

The icon is a blue square containing three horizontal bars with checkmarks: an orange bar at the top, a green bar in the middle, and a purple bar at the bottom. A white arrow on the left points upwards, and a white arrow on the right points downwards, indicating a process flow.

**Business Process  
Checklist**

**inogic**

**User Manual**

**Contents**

**Introduction..... 3**

**Security Roles ..... 3**

**Enable Record Type..... 4**

**Create Plan ..... 6**

    Process-Type plan: ..... 7

    Checklist-Type plan: ..... 17

**Create Plan for Business Process Flow..... 22**

    Process-Type plan for Business Process Flow:..... 23

    Checklist-Type Plan for Business Process Flow:..... 28

**Create Plan for Custom Groups..... 33**

    Process-Type plan for Custom Groups:..... 33

    Checklist-Type Plan for Custom groups: ..... 38

**Plan Items..... 52**

    Auto-Attach the Plan to Record..... 52

    View Record Details ..... 56

    View Plan Details..... 58

    View Plan Items on Record ..... 59

**Revise Plan ..... 42**

    Revise Plan - Process:..... 43

    Revise Plans-Checklist: ..... 46

**Delete Plans..... 48**

    Delete Plan - Process:..... 48

    Delete Plan - Checklist: ..... 51

**Data Migration..... 52**

    Export configurations from one environment to another:..... 60

    Import the same configuration in another environment: ..... 69

**Contact Us ..... 75**

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## Introduction

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Business Process Checklist is a Dynamics 365 CRM productivity app that helps users to simplify their internal processes by enforcing the best plan of action for day-to-day activities. Once the sales manager or administrator creates a checklist/plan/to-do list, it will automatically get connected against records or Business Process Flows when set conditions are met. Be it custom, OOB entities, or custom flows, users will have a predefined set of actions reflecting the organization's best practices to perform. With Business Process Checklist, set a plan of action for your salespeople/customer executives to follow and in the order, they want them to follow. Increase user productivity by better aligning your business processes with Business Process Checklist within your Dynamics 365 CRM.

### Salient Features:

- Setup two types of Plans – Checklist type and Process type
- Setup pre-defined process for CRM Users
- Setup actionable steps (Email, Phone Call & Task & Custom Activities)
- Setup process that has a set of steps with different stages or groups
- Dynamic conditional steps within the process
- Automatically associate or attach processes to records
- View the set of activities for users to follow
- Allow to mark the step as complete and can also see the progress
- Supports both OOB and custom Business Process Flows
- Supports both OOB and custom entities

**Available for:** Microsoft Dynamics 365 v9.1 and above, Dataverse.

**Deployment:** Online.

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## Security Roles

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This solution has two security roles: **Business Process Checklist Administrator** and **Business Process Checklist User**.

- **Business Process Checklist Administrator:** The user with **Business Process Checklist Administrator** security role is in charge of setting up the solution. They can activate the license, revise plans, delete plans, create and manage plans, etc.
- **Business Process Checklist User:** The user with **Business Process Checklist User** security role can use the plans created by the Business Process Checklist Administrator and follow the consecutive activities created by the Business Process Checklist Administrator.

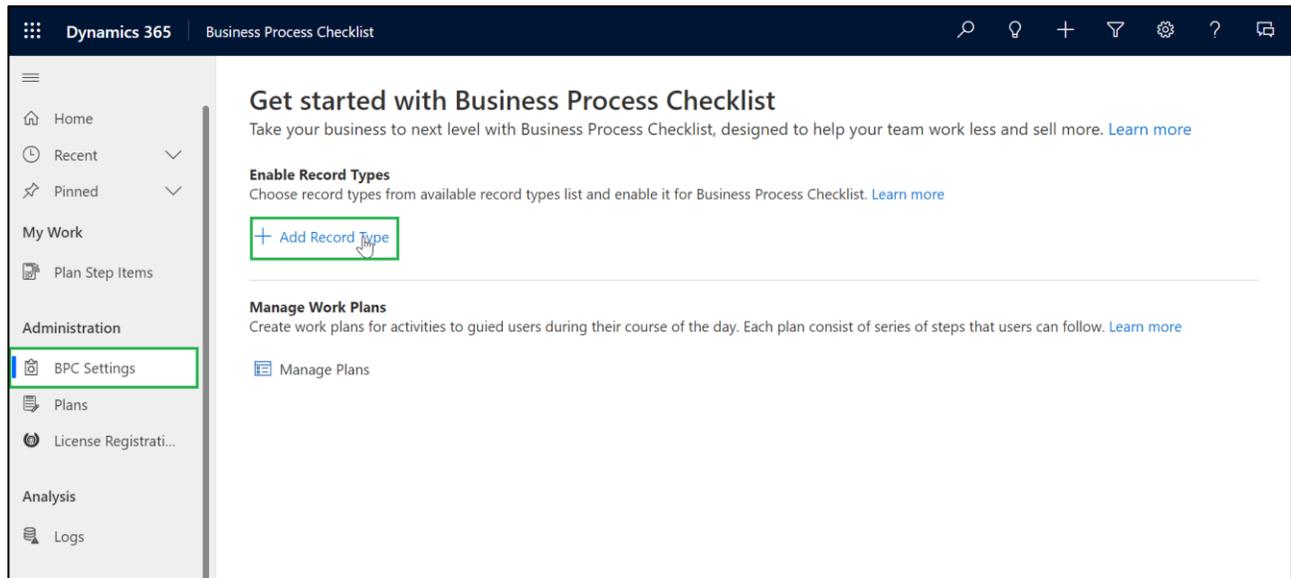
**Note:** *The entities (Record Types) can be enabled only by the Business Process Checklist Administrator.*

## Enable Record Type

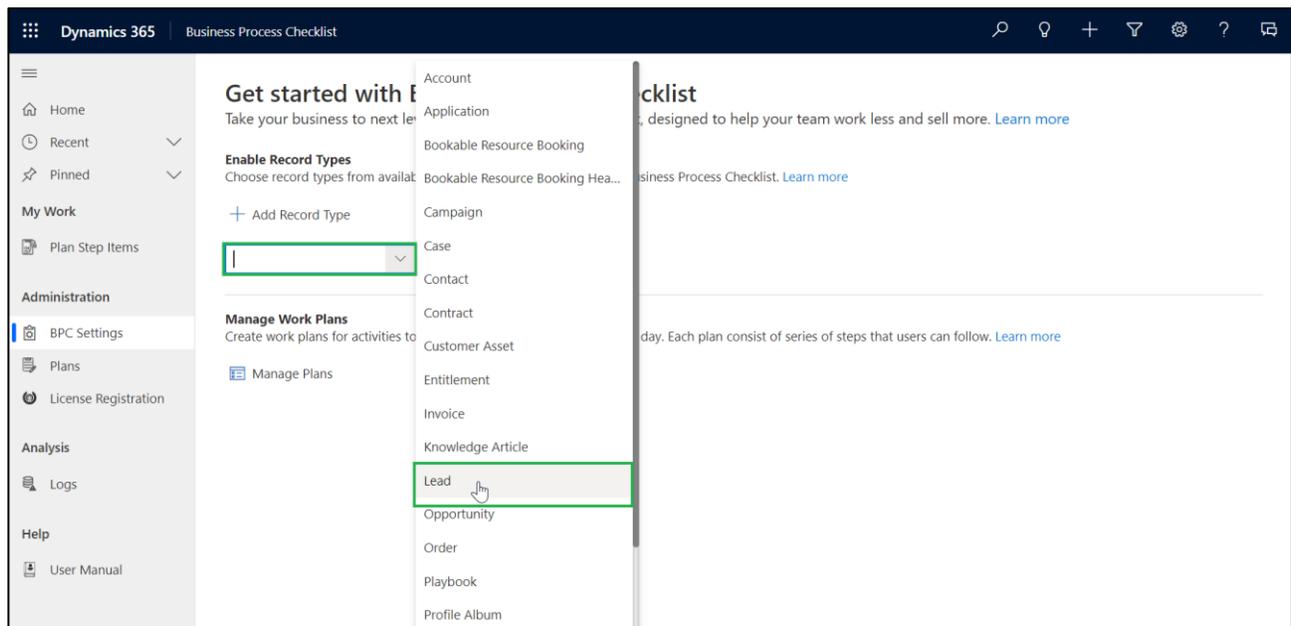
Enabling **Record Type** is essential for creating and managing plans in the Business Process Checklist App. Without enabling record types, you will not be able to create plans for specific records in Dynamics 365 CRM.

Below are the steps for enabling the Record Type for which the plan needs to be created in the Business Process Checklist App:

- Navigate to **Business Process Checklist App --> BPC Settings --> Add Record Type.**



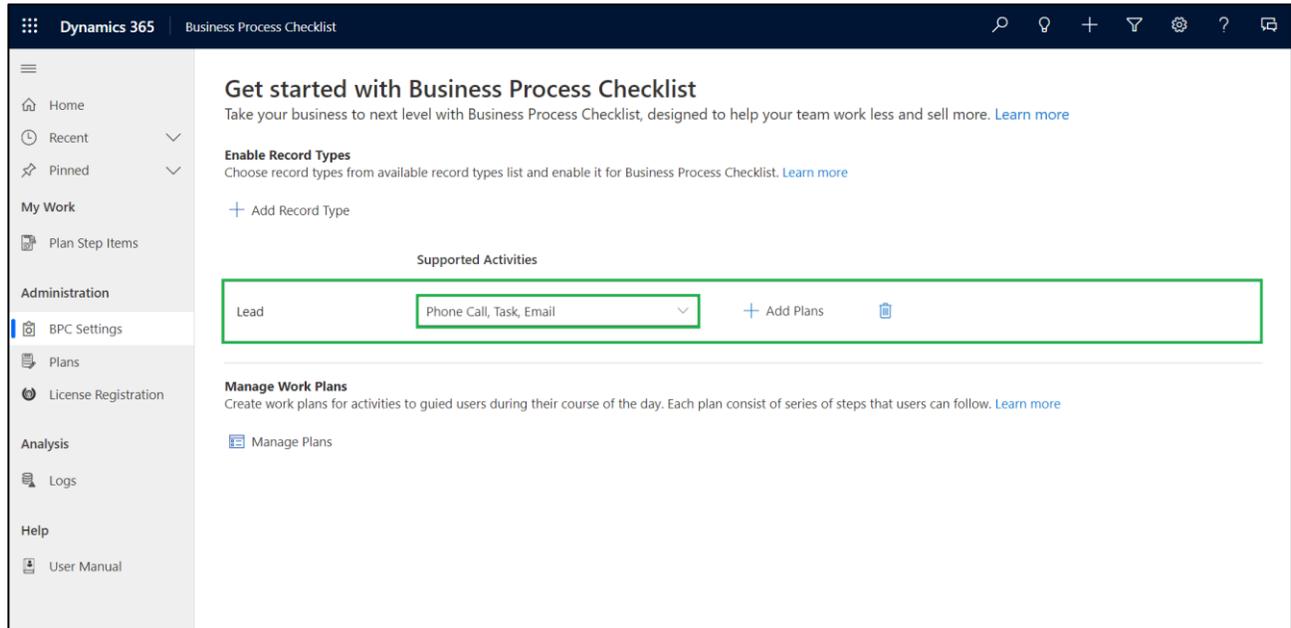
- Select the required **Record Type** from the appearing menu to enable it.



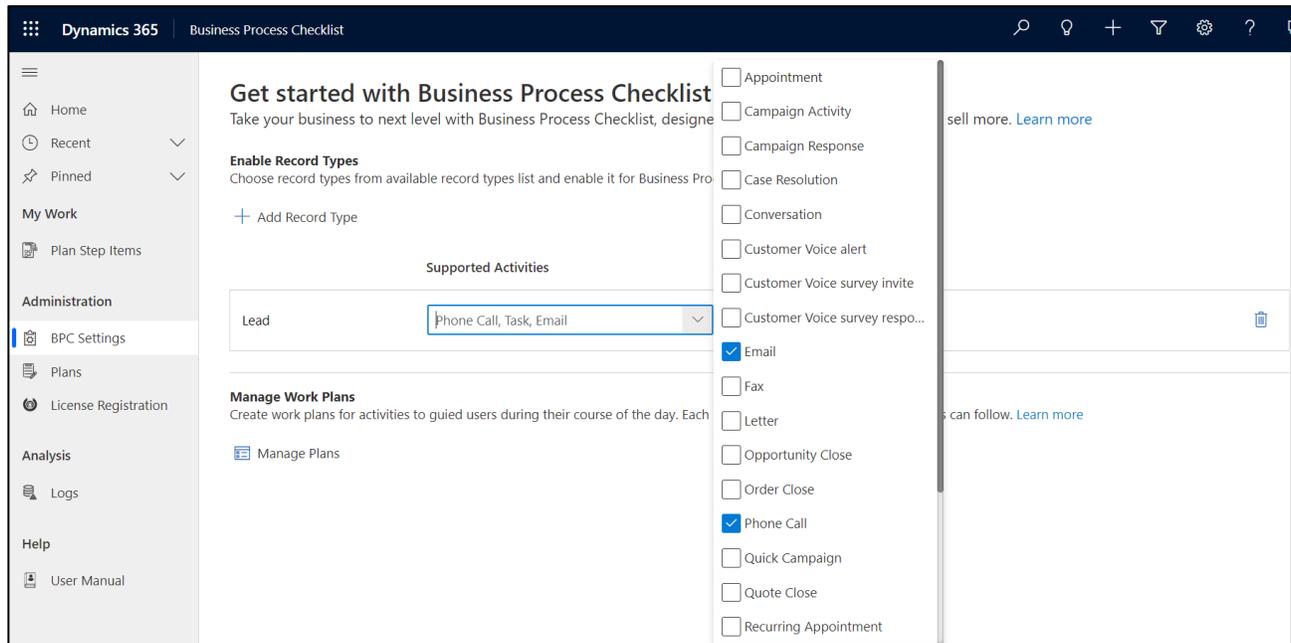
## Business Process Checklist – User Manual

- Now your **Enabled Record Types** will appear below, along with **Email, Phone Call & Task**, which are the three default supported activities.

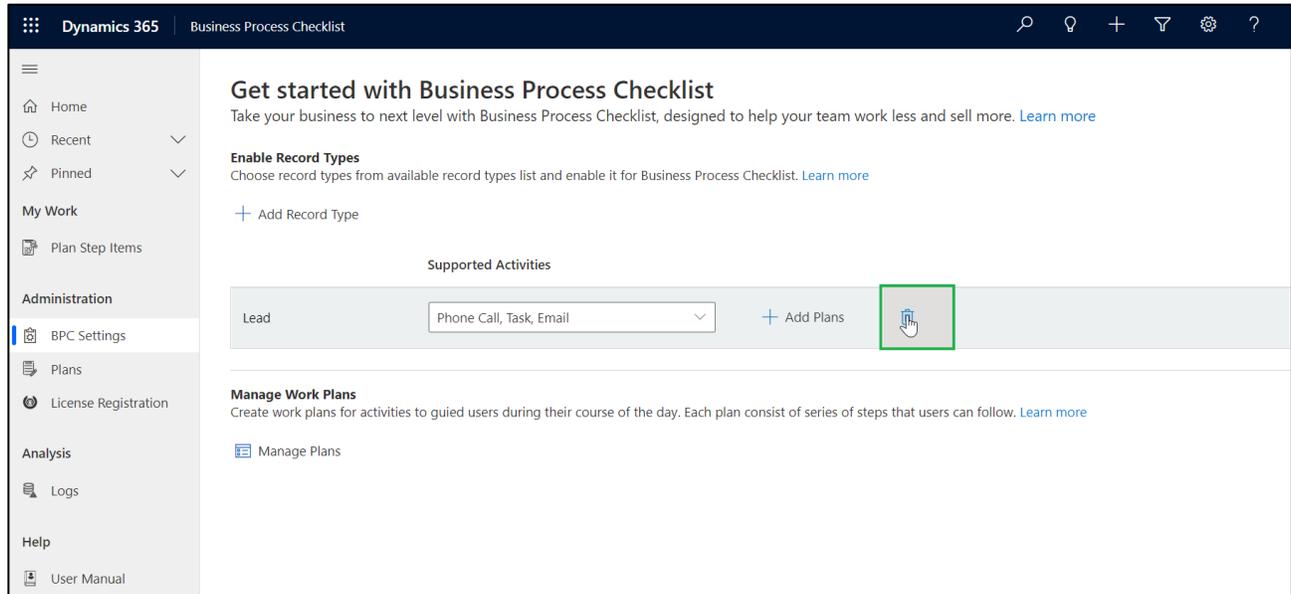
**Note:** Supported activities are activities through which tasks in the plan can be performed. For example, making a phone call to verify lead details in the lead nurturing plan.



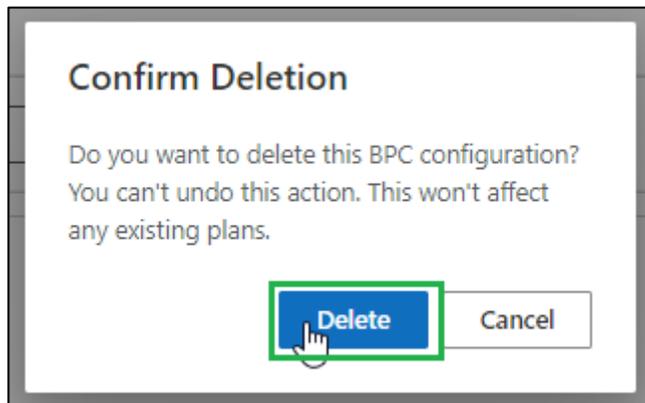
- Check or uncheck the supported activities as per business requirements.



- If you want to disable any record type, you can delete it by clicking on the **Delete icon**.



- Click on **Delete**.



In this way, you can enable and disable record types.

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### Create Plan

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Every organization has its own best practices and plan of action for completing its business processes most effectively.

Creating a plan helps you make business processes consistent by defining the tasks you want your users to perform and the order in which you want them to perform them.

This lets users focus on their core work, thereby increasing their efficiency and helping them understand their next plan of action.

Managers can create two types of plans based on business requirements:

- **Process-Type plan:** In a Process-Type plan, tasks can only be performed in a pre-defined order.
- **Checklist-Type plan:** In a Checklist-Type plan, tasks can be performed regardless of the set order.

To create both **Process and Checklist-Type** plans within Dynamics 365 CRM, users have to follow the simple steps given below:

## Process-Type plan:

Sometimes managers need to have a plan where the sequence of the tasks matters. And the user should not be able to proceed to the next task before completing the current one. A Process-Type plan is a type of plan that enables managers to create plans that are needed to be performed in sequential order.

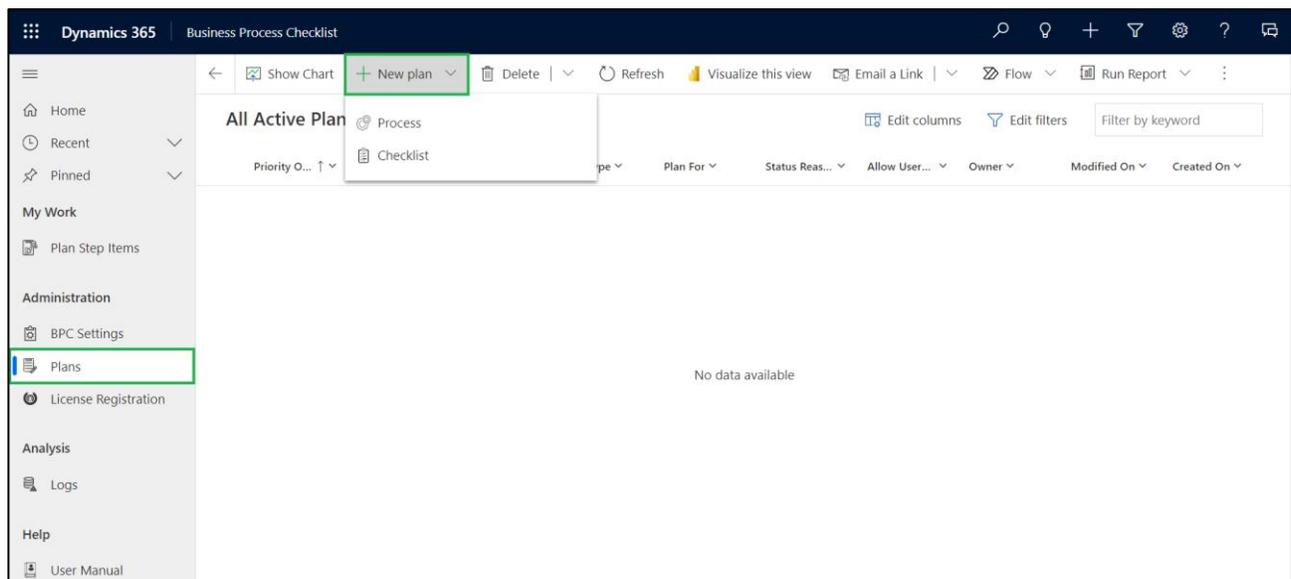
This is useful for creating plans where you want your salesperson to follow the guidelines in a predefined order and not randomly.

Below are the steps for creating a Process-Type plan:

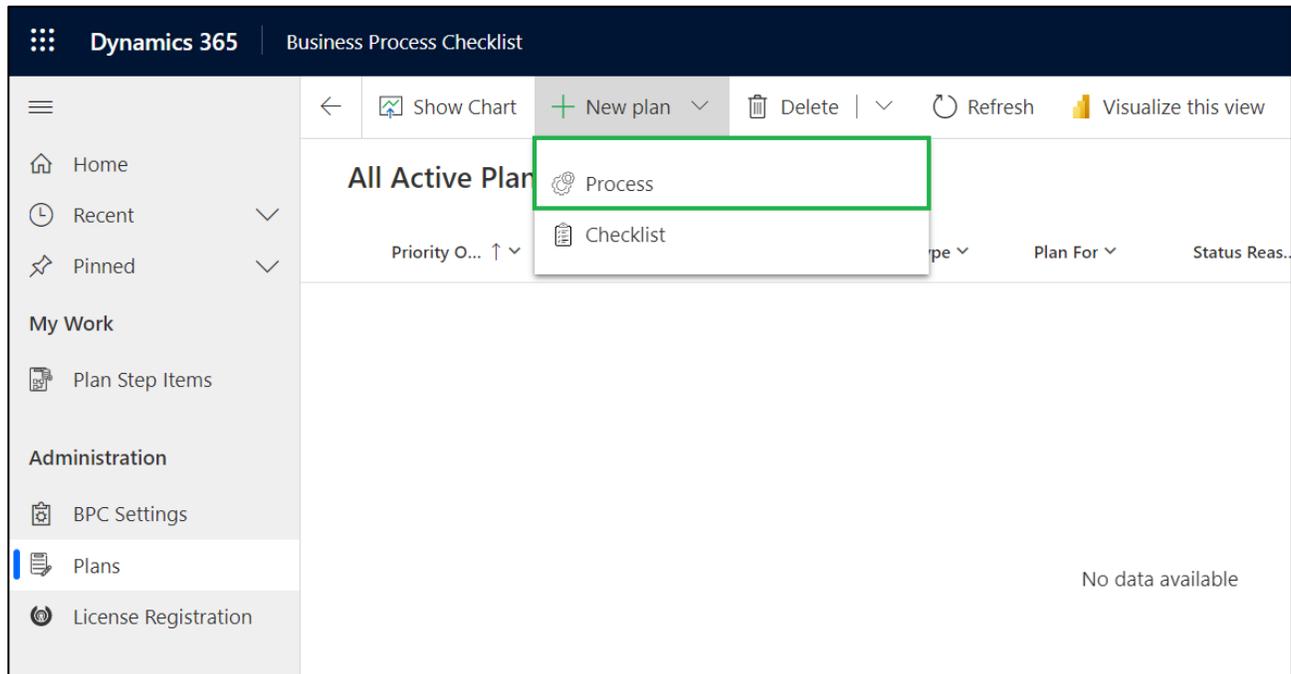
## Plan

To create a Process-Type plan, you need to create a plan first. Plans consist of multiple tasks/plan steps that are needed to be performed to complete a business process successfully.

- Navigate to **Business Process Checklist App --> Plans --> New Plan.**



- Click on the '**New plan**' button and select **Process**.



- This will open a 'New Plan' page, where you need to fill in the details.
  - **Name:** Provide a unique name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Plan Type:** Select Plan Type as **Process**.
  - **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.
  - **Record Type:** Select the **Record Type** for which the plan will be created. (E.g. Lead, Opportunity, Case, or Custom record type etc.)
  - **Set criteria for the execution of the Plan (Optional):** Set the criteria against the plan (the plan will automatically attach against those for which the criteria match). Select either **Simple** or **Advanced**.
    - **Simple:** Execute plans based on the conditions defined in view of an entity.
    - **Advanced:** Execute plans based on filtered criteria or conditions (conditions defined in Fetch XML).
  - **Plan for (Optional):** Users can create plans for **Business Process Flow** or **Custom Groups**. (If neither business process nor custom groups are selected, then the plan will be automatically created for the record type selected).
    - **Business Process Flow:** Select **Business Process Flow** to create a plan for Custom or OOB [Business Process Flows](#).
    - **Custom Groups:** Select **Custom Groups** to create a plan for [Custom Groups](#).
- Once the required fields are filled, click on 'Save'.

## Business Process Checklist – User Manual

The screenshot shows the 'New Plan' form in Dynamics 365. The 'Save' button is highlighted with a green box. The form contains the following fields:

- Name:** \* Lead Nurturing
- Description:** \* This plan is been created for the lead nurturing records
- Plan Type:** \* Process
- Priority Order:** \* 1
- Criteria Mode:** ---

Below the form, there are two options for 'Plan For': Business Process Flow and Custom Groups.

- The new plan will be created and can be seen on **Plans**.

The screenshot shows the 'All Active Plans' table in Dynamics 365. The 'Plans' menu item in the left navigation pane is highlighted with a green box. The table contains the following data:

| Priority O... | Name          | Record Type | Plan Type | Plan For | Status Reas... | Allow User... | Owner    | Modified On  | Created On   |
|---------------|---------------|-------------|-----------|----------|----------------|---------------|----------|--------------|--------------|
| 1             | Lead Nurtu... | Lead        | Process   |          | Publish        | No            | Bob Mike | 11/18/202... | 11/18/202... |

Now that we have created a plan, let's add plan steps to the plan.

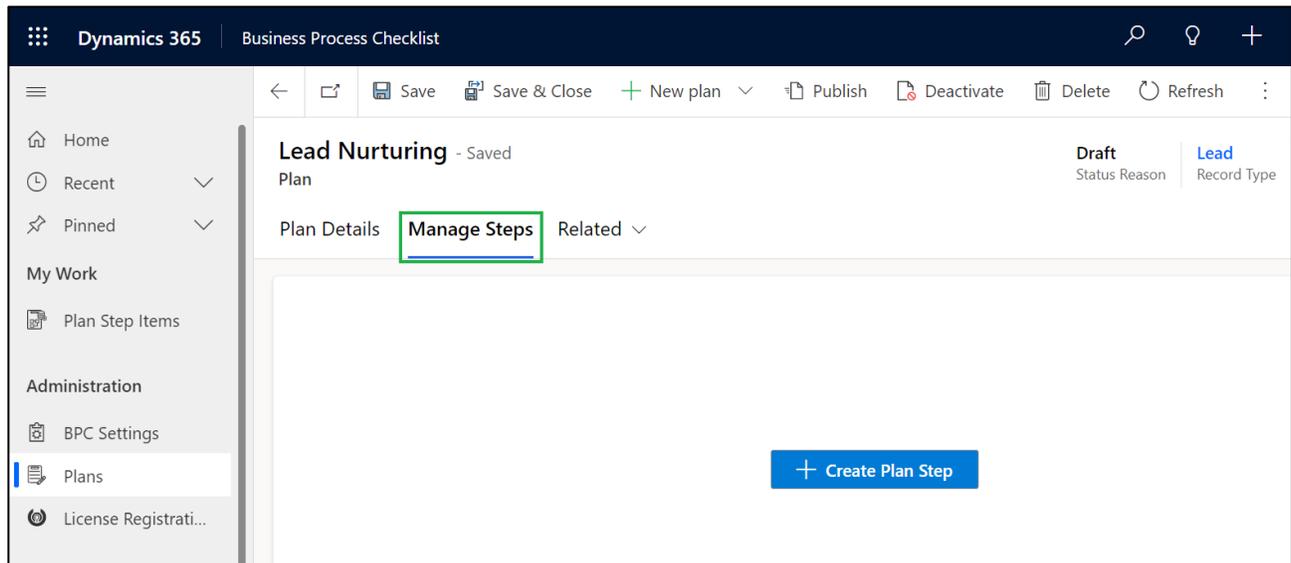
### Plan Steps

Plan steps are tasks that are needed to be performed to carry out a plan. These plan steps consist of multiple activities called "Plan Step Actions," which define how to effectively perform a certain task in a plan.

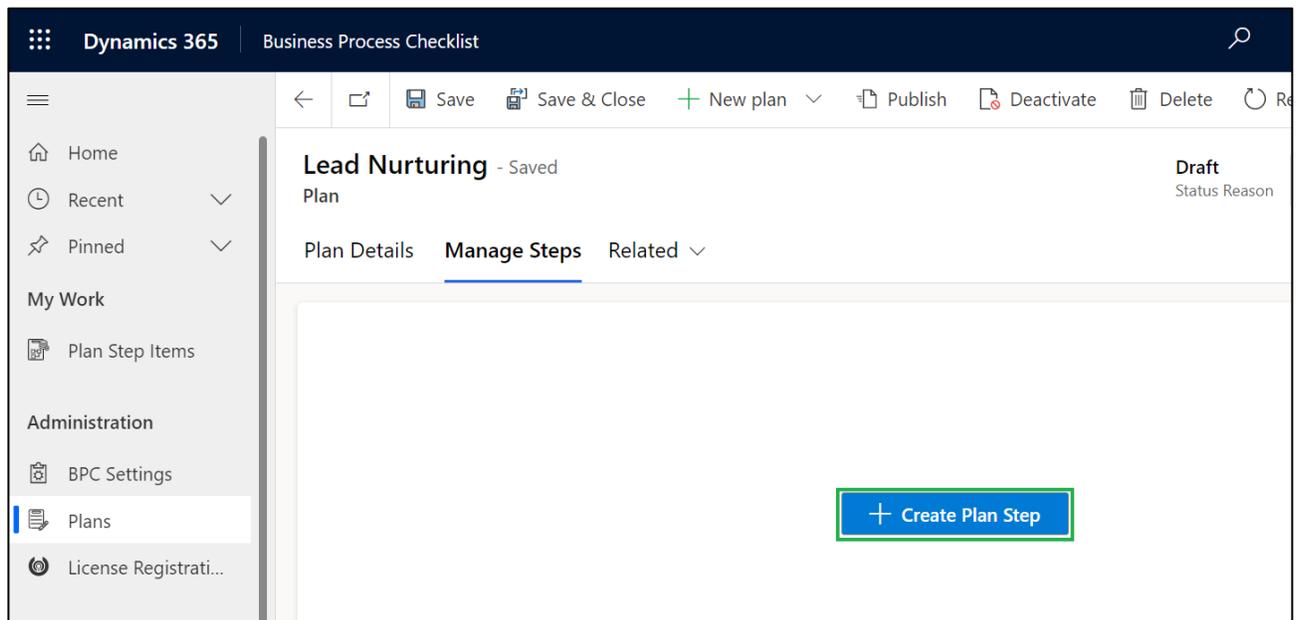
Plan steps help managers define what a task is, why it needs to be performed, and how to perform it.

To create **Plan steps**, follow the steps given below:

- Once the plan is created, navigate to **Manage Steps**.



- Click on the **Create Plan Step** button.



- This will open a **'Quick Create Form: Plan Step'**, where we need to fill in the details.
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
  - **Add a waiting period for this step (Optional):** A waiting period can be added to define when the plan step should be performed. Once the waiting period is over the plan step actions within the plan step can be performed to eventually complete the plan step. For example, If there is a step in the process to send a product introduction email and the waiting period for it is set to 1 day, then the actual email action within the plan step can only be performed after the waiting period ends, i.e., after 1 day.
    - **Days:** Add the desired waiting period for this step to be performed after '**X**' Days.

## Business Process Checklist – User Manual

- **Hours:** Add the desired waiting period for this step to be performed after '**X**' Hours.

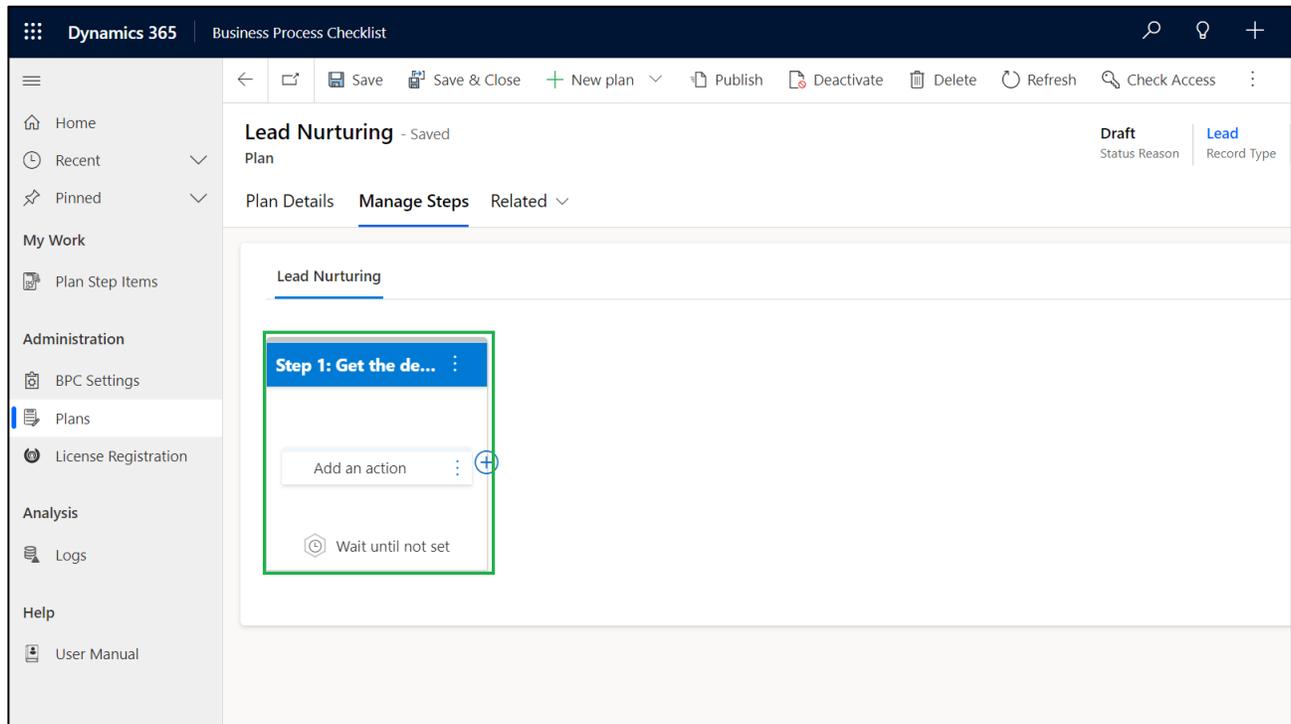
The screenshot shows the Dynamics 365 Business Process Checklist interface. A 'Quick Create: Plan Step' dialog box is open over a 'Lead Nurturing' plan. The dialog has a title bar with a close button. Below the title bar, there are sections for 'Details for plan step' and 'Add waiting period for this step'. The 'Details for plan step' section has two fields: 'Name' (with a red asterisk) and 'Description'. The 'Add waiting period for this step' section has two fields: 'Days' and 'Hours', both with a blue asterisk and a value of 0. At the bottom right of the dialog, there are two buttons: 'Save and Close' (highlighted with a blue border) and 'Cancel'.

- Once the required fields are filled, click on '**Save and Close**'.

