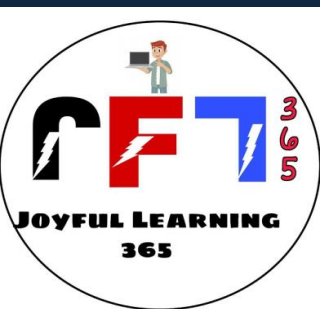


Business Process Flows (BPF)

MS Dynamics 365 CRM

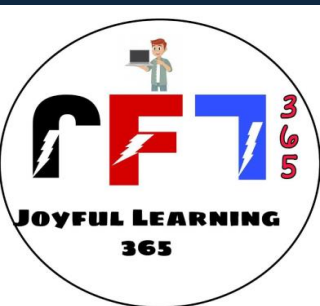


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BUSINESS PROCESS FLOWS IN DYNAMICS 365

Business Process Flows in Dynamics 365 are used to help records go through a particular business process, and also help users in creating and updating these records.



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There are several process flows in MS Dynamics 365 already set up:



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Dynamics 365 Settings ▾ Processes >

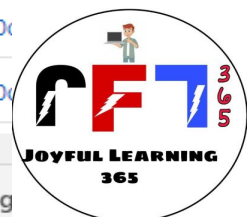
Web client experience for security settings is being deprecated Please use the Power Platform admin center to leverage the latest experience and manage security settings [Learn More](#)

+ NEW DELETE | EMAIL A LINK | FLOW | EXPORT TO EXCEL | VIEW NEW SYSTEM VIEW CUSTOMIZE ENTITY SYSTEM VIEWS ...

All Processes ▾ Search for records

<input type="checkbox"/>	Process Name	Category ▾	Primary Entity	Status ▾	Created On ▾	Owner	Owning
	New Process	Business Process Flow	Knowledge Article	Activated	4/5/2024 10:...	SYSTEM	org0d330644
	IoT Alert to Case Process	Business Process Flow	IoT Alert	Activated	4/5/2024 4:1...	SYSTEM	org0d330644
	Update Contact	Business Process Flow	Contact	Activated	4/5/2024 12:...	SYSTEM	org0d330644
	Lead to Opportunity Sales Process	Business Process Flow	Lead	Activated	4/5/2024 4:2...	SYSTEM	org0d330644
	Phone to Case Process	Business Process Flow	Case	Activated	4/5/2024 3:4...	SYSTEM	org0d330644
	Follow up with Opportunity	Business Process Flow	Opportunity	Activated	4/5/2024 4:2...	SYSTEM	org0d330644
	Translation Process	Business Process Flow	Knowledge Article	Activated	4/5/2024 10:...	SYSTEM	org0d330644
	Sales Process	Business Process Flow	Opportunity	Activated	4/5/2024 4:2...	SYSTEM	org0d330644

1 - 11 of 11 (0 selected) | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Page

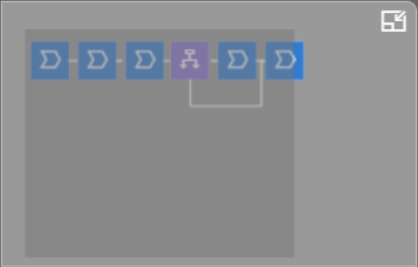
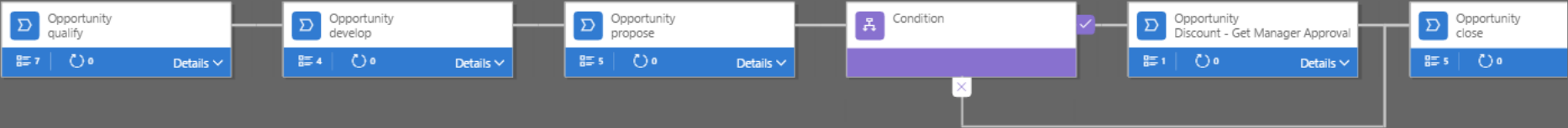


For example, the Opportunity Sales Process guides the opportunity through qualify, develop, propose and close.

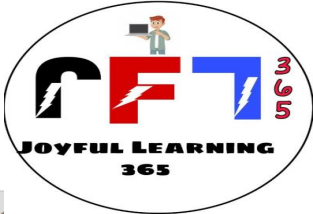


BUSINESS PROCESS FLOW
Opportunity Sales Process
Details ▾

- + Add
- ✂ Cut
- 📄 Copy
- 📄 Paste
- 🗑 Delete
- 📷 Snapshot
- 🔗 Connector



Global Workflow (0)



Components

Search components....

Flow

Stage

Condition

Composition

Step

Workflow



For example, the Opportunity Sales Process guides the opportunity through qualify, develop, propose and close.



