

# 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".

**Creating Potential** Save Cancel

**Potential Information:**

Potential Name	Potential No
TEST Potential VTENEXT	AUTO GEN ON SAVE
Related To	Amount: (€)
Accounts   demovte	10000
Type	Expected Close Date
--None--	22-07-2025
Lead Source	Next Step
--None--	
Assigned To	Sales Stage
User   admin@vtenext.com (User)	Open
Campaign Source	Probability (%)
Search...	
Effective closing date	
29-07-2025	

**Description Information:**

Description

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.

Potential TEST Potential VTENEXT

Calendar (2) - List

Showing 1 - 2 of 2

Action	Close	Type	Subject	Related To	Start Date	Start Time	End Date	End Time	Assigned To	Contact Name
	X	Call	Expected Expiration Potential POT11	TEST Potential VTENEXT	22-07-2025	15:52	22-07-2025	15:52	admin@vtenext.com (User)	
		Call	Actual Expiration Potential POT11	TEST Potential VTENEXT	29-07-2025	15:52	29-07-2025	15:52	admin@vtenext.com (User)	

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”**.

Potential TEST Potential VTENEXT

INFORMATIONS PLAYERS PRODUCT LINES CHARTS PROCESS GRAPH PROCESS HISTORY HISTORY

**Potential Information:**

Potential Name  
TEST Potential VTENEXT

Related To  
demovte

Type  
--None--

Lead Source  
--None--

Assigned To  
admin@vtenext.com (User)

Campaign Source

Modified Time  
17-07-2025 15:52:08

Effective closing date  
29-07-2025

Prospecting  
Open  
Qualification  
Needs Analysis  
Budgeting  
Value Proposition  
Id. Decision Makers  
Perception Analysis  
**Proposal/Price Quote**  
Negotiation/Review  
Closed Won  
Closed Lost

Probability (%)  
0

Time created  
17-07-2025 15:52:08

Creator  
admin@vtenext.com (User)

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**.

PROCESS > Assignee Change Request

Save Cancel

**Requested action**

Your action is required to proceed:  
Decide to reassign the Potential

**Potential Information:**

Potential Name	TEST Potential VTENEXT	Related To Accounts	demovte
Expected Close Date	2025-07-22 <small>(dd-mm-yyyy)</small>	Effective closing date	29-07-2025 <small>(dd-mm-yyyy)</small>
Lead Source	--None--	Assigned To	admin@vtenext.com (User)
Type	--None--	Sales Stage	Proposal/Price Quote
Description			

**Action**

New Assignee	Confirm
admin@vtenext.com (User)	YES

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:

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

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”.

← Potential TEST Potential VTENEXT Edit + + + + + + +

**INFORMATIONS** PLAYERS PRODUCT LINES CHARTS PROCESS GRAPH PROCESS HISTORY HISTORY

**Potential Information:**

Potential Name	Potential No
TEST Potential VTENEXT	POT11
Related To	Amount (€)
demovte	10000.00
Type	Expected Close Date
--None--	22-07-2025
Lead Source	Next Step
--None--	
Assigned To	Sales Stage
admin@vtenext.com (User)	Proposal/Price Quote
Campaign Source	Probability (%)
	0
Modified Time	Time created
17-07-2025 15:55:42	17-07-2025 15:52:08
Effective closing date	Creator
29-07-2025	admin@vtenext.com (User)

**Description Information:**

**SHORTCUTS**

- Talks
- Notes

**RELATIONS**

- Processes 3
- Activities 2
- Messages 1
- Quotes 1
- Contacts
- Products
- Documents
- Sales Order
- Services
- Accounts

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”**.

**Quotes (1) - List**

Showing 1 - 1 of 1

Add Quote

Action	Quote No	Subject	Quote Stage	Potential Name	Account Name	Grand Total	Assigned To
	QUO9	Quote from Potential POT11	Created	TEST Potential VTENEXT		0.00	admin@vtenext.com (User)

← Quote Quote from Potential POT11 Edit + + + + + +

**INFORMATIONS** PROCESS GRAPH PROCESS HISTORY HISTORY

**Account Information:**

Subject	Potential Name
Quote from Potential POT11	TEST Potential VTENEXT
Quote No	Quote Stage
QUO9	<div style="border: 1px solid #ccc; padding: 2px;"> <span>Reviewed</span> </div>
Valid Till	Created
17-07-2025	Delivered
Carrier	Reviewed
FedEx	Accepted
Inventory Manager	Rejected
admin@vtenext.com (User)	Time created
Assigned To	17-07-2025 15:55:47
admin@vtenext.com (User)	Creator
Modified Time	admin@vtenext.com (User)
17-07-2025 15:55:47	

**SHORTCUTS**

- Item Details
- Talks
- Notes

**RELATIONS**

- Processes 1
- Sales Order
- Activities
- Documents
- Messages

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:

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

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

VTENEXT.

