Multi-Stage Process Configuration

Data Driven Automation for Case Management in Dynamics 365 CRM

Date: 10th July 2024

Document Version History

#	Date	Author	Reason	Version
1	10/7/2024	Beans Infotech	Initial Version	0.1

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1. Introduction

Microsoft Dynamics 365's Multi-Stage Process Configuration is a strong tool for building, customizing, and extending business applications. By understanding each stage (layer), organizations can tailor Dynamics 365 to their specific needs and integrate it smoothly into their IT systems. This configuration for case management helps streamline support processes by defining case stages and statuses. Its loosely coupled design allows it to be easily connected to any entity within the system.

The Multi-Stage Process Configuration solution in Microsoft Dynamics 365 CRM offers a flexible and scalable way to manage case stages and statuses. This adaptability lets businesses customize workflows to their needs, improving efficiency, transparency, and control. Whether for case management, approval processes, or other workflows, this solution helps organizations streamline operations and achieve better results.

Key Features

The Multi-Stage Process Configuration for Dynamics 365 Workflow Automation solution offers several key features:

- Automated and Customizable Processes: Users can tailor and automate processes to fit specific types and customer needs, enhancing response times and process efficiency.
- Efficient Tracking: Robust tracking mechanisms enable users to monitor and complete tasks promptly.
- Flexible Assignment: Allows for the flexible assignment of process data to appropriate teams or individuals based on predefined rules.
- SLA Management: Ensures compliance with Service Level Agreements by providing tools to set and monitor SLA targets at various stages of the resolution process.
- Data Management and Reporting: Comprehensive data capture capabilities and detailed reporting tools support better decision-making and continuous improvement.
- Enhanced Communication: Communication templates ensure consistent and effective customer interactions, addressing evolving customer preferences and expectations.

- Usability/Versatility: The solution's flexibility allows it to automate any process flow, such as case management, lead automation, or custom modules like application processes.

Organizational Benefits

The Multi-Stage Process Configuration for Dynamics 365 Workflow Automation solution offers several organizational benefits:

- Increased Operational Efficiency: Automating and customizing processes reduce manual efforts, streamlining overall operations.
- Higher Customer Satisfaction: Faster resolution of incidents and effective communication tools enhance customer satisfaction levels.
- Decreased Dependency on IT: Users can configure and adjust processes on their own, reducing reliance on IT support.
- Improved Compliance and Service Quality: Adherence to SLAs and effective tracking mechanisms maintain high service standards.
- Enhanced Decision-Making: Advanced data reporting helps in analyzing trends and making informed decisions.
- Great Adaptability: The solution's flexibility allows it to adapt to evolving customer needs and market conditions.

Example

Below are the examples:

Example	Entity	Stages	Statuses	Stage Details
Case Management	Customer Case	Intake	New	**Intake Stage**: New (Case created and details logged)
		Investigation	In Progress, On Hold	**Investigation Stage**: In Progress/On Hold (Case under investigation)
		Resolution	Resolved	**Resolution Stage**: Resolved (Case solution identified and implemented)
		Closure	Closed	**Closure Stage**: Closed (Case reviewed and officially closed)
Request Management	Service Request	Initiation	New	**Initiation Stage**: New (Request initiated by user)
		Review	Under Review	**Review Stage**: Under Review (Request being reviewed by the responsible team)
		Approval	Approved	**Approval Stage**: Approved (Request approved by the relevant authority)
		Fulfilment	Completed	**Fulfilment Stage**: Completed (Request fulfilled and closed)

Example	Entity	Stages	Statuses	Stage Details
Leave Management	Leave Request	Submission	Pending	**Submission Stage**: Pending (Leave request submitted by employee)
		Approval	Approved, Rejected	**Approval Stage**: Approved/Rejected (Manager reviews and approves or rejects)
		Processing	Processed	**Processing Stage**: Processed (HR processes the approved leave request)
		Completion	Completed	**Completion Stage**: Completed (Leave request is fully processed and completed)

2. Purpose

The purpose of the Multi-Stage Process Configuration solution is to empower Dynamics 365 CRM users with a robust and flexible framework for managing complex workflows. By providing a seamless method for defining and tracking case stages and statuses, the solution enables users to tailor workflows to specific business needs, enhance efficiency, and improve process transparency. This loosely coupled architecture allows integration with any entity within Dynamics 365, promoting adaptability and scalability.

This solution helps Dynamics 365 CRM users streamline their operations by customizing workflows, improving task management, and ensuring better control over business processes. It enhances system performance and flexibility, making it an essential tool for various business applications such as approval management, request management, service management, leave management and other processes.

3. How to Use?

To use the Multi-Stage Process Configuration solution in Microsoft Dynamics 365, follow these two steps:

1. Create or Use Existing Entity: Create the following entities for implementing the 'Multi-Stage Process Configuration':
    - Case Process (if required)
    - Case SR
    - Case Sub SR (if required)
    - Case Stage
    - Case Stage Status

    These entities will contain the details, case stage, and case stage status information required for the multi-stage process.

2. Update Entity Details in Configuration:

    To use the Multi-Stage Process Configuration solution, update the entity details in the configuration.

    For detailed instructions on configuring the solution, refer to section 4, which covers:

    - Entity Configuration
    - Main Configuration
    - Configuration Steps

    By following the guidance in section 4, you can properly set up the entity details and configure the multi-stage process functionality to align with your specific requirements in Dynamics 365.

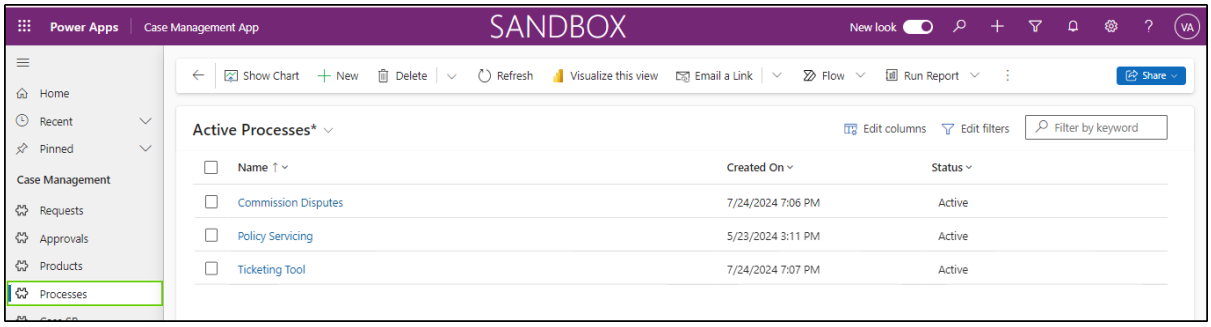
Once you have completed these two steps, you can apply the Multi-Stage Process Configuration solution to any entity within your system.

In this section, we will cover the step-1 where you have to create or use existing entity where you want to use/apply the ‘Multi-Stage Process Configuration’ solution.

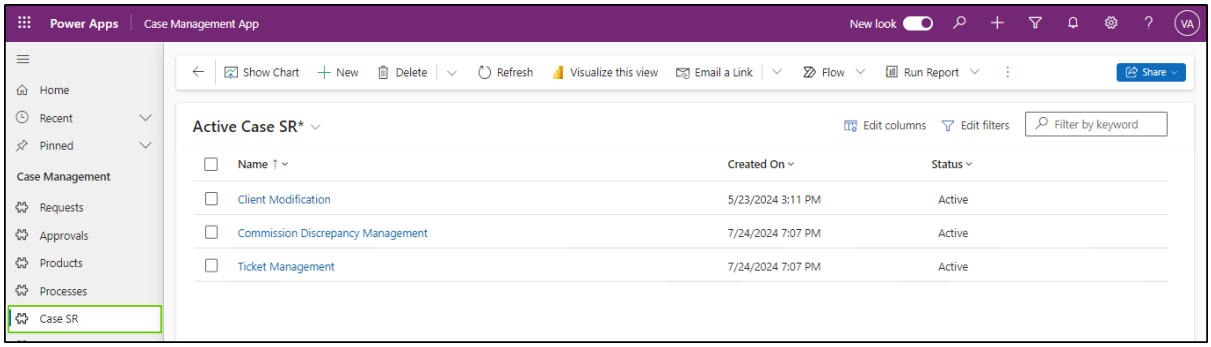
Additionally, you have to create below entities:

