

7 Configuring a Basic Process

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7.1 Configuring a Basic Process - Quote Approval

FLOW DESCRIPTION

When creating a quote with Quote Stage = “Created”, the process will be triggered and will present the members of the “Management” group with a process helper in popup mode, requesting their completion.

In case of confirmation, an internal notification will be sent to the assignee of the quote (which corresponds to the sales representative who is managing the quote).

Instead, in case of rejection, a notification email will be sent to the assignee of the quote (which corresponds to the sales representative who is managing the quote) containing any internal notes/comments useful for reviewing the quote.

If the popup is not completed by any user within two days, the system will send a reminder email to the members of the group.

In the event of an SMTP error in sending the non-approval email, the system will notify the members of the “IT Department” group by sending an internal notification.

ELEMENTS REQUIRED IN THE PROCESS

To do this process we will need the elements listed below:

- Condition Task
- Action Task
- Timer Boundary Event
- Gateway
- End Event

If their operation is not clear we recommend first consulting chapter 2 of the process manual.

FLOW CHART CONFIGURATION

We use the elements mentioned above to set up a diagram like the one shown in Figure 1

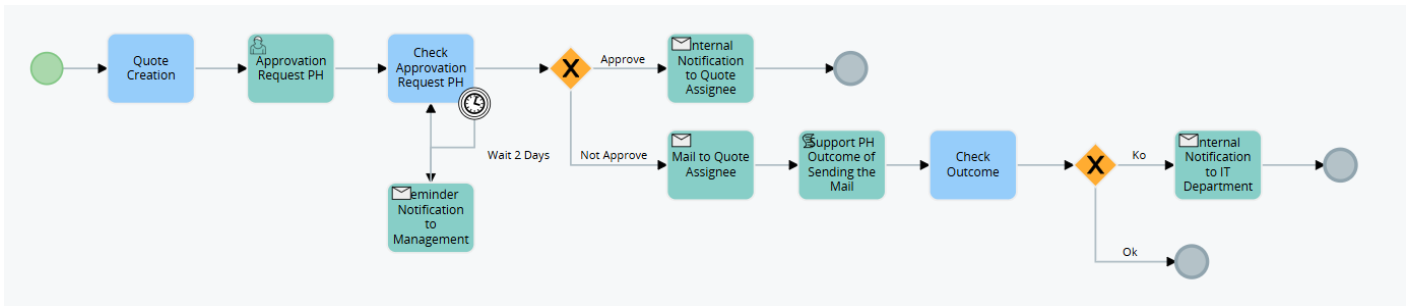


Figure 1

CONFIGURATION OF INDIVIDUAL ELEMENTS OF THE FLOW

Let's proceed with the configuration of the individual elements that make up the process flow.

Let's start with the Condition Task "Create estimate".

In the "When to run the check" section, select the "At creation" option to start the process only when the estimate is created with Estimate Stage = "Created" (Figure 2).

BPMN-Task: Quote Creation Task_0kya8m5

Entity: Quote

When to run the check

- on create
- on create / change
- on change
- every time the condition is true
- only the first time the process starts
- when executed subprocess
- on relation with: Documents

Conditions

Quote Stage equals Created

Buttons: Save, Cancel, New Group

Figure 2

In the UserTask "PH approval request" we configure a process helper in order to request the user for the information necessary for the approval of the estimate.

"Process Helper" block configuration:

-in the "Assigned to" field we statically insert the "Direction" group

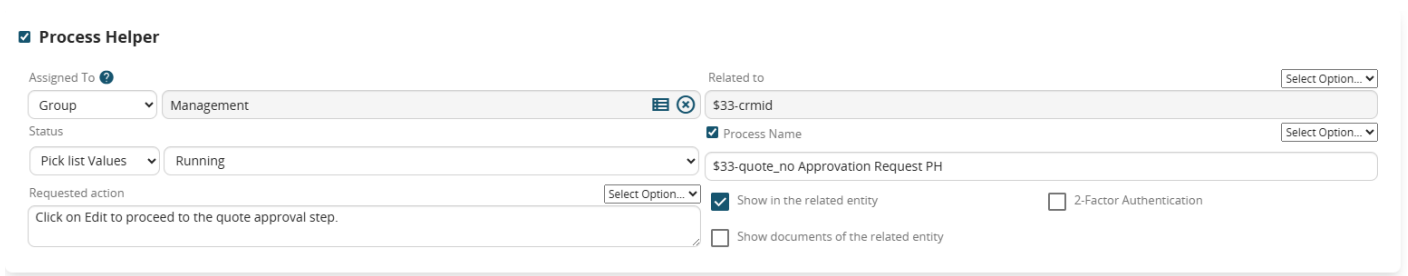
-in the "Linked to" field we insert the estimate ID

-in the "Process Name" field we indicate the name that will be assigned to the process in this specific step, then we insert the static part "PH approval request" followed by the value of the "Estimate Number" variable

-in the “Requested Action” field we insert a brief description of the activity to be performed

-we check the “Show in the linked entity” checkbox to activate the process helper popup mode

The result will be the one shown in Figure 3.



