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

Automate Complex Tasks

Reduced Manual Work

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

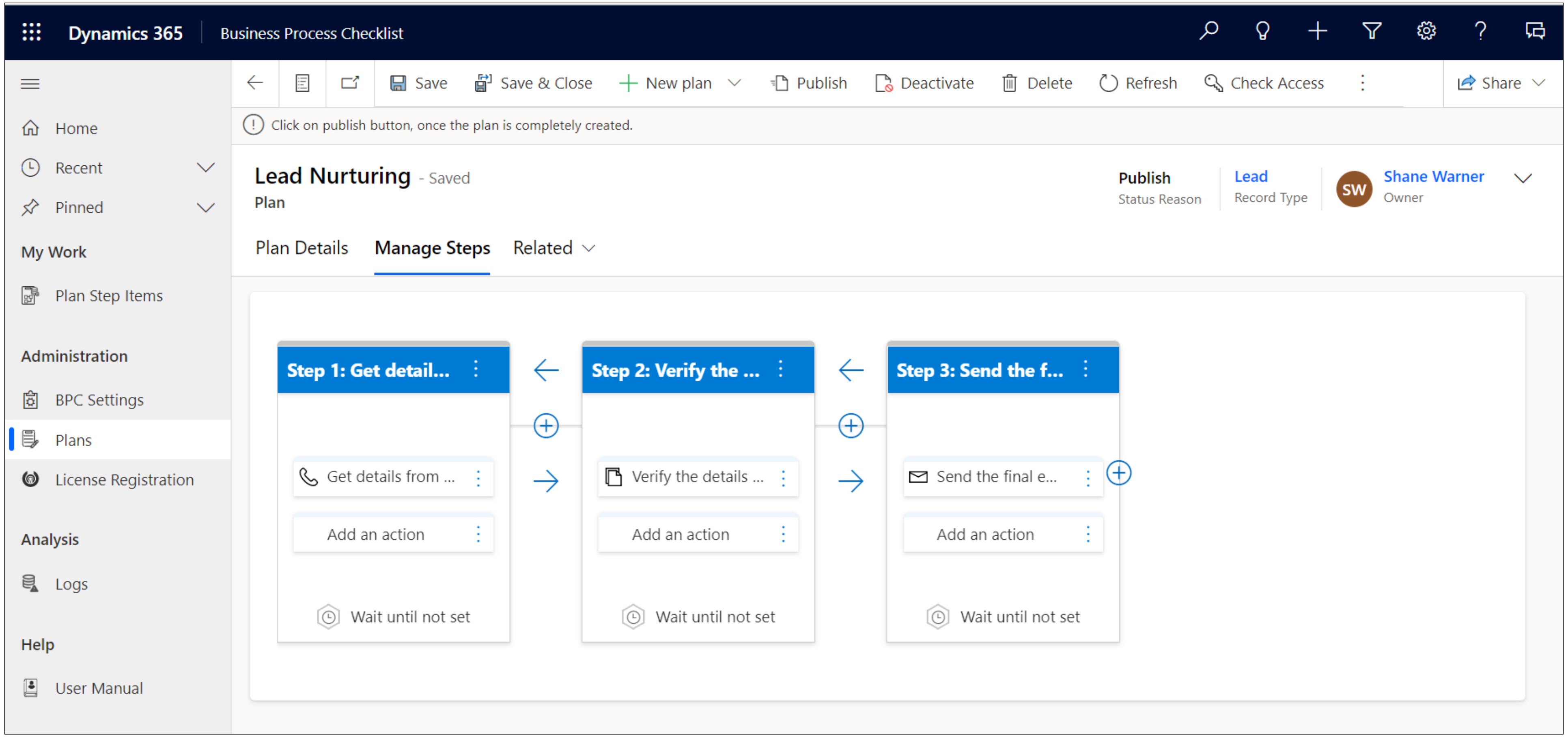
