

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 - accountantone@grantmanagement607.onmicrosoft.com
- The password for all users is: pass@word1
- When logging in, do not check “remember password”
- You will need to log out and re-login when moving from one user to another


What to Show

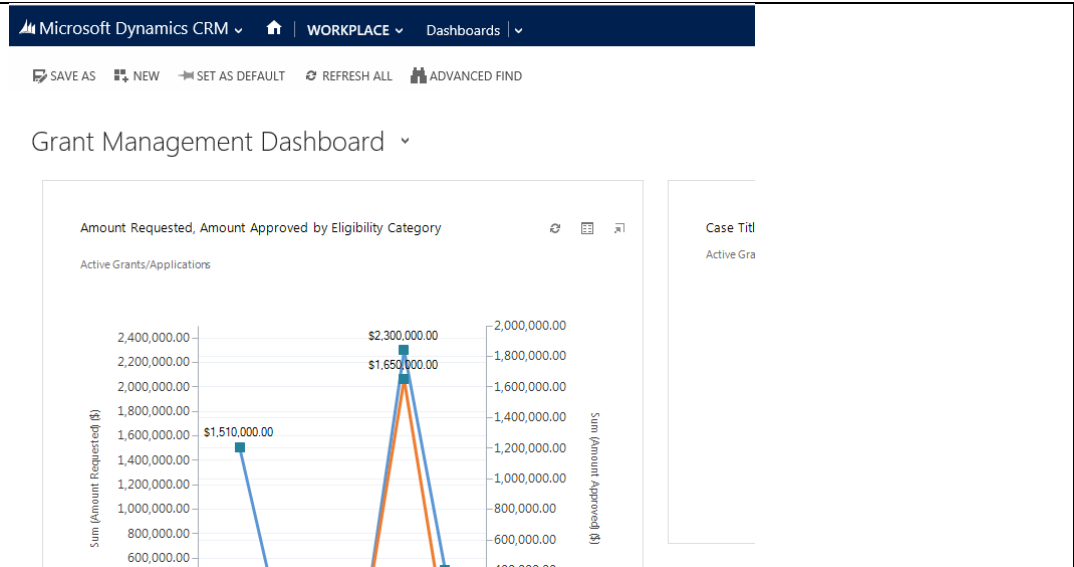
- Log in as the Grant Manager and Grant Reviewer
- Start the demo from the Grant Management Dashboard

What to Say	What to Do	Screen shot
From the Grant Management Dashboard the worker has a graphical view of the active grants, approved by eligibility, funding by category, and amount approved.		

[Type here]

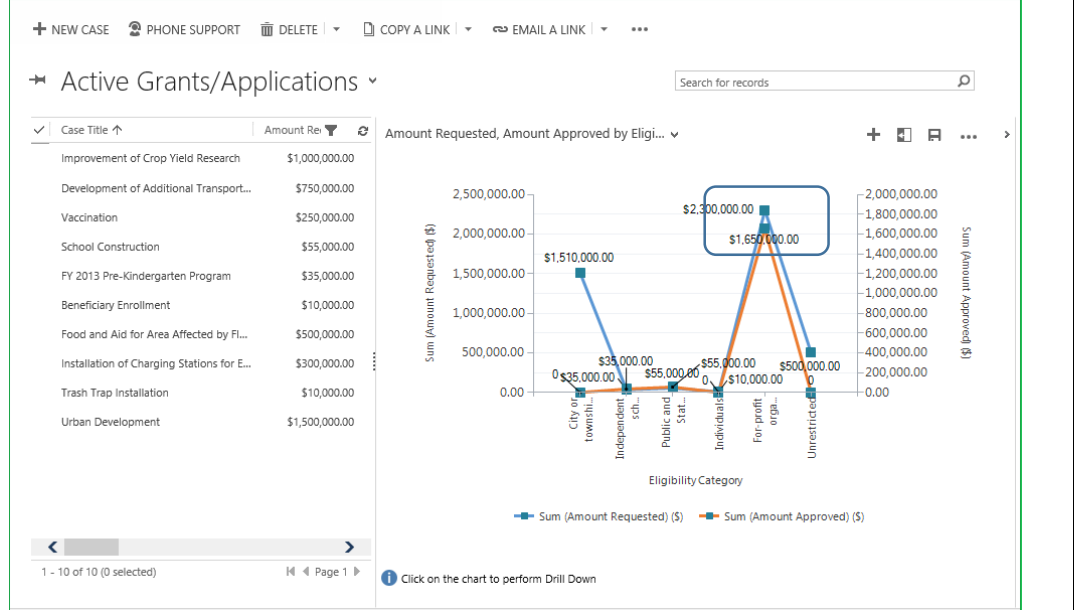
Let's take a look at a particular eligibility category

Click on the table icon () in the upper right of the first graph.