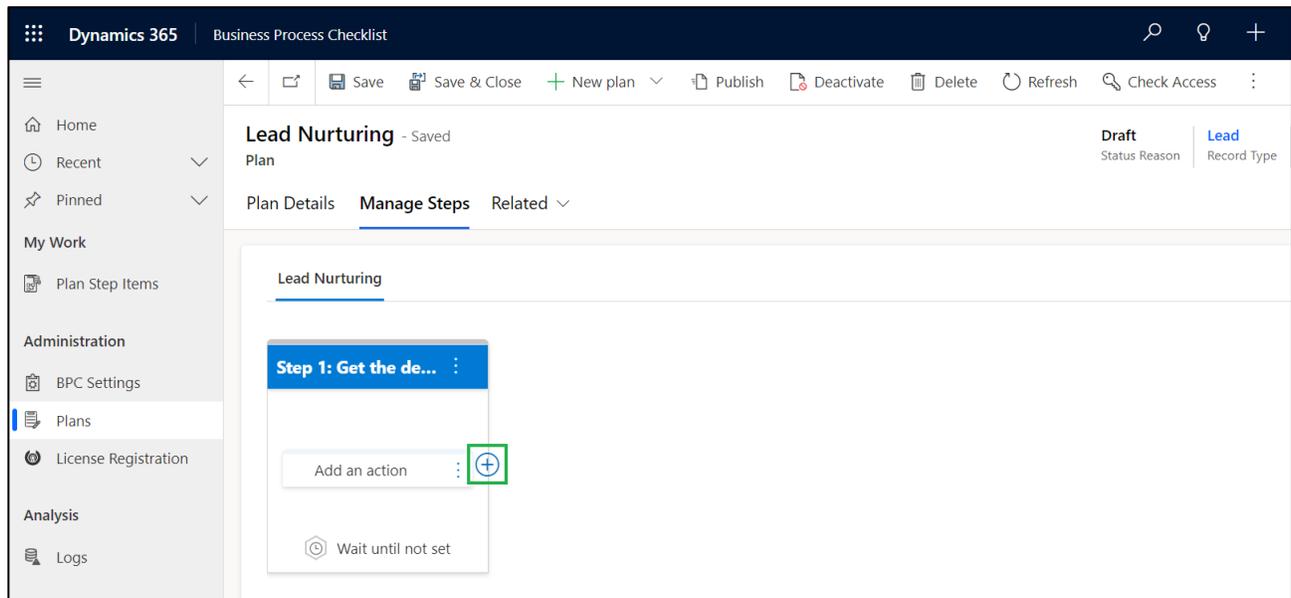
The screenshot shows the Dynamics 365 Business Process Checklist interface. A 'Quick Create: Plan Step' dialog box is open over a 'Lead Nurturing' plan. The dialog has a title bar with a close button. Below the title bar, there are sections for 'Details for plan step' and 'Add waiting period for this step'. The 'Details for plan step' section has two fields: 'Name' (with a red asterisk) and 'Description'. The 'Name' field is filled with 'Get the details for lead' and the 'Description' field is filled with 'This plan step is been created for getting the details for lead'. The 'Add waiting period for this step' section has two fields: 'Days' and 'Hours', both with a blue asterisk and a value of 0. At the bottom right of the dialog, there are two buttons: 'Save and Close' (highlighted with a green border) and 'Cancel'.

- Your plan step will be added to the process and appear on Plan Steps.

## Business Process Checklist – User Manual



- Similarly, we can add more steps by clicking on the '+' button, as shown below.



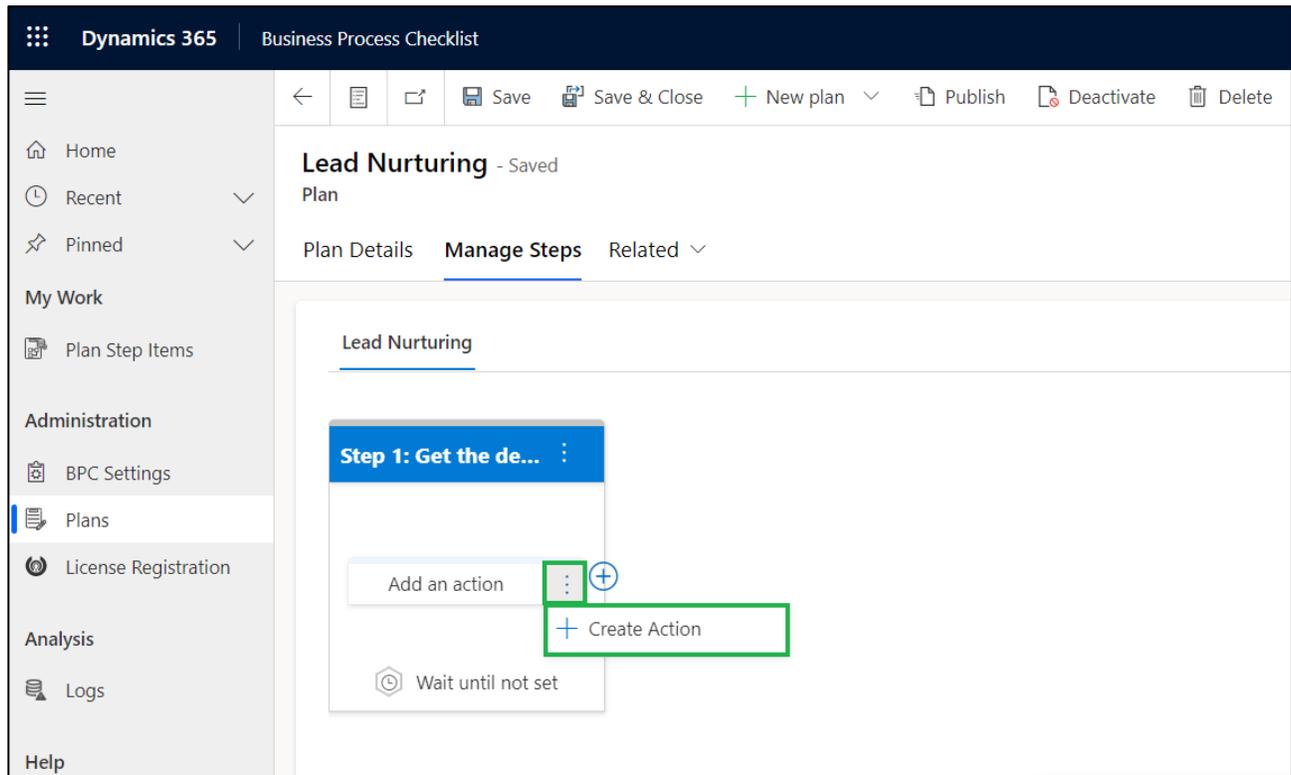
Now that we have created a plan step, let's add plan step actions next.

### Plan Step Action

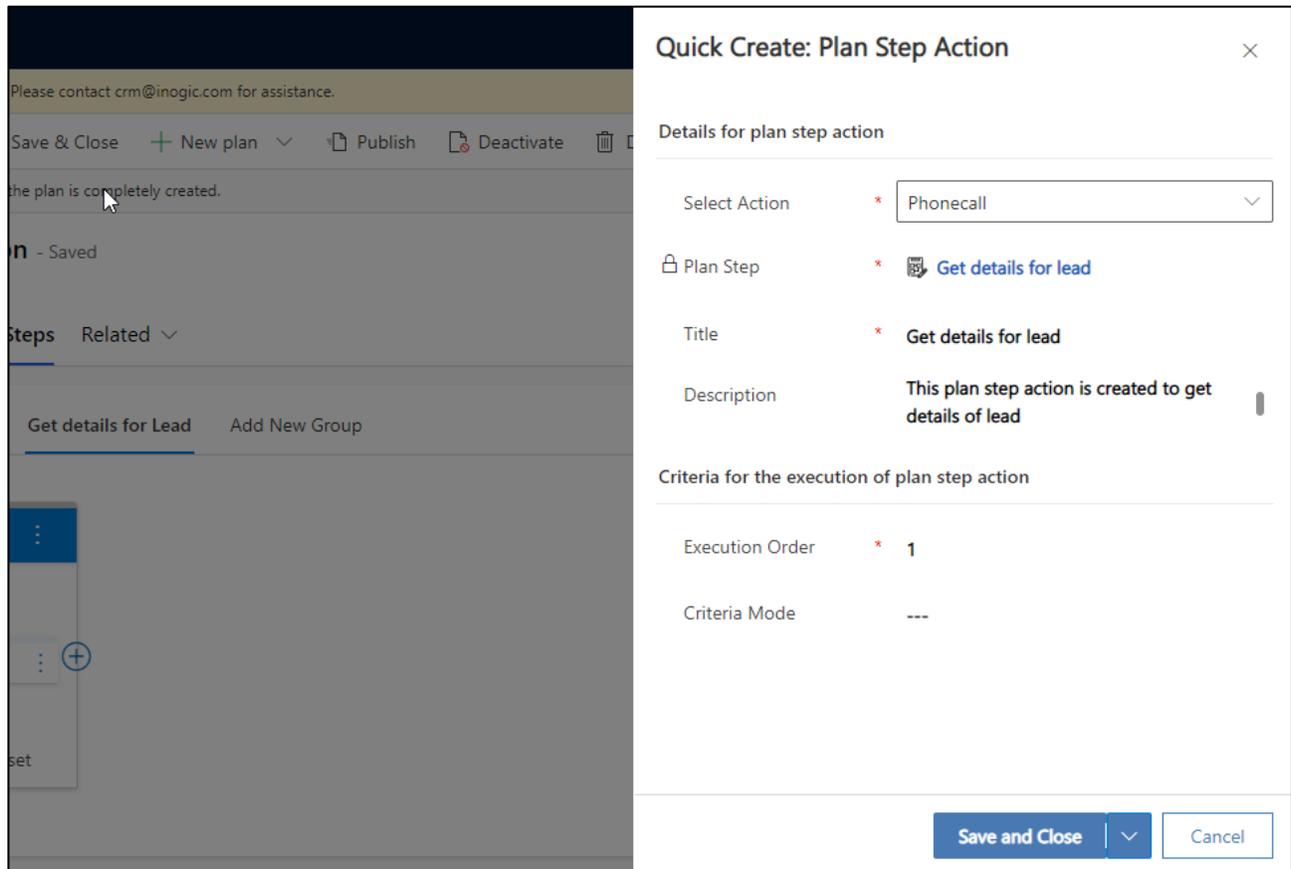
Plan step actions are activities that can be added to a task/plan step to define what activities a salesperson needs to undertake in a specific way to successfully perform a task. For example, in plan step actions, we can define actionable steps like sending a follow-up email or verifying lead details via phone call, etc.

To Add a **Plan Step Action**, follow the steps given below:

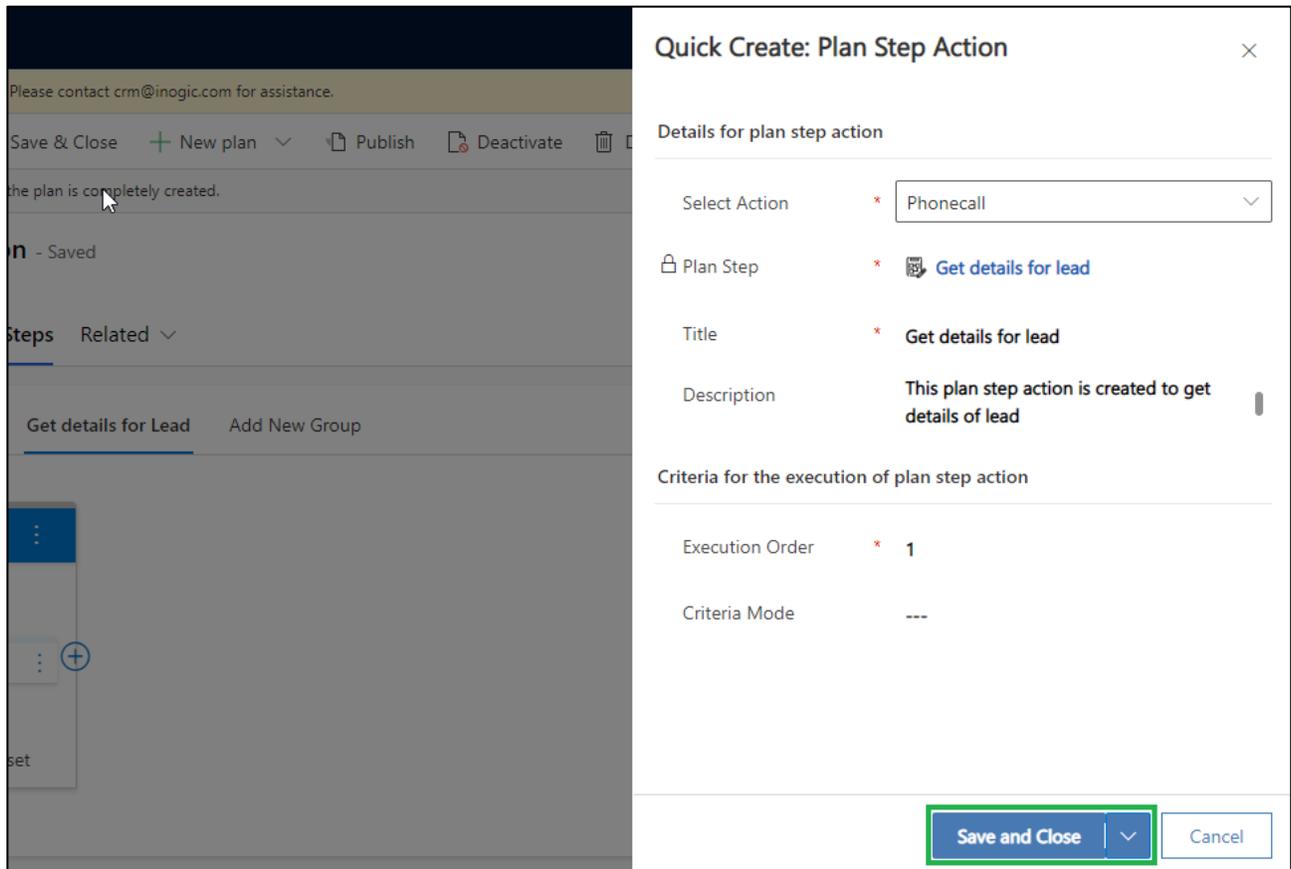
- Click on ellipsis --> '+ Create Action' to Add an action.



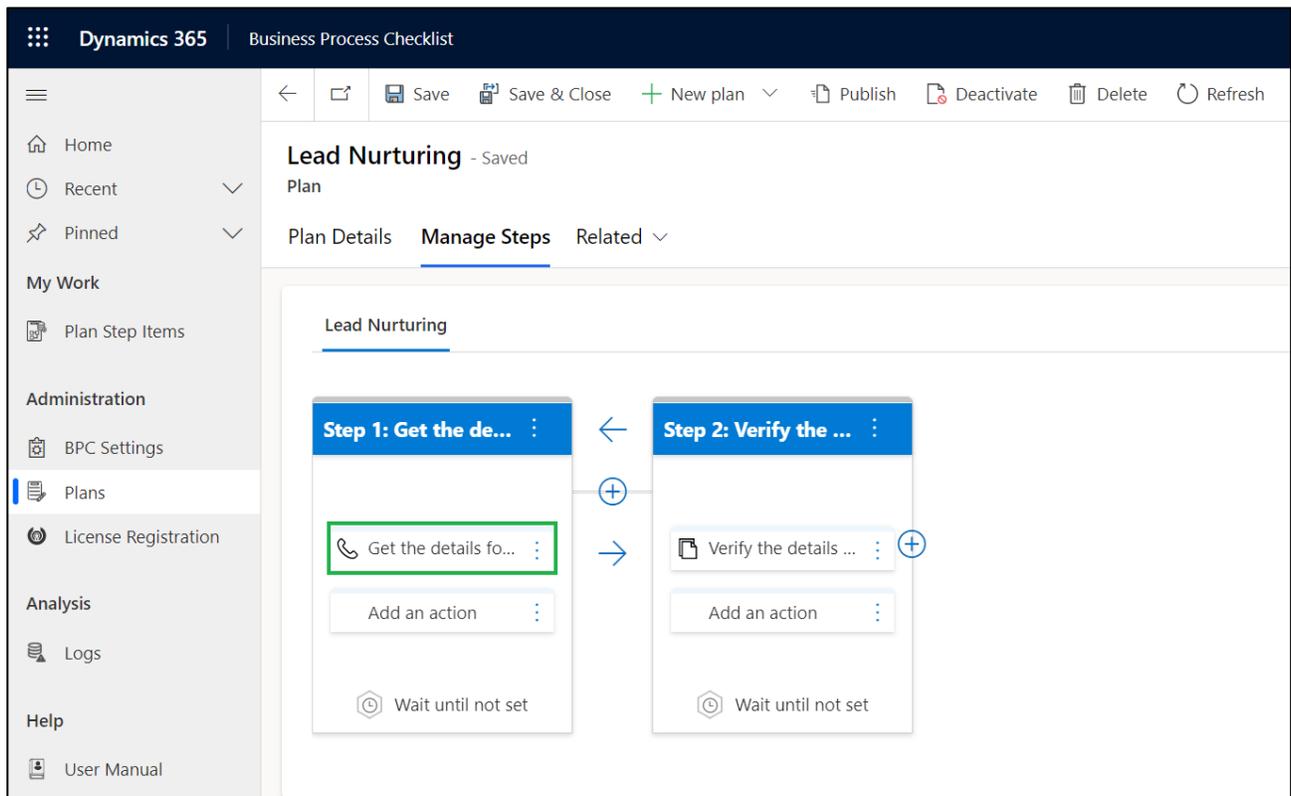
- This will open a **'Quick Create Form: Plan Step Action'**, where we need to fill in the details.
  - **Select Action:** Select an activity (Phone Call, Email, and Tasks) through which you want to carry out a task.
  - **Title:** Your plan step action title is the same as your plan step name, but you can modify the Plan Step Action title as per your requirements.
  - **Description (Optional):** Provide a short description of the plan step action.
  - **Select the Email Template:** You will see this option only if email activity is supported.
    - **Auto Send Email (Optional):** Auto Send Email allows users to automatically send emails for the intended activity. By default, it is set to **No**.
    - **Email Template:** If you want to send a specific type of email automatically to perform a task, you can select an appropriate Email Template from the drop-down menu. If the **Auto-Send Email** is selected as **Yes**, the Email Template field is mandatory to fill.
  - **Set criteria for the execution of Plan Step Action:**
    - **Execution Order:** Enter the execution order for Plan Step Action in which the Plan Step Action will be executed.
    - **Criteria Mode (optional):** Criteria mode defines the criteria of the records on which the Plan Step Action will be applicable and executed. Select either **Simple** or **Advanced**.
      - **Simple:** Here, you can further define and set criteria for records through the view of an entity.
      - **Advanced:** Here, you can further define and set criteria for records through fetch XML.



- Once the required fields are filled, click on **'Save and Close'**.



- Your Plan Step Action will be added to the plan step and will appear on **Plan Step Actions**.



## Business Process Checklist – User Manual

- Similarly, we can add more Plan Step Actions by clicking on the 'Add an action' as shown below.

The screenshot shows the Dynamics 365 Business Process Checklist interface. The top navigation bar includes 'Save', 'Save & Close', 'New plan', 'Publish', 'Deactivate', 'Delete', and 'Refresh'. The main content area displays a 'Lead Nurturing' plan with two steps: 'Step 1: Get the de...' and 'Step 2: Verify the ...'. Each step contains an 'Add an action' button, which is highlighted with a green rectangular box. Below the 'Add an action' button in each step is a 'Wait until not set' option. The left sidebar contains navigation options such as 'Home', 'Recent', 'Pinned', 'My Work', 'Administration', 'Analysis', and 'Help'.

- Click on **Publish** to publish the plan.

The screenshot shows the Dynamics 365 Business Process Checklist interface, similar to the previous one, but with the 'Publish' button in the top navigation bar highlighted with a green rectangular box. The main content area displays the same 'Lead Nurturing' plan with two steps. The status of the plan is shown as 'Draft' in the top right corner. The left sidebar and navigation bar are consistent with the previous screenshot.

**Note: At least one plan step and one plan step action should be added to publish a plan.**

In this way, **Process-Type plan** can be created with the plan steps and plan step actions.

This is the type of plan you need to create when you need the tasks to be executed in a predefined order.

### Checklist-Type plan:

To create plans where the tasks of the plan can be performed independently regardless of the set order, you need to create a **Checklist-Type** plan. The checklist is a type of plan where you can proceed to the next task before completing the current one.

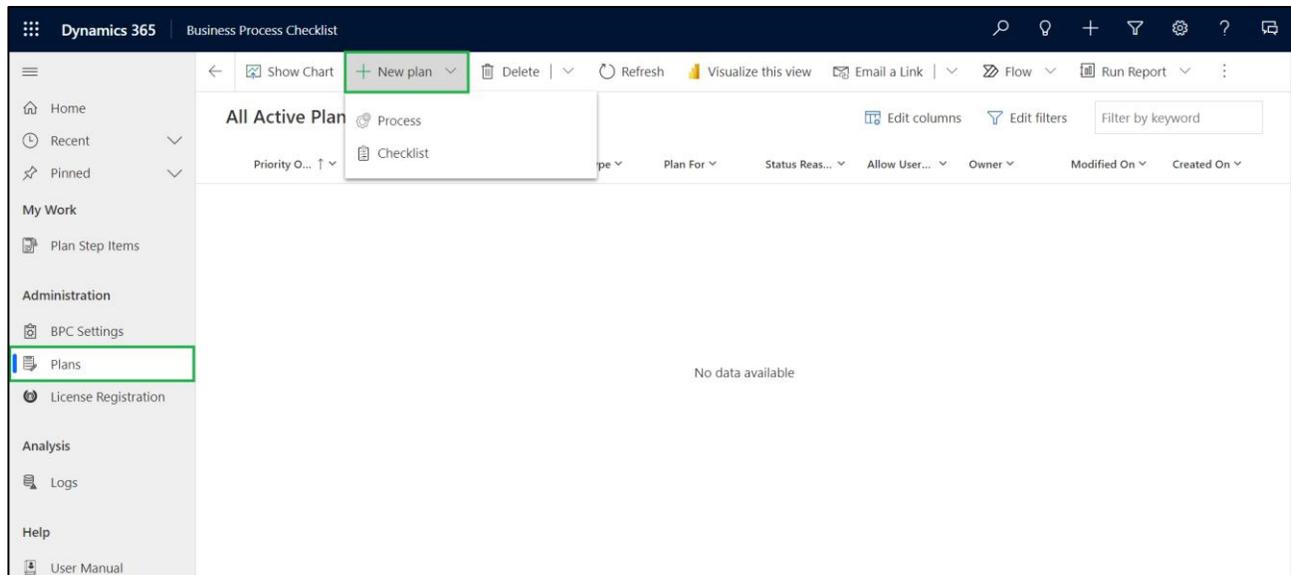
This proves useful for creating flexible plans where your salesperson can perform tasks based on their requirements of the business process, irrespective of the order of tasks set in the plan.

Below are the steps for creating a Checklist-Type plan:

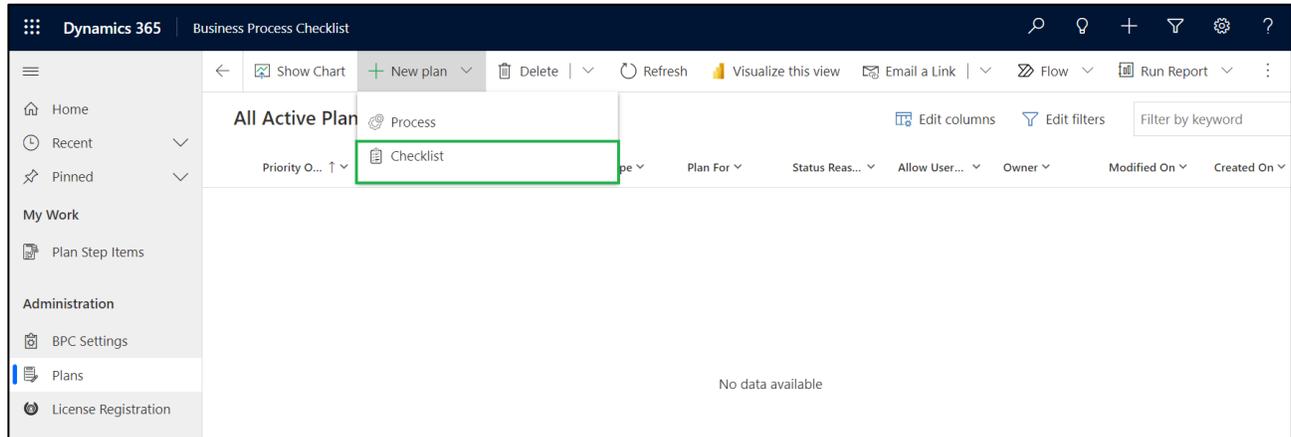
### Plan

To create a Checklist-Type Plan, you need to create a plan first. Plans consist of multiple tasks/plan steps that are needed to be performed to complete a business process successfully.

- Navigate to **Business Process Checklist App --> Plans --> New Plan.**

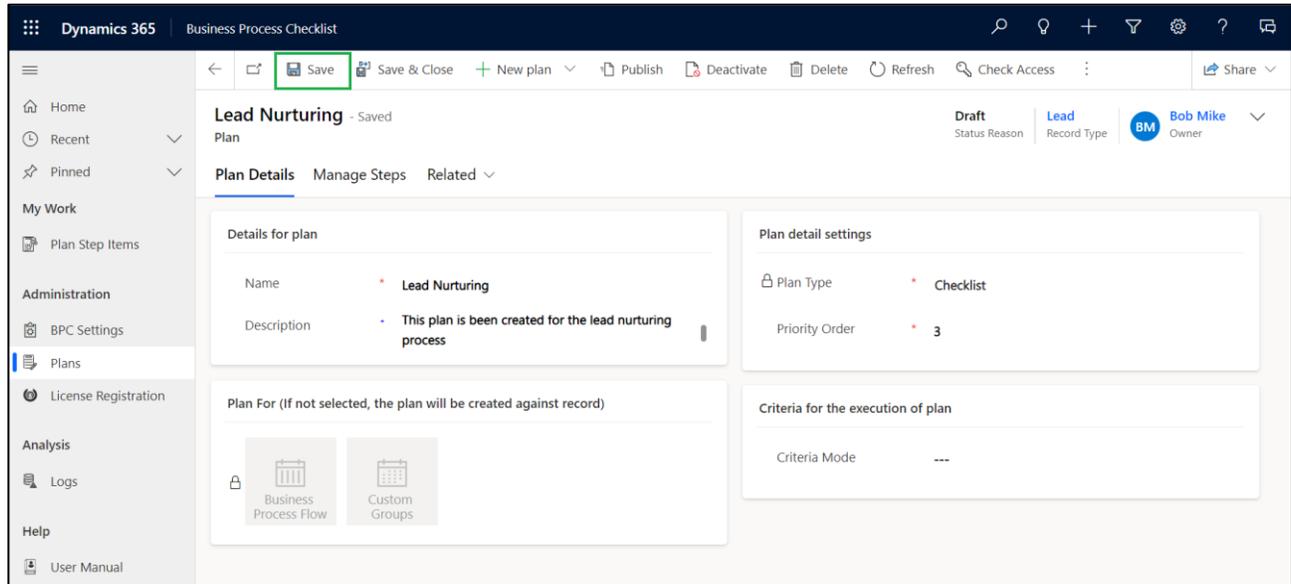


- Click on the **'New plan'** button and select **Checklist**.

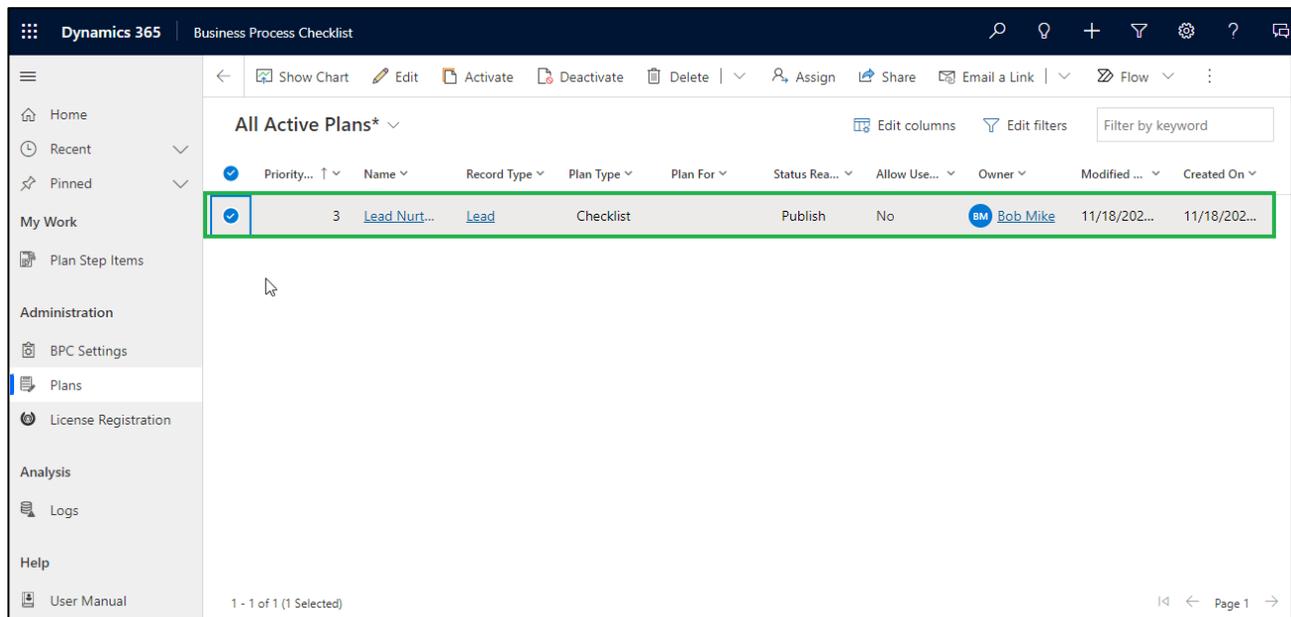


- This will open a 'New Plan', page where you need to fill in the details.
  - **Name:** Provide a unique name for the plan.
  - **Description:** Provide a short description of the plan.
  - **Record Type:** Select the **Record Type** for which the plan will be created. (E.g. Lead, Opportunity, Case, or Custom record type etc.)
  - **Plan Type:** Select Plan Type as **Checklist**.
  - **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.
  - **Set criteria for the execution of the plan (Optional):** Set the criteria against the plan (the plan will automatically attach against those for which the criteria match). Select either **Simple** or **Advanced**.
    - **Simple:** Execute plans based on the conditions defined in view of an entity.
    - **Advanced:** Execute plans based on filter criteria or conditions (conditions defined in Fetch XML).
  - **Plan for (Optional):** Users can create plans for **Business Process Flow** or **Custom Groups**. (If neither business process nor custom groups are selected, then the plan will be automatically created for the record type selected.)
    - **Business Process Flow:** Select **Business Process Flow** to create a Checklist-Type plan for Custom or OOB [Business Process Flows](#).
    - **Custom Groups:** Select **Custom Groups** to create a Checklist-Type plan for [Custom Groups](#).
- Once the required fields are filled, click on 'Save'.

## Business Process Checklist – User Manual



- The new plan will be created and can be seen on **Plans**.



Now that we have created a plan, let's add plan steps to the plan.

### Plan Steps

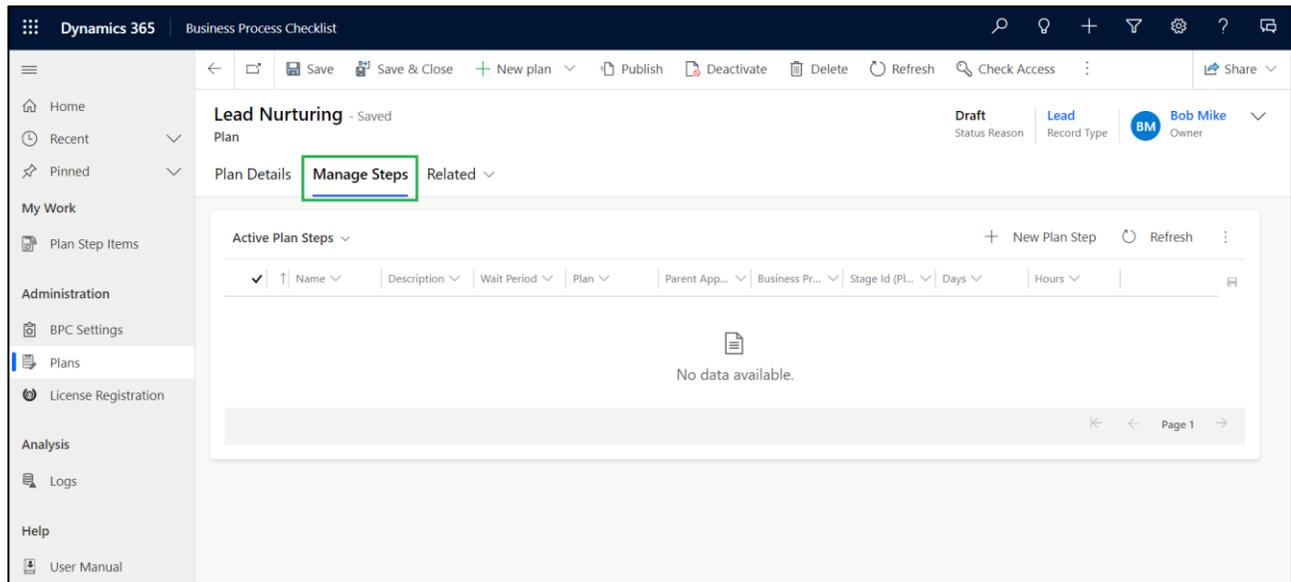
Plan steps are tasks that are needed to be performed to carry out a plan effectively. There are no plan step actions/activities to perform under tasks/plan steps in a Checklist-Type plan.

In a Checklist-Type plan, the plan steps help managers define what a task is and why it needs to be performed.

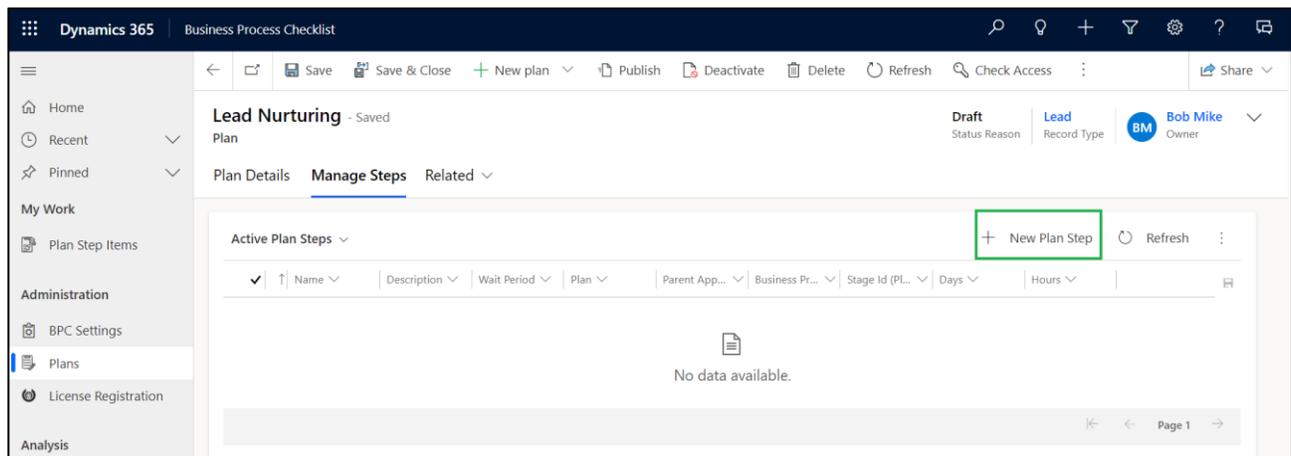
To create **Plan Steps**, follow the steps given below:

## Business Process Checklist – User Manual

- Once the plan is created, navigate to **Manage Steps**.

