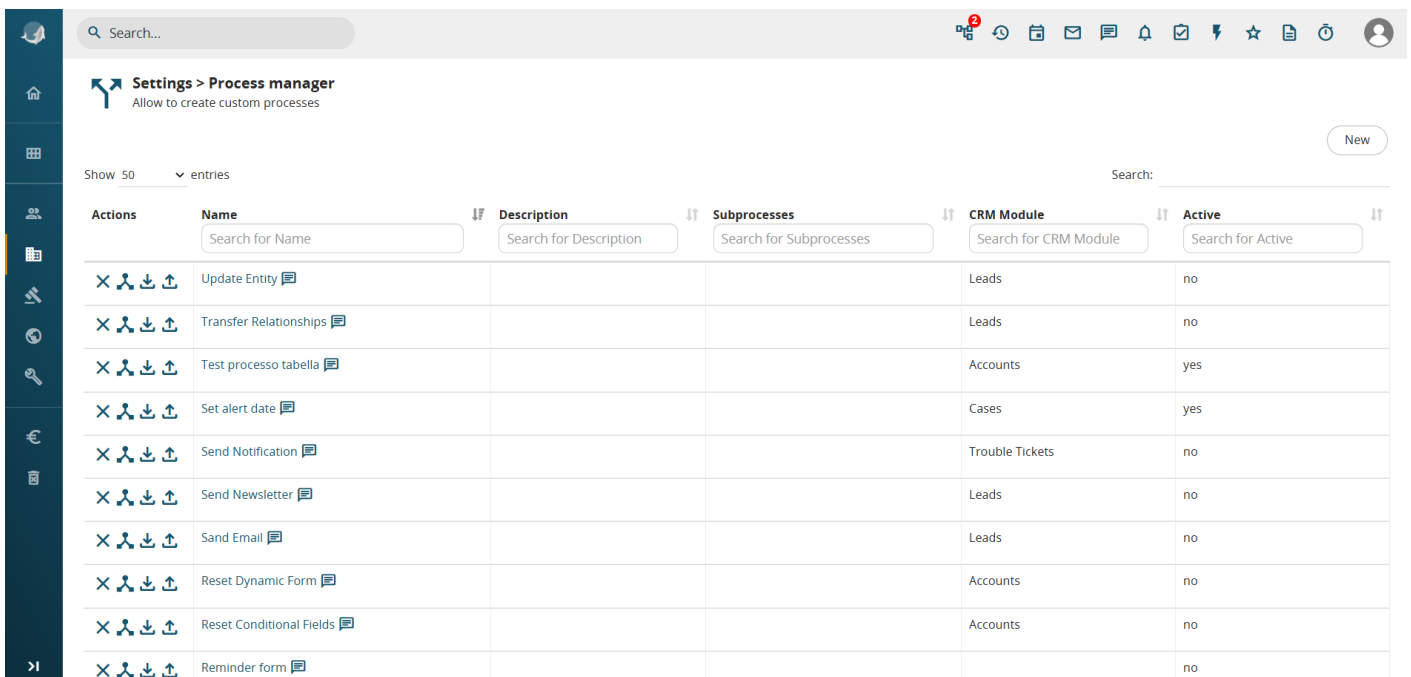


# 1.3 Flowchart Configuration and Left Menu

## FLOWCHART

To view the flowchart of an existing process, click on its name in the "Name" column of the "Process Manager" section. (Figure 1)



The screenshot shows the 'Settings > Process manager' interface. The page title is 'Settings > Process manager' with the subtitle 'Allow to create custom processes'. There is a search bar at the top right with a 'New' button. Below the search bar, there is a 'Show 50 entries' dropdown and a 'Search:' field. The main content is a table with the following columns: 'Actions', 'Name', 'Description', 'Subprocesses', 'CRM Module', and 'Active'. Each row represents a process action with icons for delete, edit, and share, and a status indicator.































