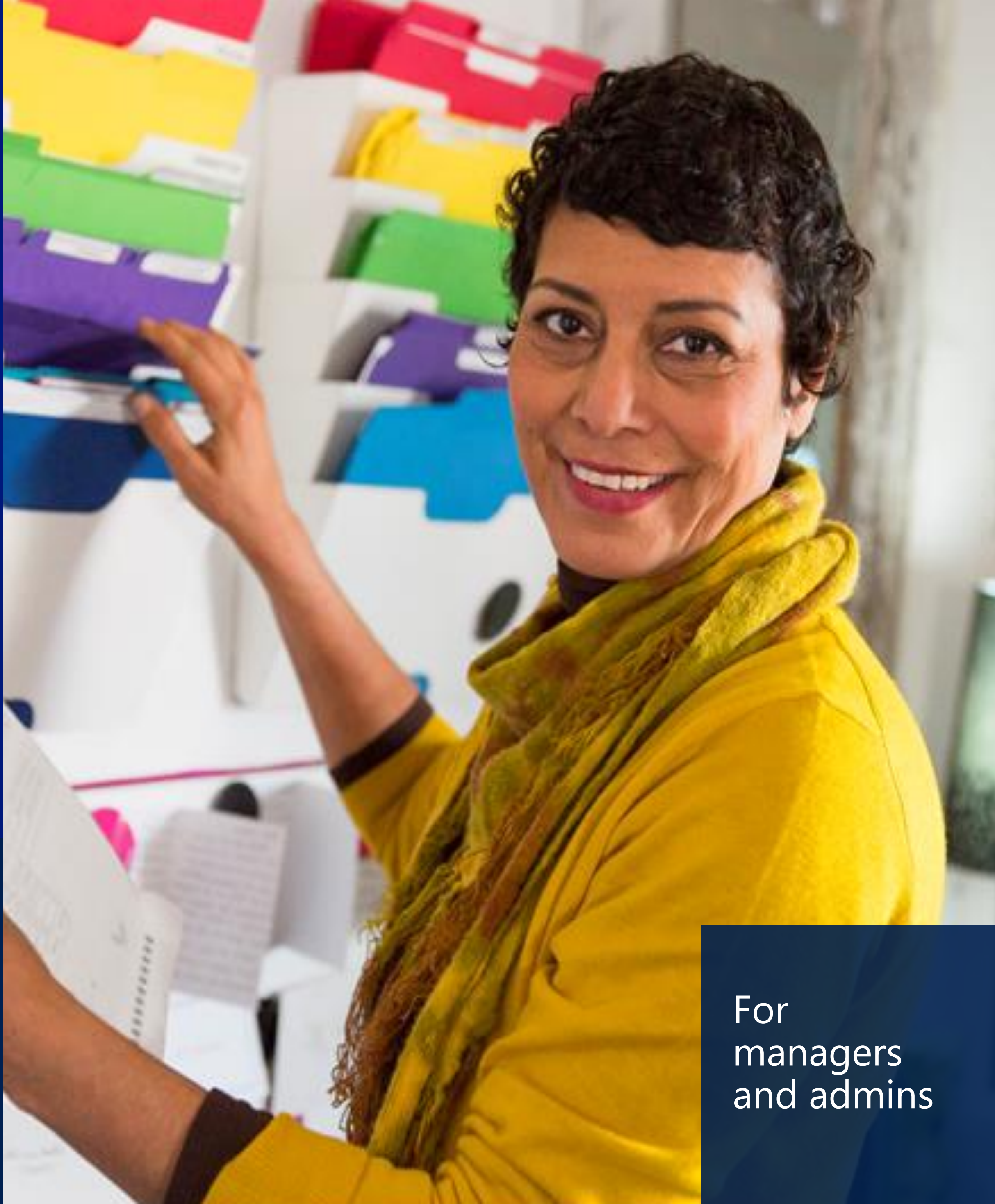
Customize a business process in CRM

Make Microsoft Dynamics CRM processes match the way your organization works

Microsoft



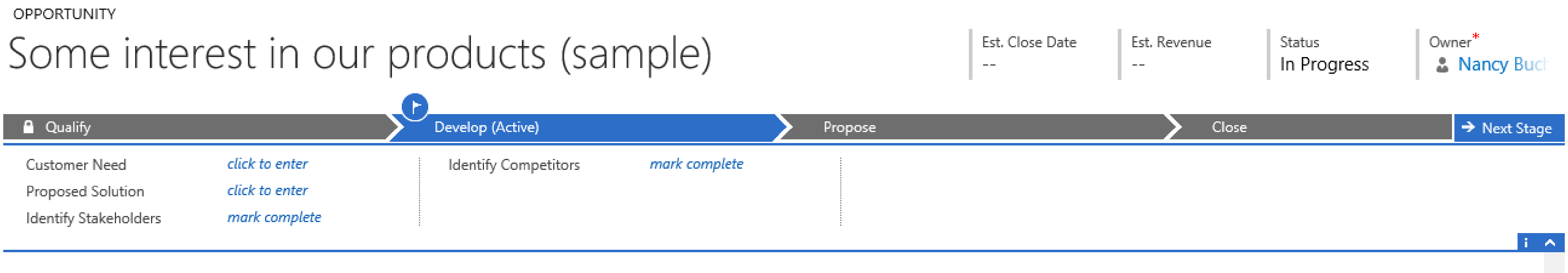
For managers and admins

contents

Provide your sales or service reps with a well-defined process to take the guesswork out of their day-to-day activities. Microsoft Dynamics CRM includes ready-to-use business processes that you can customize to match how your organization works.

Follow these steps to customize your own business process:

what is a business process?



Business processes help you and everyone on your team follow best practices by guiding you through consistent stages and steps for common tasks.

For example, your organization may want everyone to follow the same steps to qualify new sales leads or to resolve service cases.

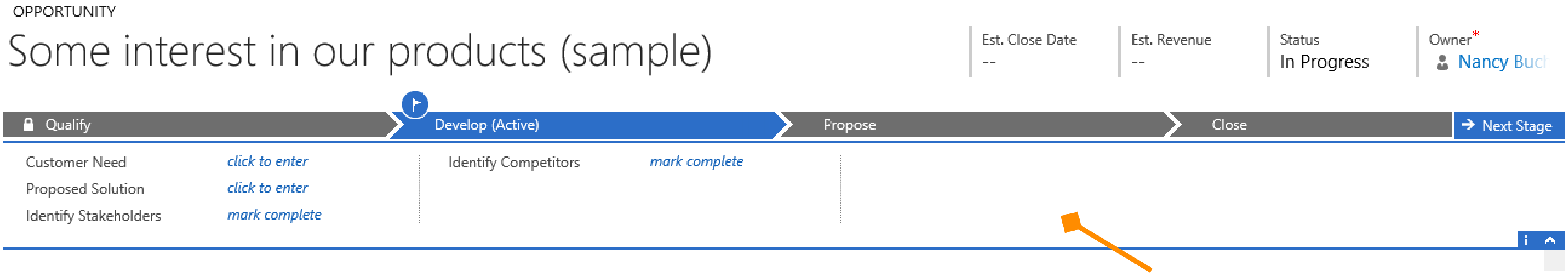
Business processes help you do that.

Note: You'll need the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions to do the tasks in this guide.

Not sure you have the right permissions?
[View your user profile]

Applies to: Microsoft Dynamics CRM Online & Microsoft Dynamics CRM 2015

see your next steps – no guesswork!



Process bar

You'll see the process bar at the top of the screen when you work on certain types of records—for example, leads or opportunities.

The process bar shows you where a customer is in the process, and the next steps you need to take. You enter necessary information and mark completed steps in the process bar as you go.

It's your roadmap for getting things done.

Want a short, visual guide that introduces business processes?
Check out the eBook: Business Processes.

adapt a process to match your business

There are several business processes available for common customer interactions, with the stages and steps already mapped out for you.

But what if you need to change a business process to make it match the way your organization does things?

This guide shows you how.

the basics of customizing a business process

The best way to learn how to customize a business process is to start with an example.

In this guide, we'll show you how to change the Lead to Opportunity Sales Process to add a stage to create a proposal for a lead.

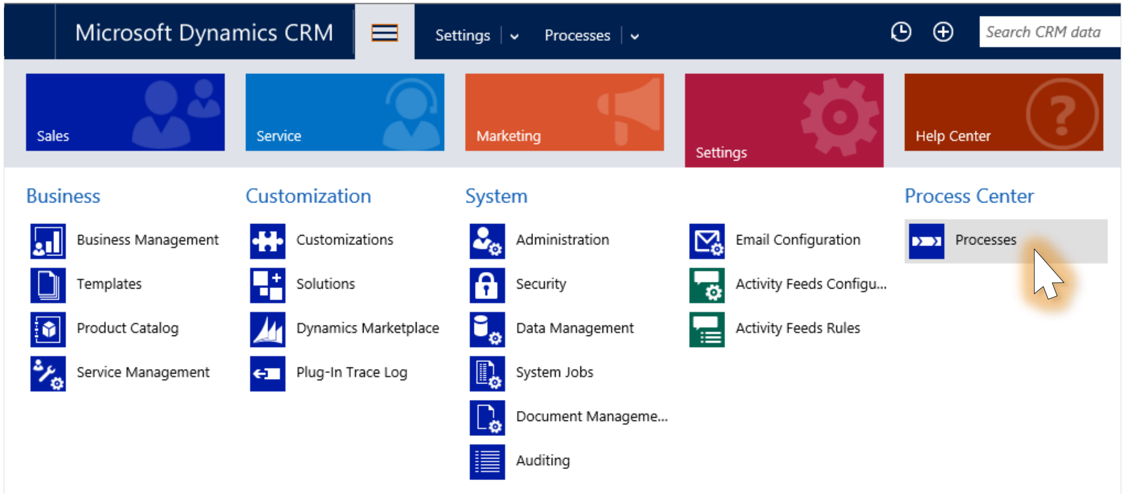
The Lead to Opportunity Sales Process is a ready-to-use process provided by CRM. It's a template you can change to match how you do business.

