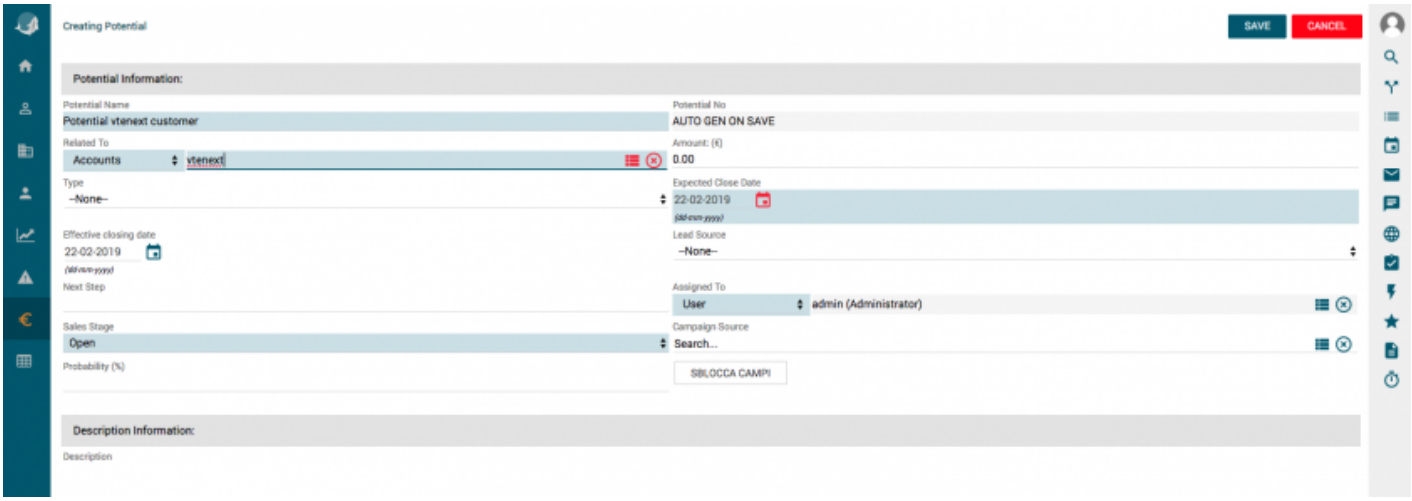
Process Activation - POTENTIAL MANAGEMENT

PROCESS ACTIVATION

At this point we completed the configuration of the process and sub processes. Therefore we proceed by checking the proper running of the process.

Now we create a new Potential.

In this case we set the Sales Status on **“Open”**.



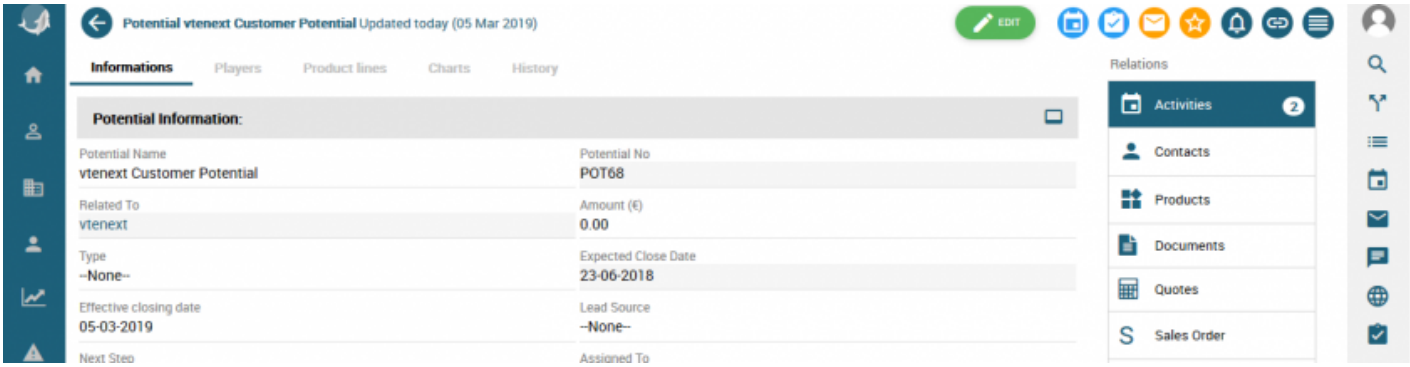
Once the Potential is saved the Assignee will receive a mail containing a summary of the data. In addition, there will already be 2 related events, ie deadlines, one to 5 days from the expected closing date and the other to 3 days from the effective end date.

