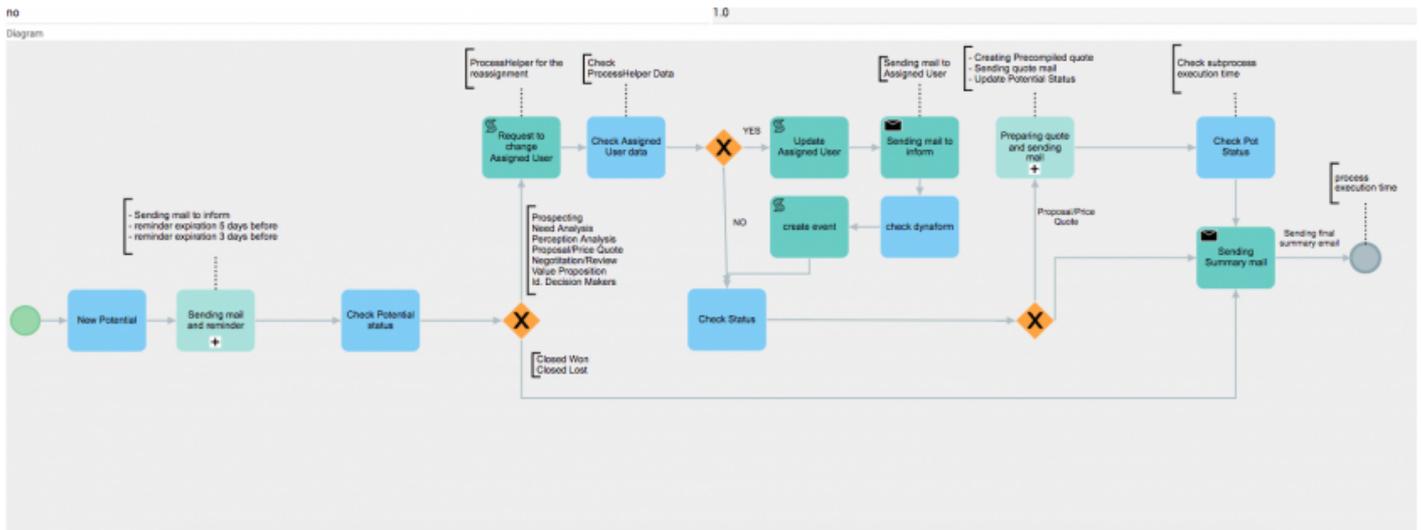


# Process Configuration - POTENTIAL MANAGEMENT

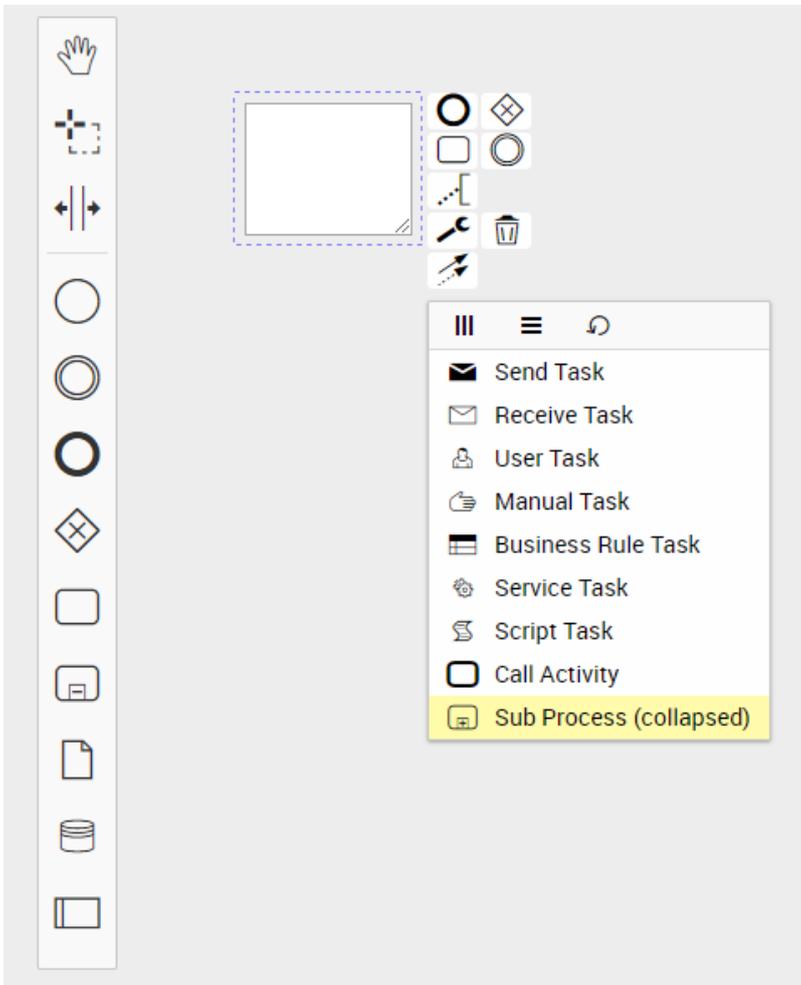
## Main Process: Potential Management



We use the **Task Sub Processes** to create them, doing so we will simplify the logic behind the main process.

