CRM Process Automation

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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.

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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.

STAGE 1
Visa Request

Visa Coordinator
1. Fill the visa request form
2. Upload the required documents

Visa Manager
1. Validate visa information
   . Can "Approve"
   . Can "Return" the application for amendment
   . Can "Reject"

ACTION 1: Submit Request
Responsible: Visa Coordinator

When completed, System will notify Visa Manager

ACTION 2: Submit Request
Pre-requisite: Action 1 is completed

Responsible: Visa Manager

STAGE 2
Payment

Finance Team
1. Prepare visa bill
2. Upload receipt

ACTION 3: Payment
Responsible: Visa Manager

SLA: 2 hours

When completed, execute ERP integration workflow

STAGE 3
Visa Issuance

Visa Coordinator
1. Generate draft visa

Visa Issuance Team
1. Final Validation
   . Can "Approve", "Return" or "Reject" the application

ACTION 4: Generate Draft Visa
Responsible: Visa Coordinator

When completed, System will notify Issuance Team

ACTION 5: Final Visa Approval
Pre-requisite: Action 4 is completed

Responsible: Issuance Team notify visa owner when completed

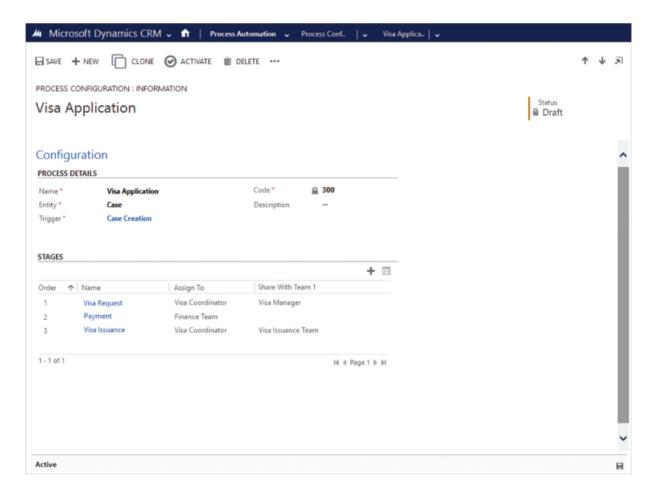Integration with any DMS can be done (Sharepoint, Laserfish...)

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.

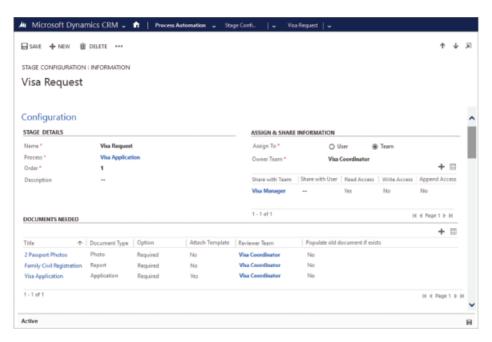## 05 Monitor the SLA KPIs through interactive dashboards.

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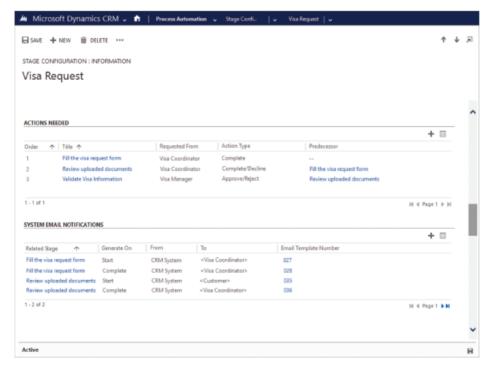
01 Process Configuration

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.
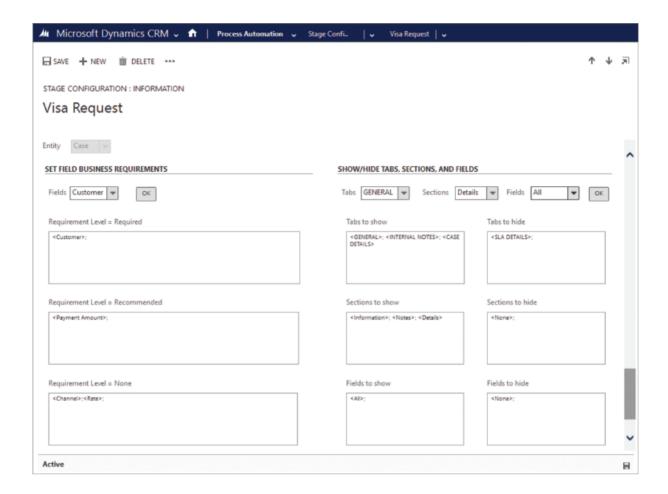
02 Stage Configuration

