

7.1 Configuring a Basic Process - Quote Approval

FLOW DESCRIPTION

When creating a quote with Quote Stage = “Created”, the process will be triggered and will present the members of the “Management” group with a process helper in popup mode, requesting their completion.

In case of confirmation, an internal notification will be sent to the assignee of the quote (which corresponds to the sales representative who is managing the quote).

Instead, in case of rejection, a notification email will be sent to the assignee of the quote (which corresponds to the sales representative who is managing the quote) containing any internal notes/comments useful for reviewing the quote.

If the popup is not completed by any user within two days, the system will send a reminder email to the members of the group.

In the event of an SMTP error in sending the non-approval email, the system will notify the members of the “IT Department” group by sending an internal notification.

ELEMENTS REQUIRED IN THE PROCESS

To do this process we will need the elements listed below:

- Condition Task
- Action Task
- Timer Boundary Event
- Gateway
- End Event

If their operation is not clear we recommend first consulting chapter 2 of the process manual.

FLOW CHART CONFIGURATION

We use the elements mentioned above to set up a diagram like the one shown in Figure 1

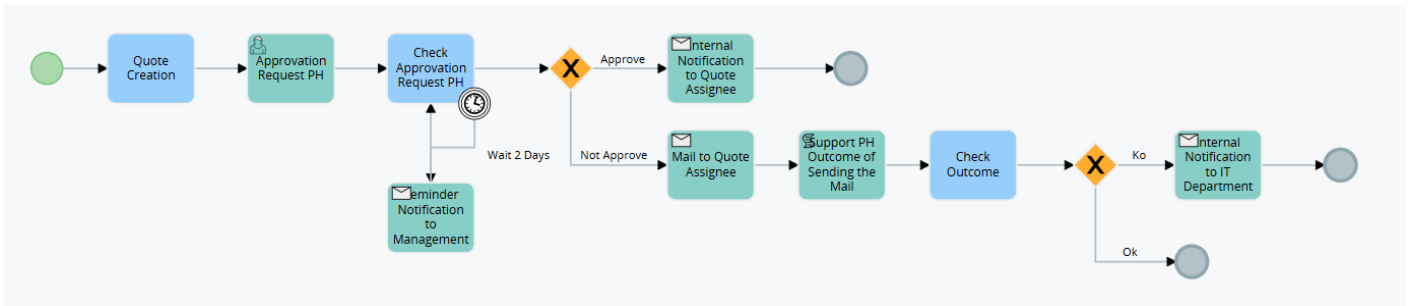


Figure 1

CONFIGURATION OF INDIVIDUAL ELEMENTS OF THE FLOW

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

Let's start with the Condition Task "Create estimate".

In the "When to run the check" section, select the "At creation" option to start the process only when the estimate is created with Estimate Stage = "Created" (Figure 2).

Figure 2

In the UserTask “PH approval request” we configure a process helper in order to request the user for the information necessary for the approval of the estimate.

“Process Helper” block configuration:

- in the “Assigned to” field we statically insert the “Direction” group
- in the “Linked to” field we insert the estimate ID
- in the “Process Name” field we indicate the name that will be assigned to the process in this specific step, then we insert the static part “PH approval request” followed by the value of the “Estimate Number” variable

- in the “Requested Action” field we insert a brief description of the activity to be performed
 - we check the “Show in the linked entity” checkbox to activate the process helper popup mode
- The result will be the one shown in Figure 3.

☒ **Process Helper**

Assigned To

Group

Management

Related to

\$33-crmid

Select Option...

Status

Pick list Values

Running

▼

☒ Process Name

Select Option...

Requested action

Select Option...

Click on Edit to proceed to the quote approval step.