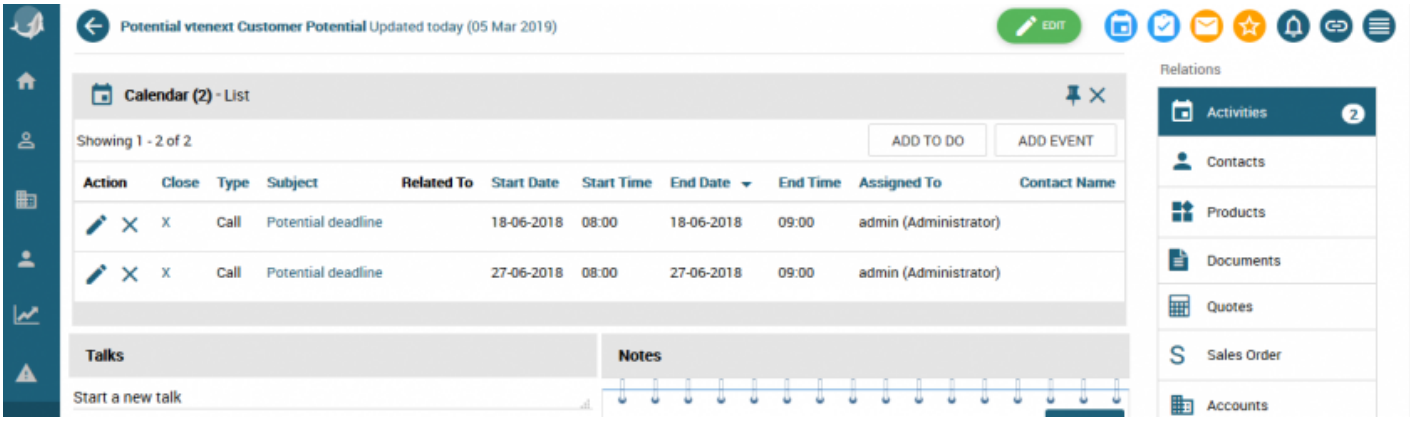
Buongiorno Administrator ,
di seguito riportato il riepilogo dell'Opportunità POT31:

Numero	POT31
Nome	Opportunità Cliente VTENEXT
Ammontare	0.00
Collegato a	vtenext
Data Chiusura Attesa	2018-06-23
Data Chiusura Effettiva	2018-06-30
Tipo	--Nessuno--
Fonte Lead	--Nessuno--
Stadio di Vendita	Aperta
Assegnato a	admin

