

6.4 Example of using Process Helper to request Business Portal user data

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 Business Portal users in order to request and save information.

For details on the conditions and requirements to be able to activate the management of processes on the Customer Portal side, we recommend consulting chapter 18.3 of the general Vtenext manual.

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

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.

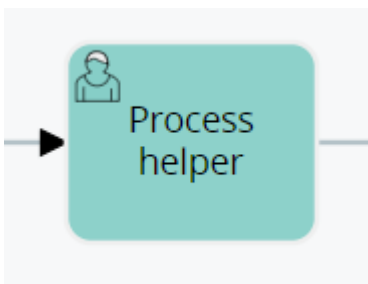


Figure 1

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

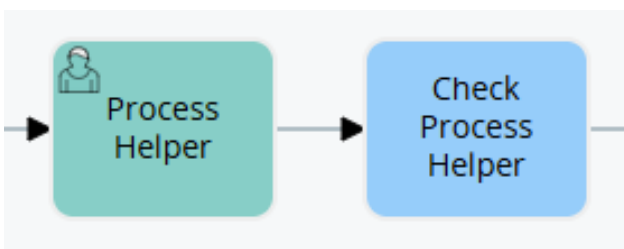


Figure 2

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 (see Figure 3)

BPMN-UserTask: Process Helper

Task_1jpioq

Save Cancel Advanced...

New action

Actions

No actions configured

☒ **Process Helper**

Assigned To [?] User admin@vtenext.com (User) Related to Select Option... \$30-crmid

Status Pick list Values Running

Requested action Select Option...

☒ 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 3

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.

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

Assigned To [?] Email \$30-email1 Related to Select Option... \$30-crmid

Status Pick list Values Running

Requested action Select Option... Fill the form to proceed with the flow.

☒ Show in the related entity ☐ Show documents of the related entity

Email Subject Select Option... Process Helper Mail From Select Option...

Email Message Select Option...

Font Size Bold Italic Underline Strikethrough Text color Background color Link Unlink Bulleted list Numbered list Indent Outdent Table Table of contents Print Close Help

Your action is required to proceed.

The link will be valid until Now 30 days Calendar days

Request confirmation by email ☐

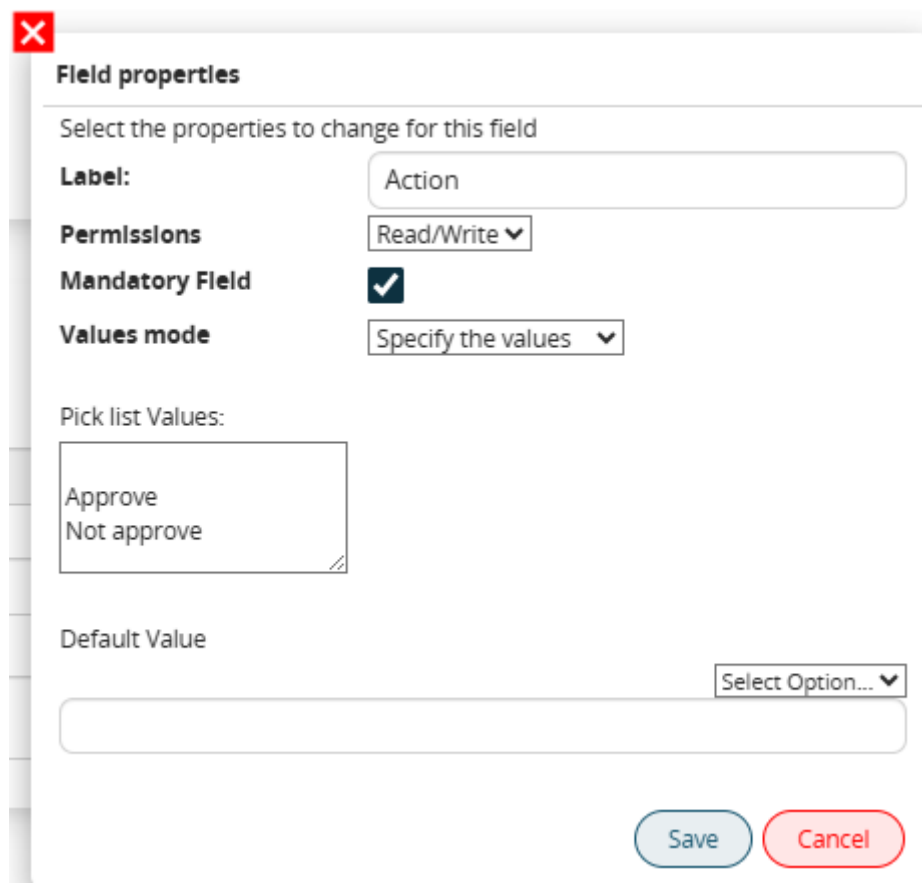
Add Block Import from dynaform... Import from module...