1. Case Process (if required)
2. Case SR
3. Case Sub SR (if required)
4. Case Stage
5. Case Stage Status

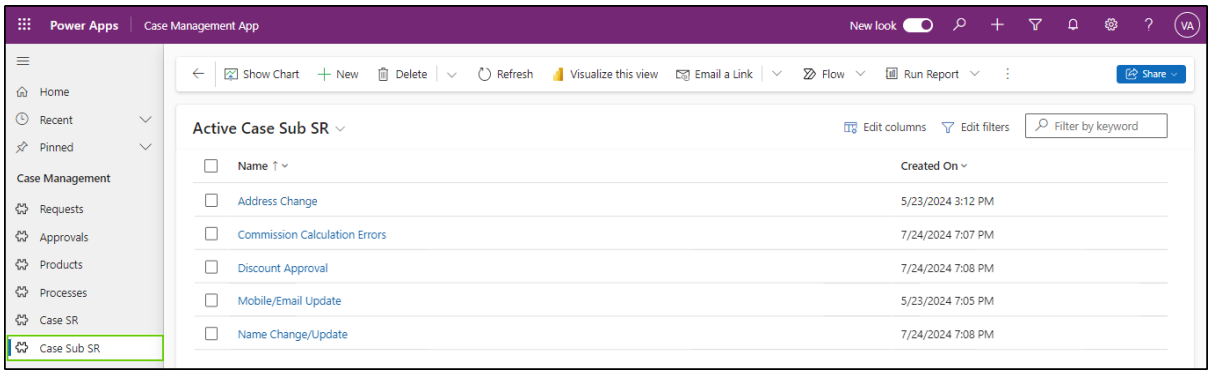
Case Process: In this entity you can add the process types. Example: Commission Disputes, Policy Servicing, etc.



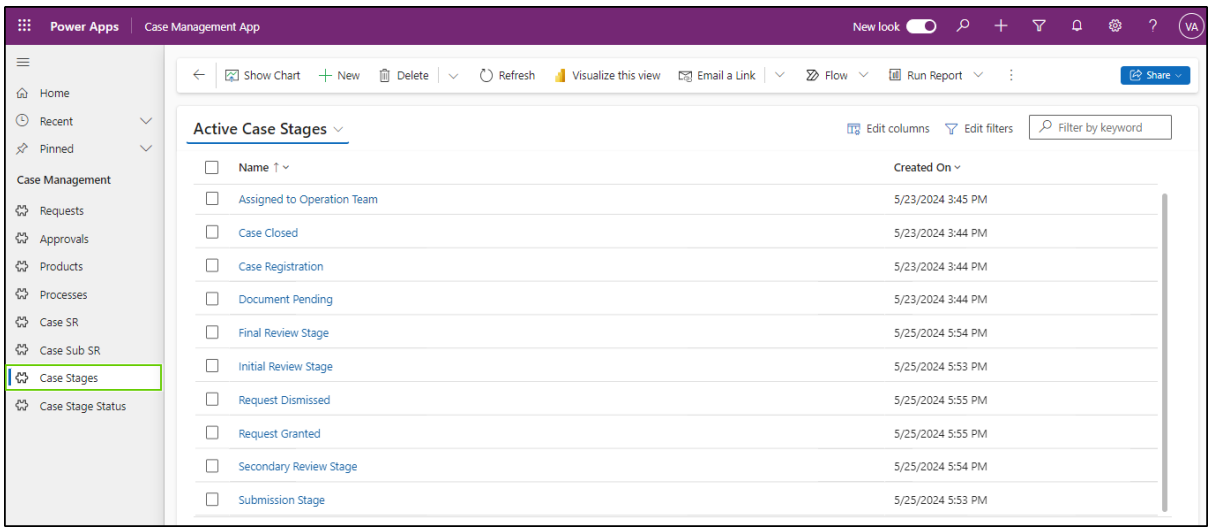
Case SR: In this entity you can add the SR types. Example: Client Modification, Commission Discrepancy Management, etc.



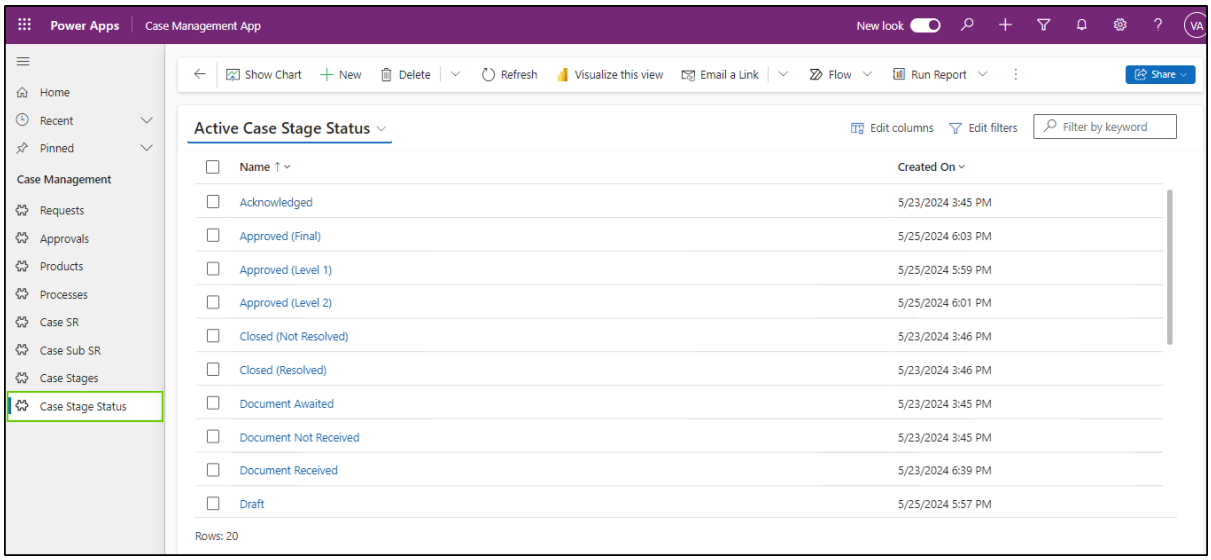
Case Sub SR: In this entity you can add the SR types. Example: Discount Approval, Address Change, Commission Calculation Errors, Mobile/Phone Update, etc.



Case Stage: In this entity you can add the case stages. Example: Case Registration, Case Acknowledged, Document Awaited, Awaiting Approval, Case Resolved, etc.



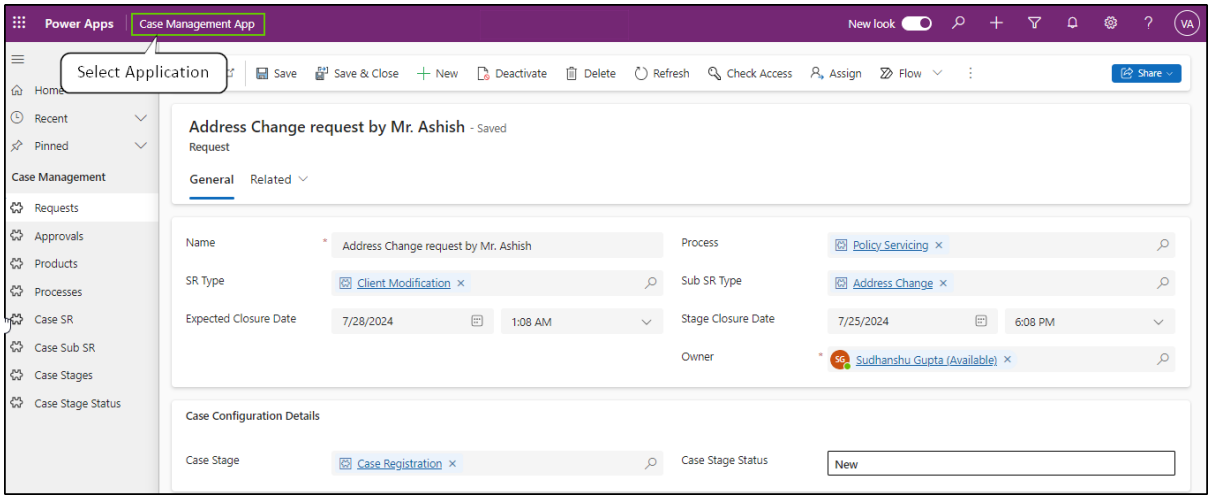
Case Stage Status: In this entity you can add the case stages status. Example: New, Assigned to User, Draft, Under Review, Approved, Rejected, Closed, etc.



