P03: Configuring and Deploying Business Process Flow for Case Management in DQ Support CRM

Wednesday, 23 April 2025 14:24

1. Context

This solution pattern ensures that the **Business Process Flow (BPF)** for **Case Management** in **DQ Support CRM** functions smoothly and is deployed without issues in different environments. It focuses on case routing based on case type, assigning cases to the correct teams, updating the case status, and managing escalations.

Item	Detail
Tag	Power Apps
Contributors	Caroline Ngene | Vincent Kimiti
Version Control	V1.0
Application Use Case	-Applicable when managing customer service cases through BPF in CRM. - Exporting and deploying case management solutions across environments. - Ensuring correct case routing, team assignment, and escalation.
Reference Usage	DQ Support CRM - Case Management Flow, Escalation Path

Story Behind The Pattern

Item	Detail
The Problem	Lack of a structured approach in Power Apps leads to inefficiencies and data inconsistencies.
The Solution	A standardized workflow with clear steps and validation ensures accuracy and efficiency.
Dependencies	N/A

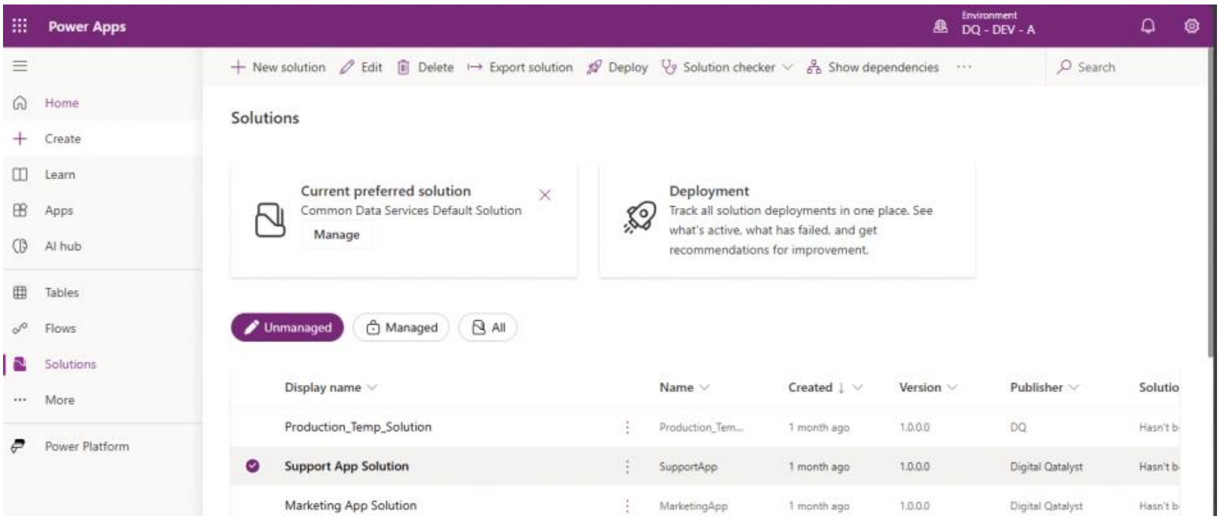
The Pattern

1. Login to Power Apps

- Navigate to Power Apps.
- Enter your credentials and log in.
- Ensure you are in the correct environment: DQ-DEV-A

