

Customize a business process in CRM

Make Microsoft Dynamics CRM
processes match the way your
organization works



For
managers
and admins

contents

Provide your sales or service reps with a well-defined process to take the guesswork out of their day-to-day activities. Microsoft Dynamics CRM includes ready-to-use business processes that you can customize to match how your organization works.

Follow these steps to customize your own business process:

- [What is a business process?](#)
- [The basics of customizing a business process](#)
- [Now let's add a branch](#)
- [Make your business process available for use](#)
- [Next steps](#)



what is a business process?

OPPORTUNITY

Some interest in our products (sample)

Est. Close Date	--	Est. Revenue	--	Status	In Progress	Owner*	Nancy Buch
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Qualify → **Develop (Active)** → Propose → Close → Next Stage

Customer Need	click to enter	Identify Competitors	mark complete
Proposed Solution	click to enter		
Identify Stakeholders	mark complete		

i ^

Business processes help you and everyone on your team follow best practices by guiding you through consistent stages and steps for common tasks.

For example, your organization may want everyone to follow the same steps to qualify new sales leads or to resolve service cases.

Business processes help you do that.

Note: You'll need the Manager, Vice President, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions to do the tasks in this guide.

Not sure you have the right permissions?

[View your user profile](#)

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



see your next steps – no guesswork!

OPPORTUNITY

Some interest in our products (sample)

Est. Close Date	Est. Revenue	Status	Owner*
--	--	In Progress	Nancy Buc

Qualify Develop (Active) Propose Close Next Stage

Customer Need	<i>click to enter</i>	Identify Competitors	<i>mark complete</i>
Proposed Solution	<i>click to enter</i>		
Identify Stakeholders	<i>mark complete</i>		

Process bar

You'll see the process bar at the top of the screen when you work on certain types of records—for example, leads or opportunities.

The process bar shows you where a customer is in the process, and the next steps you need to take. You enter necessary information and mark completed steps in the process bar as you go.

It's your roadmap for getting things done.

Want a short, visual guide that introduces business processes?

Check out the [eBook: Business Processes](#).



adapt a process to match your business

There are several business processes available for common customer interactions, with the stages and steps already mapped out for you.

But what if you need to change a business process to make it match the way your organization does things?

This guide shows you how.



the basics of customizing a business process

The best way to learn how to customize a business process is to start with an example.

In this guide, we'll show you how to change the Lead to Opportunity Sales Process to add a stage to create a proposal for a lead.

The Lead to Opportunity Sales Process is a ready-to-use process provided by CRM. It's a template you can change to match how you do business.

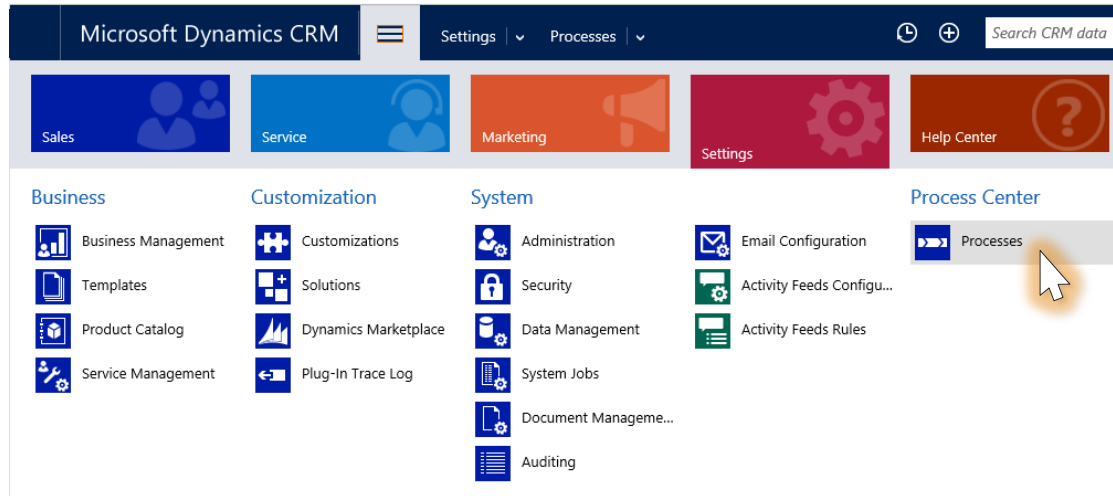
Let's get started!



