

# Business processes

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. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Opportunities', and a dropdown menu for 'Interested in Product...'. The right side of the header shows the user 'Terry Adams' from 'Proseware' and a 'Create' button. Below the header, a toolbar contains actions like 'SAVE & NEW', 'NEW', 'DELETE', 'CLOSE AS WON', and 'CLOSE AS LOST'. The main content area shows the Opportunity title 'Interested in Product Designer' and a 'Process Bar' with stages: 'Qualify (Active)', 'Develop', 'Propose', and 'Close'. The 'Develop' stage is currently active and highlighted. Below the process bar, a table lists steps and their completion status:

Step	Completion Status
Identify Contact	Completed (checked)
Identify Account	Completed (checked)
Purchase Timeframe	Completed (checked)
Estimated Budget	Completed (checked)
Purchase Process	Completed (checked)
Identify Decision Maker	Completed (checked)
Capture Summary	Completed (checked)

Additional details visible include 'Est. Close Date: 3/19/2013', 'Est. Revenue: \$572,871.00', 'Status: In Progress', and 'Owner: Terry Adams'. The 'Next Stage' button is located at the end of the process bar.

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

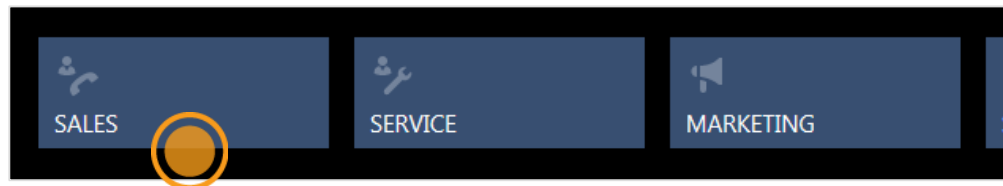
The best way to learn about how business processes help you work with customers is to look at an example. Let's look at a business process for a lead ...



# first, go to the sales work area



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



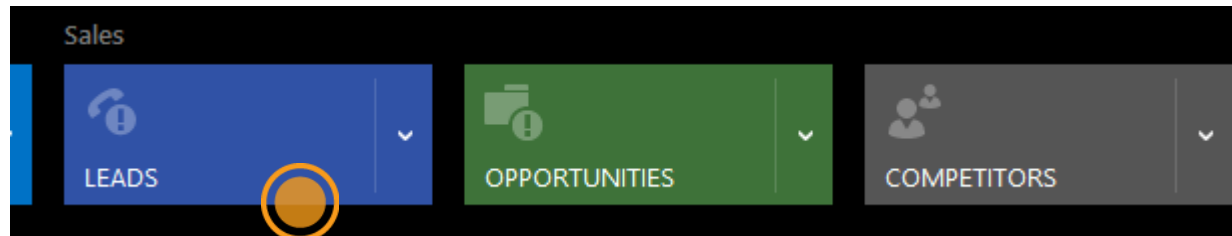
- 2 and then click or tap **Sales**.