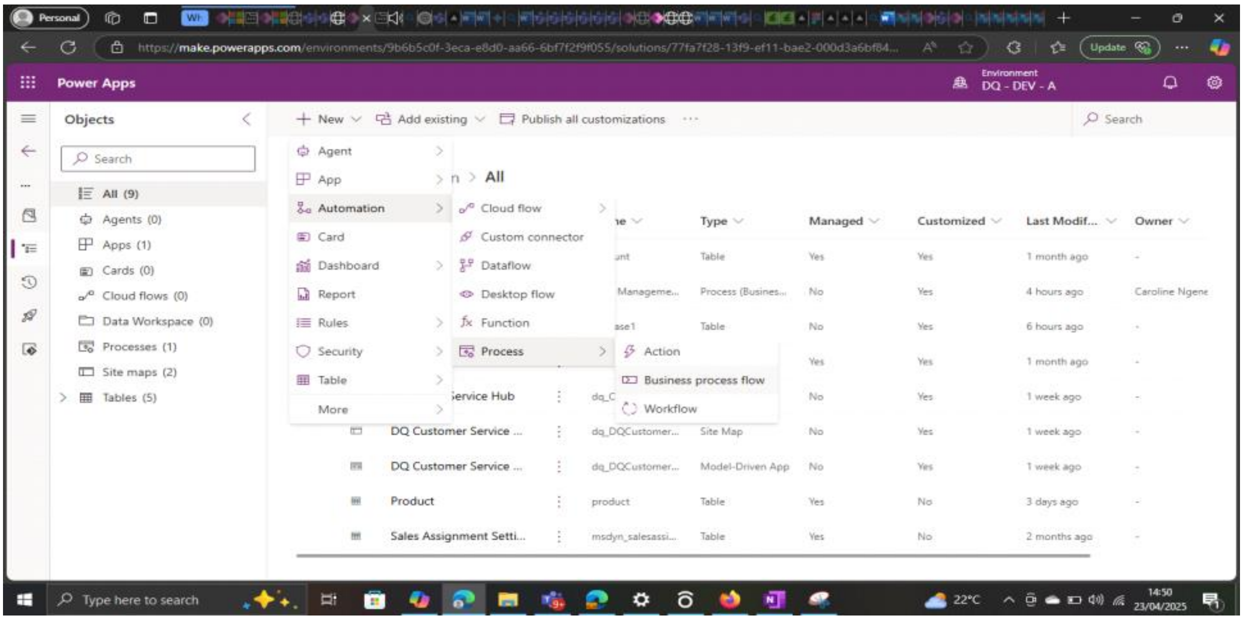
2. Access the Solution

- Click on **Solutions**.
- Select **Support App Solution**

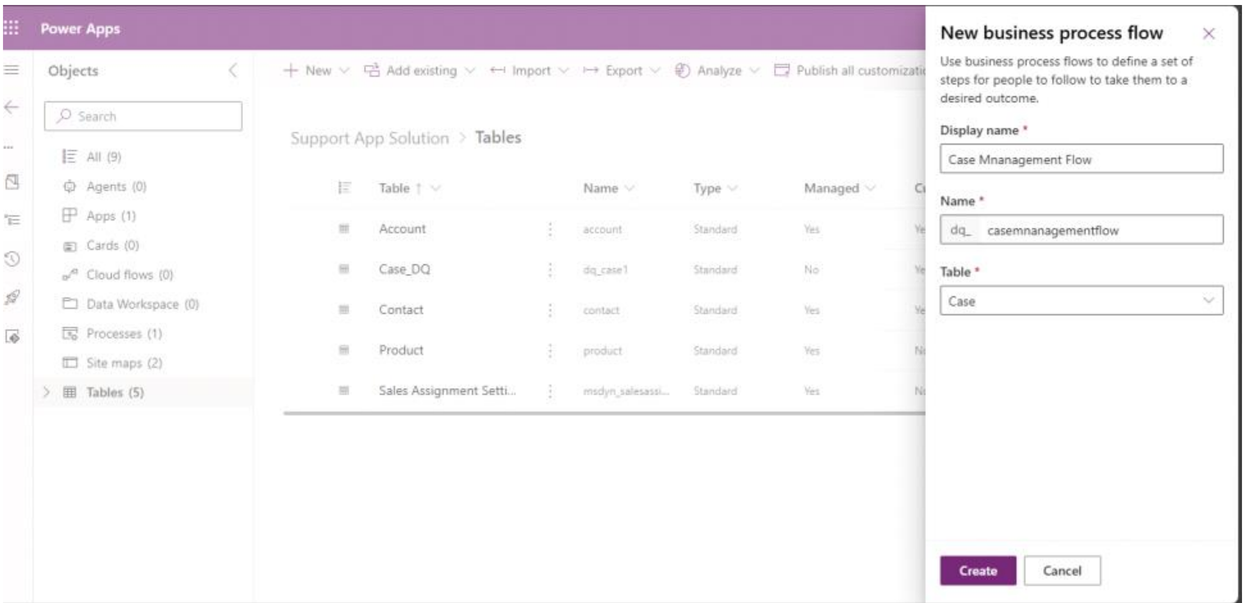


3. Create a New Business Process Flow

