



White Paper

Business Process Checklist - Whitepaper

Aim:

Business Process Checklist is a productivity app that assists users in streamlining internal processes by enforcing the best course of action for day-to-day business operations. When a sales manager or administrator creates a checklist, plan, or to-do list, it will automatically get connected to desired records or Business Process Flows when certain conditions are met. This will streamline the management of business processes.

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
- Users can see the progress of there
- Supports both OOB and custom entities
- Supports both OOB and custom Business Process Flows

Supported Versions

Versions: Microsoft Dynamics 365 9.1 & above, Dataverse.

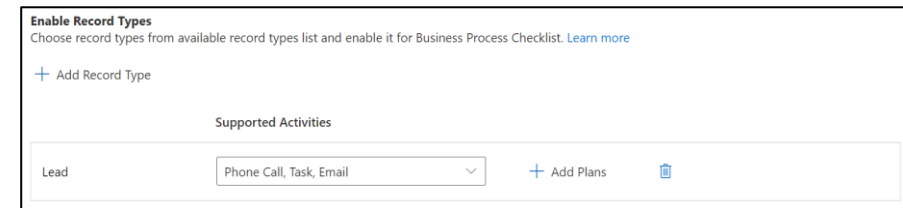
Deployment Models: Online.

Who needs it?

Business Process Checklist can assist companies in managing their business processes with best practices by implementing steps that are most effective. Once the manager creates the plan, users will have a predefined set of actions to perform that reflect the organization's best practices. Set a plan of action for

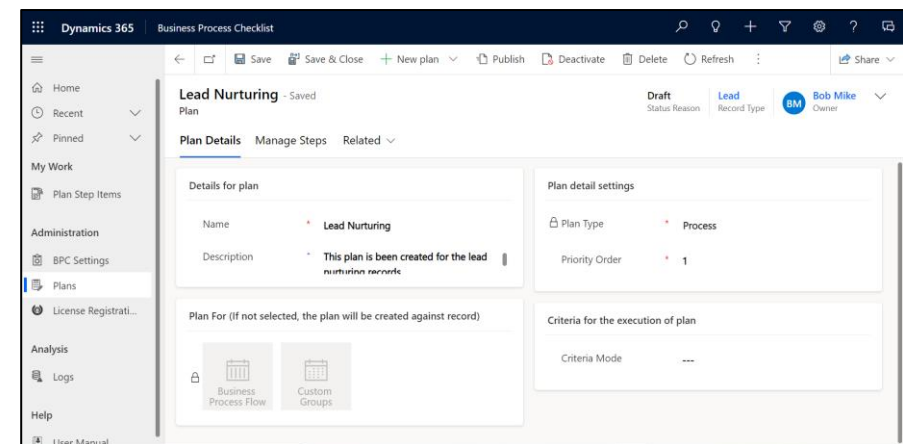
your sales representatives to follow, in the order you want them to follow it, using Business Process Checklist. Improve user productivity by better aligning your business processes in Dynamics 365 CRM.

Enable the record type for which the plan needs to be created.



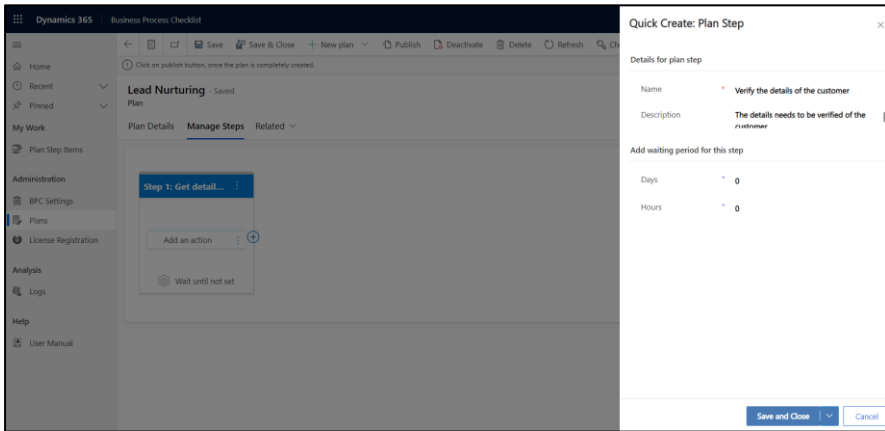
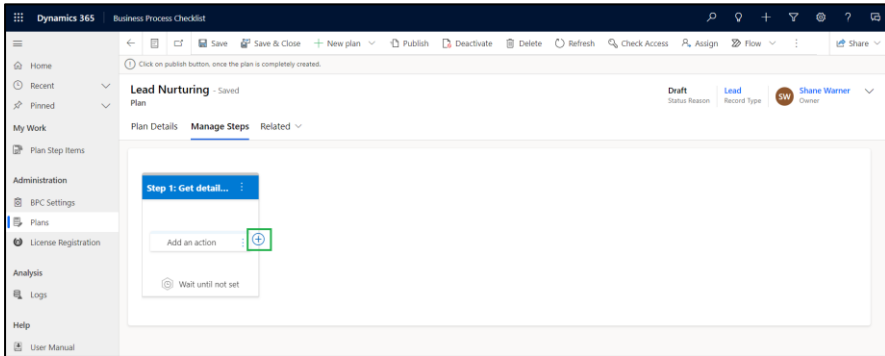
Plan

Managers can create different plans (such as Processes or Checklists) for their salespersons to follow by filling in the necessary details against the record. Further, in advance manager can also create various plans against Business Process Flow and Custom groups.



