. | |  |

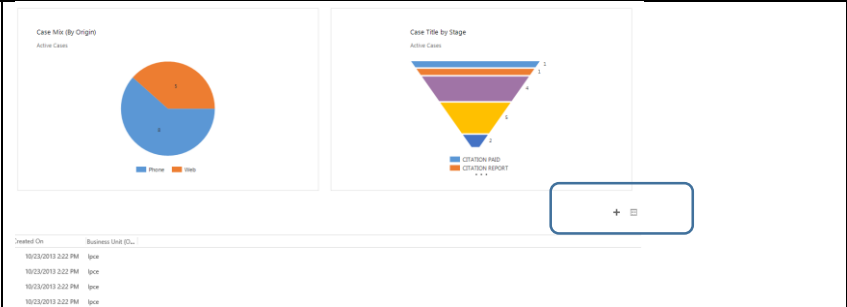| | | |
|---|---|---|
| As the Police Officer he is the only one that can update the field "Issue Citation and send to Business. | Change the value to yes and advance to the next step |  |

From here the accountant would need to verify if payment has been made.  If not, then it would move on to court.

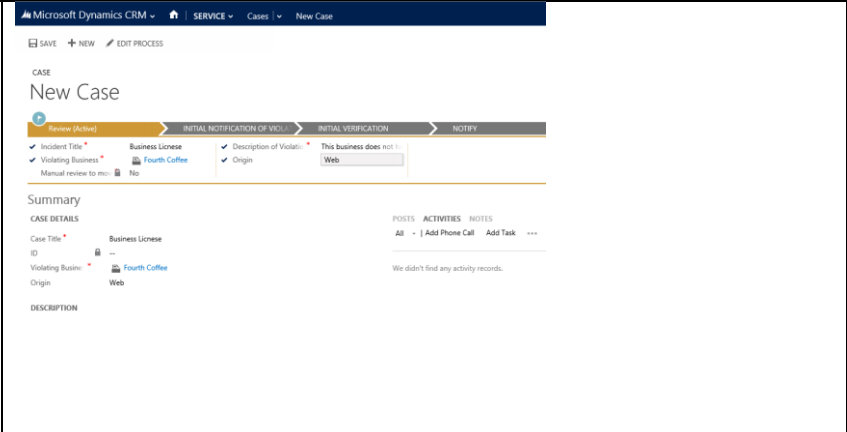| | | |
|---|---|---|
| Let's look at creating a new issue.  By simply click on the "plus" sign I can create a new incident. | Go back to the dashboard for the user "Auditor" and click on the plus |  |

