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Business Processes in Dynamics CRM 2013

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Business Processes Value Proposition - WHY

- Shorter sales cycle
- Gain customer trust through standardized customer interactions
- Improved collaborative/team selling
- Better measurement of progression through sales stages
- Improved forecasting and risk management
- Better success against competitor
- Shorter ramp up time for new hires
- Increase in revenue and profit margins
Business Processes in CRM (Orion) - WHAT

- Used to automate repetitive tasks, implement repeatable processes
- Workflows, Dialogs, Actions, Business Process Flows
- Created in or called from Business Process Designer
- Intended for use by business users
- Solution Components
New in CRM 2013 (Orion)

- **Easy client-side, rule writing capability (across browsers and mobile devices) for business analysts**

- **Server-side workflows that run as part of user action and provide real-time feedback to end users**

- **Allow transactional custom API calls such as: “Escalate Case” or “Send Pothole Report”**
Business Process Flow – Feature Overview

- Multiple processes per Entity including Custom Entity
- End users should be able to switch a sales process
- Assigning Sales Processes to Roles
- Stage categories that link stages across business processes
- Making business process portable (solution aware)
- Business processes that span entities
- State Gating for Business processes
- Business Processes on Mobile Client Application
**Business Process Flow - Demo**

**Process Setup**
- Configure multiple processes per entity
- One process per record per user
- Enable Stage Gating
- Role based processes

**Business Insight**
- Track progress in processes
- Build dashboard based on stages

**Business Process mapping**
- Map business processes to BPF without entity constraints
- Create records within process
- Different processes for same entity based on sales product

**Deployment**
- Deploy BPF to different environments

**Entities in CRM**
- Define processes for almost all entities in CRM
Portable Business Logic - Demo

### Portable Logic
- PBL rules will run on web, Outlook and mobile clients

### Scalable
- Defined at specific form or across all forms

### Ease of interface
- Easy to use Visual tool for logic specification
- Form preview will run rules

### Solution Aware
- Add to solution and deploy to different platforms

### Localizable Messages
- Messages are localizable
Real-time workflows - Demo

Transaction Aware
- All steps run within a single transaction
- Supports both pre and post pipeline stages

Secure by design
- Security context - calling user or workflow owner
- New security privilege for workflow activation

Fits your existing solution
- Existing workflows can be converted to real-time
- Packaged custom workflow activities
Custom Actions – Demo?

Define Custom API Messages
- Optionally bind to specific entity types
- Define input and output parameters

Implement logic with workflow
- Familiar declarative designer
- Extend with custom workflow activities

Execute from your code
- Invoke from SDK clients
- Invoke from web resources
Questions