Microsoft Dynamics 365

TechTalk Series: Business Process Catalog and Guidance

Part 4: Authoring Business Processes (DTV029EXT)

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TechTalk Series

- Part 1: Introduction to the Dynamics 365 Guidance Hub – November 30th
- Part 2: Introduction to Business Processes – December 14th
- Part 3: Using the Business Process Catalog to Manage Project Scope and Estimation – January 11th
- Part 4: Authoring Business Processes – January 18th ←
- Part 5: Authoring Business Process Patterns – January 25th

Agenda

- Identifying business processes
- Structure of a business process
- Building the implementation guidance
- Graphics for a business process
- Resources for business processes
- Next steps for business processes
- Tagging for business processes
- Submitting a business processes article

Identifying business processes

What is a business process?

- A set of tasks that is completed to achieve a specific objective
- 800+ business processes already defined
- Goal to get to 75% coverage by July 2024
- Full list in the business process catalog

https://aka.ms/businessprocesscatalog

What is a business process for?

Who

- New consultants/BA's learning about business applications
- Existing consultants/BA's looking for best practices

Level 300

- Specific set of tasks in a sequence for achieving the objective
- Define when each step is done in the implementation
- Define how many are needed

Purpose

- Provide considerations and best practices for implementing
- Provide technical information for implementing
- Link to product documentation to achieve the tasks

Business processes versus steps or patterns examples

Business processes

- Create a sales order
- Hire employees
- Create a purchase order
- Create a customer
- Create a vendor

Steps or patterns

- Add lines to a sales order = step
- Create a sales order with misc. charges = pattern or a decision + step
- Create a purchase order line = step
- Create purchase order lines by using product categories = pattern
- Create a patient account = industry specific pattern

Getting started

1. Download the catalog
2. Check the GitHub Issues list
3. Create an Issue request and wait for approval
4. Make a copy of the template
5. Author your document and submit

Demo: Requesting, Authoring, and Submitting Articles

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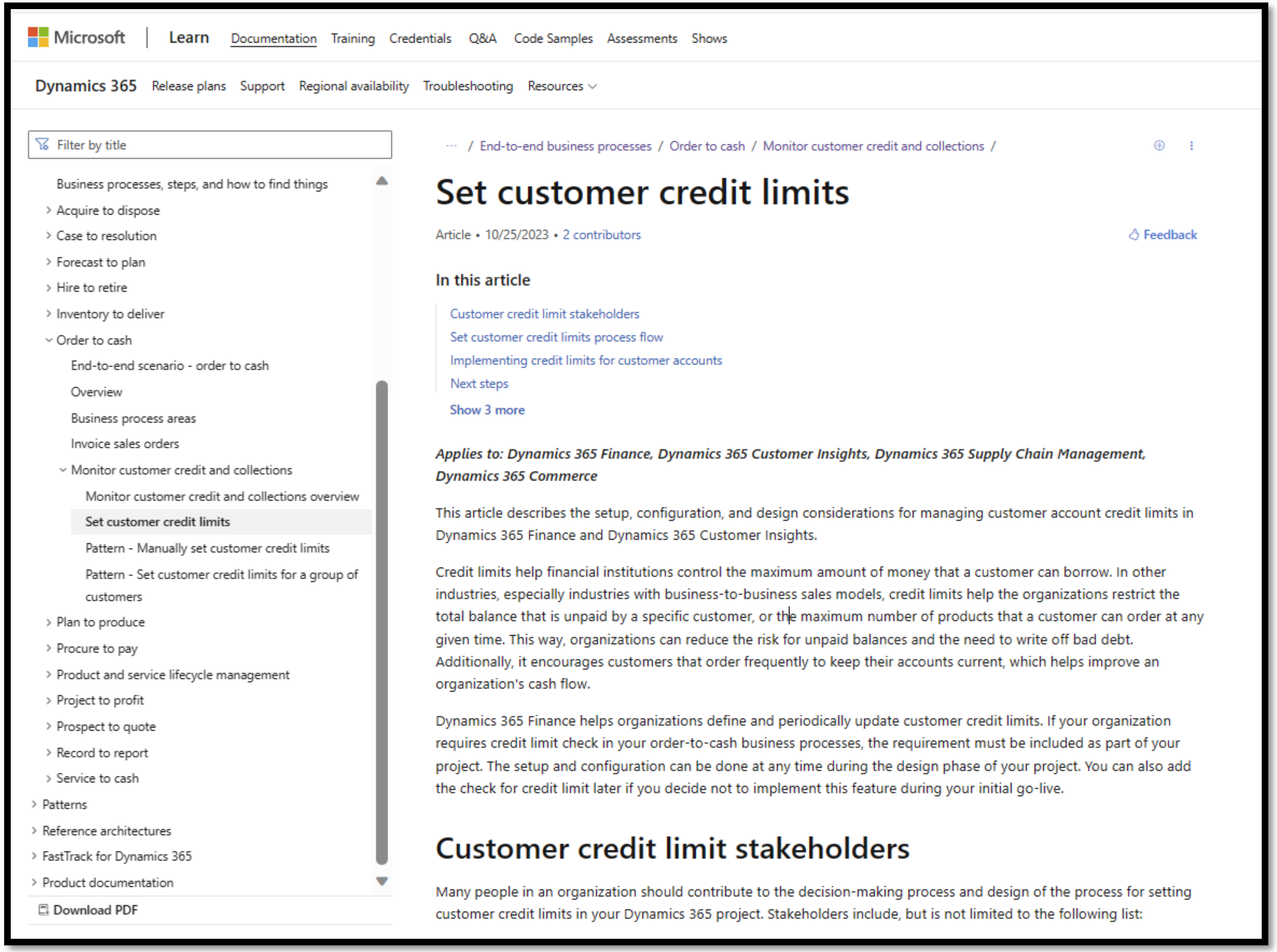
Structure of a business process article

