Business processes

Follow consistent steps every time you work with your customers.

Microsoft Dynamics CRM

Getting Started Series

3

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.

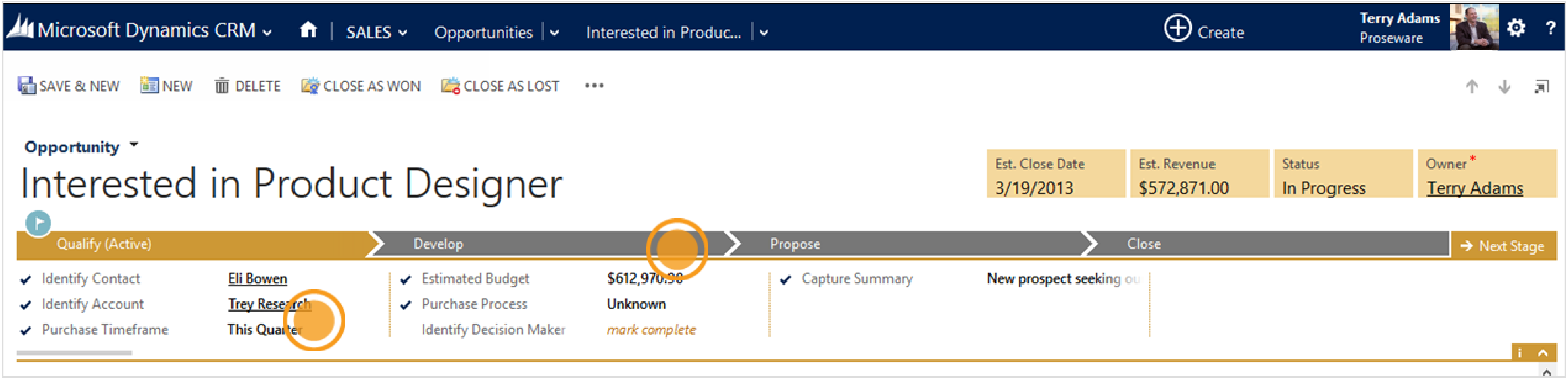
For example, your organization may want everyone to handle new sales leads or service cases the same way. Business processes help you do that.

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 2013 & Microsoft Dynamics CRM Online Fall ‘13

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.

