

# 17.1 Process Manager

The Process Manager is the tool that makes it possible to manage processes within a company, interpreting the drawings generated through a Business Process Model and the Notification tool (for example [www.bpmn.io](http://www.bpmn.io)).

These tools represent all the automatic processes that will generate the company workflows in charts and diagrams, which will then be generated by the vtenext Process Manager.

**Versioning:** All settings for processes can be saved, generating a version (e.g. v.1.0). Versions can be exported or imported to ensure a higher level of security during setup.

## Import the process into vtenext and Process Helper

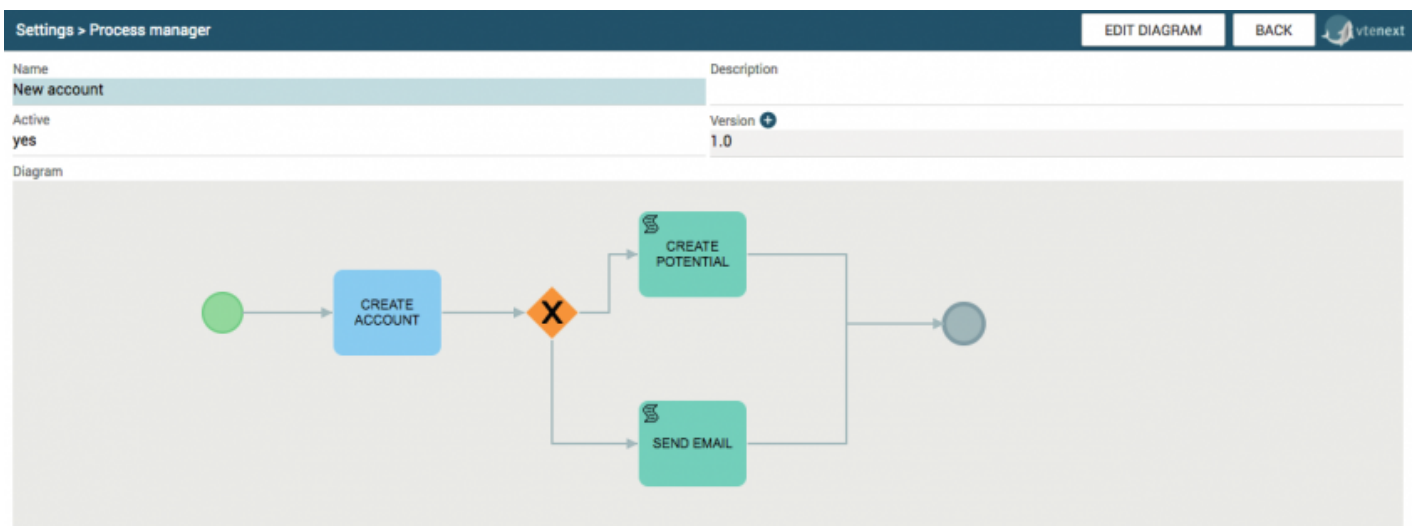
Settings > Process manager  
Allow to create custom processes

Show 50 entries New

Search: \_\_\_\_\_

Actions	Name	Description	Subprocesses	CRM Module	Active
<a href="#">×</a> <a href="#">+</a> <a href="#">↓</a> <a href="#">↑</a>	Gestione Analfisi Laboratorio	ITA			no
<a href="#">×</a> <a href="#">+</a> <a href="#">↓</a> <a href="#">↑</a>	Nuova Richiesta Iscrizione	ITA			no

From the screen below, accessible from Settings > Process Manager, you can import the processes created in the BPMN tool.



By clicking on Import BPMN, you can browse your hard disk and load the diagram created. It is also possible to load processes previously carried out with vtenext by clicking on the Import vtenext BPMN button.

Clicking on the task opens the screen where you can set the conditions. Since you want something to happen every time a company is created:

The screenshot shows the configuration interface for a BPMN task named "Crea Azienda rating = Attivo". The interface includes a "Save" button and a "Cancel" button in the top right corner. Below the task name, there is a dropdown menu for "Entity" set to "Account". Under the heading "When to run the check", the "on create" option is selected. Other options include "on create / change", "on change", "every time the condition is true", "when executed subprocess", and "on relation with:" (set to "Potentials"). A "Conditions" section contains a dropdown for "Rating", an "equals" operator, and a dropdown for "Active". A "New Condition" button is located below the conditions. A "New Group" button is also visible on the right side of the conditions section.

