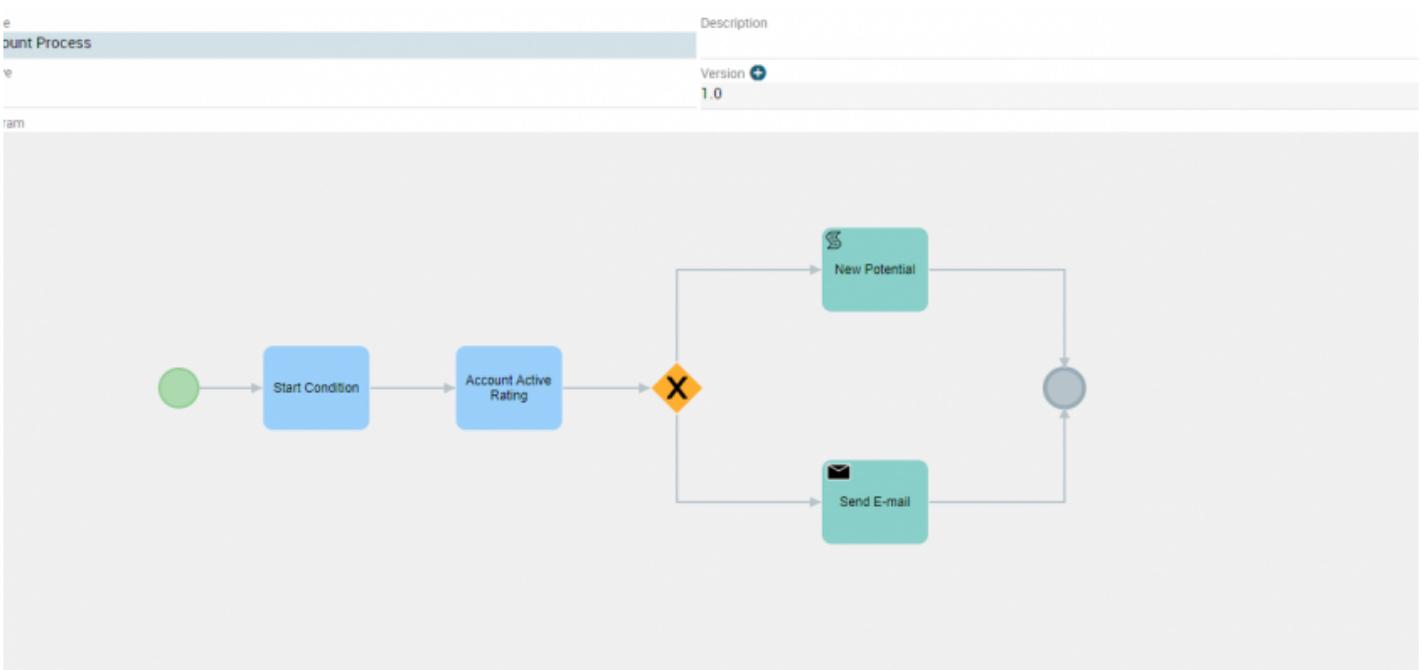


# Basic Process Configuration

- [Basic Process Configuration](#)
- [Basic Process Activation](#)

# Basic Process Configuration



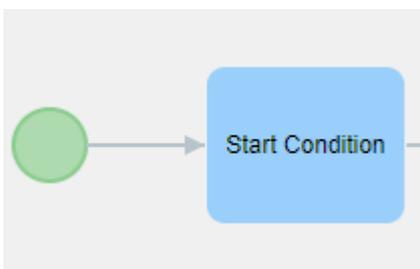
**The process represented above is now described in detail.**

It is really easy:

the process starts every time a new company record is created and its Rating is checked.

Depending on that the flow takes two different paths.

If the value is set on “Active” a new Potential is created, otherwise an email is sent to the administration department to inform them of the company’s record creation.



This process is designed to start every time a new company record is created. For that reason on “when to run the check” the option “on create” has been chosen.

BPMN-Task: Start Condition Task\_06err4k

[SAVE](#) [CANCEL](#)

Entity Account ▼

When to run the check

- on create
- on create / change
- on change
- every time the condition is true
- when executed subprocess

Conditions [NEW GROUP](#)



Once the process has been performed, we find this **Conditional Task**.

On “when to run the check” has been chosen the condition “every time the condition is true”; in this way there is no need for a manual intervention of the user and the process continues every time the condition is true.