- Click **New** > **Automation** > **Processes** > **Business Process Flow**.

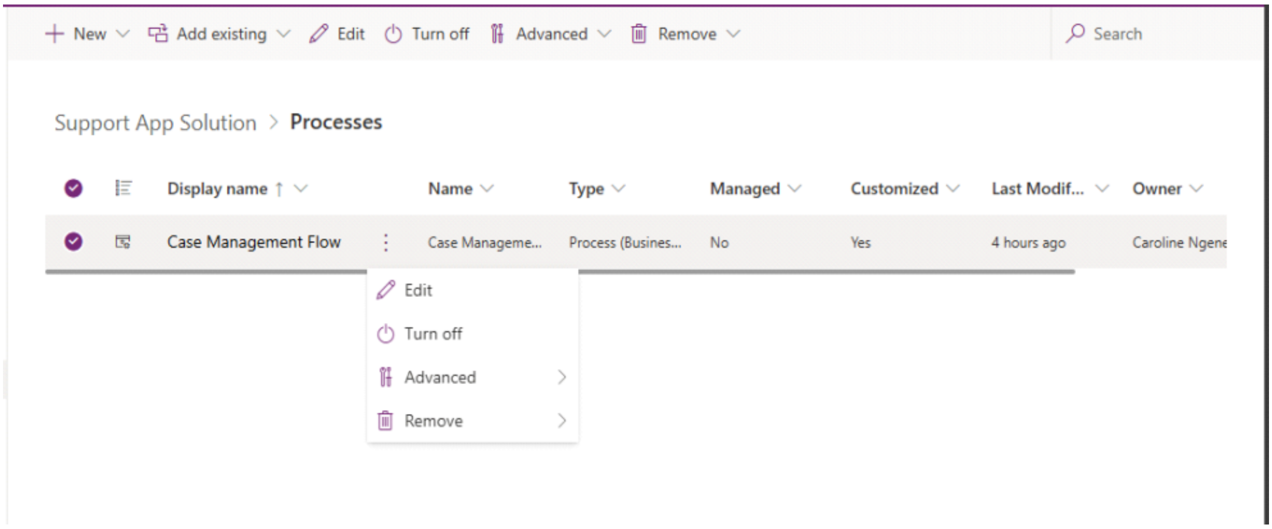


- Add the **Display Name** (e.g., *Facilitation Case*).
- Add the **Table Name** (e.g., *Case Table*).
- Click **Create**.



