Business Process Flows (BPF)

MS Dynamics 365 CRM

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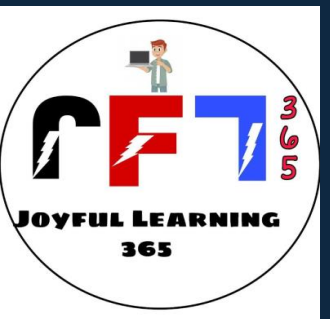
BUSINESS PROCESS FLOWS IN DYNAMICS 365

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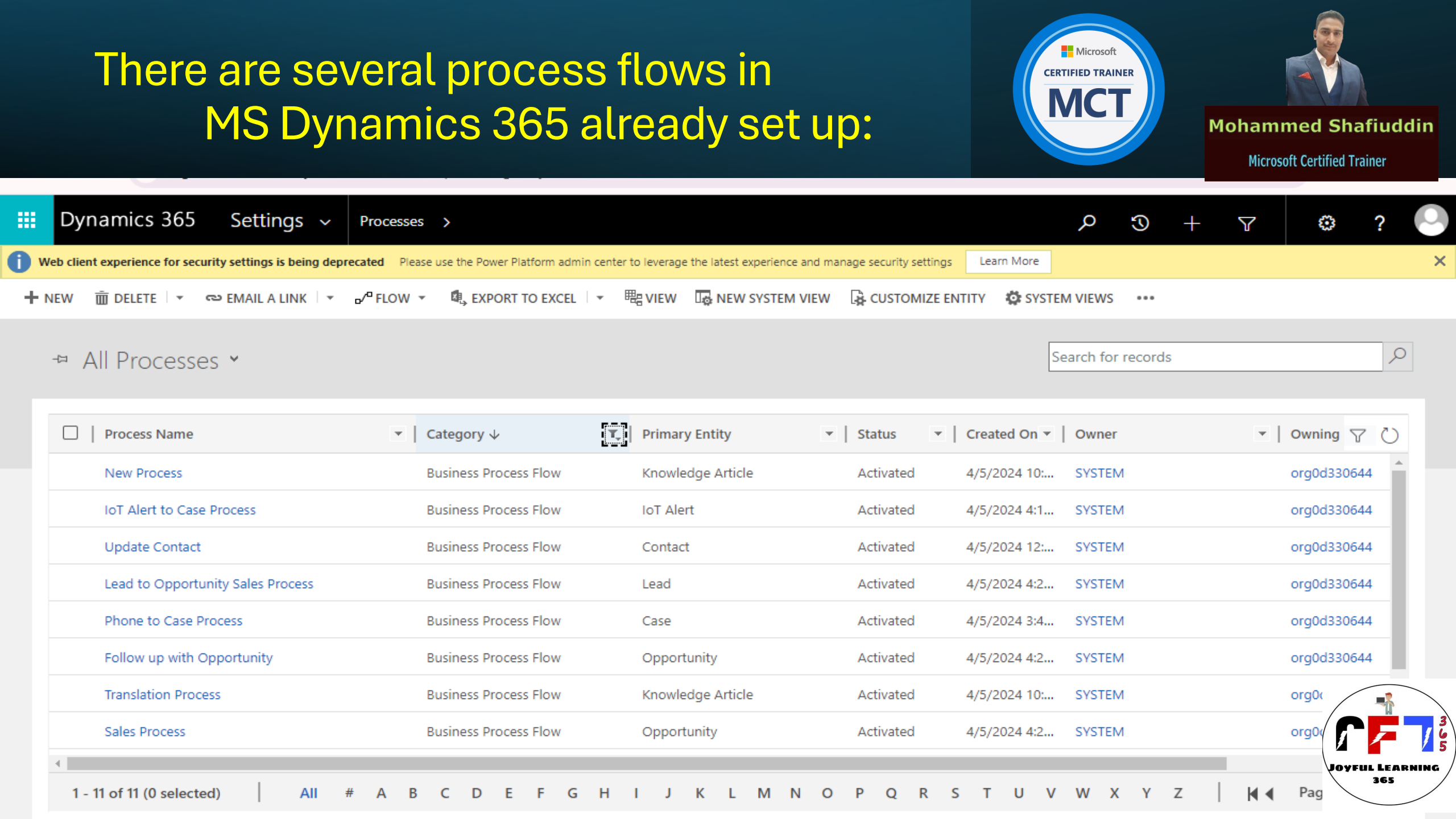
There are several process flows in MS Dynamics 365 already set up:



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

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BUSINESS PROCESS FLOW

Opportunity Sales Process

Details

Add | Cut | Copy | Paste | Delete | Snapshot | Connector

Opportunity qualify → Opportunity develop → Opportunity propose → Condition → Opportunity Discount - Get Manager Approval → Opportunity close

Global Workflow (0)

Components | Pr

Search components....

Flow

Stage | Condition

Composition

Step | Workflow

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

Opportunity qualify | Opportunity develop | Opportunity propose | Condition | Opportunity Discount - Get Manager Approval | Opportunity close

Components Properties

Search components....