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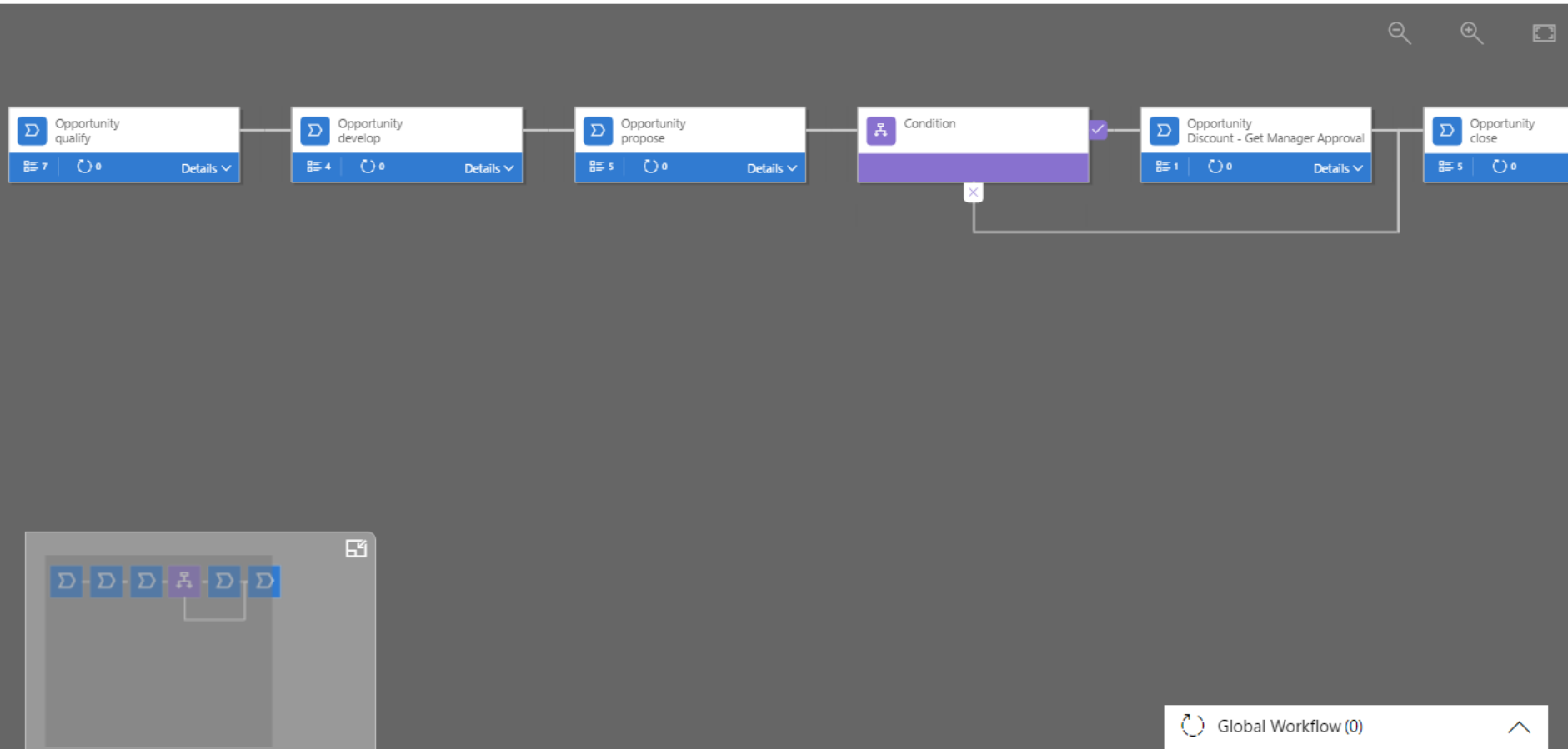
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BUSINESS PROCESS FLOW

Opportunity Sales Process

Details ▾

+ Add ✂ Cut 📄 Copy 📄 Paste 🗑 Delete 📷 Snapshot 🔗 Connector



Components

Properties

Search components.... 🔍

Flow

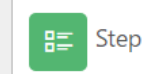


Stage



Condition

Composition



Step



Workflow



Similarly with the Lead to Opportunity Sales Process.
Selecting a stage will display the steps of the stage:



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BUSINESS PROCESS FLOW

Lead to Opportunity Sales Process

Details ▾



Add



Cut



Copy



Paste



Delete



Snapshot



Connector

Lead qualify

7 | 0

Details ▾

Opportunity develop

4 | 0

Details ▲

Steps (4)

Step #1
Customer Need

Step #2
Proposed Solution

Step #3
Identify Stakeholders

Step #4
Identify Competitors

Workflows (0)

Opportunity propose

4 | 0

Details ▾

Opportunity close

5 |



Global Workflow (0) ▲

Components Properties

Step

Display Name

Customer Need

Data Field

Customer Need ▼

☐ Required

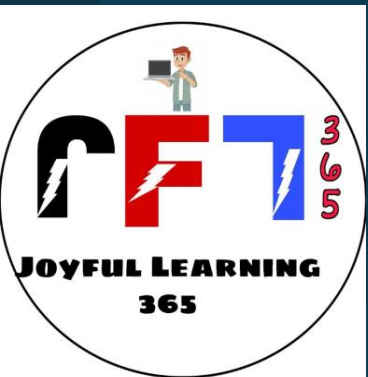
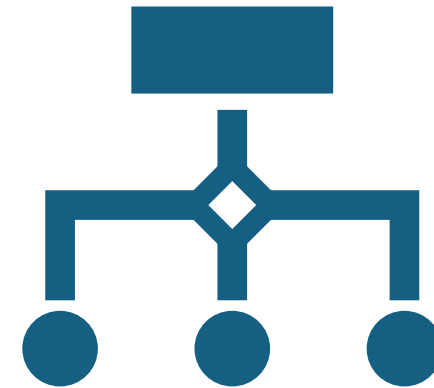
Sequence

