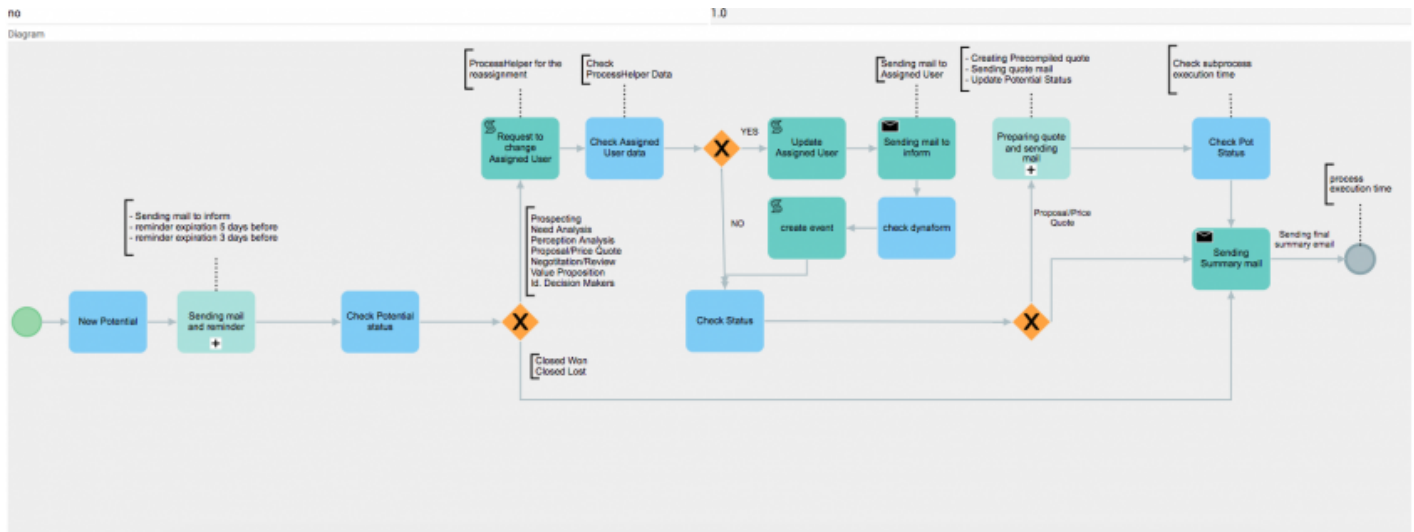


Process Configuration - POTENTIAL MANAGEMENT

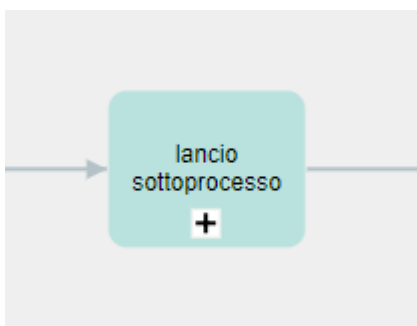
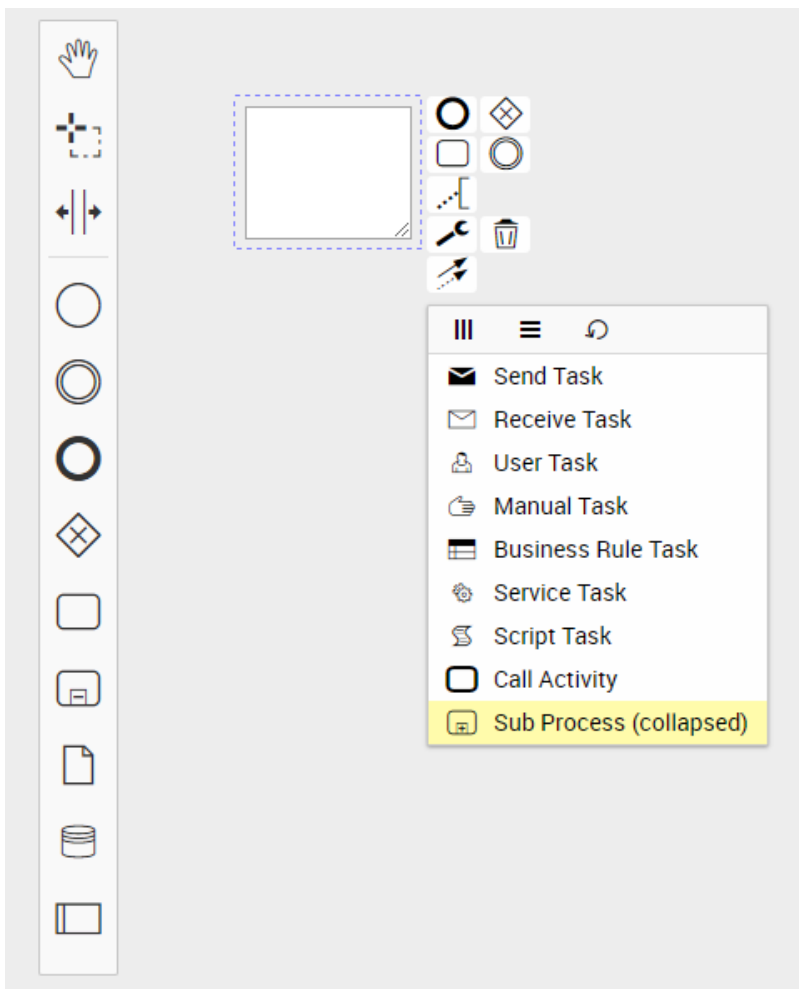
Main Process: Potential Management



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:

