Business Process Checklist

inogic

User Manual

Contents

Introduction

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.

Security Roles

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.

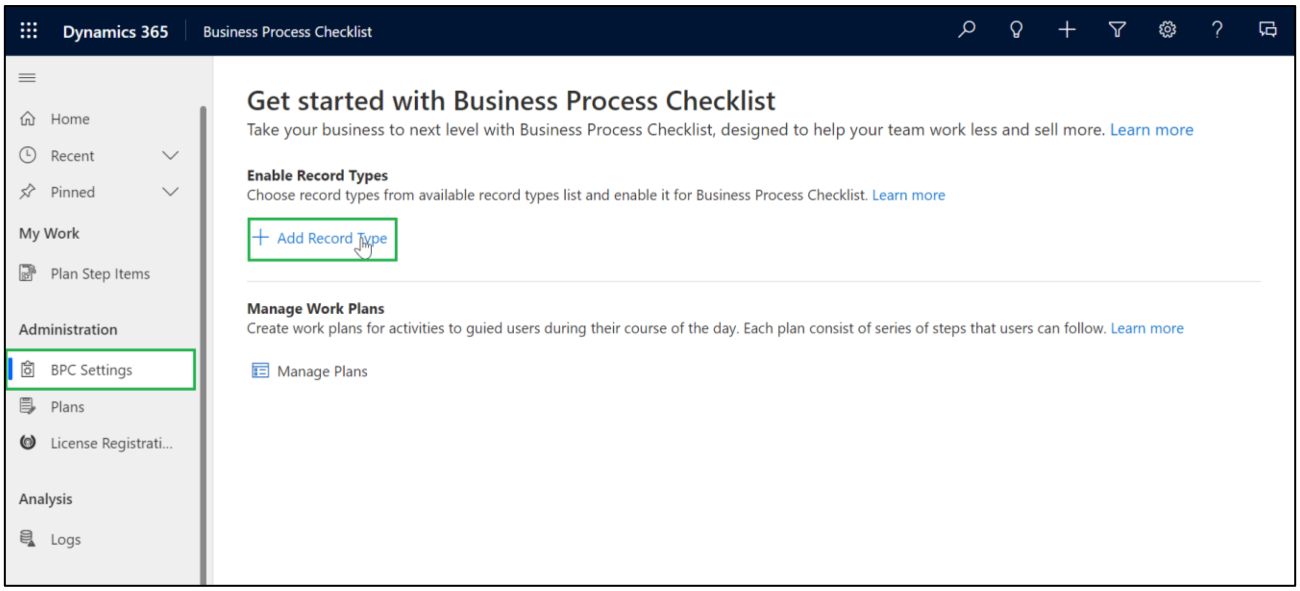
Note: The entities (Record Types) can be enabled only by the Business Process Checklist Administrator.

Enable Record Type

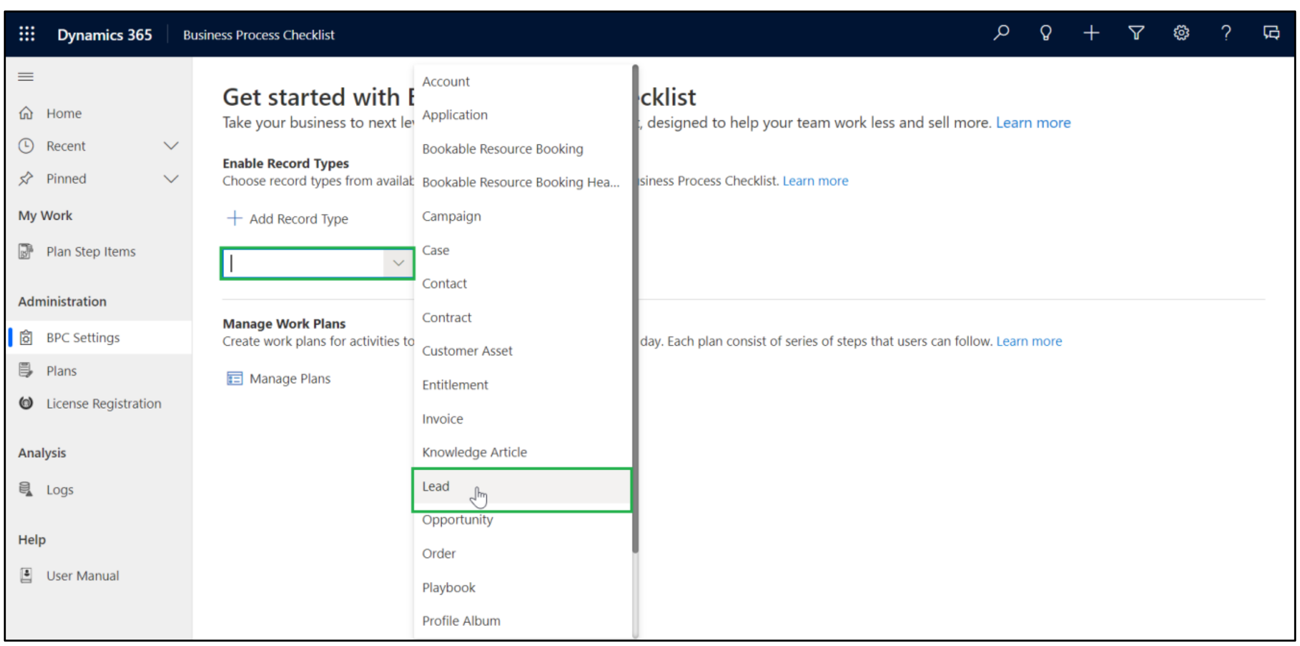
Enabling **Record Type** is essential for creating and managing plans in the Business Process Checklist App. Without enabling record types, you will not be able to create plans for specific records in Dynamics 365 CRM.

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.**

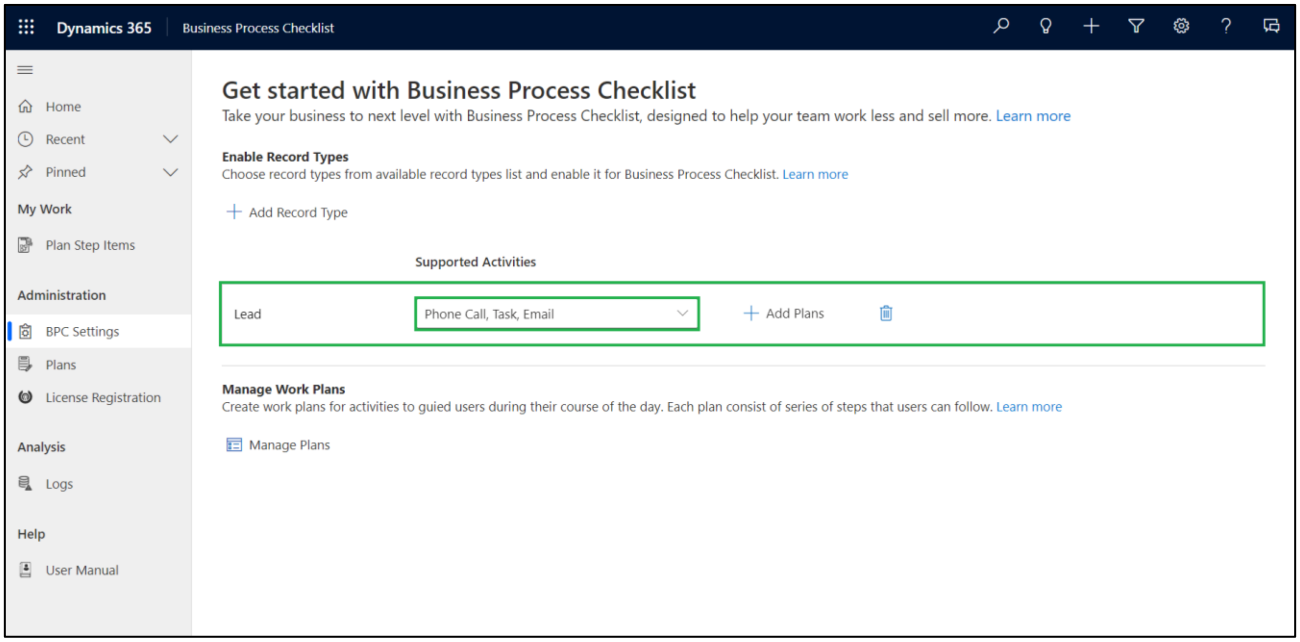


- Select the required **Record Type** from the appearing menu to enable it.

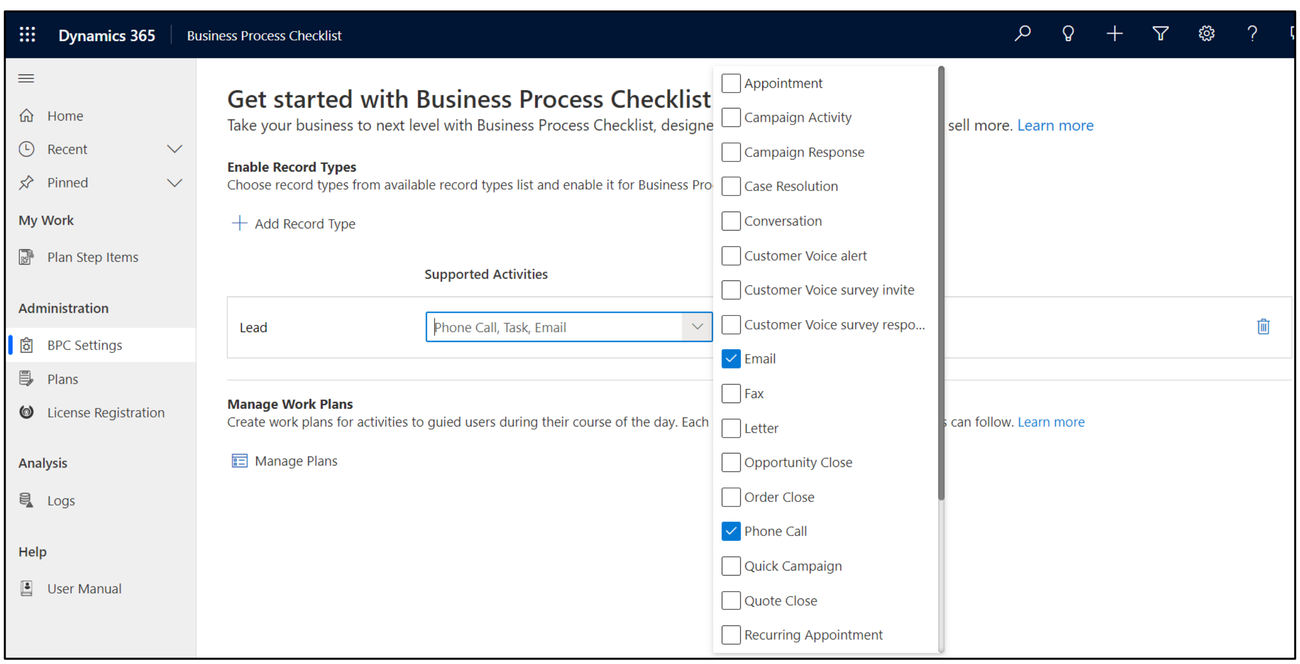


- Now your **Enabled Record Types** will appear below, along with **Email, Phone Call & Task,** which are the three default supported activities.

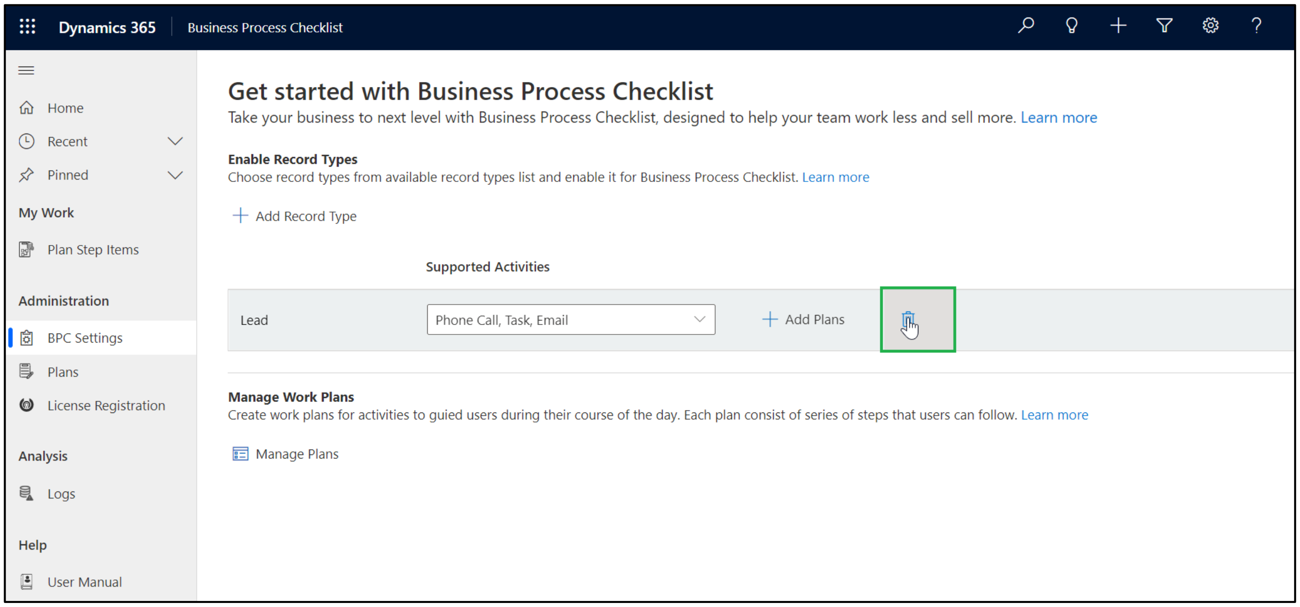
Note: Supported activities are activities through which tasks in the plan can be performed. For example, making a phone call to verify lead details in the lead nurturing plan.



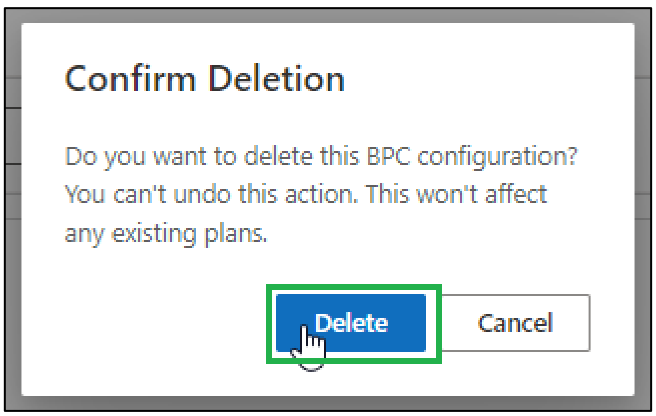
- Check or uncheck the supported activities as per business requirements.



- 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.

Create Plan

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.

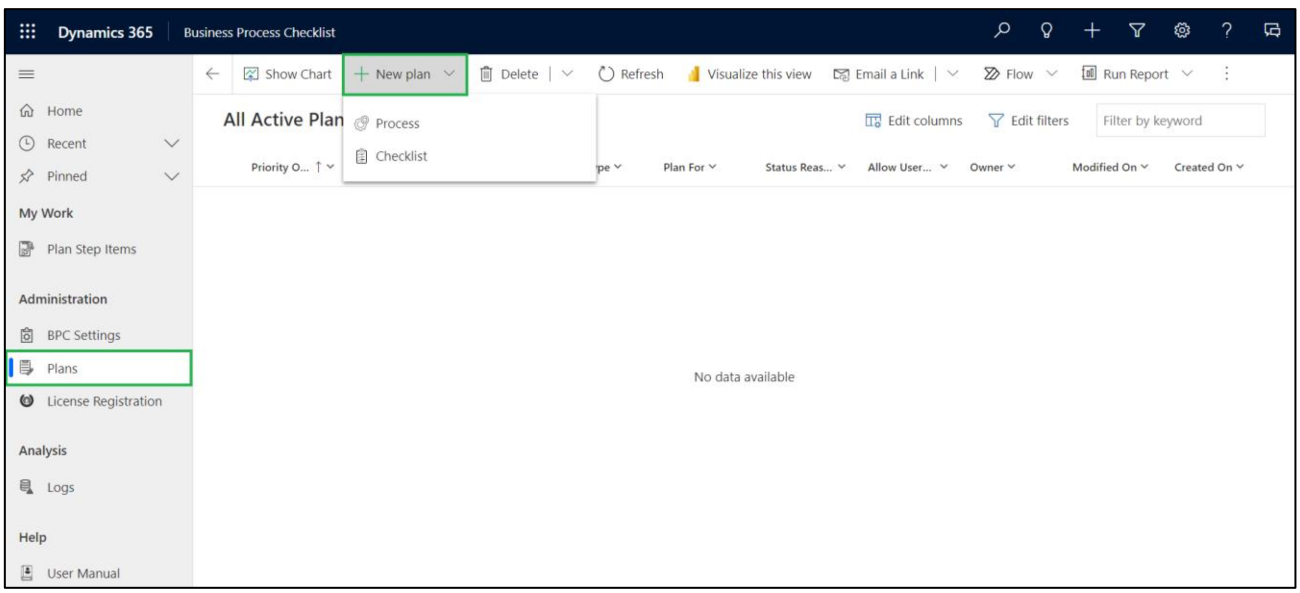
This is useful for creating plans where you want your salesperson to follow the guidelines in a predefined order and not randomly.

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

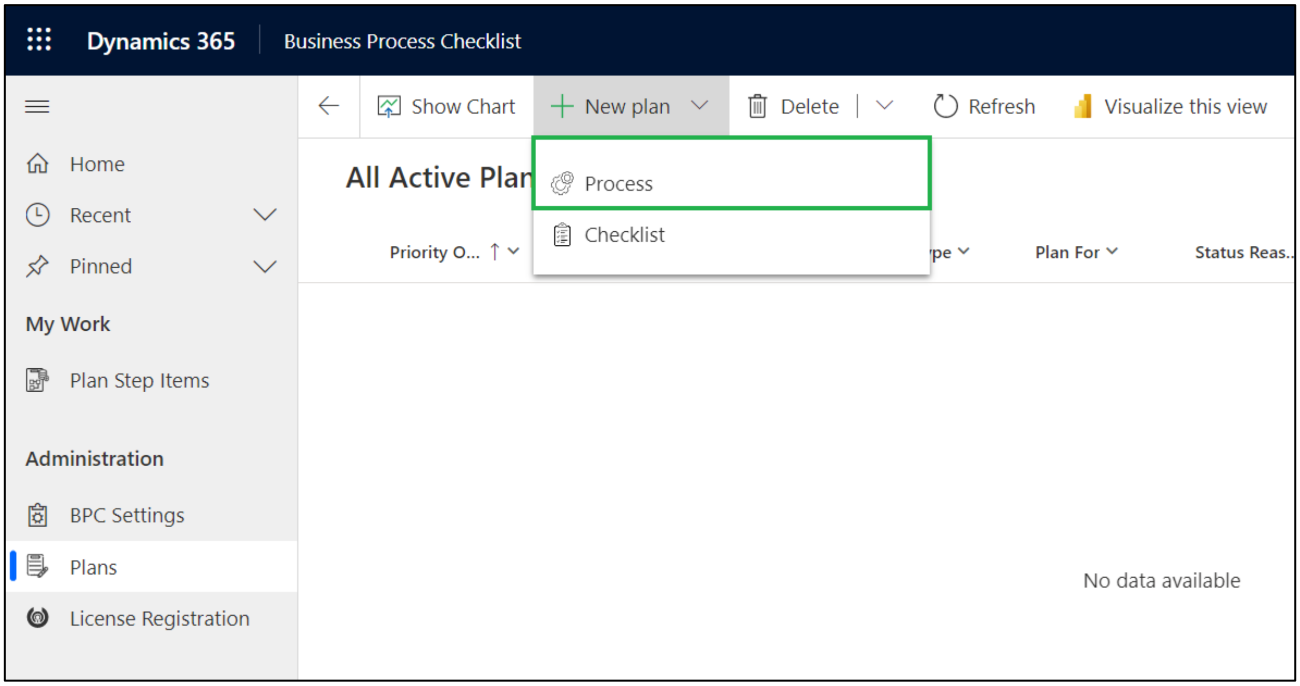
Plan

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.

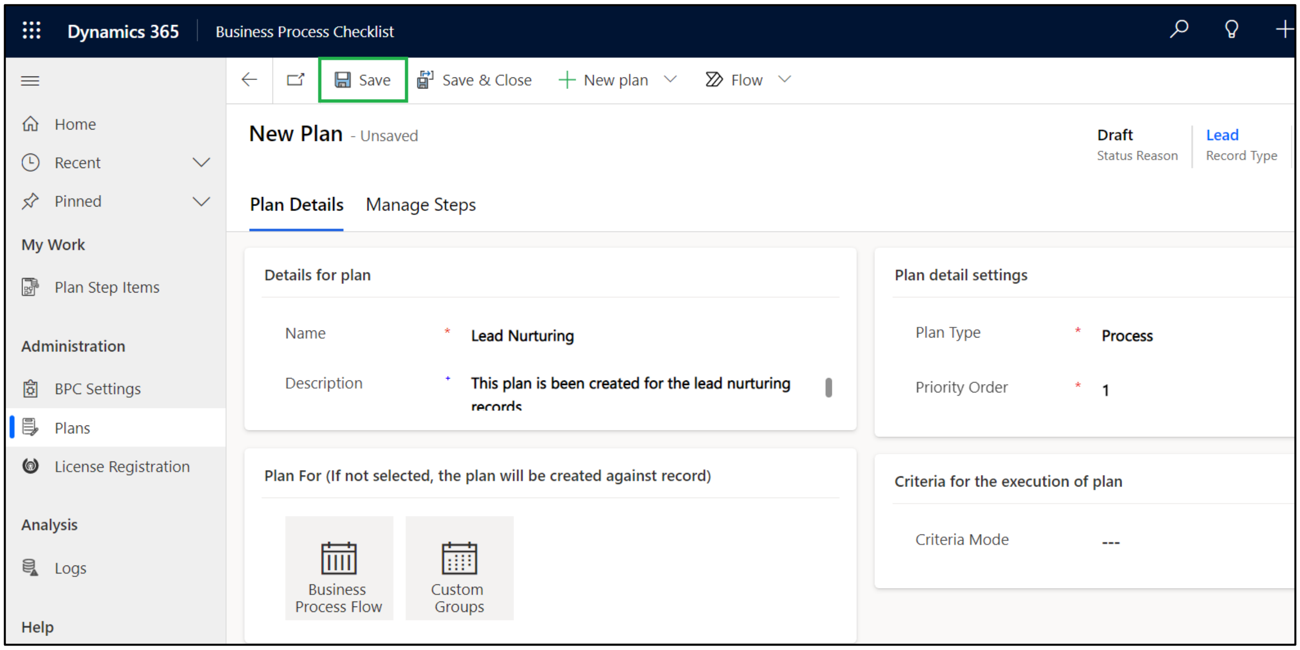
- Navigate to **Business Process Checklist App --> Plans --> New Plan.**



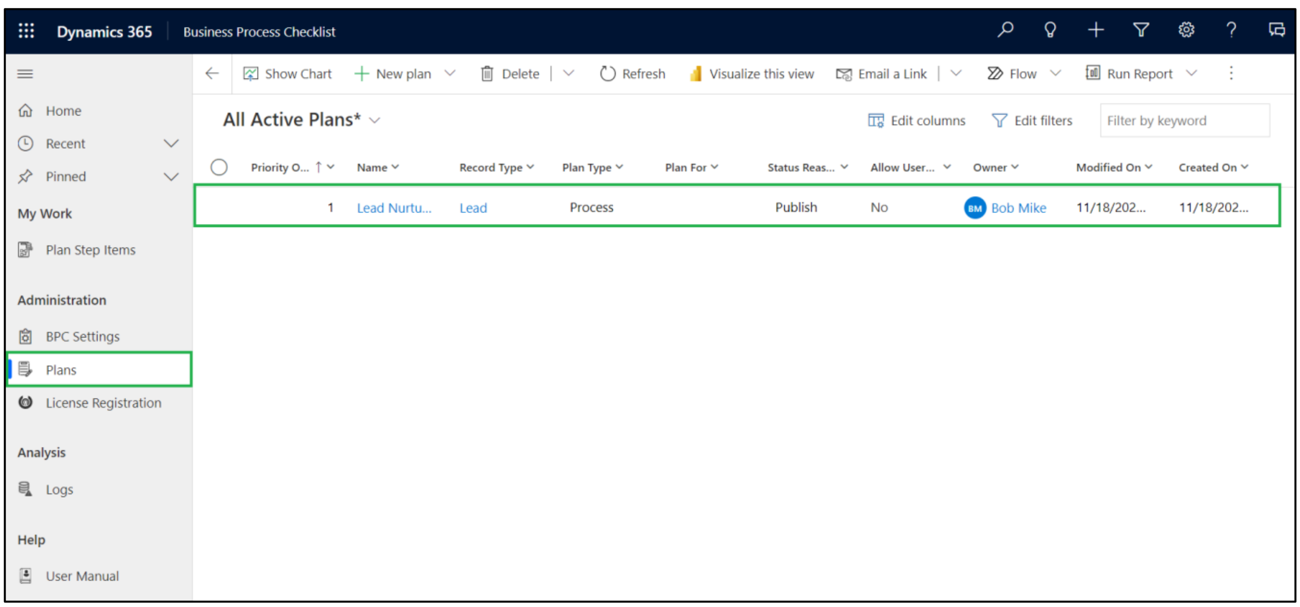
- Click on the '**New plan'** button and select **Process.**



- 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'**.



- 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.

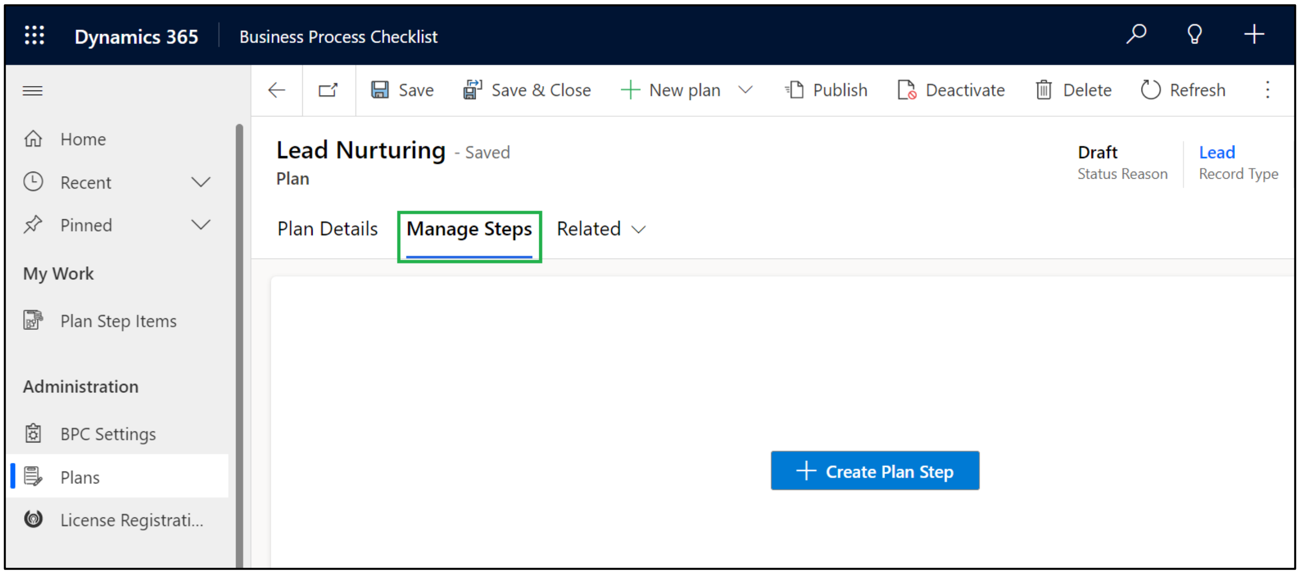
Plan Steps

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

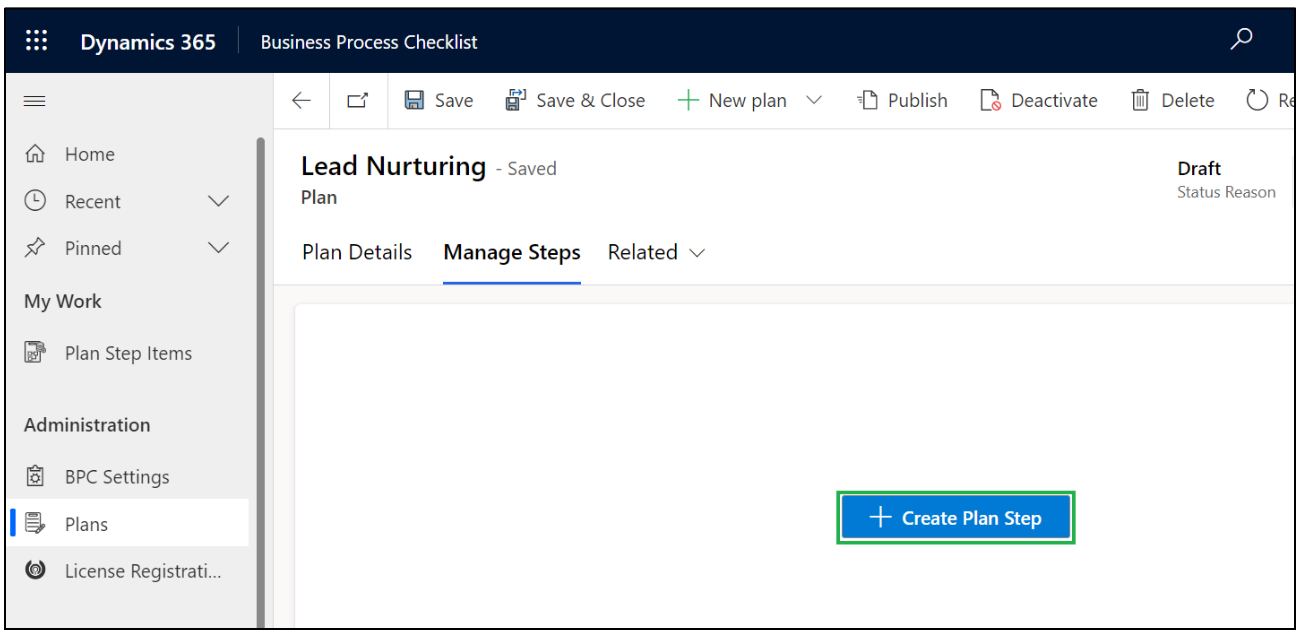
Plan steps help managers define what a task is, why it needs to be performed, and how to perform it.

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

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



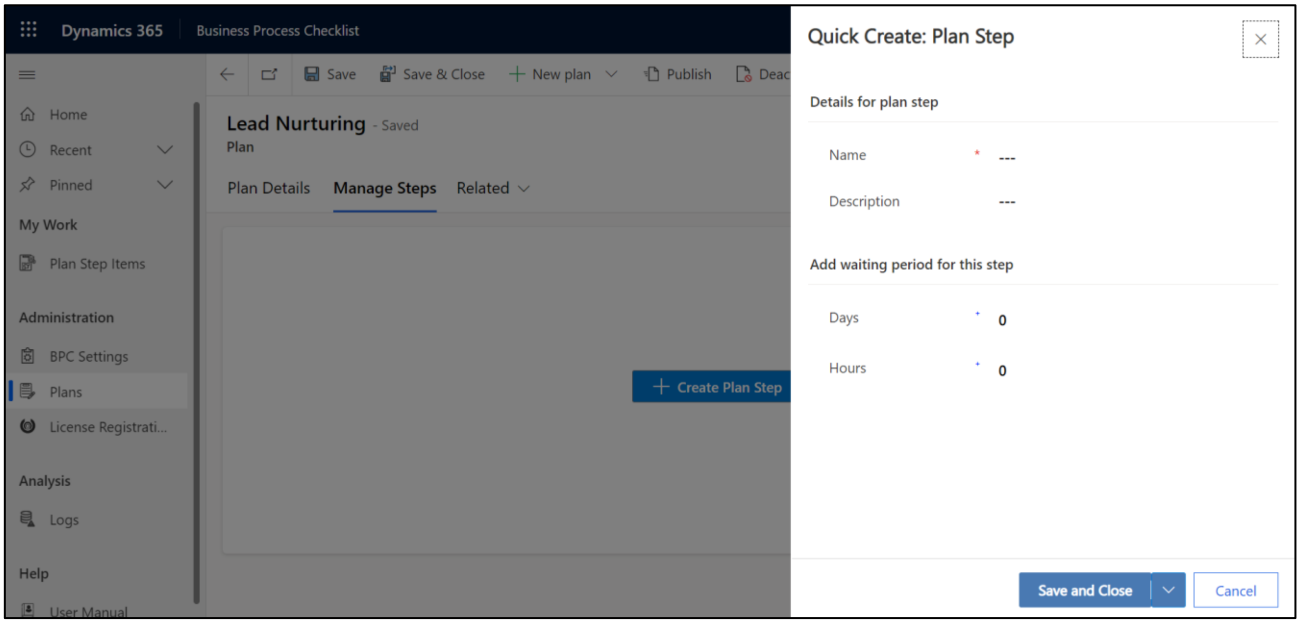
- Click on the **Create Plan Step** button.



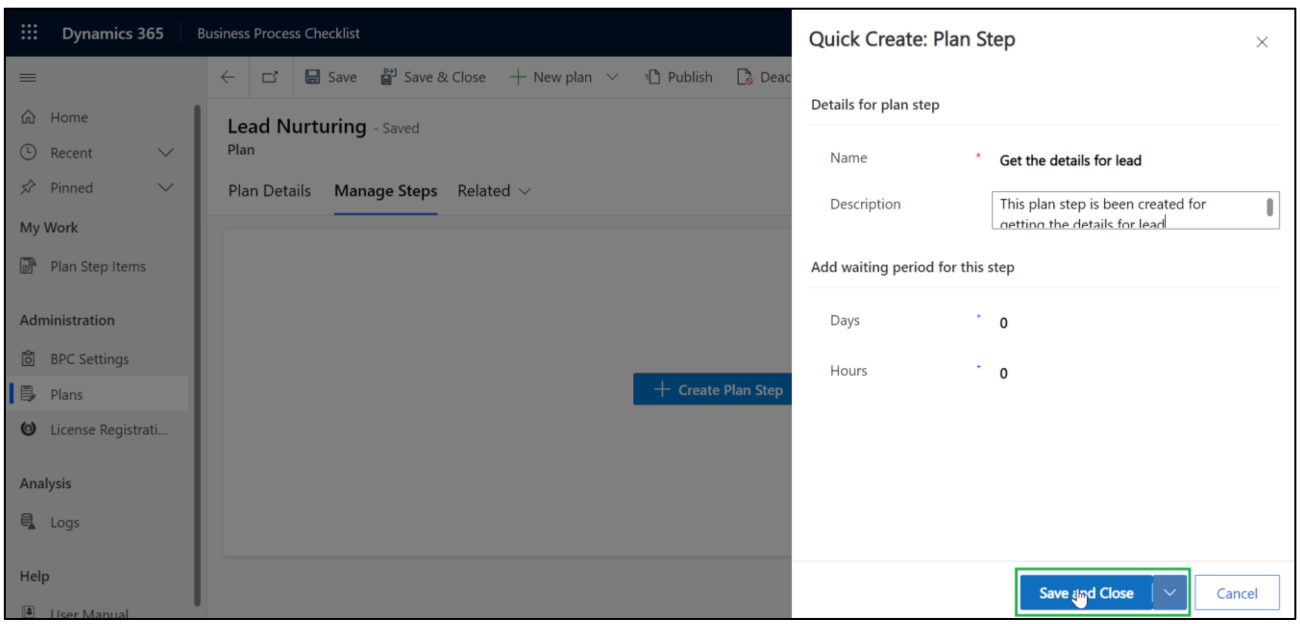
- This will open a **'Quick Create Form: Plan Step',** where we need to fill in the details**.**
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
  - **Add a waiting period for this step (Optional):** A waiting 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.**

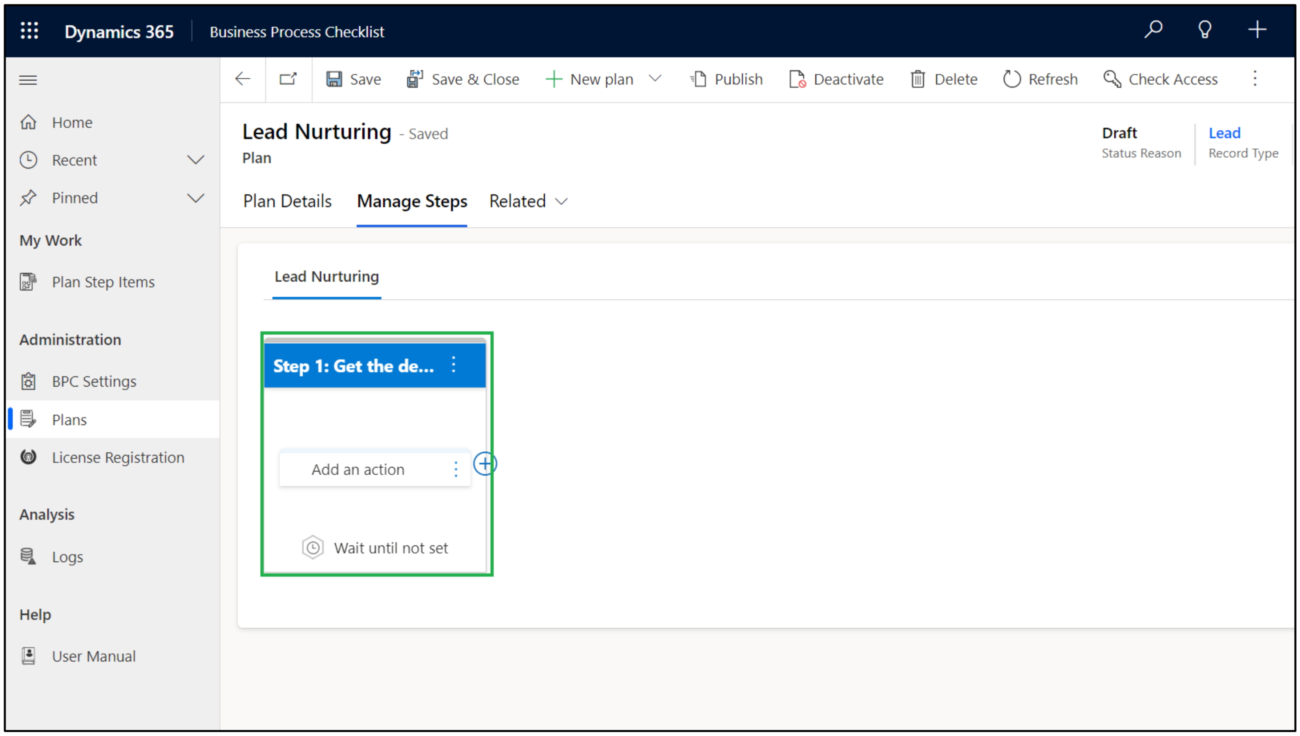
- **Hours:** Add the desired waiting period for this step to be performed after **'X' Hours.**



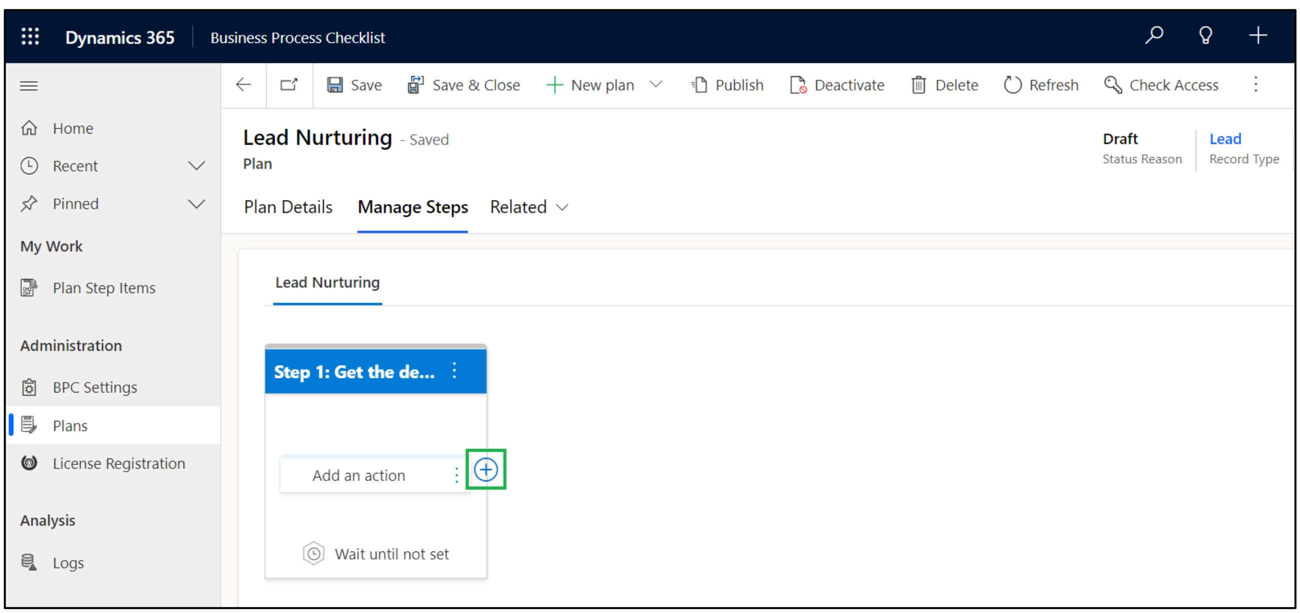
- Once the required fields are filled, click on **'Save and Close'**.