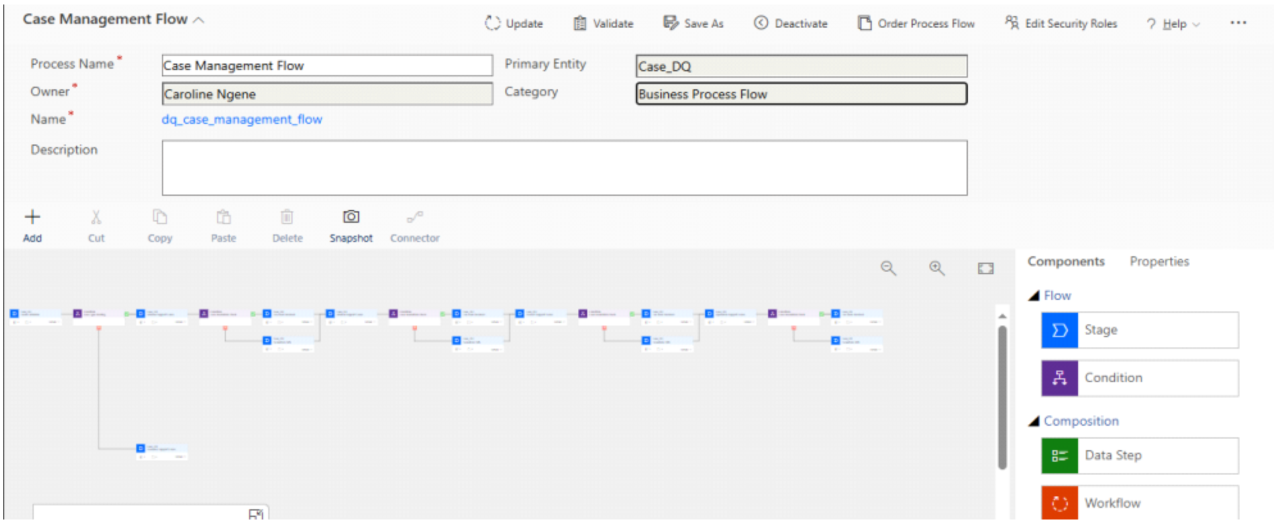
4. Editing the Process Flow

- Click on the three dotes on the process name
- You can:
  - Edit the flow
  - Turn on and off
  - Find advanced settings
  - Remove from the solution or Environment all together



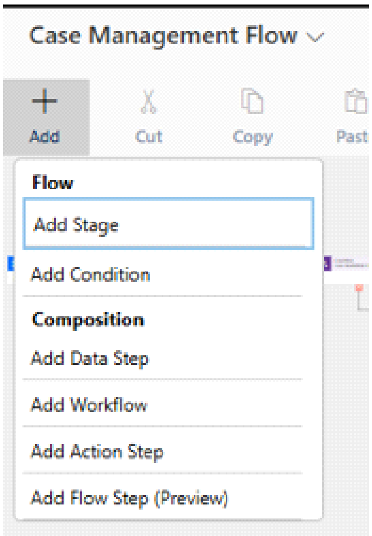
5. Open the process flow for configuration

- On the process name drop down you can edit the name and view more information about the flow
- Remember after renaming to click update and validate on the icons on top of the flow

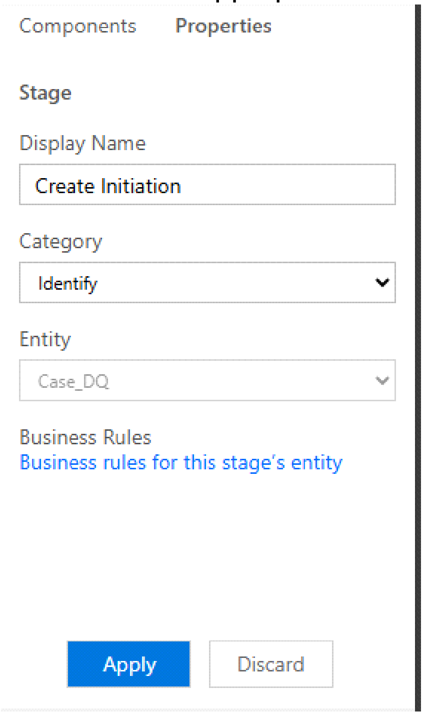


6. Creating a new Stage

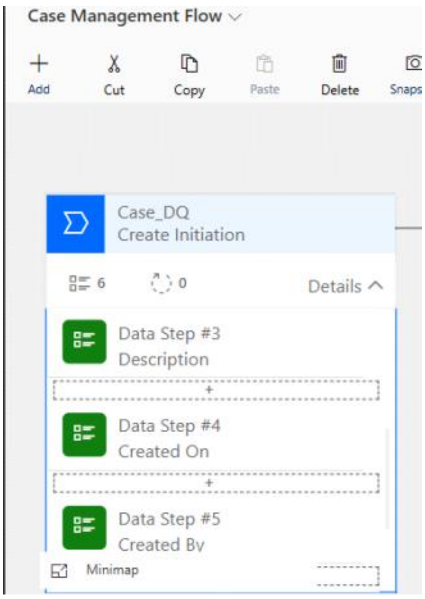
- Click on the Plus Icon and click on the add stage option on the flow