go to the list of processes

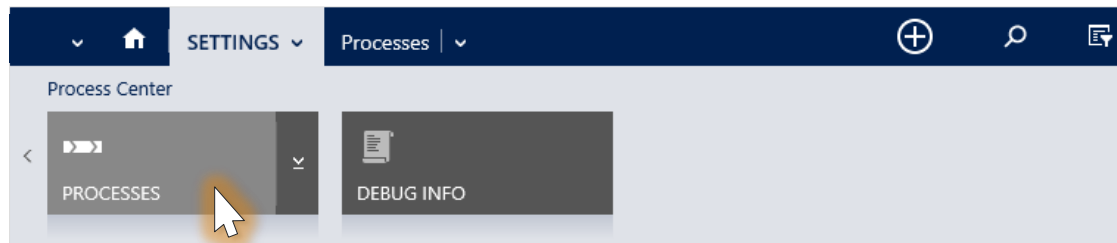
If your screen looks like this (latest version):

Go to **Settings > Processes**.

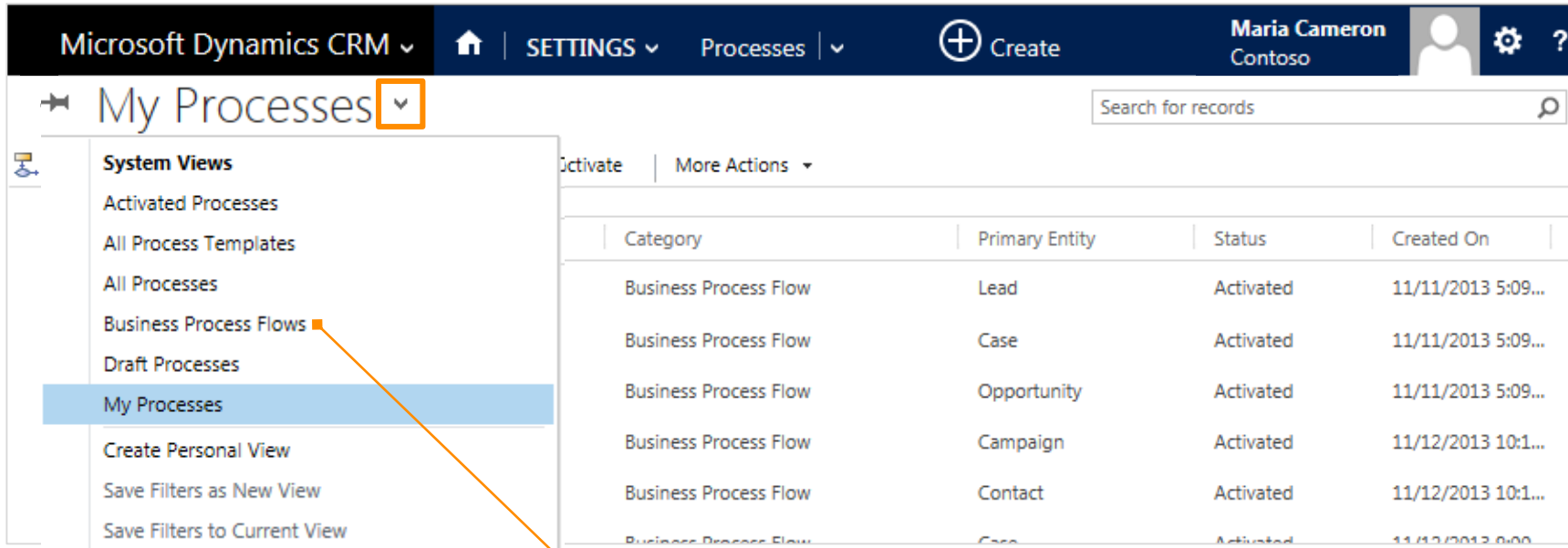


If your screen looks like this (older version):