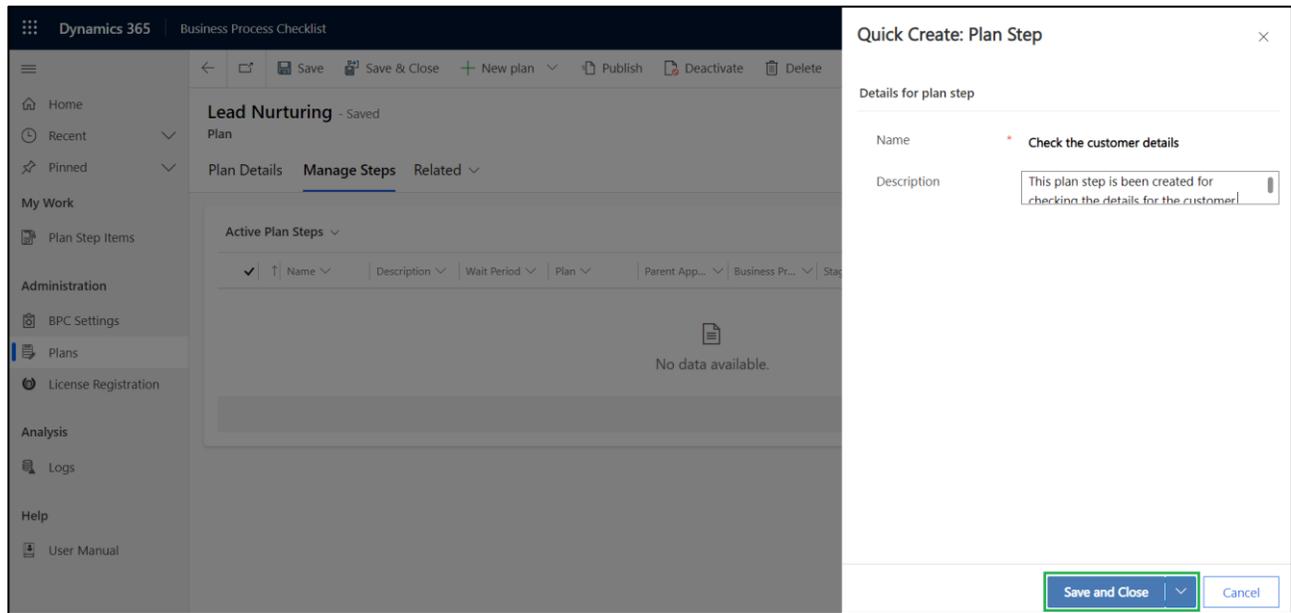


- Click on the **New Plan Step** button.

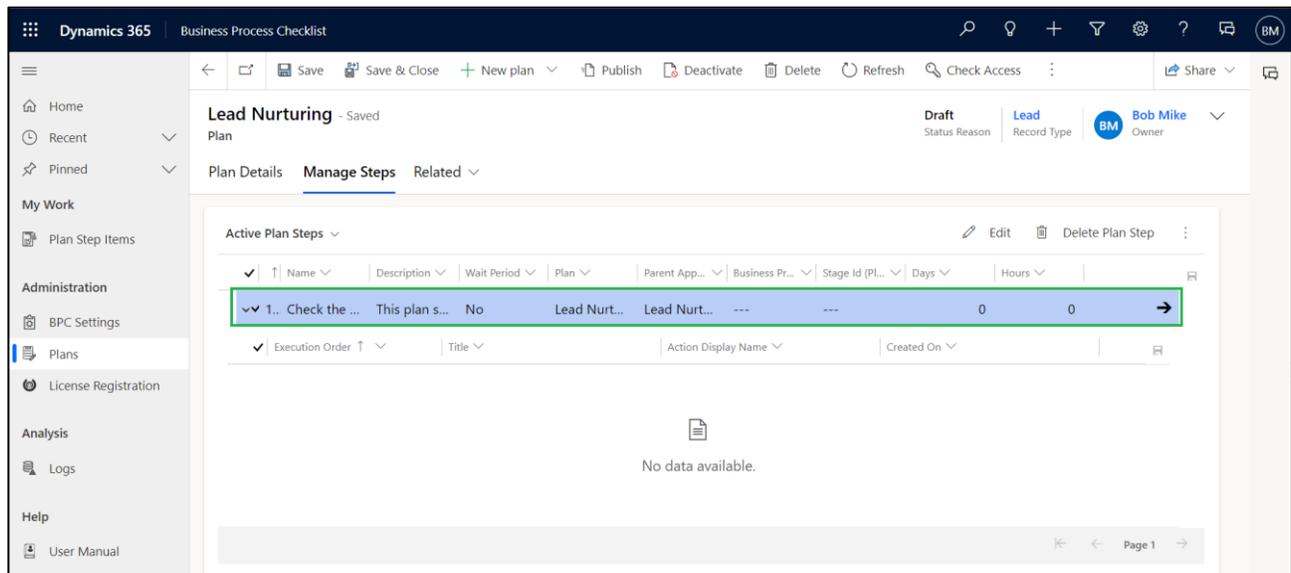


- This will open the **'Quick Create Form: Plan Step'**, where we need to fill in the details.
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description:** Provide a short description of the Plan Step.
- Once the required fields are filled, click on **'Save and Close'**.

## Business Process Checklist – User Manual

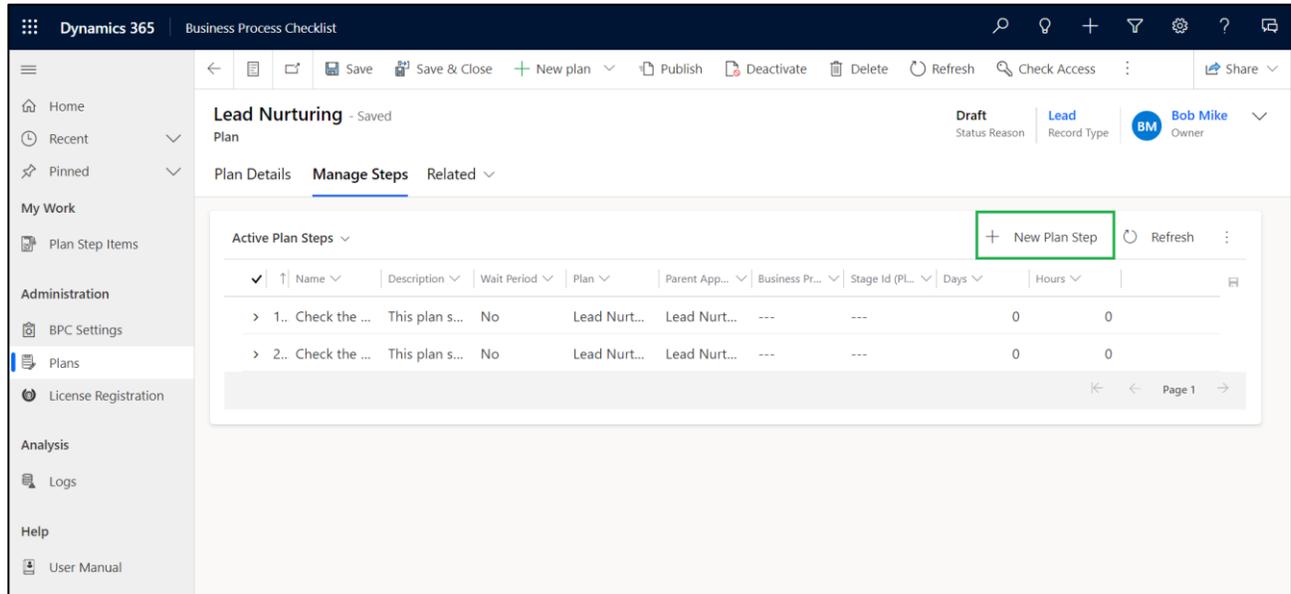


- Your plan step will be added to the checklist and appear on Plan Steps.



- Similarly, we can add more steps, by clicking on the 'New Plan Step' button, as shown below.

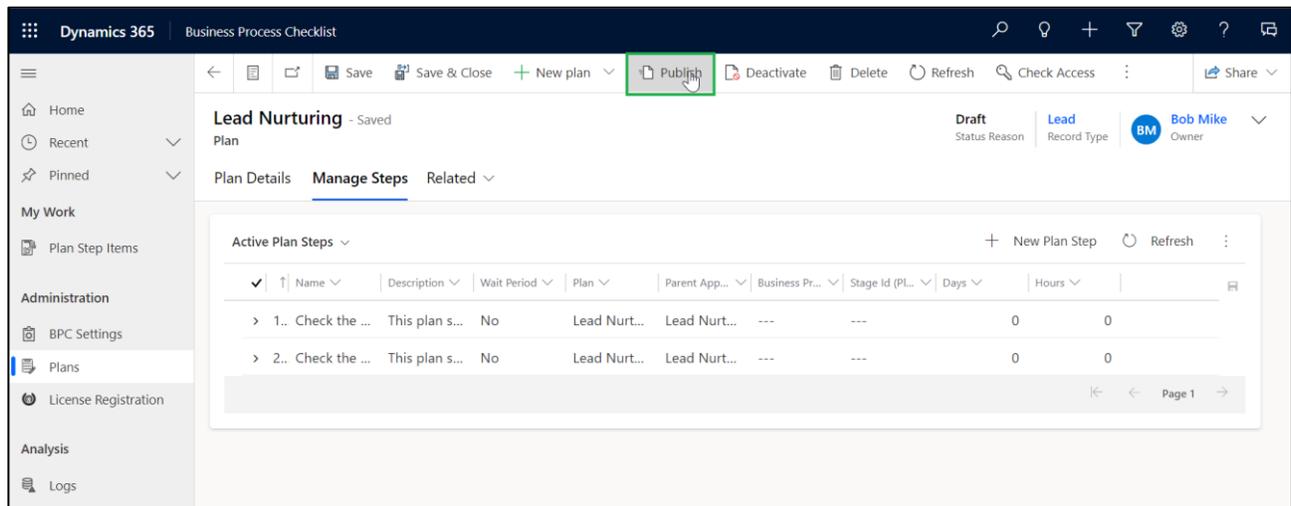
## Business Process Checklist – User Manual



The screenshot shows the Dynamics 365 Business Process Checklist interface. The main area displays a plan titled "Lead Nurturing - Saved" in Draft status. The "Manage Steps" tab is active, showing a table of active plan steps. A green box highlights the "+ New Plan Step" button in the top right corner of the table.

| ✓ | ↑ | Name              | Description    | Wait Period | Plan         | Parent App... | Business Pr... | Stage Id (PL... | Days | Hours |   |
|---|---|-------------------|----------------|-------------|--------------|---------------|----------------|-----------------|------|-------|---|
| > |   | 1.. Check the ... | This plan s... | No          | Lead Nurt... | Lead Nurt...  | ---            | ---             |      | 0     | 0 |
| > |   | 2.. Check the ... | This plan s... | No          | Lead Nurt... | Lead Nurt...  | ---            | ---             |      | 0     | 0 |

- Click on **Publish** to publish the plan.



The screenshot shows the Dynamics 365 Business Process Checklist interface. The main area displays the same "Lead Nurturing - Saved" plan in Draft status. A green box highlights the "Publish" button in the top toolbar.

**Note:** At least one plan step should be added to publish a Checklist-Type plan.

In this way, a **Checklist-Type** plan can be created with the plan steps.

This is the type of plan you need to create when you need the tasks to be executed independently.

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### Create Plan for Business Process Flow

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Business Process Flow provides various stages for users to follow while going through a business process.

When using Business Process Flow, users can fill in the various fields present on the stages to complete a business process, helping managers guide their users, but by creating plans for Business Process Flow, managers can specifically tell the users what tasks they need to perform in order to effectively complete a business process.

You can create plans that can be attached to specific stages of Business Process Flows in Dynamics 365 CRM. For example, if a user wants to create a plan to connect to the **Qualify Stage of Lead to Opportunity Sales Process** to setting up the best practices for **qualifying a lead in the Lead to Opportunity Sales Process**. In order to achieve this, the user has to follow the steps given below:

You can create both **Process** and **Checklist-Type** plans for Business Process Flows:

- **Process-Type plan for Business Process Flow:** In a Process-Type plan for Business Process Flow, tasks can only be performed in a pre-defined order.
- **Checklist-Type Plan for Business Process Flow:** In a Checklist-Type plan for Business Process Flow, tasks can be performed regardless of the set order.

### Process-Type plan for Business Process Flow:

Sometimes, users need to have a plan for Business Process Flow where order of tasks in the plan matters to complete a business process effectively, in this case manager can create a Process-Type plan for Business Process Flow.

This is useful for creating plans for Business Process Flow where you want your salesperson to follow the guidelines in a predefined order and not randomly.

To create a Process-Type plan for Business Process Flow, follow the steps given below:

- **Fill in the following plan details:**
  - **Name:** Provide a unique name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Plan Type:** Select Plan Type as **Process**.
  - **Record Type:** Select the **Record Type** for which the plan will be created. (E.g. Lead, Opportunity, Case, or Custom record type etc.)
  - **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.
  - **Set criteria for the execution of the Plan (Optional):** Set the criteria against the plan (the plan will automatically attach against those for which the criteria match). Select either **Simple** or **Advanced**.
    - **Simple:** Execute plans based on the conditions defined in view of an entity.
    - **Advanced:** Execute plans based on filter criteria or conditions (conditions defined in Fetch XML).
  - Select **'Business Process Flow'**.
  - Select Business Process Flow to which the plan will be attached.

## Business Process Checklist – User Manual

The screenshot shows the 'New Plan' form in Dynamics 365. The form is titled 'New Plan - Unsaved' and has a status of 'Draft'. The 'Plan Details' section is active, showing the following fields:

- Name: \* Lead Nurturing
- Description: \* This plan is been created for lead nurturing for Business Process Checklist
- Plan Type: \* Process
- Priority Order: \* 2
- Criteria Mode: ---

The 'Plan For' section shows 'Business Process Flow' selected. The 'Existing plan modify' section shows 'Lead to Opportunity Sales Process' selected in a dropdown menu.

- Once the required fields are filled, click on **'Save'**.

The screenshot shows the 'Lead Nurturing' form in Dynamics 365, now saved. The 'Save' button in the top navigation bar is highlighted with a green box. The form is titled 'Lead Nurturing - Saved' and has a status of 'Draft'. The 'Plan Details' section is active, showing the following fields:

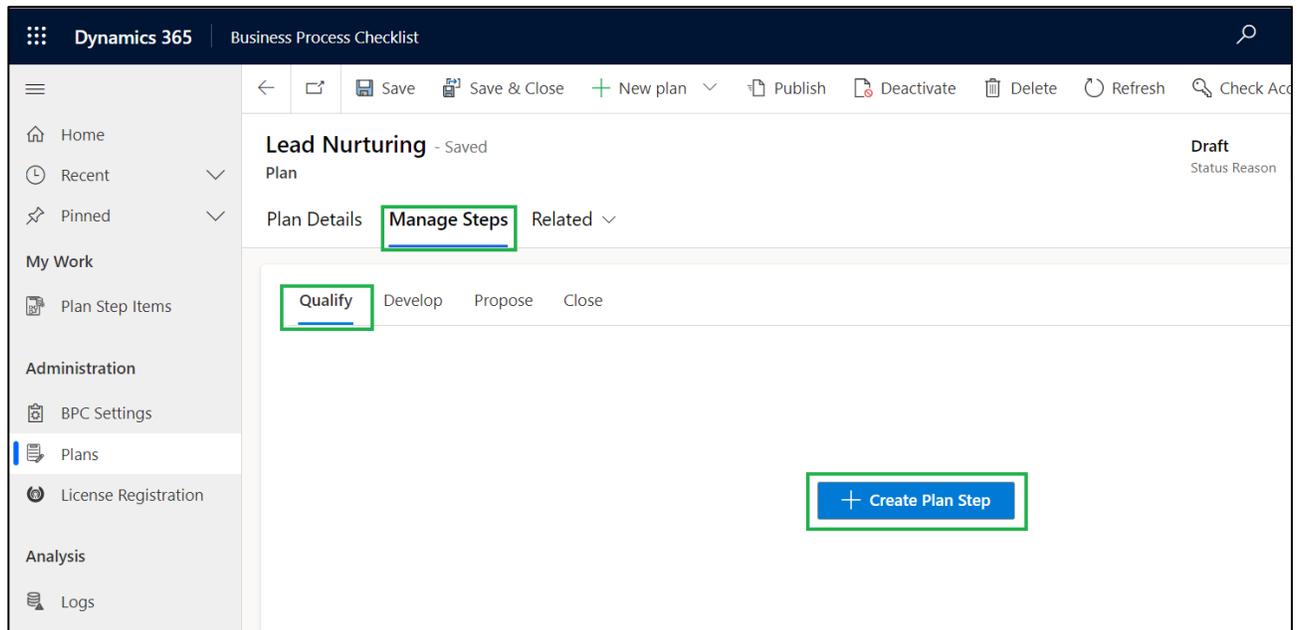
- Name: \* Lead Nurturing
- Description: \* This plan is been created for lead nurturing for Business Process Checklist
- Plan Type: \* Process
- Priority Order: \* 2
- Criteria Mode: ---

The 'Plan For' section shows 'Business Process Flow' selected. The 'Existing plan modify' section shows 'Lead to Opportunity Sales Process' selected in a dropdown menu.

Your Process-Type plan for Business Process Flow is created and now you can add the Plan Steps inside the various stages of the selected Business Process Flow. To do the same, follow the steps given below:

- Navigate to **Manage Steps**.
- Here, as per the Business Process Flow selected by the manager, various stages of the selected Business Process Flow will be displayed. The manager now selects the desired stages and creates the plan step and plan step action inside the stages.

- **For example:** Here we have selected the Business process flow of the **Lead to Opportunity Sales Process**, and the stages are Qualify, Develop, Propose, and Close of the **Lead to Opportunity Sales Process** which will automatically be displayed as shown below.
- Now, select the required BPF stage, for example, select the **Qualify** stage.
- Click on the '**Create Plan Step**' Button.



- This will open the '**Quick Create Form: Plan Step**', where we need to fill in the details.
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
  - **Add a waiting period for this step (Optional):** A waiting period can be added to define when the plan step should be performed. Once the waiting period is over the plan step actions within the plan step can be performed to eventually complete the plan step. For example, If there is a step in the process to send a product introduction email and the waiting period for it is set to 1 day, then the actual email action within the plan step can only be performed after the waiting period ends, i.e., after 1 day.
    - **Days:** Add the desired waiting period for this step to be performed after '**X**' Days.
    - **Hours:** Add the desired waiting period for this step to be performed after '**X**' Hours.

## Business Process Checklist – User Manual

The screenshot shows the Dynamics 365 Business Process Checklist interface. The main window displays the 'Lead Nurturing' plan with tabs for 'Plan Details', 'Manage Steps', and 'Related'. The 'Manage Steps' tab is active, showing a 'Qualify' step. A '+ Create Plan Step' button is visible. A 'Quick Create: Plan Step' dialog box is open, showing the following details:

- Name:** Check the existing contact
- Description:** This plan step is been created for the qualify stage
- Add waiting period for this step:**
  - Days: 0
  - Hours: 0

The 'Save and Close' button is highlighted with a green box.

- Once the required fields are filled, click on **'Save and Close'**.

The screenshot shows the Dynamics 365 Business Process Checklist interface. The main window displays the 'Lead Nurturing' plan with tabs for 'Plan Details', 'Manage Steps', and 'Related'. The 'Manage Steps' tab is active, showing a 'Qualify' step. A '+ Create Plan Step' button is visible. A 'Quick Create: Plan Step' dialog box is open, showing the following details:

- Name:** Check the existing contact
- Description:** This plan step is been created for the qualify stage
- Add waiting period for this step:**
  - Days: 0
  - Hours: 0

The 'Save and Close' button is highlighted with a green box.

- Your plan step will be added to the process and will appear on **plan steps**.

## Business Process Checklist – User Manual

The screenshot shows the Dynamics 365 Business Process Checklist interface. The top navigation bar includes 'Dynamics 365' and 'Business Process Checklist'. Below the navigation bar, there are icons for 'Save', 'Save & Close', 'New plan', 'Publish', 'Deactivate', 'Delete', and 'Refresh'. The main content area displays a 'Lead Nurturing' plan with tabs for 'Plan Details', 'Manage Steps', and 'Related'. The 'Manage Steps' tab is active, showing a 'Qualify' stage with a 'Step 1: Check the ...' step. A green box highlights the 'Add an action' button and the 'Wait until not set' action within this step.

- And now you can add the actions inside the plan step created for the selected stage.

The screenshot shows the Dynamics 365 Business Process Checklist interface with two steps in a plan. The top navigation bar and icons are the same as in the previous screenshot. The main content area displays the 'Lead Nurturing' plan with tabs for 'Plan Details', 'Manage Steps', and 'Related'. The 'Manage Steps' tab is active, showing a 'Qualify' stage with two steps: 'Step 1: Check the ...' and 'Step 2: Account n...'. A green box highlights the 'Add an action' button and the 'Wait until not set' action within Step 1. A blue box highlights the 'Add an action' button and the 'Wait until not set' action within Step 2. A plus sign icon is visible next to the 'Add an action' button in Step 2, indicating that actions can be added to this step.

- To create Plan Step Actions, [click here](#).

In this way, Process-Type plans for Business Process Flow can be created with plan steps and plan step actions.

You can also create a Checklist-Type plan for Business Process Flow.

### Checklist-Type Plan for Business Process Flow:

To create plans for Business Process Flow where the tasks of the plan can be performed independently regardless of the set order, you need to create a **Checklist-Type** plan for Business Process Flow where you can proceed to the next task before completing the current one.

This proves useful for creating flexible plans for Business Process Flow where your salesperson can perform tasks based on their requirements of the business process, irrespective of the order of tasks set in the plan.

To create a Checklist-Type plan for Business Process Flow, follow the steps given below:

- **Fill in the following plan details:**
  - **Name:** Provide a unique name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Plan Type:** Select Plan Type as **Checklist**.
  - **Record Type:** Select the **Record Type** for which the plan will be created. (E.g. Lead, Opportunity, Case, or Custom record type etc.)
  - **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.
  - **Set criteria for the execution of the Plan (Optional):** Set the criteria against the plan (the plan will automatically attach against those for which the criteria match). Select either **Simple** or **Advanced**.
    - **Simple:** Execute plans based on the conditions defined in view of an entity.
    - **Advanced:** Execute plans based on filter criteria or conditions (conditions defined in Fetch XML).
  - Select '**Business Process Flow**'.

## Business Process Checklist – User Manual

The screenshot shows the Dynamics 365 Business Process Checklist interface. The page title is "Lead Nurturing - Saved Plan". The left navigation pane includes Home, Recent, Pinned, My Work (Plan Step Items), Administration (BPC Settings, Plans, License Registration), Analysis (Logs), and Help (User Manual). The main content area is divided into several sections:

- Details for plan:** Name: \* Lead Nurturing; Description: \* This plan is been created for the lead nurturing for Business Process Checklist.
- Plan detail settings:** Plan Type: \* Checklist; Priority Order: \* 4.
- Plan For (If not selected, the plan will be created against record):** This section contains two options: "Business Process Flow" (selected and highlighted with a green box) and "Custom Groups".
- Existing plan modify:** Business Process Flow: \* Lead to Opportunity Sales Process (dropdown menu).
- Criteria for the execution of plan:** Criteria Mode: ---.

- Select Business Process Flow to which the plan will be attached.

This screenshot is identical to the previous one, showing the same Dynamics 365 Business Process Checklist interface. In this view, the "Existing plan modify" section, specifically the dropdown menu showing "Lead to Opportunity Sales Process", is highlighted with a green box.

- Once the required fields are filled, click on 'Save'.

## Business Process Checklist – User Manual

The screenshot shows the Dynamics 365 Business Process Checklist interface. The top navigation bar includes 'Save', 'Save & Close', 'New plan', 'Publish', 'Deactivate', 'Delete', 'Refresh', 'Check Access', 'Assign', and 'Flow'. The main content area is titled 'Lead Nurturing - Saved Plan' and includes tabs for 'Plan Details', 'Manage Plans', and 'Related'. The 'Plan Details' tab is active, showing the following information:

- Details for plan:** Name: Lead Nurturing; Description: This plan is been created for the lead nurturing for Business Process Checklist.
- Plan detail settings:** Plan Type: Checklist; Priority Order: 4.
- Plan For (if not selected, the plan will be created against record):** Business Process Flow and Custom Groups.
- Existing plan modify:** Business Process Flow: Lead to Opportunity Sales Process.

Your Checklist-Type plan for Business Process Flow is created and, now you can add the Plan Steps inside the various stages of the selected Business Process Flow. To do the same, follow the steps given below:

- Navigate to **Manage Steps**.
- Here, as per the Business Process Flow selected by the manager, various stages of the selected Business Process Flow will be displayed. Manager can now select the desired stages and create the actions inside the stages.
- **For example:** here we have selected the Business Process Flow of the **Lead to Opportunity Sales Process**, and the stages (Qualify, Develop, Propose, and Close) of the **Lead to Opportunity Sales Process** will automatically be displayed as shown below.

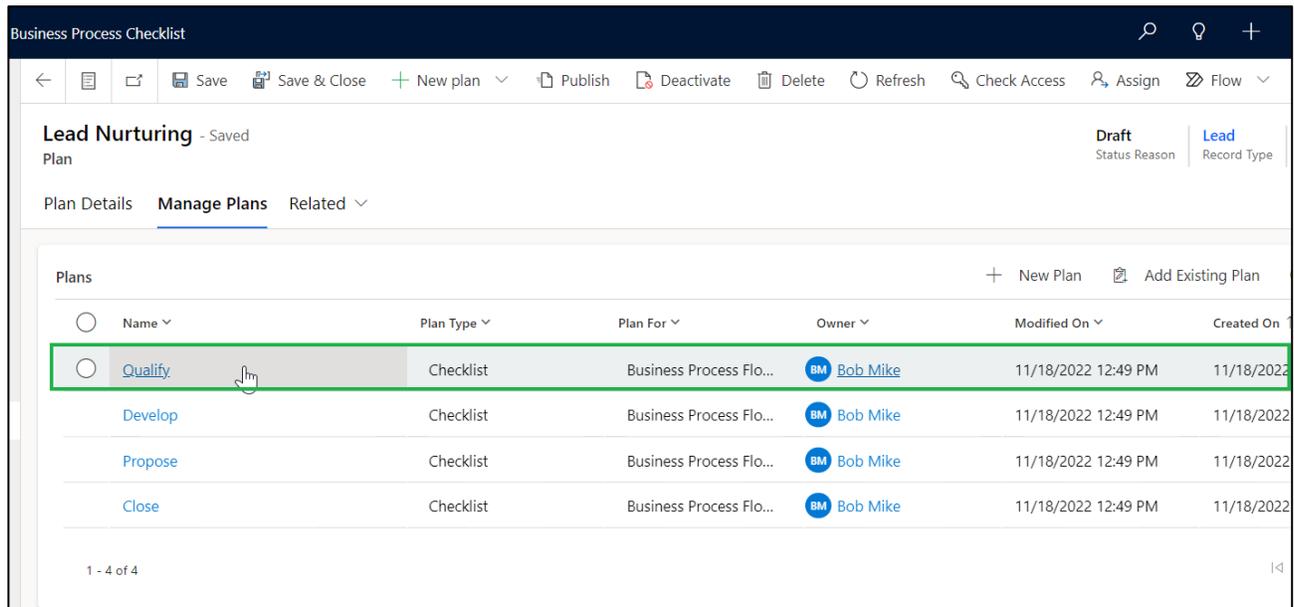
The screenshot shows the Dynamics 365 Business Process Checklist interface with the 'Manage Plans' tab selected. The table below displays the list of plans:

| Name    | Plan Type | Plan For                | Owner       | Modified On         | Created On |
|---------|-----------|-------------------------|-------------|---------------------|------------|
| Qualify | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |
| Develop | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |
| Propose | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |
| Close   | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |

The table shows 4 plans, with the first one being 'Qualify'. The page number '1 - 4 of 4' is visible at the bottom left of the table area.

## Business Process Checklist – User Manual

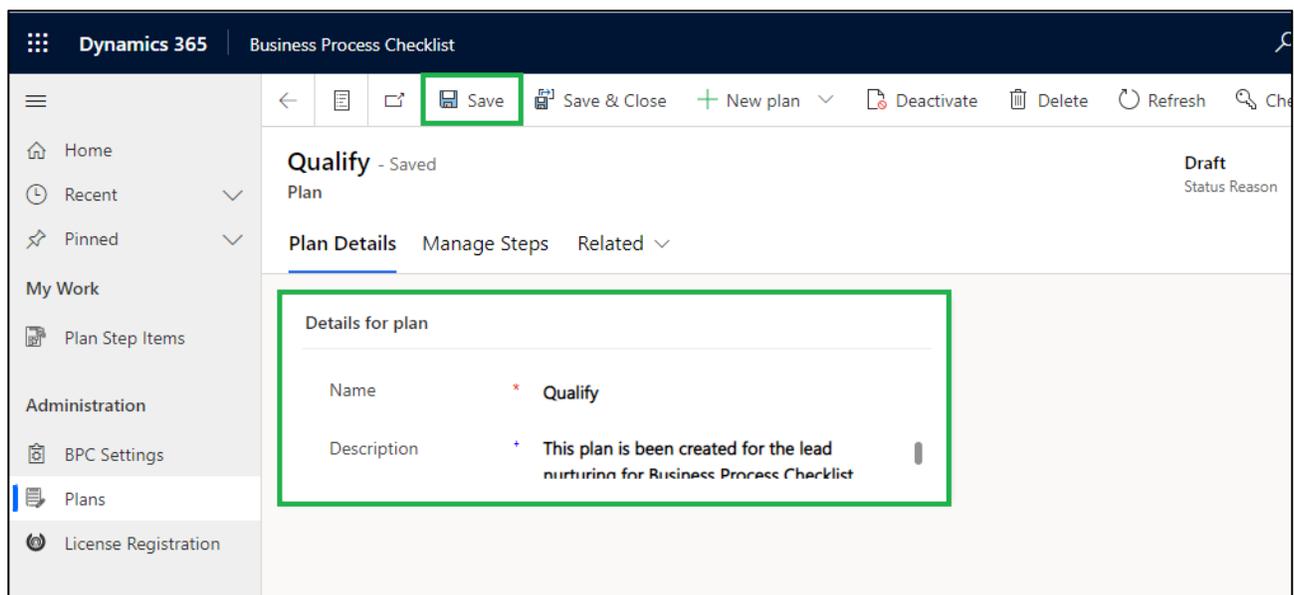
- Now select the required BPF stage. For example, select the **Qualify** stage.



The screenshot shows the 'Business Process Checklist' application interface. At the top, there is a navigation bar with various icons and a search icon. Below the navigation bar, the main header displays 'Lead Nurturing - Saved' and 'Plan'. The 'Manage Plans' tab is active, showing a table of plans. The 'Qualify' plan is highlighted with a green border, indicating it is the selected stage.

| Name    | Plan Type | Plan For                | Owner       | Modified On         | Created On |
|---------|-----------|-------------------------|-------------|---------------------|------------|
| Qualify | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |
| Develop | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |
| Propose | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |
| Close   | Checklist | Business Process Flo... | BM Bob Mike | 11/18/2022 12:49 PM | 11/18/2022 |

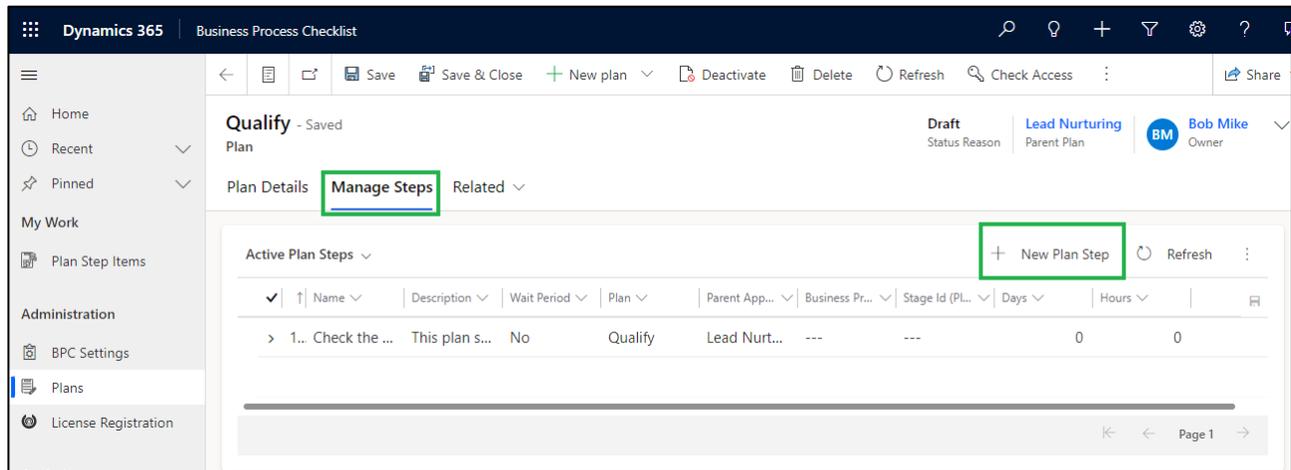
- Fill in the "Child plan" details (Qualify).
  - **Name:** Provide an appropriate name for the Plan.
  - **Description:** Provide a short description of the Plan.
- Once the required fields are filled, click on 'Save'.



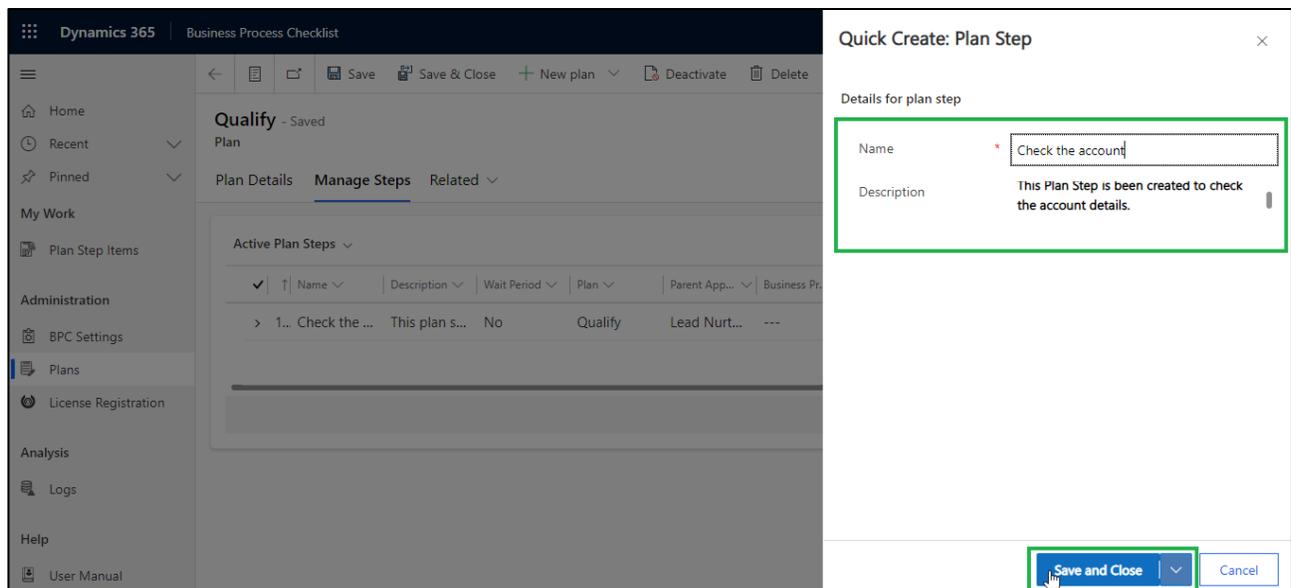
The screenshot shows the 'Business Process Checklist' application interface. The 'Save' button is highlighted with a green box. The 'Qualify' plan details are shown, including the name 'Qualify' and the description 'This plan is been created for the lead nurturing for Business Process Checklist'. The 'Details for plan' section is highlighted with a green box.

- Navigate to **Manage Steps**.
- Click on the 'New Plan step' Button.

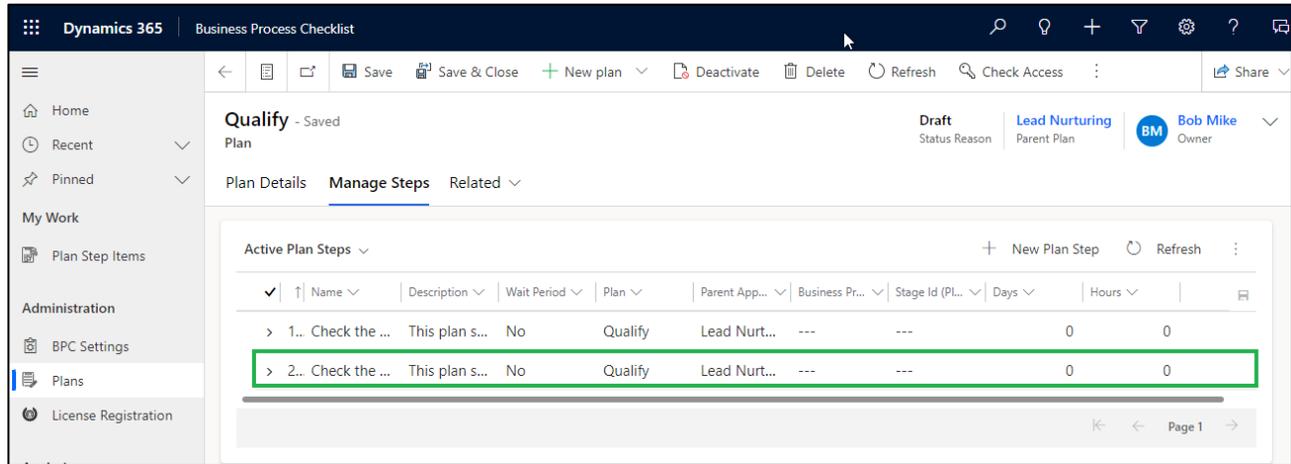
## Business Process Checklist – User Manual



- This will open the **'Quick Create Form: Plan Step'**, where we need to fill in the details.
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
- Once the required fields are filled, click on **'Save and Close'**.