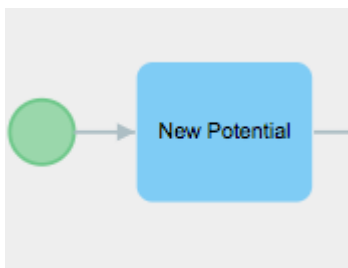
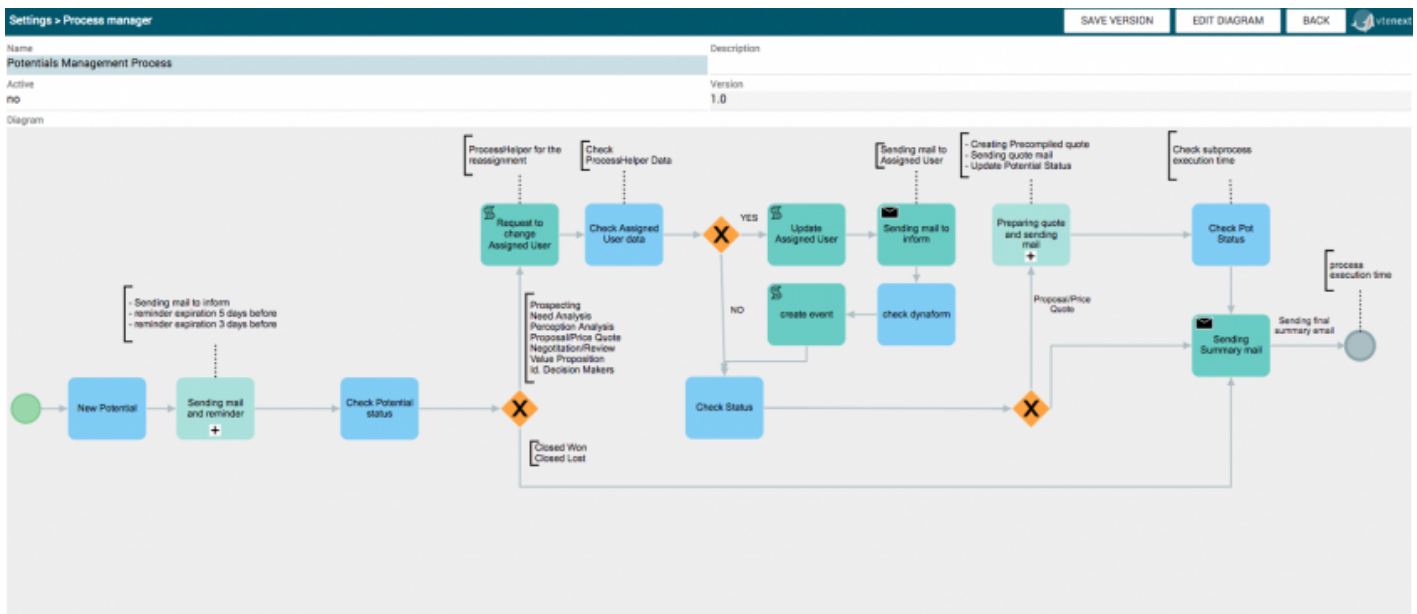
- **1st Send a summary email** to the assignee and creates reminder event.
- **2nd Creates a pre filled Quote** (only if the previous conditions are true) and sends it via email updating the status of the Potential.