BPMN-Task: Check condition Task\_1rljnpv

[SAVE](#) [CANCEL](#)

Entity [\$0] Accounts (BPMN-Task: Start Condition) ▼

When to run the check

- on change
- every time the condition is true

Conditions [NEW GROUP](#)

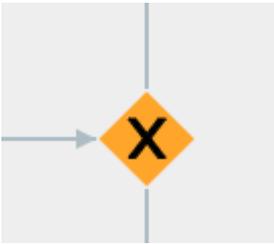
Rating ▼ equals ▼ Active ▼ ✕

[NEW CONDITION](#)

or ▼

Rating ▼ not equal to ▼ Active ▼ ✕

[NEW CONDITION](#)



At this point the process is divided in different paths, considering the conditions previously set. Here in the previous condition two groups of conditions were set (OR), for that reason we can see two different paths.

One of these (status Active Company Rating) will lead to the creation of a new Opportunity related to the company, the other (Company Rating Non Attivo) will send an informative email.

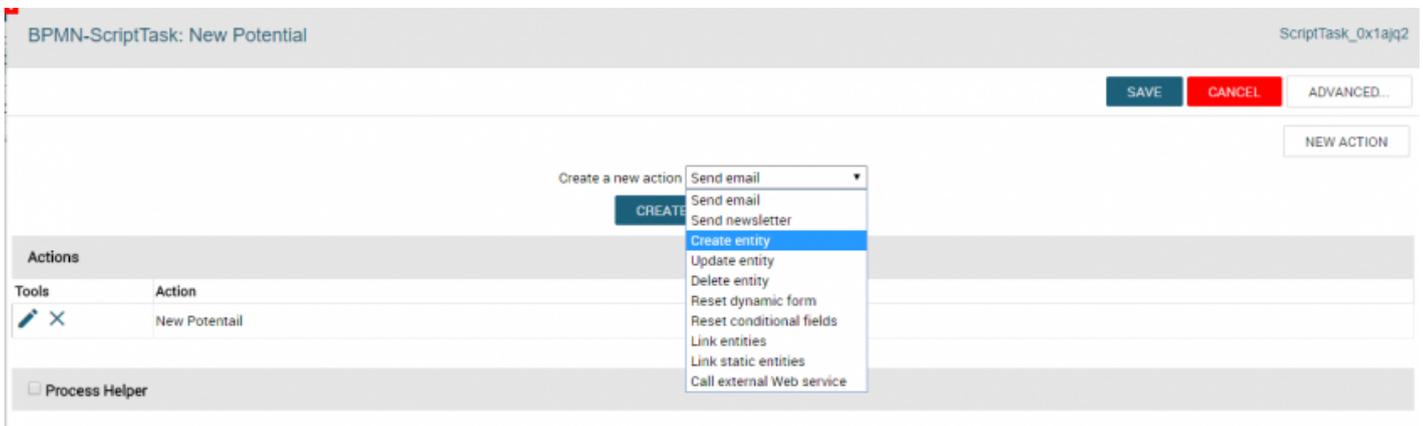
A screenshot of a BPMN Exclusive Gateway configuration interface. The title bar shows "BPMN-ExclusiveGateway" on the left and "ExclusiveGateway\_03tnkda" on the right. Below the title bar are "SAVE" and "CANCEL" buttons. The main content area is titled "Account Active Rating" and contains two conditions with dropdown menus: "Rating equals Active" with "ScriptTask: New Potential" selected, and "Rating not equal to Active" with "SendTask: Send E-mail" selected.