- Your plan step will be added to the process and will appear on **Plan Steps**.



In this way, Checklist-Type plans for Business Process Flow can be created with plan steps.

## Create Plan for Custom Groups

If your organization doesn't use any Business Process Flow, then sales managers can set up plans in custom groups. For example, if you are a manager in a finance company and want to create a plan for loan verification with Plan steps for home verification without using Business Process Flow, then you can create a plan on custom groups using the Business Process Checklist app.

With this feature, you can create both **Process** and **Checklist** - type plans on **Custom Groups**. To do the same, the user has to follow the steps given below:

- **Process-Type plan for Custom Groups:** In a Process-Type plan for Custom groups, tasks can only be performed in a pre-defined order.
- **Checklist-Type Plan for Custom Groups:** In a Checklist-Type plan for Custom Groups, tasks can be performed regardless of the set order.

### Process-Type plan for Custom Groups:

Sometimes, users need to have a plan for Custom Groups where order of tasks in the plan matters to complete a business process effectively, in this case manager can create a Process-Type plan for Business Process Flow.

This is useful for creating plans for Custom Groups where you want your salesperson to follow the guidelines in a predefined order and not randomly.

To create a Process-Type plan for Custom Groups, follow the steps given below:

- **Fill in the following plan details:**
  - **Name:** Provide a unique name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Plan Type:** Select Plan Type as **Process**.
  - **Record Type:** Select the **Record Type** for which the plan will be created. (E.g. Lead, Opportunity, Case, or Custom record type etc.)

## Business Process Checklist – User Manual

- **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.
- **Set criteria for the execution of the Plan (Optional):** Set the criteria against the plan (the plan will automatically attach against those for which the criteria match). Select either **Simple** or **Advanced**.
  - **Simple:** Execute plans based on the conditions defined in view of an entity.
  - **Advanced:** Execute plans based on filter criteria or conditions (conditions defined in Fetch XML).
- Select '**Custom Groups**'.

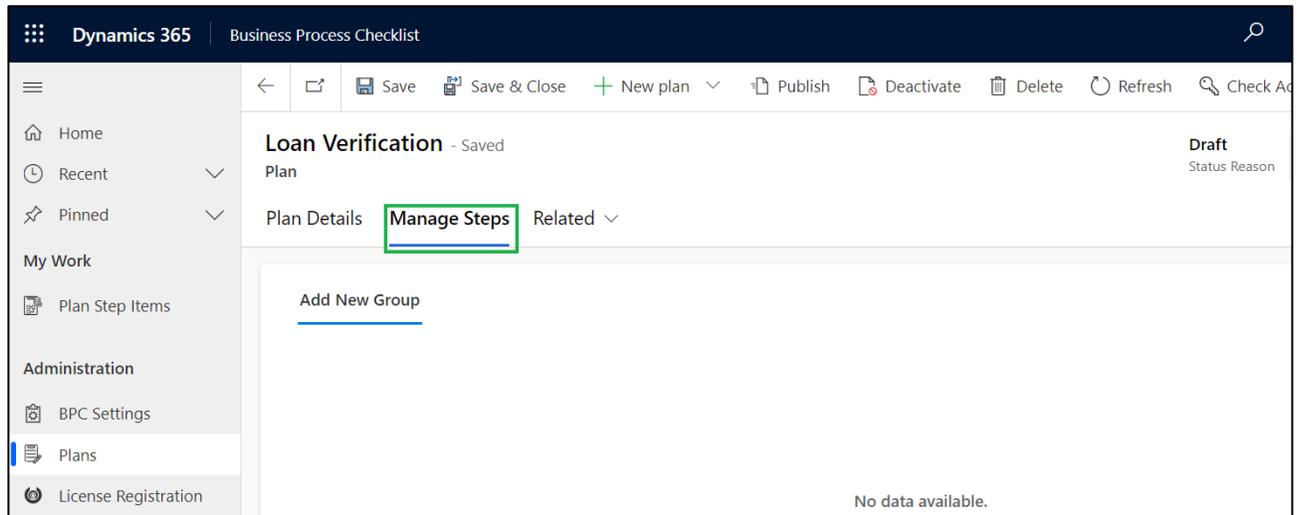
The screenshot shows the Dynamics 365 Business Process Checklist interface. The main area displays the configuration for a plan named 'Loan Verification'. The 'Plan For' section is highlighted with a green box, and the 'Custom Groups' option is selected. The 'Plan detail settings' section shows 'Plan Type' as 'Process' and 'Priority Order' as '1'. The 'Criteria for the execution of plan' section shows 'Criteria Mode' as '---'.

- Once the required fields are filled, click on '**Save**'.

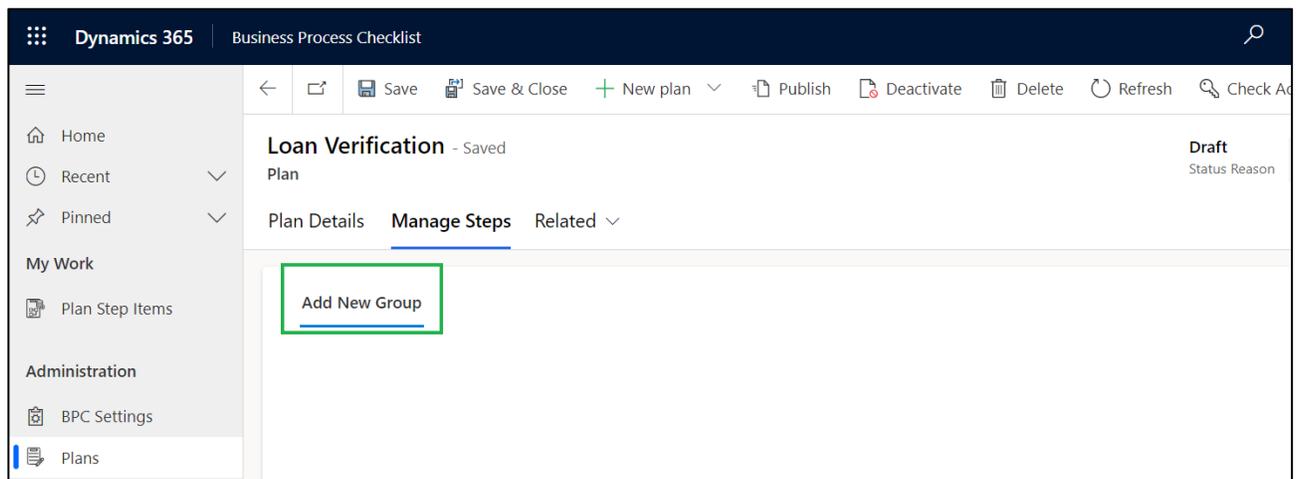
The screenshot shows the Dynamics 365 Business Process Checklist interface. The 'Save' button in the top navigation bar is highlighted with a green box. The main area displays the configuration for a plan named 'Loan Verification'. The 'Plan For' section has 'Custom Groups' selected. The 'Plan detail settings' section shows 'Plan Type' as 'Process' and 'Priority Order' as '1'. The 'Criteria for the execution of plan' section shows 'Criteria Mode' as '---'.

Your Process-Type plan for Custom Groups is created, and now you can add the Plan Steps for the newly created plan. To do the same, follow the steps given below:

- Navigate to **Manage Steps**.

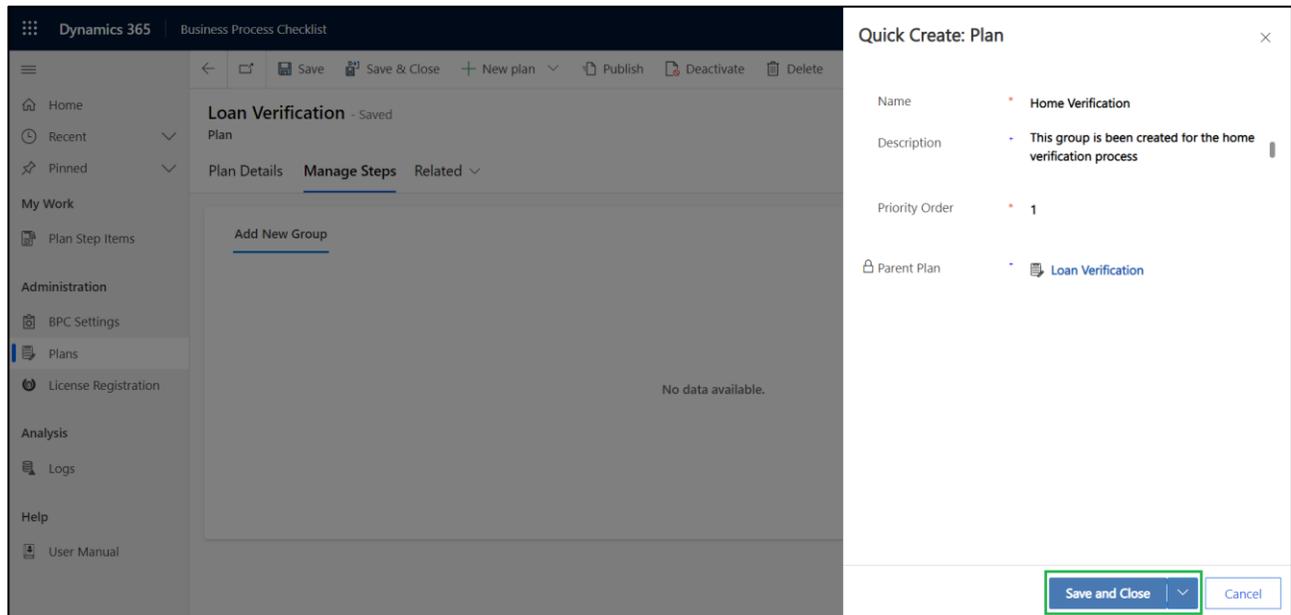


- Click on the '**Add New Group**' button.

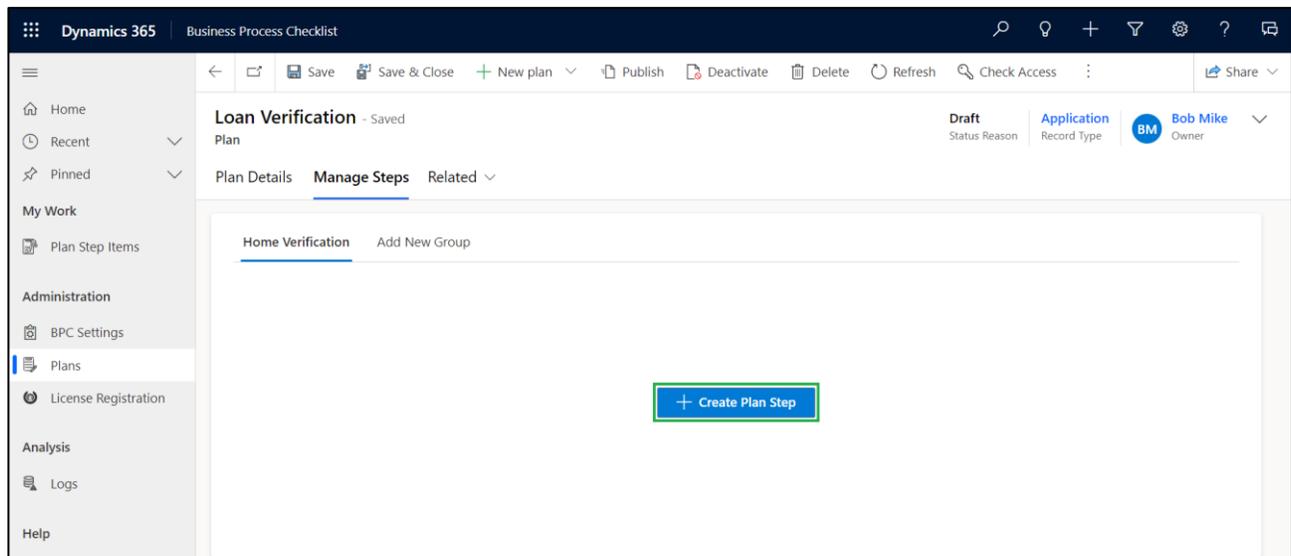


- This will open the '**Quick Create Form: Plan**', where we need to fill in the details.
  - **Name:** Provide an appropriate name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.
- Once the required fields are filled, click on '**Save and Close**'.

## Business Process Checklist – User Manual

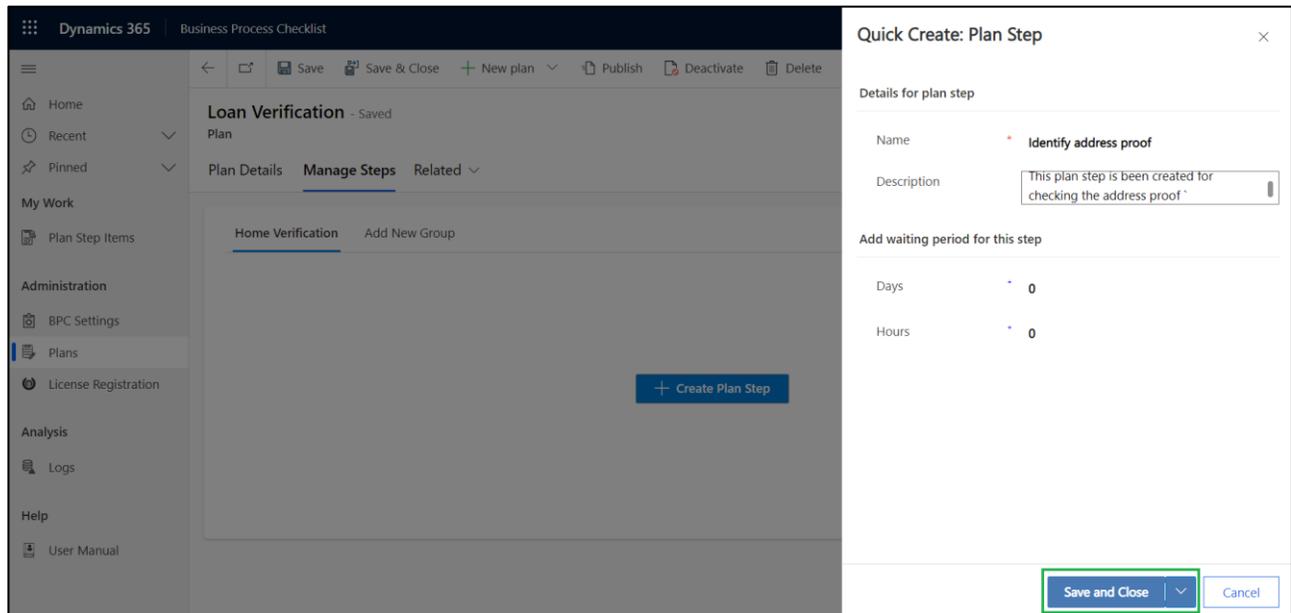


- Click on the 'Create Plan Step' button.

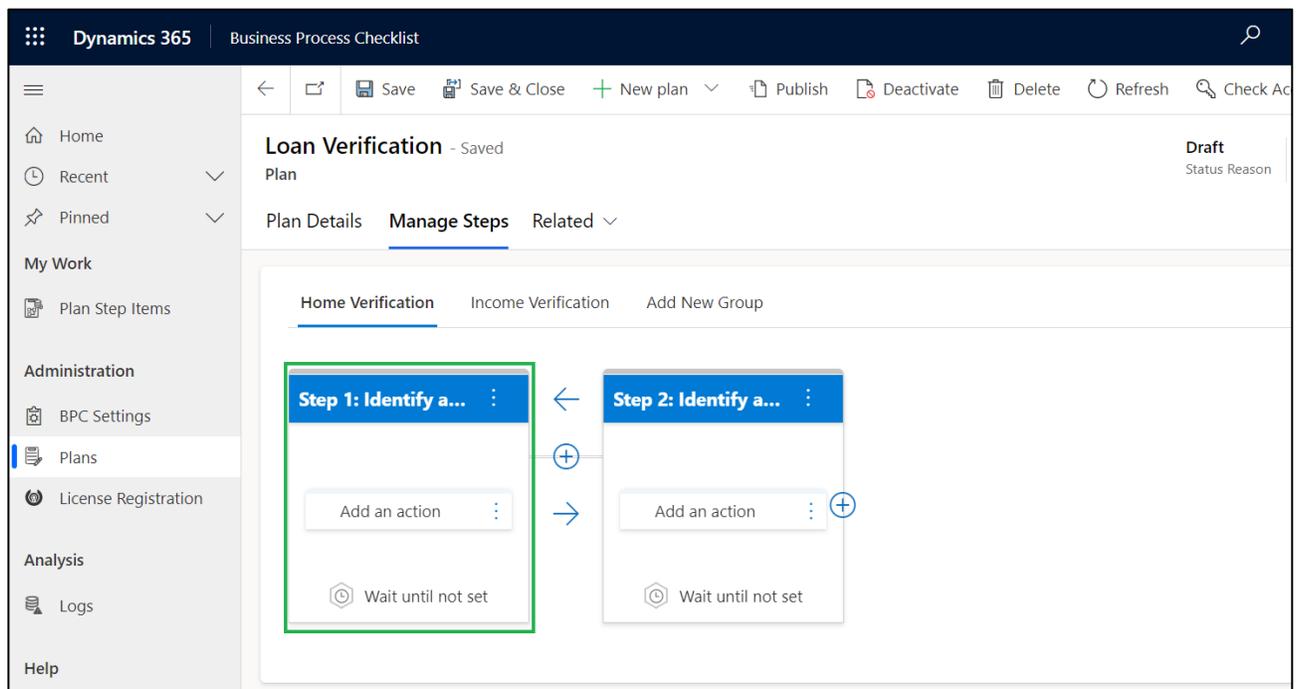


- This will open the 'Quick Create Form: Plan Step', where we need to fill in the details.
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
  - **Add a waiting period for this step (Optional):** A waiting period can be added to define when the plan step should be performed. Once the waiting period is over the plan step actions within the plan step can be performed to eventually complete the plan step. For example, If there is a step in the process to send a product introduction email and the waiting period for it is set to 1 day, then the actual email action within the plan step can only be performed after the waiting period ends, i.e., after 1 day.
    - **Days:** Add the desired waiting period for this step to be performed after 'X' Days.
    - **Hours:** Add the desired waiting period for this step to be performed after 'X' Hours.
- Once the required fields are filled, click on 'Save and Close'.

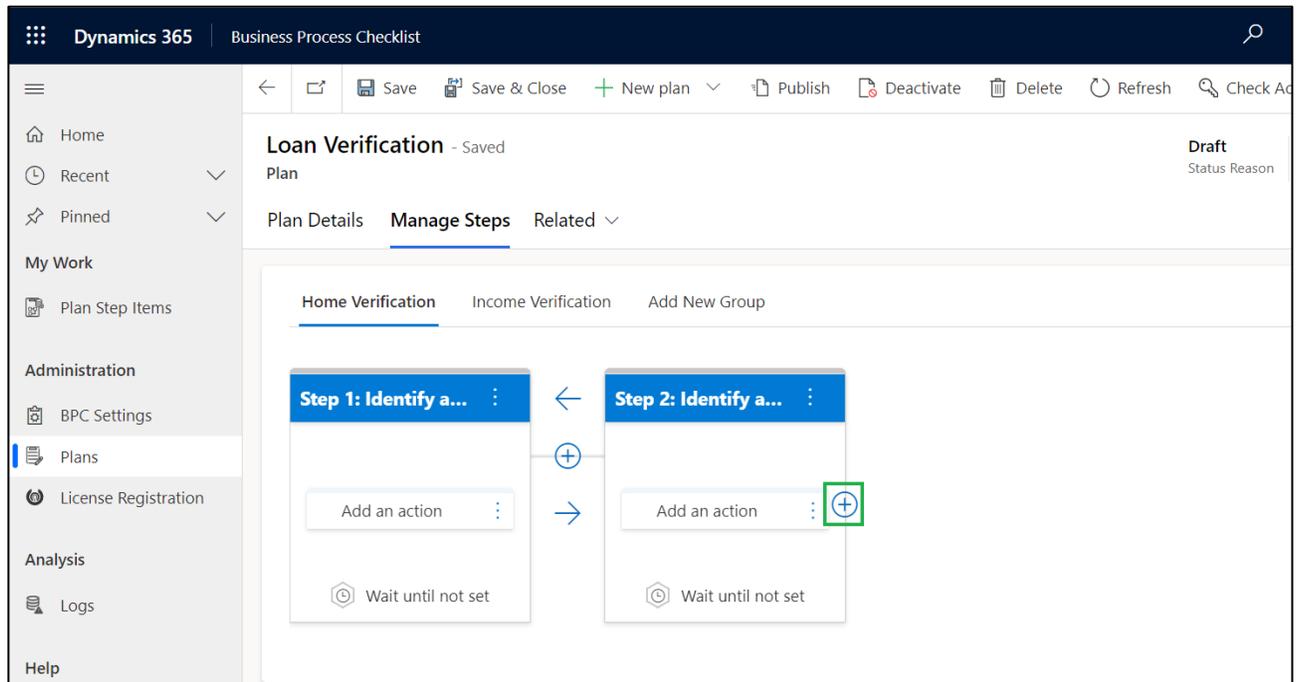
## Business Process Checklist – User Manual



- Your plan step will be added to the plan and will appear on **Plan Steps**.



- We can add multiple steps, by clicking on the '+' button, as shown below.



- To create Plan Step Actions, [click here](#).

In this way, Process-Type plan for Custom Groups can be created with plan steps and plan step actions.

You can also create a Checklist-Type plan for Custom Groups.

### Checklist-Type Plan for Custom Groups:

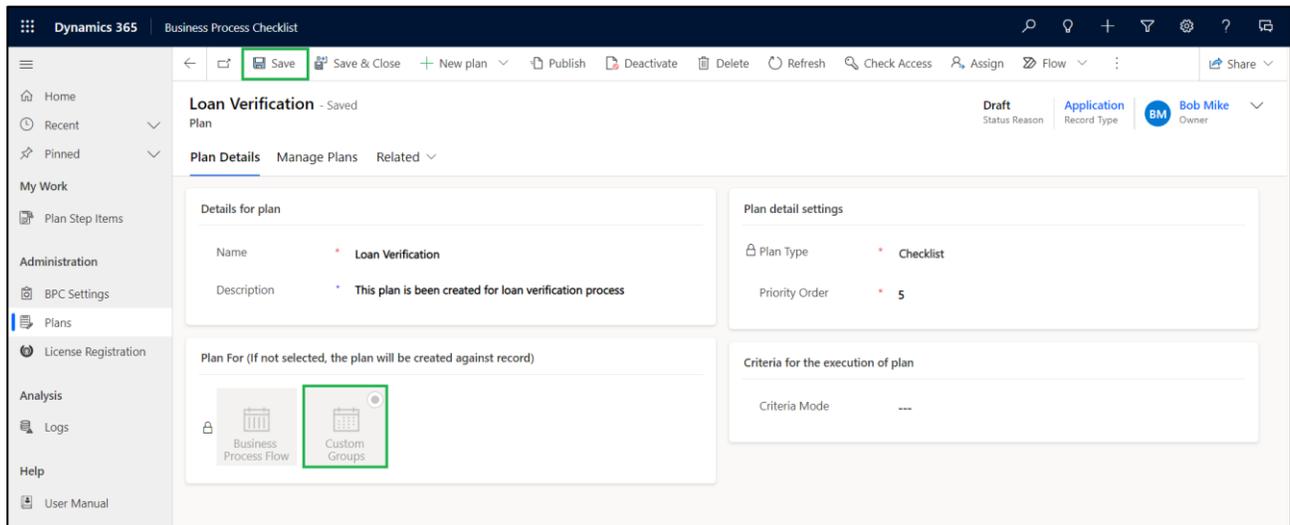
To create plans for Custom Groups where the tasks of the plan can be performed independently regardless of the set order, you need to create a **Checklist-Type** plan for Custom Groups. Where you can proceed to the next task before completing the current one.

This proves useful for creating flexible plans for Custom Groups where your salesperson can perform tasks based on their requirements of the business process, irrespective of the order of tasks set in the plan.

To create a Checklist-Type plan for Custom Groups, follow the steps given below:

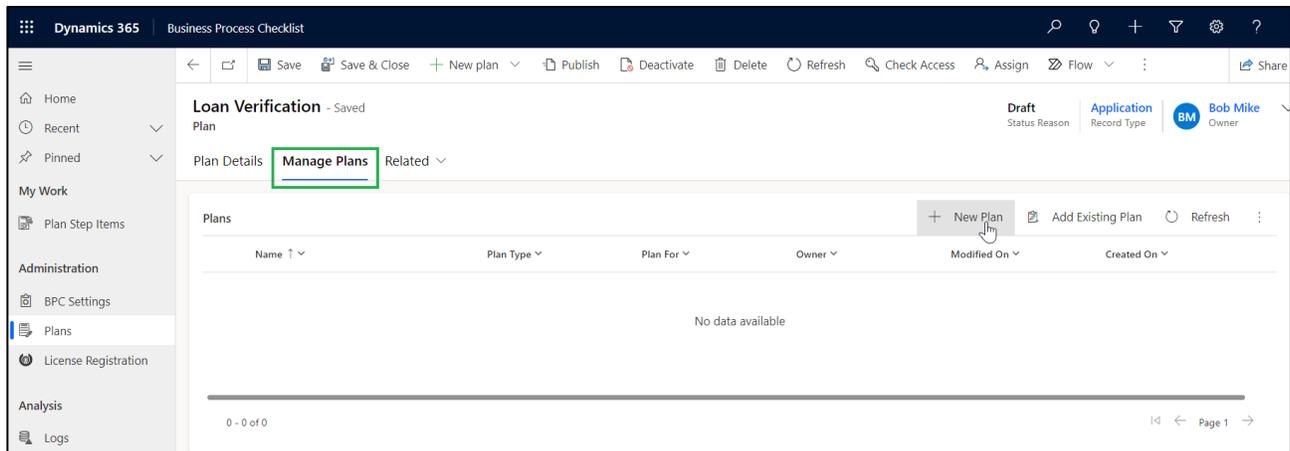
- **Fill in the following plan details:**
  - **Name:** Provide a unique name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Plan Type:** Select Plan Type as **Checklist**.
  - **Record Type:** Select the **Record Type** for which the plan will be created. (E.g. Lead, Opportunity, Case, or Custom record type etc.)
  - **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.

- **Set criteria for the execution of the Plan (Optional):** Set the criteria against the plan (the plan will automatically attach against those for which the criteria match). Select either **Simple** or **Advanced**.
  - **Simple:** Execute plans based on the conditions defined in view of an entity.
  - **Advanced:** Execute plans based on filter criteria or conditions (conditions defined in Fetch XML).
- Select '**Custom Groups**'.
- Once the required fields are filled, click on '**Save**'.



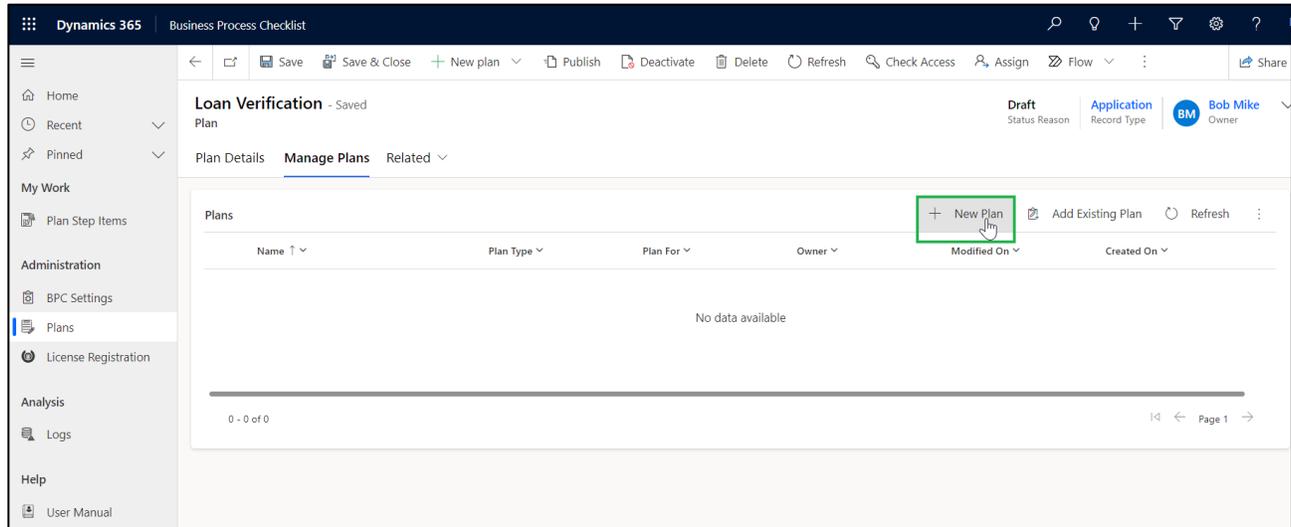
Your Checklist-Type plan for Custom Groups is created, and now you can add the Plan Steps for the created plan. To do the same, follow the steps given below:

- Navigate to **Manage Plans**.

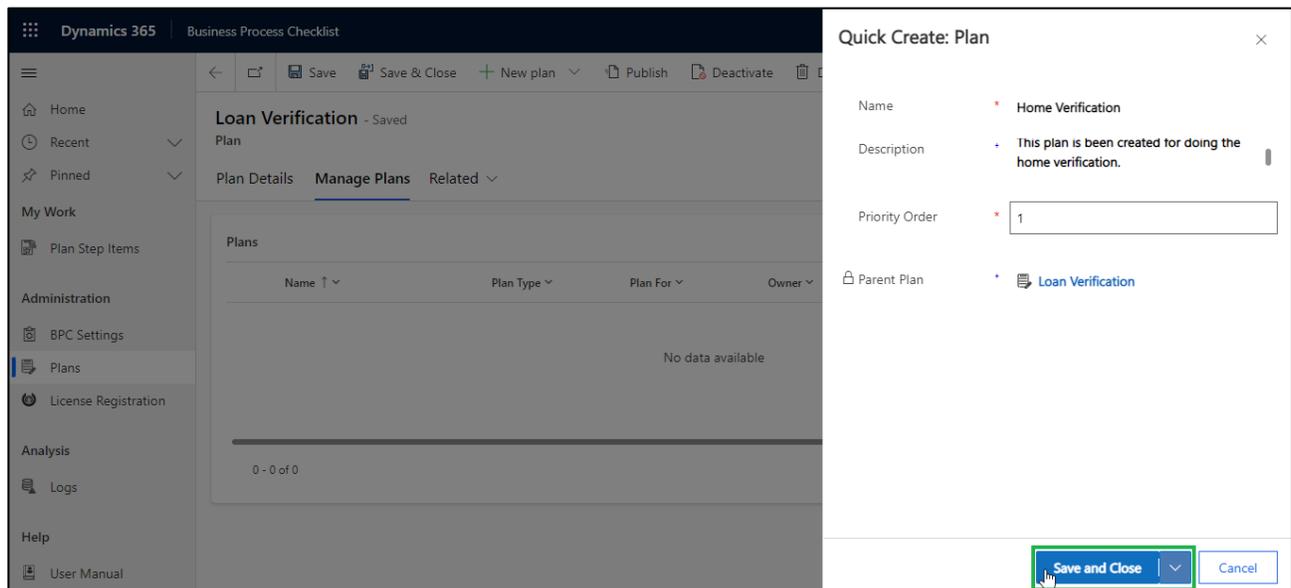


- Click on the '**New Plan**' button.

## Business Process Checklist – User Manual

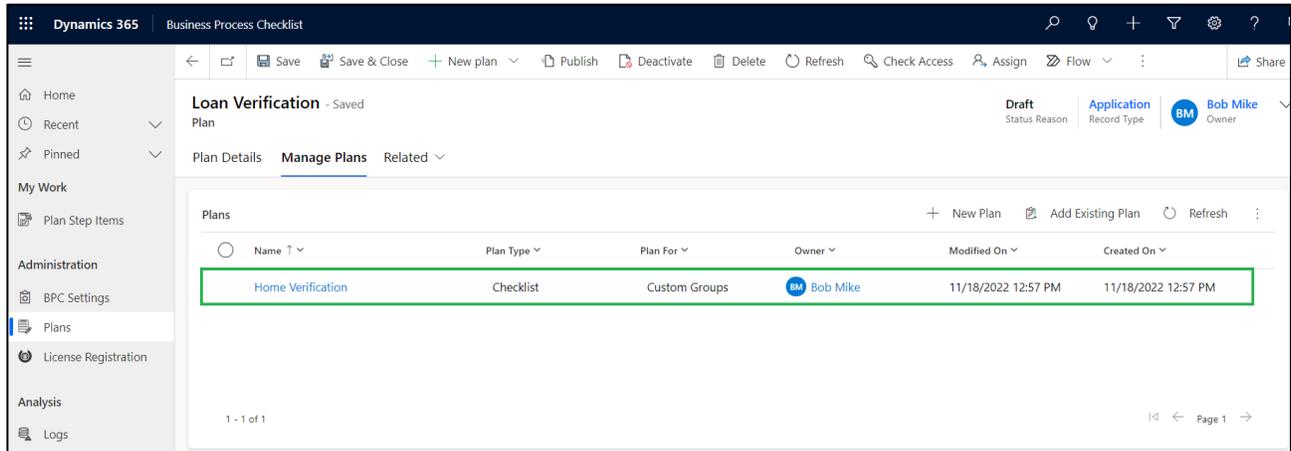


- This will open the **'Quick Create Form: Plan'**, where we need to fill in the details.
  - **Name:** Provide an appropriate name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Priority Order:** Users can attach multiple plans to a single record, for which it is necessary to define which plan needs to be connected to the record first. To do this, you can set the priority order against the plan (if the criteria are matching with three different plans, then the plan that has to be followed, we need to set the priority order number respectively). Any value less than 1 or repeated numbers are invalid for this priority order field.
- Once the required fields are filled, click on **'Save and Close'**.

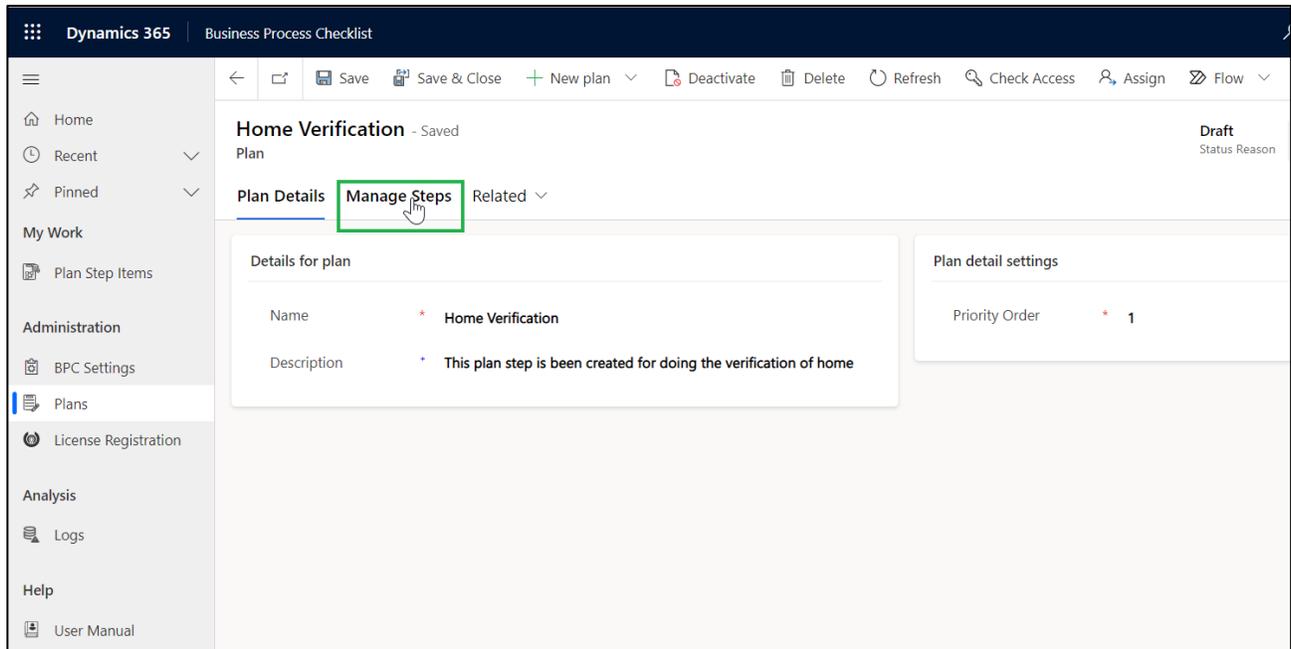


- Your **Child plan** will be added to plans.
- Now click on the **Child plan**.