Rachel Profitt

Anatomy of the business process article

- Introduction
- Stakeholders
- Process flow
- Implementing (steps)
- Next steps
- Related patterns
- Related resources
- Contributors


Microsoft | Learn Documentation Training Credentials Q&A Code Samples Assessments Shows

Dynamics 365 Release plans Support Regional availability Troubleshooting Resources

Filter by title

Business processes, steps, and how to find things
Acquire to dispose
Case to resolution
Forecast to plan
Hire to retire
Inventory to deliver
Order to cash
End-to-end scenario - order to cash
Overview
Business process areas
Invoice sales orders
Monitor customer credit and collections
Monitor customer credit and collections overview
Set customer credit limits
Pattern - Manually set customer credit limits
Pattern - Set customer credit limits for a group of customers
Plan to produce
Procure to pay
Product and service lifecycle management
Project to profit
Prospect to quote
Record to report
Service to cash
Patterns
Reference architectures
FastTrack for Dynamics 365
Product documentation
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… / End-to-end business processes / Order to cash / Monitor customer credit and collections /

Set customer credit limits

Article • 10/25/2023 • 2 contributors Feedback

In this article

Customer credit limit stakeholders
Set customer credit limits process flow
Implementing credit limits for customer accounts
Next steps
Show 3 more

Applies to: Dynamics 365 Finance, Dynamics 365 Customer Insights, Dynamics 365 Supply Chain Management, Dynamics 365 Commerce

This article describes the setup, configuration, and design considerations for managing customer account credit limits in Dynamics 365 Finance and Dynamics 365 Customer Insights.

Credit limits help financial institutions control the maximum amount of money that a customer can borrow. In other industries, especially industries with business-to-business sales models, credit limits help the organizations restrict the total balance that is unpaid by a specific customer, or the maximum number of products that a customer can order at any given time. This way, organizations can reduce the risk for unpaid balances and the need to write off bad debt. Additionally, it encourages customers that order frequently to keep their accounts current, which helps improve an organization's cash flow.

Dynamics 365 Finance helps organizations define and periodically update customer credit limits. If your organization requires credit limit check in your order-to-cash business processes, the requirement must be included as part of your project. The setup and configuration can be done at any time during the design phase of your project. You can also add the check for credit limit later if you decide not to implement this feature during your initial go-live.

Customer credit limit stakeholders

Many people in an organization should contribute to the decision-making process and design of the process for setting customer credit limits in your Dynamics 365 project. Stakeholders include, but is not limited to the following list:

Get started with the template

1. Name the file according to the business process with **no spaces, use nouns and verbs, use dashes between words**, **all lower cases**.
2. Save in the appropriate **end-to-end folder**.
3. Instructions are in Red with brackets []. Delete instructions when complete.
4. Text to be replaced/adjusted is highlighted yellow.
5. **Do not change** the plain white text.