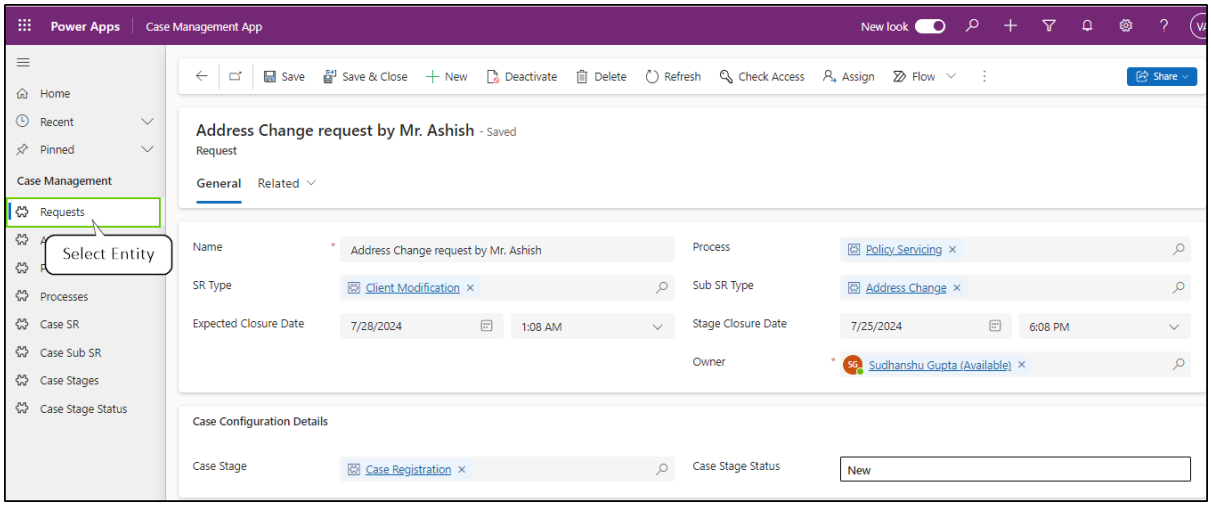
End to End Process:

Here is the complete end-to-end process for managing address change requests within the 'Request Management' system.

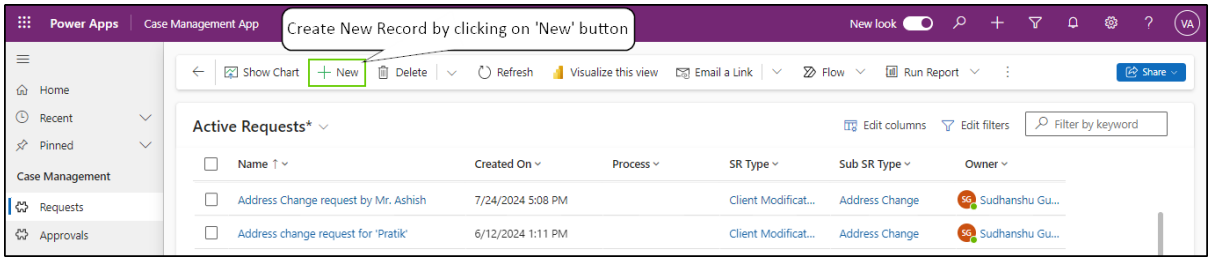
1. Select Application: Choose the application you want to work with.



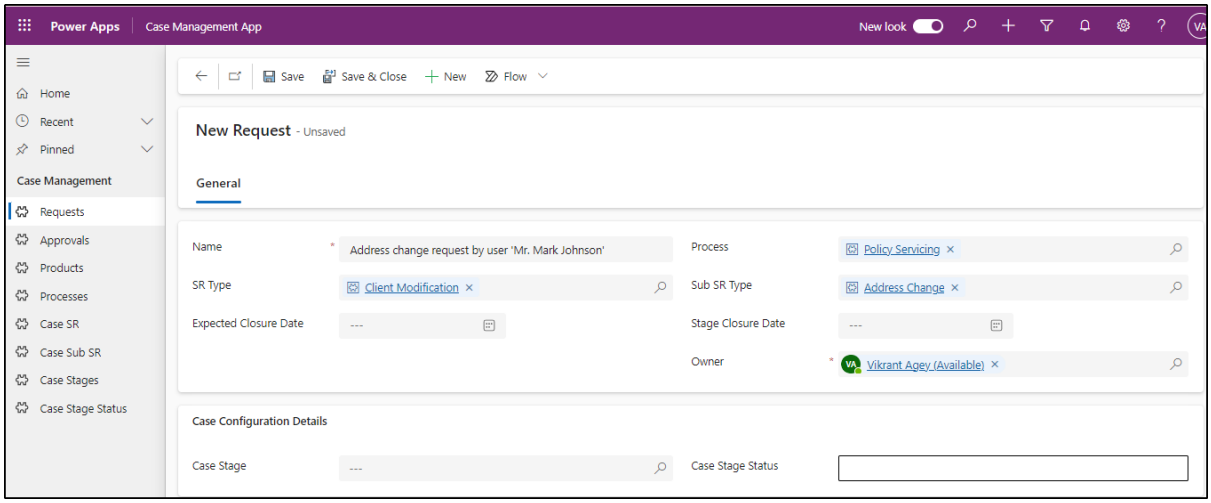
2. Select Entity: Currently, the entity is set as 'Request'.



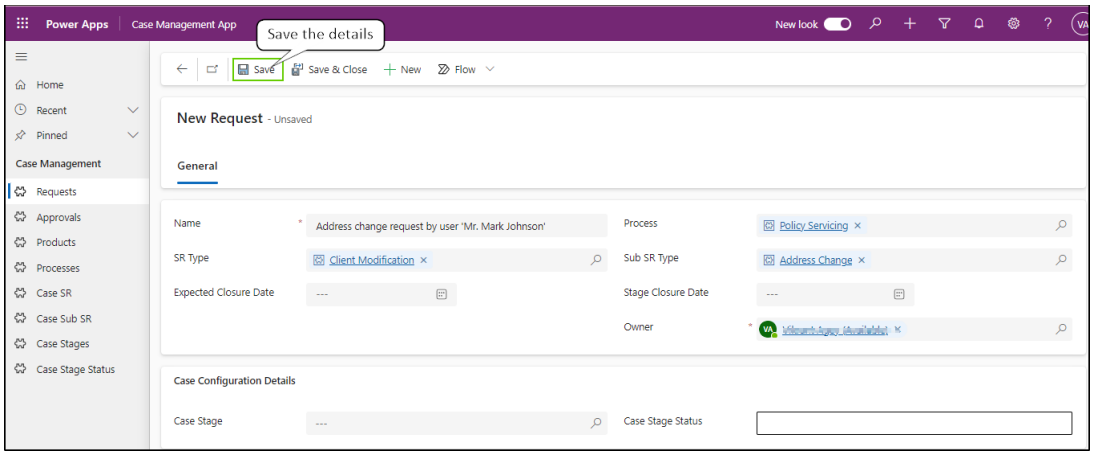
3. Create New Record: Click the 'New' button to create a new request.

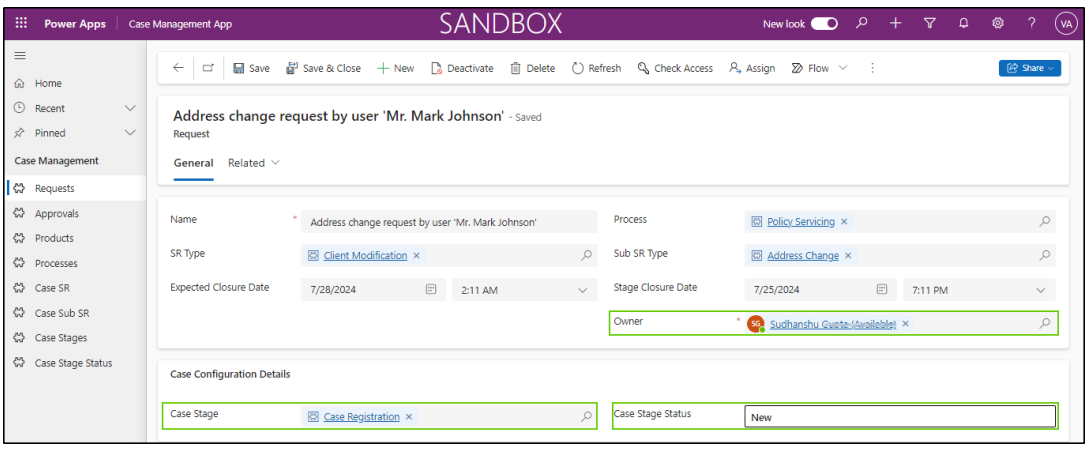


4. Enter Details: Fill in details like the name & Select fields such as Process, SR Type, Sub SR Type, and other relevant information.

