

Business processes in Dynamics CRM

Follow consistent steps every
time you work with your
customers.



handle all the important details

Business processes help you work with your customers consistently by guiding you through standard stages and steps for common tasks.

For example, your organization may want everyone to handle new sales leads or service cases the same way. Business processes help you do that.



TIP:

Several ready-to-use processes for common business scenarios are available. [Find out how to add them to your system.](#)



check out the process bar

To help you work with customers, each stage and step is clearly outlined in the process bar at the top of the screen. You'll see the process bar when you work on certain types of customer records, like leads or opportunities.

The screenshot displays the Microsoft Dynamics CRM interface for an opportunity record. At the top, the navigation bar includes 'Microsoft Dynamics CRM', a hamburger menu, and navigation options for 'Sales', 'Opportunities', and 'Interested in Product Designer'. The user profile 'Terry Adams, Proseware' is visible on the right. Below the navigation bar, a toolbar contains actions like '+ NEW', 'CLOSE AS WON', 'CLOSE AS LOST', 'RECALCULATE OPPORTUN...', 'ASSIGN', 'EMAIL A LINK', and 'DELETE'. The main header shows 'OPPORTUNITY Interested in Product Designer' with summary fields: 'Est. Close Date: 5/1/2015', 'Est. Revenue: \$527,871.00', 'Status: In Progress', and 'Owner: Terry Adams'. The process bar consists of four stages: 'Qualify (Active)', 'Develop', 'Propose', and 'Close', with a 'Next Stage' button. The 'Qualify (Active)' stage is expanded to show three steps: 'Identify Contact' (assigned to Eli Bowen), 'Identify Account' (assigned to Trey Research), and 'Purchase Timeframe' (set to 'This Quarter'). The 'Develop' stage shows two steps: 'Estimated Budget' (\$612,970.00) and 'Purchase Process' (Identify Decision Maker, marked as 'complete'). The 'Propose' stage shows one step: 'Capture Summary'. The 'Close' stage shows the text 'New prospect seeking ou'. A blue bar at the bottom right of the process bar contains an information icon and an upward arrow.

Choose a stage in the process bar to see the steps involved.

Choose a field to type in the details.



look at an example

The best way to learn about how business processes help you work with customers is to look at an example.

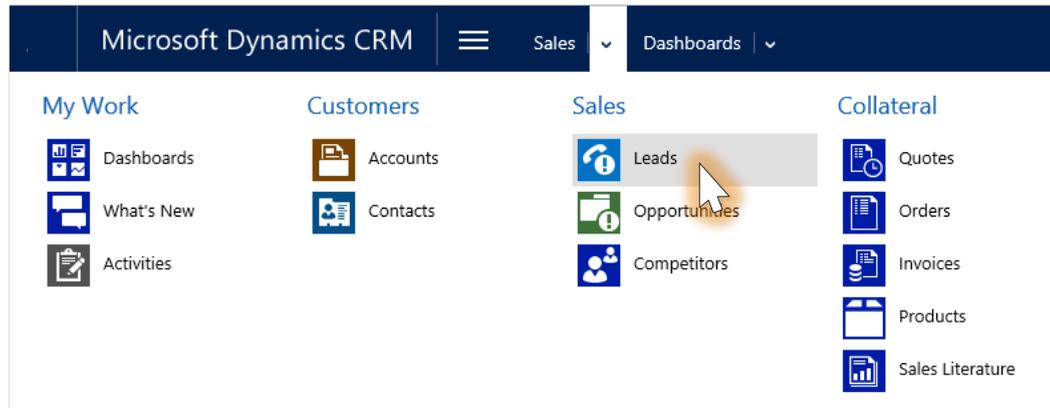
Let's look at a standard business process for working with leads.



first, go to your leads

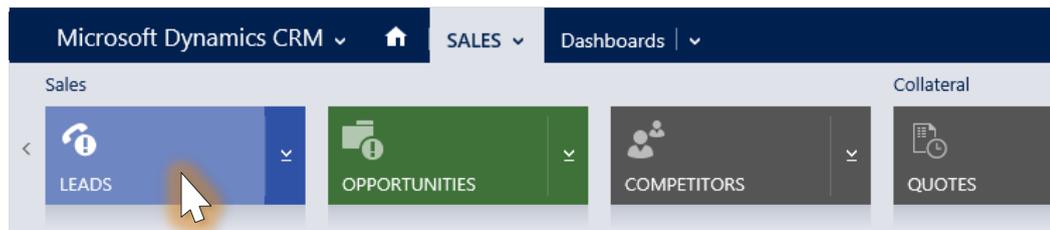
If your screen looks like this (latest version):

Go to **Sales > Leads**.



If your screen looks like this (older version):

Go to **Microsoft Dynamics CRM > Sales > Leads**.