[Name the file according to the business process. The name should match the name of the business process in column C of the business process catalog exactly. When you save the file, save it with all lower cases, and use dashes instead of space.]

[Delete all red text instructions before submitting. Do not replace white text. Yellow highlighted text should be replaced. After you replace the yellow highlighted text change it to be no highlight. The document should not include highlights when submitting. We suggest doing a find and replace on the "[Business process name]" with your actual business process name.]

[Business process name]

[Delete the product names that do not apply. Only use Dynamics 365 if the article applies to all Dynamics 365 products, and in that case, delete all the other product names.]

[Do not change the names of products, add new products, or reorder the products.]

[Copy all the same product names to the Tags / Products section at the end of the article.]

Applies to: ***Dynamics 365 Business Central, Dynamics 365 Commerce, Dynamics 365 Customer Insights, Dynamics 365 Customer Service, Dynamics 365 Customer Service Insights, Dynamics 365 Customer Voice, Dynamics 365 Field Service, Dynamics 365 Finance, Dynamics 365 Fraud Protection, Dynamics 365 Guides, Dynamics 365 Human Resources, Dynamics 365 Intelligent Order Management, Dynamics 365 Marketing, Dynamics 365 Project Operations, Dynamics 365 Remote Assist, Dynamics 365 Sales, Dynamics 365 Supply Chain Management, Microsoft Supply Chain Center***

This article describes _Describe the background of the article and what will be included in the article._

Text:

- Describe the purpose and importance of the business process.
- Explain when this business process should be defined in the overall implementation.
- Describe the key stakeholders required in defining the business process are.

[Business process name] process flow

The following diagram illustrates the business process.

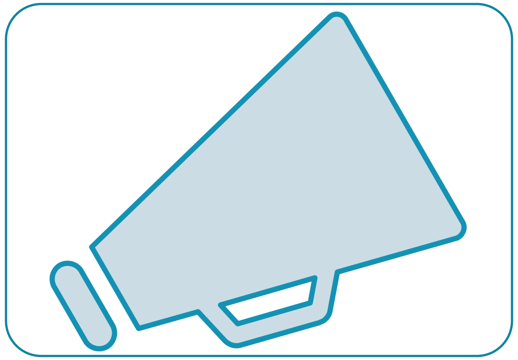
[Create graphics in the PPT template. When you are finished creating the graphic, right-click (for SmartArt or press Ctrl+A for process flows) and then select Save as picture. Save the graphic with a file name with the name of your business process flow and the word "flow" at the end with dashes instead of spaces. Instert the .JPG or PNG file into the Word document below.]

[GRAPHIC GOES HERE]

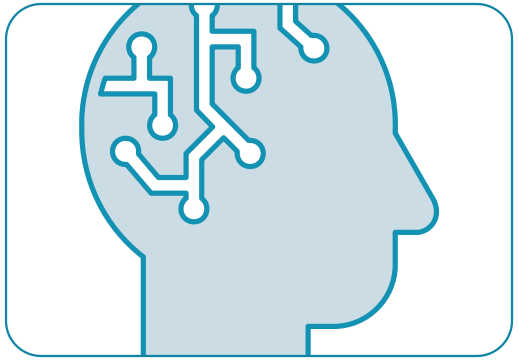
NAME OF GRAPHIC GOES HERE

1. Numbered list of text goes here to describe the steps in the process flow diagram. Be sure to include descriptions for any parallel branches.
2. Step
3. Step
4. Step

Writing a great introduction

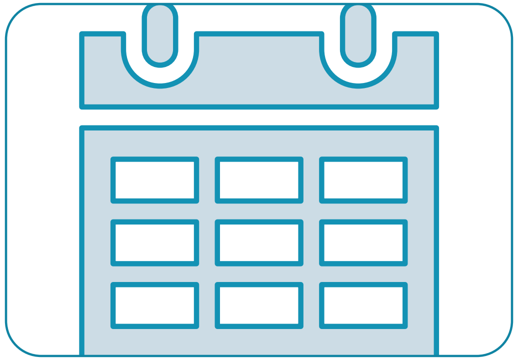


Announcement – What is this about?



