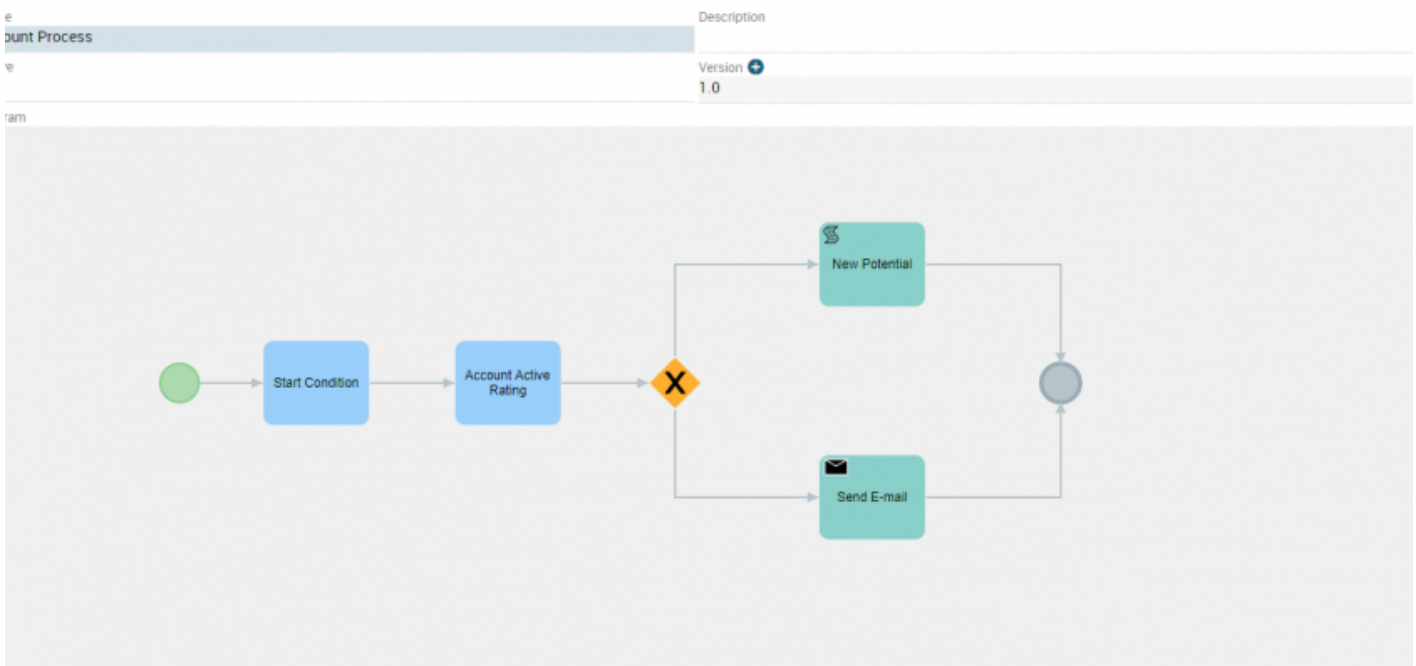


Basic Process Configuration

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

Basic Process Configuration



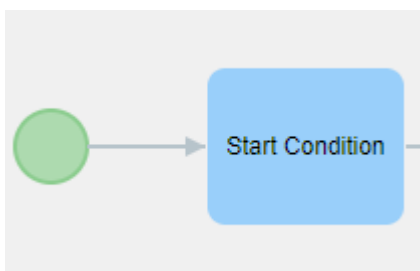
The process represented above is now described in detail.

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

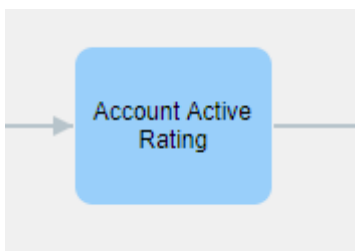
☐ on change

☐ 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_1nfnjpv

SAVE

CANCEL

Entity [\$6] 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

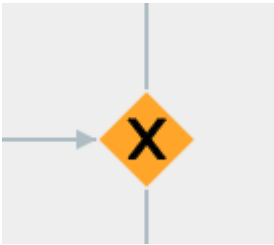
or

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.

