

# 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 menu icon, 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 below 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 'Estimated Budget' at \$612,970.00 and 'Purchase Process' as 'Unknown' with a 'mark complete' link. The 'Propose' stage shows 'Capture Summary' as complete. The 'Close' stage shows 'New prospect seeking ou'.

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.

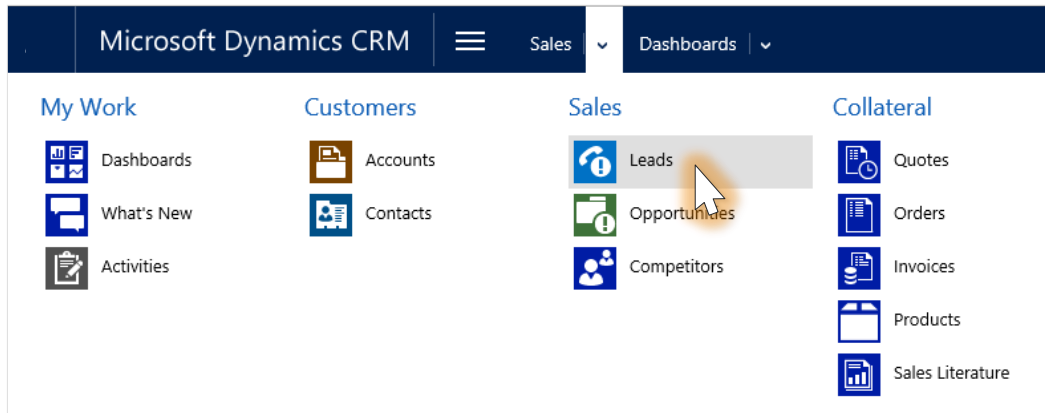
Let's look at a standard business process for working with leads.



# first, go to your leads

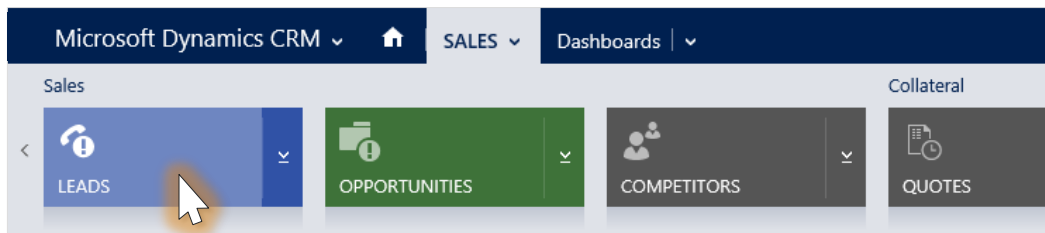
If your screen looks like this (latest version):

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
<a href="#">Contoso Pharmaceuticals</a>	You have been unsubscribed...	New	3/18/2015 12:40 AM
<a href="#">Counts Vong</a>	Follow-up with information regardin...	New	1/1/2015 7:08 PM
<input checked="" type="checkbox"/> <a href="#">Debra Garcia</a>	Store is expanding - send new literat...	New	1/1/2015 7:08 PM
<a href="#">Ian Palangio</a>	Store expanding	New	3/17/2015 10:10 PM
<a href="#">Ivan Komashinsky</a>	Interested in our newer offerings	New	1/1/2015 7:08 PM
<a href="#">Lidman Anna</a>	Some interest in our products	New	1/1/2015 7:08 PM
<a href="#">Nancy Anderson</a>	New store opened this year - follow...	New	1/1/2015 7:08 PM
<a href="#">Peter Houston</a>	Good prospect	New	1/1/2015 7:08 PM
<a href="#">Robin Counts</a>	Likes our products	New	1/1/2015 7:08 PM
<a href="#">Susanna Stubberod</a>	Mailed an interest card back	New	1/1/2015 7:08 PM
<a href="#">Tom Werner</a>	Interested in products	New	3/18/2015 12:44 AM
<a href="#">Yvonne McKay</a>	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 lead source is 'Web', the rating is 'Warm', and the owner is 'Terry Adams'. The process bar shows four stages: 'Qualify (Active)', 'Develop', 'Propose', and 'Close'. The 'Qualify (Active)' stage has a play button icon and a list of tasks: 'Existing Contact?' (click to enter), 'Existing Account?' (click to enter), and 'Purchase Timeframe' (Unknown). The 'Develop' stage has a lock icon and a list of tasks: 'Estimated Budget' (click to enter), 'Purchase Process' (Committee completed), and 'Identify Decision Maker' (completed). The 'Propose' stage has a lock icon and a task: 'Capture Summary' (click to enter). The 'Close' stage has a lock icon and a 'Next Stage' button.

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?	<a href="#">click to enter</a>	Estimated Budget	\$ 6000.00	Capture Summary	<a href="#">click to enter</a>
Existing Account?	<a href="#">click to enter</a>	✓ 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.

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? <a href="#">click to enter</a>	✓ Estimated Budget	\$6,000.00	Capture Summary	<a href="#">click to enter</a>
Existing Account? <a href="#">click to enter</a>	✓ Purchase Process	Committee completed		
✓ Purchase Timeframe Unknown	✓ Identify Decision Maker			

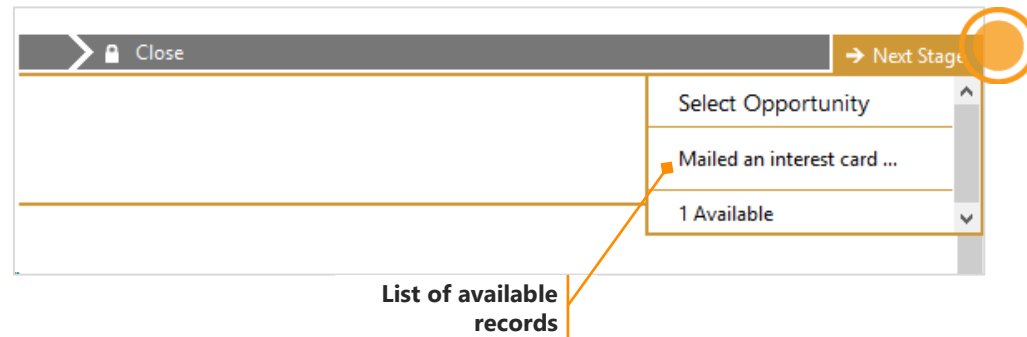
Choose a stage to preview the steps in it.

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?	<a href="#">click to enter</a>	✓ Estimated Budget	\$6,000.00
Existing Account?	<a href="#">click to enter</a>	✓ 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**.



Thanks for reading!

Did this eBook help you?

[Send us a quick note.](#)

We'd love to know what you think.

[CRM Help & Training site](#)

Version 7.1.1





This document is provided "as-is". Information and views expressed in this document, including URL and other Internet Web site references, may change without notice.

Some examples depicted herein are provided for illustration only and are fictitious. No real association or connection is intended or should be inferred.

This document does not provide you with any legal rights to any intellectual property in any Microsoft product. You may copy and use this document for your internal, reference purposes.

The videos and eBooks might be in English only. Also, if you click the links, you may be redirected to a U.S. website whose content is in English.

© 2015 Microsoft. All rights reserved.

Microsoft, Excel, Internet Explorer, Microsoft Dynamics, Outlook, and Windows are trademarks of the Microsoft group of companies.

All other trademarks are property of their respective owners.