Flow

Stage Condition

Composition

Step Workflow

Global Workflow (0)

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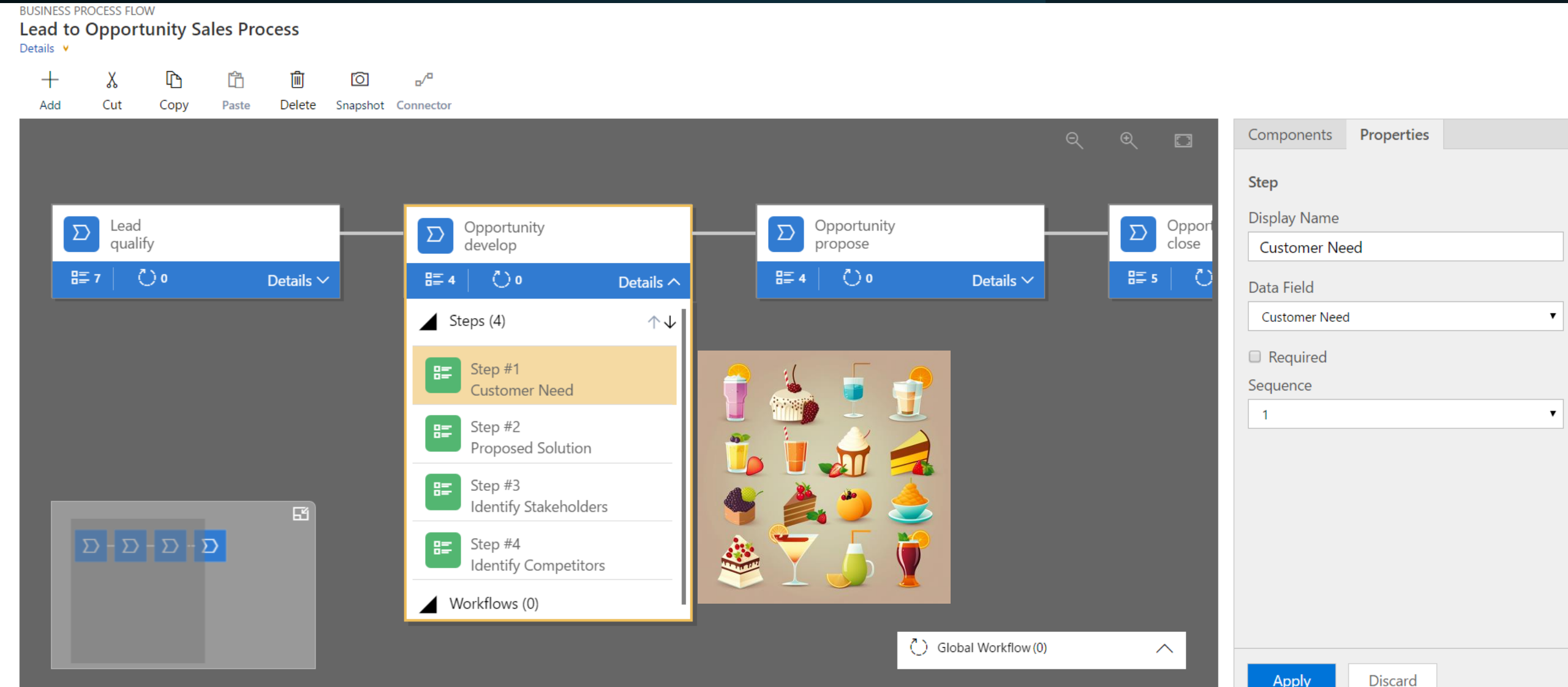
Similarly with the Lead to Opportunity Sales Process. Selecting a stage will display the steps of the stage:



How to create Business Process Flows?

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Steps to create Business Process Flows

Power Apps

Settings

Processes.

select New

In the **Category** list, select **Business Process Flow**

In the **Entity** list, select the entity you want to base the process on.

