

16.2 Example: Configuring a Customer Reminder Management Process

FLOW DESCRIPTION

When invoked within a Standard process or another Tool process, an automatic email will be composed and sent to the email address of the Organization or Contact associated with the Ticket involved, using the parameters provided as input.

If the email cannot be sent due to an SMTP error, the process will wait for 1 calendar day before attempting to send the email again. This will continue until the email is successfully sent.

ELEMENTS REQUIRED IN THE TOOL PROCESS

To create this process, we will need the following elements:

- Condition Task
- Action Task
- Timer Intermediate Catch Event
- Gateway
- End Event

If you are not familiar with how these elements work, we recommend consulting Chapter 2 of the Process Manual before proceeding.

FLOW DIAGRAM CONFIGURATION

Use the elements listed above to configure a flow diagram as shown in Figure 1.

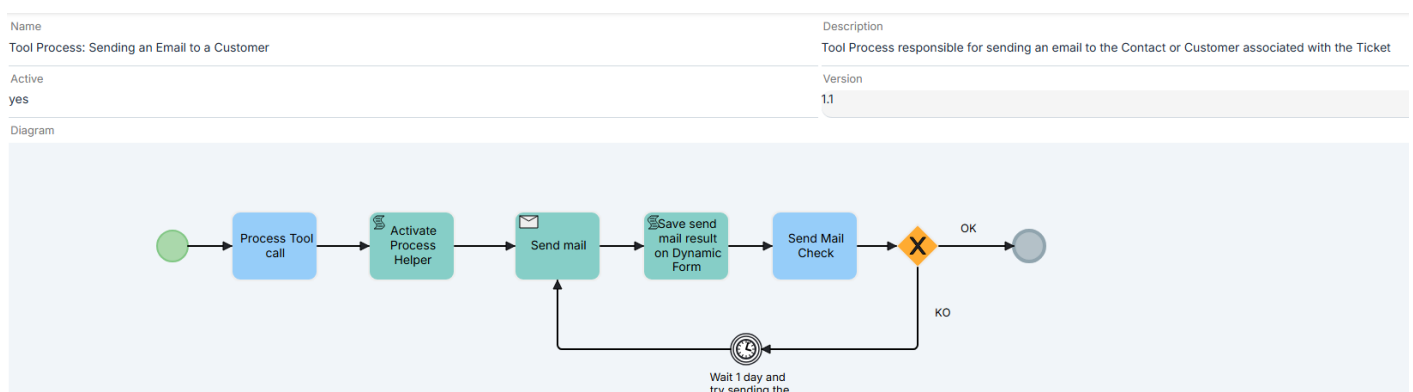


Figure 1

CONFIGURATION OF THE INDIVIDUAL FLOW ELEMENTS

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

We start with the "When the Tool Process is Called" Condition Task.

In the "When to execute the check" section, select the "When the Tool is called" option. In the "Conditions" section, enter the input parameters to be provided when the Tool Process is invoked from a Standard Process, namely:

- "Ticketid" parameter, with Type = "Entity" and Entity = "Ticket", configured as required (Figure 2).

"Recipient", "Subject", and "Body" parameters, with Type = "String", configured as required, together with the corresponding descriptions required by the system if the Tool Process is to be used as an MCP Tool (Figure 2).

BPMN-Task: Process Tool call

Entity: --None--

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 tool call

☐ on relation with:

Input schema

Actions	Parameter name	Type	Entity	Required	Description
	Ticketid	entity	Ticket	☒	The id of the helpdesk, with the format 'module_id' + 'x' + 'record_id'
	To	string	--None--	☒	Email address of the recipient of the automated email; for multiple addresses, provide the values separated by commas
	Subject	string	--None--	☒	Subject of the automated email to be sent by the tool process
	Body	string	--None--	☒	Body of the automated email to be sent by the tool process

Add row

Figure 2

In the "Activate Process Helper" Script Task, we activate a Process Helper in order to display, when the process is triggered on the affected record, the path followed by the Tool Process and its related logs within the "Process Graph" tab.