Informations

Action

Figure 4

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)

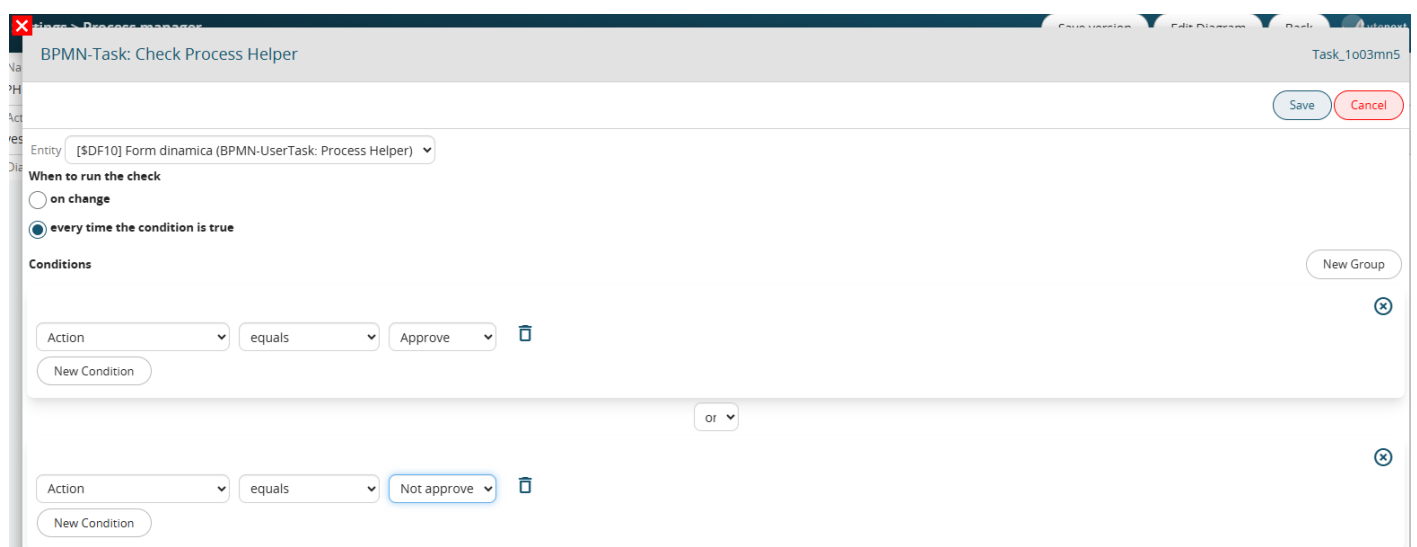


The screenshot shows a 'Field properties' dialog box with a red close button in the top left. The dialog is titled 'Field properties' and contains the following sections:

- Select the properties to change for this field**
- Label:** A text input field containing 'Action'.
- Permissions:** A dropdown menu showing 'Read/Write'.
- Mandatory Field:** A checkbox that is checked.
- Values mode:** A dropdown menu showing 'Specify the values'.
- Pick list Values:** A text area containing 'Approve' and 'Not approve'.
- Default Value:** A text input field with a dropdown menu showing 'Select Option...'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

Figure 5

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)



The screenshot shows a 'BPMN-Task: Check Process Helper' dialog box. The title bar includes 'BPMN-Task: Check Process Helper' and 'Task_1003mn5'. The dialog contains the following sections:

- Entity:** A dropdown menu showing '[SDF10] Form dinamica (BPMN-UserTask: Process Helper)'.
- When to run the check:** Two radio buttons: 'on change' (unselected) and 'every time the condition is true' (selected).
- Conditions:** A list of conditions with a 'New Group' button and a 'New Condition' button.
- Condition 1:** 'Action' equals 'Approve'.
- Condition 2:** 'Action' equals 'Not approve'.
- Buttons:** 'Save' and 'Cancel' buttons at the top right.

Figure 6

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, an email is sent to the address entered in the “Email” field of the Contact or Company entered in the “Assigned to” field of the Process helper that has a button called “CLICK HERE” (Figure 7)