## Let's analyze the first:

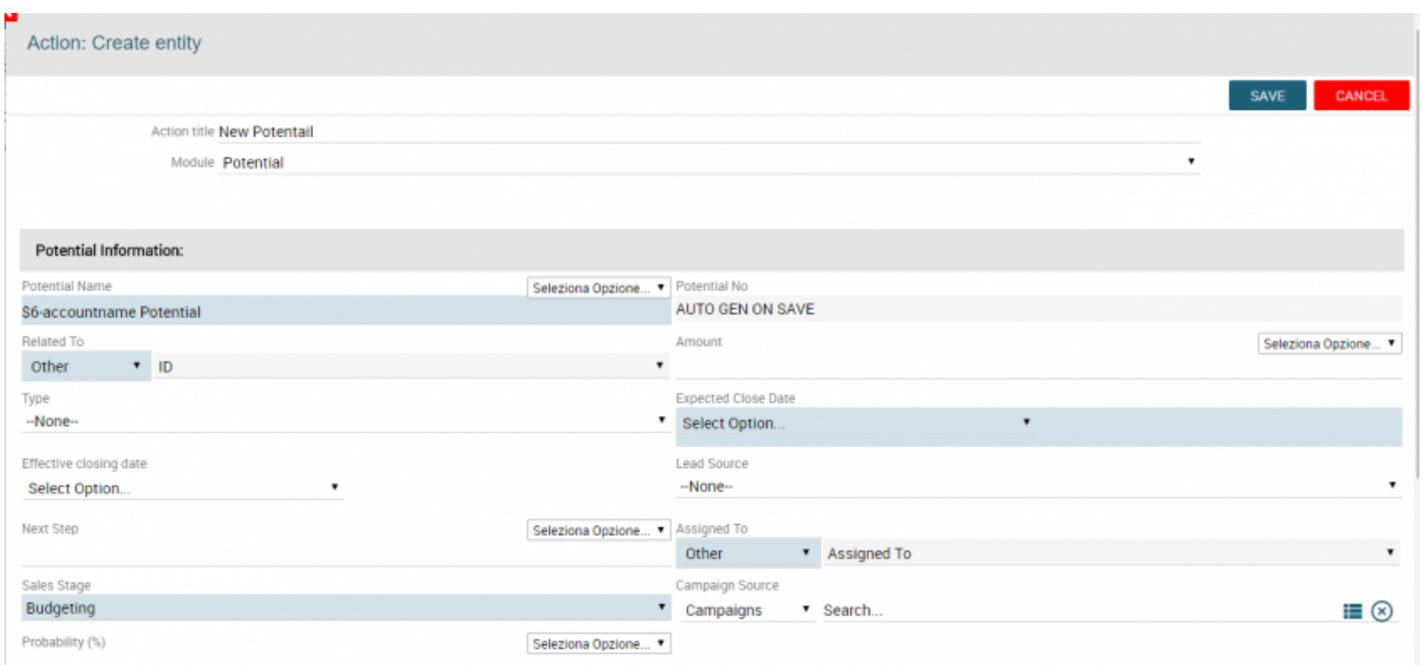


You create a ScriptTask with the action **“Create entity”**, then you choose the module Potentials. It is recommended to always name the actions, in this case “New Potential”.

It is always recommended to give a reference name to the actions of the process, in this case “New Opportunity”.

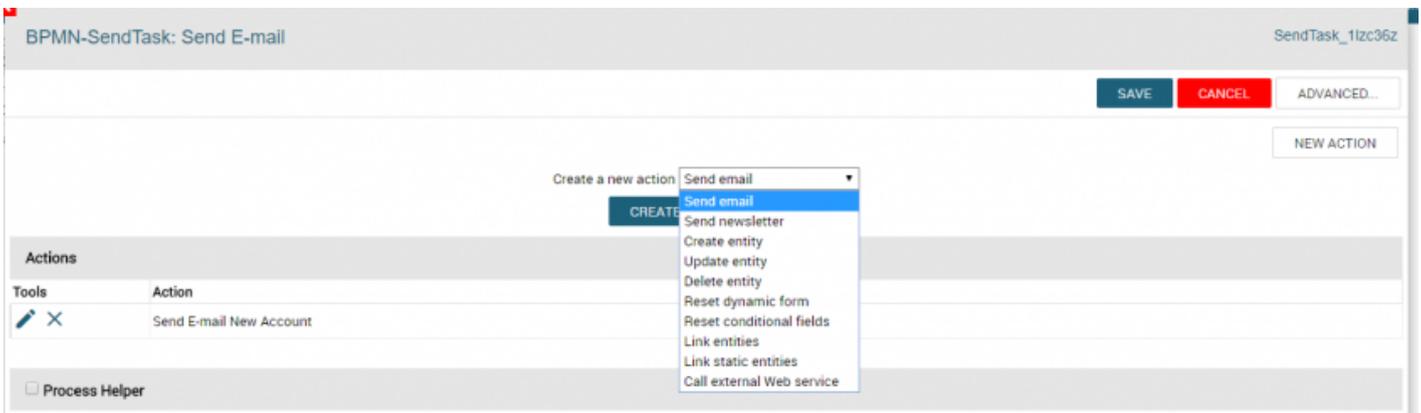


Once the desired module is selected, in this case the “Potentials” one, all the related fields are shown. Those can be mapped by taking data from all the related entities, from the selected one and from all the entities connected to the process itself.