Business Process Checklist

DYNAMICS 365 ONLINE

Deployments

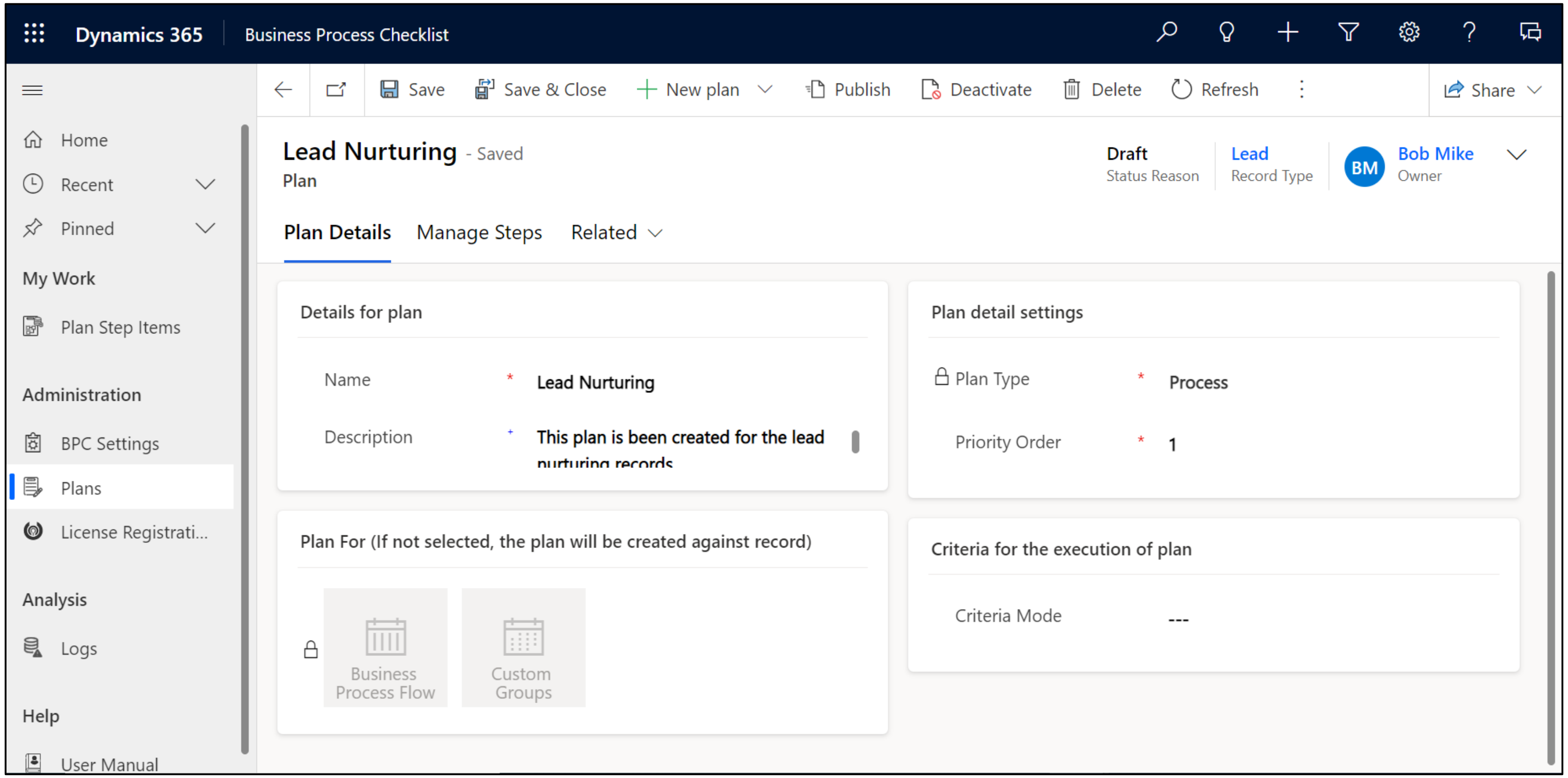
Create and Manage Plans

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



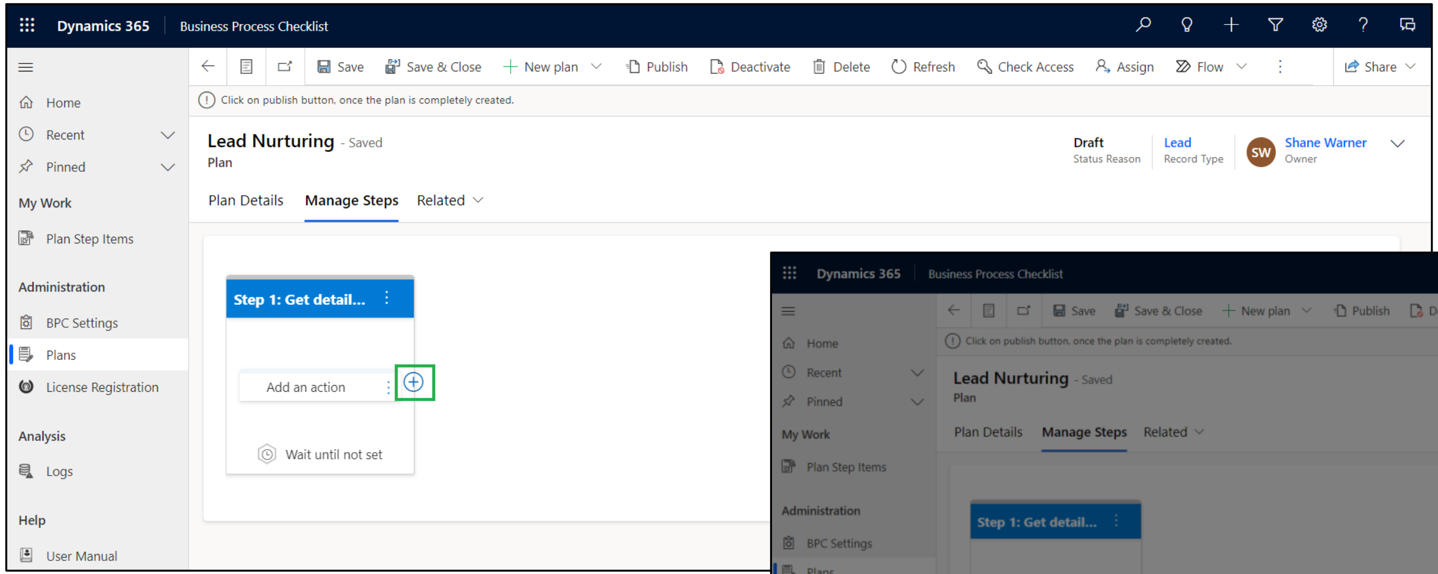