Let's get started!

go to the list of processes

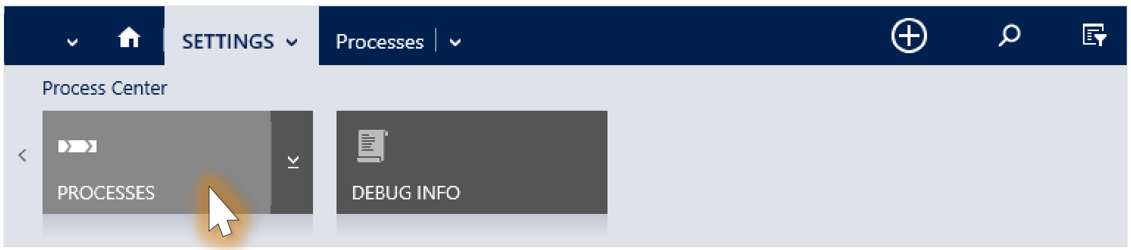
If your screen looks like this (latest version):

Go to **Settings** > **Processes**.

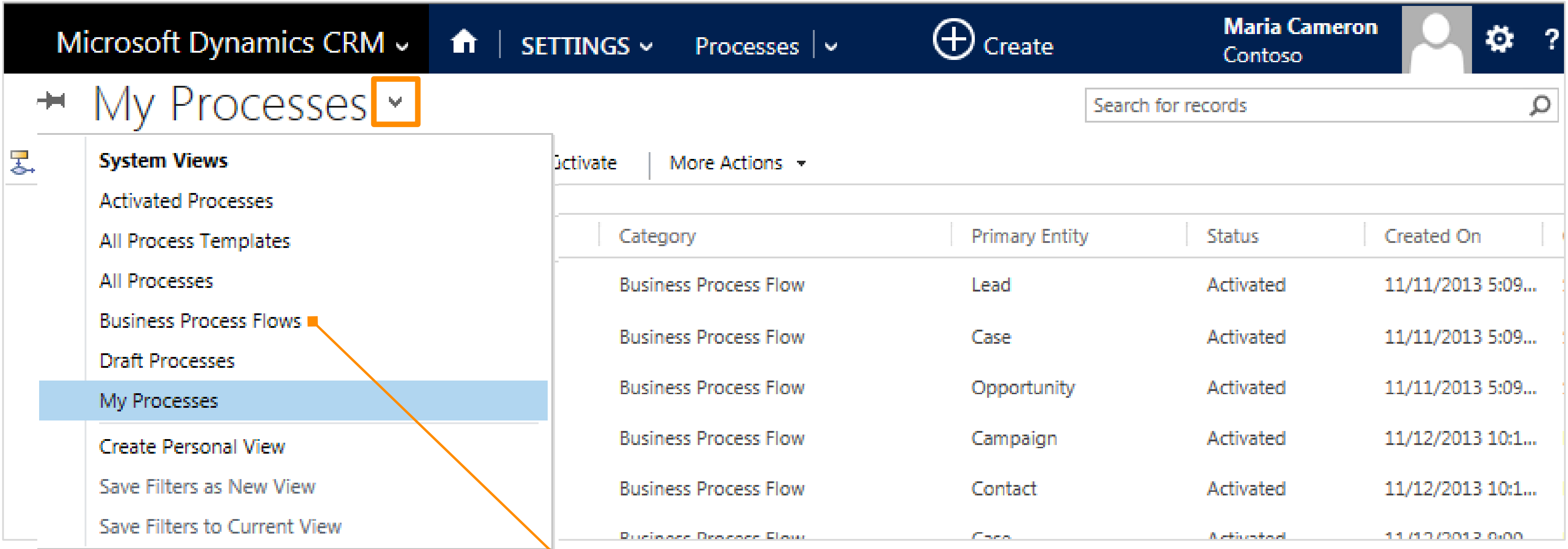


If your screen looks like this (older version):

Go to **Microsoft Dynamics CRM** > **Settings** > **Processes**.

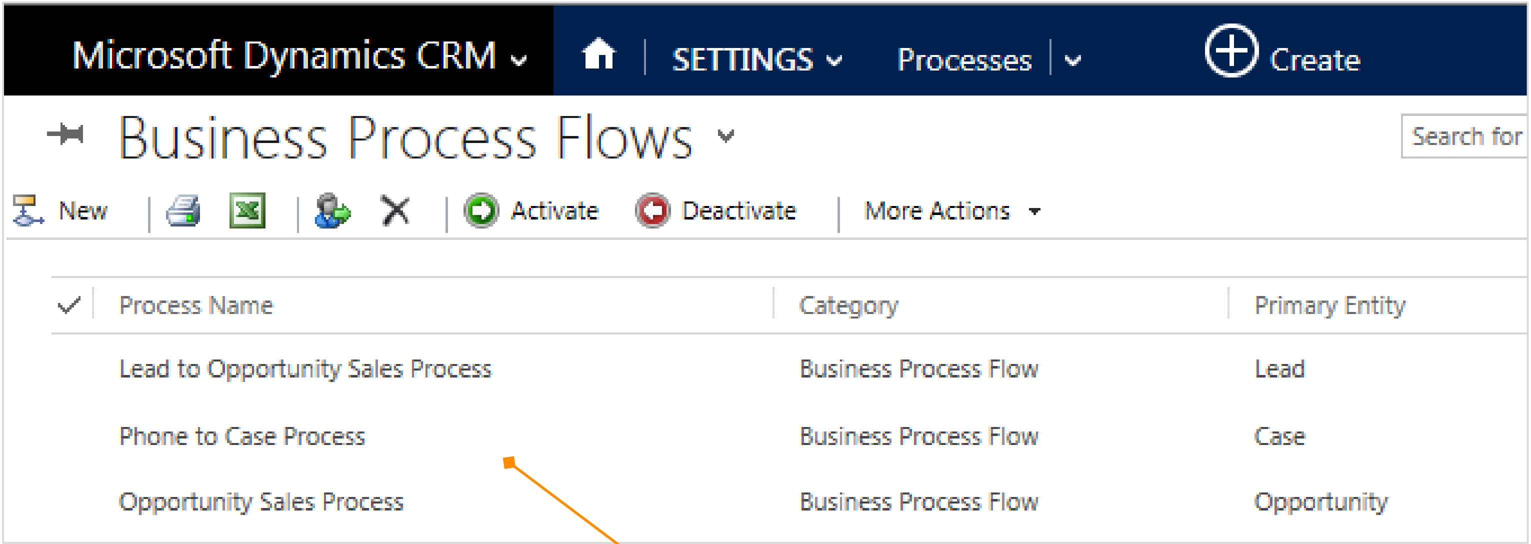


view the list of business processes



To see a list of all the business processes installed on your system, choose the arrow, and then select **Business Process Flows**.

select the business process to edit



Choose a business process in the list to look at and edit its stages and steps.

In our example, we've chosen the **Lead to Opportunity Sales** process.