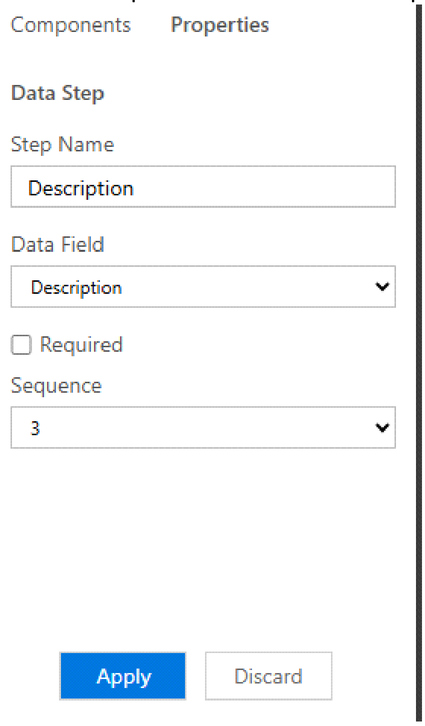
7. Fill in the appropriate Information on this component then click on apply



8. Each stage has one or several data steps as shown below:
- While on the data step click on the plus icon and select "Add Data Step"
- On the stage data stages plus option will appear click on one to add a data stage



- On the Component section add the appropriate details as per the data step then click apply

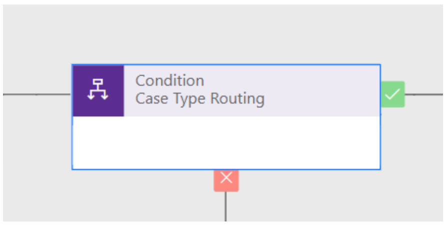


9. Creating a Condition In between the stages

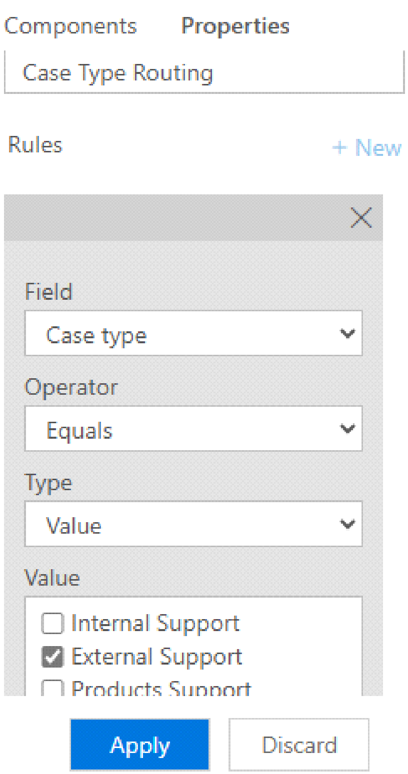
- Click on the plus icon and choose the "Add Condition" option
- The condition has yes (Green Tick) and X (Red) Routing
- Yes Path (Green Tick):

  This is the **True condition** path. When the condition is met (e.g., if the **Case Type** is **External Support**), the flow will follow the **Yes path**.
- No Path (Red Cross):

  This is the **False condition** path. If the condition is **not met** (e.g., if the **Case Type** is **Internal Support**, and you are checking for **External Support**), the flow will follow the **No path**.



10. On the Condition outing add the appropriate data then click on apply



11. Save and close
12. After configuration click on update icon, validate and **Activate** the flow