

# 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

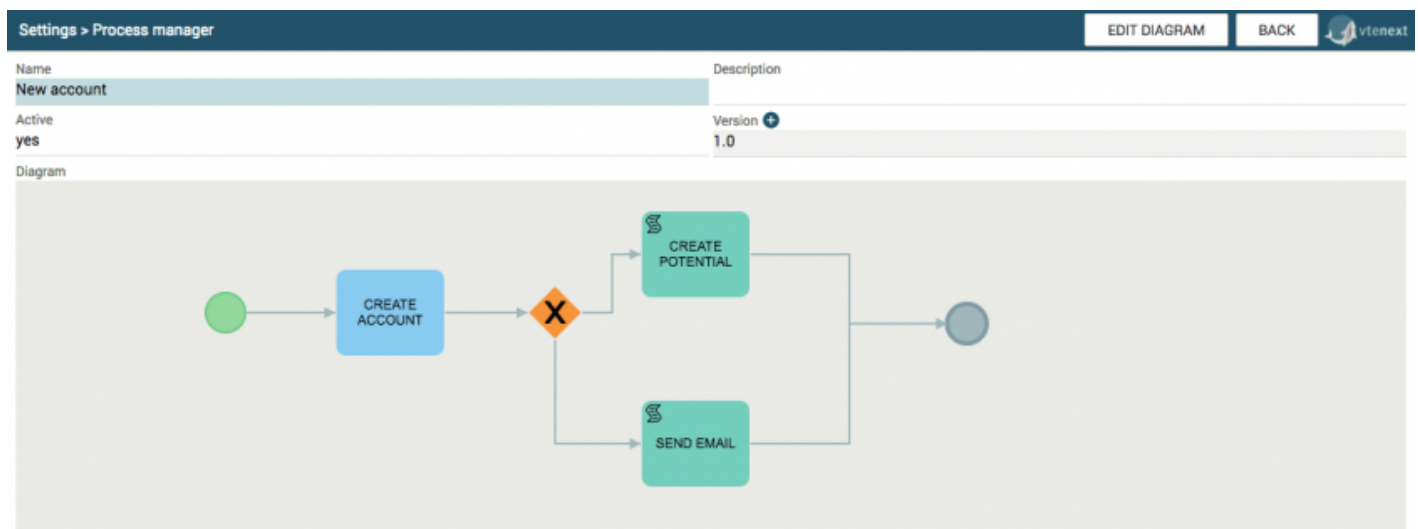
Show 50 entries

Search:

New

Actions	Name	Description	Subprocesses	CRM Module	Active
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Gestione Analisi Laboratorio	ITA			no
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	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 sidebar on the left with a red close button and a breadcrumb trail. The main area has a title bar with the task name and a "Task\_0160bk" identifier. Below the title bar, there are "Save" and "Cancel" buttons. The configuration section is divided into two main parts: "When to run the check" and "Conditions". In the "When to run the check" section, the "Entity" is set to "Account". Under "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: Potentials". The "Conditions" section shows a condition: "Rating" equals "Active". There is a "New Condition" button and a "New Group" button with a plus icon.

- 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 a BPMN Exclusive Gateway task named "BPMN-ExclusiveGateway". The interface includes a sidebar on the left with a red close button and a breadcrumb trail. The main area has a title bar with the task name and an "ExclusiveGateway\_01mrlu" identifier. Below the title bar, there are "Save" and "Cancel" buttons. The configuration section shows the condition "Crea Azienda rating = Attivo" and "Rating equals Active". Below this, there are two drop-down menus for "ScriptTask: Crea Opportunità" and "ScriptTask: Manda E-Mail".

- 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:

BPMN-ScriptTask: Crea Opportunità

ScriptTask\_Osgcdof

Save Cancel Advanced...

New action

Create a new action Create entity

Create Cancel

Actions

No actions configured

☐ Process Helper

- 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.

Action: Create entity

Save Cancel

Action title Create Potential

Module Potential

**Potential Information:**

Potential Name Select Option... \$1-accountname - new potential

Potential No AUTO GEN ON SAVE

Related To Select Option... Other \$1-crmid

Amount Select Option...

Expected Close Date Select Option...

Lead Source Select Option... Other

Assigned To User \$1-assigned\_user\_id

Campaign Source Campaigns Search...

Modified Time Select Option...

Effective closing date Select Option...

Next Step Select Option...

Sales Stage Pick list Values --Please select--

Probability (%) Select Option...

Time created Select Option...

Creator

- 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 window for a BPMN-ScriptTask named "Crea Opportunità". The window has a title bar with a close button and a tab labeled "ScriptTask\_Osgcdof". Below the title bar, there are buttons for "Save", "Cancel", and "Advanced...". A "New action" button is also present. The main content area is divided into two sections: "Actions" and "Process Helper". The "Actions" section shows a table with one action: "Create Potential". The "Process Helper" section is checked and contains the following fields: "Assigned To" (User), "Related to" (\$1-crmid), "Status" (Running), and "Requested action" (Verify that the filled fields are correct. The referring company is \$1-accountname). There are also 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 window for a BPMN-ScriptTask named "Manda E-Mail". The window has a title bar with a close button and a tab labeled "ScriptTask\_0hib0di". Below the title bar, there are buttons for "Save", "Cancel", and "Advanced...". A "New action" button is also present. The main content area is divided into two sections: "Create a new action" and "Actions". The "Create a new action" section shows a dropdown menu set to "Send email" and buttons for "Create" and "Cancel". The "Actions" section is empty, showing "No actions configured". Below the "Actions" section, there is a checkbox for "Process Helper" which 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.)

Action: Send email

Save Cancel

Action title

From: \$1-email1

To: \$1-(assigned\_user\_id : (Users) email1)

Cc: Select Option...

Bcc: Select Option...

Reply to: Select Option...

Subject: \$1-accountname was created

Relate email to: Automatic (default)

Attach documents from: --None--

Message

Assigned To : (Users) Last Name

CRM Detail View URL

[12] Accounts (BPMN-Task: Crea Azienda rating = Attivo)

Source Styles Formatted Font Size A A

Dear \$1-(assigned\_user\_id : (Users) last\_name), the Account in subject was created. It's necessary to do a commercial appointment.

[Click here to view Account's details.](#)

The Staff

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.

Revision #2

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