Microsoft Dynamics CRM v2013: Process Master Class Agenda

Business Process Flows Microsoft CRM 2013

- What are Business Process Flows & why would you use them?
- Accessing Business Process Flows
- Default Business Processes in Microsoft Dynamics CRM 2013
    - o Sidebar: Additional Downloadable Processes
- Create a New or Copy an Existing Business Process Flow
    - o Process Stages
        - ▪ Adding New Stages
    - o Process Steps
        - ▪ Adding New Steps, Stage-gating
    - o Spanning Entities with a Business Process Flow
    - o Closing the Loop
    - o Enabling Security Roles for Business Processes
    - o Changing The Business Process Flow Order
    - o Activating/De-Activating Business Process Flows
- Switching Processes
- Gotchas!

Workflows Microsoft CRM 2013

- What are Workflows & why would you use them?
- Accessing Workflows
- Creating a New Workflow
    - o Sidebar: Creating & Using a Process Template
- Synchronous or Asynchronous?
    - o Setting the Scope of the Workflow
    - o Trigger Events, On-Demand, Child Workflows
    - o Adding Stages?
    - o Adding Steps – Conditions & Waits
        - ▪ Conditional Branching & Parallel Waits
    - o Adding Actions – Create/Update/Assign/Send Email/Child Workflow/Status/Stop
- Activating/De-Activating Workflows

Business Rules Microsoft CRM 2013

- What are Business Rules & why would you use them?
- Accessing Business Rules
- Creating a New Business Rule
  - o Setting the Scope for the Rule
  - o Configuring a Condition
  - o Configuring an Action
  - o Testing the Business Rule
- Activating/De-Activating Business Rules
- Gotchas!