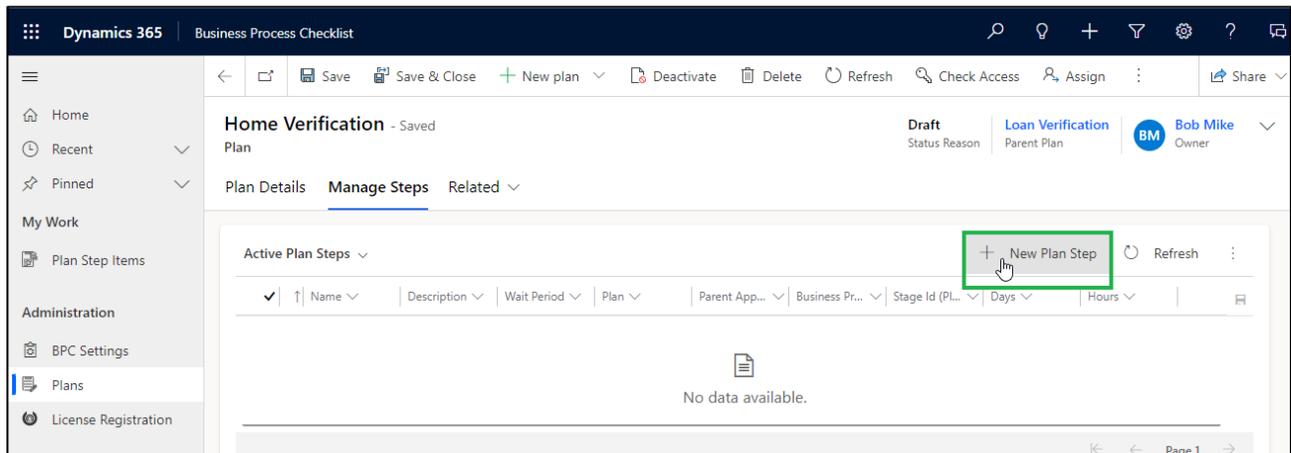
# Business Process Checklist – User Manual



- Navigate to **Manage Steps**.

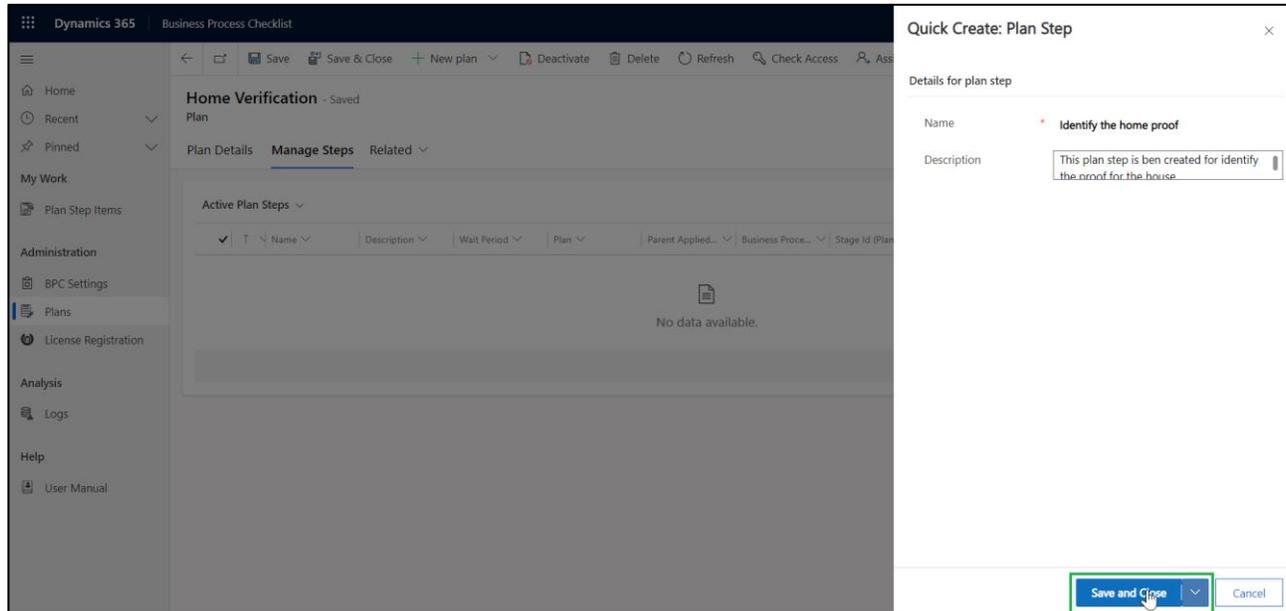


- Click on the **'New Plan Step'** button.

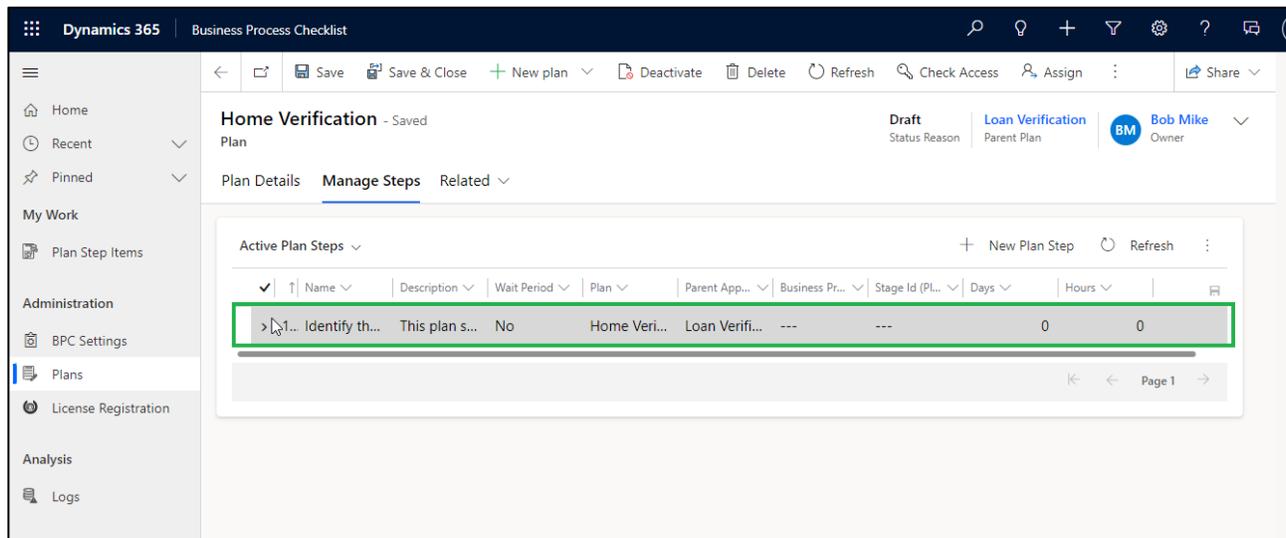


## Business Process Checklist – User Manual

- This will open the **‘Quick Create Form: Plan Step’**, where we need to fill in the details.
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
- Once the required fields are filled, click on **‘Save and Close’**.



- Your plan step will be added to the plan and will appear on **Plan Steps**.



In this way, Checklist-Type plans for Custom Groups can be created with plan steps.

## Revise Plan

Business Process Checklist allows you to revise plans once they have been created. Plans can be revised to suit the circumstances of the business process. In Business Process Checklist, you can easily modify existing Plans, Plan Steps, and Plan Step Actions as and when required.

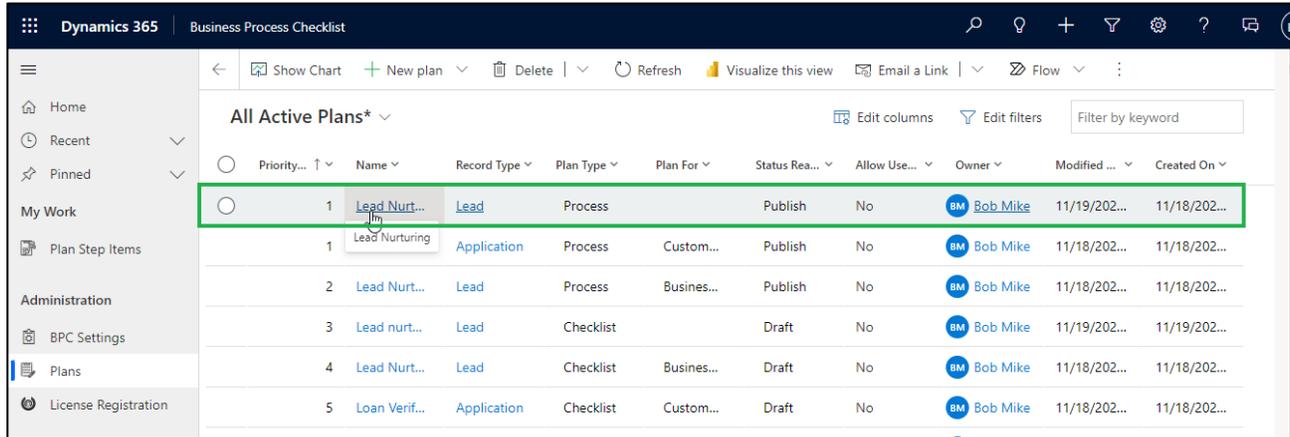
To revise existing published Plans for both Process and Checklist-Type plans, follow the steps given below:

### Revise Plan - Process:

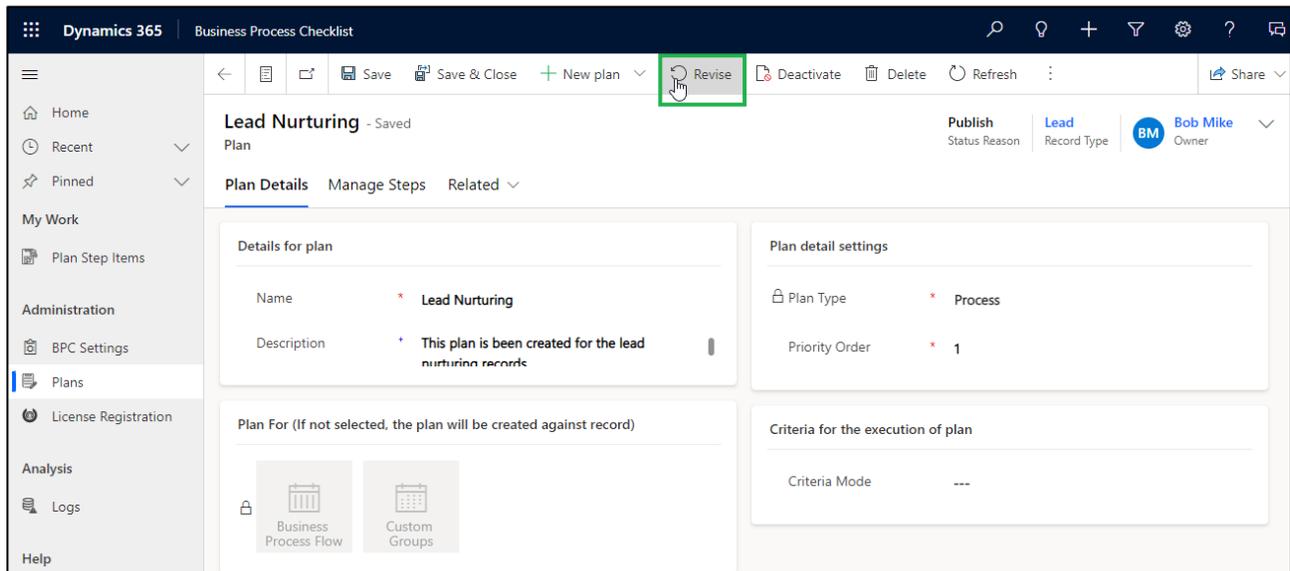
To revise Process-Type plans, plan steps and plan step actions follow the steps given below:

### Plan

- To revise existing published plans, navigate to **Plans --> Open existing published plan.**

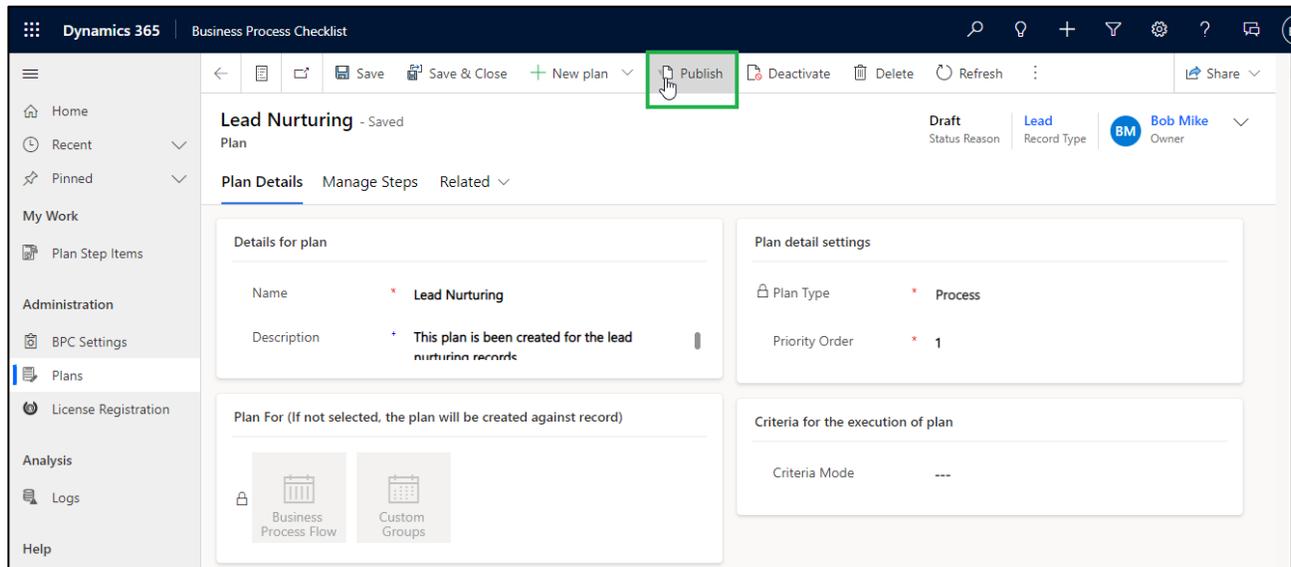


- Click on the **'Revise'** Button, this will change the plan status to **Draft**.



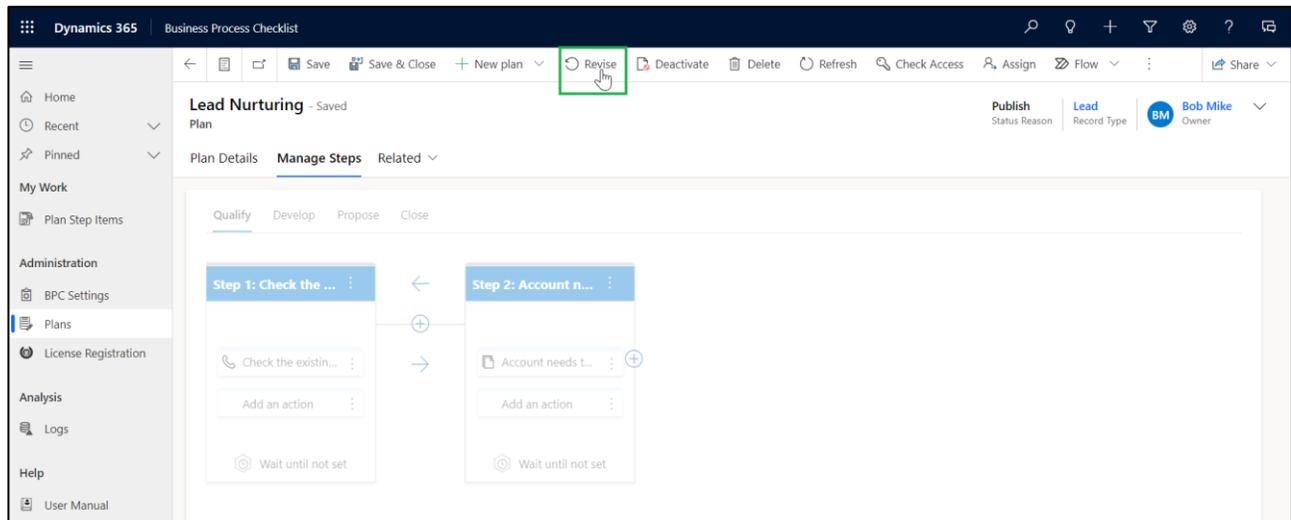
- Make the required changes to the plan --> Click on the **'Publish'** button.

## Business Process Checklist – User Manual



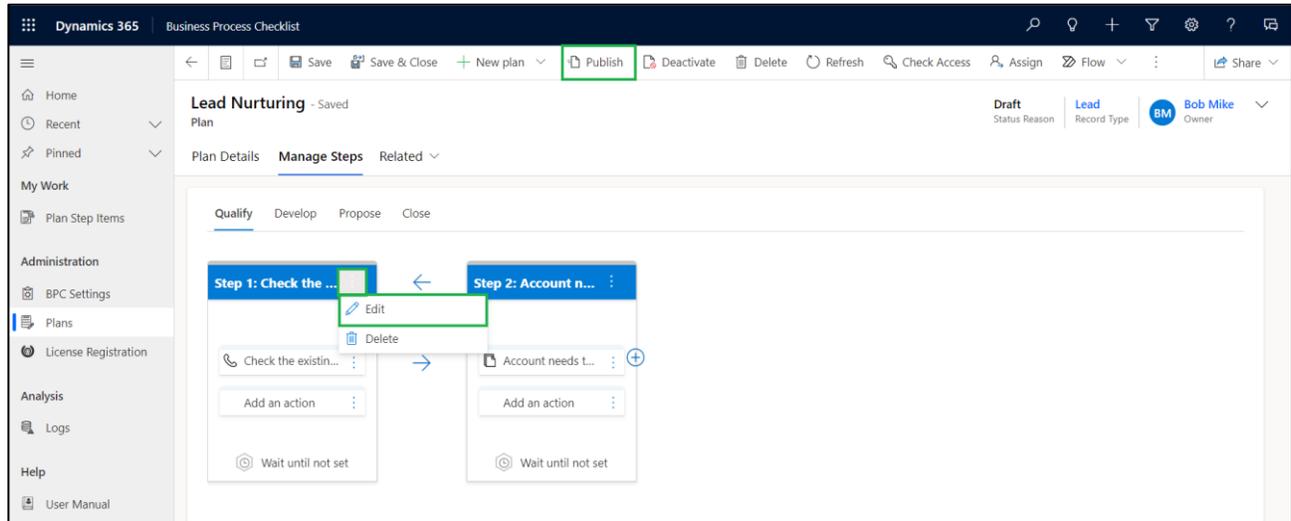
### Plan steps

- To Edit Plan Step, navigate to **Manage Steps** --> Click on the **Revise** Button.



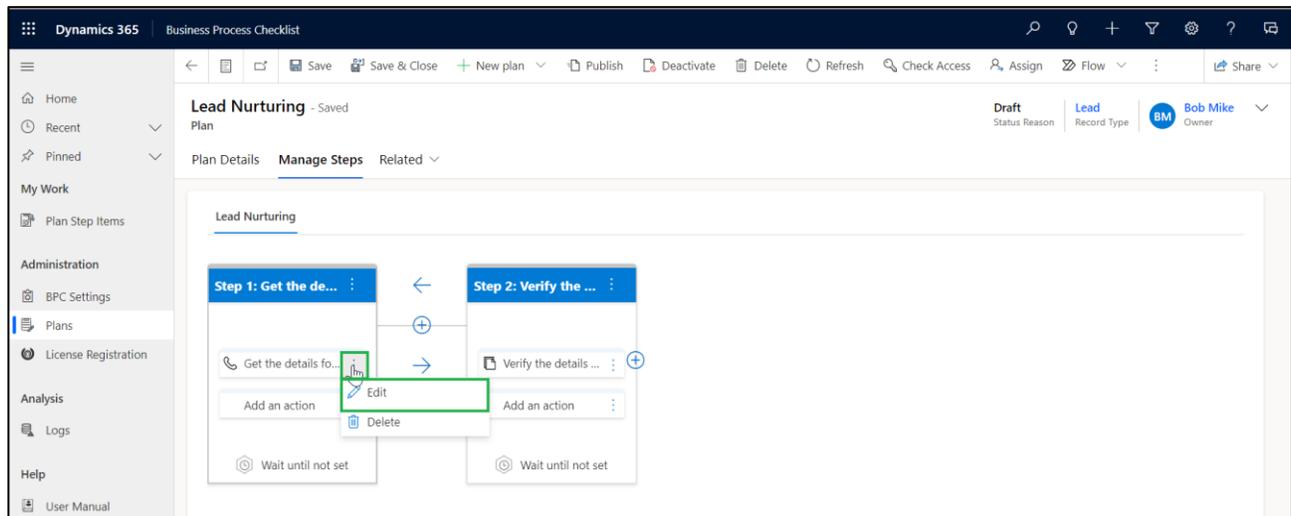
- Click on the **ellipsis** --> Click on **'Edit'**.
- Make the required changes to the plan step --> Click on the **'Publish'** Button.

## Business Process Checklist – User Manual



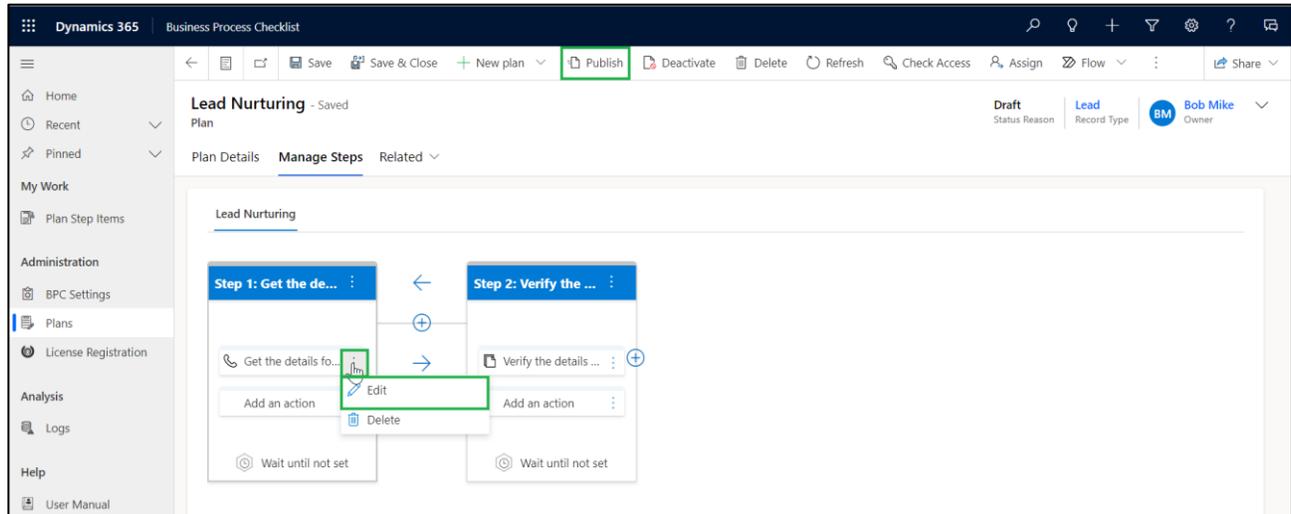
### Plan Step Action

- To Edit Plan Step Action, navigate to --> **Manage Steps** --> Click on the **ellipsis** --> Click on **'Edit'**.



- Make the required changes to the Plan Step Action --> Click on the **'Publish'** Button.

## Business Process Checklist – User Manual



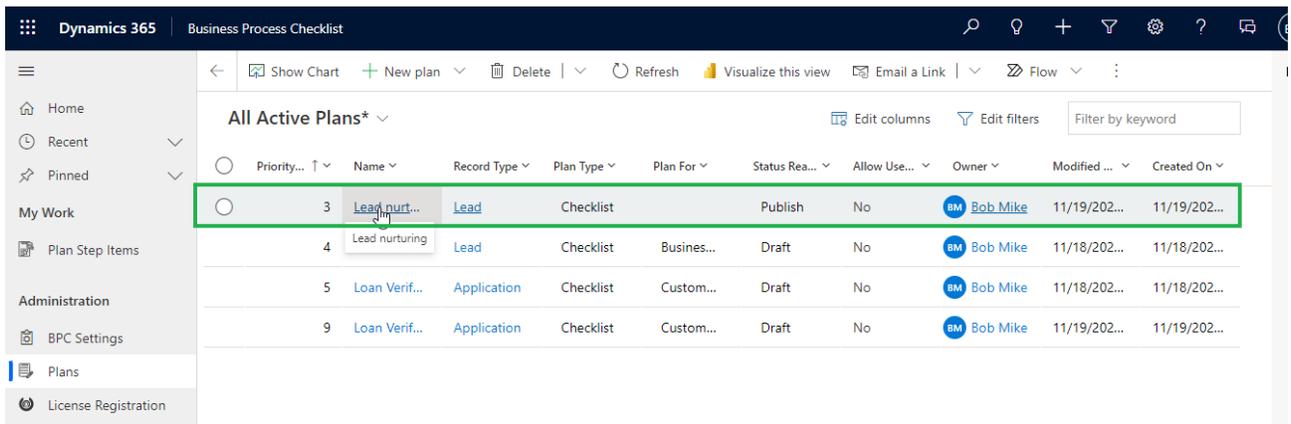
In this way Process-Type plan, plan steps and plan step actions can be revised to suit the business requirement.

### Revise Plans-Checklist:

To revise Checklist-Type plans and plan steps follow the steps given below:

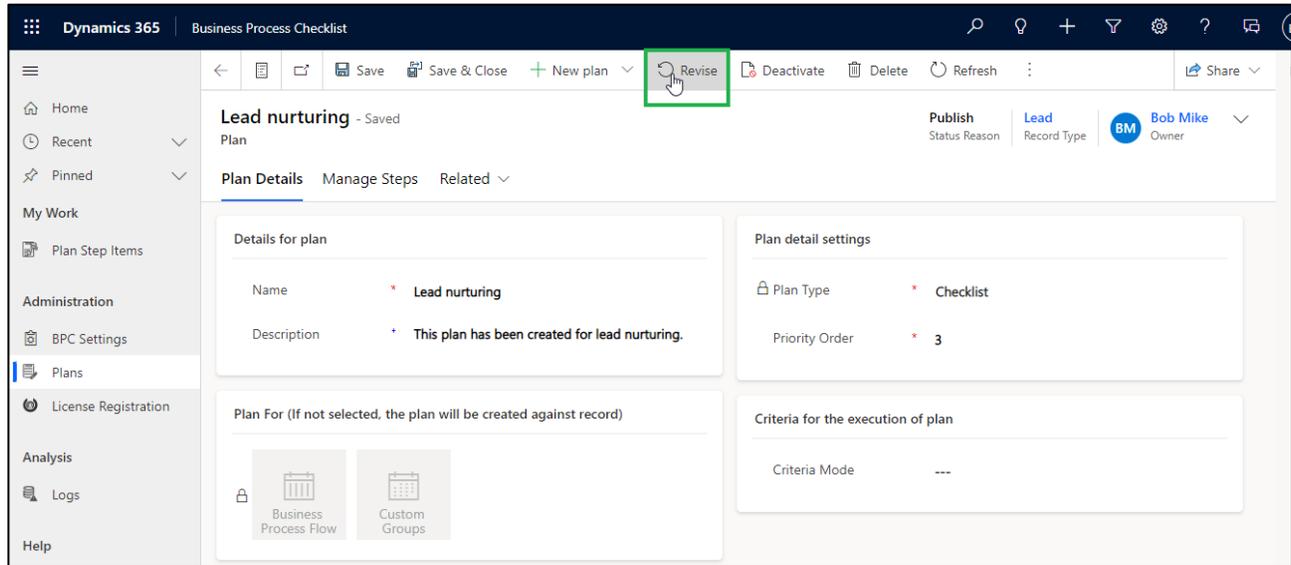
#### Plan

- To revise existing published plans, navigate to **Plans --> Open existing published plan.**

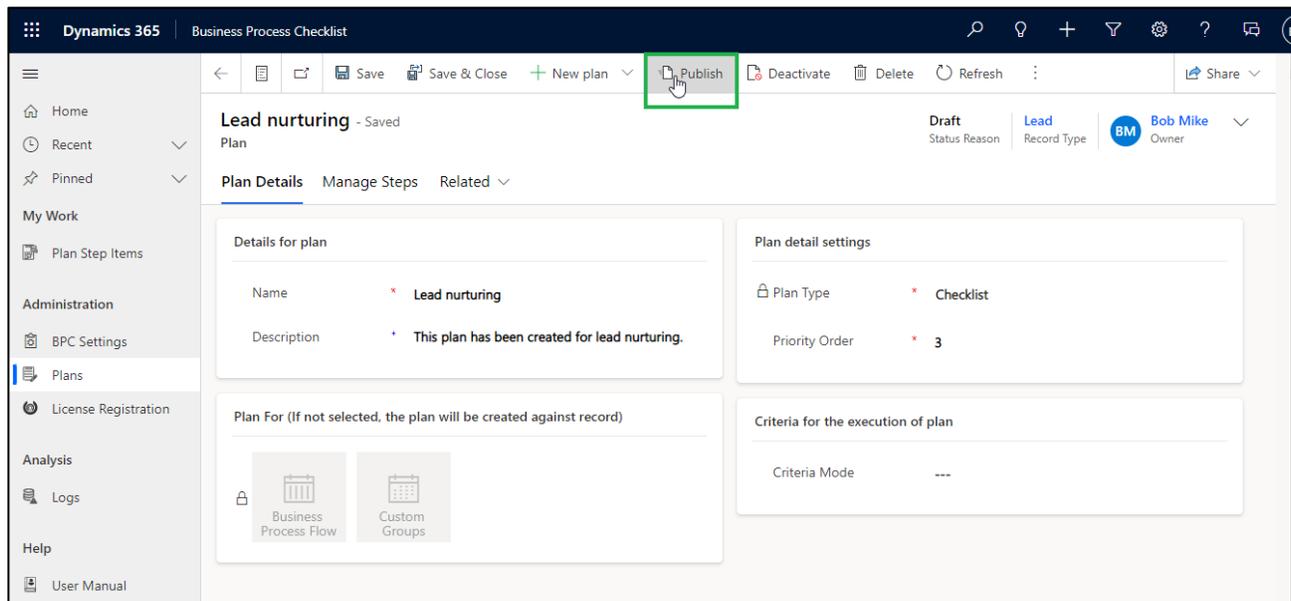


- Click on the '**Revise**' Button, this will change the plan status to **Draft**.

## Business Process Checklist – User Manual



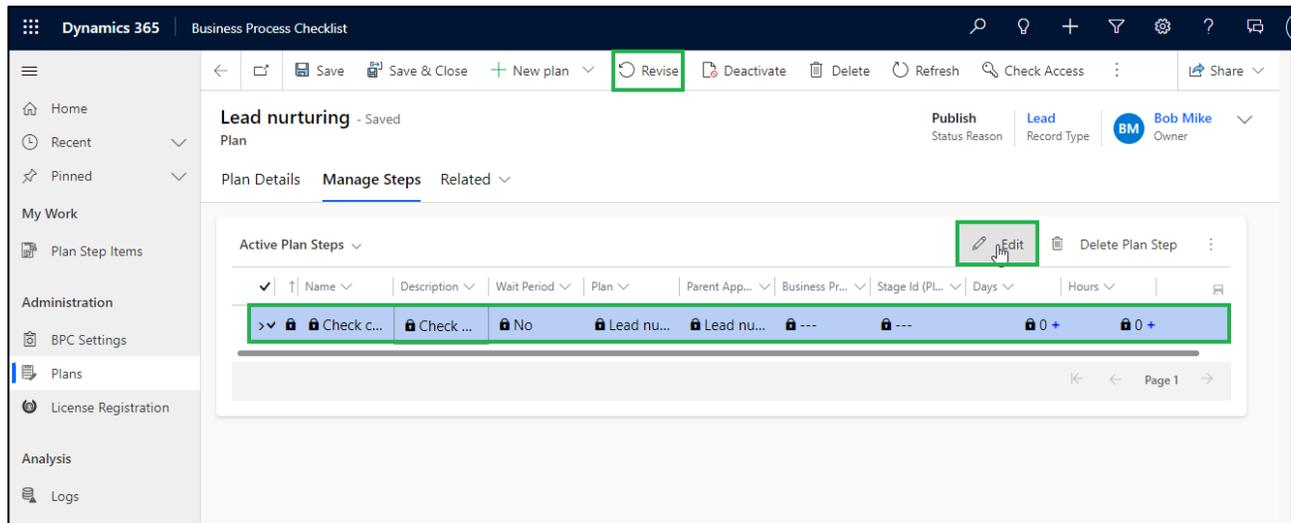
- Make the required changes to the plan --> Click on the 'Publish' button.



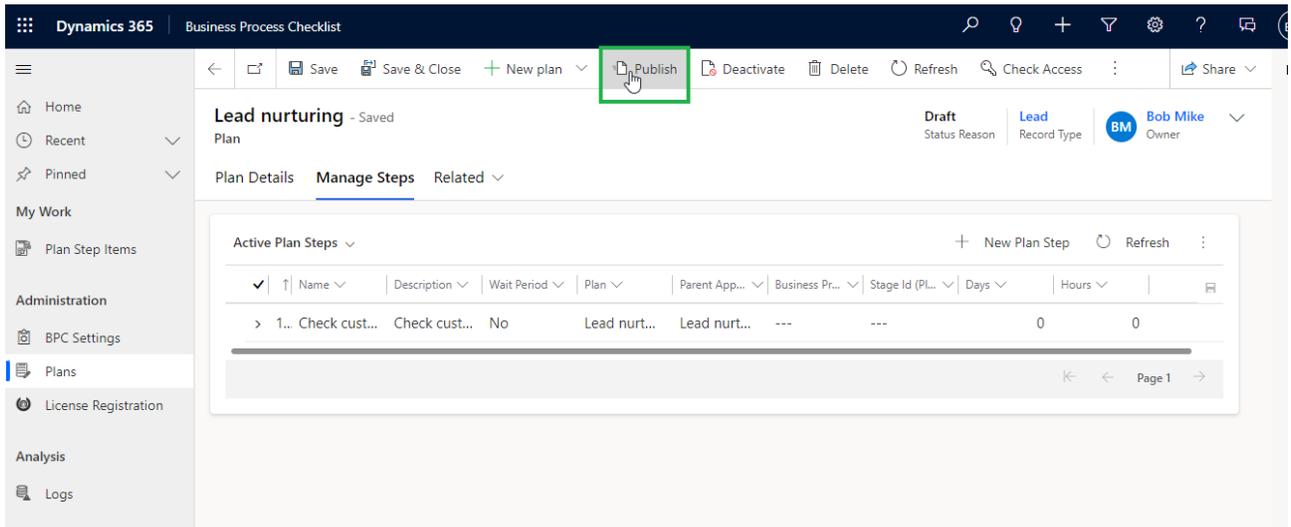
### Plan Step

- To Edit Plan Step, navigate to --> **Manage Steps** --> Click on **Revise**--> Select the **Existing Plan Step** you want to edit --> Click on the **'Edit' Button**.

## Business Process Checklist – User Manual



- Make the required changes to the plan step --> Click on 'Publish'.



In this way Checklist-Type plan and plan steps can be revised to suit the business requirement.

### Delete Plans

You can delete plans that are no longer in use by your organization, and they'll be deleted from the Business Process Checklist app. You can delete active or inactive plans. When you delete an active plan, the records that were connected with the plan earlier will still have those plans attached to them, but no new plan will be attached to the new records added.

