What is a workflow in Dynamics 365?

A **workflow** in Dynamics 365 is a series of functions or methods, called **steps**, that are performed sequentially. The Workflow can change the processing direction by using conditionals, referred to as **conditional branches**.

A workflow is an excellent tool for managing both data and processes. Using workflow rules in Dynamics 365, we can easily ensure that certain steps are followed and that required business processes are executed.

Workflow in Dynamics 365 are two types: **Asynchronous workflows** and **Real-time (synchronous) workflows**.

### Asynchronous workflows

Asynchronous workflows in Microsoft Dynamics 365 uses windows service to act as a host application for the workflow engine to work. This **Asynchronous workflows** must be running ton the Windows CRM server, otherwise the workflow won’t execute.

### Real-time Workflow

Real-time workflows in Dynamics 365 are also known as Synchronous workflows. These are defined using the workflow entity records and specifically designed for non developers. They execute using the Event Execution Pipeline, much like plug-ins, and they can be executed pre-operation, post-operation, or during the core operation. Also, as with plug-ins, you cannot execute a real-time workflow before the Create operation or after the Delete operation.

- Real-time Workflows cancel and roll back the core platform operations.
- Real-time Workflows can be converted to Asynchronous workflows and vice-versa.

How to create a Workflow in Dynamics 365?

In this [Dynamics 365 tutorial](https://www.tutorialkart.com/dynamics-365-tutorial), we are going to create a real-time workflow that sends an e-mail to any new students after 2 minutes hours of their records being created. Follow the steps given below to create workflow in Dynamics 365.

- Navigate to **Settings | Solution (Tutorialkart) | Processes | New**
Click on the New button.

Defining Workflow properties.

- Enter process name as “Student Welcome Email”.
- Now select the category as “Workflow” and uncheck the Run this workflow in the background (recommended) checkbox. If this check box is checked, the Workflow in Dynamics 365 will run as an Asynchronous workflow.
- Select the Entity as “Student”.

Now click on **Ok** button.

Defining the scope of the Workflow.

After creating Process in Dynamics 365, now go to the process name and open the process as shown below.
We cannot run Real-time works in Dynamics 365 before records creation or after record deletion. We can select Record is Created and Record Is Deleted options, but we can’t change the start when the drop-down option is in font of them.

Adding Business logic to Workflow in Dynamics 365.

In this step, we are going to add business logic to workflow in Dynamics 365 to send an E-mail to students when their record has been created. As shown below click on Add Step | Wait condition.

- Click on Wait condition as shown above.

Now we have to add Wait condition, click on `<condition> (click to configure)` as shown below.

- Click on Select link.
Select Process in the first column.

Click on Select to add execution time in the second column.

Select Execution Time in the second column.
- Click on Select link to add Operator in the third column.

![Image](tutorialkart.com)

- Select “**Equals**” in the third column from the drop down list.

![Image](tutorialkart.com)

- In the last column, Enter execution value using Form assistance on the right-hand side.

![Image](tutorialkart.com)

**Note**: We have to send an E-mail to student when their new record is created after 2 minutes.

- Select 2 under minutes.
- Select after.
- Select Students entity in Look for process.
- Click on Record Created and the value will be automatically inserted as shown below.

![Image](tutorialkart.com)
Click on Save and Close button.

Adding Check condition to Workflow in Dynamics 365.

After adding Wait for a Workflow in Dynamics 365, we have to add check condition. To add go back in to your process and click on Select this row and Click Add Step under Wait Condition.

As shown in the above Wait condition add all the steps shown below.

Click on Save and Close button.

Adding Email properties to a Workflow.

After creating Wait condition and Check Condition, finally we have to Add Step to Send email to students. Navigate to Add Step | Click on Send email.

Now a screen will be opened as shown below, Select Create new Message from the drop-down and click on Set Properties.
Adding Email details using Form assistance.

- Go to To : using form assistance on the right, select Student under Look for followed by Students on the next drop down.
- Now click on Add button.

- Finally click on Ok button.

- Enter Email Subject and Enter email body as shown above..
- Finally click on Save and close button.
How to Activate a Workflow in Dynamics 365.

After successfully creating workflow in Dynamics 365, we have to activate a Student Welcome Email workflow. Navigate Settings | Processes | Click on Activate button.

Now a pop-up window will be opened, showing to confirm the process activation.

- Click on Activate button

```
Process Activate Confirmation
Do you want to activate the selected 1 Process?

Text
This action will attempt to activate the Process you have selected.
```

- Finally click on Ok button.

```
Confirm Application of Workflow
This workflow will be applied to 1 Students.
tutorialkart.com

You can monitor workflow jobs by opening each Students and clicking Workflows.
Are you sure that you want to continue?
```

Now the Workflow in Dynamics 365 is activated. When a new student record is created, the Workflow will start waiting. In the above we selected the process as an On-demand process, we have to trigger Workflow manually to send the Welcome email to students.

How to Run Workflow in Dynamics 365.

In this step, we are going to check the working condition of Workflow that we created. Navigate to Student Entity and create a new record.
- open the Record and click on Run Workflow.

- Select the process name and click on Add button.
- Click on Ok button.
Microsoft Dynamics 365 Basics

- What is Microsoft Dynamics 365?
- Microsoft Dynamics CRM Modules.
- Navigation and User Interface
- What is an Entity?
- What is Solution?
- What are Web Resources?
- What is a site map Designer?

Microsoft Dynamics 365 for Sales

- Dynamics 365 for Sales Basics
- How to create an Entity in Dynamics CRM?
- Creating Entity Form in Dynamics CRM
- Different Sales Module Entities
- How to create a lead.
- How to create an opportunity?
- How to add a Lead Source?
- How to convert a lead to an Opportunity.
- Relationships in Dynamics CRM : 1:N, N:1, N:N

Microsoft Dynamics 365 for Service.

- Service Dashboards.
- Service Reports

Microsoft Dynamics 365 for Marketing.

- Marketing Module Entities
- Marketing Dashboards.
- Marketing Reports