

# Business process Instance

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# Window Introduction

# Introduction

## **Overview:**

## **Business Case:**

# Tabs

# 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 'Data requested'. The form contains several fields: 'Client' (XYZ Foundation), 'Organization' (MainHQ), 'Business Process Header' (Sales Order Creation), 'User/Contact' (harishprabu.g), 'Name' (SO Creation Due to Start on 26/11/2019), 'Due Date' (02/12/2019), 'Description' (empty), 'Date Start' (26/11/2019 12:00:00 AM), 'Finish Date' (29/04/2020 12:00:00 AM), and 'Instance Status' (Finalised and Archived). There is also a 'Processed' checkbox which is checked.

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

## 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 an 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

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## Critical & one-time setup fields:

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

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## **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.

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

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## **Zoom conditions:**

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## **Customization:**

# Steps

The screenshot shows a web application interface for a 'Business Process Instance'. The browser tab is 'Business Process Instance: ...'. The page has a navigation bar with 'Home (7)' and 'Business Process Instance: ...'. Below the navigation bar is a toolbar with various icons. The main content area is titled '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
- User/Contact:** harishprabu.g
- Process Status:** Closed
- Due Date:** 27/11/2019
- Finish Date:** (empty)
- Days due:** -1,358
- Approved By:** (empty)
- Comments:** (empty text area)
- Reference document No:** (empty)
- Reviewer Role:** (empty)
- Document Status:** Drafted
- Record ID:** (empty)
- Priority:** (empty)
- Error Msg:** (empty)

## 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:

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## **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.

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

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## **Zoom conditions:**

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**Customization:**

# Video

Video

# Instance video

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