Business processes in Dynamics CRM

Follow consistent steps every time you work with your customers.

Microsoft

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.

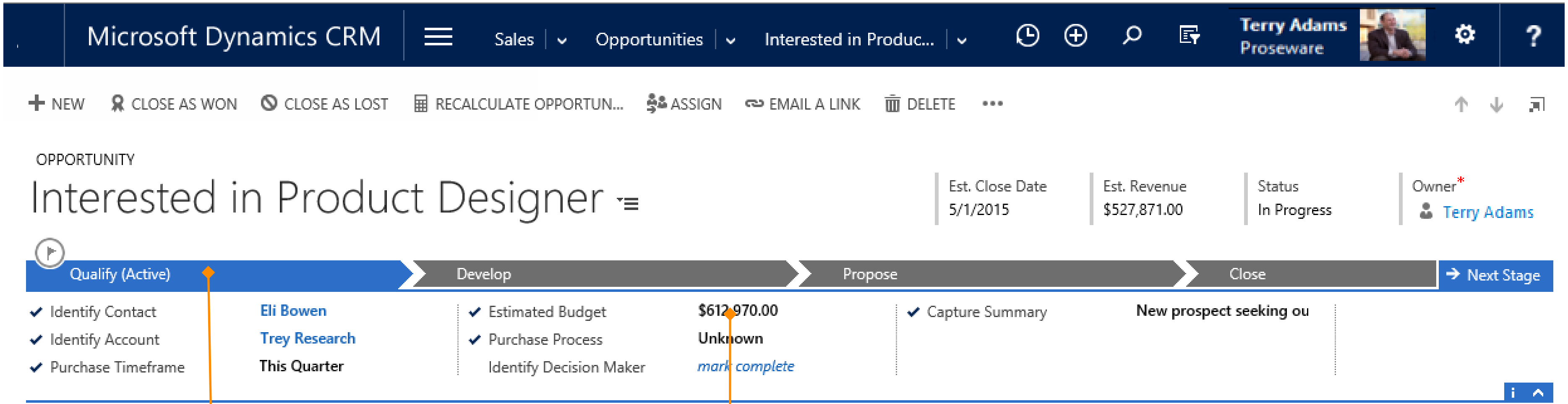
For example, your organization may want everyone to handle new sales leads or service cases the same way. Business processes help you do that.

TIP:
Several ready-to-use processes for common business scenarios are available. Find out how to add them to your system.

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

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.