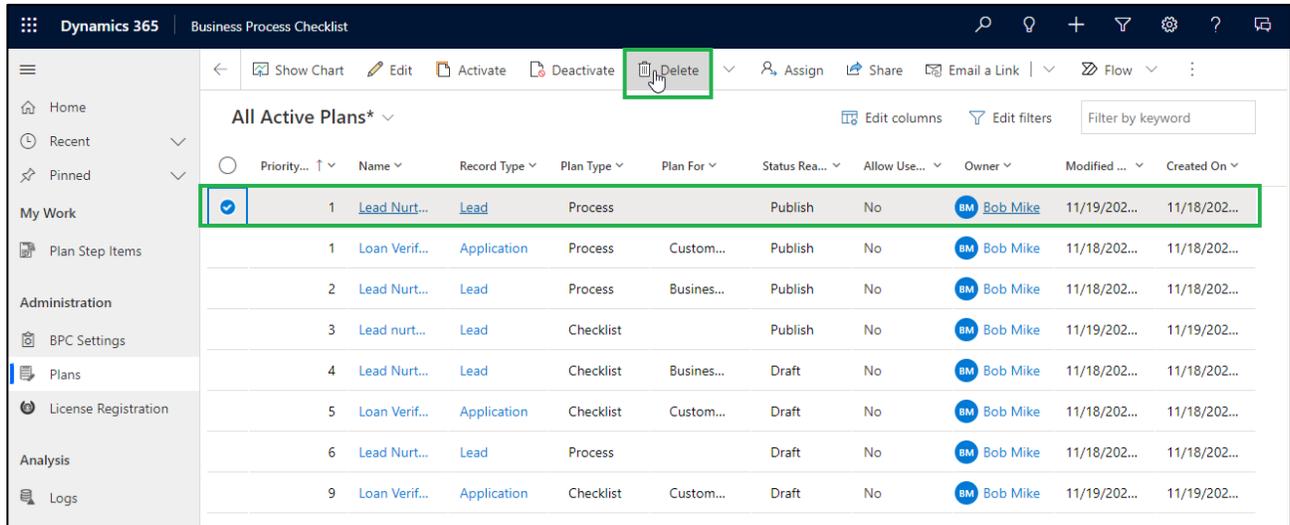
To delete existing Plans, Plan Steps, and Plan Step Actions for both Process and Checklist-Type plans, follow the steps given below:

#### Delete Plan - Process:

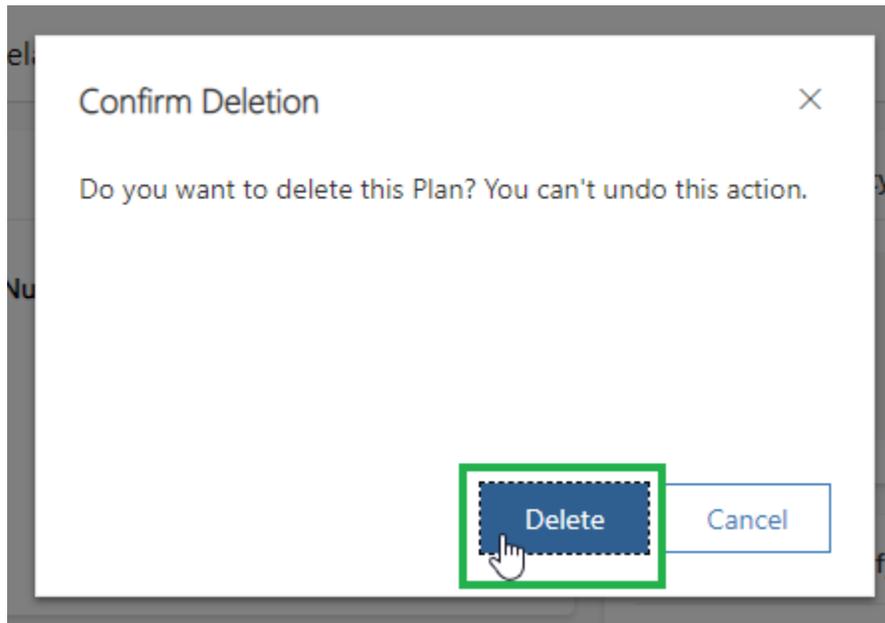
To delete Process-Type plans, plan steps and plan step actions follow the steps given below:

## Plan

- To delete plans, navigate to **Plans** --> **Select the Existing Plan** you want to delete --> Click on the **Delete Button**.



- Click on 'Delete'.

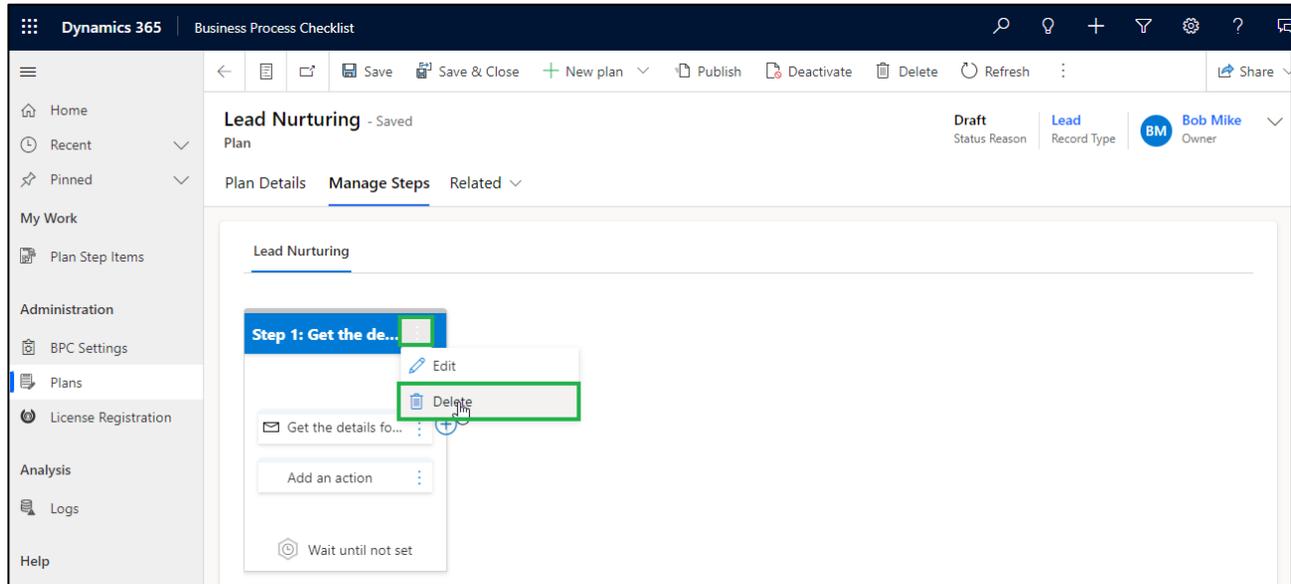


**Note: If a plan is deleted, then the associated Plan steps and Plan Step Actions will also be deleted.**

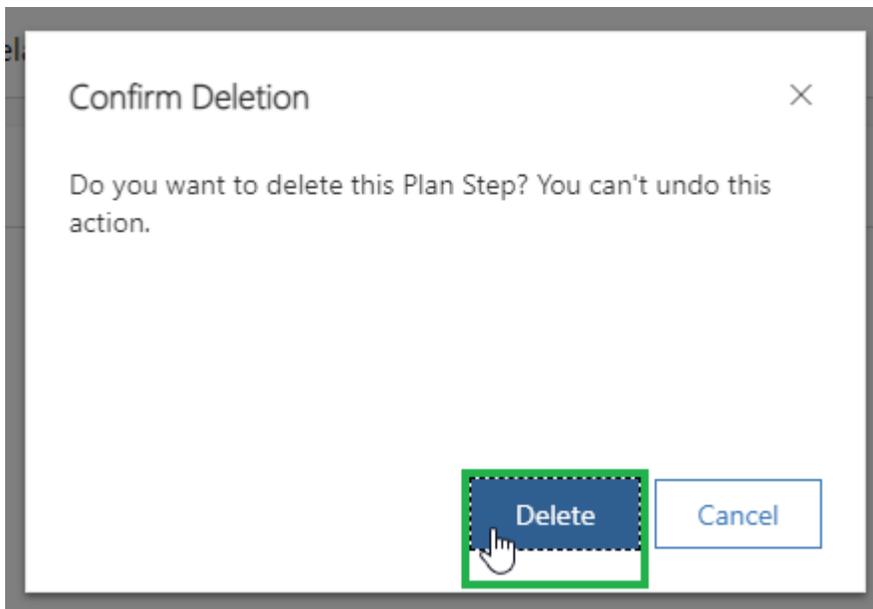
## Plan Step

- To Delete Plan Step, navigate to **Manage Steps** --> Click on **Revise** --> **Select the Existing Plan Step** you want to delete--> Click on the **ellipsis** --> Click on 'Delete' Button.

## Business Process Checklist – User Manual



- Click on '**Delete**'.

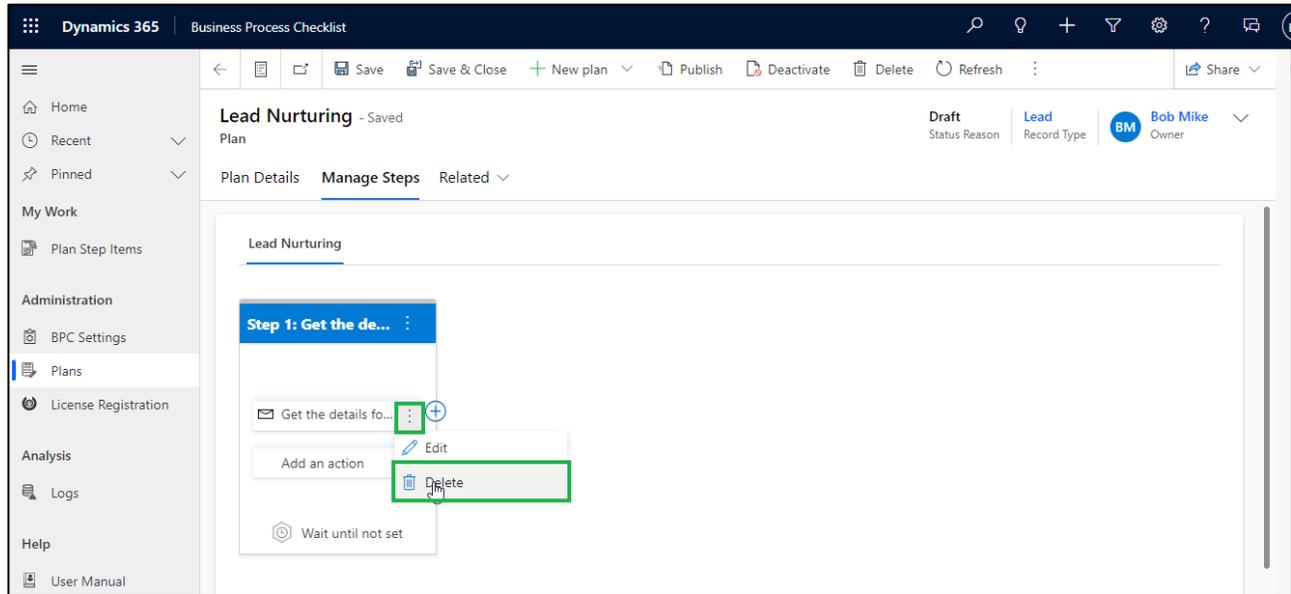


**Note: If Plan Step is deleted then associated plan step actions are deleted automatically.**

### Plan Step Action

- To Delete Plan Step Action, navigate to **Manage Steps** --> Click on **Revise** --> **Select the Existing Plan Step Action** you want to delete --> Click on the **ellipsis** --> Click '**Delete**'.

## Business Process Checklist – User Manual



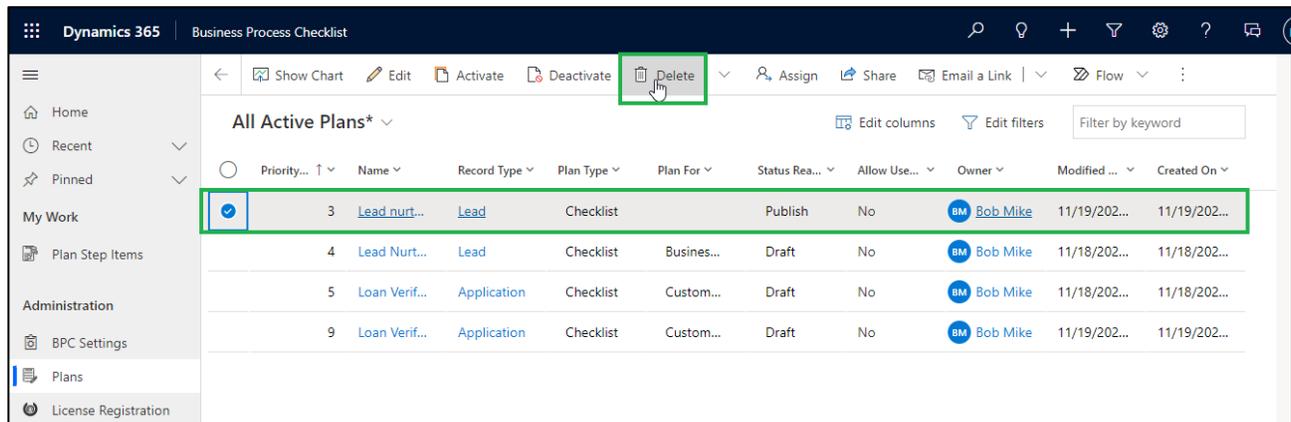
In this way **Process-Type** plan, plan steps and plan step actions that are no longer in use can be deleted.

### Delete Plan - Checklist:

To delete **Checklist-Type** plans and plan steps follow the steps given below:

#### Plan

- To delete plans, navigate to --> **Plans** --> **Select the Existing Plan** you want to delete --> Click on the **'Delete'** Button.

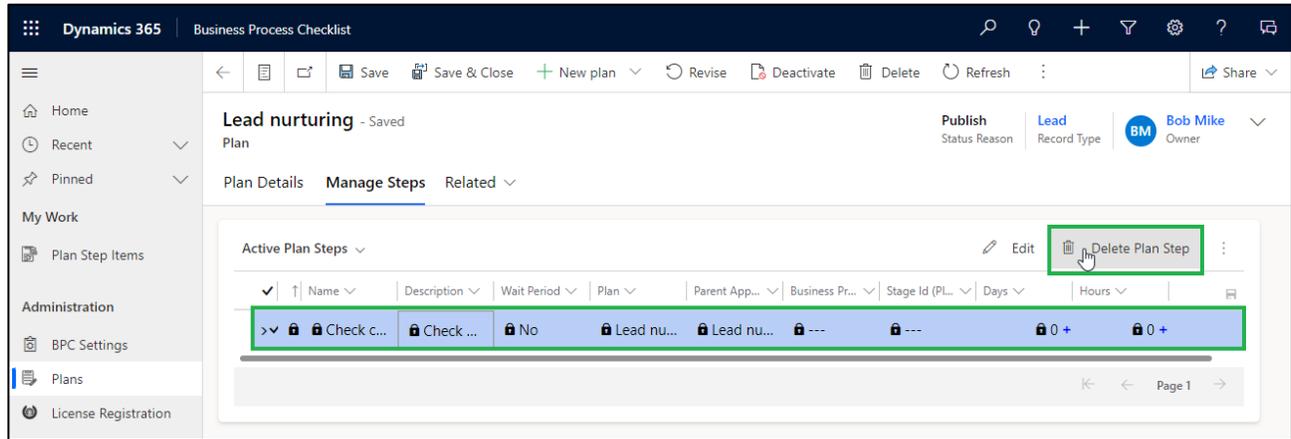


**Note: If a plan is deleted then the associated Plan steps will also be deleted.**

#### Plan Step

- To Delete Plan Step, navigate to **Manage Steps** --> **Select the Existing Plan Step** you want to delete --> Click on **'Delete Plan Step'**.

## Business Process Checklist – User Manual



In this way, Checklist-Type plans and plan steps that are no longer in use can be deleted.

### Plan Items

Plan items are tasks and activities within a plan that a user can perform to complete a plan successfully. Here is how users can interact with these plan items (i.e., plan steps and plan step actions):

- Auto Attach the Plan to Record
- View Record Details
- View Plan Details
- View Plan Items on Record

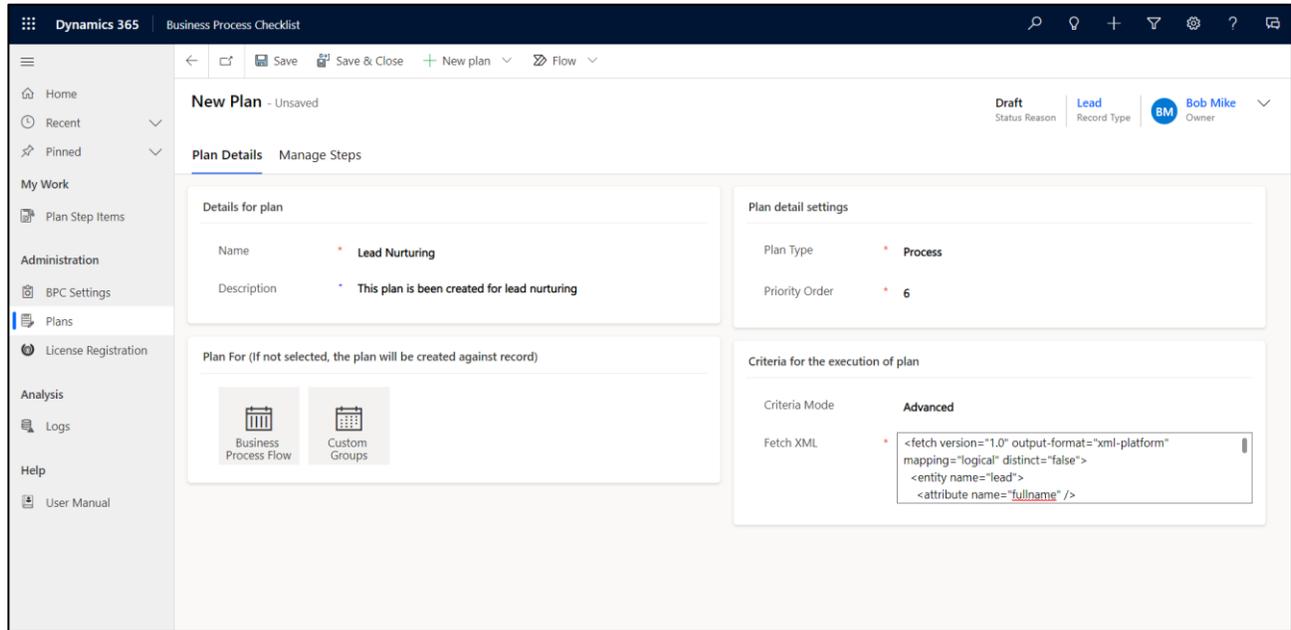
### Auto-Attach the Plan to Record

Plans defined by the manager will automatically get attached to the records as per the matched criteria. And whenever a new record will be created in the chosen record type the set plan for it will automatically get connected to the newly created record.

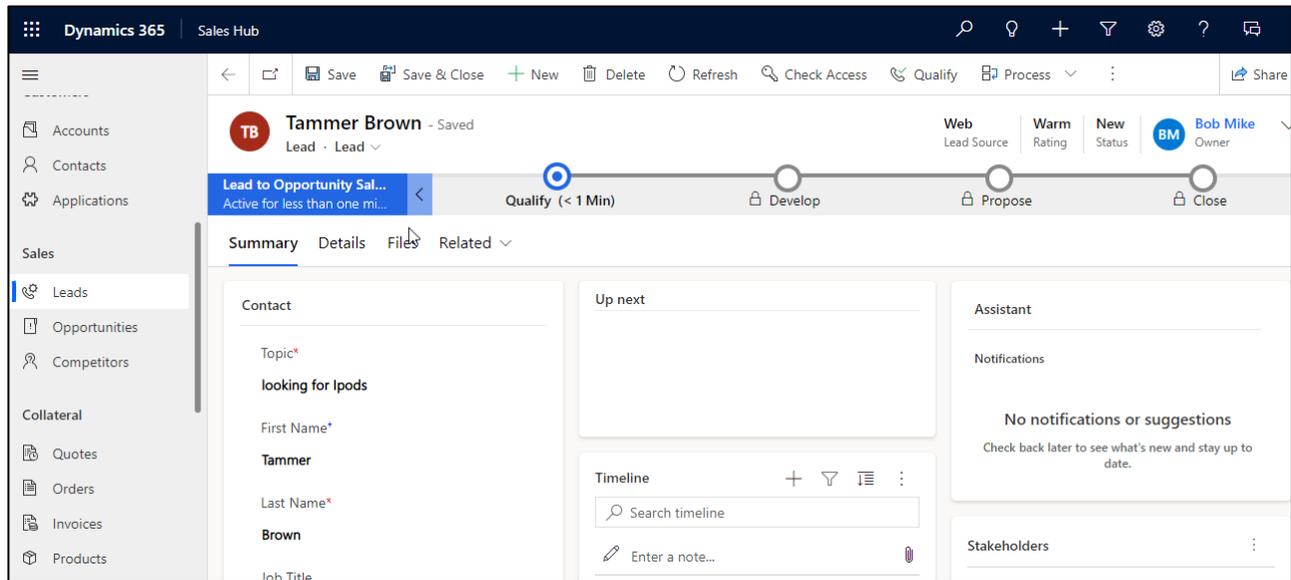
**Below is an example:**

- Suppose the manager has created a plan for lead nurturing for the lead entity, where the criteria are set as lead source as "**Web**".

## Business Process Checklist – User Manual



- Navigate to **Sales Hub** --> Go to **Leads** --> Create a **New Lead** with source as **Web**.



- So, whenever the lead is created with the lead source as **“Web”** then the lead nurturing plan will get attached to that lead record.

## Business Process Checklist – User Manual

The screenshot displays the Dynamics 365 Business Process Checklist interface. The top navigation bar includes 'Dynamics 365' and 'Business Process Checklist'. The left sidebar shows navigation options like 'Home', 'Recent', 'Pinned', 'My Work', 'Administration', 'Analysis', and 'Help'. The main content area is divided into three sections: 'My Day' (containing 'Open' and 'Completed' task lists), a 'Filter by keyword' search box, and a detailed view for 'Smith Parker'. The detailed view shows a 'Work Plan: Loan Verification' with progress bars for 'Home Verification (1/2)' and 'Income Verification (0/1)'. A 50% progress bar is visible. Below the progress bars, there are two task items: 'Identify address proof' (checked) and 'Identify address proof via phone call' (unchecked).

### Miscellaneous Features:

- The action can be completed by clicking on the **checkbox**.

This screenshot is identical to the one above, but with a green rectangular box highlighting the checkbox for the 'Identify address proof' task in the detailed view for 'Smith Parker'. The checkbox is checked, and the text below it reads: 'This plan step is been created for checking the address p...'. This highlights the feature that users can skip a plan step by checking the checkbox.

- Users can be able to skip the **plan step** instead of performing it.

## Business Process Checklist – User Manual

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 is divided into three columns: 'Open (4)', 'Completed (3)', and a detailed view for 'Smith Parker'. The 'Open' column lists tasks for Smith Parker, Ana Justice, and James Lee. The 'Completed' column lists tasks for Smith Parker and Tamer Brown. The detailed view for Smith Parker shows a 'Work Plan: Loan Verification' with progress bars for 'Home Verification (1/2)' and 'Income Verification (0/1)'. A task 'Identify address proof via phone call' is highlighted with a green border and a star icon, indicating it is a favorite.

- The user can check the progress and number of completed steps count.

This screenshot is similar to the one above but highlights a different feature. In the detailed view for 'Smith Parker', the 'Home Verification (1/2)' progress bar is highlighted with a green border. Below the progress bars, the task 'Identify address proof via phone call' is shown with a checkbox and a star icon, indicating it is a favorite. The 'Completed' column shows that this task has been completed.

- Users can mark plan steps as favorites by clicking on the icon shown below. Once marked as favorites, users can see them in the Important Items View.

## Business Process Checklist – User Manual

The screenshot displays the Dynamics 365 Business Process Checklist interface. The top navigation bar includes 'Dynamics 365' and 'Business Process Checklist'. Below the navigation bar, there are options to 'Show Chart', 'Edit', 'Activate', 'Deactivate', 'Delete', 'Assign', 'Share', 'Email a Link', and 'Flow'. The main content area is titled 'My Day' and is divided into two columns: 'Open (4)' and 'Completed (3)'. The 'Open' column lists tasks for Smith Parker (SP), Ana Justice (AJ), and James Lee (JL). The 'Completed' column lists tasks for Smith Parker (SP) and Tamer Brown (TB). A right-hand panel shows details for Smith Parker, including a 'Work Plan: Loan Verification' and progress bars for 'Home Verification (1/2)' and 'Income Verification (0/1)'. A 50% progress bar is shown for Home Verification. Below the progress bars, there are checkboxes for 'Identify address proof' (checked) and 'Identify address proof via phone call' (unchecked).

**Note:** In the same way, you can unmark to remove favorite plan steps from the 'Important Items' view.

- Users can view the due date against each **open-plan step**. The due date can be changed as per the requirements. due date is the date on which the plan step is set to be performed.

This screenshot is identical to the one above, showing the Dynamics 365 Business Process Checklist interface. The 'Open' column lists tasks for Smith Parker (SP), Ana Justice (AJ), and James Lee (JL). The 'Completed' column lists tasks for Smith Parker (SP) and Tamer Brown (TB). The right-hand panel shows details for Smith Parker, including a 'Work Plan: Loan Verification' and progress bars for 'Home Verification (1/2)' and 'Income Verification (0/1)'. A 50% progress bar is shown for Home Verification. Below the progress bars, there are checkboxes for 'Identify address proof' (checked) and 'Identify address proof via phone call' (unchecked).

### View Record Details

Users can view the record details that he needs to follow during the course of the day without moving to the original app (Example Sales Hub).

To view, **Record Details** follow the steps below:

- Go to **Plan Step Item**.

## Business Process Checklist – User Manual

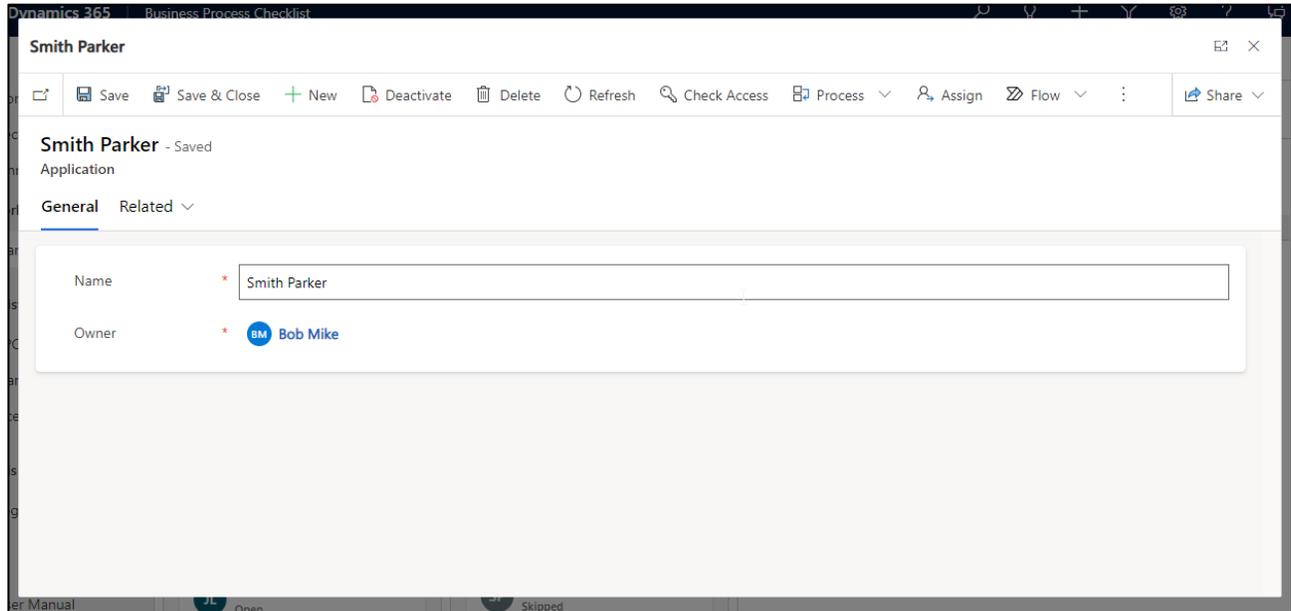
The screenshot shows the Dynamics 365 Business Process Checklist interface. The left sidebar contains navigation options: Home, Recent, Pinned, My Work, Administration (BPC Settings, Plans, License Registration), and Analysis (Logs). The main area is titled 'All Items' and is divided into 'Open (4)' and 'Completed (4)' columns. The 'Open' column lists items for Smith Parker, Ana Justice, and James Lee, all with the task 'Verify salary slip'. The 'Completed' column lists items for Smith Parker and Tamer Brown, with tasks 'Identify address proof' and 'Identify address proof via phone call'. A detailed view of the 'Smith Parker' record is shown on the right, displaying 'Work Plan: Loan Verification' with progress bars for 'Income Verification (0/1)' and 'Home Verification (2/2)'. A task 'Verify salary slip via phone call' is listed with a 0% completion indicator.

- Click on **Regarding**.

This screenshot shows the same Dynamics 365 Business Process Checklist interface, but with the 'Regarding' field in the record details view highlighted with a green box. The 'Regarding' field contains the name 'Smith Parker' and a circular icon with the initials 'SP'. The rest of the interface, including the list of items and the work plan progress, remains the same as in the previous screenshot.

- Record Details will now get displayed.

## Business Process Checklist – User Manual

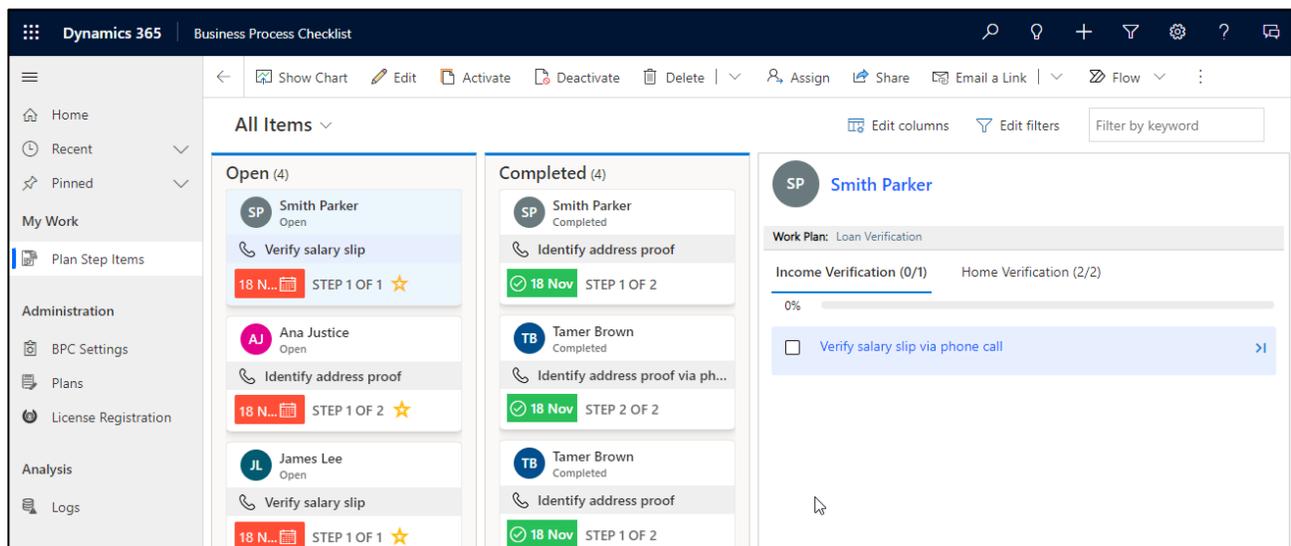


### View Plan Details

Users can view the details of plan created by the manager that he needs to follow during the course of the day.

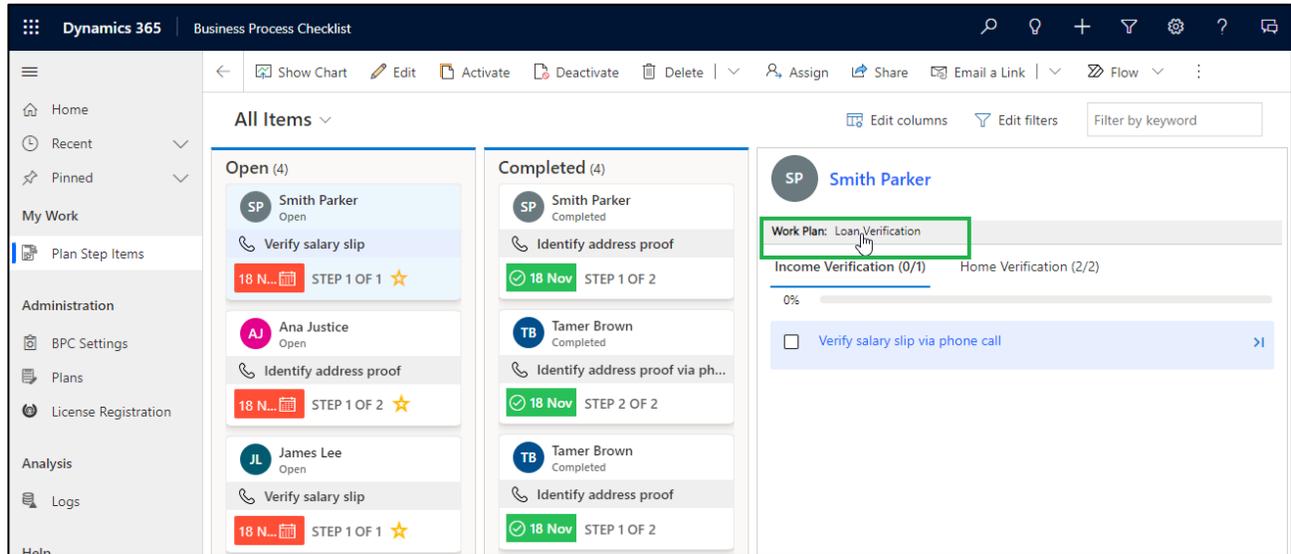
To view the **Plan Details**, follow the steps below:

- Go to **Plan Step Items**.

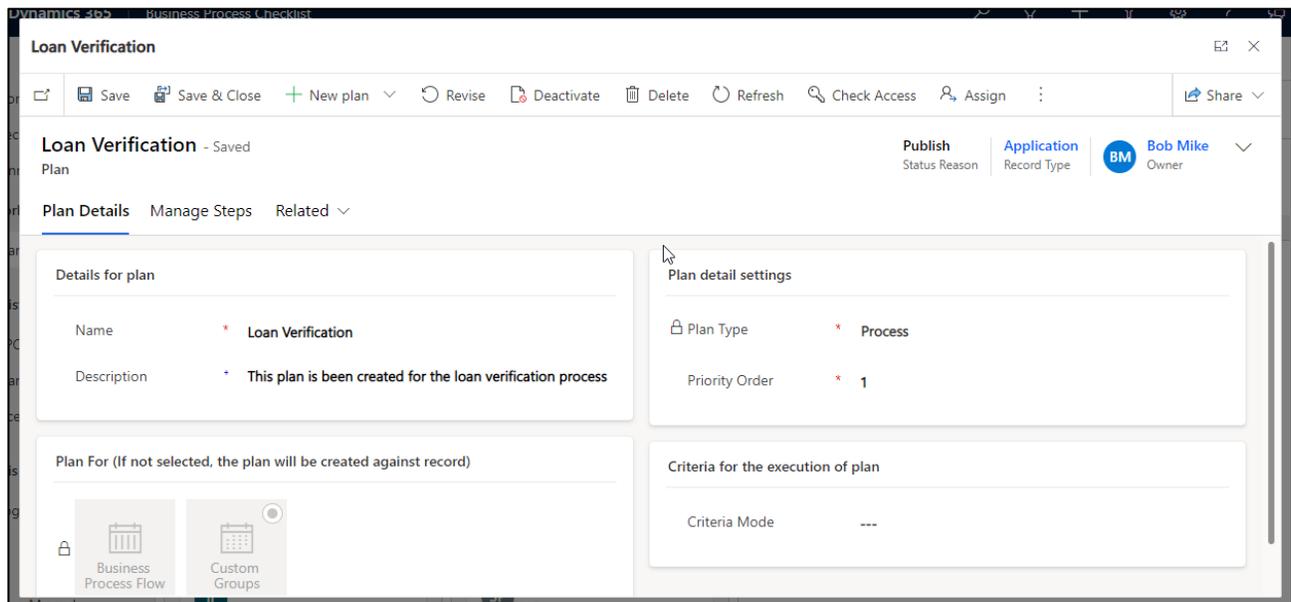


- Click on '**Work Plan**'.

## Business Process Checklist – User Manual



- Plan Detail will now get displayed.



### View Plan Items on Record

Once the conditions are satisfied, the plan will be automatically attached to the records and users can follow this plan while handling the records.

- **Plan items** will appear on the selected record as shown below. In addition, users can perform the various steps of the attached plan during the course of their day.

