

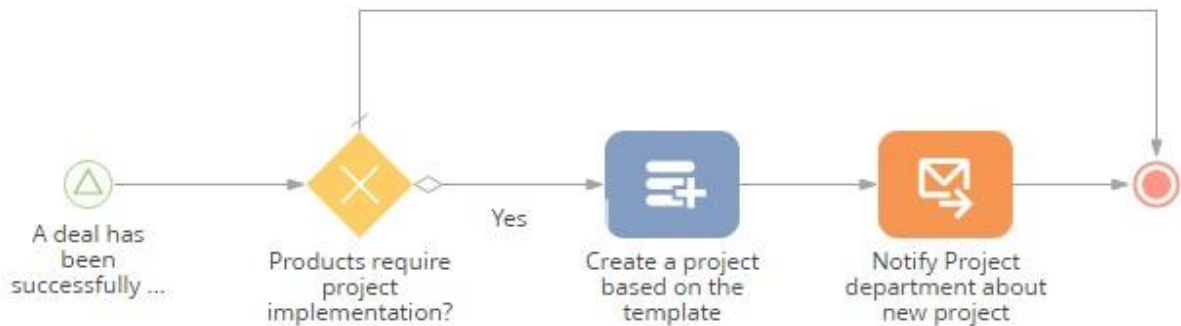
Starting a project

Characteristic	Description
Purpose	Creation of a project based on the template after successfully closed deal Notifying Project department about new project Maintaining a project template, taking into account project tasks required to implement individual products
Area	Opportunity management, Project management
Creatio compatibility	Sales Creatio, enterprise edition 7.10+
Required system objects	Base sections: <ul style="list-style-type: none">• Contacts• Accounts• Opportunities• Projects• Products

List of process participants

Role	Responsibilities
Sales manager	Client sales. Provision of client and project details to Project department.

Process description



Process step	Role	Step description
A deal has been successfully closed	Sales manager	Sales manager closes the deal (stage of the opportunity is "Closed won").
Products require project implementation?	Creatio	The system checks if the sold products (specified in the deal) need project implementation.
Create a project based on the template	Creatio	If at least one of the sold products needs project implementation, a new project is created based on the project template and deal details.
Notify Project department about new project	Sales manager	Sales manager notifies Project department about new project via email.

Implementation guidelines

1. Install the package using the [Installed applications] functionality in [System designer].
2. To create a project based on the template for selected products, revise the product catalog and select the [Project implementation] checkbox for products that need project implementation.
3. Specify default project type in the "Default project type" system setting.
4. Add the project with type [Template] in the [Projects] section, including steps below:
 - a. specify default project data,
 - b. add resources in the detail [List of resources] of the project, and
 - c. add project tasks in the detail [Structure] of the project (please, pay attention to required parameters: fill in the field [Product], if project task is specific for individual product; fill in the fields [Days from project start] and [Work duration, in days] for automatic calculation of project task dates).

5. Select project added above in the "Project template" system setting and save update.
6. Configure mailboxes for Sales managers in Creatio to send emails as part of the business process workflow.
7. The following system setting is required to send notification about new project – "Email of Project department".