Microsoft Dynamics CRM Case Management process demo script

Using the Public Sector Case Management process in Microsoft Dynamics CRM 2013

Login

For this demo, recommended users are:

- Case worker <u>caseworker@CityofMaple123.onmicrosoft.com</u>
- Case manager <u>casemanager@CityofMaple123.onmicrosoft.com</u>

Item of note:

- 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

What to Show

• Start the demo from the Case Management Dashboard

What to Say	What to Do	Screen shot
From the Case Management Dashboard the Leader (manager) and/or worker has a graphical view of the active	Log in as the Case Manager	Ablocod Domina (RM) ● (Inverse - Landara -) ● (Land - Reprint ●) (Care Management Dashboard + (Care Management Dashb
cases and assigned tasks. Plus a listing of all active cases.		Image: Section of the section of t
This particular case "Abuse – Estelle" is in the monitoring stage. Not the activities that have already taken place of notifying the manager to approve the assessment and plan where sent. Review the screen and the additional items in the Summary, such	From the Case Worker, list of active cases, find the Abuse – Estelle case. Right click and open the case.	Notice Note Note Other Name Other Name Other Name Office Offic

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as KB articles (links out to					
SharePoint).					
Notice that the case worker	Click on Create and Establish	Ja Microsoft Dynamics CRM + ♠ SURVICE + Cars + Abars - bidle + + new Dynamics CRM + ♠ SURVICE + Cars + Abars - bidle + + new Dynamics B concluses Aparon ones ∯Abaron			
has completed the necessary		CAL * Alburge Facture Batter Dave*			
tasks in each of these steps.		Abuse - Estelle New Version in Progress Castal Advance			
Some of the fields have a lock					
next to them. Meaning that		Visces file average of the second file of the seco			
the manager is the only one		DESCRIPTION To care namager : waiting for your approval Entrel*in to see should by her hubberd To care namager : Active to Active the Active to Active the Active to Active Act			
that can change the values of		The micigation plan for case ¹ Abase - Exails ¹ is welling for your approxit. Our Davie 11/1/2008 IB-84.84 10/17/2003 IB-84.84			
these fields. In the instance		NB METICLES administrator account A I is Convertige force Ancione — Recommend is welding for your approval. A descented NetWork of the Section Account A I is a subscreen in welding for your approval.			
of "Review assessment and		9 			
approve", the manager needs					
to say change this field before					
moving on to the "Establish					
plan" step.					
You can see from the case	Switch to the case manager	A Microsoft Dynamics CRM = 🕅 STRVICE = Cares = Abuse - Enelle = 💮 Create Coy of Male P Coy of			
manager that this same field	role	+мам ∰ошта Съязона сна Джоото слав ++ и			
does not show the lock.		Abuse - Estelle Provy Created On Revolution States Owner Case Works			
		Constrained and the second and			
		General Control Contro			
		Or # A 609 Cattern ret toad _			
Let's take a look at the total	Switch back to the case				
process. Creating a new case.	worker dashboard. Then	Case Management Dashboard 👻			
	click on the plus sign in the	to follow up with Rand Wate schedule L. ✓ Only Nex. 105/2012 Int Mixine up with Rand Wate schedule L. ✓ Only Nex. 105/2012			
	upper right corner of the	Exer titeler and and a second at a second			
	active cases	1-1#18 H (hgs1)			
		Attive Care v Send to monos D Care files 4 Care files (Care files (Ca			
		Abuse-Abaham A-685 Normal 102/2020 3:55 PM cityotmopic 123 Abuse-Enteller A-689 Normal 102/2020 3:55 PM objecting/is 123			
		Above - Non A 091 Normal 102/2021 335 PM dip-dip-log/413 Above - Nita A-0990 Normal 102/2021 325 PM dip-dip-log/413			
As you can see the case	Complete the create step				
worker is guided through the	through notify case manager.				
process step by step, which	Then save and refresh the				
fields are required.	screen.				
Notice now that an email has	Under activities an email				
been seen to the manager	should show up				
letting him know that the					
case needs approval of the					
assessment.					
If I open up the case I just	Switch to the manager and				
created, the manager reviews	open the case you just				
the assessment and approves.	created. Click on yes for the				
Then advances the case to	Review assessment and				
the next stage.	approve. Save and refresh				
Notice an email has been sent	Switch back to the case				
to the case worker letting him	worker				
know that the assessment has					
been approved.					
	he case swithing from case wor	ker to case manager			
Continue this process through the case, swithing from case worker to case manager					

As you can see as we		
continue through the process		
the case worker is able to		
keep track of where he is in		
the process, while everyone		
has been notified at various		
stages. This notification		
process has been built into		
this example, but can be		
adjusted to meet your		
specific needs.		