# ...then go to leads



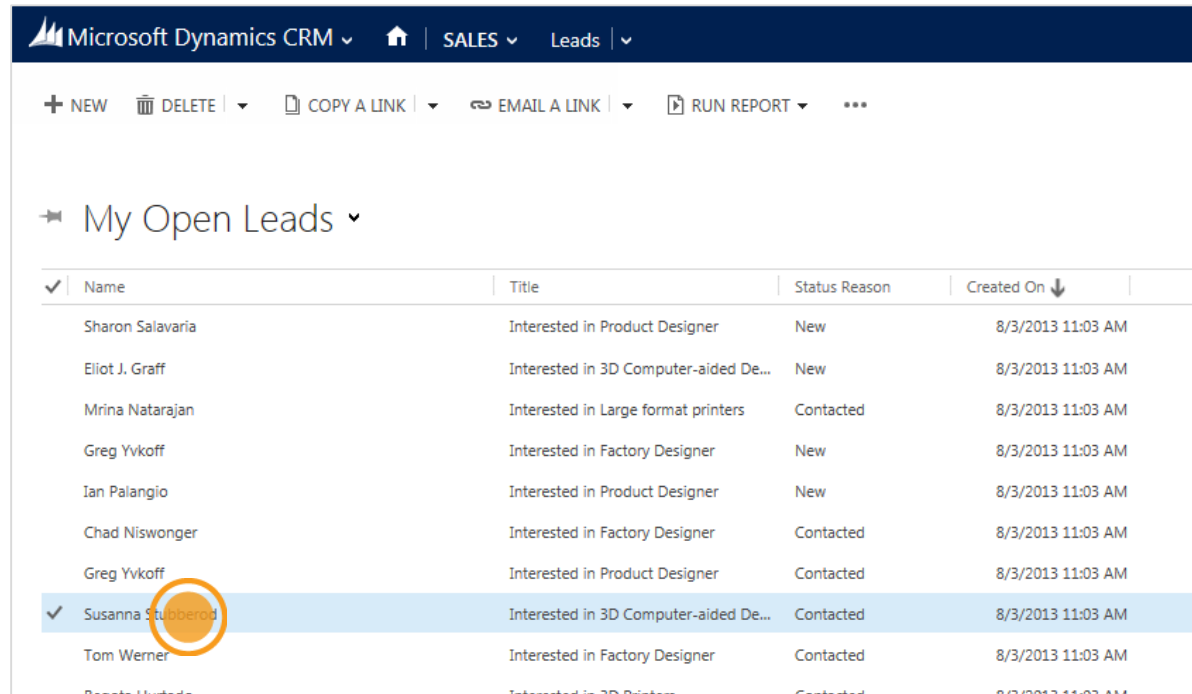
1 On the nav bar, click or tap **Sales**,



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

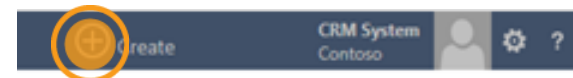


# ...and then select an existing lead



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there's a navigation bar with 'Microsoft Dynamics CRM', a home icon, and tabs for 'SALES' and 'Leads'. Below this is a toolbar with buttons for '+ NEW', 'DELETE', 'COPY A LINK', 'EMAIL A LINK', 'RUN REPORT', and a menu icon. The main section is titled 'My Open Leads'. Below the title is a table with columns: 'Name', 'Title', 'Status Reason', and 'Created On'. The table contains several rows of lead data. The row for 'Susanna Stubbord' is highlighted with a blue background, and a yellow circle is drawn around the 'Susanna Stubbord' name.

✓	Name	Title	Status Reason	Created On ↓
	Sharon Salavaria	Interested in Product Designer	New	8/3/2013 11:03 AM
	Eliot J. Graff	Interested in 3D Computer-aided De...	New	8/3/2013 11:03 AM
	Mrina Natarajan	Interested in Large format printers	Contacted	8/3/2013 11:03 AM
	Greg Yvkoff	Interested in Factory Designer	New	8/3/2013 11:03 AM
	Ian Palangio	Interested in Product Designer	New	8/3/2013 11:03 AM
	Chad Niswonger	Interested in Factory Designer	Contacted	8/3/2013 11:03 AM
	Greg Yvkoff	Interested in Product Designer	Contacted	8/3/2013 11:03 AM
✓	Susanna Stubbord	Interested in 3D Computer-aided De...	Contacted	8/3/2013 11:03 AM
	Tom Werner	Interested in Factory Designer	Contacted	8/3/2013 11:03 AM
	Rebecca Murtada	Interested in 3D Printers	Contacted	8/3/2013 11:03 AM