For further details, refer to Chapter 6.5 (Figure 3).

-in the "Assigned To" field, leave the default value proposed by the system, i.e. the user configuring the Tool Process, as there is no Dynamic Form associated with it.

-in the "Related To" field, leave the default value proposed by the system, the Ticketid.

BPMN-ScriptTask: Activate Process Helper Activity_1f00fxu

Save Cancel Advanced...

AI actions Other actions Import actions from...

Actions

No actions configured

Process Helper

Assigned To User mario.rossi@email.it (Mario Rossi) Related to \$48-crmid Select Option...

Status Pick list Values Running Process Name Select Option...

Requested action Select Option... Show in the related entity 2-Factor Authentication

Show documents of the related entity

Manage dynamic form Configure Shortcuts Add Block Import from dynaform... Import from module...

Figure 3

In the "Send Email" Send Task, configure an automatic email-sending action (Figure 4), entering the values contained in the Tool Process input parameters through the dedicated section available in the "Select Options..." picklist (Figures 5 and 6).

Action: Send email Save Cancel

Action title Send mail

Execution mode Standard: the execution process waits for the action to complete before proceeding to the next one

SMTP server Global

From vtecloud@vtenext.com Select Option...

To \$TOOLIN-To Select Option...

Cc Select Option...

Bcc Select Option...

Reply to noreply@vtenext.com Select Option...

Subject \$TOOLIN-Subject Select Option...

Relate email to Automatic (default)

Attach documents from --None--

Message

Select Option... Select Option...

Source Styles Format Font Size A B I U S X X Text color Background color Link Unlink Image Table Code Indent Outdent Align left Align center Align right Align justified Undo Redo Find Replace Print Fullscreen Help

\$TOOLIN-Body

Figure 4

Select Option...

Select Option...

SDK Functions

Date functions

[\$48] Trouble Tickets (BPMN-Task: Ticketid)

[\$DF6] Form dinamica (BPMN-ScriptTask: Salvataggio esito invio mail su Form Dinamica)

Input schema

[\$EMAIL49] Email (BPMN-ScriptTask: Send mail)

Input schema

Figure 5

Select field...

Back to options

Input schema

- To
- Subject
- Body

Figure 6

In the "Save Email Sending Result to Dynamic Form" Script Task, configure a Process Helper in order to use its Dynamic Form to store the result of the email sending operation.

"Process Helper" Block configuration:

-in the "Assigned To" field, leave the default value proposed by the system, i.e. the user configuring the Tool Process, as the associated Dynamic Form will not be displayed to any users involved in the process.

-in the "Related To" field, leave the default value proposed by the system, the Ticketid.

The result will be as shown in Figure 7.

☒ **Process Helper**

Assigned To User mario.rossi@email.it (Mario Rossi)

Related to \$48-crmid Select Option...

Status Pick list Values Running

Requested action Select Option...

☐ Process Name Select Option...

