

Basic Process Activation

PROCESS ACTIVATION

We proceed by creating a new company record.

The Rating field, in this case, is set on Active, therefore a new potential should be created.

Creating Account

SAVECANCEL

Account Information	
Account Name LearnKop	Account No AUTO GEN ON SAVE
Website http:// www.learnkop.com	Phone 02214785239
Fax 02214785239	Member Of Search...
Phone (other)	Employees 24
Email infolearnkop@administration.com	email (other)
Ownership	Industry Utilities
Rating Active	Type Customer
Lock Automatic Emails <input type="checkbox"/>	Annual Revenue: (€)
Bank Details	VAT Registration Number

Once the record is saved we should find a New Potential related to the company itself, containing the name and data inserted in the related configuration. Here below we can see the details:

Account LearnKop Updated today (05 Mar 2018)

EDIT

Informations Process Graph History

Account Information

Account Name LearnKop	Account No ACC12
Website www.learnkop.com	Phone 02214785239
Fax 02214785239	Member Of
Phone (other)	Employees 24
Email infolearnkop@administration.com	email (other)
Ownership	Industry Utilities
Rating Active	Type Customer

Relations

Processes 1

Potentials 1

Contacts

Quotes

S Sales Order

Invoice

Activities

Documents

More

Account LearnKop Updated today (05 Mar 2018)

EDIT

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Showing 1 - 1 of 1

ADD POTENTIAL

Action	Potential	Related To	Sales Stage	Amount (In €)	Expected Close Date	Assigned To
	LearnKop Potential	LearnKop	Budgeting	0.00	05-03-2018	admin (User Administrator)