Go to **Microsoft Dynamics CRM > Settings > Processes**.



view the list of business processes



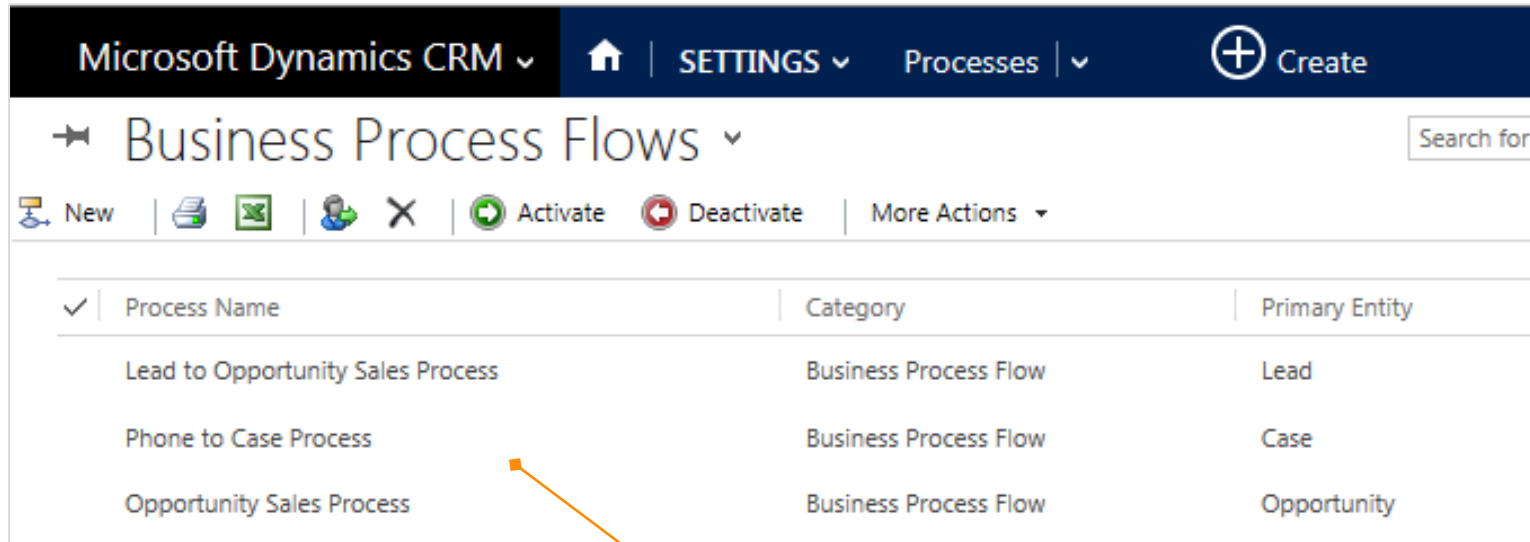
The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SETTINGS', 'Processes', and a 'Create' button. The user's name 'Maria Cameron' and organization 'Contoso' are displayed. The main area is titled 'My Processes' with a dropdown arrow. A search bar for records is visible. A dropdown menu is open, showing 'System Views' with options: 'Activated Processes', 'All Process Templates', 'All Processes', 'Business Process Flows', 'Draft Processes', 'My Processes', 'Create Personal View', 'Save Filters as New View', and 'Save Filters to Current View'. An orange arrow points from 'Business Process Flows' in the dropdown to the 'Business Process Flows' row in the table below. The table has columns: 'Category', 'Primary Entity', 'Status', and 'Created On'. The table contains several rows of 'Business Process Flow' entries for various entities like Lead, Case, Opportunity, Campaign, and Contact, all with a status of 'Activated'.