☐ Show in the related entity

☐ Show documents of the related entity

☐ 2-Factor Authentication

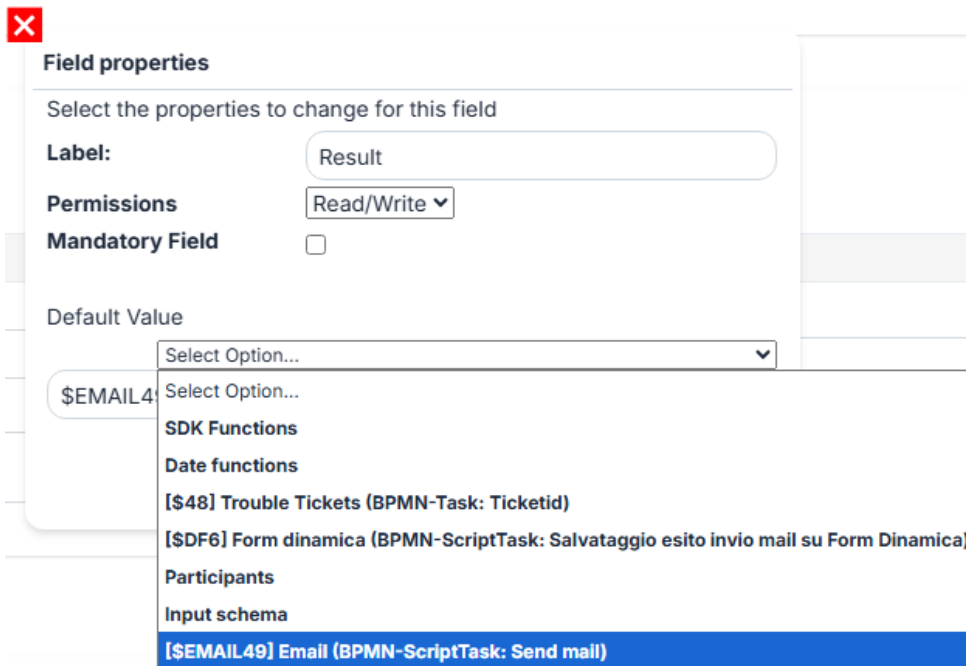
Figure 7

Dynamic Form configuration:

In the Dynamic Form, create the "Save Email Sending Result to Dynamic Form" block.

For each "Send Email" action configured within the process, the system makes the following two variables available through the "Select Options..." picklist (Figures 8 and 9):

- "Successful?" → returns 1 if there is no SMTP error; otherwise, it returns 0
- "Error Message" → returns the description of the SMTP error encountered



Field properties

Select the properties to change for this field

Label: Result

Permissions Read/Write ▼

Mandatory Field ☐

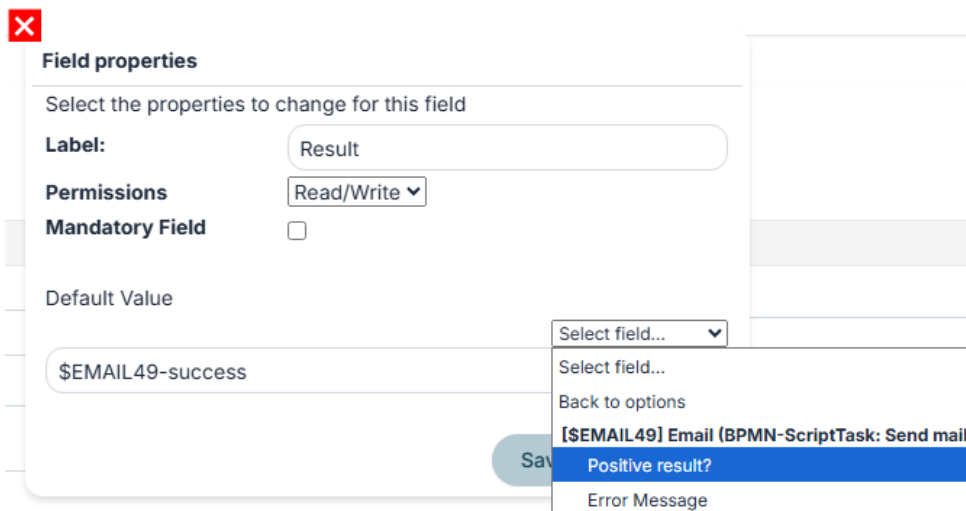
Default Value

Select Option... ▼

\$EMAIL4 Select Option...