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



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



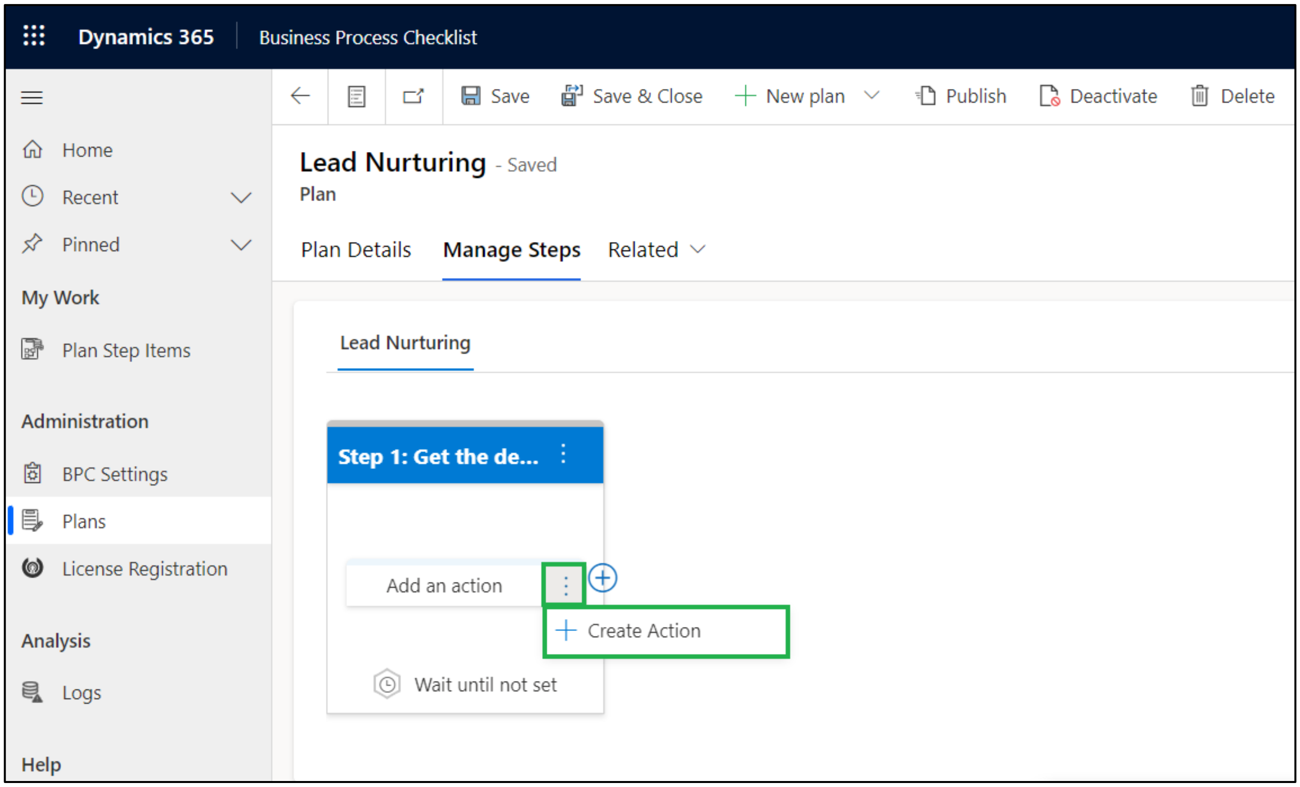
Now that we have created a plan step, let’s add plan step actions next.

Plan Step Action

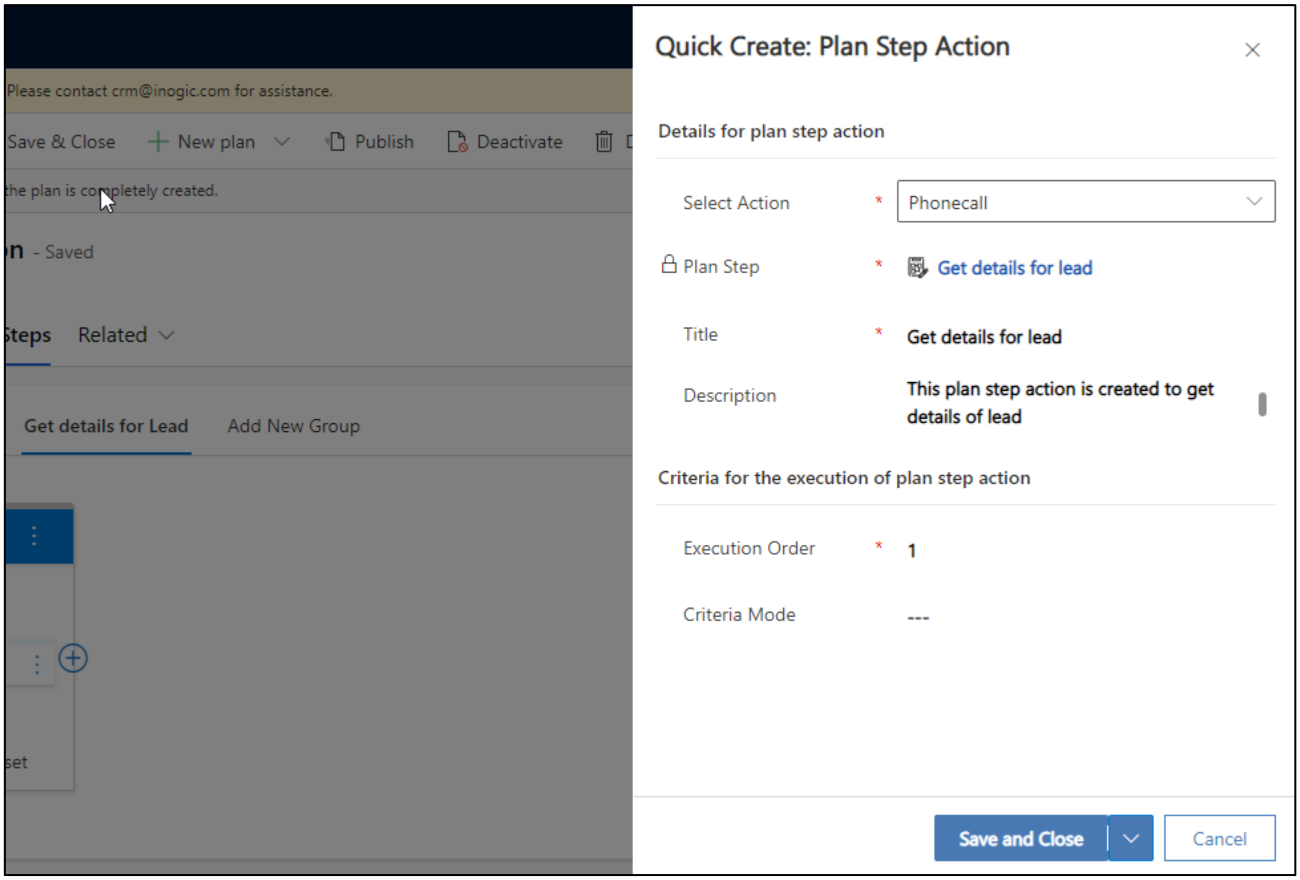
Plan step actions are activities that can be added to a task/plan step to define what activities a salesperson needs to undertake in a specific way to successfully perform a task. For example, in plan step actions, we can define actionable steps like sending a follow-up email or verifying lead details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

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

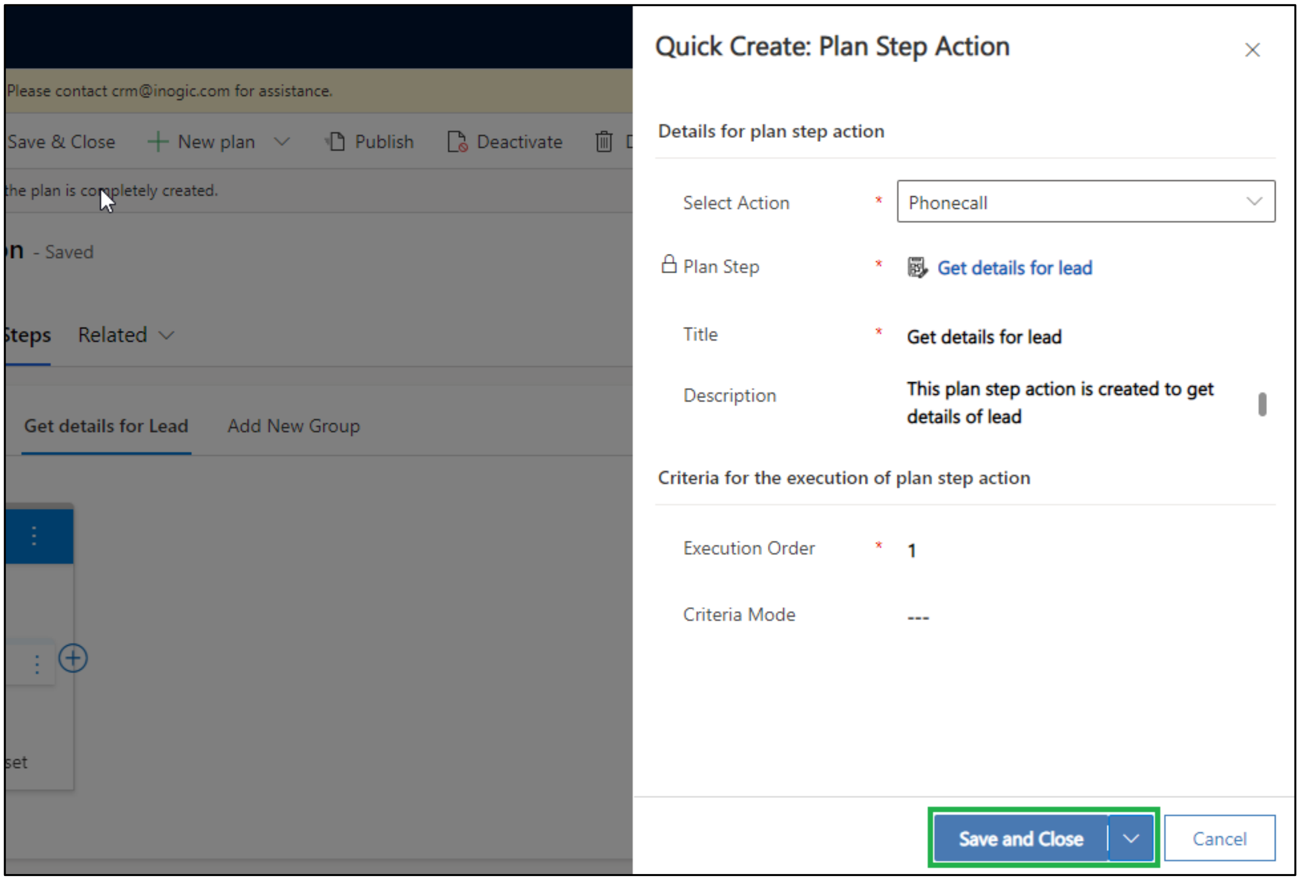
- Click on **ellipsis --> '+ Create Action'** to Add an action.



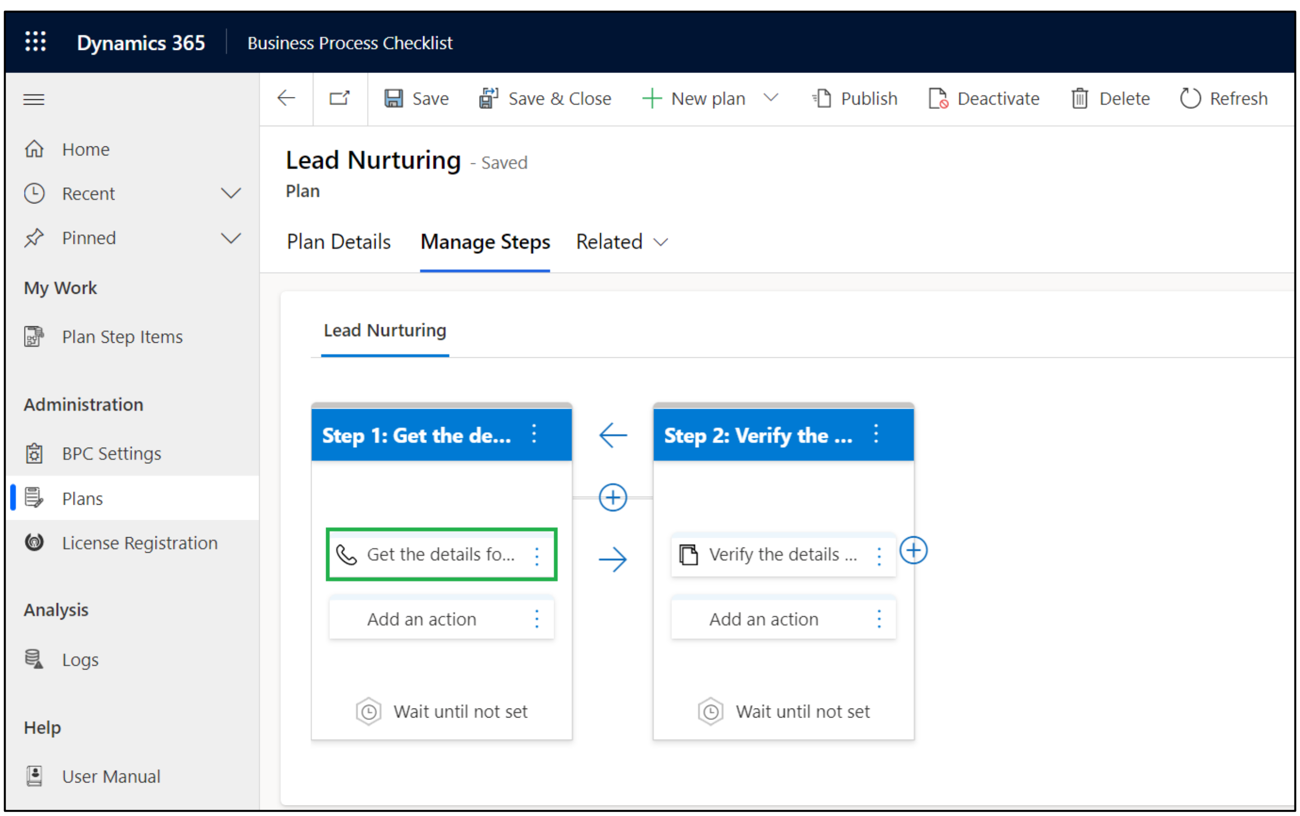
- This will open a **'Quick Create Form: Plan Step Action',** where we need to fill in the details**.**
  - **Select Action:** Select an activity (Phone Call, Email, and Tasks) through which you want to carry out a task.
  - **Title:** Your plan step action title is the same as your plan step name, but 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.



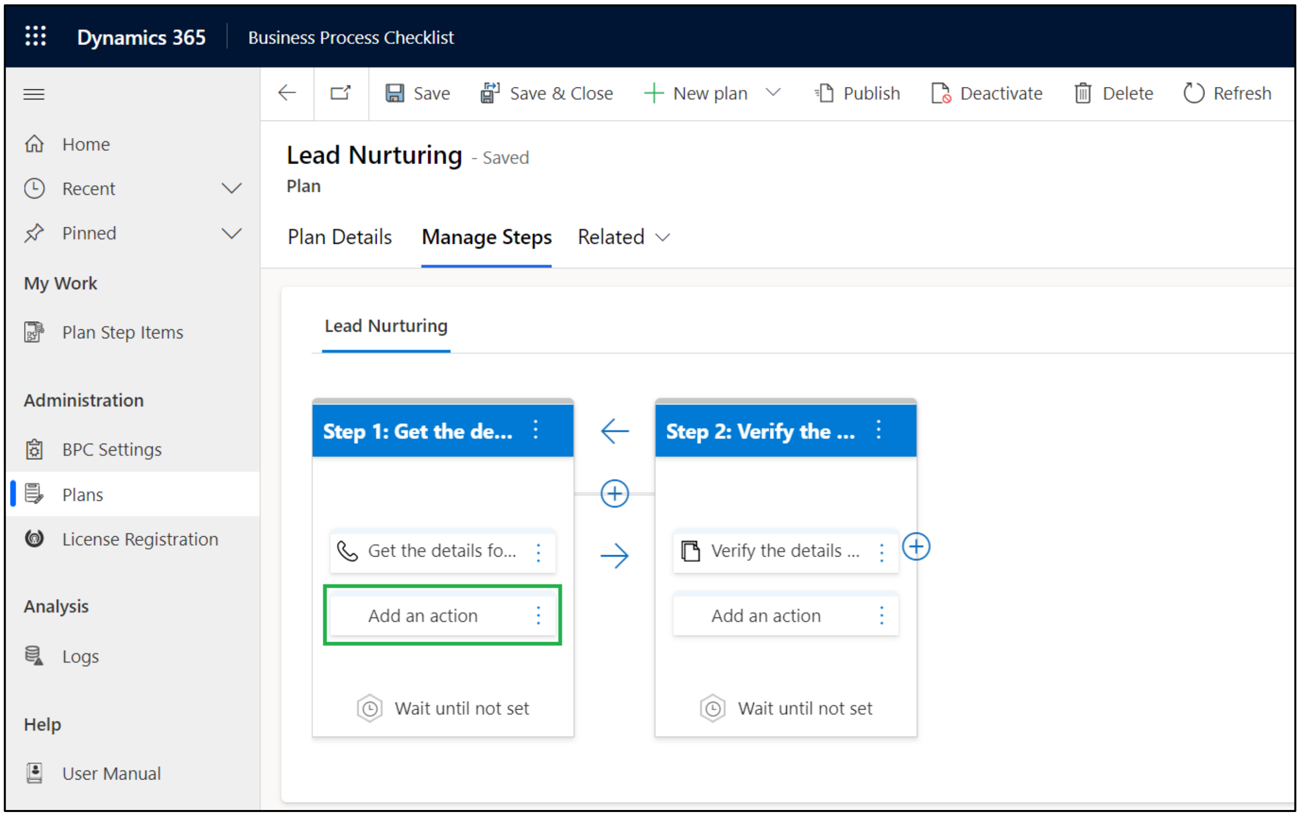
- Once the required fields are filled, click on **'Save and Close'**.



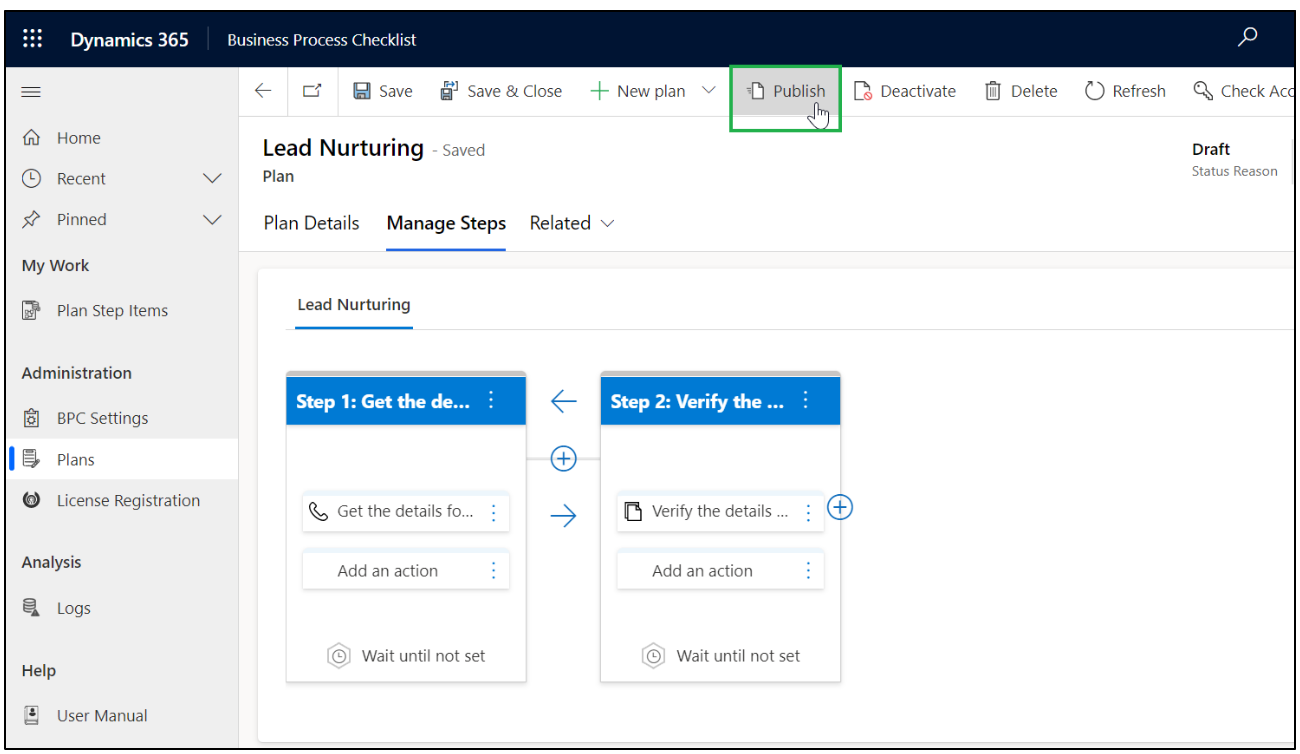
- Your Plan Step Action will be added to the plan step and will appear on **Plan Step Actions.**



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



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



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.

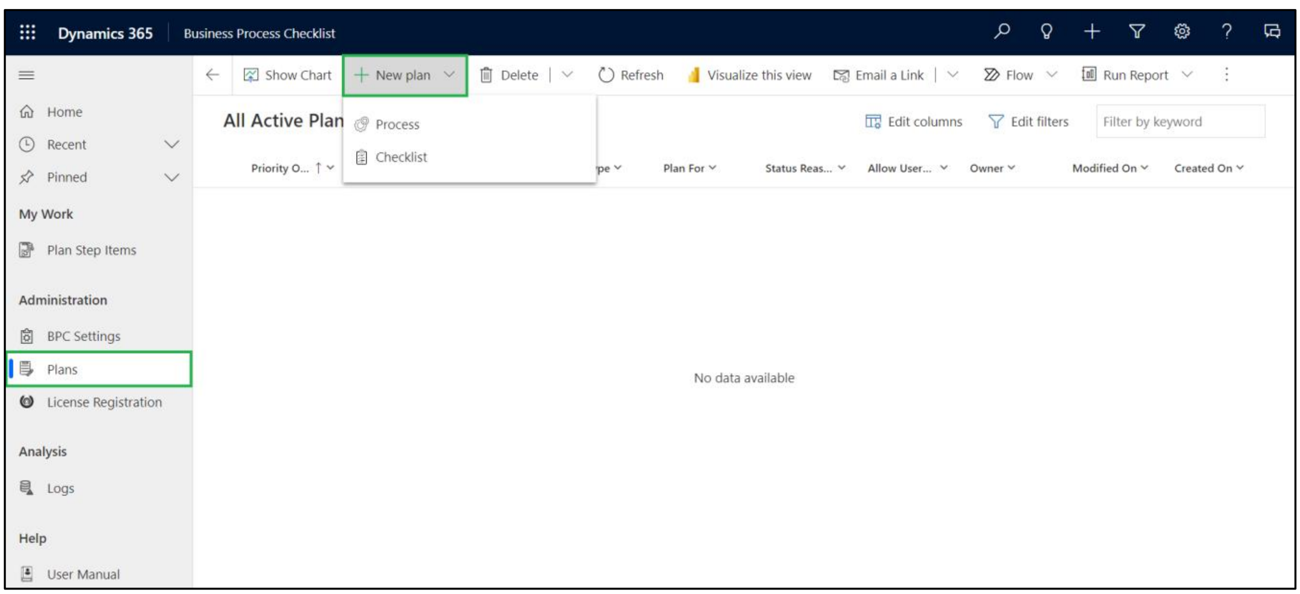
This proves useful for creating flexible plans where your salesperson can perform tasks based on their requirements of the business process, irrespective of the order of tasks set in the plan.

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

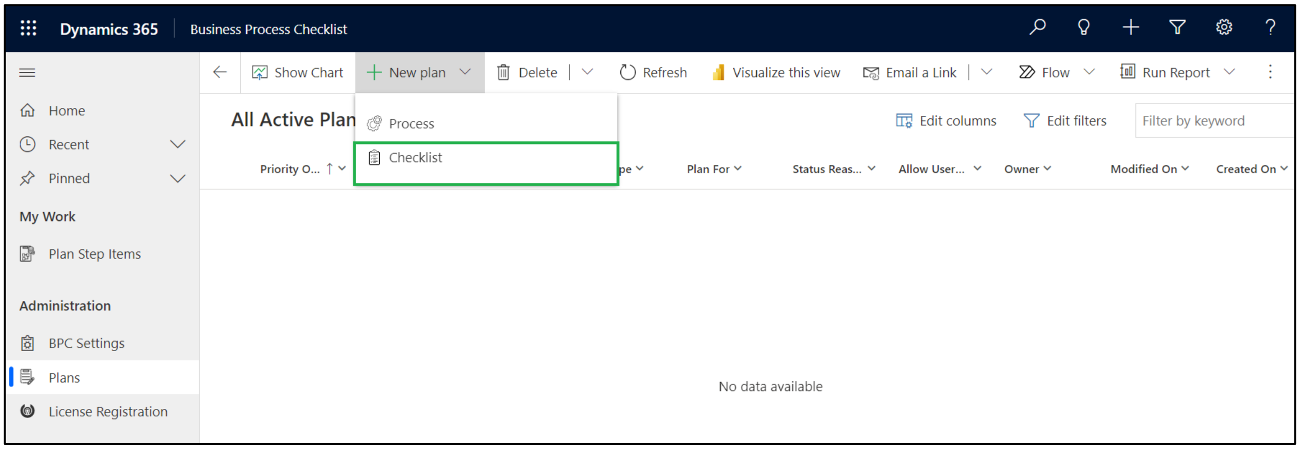
Plan

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.

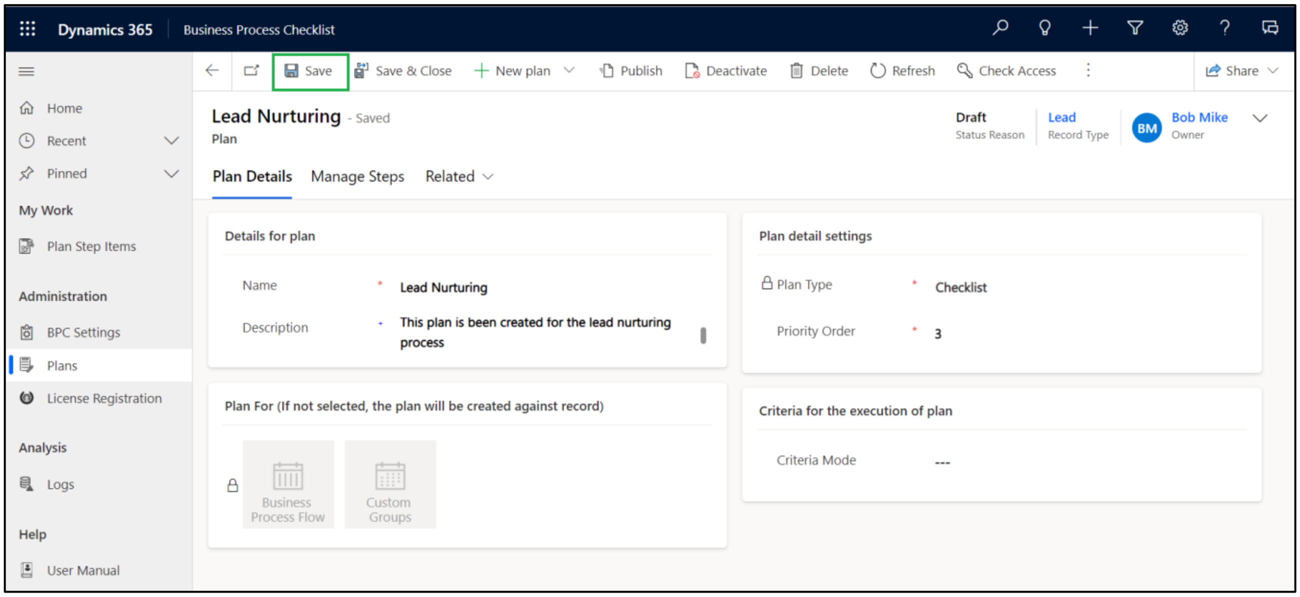
- Navigate to **Business Process Checklist App --> Plans --> New Plan.**



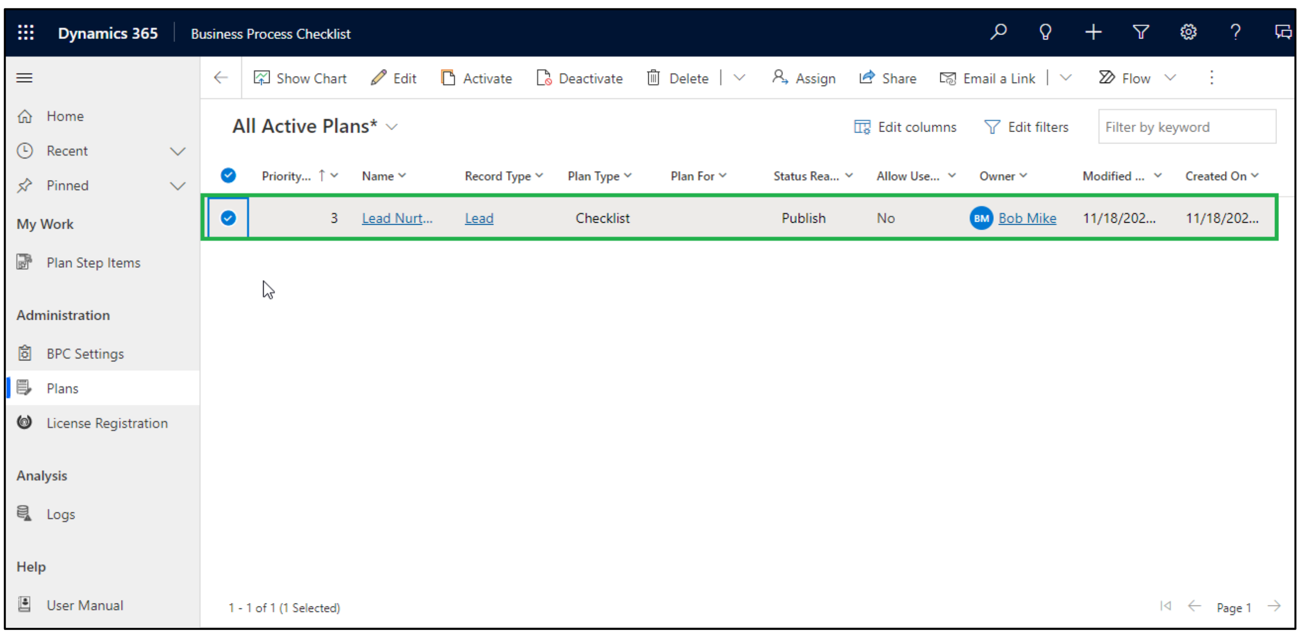
- Click on the **'New plan'** button and select **Checklist.**



- 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'**.



- 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.

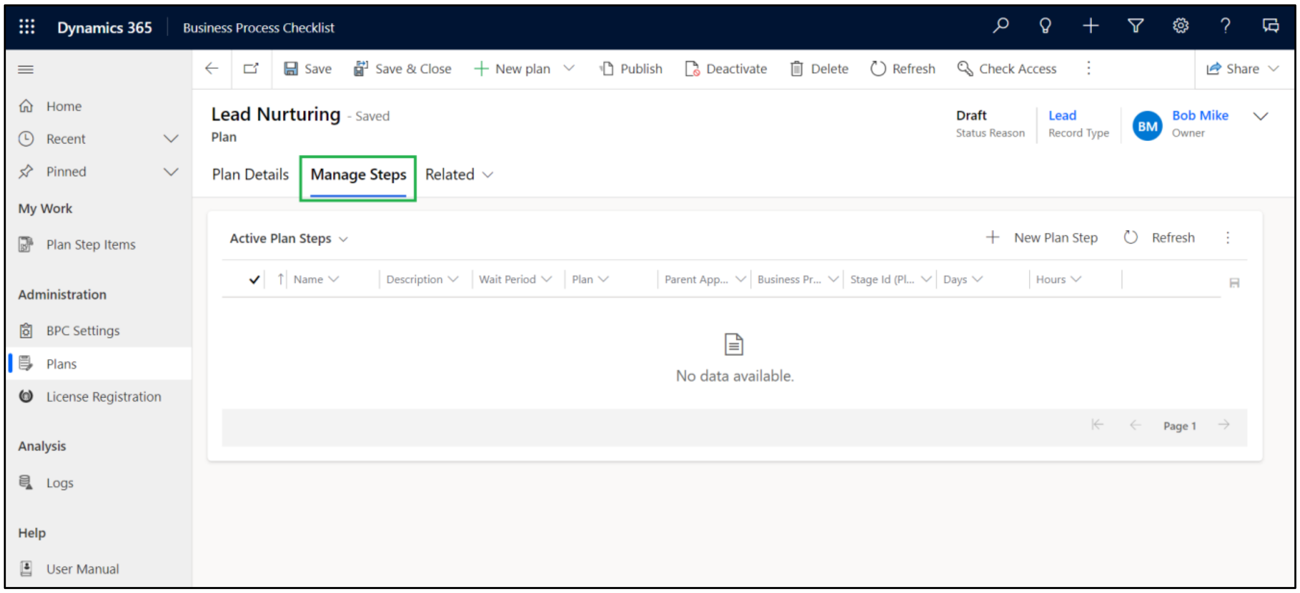
Plan Steps

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.

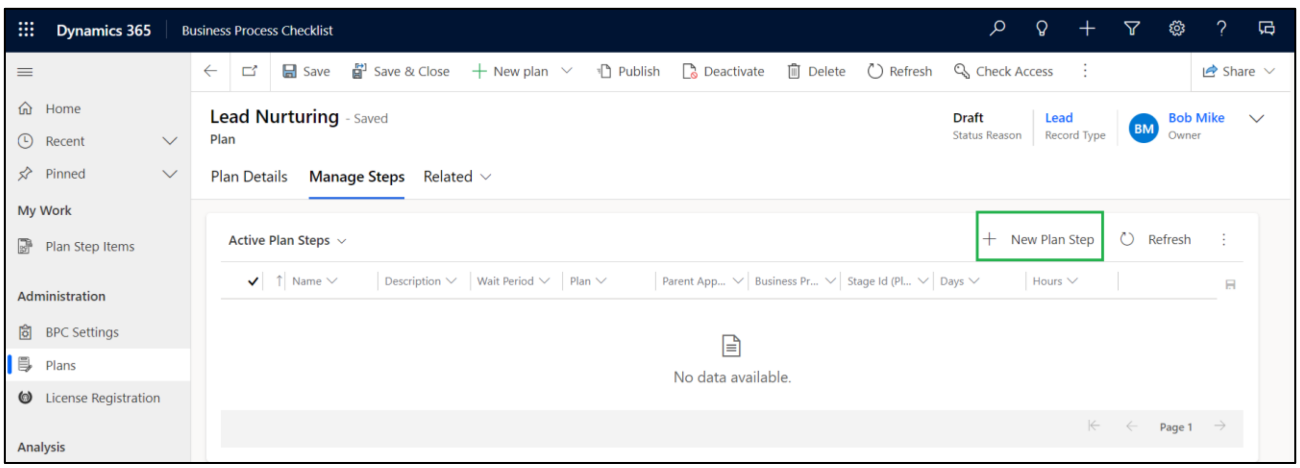
In a Checklist-Type plan, the plan steps help managers define what a task is and why it needs to be performed.

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

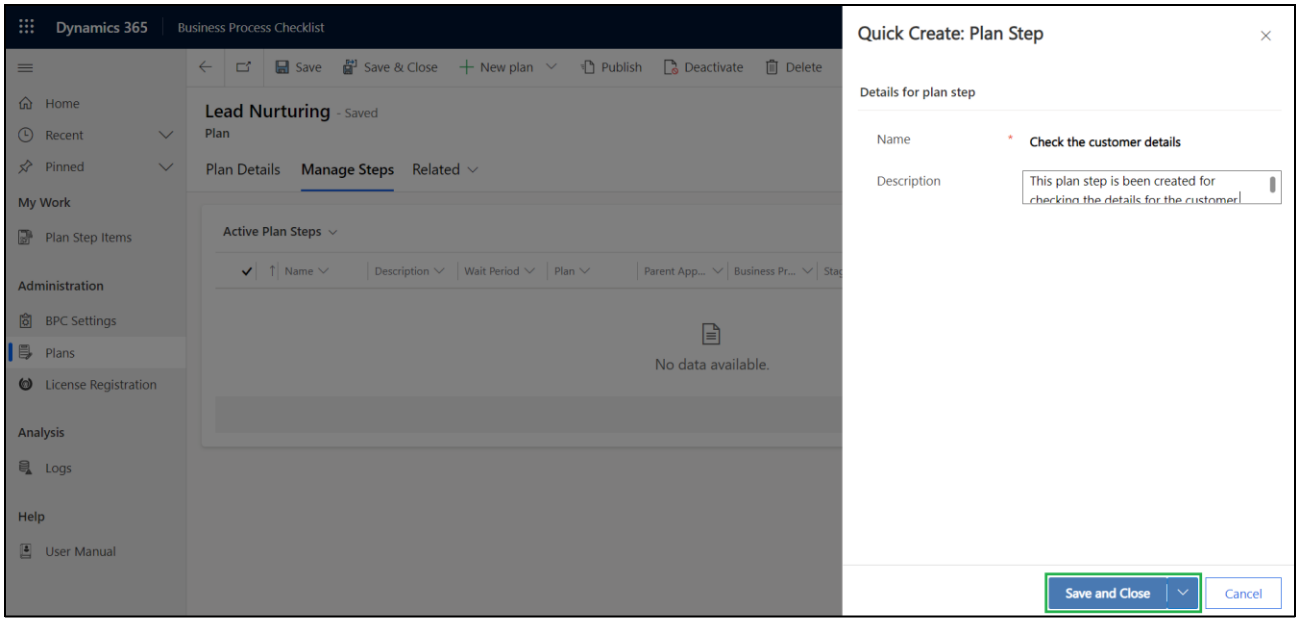
- Once the plan is created, navigate to **Manage Steps**.



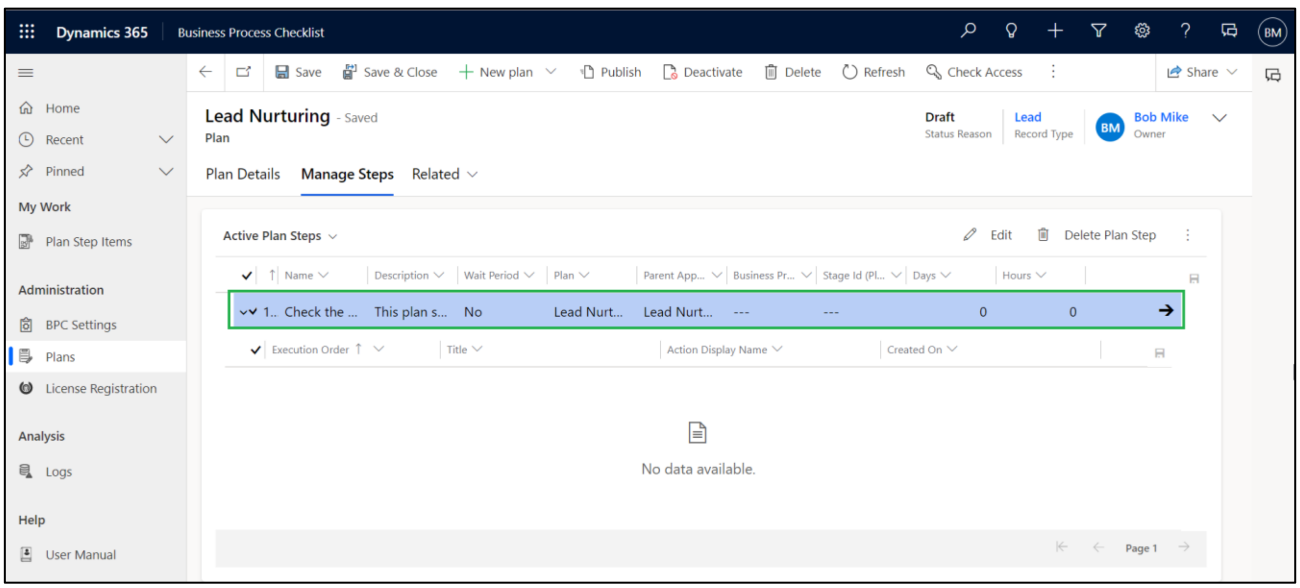
- Click on the **New Plan Step** button.