The screenshot shows a configuration form for a "Process Helper". It includes several fields and checkboxes:

- Assigned To:** A dropdown menu set to "Management".
- Related to:** A dropdown menu set to "\$33-crmid".
- Status:** A dropdown menu set to "Running".
- Process Name:** A dropdown menu set to "\$33-quote_no Approvation Request PH".
- Requested action:** A dropdown menu with the text "Click on Edit to proceed to the quote approval step." and a "Select Option..." button.
- Checkboxes:**
 - Show in the related entity
 - 2-Factor Authentication
 - Show documents of the related entity

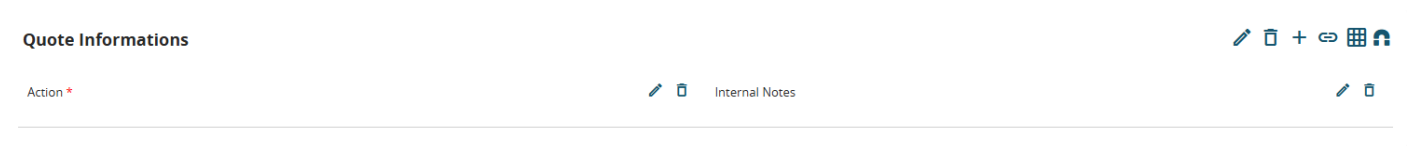
Figure 3

Dynamic form configuration:

In the dynamic form we create a single Block called “Quote Information” (see Figure 4) with the following fields:

1 “Action” (picklist field) with the following values: “empty”, “APPROVATE” and “DO NOT APPROVE” (see Figure 5)

2 “Internal Notes” (text area field)



The screenshot shows a dynamic form configuration for a block titled "Quote Informations". It features two fields:

- Action***: A picklist field.
- Internal Notes**: A text area field.

At the top right, there are icons for editing, deleting, adding, and other actions. At the bottom right, there are icons for editing and deleting the fields.

Figure 4

Field properties

Select the properties to change for this field

Label:

Permissions:

Mandatory Field:

Values mode:

Pick list Values:

Approve
 Not Approve

Default Value

Figure 5

Dynamic Form Reset Action Configuration

Let's create a "Dynamic Form Reset" action to reset the values of the fields in the form in the event that the process helper is forced to re-compile (see Figure 6).

Action: Reset dynamic form

Action title:

Dynamic form:

Empty fields:

Figure 6

In the Condition Task "PH Control approval request" we are going to perform a check on the "Action" field of the process helper form to direct the process in the branch related to the value entered by the user (see Figure 7)