- SDK Functions
- Date functions
- [\$48] Trouble Tickets (BPMN-Task: Ticketid)
- [\$DF6] Form dinamica (BPMN-ScriptTask: Salvataggio esito invio mail su Form Dinamica)
- Participants
- Input schema
- [\$EMAIL49] Email (BPMN-ScriptTask: Send mail)**

Figure 8



Field properties

Select the properties to change for this field

Label: Result

Permissions Read/Write ▼

Mandatory Field ☐

Default Value

\$EMAIL49-success

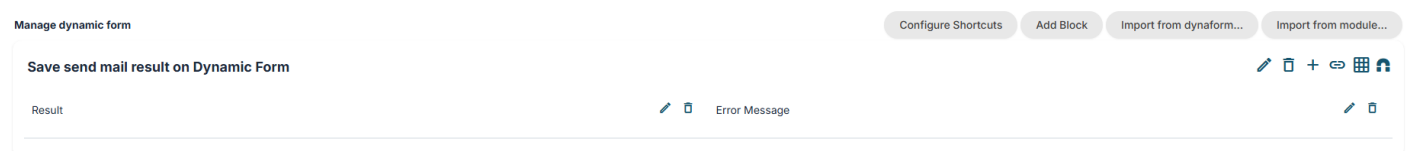
Select field... ▼

- Select field...
- Back to options
- [\$EMAIL49] Email (BPMN-ScriptTask: Send mail)**
- Positive result?**
- Error Message

Save

Figure 9

We then recreate equivalent fields within the Dynamic Form in order to store these values (Figure 10).



Manage dynamic form

Configure Shortcuts Add Block Import from dynaform... Import from module...

Save send mail result on Dynamic Form

Result

Error Message

Figure 10

Reset Dynamic Form action configuration

Finally, create a "Reset Dynamic Form" action to ensure that the values in the form fields are reset if the Process Helper is forced to run again (see Figure 11).

Figure 11

In the "Email Send Check" Condition Task, perform a check on the "Result" field of the Process Helper form in order to direct the process to the appropriate branch based on the value contained in that field (see Figure 12).

Figure 12

In the following Gateway, associate each group of conditions configured in the "Email Send Check" Condition Task with the corresponding branch to be followed (see Figure 13).

Figure 13

Configuration of the elements following the "OK" branch

Activate a Process Helper in the End Event. Since a Process Helper has been used within the process, it is necessary to activate a Process Helper within the End Event in order to set the process status to "Completed" (see Figure 14).

BPMN-EndEvent EndEvent_03b1vu8

Save Cancel Advanced...

AI actions Other actions Import actions from...

Actions

No actions configured

☒ **Process Helper**

Assigned To: User mario.rossi@email.it (Mario Rossi)

Status: Pick list Values Ended

Requested action: Select Option...

Related to: \$48-crmid Select Option...

☐ Process Name Select Option...

☐ Show in the related entity

☐ Show documents of the related entity

☐ 2-Factor Authentication

Manage dynamic form

Configure Shortcuts Add Block Import from dynaform... Import from module...

Figure 14

Configuration of the elements following the "KO" branch

In the "Wait 1 day and try sending the email again" timer of type "Intermediate Catch Event", configure it to "Wait 1 day after Now" (Figure 15).

BPMN-IntermediateCatchEvent(TimerEventDefinition): Wait 1 day and try sending the email again IntermediateThrowEvent_1jqhdm

Save Cancel

Wait: 0 Months 1 days 0 Hours 0 Minutes

After Now to go on SendTask: Send mail

Figure 15

Invocation from a Standard Process

A Tool Process such as the one just configured can be useful within a Standard Process that requires automatic emails to be sent with content that varies depending on the part of the flow involved, such as the one shown in Figure 16.