☒ Show in the related entity

☐ 2-Factor Authentication

☐ Show documents of the related entity

Figure 3

Dynamic form configuration:

In the dynamic form we create a single Block called “Quote Information” (see Figure 4) with the following fields:

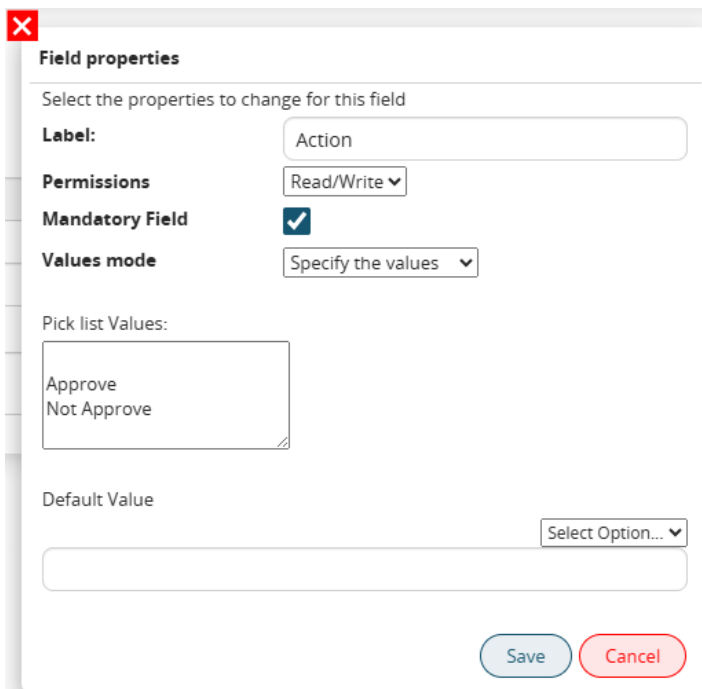
- 1 “Action” (picklist field) with the following values: “empty”, “APPROVATE” and “DO NOT APPROVE” (see Figure 5)
- 2 “Internal Notes” (text area field)

Quote Informations

Action *

Internal Notes

Figure 4



Field properties

Select the properties to change for this field

Label:

Permissions:

Mandatory Field: ☒

Values mode:

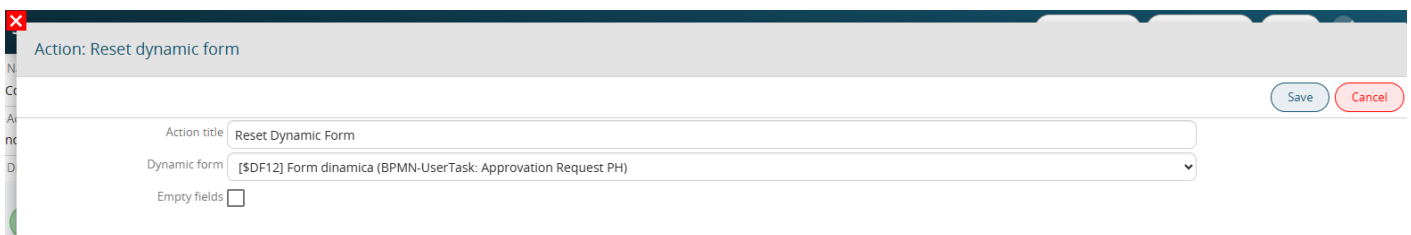
Pick list Values:

Default Value

Figure 5

Dynamic Form Reset Action Configuration

Let's create a "Dynamic Form Reset" action to reset the values of the fields in the form in the event that the process helper is forced to re-compile (see Figure 6).



Action: Reset dynamic form

Action title:

Dynamic form:

Empty fields: ☐

Figure 6

In the Condition Task “PH Control approval request” we are going to perform a check on the “Action” field of the process helper form to direct the process in the branch related to the value entered by the user (see Figure 7)

Close

BPMN-Task: Check Approval Request PH

Task_12aarp4

Save Cancel

Entity: [5DF12] Form dinamica (BPMN-UserTask: Approval Request PH)

When to run the check

☐ on change

☒ every time the condition is true

Conditions

New Group

Action equals Approve

New Condition

or

Action equals Not Approve

New Condition

Figure 7

In the lower right edge of the task we place a Timer Boundary Event (Figure 8) and proceed with its configuration by inserting a 2-day time interval (Figure 9)

For further information, consult chapter 2.3 of the process manual.