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

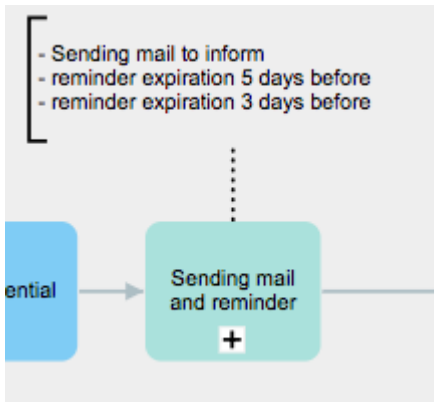
- ☒ on create
- ☐ on create / change
- ☐ on change
- ☐ every time the condition is true
- ☐ when executed subprocess

Conditions

NEW GROUP

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

NEW CONDITION



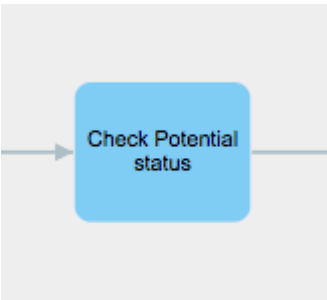
This task represents the link to a sub process, which follows its own flow. For this reason we need to chose the sub process to link. In the process selected there is contained an email sending task to inform about the creation of the potential and the creation of two reminders, one 5 days before the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

BPMN-SubProcess: Sending mail and reminder SubProcess_178k

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

Nessun sottoprocesso

Name	Description	Subprocesses	Active
Processo Gestione Opportunità			no
Scadenza Opportunità	SottoProcesso	Preventivo Precompilato, Scadenza Opportunità	no
Preventivo Precompilato	SottoProcesso		no
test inventory			no
test doc			no
test webform lead			no
Processo Padre - 08-06		Sottoprocesso1, Sottoprocesso2	no
Sottoprocesso1			no
Sottoprocesso2			no
Processo2-08-06			no
Completamento			no
Processo nuovaFunction			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.

BPMN-Task: Check Potential status

Entry: [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

Stadio di vendita	equals	In Prospettiva	or	
Stadio di vendita	equals	Da Analizzare	or	
Stadio di vendita	equals	Analisi di percezione	or	
Stadio di vendita	equals	Proposta/Preventivo Prezzo	or	
Stadio di vendita	equals	Trattativa/Revisione	or	
Stadio di vendita	equals	Proposto il valore	or	
Stadio di vendita	equals	Potere decisionale	or	

