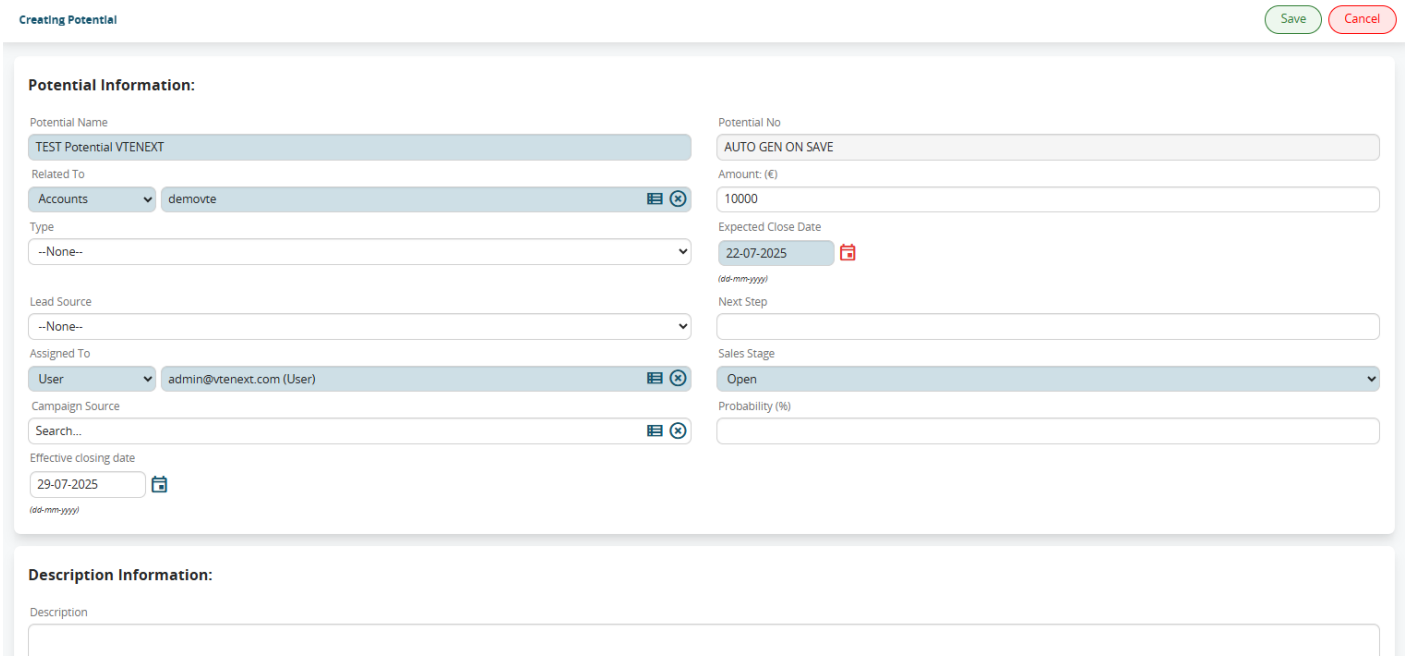
15.3 Example: Potential Management Process Activation