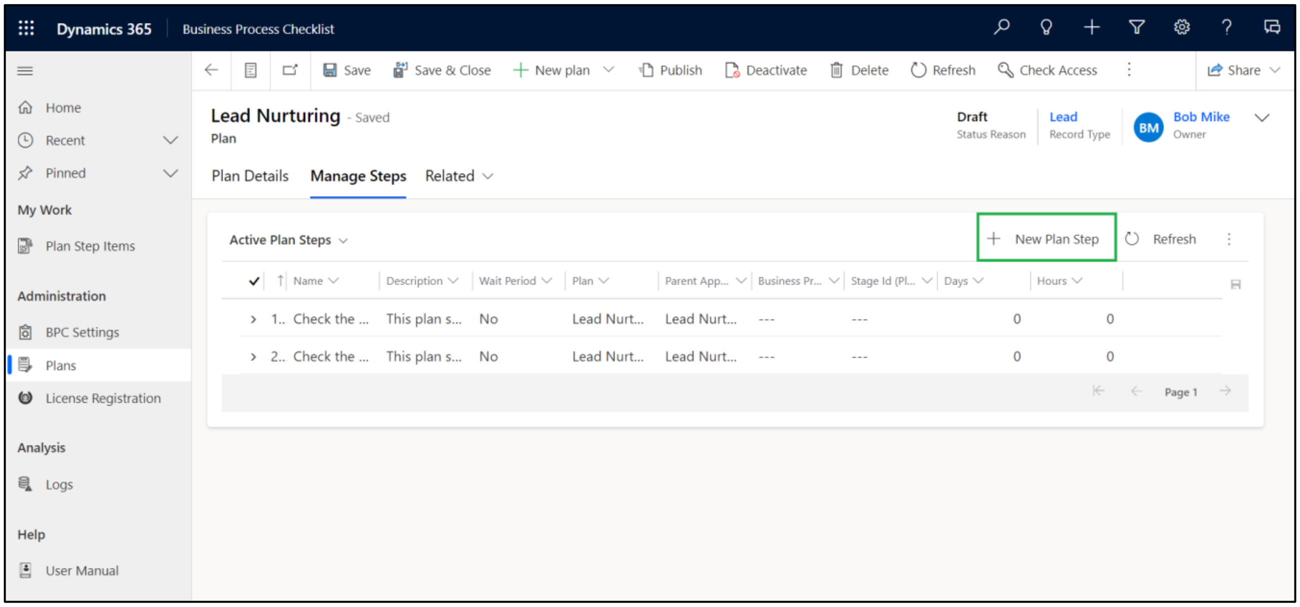
- This will open the **'Quick Create Form: Plan Step',** where we need to fill in the details**.**
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description:** Provide a short description of the Plan Step.
- Once the required fields are filled, click on **'Save and Close'.**



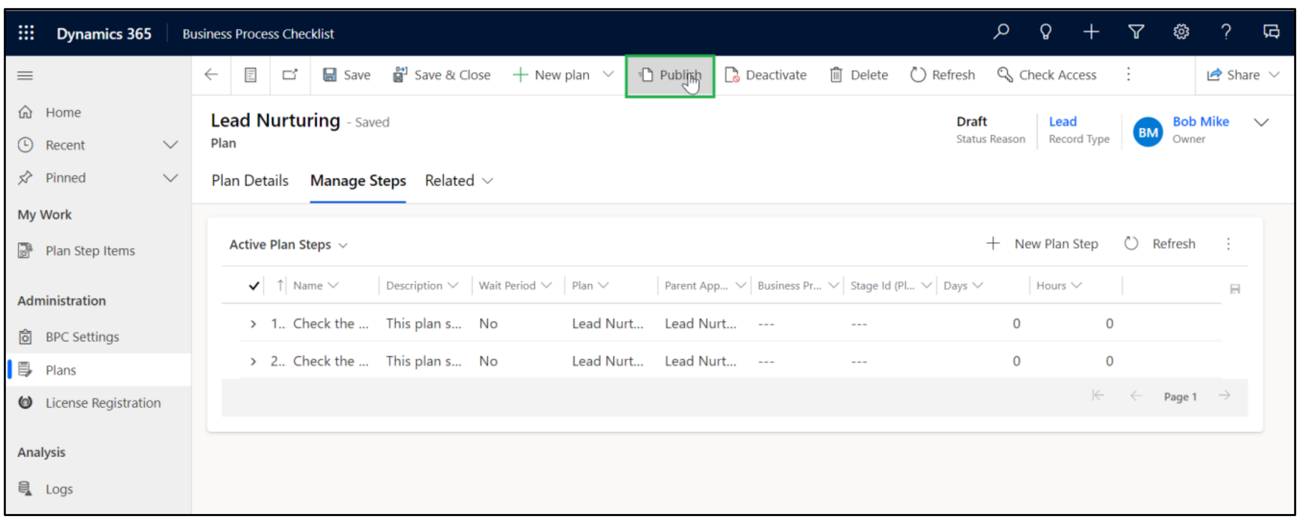
- Your plan step will be added to the checklist and appear on Plan Steps.



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



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



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.

Create Plan for Business Process Flow

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.

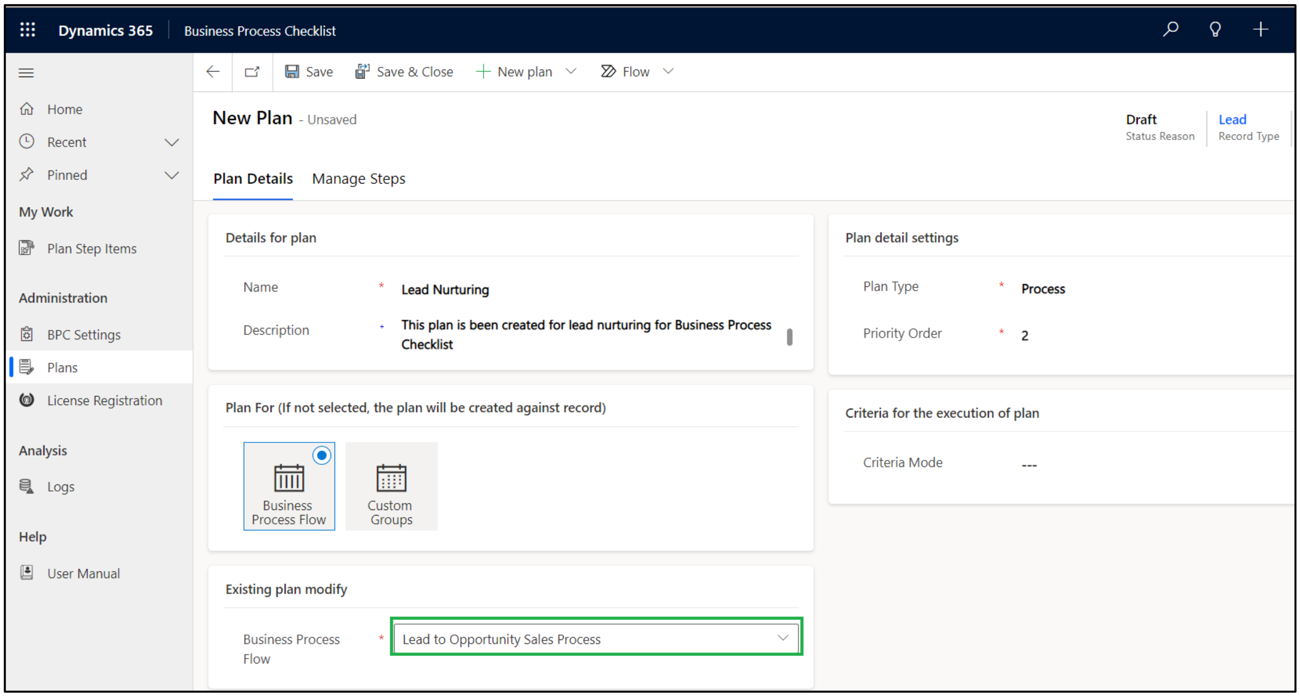
Process-Type plan for Business Process Flow:

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.

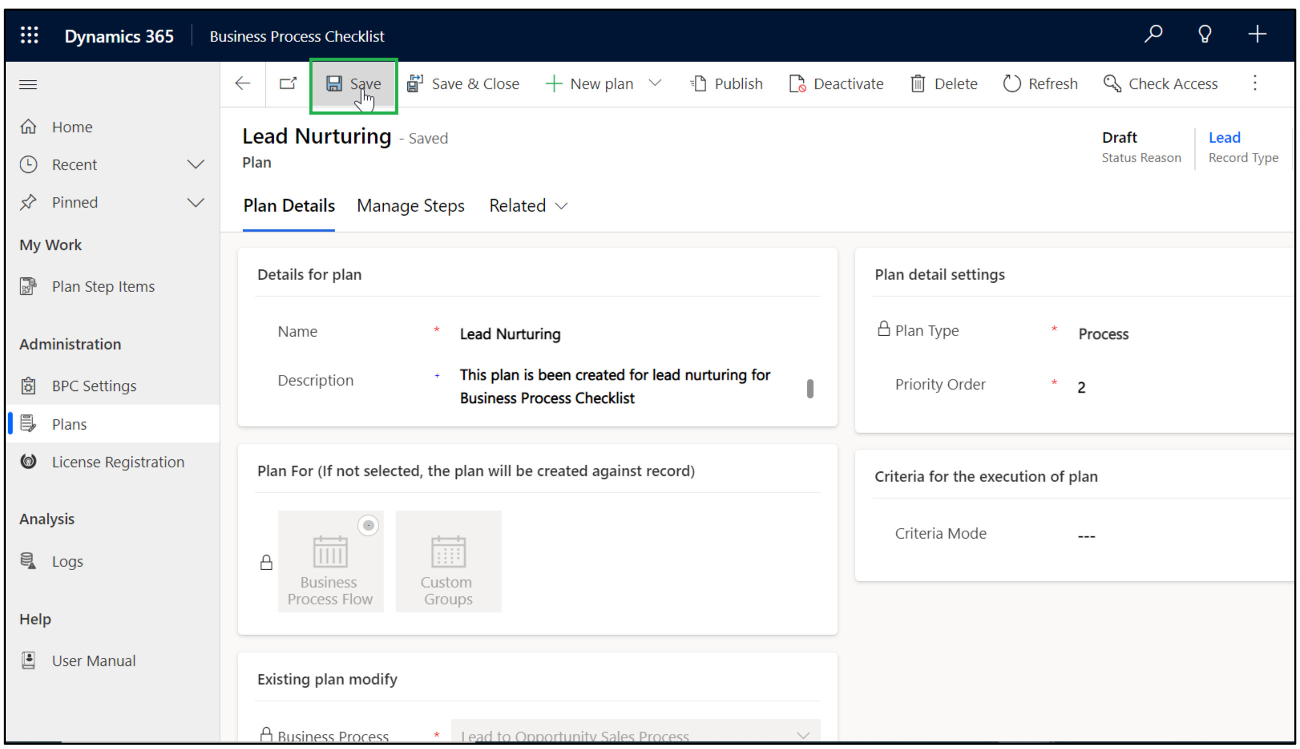
This is useful for creating plans for Business Process Flow where you want your salesperson to follow the guidelines in a predefined order and not randomly.

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.



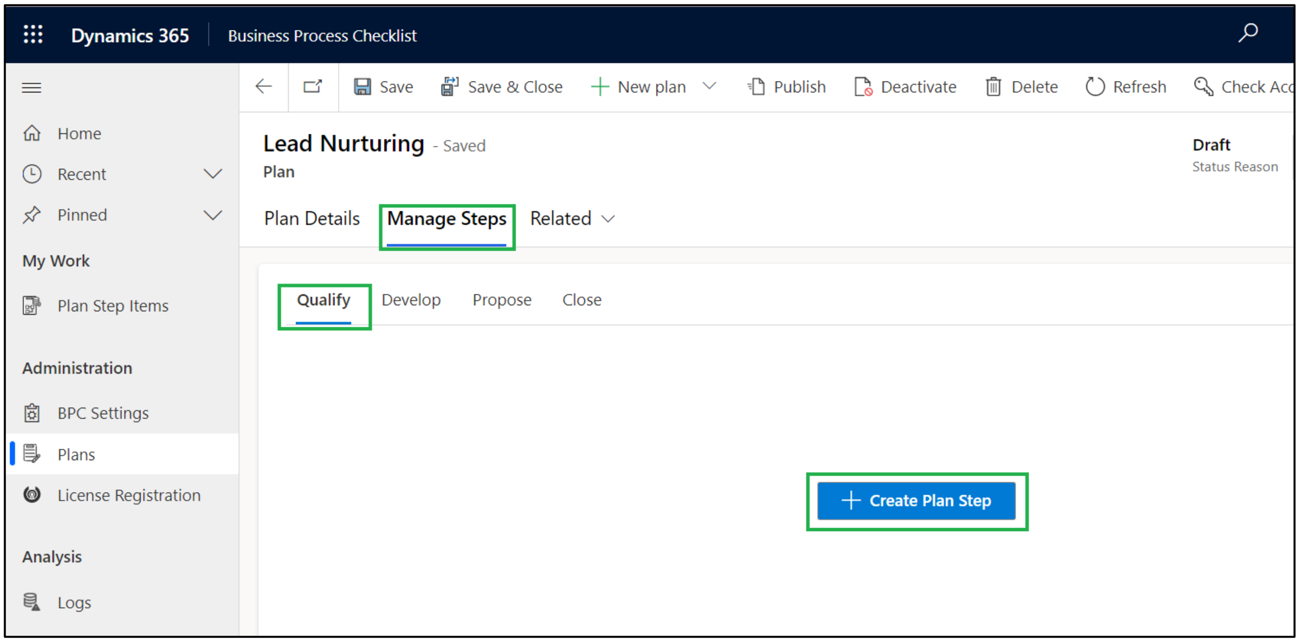
- Once the required fields are filled, click on **'Save'**.



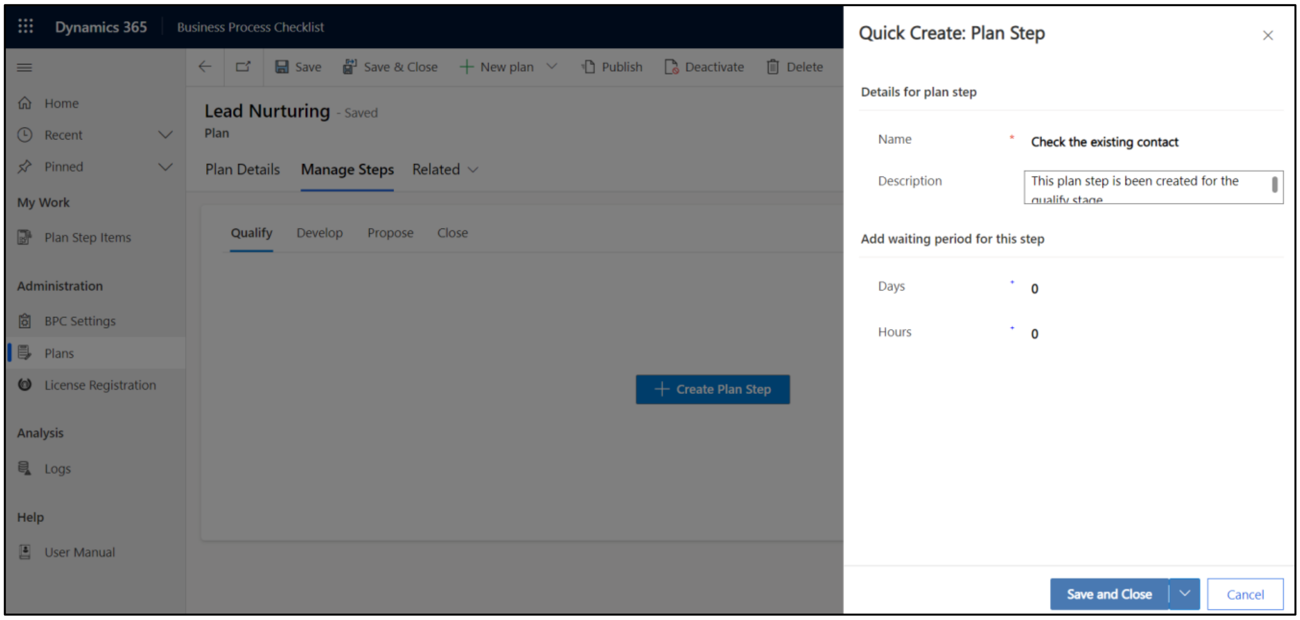
Your Process-Type plan for Business Process Flow is created and now you can add the Plan Steps inside the various stages of the selected Business Process Flow. To do the same, follow the steps given below:

- 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.

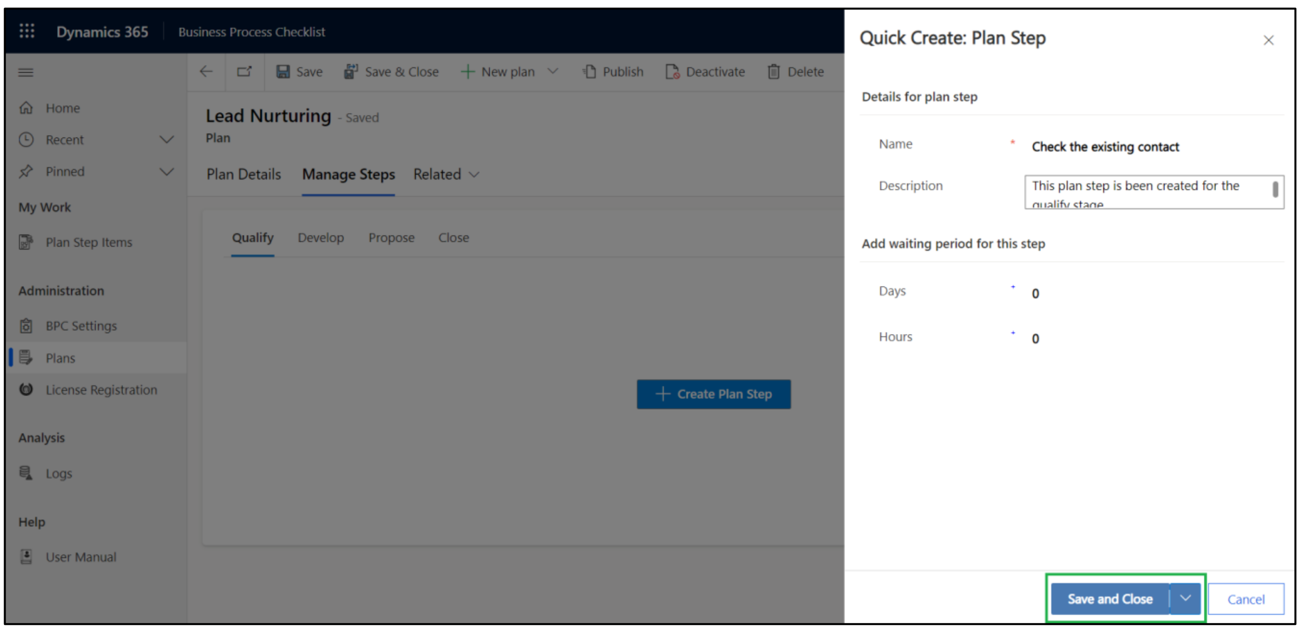
- **For example:** Here we have selected the Business process flow of the **Lead to Opportunity Sales Process,** and the stages are Qualify, Develop, Propose, and Close of the **Lead to Opportunity Sales Process** which will automatically be displayed as shown below.
- Now, select the required BPF stage,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



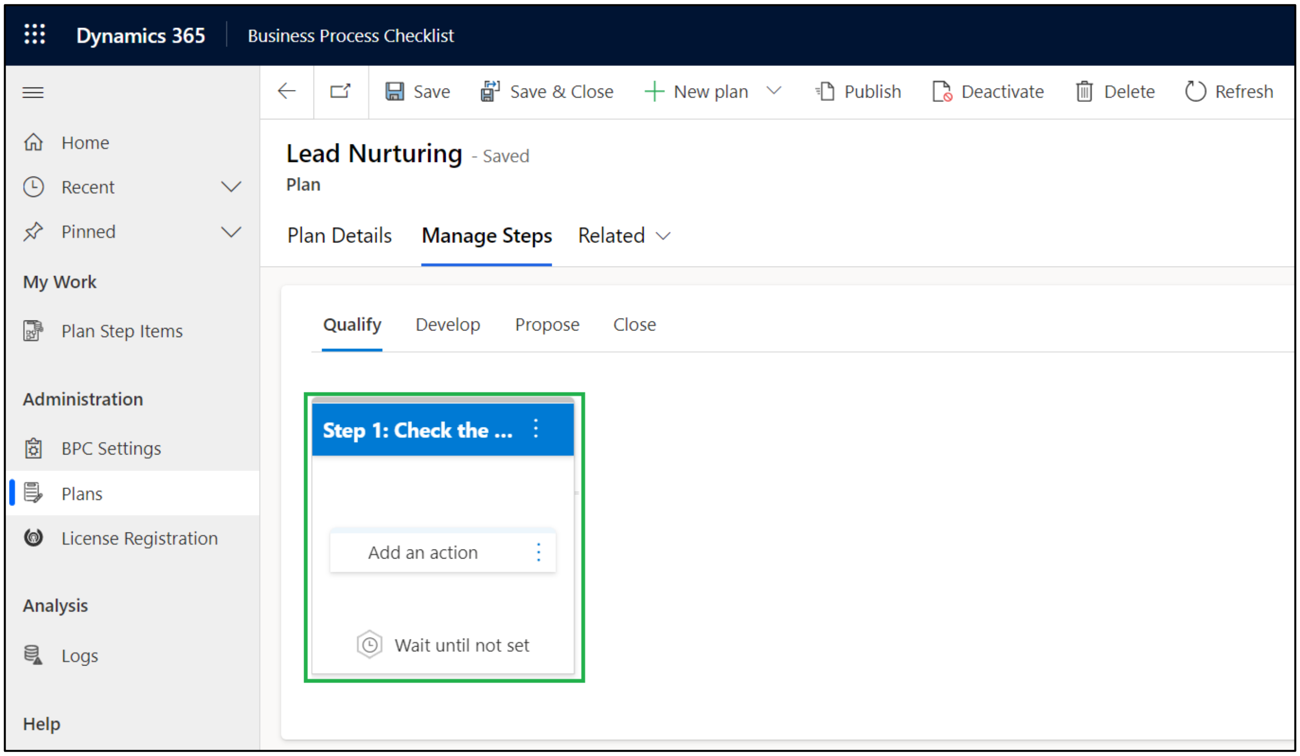
- This will open the **'Quick Create Form: Plan Step',** where we need to fill in the details**.**
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
  - **Add a waiting period for this step (Optional):** A waiting 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.**



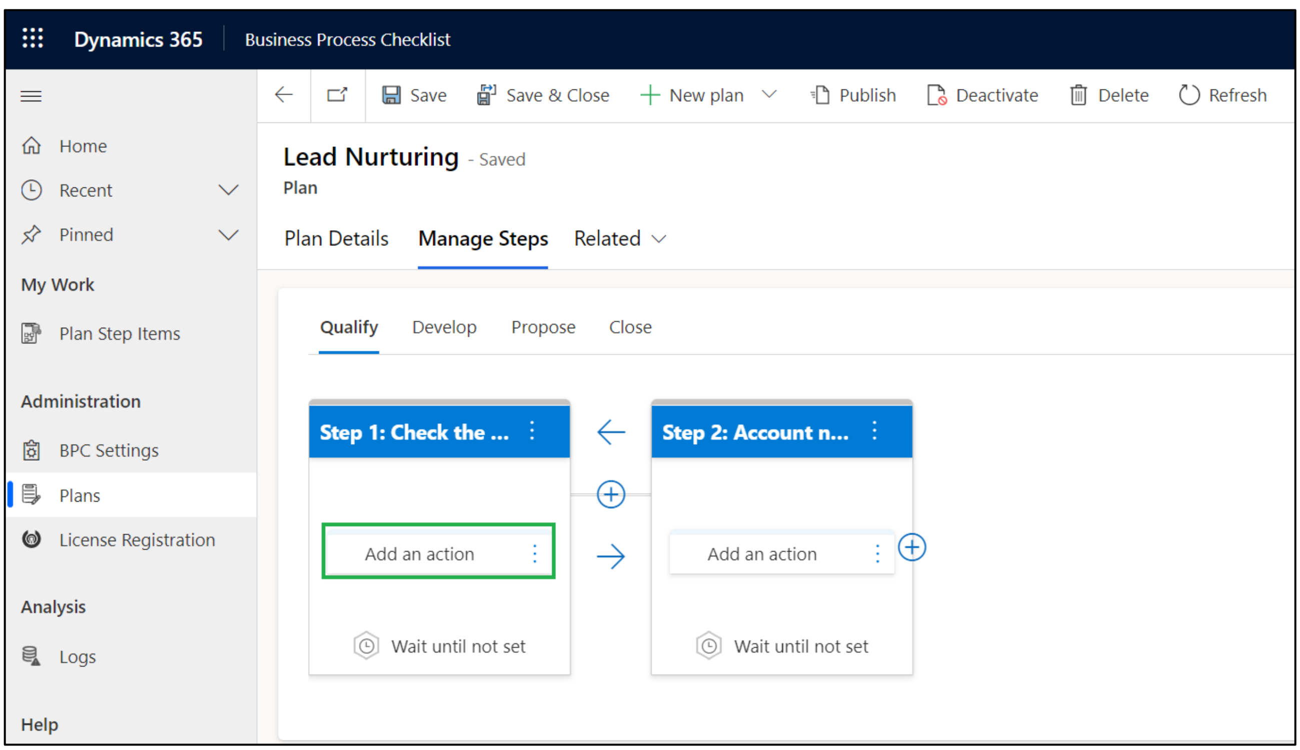
- Once the required fields are filled, click on **'Save and Close'**.



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



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



- 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.

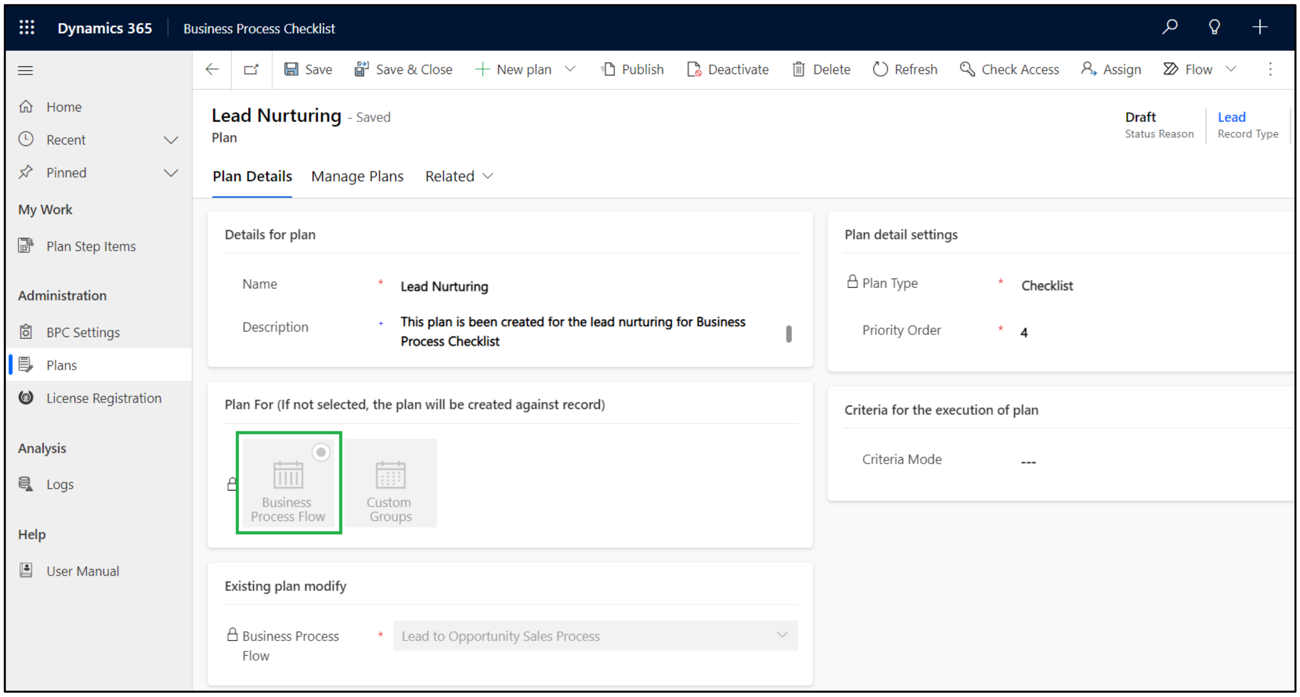
Checklist-Type Plan for Business Process Flow:

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.

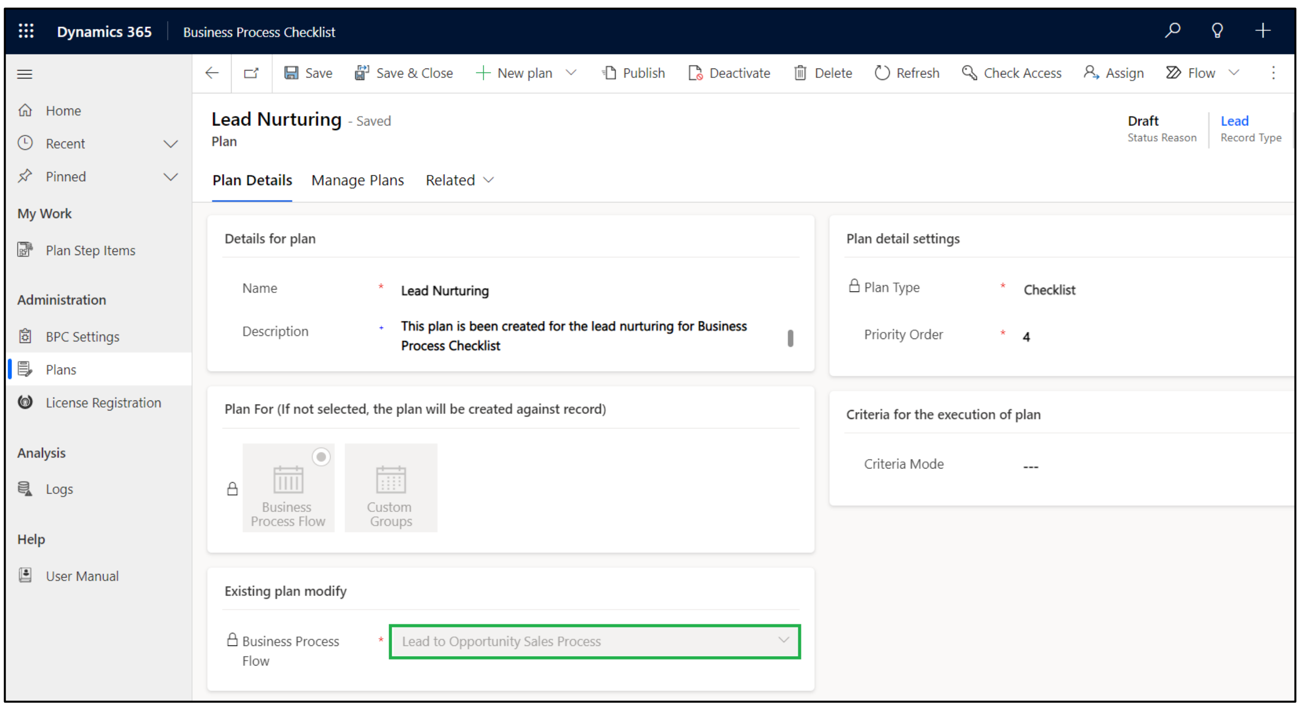
This proves useful for creating flexible plans for Business Process Flow where your salesperson can perform tasks based on their requirements of the business process, irrespective of the order of tasks set in the plan.

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

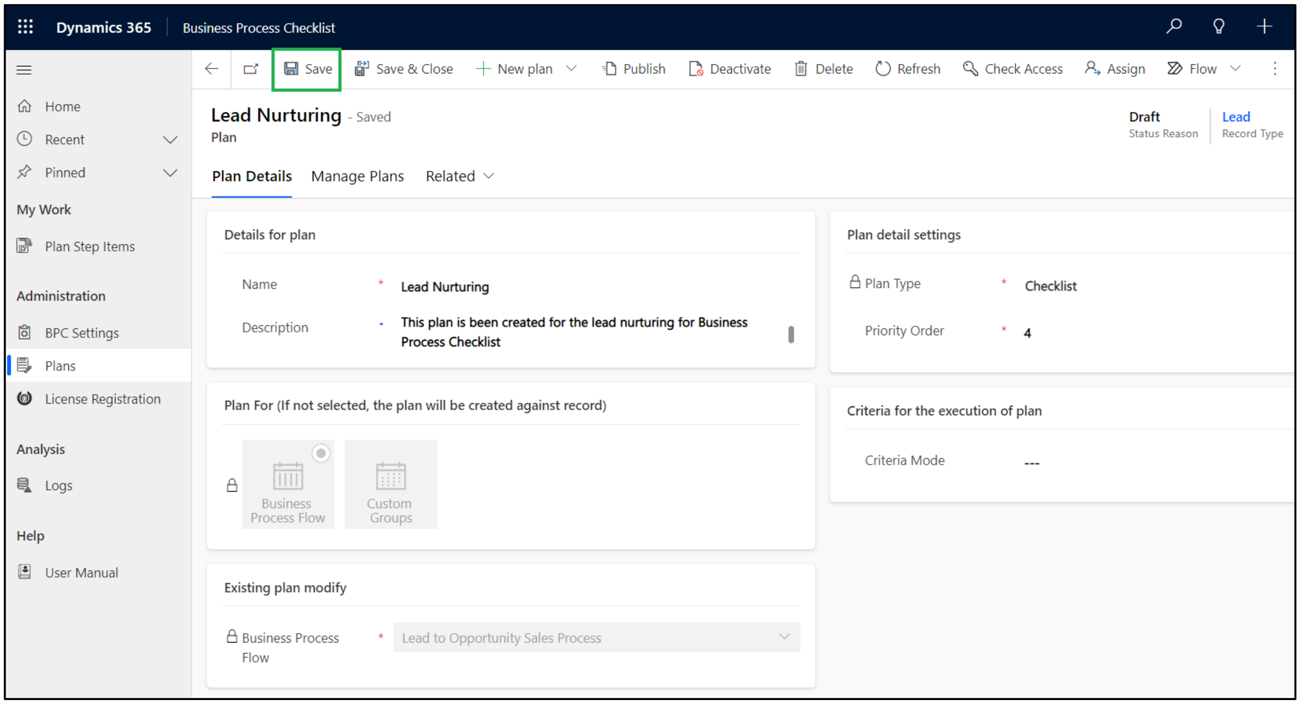
- **Fill in the following plan details:**
  - **Name:** Provide a unique name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Plan Type:** Select Plan Type as **Checklist**.
  - **Record Type:** Select the **Record Type** for which the plan will be created. (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'.**



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

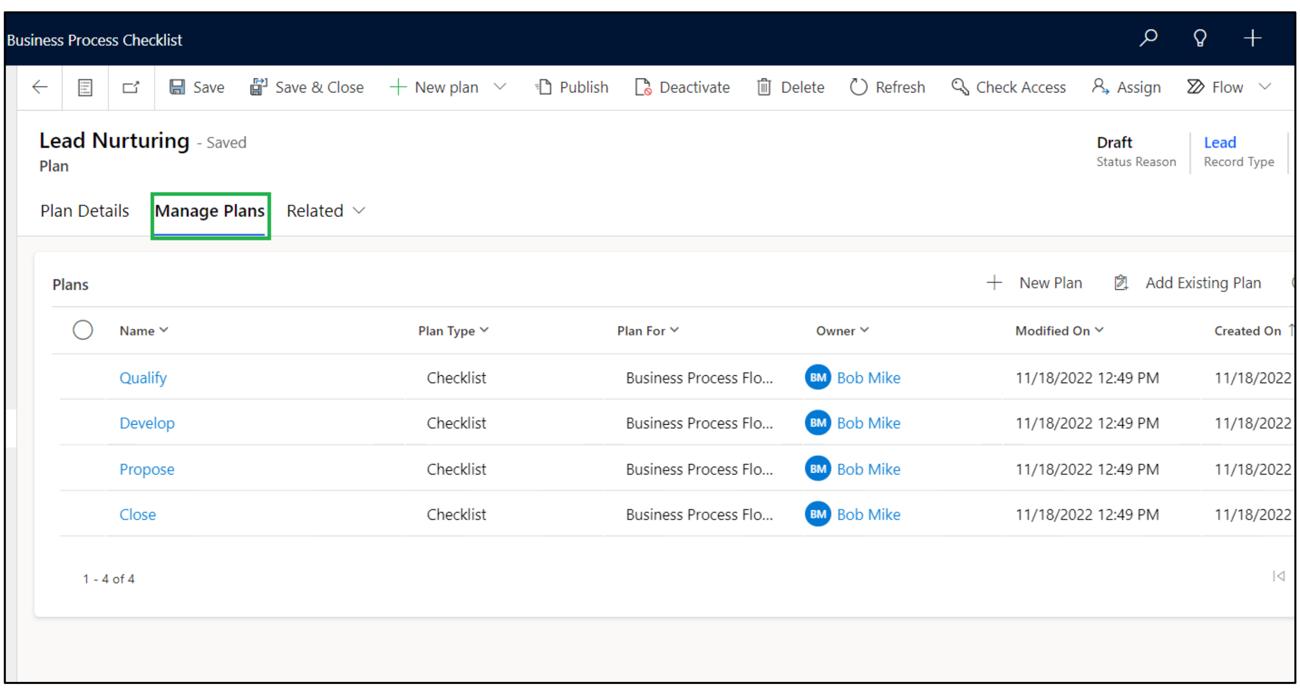


- Once the required fields are filled, click on **'Save'**.

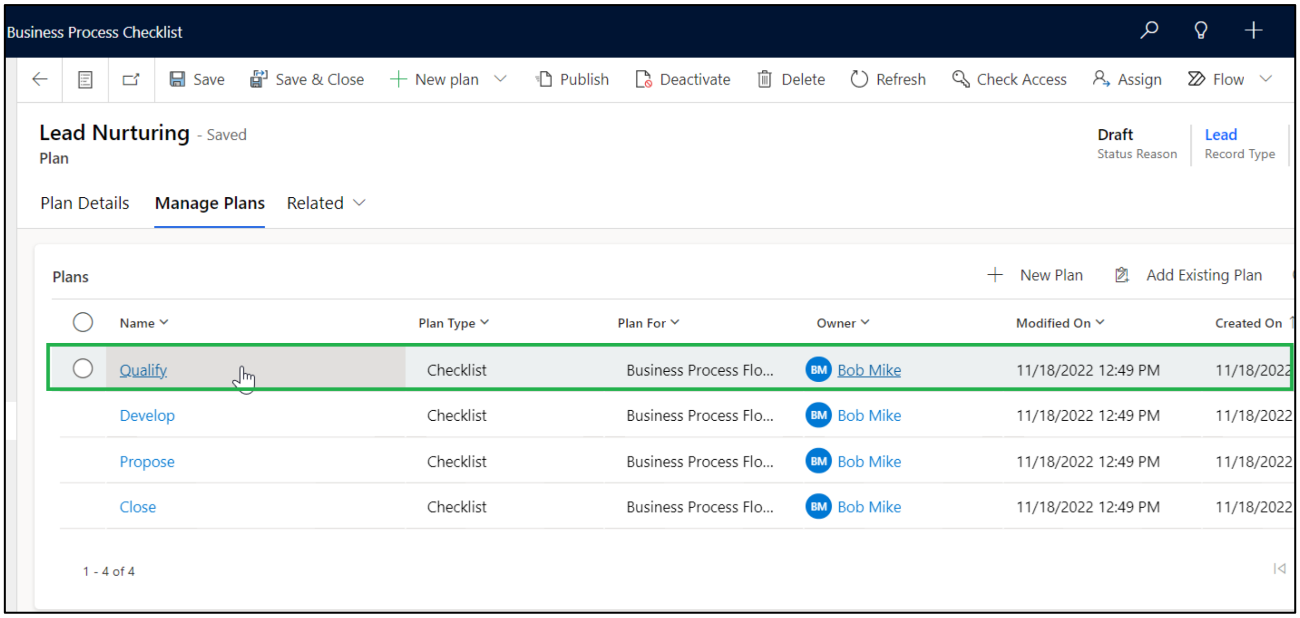


Your Checklist-Type plan for Business Process Flow is created and, now you can add the Plan Steps inside the various stages of the selected Business Process Flow. To do the same, follow the steps given below:

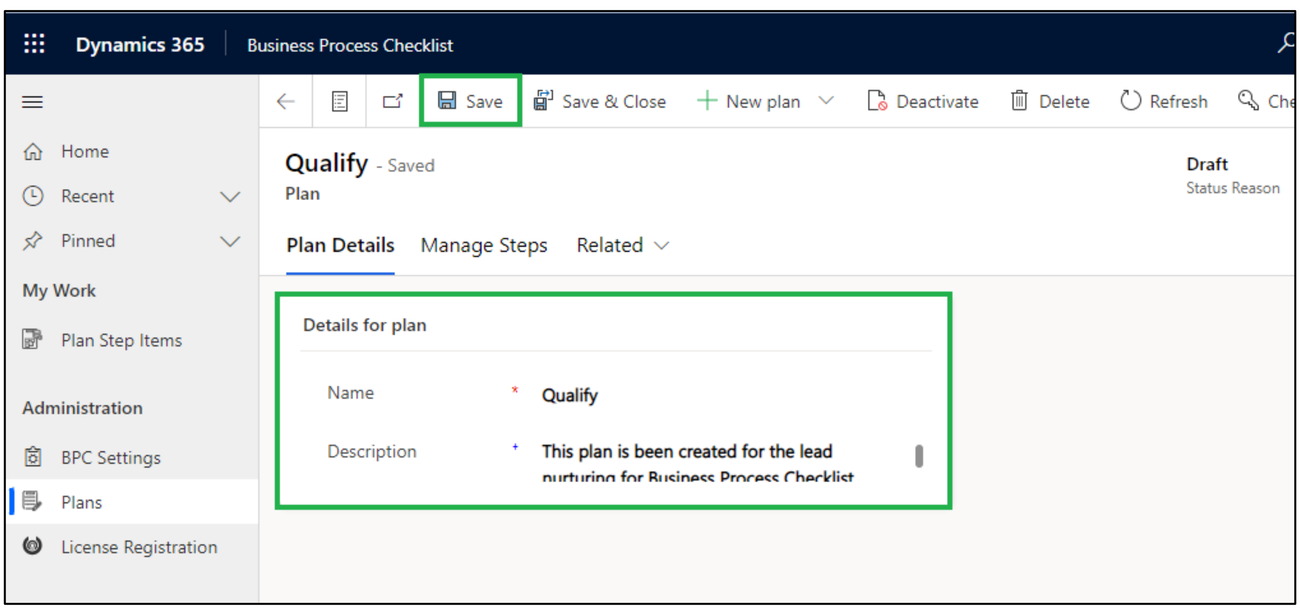
- Navigate to **Manage Steps**.
- Here, as per the Business Process Flow selected by the manager, various stages of the selected Business Process Flow will be displayed. Manager can now select the desired stages and create the actions inside the stages.
- **For example:** here we have selected the Business 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:



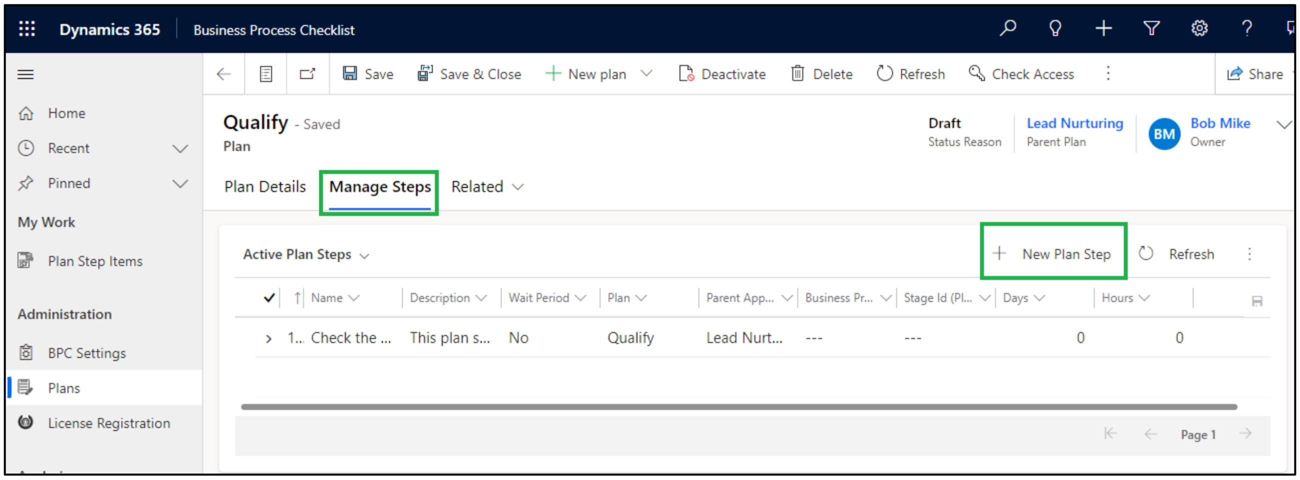
- Now select the required BPF stage. For example, select the **Qualify stage**.