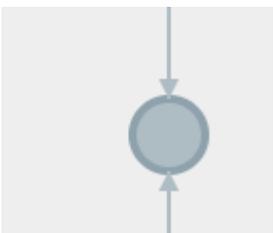
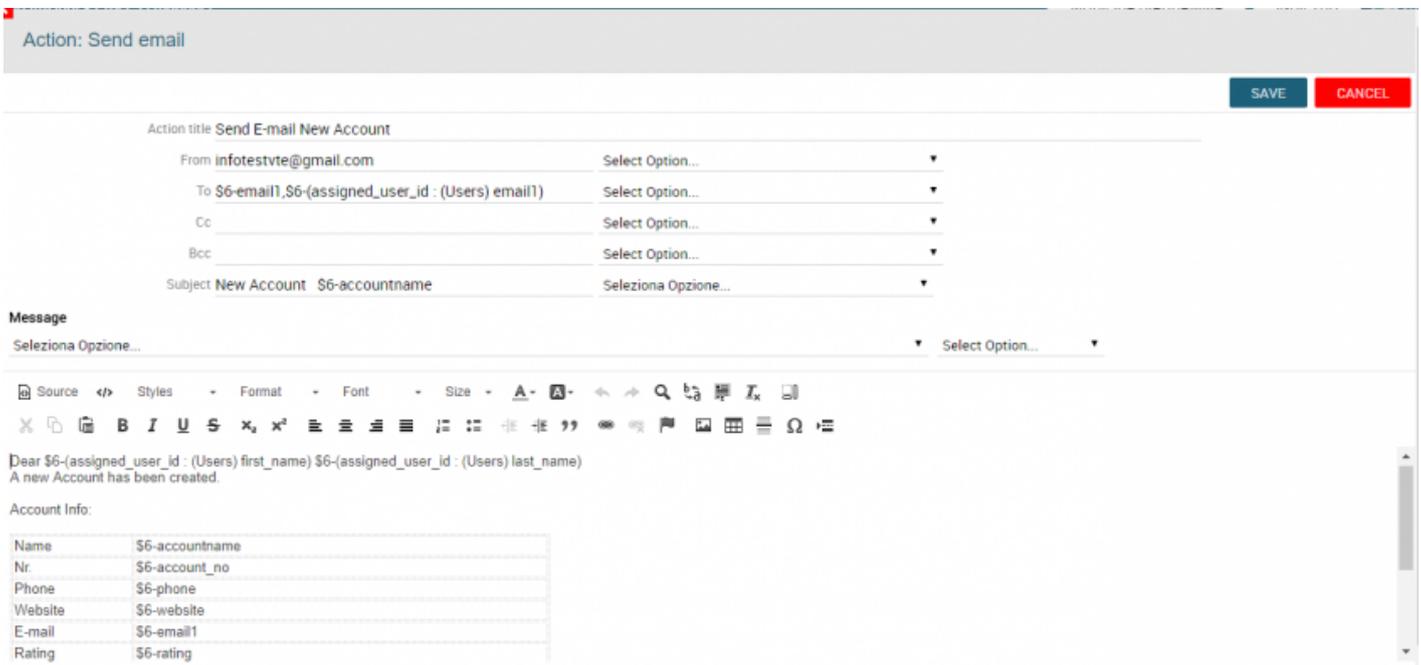


In the other path, an email that notifies the creation of the company record is sent. We create a Send Task and the “Action” chosen is send email.

As previously said it is highly recommended to give a name to every action, in this case is “New Company Email Send”.



Sender, Receiver, Subject and all the other classical information needed are displayed. Every field can be mapped by taking the data from the different field of the entities recalled in the process. In the body of the email it is possible to use some special functions that can be selected from the Pick list on the right.



At this point, the process converge in one element, the End Event. Therefore the Ended Status is set.

BPMN-EndEvent EndEvent\_117dgrv

---

**Actions**

*No actions configured*

---

**Process Helper**

Assigned To: Other | BPMN-Task: Start Condition | Related to: [S6] Accounts (BPMN-Task: Start Condition)