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.
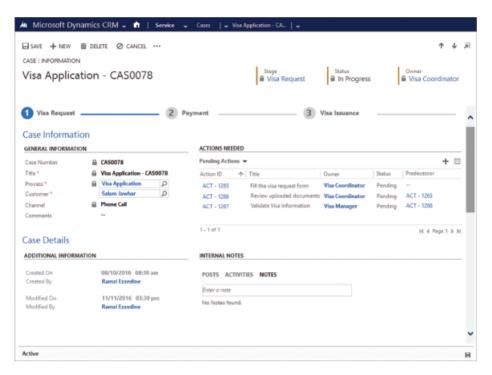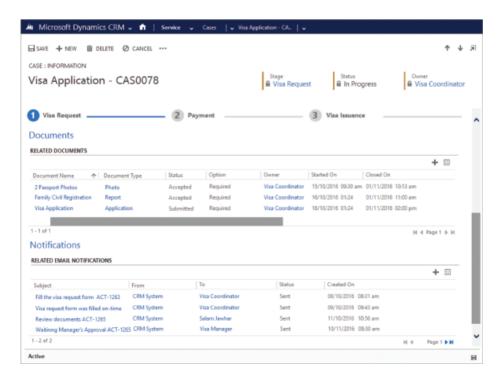
Features

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

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03 Entity Record after applying the Netiks CRM Process Automation tool
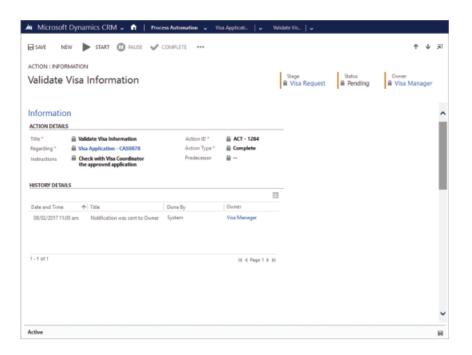

Features

- Visual Header that shows all stages and highlights the current stage

- Automatic creation of Actions' entity relationships in CRM backend

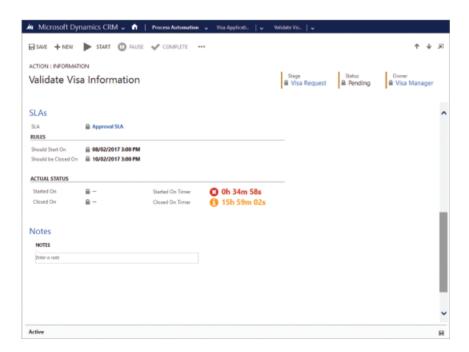- Creation of required Actions within the stage as per the configuration

- 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
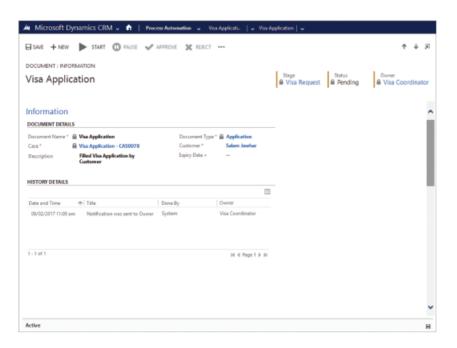

Features

- ■ Automatic assignment and sharing based on the configuration

- ■ Showing ribbon button as per the Action Type configuration

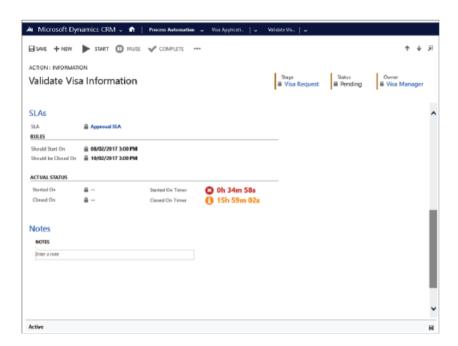- ■ Tracking History on the actions done on the record

- ■ 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
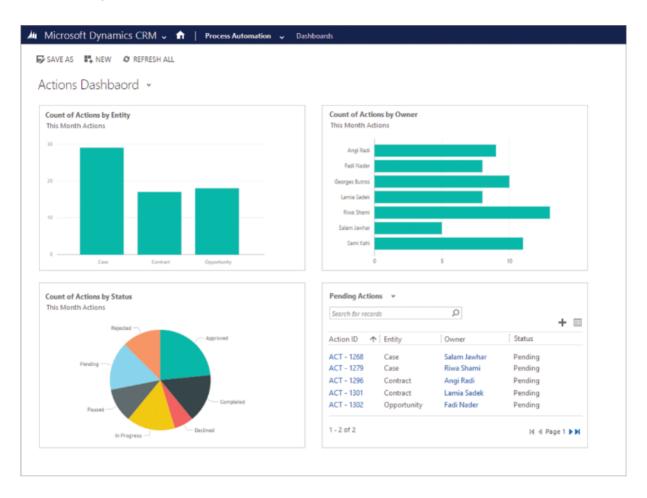

Features

- 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.

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