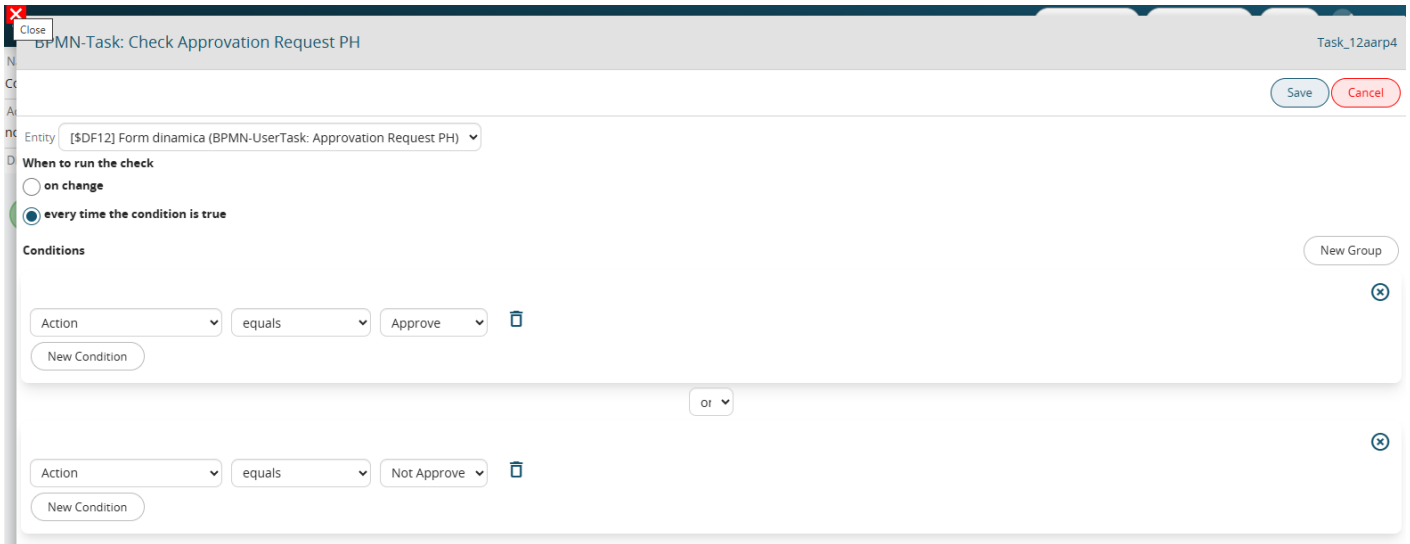


Figure 7

In the lower right edge of the task we place a Timer Boundary Event (Figure 8) and proceed with its configuration by inserting a 2-day time interval (Figure 9)

For further information, consult chapter 2.3 of the process manual.

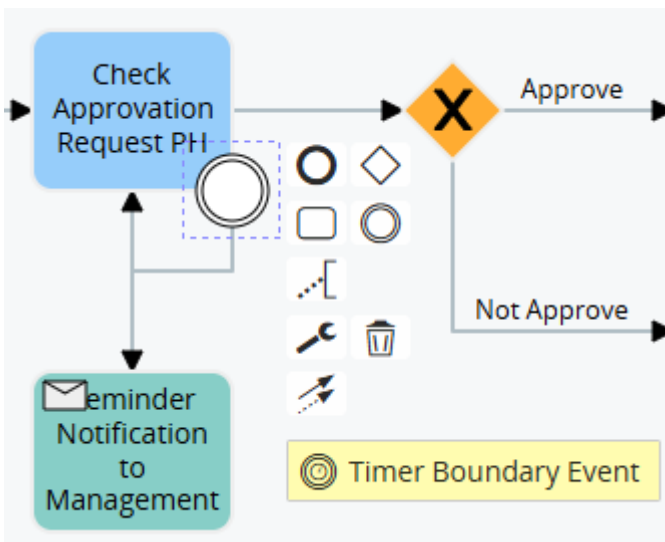


Figure 8

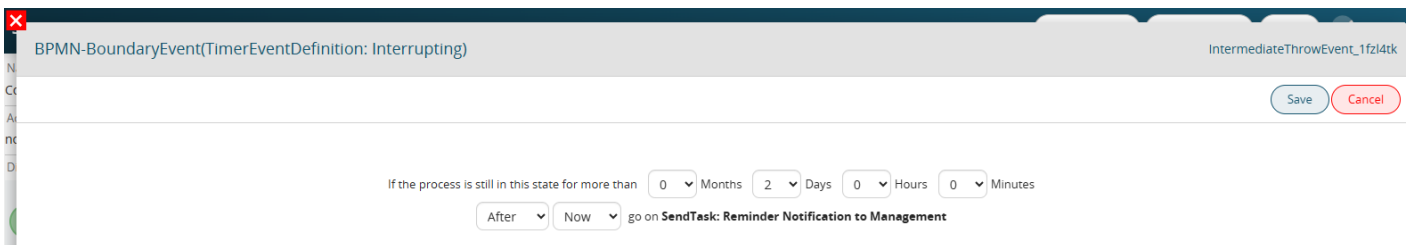


Figure 9

We are going to connect the SendTask “Send reminder notification to Management” to the Timer Boundary Event in order to send an internal notification to the members of the “Management” group in the event that the process remains stuck on the Condition Task “PH control approval

request” for more than 2 days (Figure 10)

For further information, see section 3.4 of the process manual.

Figure 10 shows the configuration for a 'Send notification' action. The action title is 'Reminder Notification to Management'. The notification description is 'Please fill the popup assigned to you to proceed with the process flow.' The creator is 'admin@vtenext.com (User)' and it is assigned to the 'Management' group. The related object is 'Other' with ID '\$33-crmid'.