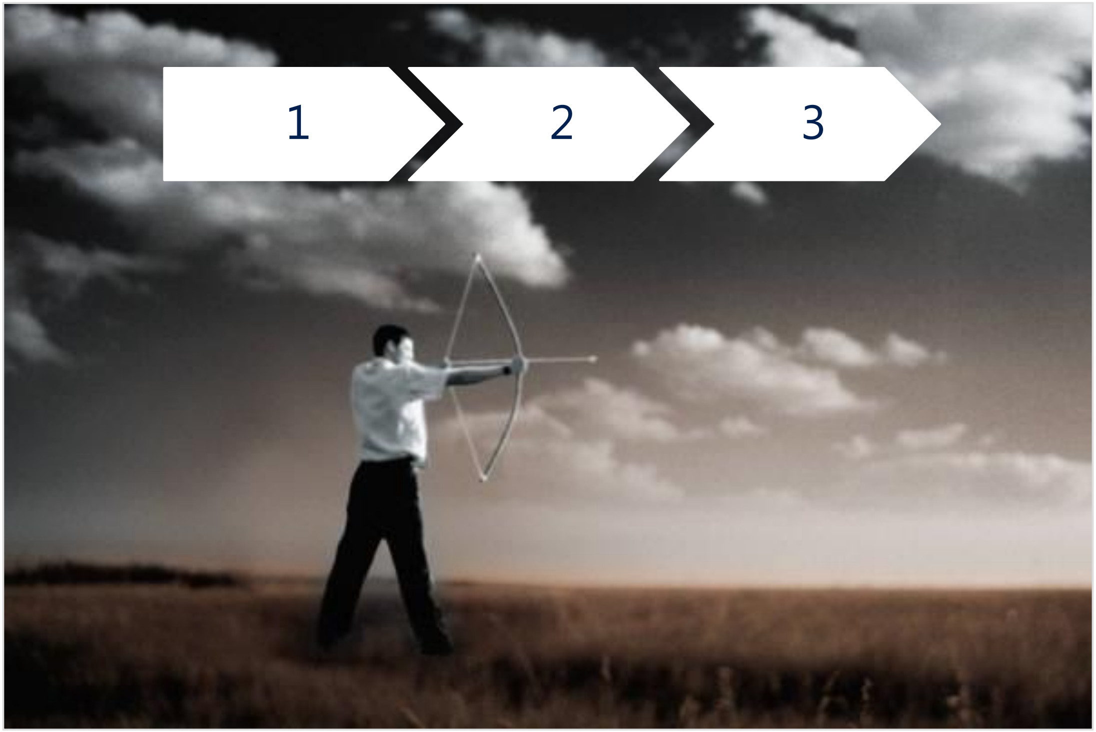


1 Click or tap a field to enter data as you handle the details

2 Click or tap the process bar to see the steps in a stage

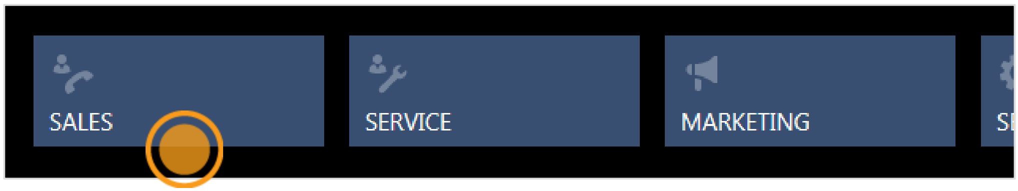
look at an example

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 business process for a lead …



first, go to the sales work area

1 On the nav bar, click or tap the **Microsoft Dynamics CRM** logo,



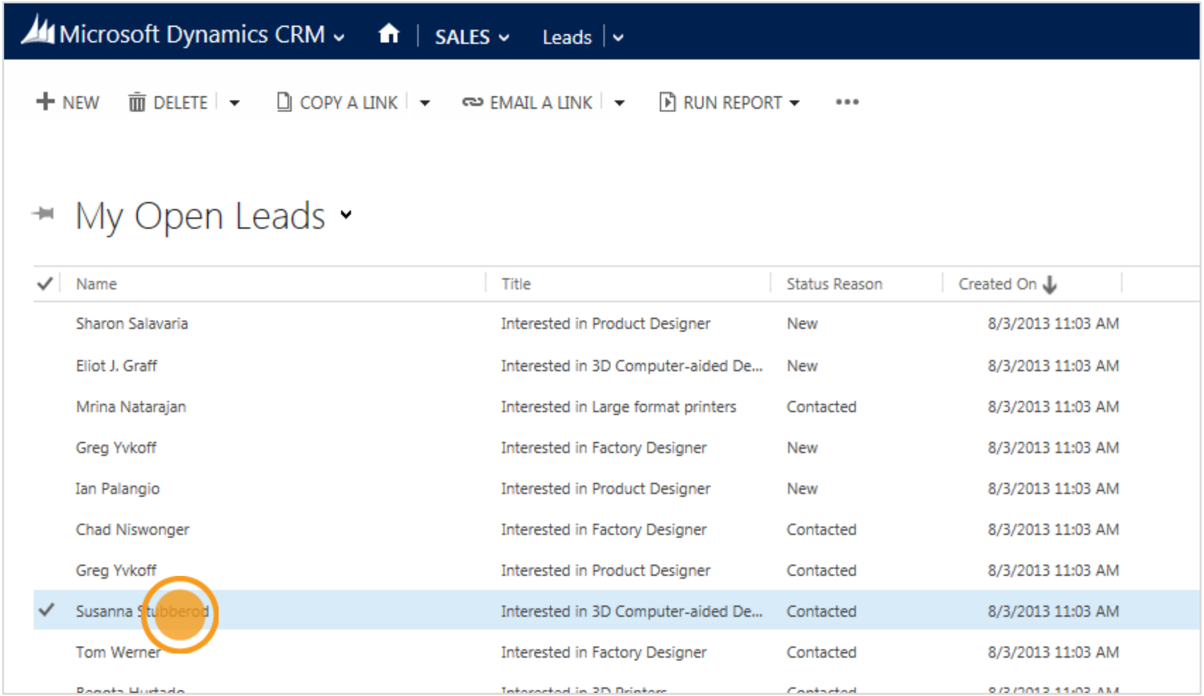
2 and then click or tap **Sales**.