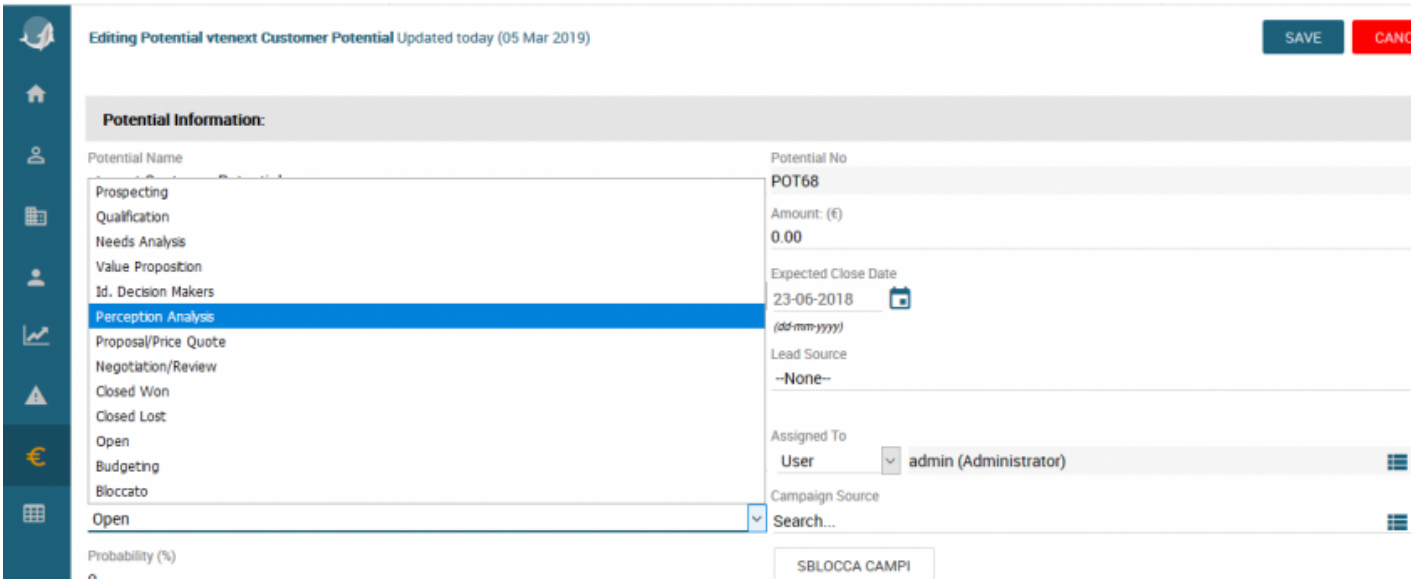
Accedi direttamente all'Opportunità con il seguente link:
http://192.168.1.89/vte1805_1702/index.php?action=DetailView&module=Potentials&record=460