Figure 10

In the next gateway we associate each group of conditions (inserted in the Condition Task “PH Control approval request”) with the corresponding branch to follow (see Figure 11)

Figure 11 shows the configuration for an Exclusive Gateway. The gateway is named 'BPMN-ExclusiveGateway'. It has two outgoing branches based on the 'Check Approval Request PH' condition. The 'Approve' branch leads to a 'SendTask: Internal Notification to Quote Assignee (Approve)'. The 'Not Approve' branch leads to a 'SendTask: Mail to Quote Assignee (Not Approve)'.

Figure 11

Configuration of the elements following the “APPROVE” branch

In the SendTask “Send internal notification to quote assignee” we configure the sending of an internal notification to the quote assignee (which corresponds to the sales representative who is managing the quote) to notify him of the approval of the quote (Figure 12).

For further information, see section 3.4 of the process manual.

Action: Send notification

Action title: Internal Notification to Quote Assignee

Notification Information

Description: Dear \$33-(assigned_user_id : (Users) last_name) \$33-(assigned_user_id : (Users) first_name), we want to inform that Quote \$33-quote_no has been approved by Management.

Quote No

Creator: admin@vtenext.com (User)

Assigned To: \$33-assigned_user_id

Related To: \$33-crmid

Figure 12

The endEvent must also be configured, because we have involved a process helper in the process, so it is necessary to activate a process helper inside it to set the process status to “Terminated” (see Figure 13)

BPMN-EndEvent

EndEvent_1bscabv

Save Cancel Advanced...

New action

Actions

No actions configured

Process Helper

Assigned To: admin@vtenext.com (User)

Related to: \$33-crmid

Status: Ended

Requested action: Select Option...

Process Name

Show in the related entity

2-Factor Authentication

Show documents of the related entity

Manage dynamic form

Add Block Import from dynaform... Import from module...

Figure 13

Configuration of the elements following the “DO NOT APPROVE” branch

In the SendTask “Send email to quote assignee” we configure the sending of an email to the quote assignee (which corresponds to the sales representative who is managing the quote) to notify him of the non-approval of the quote (Figure 14).

For further information, see section 3.5 of the process manual.