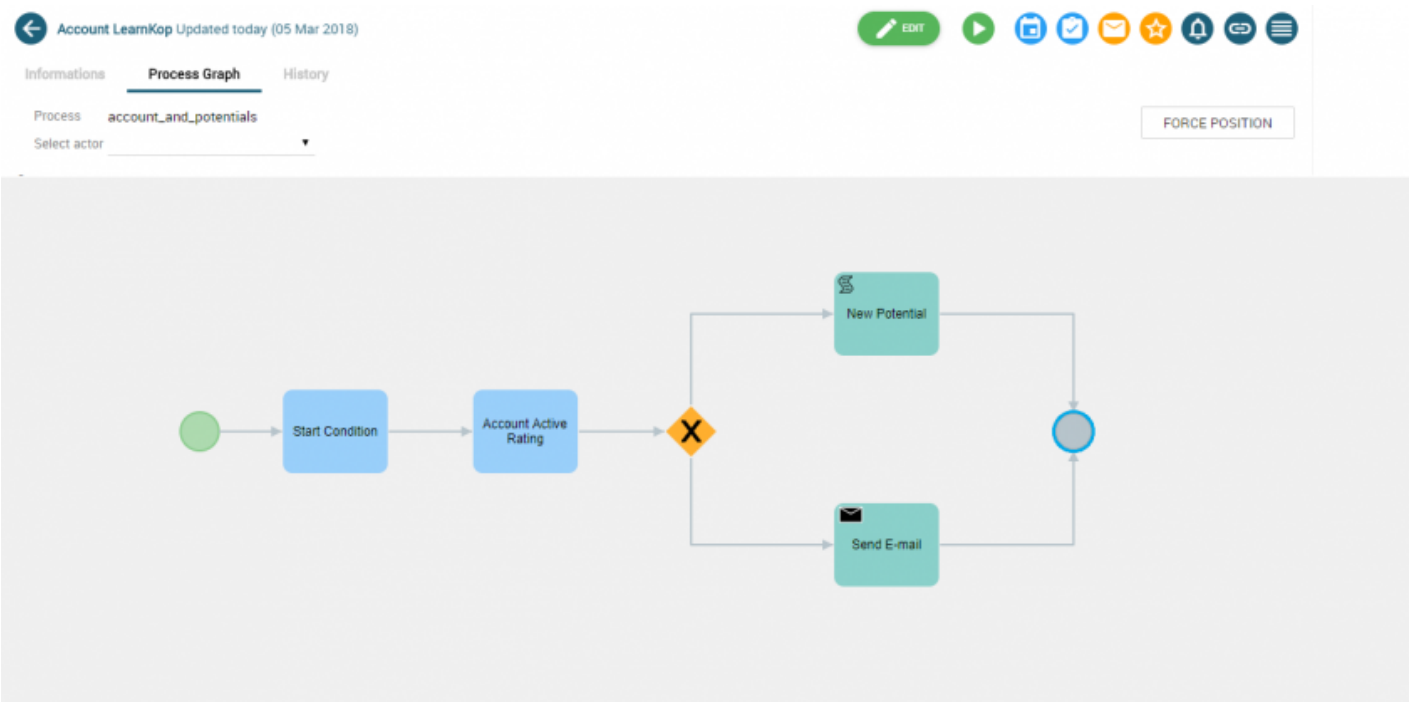
Processes 1

Potentials 1

Contacts

The process ended its flow.

We can notice this also by clicking on the tab “Process Graph” of the created company. Looking at the graph we can define which path took the flow and where it stopped. In this case the highlighted point, that is where the process stopped, is the End Event.



If the Rating field wasn’t active a recap email would have been sent to the email address reported in the module (Email field) and to the assignee of the record. Here below you can find an example:

Dear User Administrator
A new Account has been created.

Account Info:


Name	LearnKop
Nr.	ACC13
Phone	02214785239
Website	www.learnkop.com
E-mail	infolearnkop@administration.com
Rating	Acquisito
Type	Azienda
Assigned To	admin

Best Regards,

Administration

PROCESS ACTIVATION - End of Support Service

The process start when the service record is modified ticking the box “End Support” to the value “yes”.

 Service Cloud server Istallation and setup

Informations

Process Graph

Process History

History

Service Information

Service Name

Cloud server istallation and setup

Usage Unit

Days

No of Units

0

Category

Support

Sales Start Date

05-08-2019

Support Start Date

05-08-2019

Time created

11-08-2021 10:44:17

Creator

Service No

SER10

Active

yes

Website

Assigned To

Sales End Date

11-08-2025

Support Expiry Date

03-08-2021

Modified Time

23-08-2021 15:31:27

End of Support

yes

Once the record will be saved the following pop-up will appear to the assignee of that service:

Requested action

Check the End Support box if you want to confirm the ending of the support for Cloud server installation and setup.

Service Support

End of Support

no
--Please select--
yes
no

Support end date

(dd-mm-yyyy)

This pop-up will ask to the assignee of the service if he/she wants to extend the support end date. Through the drop-down menu the assignee will choose one the following options:



1. No – unticked End of support box to confirm the end of the support.
2. Yes – ticked End of support box to extend the duration of the service support



1. NO - unticked End of Support box

The expiry date is confirmed by the assignee of the service. In this scenario all the contacts related to that service will be alerted with an email.

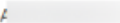
Service support deadline has been reached

Monday 23-08-2021 15:19:05

[Translate message](#)[Details](#) -  

 Info@service.it
To: 

 455435

Dear  we sent the present email to report that your service support linked to Cloud server installation and setup has expired.
If you want to extend the service support please reply to this email.

Admin.

 Talk

Start a new talk

2. Yes - ticked End of Support box

The expiry date will change according to the one chosen by the assignee

SAVE

CANCEL

Requested action

Check the End Support box if you want to confirm the ending of the support for Cloud server installation and setup.

Service Support

End of Support

no

Support end date

29-08-2021



(dd-mm-yyyy)

In this case, after saving the record will be updated with the new end support date provided by the assignee

Service Cloud server Installation and setup

Informations

Process Graph

Process History

History

Service Information

Service Name

Cloud server installation and setup

Usage Unit

Days

No of Units

0

Category

Support

Sales Start Date

05-08-2019

Support Start Date

05-08-2019

Time created

11-08-2021 10:44:17

Creator

Service No

SER10

Active

yes

Website

Assigned To

Sales End Date

11-08-2025

Support Expiry Date

29-08-2021

Modified Time

23-08-2021 15:26:38

End of Support

yes

Revision #4

Created 2 November 2019 11:29:52

Updated 23 August 2021 13:34:48 by Alberto