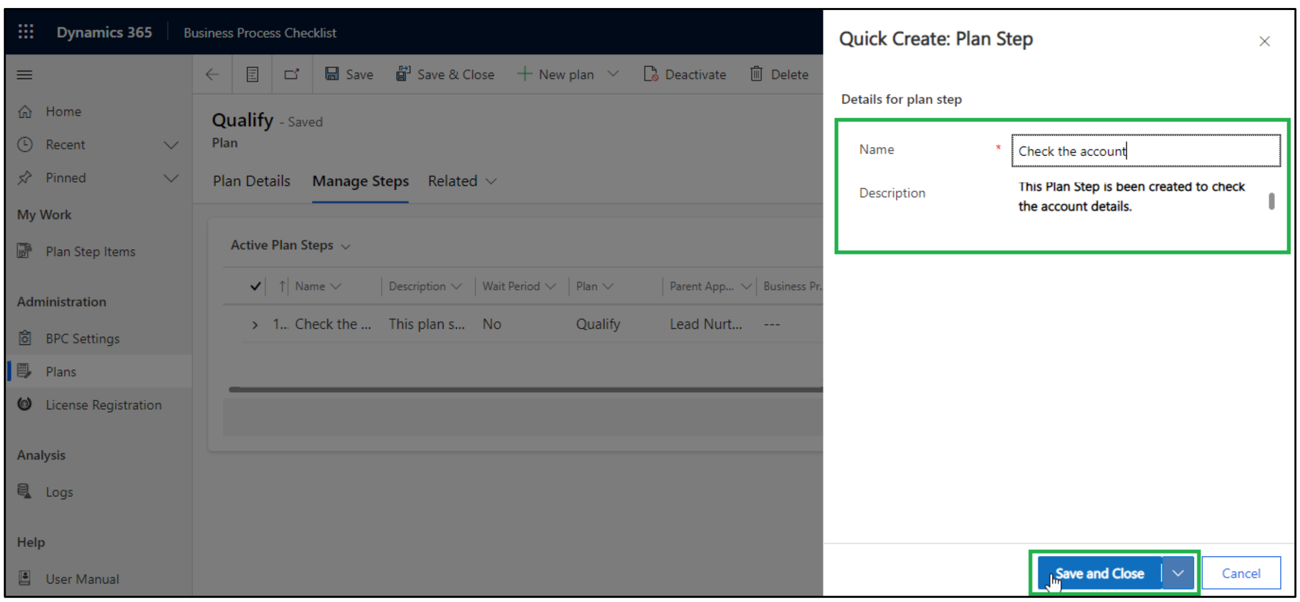
- Fill in the **"Child plan"** details (Qualify**).**
  - **Name:** Provide an appropriate name for the Plan.
  - **Description:** Provide a short description of the Plan.
- Once the required fields are filled, click on **'Save'.**



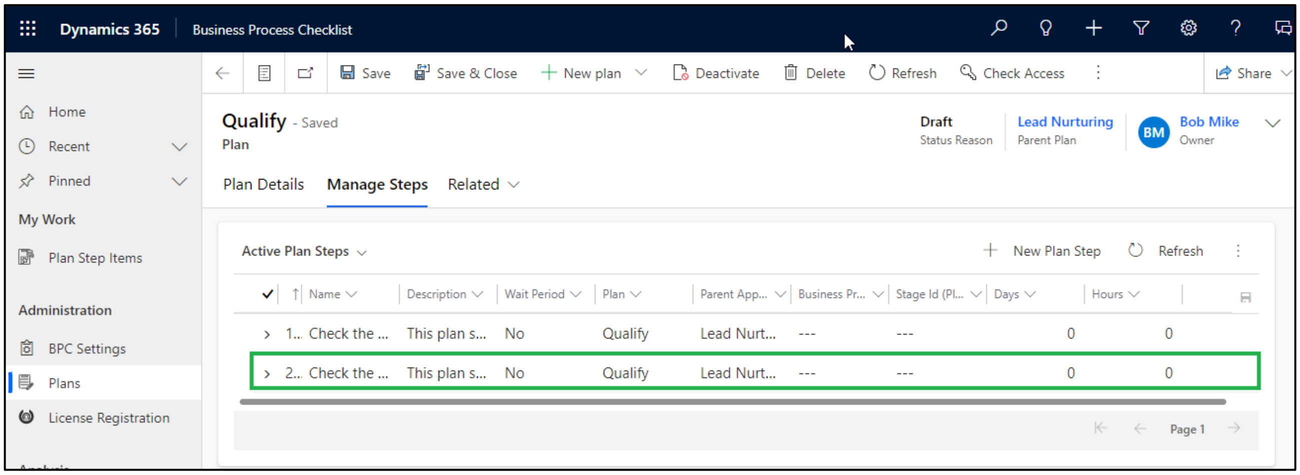
- Navigate to **Manage Steps**.
- Click on the **'New Plan step'** Button.



- 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 (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:

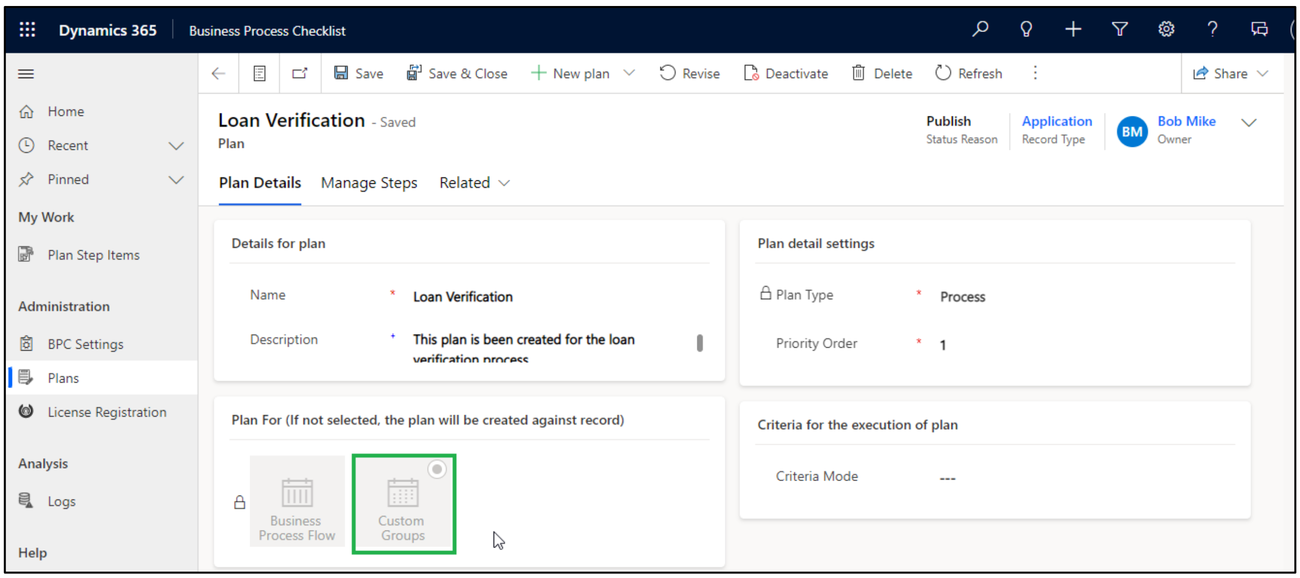
Sometimes, users need to have a plan for Custom Groups where order of tasks in the plan matters to complete a business process effectively, in this case manager can create a Process-Type plan for Business Process Flow.

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.

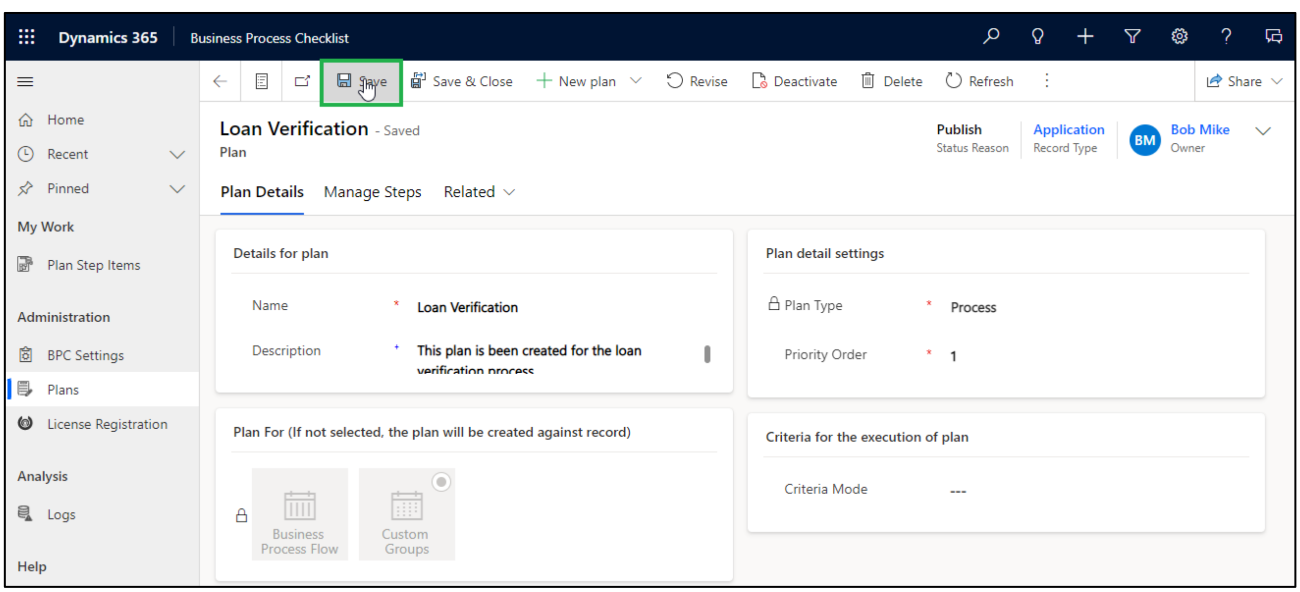
To create a Process-Type plan for Custom Groups, follow the steps given below:

- **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.)

- **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'.**

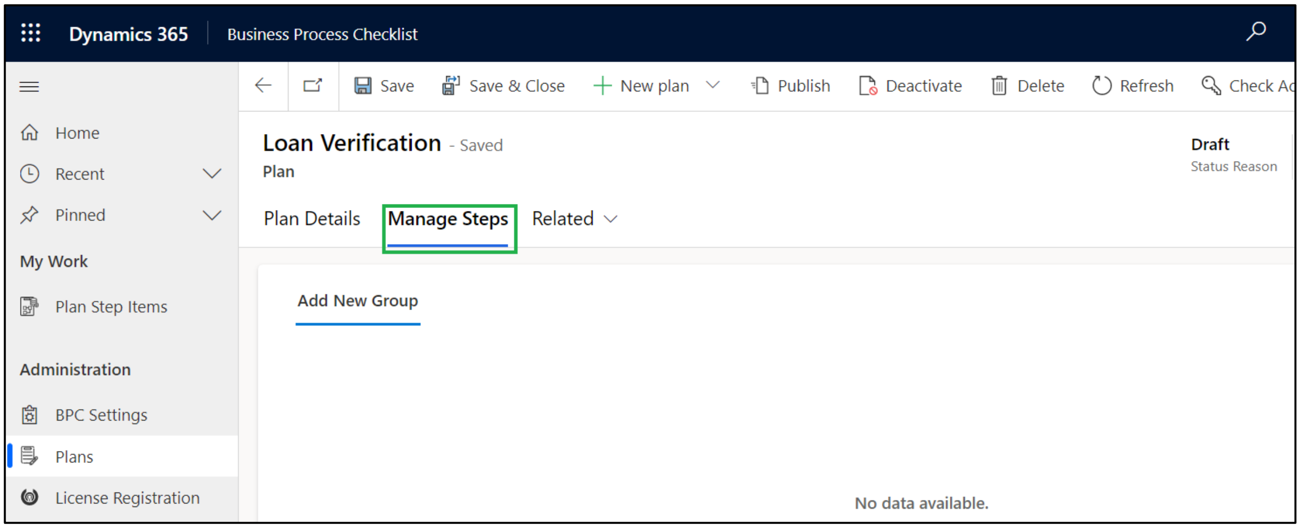


- Once the required fields are filled, click on **'Save'**.

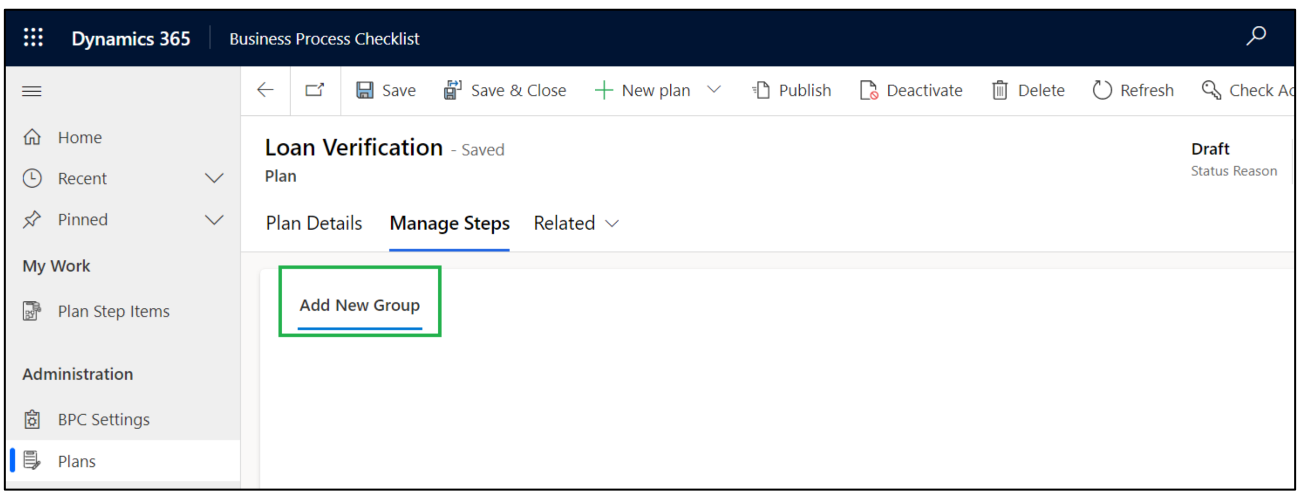


Your Process-Type plan for Custom Groups is created, and now you can add the Plan Steps for the newly created plan. To do the same, follow the steps given below:

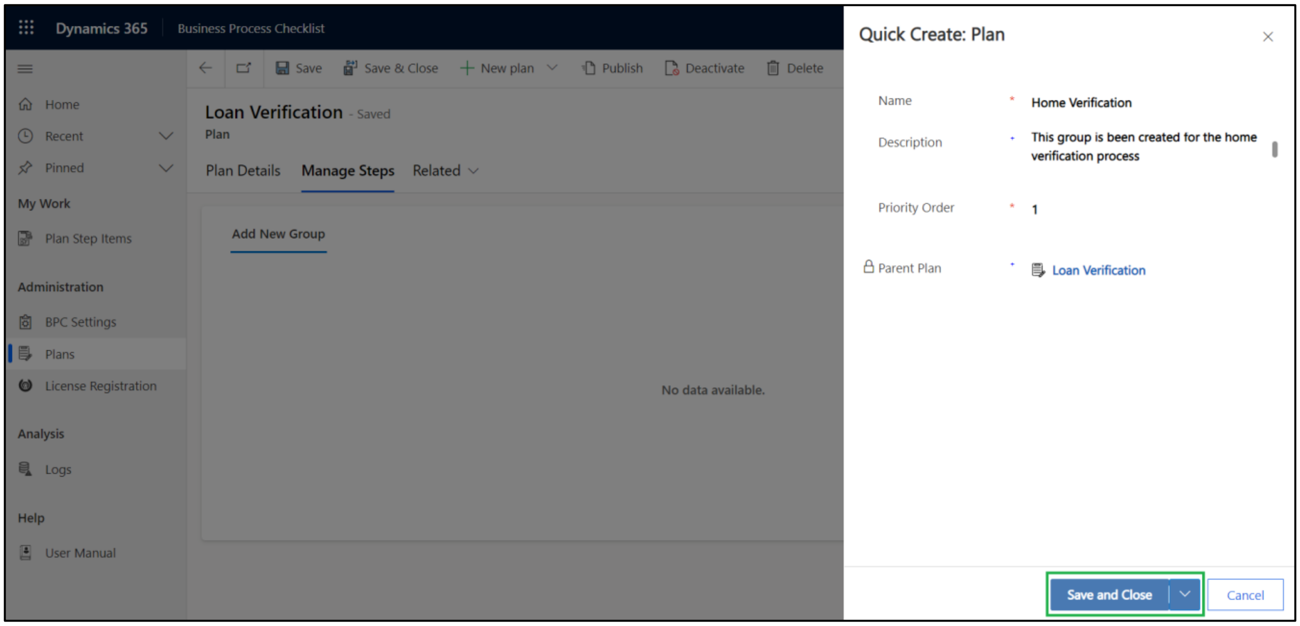
- Navigate to **Manage Steps**.



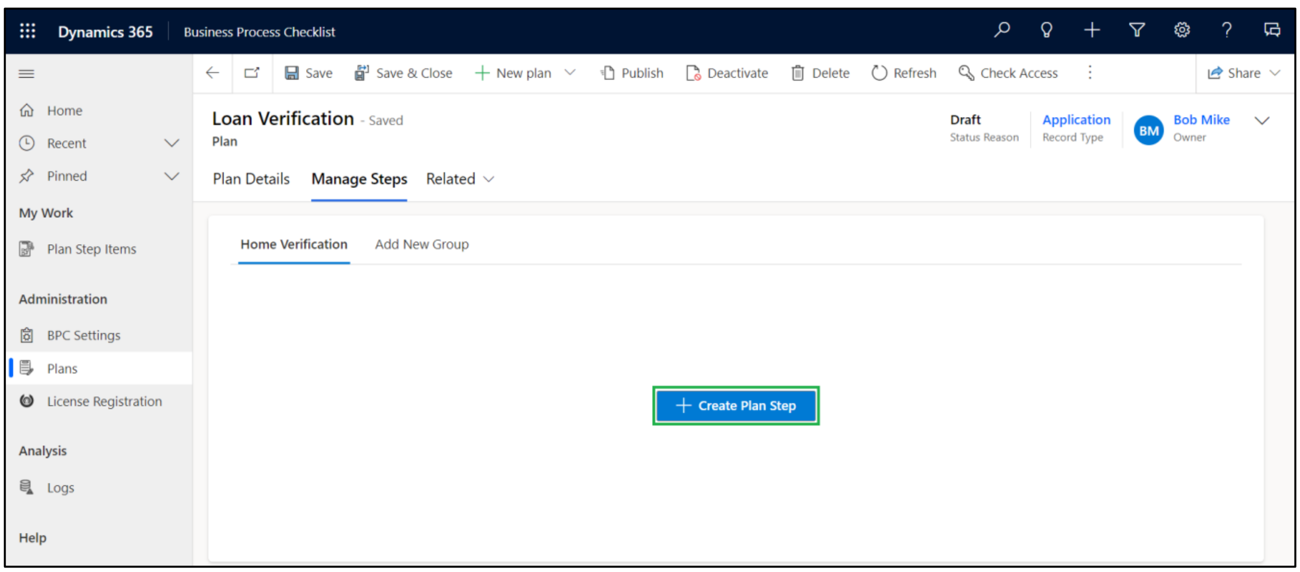
- Click on the **'Add New Group'** button.



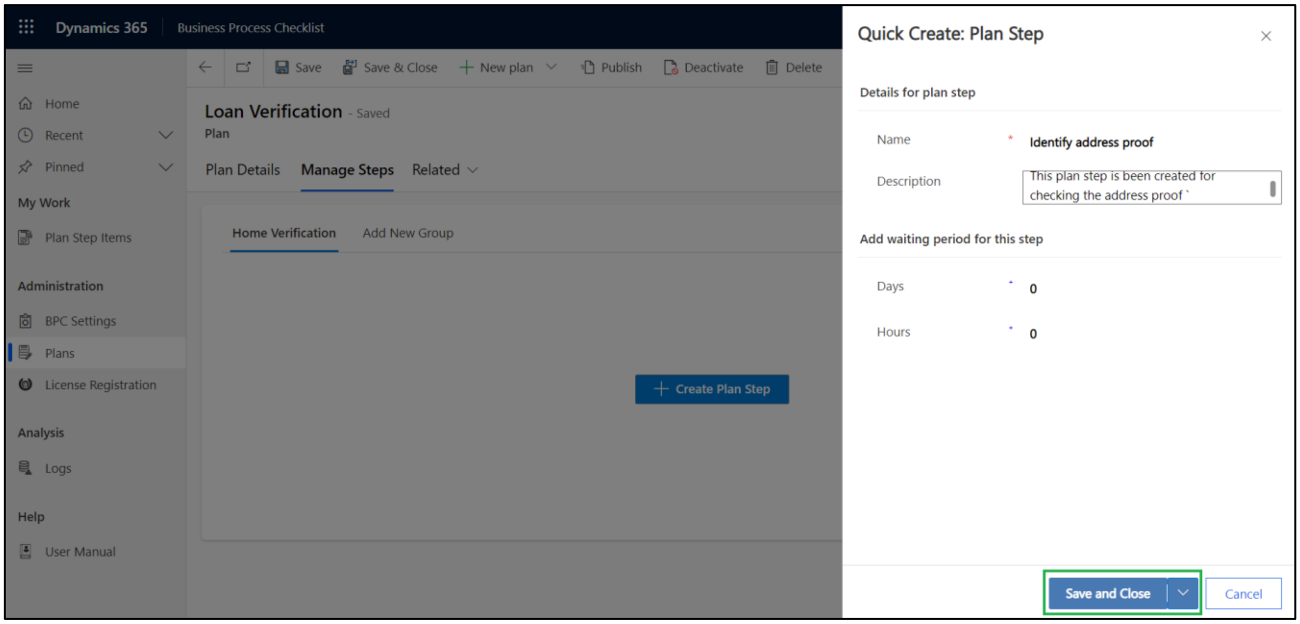
- This will open the **'Quick Create Form: Plan',** where we need to fill in the details**.**
  - **Name:** Provide an appropriate name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Priority Order:** Users can attach multiple plans to a single record, for 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'**.



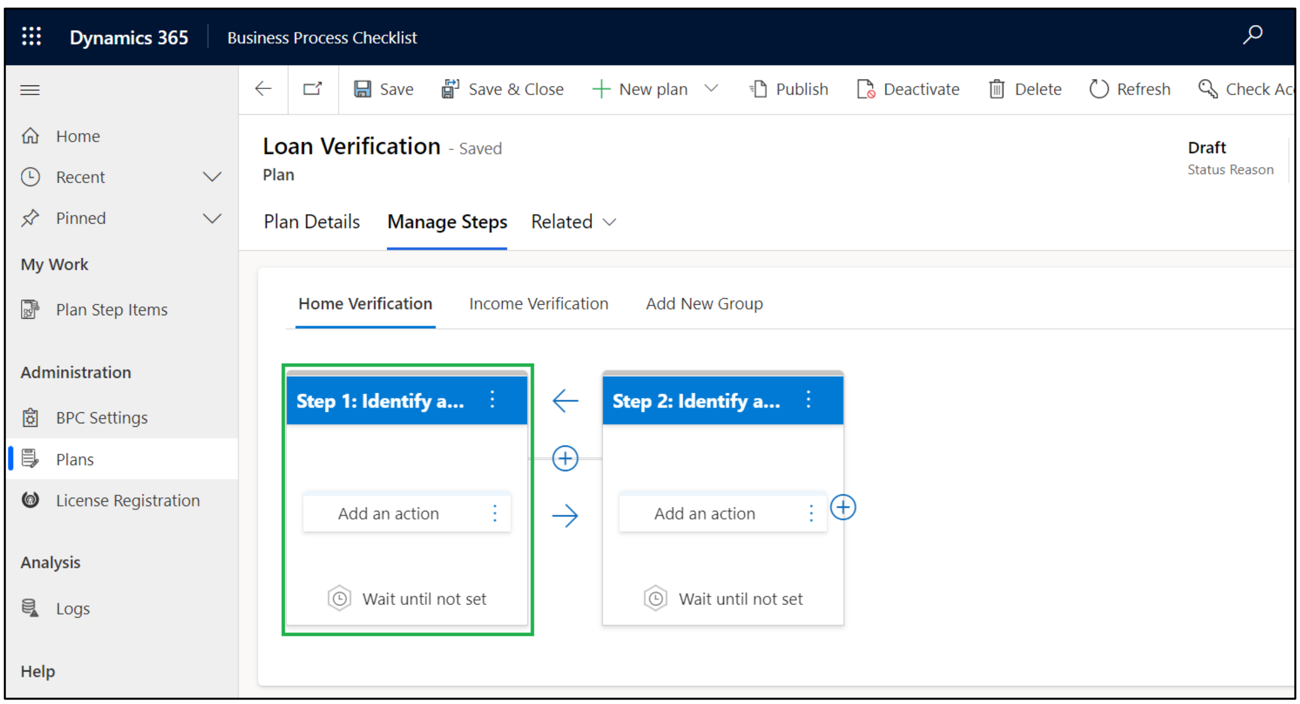
- Click on the **'Create Plan Step'** button.



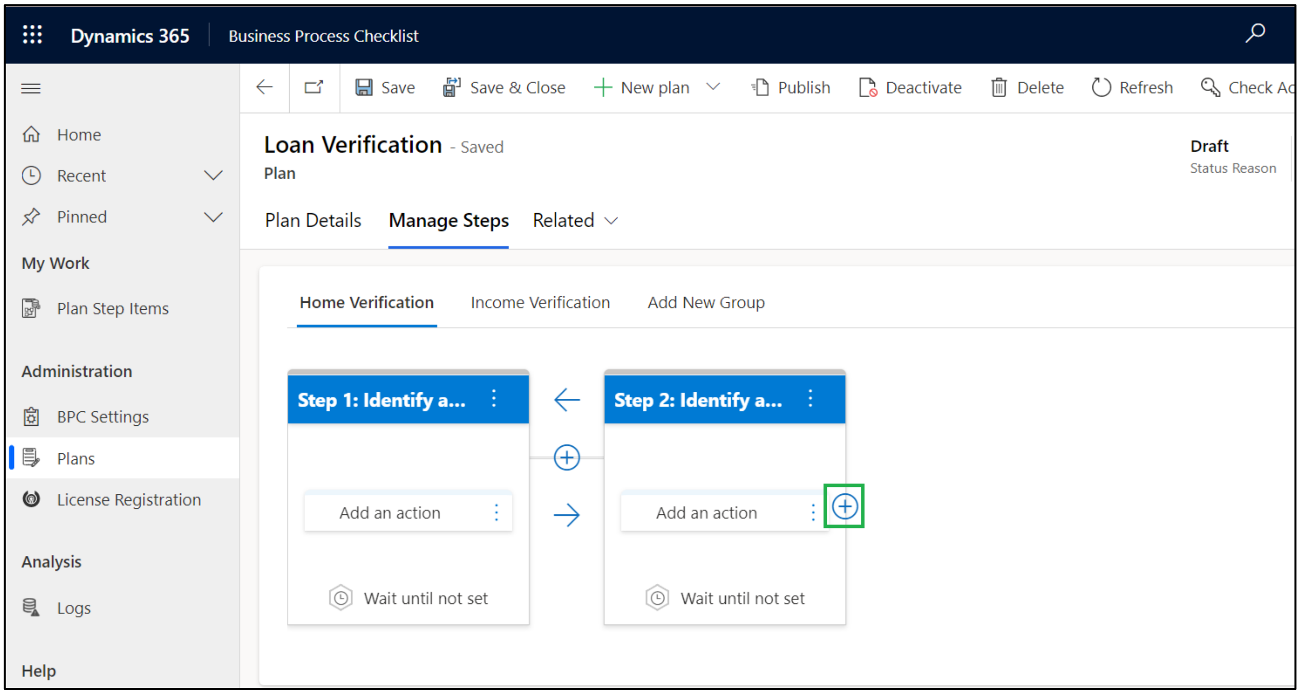
- This will open the **'Quick Create Form: Plan Step',** where we need to fill in the details**.**
  - **Name:** Provide an appropriate name for the Plan Step.
  - **Description (Optional):** Provide a short description of the Plan Step.
  - **Add a waiting period for this step (Optional):** A waiting 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'**.



- 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.

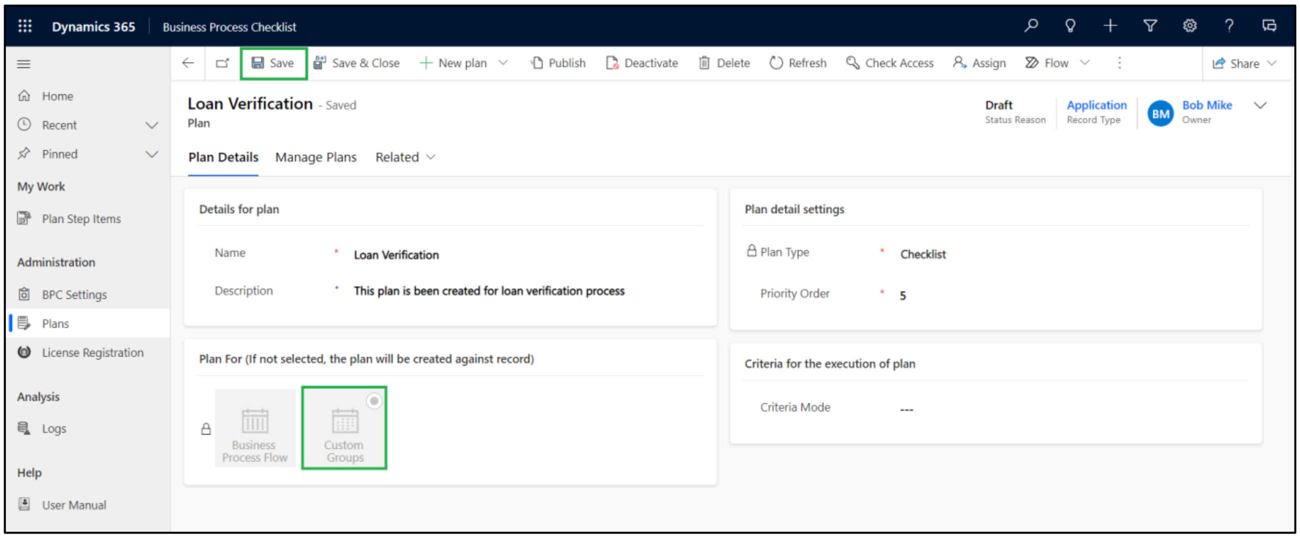
This proves useful for creating flexible plans for Custom Groups where your salesperson can perform tasks based on their requirements of the business process, irrespective of the order of tasks set in the plan.

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.

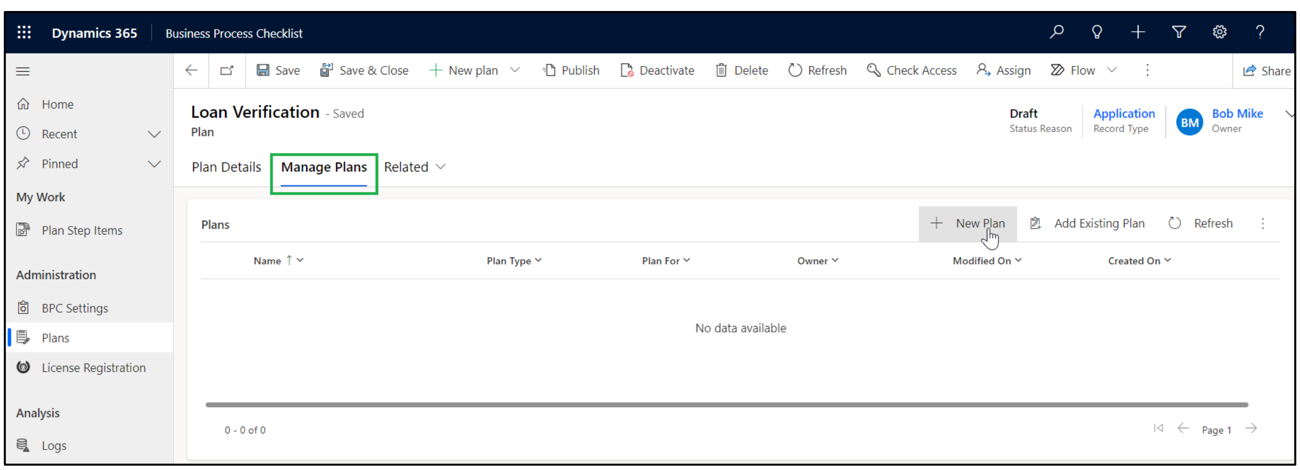
- **Set criteria for the execution of the Plan (Optional):** Set the criteria against the plan (the plan will automatically attach against those for which the criteria match). Select either **Simple** or **Advanced**.
  - **Simple:** Execute plans based on the conditions defined in view of an entity.
  - **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'**.

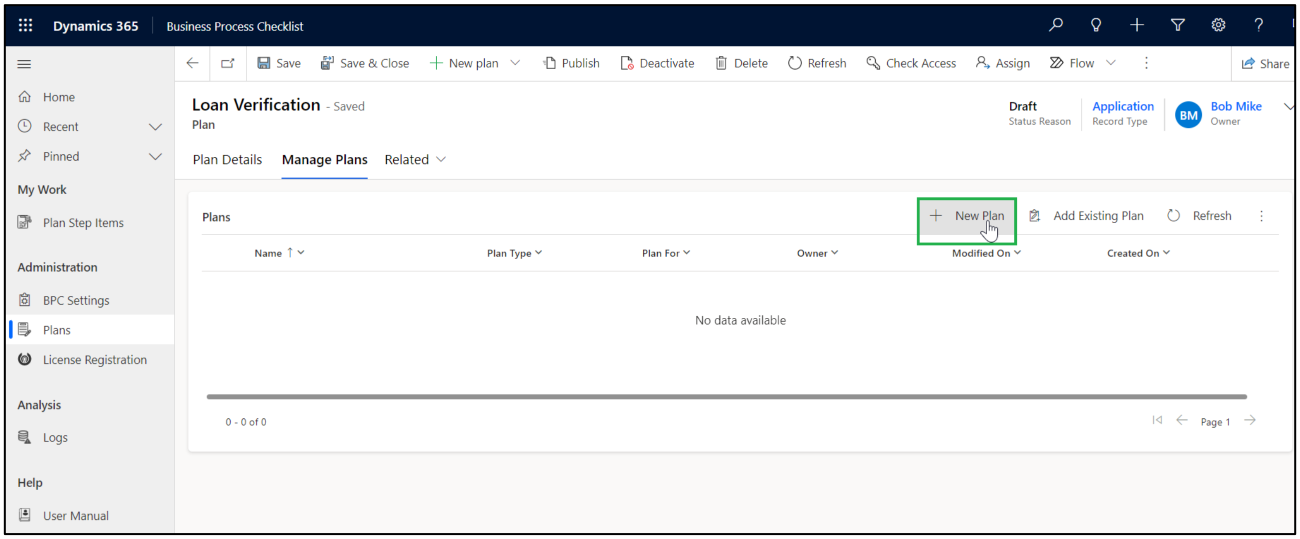


Your Checklist-Type plan for Custom Groups is created, and now you can add the Plan Steps for the created plan. To do the same, follow the steps given below:

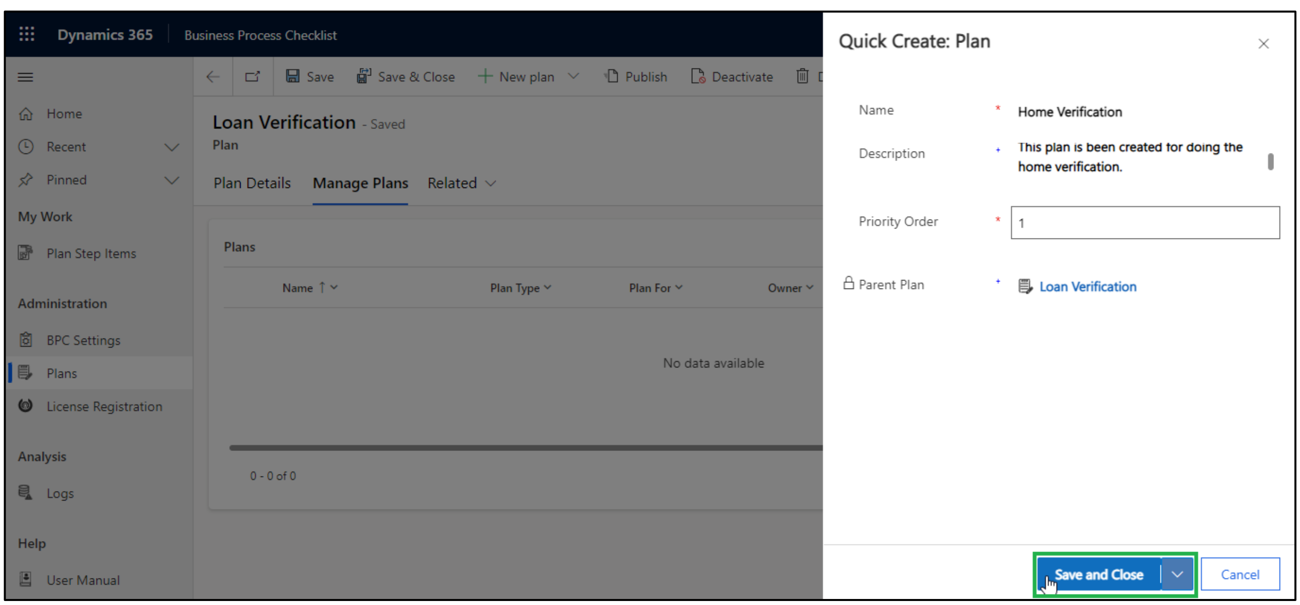
- Navigate to **Manage Plans**.



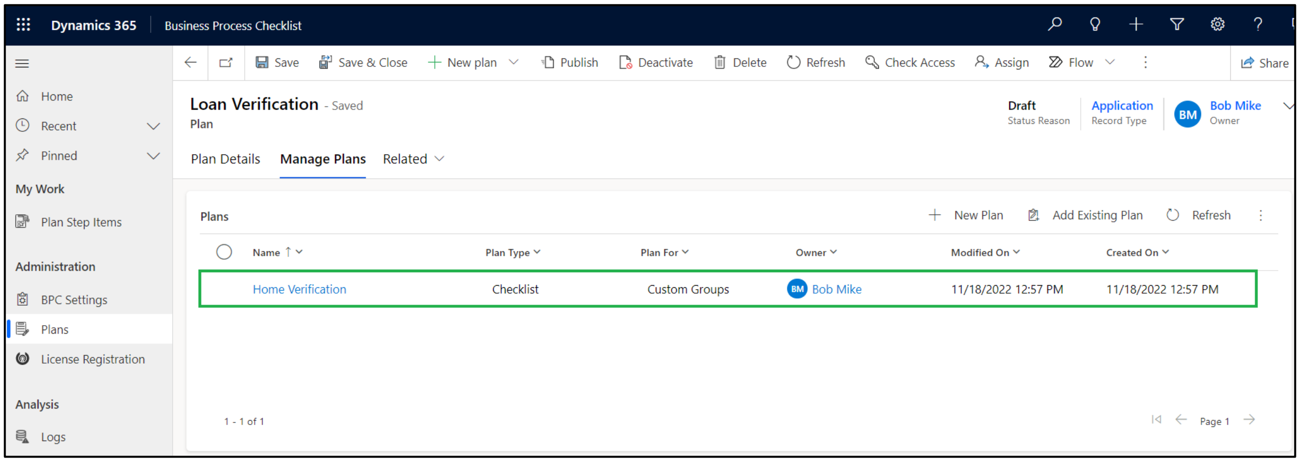
- Click on the **'New Plan'** button.