L'Amministrazione VTENEXT ringrazia.
11-06-2018 05:27:32

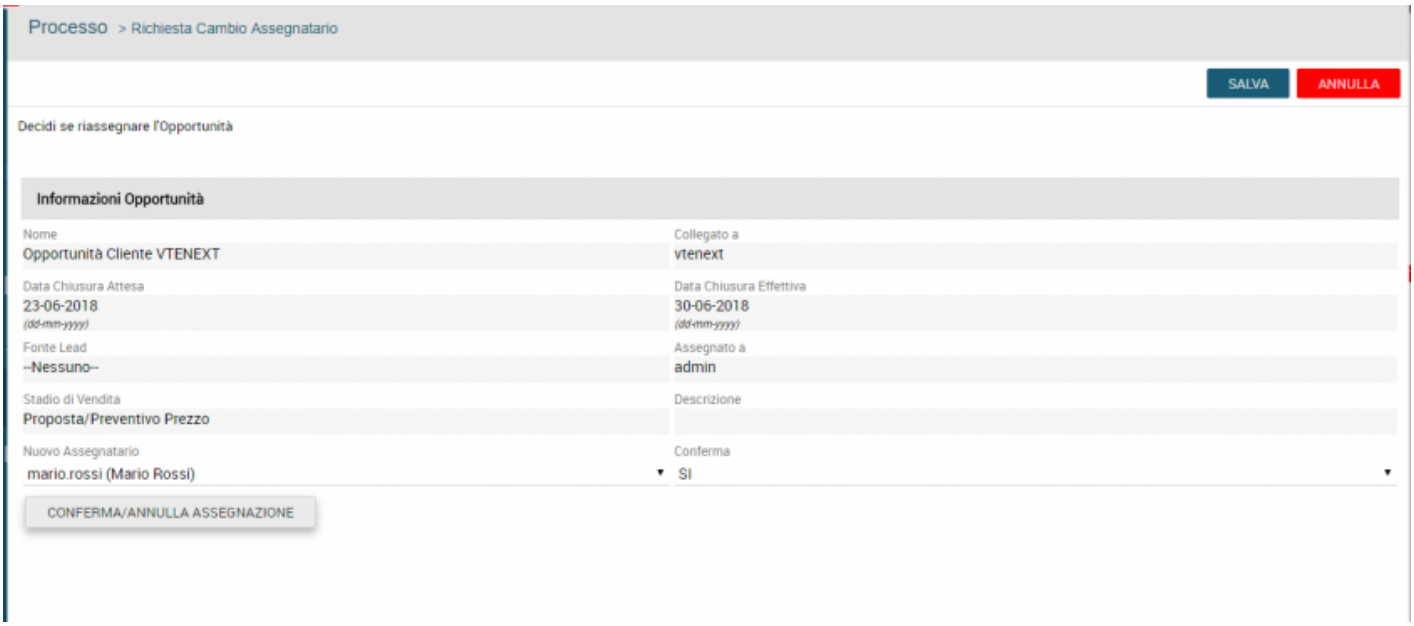




At this point the process is blocked until the Sales status changes in one of the stages previously configured.
Here we chose the status **“Proposal Price/ Quote”**.



Once saved, the assignee of the Potential will display a pop up containing a recap of the data in read only mode, it will also have the chance to re assign it to another user.
Once the desired user is selected we chose the **“Yes”** value in the pick list (it is possible to click on the button **“Confirm/delete”** to change to value of the pick list on Yes/No) and proceed by clicking on **Save**.



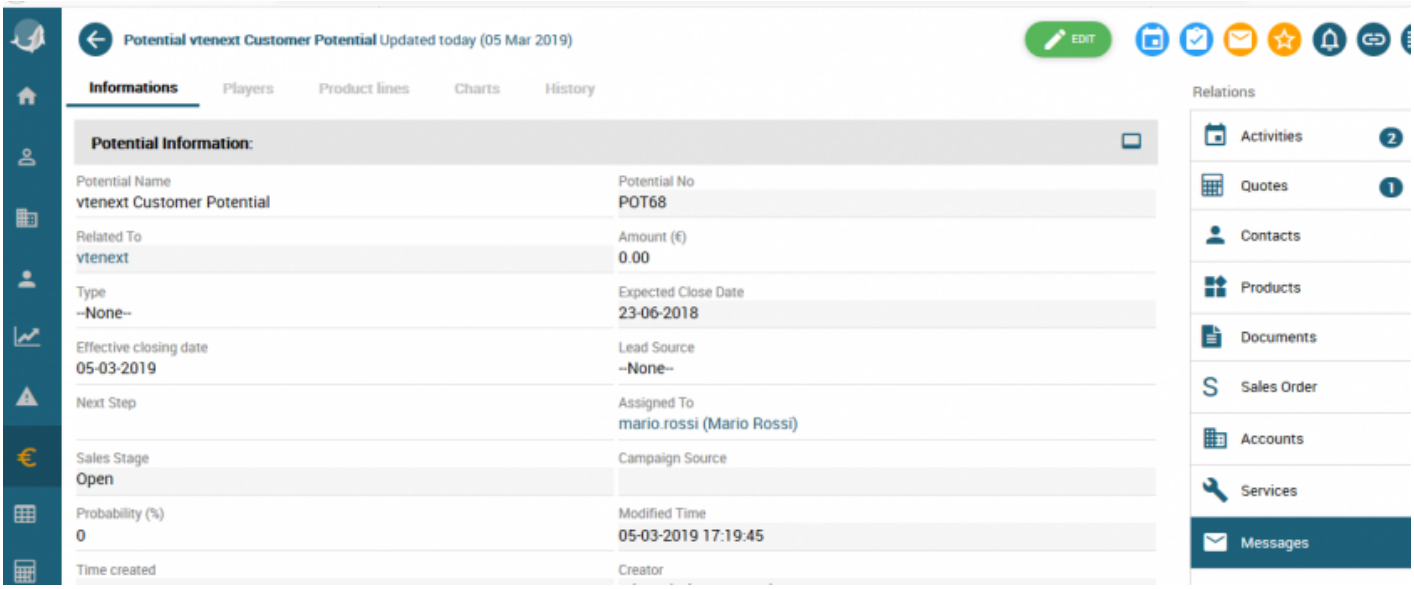
Once confirmed (by selecting the Yes value in the pop up) the assignee of the Opportunity is updated and will
receive an email containing its data. By looking at the relations we can see the email sent and the created Quote, because the status was “Proposal Price/ Quote”.