Add the stages and steps implement logic

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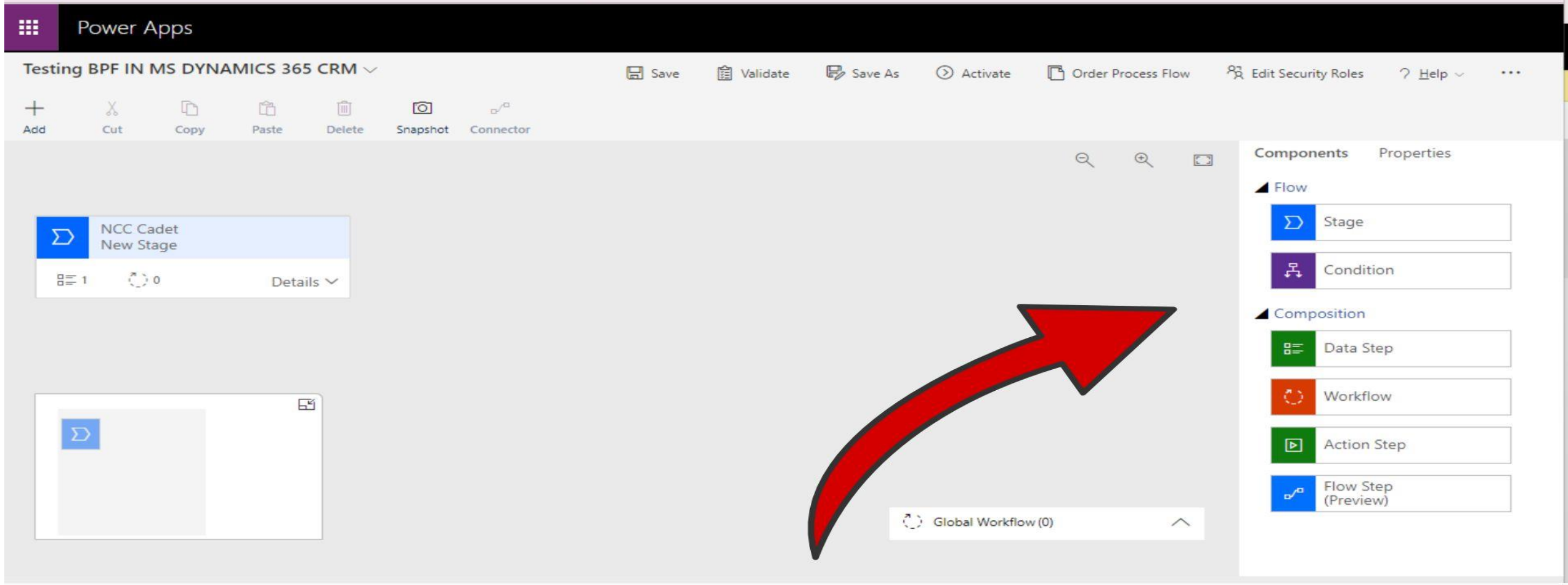
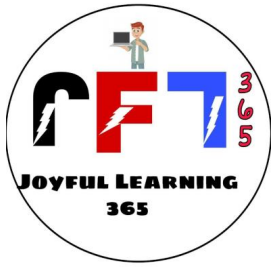
Create a business process flow

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.



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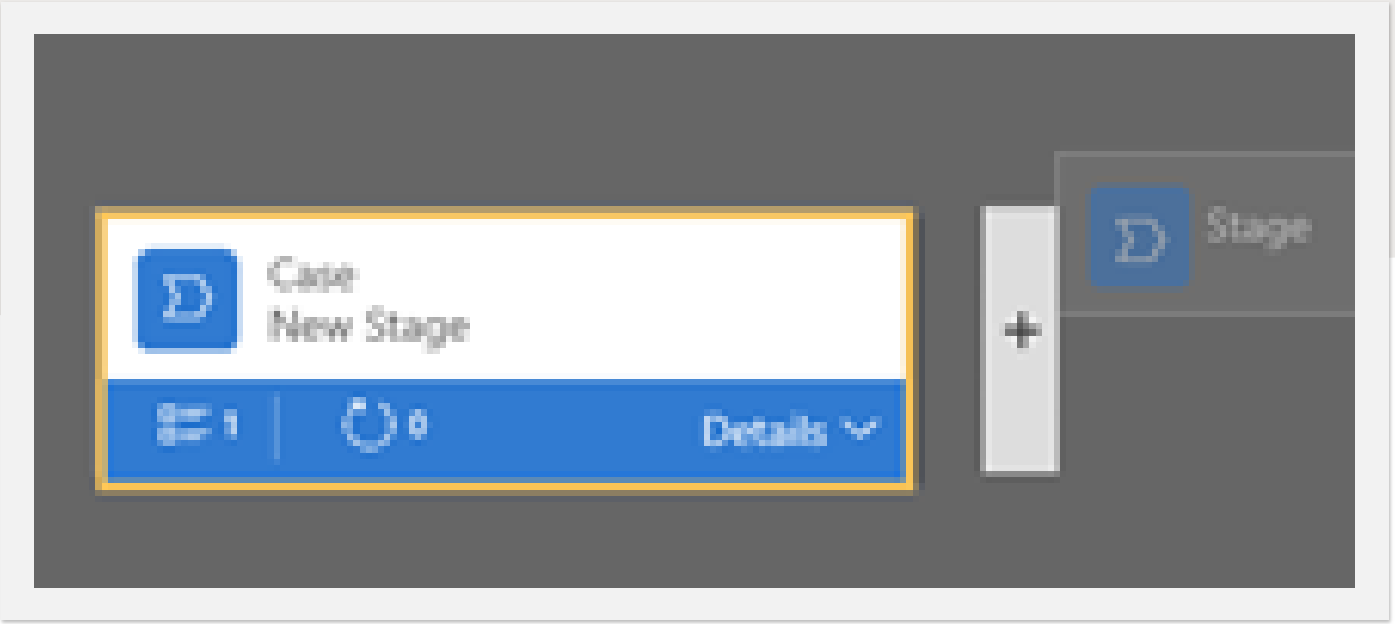
Add stages. If your users will progress from one business stage to another in the process:



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

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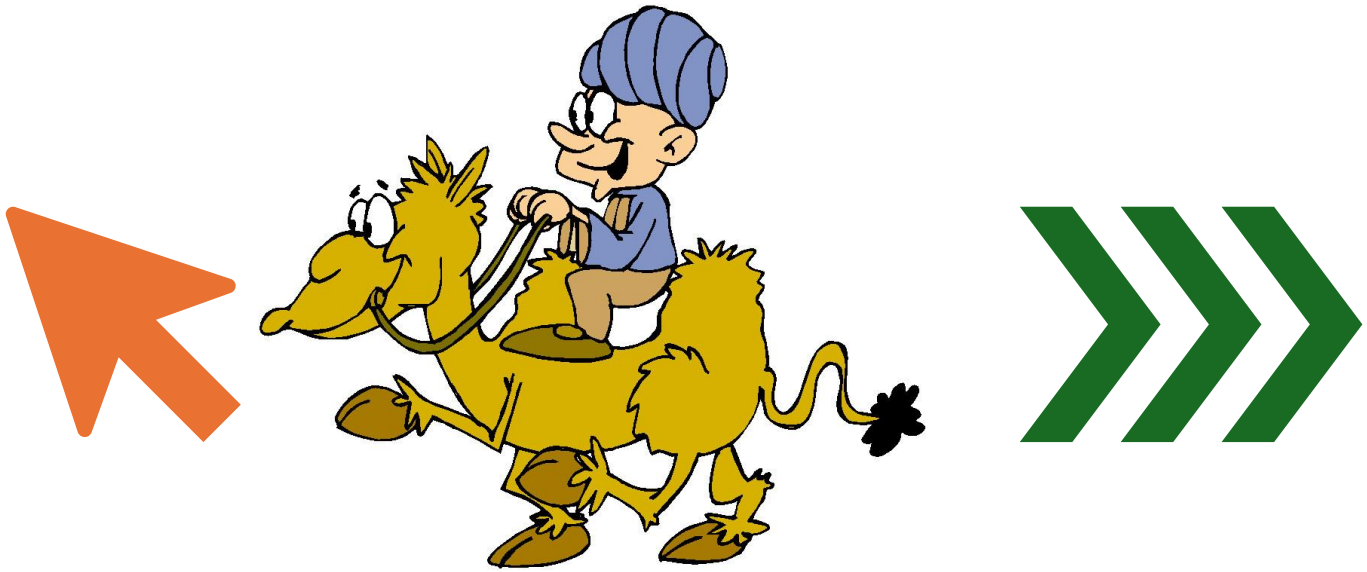
To set the properties for a stage, select the stage, and then set the properties in the **Properties** tab on the right side of the screen



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

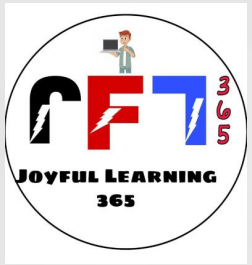
4 Types

1) Data Step

2) Workflow

3) Action Step

4) Flow Step



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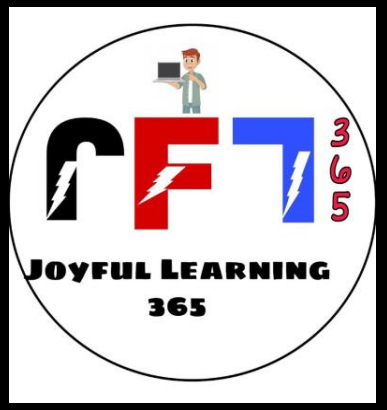
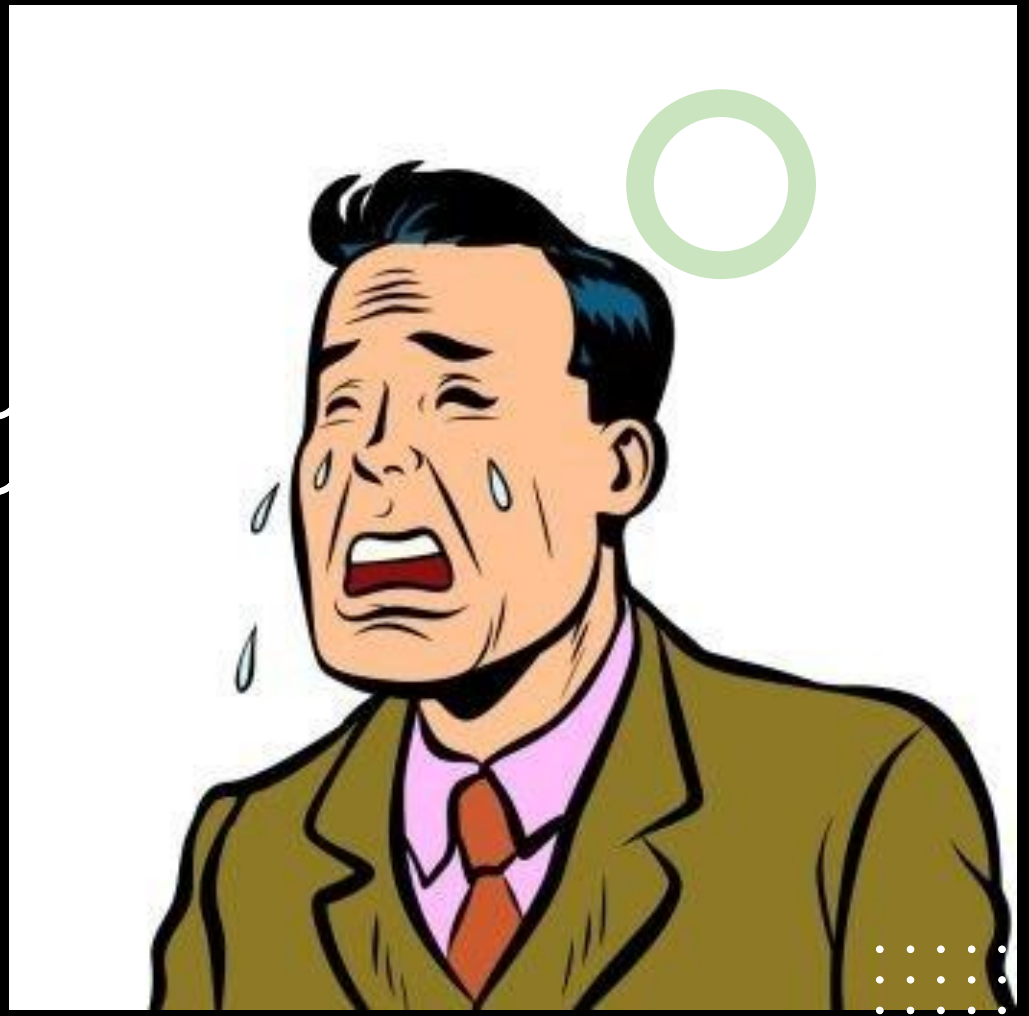
Business Process Flow Not Showing?



