

# BPMN Actions

Below the main BPMN actions:

- 1 - Create entity**
- 2 - Update entity**
- 3 - Delete entity**
- 4 - Send notification**
- 5 - Send email**
- 6 - Send newsletter**
- 7 - Create PDF**
- 8 - Reset dynamic form**
- 9 - Cycle rows**
- 10 - Reset conditional fields**
- 11 - Link entities**
- 12 - Link static entities**
- 13 - Transfer relations**
- 14 - Insert table row**
- 15 - Call external Web service**
- 16 - Cycle Related Record**

## **1 - Create entity:**

This action allows to create record of system entities (standard or custom).

You can set a static or dynamic value for each one field (you can select values from involved process entities).

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Create entity

SAVE CANCEL

Action title Create account entity

Module Account

Account Information

Account Name Company Account No AUTO GEN ON SAVE

Website http:// Select Option... Phone Select Option...

Fax Select Option... Member Of Accounts Search...

Phone (other) Select Option... Employees Select Option...

Email Email email (other) Select Option...

Ownership Select Option... Industry Select Option...

Rating Other Select Option... Type Other Select Option...

Lock Automatic Emails No Annual Revenue Select Option...

Back Details Select Option... VAT Registration Number Select Option...

## 2 - Update entity:

This action allows to update an involved process entity or related ones.

You can set static or dynamic value for each one field (you can select values from involved process entities).

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Update entity

SAVE CANCEL

Action title Update entity

Entity ID

Ticket Information

Title Title Related To Account Search...

\$1-(parent\_id : (Accounts) accountname) - \$1-ticket\_title

Assigned To Assigned To Product Name Products Search...

Other \$1-assigned\_user\_id

Priority Select Option... Status Pick list Values In Progress

Severity Select Option... Hours Select Option...

Time created Select Option... Category Select Option...

## 3 - Delete entity:

This action allow to delete a dynamic entity, an involved process entity.

This action is used in conversion processes cases, ex. conversion from lead to contact/account (deleting lead after the conversion) or in error cases, ex. re-planning of activities with creation of new entities and deleting the old ones.

The screenshot shows the 'Delete entity' action configuration in the Process manager. The action title is 'Delete entity'. The entity is set to '[S1] Leads (BPMN-Task: Start condition)'. There are 'SAVE' and 'CANCEL' buttons at the top right.

#### 4 - Send notification:

This action allow to send internal notification to the system users.

It's possible to set a specific text with static/dynamic data and relate entity. Besides, you can set the email parameters for the users that use email notification and not internal ones (you can change this settings into the user preference).

The screenshot shows the 'Send notification' action configuration in the Process manager. The action title is 'Closure ticket notification'. The notification information section includes a description: 'Dear \$1-(assigned\_user\_id : (Users) first\_name) \$1-(assigned\_user\_id : (Users) last\_name), the ticket \$1-ticket\_no is been closed successfully'. The 'Ticket No' field is set to '\$1-ticket\_no'. The 'Creator' is set to 'admin (Administrator)'. The 'Assigned To' is set to 'Other' with the value '\$1-assigned\_user\_id'. The 'Related To' is set to 'Other' with the value '\$1-crmid'. The 'Mail information' section includes a subject 'Process Notification', a sender name 'VTE Notification System', and a sender email 'admin@vte123abc987.com'.

#### 5 - Send email:

This action allows to send email with static/dynamic data.

It's possible to set a static/dynamic sender email address (you can select email fields from involved process entities).

The same configuration is available for the email recipients (ex. record assigned user email , involved process participants, ecc).

Besides, you can relate the email to an involved process entity (or related ones). In this case, it will be possible to see a new message into the related list.

In the body message you can insert static/dynamic values and other general functions like current date/time, desired entity link (internal one for users or external one for portal customers).

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Send email

SAVE CANCEL

Action title Send email

From administration@service.com Select Option...

To \${assigned\_user\_id : (Users) email1} Assigned To : (Users) email

Cc Select Option...

Bcc Select Option...

