



## Business Process Checklist

**Work smarter, and deliver faster by enforcing best practices in your day-to-day process**



# Need for Productivity in CRM



**30-50%**  
Increase in  
User productivity



**15%**  
Increase in  
Internal rate of returns



**70%**  
Increase in  
Projects success rate

**Increased Productivity**

**Reduced Manual Work**



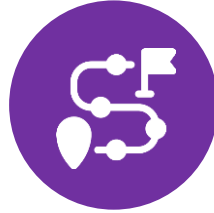
**Automate Complex Tasks**

**Increases Efficiency**

# Key Features

## Create and Manage Plans

Managers can enforce the best practices within their team and drive better results by creating and managing step-by-step plans for the users to follow within Dynamics 365 CRM.



## View and Follow set Plans

Users can view the predefined plan and follow it step by step for their day-to-day tasks.



## Set up activities

Add actionable steps like automatically sending emails, creating phone calls, or any other custom activities within your plan.



## Track Progress

Managers and users can keep track of the activities that have been completed, the ones that are still overdue, and those that are ongoing throughout the day.



## Set Plans for Business Process Flow and Custom Groups

Managers can set up plans for each stage of the Business Process Flow as well as Custom Groups and guide the users in streamlining their processes.



# Available for

## Supported Versions

Dynamics 365 v9.1 and above

Microsoft Dataverse



**Business Process  
Checklist**

DYNAMICS 365 ONLINE

Deployments



# Create and Manage Plans

Managers can create, revise and delete plans as per their business requirements and guide users accordingly.

The screenshot displays the Dynamics 365 Business Process Checklist interface. The top navigation bar includes the Dynamics 365 logo and the title 'Business Process Checklist'. Below this, a sidebar on the left lists various navigation options: Home, Recent, Pinned, My Work, Plan Step Items, Administration (BPC Settings, Plans, License Registration), Analysis (Logs), and Help (User Manual). The main content area shows a 'Lead Nurturing' plan, which is currently 'Saved'. The plan is titled 'Lead Nurturing - Saved' and is owned by 'Shane Warner'. The plan is currently in 'Lead' status. The plan details are visible, showing three steps: 'Step 1: Get detail...', 'Step 2: Verify the ...', and 'Step 3: Send the f...'. Each step contains a list of actions: 'Get details from ...', 'Verify the details ...', and 'Send the final e...'. Each step also has a 'Wait until not set' option. The plan is currently in 'Lead' status, and the 'Publish' button is visible. The plan is currently in 'Lead' status, and the 'Publish' button is visible.

# Plan

Managers can create different plans (such as Processes or Checklists) for their users to follow by filling in the necessary details against the record.

**Dynamics 365** Business Process Checklist

Home Recent Pinned My Work Administration BPC Settings Plans License Registrati... Analysis Logs Help User Manual

Save Save & Close New plan Publish Deactivate Delete Refresh Share

## Lead Nurturing - Saved Plan

Draft Status Reason Lead Record Type Bob Mike Owner

Plan Details Manage Steps Related

### Details for plan

Name *	Lead Nurturing
Description *	This plan is been created for the lead nurturing records

### Plan detail settings

Plan Type *	Process
Priority Order *	1

Plan For (If not selected, the plan will be created against record)

Business Process Flow

Custom Groups

### Criteria for the execution of plan

Criteria Mode	---
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# Plan Steps

Multiple steps can be added to the plan by the manager, so that users can perform the steps accordingly.

The screenshot displays the Dynamics 365 Business Process Checklist interface. The main window shows a 'Lead Nurturing' plan in the 'Manage Steps' tab. A 'Quick Create: Plan Step' dialog is open, allowing the user to add a new step. The dialog includes fields for 'Name' (e.g., 'Verify the details of the customer'), 'Description' (e.g., 'The details needs to be verified of the customer'), and 'Add waiting period for this step' (Days and Hours). The background interface shows the plan details, including the status 'Draft', record type 'Lead', and owner 'Shane Warner'. The 'Add an action' button is highlighted with a green box, indicating the next step in the process.

# Plan Step Actions

Multiple actions can be added inside the plan steps which will be performed according to the satisfied criteria.

The screenshot displays the Dynamics 365 Business Process Checklist interface. The main window shows a plan titled "Lead Nurturing" in a "Draft" status, owned by Justin Hunter. The "Manage Steps" tab is active, showing a step titled "Step 1: Get detail...". Below the step title, there is a button labeled "Add an action" and a "Wait until not set" option. A "Quick Create: Plan Step Action" dialog is open on the right, showing details for a plan step action. The dialog includes fields for "Select Action" (set to "Phonecall"), "Plan Step" (set to "Get details for customer"), "Title" (set to "Get details for customer via phone call"), and "Description" (set to "Need to get the details from the customer via phone call"). The "Criteria for the execution of plan step action" section shows "Execution Order" set to "1" and "Criteria Mode" set to "---". The dialog has "Save and Close" and "Cancel" buttons at the bottom.



# Set Plans for Business Process Flow and Custom Groups

The image displays two screenshots of the Dynamics 365 Business Process Checklist interface. The top screenshot shows a 'Lead Nurturing' work plan with steps like 'Qualify (2/2)', 'Develop (0/2)', 'Propose (0/2)', and 'Close (0/2)'. The bottom screenshot shows a 'Loan Verification' work plan with steps like 'Home Verification (1/2)' and 'Income Verification (0/2)'. Both screenshots show a sidebar with navigation options like Home, Recent, Pinned, My Work, Administration, Analysis, and Help.