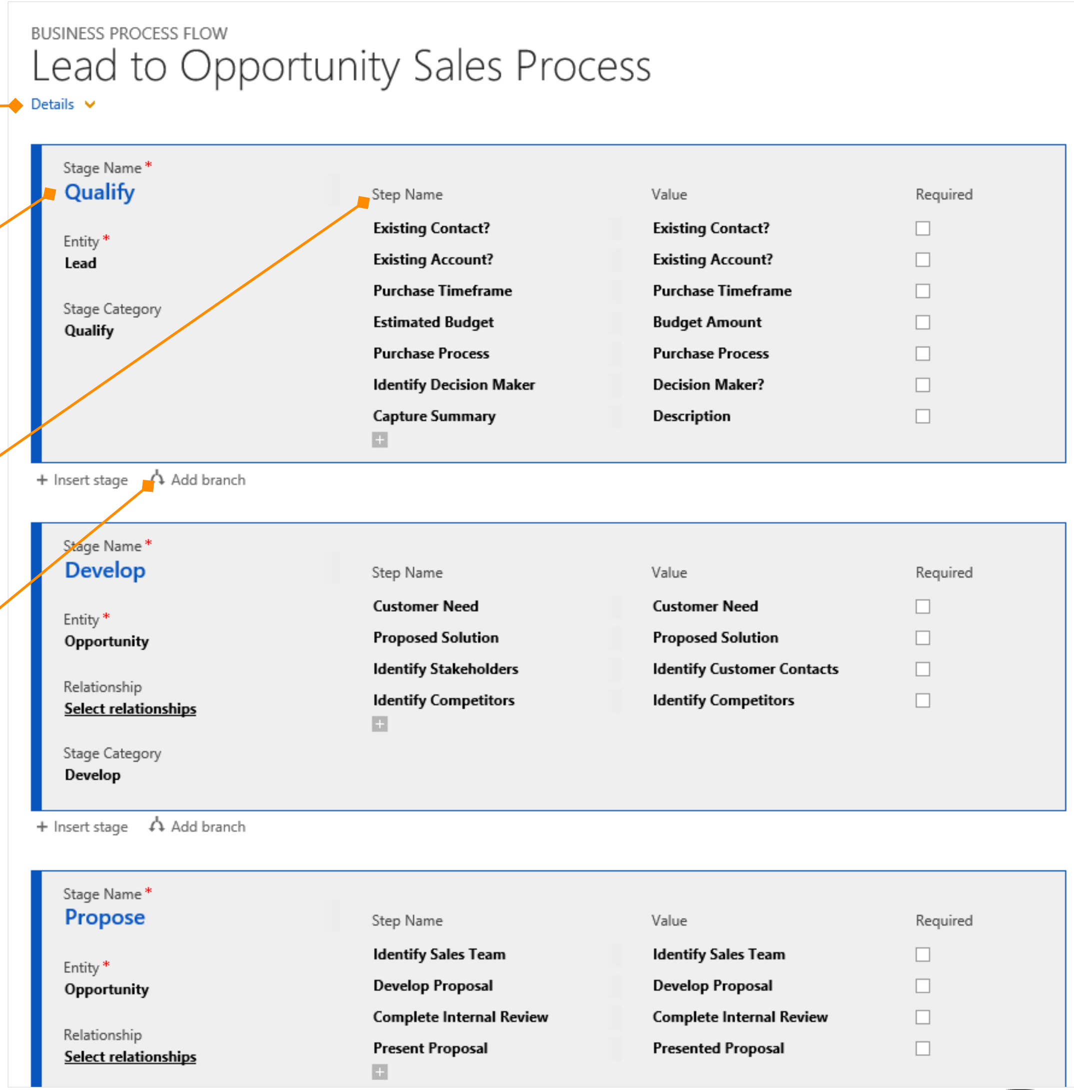
get to know the business process editor

You can edit details like the business process name and description.

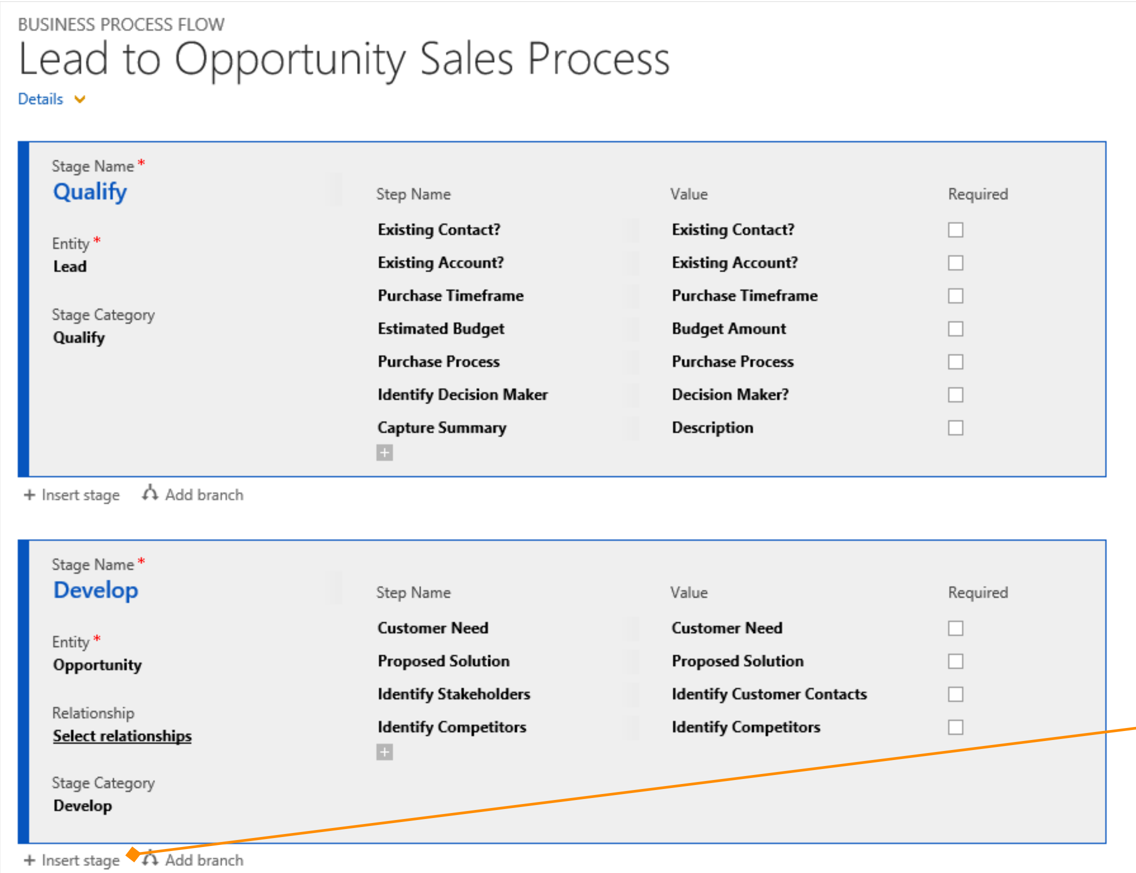
Each box is a **stage** in the business process. Choose **Stage Name** to change the name.

Each stage contains **steps**.

If your process needs to change under certain conditions, you can create a **branch** with different stages, and then merge back into your main process.



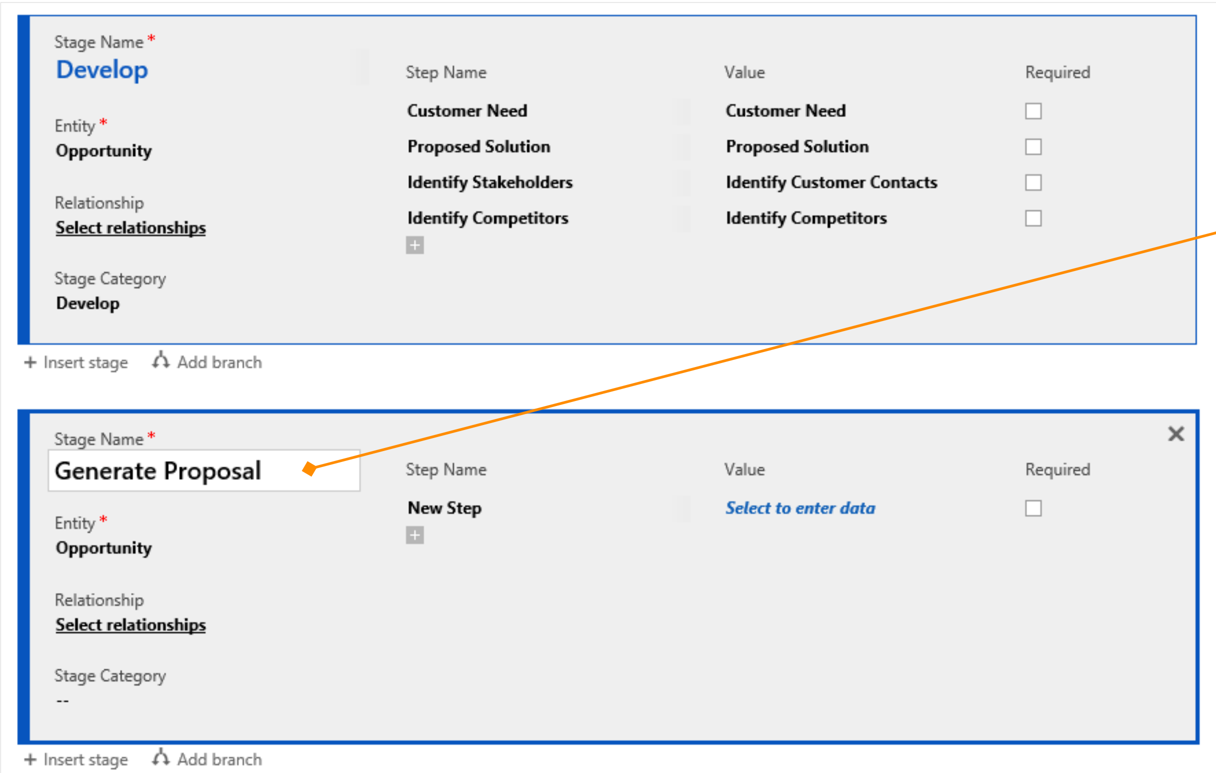
add a new stage to your process



In our example, we want to add a stage called **Generate Proposal** after the **Develop** stage. This new stage includes the steps for drafting a proposal to send a lead who is almost ready to buy.

Choose **Insert stage**.

