


1.2 Process Manager

Section: General Description and List of Features

























GENERAL DESCRIPTION

This section allows you to modify, create, import, and export BPMN processes. It is composed of the following columns:

- **Name** → represents the name of the process
- **Description** → represents the description of the process
- **Sub-processes** → indicates the list of any sub-processes linked to the current process
- **CRM Module** → indicates the name of the *main* CRM module involved in the process, which forms the basis for the initial (starting) conditions of the process
- **Active** → indicates whether the process is active (yes) or inactive (no)

 Settings > Process manager
Allow to create custom processes

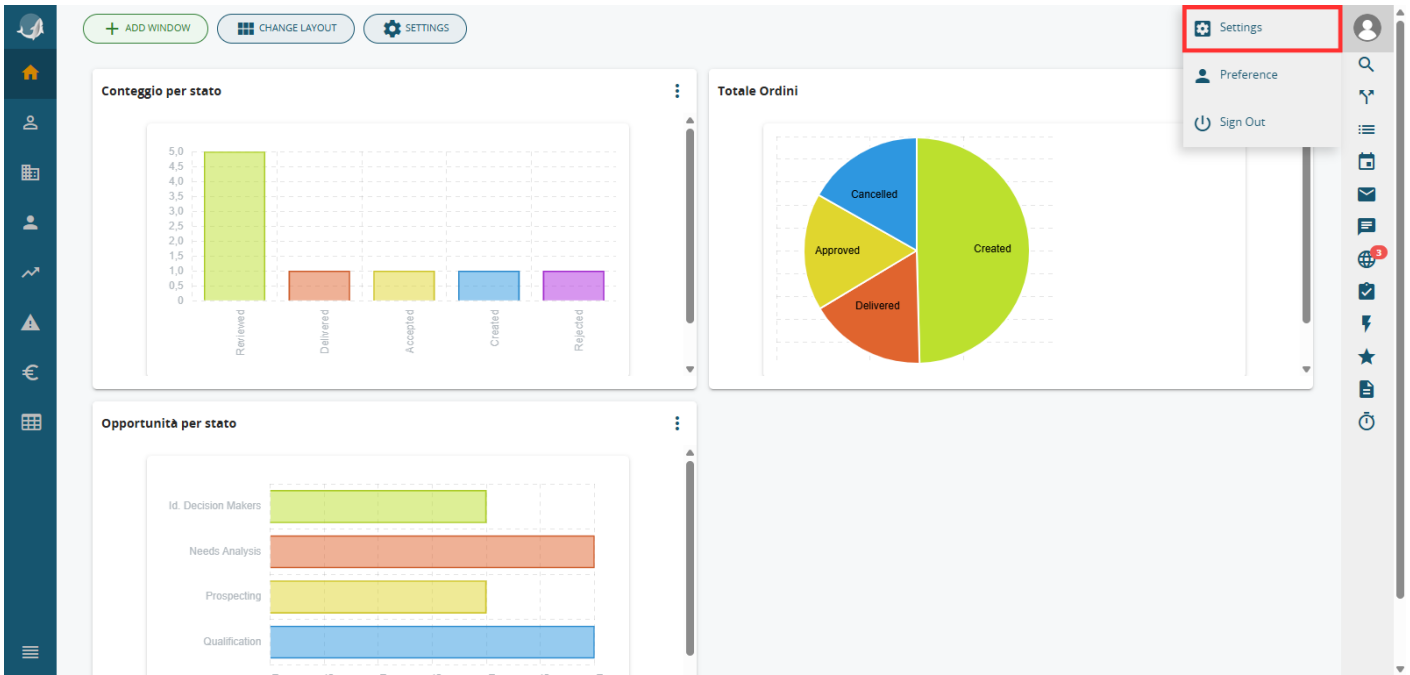
Show 50 entries Search:

Actions	Name <input type="text" value="Search for Name"/>	Description <input type="text" value="Search for Description"/>	Subprocesses <input type="text" value="Search for Subprocesses"/>	CRM Module <input type="text" value="Search for CRM Module"/>	Active <input type="text" value="Search for Active"/>
   	Expiration management 			Cases	yes
   	Set alert date 			Cases	yes
  	Lead conversion 			Leads	yes
   	70% hours exceeded 			Project Tasks	yes
   	90% hours exceeded 			Project Tasks	yes

Accessing the Process Manager Section with the “Next” Theme

To access the Process Manager section with the “Next” theme enabled, follow these steps:

- 1) Click on the profile icon, then select “Settings”