Category	Primary Entity	Status	Created On
Business Process Flow	Lead	Activated	11/11/2013 5:09...
Business Process Flow	Case	Activated	11/11/2013 5:09...
Business Process Flow	Opportunity	Activated	11/11/2013 5:09...
Business Process Flow	Campaign	Activated	11/12/2013 10:1...
Business Process Flow	Contact	Activated	11/12/2013 10:1...
Business Process Flow	Case	Activated	11/12/2013 5:09...

To see a list of all the business processes installed on your system, choose the arrow, and then select **Business Process Flows**.



select the business process to edit



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a dark blue header with 'Microsoft Dynamics CRM' and navigation options like 'SETTINGS' and 'Processes'. Below this is a white bar with 'Business Process Flows' and a search box. A toolbar contains icons for 'New', 'Print', 'Export', 'Share', 'Close', 'Activate', and 'Deactivate'. The main content is a table with three columns: 'Process Name', 'Category', and 'Primary Entity'. Three rows are visible, with the first row highlighted. An orange arrow points from the text below to the first row.

✓	Process Name	Category	Primary Entity
	Lead to Opportunity Sales Process	Business Process Flow	Lead
	Phone to Case Process	Business Process Flow	Case
	Opportunity Sales Process	Business Process Flow	Opportunity

Choose a business process in the list to look at and edit its stages and steps.

In our example, we've chosen the **Lead to Opportunity Sales** process.



get to know the business process editor

You can edit details like the business process name and description.

Each box is a **stage** in the business process. Choose **Stage Name** to change the name.

Each stage contains **steps**.

If your process needs to change under certain conditions, you can create a **branch** with different stages, and then merge back into your main process.

BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details ▾

Stage Name *	Step Name	Value	Required
Qualify	Existing Contact?	Existing Contact?	<input type="checkbox"/>
Entity * Lead	Existing Account?	Existing Account?	<input type="checkbox"/>
Stage Category Qualify	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
	Estimated Budget	Budget Amount	<input type="checkbox"/>
	Purchase Process	Purchase Process	<input type="checkbox"/>
	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
	Capture Summary	Description	<input type="checkbox"/>

+ Insert stage Add branch

Stage Name *	Step Name	Value	Required
Develop	Customer Need	Customer Need	<input type="checkbox"/>
Entity * Opportunity	Proposed Solution	Proposed Solution	<input type="checkbox"/>
Relationship <u>Select relationships</u>	Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
Stage Category Develop	Identify Competitors	Identify Competitors	<input type="checkbox"/>

+ Insert stage Add branch

Stage Name *	Step Name	Value	Required
Propose	Identify Sales Team	Identify Sales Team	<input type="checkbox"/>
Entity * Opportunity	Develop Proposal	Develop Proposal	<input type="checkbox"/>
Relationship <u>Select relationships</u>	Complete Internal Review	Complete Internal Review	<input type="checkbox"/>
	Present Proposal	Presented Proposal	<input type="checkbox"/>



add a new stage to your process

BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details ▾

Stage Name* **Qualify**

Entity* **Lead**

Stage Category **Qualify**

Step Name	Value	Required
Existing Contact?	Existing Contact?	<input type="checkbox"/>
Existing Account?	Existing Account?	<input type="checkbox"/>
Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Estimated Budget	Budget Amount	<input type="checkbox"/>
Purchase Process	Purchase Process	<input type="checkbox"/>
Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
Capture Summary	Description	<input type="checkbox"/>

+ Add step

+ Insert stage Add branch

Stage Name* **Develop**

Entity* **Opportunity**

Relationship **Select relationships**

Stage Category **Develop**

Step Name	Value	Required
Customer Need	Customer Need	<input type="checkbox"/>
Proposed Solution	Proposed Solution	<input type="checkbox"/>
Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
Identify Competitors	Identify Competitors	<input type="checkbox"/>

+ Add step

+ Insert stage Add branch

In our example, we want to add a stage called **Generate Proposal** after the **Develop** stage. This new stage includes the steps for drafting a proposal to send a lead who is almost ready to buy.

