

17.3 Status Manager

This tool makes it possible to implement flow logics in the management of information through the definition of rules for the change in value of a field Status.

A practical example is given below.

A quote must be approved by the sales manager before being delivered to the customer. The agent creates the offer, submits it to the manager, who may decide to approve it or not. The budget cycle will therefore be characterised by the following status steps:



With the Status Manager it is possible to force the user to follow a predefined path, preventing them, for example, from delivering the quote if they have not received approval. This allows for greater control and exploitation of information, as well as making such approval cycles simpler to manage.

In addition, the logics can be defined based on the roles involved in the flow. Let's suppose, for example:


- agents are authorised to create offers, request approval and, if received, deliver the offer to the customer (the enabled steps are highlighted in blue in the diagram below);
- the sales manager is authorised to approve offers (their steps are highlighted in red).



Each step is stored in a history that accurately records the players involved and the actions carried out, allowing for monitoring of the progress of the flow.

Let's see how to implement the above example (via the administrator user).

STEP 1: From Settings > Standard Picklist Editor, set the Quote Status field with all necessary values: Created, Requested Approval, Not Approved, Approved, Delivered, Accepted, Rejected.


Settings > Picklist editor
Customize Picklist values in each module

Select Module:

Select the Picklist:
Add Edit Delete

Picklists Available in Quotes For:

* All accessible values for the role are shown below

Quote Stage		Carrier	
Created	Assign	FedEx	Assign
Delivered		UPS	
Reviewed		USPS	
Accepted		DHL	
Rejected		BlueDart	

STEP 2: Go to Settings > Status Manager, choose the Quotes module, then the Quote Status field, and click on "Enter in management".



Settings > Status Manager
Enable/Disable status transitions

Module:

Status field:
Manage

Warning! You can configure the Status Manager for only a single module field. If you try to activate the status manager on a second field, the system warns you that the operator is already active by turning the field they are actively working on in red.

STEP 3: Select the role through the relevant picklist. Keep in mind that the rules for change of status will apply to all users associated with this role.


Settings > Status Manager
Enable/Disable status transitions

Module:

Status field:

Role:

--None--
Roles::Manager
Roles::Agent

Unmanaged

Copy from Role: Copy

Back

STEP 4: Once the role has been chosen, the table for configuring the rules for value changes appears.

Module:

Status field:

Role:

Unmanaged

Copy from Role:

Copy

Initial status

--Please select--

	Created	Delivered	Reviewed	Accepted	Rejected
Created	++	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivered	<input type="checkbox"/>	++	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	++	<input type="checkbox"/>	<input type="checkbox"/>
Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	++	<input type="checkbox"/>
Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	++

Unselect all

Select all

Apply

First define the initial value that the field should take, when the selected role creates a new quote (each role may have different initial statuses). Then complete the configuration table with the status changes.

The table must be completed by line:

the symbol ++ represents the current status

- activate the flag ☒ at the allowed changes (from the current status to the destination status)
- deactivate the flag ☐ at unauthorised changes

You can activate all status changes or deactivate all changes using the Select All and Deselect All buttons. In the examples below, the configuration is different for manager and agent.

Initial status

Created

	Created	Delivered	Reviewed	Accepted	Rejected
Created	++	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivered	<input type="checkbox"/>	++	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	++	<input type="checkbox"/>	<input type="checkbox"/>
Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	++	<input type="checkbox"/>
Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	++

Unselect all

Select all

Apply

(final configuration for Agent role)

Initial status

Delivered

	Created	Delivered	Reviewed	Accepted	Rejected
Created	++	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delivered	<input type="checkbox"/>	++	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed	<input type="checkbox"/>	<input type="checkbox"/>	++	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	++	<input checked="" type="checkbox"/>
Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	++

Unselect all

Select all

Apply

(final configuration for Sales Manager role)

You can quickly copy a State Manager configuration for another role. After selecting the module, field and role you want to configure, select the role from which you want to copy the configuration and press Copy.

Attention! All roles must have a configured Status Manager.

Example of agent side use

The following is an example of utilising user-side CRM for the quote case, with Status Manager configured.

1. Creating New Quote. The new record will take on the Created status automatically and without the possibility of modification.
2. Changing the status. To change the field controlled by the Status Manager you must use the panel that is available inside the Other button on the right in the detail view.

The screenshot displays a CRM interface for a quote titled "Quote Preventivo vtenext onSite". The interface includes a sidebar with navigation icons, a top search bar, and a main content area with tabs for "INFORMATIONS", "PROCESS GRAPH", "PROCESS HISTORY", and "HISTORY". The "INFORMATIONS" tab is active, showing "Quote Information" and "Address Information".