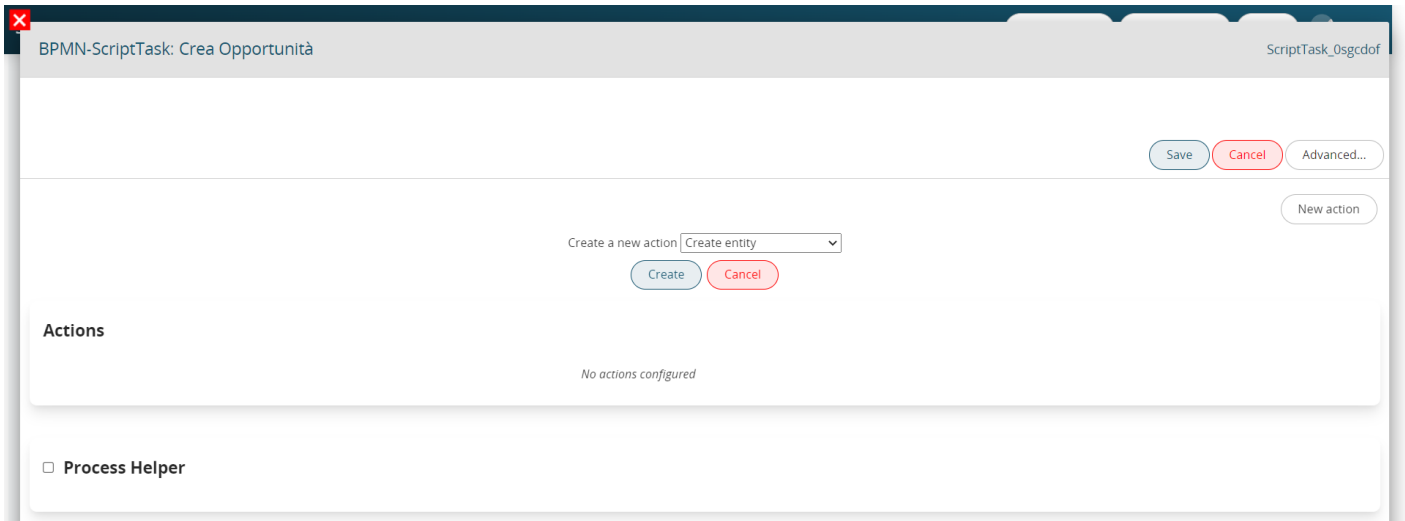
- In Entity choose Account
- In "when to check" select "first save only"
- Click on the "New Group" button
- Set "Rating" equal to "Active"
- Click on Save

By clicking on the "gateway" task, you can set if/else conditions. You can then select the following from the respective drop-down menus:

The screenshot shows the configuration interface for an Exclusive Gateway task. The task name is "Crea Azienda rating = Attivo". The condition "Rating equals Active" is displayed. Below the condition, there are two dropdown menus for "else go to". The first dropdown is set to "ScriptTask: Crea Opportunità" and the second is set to "ScriptTask: Manda E-Mail". "Save" and "Cancel" buttons are located in the top right corner.