Choose **Insert stage**.



name your new stage

The image shows two screenshots of a software interface for managing stages. The top screenshot shows a stage named 'Develop' with the following steps:

Step Name	Value	Required
Customer Need	Customer Need	<input type="checkbox"/>
Proposed Solution	Proposed Solution	<input type="checkbox"/>
Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
Identify Competitors	Identify Competitors	<input type="checkbox"/>

The bottom screenshot shows a stage named 'Generate Proposal' with the following step:

Step Name	Value	Required
New Step	Select to enter data	<input type="checkbox"/>

An orange arrow points from the text on the right to the 'Generate Proposal' stage name in the bottom screenshot.

Type a name for the new stage.
In our example, the stage is called **Generate Proposal**.



base your new stage on an entity

Stage Name*
Develop

Entity*
Opportunity

Relationship
Select relationships

Stage Category
Develop

Step Name	Value	Required
Customer Need	Customer Need	<input type="checkbox"/>
Proposed Solution	Proposed Solution	<input type="checkbox"/>
Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
Identify Competitors	Identify Competitors	<input type="checkbox"/>

+ Insert stage ↶ Add branch

Stage Name*
Generate Proposal

Entity*
Fax
Invoice
Lead
Letter
Marketing List
Opportunity
Order
Phone Call
Price List Item
Product

Step Name	Value	Required
New Step	<i>Select to enter data</i>	<input type="checkbox"/>

+ Insert stage ↶ Add branch

Select an **entity** (record type) to base the stage on. We're basing this one on **Opportunity**. The entity you select affects the fields available for the steps you add later on.

Choose the field under **Entity** and then select the one you want.



select a category for your new stage

Stage Name*
Develop

Entity*
Opportunity

Relationship
Select relationships

Stage Category
Develop

+ Insert stage Add branch

Stage Name*
Generate Proposal

Entity*
Opportunity

Relationship
Select relationships

Stage Category
Qualify
Develop
Propose
Close
Identify
Research
Resolve
Propose

Step Name	Value	Required
Customer Need	Customer Need	<input type="checkbox"/>
Proposed Solution	Proposed Solution	<input type="checkbox"/>
Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
Identify Competitors	Identify Competitors	<input type="checkbox"/>

+ In

Step Name	Value	Required
Identify Sales Team	Identify Sales Team	<input type="checkbox"/>

A category lets you group stages by a type of action.

In our example, we'll select **Develop**.

Choose the field under **Stage Category** and then select the one that fits best.



add steps to your new stage

The top screenshot shows a stage named "Develop" with the following steps:

Step Name	Value	Required
Customer Need	Customer Need	<input type="checkbox"/>
Proposed Solution	Proposed Solution	<input type="checkbox"/>
Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
Identify Competitors	Identify Competitors	<input type="checkbox"/>


The bottom screenshot shows the same stage with a new step "Develop Proposal" being added. A dropdown menu is open for the "Value" column, showing the following options:

- Decision Maker?
- Description
- Develop Proposal
- Est. Close Date
- Est. Revenue
- Est. Revenue (Base)

In the **Step Name** column, choose the field and type a descriptive name for the step. This will appear on the process bar.

In the **Value** column, choose the field, and then select a field to use for data entry. If applicable, select the **Required** check box for any required field.

In our example, we'll just add one step called **Develop Proposal**.

