

# 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

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**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)	Re-Assigned?	<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](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

Information Process Graph History

**Lead Information**

First Name <b>Mr. James</b>	Lead No <b>LEA49</b>
Last Name <b>Taylor</b>	Phone --None--
Company <b>learnkop</b>	Attempted to Contact
Title	Cold
Lead Source <b>Employee</b>	<b>Contact in Future</b>
Industry <b>Utilities</b>	Contacted
Annual Revenue (€) <b>0.00</b>	Hot
No Of Employees <b>0</b>	Junk Lead
	Lost Lead
	Not Contacted
	Pre Qualified
	Qualified
	Warm
	--None--
	Rating --None--

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

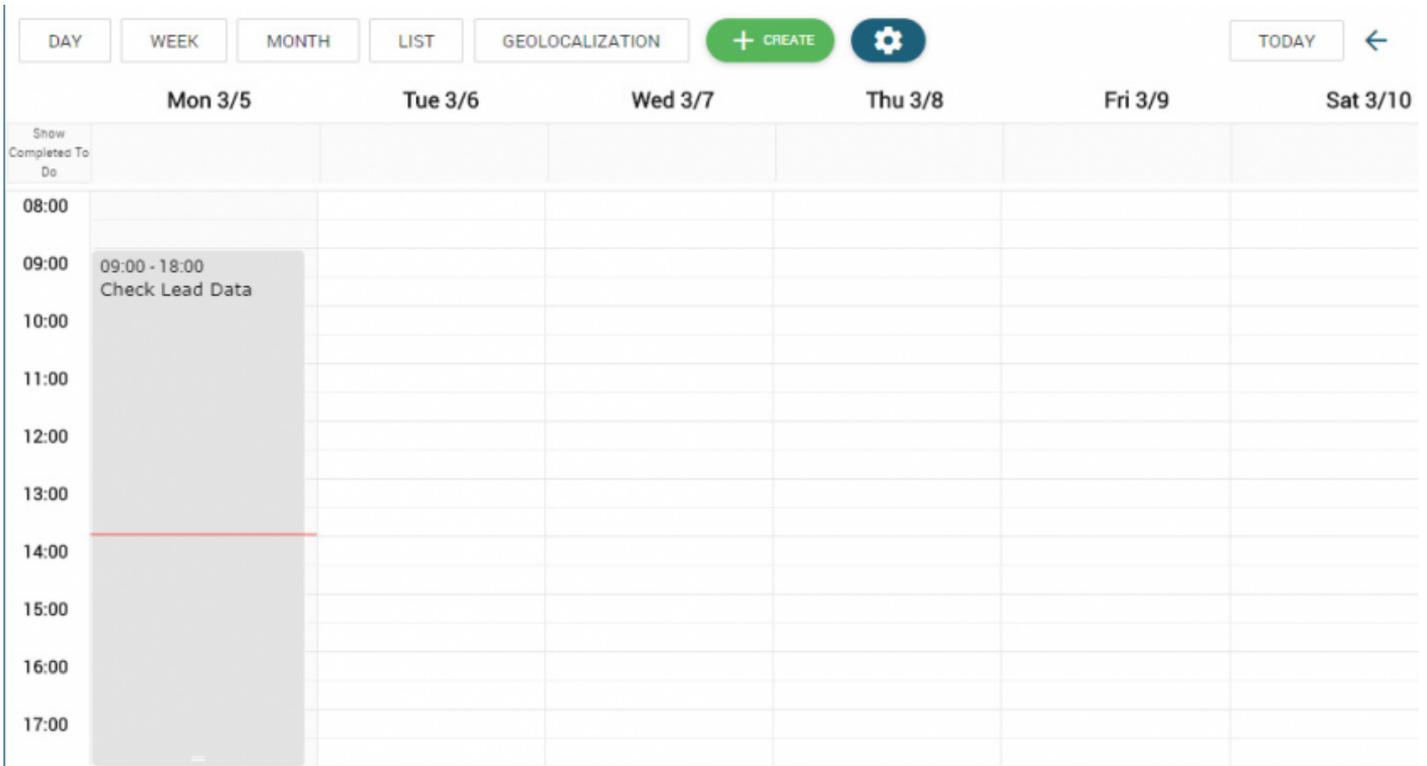
SAVE CANCEL

A new Lead is been assigned to you

**Reminder Information**

Start Date 05-03-2018	End Date 05-03-2018
(dd-mm-yyyy)	(dd-mm-yyyy)
Start Time 09:00	End Time 18:00
Subject Check Lead Data	

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.



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**

DETAILS
EDIT
CLOSE ACTIVITY
DELETE

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Activity Type: Call      Visibility: Standard

Subject: Check Lead Data

Description:

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Start Date & Time: 05-03-2018 09:00      End Date: 05-03-2018 18:00

Location:

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Status: Save - Cancel

**Held** ▼

Assigned To: admin (User Administrator)

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Priority: High      Time created: 05-03-2018 13:56:43

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Modified Time: 05-03-2018 13:56:43

Related To
Invite
Reminder
Repeat

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**Related to** Taylor James

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**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)