PROCESS ACTIVATION

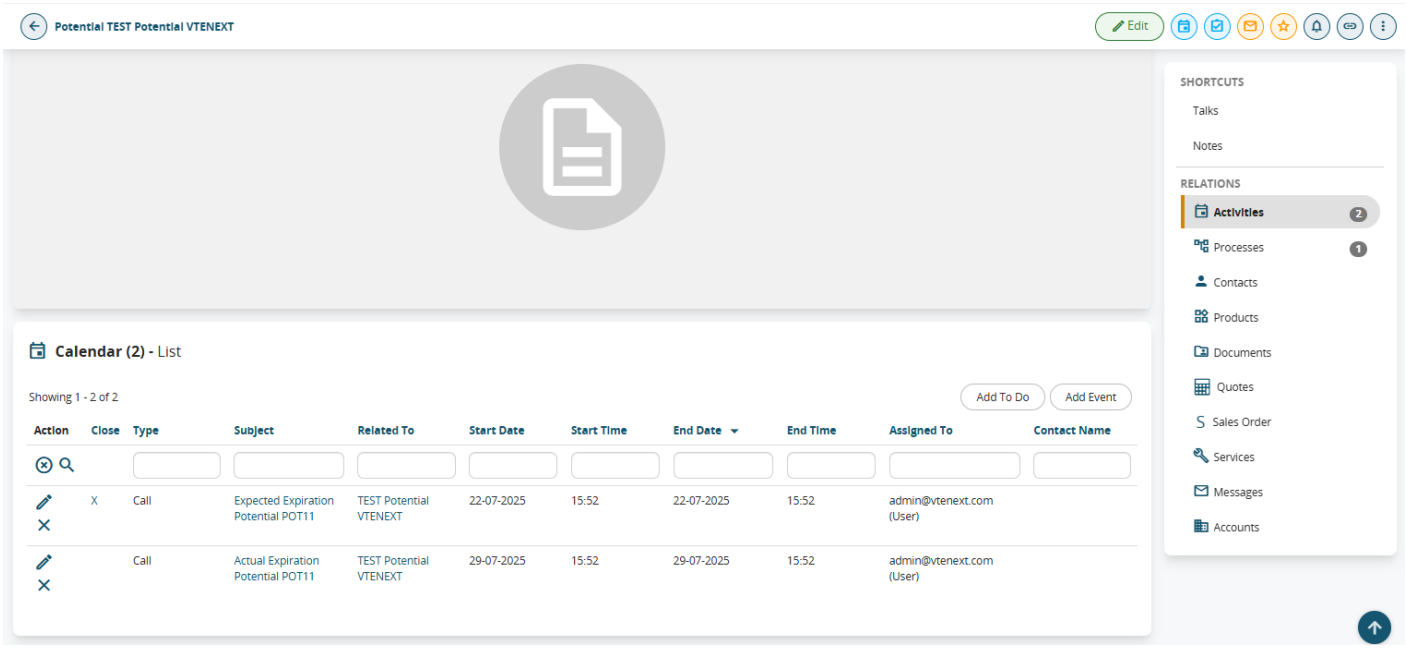
At this point we have finished configuring the process and its sub-processes. Therefore, let's proceed with checking that they are working correctly.

We then enter the creation of a New Opportunity. In this case, we set the Sales Stage to "**Open**".



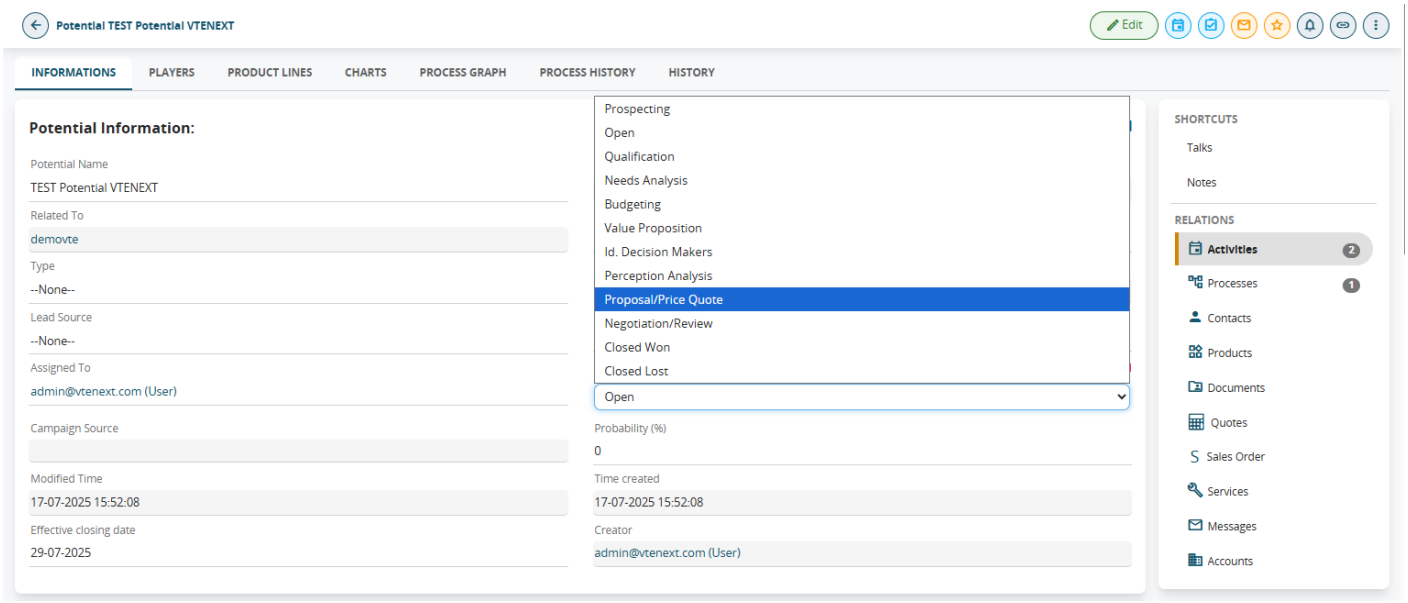
Once the Opportunity is saved, the assignee will receive an email summarizing the data.