For consultants and business analysts, introduce new terminology and concepts

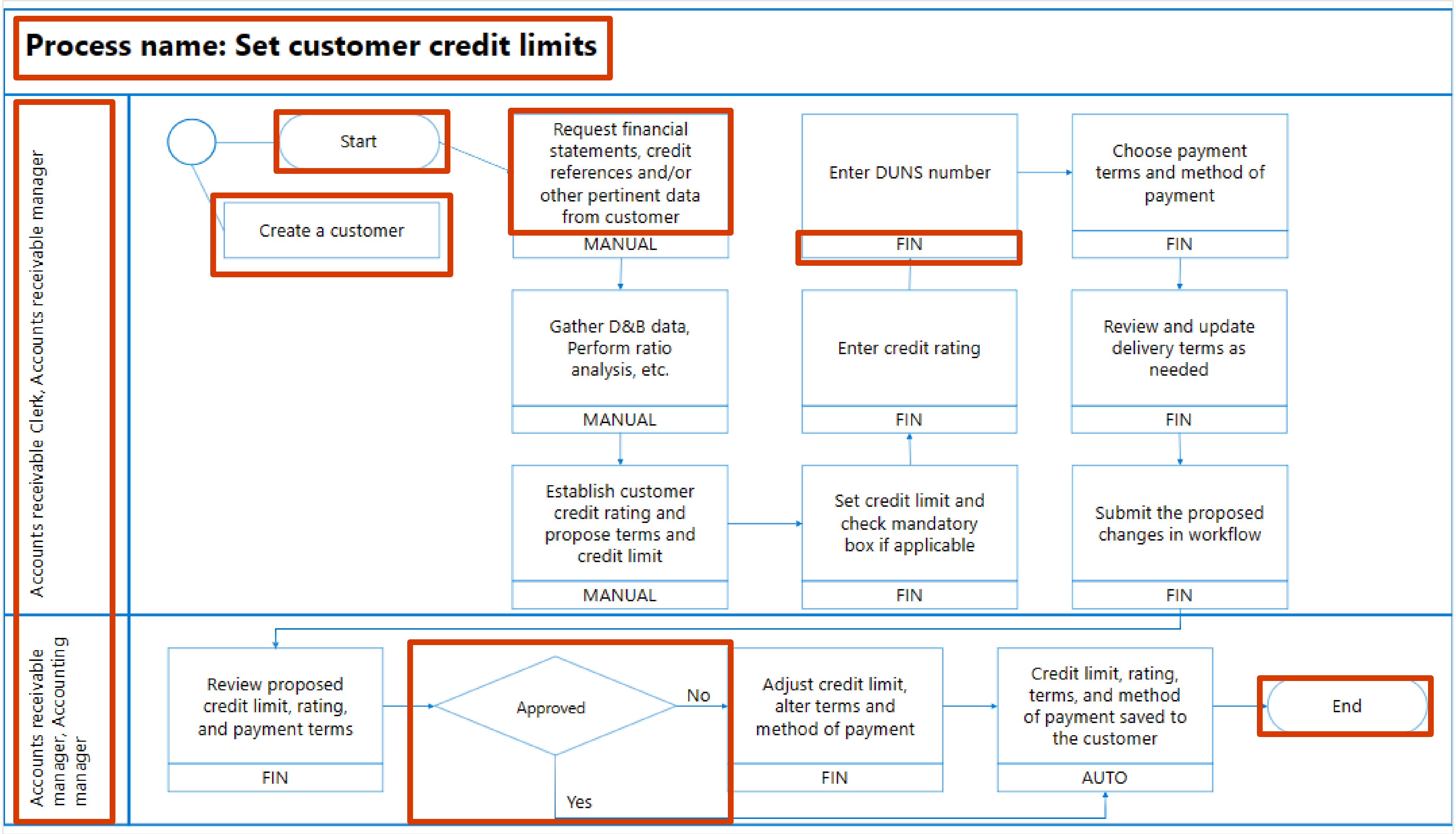
Why the business process is important, and what is the impact?



When during an implementation? Consider if there is flexibility.