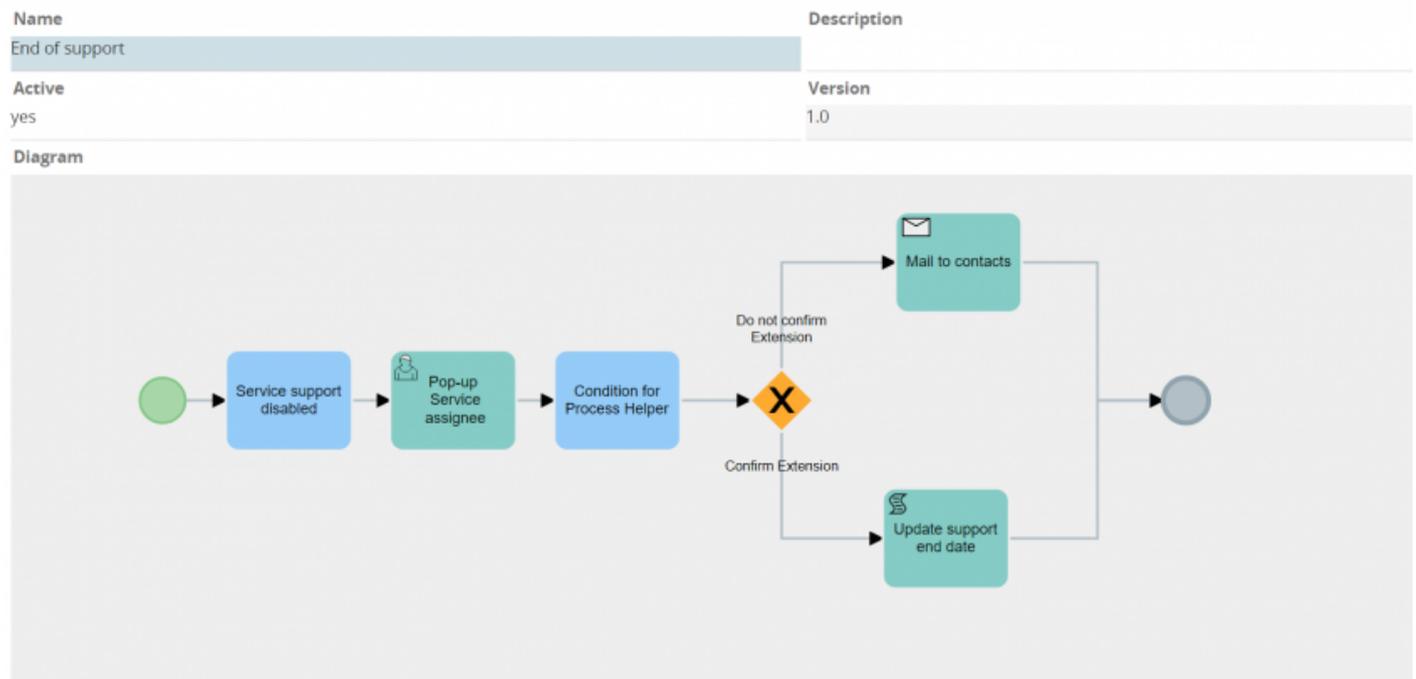
Status: Ended |  Process Name: Seleziona Opzione...

Instructions: Seleziona Opzione...  Show popup in the related entity

---

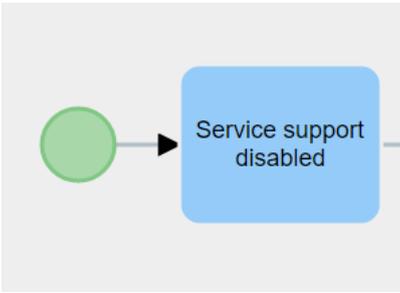
Manage dynamic form

## End of support service



The following process manage the end of of support service.

The description of the process is the following when a user check the field "end of the support" inside the Service module the assignee of that service will be notified with a pop-up where is asked if he/she wants to extend the support or confirm the end. Depending on the choice made by the asignee the process will take two differents process branches.



[SAVE](#) [CANCEL](#)

Entity Service ▼

**When to run the check**

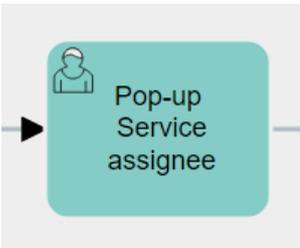
- on create
- on create / change
- on change
- every time the condition is true
- when executed subprocess
- on relation with: HelpDesk ▼

**Conditions** [NEW GROUP](#)

End of Support ▼ has changed to ▼ yes ▼ 🗑️

[NEW CONDITION](#)

The process start when a user modify the field “End of Support” to the value “yes” within the module Service. This condition prevent that the process is trigered each time that any entity inside the module Service is modified.



