

A high-angle photograph of a business meeting. Five people in professional attire are gathered around a dark table, leaning over and working together to assemble a large green puzzle piece. Several white puzzle pieces are also visible on the table. The scene is brightly lit, and the overall atmosphere is one of collaborative teamwork.

# CRM Process Automation

The Microsoft Dynamics 365 logo, consisting of the Microsoft logo (four colored squares) followed by the text 'Microsoft | Dynamics 365' in a sans-serif font.

Microsoft | Dynamics 365

## Process Automation Made Easy

Well-defined Processes are crucial to provide a superior and consistent Customer Experience.

The **Netiks Process Automation** tool is designed to manage and monitor business processes intuitively.

Using the Netiks CRM Process Automation, you will no longer need to:

- Configure Workflows
- Configure Notifications
- Configure SLAs to monitor the team's work
- Write Code to create Action activities
- Write Code to create Documents' checklists
- Write Code to apply Multi-Level Approval on Actions and Documents.

The **Netiks CRM Process Automation** is a horizontal solution that fits all industries. It gives the Microsoft Dynamics CRM Admin the possibility to build a process with Stages, Actions, Documents and Notifications related to any entity in CRM.





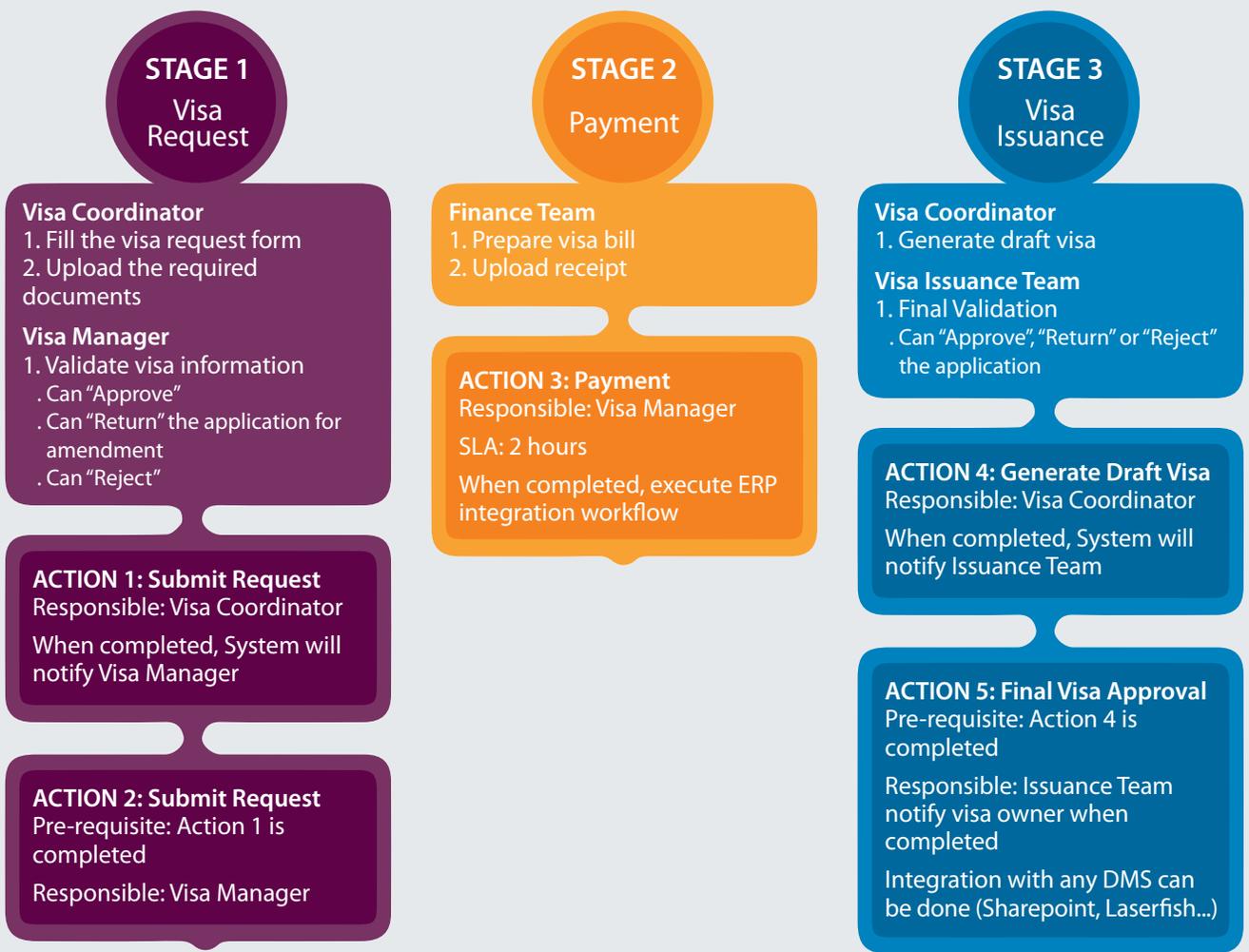
In the below example, we will illustrate the way the **Netiks Process Automation** serves an Embassy to process visas in a consistent way:

In order for a citizen to apply for a visa, you need to define the required documents.

After the citizen submits the application on a portal, a team of officers with the proper authority defined in the tool, checks the request and validates the documents, within a timeframe (SLA configured to escalate or route the case).

Once validated the application goes to the visa coordinator who generates the draft visa and sends it to the Visa Issuer who approves the final visa or can return it to the coordinator for amendments.

The Process Automation tool defines the documents required and the successive stages with the required actions within each stage. SLAs and notifications are defined for each stage without the need to write code.



The success of today's organizations depends on quick actions taken by the right resource at the right time. It is important for organizations to define automated processes and to rely on notifications and actions to be triggered at the right time to control the good execution of processes.

The **Netiks CRM Process Automation** solution will provide you with a fully-fledged solution to better control business processes:

- 01 Define advanced business processes
  - a. Define processes against any entity in the system
  - b. Define multiple processes related to the same entity
  - c. Ability to clone any defined process to save configuration time
- 02 Define the related Stages for each process
  - a. Assign/Share entity record with any team(s) or user(s)
  - b. Define required actions from team(s) or user(s)
  - c. Define a workflow to be run after an action is performed
  - d. Define required documents from team(s) or user(s)
  - e. Set SLAs for closing a required Action/Document
  - f. Define multi-level approvals
- 03 Define dynamic JavaScript rules to be applied on fields and forms within each stage
  - a. Allow to set the hidden/visible tabs
  - b. Allow to set the hidden/visible sections
  - c. Allow to set the hidden/visible fields
  - d. Allow to set the required/optional/recommended fields
- 04 Configure notifications (before and after the action) and assign email templates for notifications.
- 05 Monitor the SLA KPIs through interactive dashboards.

## 01 Process Configuration

The screenshot shows the Microsoft Dynamics CRM interface for configuring a process. The breadcrumb trail is: Microsoft Dynamics CRM > Process Automation > Process Conf... > Visa Applica... The main title is 'Visa Application' with a status indicator 'Draft'. The 'Configuration' section includes 'PROCESS DETAILS' with the following information:

Name *	Visa Application	Code *	300
Entity *	Case	Description	--
Trigger *	Case Creation		

The 'STAGES' section contains a table with the following data:

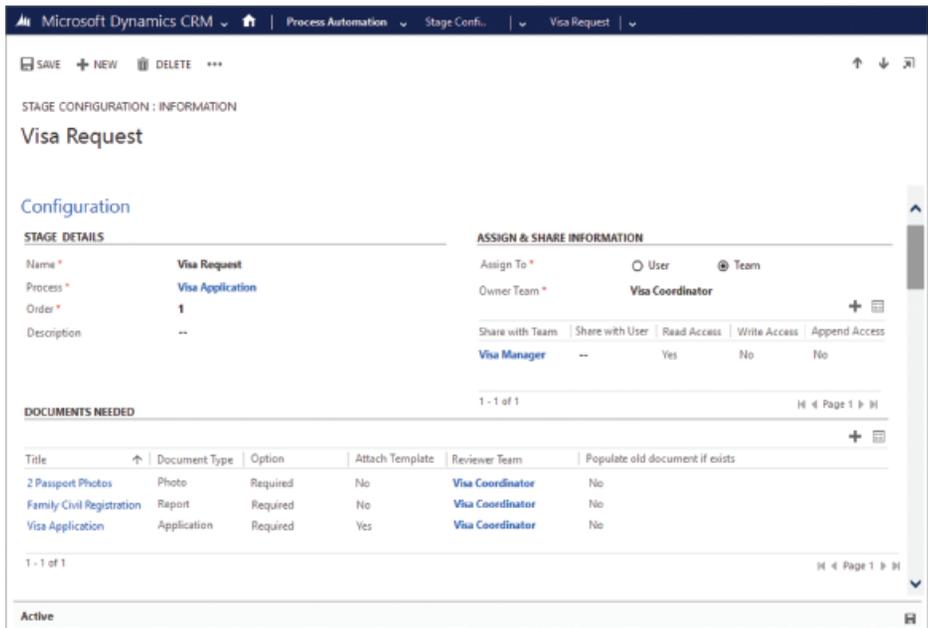
Order	Name	Assign To	Share With Team 1
1	Visa Request	Visa Coordinator	Visa Manager
2	Payment	Finance Team	
3	Visa Issuance	Visa Coordinator	Visa Issuance Team

At the bottom, the status is 'Active'.

### Features

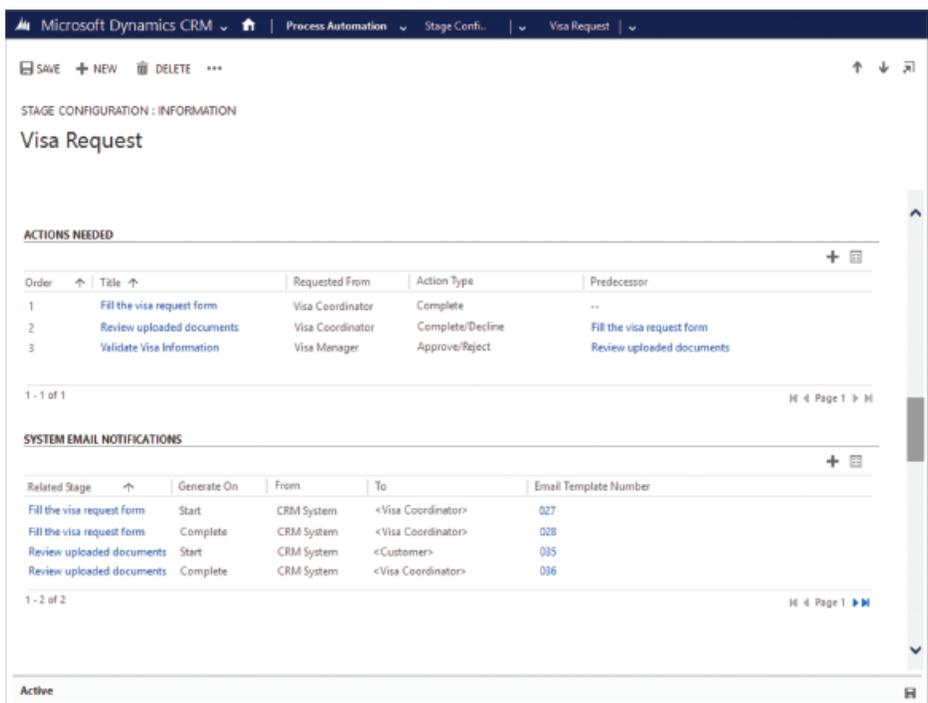
- Set Process Trigger (e.g. Case creation workflow)
- Set Stages required to finish the process (e.g. Visa Request, Payment, Visa Issuance)
- Ability to clone any process configuration record.