Plan

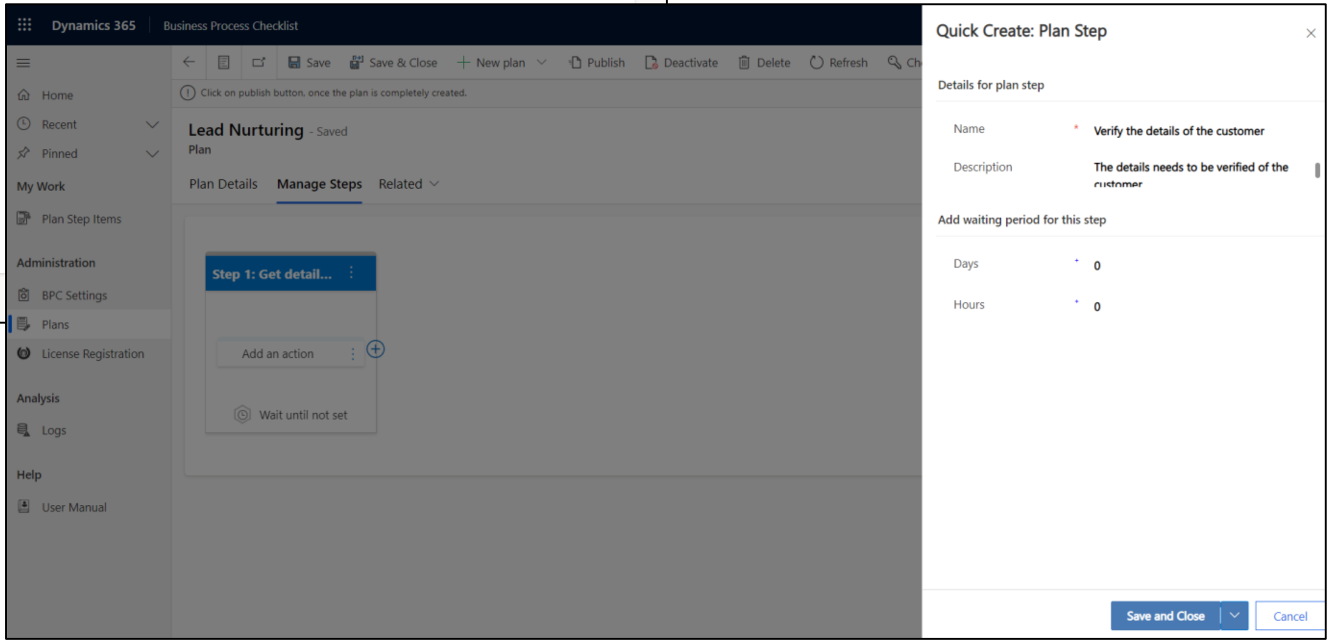
Managers can create different plans (such as Processes or Checklists) for their users to follow by filling in the necessary details against the record.