If you need to add more steps, choose the **Add** button  below the last step.



now let's add a branch

If you want a stage that appears only under certain conditions, you can add a branch to your business process. When you add a branch, you also set the conditions for which it appears.



create a branch in your process

BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details ▾

Stage Name*
Qualify

Entity*
Lead

Stage Category
Qualify

Step Name	Value	Required
Existing Contact?	Existing Contact?	<input type="checkbox"/>
Existing Account?	Existing Account?	<input type="checkbox"/>
Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Estimated Budget	Budget Amount	<input type="checkbox"/>
Purchase Process	Purchase Process	<input type="checkbox"/>
Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
Capture Summary	Description	<input type="checkbox"/>

+ Insert stage ↻ Add branch

Stage Name*
Develop

Entity*
Opportunity

Relationship
Select relationships

Stage Category
Develop

Step Name	Value	Required
Customer Need	Customer Need	<input type="checkbox"/>
Proposed Solution	Proposed Solution	<input type="checkbox"/>
Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
Identify Competitors	Identify Competitors	<input type="checkbox"/>

+ Insert stage ↻ Add branch

In our example, we want to add an Incubate stage that appears only when the purchase timeframe for a lead is this year or unknown.

Let's add a branch for this after the **Qualify** stage.


Choose **Add branch**.




set the conditions for the branch

Now you set the conditions for when you want the branch to appear.

- A** In the **Field** dropdown, select **Purchase Timeframe**. The available fields are steps in the preceding stage.
- B** In the **Operator** dropdown, select **Equals**.
- C** In the **Type** dropdown, select **Value**.
- D** In the **Value** list, select **This Year** and **Unknown**.

When you're done setting the conditions for the stage, select .

If you want to add another condition, select the **Add** button .

BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details ▾

Stage Name *	Step Name	Value	Required
Qualify	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Entity *	Estimated Budget	Budget Amount	<input type="checkbox"/>
Lead	Purchase Process	Purchase Process	<input type="checkbox"/>
Stage Category	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
Qualify	Capture Summary	Description	<input type="checkbox"/>

+ Insert stage after branch ↻ Add branch

Field	A	Operator	B	Type	C	Value	D
If	Purchase Timeframe	Equals	Value			<input type="checkbox"/> Immediate <input type="checkbox"/> This Quarter <input type="checkbox"/> Next Quarter <input checked="" type="checkbox"/> This Year <input checked="" type="checkbox"/> Unknown	<input type="checkbox"/>

+ Insert stage

+ Insert stage



add a stage in the branch

BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details ▾

Stage Name*	Step Name	Value	Required
Qualify			
Entity*	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Lead	Estimated Budget	Budget Amount	<input type="checkbox"/>
Stage Category	Purchase Process	Purchase Process	<input type="checkbox"/>
Qualify	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
	Capture Summary	Description	<input type="checkbox"/>

+ Insert stage after branch Add branch

If Purchase Timeframe equals "This Year, Unknown"



+ Insert stage

Stage Name*	Step Name	Value	Required
Develop			
Entity*	Customer Need	Customer Need	<input type="checkbox"/>
Opportunity	Proposed Solution	Proposed Solution	<input type="checkbox"/>

Choose **Insert stage**.



edit the new stage

BUSINESS PROCESS FLOW Lead to Opportunity Sales Process

Details ▾

Stage Name * Qualify	Step Name	Value	Required
Entity * Lead	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Stage Category Qualify	Estimated Budget	Budget Amount	<input type="checkbox"/>
	Purchase Process	Purchase Process	<input type="checkbox"/>
	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
	Capture Summary	Description	<input type="checkbox"/>

+ Insert stage after branch ↻ Add branch

If Purchase Timeframe equals "This Year, Unknown"