## 02 Stage Configuration



### Features

- Set Stage Order
- Set Assignments and Sharing rules (e.g.: Assign case to Visa Coordinator, and Share it with Visa Manager)
- Configure Documents needed within the stage (e.g.: Family Civil Registration, etc.)



- Configure Actions needed within the stage
- Configure Notifications and when they should be generated along with their email template.

Microsoft Dynamics CRM | Process Automation | Stage Config... | Visa Request

SAVE + NEW DELETE ...

STAGE CONFIGURATION : INFORMATION

## Visa Request

Entity: Case

### SET FIELD BUSINESS REQUIREMENTS

Fields: Customer [OK]

Requirement Level = Required

Requirement Level = Recommended

Requirement Level = None

### SHOW/HIDE TABS, SECTIONS, AND FIELDS

Tabs: GENERAL [Sections: Details] [Fields: All] [OK]

Tabs to show: <GENERAL>; <INTERNAL NOTES>; <CASE DETAILS>

Tabs to hide: <SLA DETAILS>

Sections to show: <Information>; <Notes>; <Details>

Sections to hide: <None>

Fields to show: <All>

Fields to hide: <None>

Active

## Features

- Define JavaScript rules to be applied on the form within the stage.

## 03 Entity Record after applying the Netiks CRM Process Automation tool

**Case Information**

Stage: Visa Request | Status: In Progress | Owner: Visa Coordinator

1 Visa Request | 2 Payment | 3 Visa Issuance

**Case Information**

**GENERAL INFORMATION**

Case Number: CAS0078  
 Title: Visa Application - CAS0078  
 Process: Visa Application  
 Customer: Salam Jawhar  
 Channel: Phone Call  
 Comments: --

**ACTIONS NEEDED**

Action ID	Title	Owner	Status	Predecessor
ACT - 1265	Fill the visa request form	Visa Coordinator	Pending	--
ACT - 1266	Review uploaded documents	Visa Coordinator	Pending	ACT - 1265
ACT - 1267	Validate Visa Information	Visa Manager	Pending	ACT - 1265

**Case Details**

**ADDITIONAL INFORMATION**

Created On: 08/10/2016 08:30 am  
 Created By: Ramzi Ezzedine  
 Modified On: 11/11/2016 03:30 pm  
 Modified By: Ramzi Ezzedine

**INTERNAL NOTES**

POSTS ACTIVITIES NOTES

Enter a note

No Notes found.

### Features

- Visual Header that shows all stages and highlights the current stage
- Automatic creation of Actions' entity relationships in CRM backend
- Creation of required Actions within the stage as per the configuration

**Documents**

**RELATED DOCUMENTS**

Document Name	Document Type	Status	Option	Owner	Started On	Closed On
2 Passport Photos	Photo	Accepted	Required	Visa Coordinator	15/10/2016 09:30 am	01/11/2016 10:13 am
Family Civil Registration	Report	Accepted	Required	Visa Coordinator	16/10/2016 01:24	01/11/2016 11:00 am
Visa Application	Application	Submitted	Required	Visa Coordinator	16/10/2016 01:24	01/11/2016 02:00 pm