BPMN-UserTask: Pop-up Service assignee Task\_1grjmza

**Actions**

*No actions configured*

**Process Helper**

Assigned To:  Related to:

Other:  \$62-crmid

Status:    Process Name:

Requested action:   Show popup in the related entity

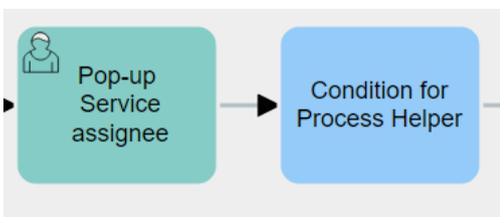
Show documents of the related entity

**Manage dynamic form**

**Service Support**

End of support	<input type="text" value="Support end date"/>
----------------	---

The process continues with a pop-up that ask to the assignee of the service if he/she wants to extend the support or if he/she wants confirm the end. The pop-up is made through an “user task” where is checked the box “process helper”. Inside the Process Helper configuration is set the person who will see the pop up as well as the linked entity and the message that will be displayed to the assignee. In addition the process helper has one section with two fields: one to confirm the extension of the service support ( which is a check box that is set to mandatory) and the other “Support end date” ( which is a date field ththat is mandatory only in the case that the assignee confirm the extension of the service).



BPMN-Task: Condition for Process Helper Task\_0lkuwtl

Entity:

**When to run the check**

on change  
 every time the condition is true

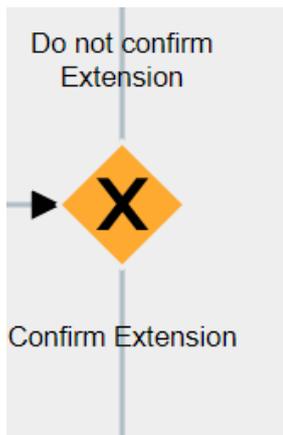
**Conditions**

equals

or

equals

For the correct visualization of the pop-up is needed a “conditional task” after the user task. Inside this task are set two group conditions on the new field ( End of Support). These two conditions will be used in the next step.

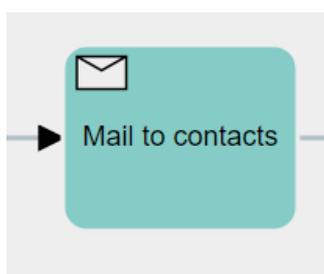


The configuration interface for an Exclusive Gateway. The title bar shows "BPMN-ExclusiveGateway" on the left and "ExclusiveGateway\_0s82ze4" on the right. There are "SAVE" and "CANCEL" buttons in the top right corner. The main area is titled "Condition for Process Helper" and contains two rows of configuration:

Condition	Action
End of Support equals true:boolean	SendTask: Mail to contacts (Do not confirm Extension)
End of Support equals false:boolean	ScriptTask: Update support end date (Confirm Extension)

At this point the process reach gateway here the process can potentially take two braches depending on the choice made by the assignee: If the assignee choosed to don't extend the support service each contacts, related to that service, will be notified with an email; on the other hand if the assignee choosed to extend the support date the service record will be update with the new date indicated by the assignee.

### 1 case the asignee of service do not confirm the support service extension



The process will send an email to each contacts related to that service. This action is made with the action cycle related records, starting from the module service the process cycle to each single contact and it send email.

SAVE

CANCEL

ADVANCED...

NEW ACTION

Create a new action  on related module  and for each row 

CREATE

CANCEL

## Action: Cycle Related Records

SAVE

CANCEL

From	<input type="text" value="Info@service.it"/>	<input type="text" value="Select Option..."/>
To	<input type="text" value="\$63-email"/>	<input type="text" value="Email"/>
Cc	<input type="text"/>	<input type="text" value="Select Option..."/>
Bcc	<input type="text"/>	<input type="text" value="Select Option..."/>
Reply to	<input type="text" value="\$62-(assigned_user_id : (Users) email1)"/>	<input type="text" value="Assigned To : (Users) email"/>
Subject	<input type="text" value="Service support deadline has been reached"/>	<input type="text" value="Select Option..."/>
Relate email to	<input type="text" value="ID"/>	
Attach documents from	<input type="text" value="ID"/>	

## Message


Dear \$63-firstname \$63-lastname the present email to report that your service support linked to the \$62-servioename has expired. If you want to extend the service support please reply to this email.

Admin

## 2 case the assignee of service confirm the support service extension



In this case the support date will be updated with the value that the assignee passed in the process helper step. In this step is used the action update entity with the Renewal date mapped to the field support end date.