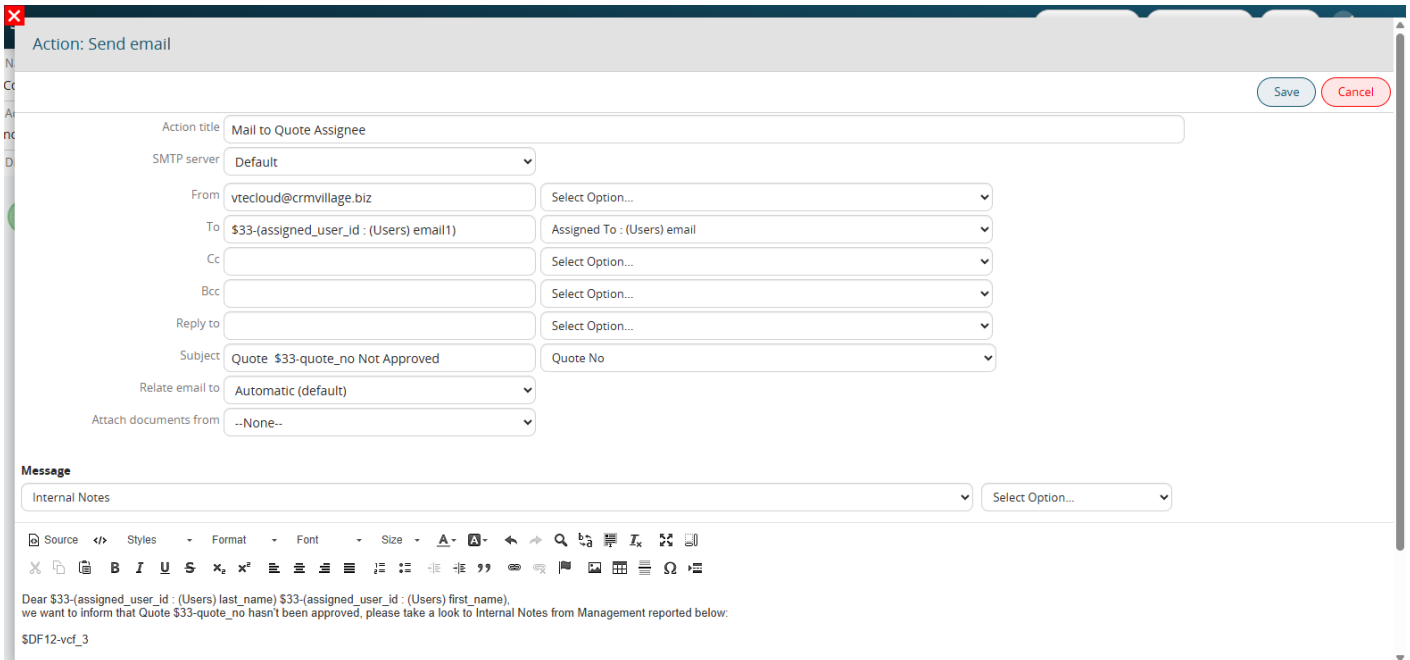


Figure 14

In the "Support PH for collecting email sending results" ScriptTask, we activate a process helper to use its dynamic form to log the email sending result (Figure 15).

Specifically, for each "Send email" action configured within the process, the system provides the following two variables (Figures 16 and 17):

- "Successful outcome?" → 1 is returned if there is NO SMTP error; otherwise, 0 is returned.
- "Error message" → the description of the SMTP error encountered is returned.