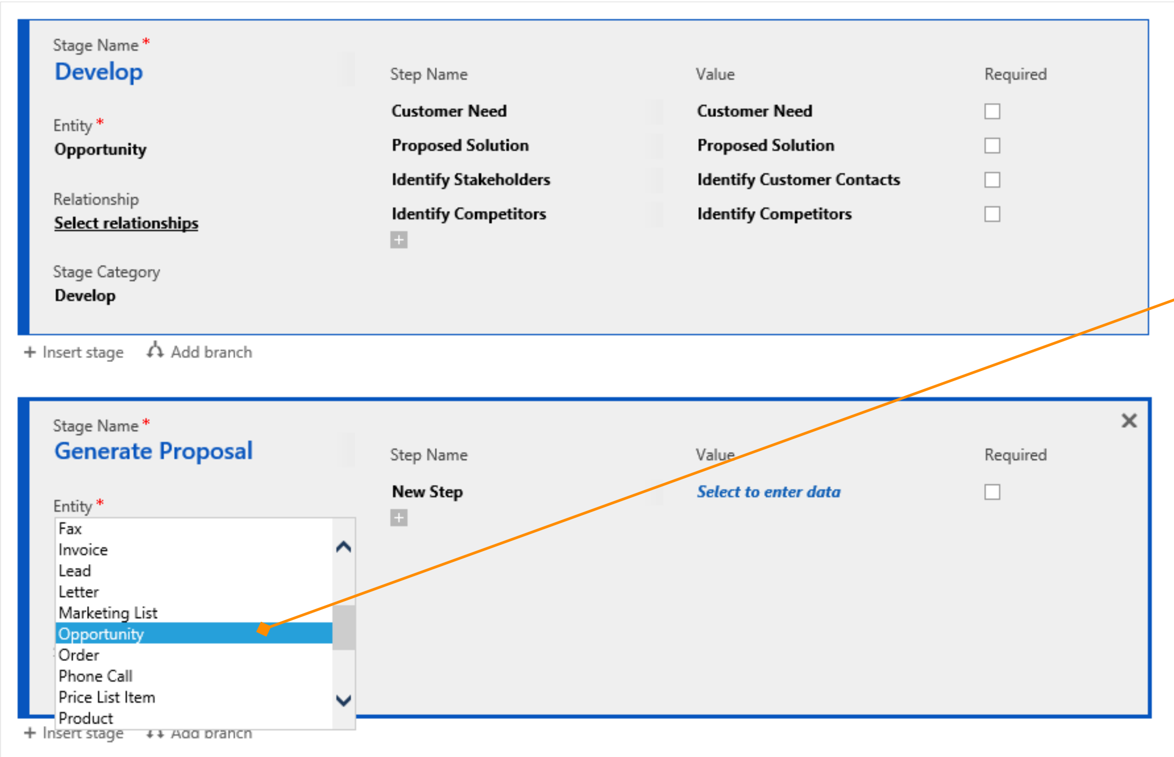
name your new stage



Type a name for the new stage.

In our example, the stage is called **Generate Proposal**.

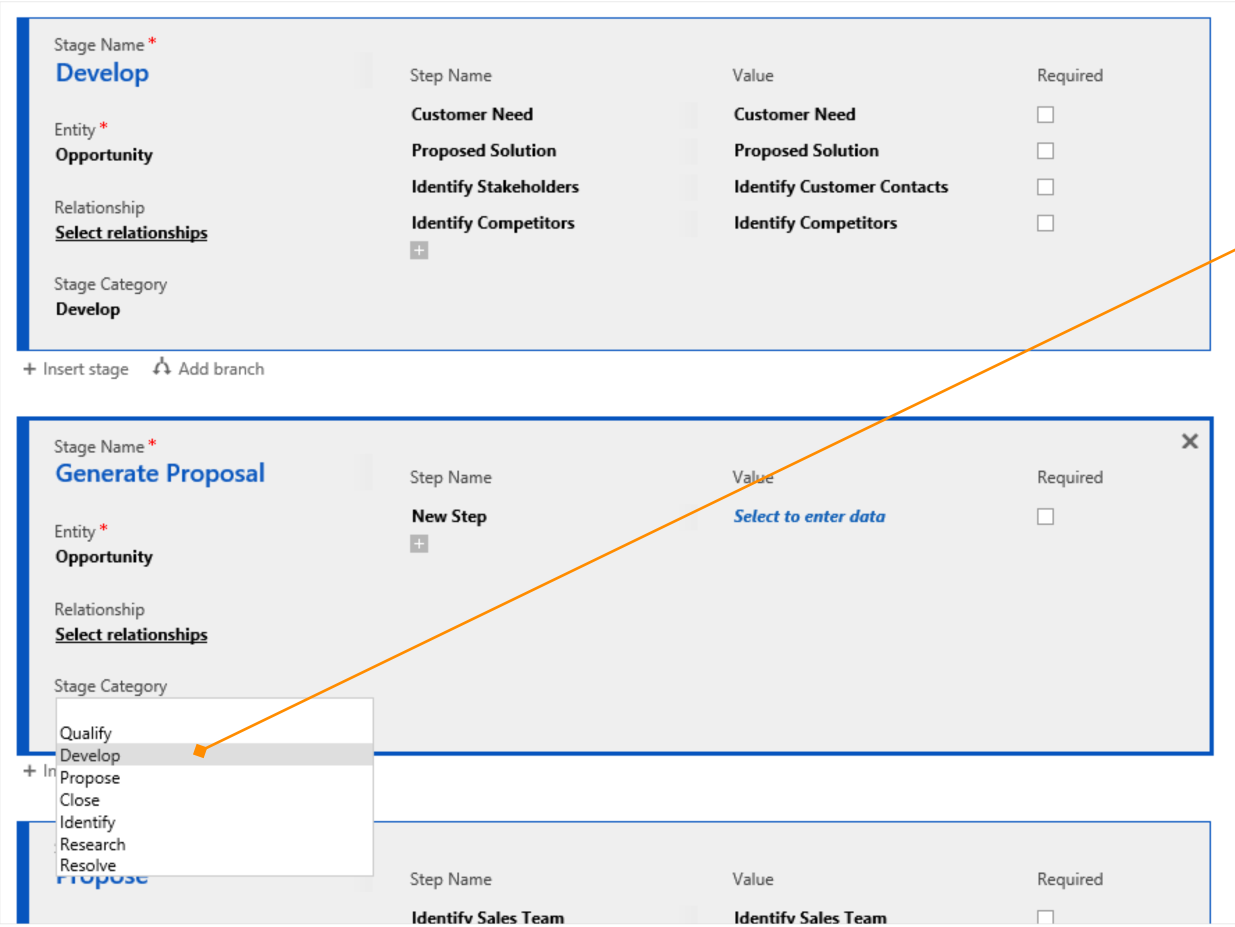
base your new stage on an entity



Select an **entity** (record type) to base the stage on. We're basing this one on **Opportunity**. The entity you select affects the fields available for the steps you add later on.

Choose the field under **Entity** and then select the one you want.

select a category for your new stage

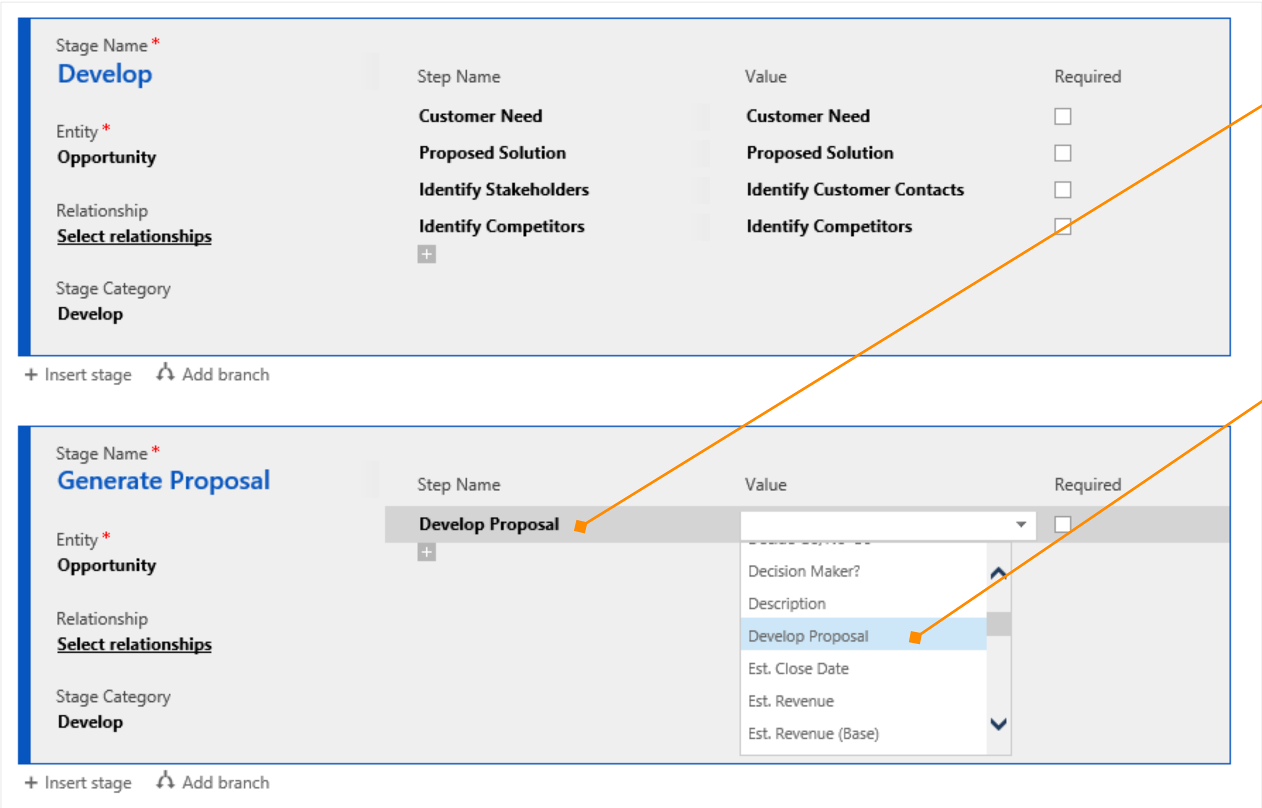


A category lets you group stages by a type of action.

In our example, we'll select **Develop**.

Choose the field under **Stage Category** and then select the one that fits best.

add steps to your new stage



In the **Step Name** column, choose the field and type a descriptive name for the step. This will appear on the process bar.

In the **Value** column, choose the field, and then select a field to use for data entry. If applicable, select the **Required** check box for any required field.