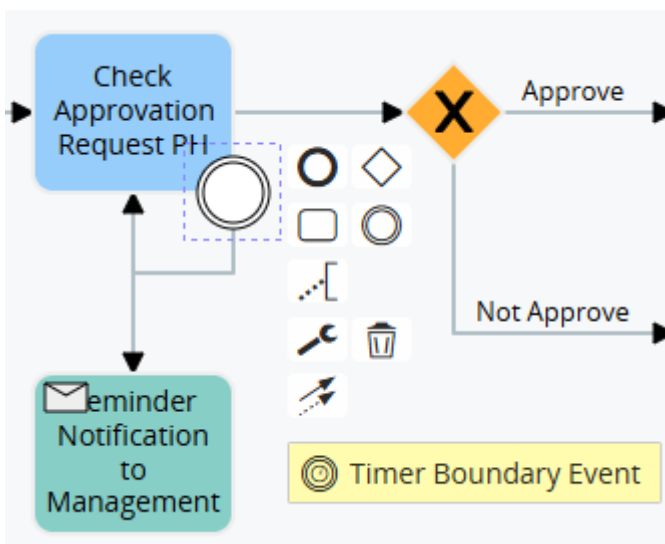


Figure 8

BPMN-BoundaryEvent(TimerEventDefinition: Interrupting)

IntermediateThrowEvent_1fzI4tk

Save Cancel

If the process is still in this state for more than 0 Months 2 Days 0 Hours 0 Minutes

After Now go on SendTask: Reminder Notification to Management

Figure 9

We are going to connect the SendTask “Send reminder notification to Management” to the Timer Boundary Event in order to send an internal notification to the members of the “Management” group in the event that the process remains stuck on the Condition Task “PH control approval

request” for more than 2 days (Figure 10)

For further information, see section 3.4 of the process manual.

Figure 10 shows the configuration for the 'Action: Send notification' task. The 'Action title' is 'Reminder Notification to Management'. The 'Notification Information' section includes a 'Description' field with the text 'Please fill the popup assigned to you to proceed with the process flow.' and a 'Select Option...' dropdown. The 'Creator' is set to 'admin@vtenext.com (User)' and the 'Assigned To' is 'Management'. The 'Related To' is set to 'Other' with the value '\$33-crmid'.

Figure 10

In the next gateway we associate each group of conditions (inserted in the Condition Task “PH Control approval request”) with the corresponding branch to follow (see Figure 11)

Figure 11 shows the configuration for the 'BPMN-ExclusiveGateway' task. The 'Check Approval Request PH' section has two branches. The first branch is 'Action equals Approve' with the action 'SendTask: Internal Notification to Quote Assignee (Approve)'. The second branch is 'Action equals Not Approve' with the action 'SendTask: Mail to Quote Assignee (Not Approve)'.

Figure 11

Configuration of the elements following the “APPROVE” branch

In the SendTask “Send internal notification to quote assignee” we configure the sending of an internal notification to the quote assignee (which corresponds to the sales representative who is managing the quote) to notify him of the approval of the quote (Figure 12).

For further information, see section 3.4 of the process manual.

Figure 12

The endEvent must also be configured, because we have involved a process helper in the process, so it is necessary to activate a process helper inside it to set the process status to “Terminated” (see Figure 13)

Figure 13

Configuration of the elements following the “DO NOT APPROVE” branch

In the SendTask “Send email to quote assignee” we configure the sending of an email to the quote assignee (which corresponds to the sales representative who is managing the quote) to notify him of the non-approval of the quote (Figure 14).

For further information, see section 3.5 of the process manual.

Field properties

Select the properties to change for this field

Label: Positive Outcome?

Permissions: Read/Write ▼

Mandatory Field: ☐

Default Value: Select Option... ▼

- \$EMAIL34 Select Option...
- SDK Functions
- Date functions
- [S33] Quotes (BPMN-Task: Quote Creation)
- [SDF12] Form dinamica (BPMN-UserTask: Approvation Request PH)
- Participants
- [SEMAIL34] Email (BPMN-ScriptTask: Mail to Quote Assignee)**

Figure 16

Field properties

Select the properties to change for this field

Label: Positive Outcome?