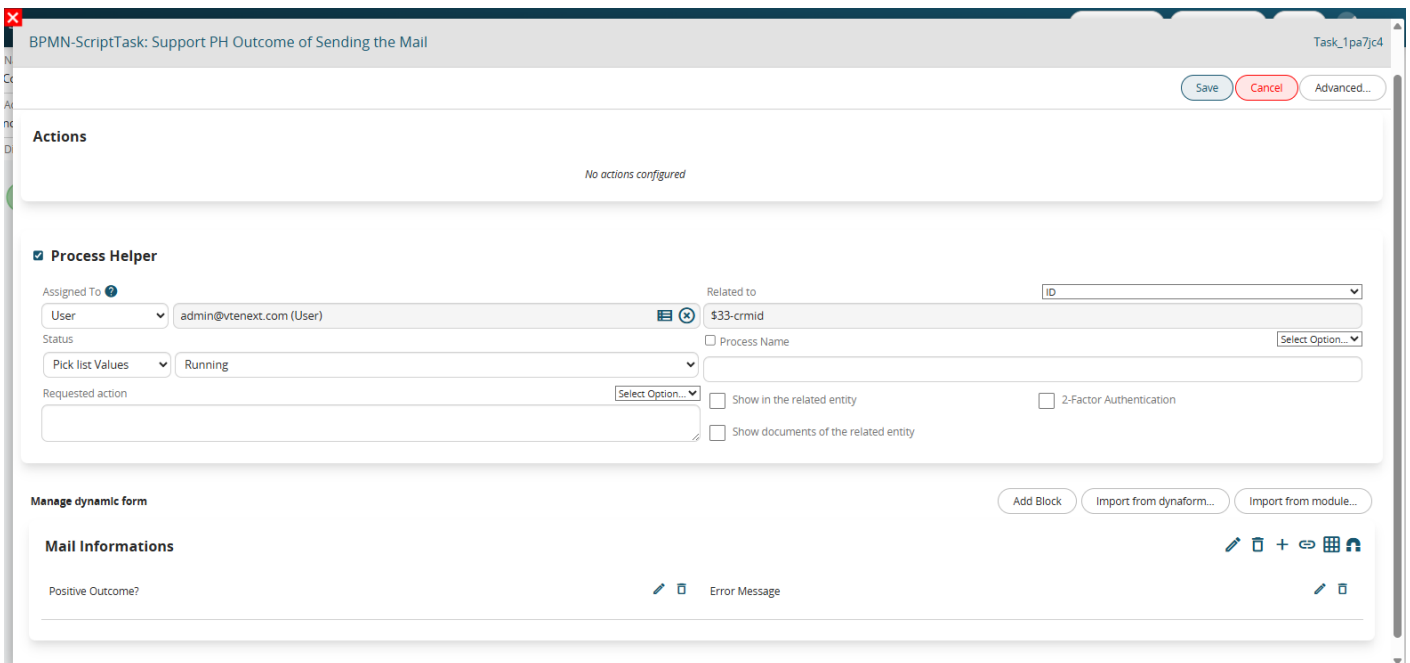


Figure 15

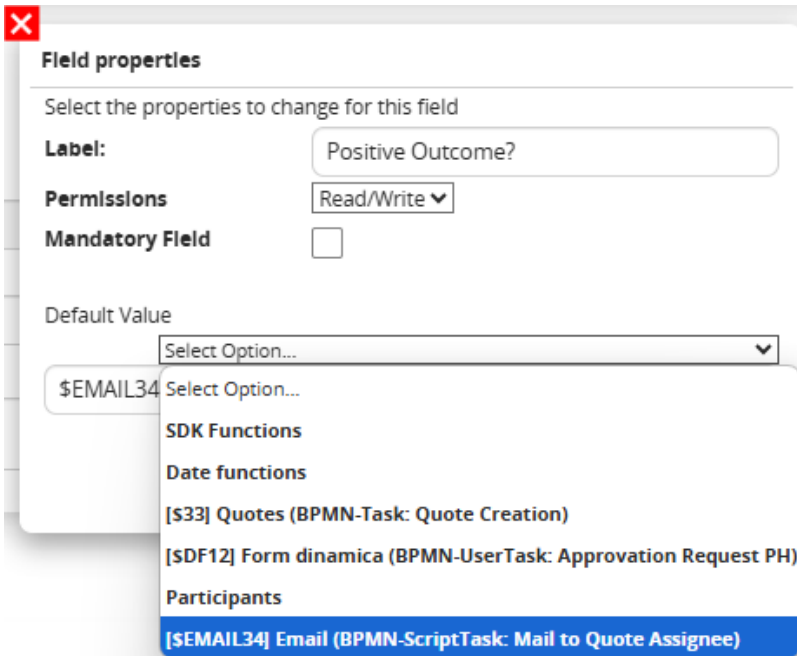


Figure 16

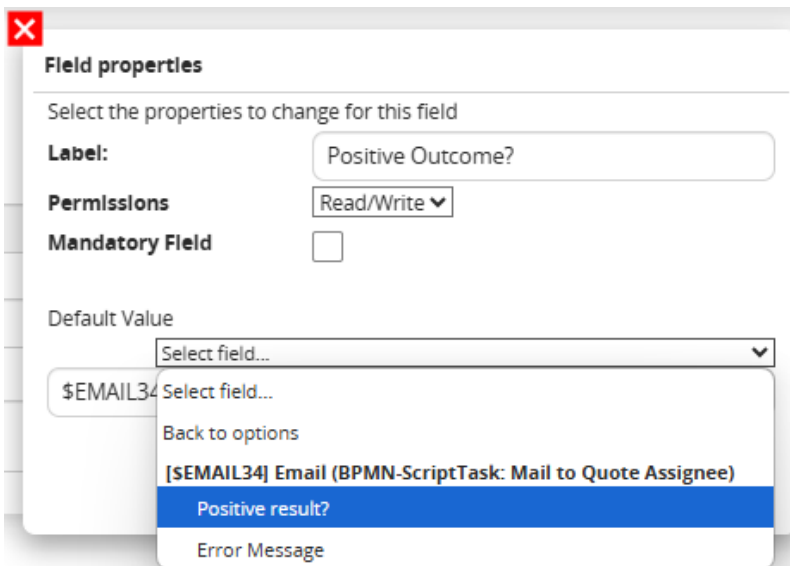


Figure 17

In the Condition Task “Check email sending result” we are going to perform a check on the “Positive outcome?” field of the process helper form to direct the process in the branch related to the email sending result (see Figure 18)

Figure 18

In the next gateway we associate each group of conditions (inserted in the Condition Task “Check email sending result”) with the corresponding branch to follow (see Figure 19)

Figure 19

Configuration of the elements following the “Ok” branch

The endEvent must also be configured, because we have involved a process helper in the process, so it is necessary to activate a process helper inside it to set the process status to “Terminated” (see Figure 20)

Figure 20

Configuration of the elements following the “Ko” branch

In the SendTask “Send internal notification to IT department” we configure the sending of an internal notification to the “IT Department” group to report the anomaly found in sending the email (Figure 21)

For further information, see section 3.4 of the process manual.