In the example below we will draw 2 Sub Processes:

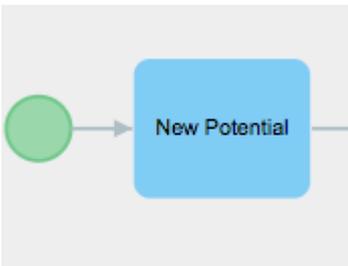
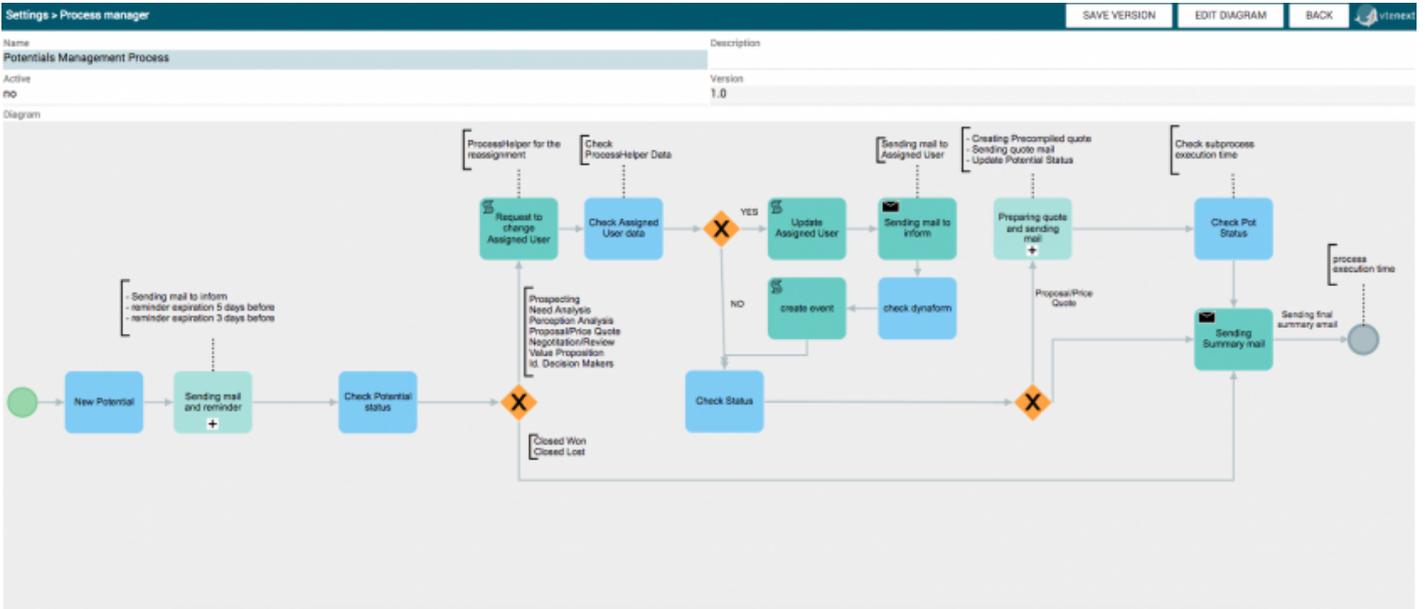
- **1st Send a summary email** to the assignee and creates reminder event.
- **2nd Creates a pre filled Quote** (only if the previous conditions are true) and sends it via email updating the status of the Potential.



**Below you can display the configured process.**

The process is activated once a new Potential is created and follows the flow in order to reassign it or to change its status.

To activate it we tick **“Active”** once the chart and the configuration are ended.



On the left the first task, ore better the initial condition, has been created. Therefore we select the entity, **“Potentials”**, and we choose when to run the check **“on creation”**.

Then we state a Group of condition to start the process, in this case the Sales Stage has to be among the ones reported below (“Prospecting”, “Qualification”, “Budgeting”).

BPMN-Task: New Potential Task\_1br7rtw

SAVE CANCEL

Entity: Potential

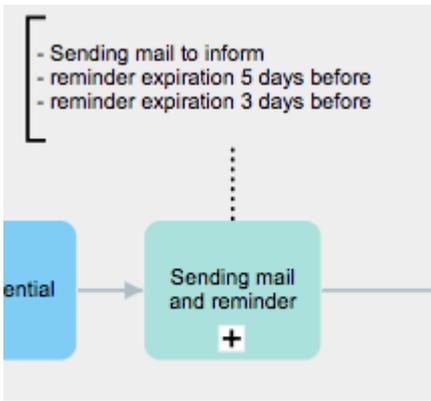
When to run the check

- on create
- on create / change
- on change
- every time the condition is true
- when executed subprocess

Conditions NEW GROUP

Stadio di vendita	not equal to	Qualificazione	And
Stadio di vendita	not equal to	In preventivazione	

NEW CONDITION

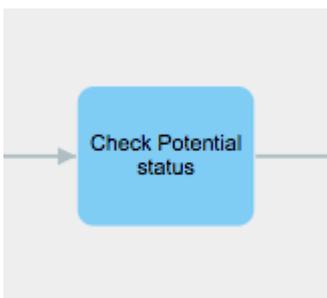


This task represents the link to a sub process, which follows its own flow. For this reason we need to choose the sub process to link. In the process selected there is contained an email sending task to inform about the creation of the potential and the creation of two reminders, one 5 days before the expiry date, and the other 2 days before.

BPMN-SubProcess: Sending mail and reminder SubProcess\_178

Nessun sottoprocesso

Name	Description	Subprocesses	Active
<input type="radio"/> Processo Gestione Opportunità			no
<input checked="" type="radio"/> Scadenza Opportunità	SottoProcesso	Preventivo Precompilato, Scadenza Opportunità	no
<input type="radio"/> Preventivo Precompilato	SottoProcesso		no
<input type="radio"/> test inventory			no
<input type="radio"/> test doc			no
<input type="radio"/> test webform lead			no
<input type="radio"/> Processo Padre - 08-06		Sottoprocesso1, Sottoprocesso2	no
<input type="radio"/> Sottoprocesso1			no
<input type="radio"/> Sottoprocesso2			no
<input type="radio"/> Processo2-08-06			no
<input type="radio"/> Compleanno			no
<input type="radio"/> Processo merceFunction			no



This task represents a check on the potential's status (Sales Stage). Here we define the **statuses that have to be managed**.