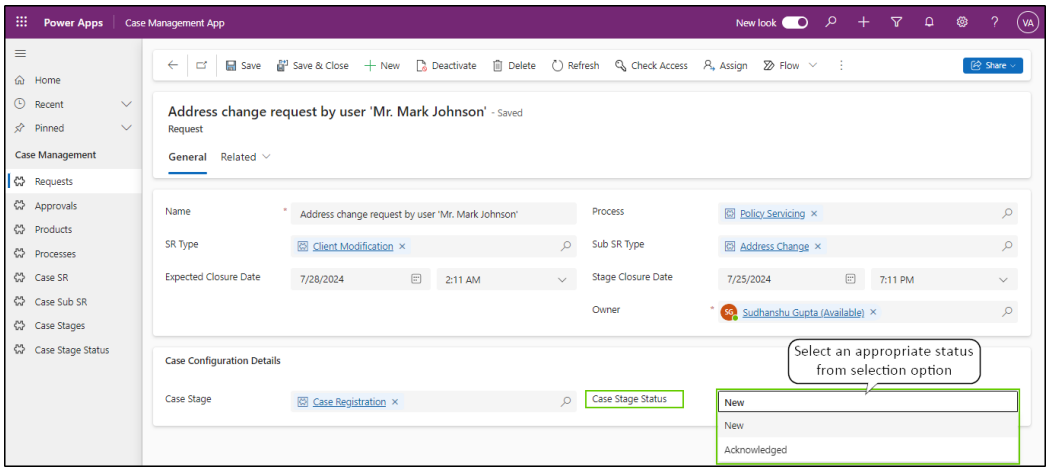


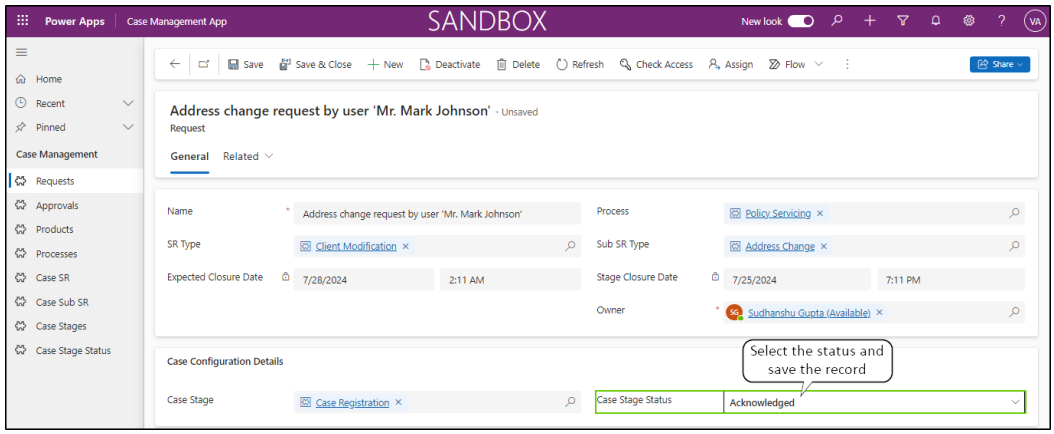
5. Save the Request Record: Click the save button. The system will update the 'case stage' and 'case stage status' along with the responsible owner based on the configuration. It will also update the expected closure date and time for the 'Case' and 'Stage'. A screenshot will show the details about the case stage, case stage status, and responsible owner.



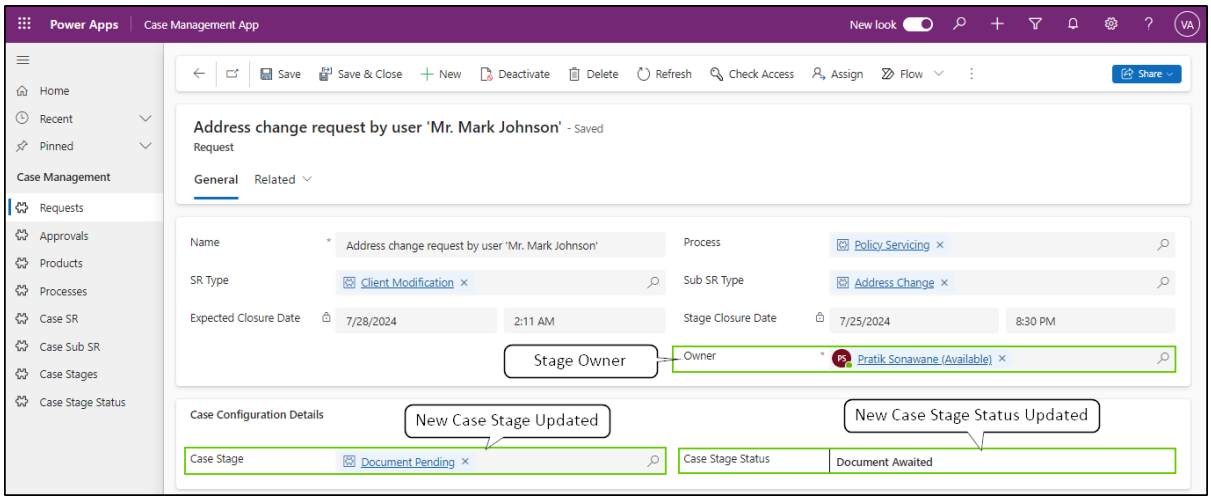


6. Update Case Stage Status: The owner can update the 'Case Stage Status'. After saving the request record, the system will automatically update the 'case stage' and 'case stage status'.