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.

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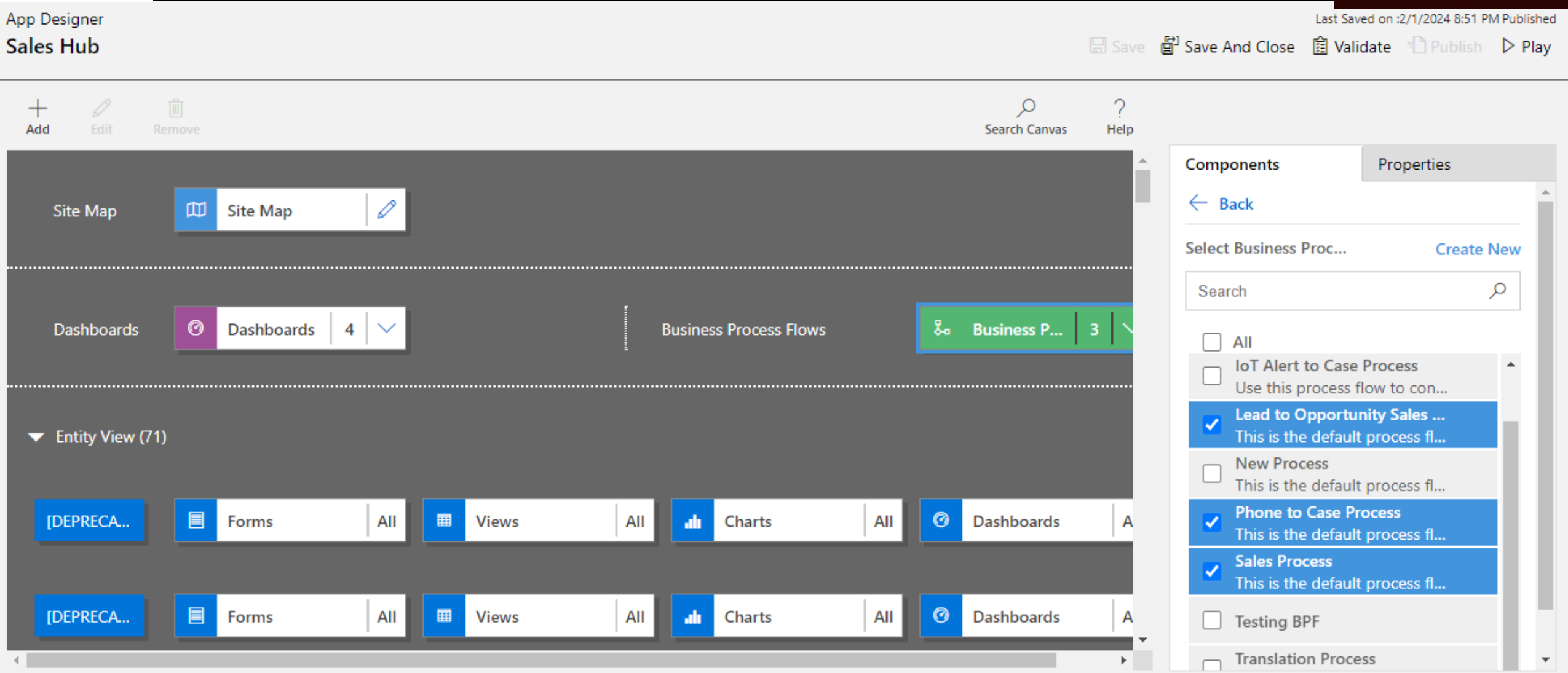

