

6.2 Example of using Process Helper for internal user data requests – quick-button version

As anticipated in the introductory chapter, one of the most common uses of the process helper concerns the creation of customized forms that can be presented to internal users of the CRM in order to request and save information.

The blocks and fields that make up these forms are called "dynamic forms".

PREMISE: In order for a user to be able to view and fill out a dynamic form, he/she must have enabled the appropriate permissions on the profile side (Figure 1)

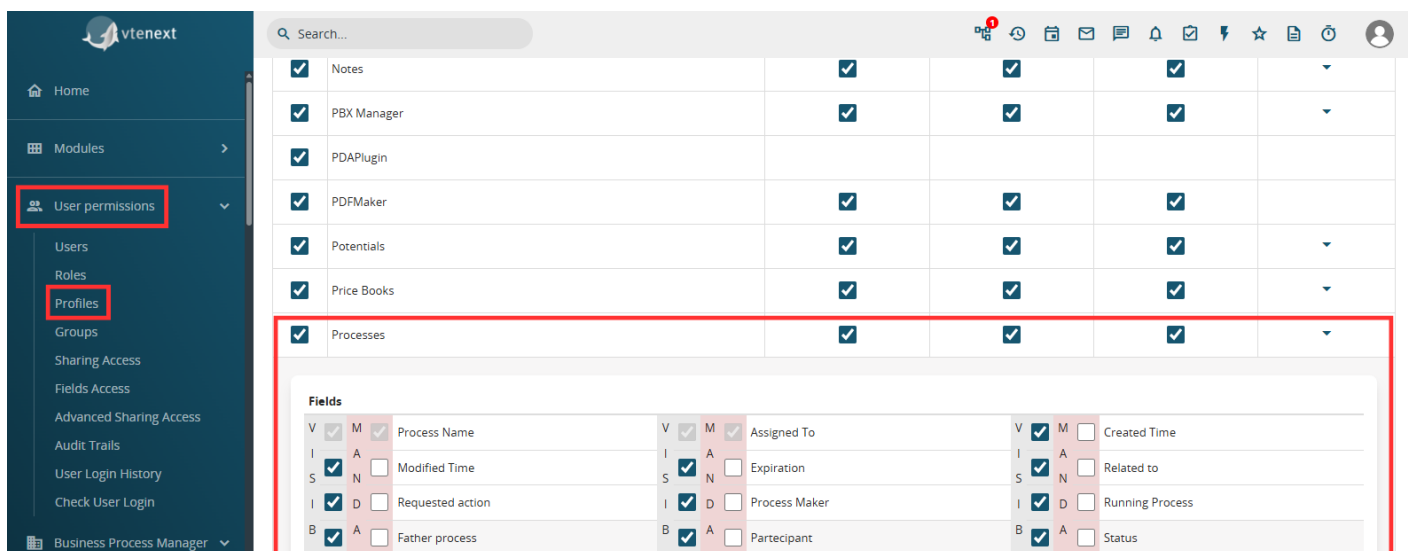


Figure 1

In order to configure a process helper, you must first configure an Action Task (create a link with a dedicated section) following the dedicated procedure (Figure 1).

NOTE: it is advisable to use the User Task symbol, as we are indicating an activity that will be charged to the user.

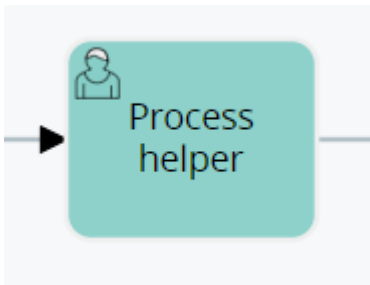


Figure 2

After the User Task, in this specific case it is essential to create a Task within which to perform some checks to allow the process to stop and present the dynamic form (Figure 2).