Action: Send notification

Action title: Internal Notification to IT Department

Notification Information

Description: An SMTP error verified, below the details:
Positive Outcome? -> \$DF13-vcf_2
Error Message -> \$DF13-vcf_3

Creator: admin@vtenext.com (User) | Assigned To: IT Department

Related To: \$33-crmid

Mail information - la mail viene inviata agli utenti che hanno scelto di essere notificati via Email

Subject: Process Notification | Sender mail: riccardo.panarotto@vtenext.com

Sender name: VTENEXT Notification System

Figure 21

The endEvent must also be configured, because we have involved a process helper in the process, so it is necessary to activate a process helper inside it to set the process status to “Terminated” (see Figure 22)

BPMN-EndEvent

EndEvent_12bjjxb

Save Cancel Advanced...

New action

Actions

No actions configured

Process Helper

Assigned To: admin@vtenext.com (User) | Related to: \$33-crmid

Status: Ended

Requested action: [Select Option...]

Process Name | Show in the related entity | 2-Factor Authentication | Show documents of the related entity

Figure 22

7.2 Activation of a Basic Process - Approval of Quotation

Now let's proceed with the vision of the process in action.

We then create a new quote by entering the requested information (Figure 1)

Creating Quote

Save Cancel

Account Information

Subject
New Hours Pack for Alpha Beta

Quote No
AUTO GEN ON SAVE

Valid Till
[Calendar Icon]

(dd-mm-yyyy)

Carrier
FedEx

Inventory Manager
admin@vtenext.com (User)

Assigned To
User admin@vtenext.com (User)

Potential Name
Search...

Quote Stage
Created

Contact Name
Search...

Shipping

Account Name
demoVTENEXT

Figure 1

After saving, the process will start by presenting a preview mask to each member of the "Direction" group (Figure 2).

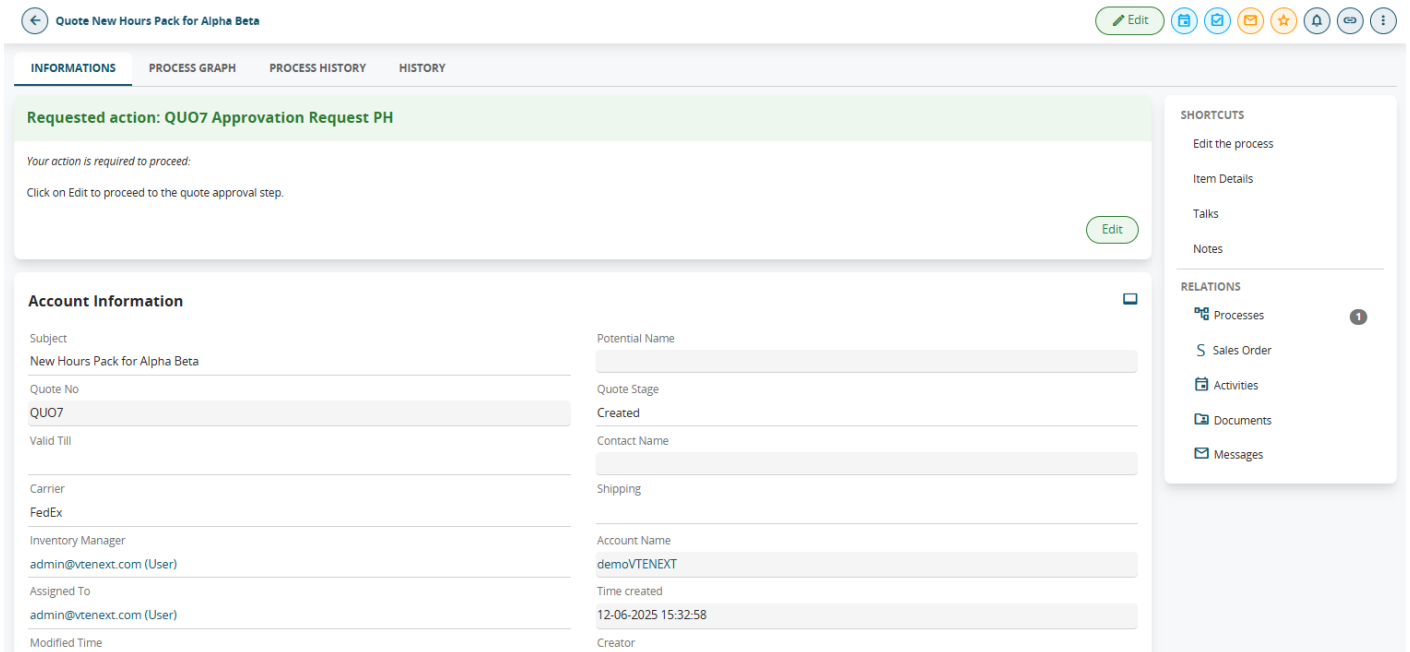


Figure 2

However, the task described above will only be visible by entering the estimate's details, so in this case it is possible to fill in the process helper through the "Processes" section accessible from the top right menu. (see Figure 3)

