

Advanced Process Activation

- LEAD MANAGEMENT



Once enabled we run a check, we go to the Lead module and we create a new one. As pictured below, to enter the process is necessary to respect all the conditions. Here it is foregone since the initial condition is the Surname field not to be empty (which is also a mandatory field).

Once the lead is saved the process will begin.

Creating Lead

SAVE

CANCEL

Lead Information	
First Name	Lead No
Mr. ▼ James	AUTO GEN ON SAVE
Last Name	Phone
Taylor	0223659854
Company	Mobile
learnkop	
Title	Fax
Lead Source	Email
Employee	▼ james.taylor@learnkop.com
Industry	Website
Utilities	▼ http://
Annual Revenue: (€)	Lead Status
	--None-- ▼
No Of Employees	Rating
	--None-- ▼
Assigned To	
User ▼	admin (User Administrator)  

The process starts and the first pop up will appear the admin user has to decide if the Lead has to be reassigned or not.

To reassign the record select the desired user and then flag the “Reassign?” box.

Process > re-assignment_lead

SAVE CANCEL

A new Lead is been assigned to you

Lead Assignment

Lead FirstName	James	Lead LastName	Taylor
Lead Company	learnkop	email	james.taylor@learnkop.com
Lead Source	Employee	Lead Status	--None--
Assigned To	admin (User Administrator) <input type="checkbox"/>		

Once the assignee is decided an email containing all the relevant information will be sent.

Dear User Administrator
The Lead James Taylor learnkop is been assigned to you.

Helpful information:

Check the record at the follow link:
http://192.168.1.89/vte1802_1642/index.php?action=DetailView

We now go on with the following Task, that will check the Lead's status.
Some fields of the record, like Name, Surname and Lead Number are set in "read only" mode.
Now, if the Lead status is different from "Not Contacted", the process will take the path that creates a remind event.

Here below you can see the changing of the status.

[←](#) Lead Taylor James Updated today (05 Mar 2018)

EDIT

Informations Process Graph History

Lead Information

First Name	Lead No
Mr. James	LEA49
Last Name	Phone
Taylor	<div style="border: 1px solid #ccc; padding: 5px;"> --None-- Attempted to Contact Cold Contact in Future Contacted Hot Junk Lead Lost Lead Not Contacted Pre Qualified Qualified Warm --None-- </div>
Company	
learnkop	
Title	
Lead Source	
Employee	
Industry	
Utilities	
Annual Revenue (€)	
0.00	
No Of Employees	
0	

Relations

- Processes 1
- Activities
- Documents
- Products
- Campaigns
- Trouble Tickets
- Sms
- Services
- More

Later a pop up, to set all the data regarding the reminder event, will appear. Among those data we can find Date, Time and Name (of the reminder).

Process > re-assignment_lead

SAVE

CANCEL

A new Lead is been assigned to you

Reminder Information

Start Date

05-03-2018

(dd-mm-yyyy)

Start Time

09:00

Subject

Check Lead Data

End Date

05-03-2018

(dd-mm-yyyy)

End Time

18:00

Once saved, in the Calendar an event with the given information will appear. Clicking on it, it will be possible to display all the related information.

	DAY	WEEK	MONTH	LIST	GEOLOCALIZATION	+ CREATE	⚙	TODAY	←
	Mon 3/5	Tue 3/6	Wed 3/7	Thu 3/8	Fri 3/9	Sat 3/10			
Show Completed To Do									
08:00									
09:00	09:00 - 18:00 Check Lead Data								
10:00									
11:00									
12:00									
13:00									
14:00									
15:00									
16:00									
17:00									

Clicking on the event box all the details will be shown.
 When the status will switch to “Held”, the process will follow the flow.

Event Check Lead Data

Activity Type

Call

Visibility

Standard

Subject

Check Lead Data

Description

Start Date & Time

05-03-2018 09:00

End Date

05-03-2018 18:00

Location

Status

Held

Save - Cancel

Assigned To

admin (User Administrator)

Priority

High

Time created

05-03-2018 13:56:43

Modified Time

05-03-2018 13:56:43

DETAILS

EDIT

CLOSE ACTIVITY

DELETE

Related To

Invite

Reminder

Repeat

Related to

Taylor James

Contact Name

Once the status is on “Held” the Lead will be inserted in the Target previously set in the Related List. Clicking here it is possible to display all the details.

Lead Taylor James Aggiornato Oggi (05 Mar 2018)

MODIFICA

Ritorna alla lista | Informazioni | Grafico processo | Storico

Informazioni Lead

Nome	Numero Lead
Sig. James	LEA42
Cognome	Telefono
Taylor	0223659854
Società	Cellulare
learnkop	
Titolo	Fax
Fonte Lead	Email
Dipendente	james.taylor@learnkop.com
Settore	Sito Web
Utilità	
Fatturato (€)	Stato Lead

Relazioni

- Processi 1
- Target 1
- Attività 1
- Documenti
- Prodotti
- Campagne
- Assistenza Clienti
- Sms

From the Process Chart (Process Graph tab), it is possible to note that the process will be put on hold for 5 days, before checking if the Lead description has been filled or not.



If the Description field is filled within 5 days the process ends, because the Lead has been managed by the user in charge. If not the process will take a different path.



The other path of the Gateway contemplates the sending of a reminder email, like the one below:

Dear User Administrator
The Lead James Taylor learnkop is still not managed.

Helpful Information:

Check the record at the follow link:

http://192.168.1.89/vte1802_1642/index.php?action=DetailView&module=Leads&record=454

After that, the dynamic forms will be reset and the event of remind deleted, since the process will restart with a new

reassignment and so with other possible reminder.

Now the admin user has to decide whether to reassign the Lead or to manage it.

If the lead is reassigned and its status becomes "Not Contacted", the process will follow a different path, where the admin user will be informed of the situation.

Lead Taylor James Updated today (05 Mar 2018)

EDIT

Informations

Process Graph

History

Lead Information

First Name	Lead No
Mr. James	LEA50
Last Name	Phone
Taylor	0223659854
Company	Mobile
learnkop	
Title	Fax
Lead Source	Email
Employee	james.taylor@learnkop.com
Industry	Website
Utilities	
Annual Revenue (€)	Lead Status
0.00	Not Contacted
	Save - Cancel
No Of Employees	Rating

Relations

Processes	1
Targets	1
Activities	
Documents	
Products	
Campaigns	
Trouble Tickets	
Sms	
More	

In the pop up below the admin user will confirm the situation and then an email will be sent to the assignee of the record.

Process > re-assignment_lead

SAVE CANCEL

Un Nuovo Lead è stato assegnato a te

Lead Information

Lead FirstName	Lead LastName
James	Taylor
Company	Description
learnkop	
Confirm	
<input checked="" type="checkbox"/>	

Next mail

Dear User Administrator
The Lead James Taylor learnkop is not Contacted yet.

Helpful Information:

Check the record at the follow link:
http://192.168.1.89/vte1802_1642/index.php?action=D&

At this point the process ends.

Among the new features:

1 - Tab fields



2 - Newsletter sending



Newsletter

3 - Settings external web services



Revision #11

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