# Microsoft Dynamics CRM Grant Management process demo script

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

### Items of note:

- For this demo, recommended users are:
- Grant Manager grantmanager@grantmanagement607.onmicrosoft.com
- Grant Reviewer grantreviewer@grantmanagement607.onmicrosoft.com
- Accountant <u>accountantone@grantmanagement607.onmicrosoft.com</u>
- 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

- Log in as the Grant Manager and Grant Reviewer
- Start the demo from the Grant Management Dashboard

What to Say	What to Do	Screen shot	
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approved.		• • • • • • • • • • • • • • • • • • •	H ( Page 1 )

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Let's take a look at a particular eligibility category	Click on the table icon ( ) in the upper right of the first	Mutcrosoft Dynamics CRM
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	Created On	
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	find the one	
	you just	
	created.	
You can see	Change	/// Microsoft Dynamics CRM v 📅   WORKPLACE v Grants/Applications   v Low income housing   v 🕀 Create grantmanagement 🔍 🌣 ?
that as the	"Under	🗘 RESOLVE CASE 🗜 CANCEL CASE 📮 ADD TO QUEUE 🗍 ASSIGN 🗘 SHARE 🚥
Grant	Review" and	GRANT/APPLICATION : CASE *
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now change	Step	CREATE CREATE Verify SCORE Award MONITOR CLOSE
the field to let		V Beciewer Actioned B Ver
everyone know		Summary
, that I am		Overview         POSTS         ACTIVITIES         NOTES           Title *         Low income housing         All +   Add Phone Call         Add Task         Image: Customer Details
reviewing the		Funding Activity * 🔒 Housing Customer not found A. Datum Corporation (sample)
grant. Also		Narrative     Grant to be awarded for the building of additional low income housing in the downtown area     Image: Comparison of the downtown area     Image: Comparison of the downtown area     Image: Comparison of the downtown area       You are assigned to review new application     Vou are assigned to review new application     Vou are assigned to review new application     Vou are assigned to review new application
notice that an		Grantee * 🔛 A.Datum Corporation (sample) Today 11/11/2013 10:42 AM
email was sent.		<sup>©</sup> Grant Program A → Status Case Title
If email		Reviewers     +     Image: Constraint of the second
capability had		Name ↑ External Reviewer Internal Rev
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this demo, I		
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received that		
email notifying		
me to review		
the grant.		
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I can continue	Verify fields	D RESOLVE CASE D CADICEL CASE D ADD TO QUEUE \$\$ ASSIGN Q SHARE ····
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grantee was		Verify Eligability* Ves Missing Information click to enter     Verify Paperwork* Ves
missing any		Verify Resources Yes T
information, I		
would enter		
that in the		

"Missing Information" field and wait until it was received. Once received would then update and continue on to the next			
step			
During the next stage I score the Grantees and move to the next stage	Make sure to show the other grantees listed under the Summary	Image: Secore assigned to eac.*       Yes    Image: Secore assigned to eac.*          Image: Secore assigned to eac.*       Yes	
		Summary Overview POSTS ACTIVITIES NOTES Title * Low income housing All ~   Add Phone Call Add Task ***	A CUSTOMER DETAILS
In the Award stage, the Reviewer now passes it on to the Grant Manager	Refresh the Grant window		
Notice now that an email has been sent to the Grant Manager stating that all applicants have been scored	Complete the Award step except for "Sent Funds". Then refresh screen	Middrood Bynamic CRM - Image: Imag	Image: Control of Contro
			■ RECENT ACTIVITIES

Notice that I cannot change the Sent Funds field. This must be changed by the accountant or will be automatically changed through integration with Microsoft Dynamics AX. However notice now that the Grantee has received an email notifying them that they are approved, while those that did not also received notification. At this point I cannot move forward. Once the money has been sent then we move to the monitor stage