

6.6 Example of Process Helper usage for internal process use

As anticipated in the introductory chapter, one of the uses of the process helper concerns the creation of virtual spaces in which to store data or carry out operations necessary exclusively within the process (and which therefore would be useless to historicize in the CRM modules).

To proceed with the configuration of the process helper, you must first configure an Action Task (create link with dedicated section) following the dedicated procedure (Figure 1).

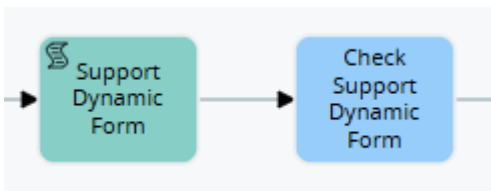


Figure 1

NOTE: It is NOT mandatory to create a subsequent Task, since the checks that would be performed within it would not be aimed at stopping the process to present the dynamic form but rather to perform a simple check on the data present in the fields of the dynamic form (which we remind you were not entered directly by any user).

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

The screenshot displays the configuration window for a BPMN-ScriptTask named 'Support Dynamic Form'. The window has a title bar with a close button and a tab labeled 'Task_1dr1gyj'. In the top right corner, there are buttons for 'Save', 'Cancel', and 'Advanced...'. Below these is a 'New action' button. The main area is divided into sections. The 'Actions' section shows 'No actions configured'. The 'Process Helper' section is expanded and contains the following fields:

- Assigned To:** A dropdown menu with 'User' selected.
- Related to:** A dropdown menu with '\$32-crmid' selected.
- Status:** A dropdown menu with 'Running' selected.
- Pick list Values:** A dropdown menu with 'Running' selected.
- Requested action:** A dropdown menu with 'Select Option...' selected.
- Process Name:** A checkbox that is unchecked.
- Show in the related entity:** A checkbox that is unchecked.
- Show documents of the related entity:** A checkbox that is unchecked.
- 2-Factor Authentication:** A checkbox that is unchecked.

At the bottom of the window, there is a 'Manage dynamic form' section with buttons for 'Add Block', 'Import from dynaform...', and '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 based on the data we want to use or the calculations we want to perform.

To better understand how it works, below is an example of a process helper designed to calculate the difference in days between two dates and store the result in a field called "Calculation result", this to verify whether the two values taken into consideration are equal or different (and consequently perform different actions) (Figure 4).

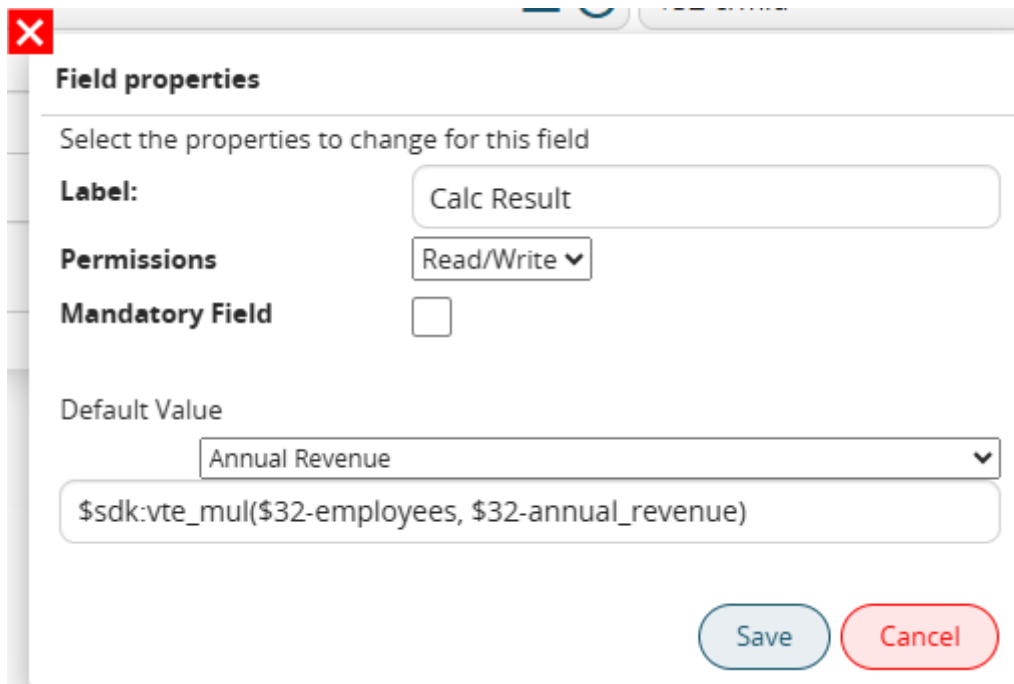
The screenshot shows the configuration interface for a BPMN-ScriptTask titled "Support Dynamic Form". The interface is divided into several sections:

- Actions:** A section with the text "No actions configured" and a "New action" button.
- Process Helper:** A section with a checked checkbox. It contains several fields and options:
 - Assigned To:** A dropdown menu set to "User" with a value of "admin@vtenext.com (User)".
 - Status:** A dropdown menu set to "Running".
 - Requested action:** A dropdown menu set to "Select Option...".
 - Related to:** A dropdown menu set to "\$32:crmId".
 - Process Name:** A dropdown menu set to "Select Option...".
 - Options:** Two checkboxes, "Show in the related entry" and "2-Factor Authentication", both of which are unchecked.
 - Show documents of the related entity:** An unchecked checkbox.
- Manage dynamic form:** A section with buttons for "Add Block", "Import from dynaform...", and "Import from module...".
- Informations:** A section with a field labeled "Calc Result" and a small icon.