BPMN-ExclusiveGateway

ExclusiveGateway_03tnkda

SAVECANCEL

Account Active Rating

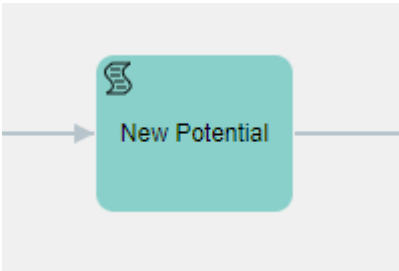
Rating equals Active

ScriptTask: New Potential

Rating not equal to Active

SendTask: Send E-mail

Let’s analyze the first:



You create a ScripTask 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”.



BPMN-ScriptTask: New Potential ScriptTask_0x1ajq2

SAVE CANCEL ADVANCED...

NEW ACTION

Create a new action CREATE

- Send email
- Send email
- Send newsletter
- Create entity**
- Update entity
- Delete entity
- Reset dynamic form
- Reset conditional fields
- Link entities
- Link static entities
- Call external Web service

Tools	Action
 	New Potential

☐ Process Helper

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.

Action: Create entity

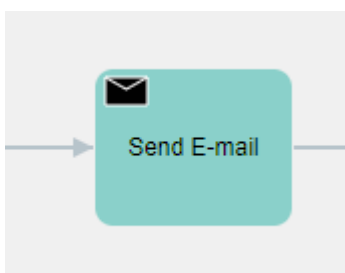
SAVE CANCEL

Action title **New Potential**

Module **Potential**

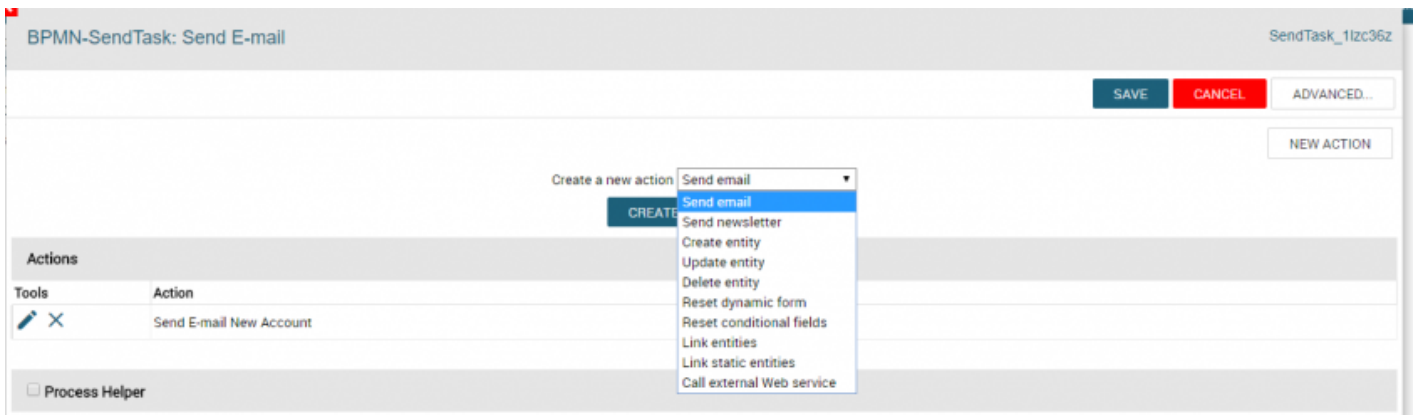
Potential Information:

Potential Name	Seleziona Opzione...	Potential No	AUTO GEN ON SAVE
Related To	Other	Amount	Seleziona Opzione...
Type	--None--	Expected Close Date	Select Option...
Effective closing date	Select Option...	Lead Source	--None--
Next Step	Seleziona Opzione...	Assigned To	Other
Sales Stage	Budgeting	Campaign Source	Campaigns
Probability (%)	Seleziona Opzione...		Search...