SAVE CANCEL

Action title Update Service end support  
Entity ID

Service Information

Service Name   
\$62-servicename  
 Usage Unit   
Other  
 No of Units   
 Category   
Other  
 Sales Start Date   
 Support Start Date   
 Service No  
AUTO GEN ON SAVE  
 Active  
No  
 Website   
http://  
 Assigned To   
Other \$62-assigned\_user\_id  
 Sales End Date   
 Support Expiry Date  
Support end date  
+ days

In the end the last task (end event) is configured as shown below:

SAVE CANCEL ADVANCED...

NEW ACTION

Actions

No actions configured

Process Helper

Assigned To  Related to   
Other \$62-assigned\_user\_id \$62-crmid  
Status  Ended  
Requested action   
 Show popup in the related entity  
 Show documents of the related entity

# Basic Process Activation

## PROCESS ACTIVATION

We proceed by creating a new company record.

The Rating field, in this case, is set on Active, therefore a new potential should be created.

Creating Account SAVE CANCEL

---

**Account Information**

Account Name	Account No
LearnKop	AUTO GEN ON SAVE
Website	Phone
http:// www.learnkop.com	02214785239
Fax	Member Of
02214785239	Search...  
Phone (other)	Employees
	24
Email	email (other)
infolearnkop@administration.com	
Ownership	Industry
	Utilities 
Rating	Type
Active	Customer 
Lock Automatic Emails	Annual Revenue: (€)
<input type="checkbox"/>	
Bank Details	VAT Registration Number

Once the record is saved we should find a New Potential related to the company itself, containing the name and data inserted in the related configuration. Here below we can see the details:

← Account LearnKop Updated today (05 Mar 2018) EDIT       

**Informations** Process Graph History

---

**Account Information** 

Account Name	Account No
LearnKop	ACC12
Website	Phone
www.learnkop.com	02214785239
Fax	Member Of
02214785239	
Phone (other)	Employees
	24
Email	email (other)
infolearnkop@administration.com	
Ownership	Industry
	Utilities
Rating	Type
Active	Customer

Relations

-  Processes 1
-  Potentials 1
-  Contacts
-  Quotes
-  Sales Order
-  Invoice
-  Activities
-  Documents
- More

Account LearnKop Updated today (05 Mar 2018)

Showing 1 - 1 of 1

Action	Potential	Related To	Sales Stage	Amount (In €)	Expected Close Date	Assigned To
	LearnKop Potential	LearnKop	Budgeting	0.00	05-03-2018	admin (User Administrator)