...then go to leads

1 On the nav bar, click or tap **Sales**,

2 and then click or tap **Leads**.

...and then select an existing lead

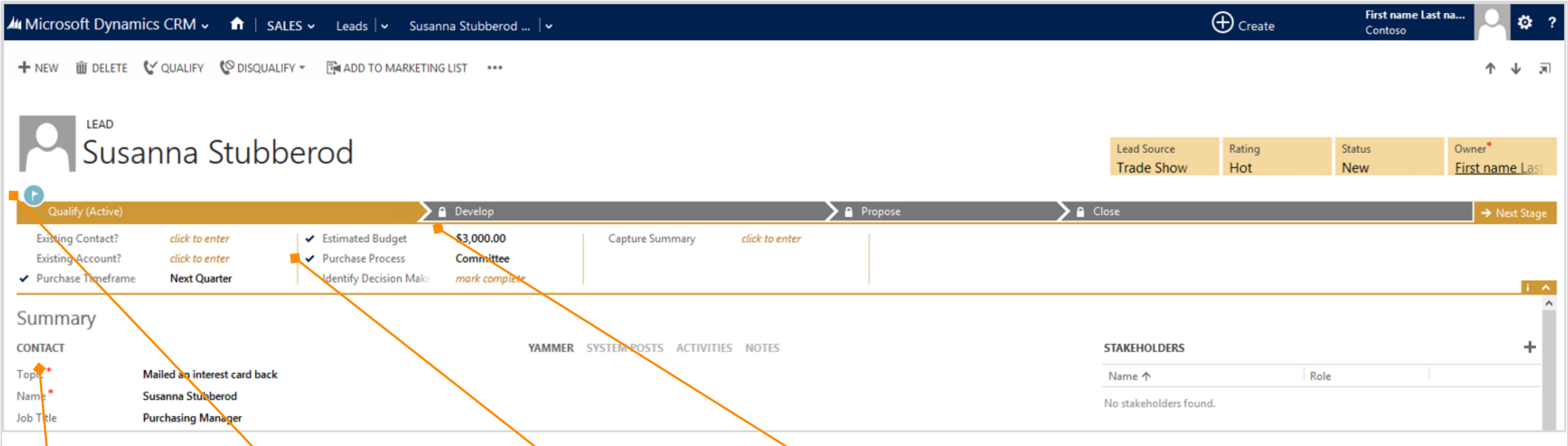


TIP

If you don't have any leads yet, use the **Quick Create** command on the nav bar to create one.

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.



An asterisk indicates that a field or step is required.

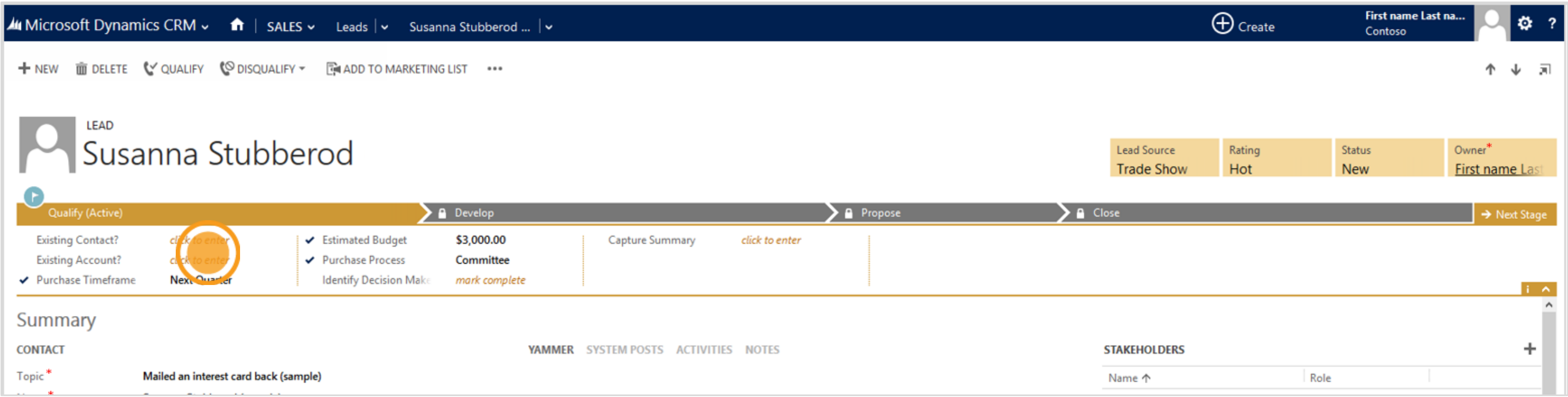
A flag indicates the current stage.