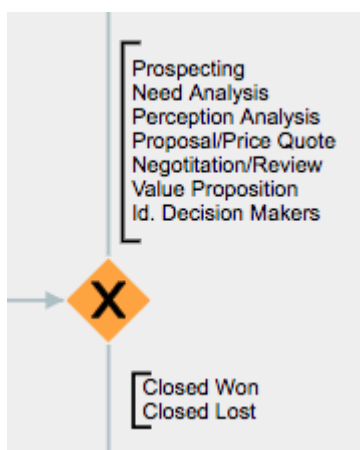
NEW CONDITION

or

Stadio di vendita	equals	Chiuso VINTO	or	
Stadio di vendita	equals	Chiuso PERSO	or	

NEW CONDITION

SAVE CANCEL



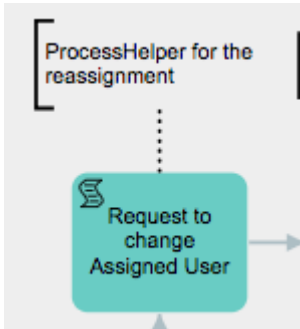
This task is an Exclusive Gateway, which defines the different flows according to the conditions previously set. In this case, if the Sales Status is among the ones reported earlier in the first block (Prospecting, Decision Makers, Negotiation/ Review etc) the process goes on with the task called “Change 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_Dtjbwaw

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 with which is possible to change the picklist value **“Confirm”**.

It is necessary to confirm to proceed.

BPMN-ScriptTask: Request to change Assigned User ScriptTask_08kxzh9

SAVE CANCEL ADVANCED... NEW ACTION

Actions

No actions configured

☒ Process Helper

Assigned To: Other, Assegnato a, ID, Related to, ID, Process Name, Request to change User, Select Option..., Show popup in the related entity

Status: Running

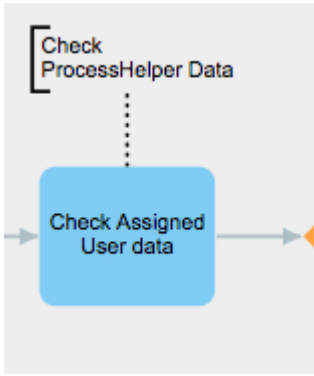
Instructions: Select Option...

Do you want to reassign the Potential?

Manage dynamic form

ADD BLOCK IMPORT BLOCK...

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



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.

BPMN-Task: Check Assigned User data Task_08pgqs

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

Entity: [SDF1] Form dinamica (BPMN-ScriptTask: Request to change Assigned User) ⌵

When to run the check

☐ on change

☒ every time the condition is true

Conditions [NEW GROUP](#)

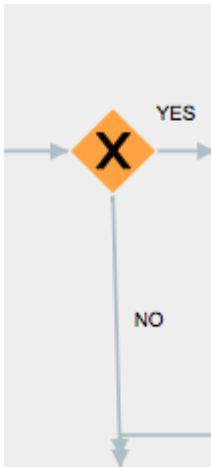
Confirm ⌵ equals ⌵ YES ⌵ ✕

[NEW CONDITION](#)

or ⌵

Confirm ⌵ equals ⌵ NO ⌵ ✕

[NEW CONDITION](#)



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

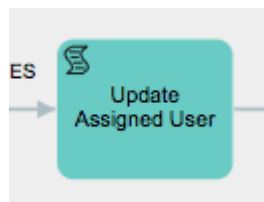
Check Assigned User data

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:

Potential Name

Select Option...

Related To

Accounts

Search...

Type

-None-

Effective closing date

Select Option...

Next Step

Select Option...

Sales Stage

-Please select-

Probability (%)

Select Option...

Potential No

AUTO GEN ON SAVE

Amount

Select Option...

Expected Close Date

Select Option...

Lead Source

-None-

Assigned To

Other

New Assigned User

Campaign Source

Campaigns

Search...