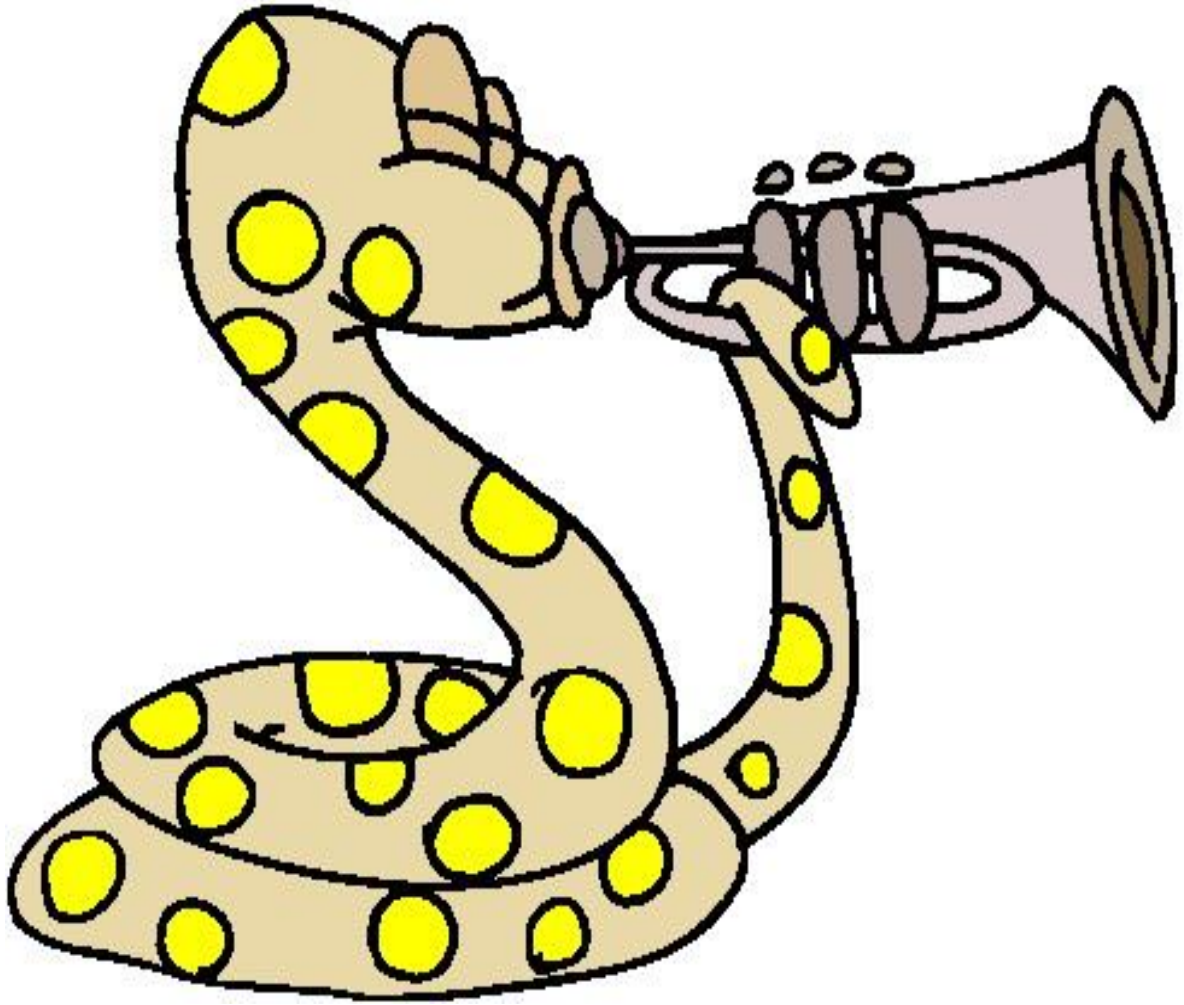

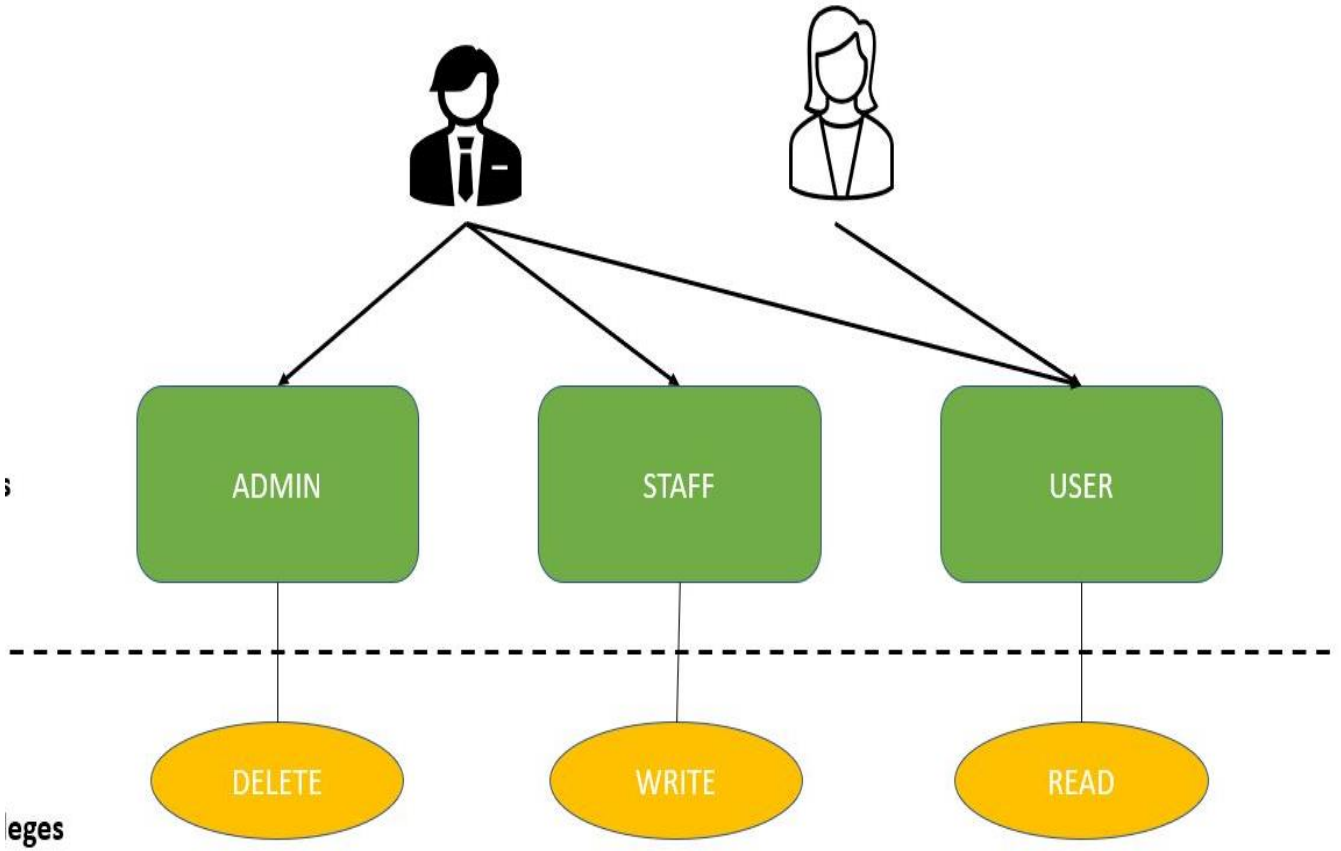

2 Make sure that the security role the user was assigned which has sufficient permissions to run BPF.