Subject Assignment ticket \$1-ticket\_no Ticket No

Message

Assigned To : (Users) Last Name Select Option...

Source Styles Format Font Size A A- A+ Bold Italic Underline Strikethrough Text Color Background Color Link Unlink Image Table List Indent Outdent

Dear \${assigned\_user\_id : (Users) first\_name} \${assigned\_user\_id : (Users) last\_name},  
the ticket \$1-ticket\_no is been assigned to you.

Click [here](#) for all details

Thanks,  
Administration

## 6 - Send newsletter:

This action allow to send newsletter, so a massive email to pre-selected recipients. These ones can be static addresses or chosen from involved process entities, system targets.

It's possible to set sender email address and name (alias), default template and a campaign (existing or new one)

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Send newsletter

SAVE CANCEL

Action title Send newsletter

Campaign Create new one every time

From Name Service administration Select Option...

From Address administration@service.com Select Option...

Target: BPMN news Campaign

Recipients Select static record: or select from process: -Please select-


Subject Try VTENEXT and discover the features of the BPM Engi Select Option...

Email Template Tell a friend about VTE

Message

Select Option...

Source Styles Format Font Size A A- A+ Bold Italic Underline Strikethrough Text Color Background Color Link Unlink Image Table List Indent Outdent

 vtenext

## 7 - Create PDF:

This action allow to create a PDF document using an existing template.

It's possible to select the PDF entity, desired template, the entity to relate document, language, assigned user and document folder.

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Create PDF

SAVE CANCEL

Action title Create template pdf

PDF document Entity ID

PDF Info

PDF subject Ticket No Related PDF to ID

Ticket \$1-ticket\_title - \$1-ticket\_no Other \$1-crmid

PDF template language Assigned To

Pick list Values en\_us User admin (Administrator)

PDF custom info

PDF template Document folder

Pick list Values Standard Layout Pick list Values Default

## 8 - Reset dynamic form:

This action is based on ProcessHelper use and allows to clean its data off to re-use this one. So, it's used when the same Dynamic Form can be shown to the user many times. You need to clean its data to allow a new compilation.

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Reset dynamic form

SAVE CANCEL

Action title Reset Dynamic Form

Dynamic form [\$DF1] Dynamic Form (BPMN-ScriptTask: Action)

## 9 - Cycle rows:

This action is based on Table field use. This one is not available if involved process entities (and related ones) haven't got this field into the module layout editor.

For each one table field row (and specific column conditions) is possible to send emails, create new entities, insert new rows (into the same field or other ones), delete rows, send notifications.

Process manager

SAVE VERSION EDIT DIAGRAM BACK

BPMN-ScriptTask: Action

Task\_1qn44al

SAVE CANCEL ADVANCED...

NEW ACTION

Create a new action Cycle on field Account Name (Accounts) : Contatti principali and for each row