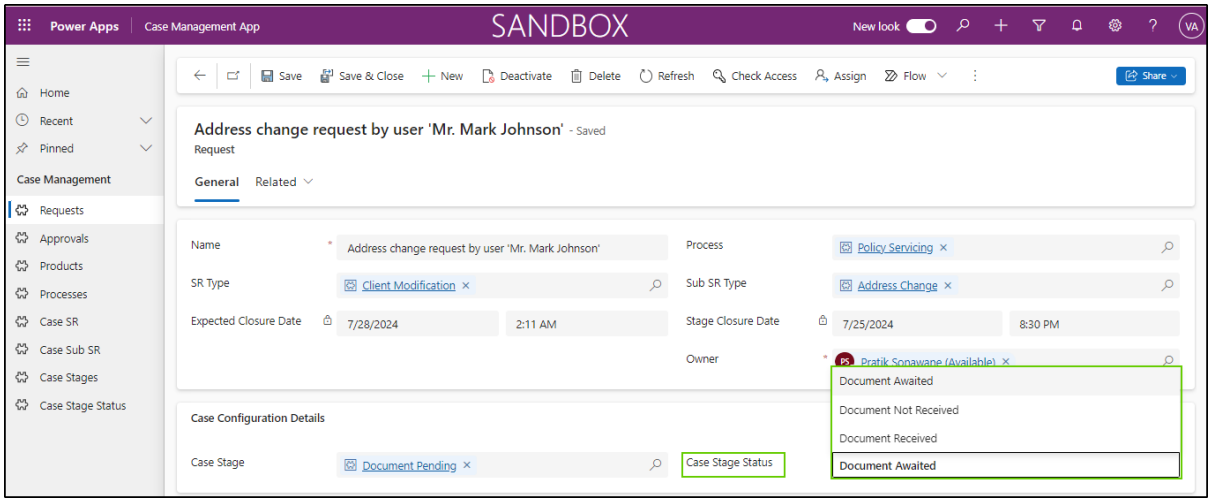


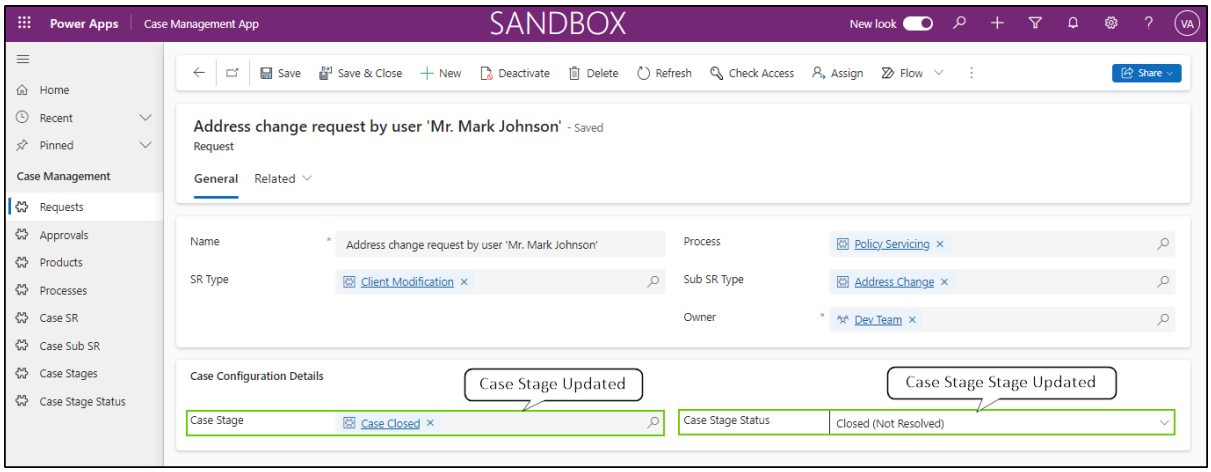


7. Move to Next Case Stage: The owner can select the new 'case stage status', and the system will update the next 'case stage' and 'case stage status'.



8. Continue Moving Stages: The owner can keep moving the 'Case Stage' and 'Case Stage Status' as needed.



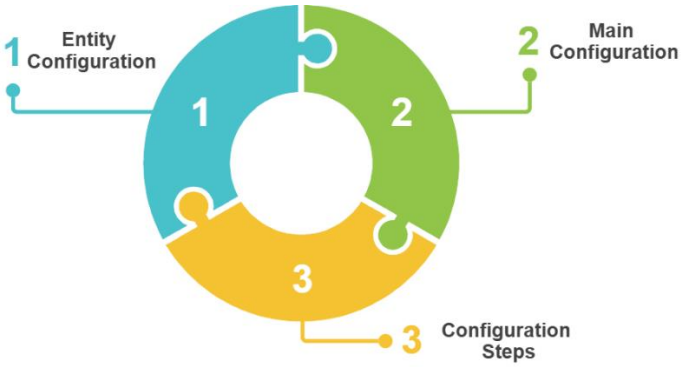


This simplified process outlines the steps involved in managing requests within the system.

4. Configuration

To use this solution, you must configure the below three configuration steps:

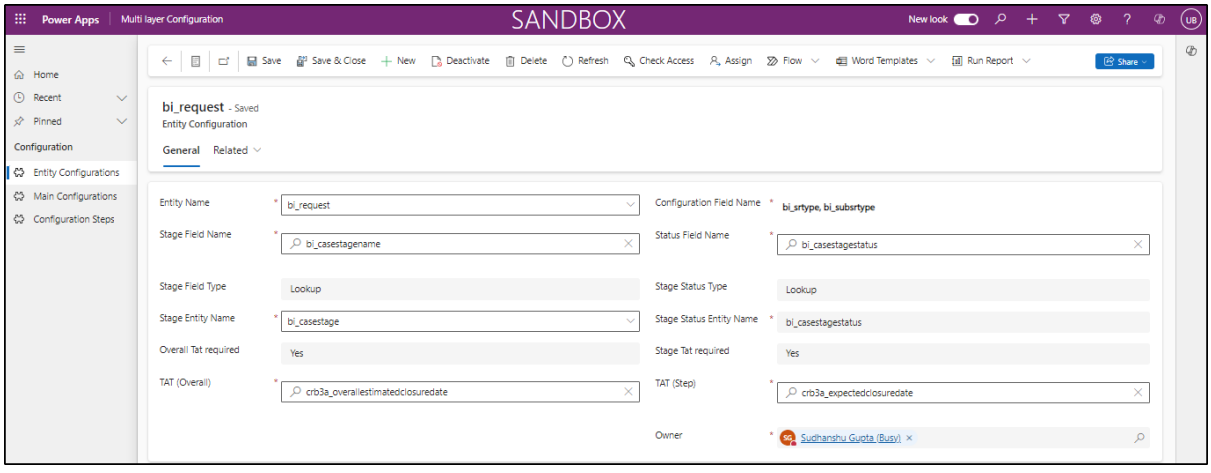
1. Entity Configuration
2. Main Configuration
3. Configuration Steps



4.1 Entity Configuration

Entity configuration is a component in the Multi-Stage Process Configuration solution for Microsoft Dynamics 365. It involves setting up the details of the entity from the application for which you want to implement the multi-stage process functionality. This setup includes specifying schema details, fields, and additional functionalities such as Turnaround Time (TAT) and stage/status tracking.

Entity Configurations Details:



4.1.1 Entity configuration

Below are the fields and their description for entity configuration:

Sr No.	Field Name	Field Description
1	Entity Name	Select the name of the entity (table) for which you want to apply the multi-process configuration solution.
2	Configuration Field Name	Select one or more fields from the selected entity that you want to configure with the Multi-Stage Process Configuration.
3	Stage Field Name	Select the name of the field that represents the stage of the process.
4	Status Field Name	Select the name of the field that represents the status of the process.
5	Stage Field Type	Select the type of the stage field, either Lookup or Picklist.
6	Stage Entity Name	If the stage field type is Lookup, select the name of the entity (table) that contains the stage information.
7	Stage Status Type	Select the type of the stage status field, either Lookup or Picklist.
8	Stage Status Entity Name	If the stage status field type is Lookup, select the name of the entity (table) that contains the stage status information.
9	Overall TAT required	Select whether you need to track the overall turnaround time (TAT) for the process.
10	TAT (Overall)	If the overall TAT is required, enter the name of the field that will store the overall TAT.
11	Stage TAT required	Select whether you need to track the TAT for each stage of the process.
12	TAT (Step)	If the stage TAT is required, enter the name of the field that will store the TAT for each stage.
13	Owner	This field shows the name of the user who created the entity configuration record.

Detailed Steps for Entity Configuration:

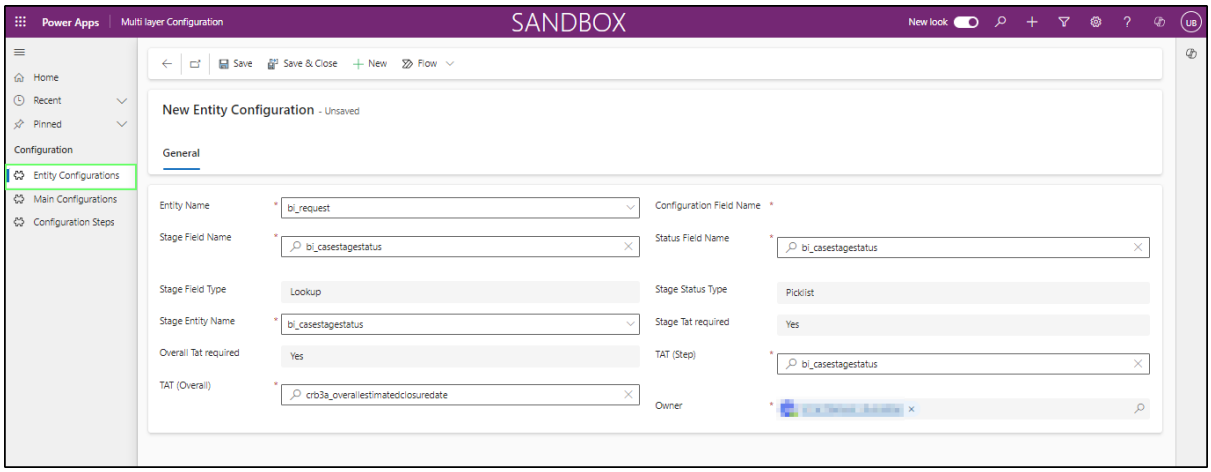
1. Selecting the Entity:
    - Entity Selection: Choose the entity within Dynamics 365 for which you want to apply the Multi-Stage Process Configuration. This could be any

standard or custom entity, such as Cases, Opportunities, Requests, or any other entity relevant to your business process.