Quote Information

Field	Value
Quote No	QUO2
Quote Stage	Reviewed
Valid Till	29-10-2007
Carrier	UPS
Potential Name	vteCRM Inc - 1000 units
Time created	30-04-2018 14:44:48
Creator	(Matteo Giarolo)
Subject	Preventivo vtenext onSite
Shipping	
Contact Name	Williams Linda
Account Name	vtecrm
Assigned To	(Matteo Giarolo)
Modified Time	15-02-2022 18:00:00
Totale Provvigione (€)	250.00

Address Information

Field	Value
Billing Address	345 Sugar Blvd.
Inventory Manager	

An overlay menu is visible on the right side of the screen, containing the following options:

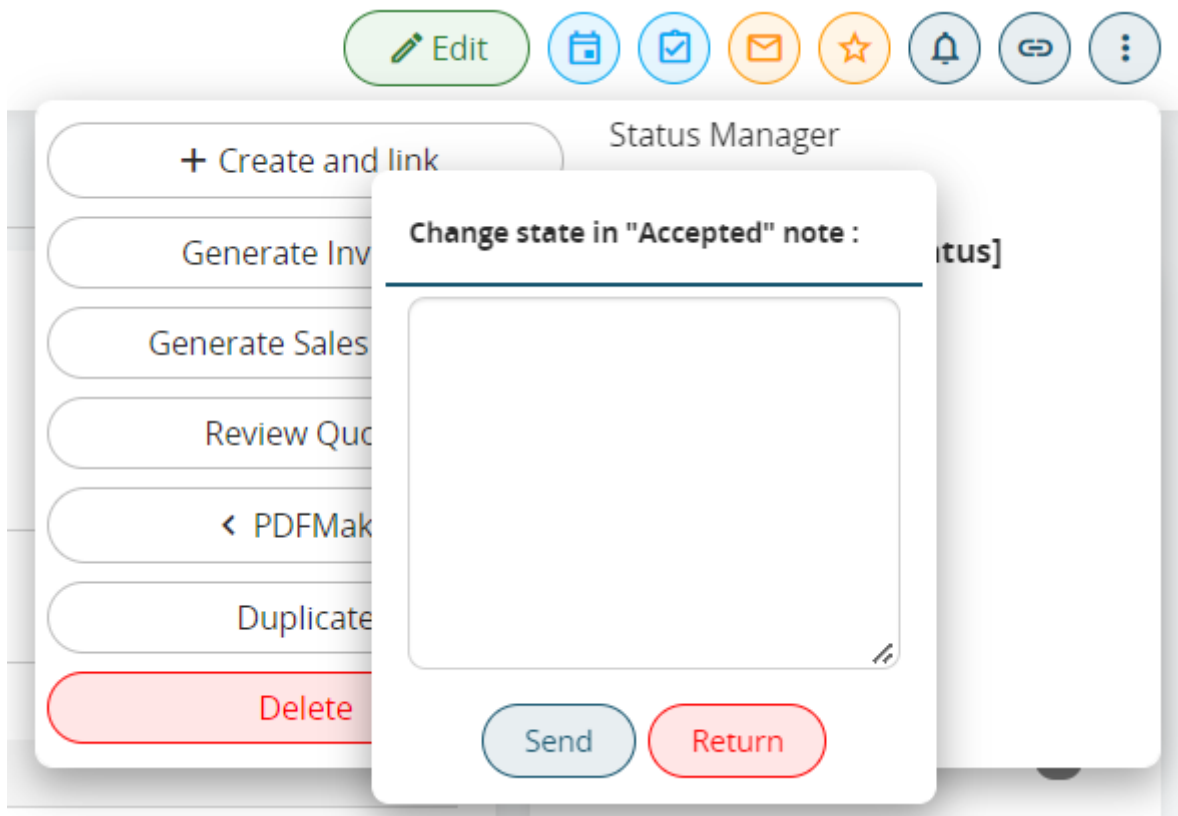
- + Create and link
- Generate Invoice
- Generate Sales Order
- Review Quote
- < PDFMaker
- Duplicate
- Delete

Below the overlay menu, a "Status Manager" panel is shown, indicating the current status is "Reviewed [Actual status]" and the previous status was "Accepted".

On the far right, a sidebar menu lists the following items:

- Activities
- Documents
- Messages
- Processes
- Status History

The panel shows the list of possible steps for the user. To change status, click on the new status entry and enter a note if necessary:



3. The Status History records each change in value.
The standard field of the entity will therefore not be modifiable via picklists.

S Status Manager - List						
id	old status	new status	user	note	date	
1	Delivered	Reviewed			08-06-2022 10:04:23	

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