Actions	Name	Description	Subprocesses	CRM Module	Active
  	Update Entity			Leads	no
  	Transfer Relationships			Leads	no
  	Test processo tabella			Accounts	yes
  	Set alert date			Cases	yes
  	Send Notification			Trouble Tickets	no
  	Send Newsletter			Leads	no
  	Sand Email			Leads	no
  	Reset Dynamic Form			Accounts	no
  	Reset Conditional Fields			Accounts	no
  	Reminder form				no

Figure 1

Within this section, you can configure all the elements included in the diagram by clicking directly on each one. (Figure 2 and Figure 3)

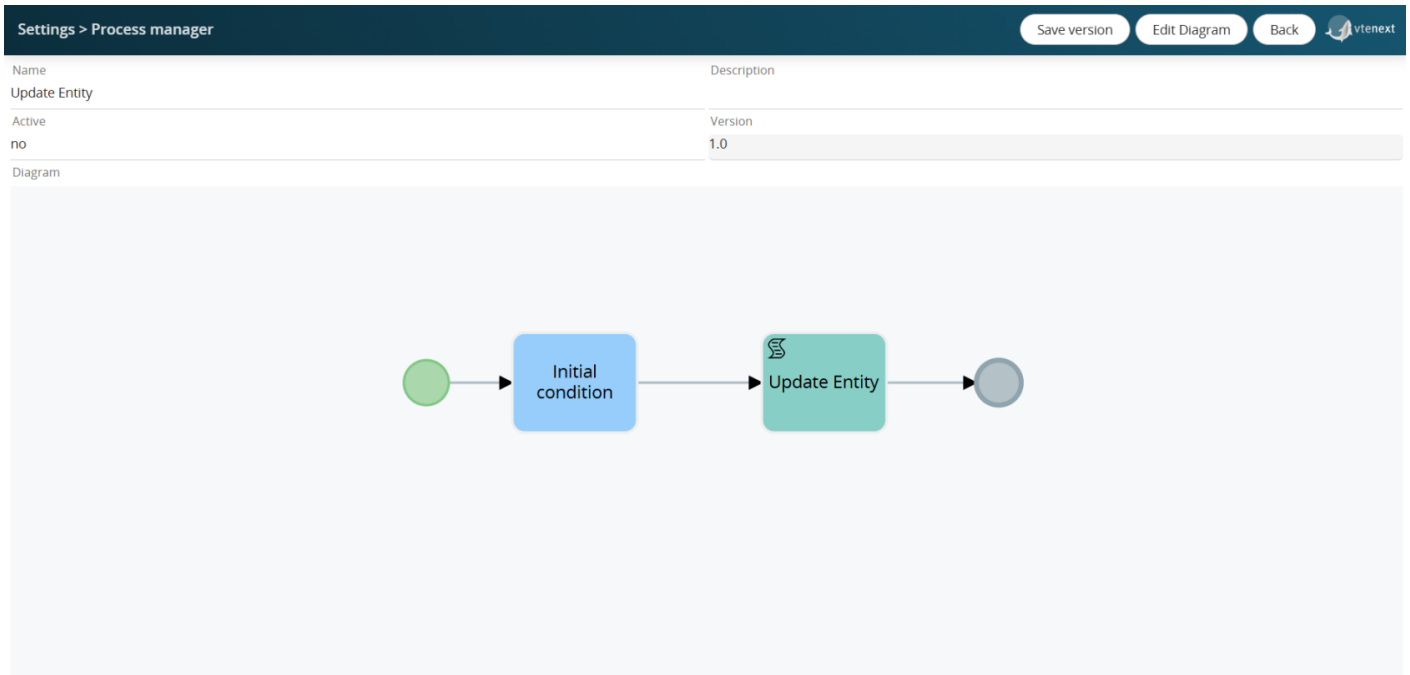


Figure 2

BPMN-Task: Initial condition Task\_10m5mbk

Save Cancel

Entity: Lead

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: Products

Conditions

Lead Status has changed to Converted

New Condition

New Group

Figure 3

N.B.: The configuration of individual elements will be covered in subsequent chapters.