1 ▼

Apply

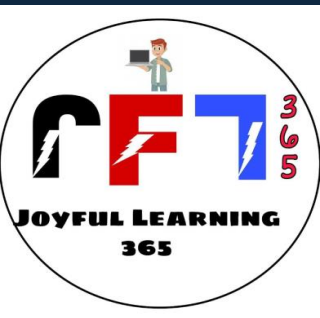
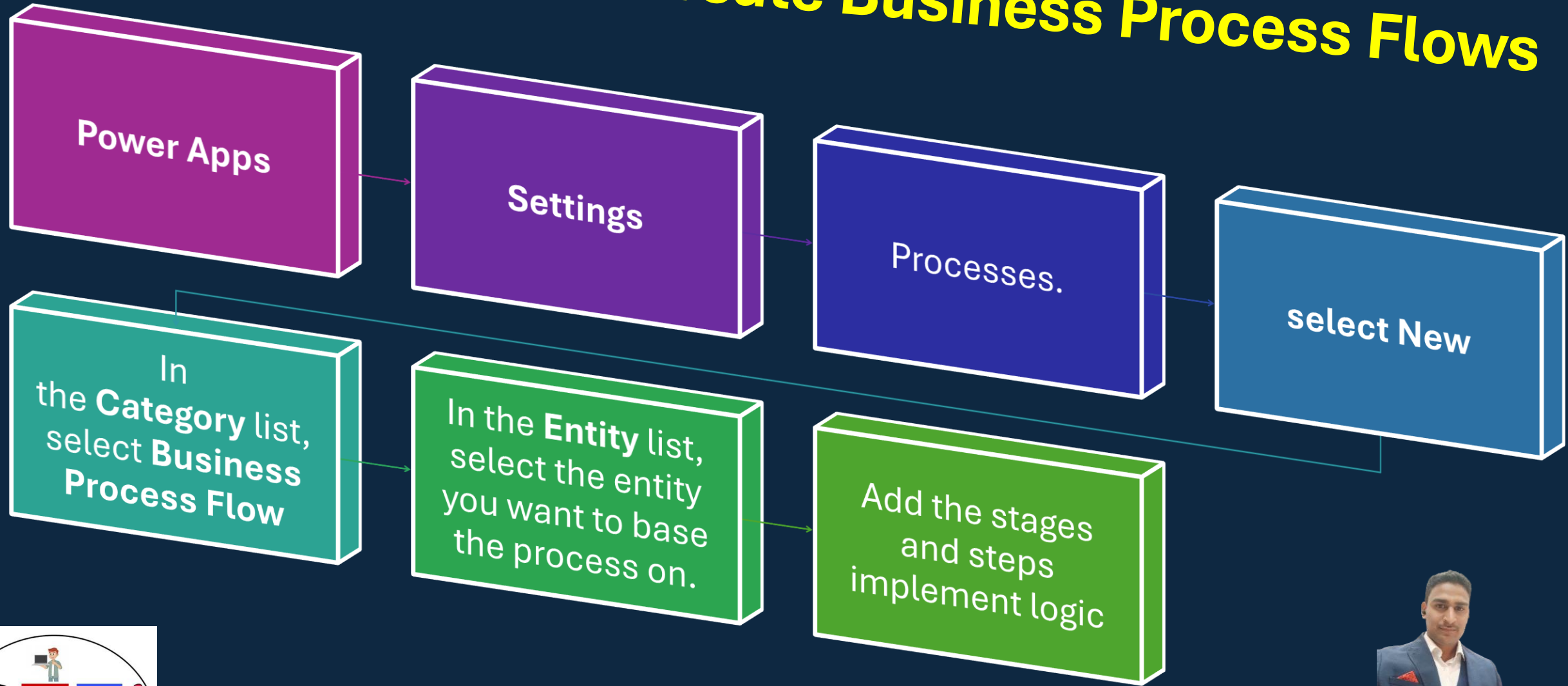
Discard

How to create Business Process Flows?



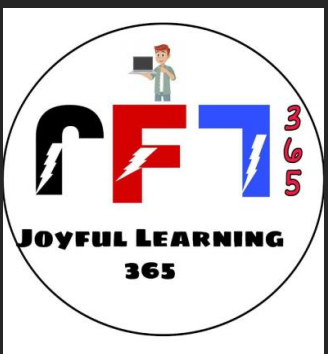
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Steps to create Business Process Flows



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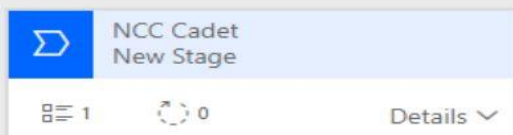
Create a business process flow



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1. Make sure that you have the System Administrator or System Customizer security role or equivalent permissions.
2. Open solution explorer.
3. On the left navigation pane, select **Processes**.
4. On the **Actions** toolbar, select **New**.
5. In the **Create Process** dialog box, complete the required fields:
 1. Enter a process name. The name of the process doesn't need to be unique, but it should be meaningful for people who need to choose a process. You can change this later.
 2. In the **Category** list, select **Business Process Flow**.
 3. You cannot change the category after you create the process.
 4. In the **Entity** list, select the entity you want to base the process on.
 5. The entity you select affects the fields available for steps that can be added to the first stage of the process flow. If you don't find the entity you want, make sure the entity has the Business process flows (fields will be created) option set in the entity definition. You cannot change this after you save the process.
6. Choose **OK**.
7. The new process is created, and the business process flow designer opens with a single stage already created for you.