Permissions: Read/Write ▼

Mandatory Field: ☐

Default Value: Select field... ▼

- \$EMAIL34 Select field...
- Back to options
- [SEMAIL34] Email (BPMN-ScriptTask: Mail to Quote Assignee)
- Positive result?**
- Error Message

Figure 17

In the Condition Task “Check email sending result” we are going to perform a check on the “Positive outcome?” field of the process helper form to direct the process in the branch related to the email sending result (see Figure 18)

BPMN-Task: Check Outcome Task_0h4md9p

Entity: [SDF13] Form dinamica (BPMN-ScriptTask: Support PH Outcome of Sending the Mail)

When to run the check

☐ on change

☒ every time the condition is true

Conditions

New Group

Positive Outcome? equals 0 New Condition

or

Positive Outcome? equals 1 New Condition

Save Cancel

Figure 18

In the next gateway we associate each group of conditions (inserted in the Condition Task “Check email sending result”) with the corresponding branch to follow (see Figure 19)

BPMN-ExclusiveGateway ExclusiveGateway_0uy6i66

Check Outcome

Positive Outcome? equals 0

SendTask: Internal Notification to IT Department (Ko)

Positive Outcome? equals 1

EndEvent (Ok)

Save Cancel

Figure 19

Configuration of the elements following the “Ok” branch

The endEvent must also be configured, because we have involved a process helper in the process, so it is necessary to activate a process helper inside it to set the process status to “Terminated” (see Figure 20)

BPMN-EndEvent EndEvent_12bjixb

Save Cancel Advanced...

New action

Actions

No actions configured

☒ Process Helper

Assigned To: User admin@vtenext.com (User)

Status: Ended

Requested action: Select Option...

Related to: \$33-crmid

☐ Process Name

☐ Show in the related entity

☐ 2-Factor Authentication

☐ Show documents of the related entity

Save Cancel Advanced...

Figure 20

Configuration of the elements following the “Ko” branch

In the SendTask “Send internal notification to IT department” we configure the sending of an internal notification to the “IT Department” group to report the anomaly found in sending the email (Figure 21)

For further information, see section 3.4 of the process manual.

The screenshot shows the 'Action: Send notification' configuration window. At the top, the title bar says 'Action: Send notification'. Below it, there's a 'Save' button and a 'Cancel' button. The 'Action title' field is set to 'Internal Notification to IT Department'. Under the 'Notification Information' section, the 'Description' field contains the text: 'An SMTP error verified,below the details:
Positive Outcome? -> \$DF13-vcf_2
Error Message -> \$DF13-vcf_3'. Below this, the 'Creator' is set to 'admin@vtenext.com (User)' and the 'Assigned To' is set to 'IT Department'. The 'Related To' field is set to '\$33-crmid'. Under the 'Mail information - la mail viene inviata agli utenti che hanno scelto di essere notificati via Email' section, the 'Subject' is 'Process Notification', the 'Sender name' is 'VTENEXT Notification System', and the 'Sender mail' is 'riccardo.panarotto@vtenext.com'.

Figure 21

The endEvent must also be configured, because we have involved a process helper in the process, so it is necessary to activate a process helper inside it to set the process status to “Terminated” (see Figure 22)

The screenshot shows the 'BPMN-EndEvent' configuration window. At the top, the title bar says 'BPMN-EndEvent'. Below it, there's a 'Save' button, a 'Cancel' button, and an 'Advanced...' button. The 'EndEvent_12bjxb' label is visible in the top right. Under the 'Actions' section, it says 'No actions configured'. Below this, the 'Process Helper' section is checked. The 'Assigned To' is set to 'User' and 'admin@vtenext.com (User)'. The 'Status' is set to 'Ended'. The 'Requested action' is set to 'Pick list Values'. The 'Related to' field is set to '\$33-crmid'. There are checkboxes for 'Process Name', 'Show in the related entity', and '2-Factor Authentication', all of which are currently unchecked.

Figure 22

Revision #4

Created 2025-05-23 14:06:01 UTC by Riccardo

Updated 2026-03-25 11:12:40 UTC by Tommaso