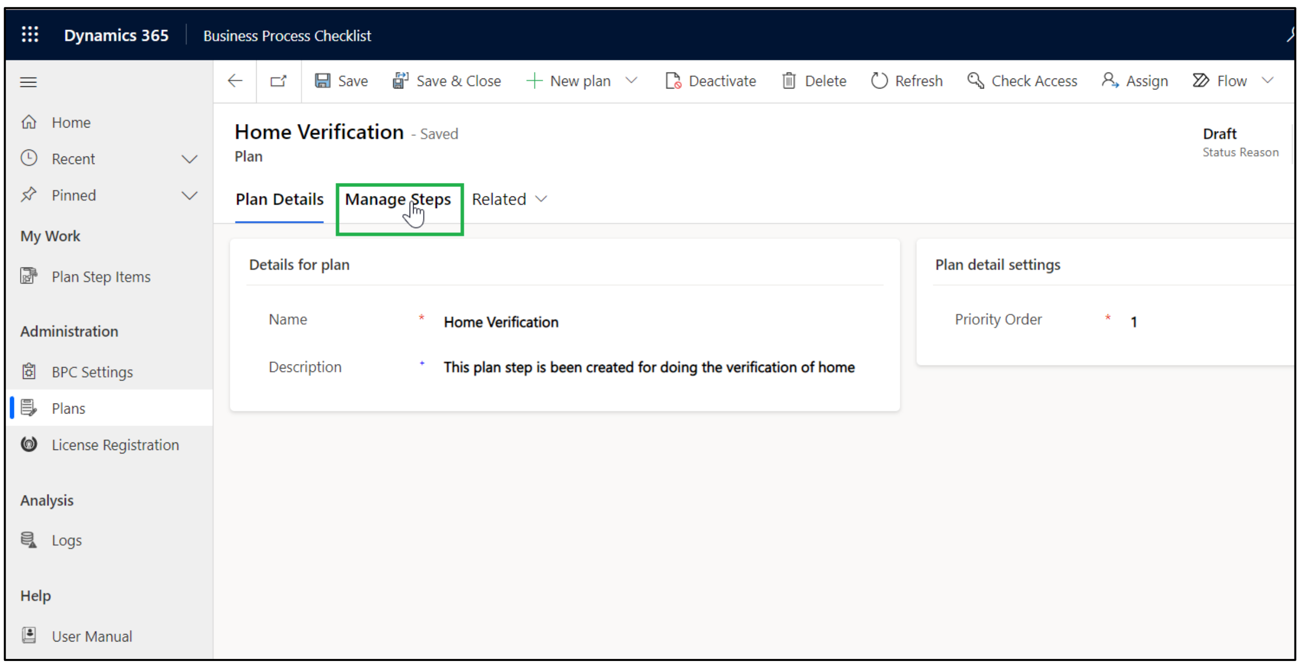
- This will open the **'Quick Create Form: Plan',** where we need to fill in the details.
  - **Name:** Provide an appropriate name for the plan.
  - **Description (Optional):** Provide a short description of the plan.
  - **Priority Order:** Users can attach multiple plans to a single record, for which 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'.**



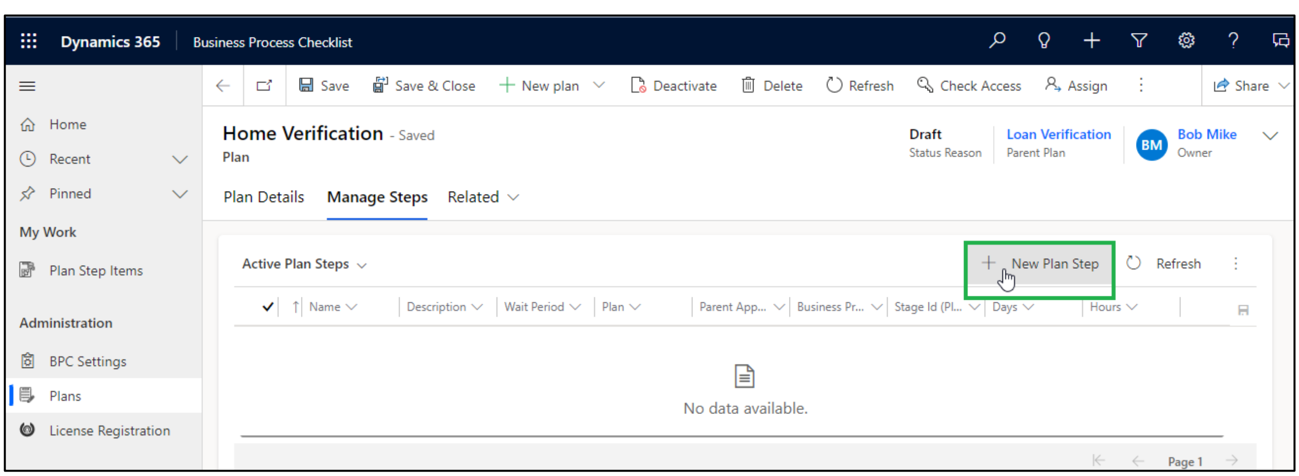
- Your **Child plan** will be added to plans.
- Now click on the **Child plan**.



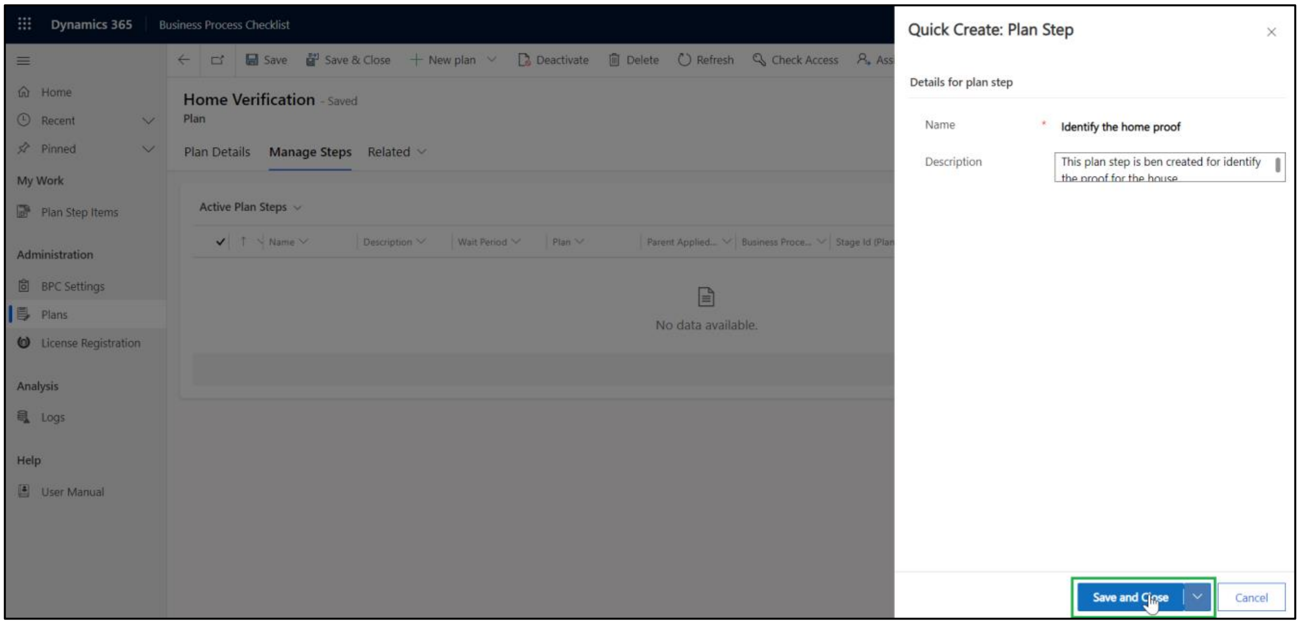
- Navigate to **Manage Steps.**



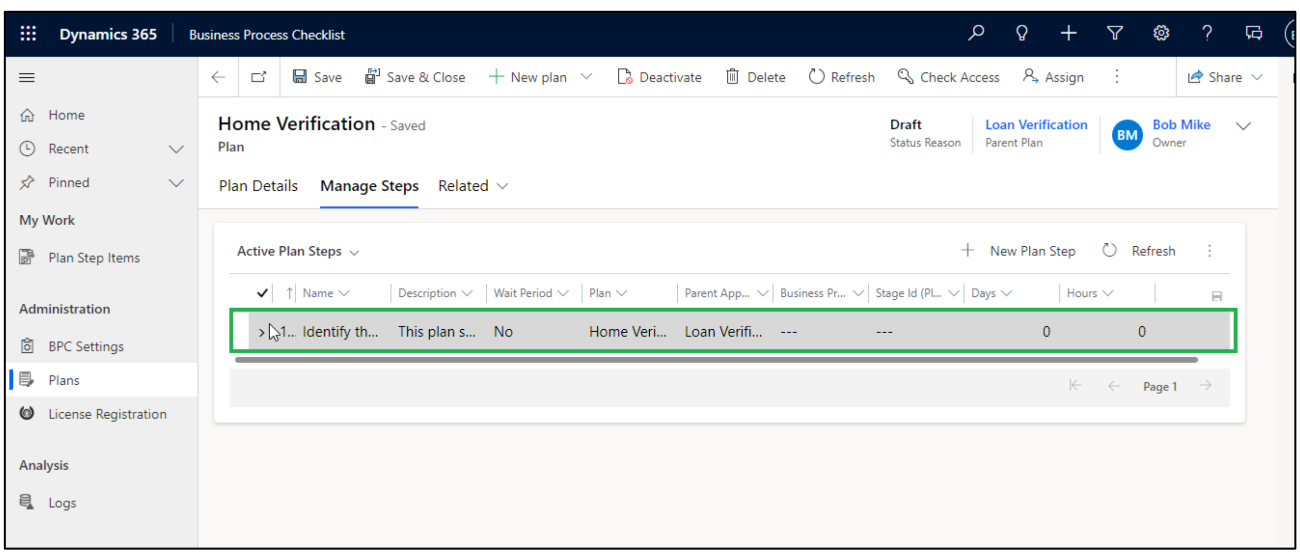
- Click on the **'New Plan Step'** button.



- 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 (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.

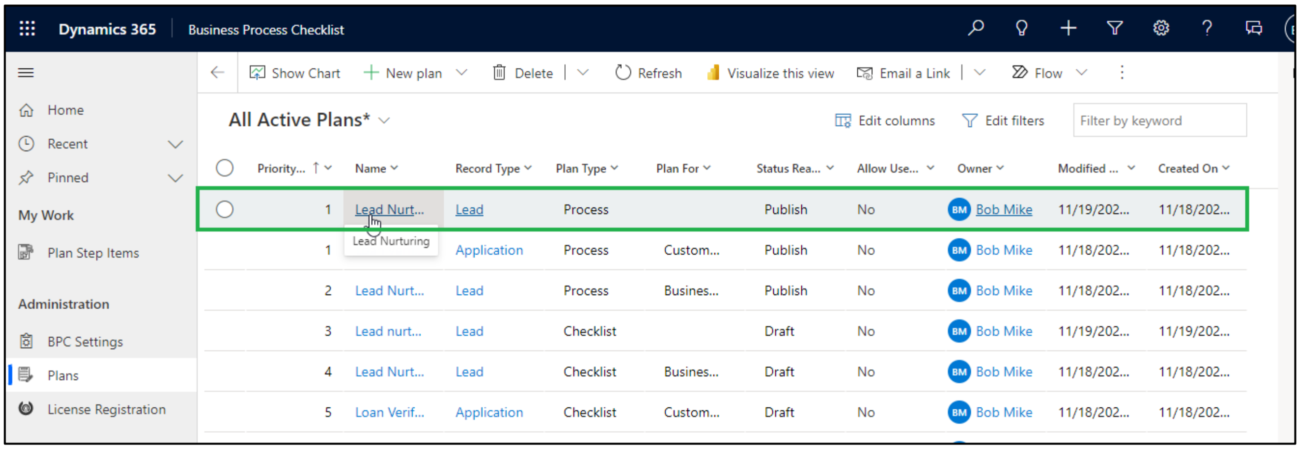
To revise existing published Plans for both Process and Checklist-Type plans, follow the steps given below:

Revise Plan - Process:

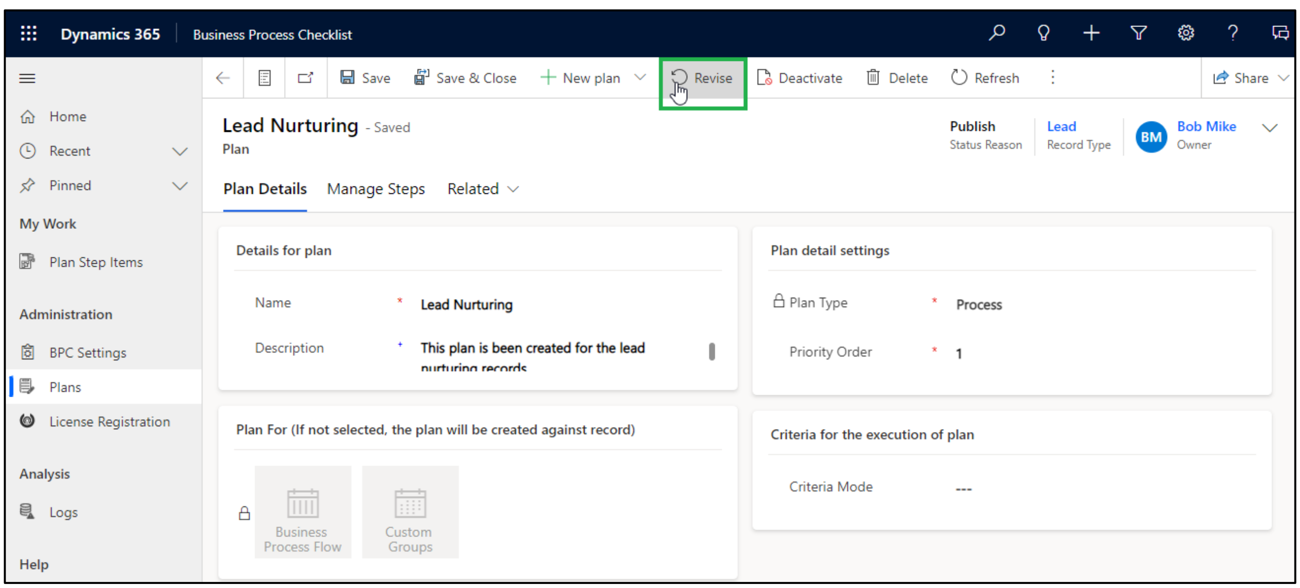
To revise Process-Type plans, plan steps and plan step actions follow the steps given below:

Plan

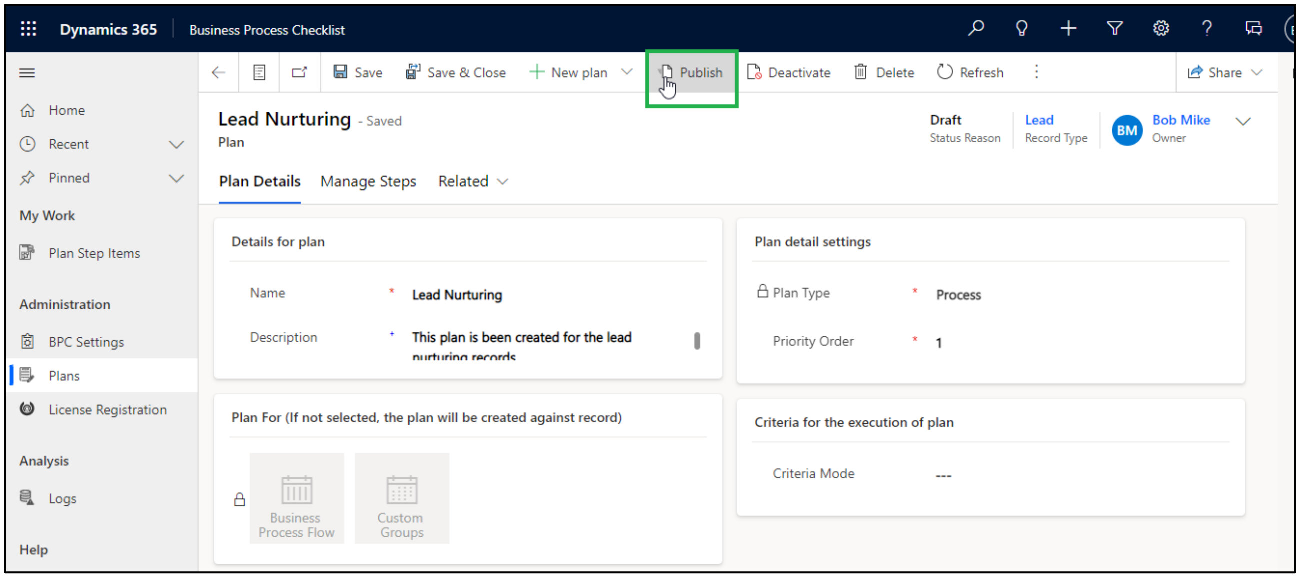
- To revise existing published plans, navigate to **Plans --> Open existing published plan**.



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

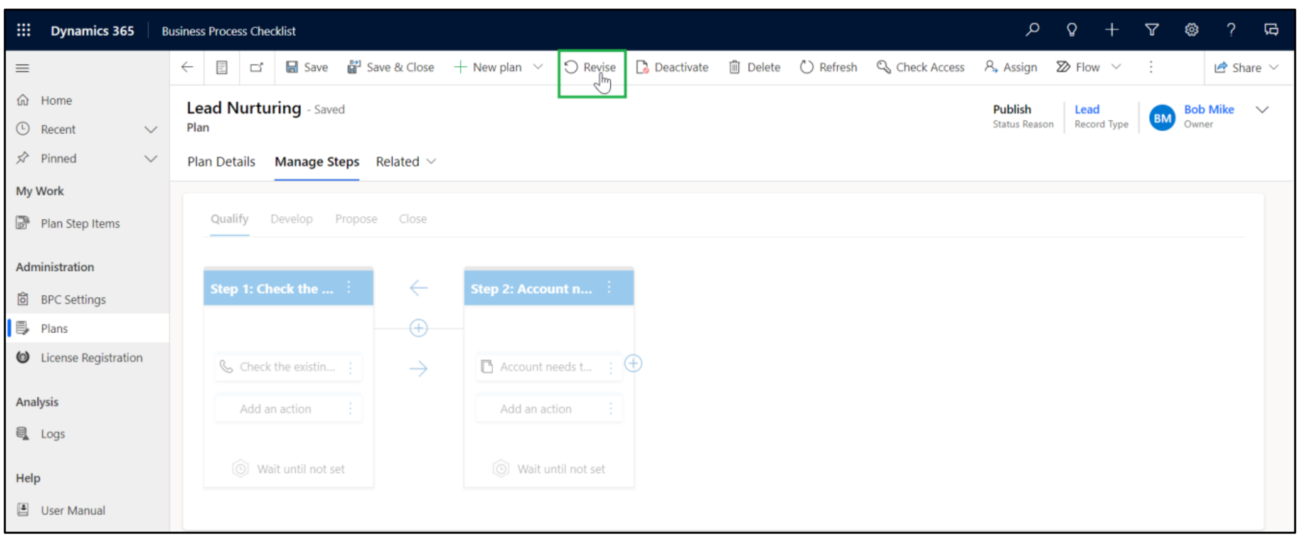


- Make the required changes to the plan **-->** Click on the **'Publish'** button.

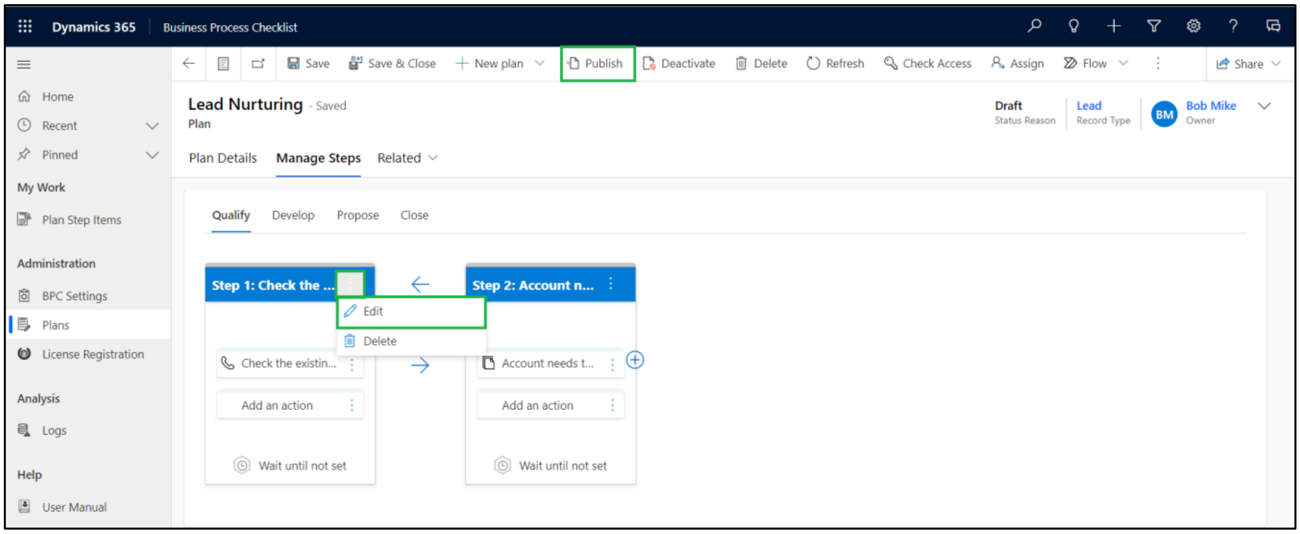


Plan steps

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

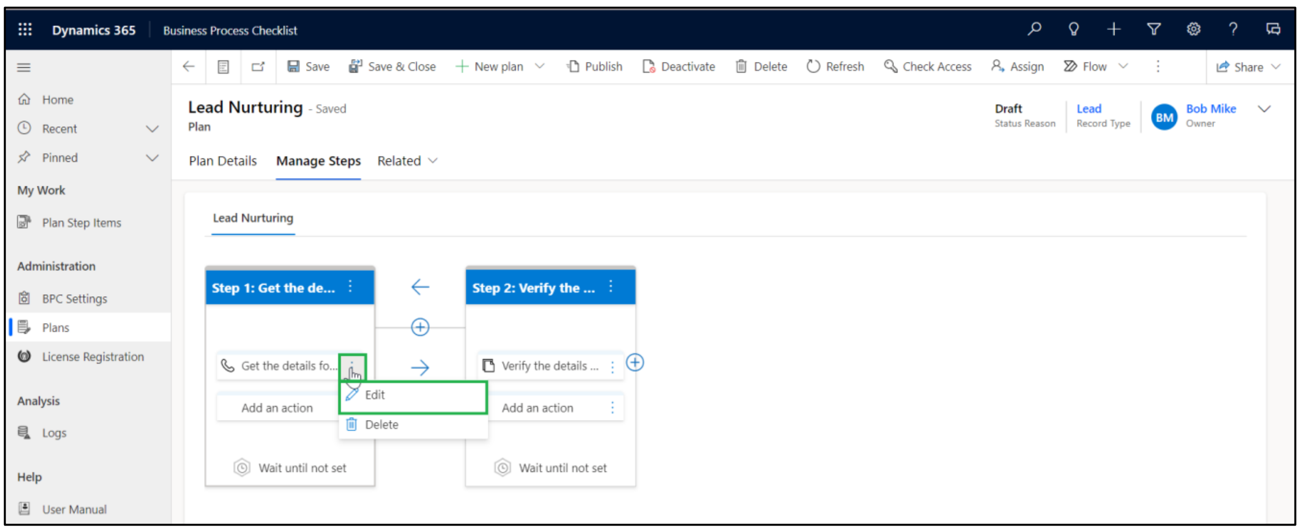


- Click on the **ellipsis -->** Click on **'Edit'**.
- Make the required changes to the plan step **-->** Click on the **'Publish'** Button.

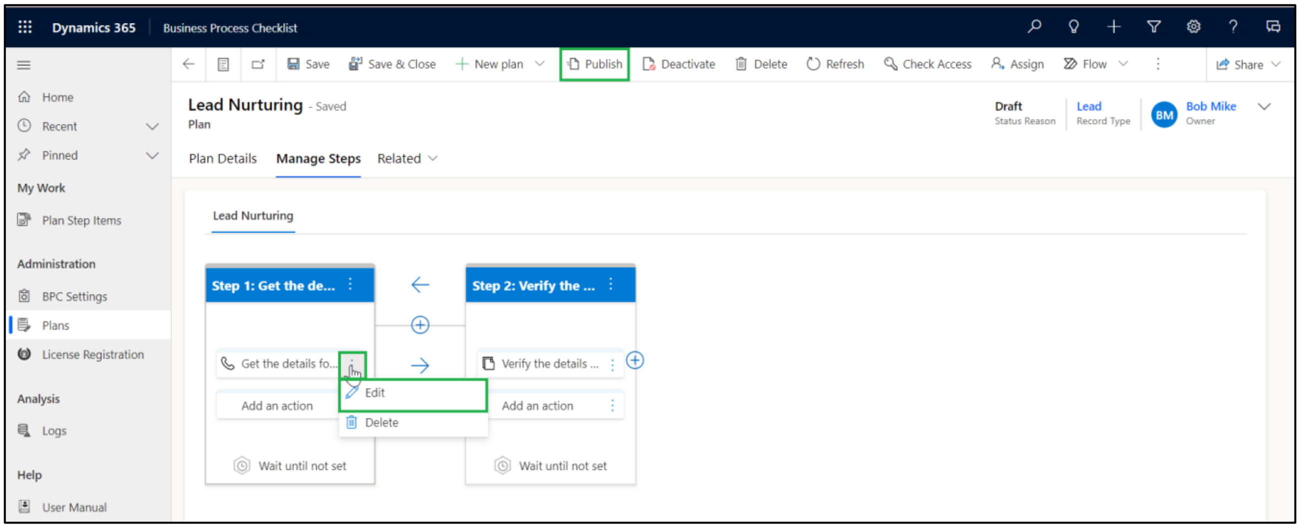


Plan Step Action

- 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.



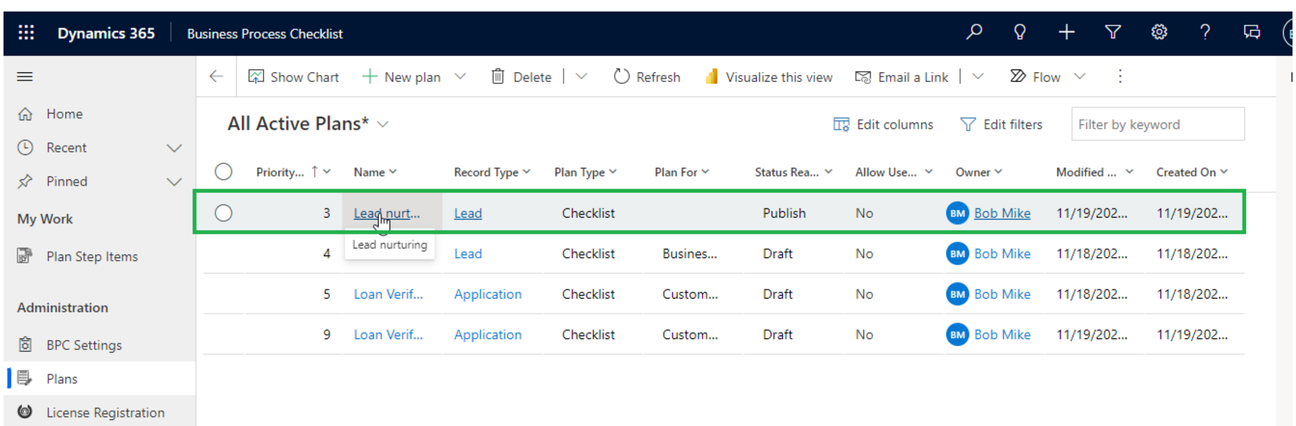
In this way Process-Type plan, plan steps and plan step actions can be revised to suit the business requirement.

Revise Plans-Checklist:

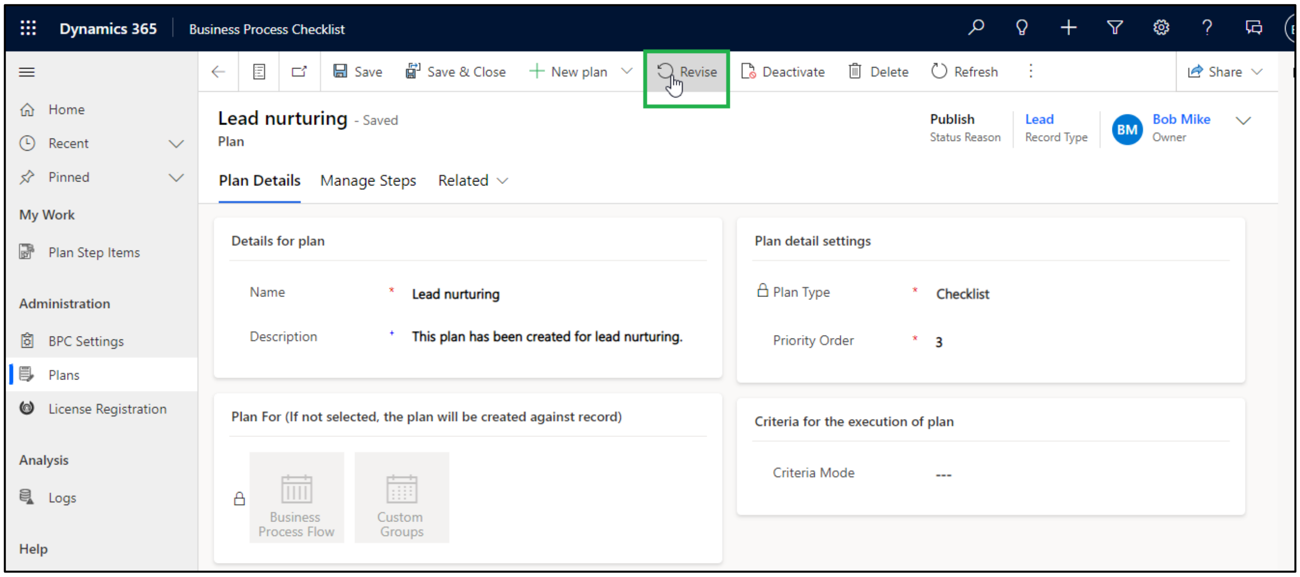
To revise Checklist-Type plans and plan steps follow the steps given below:

Plan

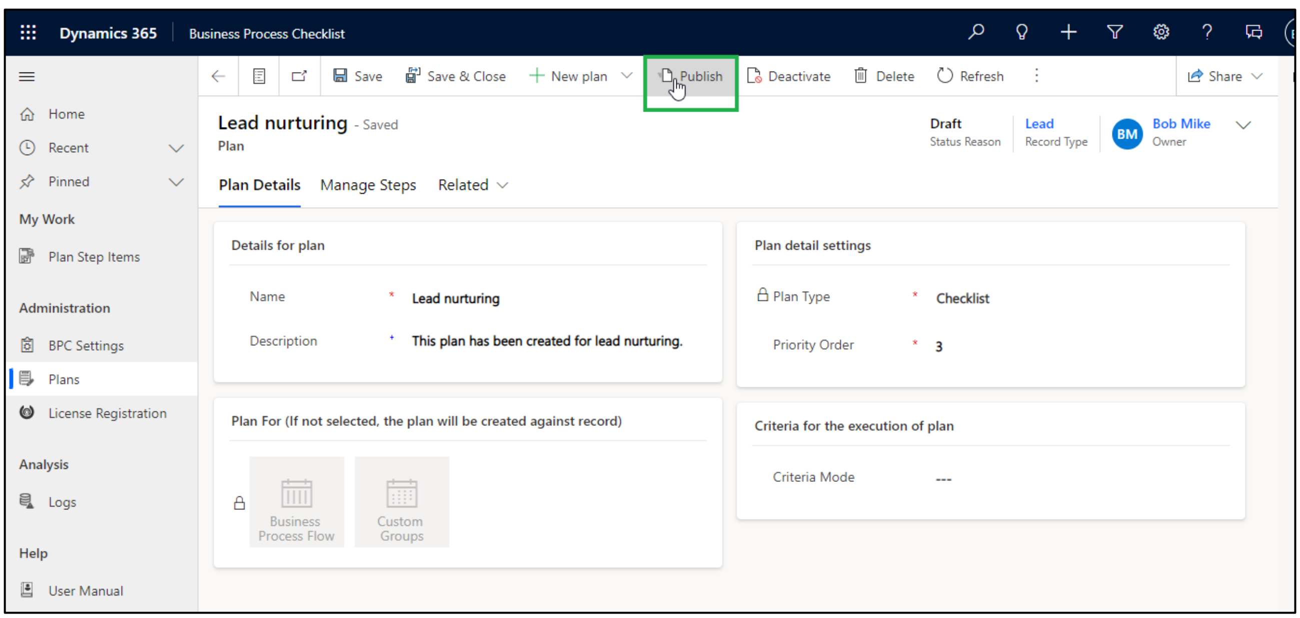
- To revise existing published plans, navigate to **Plans --> Open existing published plan**.



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

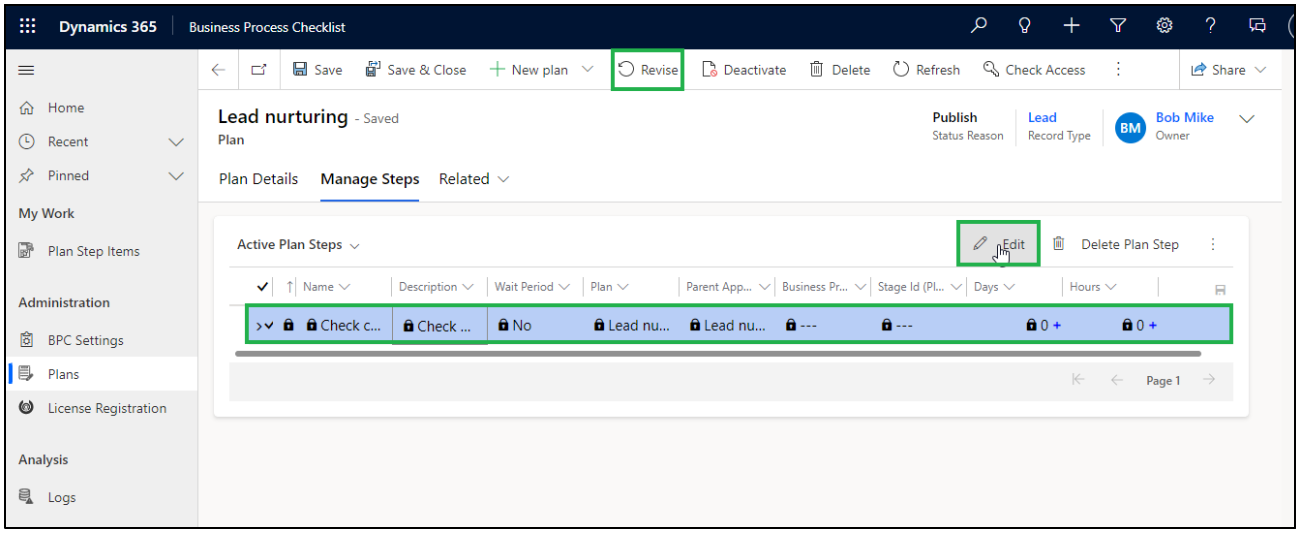


- Make the required changes to the plan **-->** Click on the **'Publish'** button.

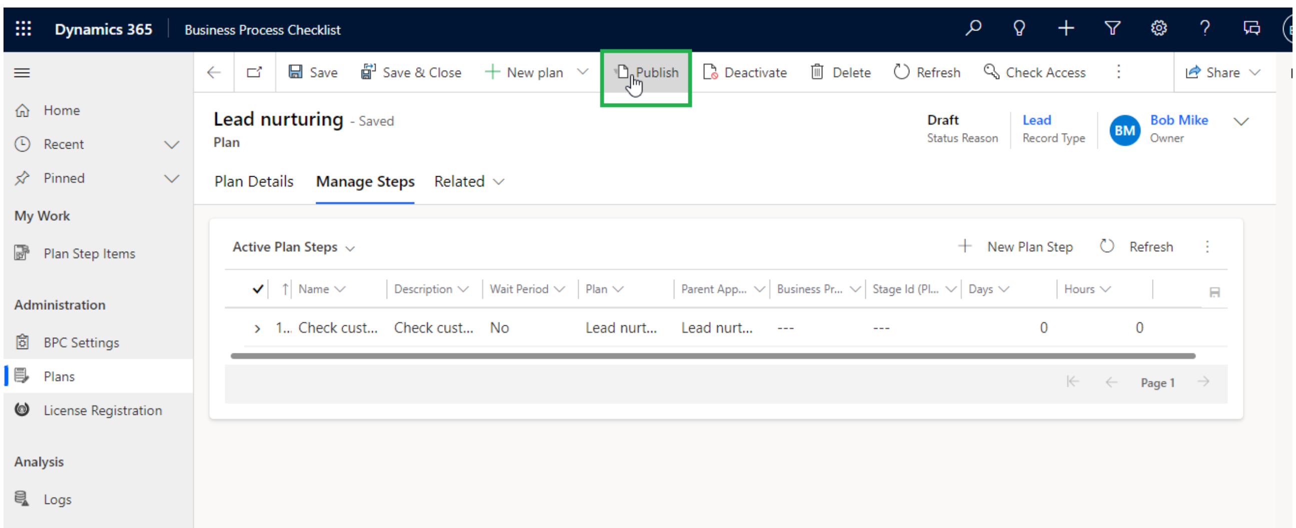


Plan Step

- 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**.



- 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.