They are divided in two blocks:

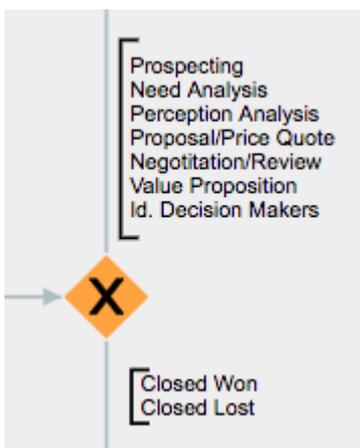
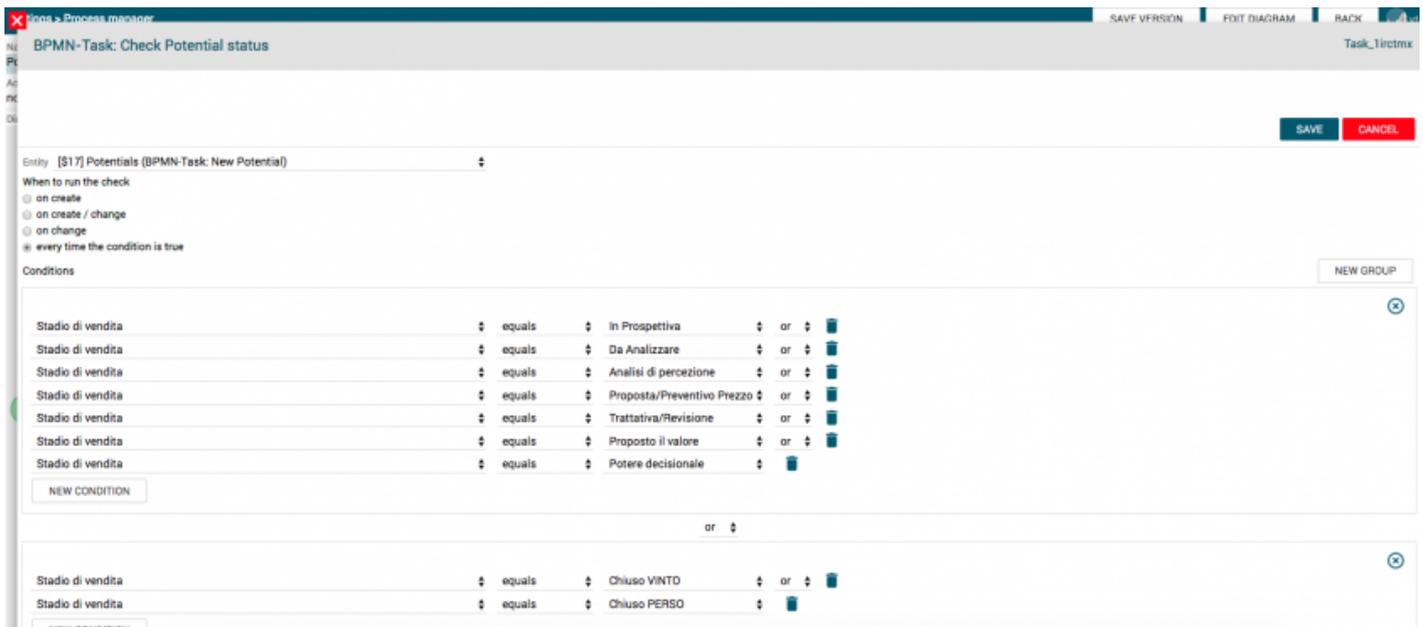
- Prospecting
- Needs Analysis
- Perception Analysis
- Proposal/ Price Quote

- Negotiation/ Review
- Value Proposition
- Decision Makers

OR

- Close WON
- Close LOST

The setting is displayed in the following page.



This task is an Exclusive Gateway, which defines the different flows according to the conditions previously set. In this case, if the Sales Status is among the ones reported earlier in the first block (Prospecting, Decision Makers, Negotiation/ Review etc) the process goes on with the task called "Change assignee request". On the contrary if the status is one of the second block, **Close WON/LOST**, we go on with the Task **"Send Summary Email"**.

BPMN-ExclusiveGateway ExclusiveGateway\_Dtjwaw

[SAVE](#) [CANCEL](#)

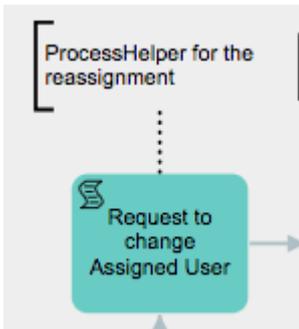
Check Potential status

Sales Stage equals Prospecting or Sales Stage equals Needs Analysis or Sales Stage equals Perception Analysis or Sales Stage equals Proposal/Price Quote or Sales Stage equals Negotiation/Review or Sales Stage equals Value Proposition or Sales Stage equals Id. Decision Makers

ScriptTask: Request to change Assigned User

Sales Stage equals Closed Won or Sales Stage equals Closed Lost

SendTask: Sending Summary mail



This task uses the **“ProcessHelper”** that talks with the user asking a manual intervention. We flag the box **“Show pop up in the linked entity”** to make a window appear (dynamic form) containing a set of data in read only mode as a recap and a user field in which a new assignee can be selected and a Button field in which is possible to change the picklist value **“Confirm”**.

It is necessary to confirm to proceed.

BPMN-ScriptTask: Request to change Assigned User ScriptTask\_08xxx09

[SAVE](#) [CANCEL](#) [ADVANCED...](#)

[NEW ACTION](#)

Actions

*No actions configured*

Process Helper

Assigned To: Other | Assignato a

Status: Running

Instructions: Do you want to reassign the Potential? | Select Option...