# Auto Attach the Plan to Record

According to the criteria, the plan will be attached to the record, where user can complete their steps on “one-click”.

The screenshot displays the Dynamics 365 Business Process Checklist interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work (with Plan Step Items selected), Administration (BPC Settings, Plans, License Registration), Analysis (Logs), and Help (User Manual). The main area is titled 'My Day' and shows a list of tasks categorized into 'Open (4)' and 'Completed (3)'. The 'Open' tasks include 'Verify the details of customer' (Alex Braker, STEP 2 OF 3), 'Collect the customer proposal' (Interested in Gamifics, STEP 1 OF 1), 'Get details from customer' (Peter Lee, STEP 1 OF 3), and 'Verify the details of customer' (Shane Warner). The 'Completed' tasks include 'Get details from customer' (Alex Braker, STEP 1 OF 3), 'Collect the customer proposal' (Looking for BPC product, STEP 1 OF 1), and 'Get details from customer' (Shane Warner, STEP 1 OF 3). On the right, a detailed view of the 'Verify the details of customer' task for Alex Braker is shown, with a progress bar at 33%. The task steps are: 'Get details from customer' (checked), 'Verify the details of customer' (unchecked), and 'Send the final email after verification' (unchecked).

# View and Follow set Plans

Users can simply view the plan and the steps within the plan to perform as instructed right within their Dynamics 365 CRM.

The screenshot displays the Dynamics 365 Business Process Checklist interface. The top navigation bar includes the Dynamics 365 logo, the title 'Business Process Checklist', and various utility icons. A left-hand navigation pane lists sections like 'Home', 'Recent', 'Pinned', 'My Work', 'Administration', 'Analysis', and 'Help'. The main content area is titled 'My Day' and is divided into two columns: 'Open (4)' and 'Completed (3)'. Each column lists tasks for three users: Alex Braker (AB), Peter Lee (PL), and Shane Warner (SW). Tasks include 'Verify the details of customer' and 'Get details from customer', each with a date (22 Nov) and a step indicator (e.g., STEP 2 OF 3). A right-hand pane shows a detailed view of a 'Work Plan: Lead Nurturing' for Alex Braker, with a 33% progress bar and a list of steps, some of which are checked off.

# View Plan Items on Record

Plans defined by the manager can be performed by the users to follow during there course of the day.

The screenshot displays the Inogic CRM interface for a lead record. At the top, a navigation bar includes icons for back, list, share, save, save & close, new, delete, refresh, check access, qualify, process, disconnect sequence, and a menu. Below this, the lead's name 'Peter Henery' is shown with a 'Saved' status and a 'Lead' type. A progress bar indicates the lead's stage: 'Lead to Opportunity Sal...' (Active for 8 days), 'Qualify (8 D)', 'Develop', 'Propose', and 'Close'. The 'Qualify' stage is currently active. The main content area is divided into three sections: 'Contact', 'Timeline', and 'Business Process Checklist'. The 'Contact' section shows fields for Topic, First Name, Last Name, Job Title, and Business Phone. The 'Timeline' section shows a search bar, a note entry field, and a timeline entry for 'Email from Sam Henderson' dated 6/28/2022 7:59 PM. The 'Business Process Checklist' section shows a progress bar at 33% and a list of tasks: 'Send introduction mail' (checked), 'Verify detail' (unchecked), and 'Setup demo call' (unchecked). The 'Verify detail' task has a description: 'Thank for the interest and take the product/services and the team...'. The 'Business Process Checklist' section is highlighted with a green border.

PH Peter Henery - Saved  
Lead · Lead ▾

Partner Lead Source Warm Rating New Status Sam Henderson Owner ▾

Lead to Opportunity Sal... Active for 8 days < Qualify (8 D) Develop Propose Close >

Summary Details Files Related

Contact

Topic\*

Osmois System

First Name\*

Peter

Last Name\*

Henery

Job Title

SE

Business Phone

Timeline

Search timeline

Enter a note...

SH Email from Sam Henderson  
Partner Email  
This is partner email.  
Overdue 6/28/2022 7:59 PM ▾

Business Process Checklist

Work Plan: Lead Nurturing

33% ☒ Send introduction mail

☐ Verify detail ...  
Thank for the interest and take the product/services and the team...

☐ Setup demo call

# Track the progress of tasks

With an intuitive progress bar, managers and users can track the completed tasks, ongoing and upcoming ones with visuals.

AB

Alex Braker

Work Plan: Lead Nurturing 🔍 1/3

33%

☒

Get details from customer  
This plan step is been created for getting the details from ...

>|

☐

Verify the details of customer  
Need to perform a task for verifying the details of customer.

>|

☐

Send the final email after verification  
This plan step is been created for sending the email after ...

>|

# What's next

## Get Started

In just 10 minutes!

Learn more about [Business Process Checklist](#)

Get your free Business Process Checklist FREE trial from our [website](#) or [Microsoft AppSource](#)

Email: [crm@inogic.com](mailto:crm@inogic.com)

# Why Us?



## Quality Products

Ability to deliver quality solutions quickly and at affordable prices



## Latest Technology

Our apps are aligned to Microsoft release cycle, and we make use of the latest and greatest technology available at any point.



## Partner and Customer led Product Roadmap

We proactively seek inputs from our partners and customers and design our product roadmap based on these.



## Customer Service

Our panel of product experts with vast industrial knowledge is quick to provide supportive solutions to any impromptu requests



## Community Driven

We believe in community growth along with business growth and hence engage in several employee training and engagement programs



# Thank You!

Email us at [crm@inogic.com](mailto:crm@inogic.com) for a live demo.  
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