A check mark indicates that the step is complete.

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

enter data to complete each step

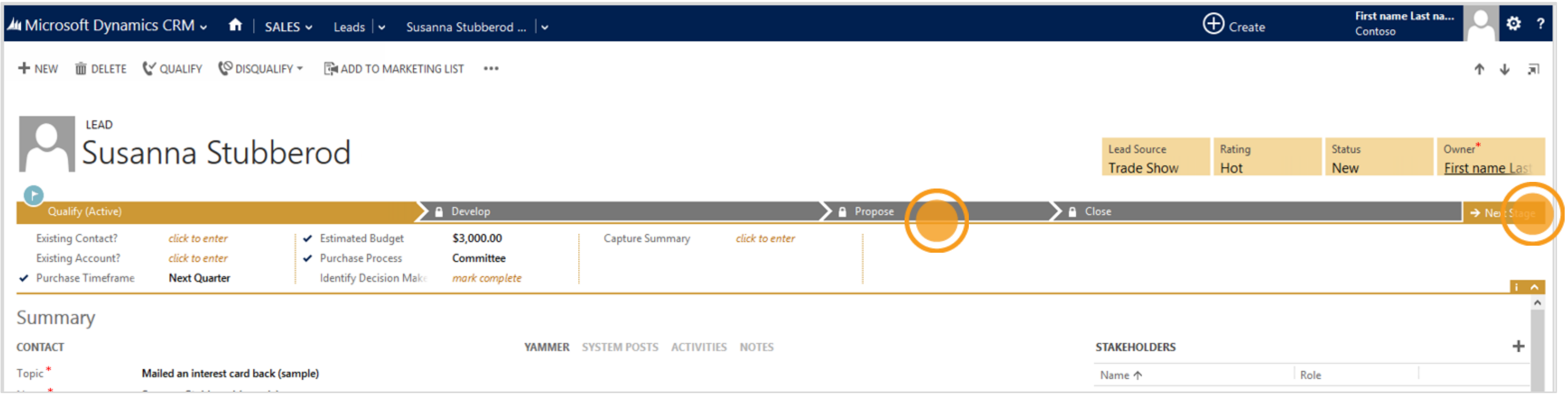
You can edit fields directly on the process bar.