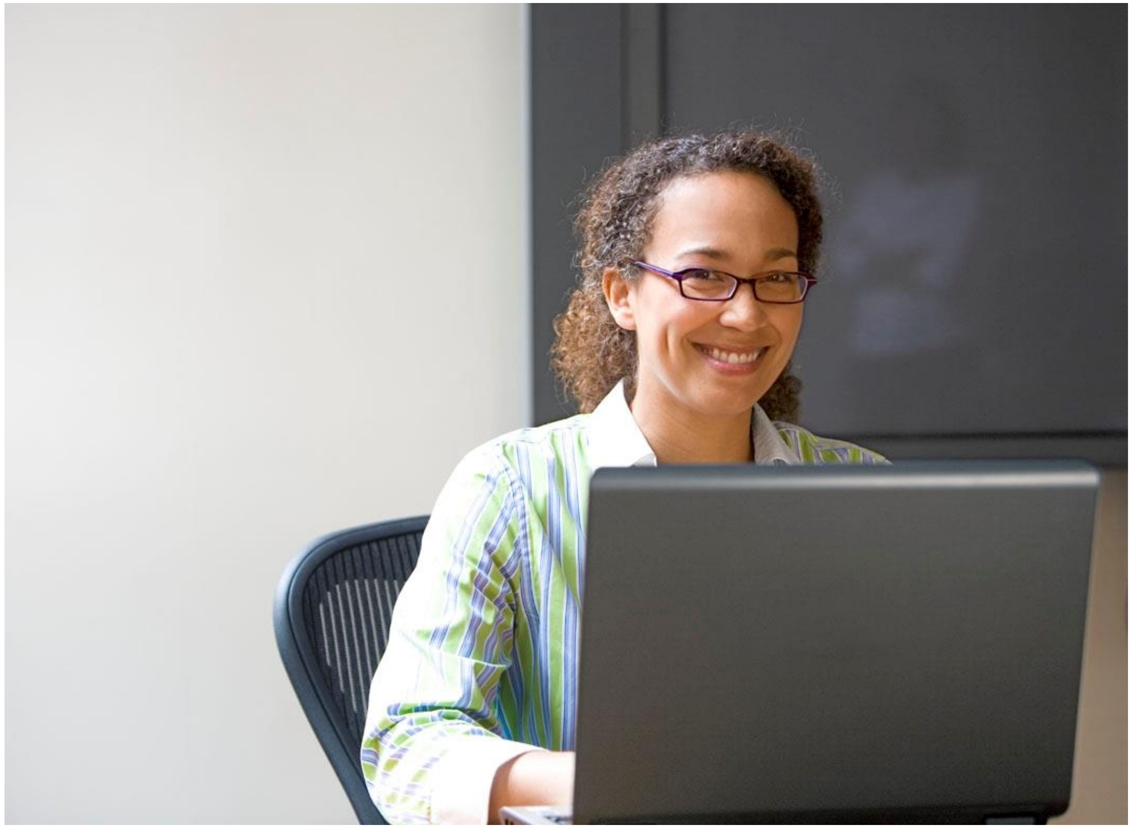
Choose a stage in the process bar to see the steps involved.

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.

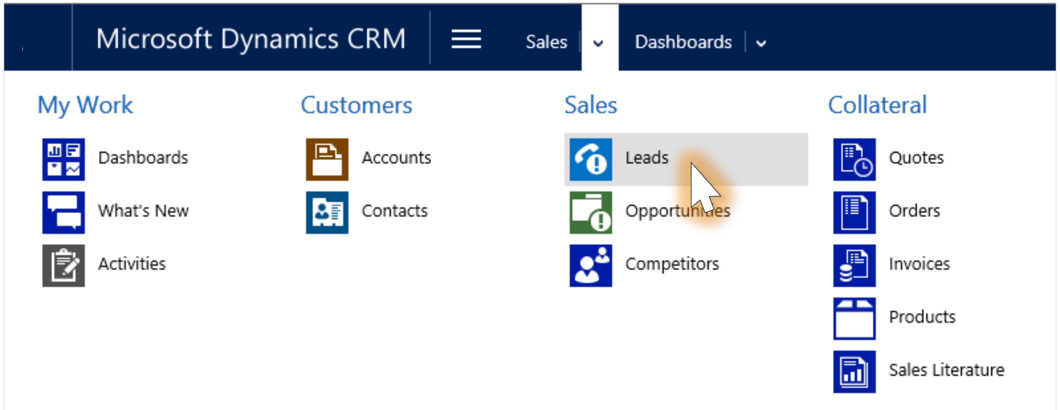
Let’s look at a standard business process for working with leads.



first, go to your leads

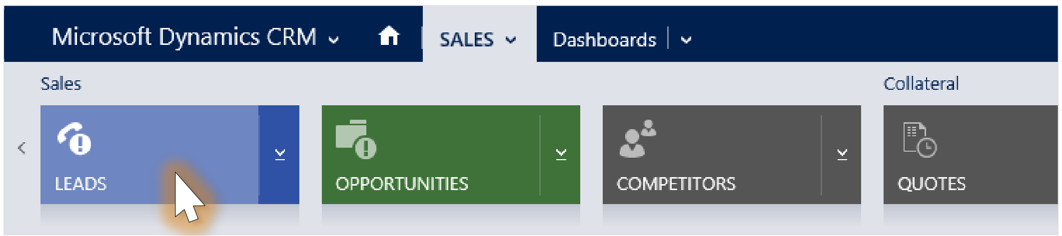
If your screen looks like this (latest version):

Go to **Sales** > **Leads**.