Components Properties

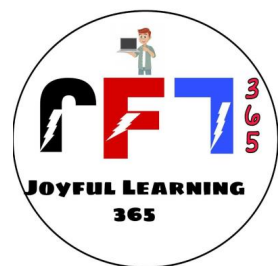
Flow



Composition



Drag Components to design the window, and set the properties to create a business process flow

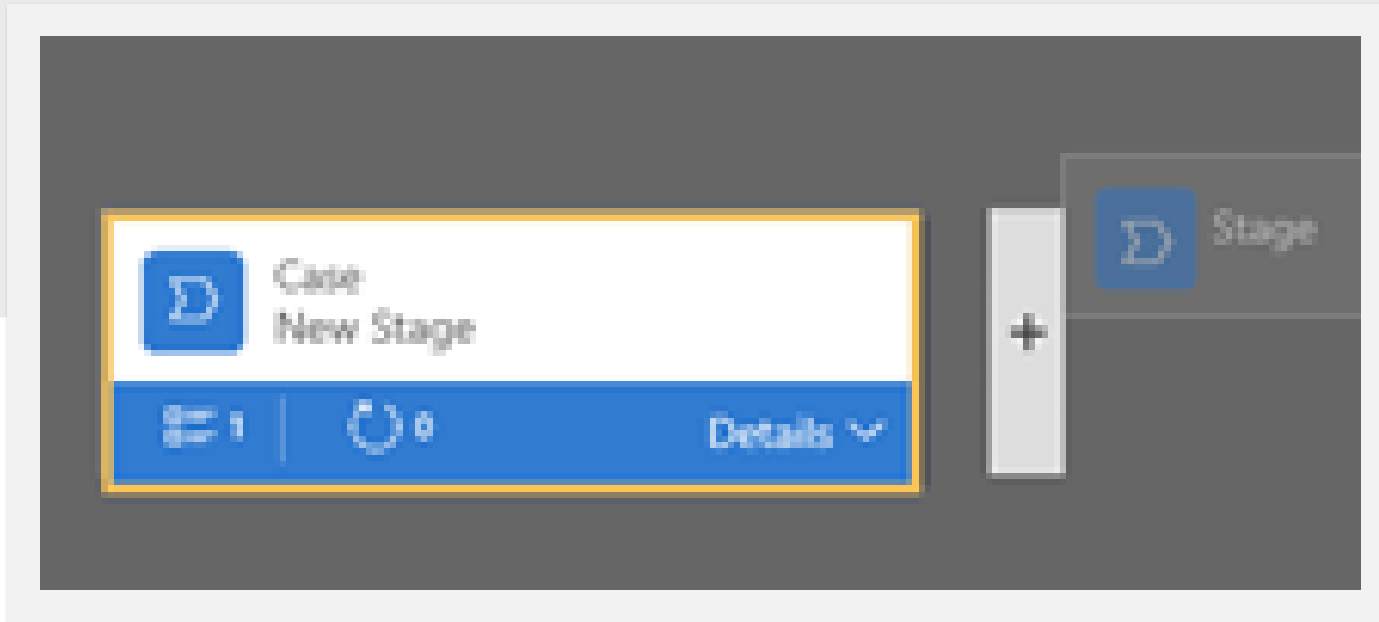


The new process is created, and the business process flow designer opens with a single stage already created for you

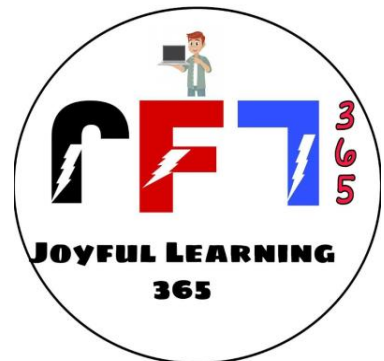
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Add stages. If your users will progress from one business stage to another in the process:



- Drag a **Stage** component from the **Components** tab and drop it on a + sign in the designer



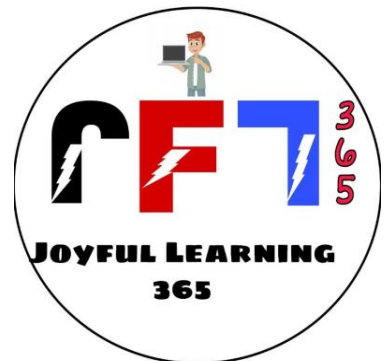
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To set the properties for a stage, select the stage, and then set the properties in the **Properties** tab on the right side of the screen



Enter a display name.

If desired, select a category for the stage. The category (such as **Qualify** or **Develop**) appears as a chevron in the process bar.



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Which composition we can add in BPF