Buongiorno Rossi Mario,
la presente per informarla di essere il nuovo assegnatario dell'Opportunità POT31.
Di seguito riportate le principali informazioni:

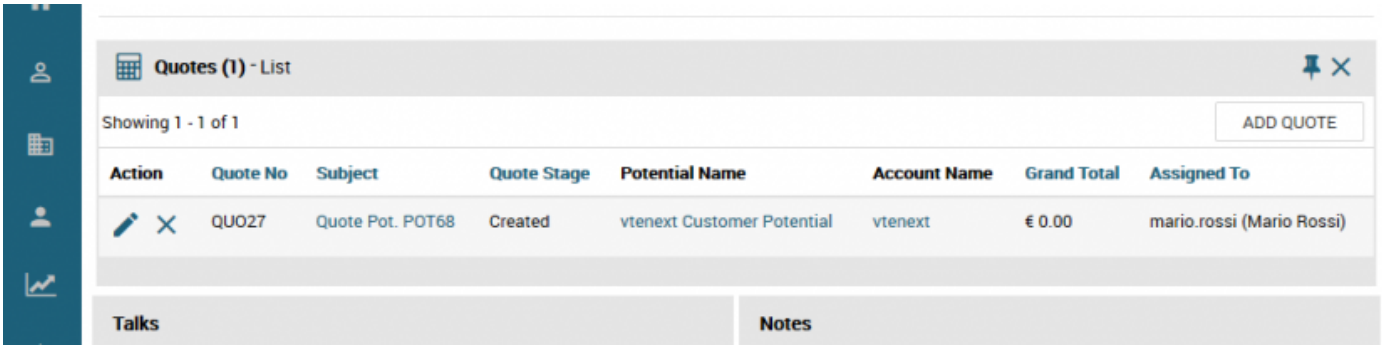
Nome	Opportunità Cliente VTENEXT
Ammontare	0.00
Collegato a	vtenext
Data Chiusura Attesa	2018-06-23
Tipo	--Nessuno--
Stadio di Vendita	Proposta/Preventivo Prezzo
Assegnato a	mario.rossi

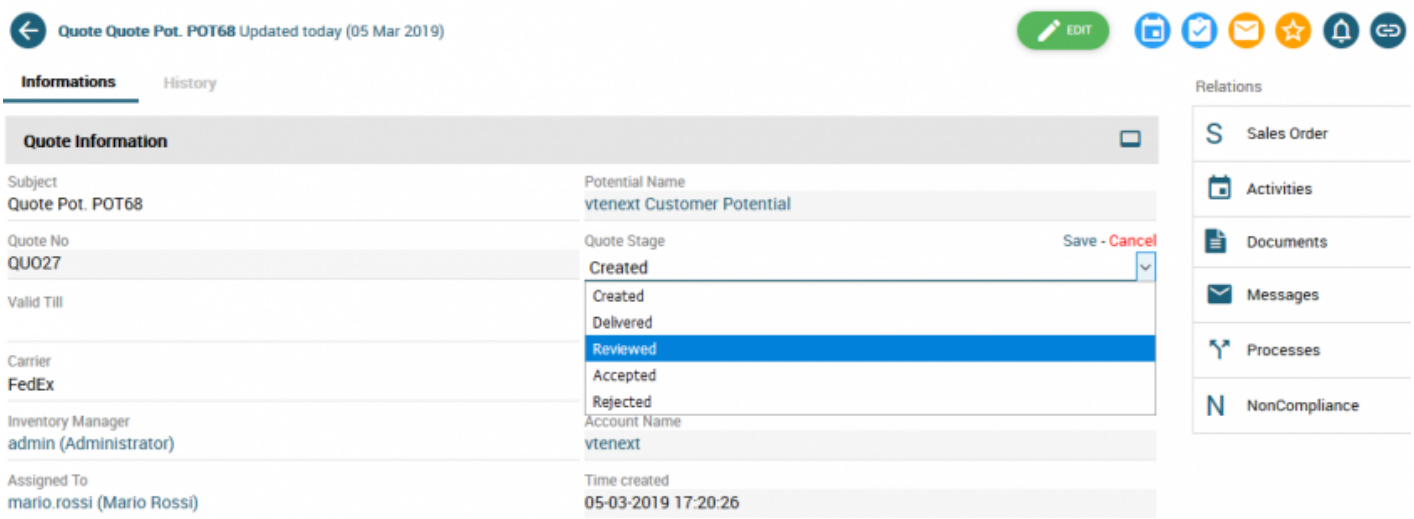
Accedi direttamente all'Opportunità con il seguente link:
http://192.168.1.89/vte1805_1702/index.php?action=DetailView&module=Potentials&record=460