...and then select an existing lead

Microsoft Dynamics CRM

Sales | Leads

+ NEW | DELETE | EMAIL A LINK | RUN REPORT | EXPORT TO EXCEL | IMPORT DATA | CHART PANE

My Open Leads

Name ↑	Topic	Status Reason	Created On
Contoso Pharmaceuticals	You have been unsubscribed...	New	3/18/2015 12:40 AM
Counts Vong	Follow-up with information regardin...	New	1/1/2015 7:08 PM
<input checked="" type="checkbox"/> Debra Garcia	Store is expanding - send new literat...	New	1/1/2015 7:08 PM
Ian Palangio	Store expanding	New	3/17/2015 10:10 PM
Ivan Komashinsky	Interested in our newer offerings	New	1/1/2015 7:08 PM
Lidman Anna	Some interest in our products	New	1/1/2015 7:08 PM
Nancy Anderson	New store opened this year - follow...	New	1/1/2015 7:08 PM
Peter Houston	Good prospect	New	1/1/2015 7:08 PM
Robin Counts	Likes our products	New	1/1/2015 7:08 PM
Susanna Stubberod	Mailed an interest card back	New	1/1/2015 7:08 PM
Tom Werner	Interested in products	New	3/18/2015 12:44 AM
Yvonne McKay	New store opened this year - follow...	New	1/1/2015 7:08 PM



check out the business process for leads

When you work with a lead, the process bar shows you all the steps you need to follow to complete each stage successfully. It's your roadmap to getting things done.

The screenshot shows the Microsoft Dynamics CRM interface for a lead record. The top navigation bar includes 'Microsoft Dynamics CRM', 'Sales', 'Opportunities', and 'Interested in Produc...'. The user profile is 'Terry Adams Proseware'. Below the navigation bar, there are action buttons: '+ NEW', 'DELETE', 'QUALIFY', 'DISQUALIFY', 'ADD TO MARKETING LIST', 'ASSIGN', and 'SHARE'. The lead record is for 'Debra Garcia' with a 'LEAD : INFORMATION' dropdown. The process bar shows four stages: 'Qualify (Active)', 'Develop', 'Propose', and 'Close'. The 'Qualify (Active)' stage is highlighted in blue and contains a play button icon. Below the process bar, there are fields for 'Existing Contact?', 'Existing Account?', and 'Purchase Timeframe' in the 'Qualify' stage; 'Estimated Budget', 'Purchase Process', and 'Identify Decision Maker' in the 'Develop' stage; and 'Capture Summary' in the 'Propose' stage. The 'Propose' stage is locked, indicated by a lock icon. The 'Close' stage is also locked. The 'Next Stage' button is at the end of the process bar.

Stage	Field	Value/Action
Qualify (Active)	Existing Contact?	click to enter
	Existing Account?	click to enter
	Purchase Timeframe	Unknown
Develop	Estimated Budget	click to enter
	Purchase Process	Committee completed
	Identify Decision Maker	completed
Propose	Capture Summary	click to enter
Close		

A flag shows the current stage.

A check mark means the step is complete.

A lock means this stage moves the lead to another record type, such as an opportunity.



enter data to complete each step

You can edit fields directly on the process bar.

Microsoft Dynamics CRM | Sales | Opportunities | Interested in Produc... | Terry Adams Proseware

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE

LEAD : INFORMATION | Debra Garcia | Lead Source: Web | Rating: Warm | Owner: Terry Adams

Qualify (Active) | Develop | Propose | Close | Next Stage

Existing Contact?	click to enter	Estimated Budget	\$ 6000.00	Capture Summary	click to enter
Existing Account?	click to enter	✓ Purchase Process	Committee		
✓ Purchase Timeframe	Unknown	✓ Identify Decision Maker	completed		

Choose a field within a step to type in details.

Steps automatically receive a check mark when you complete them.



visualize your progress

As you complete the steps, each stage provides guidance about what to do next, and helps you see your progress.

The screenshot shows the Microsoft Dynamics CRM interface for a lead record. The top navigation bar includes 'Microsoft Dynamics CRM', 'Sales', 'Opportunities', and 'Interested in Produc...'. The user profile is 'Terry Adams, Proseware'. Below the navigation bar are action buttons: '+ NEW', 'DELETE', 'QUALIFY', 'DISQUALIFY', 'ADD TO MARKETING LIST', 'ASSIGN', and 'SHARE'. The lead record is for 'Debra Garcia' (LEAD: INFORMATION). The lead source is 'Web', the rating is 'Warm', and the owner is 'Terry Adams'. The progress bar shows four stages: 'Qualify (Active)', 'Develop', 'Propose', and 'Close', with a 'Next Stage' button at the end. Below the progress bar, the 'Propose' stage is expanded to show a table of steps.

Stage	Step	Status	Value	Action
Qualify (Active)	Existing Contact?			click to enter
	Existing Account?			click to enter
	✓ Purchase Timeframe		Unknown	
Develop	✓ Estimated Budget		\$6,000.00	
	✓ Purchase Process		Committee	
	✓ Identify Decision Maker		completed	
Propose	Capture Summary			click to enter

Choose a stage to preview the steps in it.

Choose **Next Stage** to advance through the process.



advance through the stages

When you've completed all the steps, you'll need to advance to the next stage. You can move to another record type – for example, a lead can become an opportunity as you nurture a deal.



- 1 Click or tap **Next Stage**, and then select the next record type.



switch to another business process

Discover mid-stream that you need to follow a different process for a customer? No problem.

Microsoft Dynamics CRM | Sales | Leads | Debra Garcia

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE

LEAD : INFORMATION | Debra Garcia

Qualify (Active) | Develop

Existing Contact?	click to enter	✓ Estimated Budget	\$6,000.00
Existing Account?	click to enter	✓ Purchase Process	Committee
✓ Purchase Timeframe	Unknown	✓ Identify Decision Maker	completed

Choose ... , and then choose **Switch Process**.

Select Business Process Flow

This is a list of business process flows that are available for your security role.

- Car Dealership Sales Process
- Lead to Opportunity Close
This is the default process flow to work on a lead and convert it to an opportunity.

Select | Cancel

Select a different process.

Choose **Select**.



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