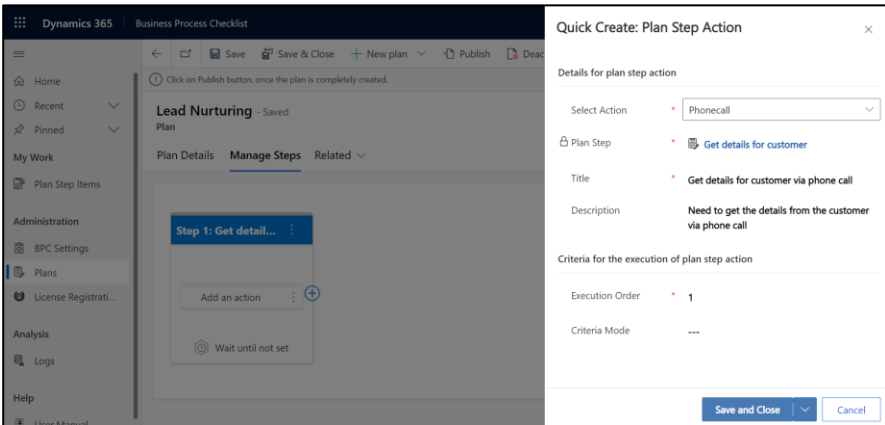
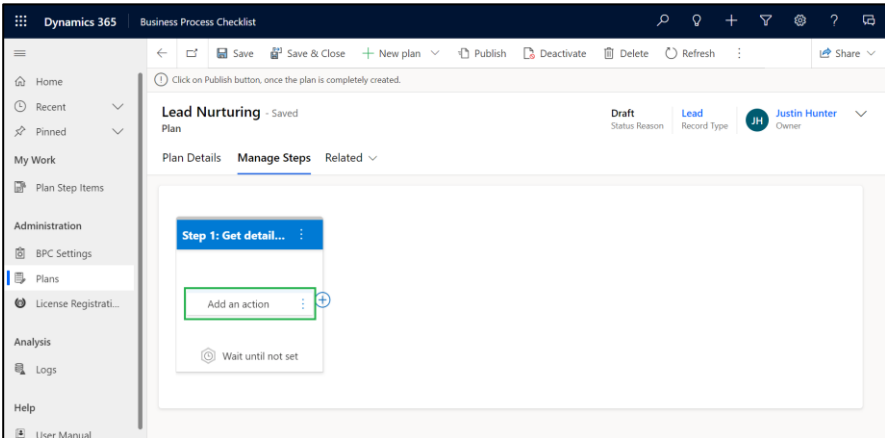
Plan Steps

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



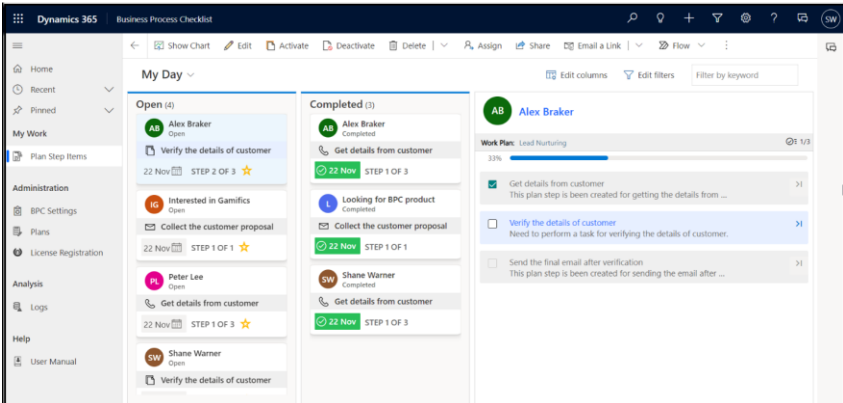
Plan Step Actions

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



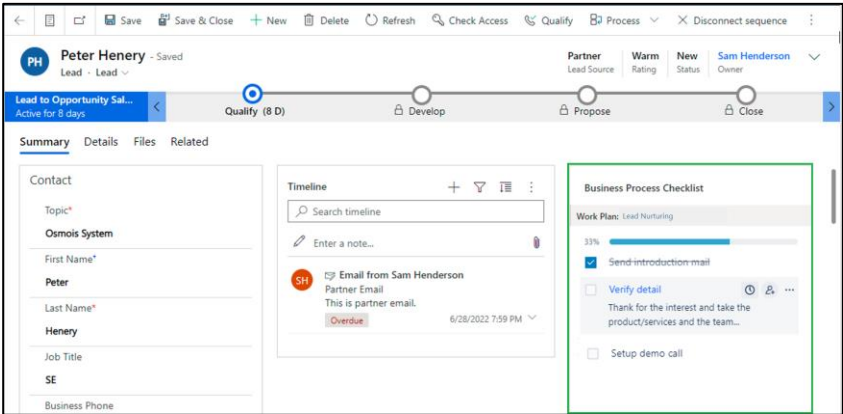
Auto Attach the Plan to Record

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



View Plan Items on Record

According to the criteria, the plan will be attached to the record, where salespeople can complete their steps on “one-click”, and can also see the progress of the plan.



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