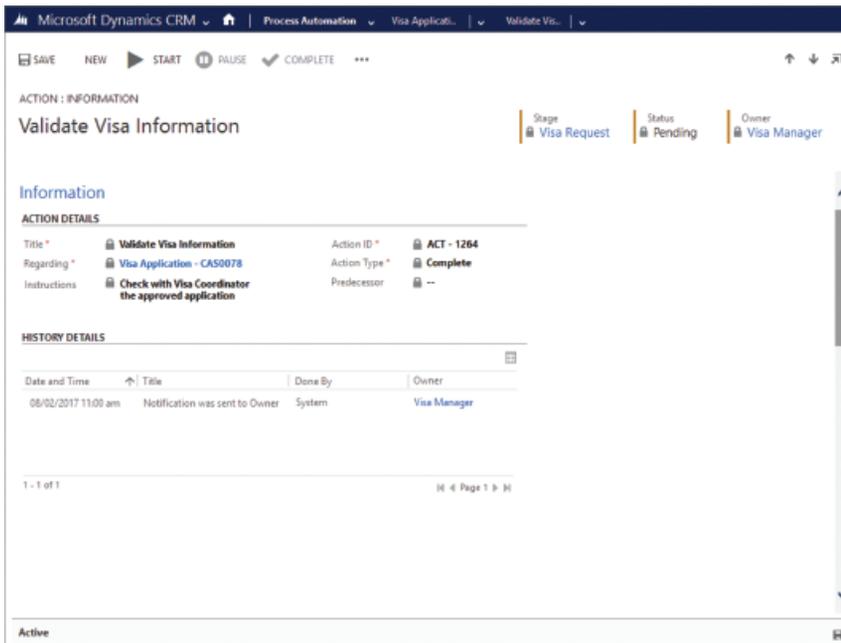
**Notifications**

**RELATED EMAIL NOTIFICATIONS**

Subject	From	To	Status	Created On
Fill the visa request form ACT-1263	CRM System	Visa Coordinator	Sent	08/10/2016 08:31 am
Visa request form was filled on-time	CRM System	Visa Coordinator	Sent	09/10/2016 09:43 am
Review documents ACT-1265	CRM System	Salam Jawhar	Sent	11/10/2016 10:56 am
Waiting Manager's Approval ACT-1265	CRM System	Visa Manager	Sent	10/11/2016 08:30 am

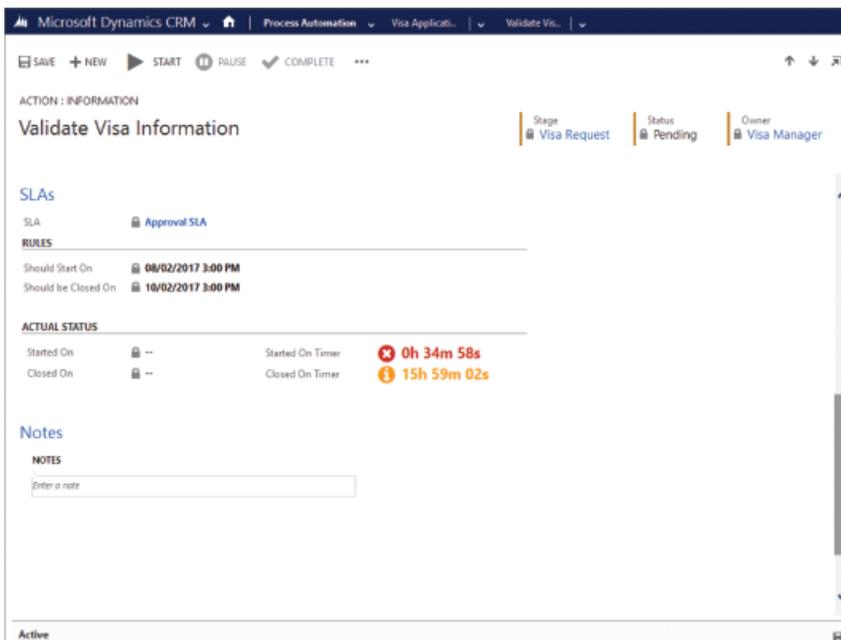
- Automatic creation of Documents' entity relationships in CRM backend
- Creation of required Documents within the stage as per the configuration.