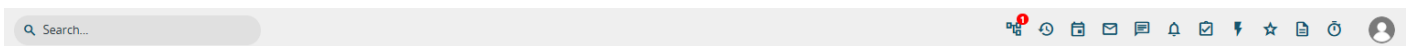


Figure 3

In fact, it contains all the pending processes assigned directly to the user or to any groups to which he or she belongs, so all you have to do is look for the line with the following information (see Figure 4):

-process name: "PH approval request QUO94"

-linked to: "New hour package for Alpha Beta" (i.e. the Subject of the estimate)

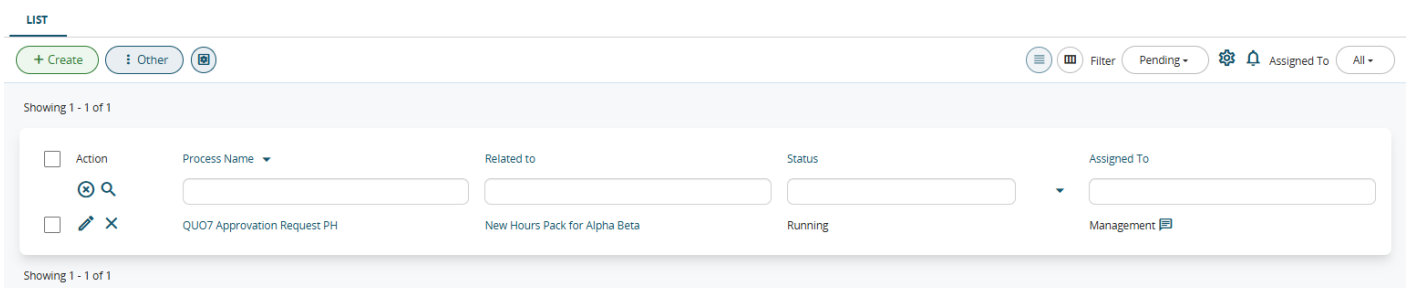


Figure 4

After that, simply click on the pencil to the left of the process name to be able to fill out the process helper (which will be displayed as if we were editing a module).

Once on the process helper form, the user will find themselves in front of the screen shown in Figure 5.

Process > QUO7 Approval Request PH

Save Cancel

Requested action

Your action is required to proceed:
Click on Edit to proceed to the quote approval step.

Quote Informations

Action

--Please select--
--Please select--
Approve
Not Approve

Internal Notes

Figure 5

If you want to simulate the approval of a quote, click on the value “APPROVARE” and save the process helper.

The system will automatically send an internal notification to the quote assignee (Figure 6).

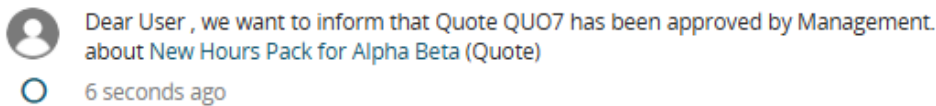


Figure 6

If you want to simulate a lack of approval of the estimate, click on the value “NOT APPROVE” and save the process helper.

The system will send an email to the assignee of the estimate (Figure 7).

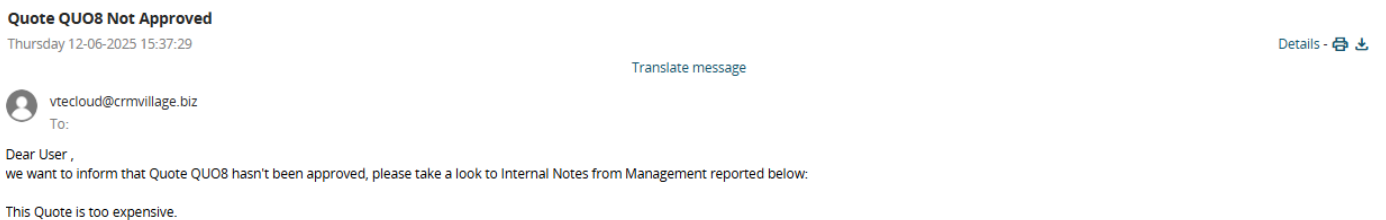


Figura 7