## Business Process Checklist – User Manual

The screenshot displays a CRM interface for a lead named Peter Henery. The top navigation bar includes options like Save, Save & Close, New, Delete, Refresh, Check Access, Qualify, Process, and Disconnect sequence. The lead's name and status (Lead) are shown, along with the owner's name, Sam Henderson. A progress bar indicates the lead is in the 'Qualify (8 D)' stage. The main content area is divided into three sections: Contact information (Topic: Osmois System, First Name: Peter, Last Name: Henery, Job Title: SE), a Timeline showing an email from Sam Henderson dated 6/28/2022 7:59 PM, and a Business Process Checklist. The checklist is titled 'Business Process Checklist' and is part of a 'Work Plan: Lead Nurturing'. It shows a progress bar at 33% and three items: 'Send introduction mail' (checked), 'Verify detail' (unchecked), and 'Setup demo call' (unchecked). The 'Verify detail' item has a description: 'Thank for the interest and take the product/services and the team...'. The interface also shows a navigation bar with stages: Qualify (8 D), Develop, Propose, and Close.

## Data Migration

Managers can migrate the already created configurations, plans, plan steps and plan step actions from one environment to another instead of manually creating the same configurations in another environment of their choice.

How to migrate configurations, plans, plan steps, and plan step actions from one environment to another. The process of migrating configurations from one environment to another can be divided into two parts:

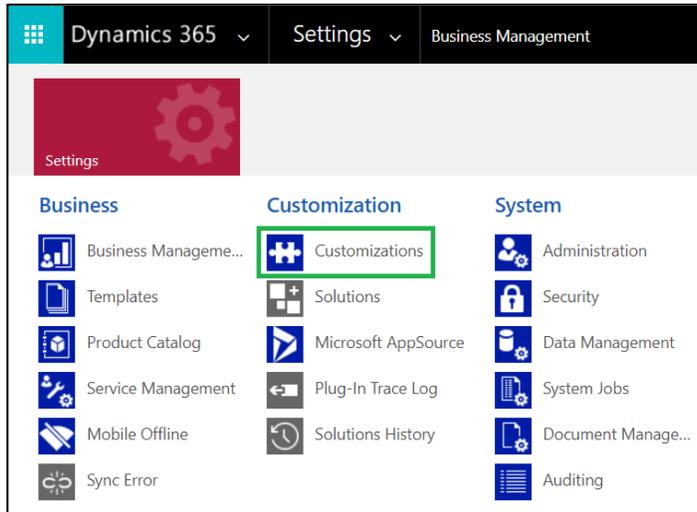
- Export configuration from one environment
- Import the same configuration into another environment

### Export configurations from one environment to another:

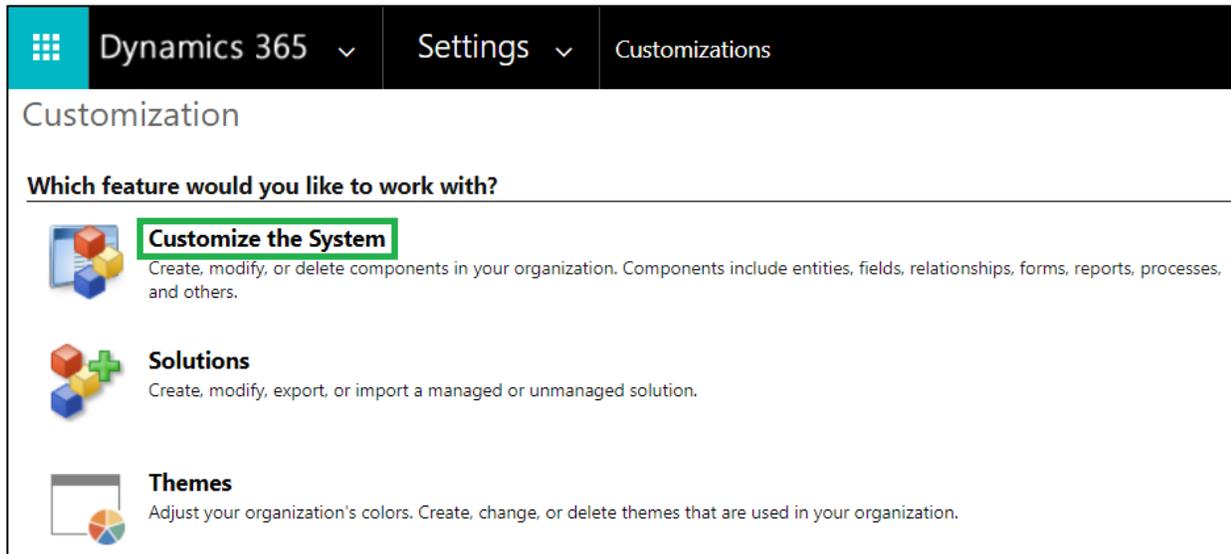
To export configurations from one environment to another follow the steps given below:

Before exporting the configurations, create a **custom view** on '**Business Process Checklist configuration**' in the environment from which the configuration is to be moved in the following way:

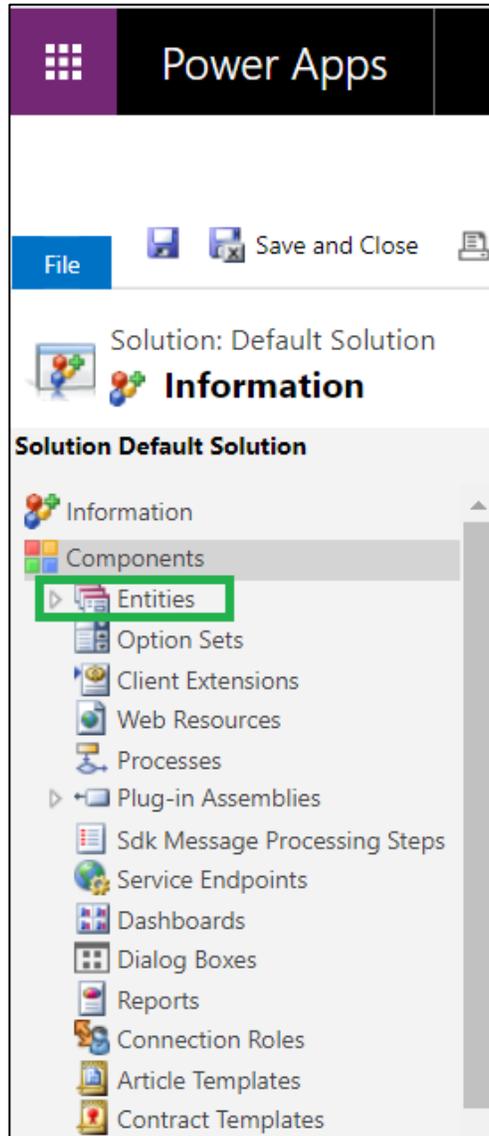
- Navigate to **Settings --> Customizations**.

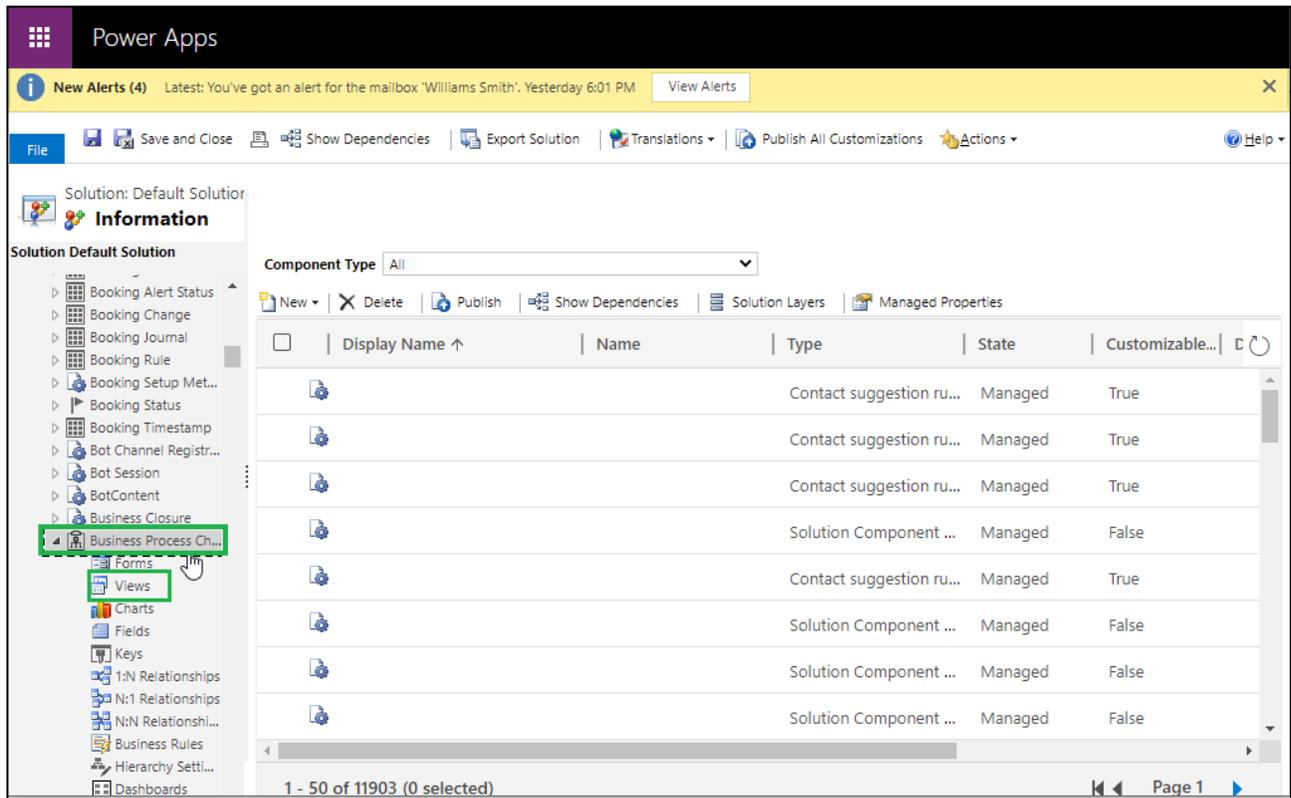


- Click on '**Customize the System**'.

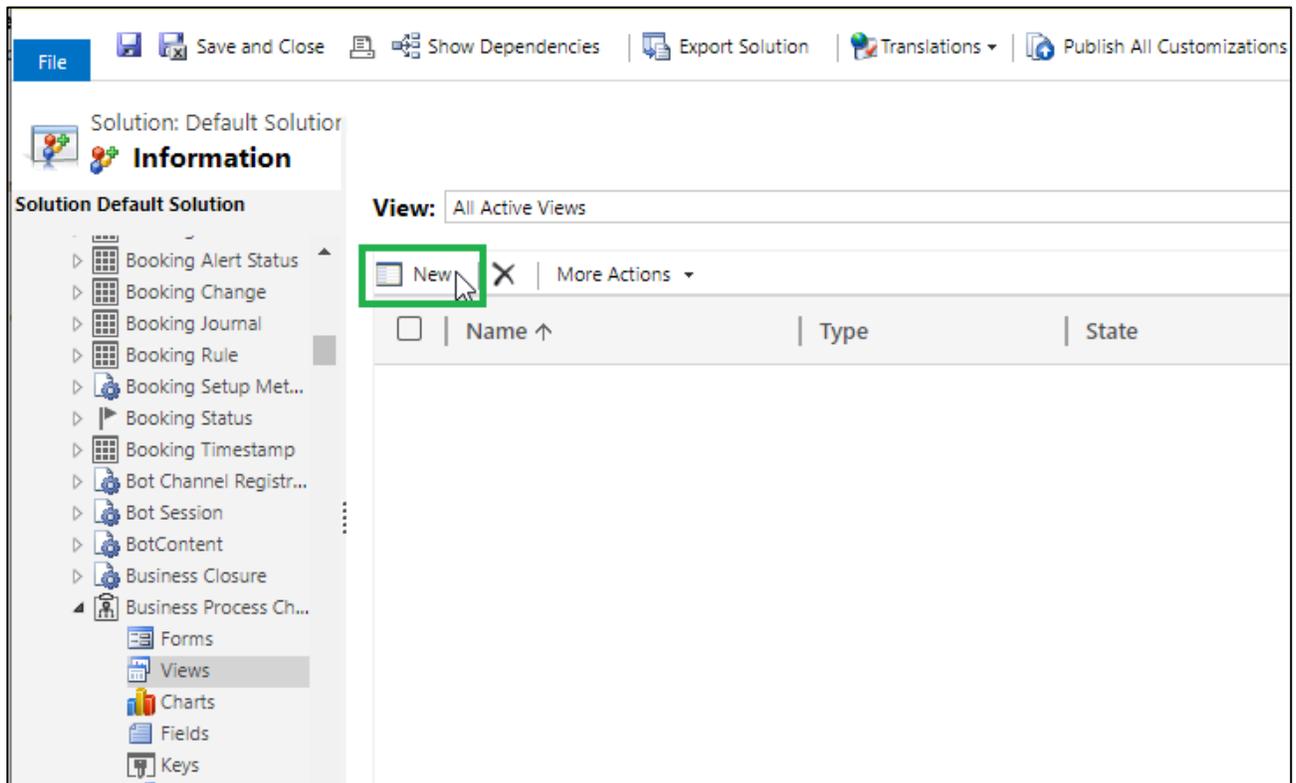


- Navigate to **Entities** --> **Business Process Checklist** --> **Views**.

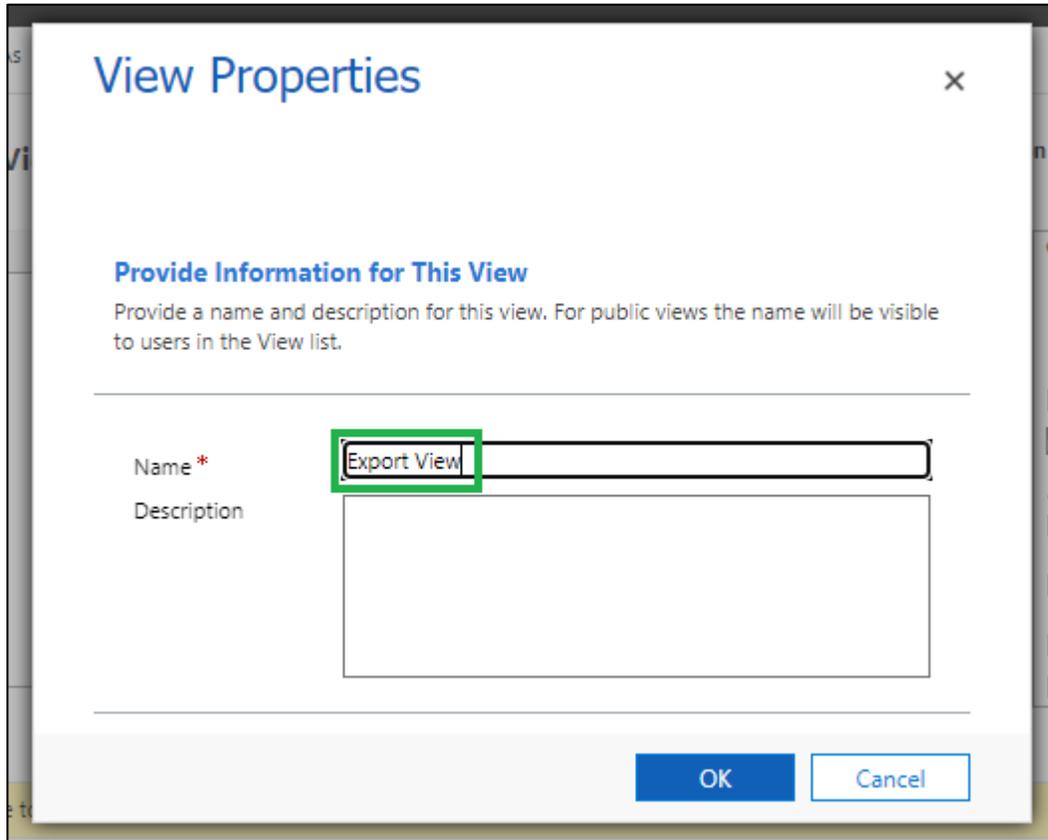




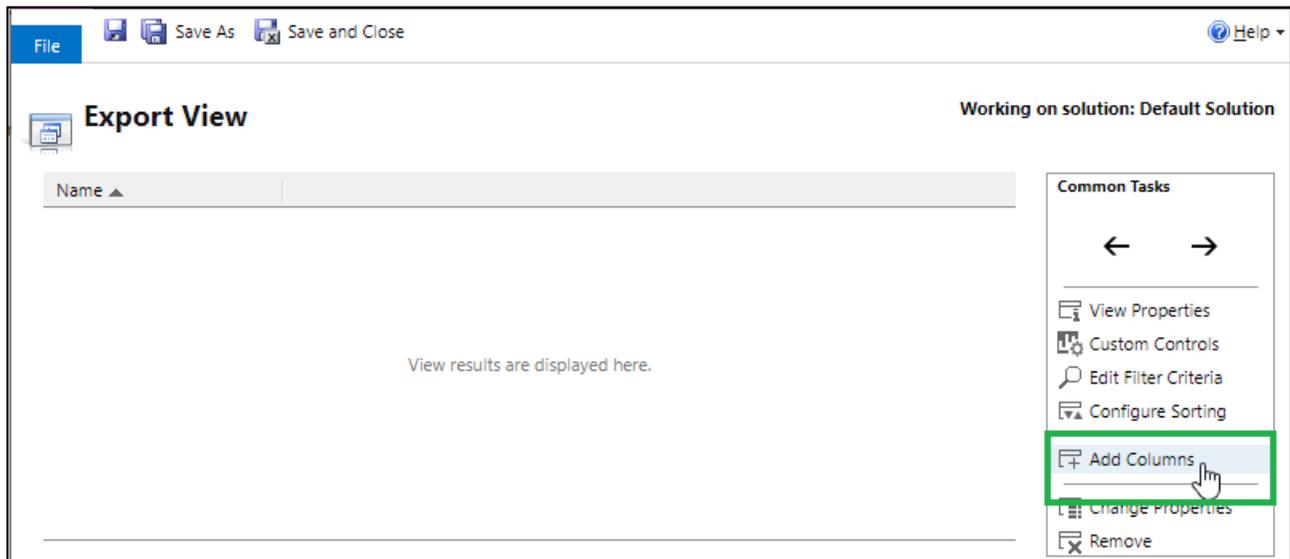
- Click on 'New' to create a new view.



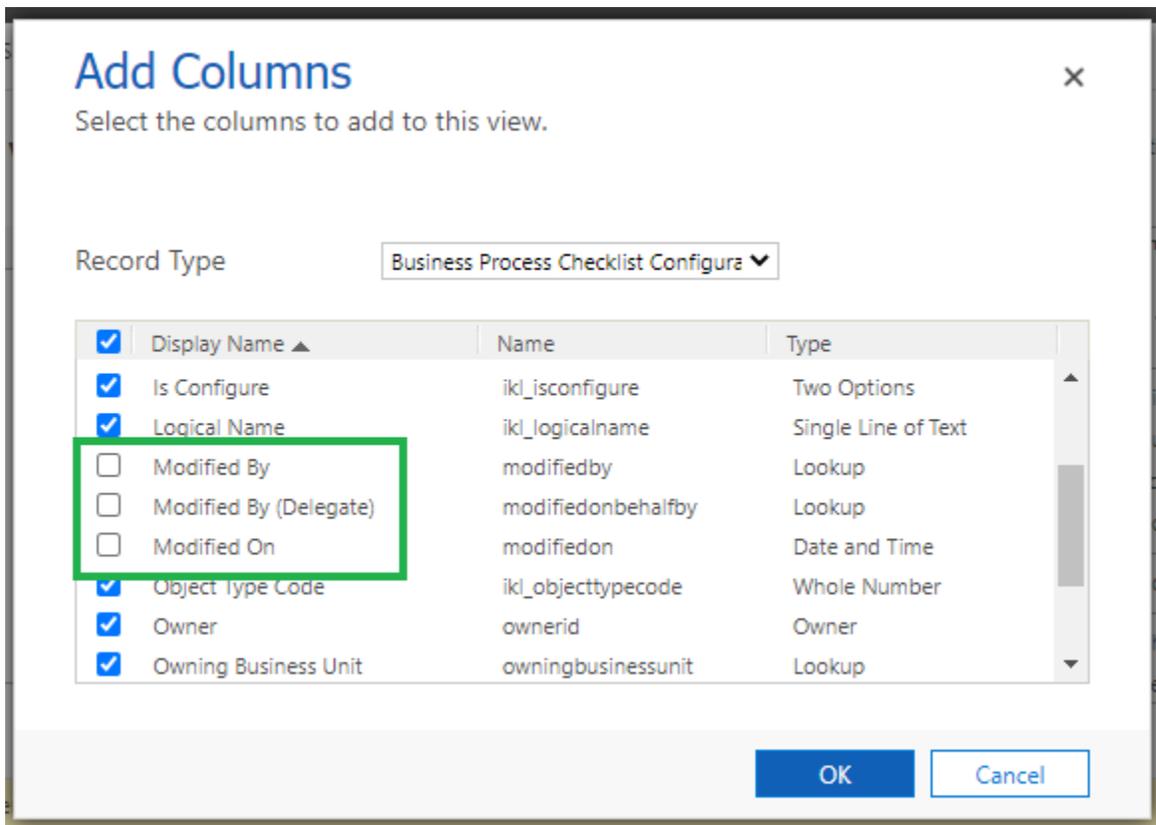
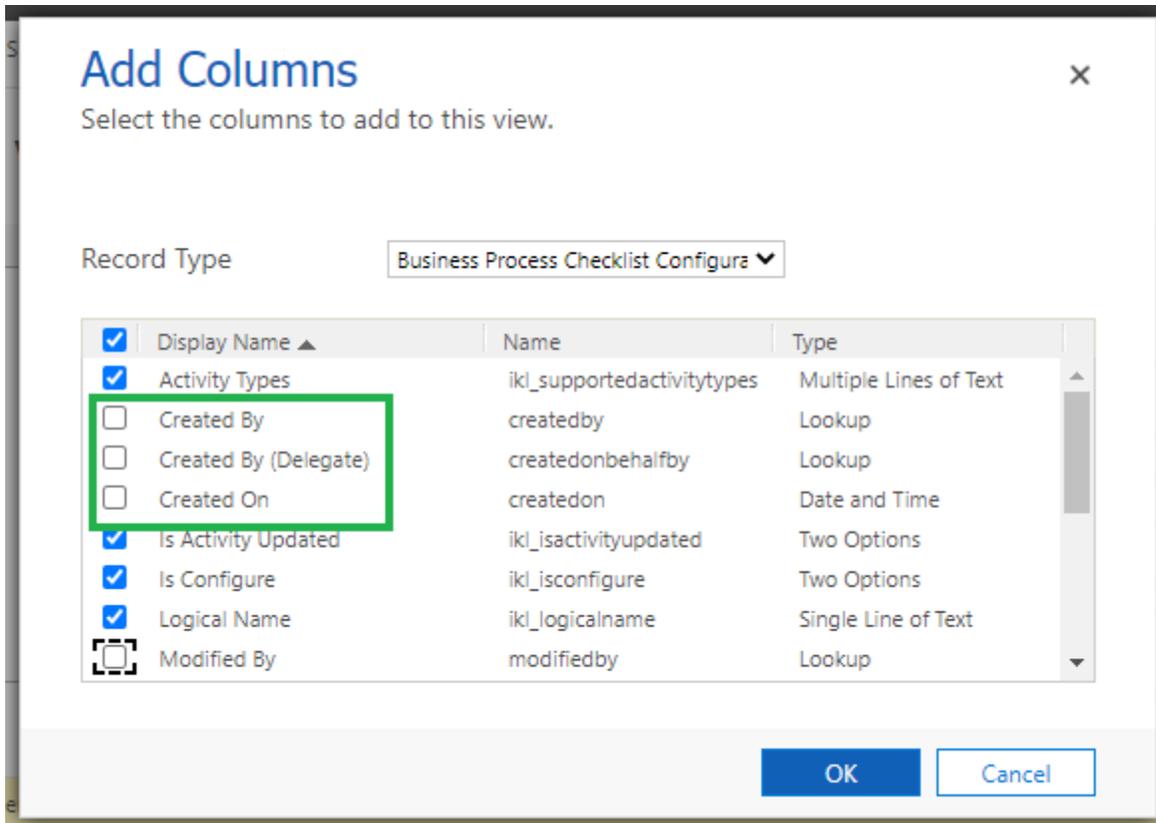
- Enter an appropriate name for the view and click 'Ok' to proceed.

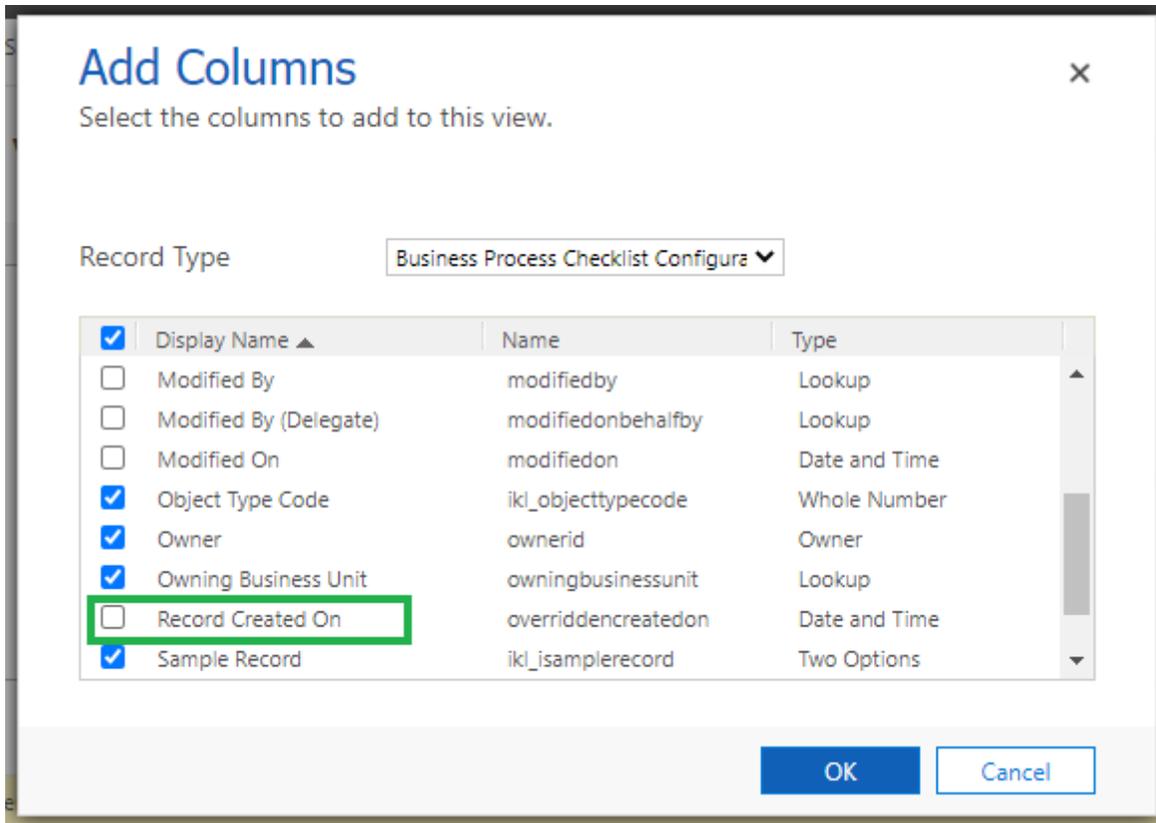


- Click on 'Add Columns'.

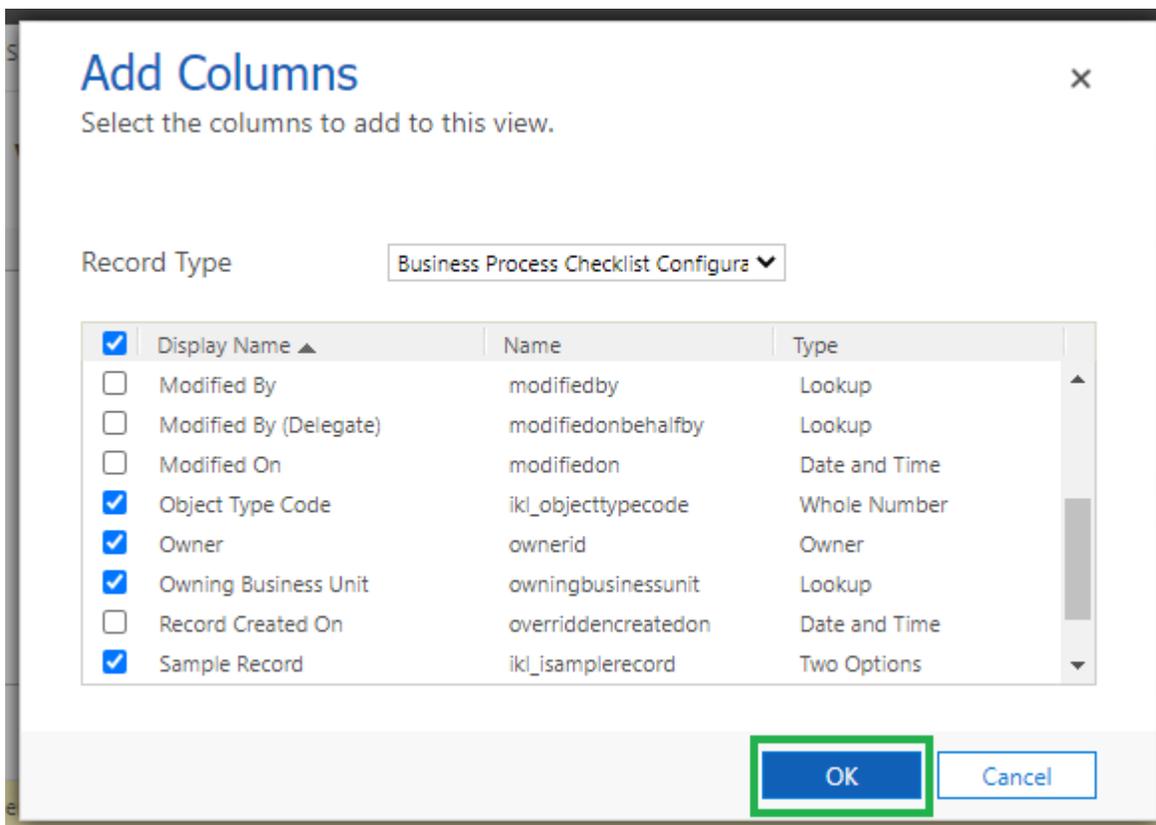


- You can keep the following column names disabled - **Created by, Created by (Delegate), Created on, Modified by, Modified by (Delegate), Modified on and Record created on.**

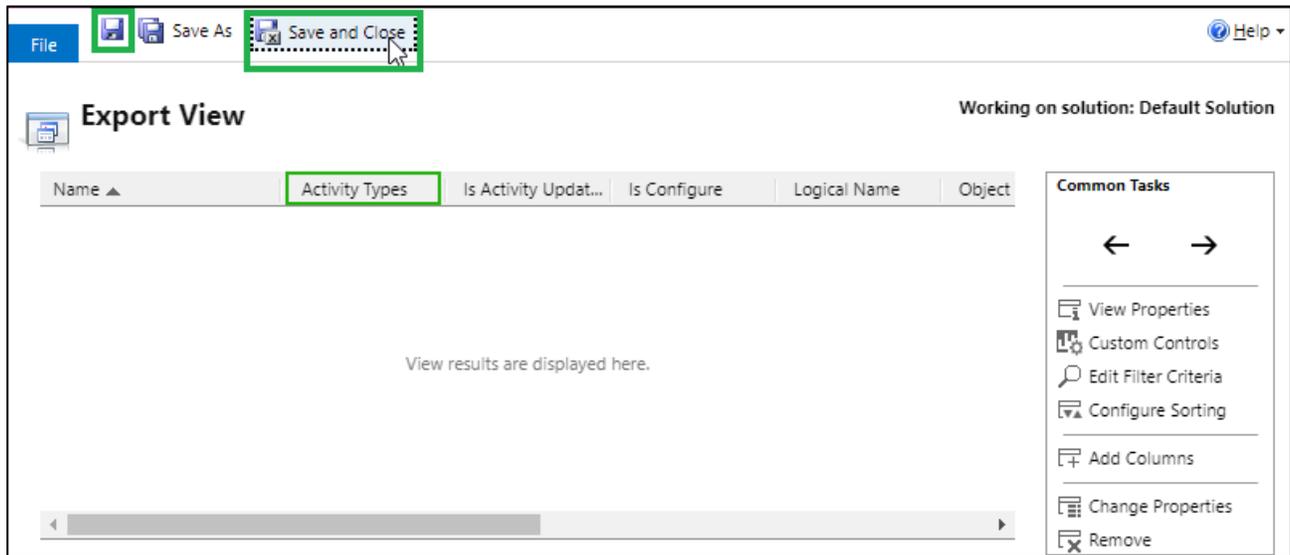




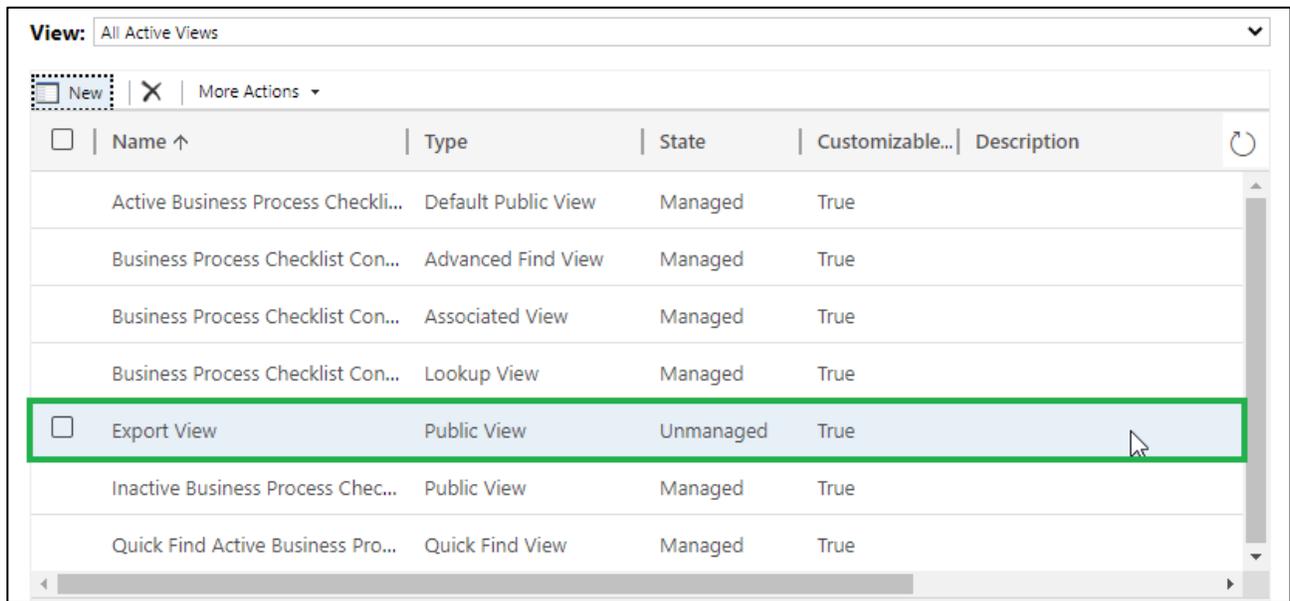
- Click 'OK' to proceed.