L'Amministrazione VTENEXT ringrazia.
11-06-2018 05:32:51



By looking at the relation with can see the details of the Quote.
At this point, we can open the record of the Quote, change the data, enter new products and change the Status on **"Reviewed"**.



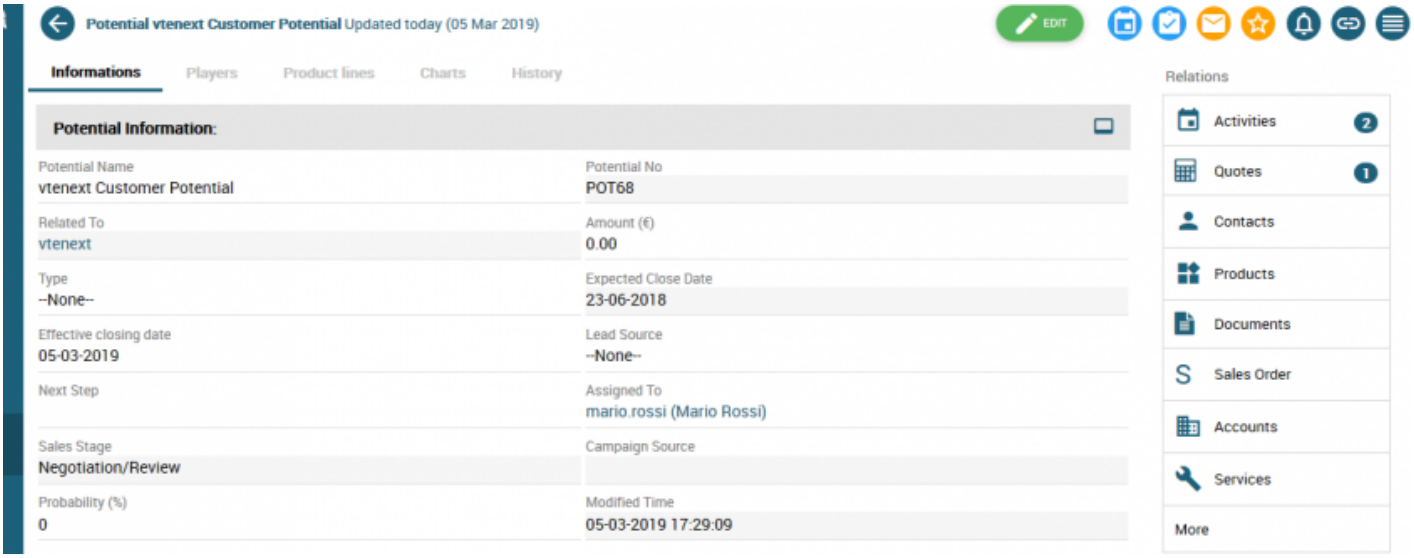


The process goes on by sending an email to the assignee containing the data of the Quote. Furthermore, the Sale Status of the Potential is set in **“Negotiation/ Review”**.

