

Release Note

vtenext 26.07

- [Processes](#)
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Processes

Action Cycle Records

New action to cycle through all records of a module. Filter and sort options are available.

The screenshot shows a configuration window titled "Action: Cycle Records". It includes a "Save" button and a "Cancel" button. The "Action title" field contains "cycle all cancelled customer and create a reminder". The "Execution mode" dropdown is set to "Standard: the execution process waits for the action to complete before proceeding to the next one". Below this, there are filters: "Filter" set to "All", "Ordered by" set to "Time created", and "Sorting" set to "Ascending order". A section titled "Conditions on related module Accounts" has a "New Group" button and a "New Condition" button. A condition is currently set: "Rating" equals "Project Cancelled". Below the conditions, the "Module" is set to "Event" and "Redirect to" is set to "--Please select--". At the bottom, there is an "Event Information" section.

Execution mode

For all process actions, you can specify the Execution Mode:

- Standard: the execution process waits for the action to complete before proceeding to the next one
- Background: the process stops and the action is executed in background by [worker](#) or cron

New options in conditions

"in" and "not in" options have been added to conditions on picklist fields to check multiple entries. In the "has changed" option, the "any value" entry has been added to check if a picklist field has changed to any value.

The screenshot shows two condition configurations. The first condition is "Lead Status" not in a list of values: "Cold", "Contact in Future", "Contacted", and "Hot". The second condition is "Lead Source" has changed to a list of values: "-- Any value --", "--None--", "Cold Call", and "Existing Customer". Both conditions are connected by an "And" operator.

New panel for process graph logs

Improved the process graph UI in the record detail view.

Lead Davis Jennifer

INFORMATION

PROCESS GRAPH

PROCESS HISTORY

HISTORY

Process

Conversione lead (v. 1.16)

Select actor

Lead to convert

Request details

Create account?

Create contact?

yes

exists

no

Create

Use ex

acc

Actions

Reset DF

Set status In conversion Davis Jennifer (Lead) X

Process Helper

admin (Administrator) has executed the action: about Davis Jennifer (Lead)

Details

Logs

admin (Administrator) passed in this activity from the BPMN-Task: Lead to convert

4 minutes ago

admin (Administrator) end the activity BPMN-UserTask: Request details

4 minutes ago

Tool-type Processes

You can create new **tool**-type processes that can be called multiple times within the same process or by multiple processes as if they were functions.

They can also be published as tools on an MCP server.

BPMN-Task: start

Activity_1yhozr4

Save

Cancel

Entity

--None--

When to run the check

on create

on create / change

on change

every time the condition is true

only the first time the process starts

when executed subprocess

on tool call

on relation with:

Input schema

Actions	Parameter name	Type	Entity	Required	Description
	ticket	entity	Ticket		The id of the helpdesk, with the format 'module_id' + 'x' + 'record_id'
	comment	string	--None--		text of the comment

Add row

AI Tools

LLM

You can configure an LLM model according to the [OpenAI format](#).

Configure LLM

Here you can configure an LLM model according to the [OpenAI format](#)

Test

Save

Cancel

Active☒

Name

URL

Model

Base URL

Provider

API Key

Temperature

Model ID used to generate the response.

If it is a local model and you want to use it in agents you need to specify the endpoint URL.

To use the model in agents you need to specify the `model_provider`. See supported providers in [LangChain Reference](#).

What sampling temperature to use, between 0 and 2. Higher

MCP Server

You can configure the MCP servers that VTENEXT exposes. For each server, you can select which tools to publish using REST APIs, custom tools, and Processes.

Technical documentation is available [here](#).

Configure MCP Server

Configure the MCP servers that vtenext exposes. For each server, select the tools to publish.

Active

☒

Base URL

http://192.168.1.48/vte2604_3477/restapi/v1/vtews/

Endpoint

http://192.168.1.48/vte2604_3477/restapi/v1/vtews/

my-mcp

Unique identifier used in the server URL endpoint.

Description

Create MCP client

☐

Automatically create an MCP client entry pointing to this server. The client will be kept in sync and deleted when the server is removed.

Published tools

Search...