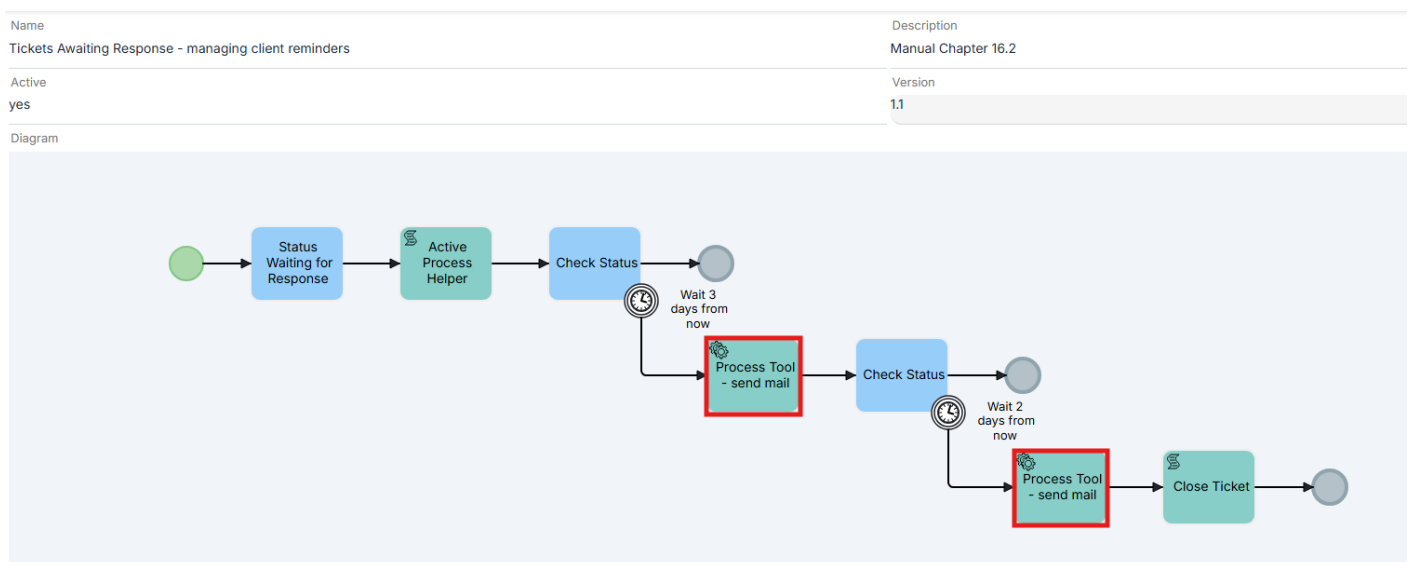


Figure 16

This Standard Process is triggered when the Ticket Status is changed to "Awaiting Reply" and waits for the status to change within 3 calendar days.

If the status does not change after 3 days, a first automatic email is sent by invoking the Tool Process through the configuration shown in Figures 17 and 18.