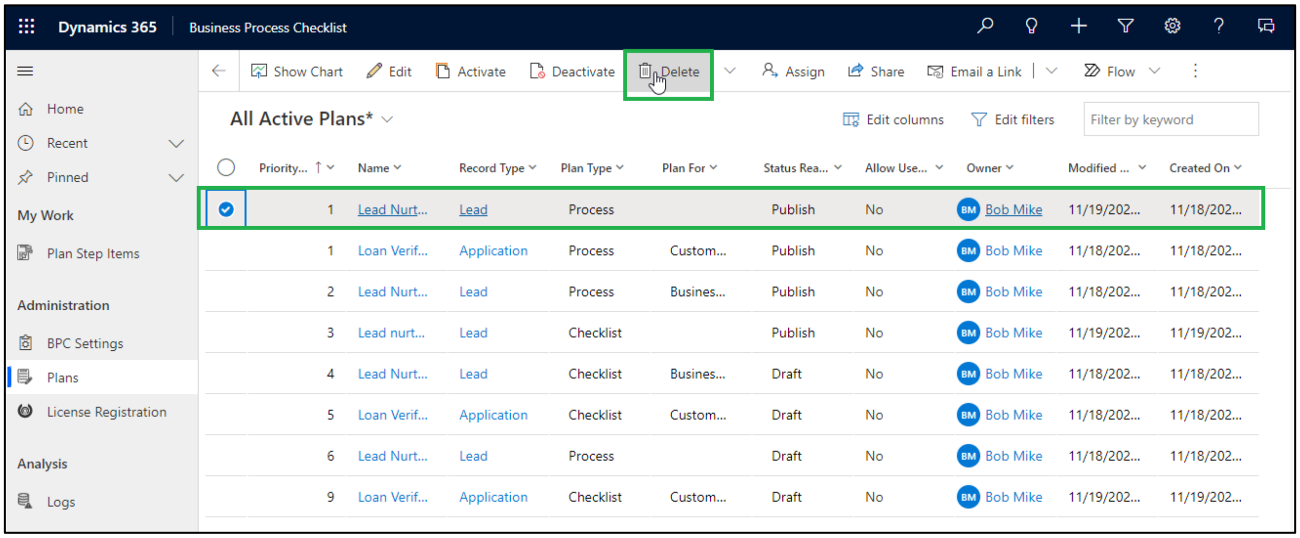
To delete existing Plans, Plan Steps, and Plan Step Actions for both Process and Checklist-Type plans, follow the steps given below:

Delete Plan - Process:

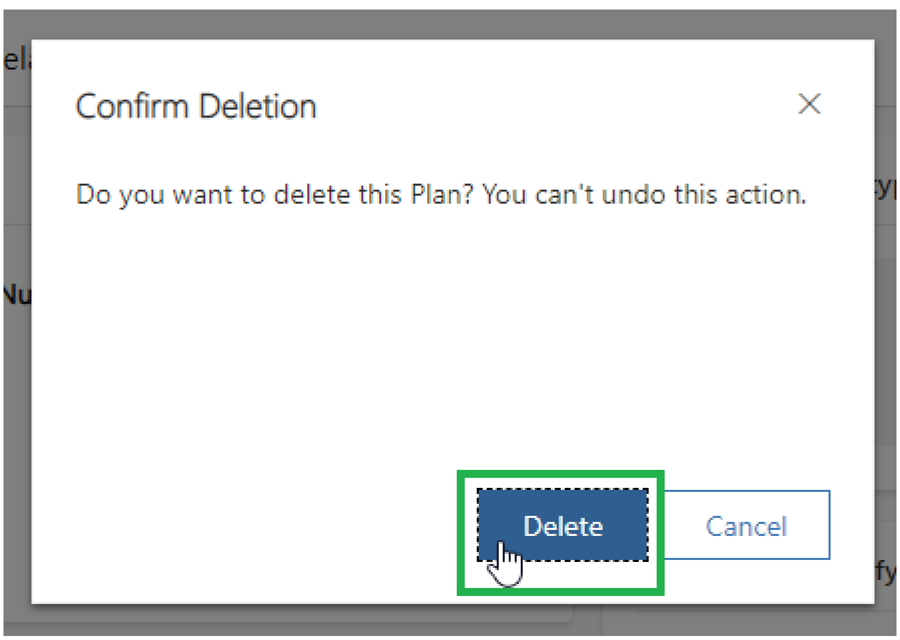
To delete Process-Type plans, plan steps and plan step actions follow the steps given below:

Plan

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



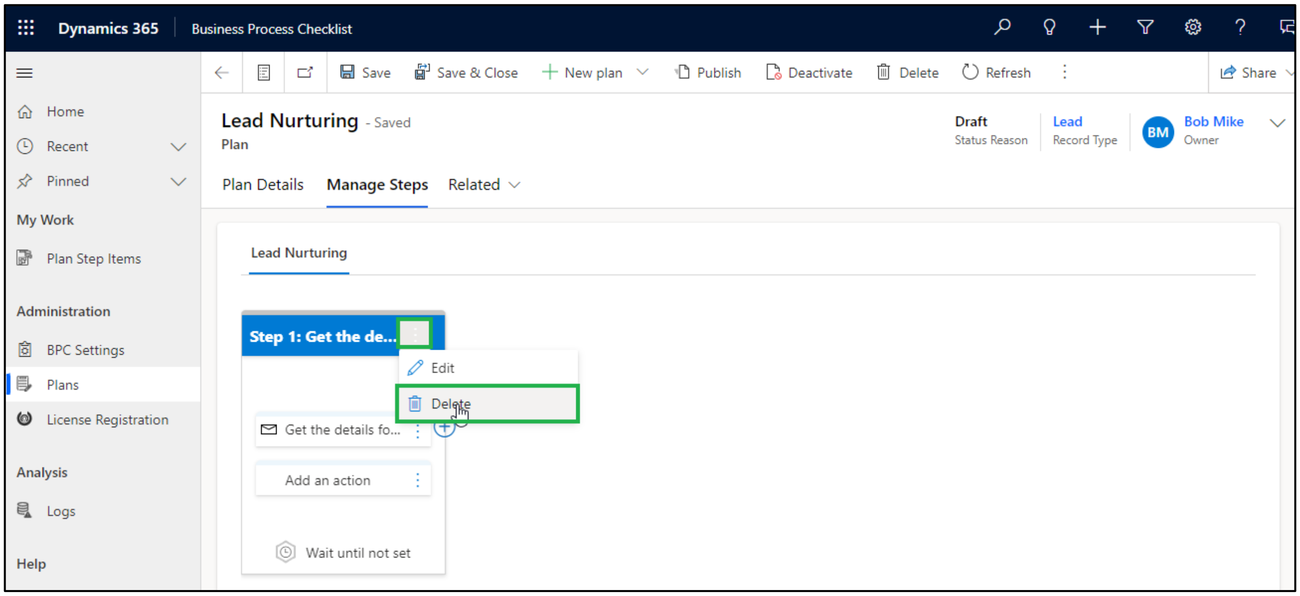
- Click on **'Delete'.**



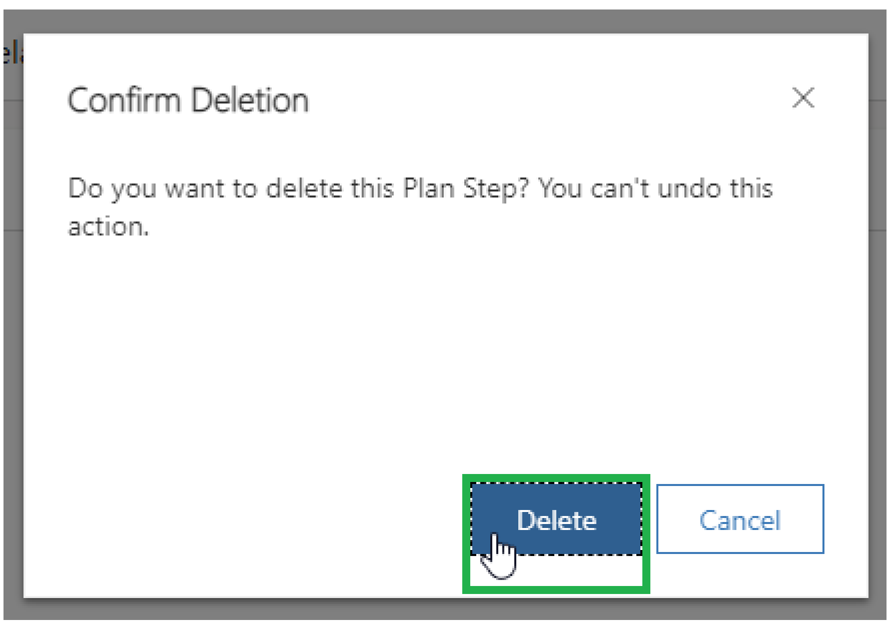
Note: If a plan is deleted, then the associated Plan steps and Plan Step Actions will also be deleted.

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.



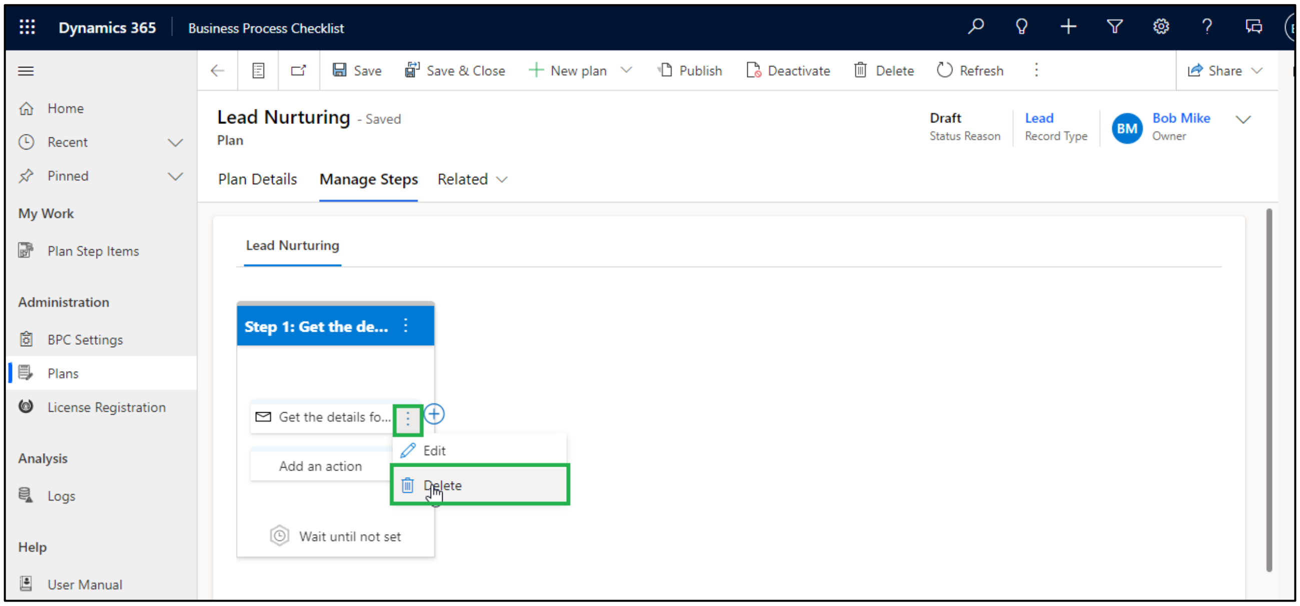
- Click on **'Delete'**.



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'**.



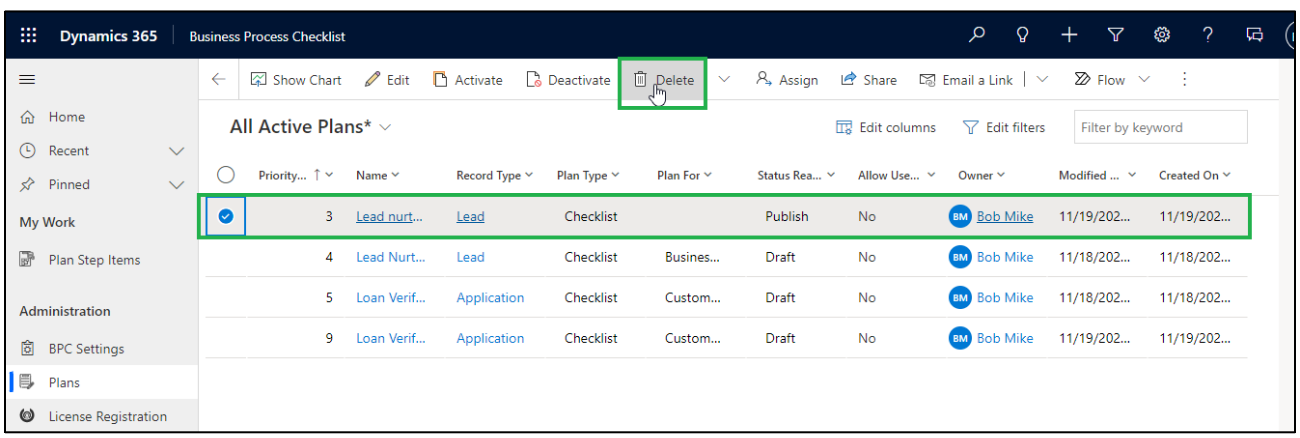
In this way **Process-Type** plan, plan steps and plan step actions that are no longer in use can be deleted.

Delete Plan - Checklist:

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

Plan

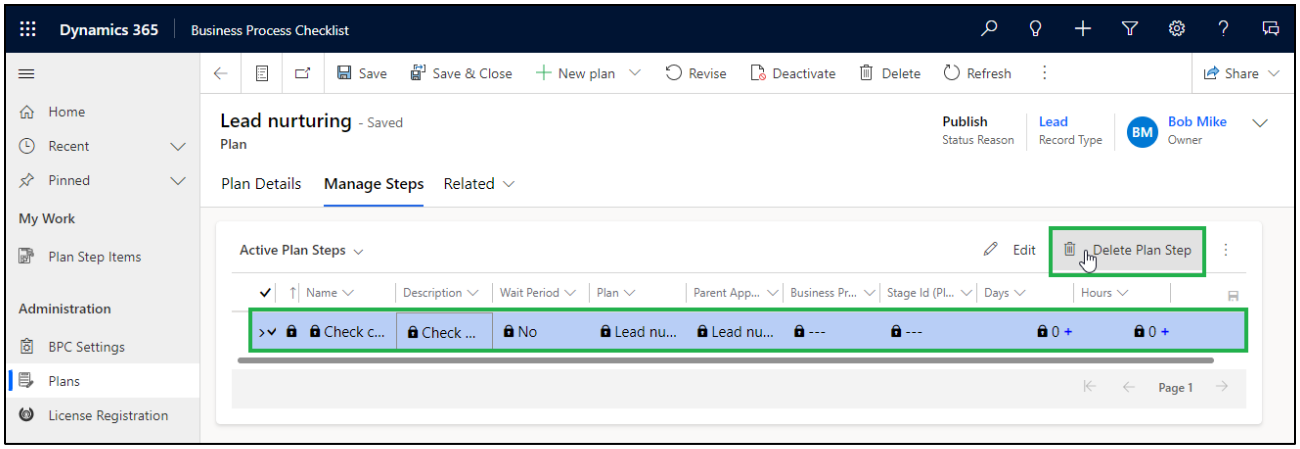
- To delete plans, navigate to **--> Plans --> Select** the **Existing Plan** you want to delete --> Click on the **'Delete' Button**.



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'**.



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):

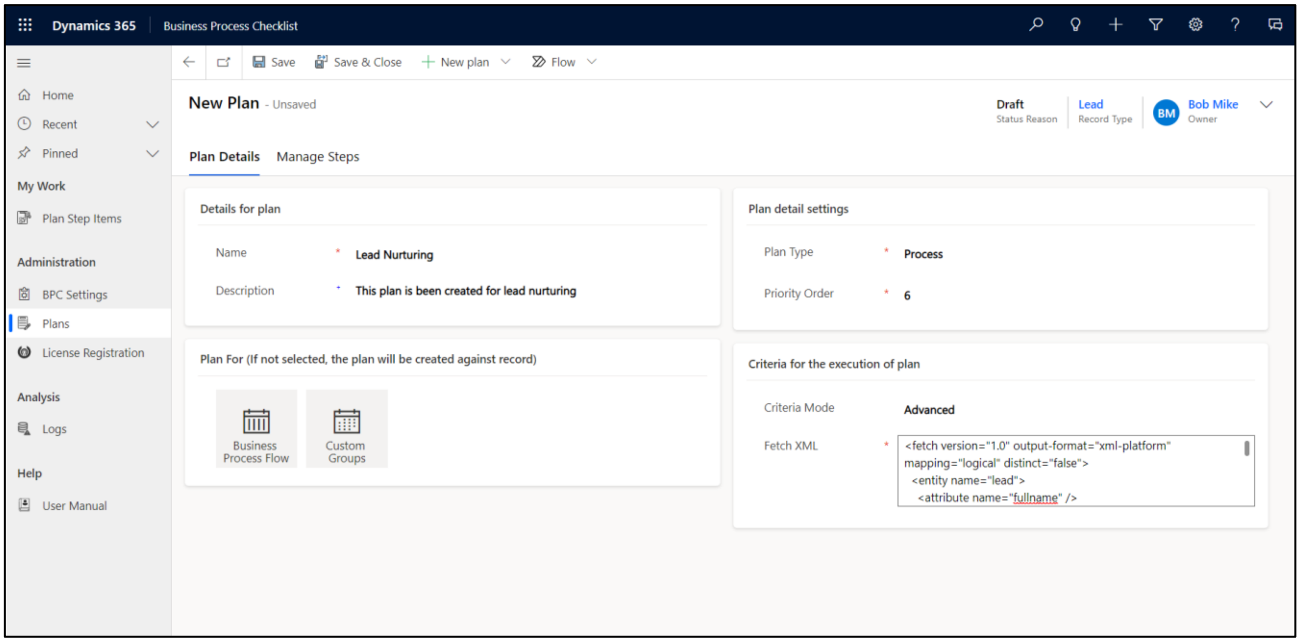
- Auto Attach the Plan to Record
- View Record Details
- View Plan Details
- View Plan Items on Record

Auto-Attach the Plan to Record

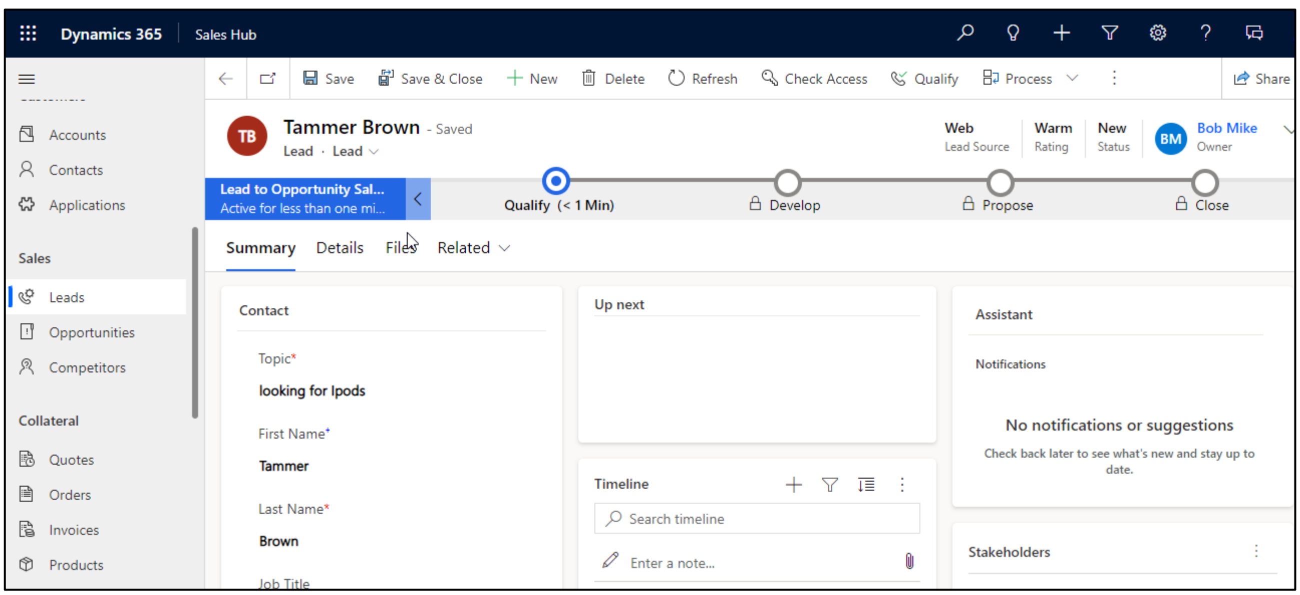
Plans defined by the manager will automatically get attached to the records as per the matched criteria. And whenever a new record will be created in the chosen record type the set plan for it will automatically get connected to the newly created record.

Below is an example:

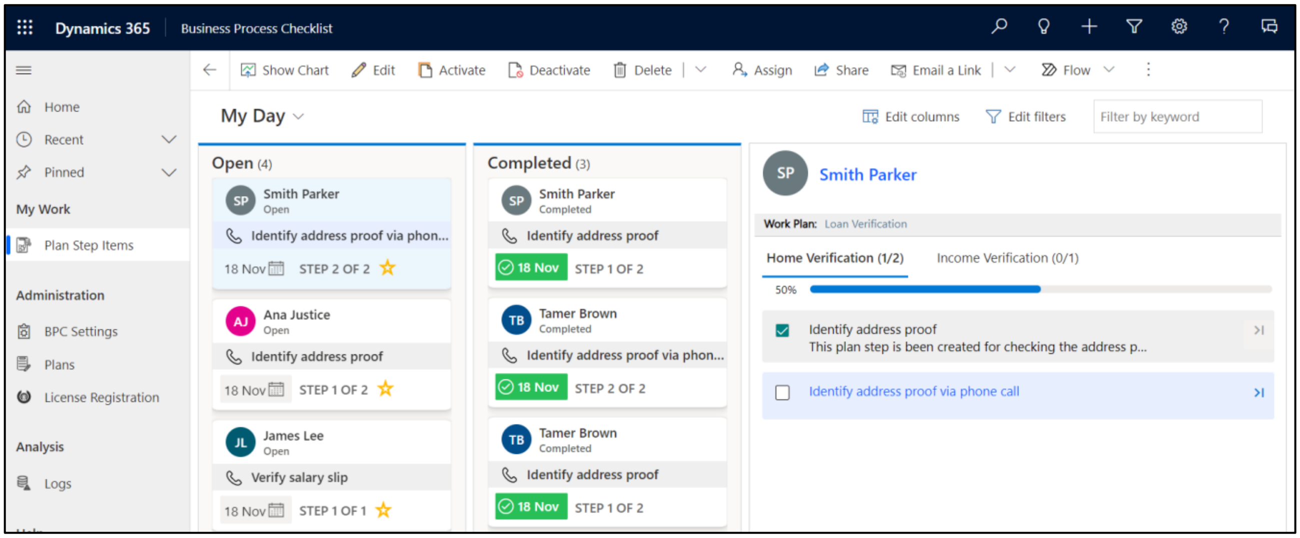
- Suppose the manager has created a plan for lead nurturing for the lead entity, where the criteria are set as lead source as **"Web".**



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

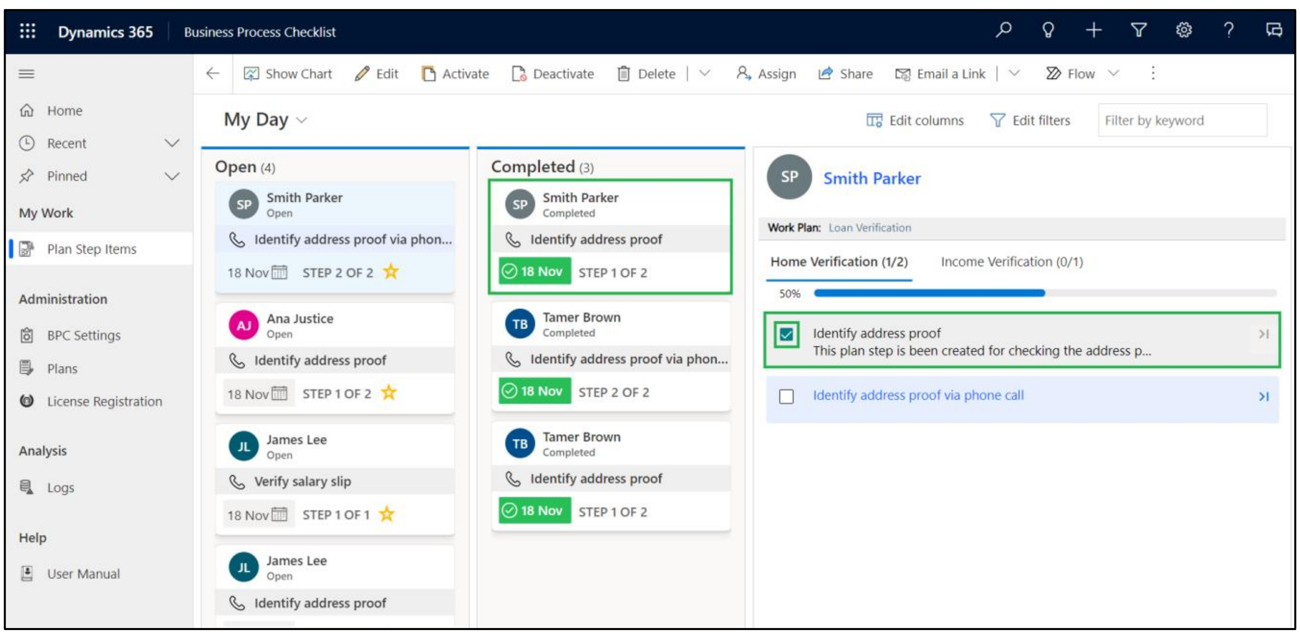


- So, whenever the lead is created with the lead source as **"Web"** then the lead nurturing plan will get attached to that lead record.

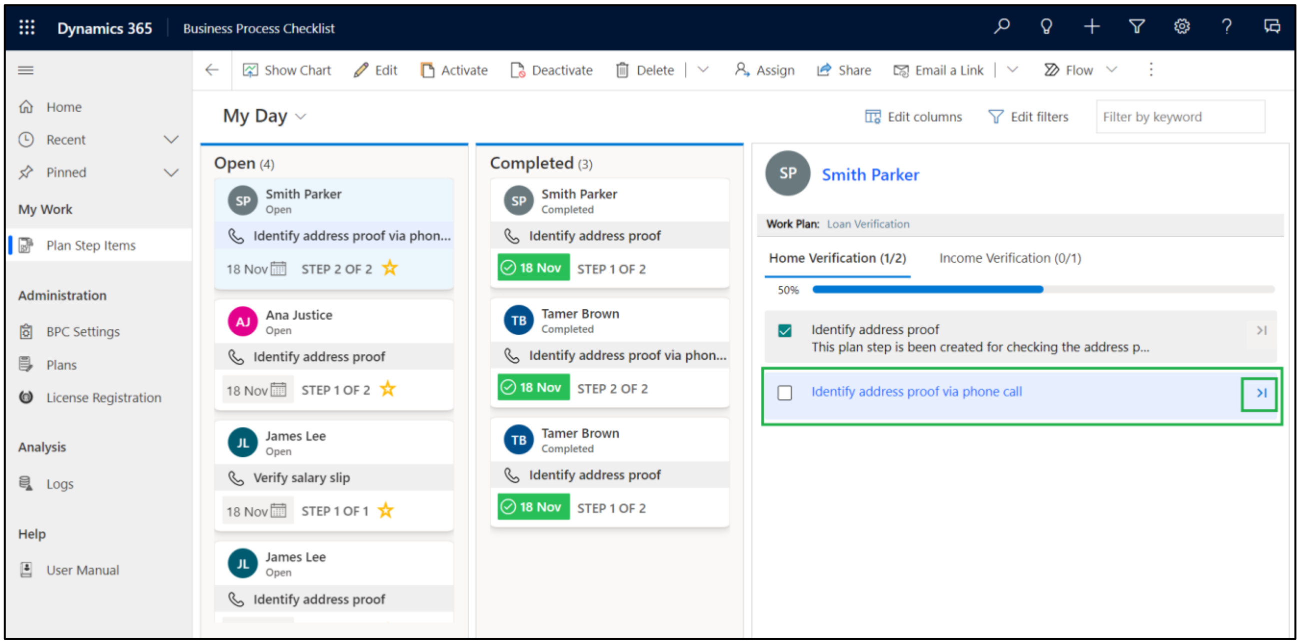


Miscellaneous Features:

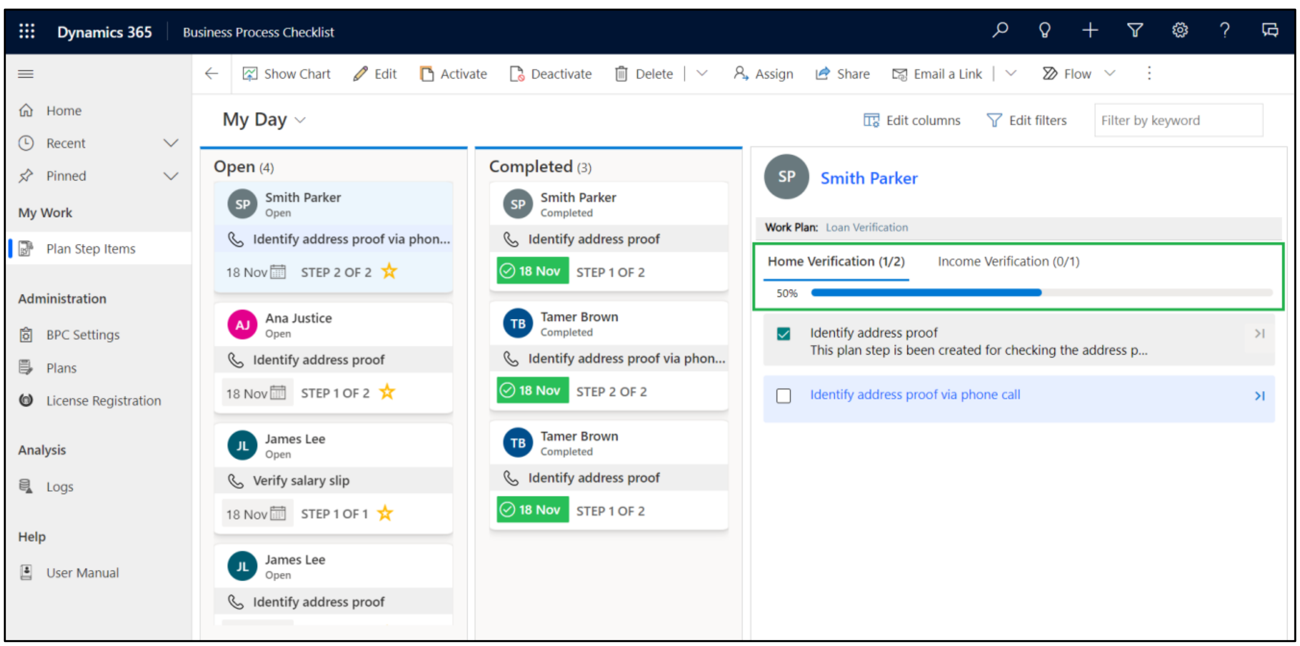
- The action can be completed by clicking on the **checkbox.**



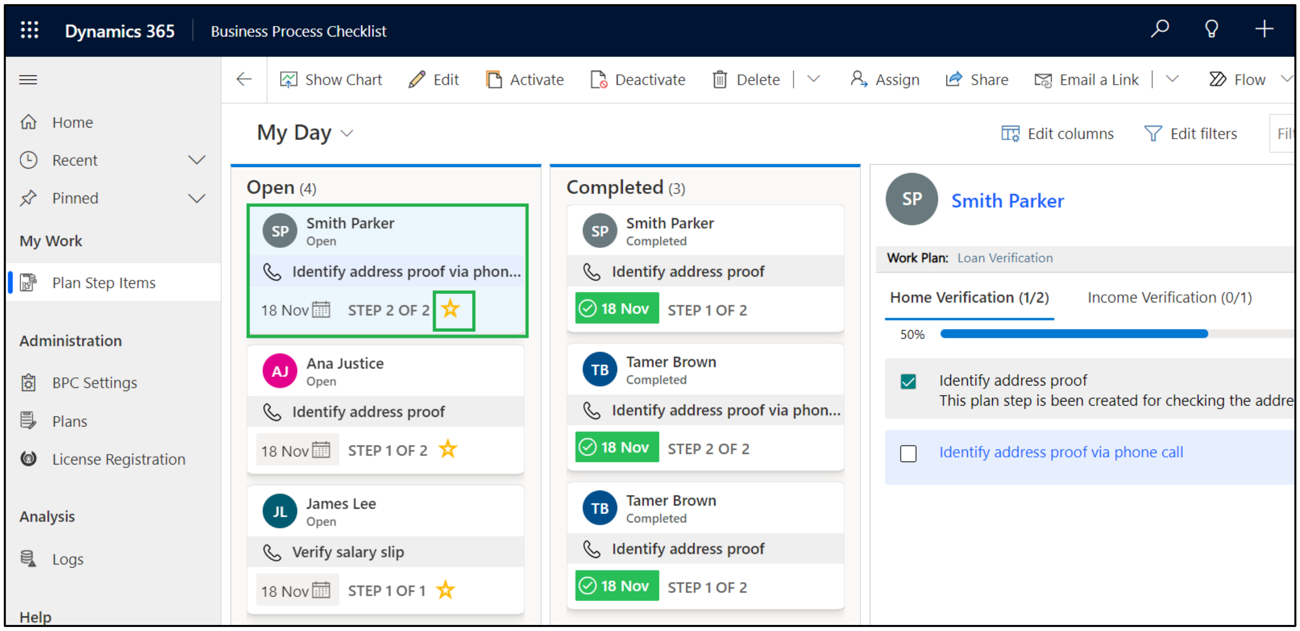
- Users can be able to skip the **plan step** instead of performing it.



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

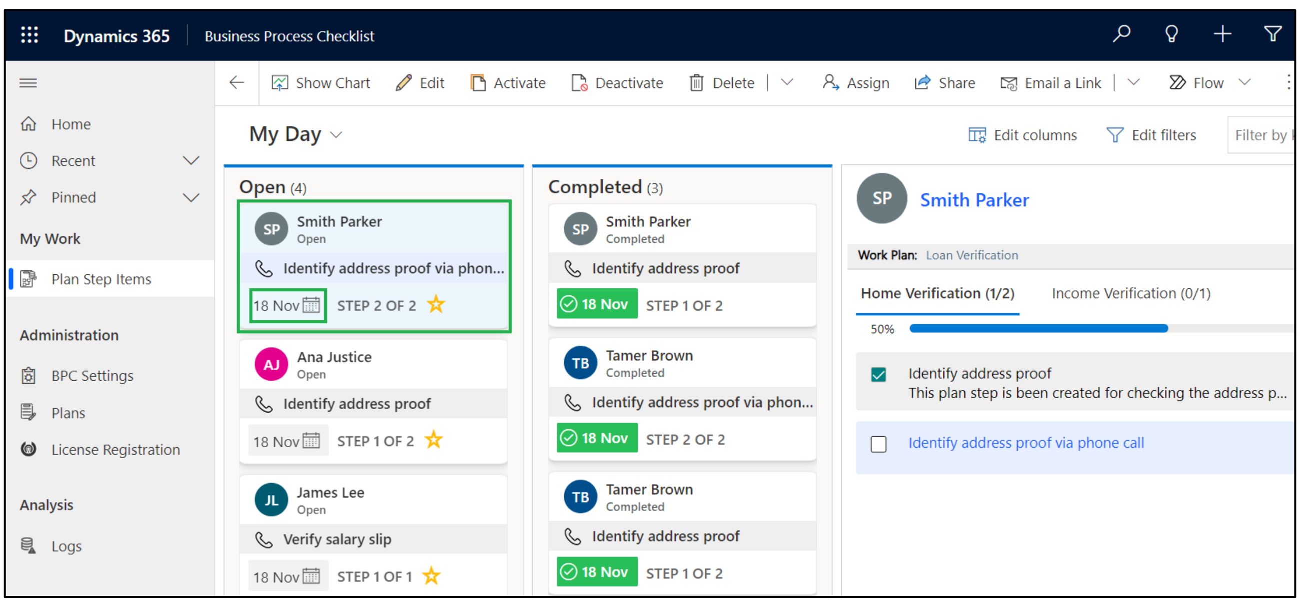


- Users can mark plan steps as favorites by clicking on the icon shown below. Once marked as favorites, users can see them in the Important Items View.



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.

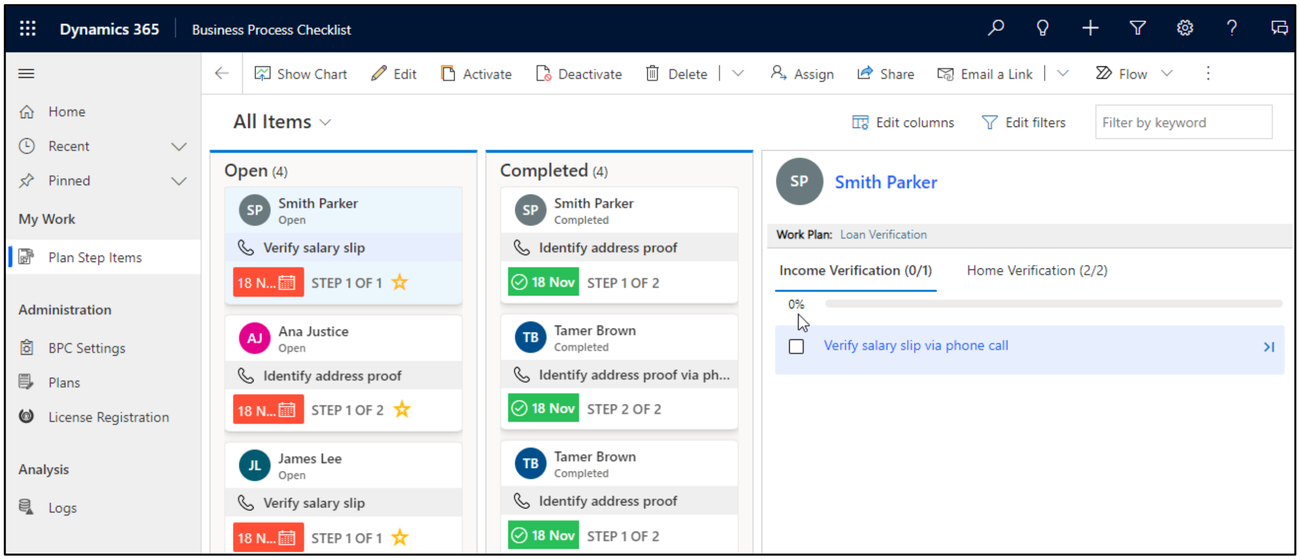


View Record Details

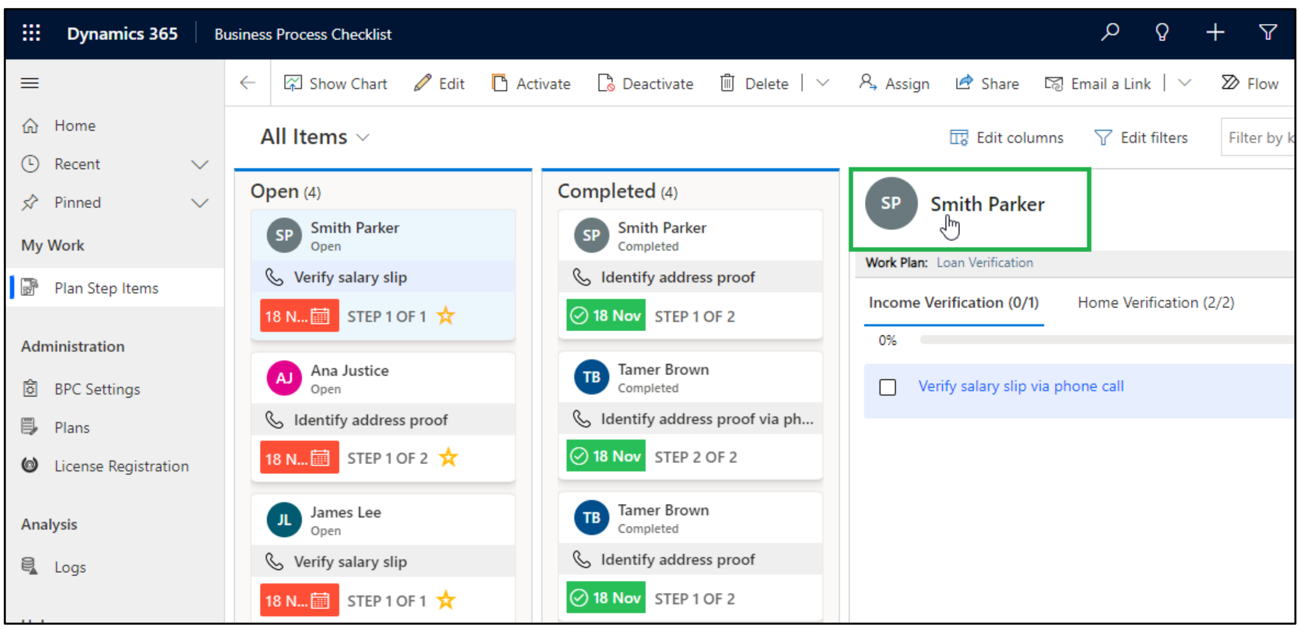
Users can view the record details that he needs to follow during the course of the day without moving to the original app (Example Sales Hub).

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

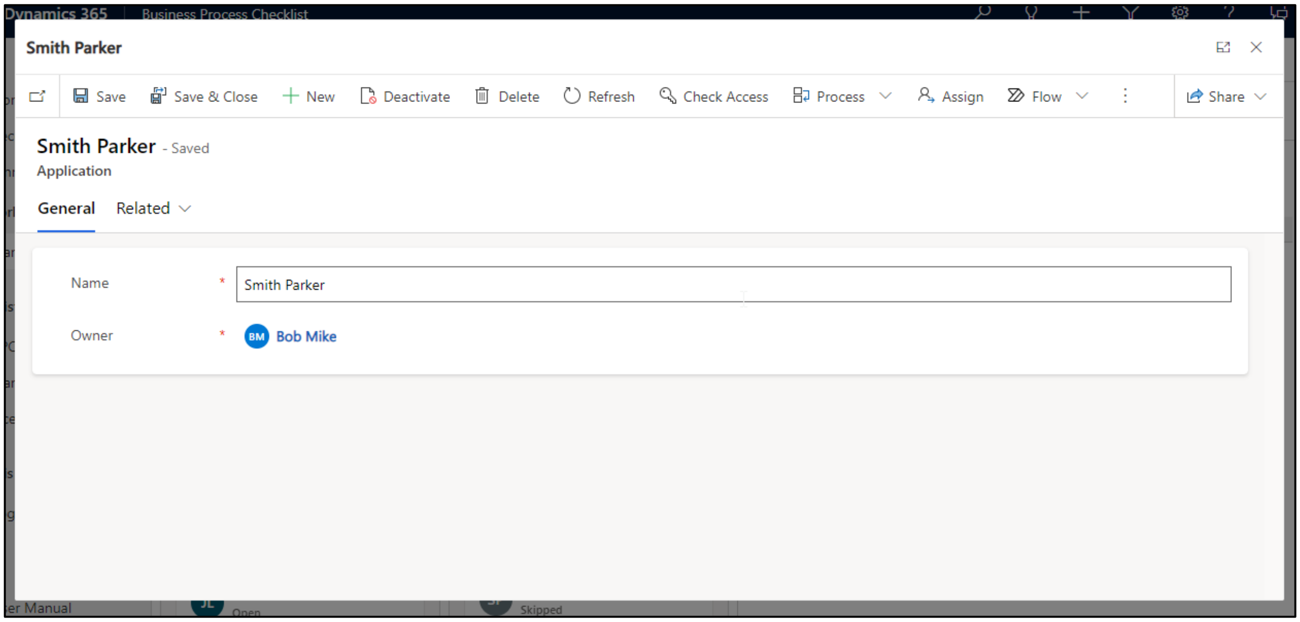
- Go to **Plan Step Item.**



- Click on **Regarding.**



- Record Details will now get displayed.