Creator

admin (Administrator)

SBLOCCA CAMPI

Description Information:

BPMN-Task: Check Status

Task_Dmn

SAVE

CANCEL

Entity [517] 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

NEW CONDITION

Stadio di vendita

Stadio di vendita

NEW CONDITION

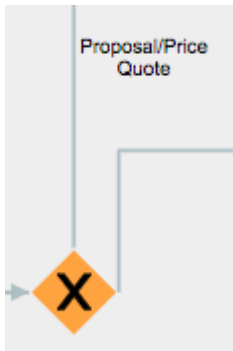
Proposta/Preventivo Prezzo

Chiuso VINTO

Chiuso PERSO

equals

or



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

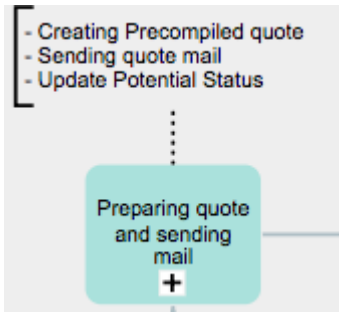
Check Status

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



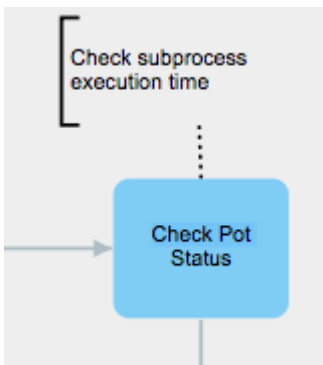
The task on the left represents a link to a sub process, which will create a quote and when its stage is changed in “Negotiation/Review”, will send an email and update the sales stage of the Potential.

BPMN-SubProcess: Preparing quote and sending mail SubProcess_0m23vj

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 inventore			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: [517] 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

BPMN-EndEvent EndEvent_0wvohy

SAVE CANCEL ADVANCED...

NEW ACTION

Actions

No actions configured

☒ Process Helper

Assigned To: Other Assegnato a
 Related to: ID

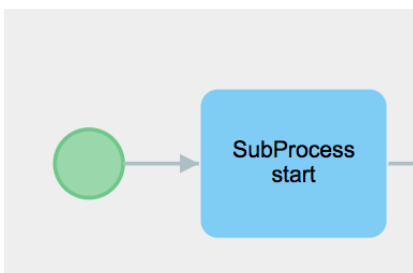
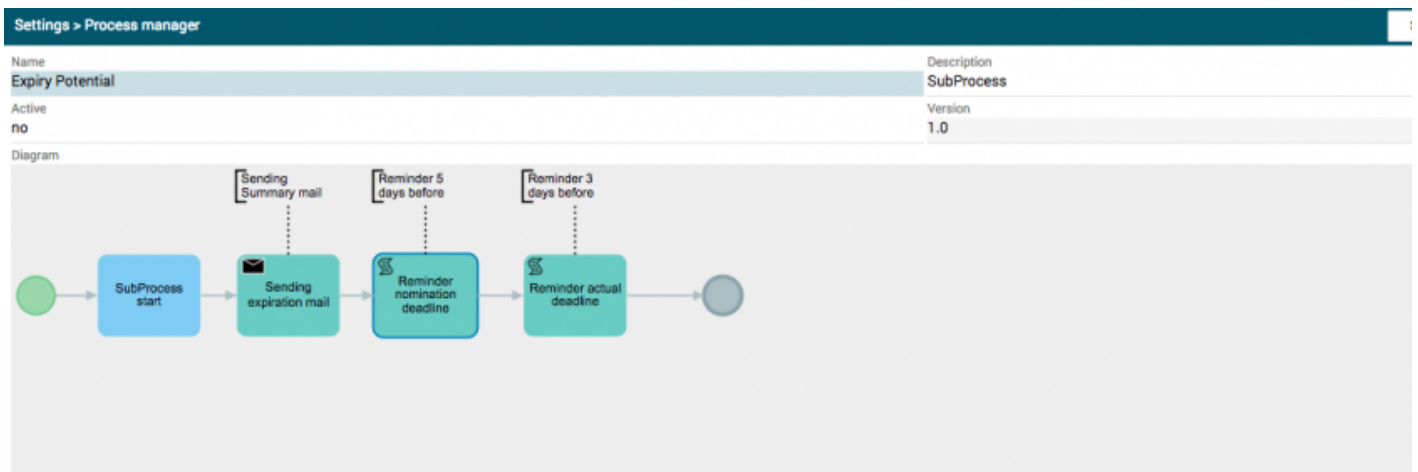
Status: Ended
 ☐ Process Name: Select Option...