Graphics for business processes

What goes into the process flow



Tips for building the process flow

- Start with any setup that is required before you do the “thing”
- Test your process with the out-of-the-box security roles
- Consider any pre-requisites
- Document the logical process steps/screens that are used
- When you have parallel steps, consider horizontal layouts
- Connect the arrows between each step
- Consider any key decision points for branching

What the process steps are and are not

Are Not

- Product documentation
- A list of each click to perform a task

Are

- Forms used in Dynamics 365
- Steps completed in LCS or PPAC
- Steps completed in Azure
- Steps completed in other Microsoft products
- Steps that are done outside the system
- Steps that are done in a third-party system
- Steps that are done manually

Describing the graphic

You are describing the graphic for someone who is blind

Every object and every arrow must be included

The software or manual/auto are in parenthesis after the step

The steps are a numbered list

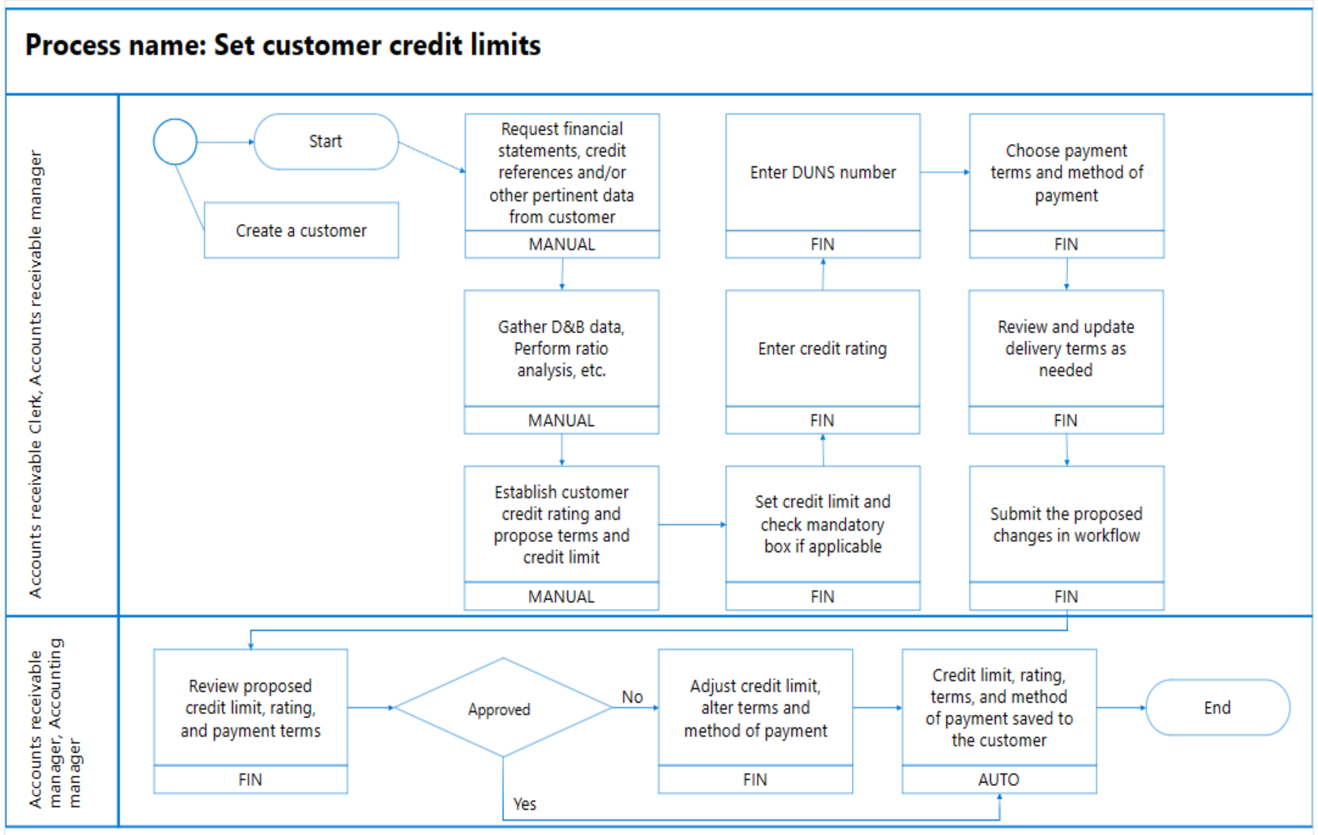
Step one is always start

Try to describe the happy path first

Parallel branches are described as text below a step

Refer to the objects with their number or letter from the list

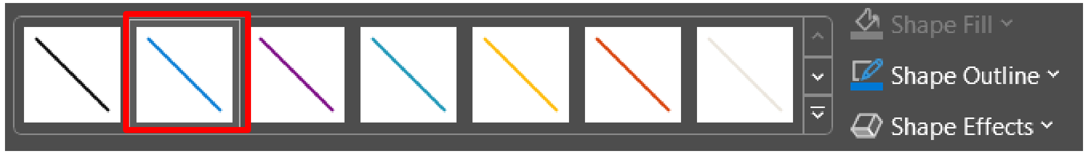
Example of graphic and text



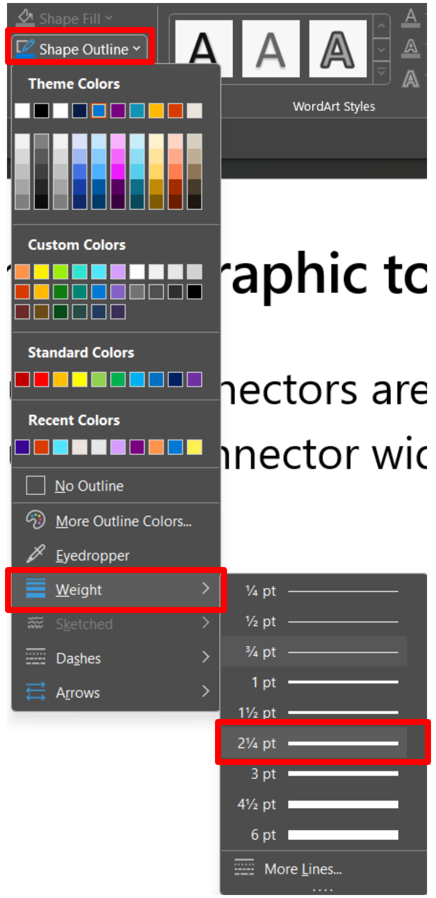
The process flow diagram includes the following steps.

1. Create a customer (a prerequisite business process before you start).
2. Start
3. Request financial statements, credit references, and/or other pertinent data from customer (manual step).
4. Gather Dun & Bradstreet data, perform ratio analysis, and so on (manual step).
5. Establish a customer credit rating, and propose terms and credit limit (manual step).
6. Set credit limit and check mandatory box if applicable in Finance.
7. Enter credit ratings in Finance.
8. Optionally, add the DUNS number in Finance.
9. Choose the payment terms and the method of payment in Finance.
10. Review and update relevant delivery terms as needed in Finance.
11. Submit the proposed changes in workflow in Finance.
12. Review the proposed credit limit, rating, and payment terms in Finance.
13. Approval
    a) If not approved, adjust the credit limit, alter the terms and the method of payment
    b) If approved, go to step 14.
14. The credit limit, rating, terms, and method of payment is automatically saved to the customer record
