

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 SAVE CANCEL

Account Information

Account Name	Account No
LearnKop	AUTO GEN ON SAVE
Website	Phone
http:// www.learnkop.com	02214785239
Fax	Member Of
02214785239	Search...  
Phone (other)	Employees
	24
Email	email (other)
infolearnkop@administration.com	
Ownership	Industry
	Utilities 
Rating	Type
Active	Customer 
Lock Automatic Emails	Annual Revenue: (€)
<input type="checkbox"/>	
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	Account No
LearnKop	ACC12
Website	Phone
www.learnkop.com	02214785239
Fax	Member Of
02214785239	
Phone (other)	Employees
	24
Email	email (other)
infolearnkop@administration.com	
Ownership	Industry
	Utilities
Rating	Type
Active	Customer

Relations

-  Processes 1
-  Potentials 1
-  Contacts
-  Quotes
-  Sales Order
-  Invoice
-  Activities
-  Documents
- More

Account LearnKop Updated today (05 Mar 2018)

Showing 1 - 1 of 1

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)

ADD POTENTIAL

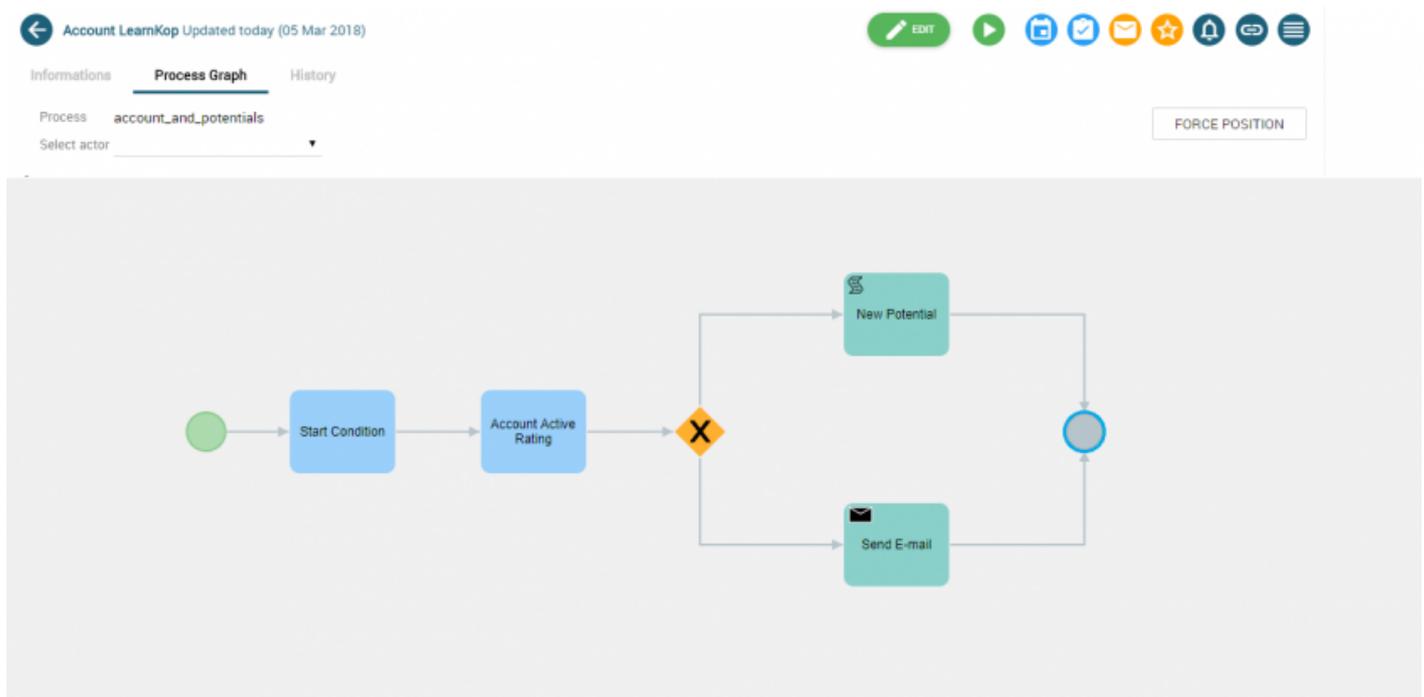
Processes 1

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 Installation and setup

Informations Process Graph Process History History

Service Information □

Service Name Cloud server installation and setup	Service No SER10
Usage Unit Days	Active yes
No of Units 0	Website
Category Support	Assigned To
Sales Start Date 05-08-2019	Sales End Date 11-08-2025
Support Start Date 05-08-2019	Support Expiry Date 03-08-2021
Time created 11-08-2021 10:44:17	Modified Time 23-08-2021 15:31:27
Creator	End of Support yes

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

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

--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 of 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

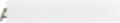
1. NO - unticked End of Support box

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

Details -  [Translate message](#) Info@service.it 455435To: 

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**2. Yes - ticked End of Support box**

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

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