

Business process Instance

- Window Introduction
 - Introduction
- Tabs
 - Business process Instance
 - Steps
- Video
 - Instance video

Window Introduction

Introduction

Overview:

Business Case:

Tabs

Business process Instance

The screenshot shows a web browser window with a single tab titled 'Business Process Instance...'. The browser's address bar and toolbar are visible. Below the browser, the application interface displays a form titled 'Business Process Instance' with the subtitle 'Data requested'. The form is organized into two columns. The left column contains fields for 'Client' (XYZ Foundation), 'Business Process Header' (Sales Order Creation), 'Name' (SO Creation Due to Start on 26/11/2019), 'Description' (empty), 'Date Start' (26/11/2019 12:00:00 AM), and 'Instance Status' (Finalised and Archived). The right column contains fields for 'Organization' (MainHQ), 'User/Contact' (harishprabu.g), 'Due Date' (02/12/2019), 'Finish Date' (29/04/2020 12:00:00 AM), and a 'Processed' checkbox which is checked. The browser's status bar at the bottom right shows '1/18'.

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:

Tabs

Steps

The screenshot shows a web application interface for a Business Process Instance. The browser tabs include 'Home (7)' and 'Business Process Instance: ...'. The page title is 'Business Process Instance > Step'. The interface contains several input fields and checkboxes:

- Client:** XYZ Foundation
- Organization:** MainHQ
- BPF Instance:** SO Creation Due to Start on 26/11/2019
- Business Process Step:** Add Business Partner
- Sequence:** 10
- User/Contact:** harishprabu.g
- Process Status:** Closed
- Due Date:** 27/11/2019
- Days due:** -1,358
- Finish Date:** (empty)
- Approved By:** (empty)
- Comments:** (empty text area)
- Reference document No:** (empty)
- Reviewer Role:** (empty)
- Document Status:** Drafted
- Priority:** (empty)
- Error Msg:** (empty)
- Group Task:**
- Processed:**

There is also a 'Record ID' button with a magnifying glass icon.

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:

Video

Video

Instance video

<https://www.youtube.com/watch?v=pLO24SLClig>