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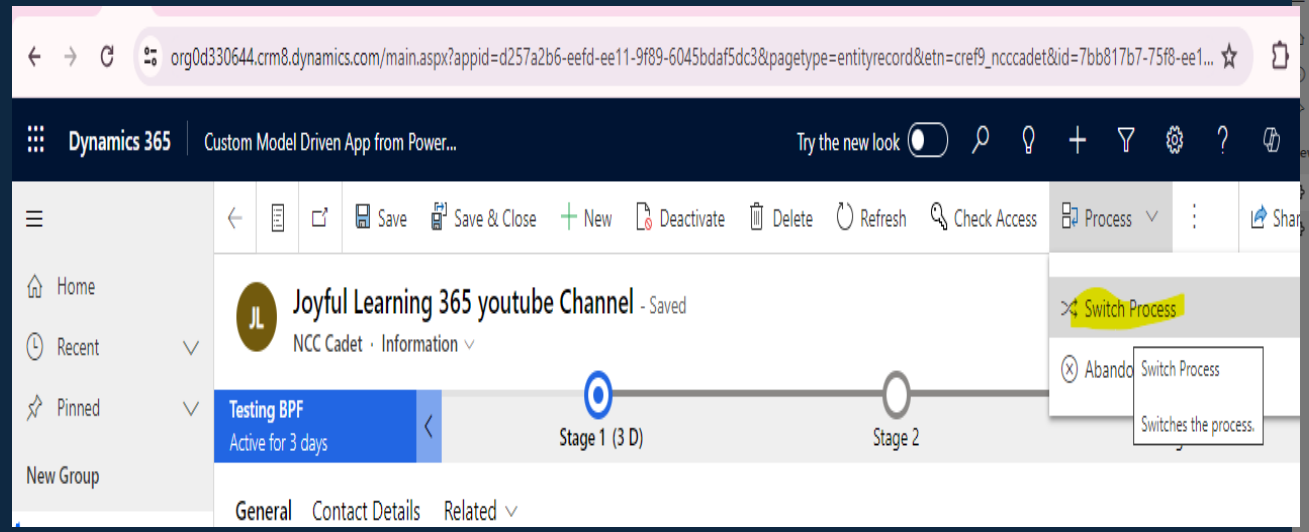
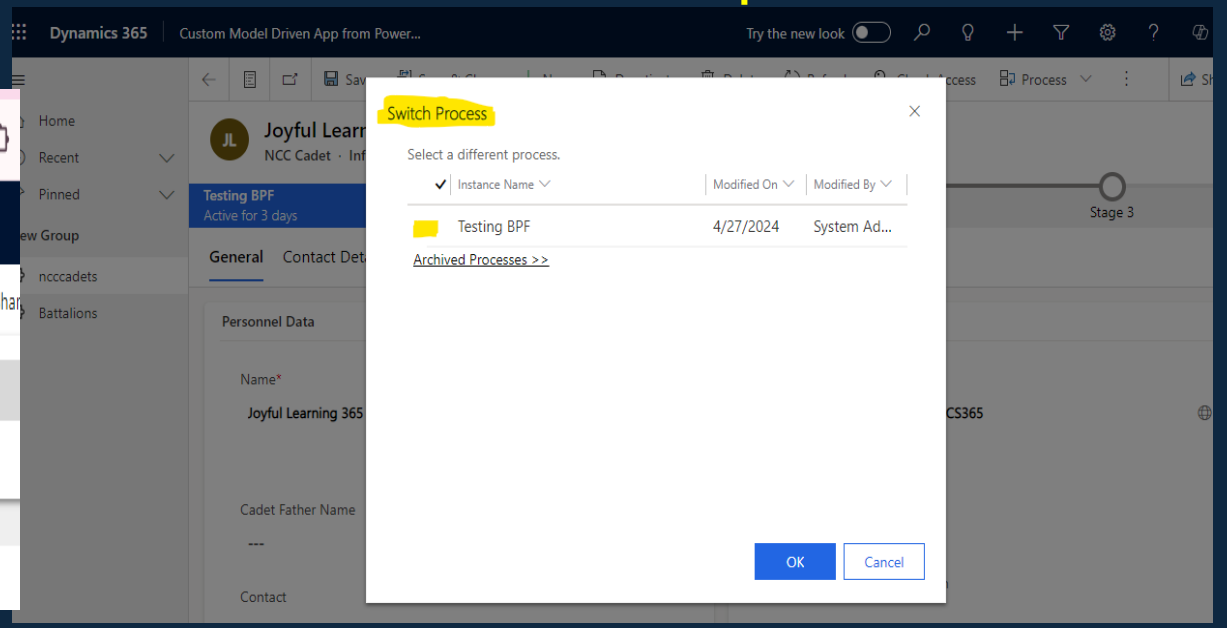
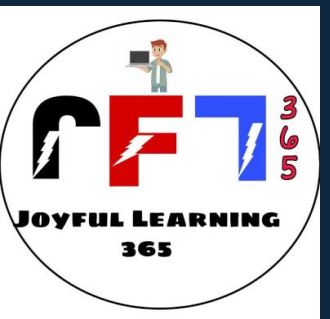
3) For Existing records, BPF won't show directly