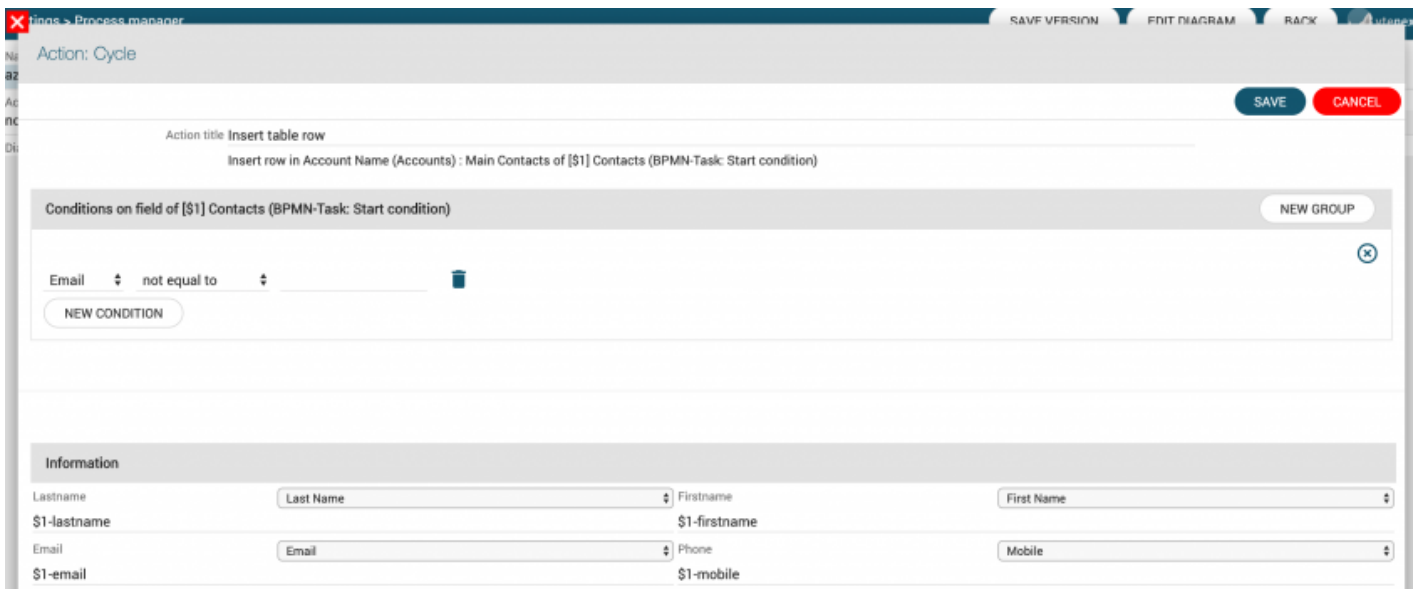
CREATE CANCEL

Actions

No actions configured

Process Helper

- Send email
- Create entity
- Insert table row
- Delete table row
- Send notification



Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Cycle

SAVE CANCEL

Action title Insert table row

Insert row in Account Name (Accounts) : Main Contacts of [\$1] Contacts (BPMN-Task: Start condition)

Conditions on field of [\$1] Contacts (BPMN-Task: Start condition) NEW GROUP

Email not equal to

NEW CONDITION

Information

Lastname	Last Name	Firstname	First Name
\$1-lastname		\$1-firstname	
Email	Email	Phone	Mobile
\$1-email		\$1-mobile	

## 10 - Reset conditional fields:

This action is based on process conditional fields use.

In fact, it's possible to set conditional fields on the selected entity (involved into the process) or into the Dynamic form.

In the entity conditional fields case, these ones prevail over the general settings ones.

The last ones are disabled till the process end or an action task with "Reset conditional fields" action.



Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Reset conditional fields

SAVE CANCEL

Action title Reset account conditional fields

Entity [\$1] Accounts (BPMN-Task: Start condition)

## 11 - Link entities:

This action allows to link 2 entities each other those have a N - N relation.

The 2 entities haven't got the relation field but a N relation.



Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Link entities

SAVE CANCEL

Action title Link note

Link [\$1] Accounts (BPMN-Task: Start condition)

to [\$2] Notes (BPMN-ScriptTask: Action)

## 12 - Link static entities:

This action allows to link a specific static entity to an involved process one.

It's useful when you have to link the same entity to many ones into the process, ex. link the same

document (privacy policy, checklists, ecc.)

The screenshot shows a window titled 'Link static entities' with a header bar containing 'Process manager', 'SAVE VERSION', 'EDIT DIAGRAM', 'BACK', and 'ADVANCE'. The main area is titled 'Action: Link static entities'. It features a 'Link' field with the value '[S1] Accounts (BPMN-Task: Start condition)' and a 'to' field with the value 'Documents'. Below these fields is a 'SELECT DOCUMENTS' button. A table below the button lists documents with columns: Action, Title, File Name, Assigned To, and Folder Name. The table contains one row with a blue 'X' icon in the Action column, 'Privacy policy' in the Title column, '1\_yrgbW7GvOcp94f-5HZcmyQ.jpeg' in the File Name column, 'admin (Administrator)' in the Assigned To column, and 'Default' in the Folder Name column. At the top right of the window are 'SAVE' and 'CANCEL' buttons.