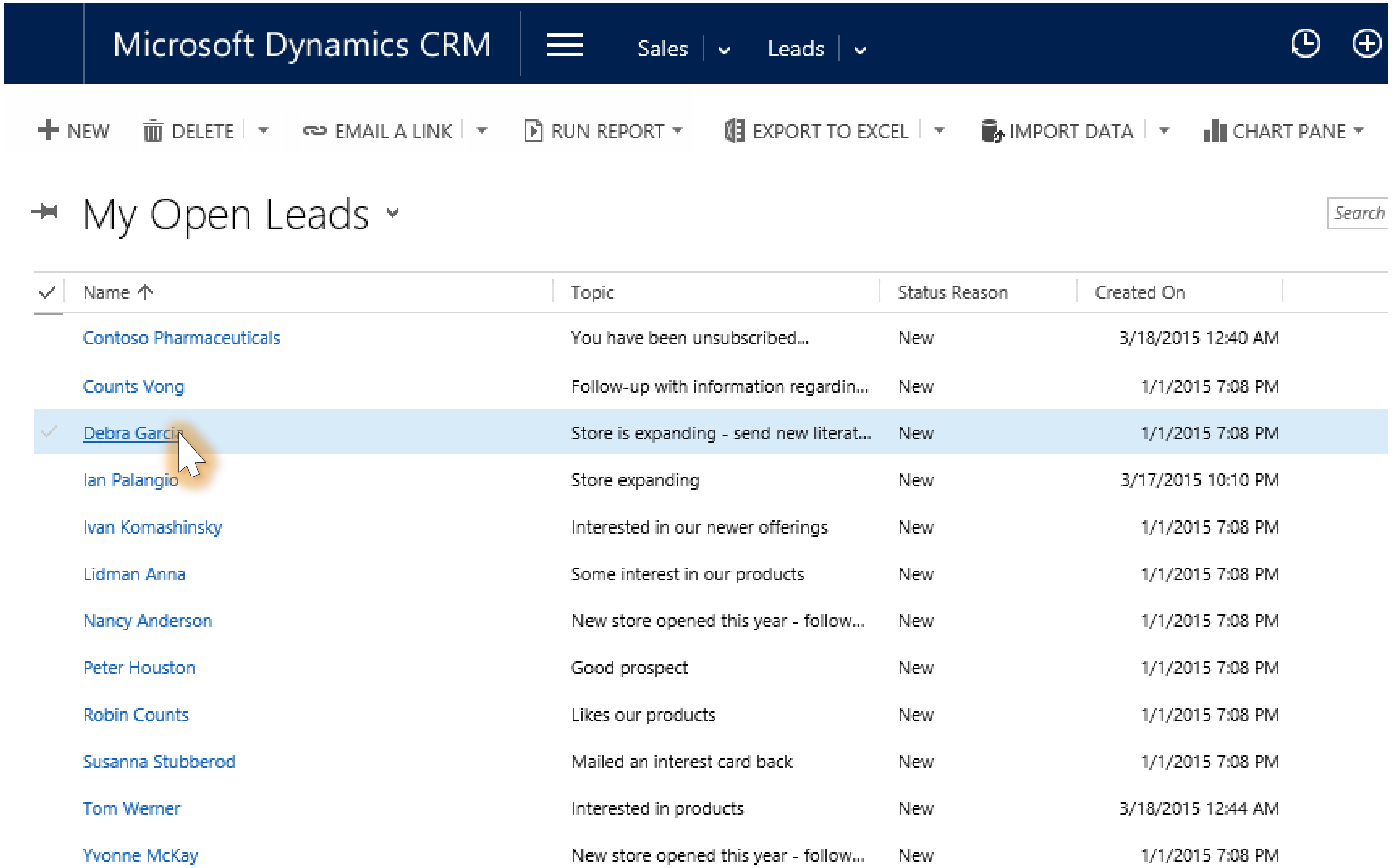


If your screen looks like this (older version):