+ Insert stage

Stage Name * Incubate	Step Name	Value	Required
Entity * Lead	Gather needs	Need	<input type="checkbox"/>
Relationship Select relationships	Update lead summary	Description	<input type="checkbox"/>
Stage Category Qualify	Update budget	Budget Amount	<input type="checkbox"/>

Use the same steps as before to edit the new stage.



add a stage after the branch

BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details ▾

Stage Name *			
Qualify			
Entity *			
Lead			
Stage Category			
Qualify			
	Step Name	Value	Required
	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
	Estimated Budget	Budget Amount	<input type="checkbox"/>
	Purchase Process	Purchase Process	<input type="checkbox"/>
	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
	Capture Summary	Description	<input type="checkbox"/>

+ Insert stage after branch Add branch

If Purchase Timeframe equals "This Year, Unknown"

+ Insert stage

Stage Name *			
Incubate			
Entity *			
Lead			
Relationship			
Select relationships			
Stage Category			
Qualify			
	Step Name	Value	Required
	Gather needs	Need	<input type="checkbox"/>
	Update lead summary	Description	<input type="checkbox"/>
	Update budget	Budget Amount	<input type="checkbox"/>

Now that you've created a branch, you need to add a stage for the two branches to merge back into to continue with the process.

In our example, we'll add a stage called **Research** that both the **Qualify** and **Incubate** stages merge into.

Choose **Insert stage after branch**.



edit the new stage

If Purchase Timeframe equals "This Year, Unknown"



+ Insert stage

Stage Name*	Step Name	Value	Required
Incubate	Gather needs	Need	<input type="checkbox"/>
Entity*	Update lead summary	Description	<input type="checkbox"/>
Lead	Update budget	Budget Amount	<input type="checkbox"/>
Relationship			
Select relationships			
Stage Category			
Qualify			

+ Insert stage Add branch

Use the same steps as before to edit the new stage. Name this stage **Research**, base it off the **Opportunity** entity, categorize it as **Research**, and add steps to it.

Stage Name*	Step Name	Value	Required
Research	New Step	--	<input type="checkbox"/>
Entity*			
Opportunity			
Relationship			
Select relationships			
Stage Category			
--			

+ Insert stage Add branch



define how the stages are related

If Purchase Timeframe equals "This Year, Unknown"



+ Insert stage

Stage Name*	Step Name	Value	Required
Incubate	Gather needs	Need	<input type="checkbox"/>
Entity*	Update lead summary	Description	<input type="checkbox"/>
Lead	Update budget	Budget Amount	<input type="checkbox"/>
Relationship			
Select relationships			
Stage Category			
Qualify			

+ Insert stage ↶ Add branch

Stage Name*	Step Name	Value	Required
Research	New Step	--	<input type="checkbox"/>
Entity*			
Opportunity			
Relationship			
Select relationships			
Stage Category			
--			

+ Insert stage ↶ Add branch

Because the **Research** stage is based on **Opportunity** while the **Qualify** and **Incubate** stages are based on **Lead**, you need to define how these stages are related.

Choose **Select Relationships**.



set the relationships

Select Relationships

Select relationships to use that originate from the parent entity

Previous Stage	Entity	Relationship
Qualify	Lead	Originating Lead
Incubate	Lead	None

None

Originating Lead

OK Cancel

Select the previous stage.

Select the entity the previous stage is based on.

Select the relationship to this stage.

Choose **OK** when you're done.



need to delete a stage or a step?

Stage Name *	Step Name	Value	Required
Develop	Customer Need	Customer Need	<input type="checkbox"/>
	Proposed Solution	Proposed Solution	<input type="checkbox"/>
	Identify Stakeholders	Identify Customer Contacts	<input type="checkbox"/>
	Identify Competitors	Identify Competitors	<input type="checkbox"/>
	hh	Account	<input type="checkbox"/>




Select the stage or step you need to remove, and then choose **X**.

+ Insert stage ↶ Add branch




need to delete a condition?