## 04 Action Record after applying the Netiks CRM Process Automation tool



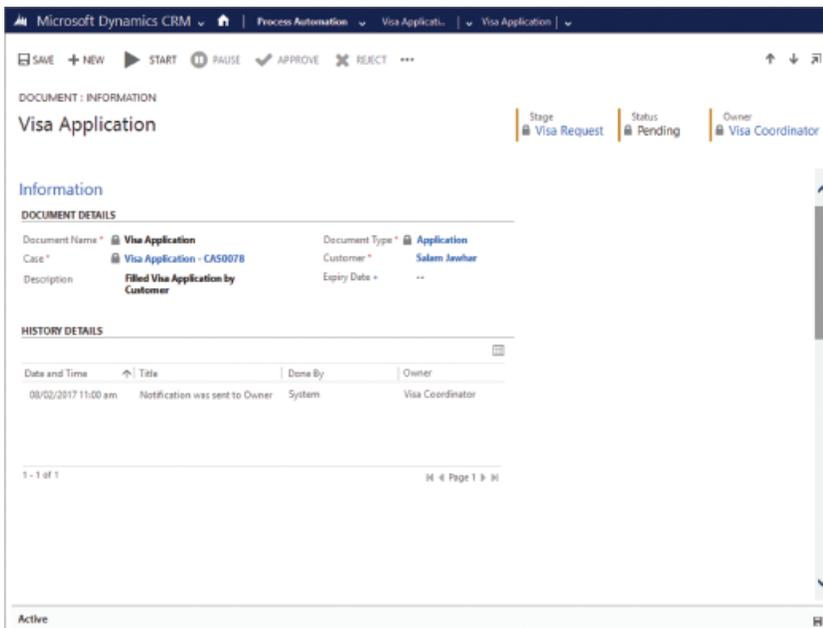
### Features

- Automatic assignment and sharing based on the configuration
- Showing ribbon button as per the Action Type configuration
- Tracking History on the actions done on the record



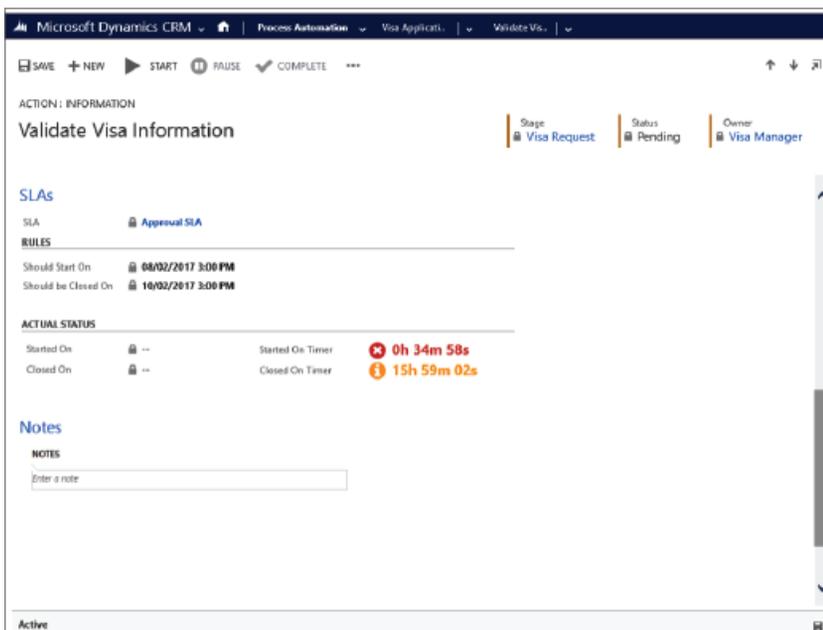
- Automatic configuration of SLAs record based on the Action settings
- Run workflow based on Action configuration.