## 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.

The screenshot shows a Microsoft Dynamics CRM interface for a Lead record. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Leads', and the user 'Susanna Stubberod'. The main header shows the lead's name 'Susanna Stubberod' and metadata: Lead Source (Trade Show), Rating (Hot), Status (New), and Owner (First name Last name). Below this is a process bar with stages: Qualify (Active), Develop, Propose, and Close. The 'Qualify' stage is expanded, showing a list of tasks: 'Existing Contact?' (with an asterisk), 'Existing Account?' (with an asterisk), 'Purchase Timeframe' (with a checkmark), 'Estimated Budget' (with a checkmark and value \$3,000.00), 'Purchase Process' (with a checkmark), and 'Identify Decision Maker' (with a checkmark and 'mark complete'). The 'Develop' stage is locked, indicated by a lock icon. Below the process bar is a 'Summary' section with a 'CONTACT' tab showing details for Susanna Stubberod, including 'Mailed an interest card back'. To the right is a 'STAKEHOLDERS' section with a table header 'Name' and 'Role', and a message 'No stakeholders found.'.

Microsoft Dynamics CRM | SALES | Leads | Susanna Stubberod ... | Create | First name Last name Contoso

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ...

LEAD  
Susanna Stubberod

Lead Source: Trade Show | Rating: Hot | Status: New | Owner: First name Last name

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

Existing Contact? *click to enter* | Existing Account? *click to enter* | ✓ Purchase Timeframe **Next Quarter** | ✓ Estimated Budget **\$3,000.00** | Purchase Process **Committee** | Identify Decision Maker *mark complete* | Capture Summary *click to enter*

Summary

CONTACT | YAMMER | SYSTEM ROLES | ACTIVITIES | NOTES

Topic \* | Mailed an interest card back  
Name \* | Susanna Stubberod  
Job Title | Purchasing Manager

STAKEHOLDERS

Name ↑	Role
No stakeholders found.	

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.

Microsoft Dynamics CRM | SALES | Leads | Susanna Stubberod ... | Create | First name Last na... Contoso

+ NEW | DELETE | QUALIFY | DISQUALIFY | ADD TO MARKETING LIST | ...

LEAD  
Susanna Stubberod

Lead Source: Trade Show | Rating: Hot | Status: New | Owner: First name Last

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

Existing Contact? [click to enter](#) | Estimated Budget: \$3,000.00 | Capture Summary: [click to enter](#)  
Existing Account? [click to enter](#) | Purchase Process: Committee | Identify Decision Maker: [mark complete](#)  
✓ Purchase Timeframe: Next Quarter

Summary

CONTACT | YAMMER | SYSTEM POSTS | ACTIVITIES | NOTES

Topic: Mailed an interest card back (sample)

STAKEHOLDERS

Name ↑	Role
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- 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.

The screenshot shows the Microsoft Dynamics CRM interface for a Lead record named 'Susanna Stubberod'. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Leads', and the user 'Susanna Stubberod'. The main header shows the lead's name and a 'Next Stage' button. Below this is a progress bar with stages: 'Qualify (Active)', 'Develop', 'Propose', and 'Close'. The 'Propose' stage is highlighted with an orange circle. Below the progress bar, there are fields for 'Existing Contact?', 'Existing Account?', 'Purchase Timeframe', 'Estimated Budget', 'Purchase Process', and 'Identify Decision Maker'. The 'Next Stage' button is also highlighted with an orange circle. The bottom section shows a 'Summary' tab with a 'CONTACT' sub-tab and a 'STAKEHOLDERS' table.

Lead Source	Rating	Status	Owner
Trade Show	Hot	New	First name Last

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

Field	Value
Existing Contact?	click to enter
Existing Account?	click to enter
Purchase Timeframe	Next Quarter
Estimated Budget	\$3,000.00
Purchase Process	Committee
Identify Decision Maker	mark complete

Topic	Content
Mailed an interest card back (sample)	