In addition, there will already be 2 related events, namely the deadlines, one 5 days from the Expected Closing Date and the other 3 days from the Actual End Date.



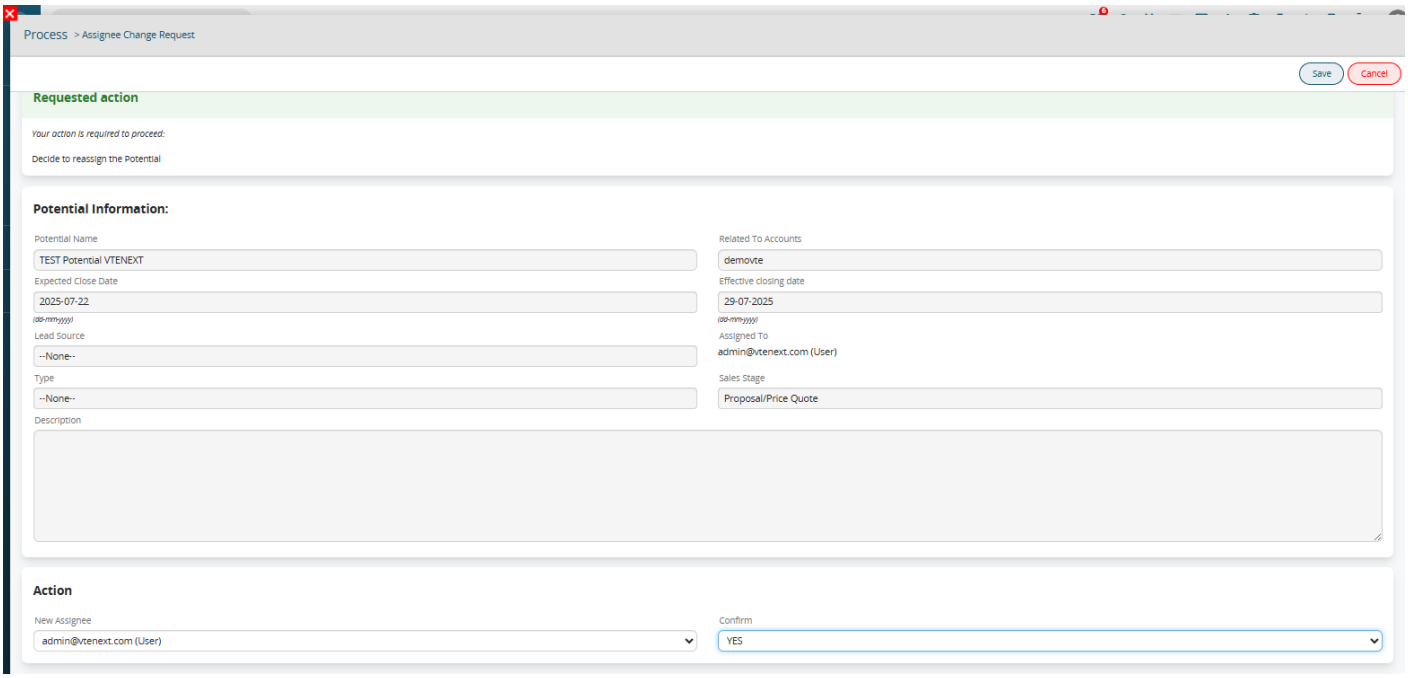
At this point the process has stopped and waits for the Sales Stage to change value to one of those previously configured.