Now we have filtered the list to only grants that are being given to for profit organizations. Let's review the Development of Additional Transportation.

Click on the dot for-profit- ... org...

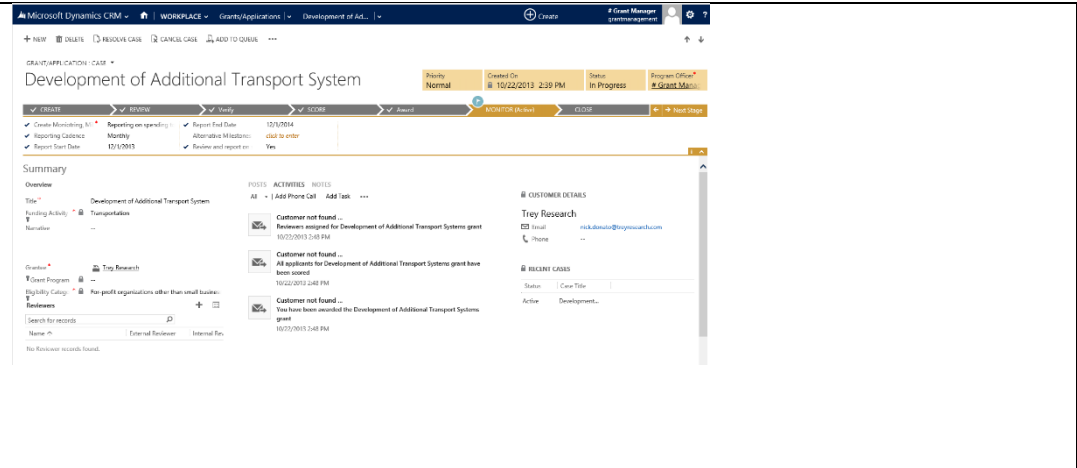
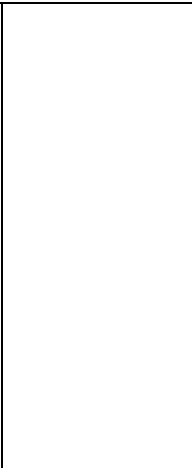


Click on Development of Additional Transport...

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Case Title	Amount Re...
Improvement of Crop Yield Research	\$1,000,000.00
Development of Additional Transport...	\$750,000.00
Vaccination	\$250,000.00
Installation of Charging Stations for E...	\$300,000.00

This particular grant is in the Monitor stage. We see that the reporting from the Grantee “Trey Research” is starting on December 1, 2013 and will end a year later.



If we slide the form down a little further you will notice that there are four other grantees that applied for this grant

Click and slide down the bar to view the lower half of the form



Let's take a look at the steps involved in creating a new grant

Close all the windows back to the Dashboard



From the dashboard, I simply click on the plus sign to create a new grant

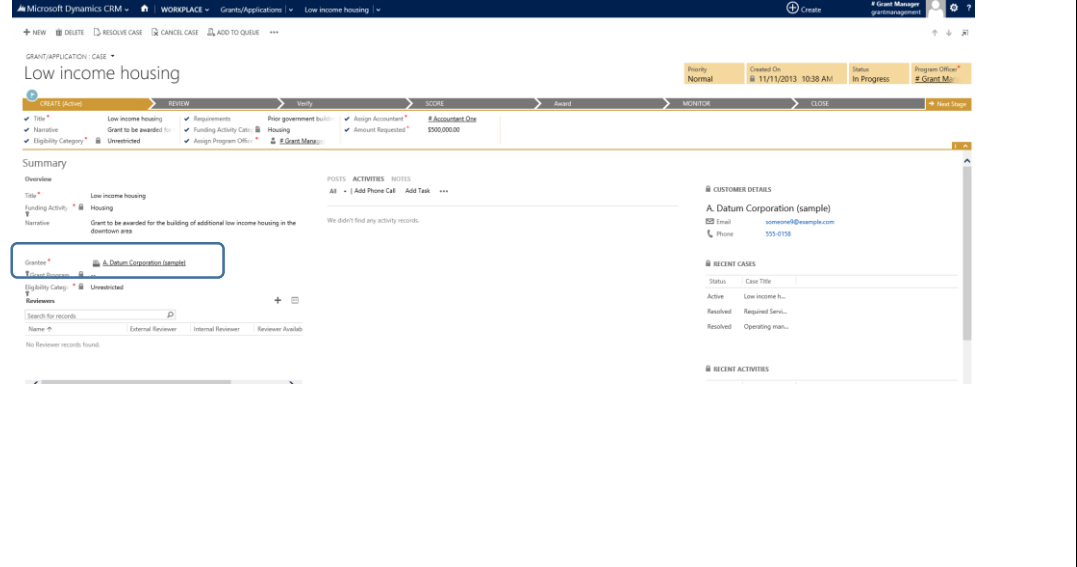
Click on the plus sign, above right of the active grants list