15. End
    a) Steps 3-9 are in one swim lane that's dedicated to an Accounts receivable clerk or Accounts receivable manager.
    b) Steps 10-14 are in another swim lane that's dedicated to an Accounts receivable manager or Accounting manager.

Adding the graphic to the document



1. Ensure all connectors are blue.
2. Ensure the connector width is 2 ¼ pt.
3. Press **Ctrl+A** to select all the objects on the slide.
4. **Right-click** and select **Save as Picture**.
5. Save the graphic as an SVG file.
6. Name the file [name]-process-flow
7. Open the Word document.
8. Click **Insert > Pictures** and browse to the correct file.



Keep graphics simple when possible

Minimize squares and lines

Use notes to describe an alternative path

Will it be in Level 3 or 4?

Is it clicks in a process

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Building the implementation guidance

Components of the implementing section

- Introduction
- Tip to use the glossary
- List of potential solutions
  - When to use this option
- Table for each solution
  - Process step
  - Process stage
  - Process modifier
  - App: navigation and entity

Implementing credit limits for customer accounts

You can define rules in Dynamics 365 Finance to automatically place orders on hold when the criteria are met. When an order is on a credit hold, the order cannot be processed further until the order is released from the hold. Dynamics 365 includes multiple ways to put an order on hold the following tables and sections describe the various configurations and operational processes that are part of setting customer credit limits in Dynamics 365 applications.

Tip

A variety of terminology and concepts are used throughout this article to describe the business process. For definitions and explanations of key terms and concepts, see **Glossary of terms in Dynamics 365 business processes**.

The following sections show the configurations available, and the sequence recommended for setting up the configurations from top to bottom. Learn more about the terms used in the table at Business processes, steps, and how to find things.

Basic credit limit checking

(Finance – Credit and collections management)

Use this option when you need to perform a basic credit limit check on Free text invoices, Project invoices, and Sales orders. This option allows you to select the level of warning or error and when the credit limit check will be performed.