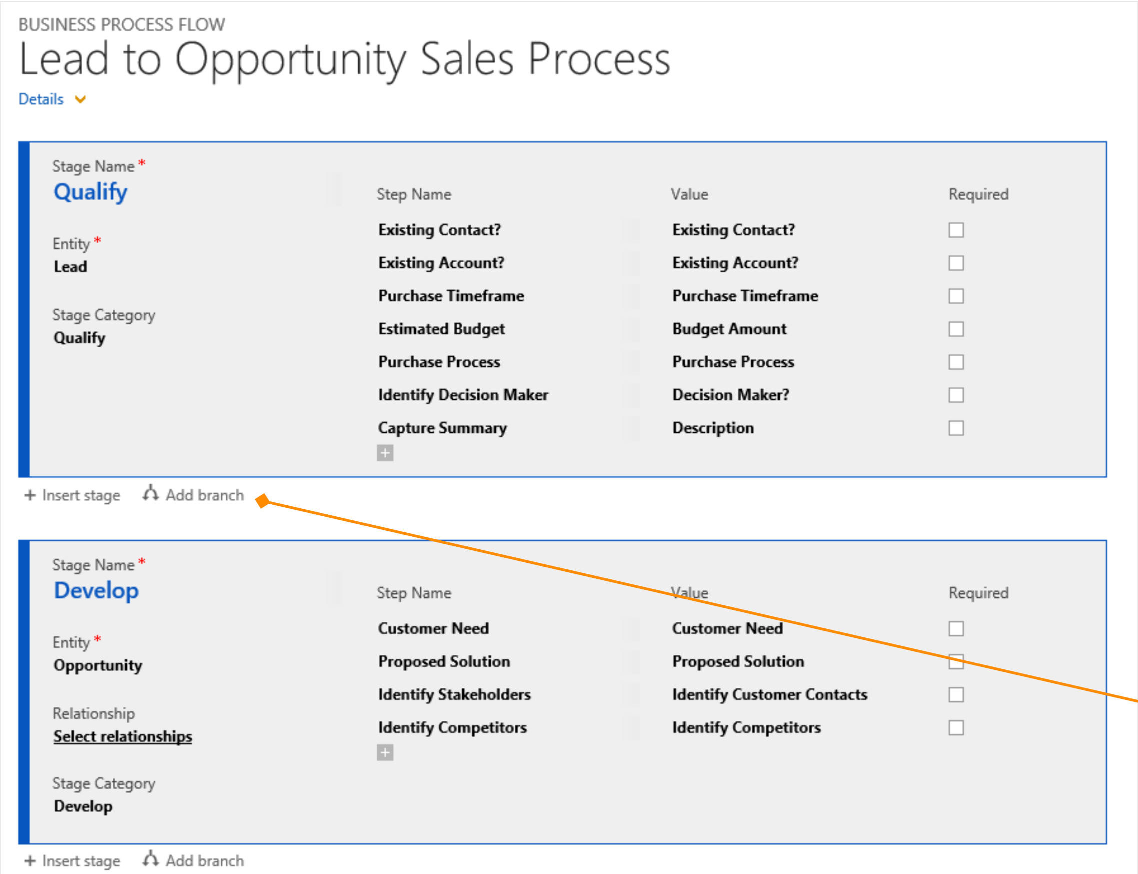
In our example, we'll just add one step called **Develop Proposal**.

If you need to add more steps, choose the **Add** button below the last step.

now let's add a branch

If you want a stage that appears only under certain conditions, you can add a branch to your business process. When you add a branch, you also set the conditions for which it appears.

create a branch in your process



In our example, we want to add an Incubate stage that appears only when the purchase timeframe for a lead is this year or unknown.

Let’s add a branch for this after the **Qualify** stage.

Choose **Add branch**.

set the conditions for the branch

Now you set the conditions for when you want the branch to appear.

A In the **Field** dropdown, select **Purchase Timeframe**. The available fields are steps in the preceding stage.

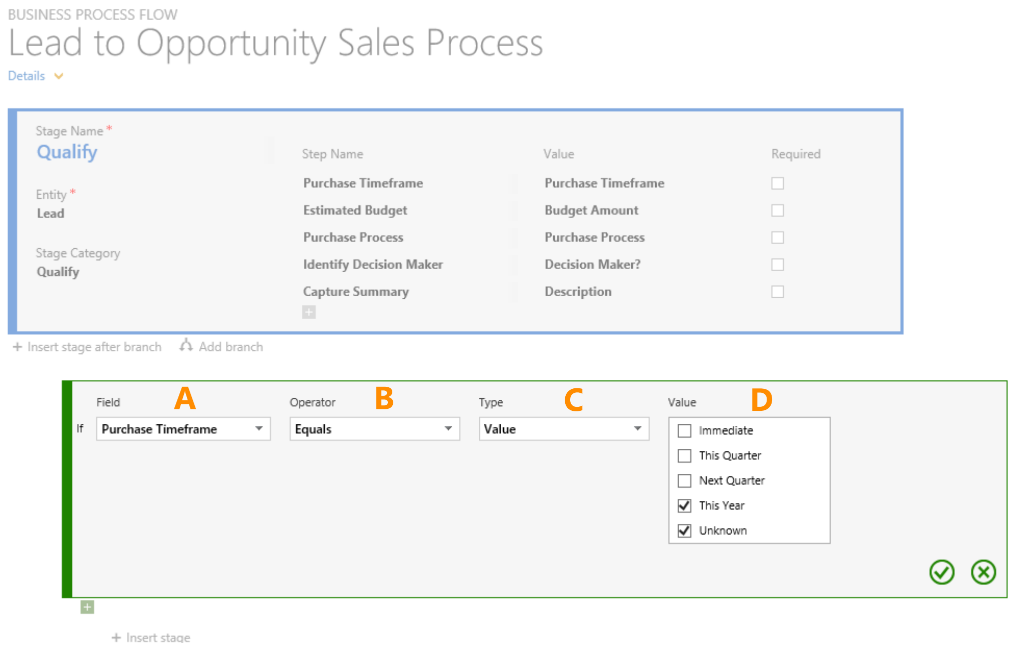
B In the **Operator** dropdown, select **Equals**.

C In the **Type** dropdown, select **Value**.

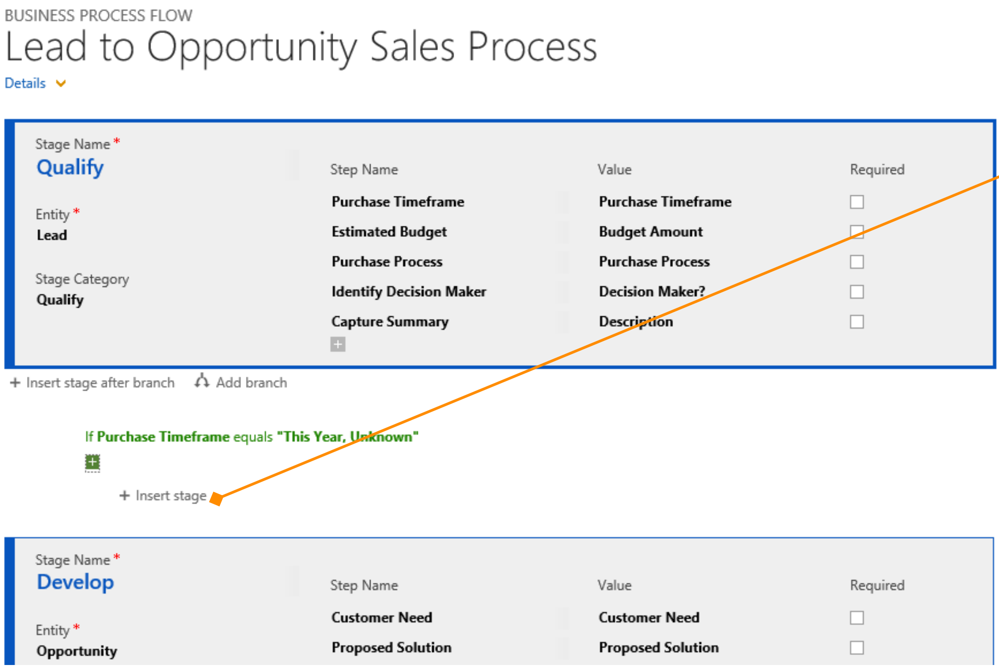
D In the **Value** list, select **This Year** and **Unknown**.

When you're done setting the conditions for the stage, select ✓.

If you want to add another condition, select the **Add** button +.



