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.

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.

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

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.

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).

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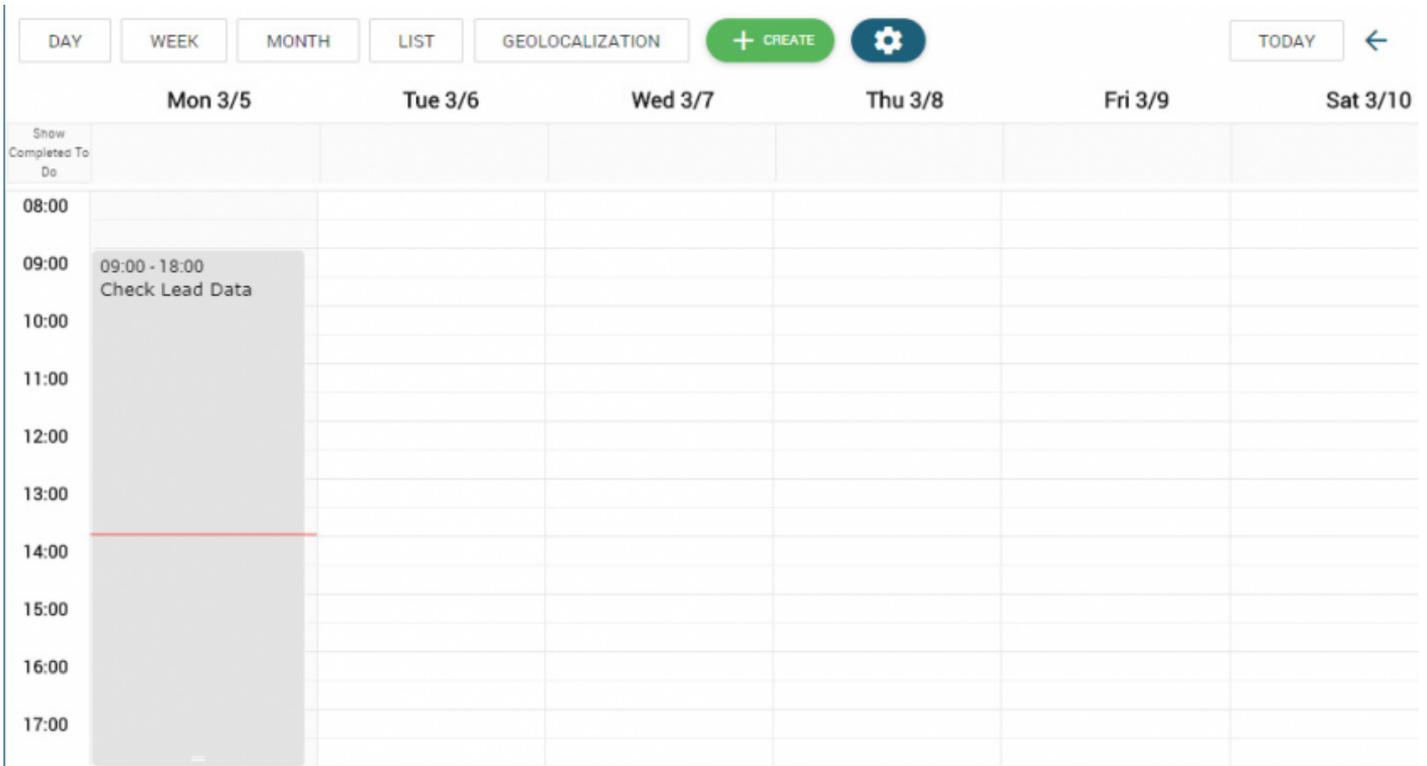
Clicking on the event box all the details will be shown.
When the status will switch to "Held", the process will follow the flow.

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.

