Customize a business process in CRM

Make Microsoft Dynamics CRM processes match the way your organization works





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?
- The basics of customizing a business process
- Now let's add a branch
- Make your business process available for use
- <u>Next steps</u>

what is a business process?

Some inte	rest in ou	r pr	oducts (sar	mple)			Est. Close Date	Est. Revenue	Status In Progress	Ow B	mer [*] Nancy Buch
Qualify			Develop (Active)		>	Propose		Close			→ Next Stage
Customer Need Proposed Solution Identify Stakeholders	click to enter click to enter mark complete		Identify Competitors	mark complete							i A

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? <u>View your user profile</u>

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

see your next steps – no guesswork!



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

М	icrosoft Dynamics CRM 🗸 🏦 📋	SETTINGS - Processes	Create	Maria Camer Contoso	••• 🔍 🔅 ?
+	My Processes 🕤		Sea	rch for records	Q
₹.	System Views Activated Processes	Jctivate More Actions 👻			
	All Process Templates	Category	Primary Entity	Status	Created On
	All Processes	Business Process Flow	Lead	Activated	11/11/2013 5:09
	Business Process Flows	Business Process Flow	Case	Activated	11/11/2013 5:09
_	Draft Processes	Business Process Flow	Opportunity	Activated	11/11/2013 5:09
	My Processes		opportunity		
	Create Personal View	Business Process Flow	Campaign	Activated	11/12/2013 10:1
	Save Filters as New View	Business Process Flow	Contact	Activated	11/12/2013 10:1
	Save Filters to Current View	Pusiness Drasass Flaw	Cara	Activated	11/12/2012 0:00

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

Microsoft Dynamics CRM 🗸 🏦 🕴 se	TTINGS 🗸 Processes 🛛 🗸	Create
➡ Business Process Flows	~	Search for
🛃 New 🛃 📓 🤹 🗙 🖸 Activate 🗯 De	eactivate More Actions 👻	
✓ Process Name	Category	Primary Entity
Lead to Opportunity Sales Process	Business Process Flow	Lead
Phone to Case Process	Business Process Flow	Case
Opportunity Sales Process	Business Process Flow	Opportunity
	Choose a business	process in the list to loc

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



add a new stage to your process

BUSINESS PROCESS FLOW	ortunity Sales Prod	cess		
Details ♥)			In our example, we want to add a stag
Stage Name * Qualify Entity * Lead Stage Category Qualify	Step Name Existing Contact? Existing Account? Purchase Timeframe Estimated Budget Purchase Process	Value Existing Contact? Existing Account? Purchase Timeframe Budget Amount Purchase Process	Required	called Generate Proposal after the Develop stage. This new stage include the steps for drafting a proposal to send a lead who is almost ready to buy
+ Insert stage 🖞 Add branch	Identify Decision Maker Capture Summary	Decision Maker? Description		
Stage Name * Develop	Step Name	Value	Required	
Entity * Opportunity	Customer Need Proposed Solution	Customer Need Proposed Solution		
Relationship <u>Select relationships</u>	Identify Competitors	Identify Competitors		Choose Insert stage .
Stage Category Develop				



name your new stage

Stage Name *			
Develop	Step Name	Value	Required
Entite *	Customer Need	Customer Need	
Opportunity	Proposed Solution	Proposed Solution	
	Identify Stakeholders	Identify Customer Contacts	
Relationship <u>Select relationships</u>	Identify Competitors	Identify Competitors	
Stage Category			
Develop			
Insert stage 🔥 Add branch			
Insert stage A Add branch			×
Insert stage A Add branch Stage Name * Generate Proposal	Step Name	Value	X Required
Insert stage Add branch Stage Name * Generate Proposal Entity * Opportunity	Step Name New Step	Value Select to enter data	X Required
Insert stage Add branch Stage Name * Generate Proposal Entity * Opportunity Relationship Select relationships	Step Name New Step	Value Select to enter data	X Required

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



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 \bigotimes .

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

Opportunity Sales Process ead to Qualify Required Purchase Timeframe Purchase Timeframe Estimated Budget Budget Amount Lead Purchase Process Purchase Process Identify Decision Maker Decision Maker? Qualify Capture Summary Description + Insert stage after branch 🔥 Add branch R С D Δ Operator Field Type Value Purchase Timeframe Equals Value * * Immediate This Quarter



+ Insert stage

add a stage in the branch



edit the new stage



 $\overline{}$

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

If Purchase Timeframe equals "This Year, Unknown"



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.

+ Insert stage 🔥 Add branch

 \bigcirc

define how the stages are related



+ Insert stage 🔥 Add branch

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



need to delete a stage or a step?

Stage Name * Develop	Step Name	Value	× Required	
Entity * Opportunity Relationship Select relationships	Customer Need Proposed Solution Identify Stakeholders Identify Competitors	Customer Need Proposed Solution Identify Customer Contacts Identify Competitors		Select the stage or step you need to remove, and then choose X .
Stage Category Develop	hh C	Account		

+ Insert stage 🔥 Add branch

need to delete a condition?

vort stago			
Stage Name *			
Incubate	Step Name	Value	Required
Entity *	Gather needs	Need	
Lead	Update lead summary	Description	
Relationship Select relationships	Update budget	Budget Amount	
Stage Category			
Qualify			

+ Insert stage 🔥 Add branch

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 you	ur work		
e 🛛 🗖 Save 🗍 🔚 Save As 🗍 🌘	🕽 Activate 🛛 🖷 Order Process Flow 🗍 📽	Enable Security Roles 🛛 🛱 Show Dep	pendencies 🚸 <u>A</u> ctions -
BUSINESS PROCESS FLOW Lead to Oppo Details ~ Stage Name *	ortunity Sales Proc	cess	
Qualify	Step Name	Value	Required
Entity *	Purchase Timeframe	Purchase Timeframe	
Lead	Estimated Budget	Budget Amount	
	Purchase Process	Purchase Process	
Stage Category Qualify	Identify Decision Maker	Decision Maker?	
	Capture Summary	Description	
+ Insert stage after branch 🎄 Add	branch		

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

set which records use your process



+ Insert stage after branch 🔥 Add branch

Process Flow Order: Lead Webpage Dialog	×	
Process Flow Order: Lead Specify the order to use when displaying these business process flows in a list. Depending on their security roles, some users may not see every business process flow.		
☆ ₹		
OK]	

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

File Save Save Save As	🖸 Activate 🛛 🗟 Order Process Flow 🗍 🚳	Enable Security Roles 🛛 🛱 Show De	pendencies 🐞 <u>A</u> ctions 🗸
BUSINESS PROCESS FLOW	ortunity Sales Proc	ess	
Details 🗸			
Stage Name *			
Quality	Step Name	Value	Required
Entity *	Purchase Timeframe	Purchase Timeframe	
Lead	Estimated Budget	Budget Amount	
	Purchase Process	Purchase Process	
Stage Category Qualify	Identify Decision Maker	Decision Maker?	
	Capture Summary	Description	
+ Insert stage after branch $~~$ Ad	d branch		

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 <u>add them to the</u> <u>system</u> (similar to the way you add sample data).
- Or, you can start from a <u>business</u> process solution that you download from Microsoft PinPoint. You'll find a library of free templates by industry.



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