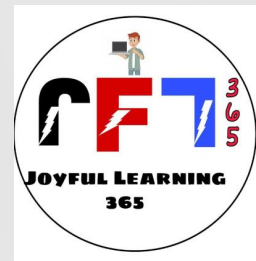
4 Types

1) Data Step

2) Workflow

3) Action Step

4) Flow Step

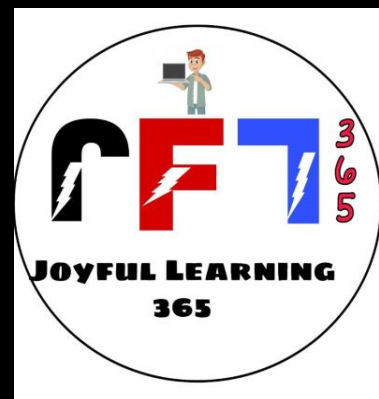


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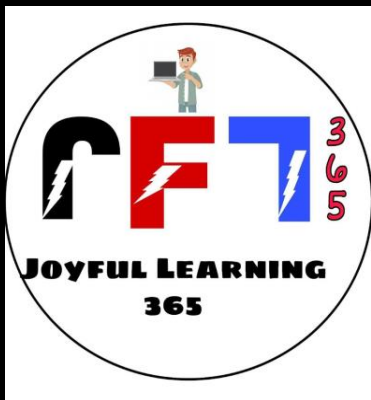
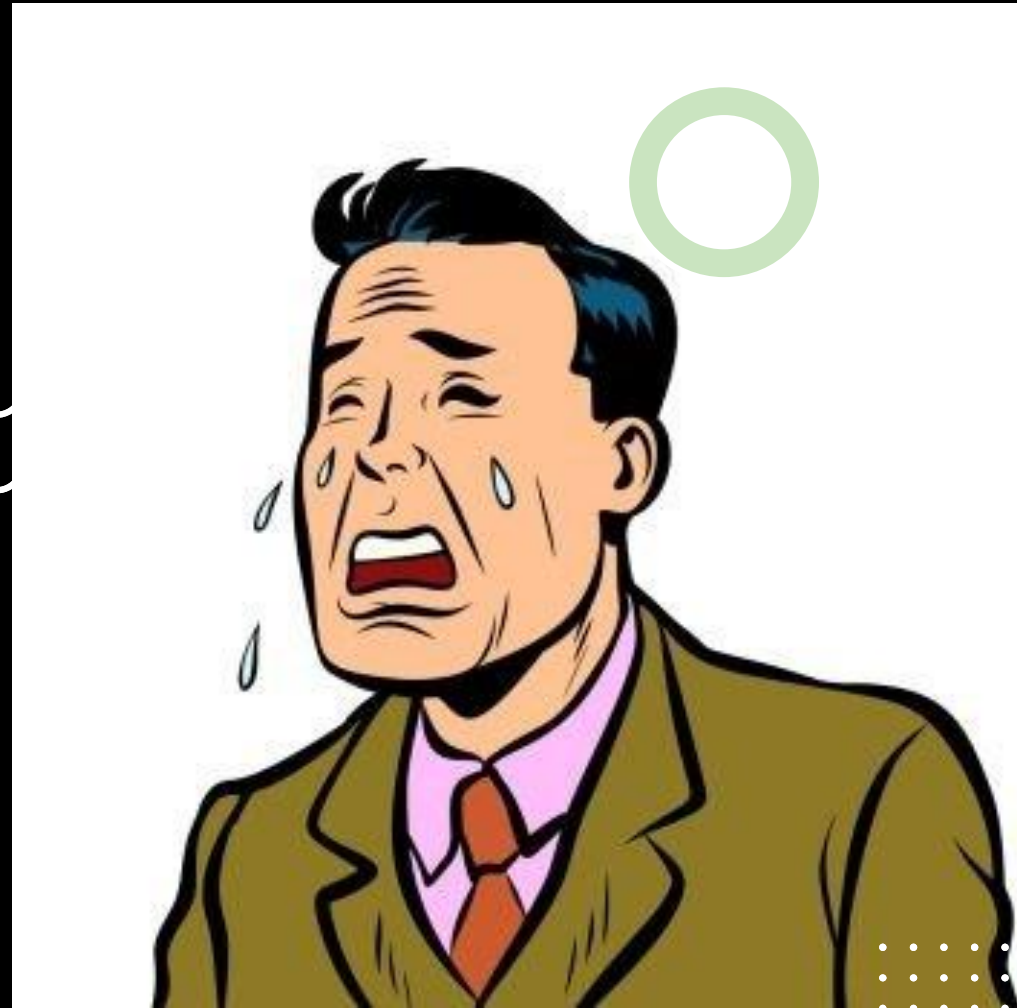
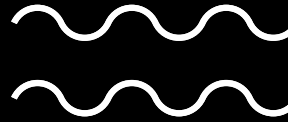
I'm So Sorry

Business Process Flow Not Showing?



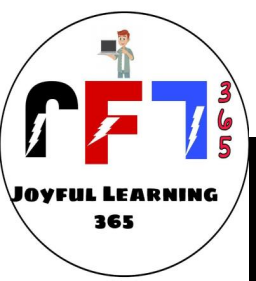
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I've created a business process flow to include in my form. However, when I navigate to the published app, it doesn't appear.



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1) Add the bpf into the model driven app.

+

Add

✎

Edit

🗑

Remove

🔍

Search Canvas

?

Help

Site Map

📖

Site Map

✎

Dashboards

📊

Dashboards

4

▼

Business Process Flows

🔄

Business P...

3

▼

▼ Entity View (71)

[DEPRECA...]

📄

Forms

All

📅

Views

All

📊

Charts

All

📊

Dashboards

A

[DEPRECA...]

📄

Forms

All

📅

Views

All

📊

Charts

All

📊

Dashboards

A

Components

Properties

←

Back

Select Business Proc...

Create New

🔍

Search

☐ All

☐ IoT Alert to Case Process
Use this process flow to con...

☒ Lead to Opportunity Sales ...
This is the default process fl...