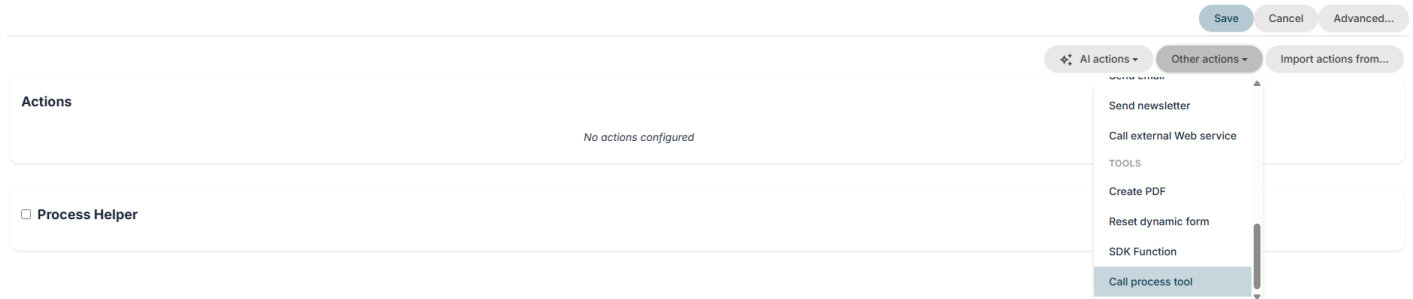


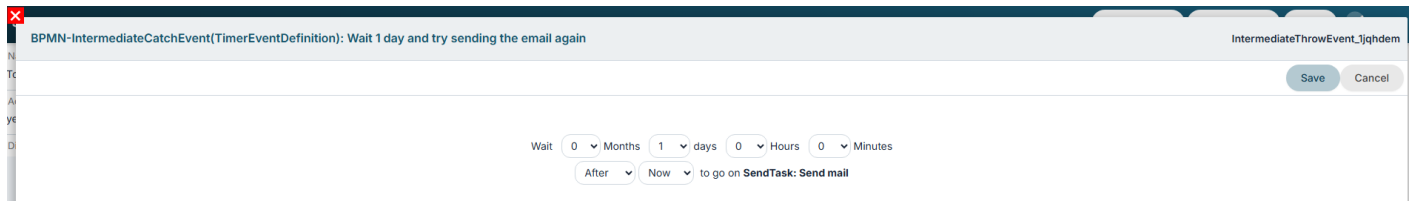
Figure 17

A screenshot of a configuration window titled 'Action: Call process tool'. It has 'Save' and 'Cancel' buttons at the top right. The form contains several fields: 'Action title' with the value 'Process Tool - send mail'; 'Execution mode' with a dropdown showing 'Background: the process stops and the action is executed in background by worker or cron'; and 'Process tool' with a dropdown showing 'Tool Process: Sending an Email to a Customer'. Below these is a 'Description' field with the text 'Tool Process responsible for sending an email to the Contact or Customer associated with the Ticket'. The 'Input schema' section contains four fields: 'Ticketid' (reference - HelpDesk) with value '\$47-crmid' and description 'The id of the helpdesk, with the format 'module_id' + 'x' + 'record_id'; 'To' (string) with value '\$47-(parent_id : (Accounts) email)\$47-(parent_id : (Contacts) email)' and description 'Email address of the recipient of the automated email; for multiple addresses, provide the values separated by commas'; 'Subject' (string) with value '\$47-ticket_no - Waiting for Response' and description 'Subject of the automated email to be sent by the tool process'; and 'Body' (string) with value 'Dear Customer, we have been awaiting your reply regarding ticket \$47-ticket_no for three days; please respond as soon' and description 'Body of the automated email to be sent by the tool process'. Each field has a 'Select Option...' dropdown.

Figure 18

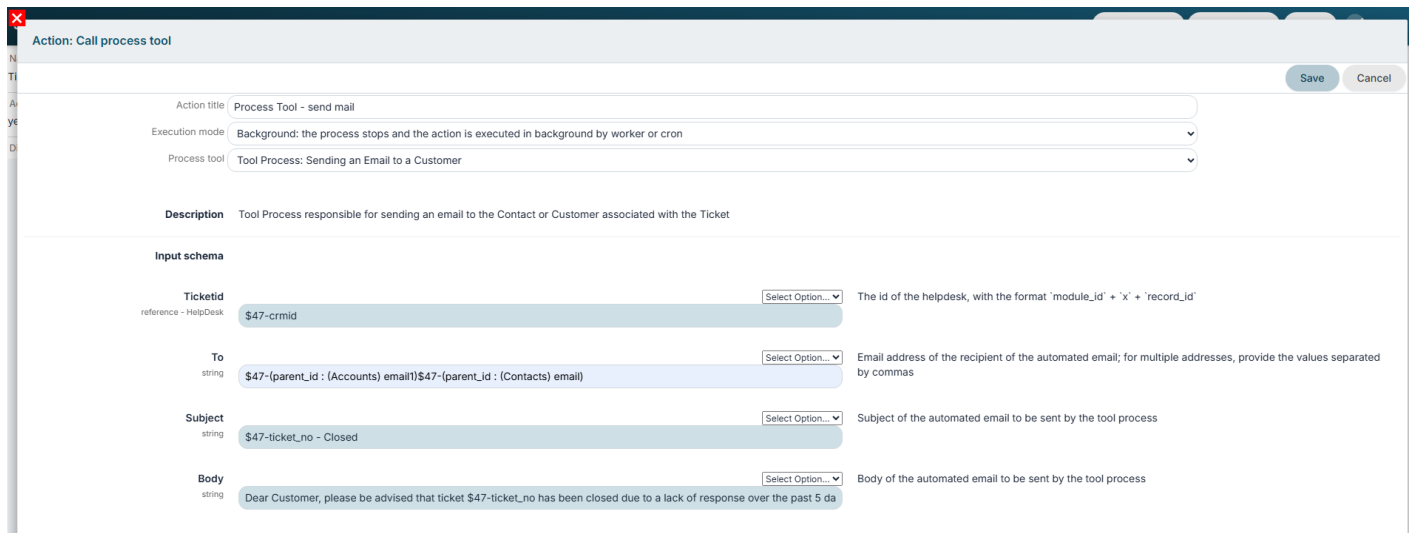
- "Ticketid" → the Ticket ID.
- "Recipient" → the value of the "Email" field of the Organization or Contact specified in the "Related To" field of the affected Ticket.
N.B: Without performing any dedicated checks beforehand, the values of both fields have been concatenated.
Since the "Related To" field can never contain both an Organization and a Contact at the same time, only one of the two variables will actually return a value.
- "Subject" → the internal Ticket number followed by the fixed string " - Waiting for Response".
- "Body" → the fixed string "Dear Customer, we have been awaiting your reply regarding ticket " + Internal Ticket number + " for three days; please respond as soon as possible so that we can resolve your issue."