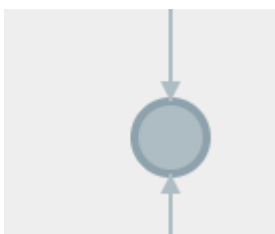
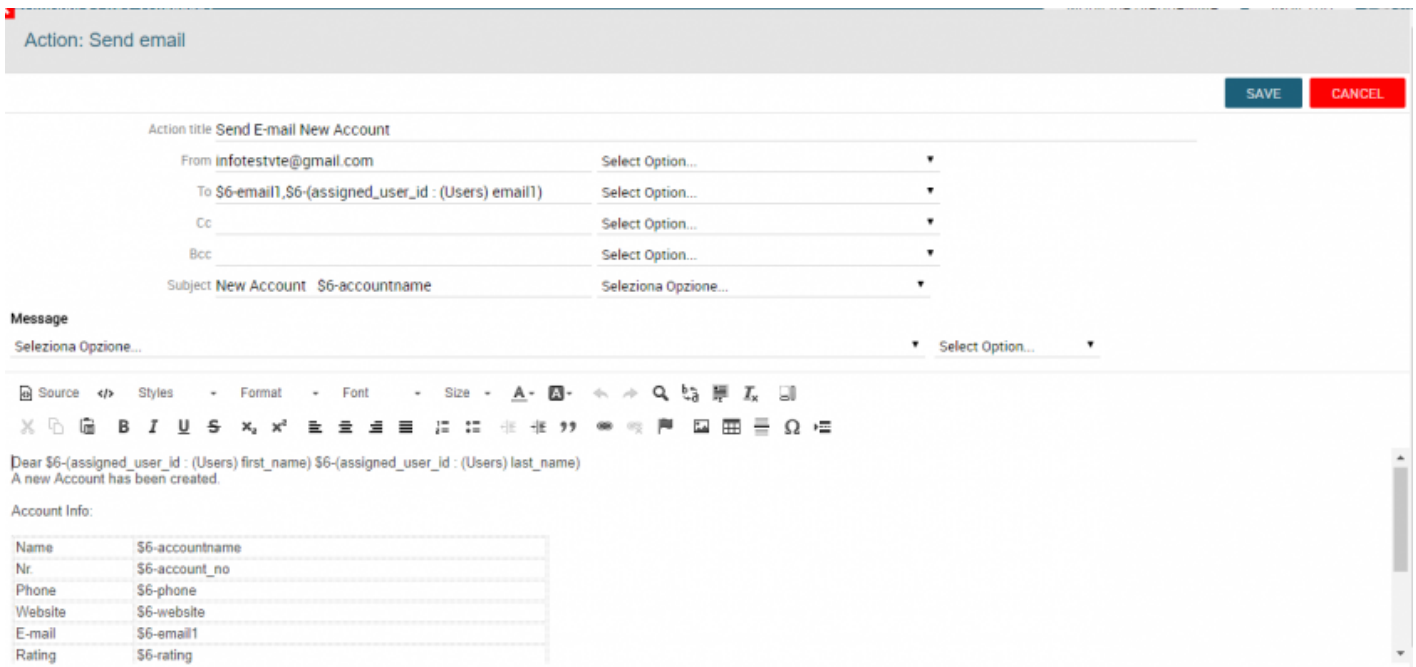


In the other path, an email that notifies the creation of the company record is sent. We create a Send Task and the “Action” chosen is send email.

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_117dgrw

SAVE
CANCEL
ADVANCED...