Action	Title	File Name	Assigned To	Folder Name
X	Privacy policy	1_yrgbW7GvOcp94f-5HZcmyQ.jpeg	admin (Administrator)	Default

### 13 - Transfer relations:

This action allows to transfer/copy the related entities from a process entity to an other one.

In the 1 - N relation case, the record will be transferred, while with N - N relation the record will be copied.

This action is useful in process conversion cases where the start entity is converted to an other one, so all its related entities can be transferred/copied to the new one.

Ex. In a conversion process from lead to contact/account all lead related entities can be transferred/copied to the new contact/account. At the end it's possible to delete the lead without any lost.

The screenshot shows a window titled 'Transfer relations' with a header bar containing 'Process manager', 'SAVE VERSION', 'EDIT DIAGRAM', 'BACK', and 'ADVANCE'. The main area is titled 'Action: Transfer relations'. It features an 'Action title' field with the value 'Transfer from lead to contact'. Below this is a 'Transfer relations' section with two 'ID' fields, one for 'from' and one for 'to'. Below the 'to' field is a list of entities with checkboxes: Trouble Tickets (checked), Events (checked), Tasks (checked), Visit Report (unchecked), Products (unchecked), Documents (checked), Services (unchecked), Targets (unchecked), Campaigns (unchecked), and Newsletter (unchecked). At the top right of the window are 'SAVE' and 'CANCEL' buttons.

### 14 - Insert table row:

This action is based on Table field use. This one is not available if involved process entities (and related ones) haven't got this field into the module layout editor.

This action allows to insert a new row into the specific table field.

The insert values can be statics/dynamics (you can select values from involved process entities).

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Insert table row

Action title **Insert contact**

Insert row in Account Name (Accounts) : Main contacts of [S1] Contacts (BPMN-Task: Start condition)

Information

Lastname	Last Name	Firstname	First Name
\$1-lastname		\$1-firstname	
Email	Email	Phone	Mobile
\$1-email		\$1-mobile	

SAVE CANCEL

## 15 - Call external Web service:

This action allows to call a REST external Web service.

It's possible to set call data into the Settings -> Business Process Manager -> External Web services.

You have to fill the endpoint, authentication parameters and returned fields. When it's done it's possible to use them into a process.

In the process configuration you can set dynamic parameters (name and value), so the web service call will have got all static data (specified into general settings) and dynamic ones (specified into the process).

Into the flow it's possible to check if the web service call has been successfully with the 3 static parameters it returns (success, response code and message code). In addition, the call will get the configured returned fields.

In the complex response case (object with many attributes) is possible to extract them till one escalation level (using return field name and attribute, ex. object.attribute).

It's not supported a response object list.

Process manager

SAVE VERSION EDIT DIAGRAM BACK

Action: Call external Web service

Action title **md5**

Web service **md5**

Authentication

SET AUTHENTICATION

Parameters

Additional parameters

Parameter name	Parameter value
text	\$1-reference

ADD PARAMETER

Returned fields

original	md5
original	md5

ADD FIELD

SAVE CANCEL

## 16 - Cycle Related Record

This action allows to use the module related records, which are in a relation type of 1-N and N-N. For each rows of the related module is possible to perform the following actions: send an email, create an entity, update an entity, send notifications and create PDF. For the reason mentioned



above in the configuration of the actions is possible to map inside the fields the values that came from the module related records.

**BPMN-ScriptTask**

Create a new action **Cycle Related Records** on related module **Timetcards** and for each row:

**CREATE** **CANCEL**

No actions configured

**Process Helper**

**Action: Cycle Related Records**

Action title: **Cycle Related Records**

**Conditions**

Module: **Account**

**Informations** Info aggiuntive

### Account Information

Account Name	ID	Account No	AUTO GEN ON SAVE
\$50-crmd		Email	Select Option...
Phone	Select Option...	Citta	Select Option...
VAT Registration Number	Select Option...	note e appunti	Select Option...
Indirizzo	Select Option...		

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