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







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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.

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	●	●	●	●	●	●		
Idea to Project Business Process	○	○	○	○	○	○		
My BPF	○	○	○	○	○	○		
New Process	●	●	●	●	●	●		
Challenge Management Process	○	○	○	○	○	○		
Translation Process	●	●	●	●	●	●		

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

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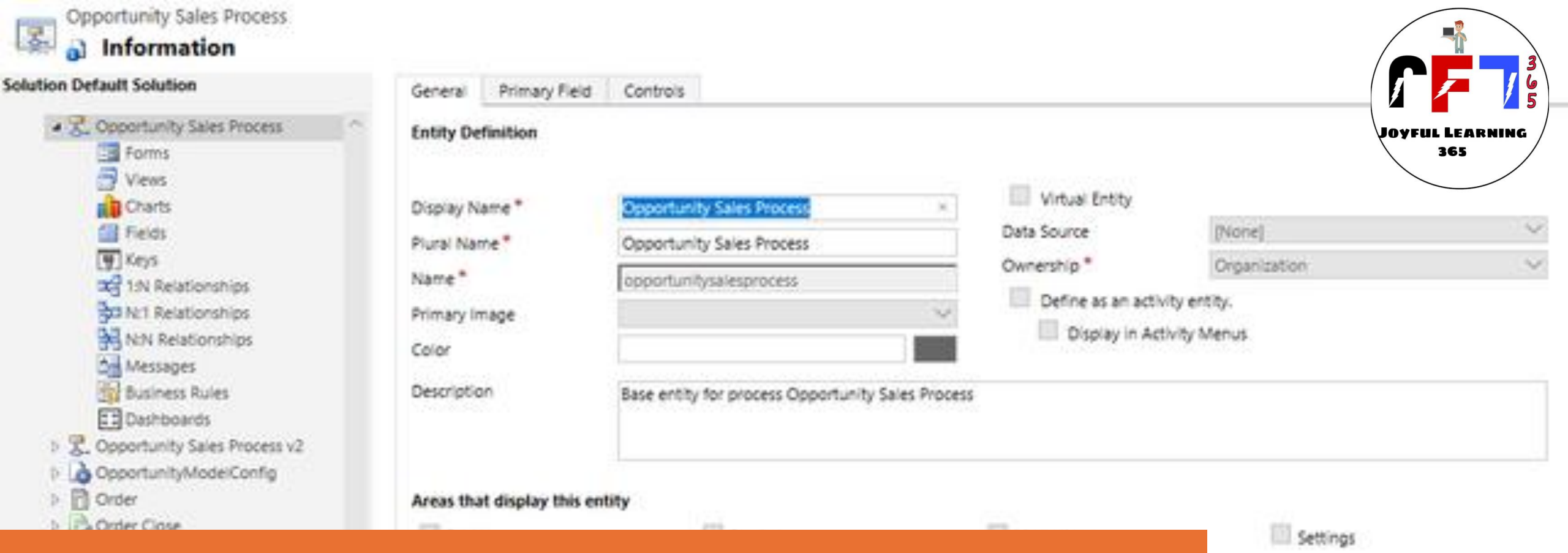
When a Business Process Flow (BPF) is created, a custom entity is created automatically with the same name.



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.

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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.

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