NEW ACTION

Actions

No actions configured

☒ **Process Helper**

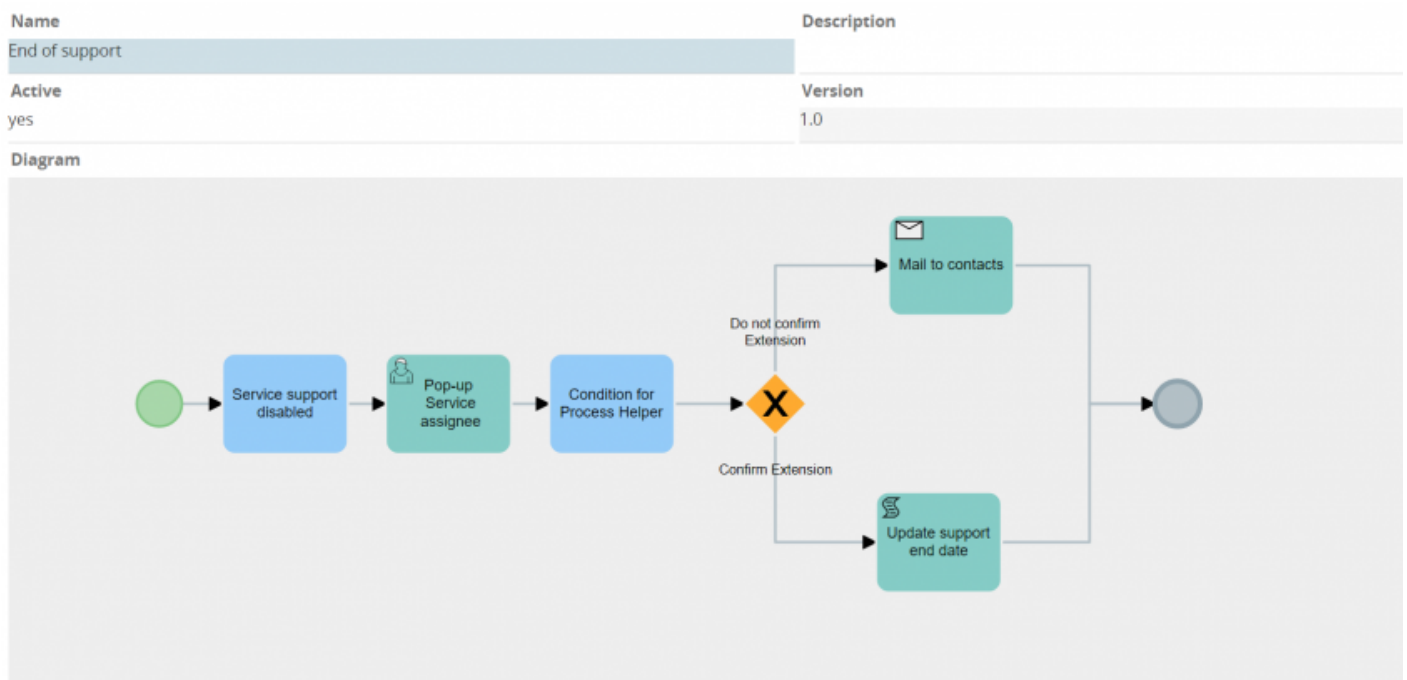
Assigned To: Other ▼
Related to: BPMN-Task: Start Condition ▼
Status: Ended ▼
Instructions: Seleziona Opzione... ▼

Related to: [\$6] Accounts (BPMN-Task: Start Condition) ▼
☐ Process Name
Seleziona Opzione... ▼
☐ Show popup in the related entity

Manage dynamic form

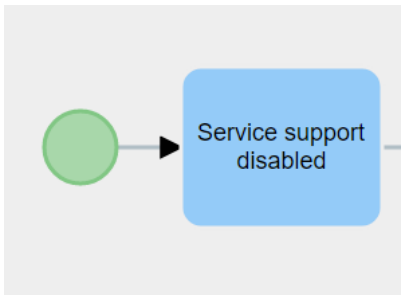
ADD BLOCK
IMPORT BLOCK...

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.



BPMN-Task: Service support disabled

Task_08eo468

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 ▼

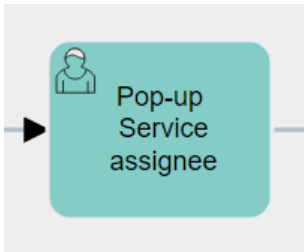
yes ▼

🗑️

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

SAVE
CANCEL
ADVANCED...

NEW ACTION

Actions

No actions configured

☒ Process Helper

Assigned To
Assigned To
Related to
ID

Other
\$62-assigned_user_id
\$62-crmid

Status
Pick list Value
Running

Requested action
Select Option...