Plan Steps

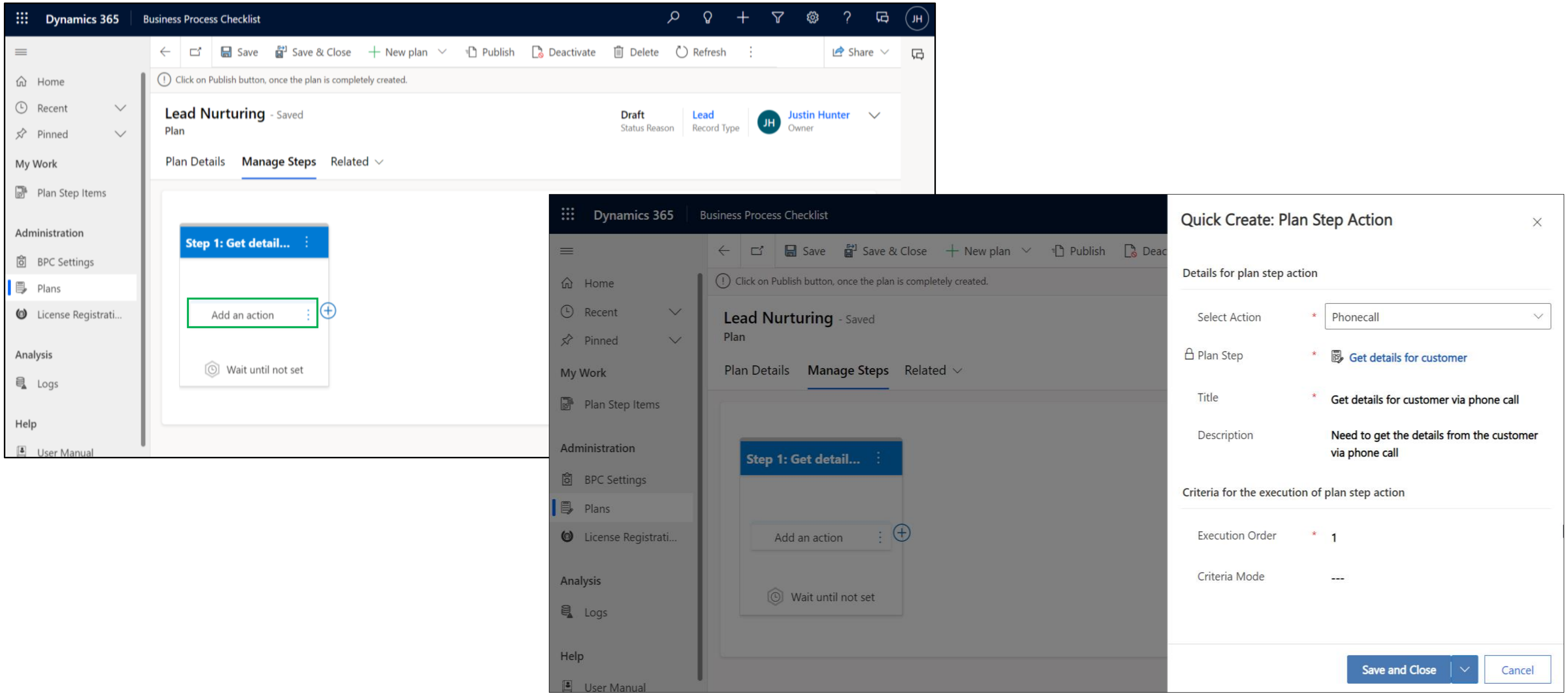
Multiple steps can be added to the plan by the manager, so that users can perform the steps accordingly.