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



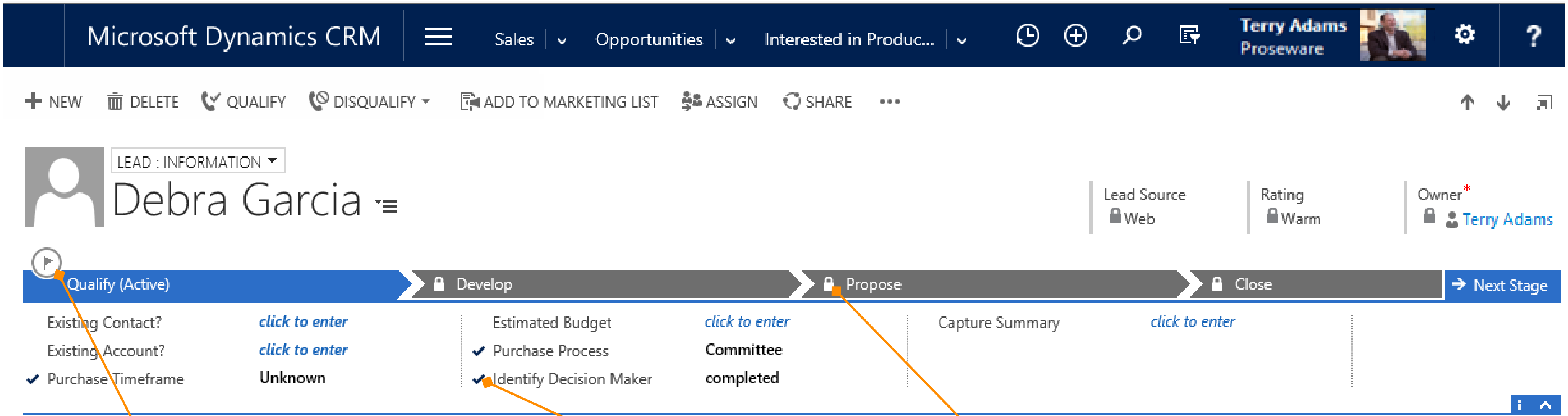
...and then select an existing lead



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
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.



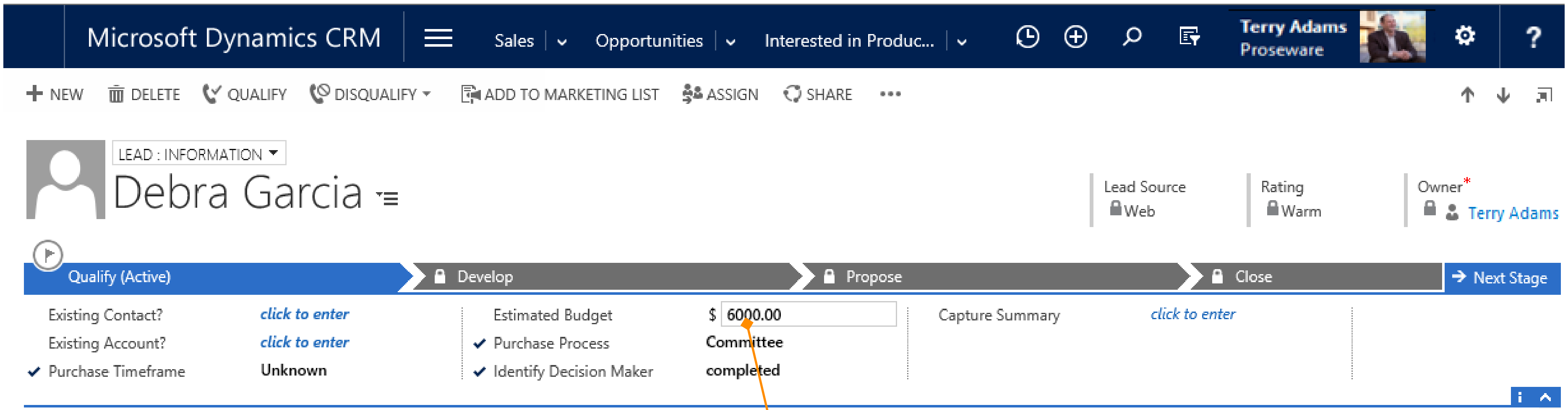
A flag shows the current stage.