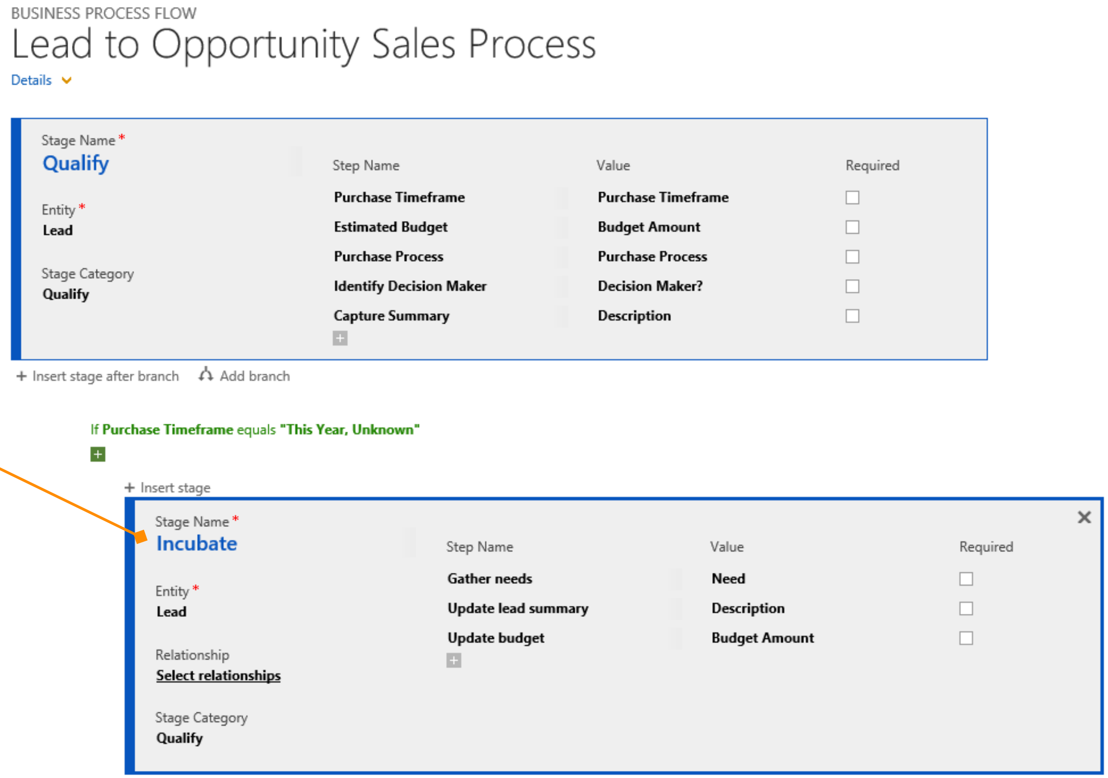
add a stage in the branch



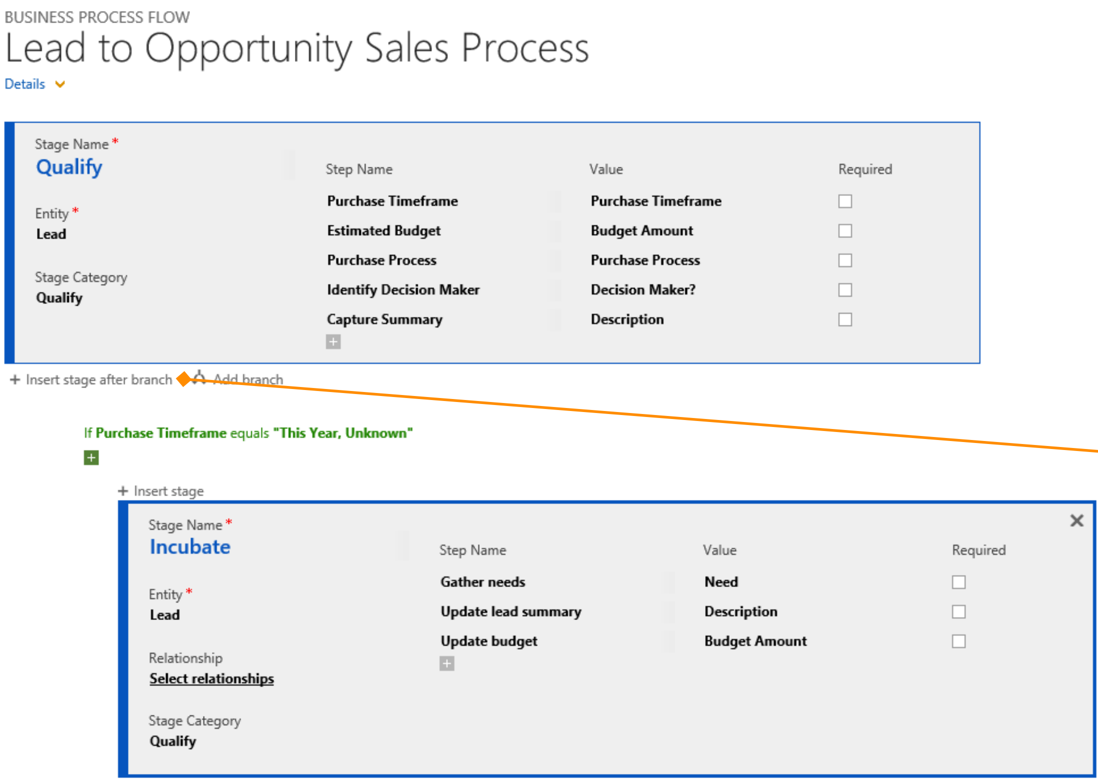
Choose **Insert stage**.

edit the new stage

Use the same steps as before to edit the new stage.



add a stage after the branch

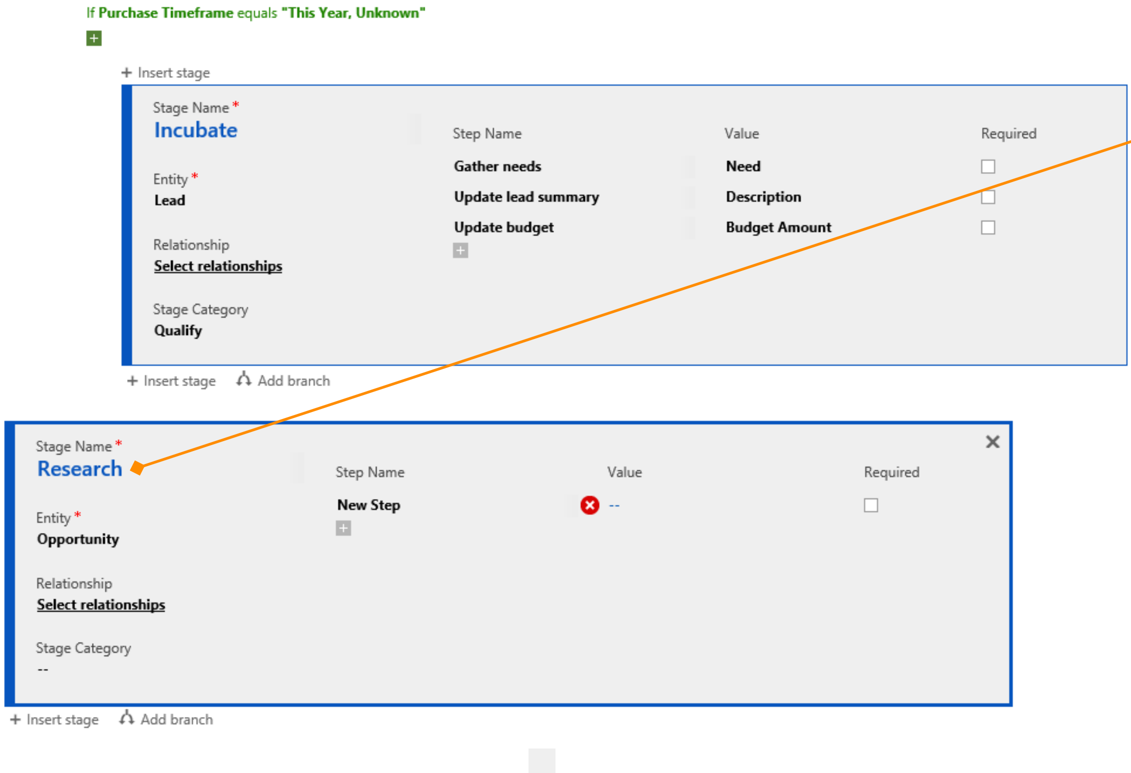


Now that you've created a branch, you need to add a stage for the two branches to merge back into to continue with the process.

In our example, we'll add a stage called **Research** that both the **Qualify** and **Incubate** stages merge into.

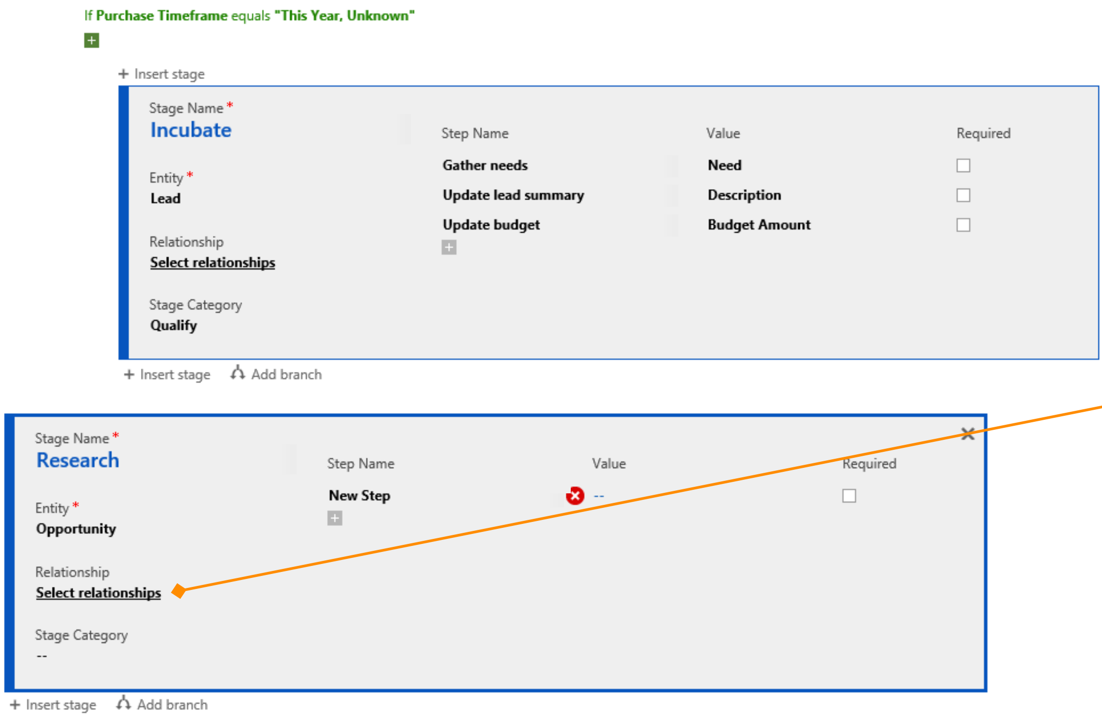
Choose **Insert stage after branch**.

edit the new stage



Use the same steps as before to edit the new stage. Name this stage **Research**, base it off the **Opportunity** entity, categorize it as **Research**, and add steps to it.