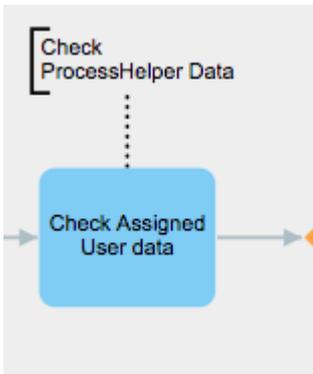
Related to: ID | Request to change User

Show popup in the related entity

Manage dynamic form

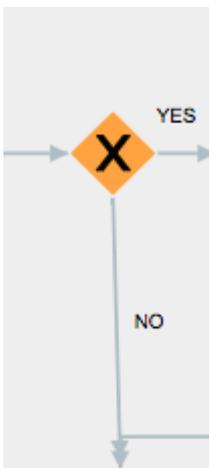
[ADD BLOCK](#) [IMPORT BLOCK...](#)

Potential Information		Related To	
Name	✍️ ⏪ ⏩	Related To	✍️ ⏪ ⏩
Expected Close Date	✍️ ⏪ ⏩	Effective closing date	✍️ ⏪ ⏩
Lead Source	✍️ ⏪ ⏩	Assigned To	✍️ ⏪ ⏩
Sales Stage	✍️ ⏪ ⏩	Description	✍️ ⏪ ⏩
New Assigned User	✍️ ⏪ ⏩	Confirm *	✍️ ⏪ ⏩



This Task checks the data of the Process Helper. As said, though a dynamic form some recap fields and a confirmation pick list are shown (**YES/NO**), this defines the new reassignment.

A screenshot of the configuration interface for a BPMN task named 'BPMN-Task: Check Assigned User data'. The interface includes a header with the task name and a 'Task\_08pgqs' identifier. Below the header are 'SAVE' and 'CANCEL' buttons. The main configuration area shows the entity '[SDF1] Form dinamica (BPMN-ScriptTask: Request to change Assigned User)' and options for when to run the check: 'on change' (selected) and 'every time the condition is true'. Under the 'Conditions' section, there are two conditions defined: 'Confirm equals YES' and 'Confirm equals NO', each with a 'NEW CONDITION' button and a trash icon. The conditions are separated by an 'or' connector.



In this point we use the Exclusive Gateway to decide which way the process has to take according to the answer given in the Dynamic Form. If the user confirmed (**YES**) the process goes on by reassigning the Potential, if not (**NO**) the process checks its sales status (**Sales Stage**).

SAVE CANCEL

## Check Assigned User data

Confirm equals YES

ScriptTask: Update Assigned User (YES)

Confirm equals NO

Task: Check Status (NO)



The Task on the left performs an update action. The user previously chosen in the Dynamic Form will be reported in the Potential. Therefore we add a new action – **update entity**.

We select the Potential and we change the field Assigned to taking as reference the field contained in the Dynamic Form, that is to say **“New Assignee”**.

## Action: Update entity

SAVE CANCEL

Action title Update Assigned User

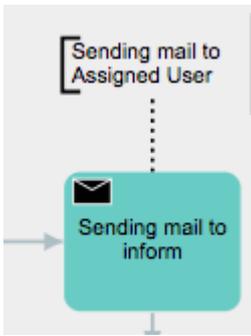
Entity ID

## Potential Information:

<input type="checkbox"/> Potential Name	Select Option...	<input type="checkbox"/> Potential No	AUTO GEN ON SAVE
<input type="checkbox"/> Related To	Accounts Search...	<input type="checkbox"/> Amount	Select Option...
<input type="checkbox"/> Type	-None-	<input type="checkbox"/> Expected Close Date	Select Option...
<input type="checkbox"/> Effective closing date	Select Option...	<input type="checkbox"/> Lead Source	-None-
<input type="checkbox"/> Next Step	Select Option...	<input checked="" type="checkbox"/> Assigned To	Other New Assigned User
<input type="checkbox"/> Sales Stages	-Please select-	<input type="checkbox"/> Campaign Source	Campaigns Search...
<input type="checkbox"/> Probability (%)	Select Option...	<input type="checkbox"/> Creator	admin (Administrator)

SBLOCCA CAMPI

## Description Information:



This task is the email sending that informs the new Assignee of the Potential. The user will receive an email containing a summary of the Opportunity.

In the email the process fills the mandatory field, that is to say: Sender, Receiver, Subject and Body.

Action: Send email

SAVE CANCEL

Action title Sending mail to inform

From jeremy.smithabc123@gmail.com Select Option...

To \$17-(assigned\_user\_id : (Users) email1) Select Option...

Cc Select Option...

Bcc Select Option...

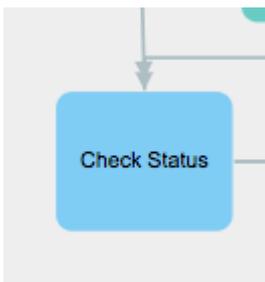
Subject New Potential - \$17-potential\_no Select Option...

Message Select Option... Select Option...

Source Styles Format Font Size

Good Morning \$17-(assigned\_user\_id : (Users) last\_name) \$17-(assigned\_user\_id : (Users) first\_name), this email to inform you who are the new assigned user of the Potential \$17-potential\_no. Below the main information:

Name	\$17-potentialname
Amount	\$17-amount
Related To	\$17-(related_to : (Accounts) accountname) \$17-(related_to : (Contacts) lastname) \$17-(related_to : (Contacts) firstname)
Expected Close Date	\$17-closingdate
Type	\$17-opportunity_type
Sales stage	\$17-sales_stage
Assigned To	\$17-(assigned_user_id : (Users) user_name)



The task here pictured represents a second check on the Potential status (Sales Stage).

