



PROCESS GENIE

Make your CRM Processes perform magic!

Ever wanted to set the time for a follow up phone call or task to be the next working day?

Or loop over a set of records and update an attribute on each record?

What about executing a workflow for all child records of a given parent record?

Or finding the average value of a field for a given entity?

How about creating a many-to-many relationship as part of your workflow?

Or what about quickly creating a copy of a record?

Process Genie transforms what you can do with Microsoft Dynamics CRM processes. It helps simplify delivery of your CRM projects so you have happy customers.

Combined with the Real-time Workflows in Dynamics 365 **Process Genie** is immensely powerful – many things you would have done in the past which required a developer and custom code can now be done with **Process Genie**, saving you time and money.

With over **350 functions** at your disposal you will struggle to find something you can't do in your Workflow, Dialog and Action processes. If for some reason **Process Genie** does not deliver on your needs, let us know and we will add it our roadmap.

It's easy to set up and takes just 2 or 3 simple steps to use **Process Genie** in your CRM Process:

1. Create your Process Genie Formula
2. Add the Process Genie step in your CRM Process and reference your Process Genie Formula
3. (Optional) Use the result of the Process Genie Formula in following steps of your process

Get started with **Process Genie** today – visit www.north52.com/process-genie for further information and to download a free trial.

Works with Dynamics 365, CRM 2016, CRM 2015, CRM 2013 and CRM 2011 (UR12+) Online or On-Premise

**Over 350
functions to
extend CRM
Process
capabilities**