(17 / 22 selected)

Base

Select

create

✓

Create a record of the specified module. To understand the fields of the specified module, you should u...

delete

✓

Delete the specified record

describe

✓

Describe the specified module and their relative fields; you must run this tool before attempting any task, to...

listtypes

✓

List the modules that have fields with 'uitype' of the specified formats

processes.processes_relat

○

ed_to

Retrieves all processes related to a specific CRM record.

query

✓

Safely execute a SQL-like query and return the result's rows. Additional notes: - The 'FROM' clause accept...

relate

✓

Relate the record with all the records in a relatelist array

retrieve

✓

Illustrate the fields of the specified record and their relative values

retrieveInventory

✓

Illustrate the fields of the specified inventory record, their relative values and the product block's information

touch.get_associated_pro

○

ducts

Retrieves the list of products associated with an inventory record (Invoices, Quotes, etc.).

touch.get_currencies

✓

Retrieves the list of active or all

touch.get_notifications

○

Retrieves svstem notifications for the

touch.get_ticket_comment

○

s

touch.write_ticket_comme

○

nt

updateRecord

✓

Update the specified record with new

MCP Client

You can configure the MCP servers whose tools you want to use. Only servers exposed via HTTP are supported.

By default you get a VTENEXT MCP and [Exa](#) MCP installed for web searches.

Configure MCP client

On save, the tool configuration will be downloaded locally so it can be used in processes and agents.

Active☒

Name

URL

Authentication

None

Synchronize☐

Notification☐

If "VTE (Access Key)" is selected, the dedicated MCP access key of the user making the call will be used automatically for authentication. No credentials need to be entered.

Allow a cron job to periodically check the list of tools and synchronize them if new information is available.

Notify me if there are any changes to the tools.

Available tools

add_comment tool di aggiunta commento ad un ticket	Input schema		
	ticket	string	REQUIRED The id of the helpdesk, with the format 'module_id' + 'x' + 'record_id'
	commento	string	REQUIRED testo del commento
convert_lead Starts the process for lead conversion	Input schema		
	leadid	integer	REQUIRED The ID of the lead to convert
	Output schema		
	info	string	OPTIONAL The information if the process was delegated succesfully.
	error	string	OPTIONAL Error message if the lead conversion could not be delegated to a process.
create	Input schema		

Agents

You can configure AI agents to use in your assistant and processes. An agent can use LLMs, MCP tools and RAG to complete tasks automatically.

Agents

Add

ACTIVE	NAME	DESCRIPTION	TYPE	LLM	DOCUMENTS	TOOLS
✓	My agent		Agent	gpt-oss:120b cloud	✓	

Agents orchestrator

The vtenext agents orchestrator coordinates agents and executes automated tasks. Install it following the manual.

[Open the installation manual](#)

Orchestrator endpoint

Update

Base URL of the orchestrator service (e.g. <http://127.0.0.1:8080>).

Assistant

The new assistant is called **Kitt** but you can change his name and photo from the user preferences. The assistant can query an LLM, an Agent or a custom REST Webservice.

Save

Active

☒

Type

Agent

Agent

Agente per assistente

Potential advancement

[Edit](#)

- [Calendar](#)
- [Checklist](#)
- [Email](#)
- [Star](#)
- [Alert](#)
- [Link](#)
- [More](#)

INFORMATION	PLAYERS	PRODUCT LINES	CHARTS	PROCESS GRAPH	PROCESS HISTORY
Potential Information:					
Potential Name	Potential No				
advancement	POT19				
Related To	Amount (€)				
demovte	184400.00				
Type	Expected Close Date				
--None--	14-06-2026				
Effective closing date	Lead Source				
04-08-2026	Trade Show				
Next Step	Assigned To				
	bagnato (Klazina Bagnato)				
Sales Stage	Campaign Source				
Value Proposition	User Conference				
Probability (%)	Modified Time				
45.88	25-06-2026 10:15:25				

SHORTCUTS

- Talks
- Notes

RELATIONS

- Activities
- Contacts
- Products
- Documents
- Quotes
- Sales Order
- Accounts

Kitt

Related to **advancement**

Monday 29-06-2026

You
Hello

Kitt
Hello! How can I assist you with VTENEXT today?