To make changes to the process diagram, click the "Edit Diagram" button. (Figure 4)

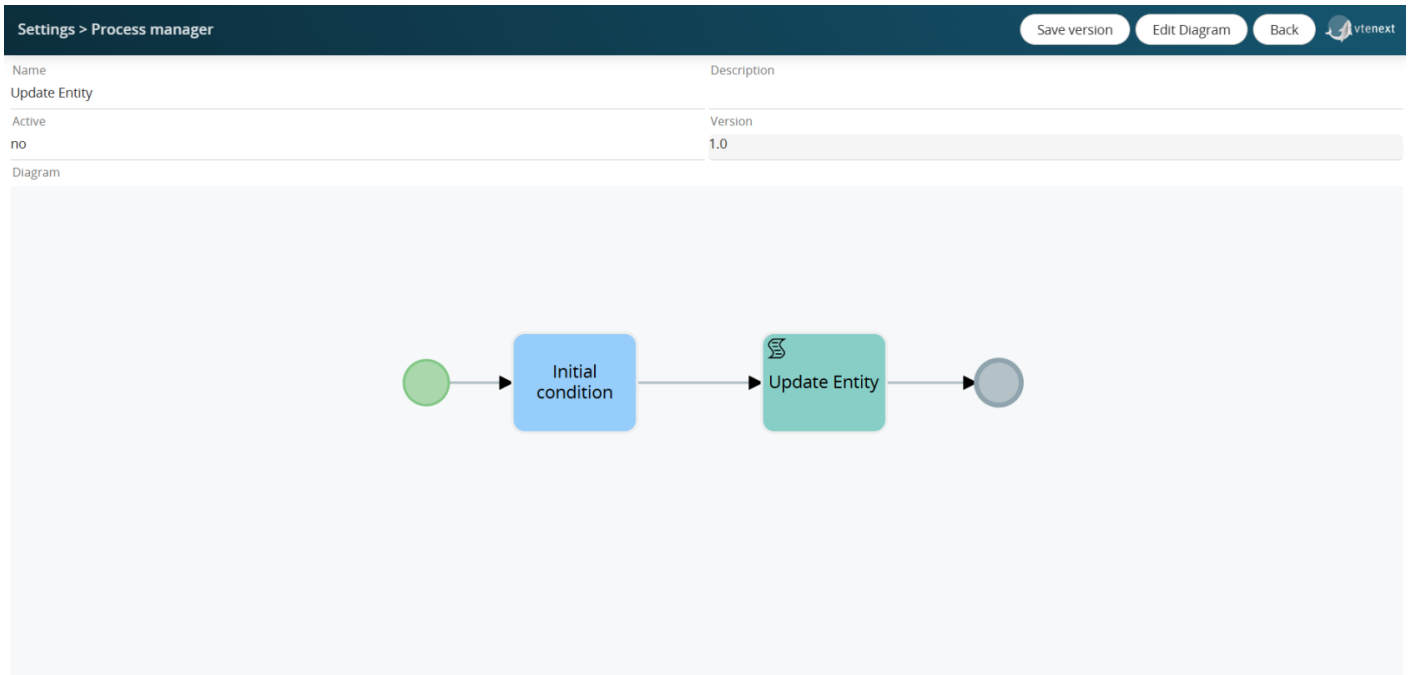


Figure 5

The elements used to construct the process diagram can also be quickly selected through a shortcut menu that becomes available by clicking on a specific element already involved. (Figure 6)