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.

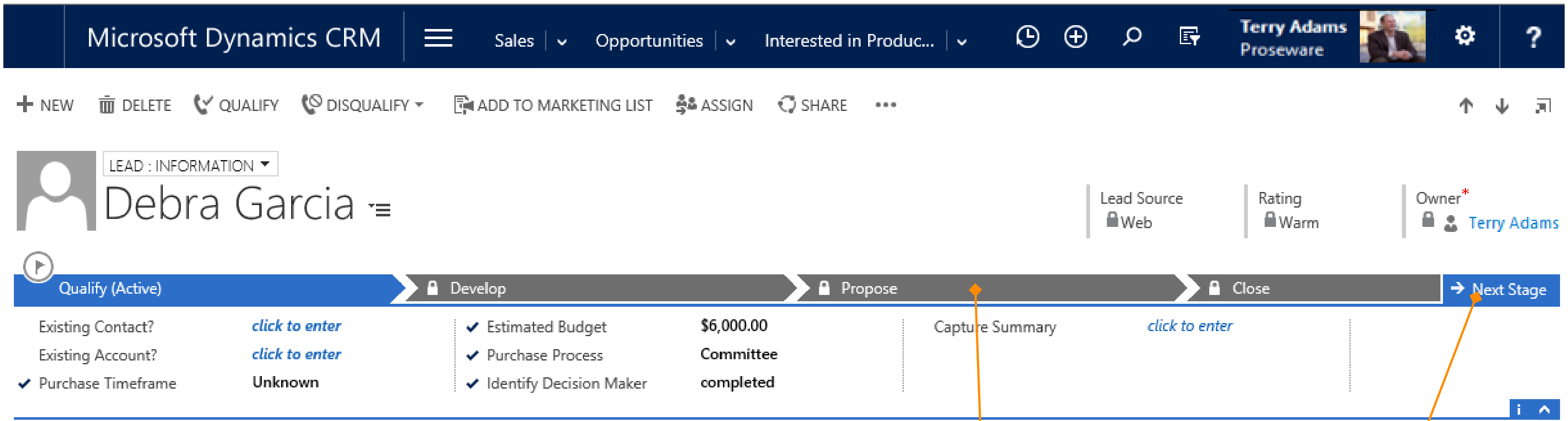


Choose a field within a step to type in details.

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.

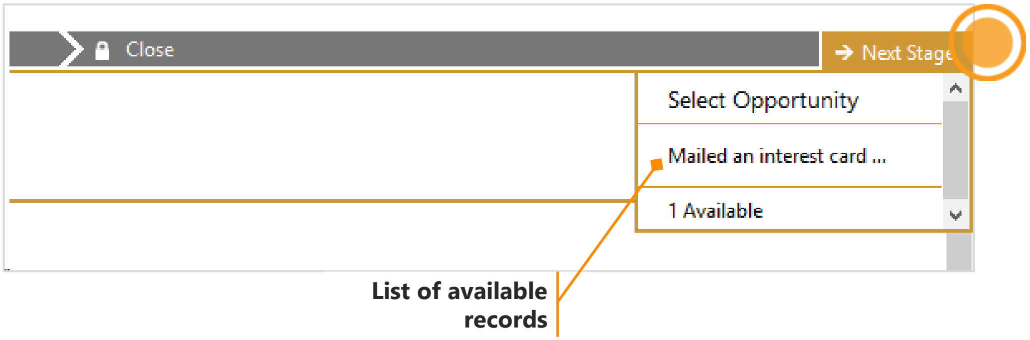


Choose a stage to preview the steps in it.