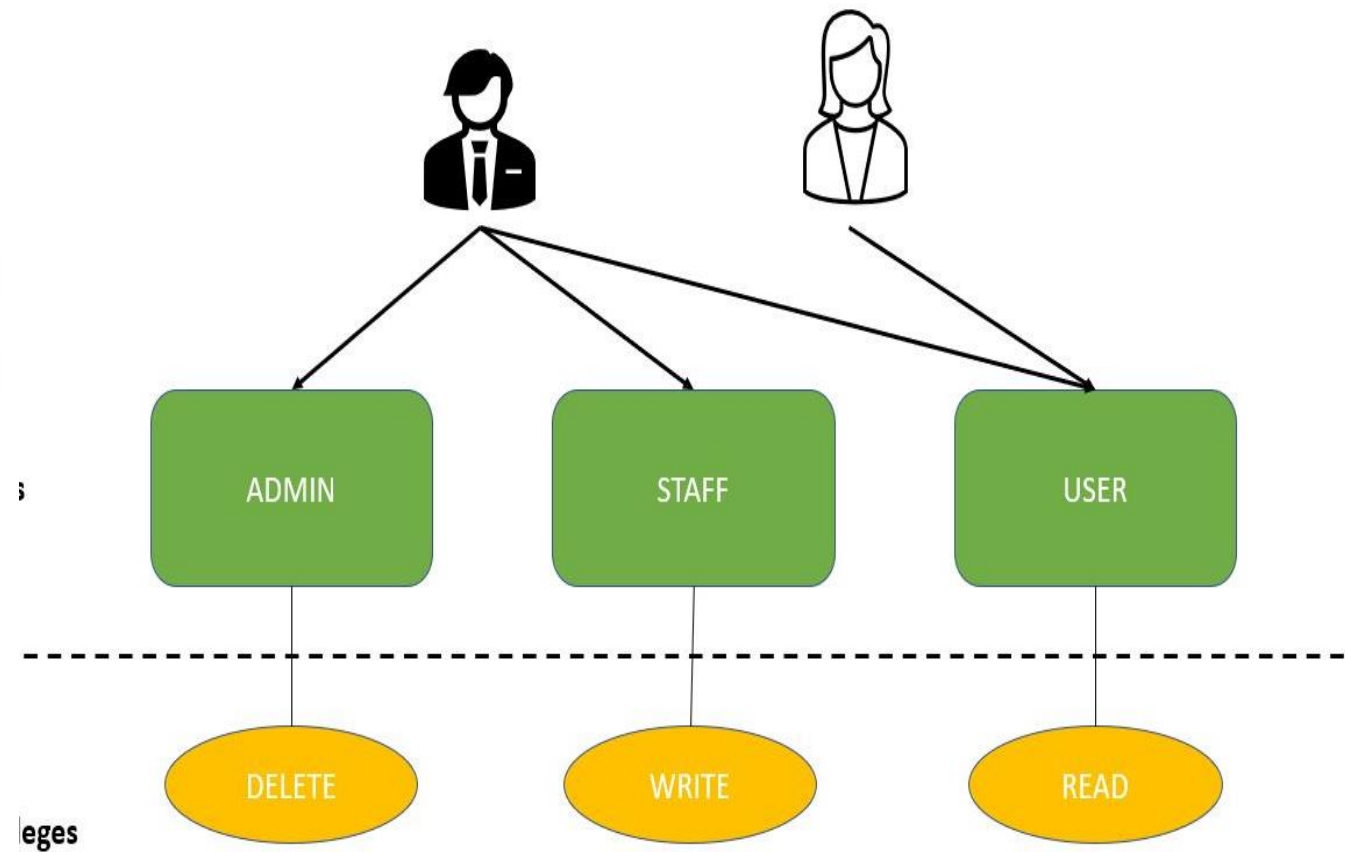
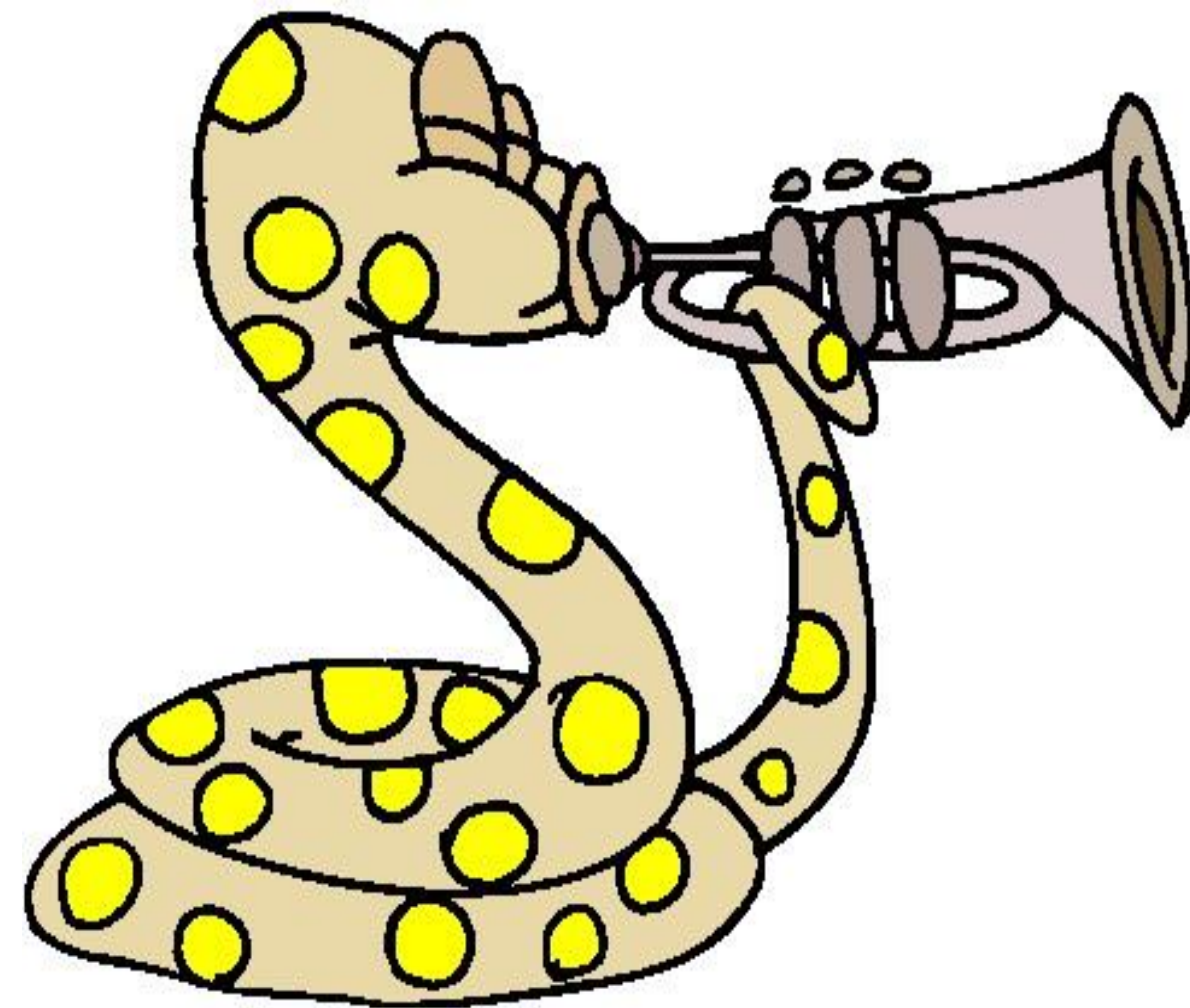
☐ New Process
This is the default process fl...