Ritorna alla lista | Informazioni | Grafico processo | Storico

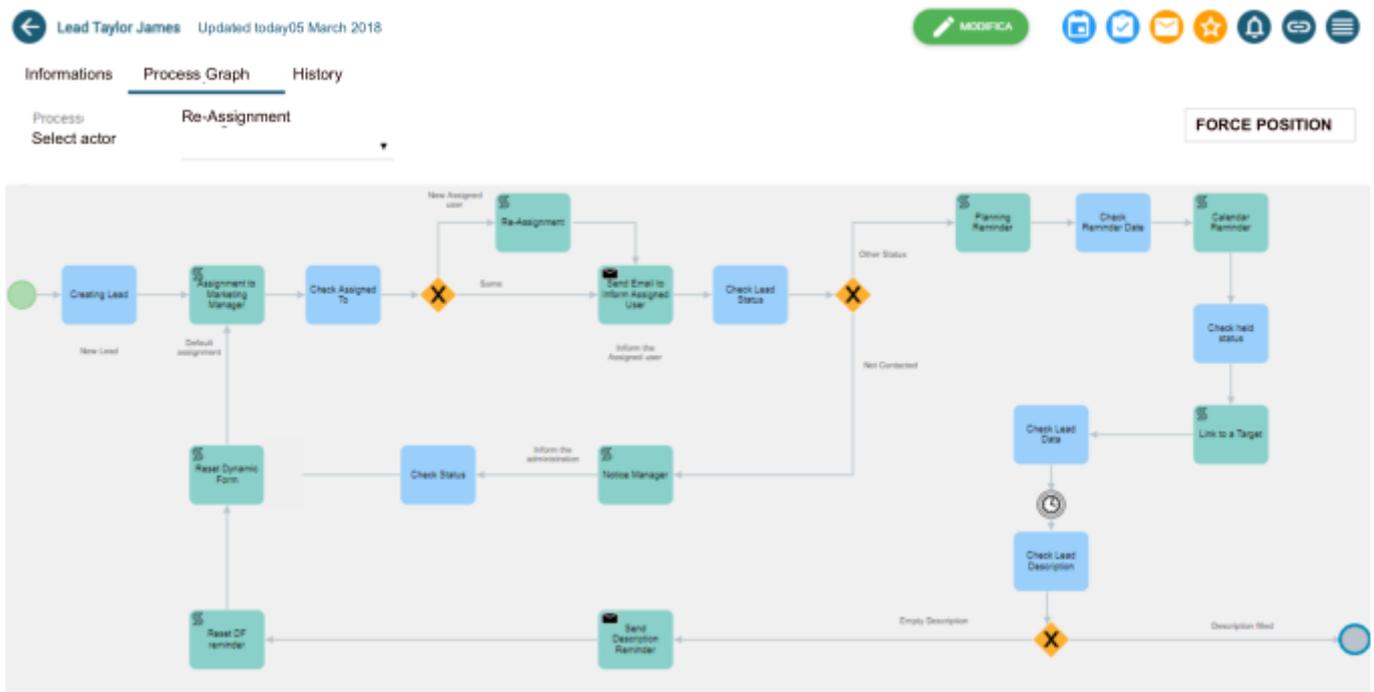
MODIFICA

Relazioni

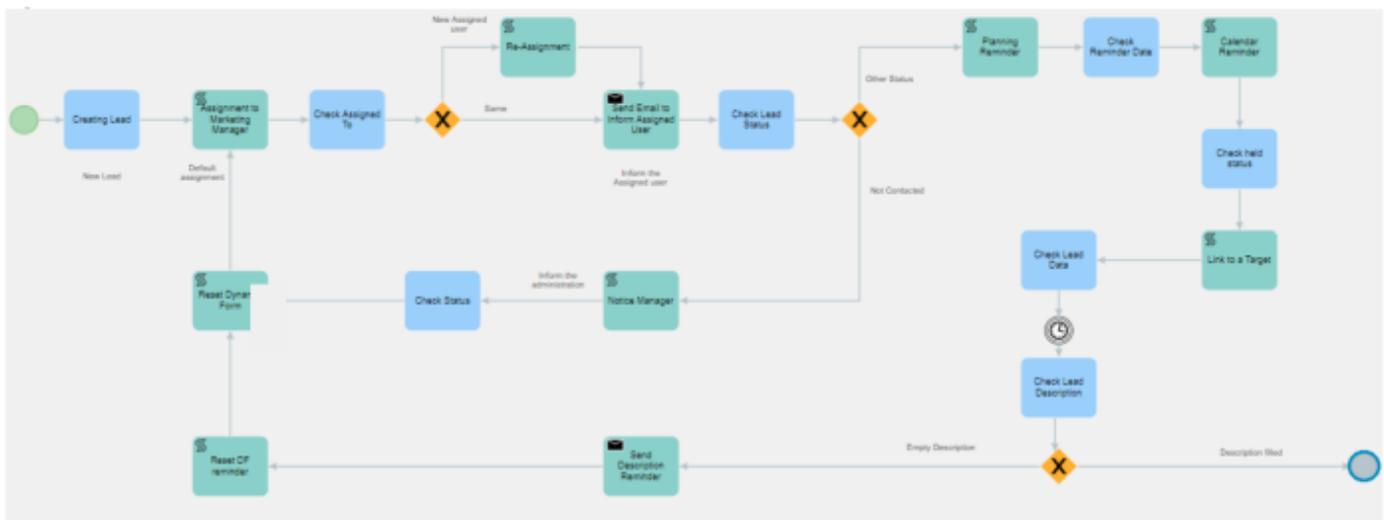
- Processi 1
- Target 1
- Attività 1
- Documenti
- Prodotti
- Campagne
- Assistenza Clienti
- Sms

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

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

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 James	Lead LastName Taylor
Company learnkop	Description
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&](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**



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Revision #11

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