After the email is sent, the process waits for another 2 days. If the Status has remained unchanged from its initial value, a second automatic email is sent by invoking the same Tool Process through the configuration shown in Figures 19 and 20. The Ticket is then closed by changing its Status to "Closed".



The screenshot shows a BPMN configuration window titled "BPMN-IntermediateCatchEvent(TimerEventDefinition): Wait 1 day and try sending the email again". The window has a "Save" button and a "Cancel" button. Below the title bar, there is a configuration area with a "Wait" section. The "Wait" section has a dropdown menu set to "Months", a text input field with "1", a dropdown menu set to "days", a text input field with "0", a dropdown menu set to "Hours", and a text input field with "0". Below this, there is a dropdown menu set to "After", a dropdown menu set to "Now", and a text input field with "to go on SendTask: Send mail".

Figure 19



The screenshot shows a BPMN configuration window titled "Action: Call process tool". The window has a "Save" button and a "Cancel" button. Below the title bar, there is a configuration area. The "Action title" is "Process Tool - send mail". The "Execution mode" is "Background: the process stops and the action is executed in background by worker or cron". The "Process tool" is "Tool Process: Sending an Email to a Customer". Below this, there is a "Description" field with the text "Tool Process responsible for sending an email to the Contact or Customer associated with the Ticket". Below the description, there is an "Input schema" section. The "Input schema" section has four fields: "Ticketid" (reference - HelpDesk) with the value "\$47-crmid", "To" (string) with the value "\$47-(parent_id : (Accounts) email)\$47-(parent_id : (Contacts) email)", "Subject" (string) with the value "\$47-ticket_no - Closed", and "Body" (string) with the value "Dear Customer, please be advised that ticket \$47-ticket_no has been closed due to a lack of response over the past 5 da".

Figure 20

- "Ticketid" → the Ticket ID.
- "Recipient" → the value of the "Email" field of the Organization or Contact specified in the "Related To" field of the affected Ticket.
- N:B: Without performing any dedicated checks beforehand, the values of both fields have been concatenated. Since the "Related To" field can never contain both an Organization and a Contact at the same time, only one of the two variables will actually return a value.
- "Subject" → the internal Ticket number followed by the fixed string "- Closed".
- "Body" → the fixed string "Dear Customer, please be advised that ticket " + Internal Ticket number + " has been closed due to a lack of response over the past 5 days; should you need further assistance, please open a new ticket."

Revision #1

Created 2026-08-11 13:52:16 UTC by Riccardo

Updated 2026-08-11 14:49:49 UTC by Riccardo