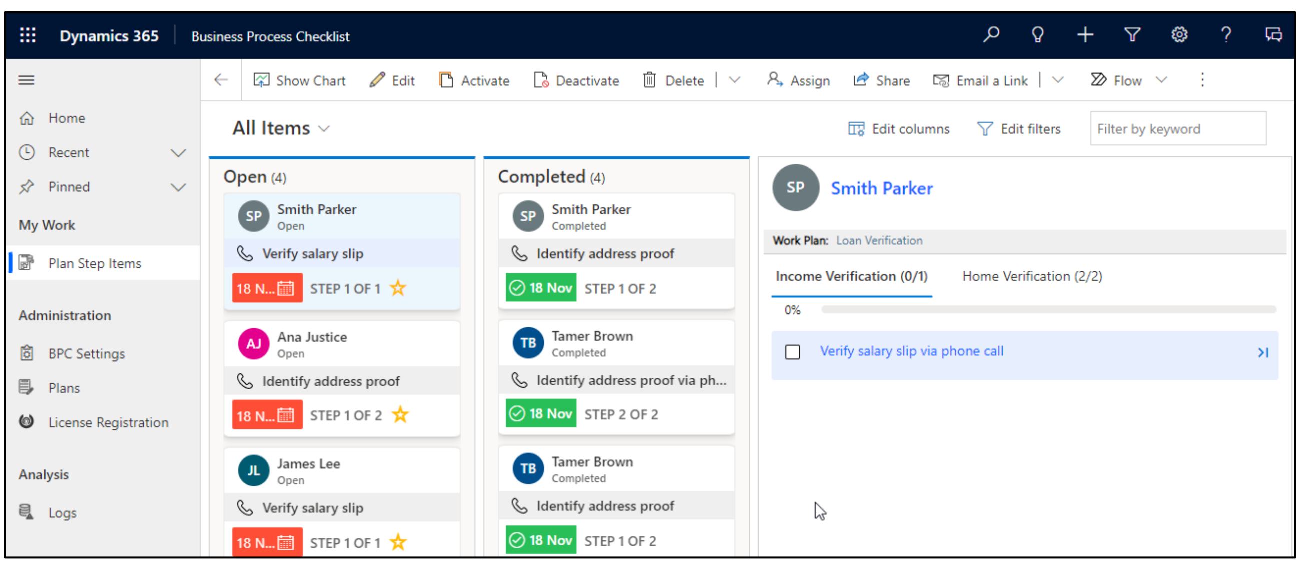


View Plan Details

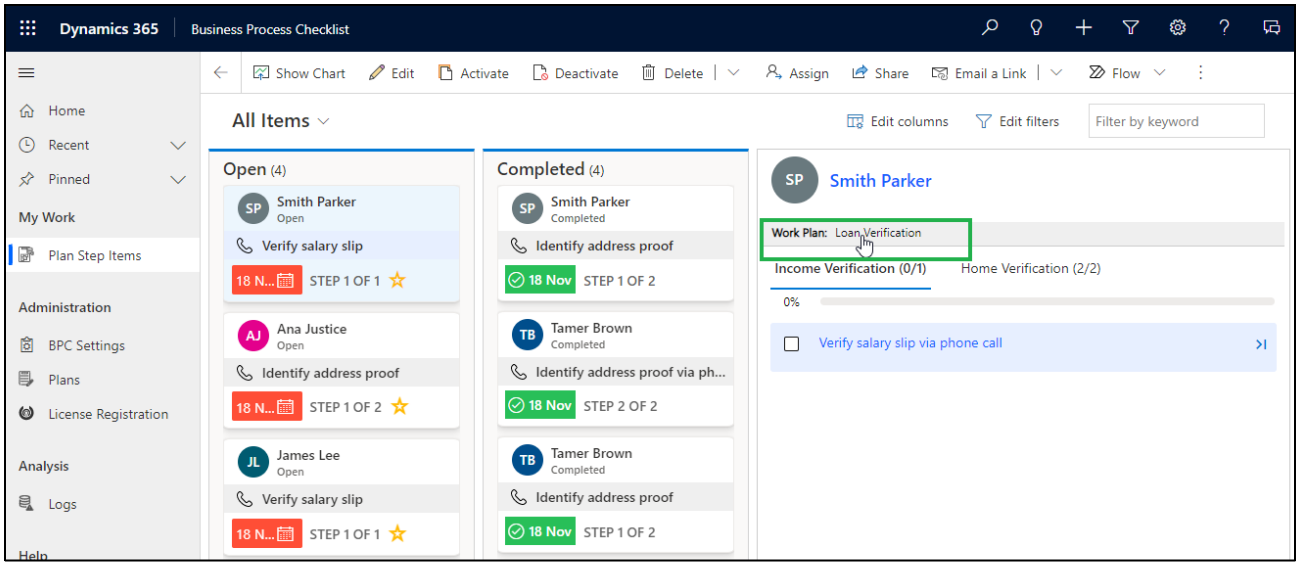
Users can view the details of plan created by the manager that he needs to follow during the course of the day.

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

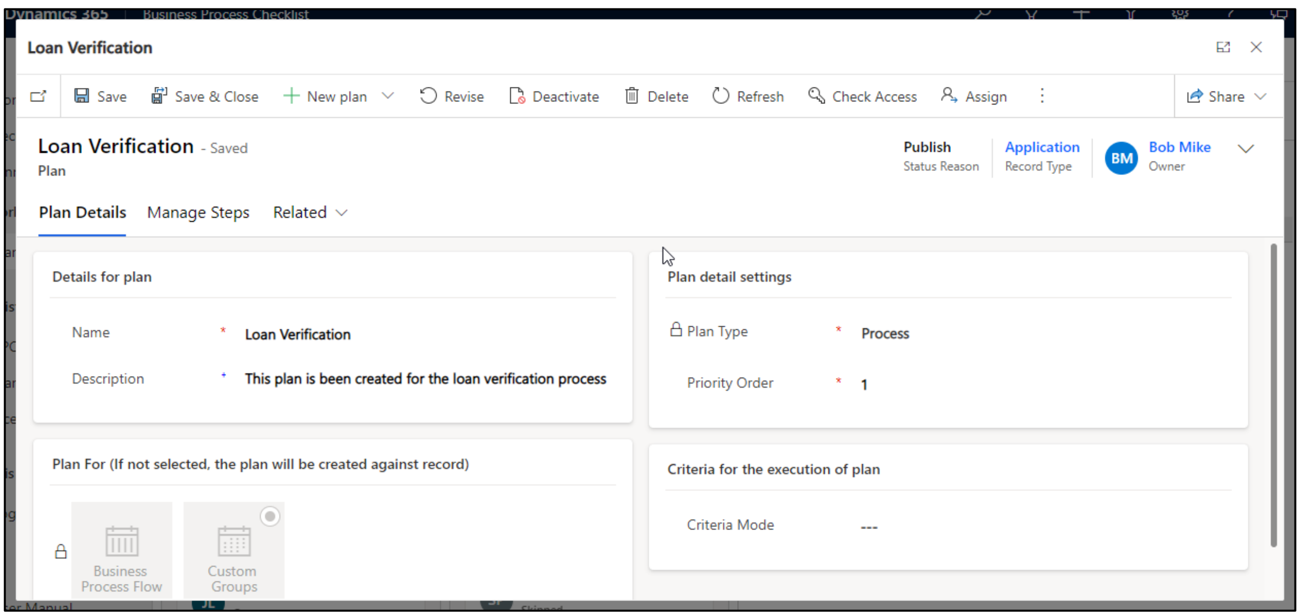
- Go to **Plan Step Items.**



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



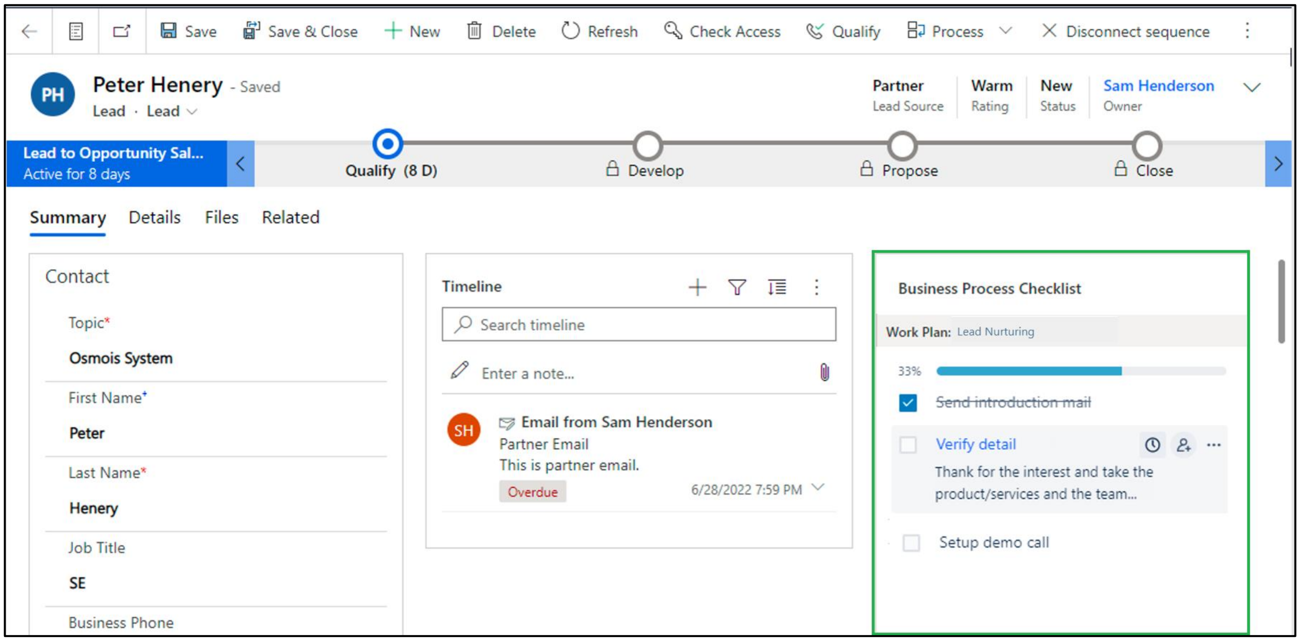
- Plan Detail will now get displayed.



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.



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:

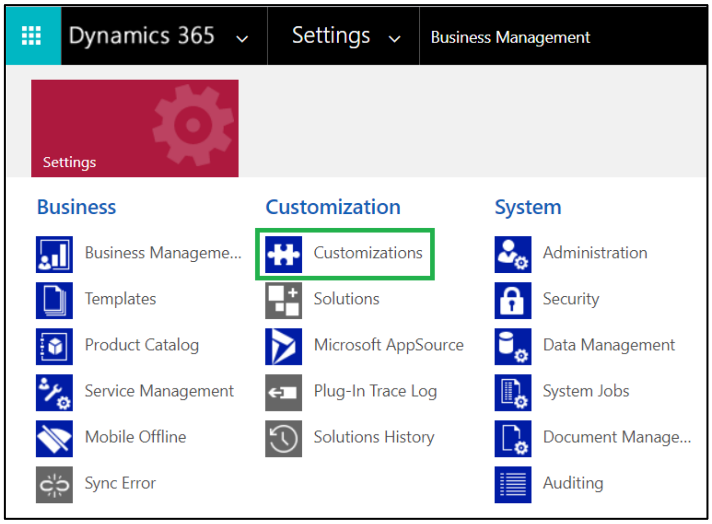
- Export configuration from one environment
- Import the same configuration into another environment

Export configurations from one environment to another:

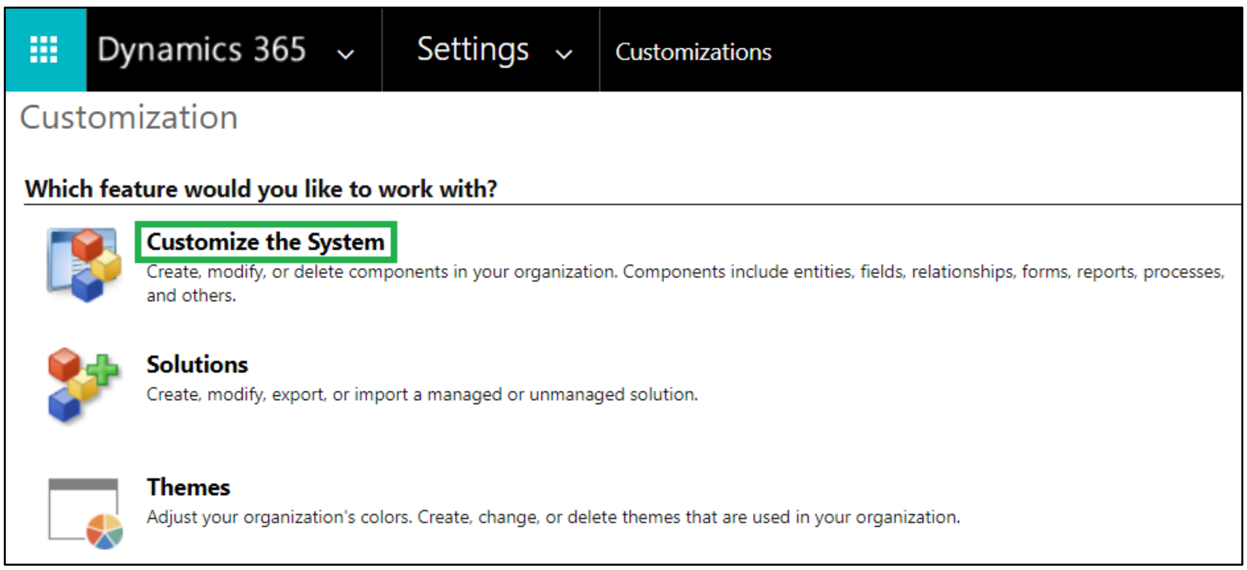
To export configurations from one environment to another follow the steps given below:

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:

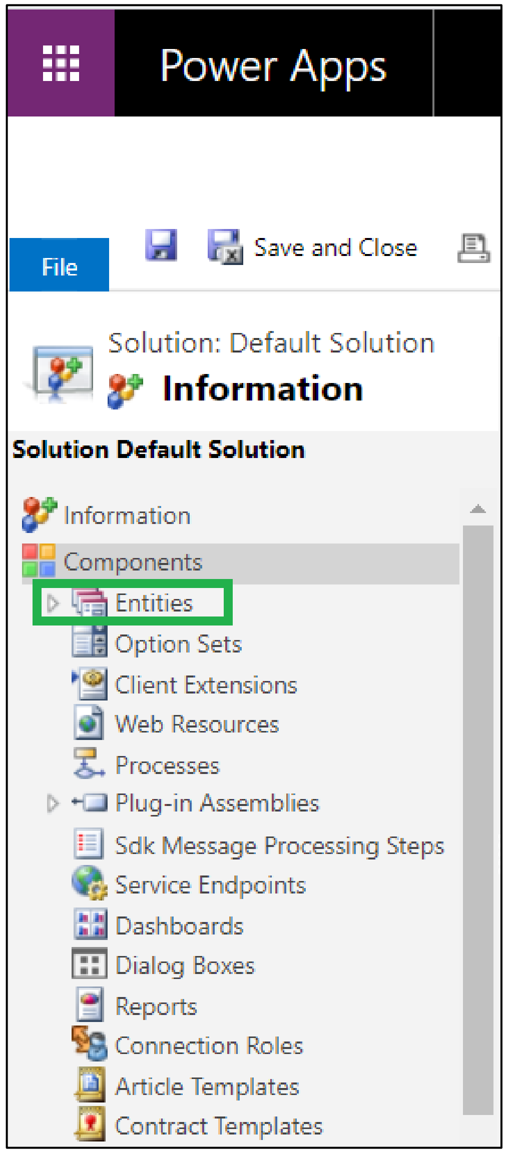
- Navigate to **Settings** --> **Customizations.**

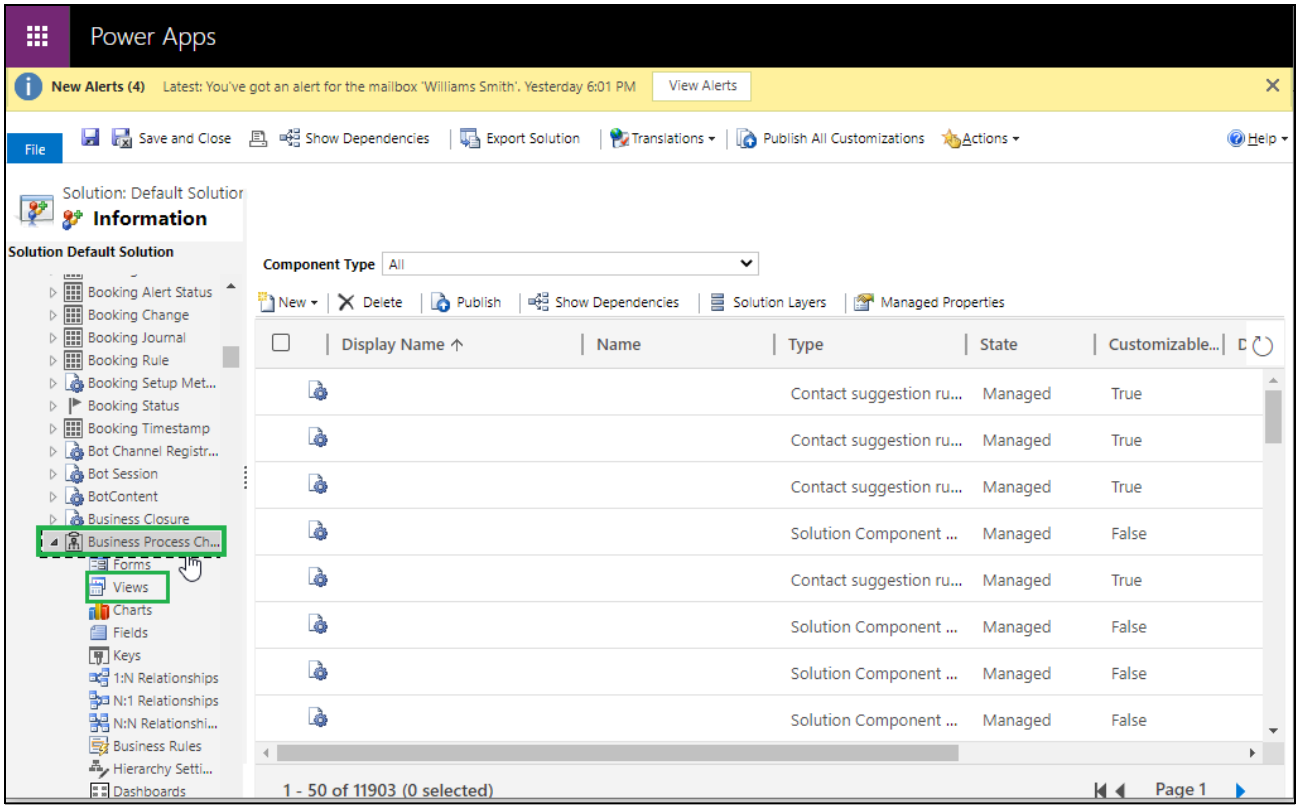


- Click on **'Customize the System'.**

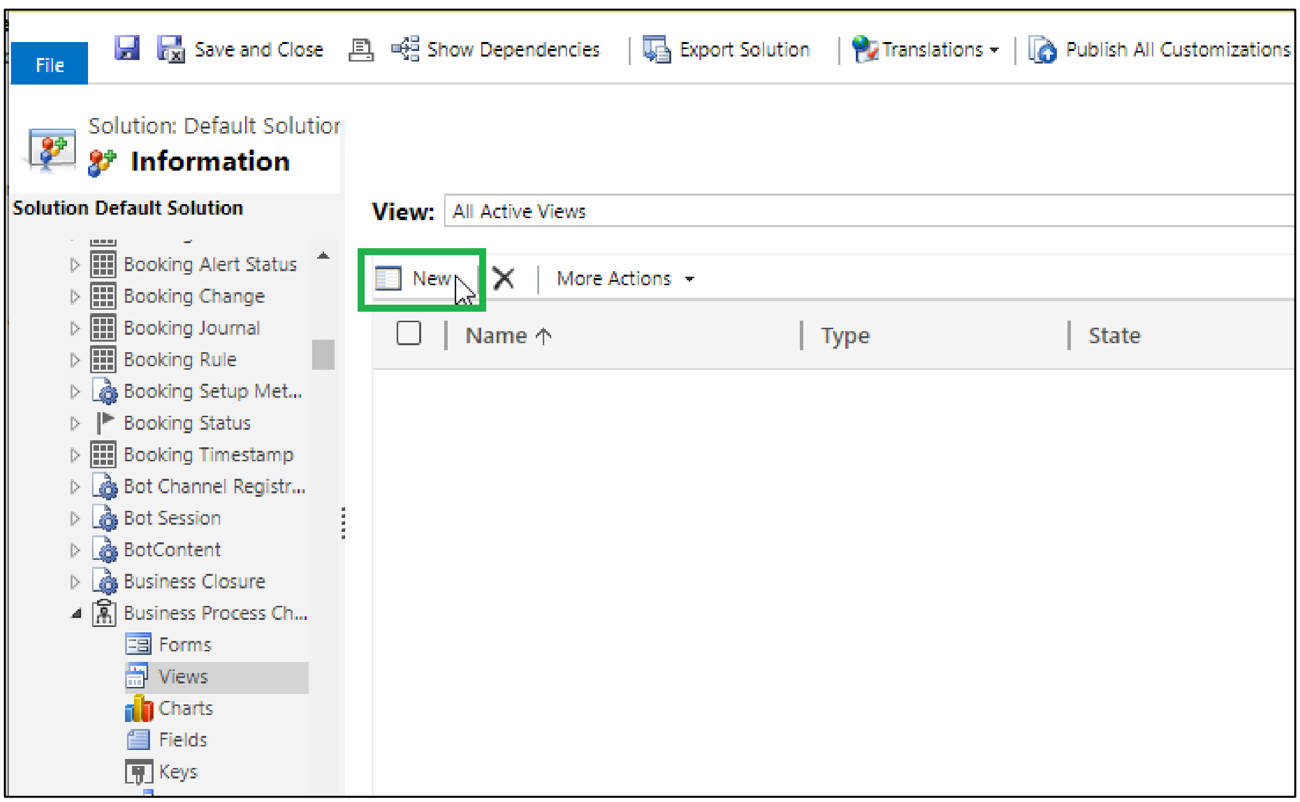


- Navigate to **Entities** --> **Business Process Checklist** --> **Views**.

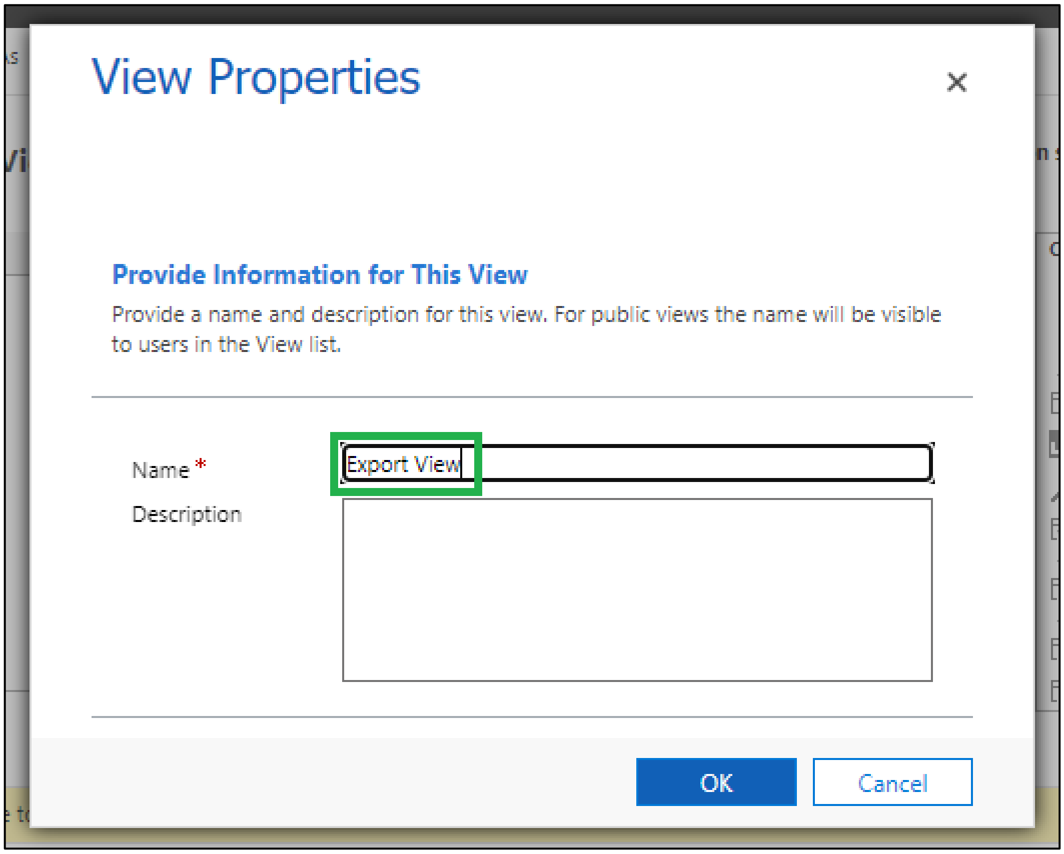

Power Apps
File
Save and Close
Solution: Default Solution
Information
Solution Default Solution
Information
Components
Entities
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing Steps
Service Endpoints
Dashboards
Dialog Boxes
Reports
Connection Roles
Article Templates
Contract Templates



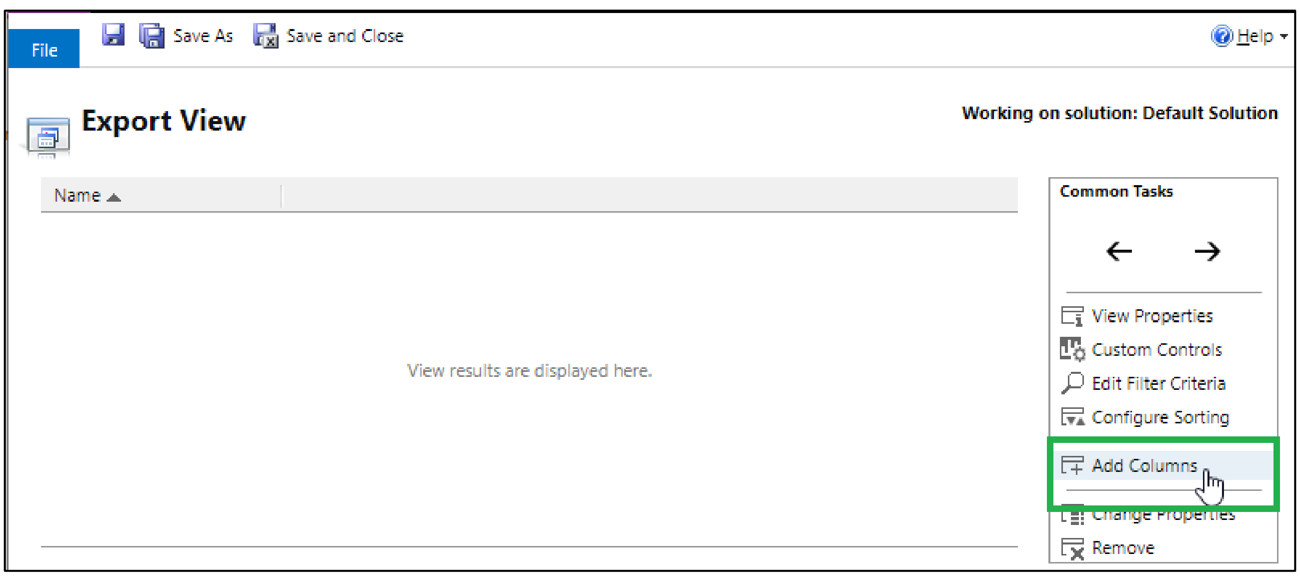
- Click on **'New'** to create a new view.



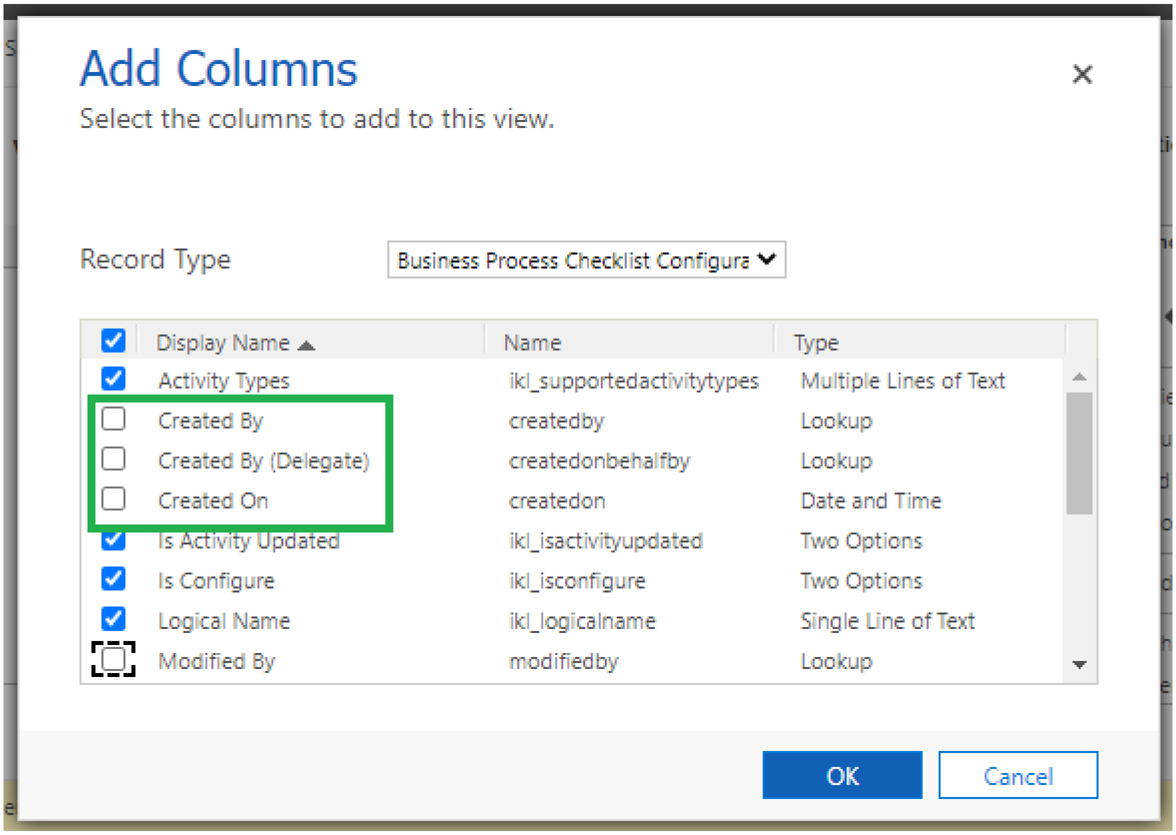
- Enter an appropriate name for the view and click **'Ok'** to proceed.

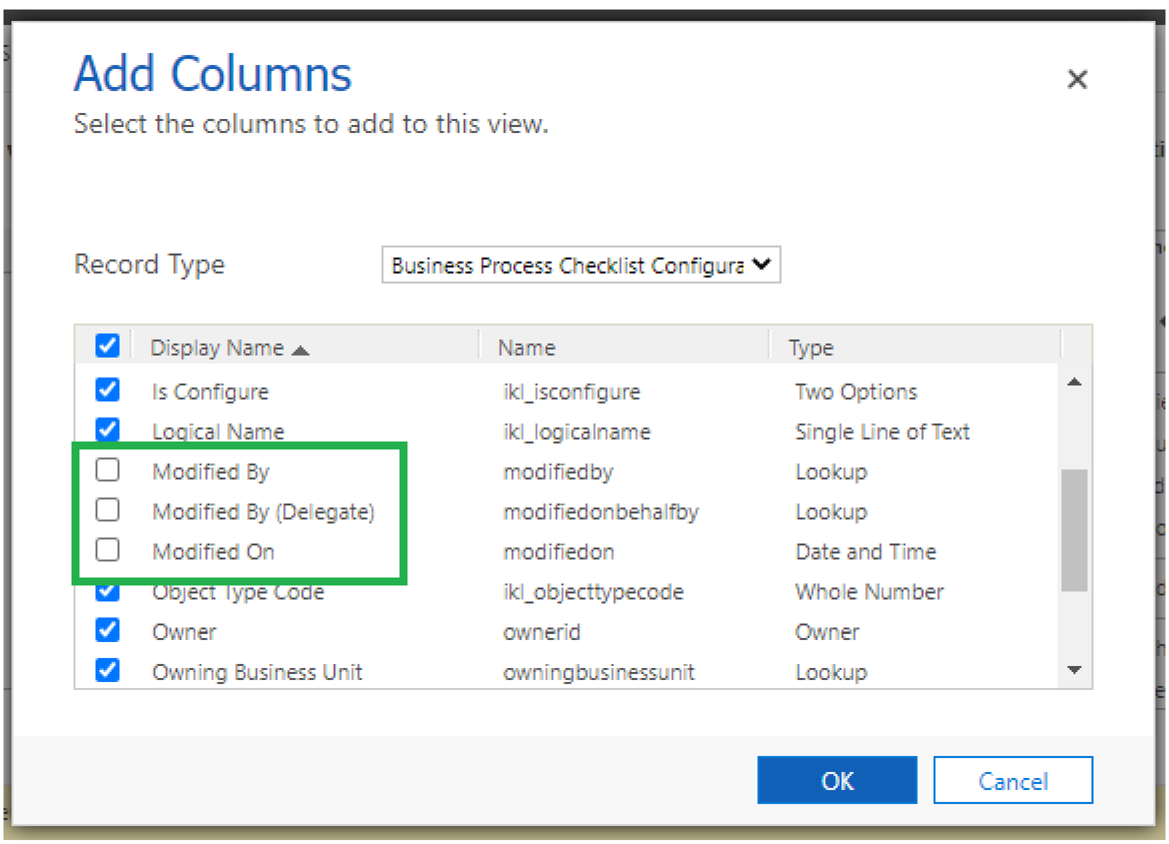


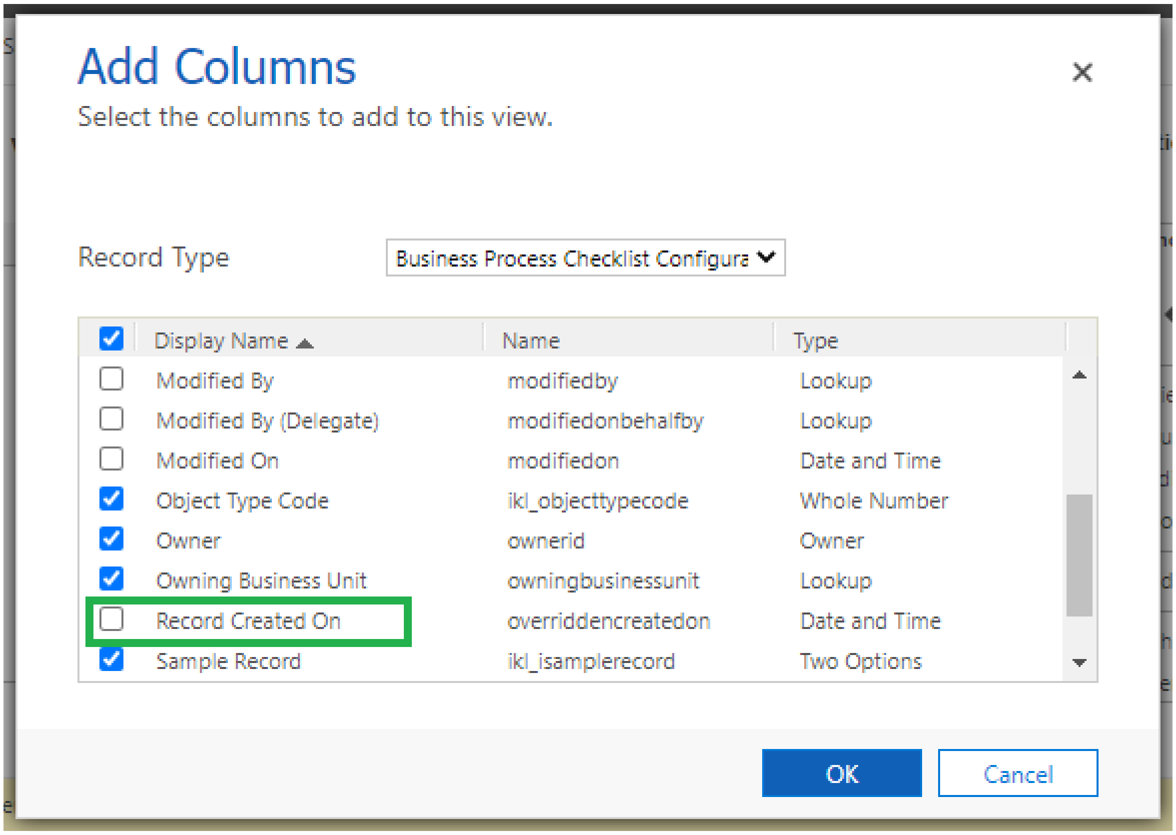
- Click on **'Add Columns'.**



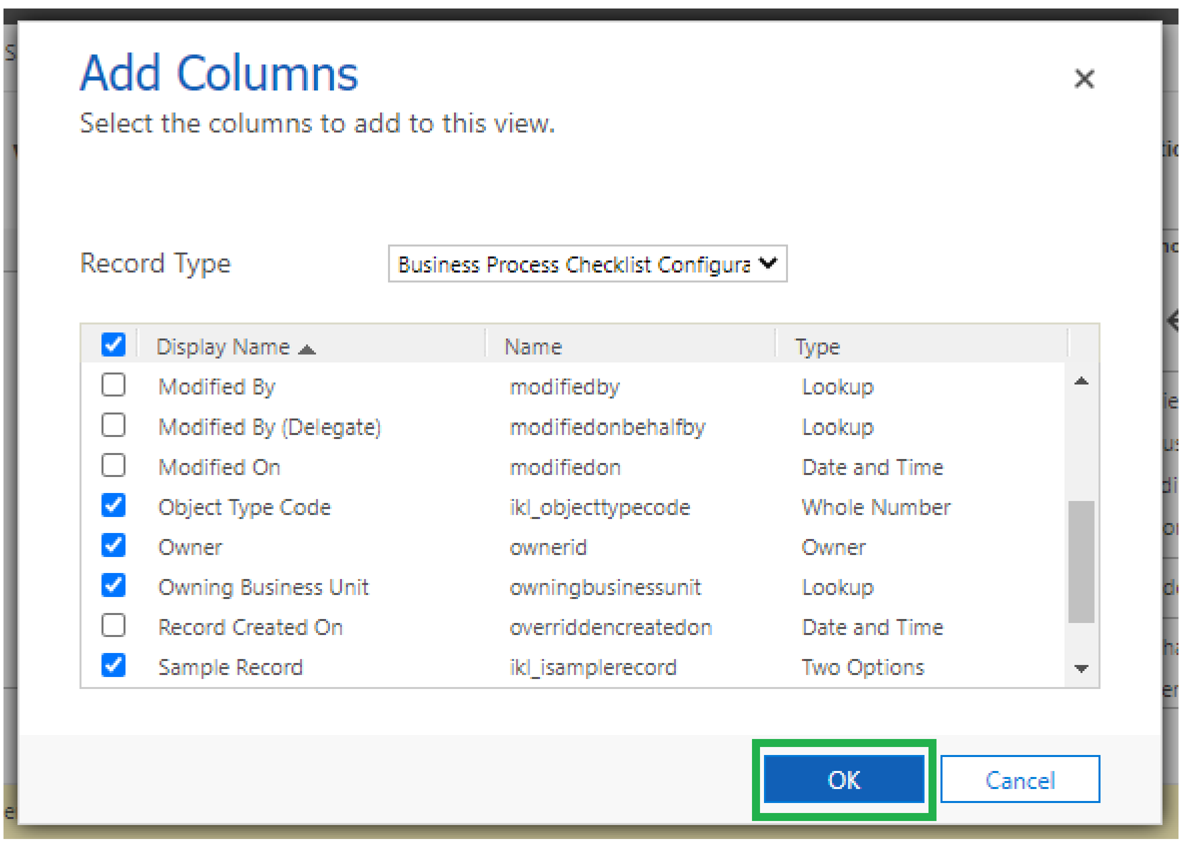
- You can keep the following column names disabled - **Created by, Created by (Delegate), Created on, Modified by, Modified by (Delegate), Modified on and Record created on.**


Add Columns
Select the columns to add to this view.
Record Type
Business Process Checklist Configura
Display Name
Name
Type
Activity Types
ikl_supportedactivitytypes
Multiple Lines of Text
Created By
createdby
Lookup
Created By (Delegate)
createdonbehalfby
Lookup
Created On
createdon
Date and Time
Is Activity Updated
ikl_isactivityupdated
Two Options
Is Configure
ikl_isconfigure
Two Options
Logical Name
ikl_logicalname
Single Line of Text
Modified By
modifiedby
Lookup
OK
Cancel

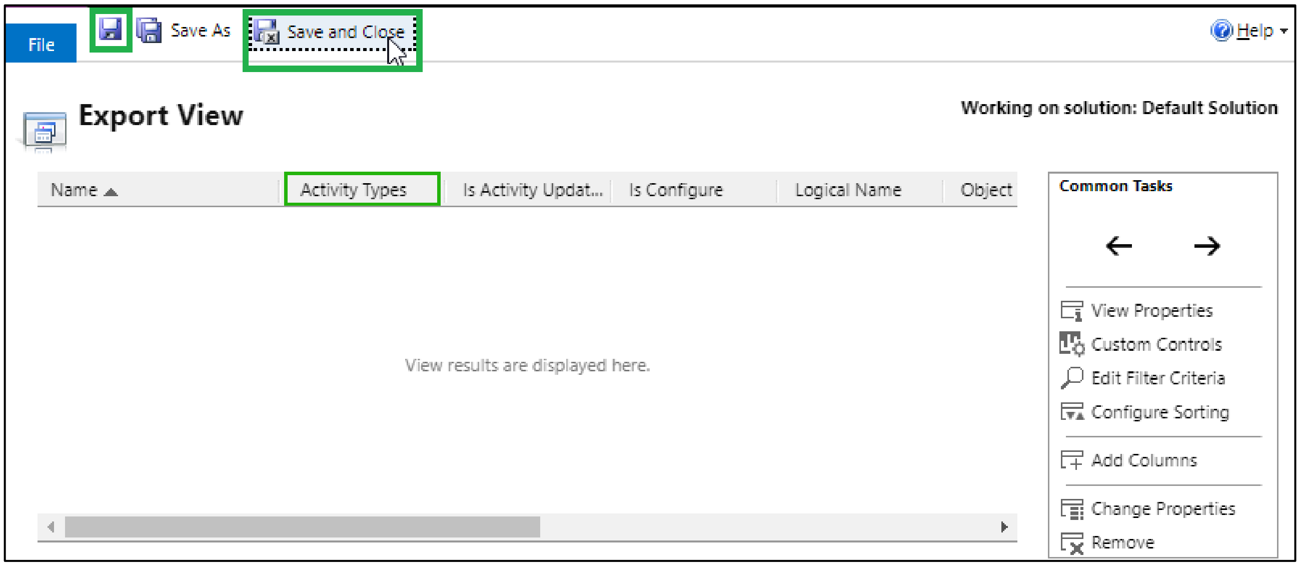

Add Columns
Select the columns to add to this view.
Record Type
Business Process Checklist Configura
Display Name
Name
Type
Is Configure
ikl_isconfigure
Two Options
Logical Name
ikl_logicalname
Single Line of Text
Modified By
modifiedby
Lookup
Modified By (Delegate)
modifiedonbehalfby
Lookup
Modified On
modifiedon
Date and Time
Object Type Code
ikl_objecttypecode
Whole Number
Owner
ownerid
Owner
Owning Business Unit
owningbusinessunit
Lookup
OK
Cancel



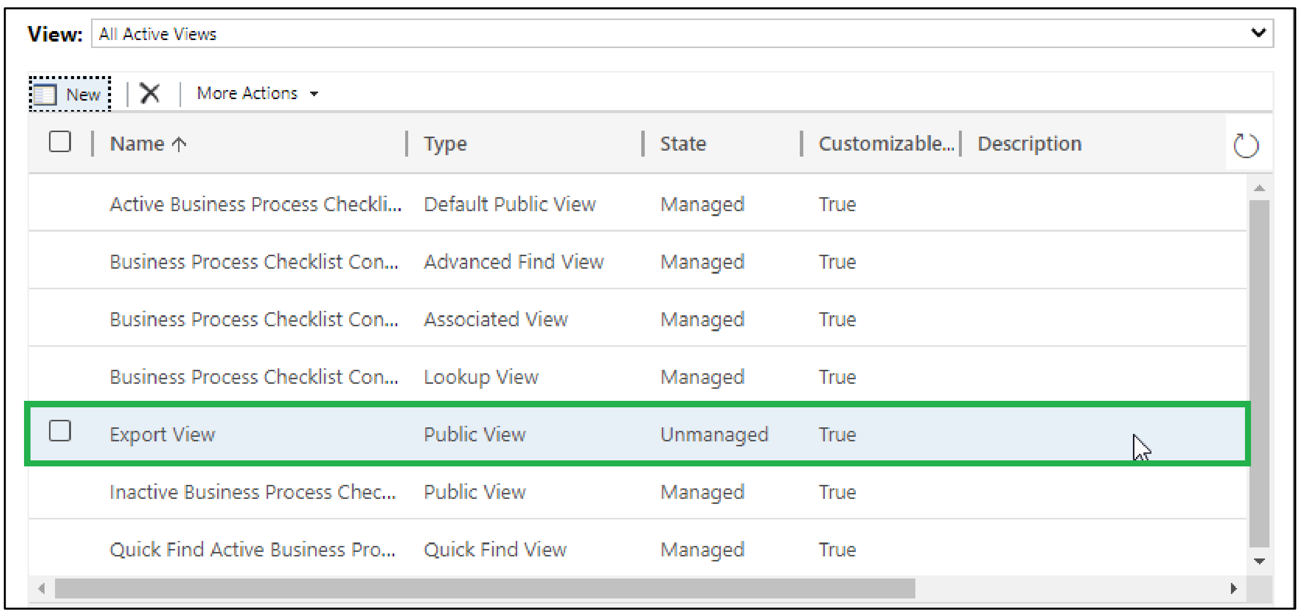
- Click **'Ok'** to proceed.