1 Click or tap a field for a step to enter data. 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.

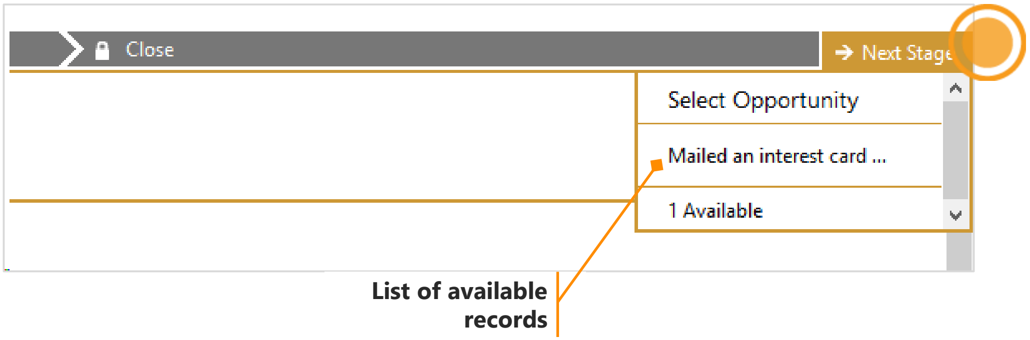


1 Click or tap a stage to preview the steps in it.

2 Click or tap **Next Stage** to advance through the process.

advance through the stages

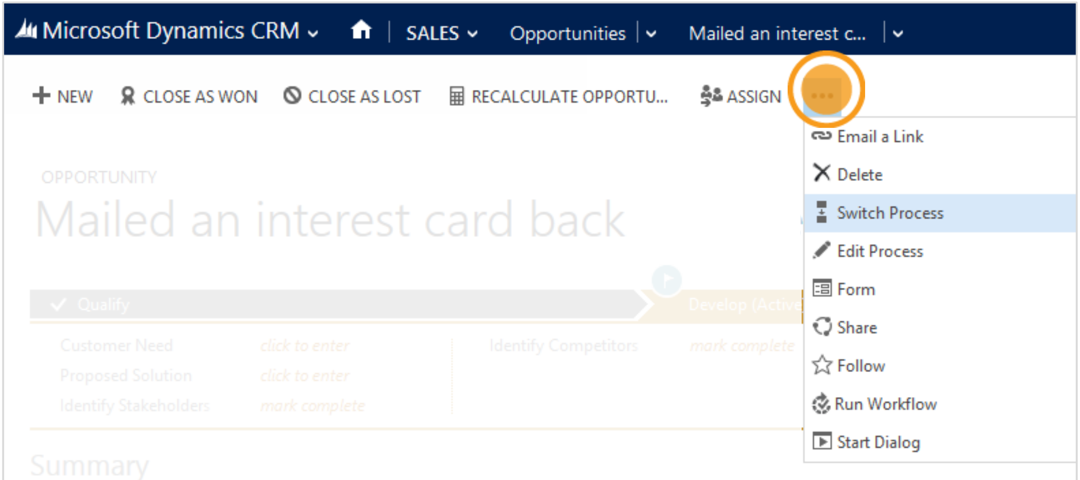
When you've completed all the steps, you'll need to advance to the next stage. You can move to another record type – for example, a lead can become an opportunity as you nurture a deal.



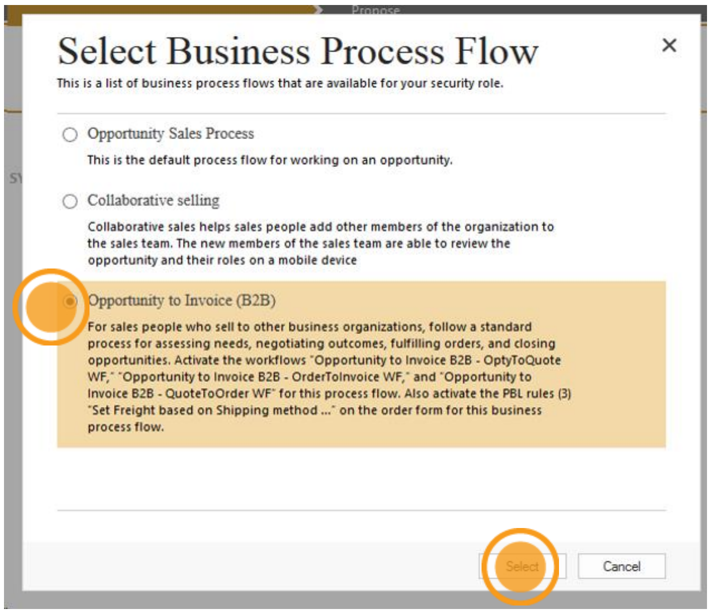
1 Click or tap **Next Stage**, and then select the next record type.

switch to another business process

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



1 Click or tap **More Commands** (**...**), and then select **Switch Process**.



2 Select a different process.

3 Click or tap **Select**.

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