

# Tabs

- Business process Instance
- Steps

# Business process Instance

The screenshot shows a web application interface for a 'Business Process Instance'. The browser's address bar shows 'Home (7)' and 'Business Process Instance: ...'. The application has a top navigation bar with various icons. The main content area is titled 'Business Process Instance' and shows a form with the following fields:

Data requested	
Client*	XYZ Foundation
Business Process Header	Sales Order Creation
Name*	SO Creation Due to Start on 26/11/2019
Description	
Date Start	26/11/2019 12:00:00 AM
Instance Status*	Finalised and Archived
Organization*	MainHQ
User/Contact*	harishprabu.g
Due Date	02/12/2019
Finish Date	29/04/2020 12:00:00 AM
	<input checked="" type="checkbox"/> Processed

## Critical fields:

- 1) Business process header - It is used to display name details from business process template.
- 2) User/contact - The User identifies a unique user in the system. This could be an internal user or a business partner contact
- 3) Name - The name of an entity (record) is used as a default search option in addition to the search key. The name is up to 60 characters in length.
- 4) Instance status - Business process Instance status will be mentioned

---

## Critical & one-time setup fields:

- 1) Organization Field- This Field is used to select the organization which you are going to process the order.
-

## **Non-critical fields:**

1) Description - Optional short description of the record

2) Date start - Date start for this order

3) Finish Date - The finish date is used to indicate when the project is expected to be completed or has been completed.

---

## **Serial number/Lot number (ASI):**

---

## **Zoom conditions:**

---

## **Customization:**

# Steps

The screenshot shows a web application interface for a 'Business Process Instance' step. The browser tab is 'Business Process Instance: ...'. The page has a navigation bar with 'Home (7)' and 'Business Process Instance > Step'. The form contains the following fields:

Client*	XYZ Foundation	Organization*	MainHQ
BPF Instance	SO Creation Due to Start on 26/11/2019	Business Process Step	Add Business Partner
Sequence	10	<input type="checkbox"/> Group Task	<input checked="" type="checkbox"/> Processed
User/Contact	harishprabu.g	Process Status*	Closed
Due Date	27/11/2019	Finish Date	
Days due	-1,358	Approved By	
Comments			
Reference document No		Reviewer Role	
	<input type="button" value="Record ID"/>	Document Status	Drafted
Priority		Error Msg	

## Critical fields:

- 1) Business process step - Step by step procedure will be mentioned in this field to find out task status
- 2) Sequence - It is used to mention sequence number based on business process step
- 3) User/Contact - The User identifies a unique user in the system. This could be an internal user or a business partner contact
- 4) Process status - To identify business process status

---

## Critical & one-time setup fields:

---

## **Non-critical fields:**

- 1) Due Date - Due date limit to be mentioned
- 2) Finish Date - The finish date is used to indicate when the project is expected to be completed or has been completed.
- 3) Due days - Date count will be displayed based on project start date
- 4) Approved by - Approver user details will be displayed
- 5) Comments - The Comments field allows for free form entry of additional information.
- 6) Reviewer role - Reviewer role will be displayed if approval is set for particular transaction
- 7) Record Id - The Record ID is the internal unique identifier of a record. Please note that zooming to the record may not be successful for Orders, Invoices and Shipment/Receipts as sometimes the Sales Order type is not known.
- 8) Document status - It is used to track whether the document is completed or in-progress or draft stage.

---

## **Serial number/Lot number (ASI):**

---

## **Zoom conditions:**

---

**Customization:**