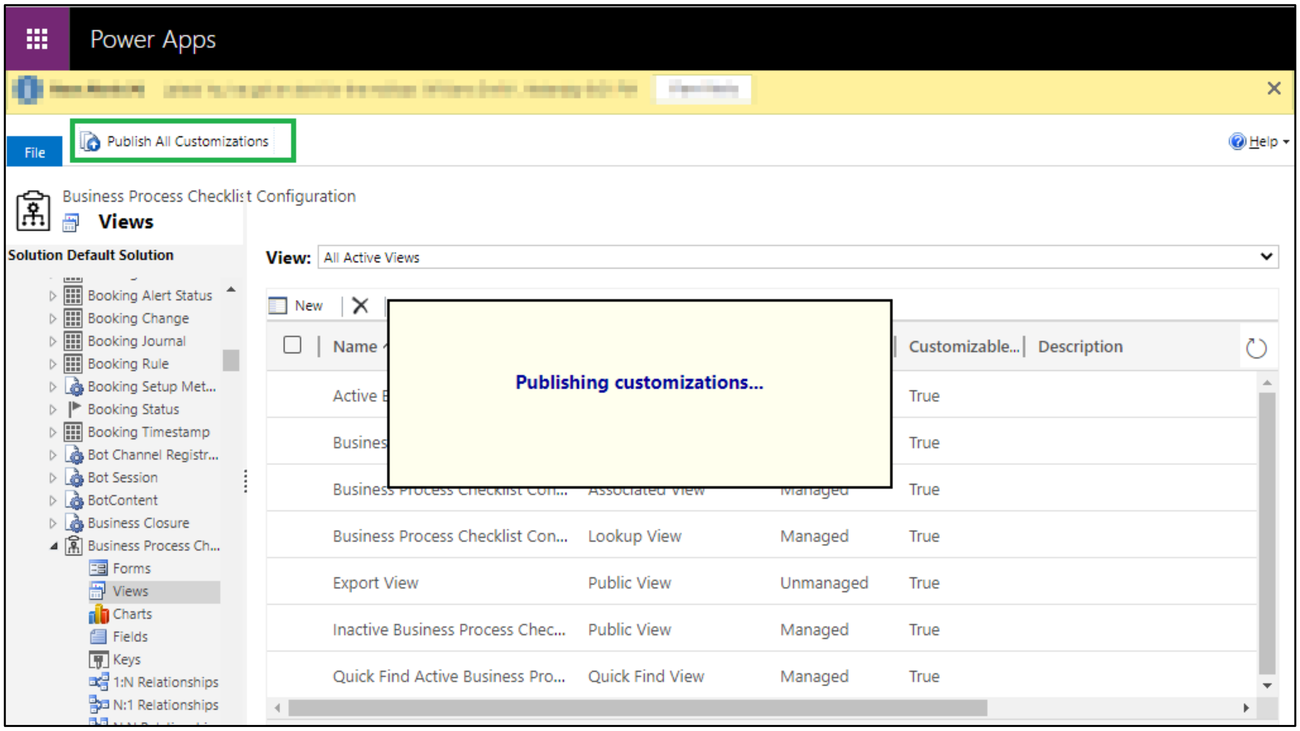
- Click **'Save/Save & Close'** icon to save this view.



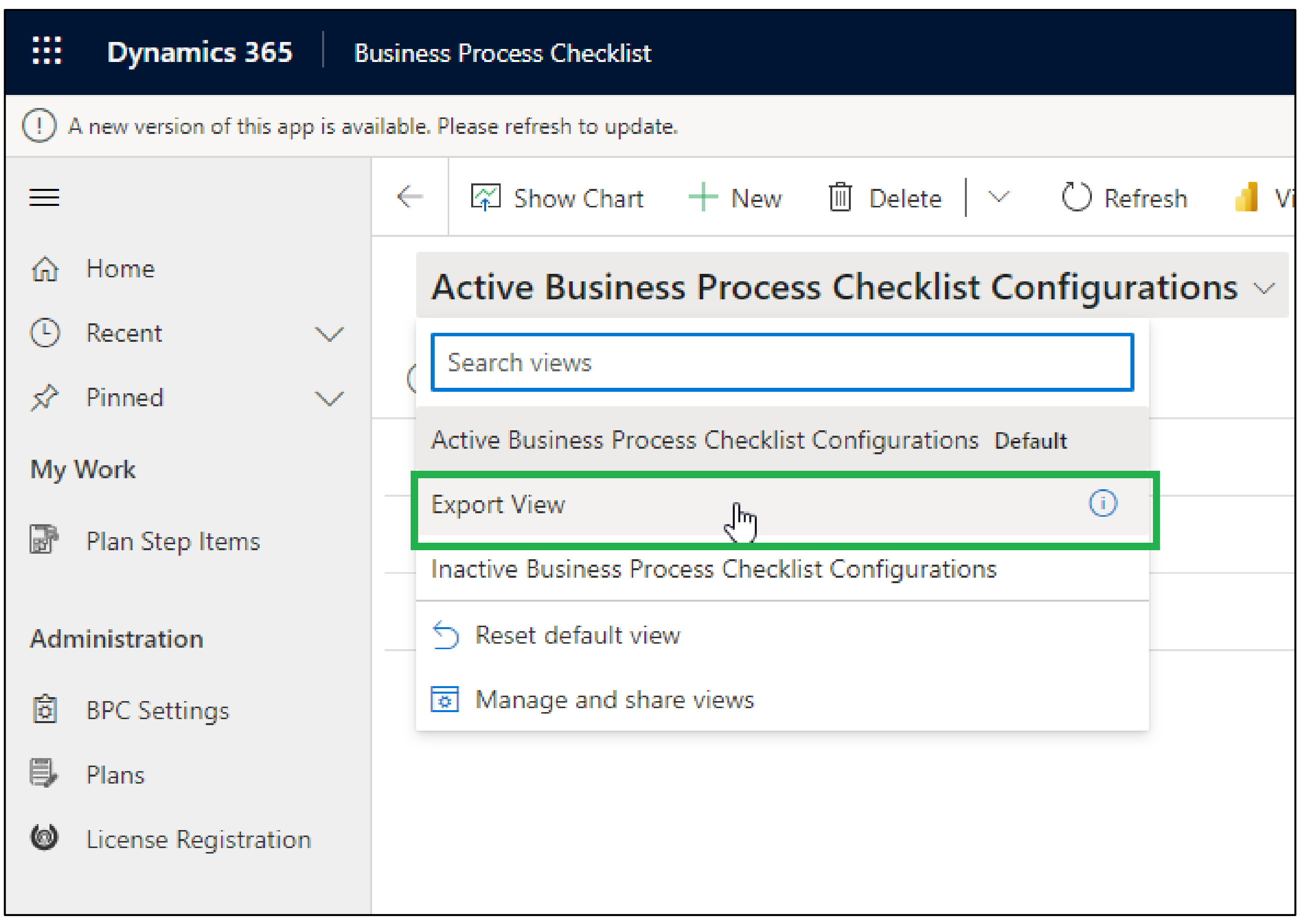
- You can see the view that has just been added.



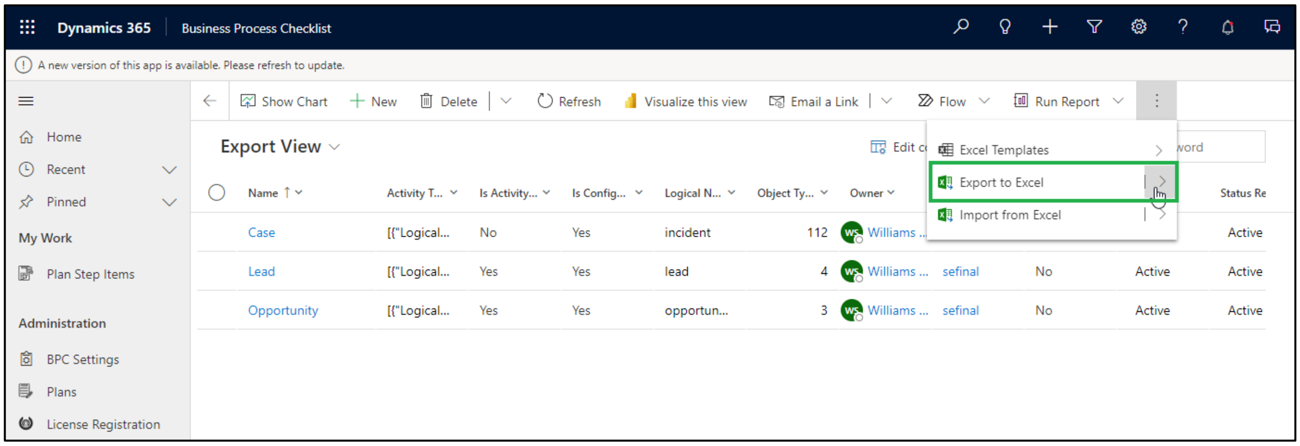
- Click on **'Publish All Customizations'.**

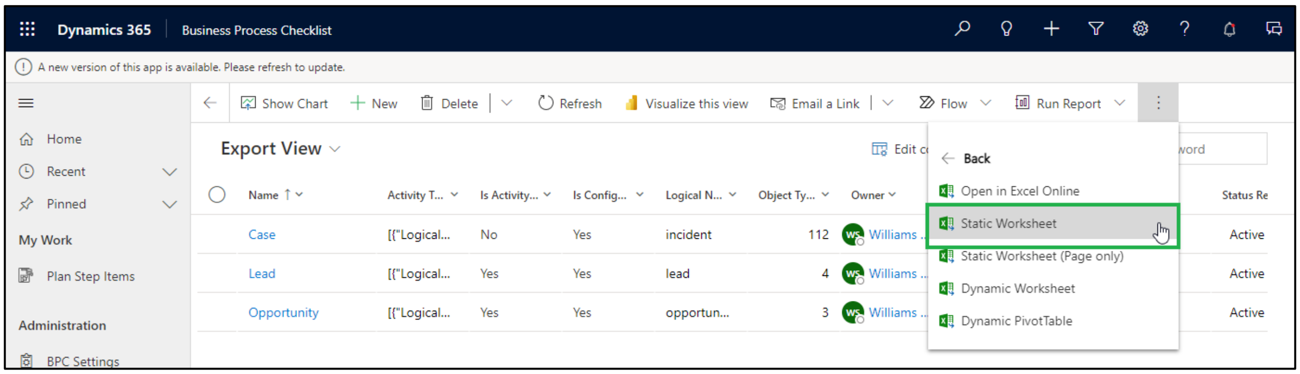


- Go back to **Business Process Checklist** application --> Business Process Checklist **Configurations** --> Select the **Export View.**



- Click on **'Export to Excel'.**



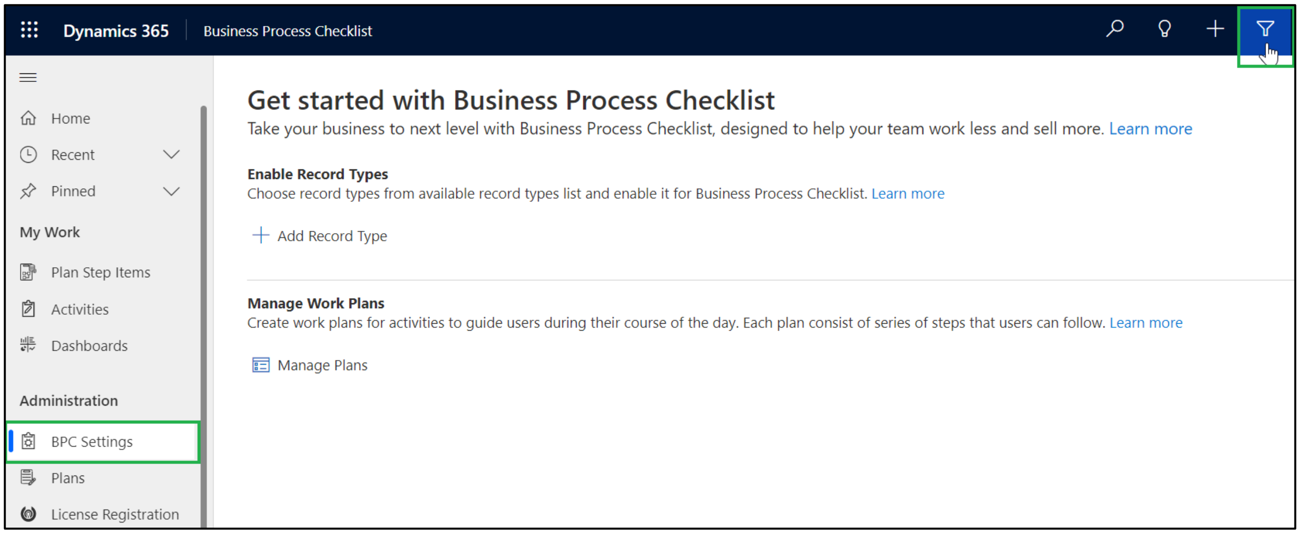


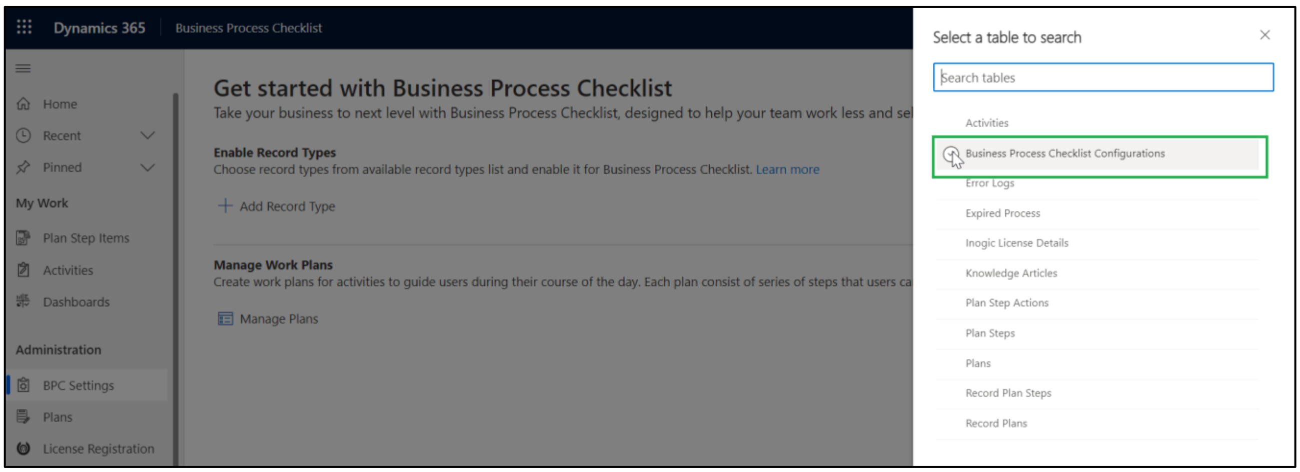
- After clicking on **'Export to Excel'**, file with an extension **'.xlsx'** will be downloaded. **Open** this file and **save** it as **.csv format** in the system.
- Click **'Ok'.**
- Once you have successfully created the .csv version of the exported file, let's proceed to import operation.

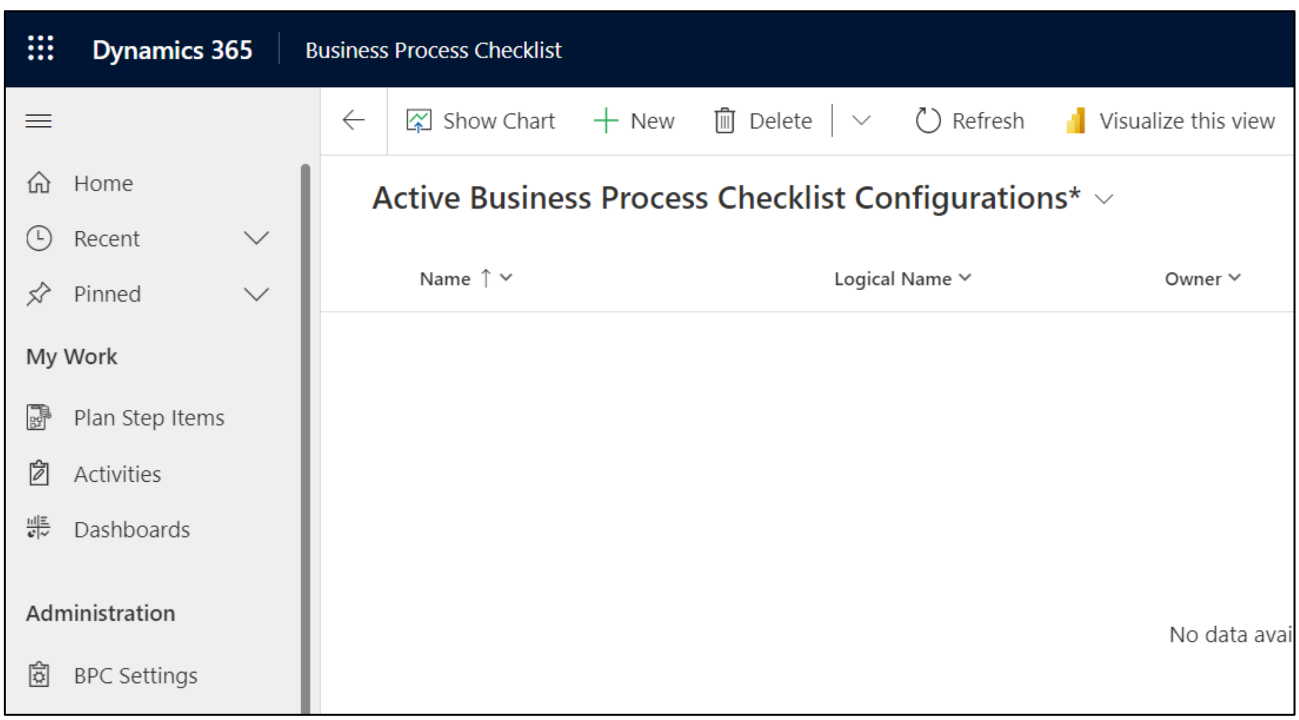
Import the same configuration in another environment:

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

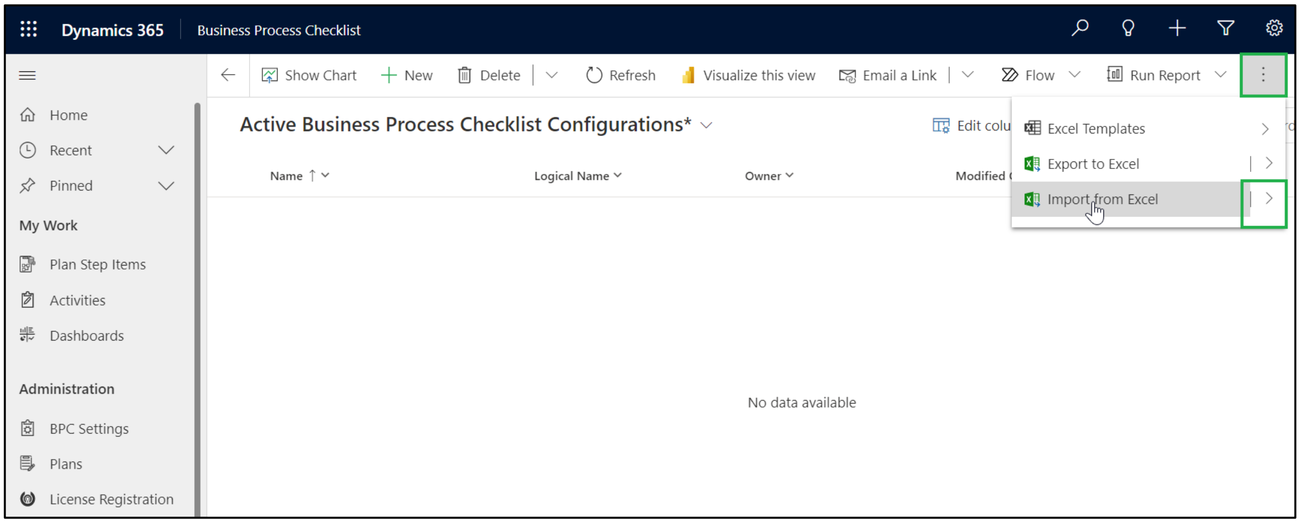
- Login to the other environment to which we want to import the template --> Navigate to **Business Process Checklist** application **--> BPC Settings** --> **Business Process Checklist Configurations.**

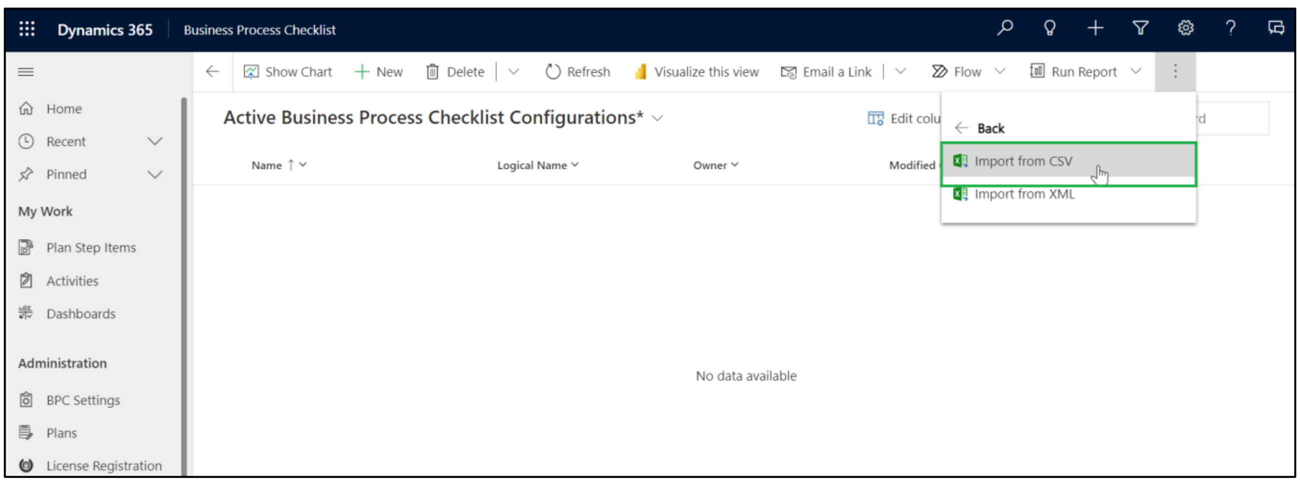

Dynamics 365
Business Process Checklist
Home
Recent
Pinned
My Work
Plan Step Items
Activities
Dashboards
Administration
BPC Settings
Plans
License Registration
Get started with Business Process Checklist
Take your business to next level with Business Process Checklist, designed to help your team work less and sell more. Learn more
Enable Record Types
Choose record types from available record types list and enable it for Business Process Checklist. Learn more
Add Record Type
Manage Work Plans
Create work plans for activities to guide users during their course of the day. Each plan consist of series of steps that users can follow. Learn more
Manage Plans


Select a table to search
Search tables
Activities
Business Process Checklist Configurations
Error Logs
Expired Process
Inogic License Details
Knowledge Articles
Plan Step Actions
Plan Steps
Plans
Record Plan Steps
Record Plans

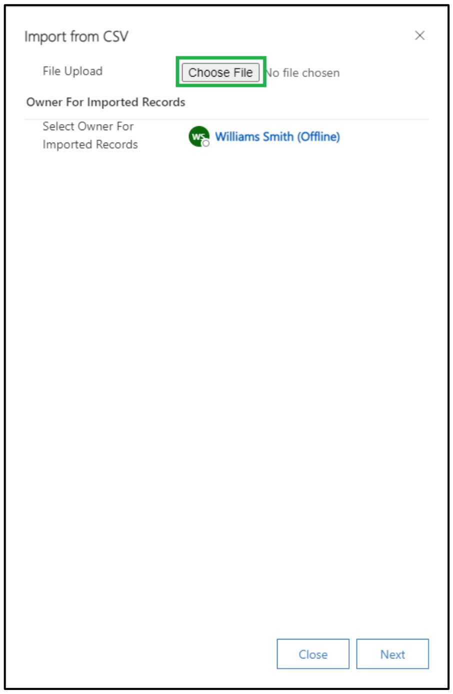

Dynamics 365
Business Process Checklist
Show Chart
New
Delete
Refresh
Visualize this view
Active Business Process Checklist Configurations*
Name
Logical Name
Owner
Home
Recent
Pinned
My Work
Plan Step Items
Activities
Dashboards
Administration
BPC Settings

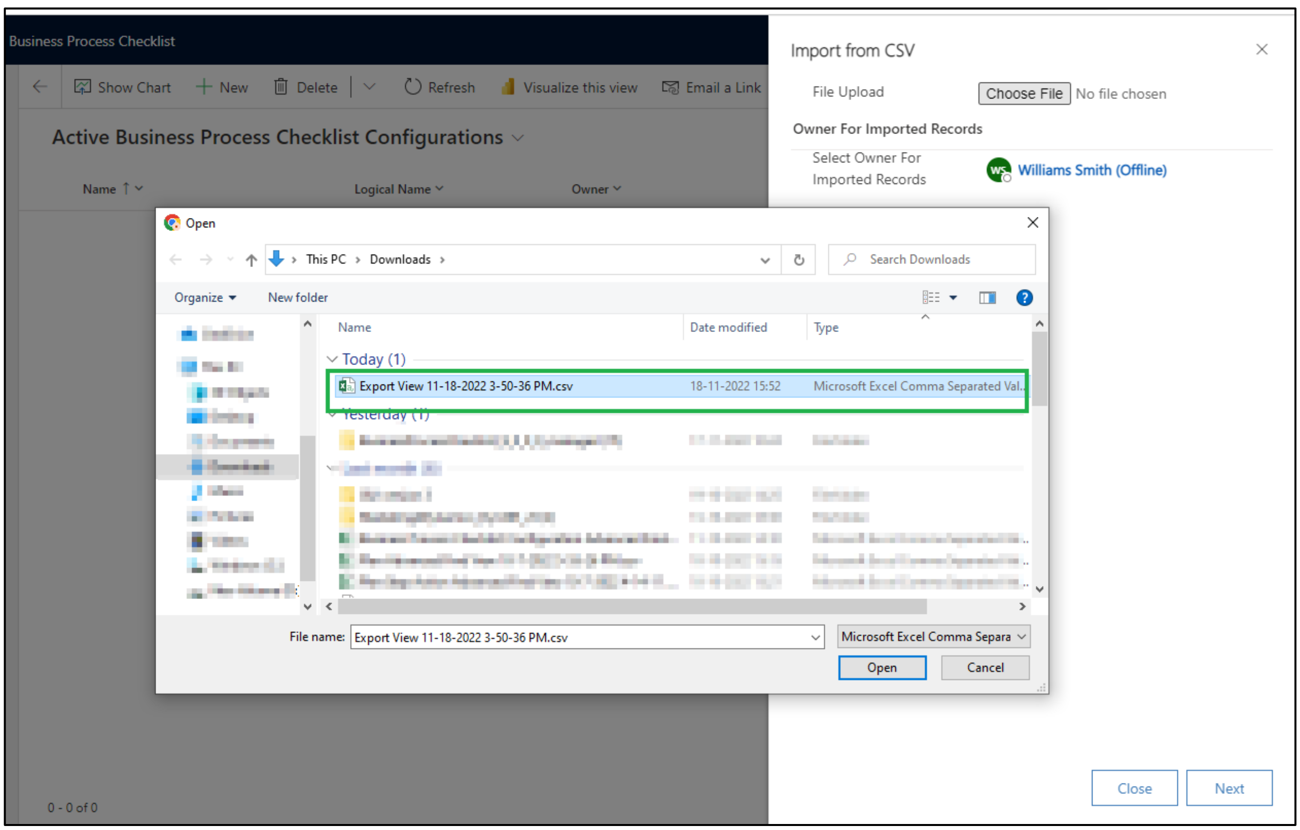
- **Import** the same **.csv** file.



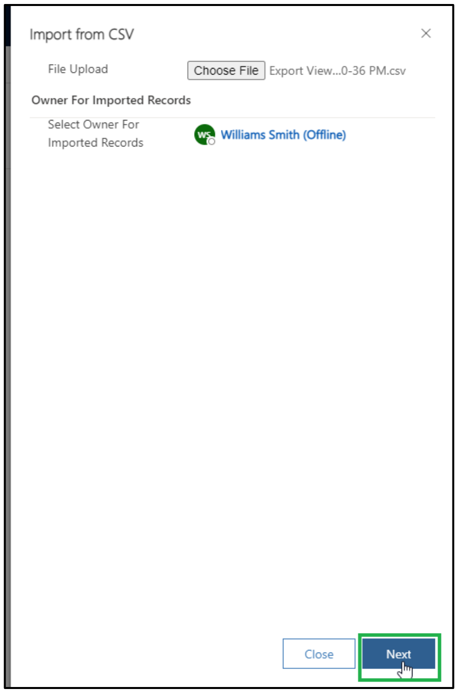


- Click on **Chose File** and Browse the **.csv** file.

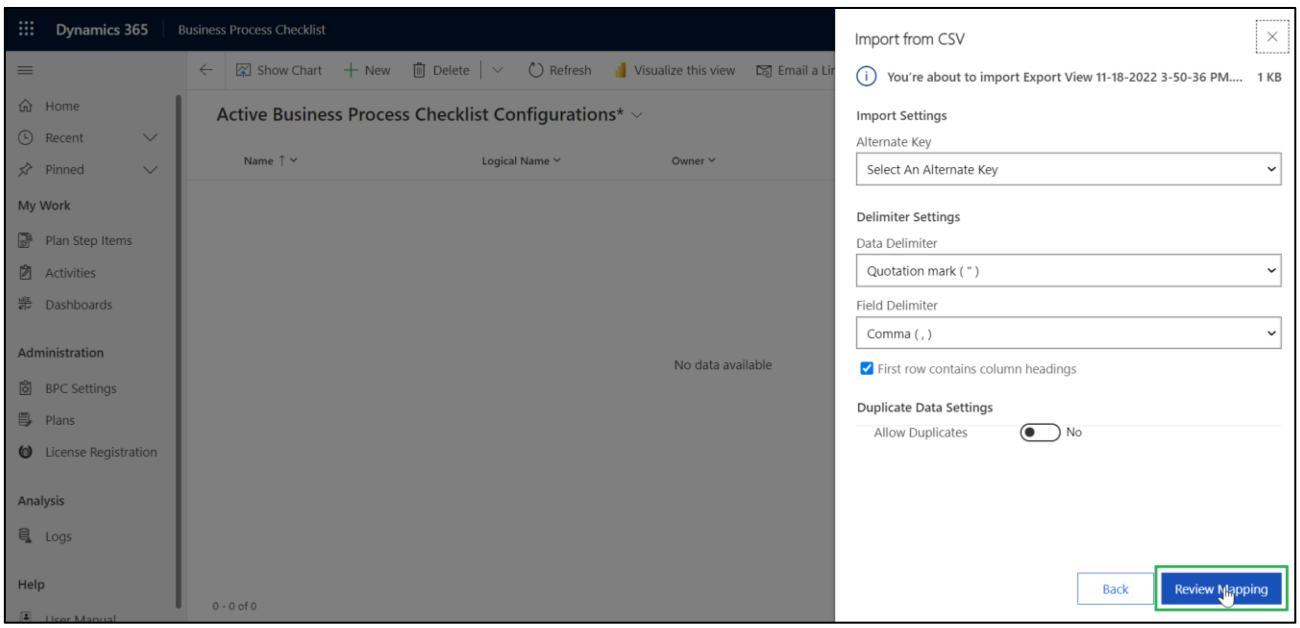




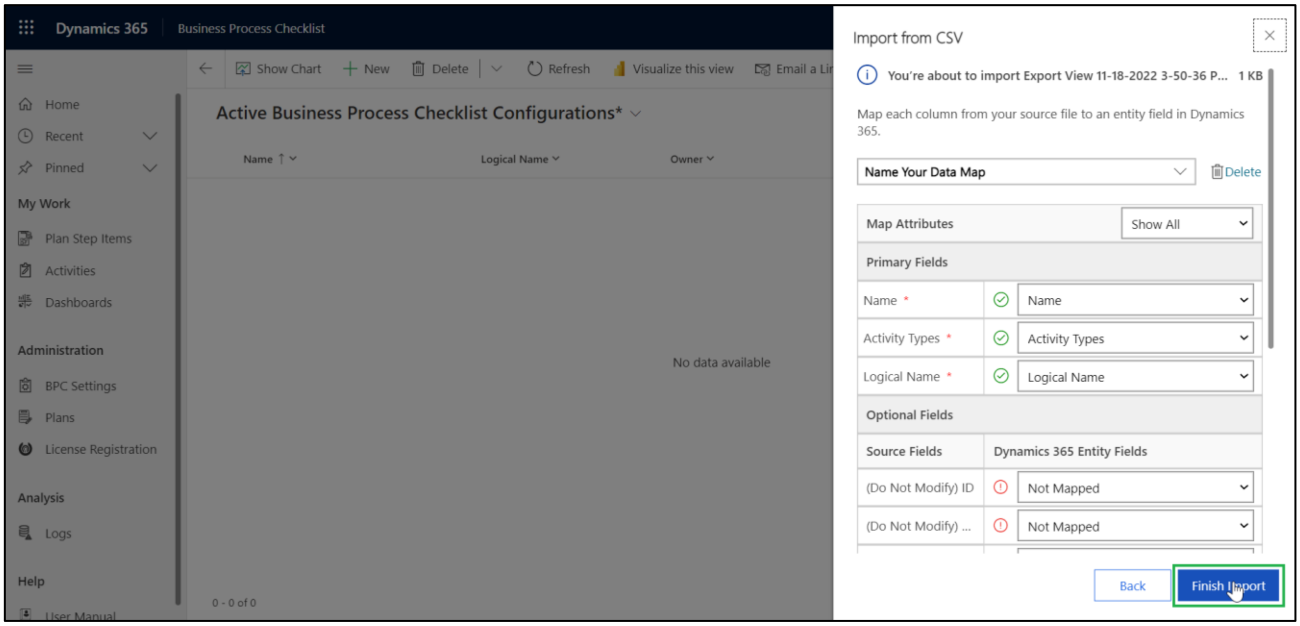
- Click on **NEXT.**



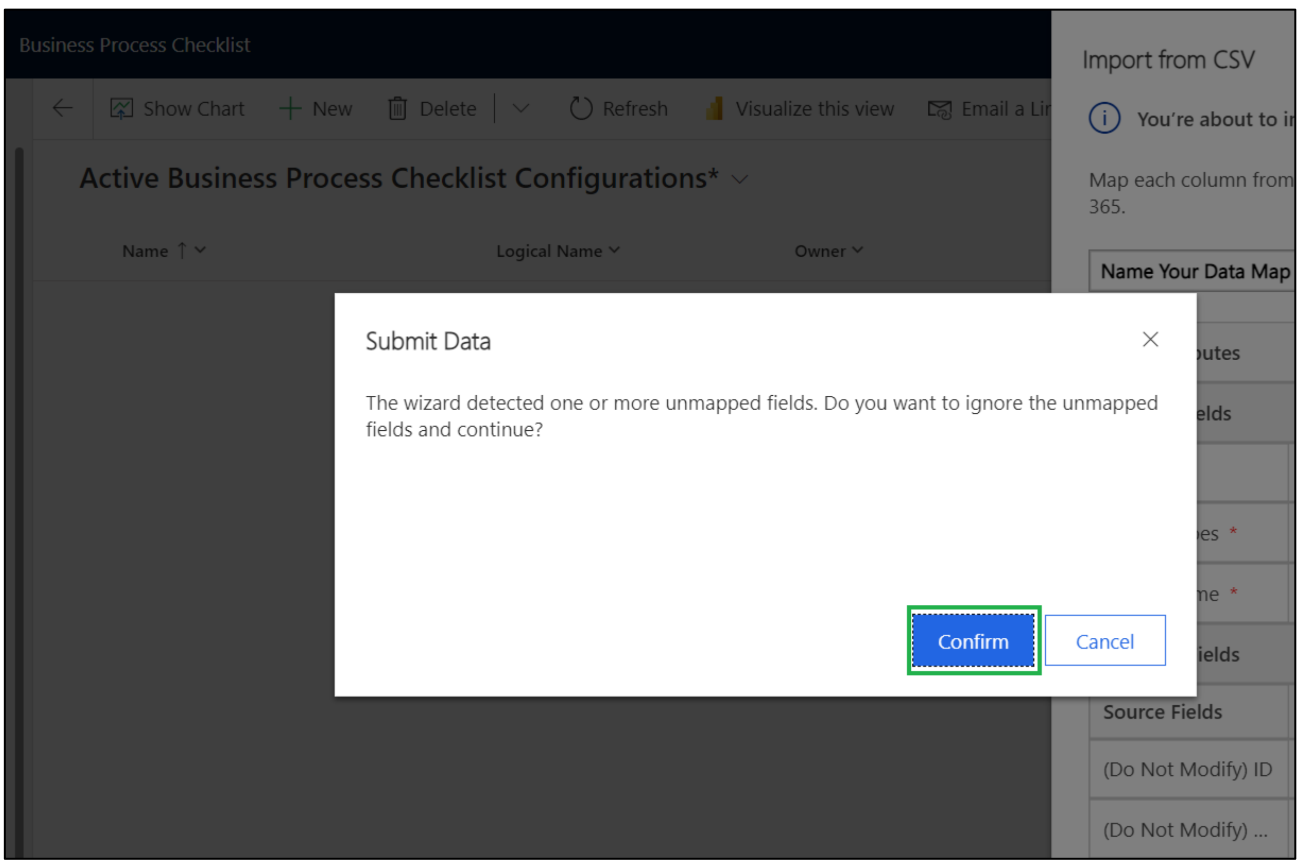
- Click on **Review Mapping**.



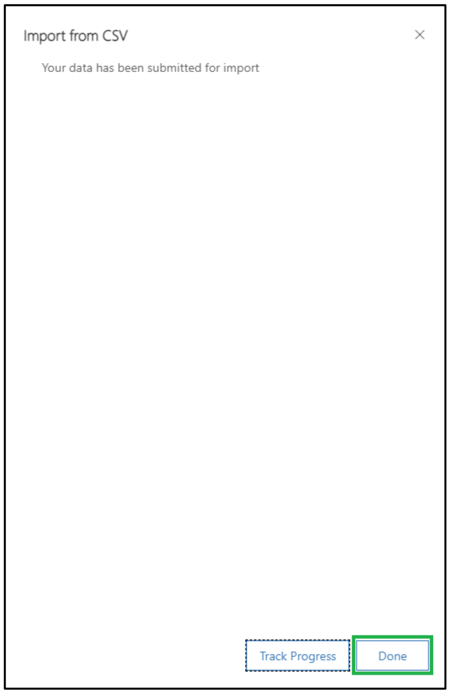
- Click **'Finish Import'** without changing any of the below fields.



- Click on **Confirm.**



- Click on **Done.**



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

Contact Us

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TTC Industrial Area, MIDC, Turbhe

Navi Mumbai, Maharashtra 400705

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