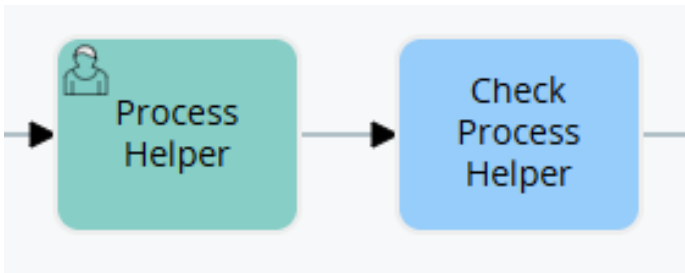


Figure 3

Once inside the User Task (in our example “Process Helper”) in configuration mode, we will find the section called “Process Helper” with all the related fields (Figure 3)

The screenshot shows the configuration interface for a BPMN task named 'Process Helper'. The interface is titled 'BPMN-UserTask: Process Helper' and includes a 'Task_1jpioqq' identifier. At the top right, there are buttons for 'Save', 'Cancel', and 'Advanced...'. Below these, there is a 'New action' button. The main section is titled 'Actions' and contains the text 'No actions configured'. Below this, there is a section titled 'Process Helper' with a checkbox that is checked. This section contains several fields: 'Assigned To' (set to 'User'), 'Status' (set to 'Running'), 'Requested action' (set to 'Select Option...'), 'Related to' (set to '\$30-crmid'), 'Process Name' (set to 'Select Option...'), 'Show in the related entity' (checked), '2-Factor Authentication' (unchecked), and 'Show documents of the related entity' (unchecked). At the bottom, there is a 'Manage dynamic form' section with buttons for 'Add Block', 'Import from dynaform...', and 'Import from module...'.

Figure 4

Once the main fields have been configured (Assigned to, Linked to, Action requested) we will create the necessary blocks and fields in the dynamic form in order to save the information that will be entered by the user (for more information on their configuration, see the chapter ...).

To better understand how it works, below is an example of a process helper aimed at requesting approval of an internal flow by filling in a single field called "Action" (Figure 4).

The screenshot shows a web application window titled "BPMN-UserTask: Process Helper". At the top right, there are buttons for "Save", "Cancel", and "Advanced...". Below the title bar, there is a section labeled "Actions" with the text "No actions configured". The main section is titled "Process Helper" and contains several fields: "Assigned To" (set to "User"), "Related to" (set to "\$30-crmid"), "Status" (set to "Running"), and "Requested action" (a dropdown menu). There are also checkboxes for "Show in the related entity" and "Show documents of the related entity". At the bottom, there is a "Manage dynamic form" section with buttons for "Add Block", "Import from dynaform...", and "Import from module...". Below this is an "Informations" section with a red asterisk next to the "Action" label.

Figure 5

This is a picklist type field with the following 3 static values: "empty", "APPROVATE" and "DO NOT APPROVE" and with mandatory permissions as Default (Figure 5)

The screenshot shows a "Field properties" dialog box. It has a title bar with a red "X" button. The main content area is titled "Field properties" and contains the following fields: "Label:" (set to "Action"), "Permissions" (set to "Read/Write"), "Mandatory Field" (checked), and "Values mode" (set to "Specify the values"). Below these fields is a "Pick list Values:" section with a text area containing the values "Approve" and "Not approve". At the bottom, there is a "Default Value" section with a dropdown menu set to "Select Option...". At the bottom right, there are "Save" and "Cancel" buttons.

Figure 6

In the associated Control Task (called “Process Helper Control”) a condition is indicated that allows the process not to continue with its flow until a value other than blank has been entered (which instead represents the default value of the picklist) (Figure 6)