In this case we set the value “**Quote Proposal/Price**”.



Once saved, a popup will appear to the assignee of the Opportunity with a summary of the read-only data and the possibility of reassigning it to another user.

Once the desired user has been selected, select the value “**YES**” from the picklist (you can click the “**CONFIRM/CANCEL ASSIGNMENT**” button to change the value of the same picklist to YES/NO) and proceed by clicking on **SAVE**.



Once confirmed (selected the value "**YES**" in the popup, the assignee of the Opportunity is updated and will receive an email with the data and confirmation of acceptance.

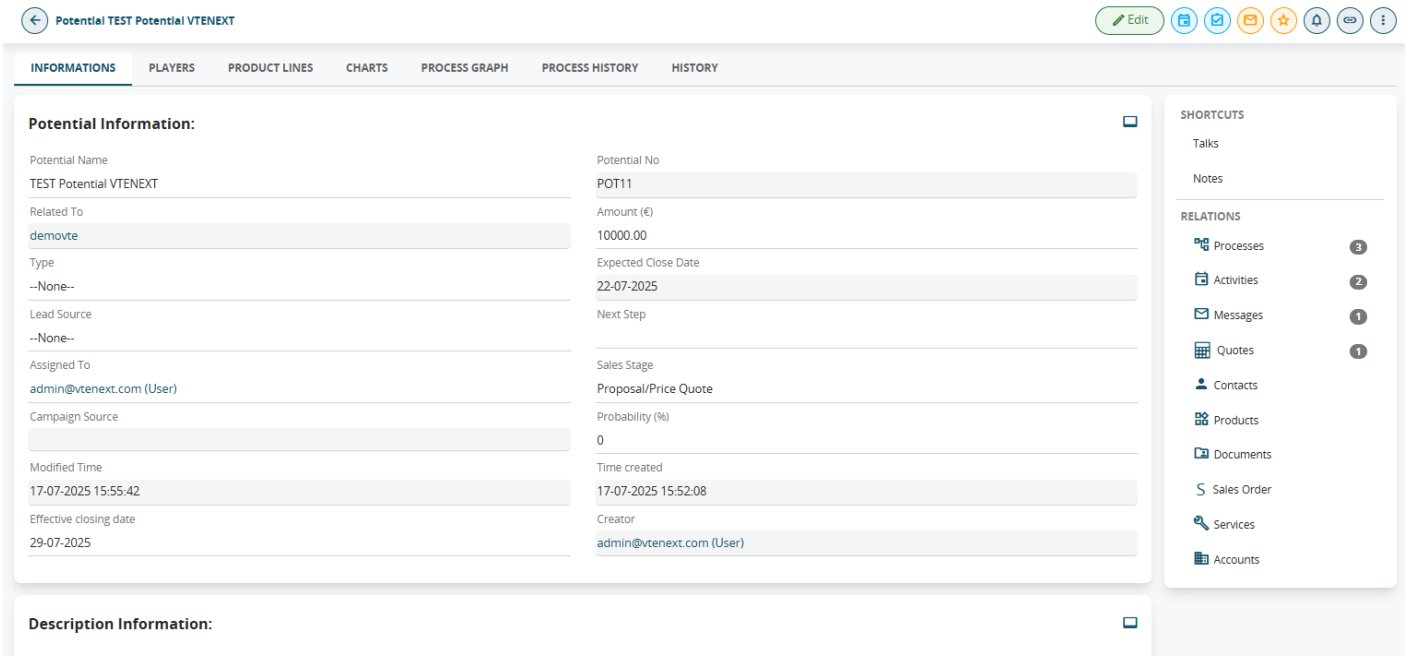
Hello User ,
this to inform you that you are the new assignee of the Potential POT11.
Listed below the main information:

Name	TEST Potential VTENEXT
Amount	10000.00
Related to	demovte
Expected closing date	2025-07-22
Type	--None--
Sales Stage	Proposal/Price Quote
Assigned to	19x12
Campaign Source	

Click on the link below to see the Potential:
https://bpmn.vtecrm.net//index.php?action=DetailView&module=Potentials&record=357

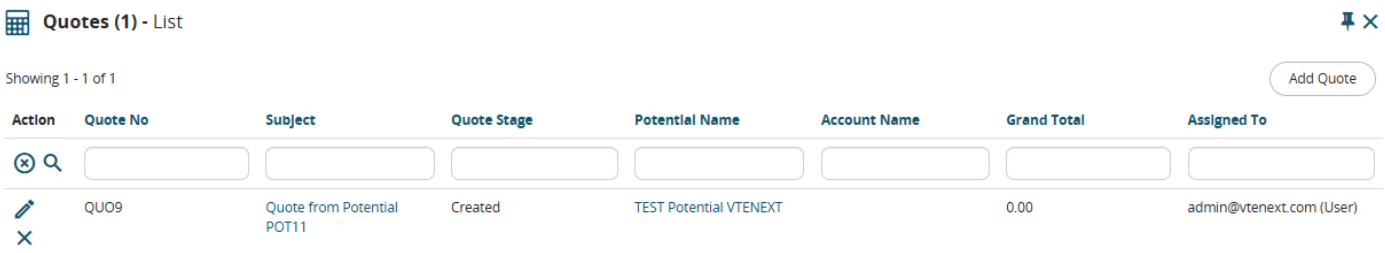
VTENEXT.

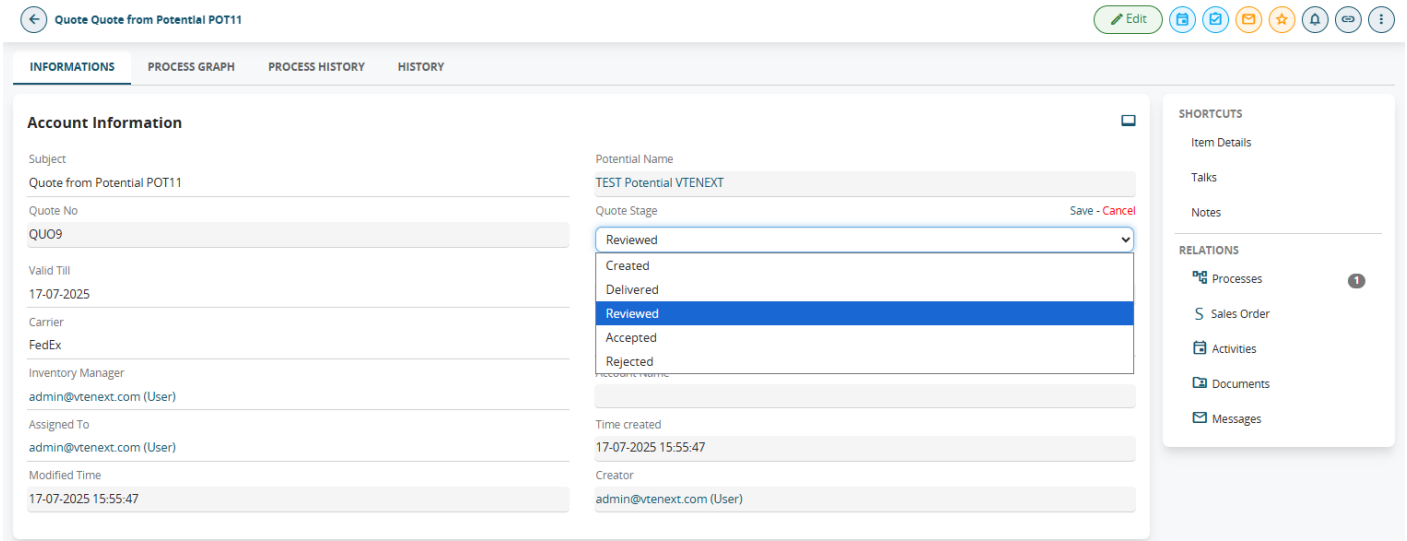
From the reports we can already see that the email has been related and the estimate has been created, as the Sales Stage was "Proposal/Estimate Price".