2) In the left-hand menu, click on the “Business Process Manager” section, then select “Process Manager”

Process manager

Search: NEW

Name	Description	Subprocesses	CRM Module	Active
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Reset Dynamic Form			Accounts	no
Reset Conditional Fields			Accounts	no
Link Entities and Link Static Entities			Accounts	no
Cycle Related Records			Accounts	no
Expiration management			Cases	yes
Set alert date			Cases	yes
Lead conversion			Leads	yes
Create Entity			Leads	no
Update Entity			Leads	no
Delete Entity			Leads	no
Send Email			Leads	no
Send Newsletter			Leads	no
Transfer Relationships			Leads	no

LIST OF FEATURES

Below is the list of main features:





- Delete process
- Export BPMN process
- Export VTE BPMN process
- Import VTE BPMN into an existing process
- Create process
- Import a new process from scratch

Delete Process

By clicking the button shown in the image, you can delete the selected process.





WARNING!: Deleting a process using the X button in the Process Manager section permanently deletes the process from all related tables in the DB.

Therefore, it is important to proceed with caution when using this function, as once deleted, there will be no way to restore the process and all pending instances associated with the affected records.

				Converti lead [R]			Leads	no
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Export BPMN Process

By clicking the button shown in the image, you can export only the graphical structure of the process, excluding its configuration.

				Converti lead [R]			Leads	no
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Export VTE BPMN Process

By clicking the button shown in the image, you can export the entire process (structure + configuration).

				Converti lead [R]			Leads	no
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Import VTE BPMN into an Existing Process

By clicking the button shown in the image, you can import a new version of the selected process.

				Converti lead [R]			Leads	no
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Create Process

To create a process, follow these steps:

- 1) Go to the Process Manager section (see the paragraph “Accessing the Process Manager Section with the Next Theme” or “Accessing the Process Manager Section with the Next22 Theme,” depending on the theme in use)
- 2) Click the **NEW** button located at the top right

Business Process Manager

Process manager

- Basic workflows
- Mail Converter
- Synchronizations
- Wizard creator
- Module creator
- Module settings
- Picklist editor
- Internationalized picklist
- Linked picklist
- Status fields permissions
- Condition based fields
- Encrypted fields
- Top menu settings
- Listview colors
- REST Webservices
- External applications

Settings > Process manager
Allow to create custom processes

Show 50 entries

Search:

Actions	Name	Description	Subprocesses	CRM Module	Active
	Reset Dynamic Form			Accounts	no
	Reset Conditional Fields			Accounts	no
	Link Entities and Link Static Entities			Accounts	no
	Cycle Related Records			Accounts	no
	Expiration management			Cases	yes
	Set alert date			Cases	yes
	Lead conversion			Leads	yes
	Create Entity			Leads	no
	Update Entity			Leads	no
	Delete Entity			Leads	no
	Send Email			Leads	no

3) Enter a name, an optional description, and then click on **“CREATE NEW”**

Settings > Process manager
Allow to create custom processes

Name

Description

Import... **Create New** Cancel

Once the previous steps are completed, the user will be directed to the screen for configuring the process flowchart (see chapter 1.4)

Import a New Process from Scratch

To import existing processes, after navigating to the “Process Manager” section, follow these steps:

1) Click the **NEW** button located at the top right

The screenshot shows the vtenext Business Process Manager interface. On the left is a dark sidebar with a menu including 'Process manager', 'Basic workflows', 'Mail Converter', 'Synchronizations', 'Wizard creator', 'Module creator', 'Module settings', 'Picklist editor', 'Internationalized picklist', 'Linked picklist', 'Status fields permissions', 'Condition based fields', 'Encrypted fields', 'Top menu settings', 'Listview colors', 'REST Webservices', and 'External applications'. The main content area is titled 'Settings > Process manager' with the subtitle 'Allow to create custom processes'. At the top right of the main area is a 'New' button. Below the title, there is a 'Show 50 entries' dropdown and a search bar. The main area contains a table with the following columns: 'Actions', 'Name', 'Description', 'Subprocesses', 'CRM Module', and 'Active'. Each column has a search input field. The table lists various actions such as 'Reset Dynamic Form', 'Reset Conditional Fields', 'Link Entities and Link Static Entities', 'Cycle Related Records', 'Expiration management', 'Set alert date', 'Lead conversion', 'Create Entity', 'Update Entity', 'Delete Entity', and 'Send Email'. The 'Active' column contains 'yes' or 'no' values.

2) Enter a name, an optional description, and then click on **“Import”**

Settings > Process manager
Allow to create custom processes

Name

Description

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