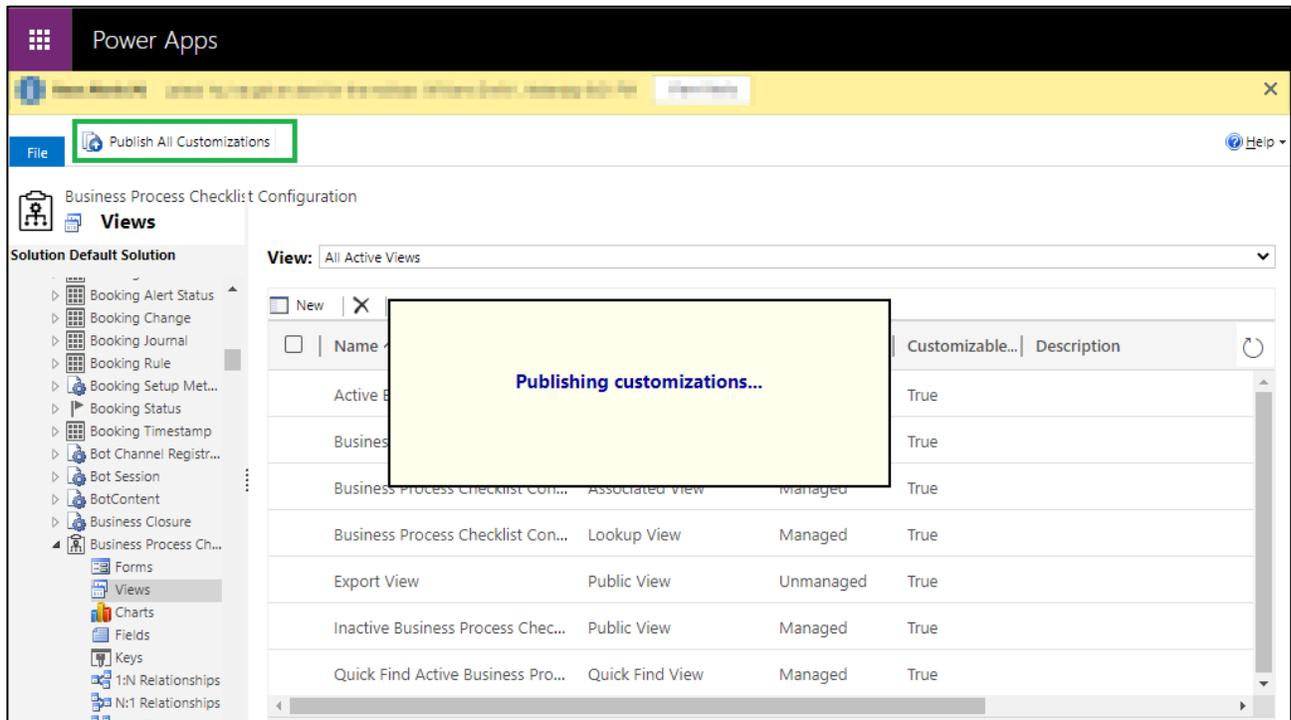
- Click 'Save/Save & Close' icon to save this view.



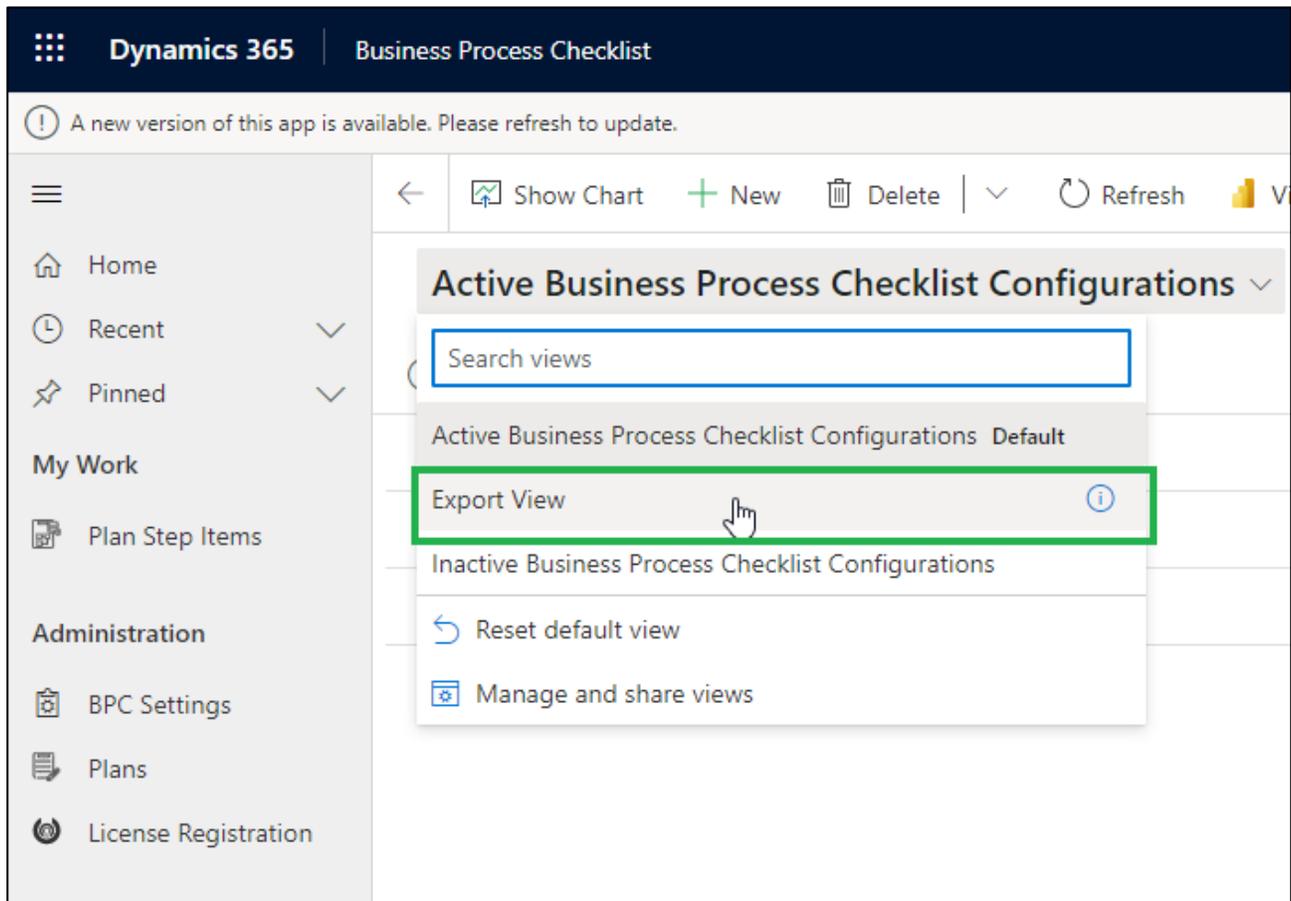
- You can see the view that has just been added.



- Click on 'Publish All Customizations'.

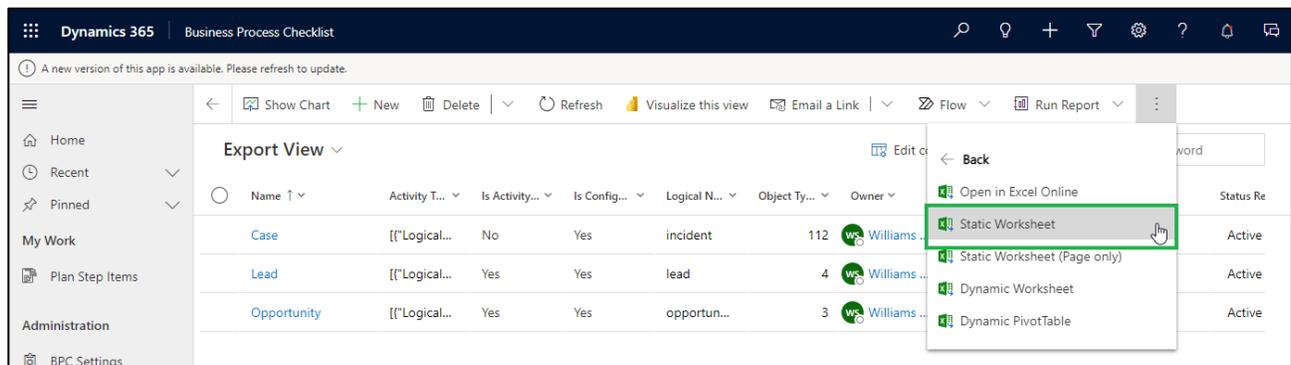
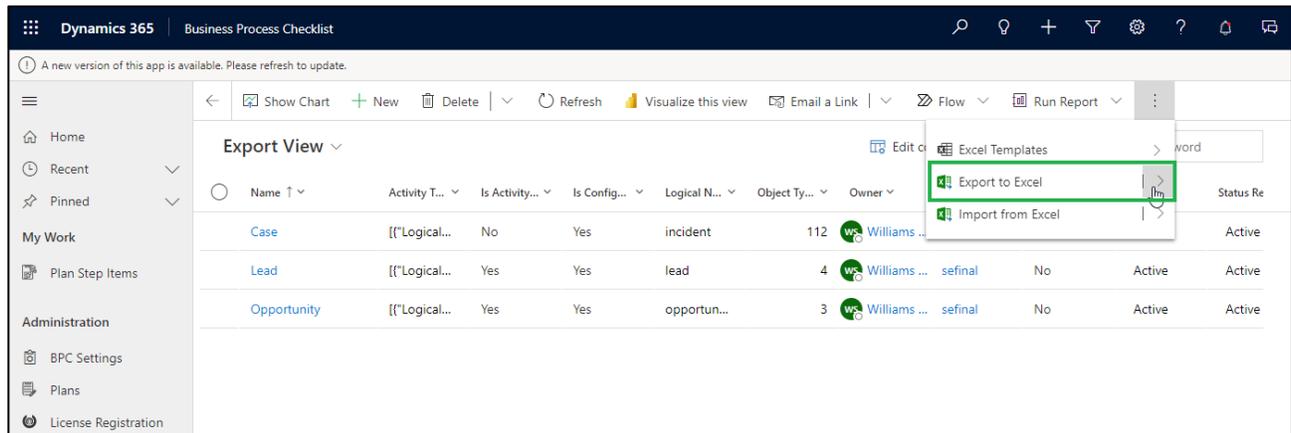


- Go back to **Business Process Checklist** application --> **Business Process Checklist Configurations** --> Select the **Export View**.



## Business Process Checklist – User Manual

- Click on 'Export to Excel'.



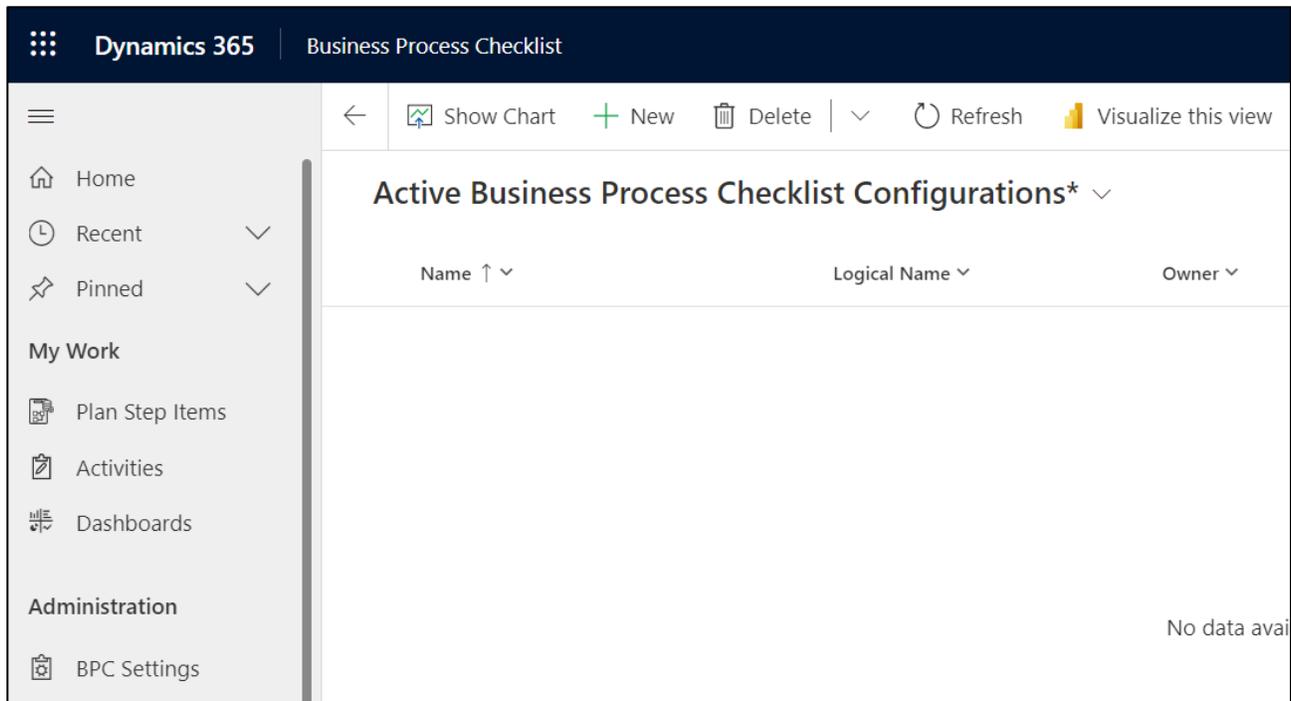
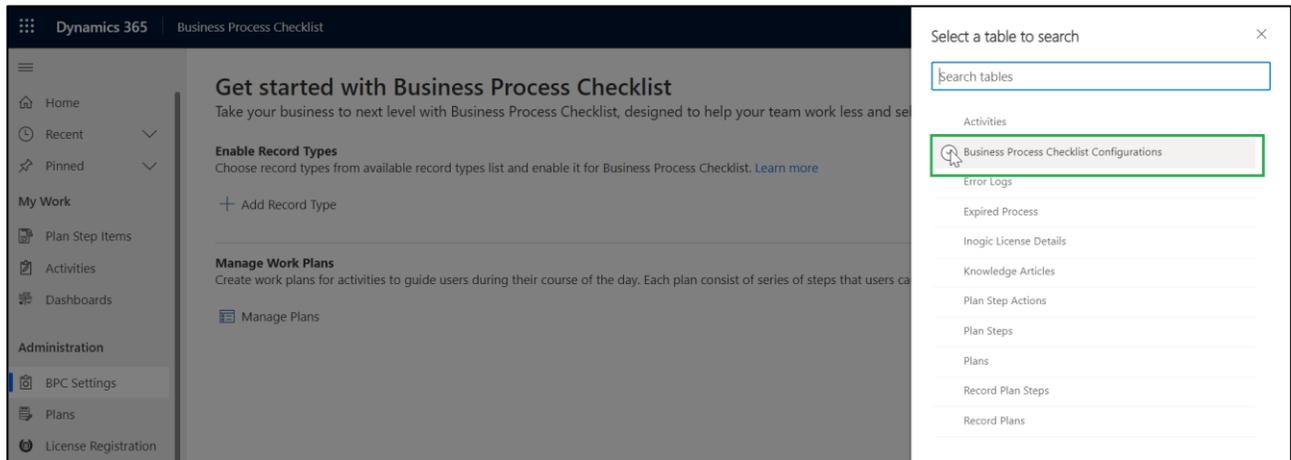
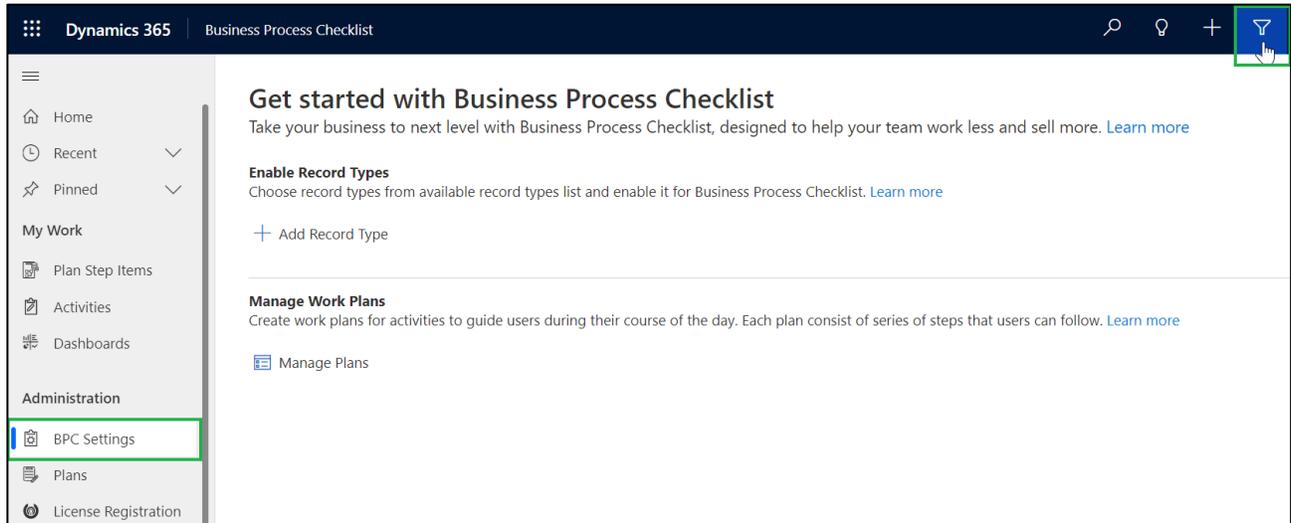
- After clicking on 'Export to Excel', file with an extension '.xlsx' will be downloaded. **Open** this file and **save** it as **.csv** format in the system.
- Click '**OK**'.
- Once you have successfully created the .csv version of the exported file, let's proceed to import operation.

### Import the same configuration in another environment:

To import the same configuration in another environment, follow the simple steps given below:

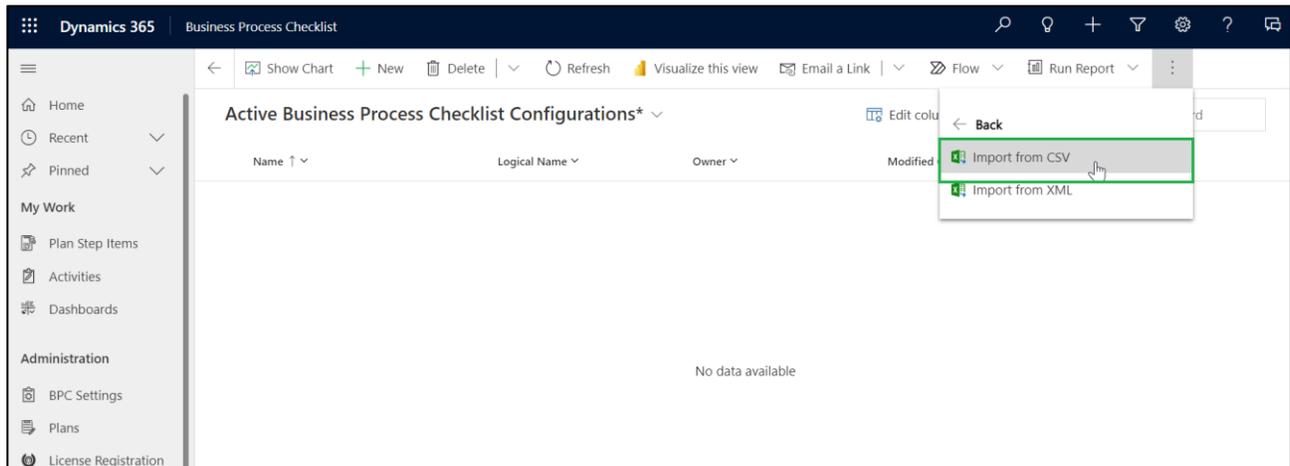
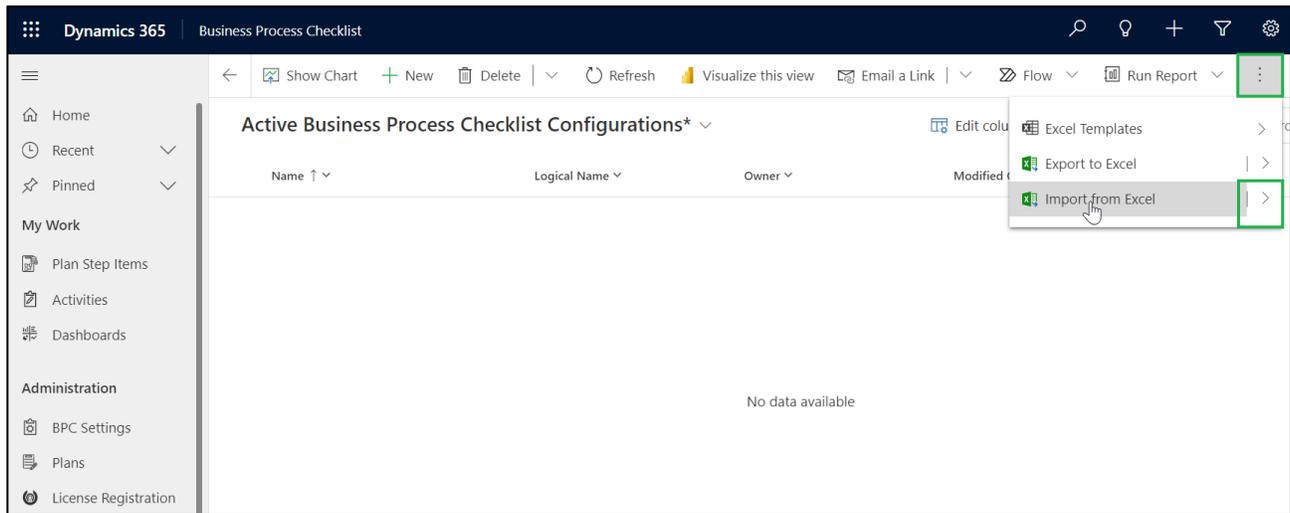
- Login to the other environment to which we want to import the template --> Navigate to **Business Process Checklist** application --> **BPC Settings** --> **Business Process Checklist Configurations**.

# Business Process Checklist – User Manual



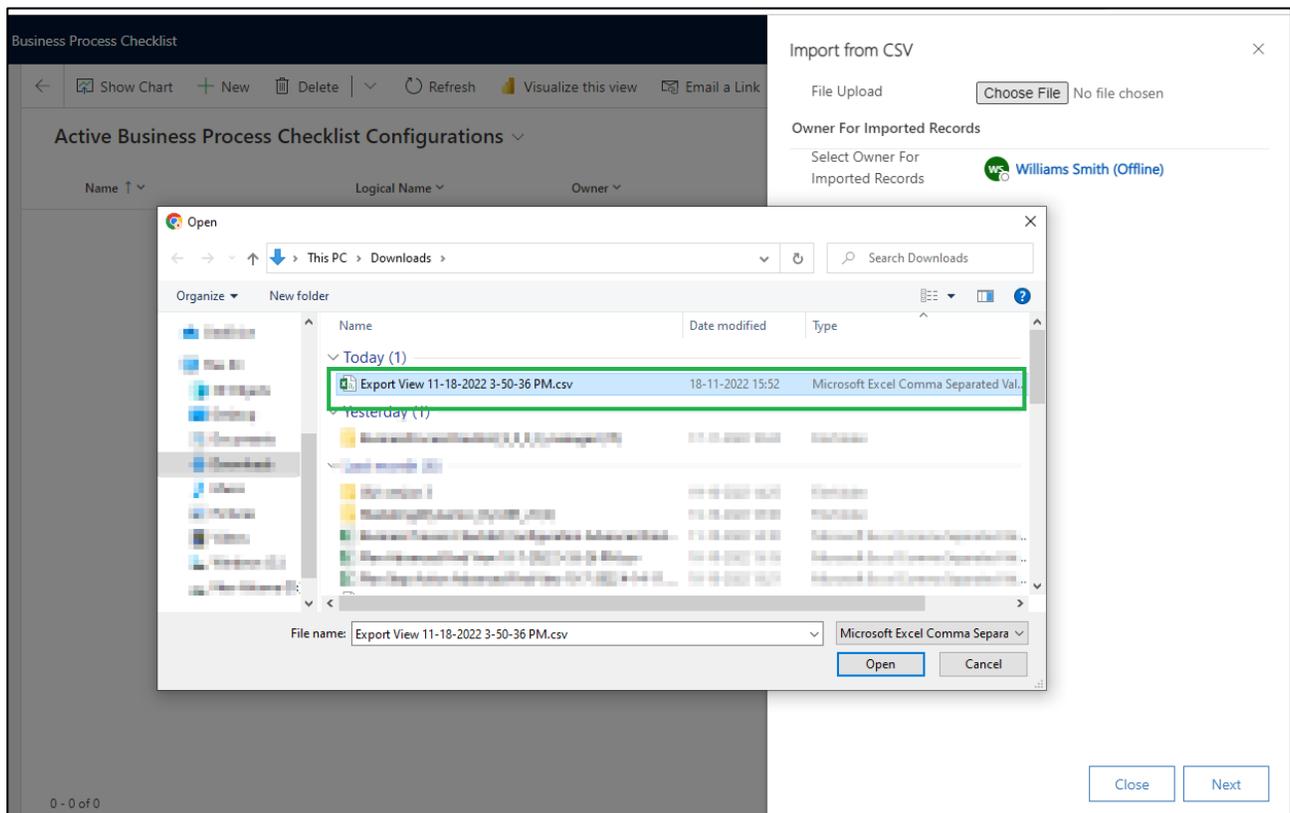
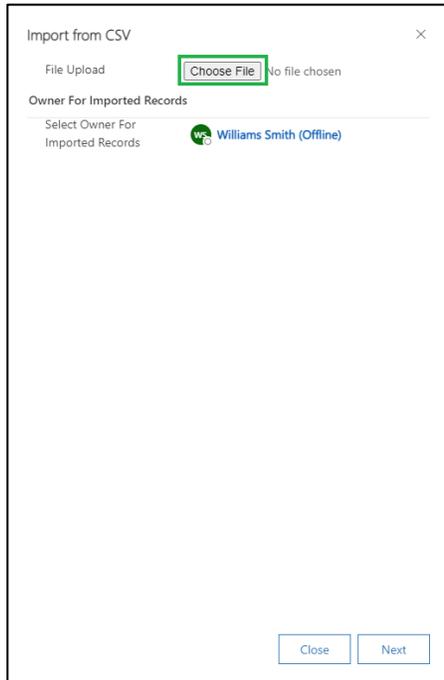
## Business Process Checklist – User Manual

- **Import the same .csv file.**



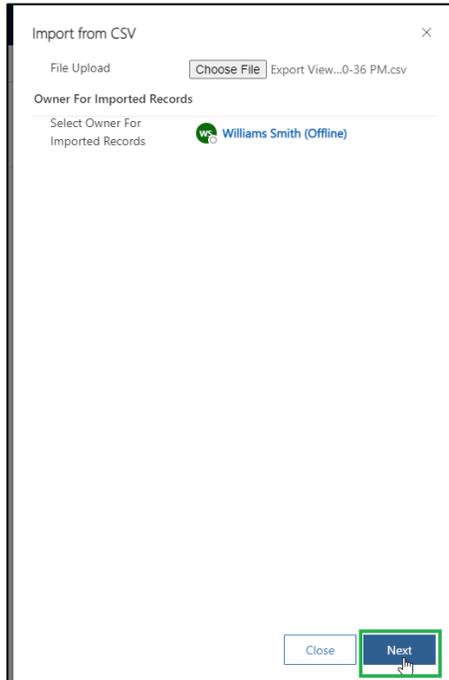
- Click on **Chose File** and Browse the **.csv** file.

## Business Process Checklist – User Manual

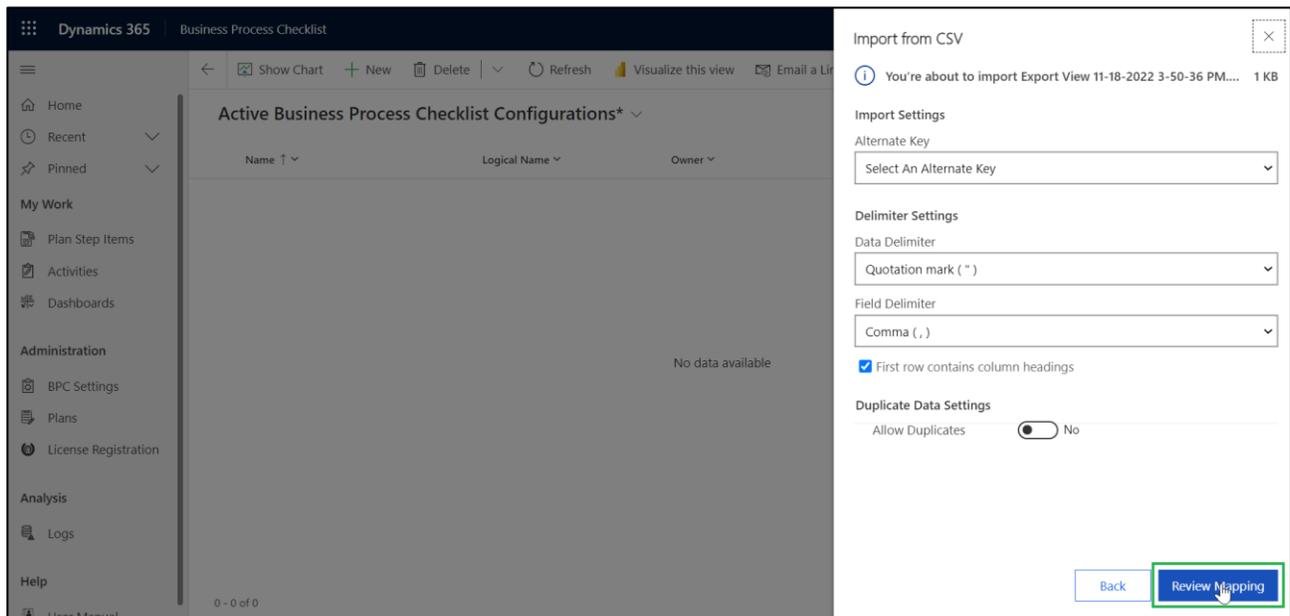


- Click on **NEXT**.

## Business Process Checklist – User Manual

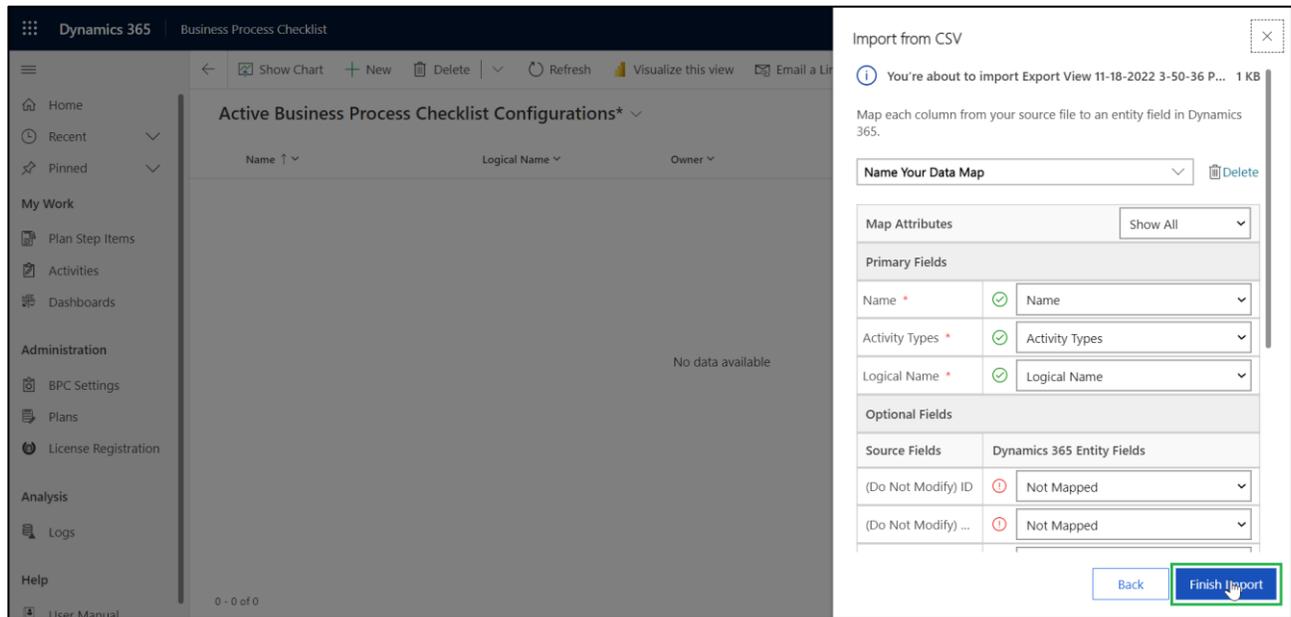


- Click on **Review Mapping**.

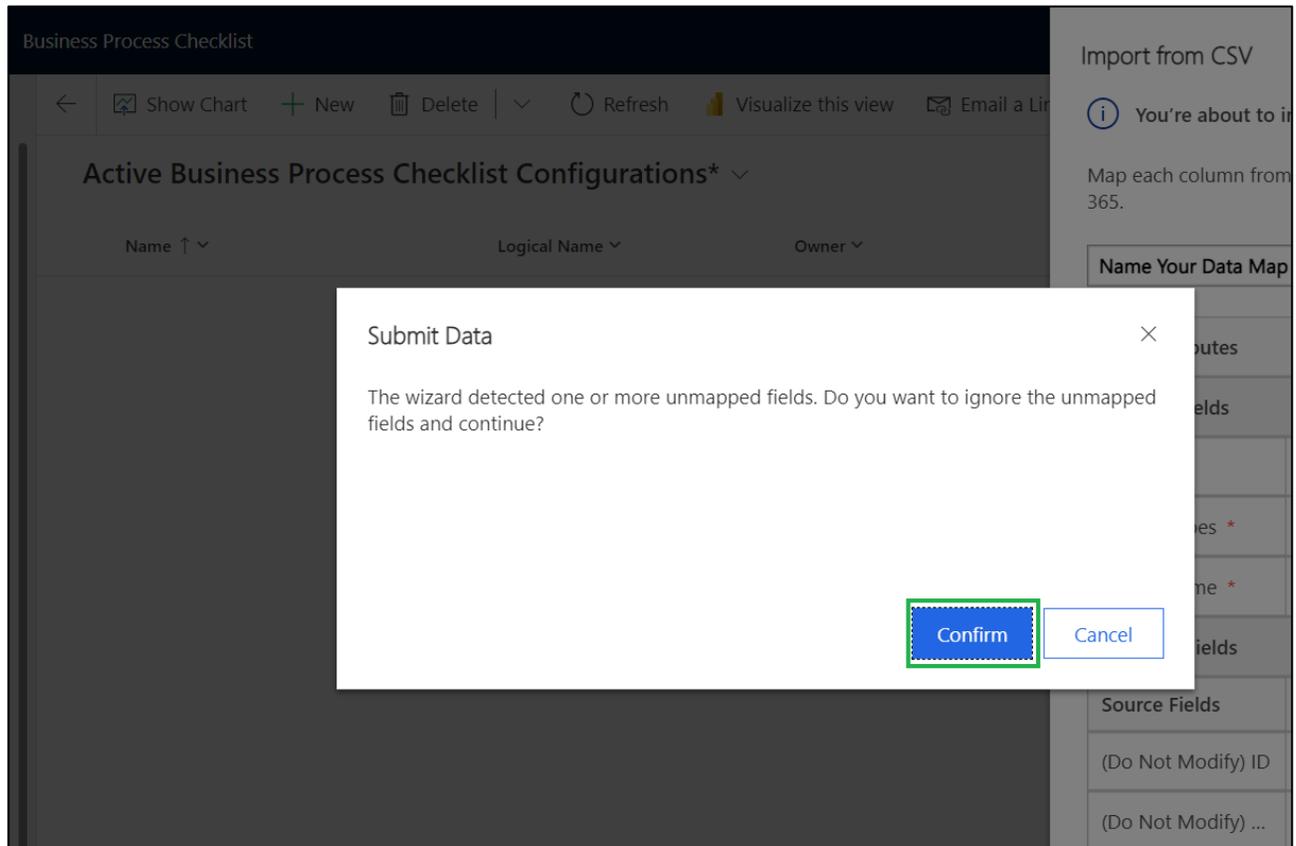


- Click '**Finish Import**' without changing any of the below fields.

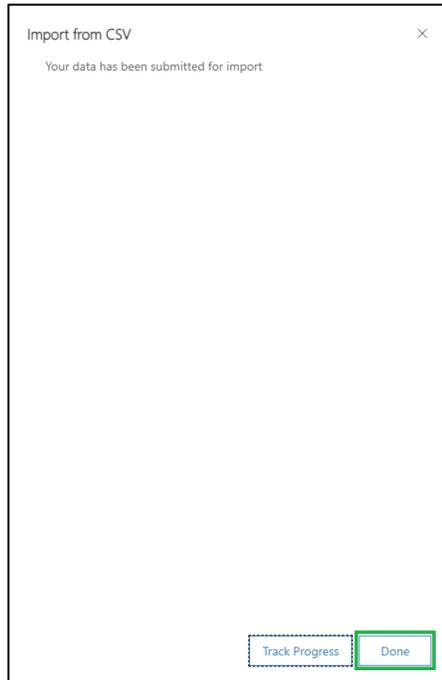
## Business Process Checklist – User Manual



- Click on **Confirm**.



- Click on **Done**.



In this way, users can export configuration from one environment and Import the same configuration into another environment.

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## Contact Us

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**Twitter:** @inogic