By analyzing the report we can see the details of the created Estimate.

At this point, we can go into detail, modify the data, insert products and change the Estimate stage to “**Revised**”.





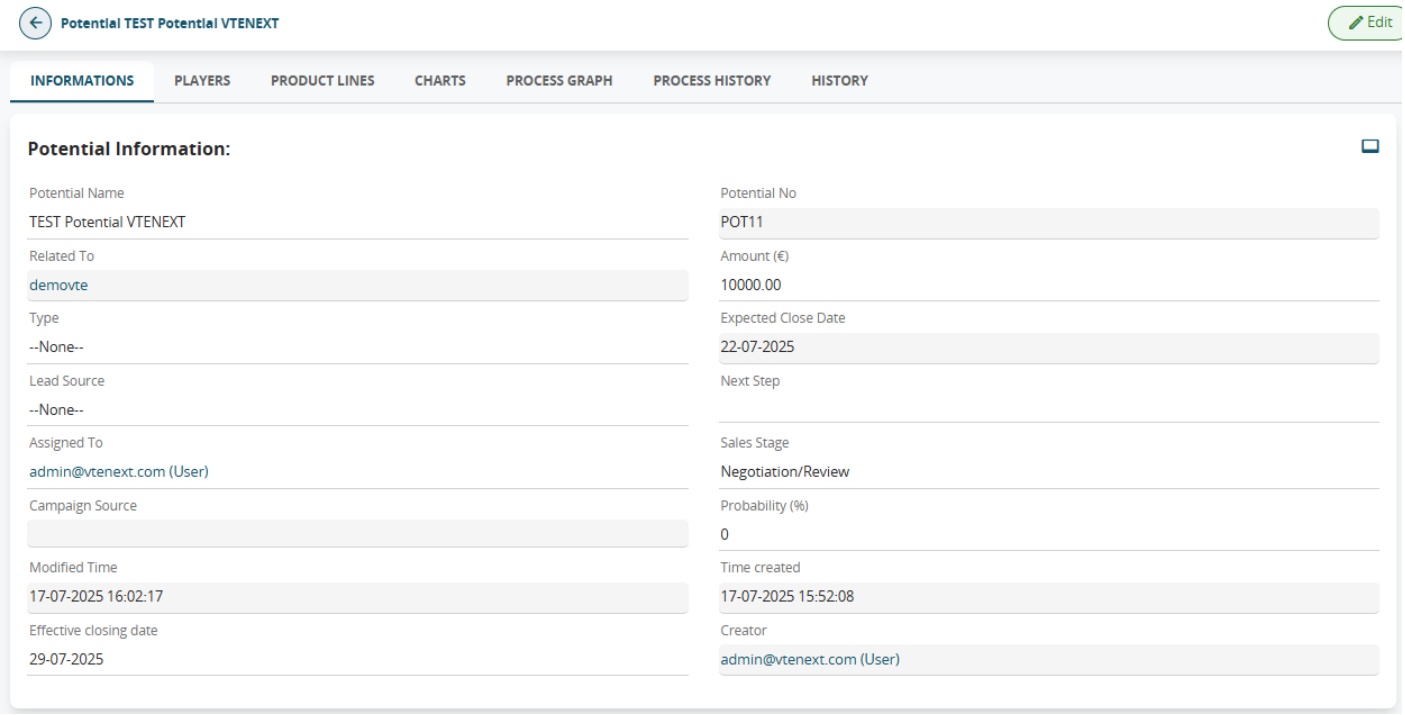
The process continues the flow and sends the email to the assignee containing the data of the Quote itself. In addition, the Sales Stage of the Opportunity is set to “**Negotiation/Review**”.