Figure 4

This is a "Number" type field in which the SDK "Diff Date" function is inserted as a Default value, which allows you to perform the difference between two dates.

NOTE: By default, the system returns the result in seconds, but if you want to obtain the result in days, you must pass the word "days" as the third parameter, as done in this example (Figure 5)



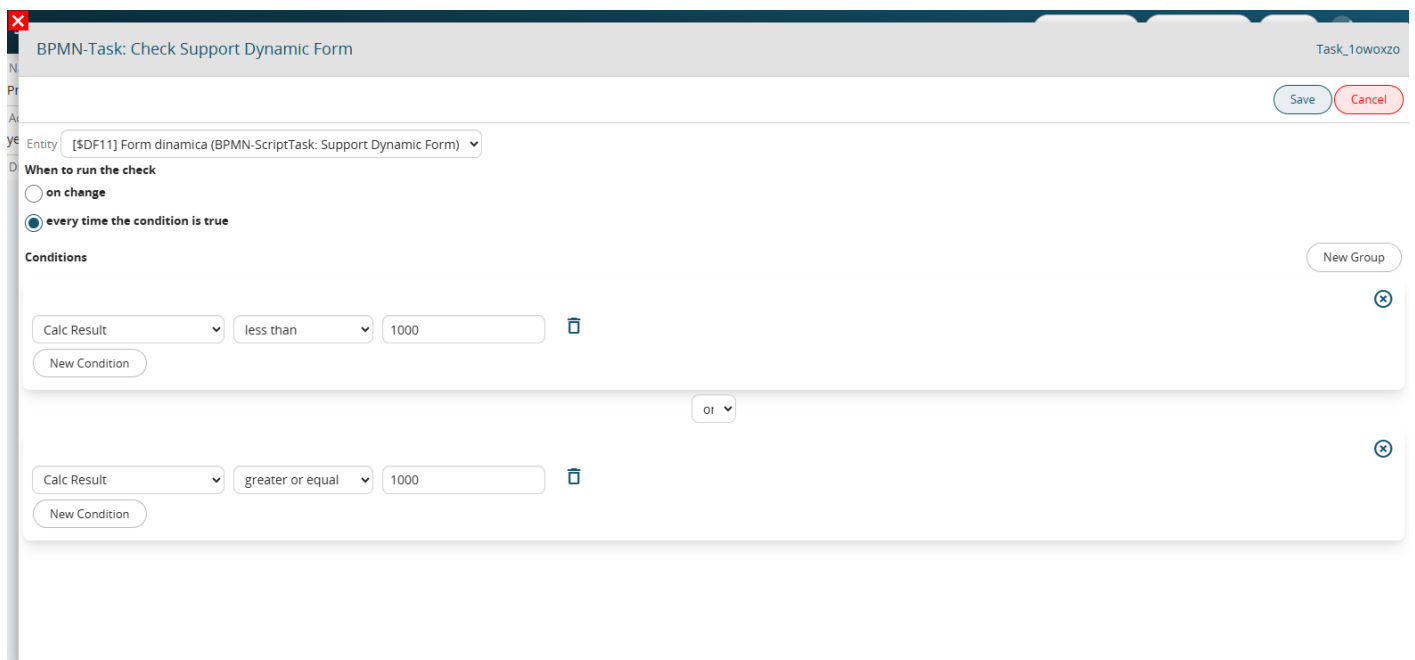
A dialog box titled "Field properties" with a red close button in the top-left corner. It contains the following fields:

- Select the properties to change for this field**
- Label:** A text input field containing "Calc Result".
- Permissions:** A dropdown menu showing "Read/Write" with a downward arrow.
- Mandatory Field:** An unchecked checkbox.
- Default Value:** A dropdown menu showing "Annual Revenue" with a downward arrow.
- A text input field containing the formula: `$sdk:vte_mul($32-employees, $32-annual_revenue)`.
- At the bottom right, there are two buttons: "Save" (blue) and "Cancel" (red).

Figure 5

In the associated Control Task (called “Dynamic Support Form Control”) two different groups of conditions are indicated that allow the process to take different paths based on the calculation result (Figure 6).

Specifically, it is checked whether the content of the “Calculation Result” field is equal to or different from 0, this is because if the two compared values are equal the calculated difference will be equal to 0, otherwise it will be different from 0.



A screenshot of a BPMN task configuration window titled "BPMN-Task: Check Support Dynamic Form". It includes a "Task_1owoxzo" tab and "Save" and "Cancel" buttons in the top-right corner.

The configuration is for the entity "[DF11] Form dinamica (BPMN-ScriptTask: Support Dynamic Form)".

When to run the check:

- ☐ on change
- ☒ every time the condition is true

Conditions:

The conditions are defined in two groups, separated by an "or" operator:

- Group 1:** "Calc Result" is less than 1000.
- Group 2:** "Calc Result" is greater or equal 1000.

Each condition group has a "New Condition" button and a trash icon. There are also "New Group" and "or" dropdown buttons to manage the logic.

Figure 6

Revision #3

Created 2025-05-23 14:03:27 UTC by Riccardo

Updated 2026-07-14 12:33:23 UTC by Tommaso