☒ Phone to Case Process
This is the default process fl...

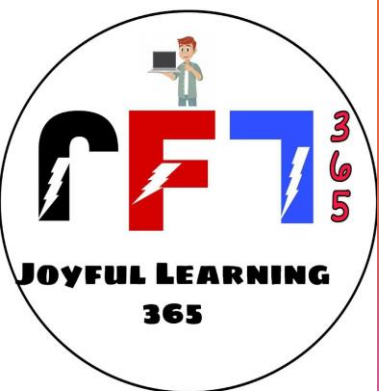
☒ Sales Process
This is the default process fl...

☐ Testing BPF

☐ Translation Process



2 Make sure that the security role the user was assigned which has sufficient permissions to run BPF.

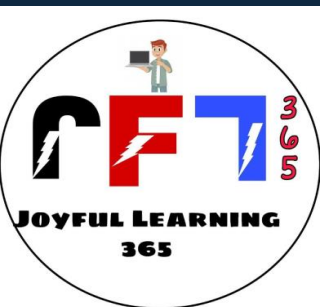
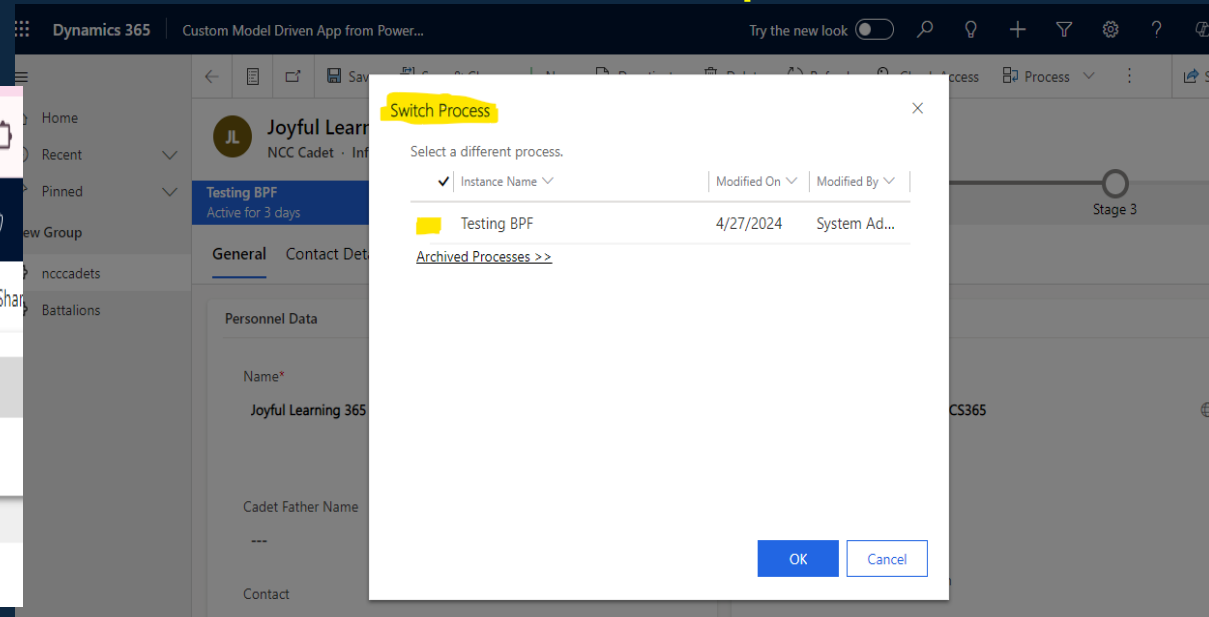
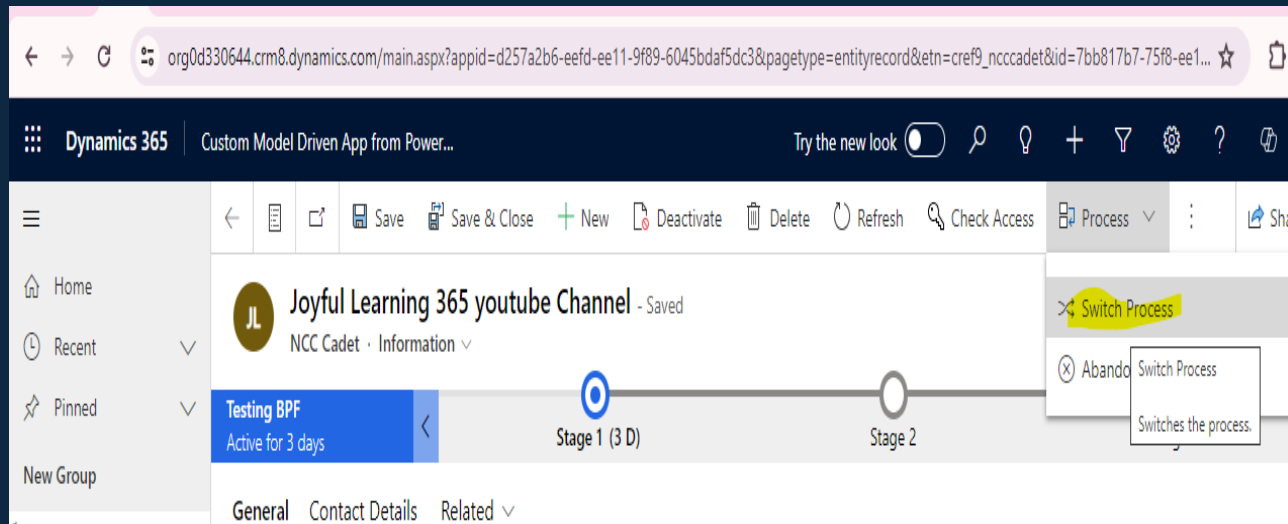