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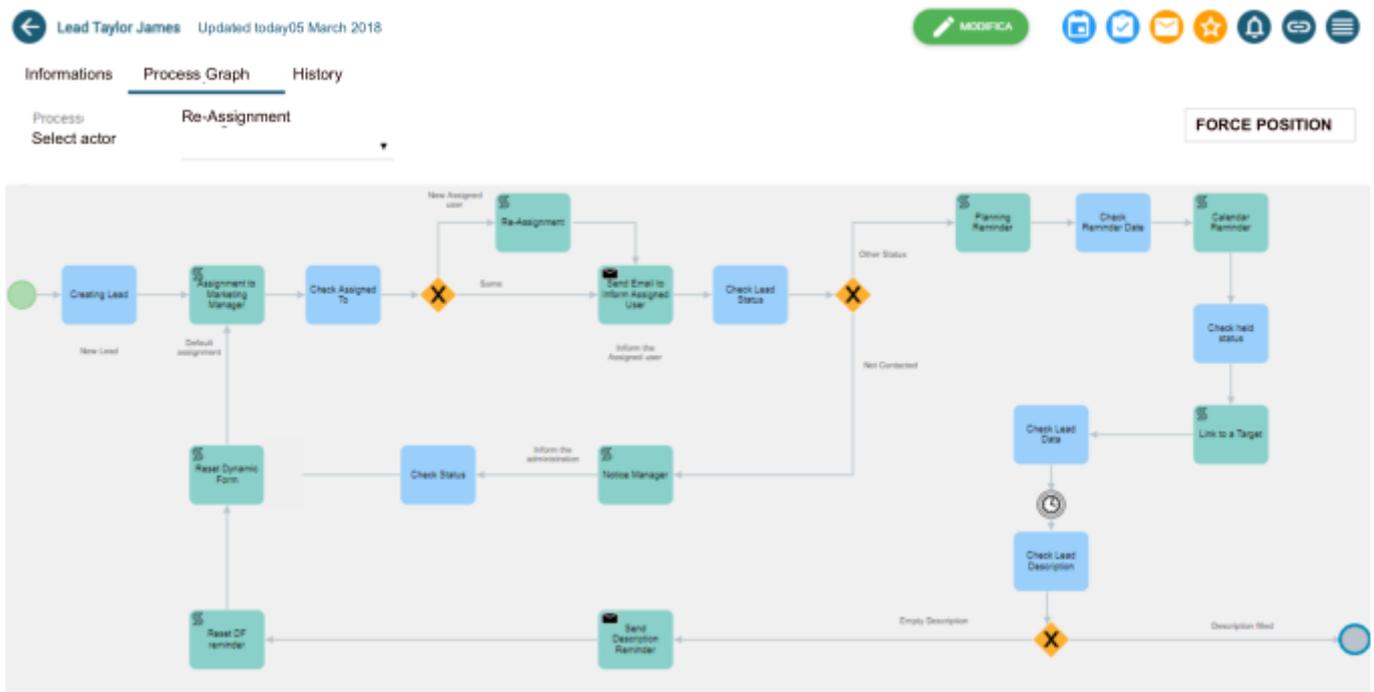
If the Description field is filled within 5 days the process ends, because the Lead has been managed by the user in charge. If not the process will take a different path.

Informations   Process Graph   History

Process: Re-Assignment
Select actor

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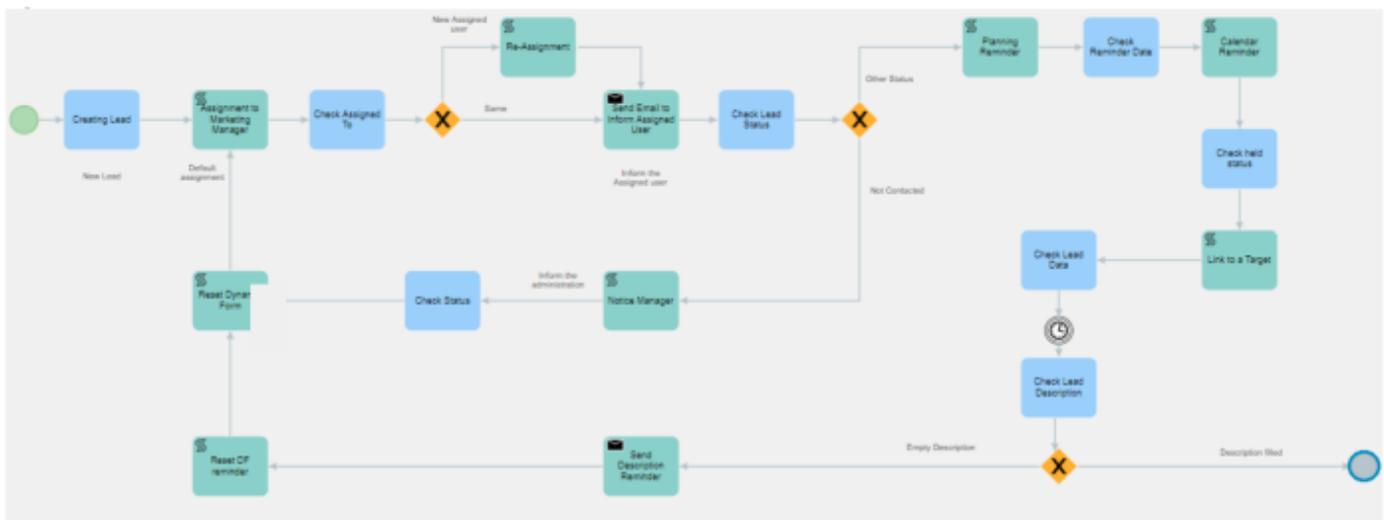
The other path of the Gateway contemplates the sending of a reminder email, like the one below:

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.

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.

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=De

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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