USING MULTIPLE BUSINESS PROCESSES

Summary

Use multiple business processes to manage different sales, lead, support, and solution processes.

Categorize your opportunity stage, lead status, case status, and solution status picklist values into lists called Sales Processes, Lead Processes, Support Processes, or Solution Processes. Then, associate each business process with one or more record types and make that record type available to users based on their profile.

For example, your company may have three sales divisions: hardware, software, and consulting. The hardware and software divisions follow a 10-step sales process they call *Miller Heiman*. But consulting follows an 8-step sales process they call *Strategic Selling* so users of that division never use the *Prospecting* or *Perception Analysis* stages during the sales cycle. To manage these different sales processes, create two sales processes and include the *Prospecting* and *Perception Analysis* stages in only one of them. To set this up, the administrator can do the following:

1. **Manage master picklists**

   Define the complete list of opportunity *Stage* picklist values that you plan to use across the hardware, software, and consulting divisions.

2. **Create sales processes**

   Create two sales processes: *Miller Heiman* and *Strategic Selling*. Include the *Prospecting* and *Perception Analysis* stage values in the sales process *Miller Heiman*, but exclude them from the sales process *Strategic Selling*.

3. **Create record types and associate them with business processes**

   Create three record types: *Hardware*, *Software*, and *Consulting*. Associate both the *Hardware* and *Software* record types with the *Miller Heiman* sales process. Associate the *Consulting* record type with the *Strategic Selling* sales process.

4. **Add record types to profiles**

   Add the *Hardware* record type to the profiles of all users in your hardware sales division. Add the *Software* record type to the profiles of all users in your software sales division. Finally, add the *Consulting* record type to profiles of all users in your consulting sales division. If your hardware sales division cross sells software and consulting, add the *Software* and *Consulting* record types to the user profile for hardware sales users.

Managing Master Picklists

Your master picklists are complete lists of the available values shared across record types, including sales, support, and lead processes.

1. From the object management settings for opportunities, leads, cases, or solutions, go to the fields area.

2. Click **Edit** next to the picklist that you want to customize.

3. Customize the list of values for use across all your business processes.

Creating Business Processes

Tips for Business Processes

- If you add a picklist value to the master picklist, you must also manually add the new value in any desired business processes.
- If you remove a value from the master picklist that is included in a business process, it is no longer a picklist option for new records in that business process. However, existing records assigned to the deleted value still display that value.

Administrators and users with the "Customize Salesforce" permission can create sales processes for opportunity records, lead processes for leads, support processes for cases, and solution processes for solutions. Before you begin, decide how you would like to categorize the picklist values for the opportunity stage, lead status, case status, and solution status picklists.

1. From Setup, enter `Processes` in the `Quick Find` box, then select **Sales Processes**, **Lead Processes**, **Support Processes**, or **Solution Processes**.

2. Click **New**.

3. Enter a name and description for the new process.

4. Optionally, choose an existing business process to copy the picklist values.

5. Click **Save**.

6. Choose a value from the Available Values list and add it to the Selected Values list to include that value in the new process. Users can choose from the list of selected values when creating and editing records.

7. For a lead, support, or solution process, select a default value.

8. Click **Save**.

9. Associate the business process with a record type.

Creating Record Types

Tips for Record Types

- When you create a record type, it automatically includes the master picklist values for both standard and custom picklists. You can customize the picklist values for the record type, but you are not required to do so.
- If you add a picklist value to the master picklist, you must also manually include the new value in any record type picklists.
- If you remove a value from the master picklist that is included in a record type, it is no longer a picklist option for new records of that record type. However, existing records assigned to the deleted value still display that value.
- You can rename a record type without affecting its picklist values or the records assigned to it.

A record type allows you to define different sets of picklist values for both standard and custom picklists. Your business process won't be available to users until you associate it with a record type and add the record type to user profiles.

- Associate your new sales process with an opportunity record type.
- Associate your new lead process with a lead record type.
- Associate your new support process with a case record type.
- Associate your new solution process with a solution record type.

1. From the object management settings for opportunities, leads, cases, or solutions, go to Record Types.

2. Click **New**.

3. Select an existing record type if you would like the new record type to adopt the picklist values included in the existing record type.

4. Enter a name, description, and select a sales, lead, support, or solution process to associate that business process with the new record type.

5. Check `Active` to activate the new record type.

6. Check the `Enable for Profile` column for profiles that should have access to the record type. Also, check the `Make Default` column to make the new record type the default for any enabled profile.

7. Click **Next**.

8. Select a page layout to use when displaying records of this record type.

9. Click **Save**.

   The page displays the custom and standard picklists available for the selected tab. Any changes you make to the picklist values only apply to the record type listed in the title of this page.

10. Click **Edit** next to any picklist to customize the values included in the new record type.

11. Choose a value from the Available Values list and add it to the Selected Values list to include that value in the selected record type. Users will be able to choose from the list of selected values when creating and editing records of this record type.

12. Select a default value for the picklist in this record type.

13. Click **Save**.

Setting Personal Options for Record Types

Notify your users that they can set a personal option to automatically select the default record type on their user profile. Likewise, users can set this option to prompt them for a record type every time they create a new record. For example, users that create opportunities for hardware, software, and consulting divisions, can customize their personal settings to prompt them for a record type when creating new opportunities.

1. From your personal settings, enter *Record Type* in the `Quick Find` box, then select **Set Default Record Types** or **Record Type Selection**—whichever one appears.

2. Check the appropriate box if you would like to automatically use the default record type when creating a new record of that type. All unchecked boxes in this list indicate that you prefer to select a record type.

3. Click **Save**.