Active Grants/Applications


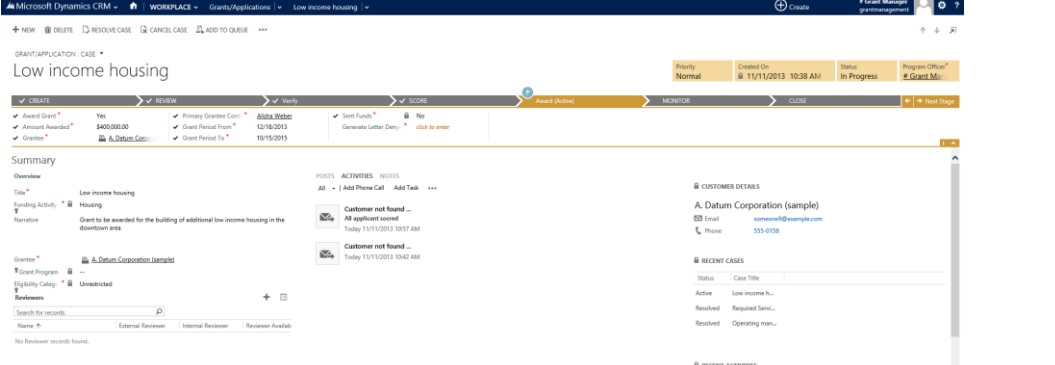
Case Title	Amount Requested	Amount Approved	Application Status	Grant Number	Is Awarded	Narrative	Created On	Perf Report: Tot...	Perf Report: Tot...	Payment
Improvement of Crop Yield Rese...	\$1,000,000.00	\$750,000.00		CAS-01059-C3H7Y9	No		10/22/2013 2...			
Development of Additional Trans...	\$750,000.00	\$700,000.00		CAS-01062-W6Y0...	No		10/22/2013 2...			
Vaccination	\$250,000.00	\$200,000.00		CAS-01057-P9J1F3	No		10/22/2013 2...			
School Construction	\$55,000.00	\$55,000.00		CAS-01054-F5D7W5	No		10/22/2013 2...			

Create a new grant. The grant manager can complete the tasks in the Create step of the process

Complete each field and click on save. Not that since this has been built of the CRM Accelerator you will need to also enter the Grantee in the Summary section.



<p>I will assign it to a reviewer</p>	<p>Click on Next Step</p> <p>Then select Yes for reviewers assigned</p>	
	<p>Switch to the Grant Reviewer, click on the table above Active Grants / Applications. Then click on Created On column to find the one you just created.</p>	
<p>You can see that as the Grant Reviewer, I can now change the field to let everyone know that I am reviewing the grant. Also notice that an email was sent. If email capability had been set up in this demo, I would have received that email notifying me to review the grant.</p>	<p>Change “Under Review” and go to Next Step</p>	
<p>As the reviewer I can continue the next step to verify the grant. If the grantee was missing any information, I would enter that in the</p>	<p>Change the Verify fields to Yes and click on next stage</p>	

<p>“Missing Information” field and wait until it was received. Once received would then update and continue on to the next step</p>		
<p>During the next stage I score the Grantees and move to the next stage</p>	<p>Make sure to show the other grantees listed under the Summary</p>	
<p>In the Award stage, the Reviewer now passes it on to the Grant Manager</p>	<p>Refresh the Grant window</p>	
<p>Notice now that an email has been sent to the Grant Manager stating that all applicants have been scored</p>	<p>Complete the Award step except for “Sent Funds”. Then refresh screen</p>	
<p>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</p>		