☒ Show popup in the related entity

☐ Show documents of the related entity

Manage dynamic form

ADD BLOCK

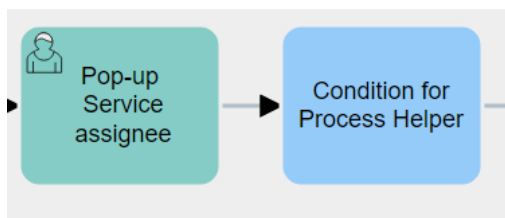
IMPORT FROM DYNAFORM...

IMPORT FROM MODULE...

Service Support

End of support
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 that is mandatory only in the case that the assignee confirm the extension of the service).



BPMN-Task: Condition for Process Helper Task_0lkuwtd

SAVE
CANCEL

Entity
\$62 Services (BPMN-Task: Service support disabled)

When to run the check

☐ on change

☒ every time the condition is true

Conditions

NEW GROUP

End of Support
equals
yes

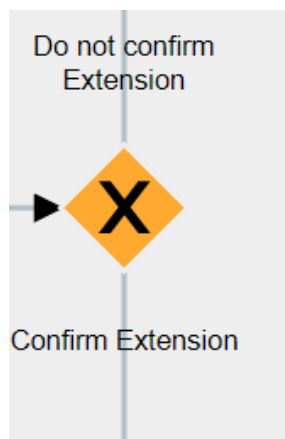
NEW CONDITION

or

End of Support
equals
no

NEW CONDITION

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.



BPMN-ExclusiveGateway ExclusiveGateway_0s82ze4

SAVE CANCEL

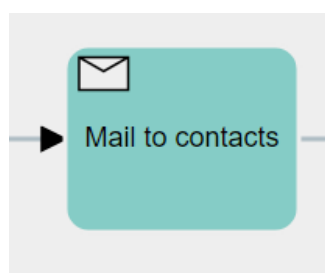
Condition for Process Helper

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 asignee.

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 Cycle Related Records on related module Contacts and for each row Send email

CREATE

CANCEL

Action: Cycle Related Records

SAVE

CANCEL

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

Message

Service Name Select Option...

Dear \$63-firstname \$63-lastname the present email to report that your service support linked to the \$62-service name 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.

Action: Update entity

SAVE

CANCEL

Action title

Update Service end support

Entity

ID

Service Information

☒ Service Name

Select Option...

\$62-servicename

☐ Usage Unit

Select Option...

Other

☐ No of Units

Select Option...

☐ Category

Select Option...

Other

☐ Sales Start Date

Select Option...

☐ Support Start Date

Select Option...

☐ Service No

AUTO GEN ON SAVE

☐ Active

No

☐ Website

Select Option...

☒ Assigned To

Assigned To

Other

\$62-assigned_user_id

☐ Sales End Date

Select Option...

☒ Support Expiry Date

Support end date

+ days

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

BPMN-EndEvent

EndEvent_0bw320d

SAVE

CANCEL

ADVANCED...

NEW ACTION

Actions

No actions configured

☒ Process Helper

Assigned To

Assigned To

Other

\$62-assigned_user_id

Status

Pick list V.

Ended

Requested action

Select Option...

Related to

ID

\$62-crmid

☐ Process Name

Select Option...

☐ 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 LearnKop	Account No AUTO GEN ON SAVE
Website http:// www.learnkop.com	Phone 02214785239
Fax 02214785239	Member Of Search... 
Phone (other)	Employees 24
Email infolearnkop@administration.com	email (other)
Ownership	Industry Utilities 
Rating Active	Type Customer 
Lock Automatic Emails <input type="checkbox"/>	Annual Revenue: (€)
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 LearnKop	Account No ACC12
Website www.learnkop.com	Phone 02214785239
Fax 02214785239	Member Of
Phone (other)	Employees 24
Email infolearnkop@administration.com	email (other)
Ownership	Industry Utilities
Rating Active	Type Customer

Relations

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

Account LearnKop Updated today (05 Mar 2018)