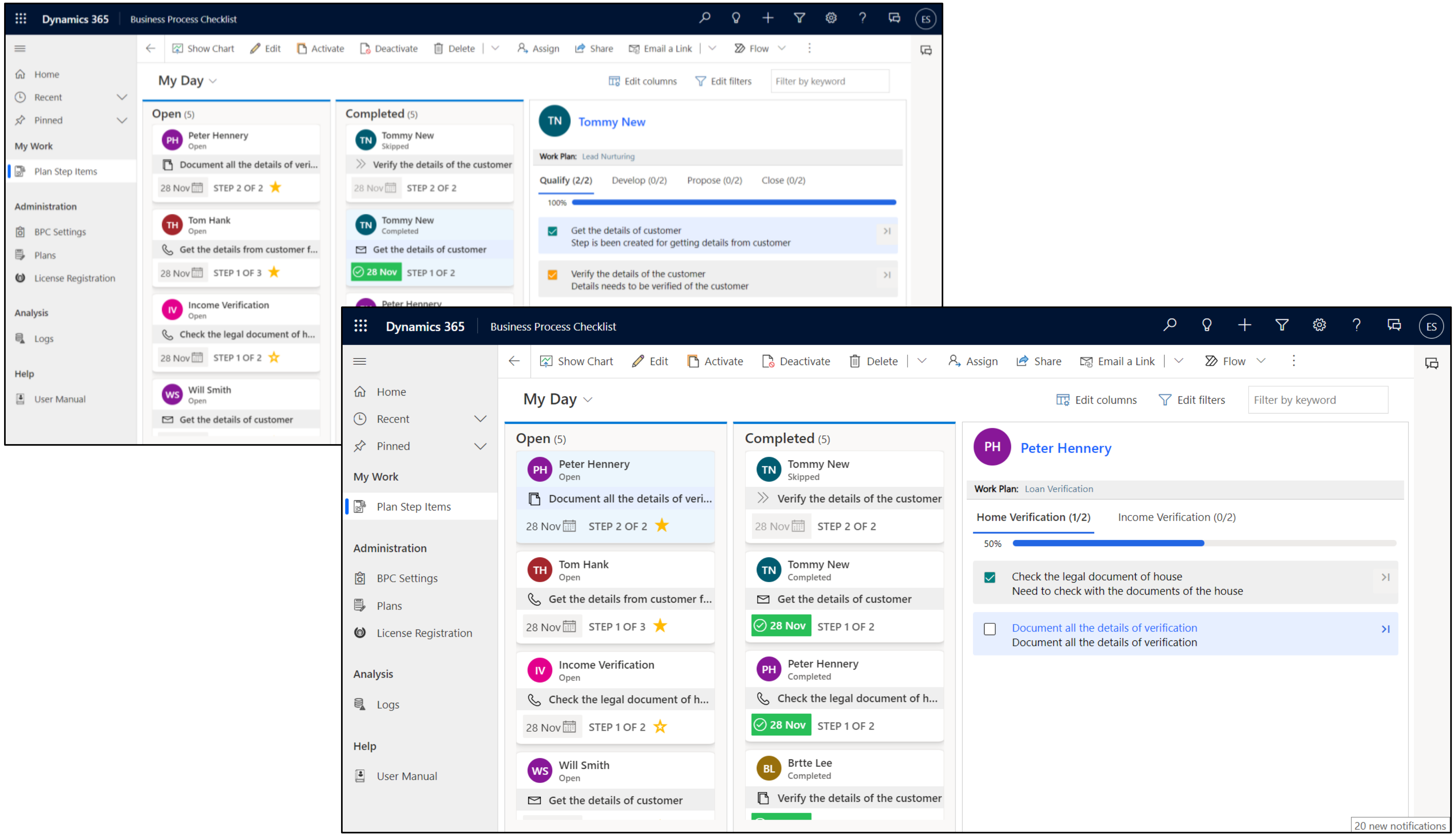


Plan Step Actions

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

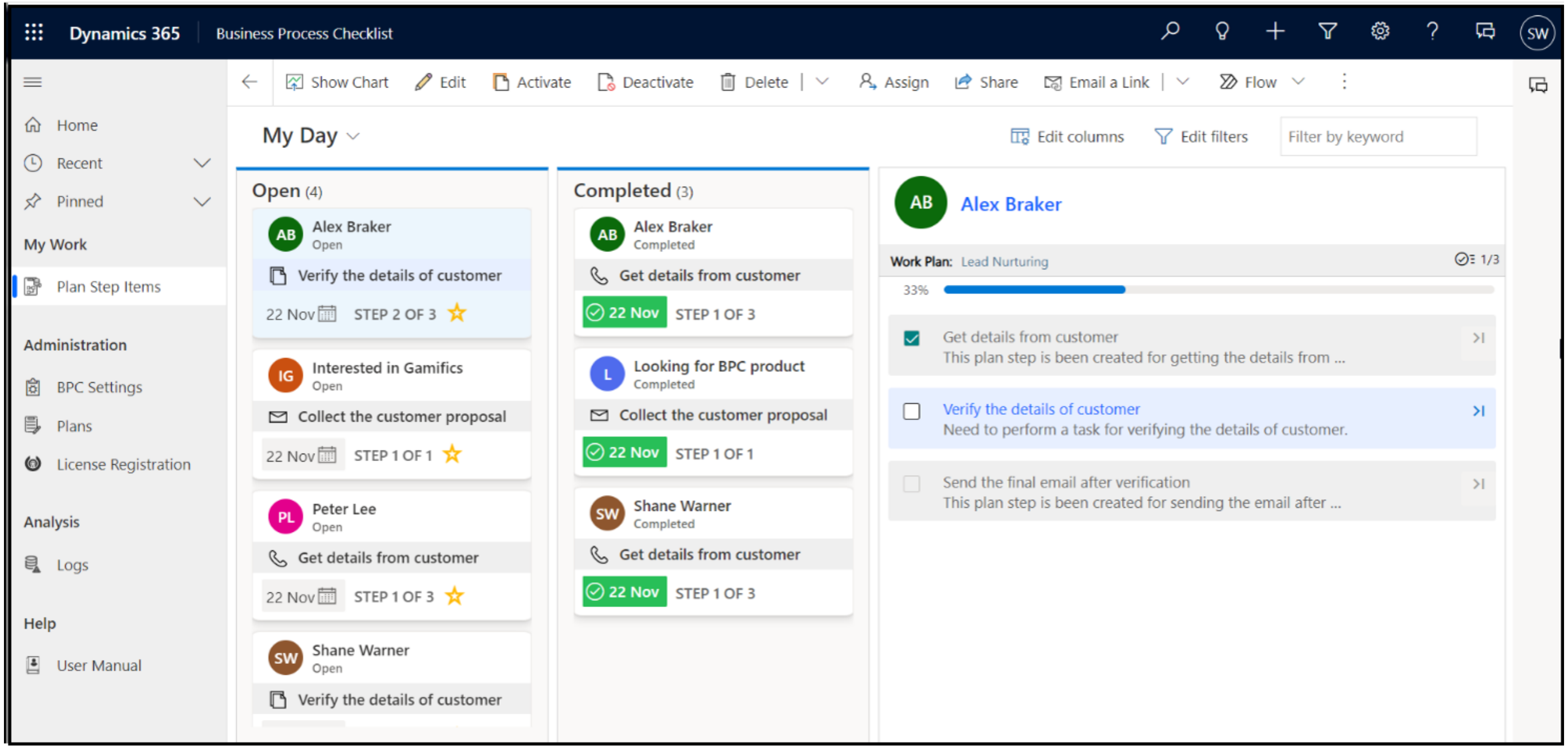


Set Plans for Business Process Flow and Custom Groups