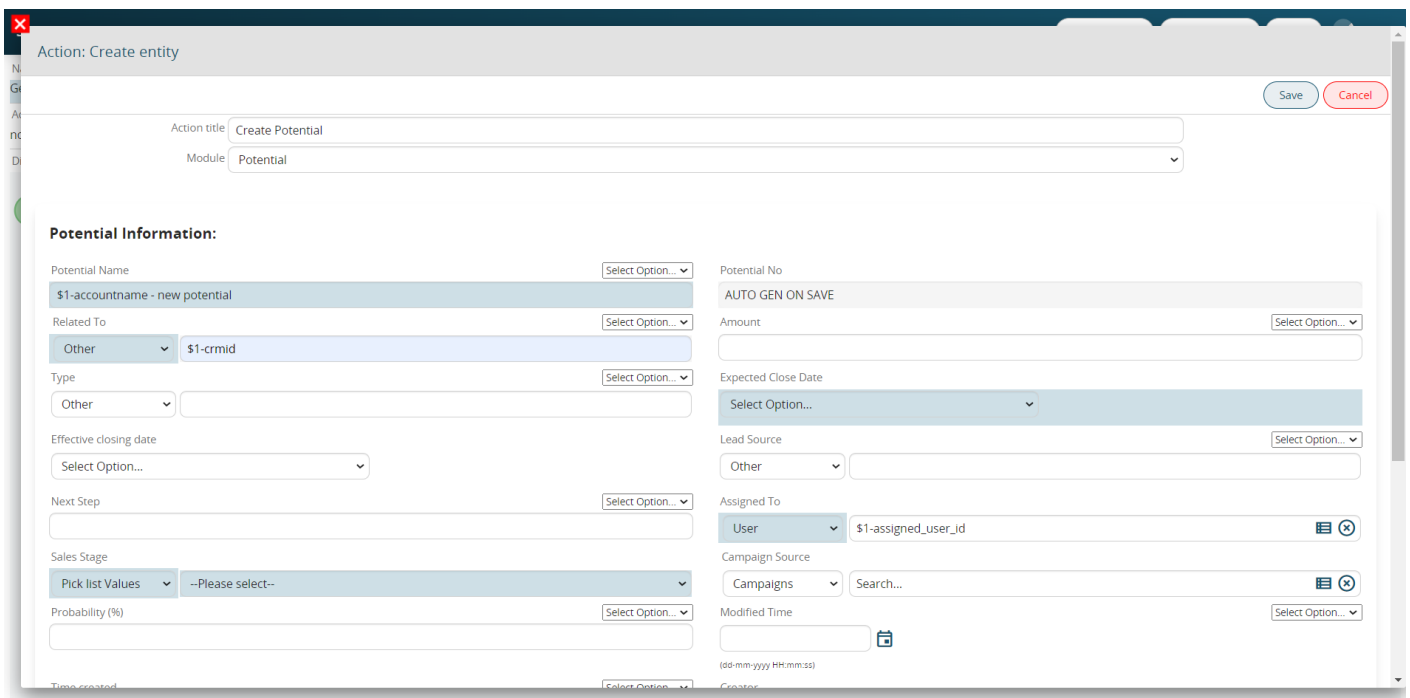
- in Active equals Rating, choose "ScriptTask: create potentials"
- in otherwise go to, select "ScriptTask: send email"
- click on Save

By clicking on the "create potentials" task, you can set the expected actions using the respective drop-down menus:



- click on New Action
- in Create a new type of action, select "Create Entity"
- click on Create

Clicking on "create" opens the screen that allows you to set the variables that will automatically compile the new Potential.



- Edit the fields using the variables made available by the module
- Once you have completed the fields, click on Save

In the Process Manager you can create entities (processes) associated with any CRM module, which contain a set of instructions that allow you to configure the different phases of the business process.

These phases are managed through dynamic forms, which the user can utilise to move within the flow and which are modified by the Process Manager according to the status of the business

process that the user is located in. The Process Helper is a tool that allows you to configure the instructions to be executed at each stage of the business process and to set the conditions that, if verified, carry out dynamic form changes. Through the Process Helper, it is also possible to define the default assignee and the entity associated with the process.

In the "Process Helper", you have the option of inserting the suggestions to be given to the operator in order to be able to follow the work process.

The screenshot shows the configuration interface for a BPMN-ScriptTask named "Crea Opportunità". The interface includes a header with the task name and a user identifier "ScriptTask\_Osgcdof". Below the header are buttons for "Save", "Cancel", and "Advanced...", along with a "New action" button. The main area is divided into two sections: "Actions" and "Process Helper". The "Actions" section contains a table with columns "Tools" and "Action", showing a single entry "Create Potential". The "Process Helper" section is checked and contains several fields: "Assigned To" (User, mariobianchi12345@gmail.com (Mario Bianchi)), "Related to" (\$1-crmid), "Status" (Pick list Values, Running), "Requested action" (Verify that the filled fields are correct. The referring company is \$1-accountname), and checkboxes for "Show in the related entity" and "Show documents of the related entity". At the bottom, there is a "Manage dynamic form" section with buttons for "Add Block", "Import from dynaform...", and "Import from module...".