Instructions: Select Option...
 ☐ Show popup in the related entity

Manage dynamic form

ADD BLOCK IMPORT BLOCK...

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”**.

Process manager

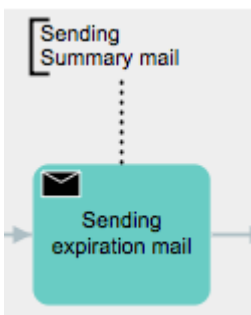
BPMN-Task: SubProcess start

Entity **None**

When to run the check

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

Conditions



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...

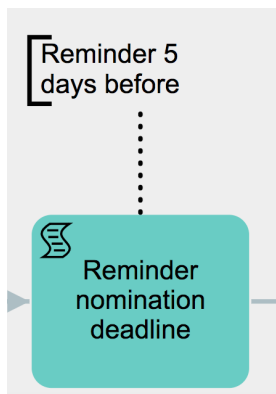
Message

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-eff_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

Description The Potential \$18:17-potential_no - \$18:17-potentialname - \$18:17-sales_stage - has the nomination deadline on \$18:17-closingdate. Please Check data.

Location Status Planned

Assigned To Other Assegnato a Priority High

Event starts at

Date Date di chiusura attesa

- 5 days

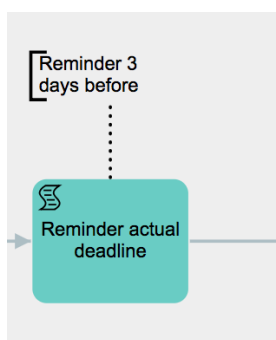
Time Custom Hr. 08 min 00

Event ends on

Date Date 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.

956

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 Status Planned

Assigned To Other Priority High

Event starts at Event ends on

Date Data chiusura effettiva

- 3 days

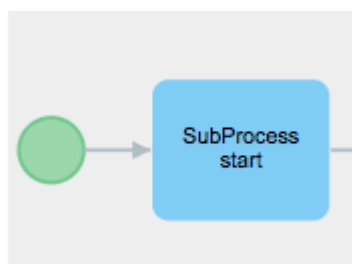
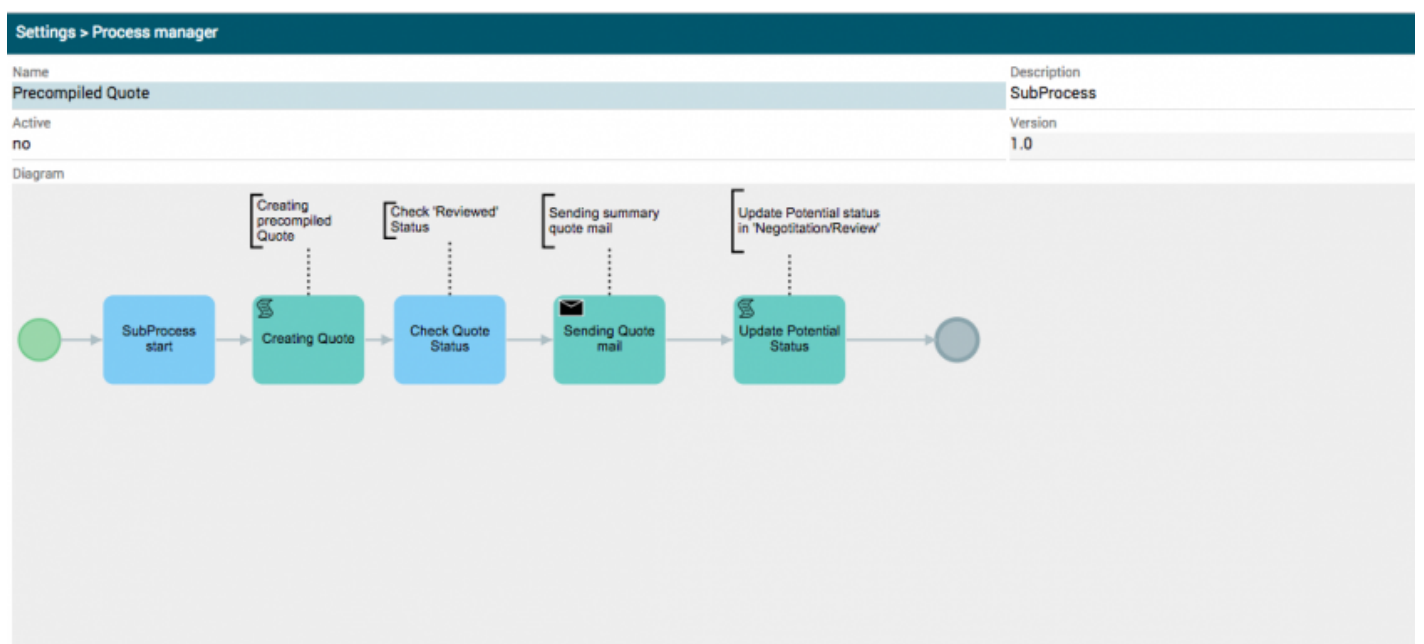
Time Custom Hr. 08 min 00