If Purchase Timeframe equals "This Year, Unknown" 

+ Insert stage

Step Name	Value	Required
Gather needs	Need	<input type="checkbox"/>
Update lead summary	Description	<input type="checkbox"/>
Update budget	Budget Amount	<input type="checkbox"/>


+ Insert stage  Add branch

Stage Name *
Incubate

Entity *
Lead

Relationship
Select relationships

Stage Category
Qualify

Hover over the condition you want to delete and choose the **Delete** button .

If you have more than one expression in your branch, deleting all of them deletes the entire branch.



make your business process available for use

You're almost done! All you need to do now is save your business process and make it available for new CRM records created by your sales or service reps.



save your work

File | Save | Save As | Activate | Order Process Flow | Enable Security Roles | Show Dependencies | Actions

BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details

Stage Name *	Step Name	Value	Required
Qualify			
Entity *	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Lead	Estimated Budget	Budget Amount	<input type="checkbox"/>
Stage Category	Purchase Process	Purchase Process	<input type="checkbox"/>
Qualify	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
	Capture Summary	Description	<input type="checkbox"/>

+ Insert stage after branch Add branch

When you have the stages and steps the way you want them, choose **Save**.



set which records use your process

The screenshot shows the Dynamics 365 interface for configuring a business process flow. The command bar at the top includes options like 'File', 'Save', 'Save As', 'Activate', 'Order Process Flow', 'Enable Security Roles', 'Show Dependencies', and 'Actions'. Below the command bar, the 'BUSINESS PROCESS FLOW' section is titled 'Lead to Opportunity Sales Process'. A table below shows the configuration for the 'Qualify' stage.

Step Name	Value	Required
Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Estimated Budget	Budget Amount	<input type="checkbox"/>
Purchase Process	Purchase Process	<input type="checkbox"/>
Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
Capture Summary	Description	<input type="checkbox"/>

Below the table, there are two icons: '+ Insert stage after branch' and '+ Add branch'.

If there's more than one business process for a record type, you'll need to set which process is automatically assigned to new records.

On the command bar, choose **Order Process Flow**.

The screenshot shows a dialog box titled 'Process Flow Order: Lead'. The dialog contains a list of business process flows. The 'Lead to Opportunity Sales Process' is selected and highlighted in blue. The dialog also includes 'OK' and 'Cancel' buttons at the bottom.

In our example, there's only one business process for leads, so it will be assigned to new leads automatically. No action needed.

Note: If there is more than one, and you want it assigned to new records automatically, you need to move the process to the top of the list.



activate the business process

File | Save | Save As | **Activate** | Order Process Flow | Enable Security Roles | Show Dependencies | Actions

BUSINESS PROCESS FLOW
Lead to Opportunity Sales Process
Details

Stage Name *	Step Name	Value	Required
Qualify			
Entity *	Purchase Timeframe	Purchase Timeframe	<input type="checkbox"/>
Lead	Estimated Budget	Budget Amount	<input type="checkbox"/>
Stage Category	Purchase Process	Purchase Process	<input type="checkbox"/>
Qualify	Identify Decision Maker	Decision Maker?	<input type="checkbox"/>
	Capture Summary	Description	<input type="checkbox"/>

+ Insert stage after branch Add branch

You need to activate a business process before people can use it.

On the command bar, choose **Activate**.

Now when you create a new lead, this process will be assigned to it automatically, and the stages and steps will be ready to follow as you work with customers.



now try it yourself

Now that you've gone through an example, you're ready to adapt your own business process to meet the needs of your organization.

To help you get going quickly, there are a couple of great sources for business processes that you can start with:

- Several ready-to-use processes for common business scenarios are available. To adapt one of these, first you'll need to [add them to the system](#) (similar to the way you add sample data).
- Or, you can start from a [business process solution that you download from Microsoft PinPoint](#). You'll find a library of free templates by industry.



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Version 7.1.1





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