## 05 Document Record after applying the Netiks CRM Process Automation tool



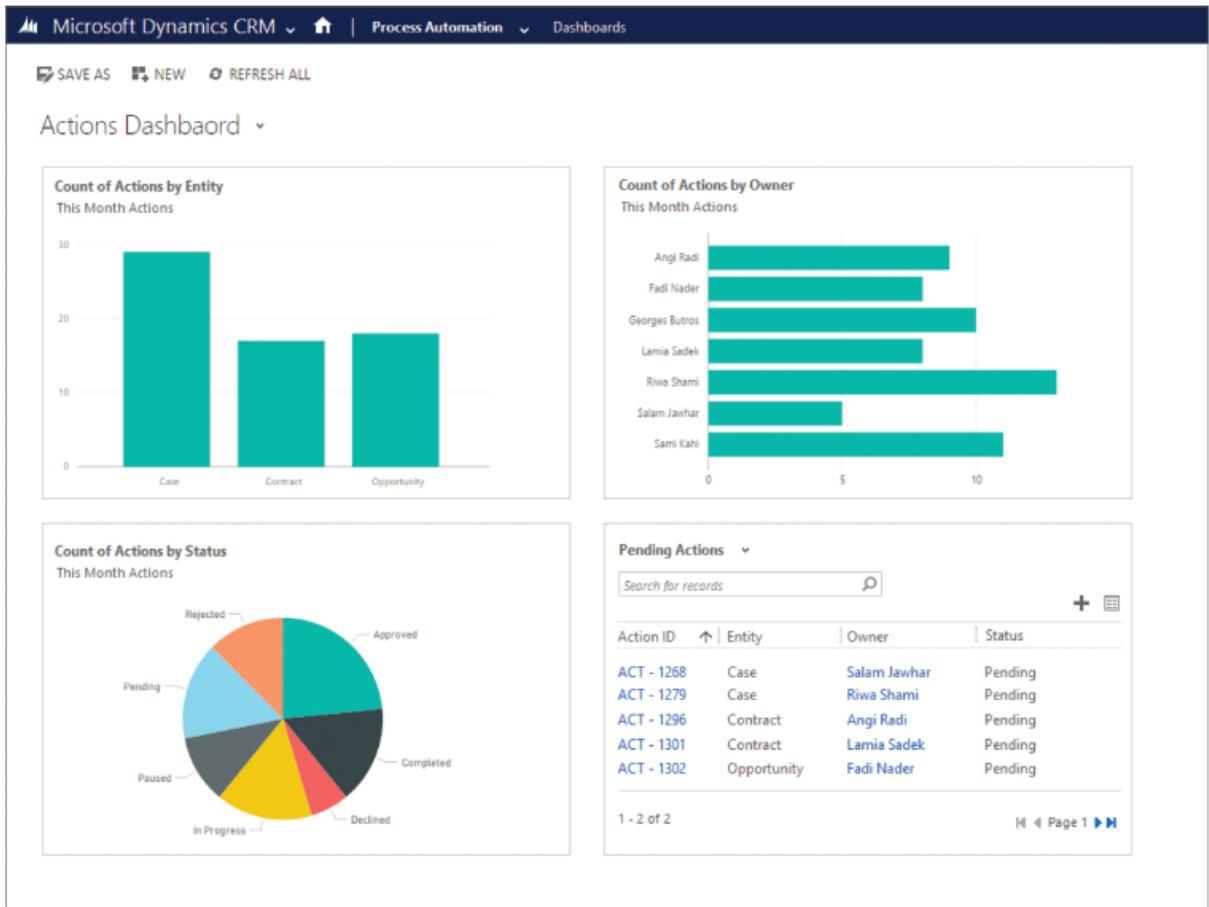
### Features

- Automatic assignment and sharing based on the configuration
- Approvals on documents
- Tracking History on the actions done on the record



- Automatic configuration of SLAs record based on the Document settings
- Show attachment details.

## 06 Summary Dashboard



### Features

- Summary Dashboard to identify pending actions and monitor KPIs.



Innovate. Deliver. Delight.

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