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"**.

Process Manager SAVE VERSION

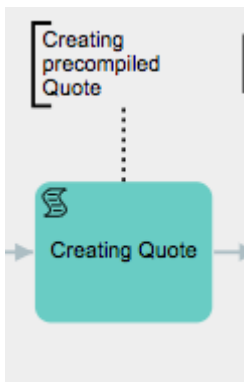
BPMN-Task: SubProcess start

Entity: --None--

When to run the check

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

Conditions



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.

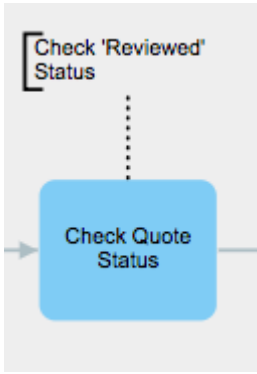
Action: Create entity SAVE CANCEL

Action title: Creatin precompiled Quoted

Module: Quote

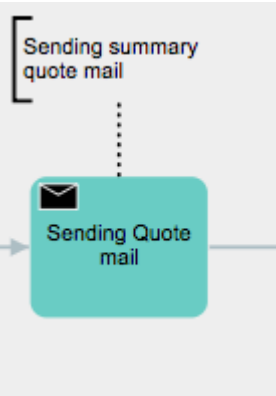
Quote Information

Subject	Select Option...	Potential Name	Other	ID
Quote No		Quote Stage	Created	
AUTO GEN ON SAVE		Contact Name	Contacts	Search...
Valid Till	Now			
	+ 30 days			
Carrier	FedEx	Total	0	Select Option...
Shipping	Select Option...	Inventory Manager	Assegnato a	Select Option...
Grand Total	0	Select Option...	Tax Type	
Discount Percentage		Select Option...	Discount Amount	Select Option...
SKH Amount	0	Select Option...	Account Name	Other
Assigned To	Other		Collegato 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.

The screenshot shows the configuration interface for a BPMN task titled "BPMN-Task: Check Quote Status". At the top right, there are "SAVE" and "CANCEL" buttons. The "Entity" is set to "[24] 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" followed by a dropdown arrow, the text "equals", another dropdown arrow, and "Revisionato" followed by a dropdown arrow and a trash icon. A "NEW CONDITION" button is located below the condition. A "NEW GROUP" button is on the right side of the conditions section.



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.