2. Schema Details:
    - Schema Name: Select the schema name of the chosen entity. The schema name uniquely identifies the entity within Dynamics 365.
    - Fields Selection: Choose the specific fields within the entity that will be used in the Multi-Stage Process Configuration. These fields typically include key attributes such as Status, Owner, Priority, and any other custom fields relevant to your workflow.
3. TAT Functionality:
    - Enable TAT: Enable Turnaround Time (TAT) functionality for the entity. TAT is used to track the time taken to move a case through various stages and statuses.
    - TAT Parameters: Configure the parameters for TAT, such as the start and end points for TAT calculation, time thresholds, and escalation rules if the TAT exceeds predefined limits.
4. Stage and Stage Status Functionality:
    - Enable Stage Tracking: Enable stage tracking for the entity. This involves defining the various stages that a case or process will go through.
    - Stage Definitions: Create and configure the stages. Each stage should have a unique name and an associated description. Examples of stages could include "New", "In Progress", "Pending Review", "Resolved", and "Closed".
    - Status Definitions: Within each stage, define the possible statuses. Statuses represent the finer granularities of a stage. For instance, within the "In Progress" stage, statuses could include "Assigned", "Under Review", and "Pending Approval".

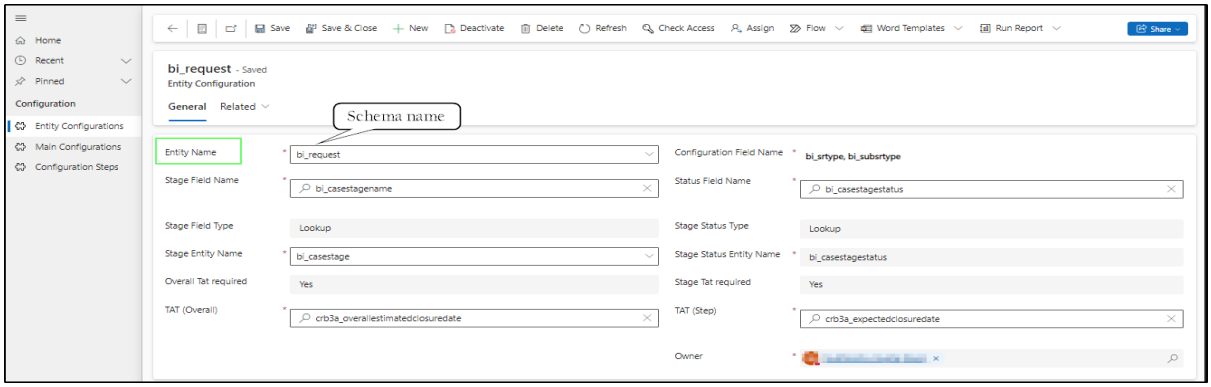
Example: Case Entity Configuration

1. Entity Selection:
    - Entity: Request



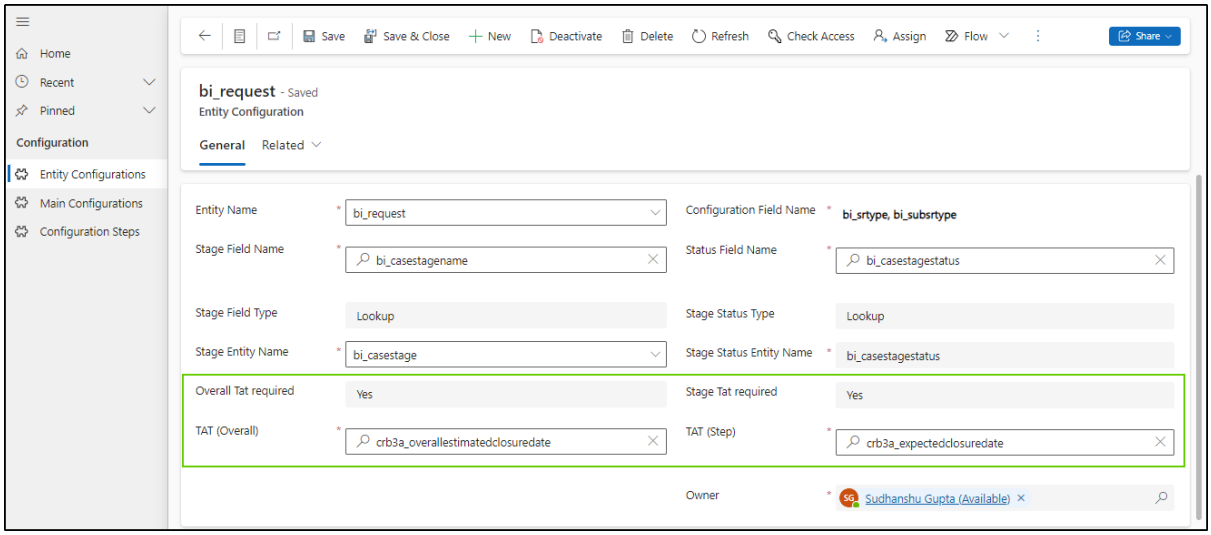
4.1.2 Entity selection

2. Schema Details:
    - Select Schema name of the entity as well as for the fields which we want to use in this configuration.
    - Fields: Stage, Status, TAT, SR Type, Sub-SR Type, etc.



4.1.3 Schema details

3. TAT Functionality:
    - If the TAT (Turnaround Time) functionality is enabled, such as when the "Overall TAT required" option is set to "Yes", then you should select the schema name of the field that exists in the selected entity.
    - Note that the TAT functionality can be applied to the overall process or to individual steps within the process, depending on the specific requirements. You can use the TAT functionality as needed to meet the requirements of your use case.



4.1.4 TAT Functionality

4. Stage and Stage Status Functionality:
    - Enable Stage Tracking: Yes
    - Stage Definitions:
        - New: Status - Open

- In Progress: Statuses - Assigned, Under Review, Pending Approval
- Pending: Statuses - Waiting for Customer, Waiting for Parts
- Resolved: Status - Fixed, Closed, Rejected

- Status Definitions:
  - New: Open
  - In Progress: Assigned, Under Review, Pending Approval
  - Pending: Waiting for Customer, Waiting for Parts
  - Resolved: Fixed, Closed, Rejected

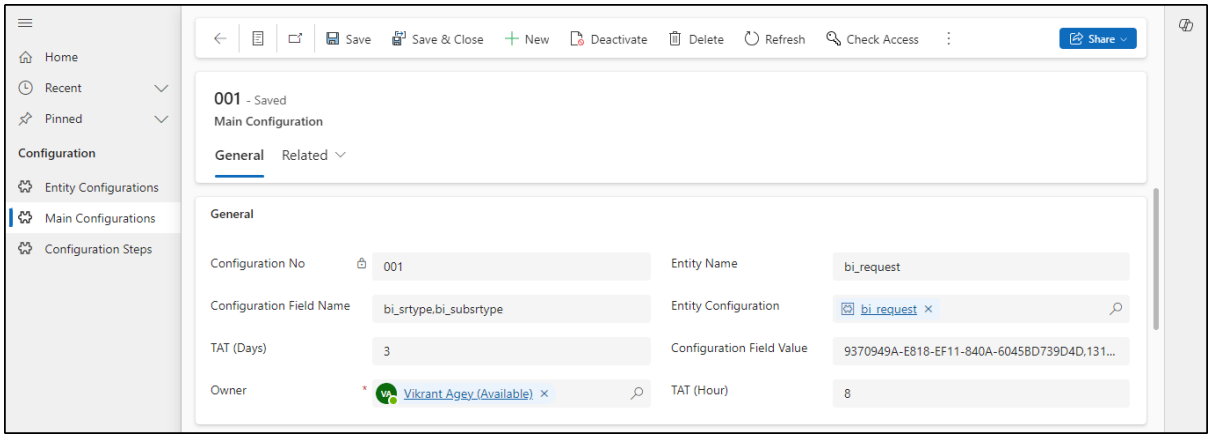
The entity configuration in Multi-Stage Process Configuration for Microsoft Dynamics 365 CRM provides a detailed and structured approach to managing workflows through stages and statuses. By defining schema details, enabling TAT functionality, and configuring stages and statuses, organizations can create customized, efficient, and transparent workflows that align with their business processes.