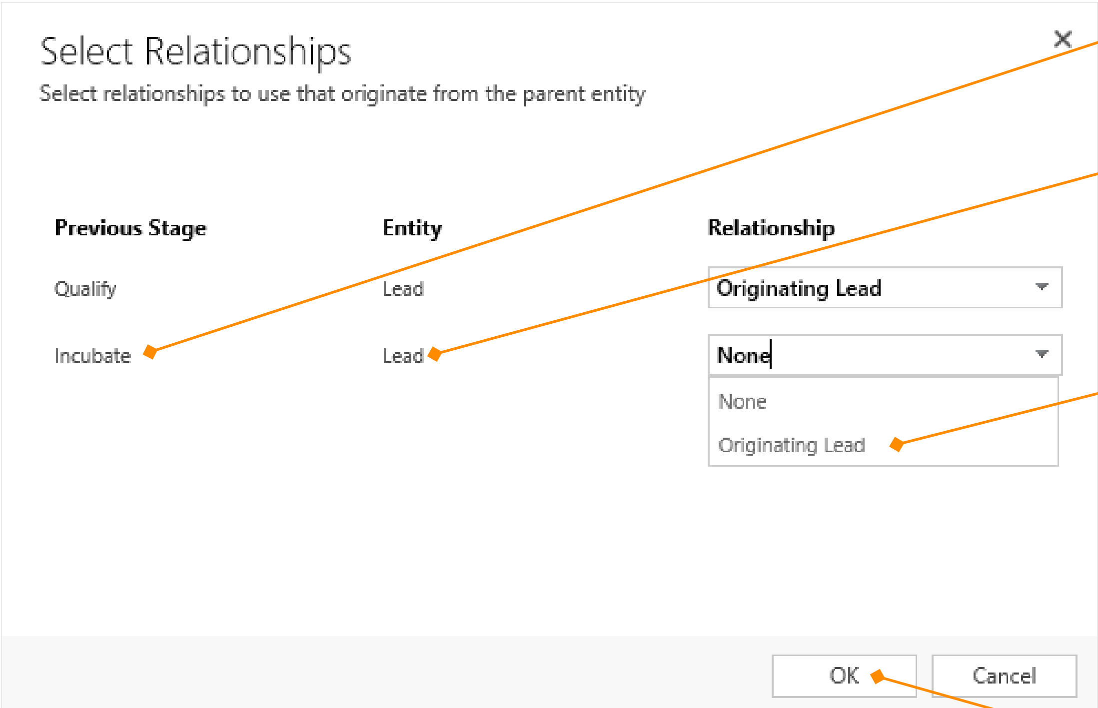
define how the stages are related



Because the **Research** stage is based on **Opportunity** while the **Qualify** and **Incubate** stages are based on **Lead**, you need to define how these stages are related.

Choose **Select Relationships**.

set the relationships



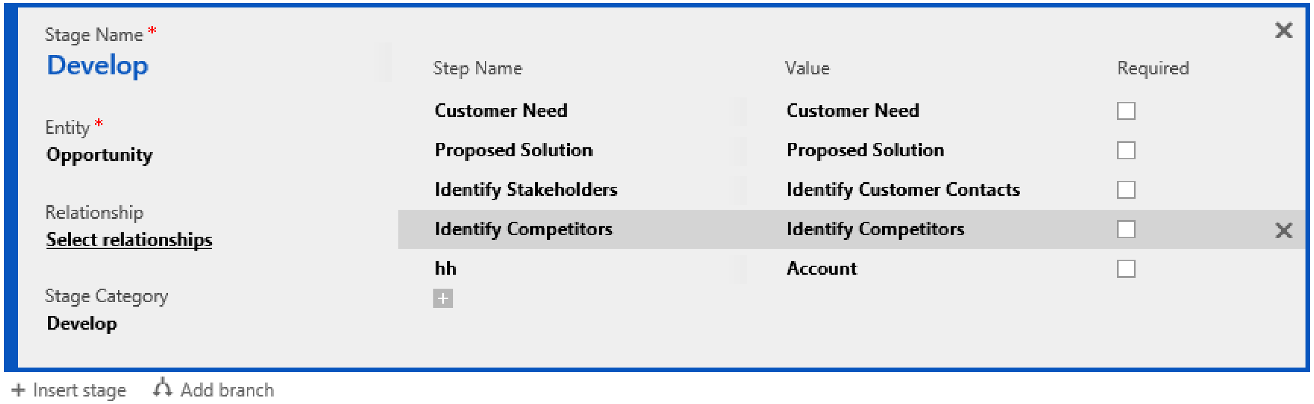
Select the previous stage.

Select the entity the previous stage is based on.

Select the relationship to this stage.

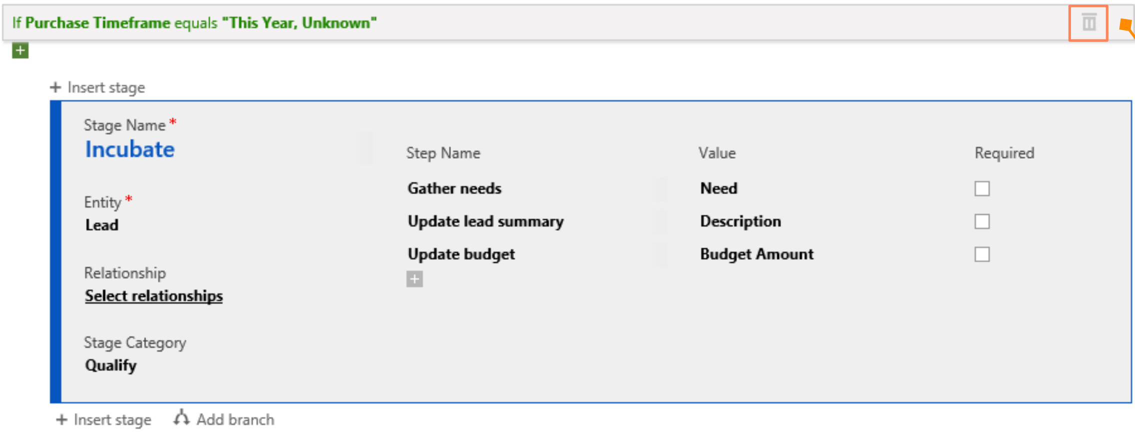
Choose **OK** when you're done.

need to delete a stage or a step?



Select the stage or step you need to remove, and then choose **X**.

need to delete a condition?



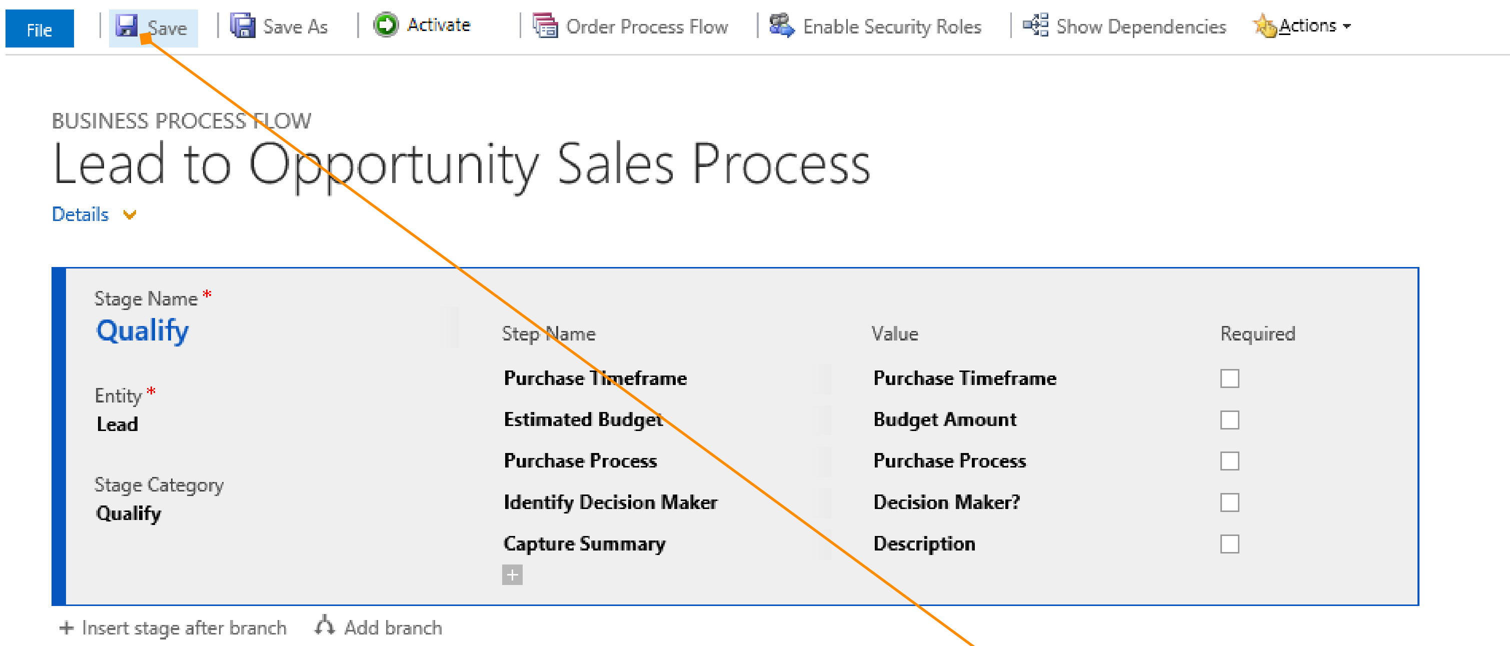
Hover over the condition you want to delete and choose the **Delete** button.