- Under Assigned you can enter a default assignee user
- In Related To you can use the company task variable
- In Instructions there is the option of inserting a comment that will be used by the operator to verify the status of the tasks

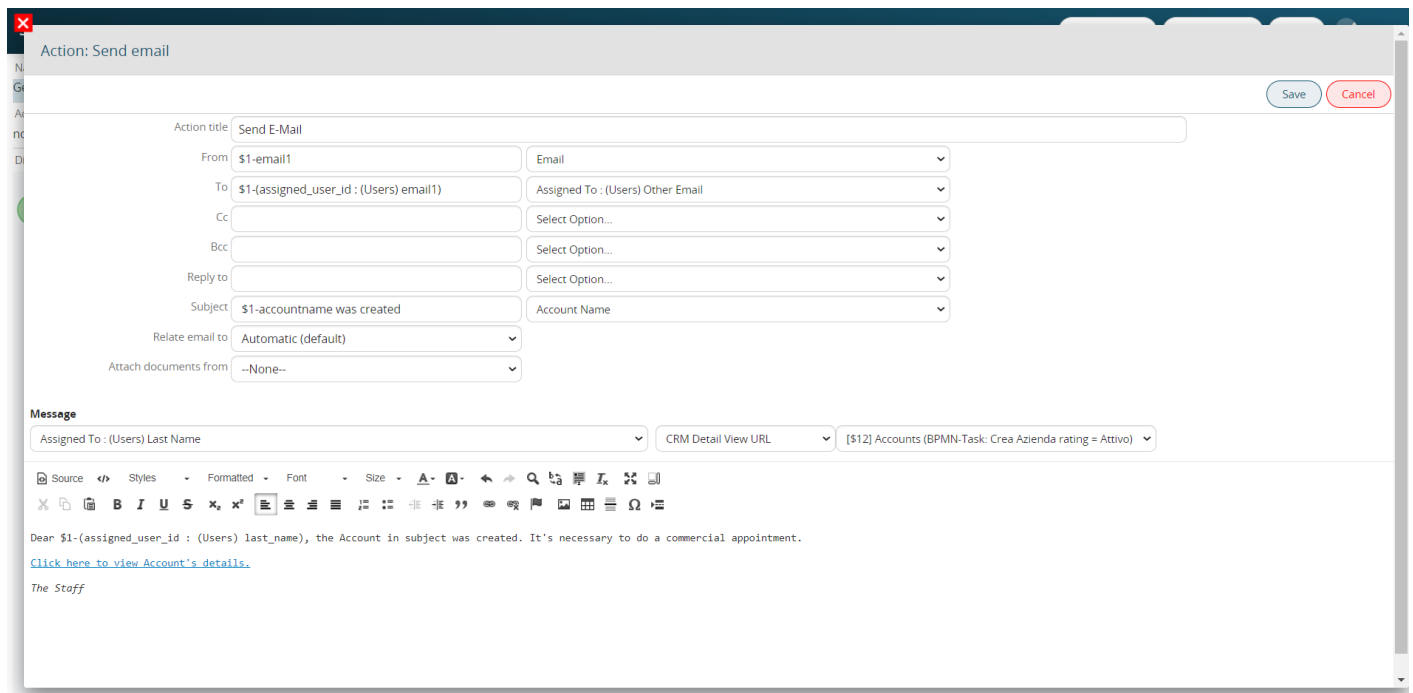
You must now set the actions in the "send email" task. By clicking on the task, you can enter the variables concerned:

The screenshot shows the configuration interface for a BPMN-ScriptTask named "Manda E-Mail". The interface includes a header with the task name and a user identifier "ScriptTask\_0hib0di". Below the header are buttons for "Save", "Cancel", and "Advanced...", along with a "New action" button. The main area is divided into two sections: "Actions" and "Process Helper". The "Actions" section contains a "Create a new action" dropdown menu with "Send email" selected, and "Create" and "Cancel" buttons. Below this, it says "No actions configured". The "Process Helper" section is unchecked.

- In Create a new action type, select Email

- Click the Create button

At this point you can enter the variables by selecting the relevant fields from the drop-down menus (such as From, To, CC, Object, etc.)



In the space for the email text, you can enter a standard text and also use the variables to refer to the recipient by name, enter the company name and much more.

Finally, from the Modules > Processes menu, you can follow all the in-progress processes and check their progress within the initially imported diagram directly. For further information, please refer to the specific BPMN process manual.

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Revision #2

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