4.2 Main Configuration

The main configuration is an important aspect of the multi-stage process configuration solution in Microsoft Dynamics 365. It encompasses the primary settings and parameters that govern how the multi-layer functionality operates for a specific entity within the application.

The main configuration in the multi-layer configuration solution for Microsoft Dynamics 365 is a vital setup that defines how the multi-layer stages and statuses will function for a specific entity. By carefully configuring the entity, TAT functionality, and utilizing the auto-generated configuration number, organizations can achieve streamlined, efficient, and well-monitored workflows.

Main Configuration Details:

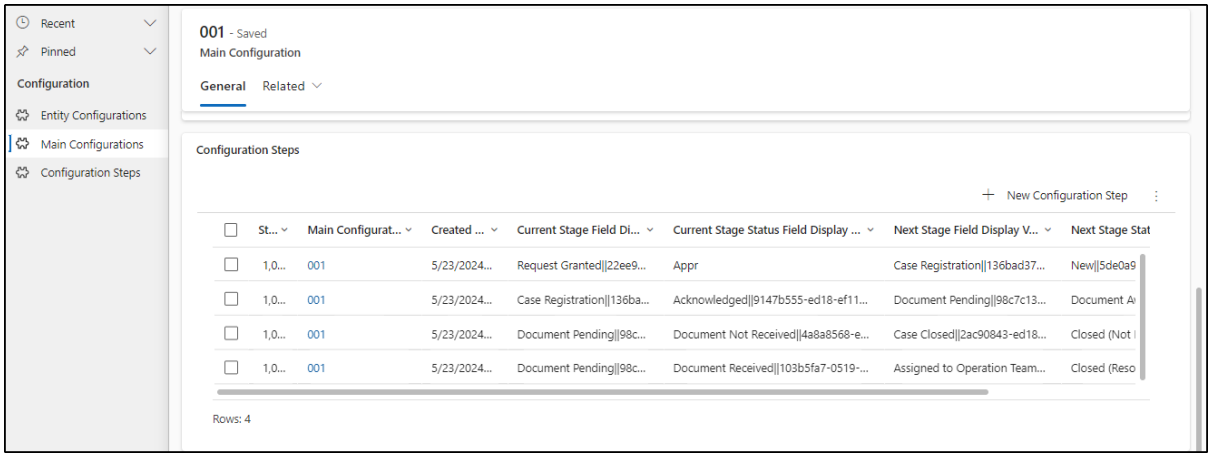


4.2.1 Main configuration

Below are the fields and their description for main configuration:

Sr. No.	Field Name	Field Description
1	Configuration No	This is an auto-generated number field which is unique and will be used in configuration steps as a lookup field.
2	Entity Name	Enter the schema name for an entity.
3	Entity Configuration	Select the entity configuration or create a new entity configuration.
4	Configuration Field Name	Multi-selection fields which will allow you to select the schema name of multiple fields that exist in the selected entity.
5	TAT (Days)	Enter the value in days for TAT functionality.
6	TAT (Hour)	Enter the value in hours for TAT functionality.
7	Owner	This field shows the name of the user who created the entity configuration record.

You can add or view the configuration steps related to selected ‘main configuration’ as mentioned in below screenshot:



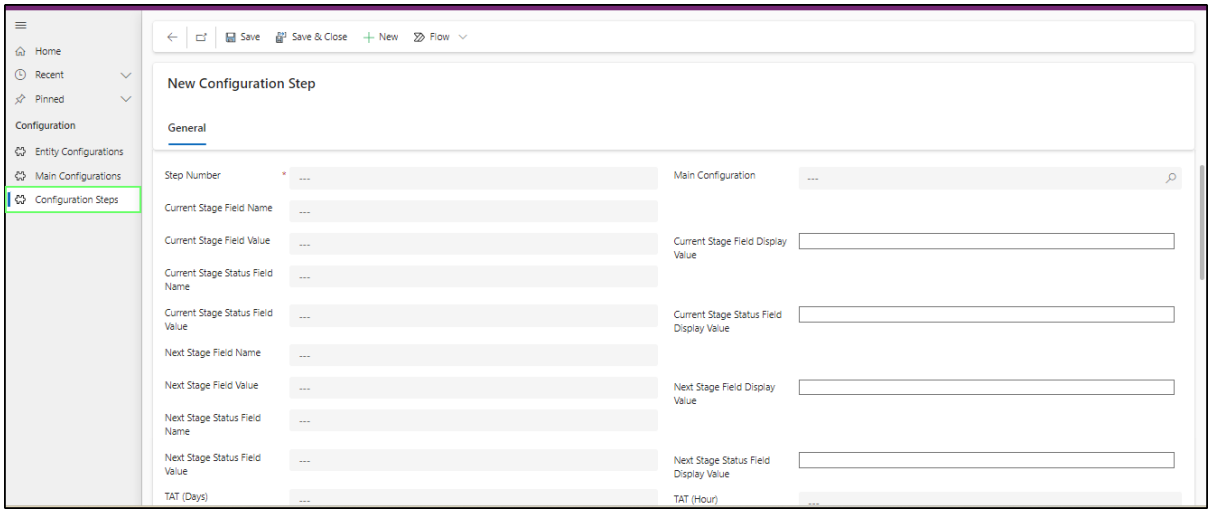
4.2.2 Configuration steps

4.3 Configuration Steps

The main configuration is an aspect of the multi-stage process configuration solution in Microsoft Dynamics 365. It encompasses the primary settings and parameters that govern how the multi-layer functionality operates for a specific entity within the application.

The main configuration in the multi-stage process configuration solution for Microsoft Dynamics 365 is a vital setup that defines how the multi-layer stages and statuses will function for a specific entity. By carefully configuring the entity, TAT functionality, and utilizing the auto-generated configuration number, organizations can achieve streamlined, efficient, and well-monitored workflows.

Configuration Step Details:



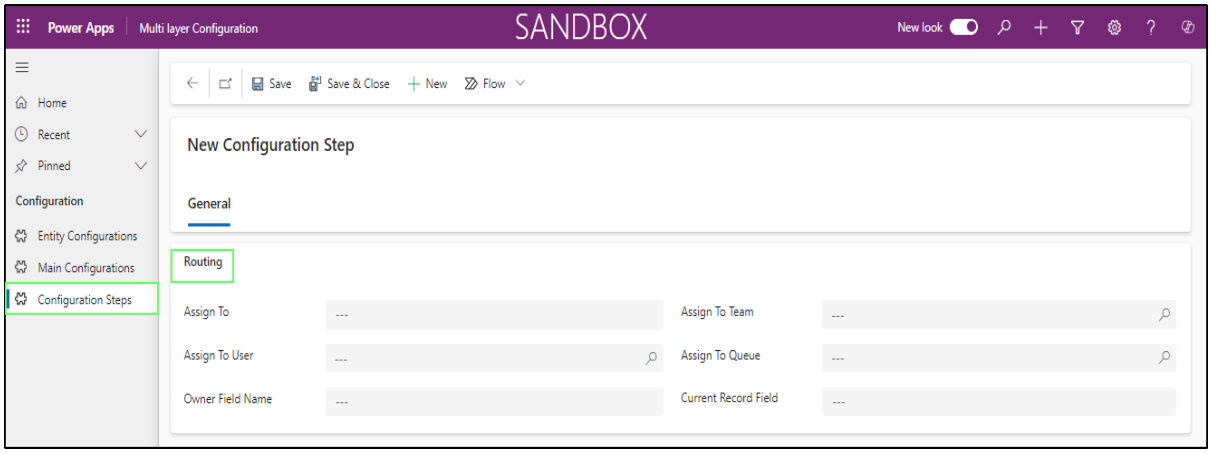
4.3.1 Configuration steps

General details:

Sr. No.	Field Name	Field Description
1	Step Number	Enter the step number.
2	Main Configuration	Select the main configuration.
3	Current Stage Field Name	Enter the schema name of the 'current stage field name' from an entity.
4	Current Stage Field Display Value	Select 'Current Stage Field Display Value' as per the details entered in 'Current Stage Field Name'.
5	Current Stage Field Value	Enter the GUID of the 'Current Stage Field Name'. If you select 'Current Stage Field Display Value', the system will automatically pick the GUID in this field. Or you can enter it manually as well.
6	Current Stage Status Field Name	Enter the schema name of the 'Current Stage Status Field Name'.
7	Current Stage Status Field Display Value	Select 'Current Stage Status Field Display Value' as per the details entered in 'Current Stage Status Field Name'.
8	Current Stage Status Field Value	Enter the GUID of the 'Current Stage Status Field Name'. If you select 'Current Stage Status Field Display Value', the system will automatically pick the GUID in this field. Or you can enter it manually as well.
9	Next Stage Field Name	Enter the schema name of the 'Next stage field name' from an entity.
10	Next Stage Field Display Value	Select 'Next Stage Field Display Value' as per the details entered in 'Next Stage Field Name'.