If you have more than one expression in your branch, deleting all of them deletes the entire branch.

make your business process available for use

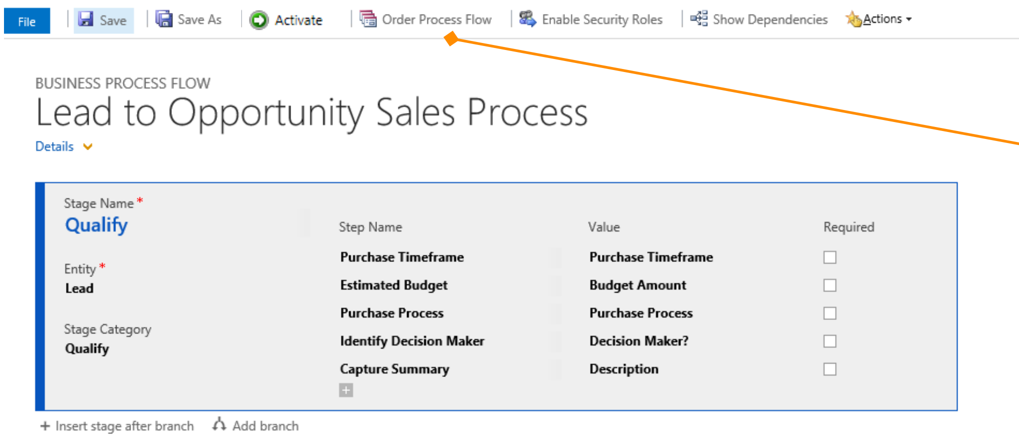
You're almost done! All you need to do now is save your business process and make it available for new CRM records created by your sales or service reps.

save your work



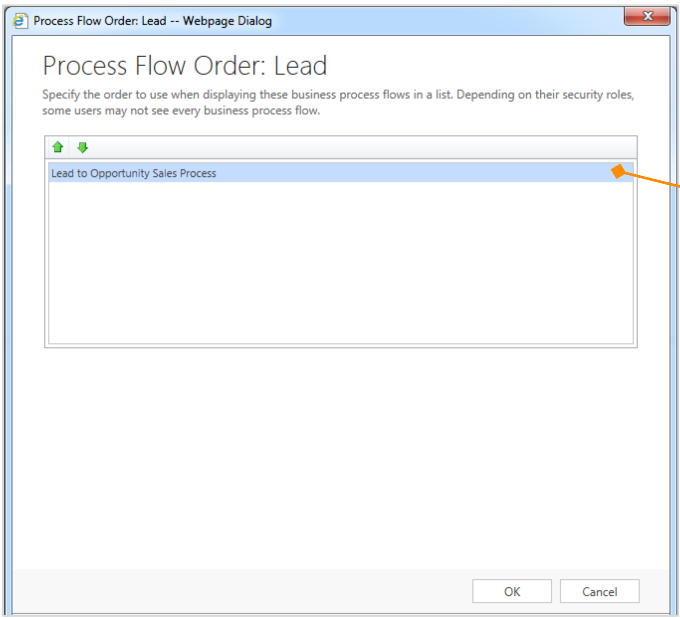
When you have the stages and steps the way you want them, choose **Save**.

set which records use your process



If there's more than one business process for a record type, you'll need to set which process is automatically assigned to new records.

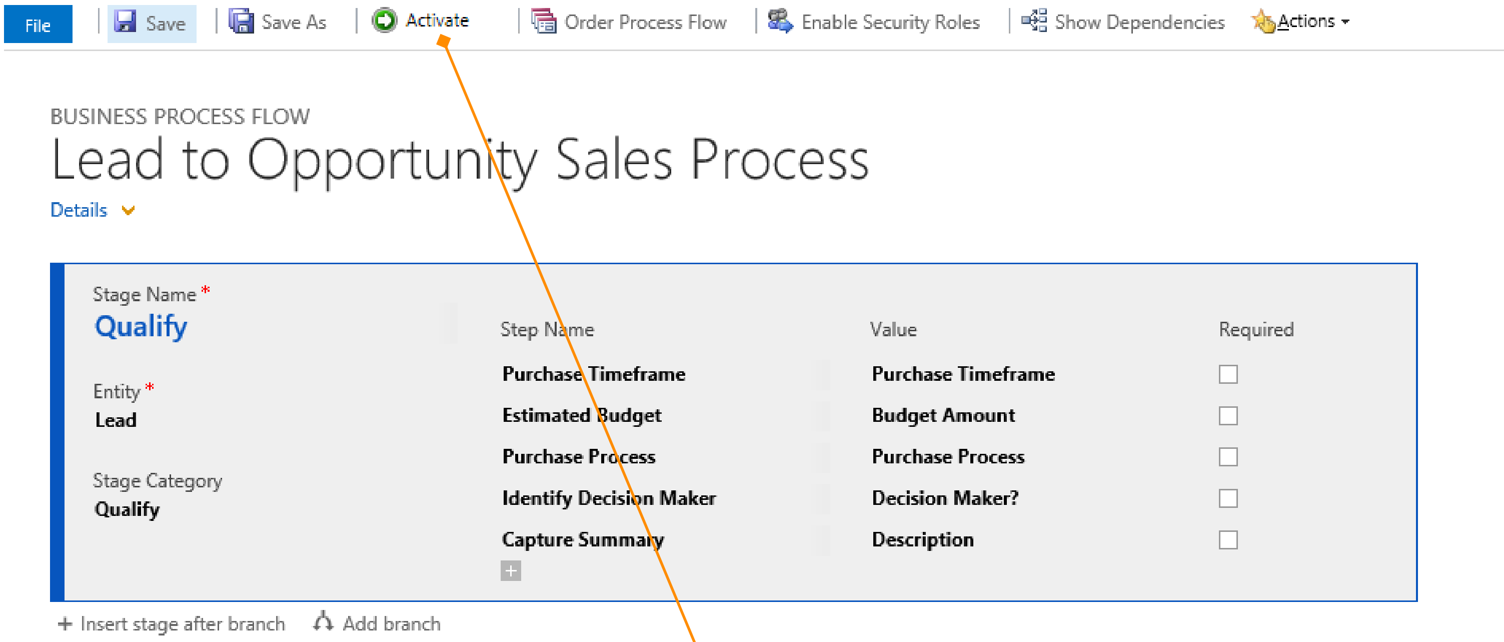
On the command bar, choose **Order Process Flow**.



In our example, there's only one business process for leads, so it will be assigned to new leads automatically. No action needed.

Note: If there is more than one, and you want it assigned to new records automatically, you need to move the process to the top of the list.

activate the business process



You need to activate a business process before people can use it.

On the command bar, choose **Activate**.

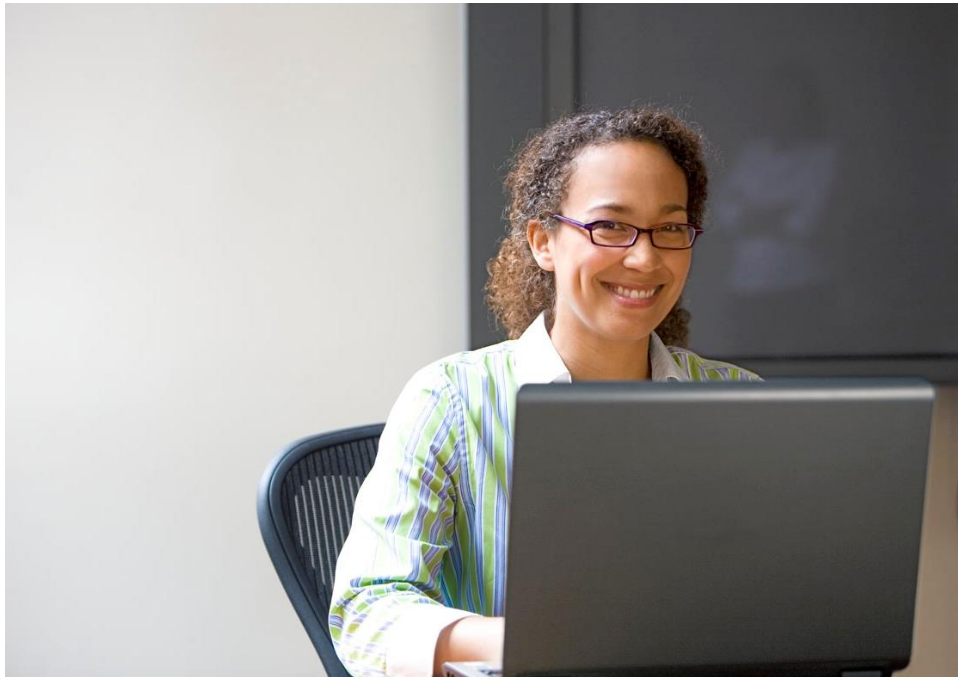
Now when you create a new lead, this process will be assigned to it automatically, and the stages and steps will be ready to follow as you work with customers.

now try it yourself

Now that you've gone through an example, you're ready to adapt your own business process to meet the needs of your organization.

To help you get going quickly, there are a couple of great sources for business processes that you can start with:

- Several ready-to-use processes for common business scenarios are available. To adapt one of these, first you'll need to add them to the system (similar to the way you add sample data).
- Or, you can start from a business process solution that you download from Microsoft PinPoint. You'll find a library of free templates by industry.



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