We define the possible status that have to be managed. In this case we check if the sales stage is equal to “Proposal Price/Quote” or not.

If the result is a match we go on by recalling the subprocess “Pre filled Quote”, otherwise we go directly to the task “Send summary Email”.

BPMN-Task: Check Status Task\_Drv

**SAVE** **CANCEL**

Entity [17] Potentials (BPMN-Task: New Potential)

When to run the check

- on create
- on create / change
- on change
- every time the condition is true

Conditions NEW GROUP

Stadio di vendita	↕	equals	↕	Proposta/Preventivo Prezzo	↕	🗑️
NEW CONDITION						
or						
Stadio di vendita	↕	equals	↕	Chiuso VINTO	↕	or
Stadio di vendita	↕	equals	↕	Chiuso PERSO	↕	🗑️
NEW CONDITION						



This task is another Exclusive Gateway, which defines the following steps according to the conditions previously set. So if the sales stage is Proposal Price/Quote to process goes on with the following task as previously said, that is by recalling the sub process "Pre filled Quote". Otherwise it goes on with the email sending.

BPMN-ExclusiveGateway ExclusiveGateway

**SAVE**

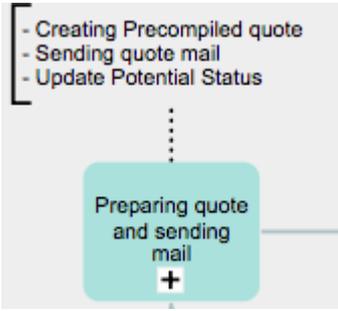
Check Status

Sales Stage equals Proposal/Price Quote

SubProcess: Preparing quote and sending mail (Proposal/Price Quote)

Sales Stage equals Closed Won or Sales Stage equals Closed Lost

SendTask: Sending Summary mail



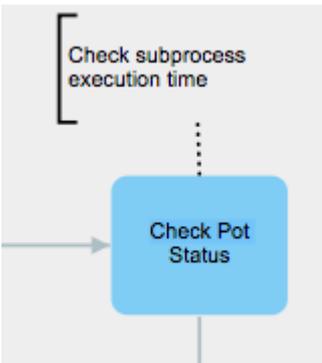
The task on the left represents a link to a sub process, which will create a quote and when its stage is changed in “Negotiation/Review”, will send an email and update the sales stage of the Potential.

BPMN-SubProcess: Preparing quote and sending mail SubProcess\_Dm23vj

[SAVE](#) [CANCEL](#)

» Nessun sottoprocesso

Name	Description	Subprocesses	Active
» Processo Gestione Opportunità		Preventivo Precompilato, Scadenza Opportunità	no
» Scadenza Opportunità	SottoProcesso		no
» Preventivo Precompilato	SottoProcesso		no
» test inventori			no



We go in with a task that runs a check and the sales stage of the opportunity, to verify the complete execution of the Sub Process. If it is equal to **“Negotiation/Review”**, the flow goes on with the next Task, the sending of an email containing the final recap.

BPMN-Task: Check Pot Status [SAVE](#)

Entity [S17] Potentials (BPMN-Task: New Potential) ⌵

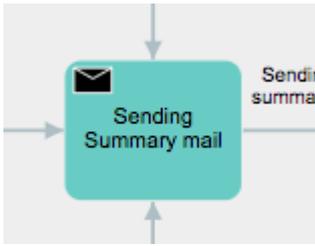
When to run the check

on create  
 on create / change  
 on change  
 every time the condition is true

Conditions

Stadio di vendita ⌵ equals ⌵ Trattativa/Revisione ⌵

[NEW CONDITION](#)



This task represents the last action, a summary email to inform the assigned user about Potential data.

Click on "New action" - Send email and then insert all needed fields.

After that, the process will be ended (End event).

**Action: Send email**

SAVE CAN

Action title: **Sending Summary mail**

From:  Select Option...

To:  Select Option...

Cc:  Select Option...

Bcc:  Select Option...

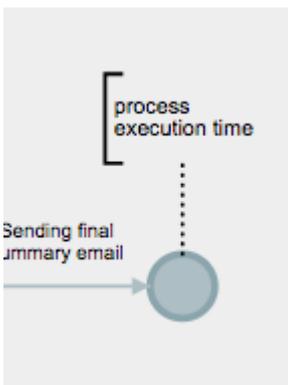
Subject:  Select Option...

Message:  Select Option...

Source Styles Format Font Size [Rich Text Editor Icons]

Good Morning \$17-(assigned\_user\_id : (Users) last\_name) \$17-(assigned\_user\_id : (Users) first\_name), below there's the Summary of the Potential \$17-potential\_no:

Number	\$17-potential_no
Name	\$17-potentialname
Amount	\$17-amount
Related To	\$17-(related_to : (Accounts) accountname) \$17-(related_to : (Contacts) lastname) \$17-(related_to : (Contacts) firstname)
Expected Close Date	\$17-closingdate
Effective closing date	\$17-efl_closingdate



As said, the process ends with an End Event, to which is linked the **"Potential"** and the status is set on **"Ended"**.