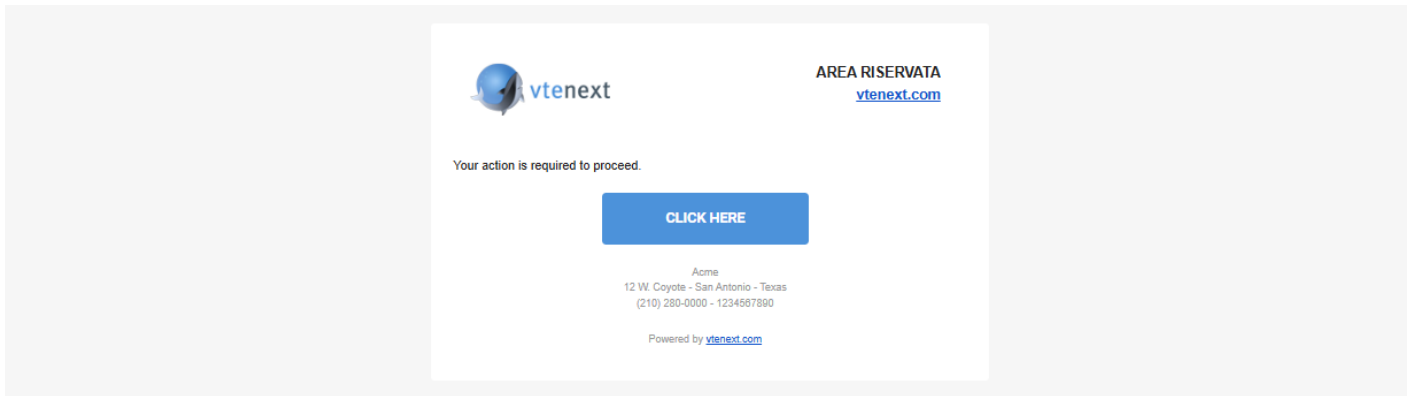


Figure 7

Clicking the button opens the Business Portal and displays the process completion interface in the "Required Actions" section (Figure 8).

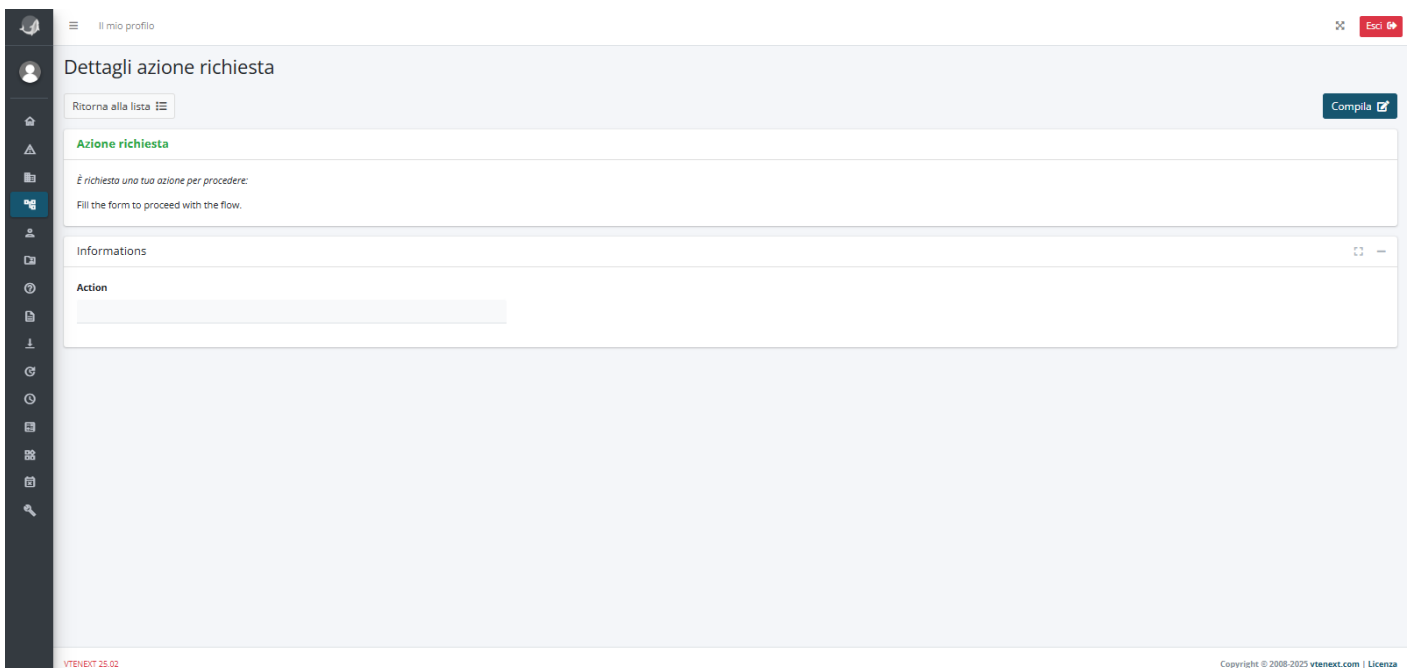


Figure 8

The user will simply have to click on the “Fill” button (Figure 9), fill in the “Action” field and finally click on the “Save” button (Figure 10)

Dettagli azione richiesta

Ritorna alla lista

Compila

Azione richiesta

È richiesta una tua azione per procedere:

Fill the form to proceed with the flow.

Informations

Action

Figure 9

Modifica azione richiesta

Informazioni

Modifica azione richiesta

Annulla

Salva

Informations

Action

Approve

Not approve

Figure 10

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