Buongiorno,
di seguito riportate le specifiche del preventivo creato ed accettato in base alle richieste effettuate:

Numero	QUO19
Soggetto	Preventivo da Opp. POT31
Nome Opp.	Opportunità Cliente VTENEXT
Stadio Preventivo	Revisionato
Valido fino a	2018-07-11
Totale	129.000
Totale Documento	129.000

L'Amministrazione VTENEXT ringrazia.
11-06-2018 05:40:13



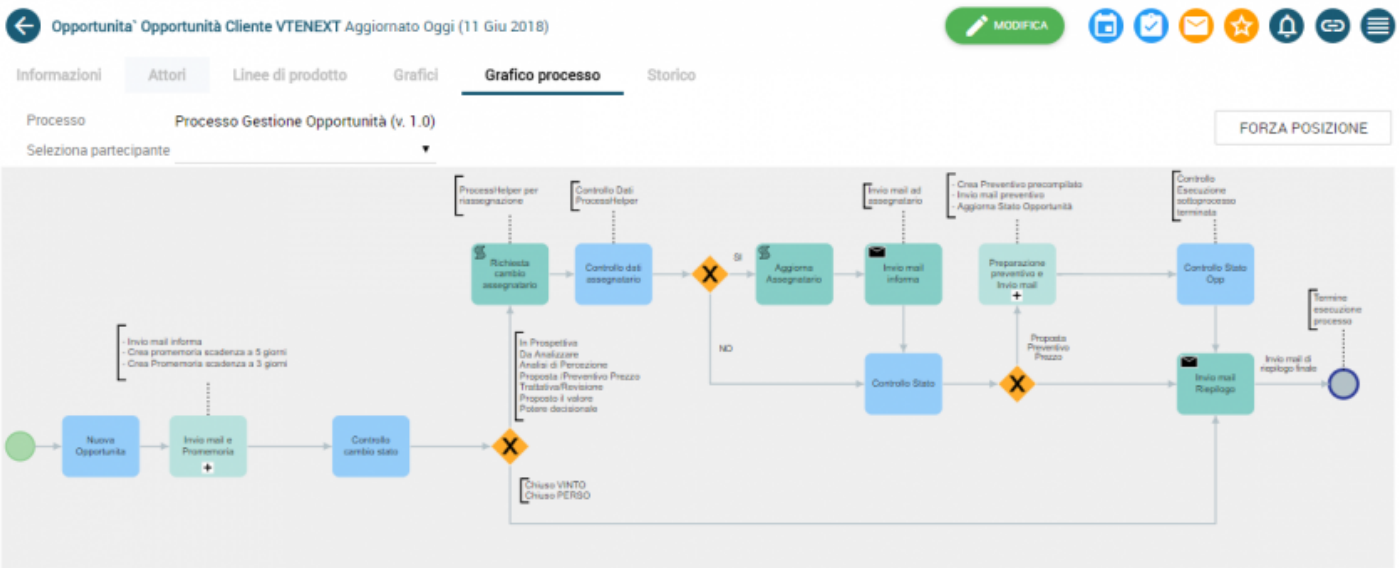
At this point the assignee receives an email containing a final recap of the Potential.
From the **“Process Chart”** tab we can see that the process has finished the execution flow.

Buongiorno Rossi Mario,
di seguito riportato il riepilogo dell'Opportunità POT31:

Numero	POT31
Nome	Opportunità Cliente VTENEXT
Ammontare	129.00
Collegato a	vtenext
Data Chiusura Attesa	2018-06-23
Data Chiusura Effettiva	2018-06-30
Tipo	--Nessuno--
Fonte Lead	--Nessuno--
Stadio di Vendita	Trattativa/Revisione
Assegnato a	mario.rossi

Accedi direttamente all'Opportunità con il seguente link:
http://192.168.1.89/vte1805_1702/index.php?action=DetailView&module=Potentials&record=460

L'Amministrazione VTENEXT ringrazia.
11-06-2018 05:40:15



Revision #4
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Updated 2 November 2019 11:28:55