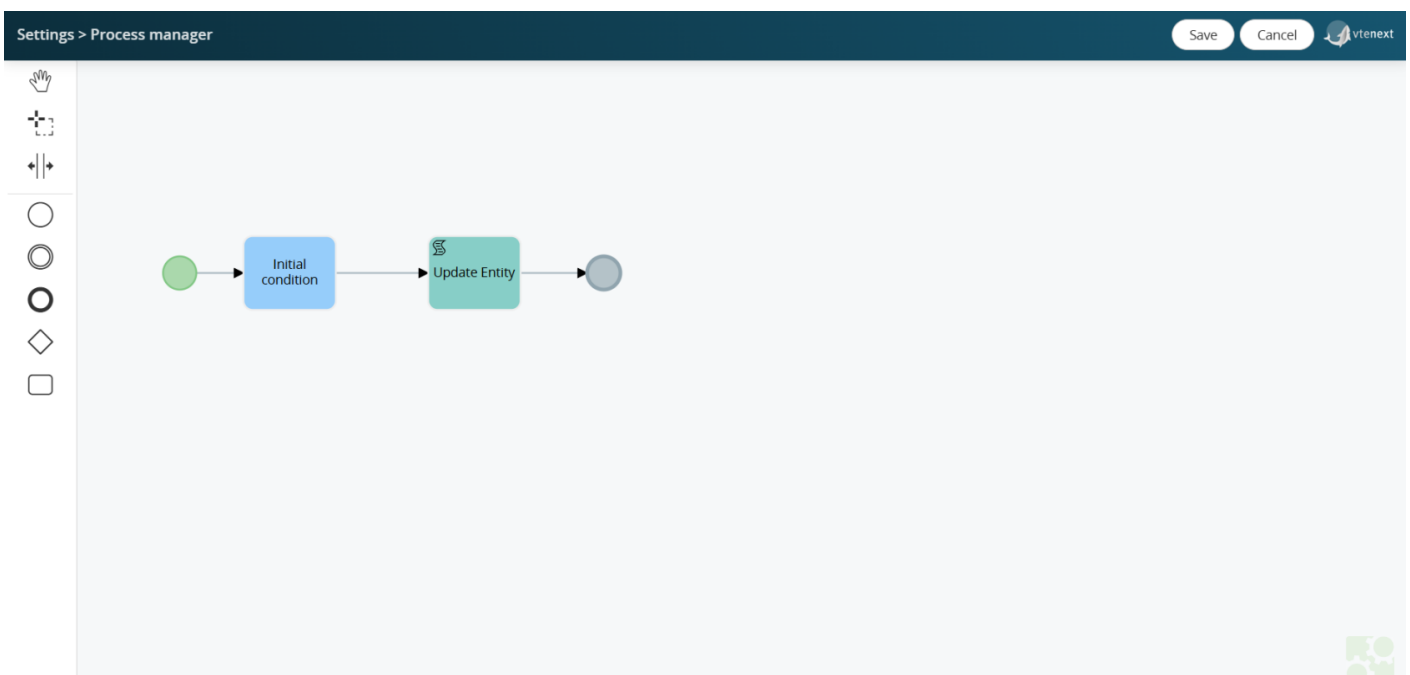














Figure 6

## LEFT MENU

This is a menu that can be used while editing the process diagram and includes:

- A quick selection of the main elements available for creating processes
- A set of useful functions for the easy and organized creation of process flows

	<b>Hand Tool</b>
	<b>Lasso Tool</b>
	<b>Create/Remove Space Tool</b>
	<b>Start Event</b>
	<b>Intermediate/Boundary Event</b>
	<b>End Event</b>
	<b>Gateway</b>
	<b>Task</b>
	<b>Sub Process</b>
	<b>DataObjectReference</b>
	<b>DataStoreReference</b>
	<b>Pool/Participant</b>

### **Hand Tool**

A useful tool for moving the view easily and efficiently.

### **Lasso Tool**

A useful tool for moving a group of tasks/elements at the same time, making the organization and structuring of the flow easier and faster.

### **Create/Remove Space Tool**

A useful tool for moving all tasks/elements at once, facilitating the easy and fast structuring of the flow.

## **Start Event**

Allows you to select and use the Start Event.

## **End Event**

Allows you to create and use the End Event.

## **Intermediate/Boundary Event Timer**

Allows you to create and use the Intermediate/Boundary Event.

## **Gateway**

Allows you to create and use Gateways.

## **Task**

Allows you to create and use Tasks.

## **Sub Process**

Allows you to create and use Sub Processes.

## **DataObjectReference**

This symbol allows for an action that is currently not yet implemented.

NOTE: As of version 24.08, it has been completely removed.

## **DataStoreReference**

This symbol allows for an action that is currently not yet implemented.

NOTE: As of version 24.08, it has been completely removed.

## **Pool/Participant**

Allows you to create areas in which parts of the process flow can be inserted. New tasks/elements cannot be created or moved outside these areas. It is also possible to textually indicate the actors

involved.

NOTE: As of version 24.08, it has been completely removed.

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Revision #8

Created 2019-04-18 11:26:26 UTC by Admin

Updated 2026-03-25 10:50:13 UTC by Tommaso