Hello,
listed below the informations of the create and accepted Quote based on the request made:

Number	QUO9
Subject	Quote from Potential POT11
Potential Name	TEST Potential VTENEXT
Quote Stage	Reviewed
Valid until	17-07-2025
Total	0.00
Grand Total	0.00

Click on the link below to see the Quote:
https://bpmn.vtecrm.net//index.php?action=DetailView&module=Quotes&record=363

VTENEXT.



At this point, the assignee receives a final summary email with all the data of the Opportunity.

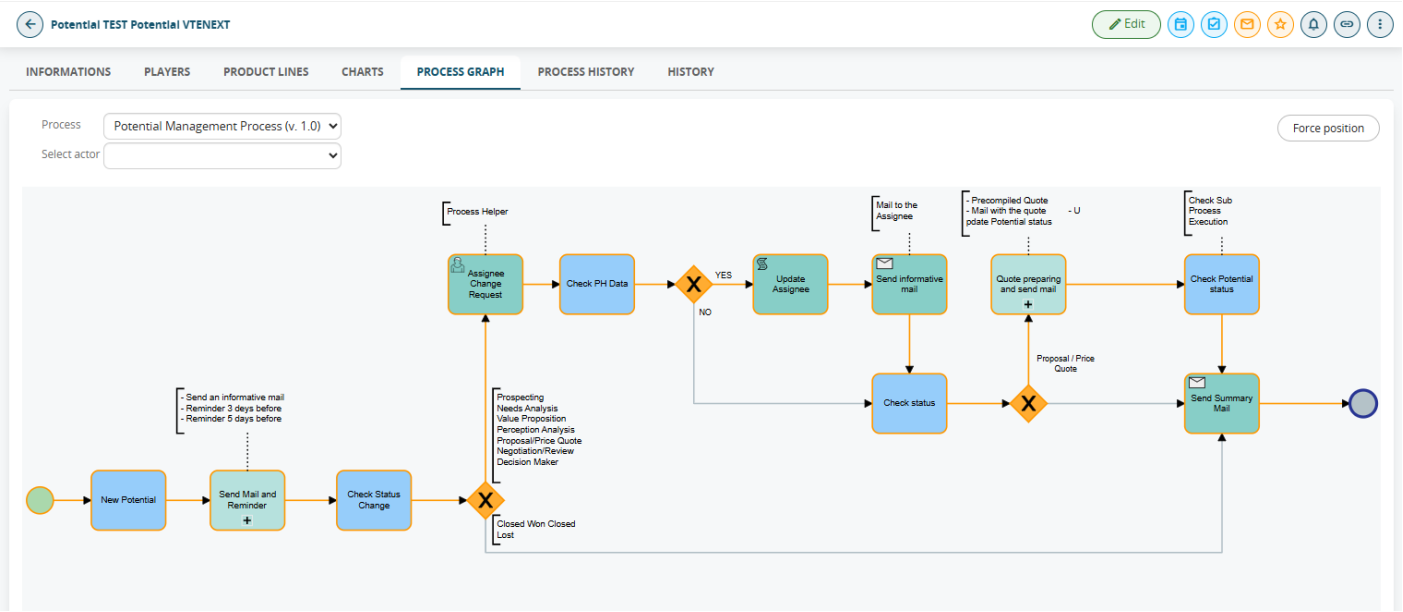
From the “**Process Graph**” tab we can see that the process has finished the execution flow.

Hello User ,
listed below the summary for the Potential POT11:

Name	TEST Potential VTENEXT
Amount	10000.00
Related to	demovte
Expected closing date	2025-07-22
Type	--None--
Sales Stage	Negotiation/Review
Assigned to	19x12
Campaign Source	

Click on the link below to see the Potential:
https://bpmn.vtecrm.net//index.php?action=DetailView&module=Potentials&record=357

VTENEXT.



Revision #4
Created 2025-05-27 14:22:33 UTC by Riccardo
Updated 2026-07-09 14:47:22 UTC by Tommaso