← Potential TEST Potential VTENEXT Edit

**INFORMATIONS** PLAYERS PRODUCT LINES CHARTS PROCESS GRAPH PROCESS HISTORY HISTORY

**Potential Information:**

Potential Name	Potential No
TEST Potential VTENEXT	POT11
Related To	Amount (€)
demovte	10000.00
Type	Expected Close Date
--None--	22-07-2025
Lead Source	Next Step
--None--	
Assigned To	Sales Stage
admin@vtenext.com (User)	Negotiation/Review
Campaign Source	Probability (%)
	0
Modified Time	Time created
17-07-2025 16:02:17	17-07-2025 15:52:08
Effective closing date	Creator
29-07-2025	admin@vtenext.com (User)

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

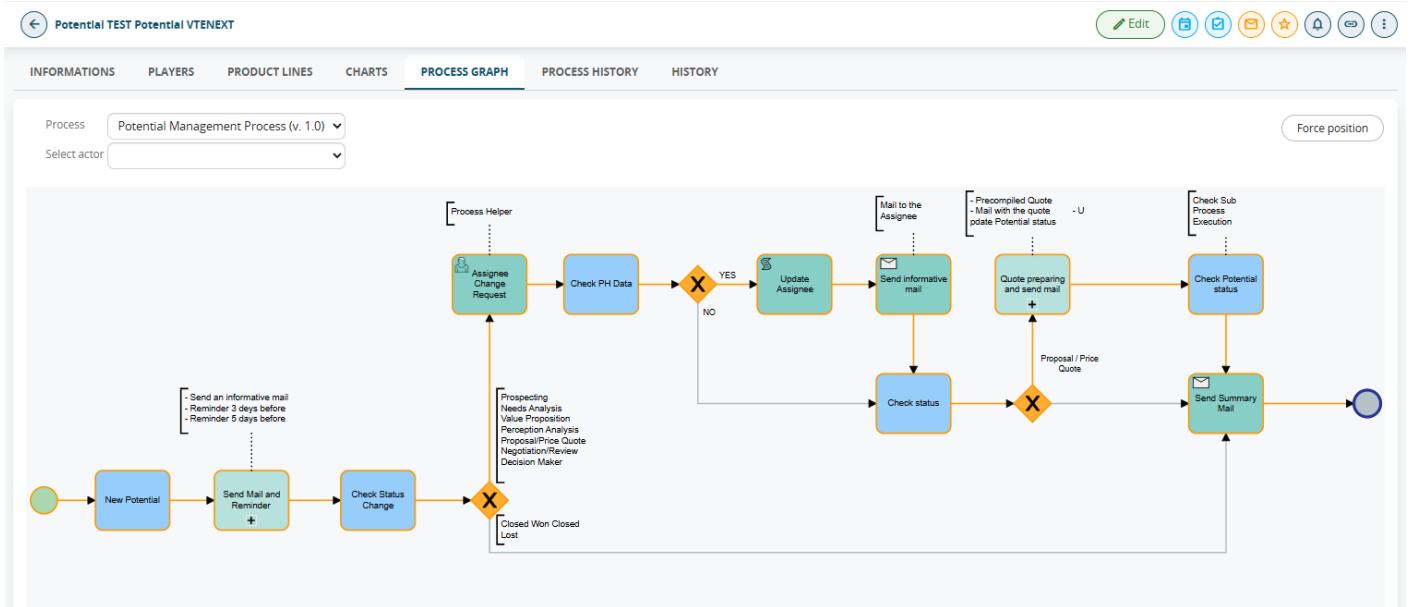
From the **“Process Graph”** tab we can see that the process has finished the execution flow.

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

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

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