You
What is the status of this opportunity?

Kitt
The opportunity **advancement** is currently in the "Value Proposition" sales stage.

Potentials x advancement x

Continue the conversation with the assistant

- summarize
- process text
- translate

These quick actions can also be published as MCP tools.

Where do we start?

Tell me directly what you need

Start a conversation with the assistant

Trouble Tickets x IPERAMMORTAMENTO 2026... x

Or choose a quick action

- Process text
- Description summary
- Summary of comments

Agent Logs

An entry has been added in Settings > System logs to control agent logs.

AI actions in ProcessMaker

You can configure process actions and run:

Call LLM

Make a request to an LLM and use the response in the process.

Call MCP tool

Run an MCP tool.

Call agent

Make a request to an Agent to complete tasks automatically and use the response in the process.

Call process tool

Run a [tool-type Process](#).

Other improvements

Worker

The worker is the new service for immediately executing operations in background (without blocking the user interface) and without having to delegate the operation to a cron job and therefore wait the minimum time of 1 minute.

The worker receives a request to execute via PHP and then sends the response directly to the browser via SSE events.

It has currently been implemented to perform the following operations:

- notifications (ModNotifications)
- process actions with background execution mode
- all requests to the new AI tools

Technical documentation is available [here](#).

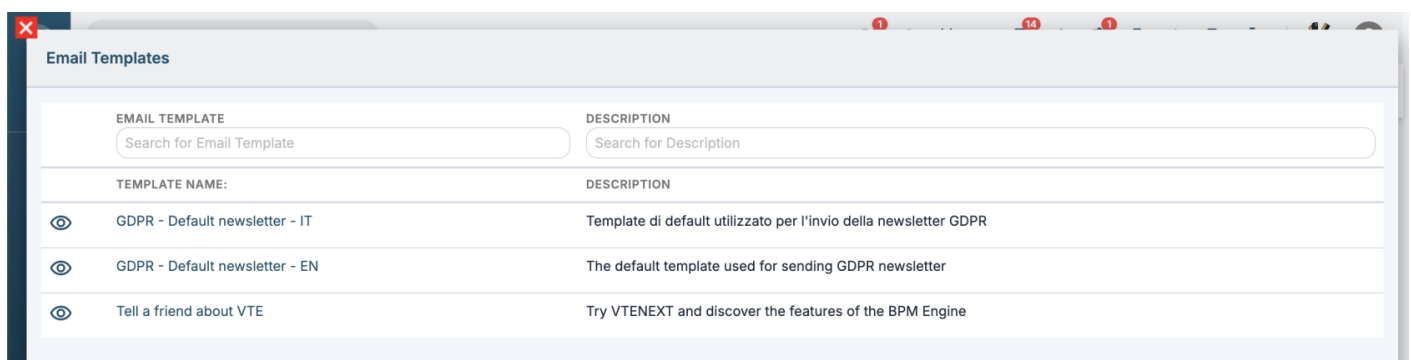
Expiration in Access Keys

In **User Preferences > Webservices, REST Api Configuration** you can specify an expiration date for new access keys.

When expired, the Accessk Key will be deleted.

Email template list in newsletter is now searchable

Added grid search in email templates in newsletter.



Improved scheduled reports

In the scheduled report configuration, two options have been added:

1. Exclude holidays/weekends (holidays are related to the "Holiday Countries" field in the admin user's user profile)
2. Exclude empty reports

Customize Report

1. Report Details

2. Report Type

3. Time filter

4. Advanced Filters

5. Top-down clusters

6. Select Columns

7. Calculations

8. Sharing

9. Scheduled execution

< Back

Scheduled execution
Schedule the automatic execution and send the result to the chosen recipients

☒ Schedule report

Frequency

Hourly

Days to exclude

--None--

Exclude empty reports

☐

Report format

Excel

Select:

User(s)

Selected recipients

Widgets' title

Possibility to edit home page widgets' title

Counting by state

Title

Counting by state

Size

2

Save

Cancel

1

0.9

0.8

0.7

0.6

0.5

0.4

0.3