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3) For Existing records, BPF won't show directly

You need to click on ribbon “Switch Process ” to switch the process and select the BPF as Shown below



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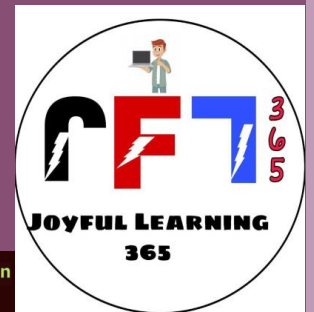
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To provide control over who can **create, read, update, or delete** the business process flow instance, select **Edit Security Roles** on the command bar of the designer.

For service-related processes, you could provide full access for customer service reps to change the business process flow instance, but provide read-only access to the instance for sales reps so they can monitor post-sales activities for their customers.



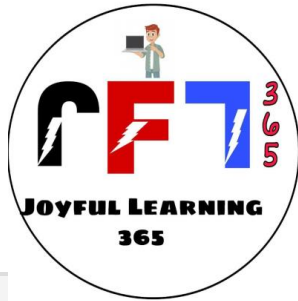
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In the Security Roles screen, select the name of a role to open the security role information page. Select the Business Process Flows tab, and then assign appropriate privileges on the business process flow for a security role.



Security Role: Common Data Service User



Details Core Records Business Management Customization Missing Entities **Business Process Flows** Custom Entities

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Expired Process	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		
Idea to Project Business Process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
My BPF	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
New Process	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		
Challenge Management Process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Translation Process	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>		



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Note: The System Administrator and System Customizer security roles have access to new business process flows by default.



When a Business Process Flow (BPF) is created, a custom entity is created automatically with the same name.



Solution Default Solution

- Opportunity Sales Process
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships
 - Messages
 - Business Rules
 - Dashboards
- Opportunity Sales Process v2
- OpportunityModelConfig
- Order
- Order Close

General Primary Field Controls

Entity Definition

Display Name * Opportunity Sales Process

Plural Name * Opportunity Sales Process

Name * opportunitysalesprocess

Primary Image

Color

Description Base entity for process Opportunity Sales Process

☐ Virtual Entity

Data Source [None]

Ownership * Organization

☐ Define as an activity entity.

☐ Display in Activity Menus

Areas that display this entity

Settings

The custom entity enhances how business process flow data can be used in reporting and automation and adds a granular level of control in security. With automation (workflow or flow) you can create the custom entity record to start the process on the target record as well as modify the progress on the BPF including completing or abandoning the process.

Maximum number of processes, stages, and steps

01

There can be no more than 10 activated business process flow processes per table.

02

Each process can contain no more than 30 stages.

03

Each stage is limited to 30 steps.

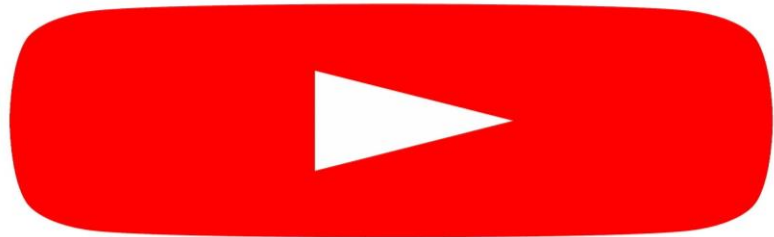
04

Multi-table processes can contain no more than five tables.

<https://www.youtube.com/@joyfullearning3659>

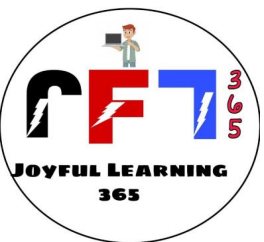


Mohammed.Shafiuddin@joyfullearning3659.onmicrosoft.com



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