Name	Role
------	------

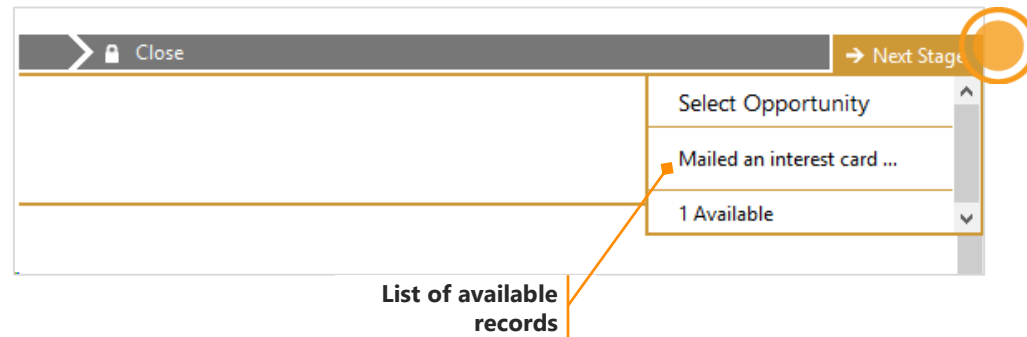
1 Click or tap a stage to preview the steps in it.

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.

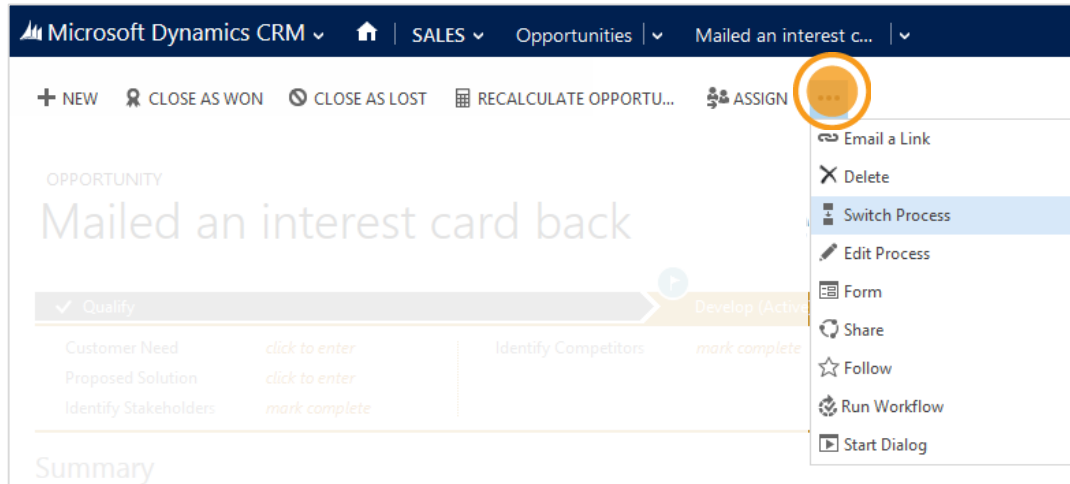


- 1 Click or tap **Next Stage**, and then select the next record type.

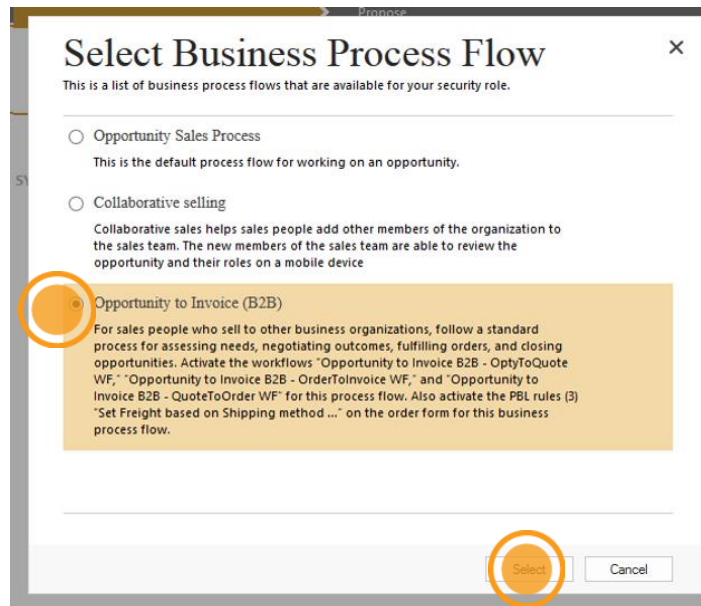


# switch to another business process

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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