ADD POTENTIAL

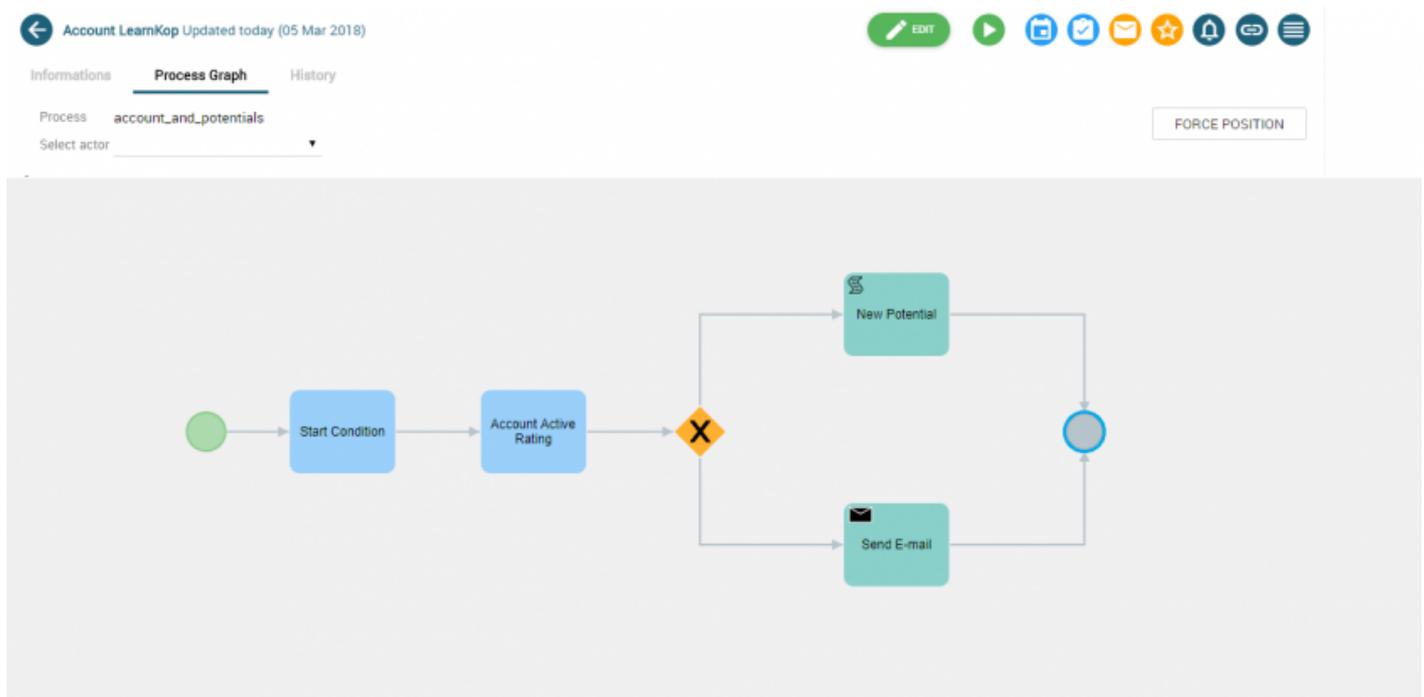
Processes 1

Potentials 1

Contacts

## The process ended its flow.

We can notice this also by clicking on the tab “Process Graph” of the created company. Looking at the graph we can define which path took the flow and where it stopped. In this case the highlighted point, that is where the process stopped, is the End Event.



If the Rating field wasn't active a recap email would have been sent to the email address reported in the module (Email field) and to the assignee of the record.

Here below you can find an example:

Dear User Administrator  
A new Account has been created.

Account Info:

Name	LearnKop
Nr.	ACC13
Phone	02214785239
Website	<a href="http://www.learnkop.com">www.learnkop.com</a>
E-mail	<a href="mailto:infolearnkop@administration.com">infolearnkop@administration.com</a>
Rating	Acquisito
Type	Azienda
Assigned To	admin

Best Regards,

Administration

## PROCESS ACTIVATION - End of Support Service

The process start when the service record is modified ticking the box "End Support" to the value "yes".

← Service Cloud server Installation and setup

Informations Process Graph Process History History

### Service Information

<b>Service Name</b>	Cloud server installation and setup	<b>Service No</b>	SER10
<b>Usage Unit</b>	Days	<b>Active</b>	yes
<b>No of Units</b>	0	<b>Website</b>	
<b>Category</b>	Support	<b>Assigned To</b>	
<b>Sales Start Date</b>	05-08-2019	<b>Sales End Date</b>	11-08-2025
<b>Support Start Date</b>	05-08-2019	<b>Support Expiry Date</b>	03-08-2021
<b>Time created</b>	11-08-2021 10:44:17	<b>Modified Time</b>	23-08-2021 15:31:27
<b>Creator</b>		<b>End of Support</b>	yes

Once the record will be saved the following pop-up will appear to the assignee of that service:

SAVE

CANCEL

**Requested action**

Check the End Support box if you want to confirm the ending of the support for Cloud server installation and setup.

**Service Support**

End of Support

  
--Please select--  
YES  
NO

Support end date

  
(dd-mm-yyyy)

This pop-up will ask to the assignee of the service if he/she wants to extend the support end date. Through the drop-down menu the assignee will choose one of the following options:

1. No – unticked End of support box to confirm the end of the support.
2. Yes – ticked End of support box to extend the duration of the service support

**1. NO - unticked End of Support box**

The expiry date is confirmed by the assignee of the service. In this scenario all the contacts related to that service will be alerted with an email.

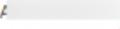
**Service support deadline has been reached**

Monday 23-08-2021 15:19:05

Details -  

Translate message

 Info@service.it 455435To: 

Dear  we sent the present email to report that your service support linked to Cloud server installation and setup has expired. If you want to extend the service support please reply to this email.

Admin.

 Talk

Start a new talk

**2. Yes - ticked End of Support box**

The expiry date will change according to the one chosen by the assignee

### Requested action

Check the End Support box if you want to confirm the ending of the support for Cloud server installation and setup.

### Service Support

End of Support

Support end date

(dd-mm-yyyy)

In this case, after saving the record will be updated with the new end support date provided by the assignee

### Service Information

Service Name

Cloud server installation and setup

Usage Unit

Days

No of Units

0

Category

Support

Sales Start Date

05-08-2019

Support Start Date

05-08-2019

Time created

11-08-2021 10:44:17

Creator

Service No

SER10

Active

yes

Website

Assigned To

Sales End Date

11-08-2025

Support Expiry Date

29-08-2021

Modified Time

23-08-2021 15:26:38

End of Support

yes