Process step	Process stage	Process modifiers	App, navigation, and entity
Credit and collections parameters	Initialize; Base; Configuration	Gold; At least one	**FIN**: Credit and collections > Setup > Credit and collections parameters > Credit tab > Credit limit FastTab **DMF**: *CustomerParameters*
Establish customer terms of payment	Design; Fundamental; Configuration	Gold; At least one is required; Multiple are recommended	**FIN**: Accounts receivable > Payments setup > Payment days **DMF**: *PaymentTerm*
Establish customer methods of payment	Design; Fundamental; Configuration	Gold; At least one is required; Multiple are recommended	**FIN**: Accounts receivable > Payments setup > Methods of payment **DMF**: *CustomerPaymentMethod*
Payment days	Design; Optional; Configuration	Gold; Multiple are recommended	**FIN**: Accounts receivable > Payments setup > Payment days

Writing the introduction for the implementing section

- Describe which product(s)
- List names of specific feature(s)
- Include the standard tip box
- Do not change the details for "The following section(s)…"
- Refer to Business processes, steps, and how to find things for more details

The solution

- Include the product name and module or feature in parenthesis ()
- Include a sentence that describes when to use this option
- Include the table

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(Finance – Credit and collections management)

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Payment days	Design; Optional; Configuration	Gold; Multiple are recommended	**FIN**: Accounts receivable > Payments setup > Payment days

What are process steps?

- Sequential steps
- Top to bottom
- Hyperlink to the product documentation
- Avoid back and forth in the steps as much as possible
- If back and forth is required, include a Note below the table.
- You can use super script or *'s to indicate which note goes with each step when there is more than one note.

What are process stages?

Project phase	Configuration stage	Process type
• Strategize • Initialize • Develop • Prepare • Operate	• Base • Foundational • Optional	• Configuration • Operational

What are process modifiers?

What?

- Clarifies when and how
- One or more

Options

- Early
- Gold
- Continuous
- At least one
- Multiple are recommended

What’s the App, Navigation, and Entity column?

Application interfaces

- 2-4 Letters
- All CAPS
- No CE or FO

Navigation

- Start from main menu
- Use > between clicks

Entity

- DMF or DV
- Followed by colon “:”
- System name of entity/table
- If multiple use commas

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Next steps for business process

Why are next steps important?

- Logical sequence of events
- Implementing a specific business process
- Context for a new consultant or business decision maker
- What would be important to learn next?
- What would be critical to do next in the project?

How to write your next steps

1. Business processes within an area generally have a logical sequence
2. Use the business process area flow as your guide for the sequence
3. Write “(the article that you're currently reading)” after the one you’re adding
4. Create a hyperlink to the article for the step (if that article is already published)