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

advance through the stages

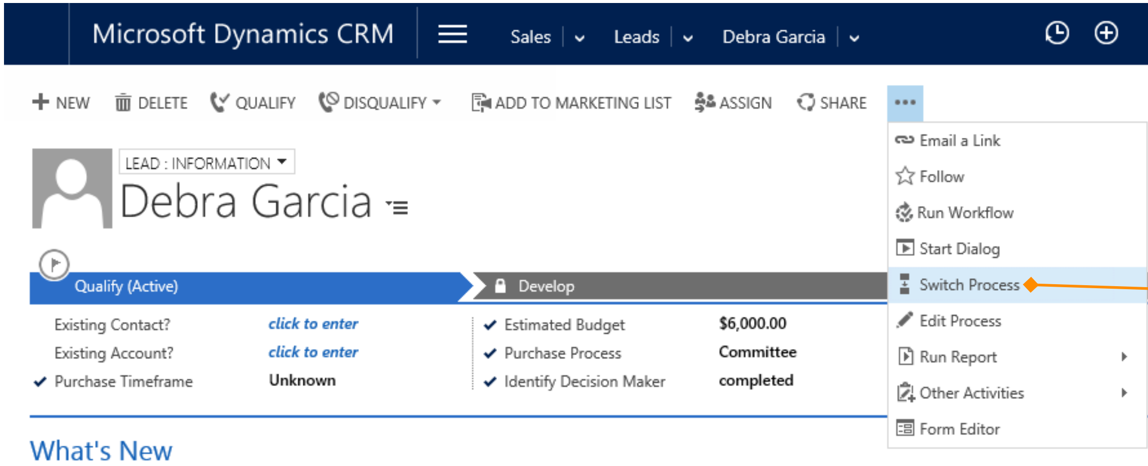
When you've completed all the steps, you'll need to advance to the next stage. You can move to another record type – for example, a lead can become an opportunity as you nurture a deal.



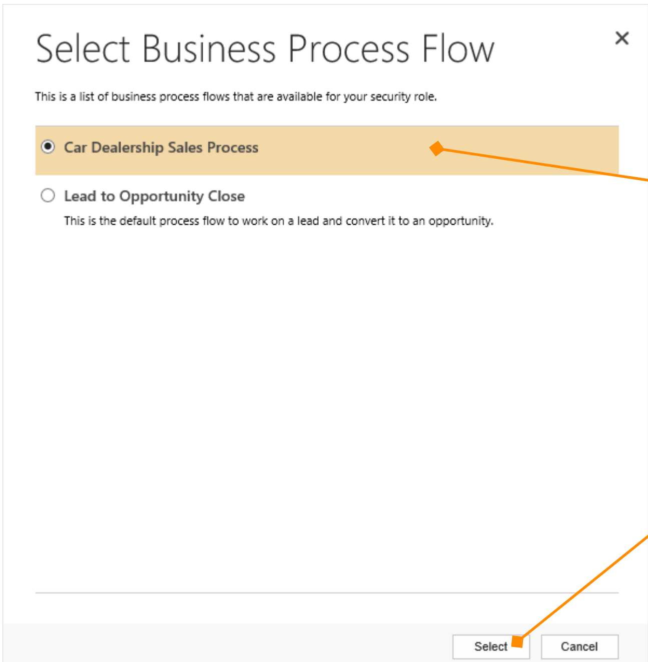
1 Click or tap **Next Stage**, and then select the next record type.

switch to another business process

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



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



Select a different process.

Choose **Select**.

Thanks for reading!

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We'd love to know what you think.

CRM Help & Training site

Version 7.1.1