BPMN-EndEvent EndEvent\_Dwrxhj

Actions

No actions configured

Process Helper

Assigned To: Other | Assegnato a: [dropdown]

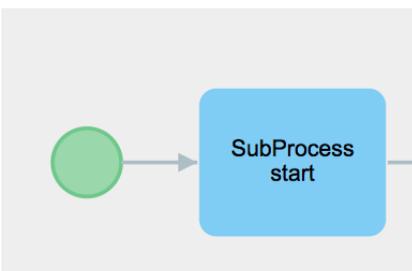
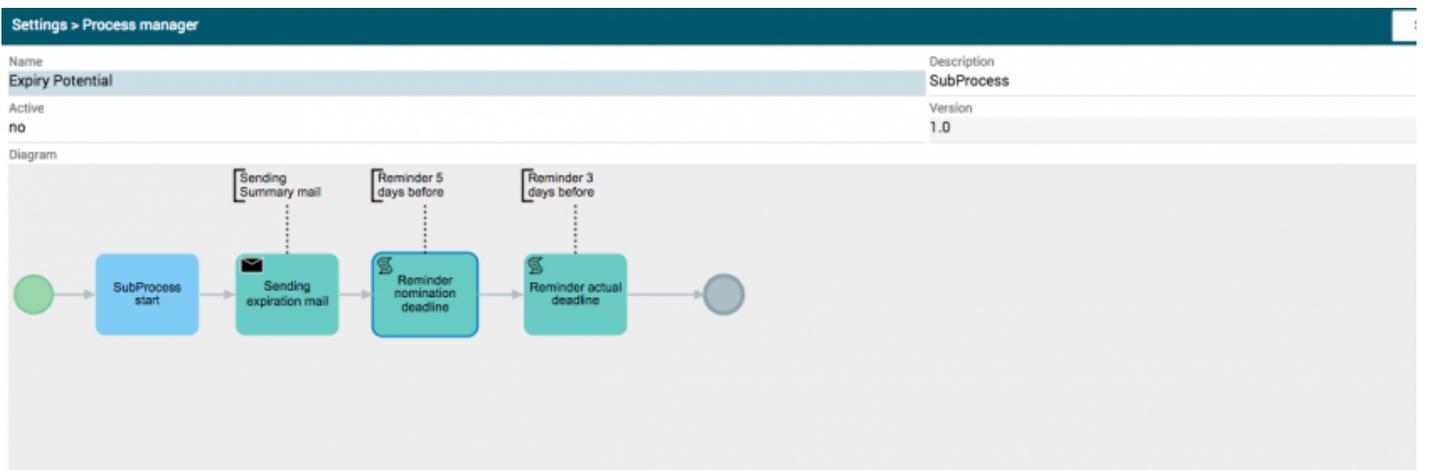
Status: Ended | Related to: ID [dropdown]

Instructions: [Select Option...]

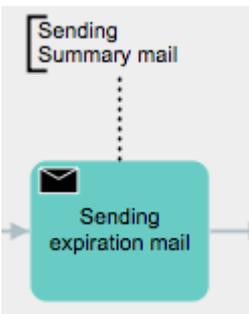
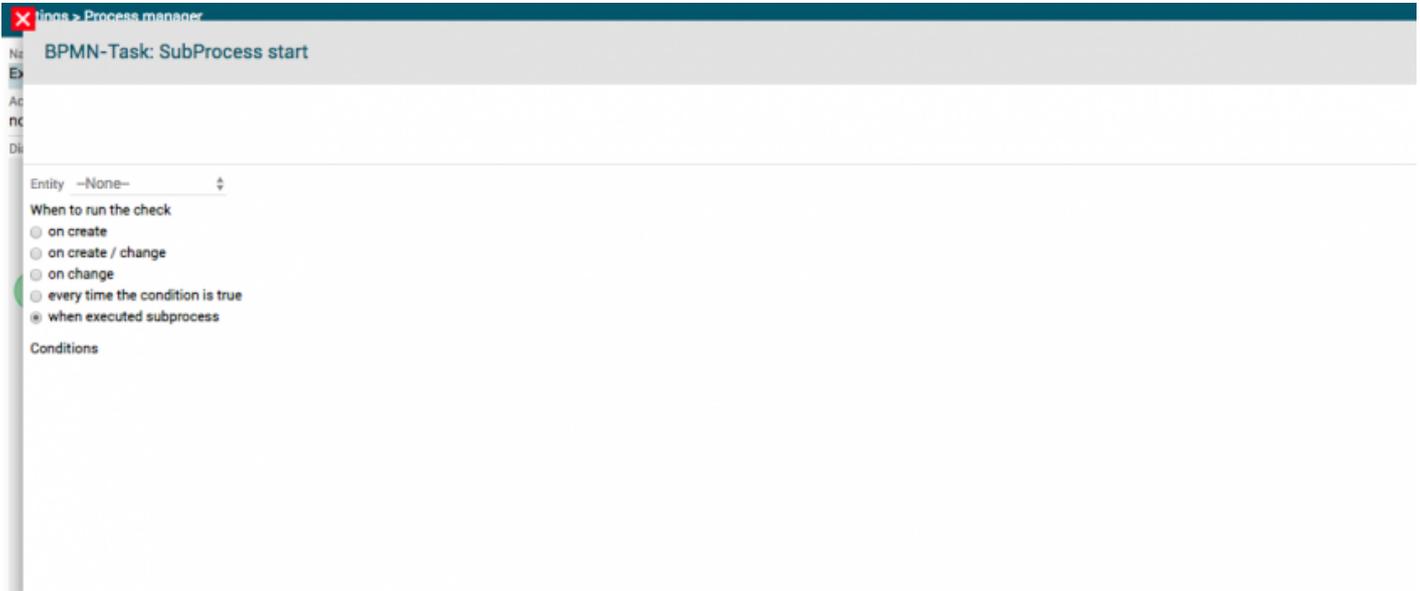
Show popup in the related entity

Manage dynamic form

## Subprocess: "Potential Expiry"



The Task represented is the initial one to launch the Sub Process. No entity is selected and on **“When to run the check”** we select **“When executed subprocess”**.



In this Task the email sending to the assignee of the Potential is configured. We chose **New Action - Send Email**.

We enter the main information (sender, receiver, subject, body..)

Action: Send email

SAVE CANCEL

Action title: Sending expiration mail

From: jeremy.smithabc123@gmail.com Select Option...