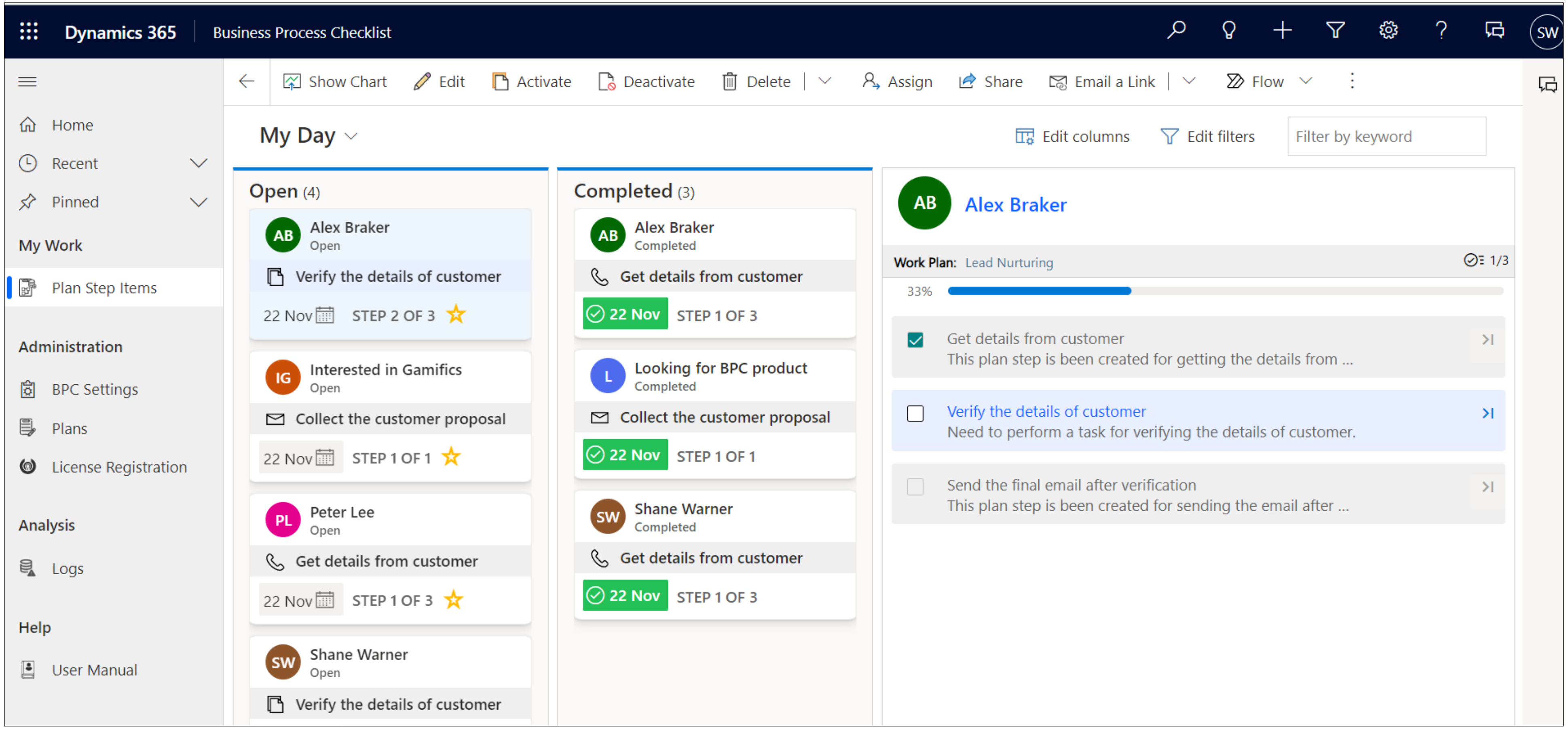
Auto Attach the Plan to Record

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



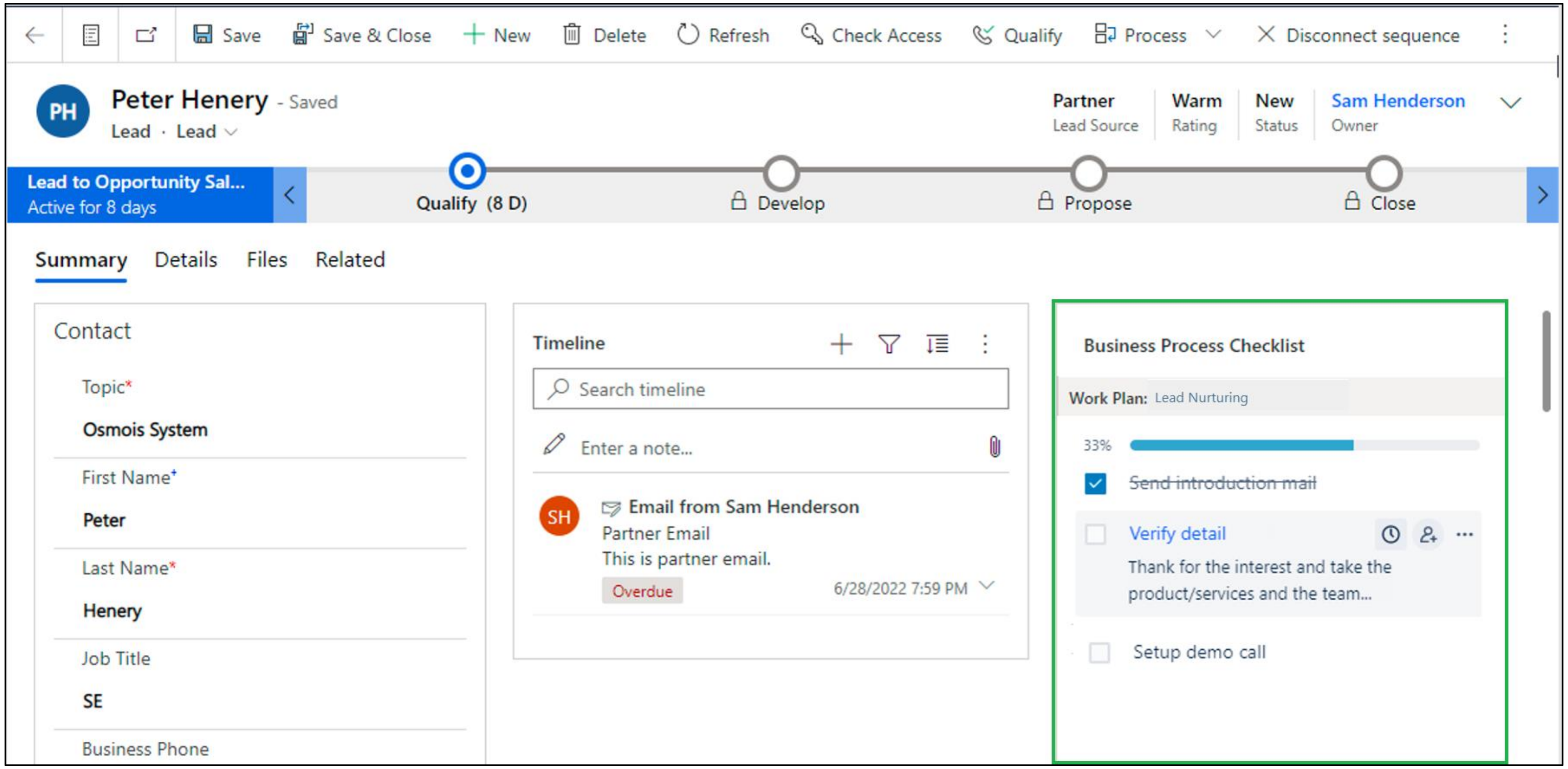
View and Follow set Plans