You will need to logo out of the Police Officer role and log back in as the Budget Officer role to continue.
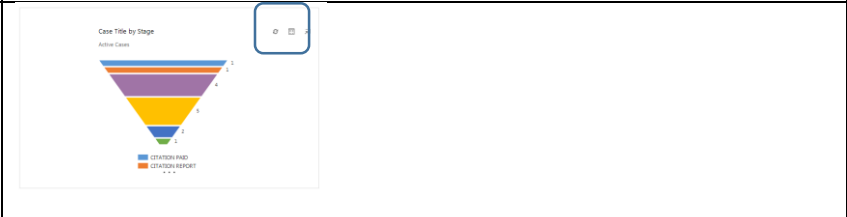
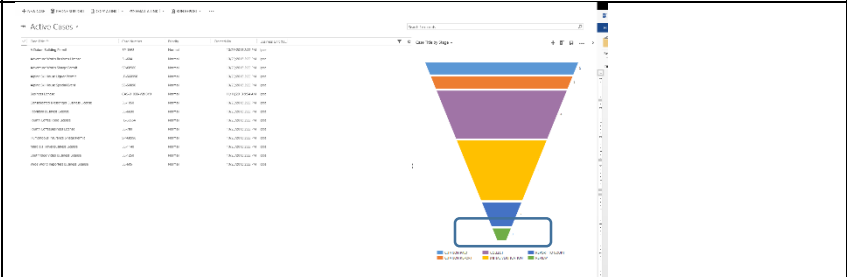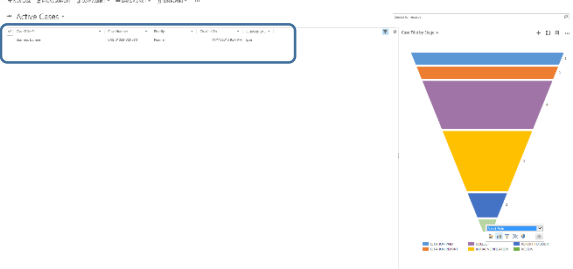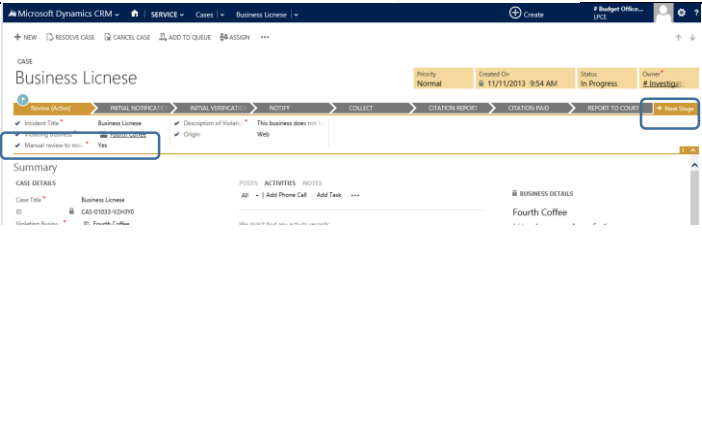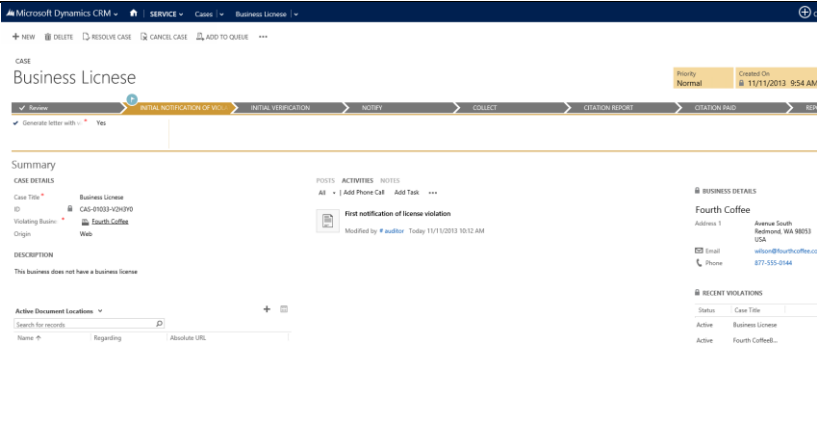| | | |
|---|---|---|
| In this case the investigator noticed a plumbing van parked across the street.<br><br>We will give this case a title and assign it to a violating business.  If the business does not exist, then it can be added on the fly. | Enter the Incident Title, Business (look up or create a new one), description, and origin (not necessary).  Make sure that you emphasis that the Origin is not a required field.<br><br>Save the record and move to the Budget Officer Auditor role |  |
| For this process, the investigator cannot move to the next step because it needs to be verified by the Budget Office Auditor | Click on the table in the "Case Title by Stage" graph. |  |
| I can see that there is one case that needs to be reviewed.  By clicking on it, I see the case that was just created. | Click on the bottom bar of the chart. |  |

| | | |
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| By clicking on it, I see the case that was just created. | Click on this case |  |
| In my role as Budget Officer Auditor, I need to review this to make sure that this business is in violation before we can move forward with this process.  Notice that the Manual Review is a field that I can modify.  In this case will change it to yes. I then save and move to next stage | Click on "Manual Review" and change to yes, save and then click on Next Stage |  |
| Notice that the Budget Officer Auditor cannot change the next field | Switch roles, move to the Auditor. Go back to the case, may need to refresh screen. | |
| The auditor now generates an official letter, which is mailed to the business.

Notice that under activities, we see that it now shows a First notification of license violation letter has been sent and attached to this case. | Change the Generate letter, save and refresh the screen |  |
| In the next stage, "Initial Verification", I would need to be logged in as the Accountant. | Click Next Stage | |
| Once the accountant has verified that we have or have not received payment we move to the next stage. | Click on Notify | |
| If the payment was not received, the auditor will send out the second notification. | | |

Microsoft in Government