To: \$18:17-(assigned\_user\_id : (Users) email1) Select Option...

Cc: Select Option...

Bcc: Select Option...

Subject: Potential \$18:17-potential\_no Select Option...

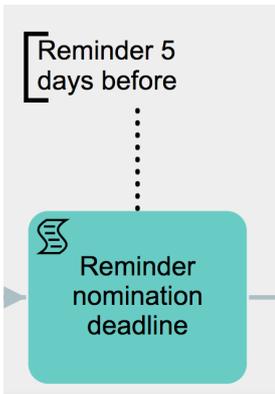
Message

Select Option... Select Option...

Source Styles Format Font Size

Good Morning \$18:17-(assigned\_user\_id : (Users) last\_name) \$18:17-(assigned\_user\_id : (Users) first\_name), below there's the Summary of the Potential \$18:17-potential\_no:

Number	\$18:17-potential_no
Name	\$18:17-potentialname
Amount	\$18:17-amount
Related To	\$18:17-(related_to : (Accounts) accountname) \$18:17-(related_to : (Contacts) lastname) \$18:17-(related_to : (Contacts) firstname)
Expected Close Date	\$18:17-closingdate
Effective closing date	\$18:17-efl_closingdate
Type	\$18:17-opportunity_type
Lead Source	\$18:17-leadsource



On the left we can see a task used to create a reminder, that is a calendar event close to the expected expiry date.

The event is planned 5 days before the **“Expred Close Date”** reported in the Potential.

Action: Create entity

SAVE CANCEL

Action title: Reminder nomination deadline  
Module: Event

**Event Information**

Event Type: Call | Visibility: Standard

Event Name: Reminder nomination deadline Potential \$18:17-potential\_no [Select Option...]

Description: The Potential \$18:17-potentialNo - \$18:17-potentialname - \$18:17-sales\_stage - has the nomination deadline on \$18:17-closingdate. Please Check data. [Select Option...]

Location: [Select Option...] | Status: Planned

Assigned To: Other | Assegnato a | Priority: High

**Event starts at**

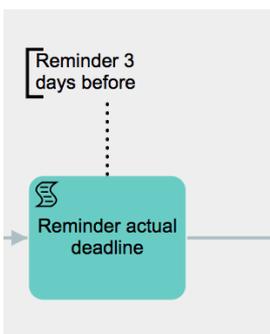
Date: Data di chiusura attesa | - 5 days

Time: Custom | Hr: 08 | min: 00

**Event ends on**

Date: Data di chiusura attesa | - 5 days

Time: Custom | Hr: 09 | min: 00



In this Task we see the creation of a second reminder event. This, unlike the first one, is planned tree days before the expected close date reported in the Potential.

Therefore we fill the various fields as indicated and we subtract 3 days from the indicated date.

Action: Create entity

SAVE CANCEL

Action title **Reminder actual deadline**

Module **Event**

---

**Event Information**

Event Type **Call** Visibility **Standard**

Event Name **Reminder actual deadline Potential \$18:17-potential\_no**

Description **The Potential \$18:17-potential\_no - \$18:17-potentialname - \$18:17-sales\_stage - has the actual deadline on \$18:17-closingdate. Please Check data.**

Location **Other** Status **Planned**

Assigned To **Assegnato a** Priority **High**

---

**Event starts at**

Date **Data chiusura effettiva**

- 3 days

Time **Custom** Hr. 08 min 00

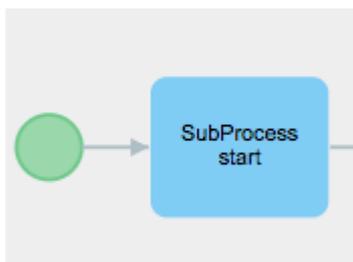
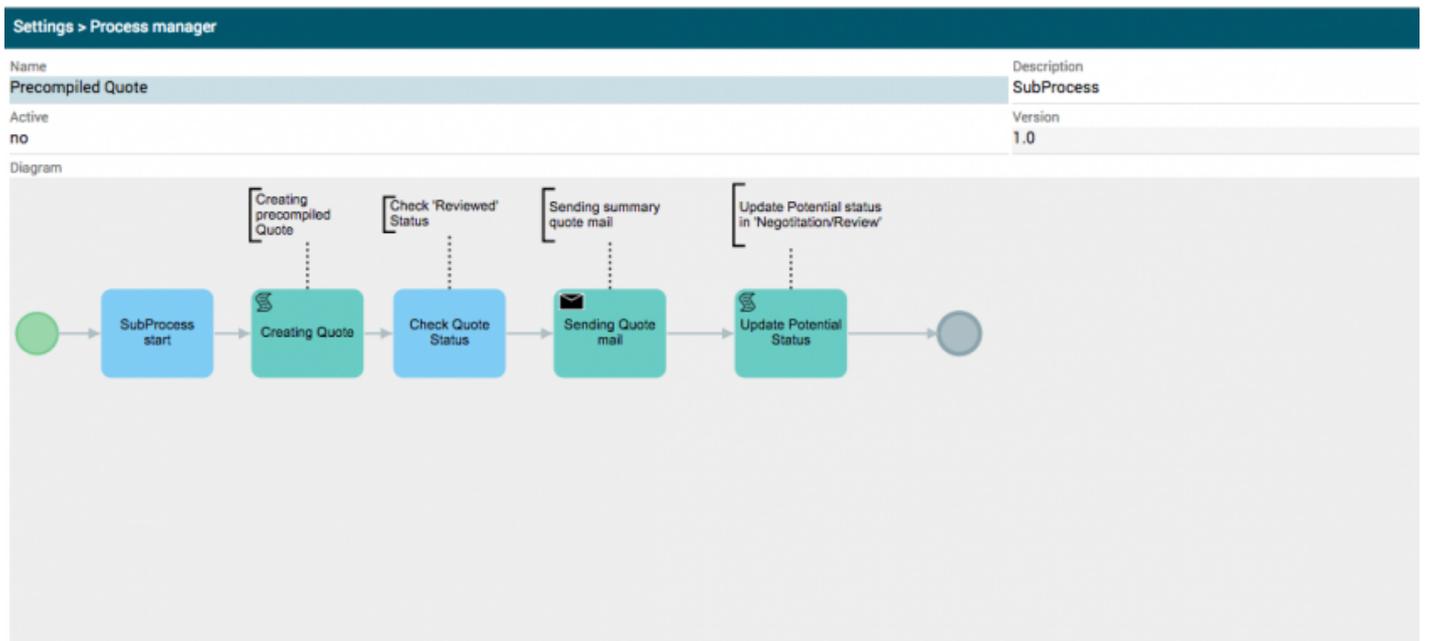
**Event ends on**