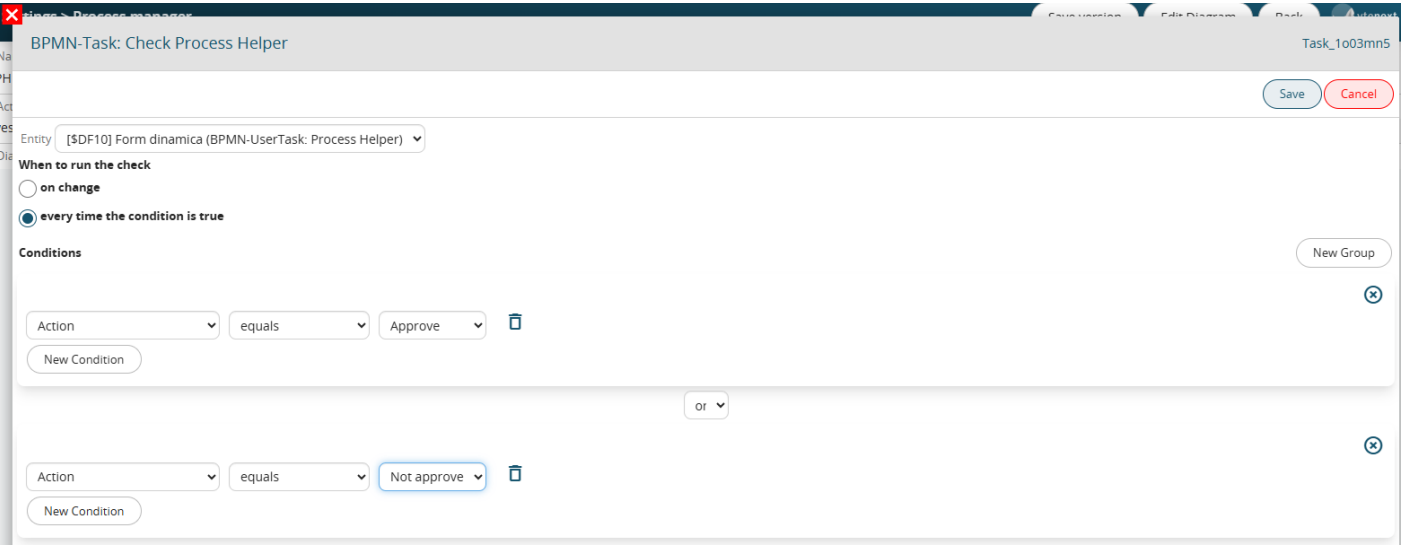


Figure 7

The two conditions inserted in separate groups allow the flow to be routed in two different paths based on the item selected by the user.

On the operational side, the process helper presents itself with a preview mask as shown in Figure 7, this is because the “Show in the linked entity” flag has been activated.

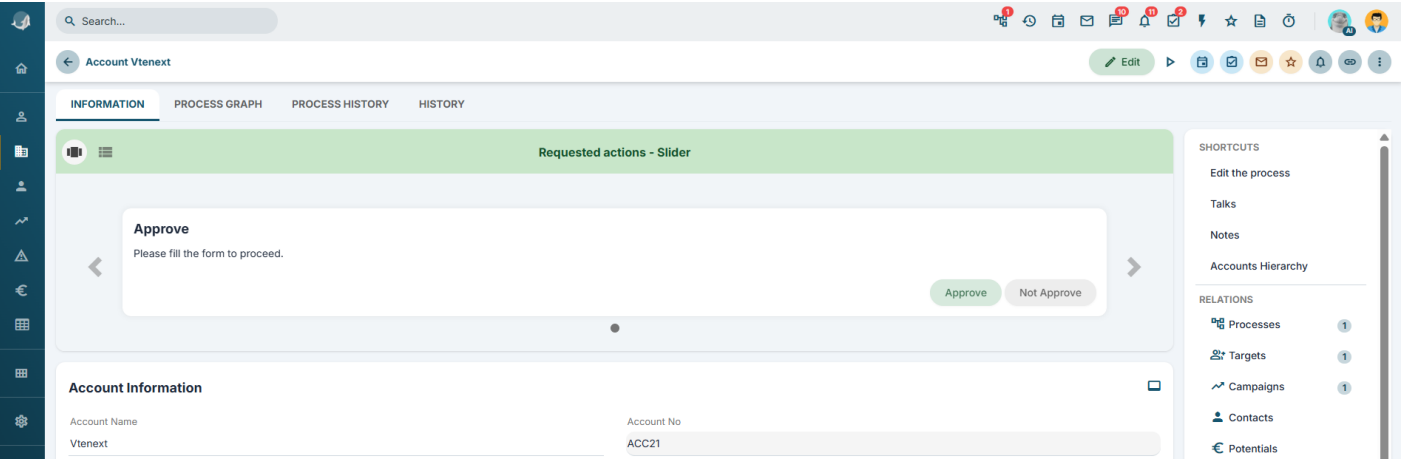


Figure 8

Alternatively, it will always remain visible and fillable in the section accessible via the dedicated button in the top-right menu (Figures 9 and 10).