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



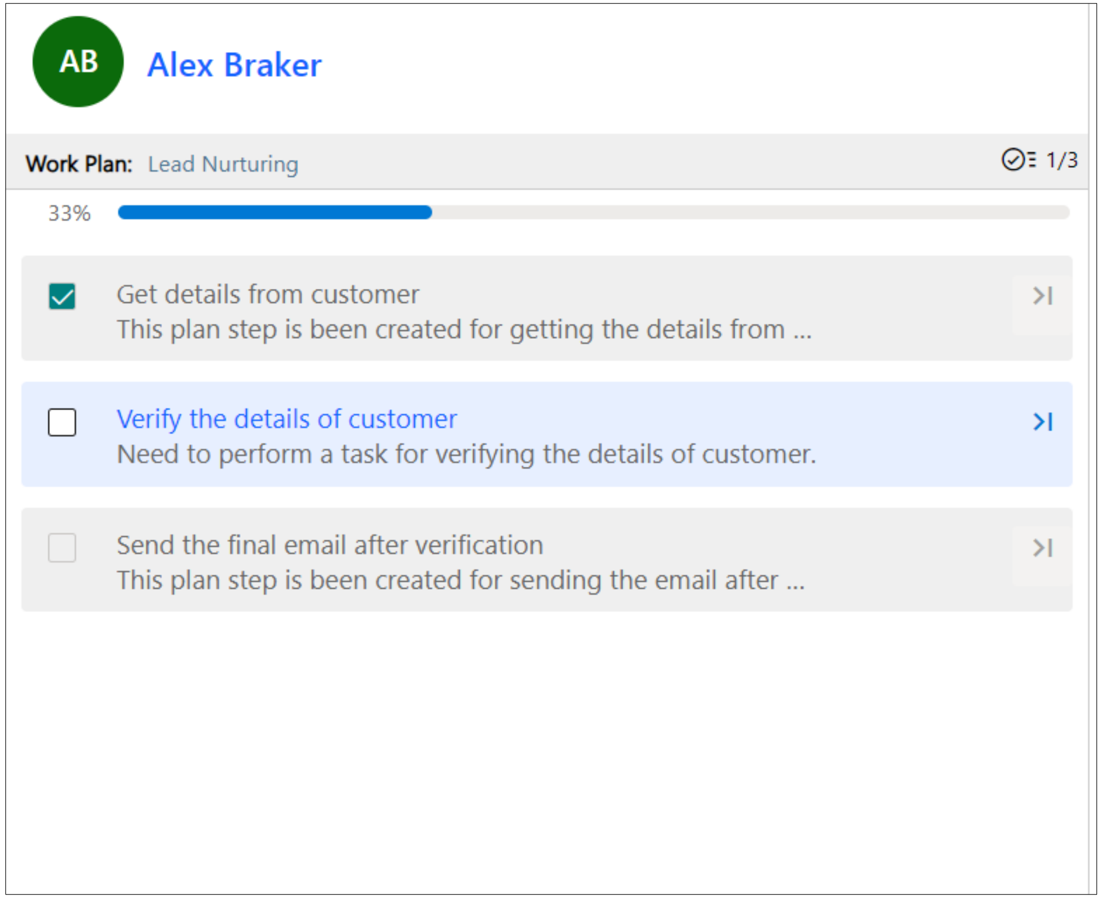
View Plan Items on Record

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



Track the progress of tasks

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



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

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!

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