Date **Data chiusura effettiva**

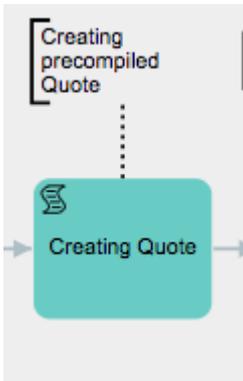
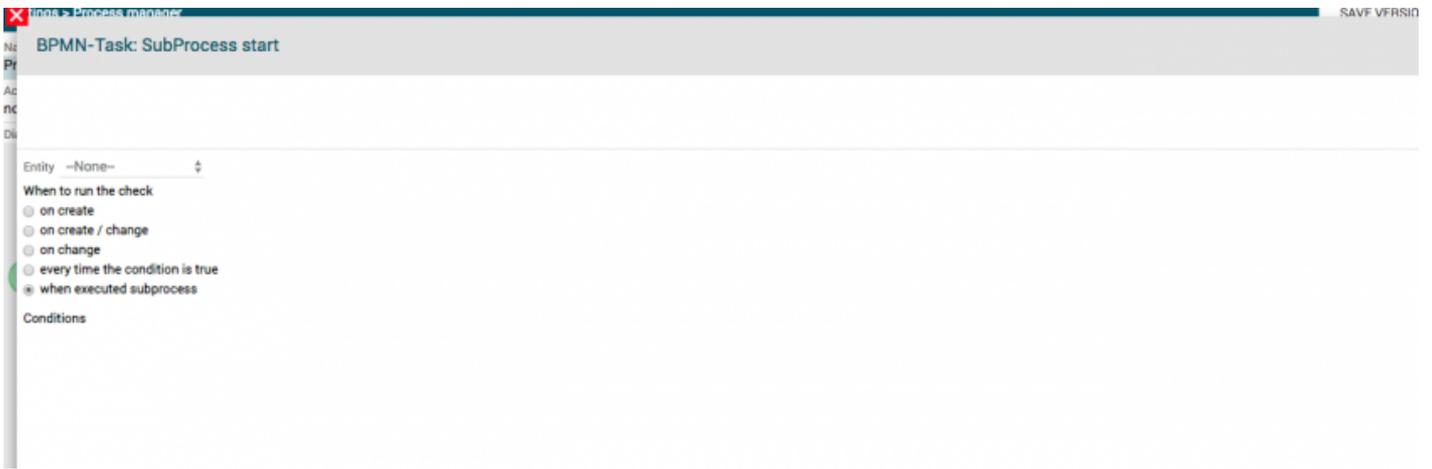
- 3 days

Time **Custom** Hr. 09 min 00

## Subprocess: Pre Filled Quote



As seen in the previous Sub Process, we find the start Task to begin the process. In fact we don't select an entity and on **"When to run the check"** we select **"When executed subprocess"**.



In this Task we configure a New Action - Create Entity, then we select the **“Quote”** module to create a pre filled one.

We place the title of the action and the various fields, we also link the Potential and we set the expiry date in 30 days.

Action: Create entity

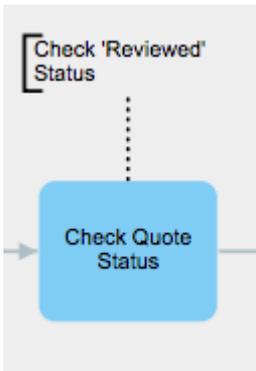
SAVE CANCEL

Action title: Creatin precompiled Quoted

Module: Quote

Quote Information

Subject	Select Option...	Potential Name	Other	ID
Quote No	AUTO GEN ON SAVE	Quote Stage	Created	
Valid Till	Now	Contact Name	Contacts	Search...
Carrier	FedEx	Total	0	Select Option...
Shipping	Select Option...	Inventory Manager	Assegnato a	Select Option...
Grand Total	0	Tax Type	Select Option...	
Discount Percentage	Select Option...	Discount Amount	Select Option...	
SKH Amount	0	Account Name	Other	Collegato a
Assigned To	Other	Assegnato a		



At this point the Sub Process blocks the execution flow on the Task described below. We wait until the Sales Status of the Quote related to the entity previously created is changed in **“Negotiation/Review”**. Only when this condition is true the process will proceed.

A screenshot of a BPMN task configuration interface. The title is "BPMN-Task: Check Quote Status". The entity is set to "[S24] Quotes (BPMN-ScriptTask: Creating Quote)". Under "When to run the check", the option "every time the condition is true" is selected. The "Conditions" section shows a condition: "Stadio Preventivo" equals "Revisionato". There are "SAVE" and "CANCEL" buttons at the top right, and a "NEW GRID" button at the bottom right.



Once the quote’s status is changed in **“Negotiation/Review”** the process goes on and sends the details to the related entity (Account or Contact) with the assignee in copy.