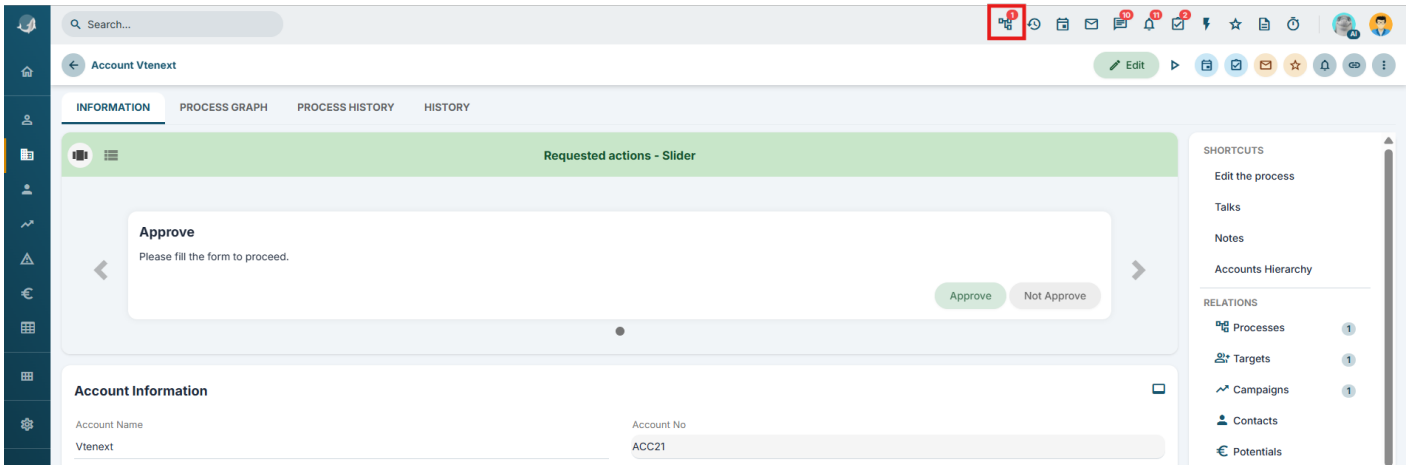


Figure 9

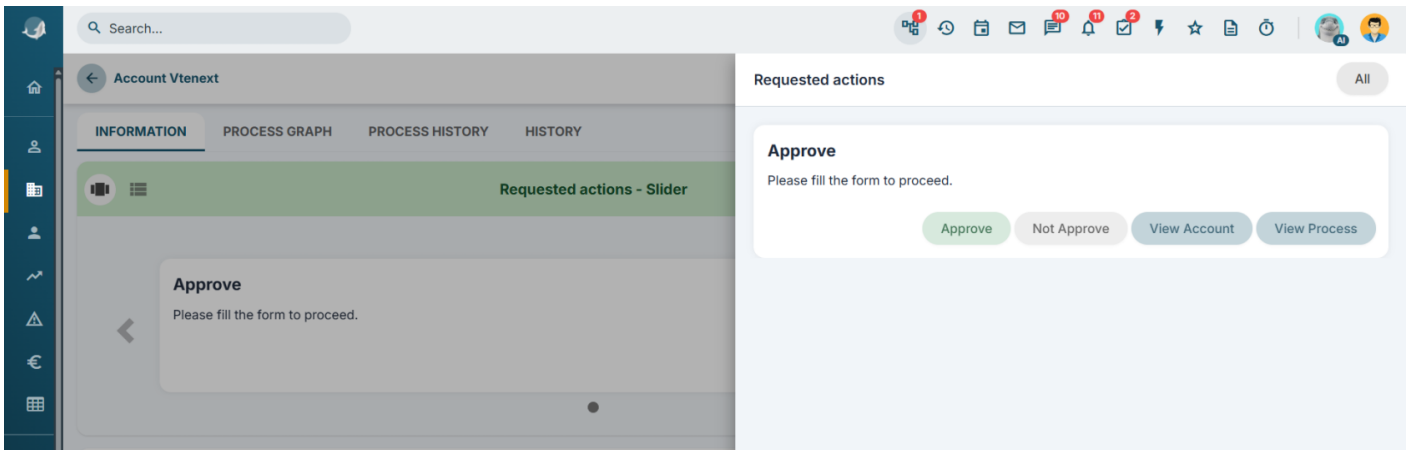


Figure 10

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