EDIT

▶

📅

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📧

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🔔

🔗

☰

Showing 1 - 1 of 1

ADD POTENTIAL

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)

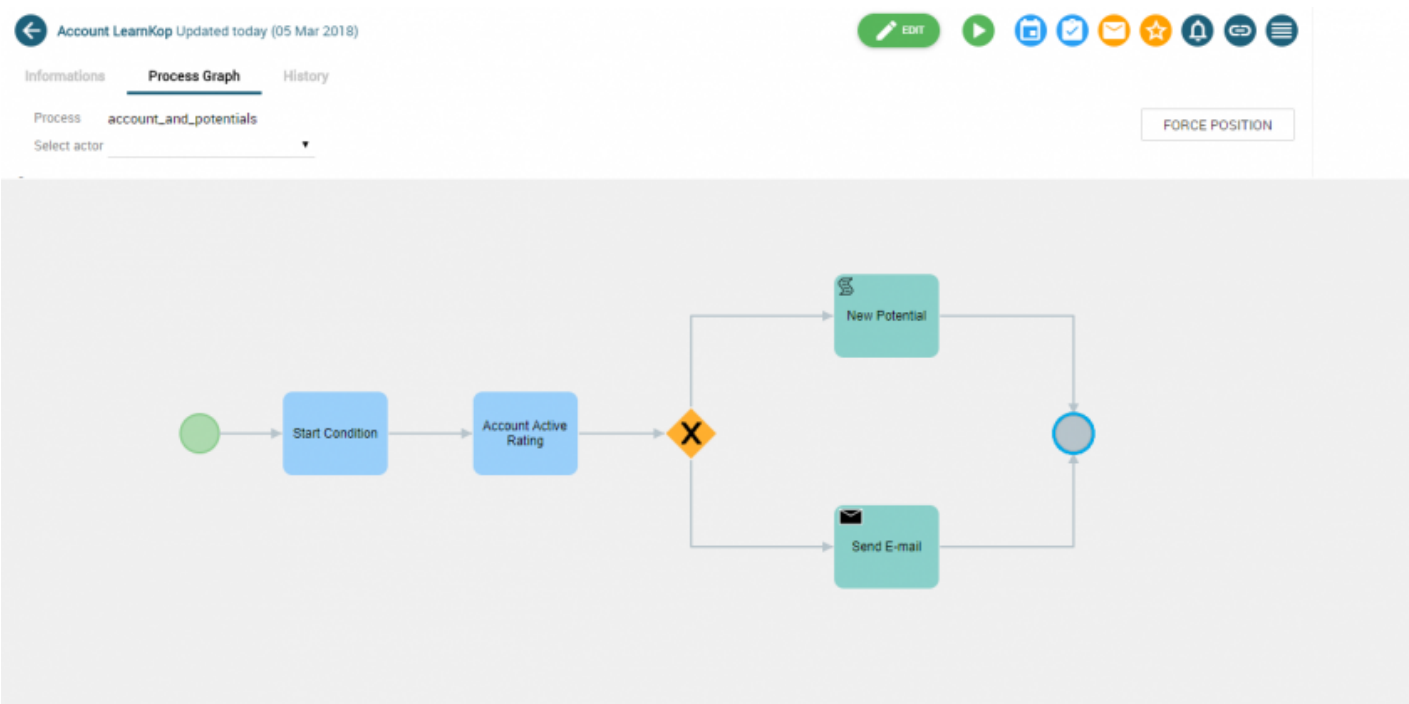
Processes 1

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	www.learnkop.com
E-mail	infolearnkop@administration.com
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 Istallation and setup

Informations

Process Graph

Process History

History

Service Information

Service Name

Cloud server istallation 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

03-08-2021

Modified Time

23-08-2021 15:31:27

End of Support

yes

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

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

no
--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 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

[Translate message](#)[Details](#) -   Info@service.itTo:  455435

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

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

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

no

Support end date

29-08-2021



(dd-mm-yyyy)

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

Service Cloud server Installation and setup

Informations

Process Graph

Process History

History

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