Sr. No.	Field Name	Field Description
11	Next Stage Field Value	Enter the GUID of the 'Next Stage Field Name'. If you select 'Next Stage Field Display Value', the system will automatically pick the GUID in this field. Or you can enter it manually as well.
12	Next Stage Status Field Name	Enter the schema name of the 'Next Stage Status Field Name'.
13	Next Stage Status Field Display Value	Select 'Next Stage Status Field Display Value' as per the details entered in 'Next Stage Status Field Name'.
14	Next Stage Status Field Value	Enter the GUID of the 'Next Stage Status Field Name'. If you select 'Next Stage Status Field Display Value', the system will automatically pick the GUID in this field. Or you can enter it manually as well.
15	TAT (Days)	Enter the days for this step.
16	TAT (Hour)	Enter hours for this step.
17	Step Outcome	-
18	Owner	This field shows the name of the user who created the entity configuration record.

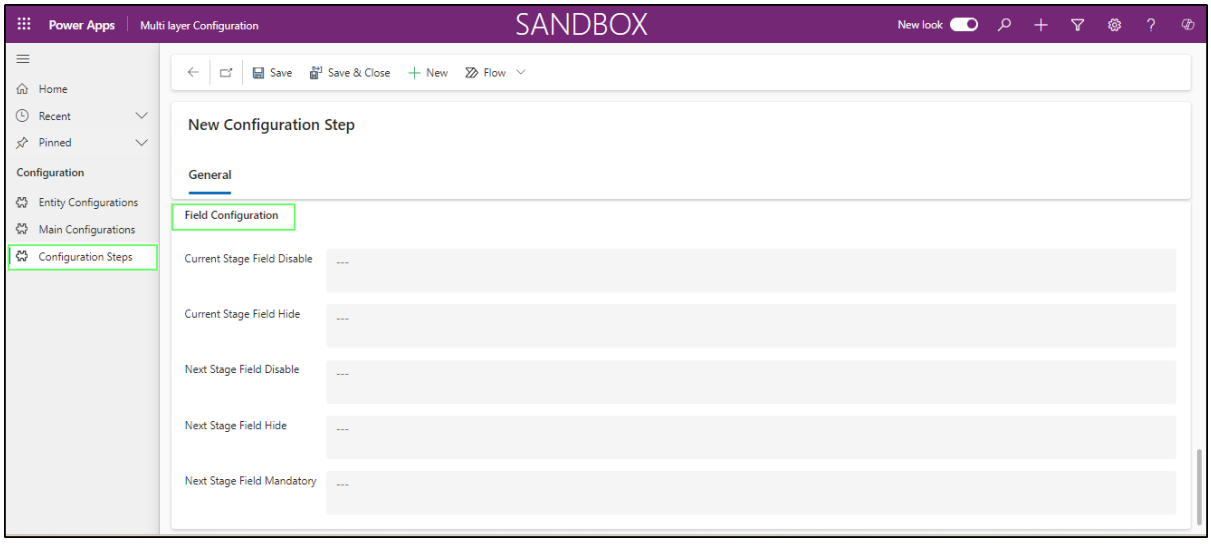
Routing details:



4.3.2 Routing

Sr. No.	Field Name	Field Description
19	Assign To	You can assign this step to any appropriate option mentioned below: 1. User (if you select the option as 'User' then you must add the user under field 'Assign to user' or else keep this blank) 2. Team (if you select the option as 'Team' then you must add the team under field 'Assign to Team' or else keep this blank) 3. Creator (if you select the option as 'User' then you must add the user under field 'Assign to user' or else keep this blank) 4. Owner field (if you select the option as 'Owner Field' then you must add the owner under field 'Owner Field Name' or else keep this blank) 5. Current record field (if you select the option as 'Current Record Field' then you must add the user under field 'Current Record Field' or else keep this blank)
20	Assign to User	If you select the 'Assign To-User' then you must add the user under field 'Assign to user' or else keep this blank.
21	Assign To Team	If you select the 'Assign To - Team' then you must add the team under field 'Assign to Team' or else keep this blank.
22	Assign to Queue	If you select the 'Assign To - Team' then you must add the queue under field 'Assign to Team' or else keep this blank.
23	Owner Field Name	If you select the 'Assign To - Owner Field' then you must add the owner under field 'Owner Field Name' or else keep this blank.
24	Current Record Field	If you select the option as 'Current Record Field' then you must add the user under field 'Current Record Field' or else keep this blank.

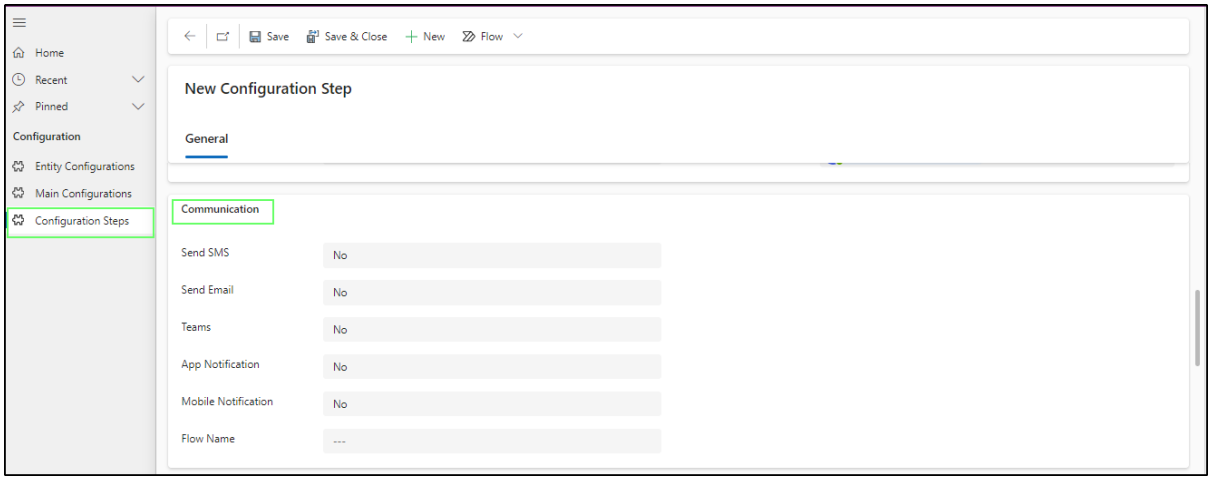
Field configuration details:



4.3.3 Field Configuration

Sr. No.	Field Name	Field Description
24	Current Stage Field Disable	This option allows you to disable the current stage field, making it non-editable.
25	Current Stage Field Hide	This option hides the current stage field from the user interface.
26	Next Stage Field Disable	This option disables the next stage field, making it non-editable.
27	Next Stage Field Hide	This option hides the next stage field from the user interface.
28	Next Stage Field Mandatory	This option makes the next stage field mandatory, requiring a value before proceeding.

Communication details:



4.3.4 Communication

Sr. No.	Field Name	Field Description
29	Send SMS	Select “Yes” if you want to send SMS or “NO” if you do not want to send an SMS.
30	Send Email	Select “Yes” if you want to send an Email or “NO” if you do not want to send email.
31	Teams	Select Yes if you want to connect on Teams or NO if you do not want to connect.
32	App Notification	Select “Yes” if you want notifications or updates or “NO” if you do not want any notifications or updates.
33	Mobile Notification	Select “Yes” if you want mobile notifications or “NO” if you do not want any mobile notifications.
34	Flow Name	Enter the flow name.

Thank You!

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