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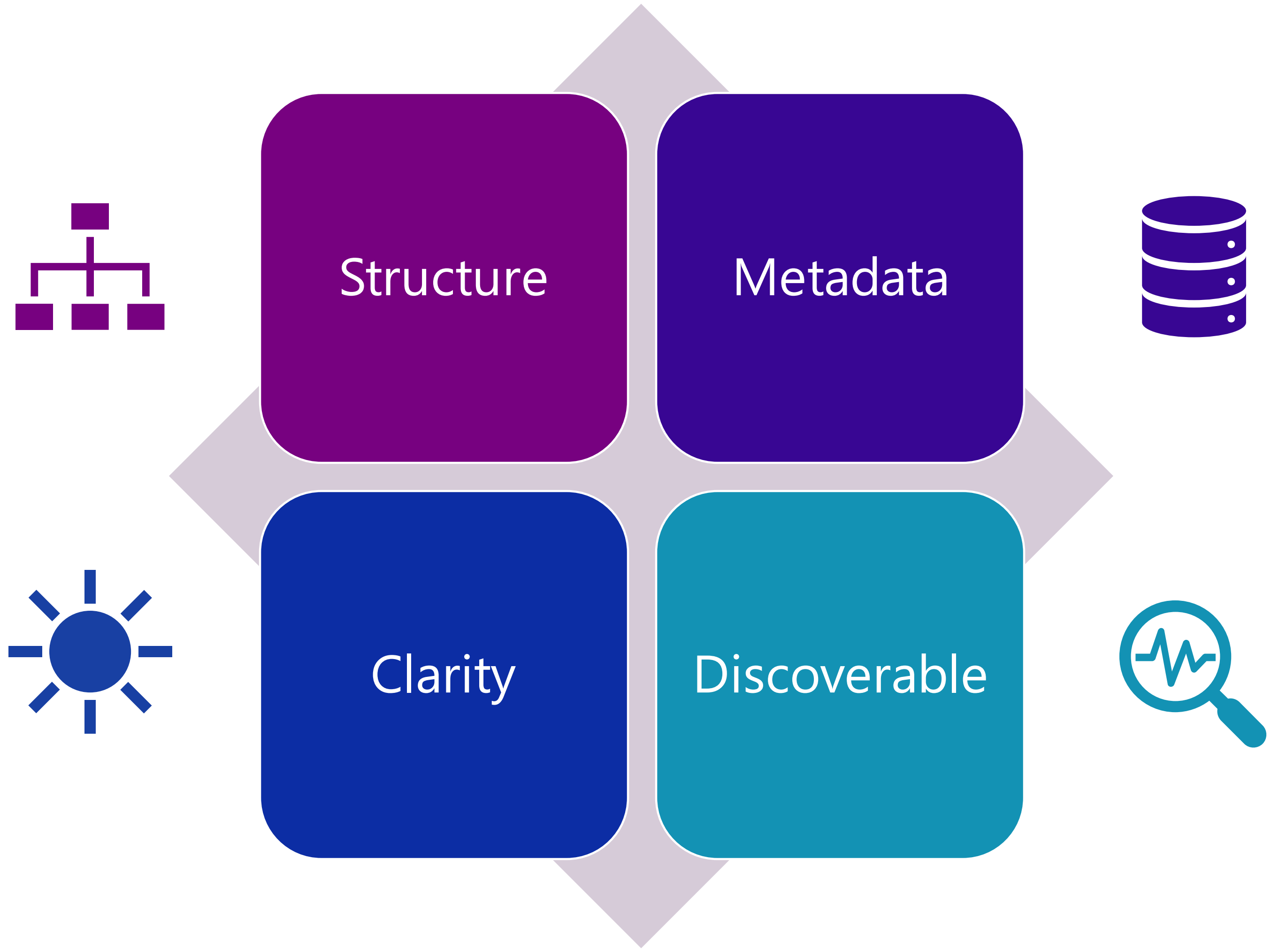
Tagging for business process areas

Why is tagging important



What are the tags we have identified?

Industries

Stakeholders

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Products

How to work with the tags

The full list of tags is in the template

Delete any tags that do not apply

When submitting your article mark the same check boxes that apply for each tag

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Resources for business process articles

Why are resources important?

- Resources are what make the business process documentation an “INDEX” to other documentation.

- Business process documentation is not product documentation

- Put yourself in the audience shoes…

- What else might you want to learn about?

Types of resources to include

- Specific TechTalk or TechTalk Series
- FastTrack Architect Community Call
- Specific product documentation – Overviews are typically helpful at the level 200
- Implementation guide chapter link
- Implementation toolkit link
- Learn courses or Microsoft Learn modules
- Certification or exam specific to the business process area
- GitHub samples
- Marketing related videos that highlight benefits you mention
- Conference videos with demos for features you mention in your benefits
- Blogs for specific features you mention in your benefits
- Other links as relevant

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Resources and recommendations

Additional resources

- https://aka.ms/oneguidance
- https://aka.ms/businessprocesscatalog
- https://learn.microsoft.com/en-us/dynamics365/guidance/business-processes/about-import-catalog-devops
- https://aka.ms/businessprocessflow
- https://aka.ms/businessprocescatalogrequests
- https://aka.ms/businessprocesscatalogfeedback
- https://learn.microsoft.com/en-us/dynamics365/get-started/contribute
- https://learn.microsoft.com/en-us/dynamics365/guidance/business-processes/about-steps-navigation

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QUESTIONS

Your feedback is important, please take a moment to complete a short survey about today's session

https://forms.office.com/r/A4Xnakwm4d

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria

Děkuji **Tak** Dank u Tänan Kiitos **Merci** Danke Ευχαριστώ A dank

Mahalo תודה. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Ačiū **Благодарам** ありがとうございました

谢谢 Баярлалаа **Dziękuję** Obrigado Mulţumesc **Спасибо** Ngiyabonga

Ďakujem Tack Nandri Kop khun **Teşekkür ederim** Дякую Хвала Diolch

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