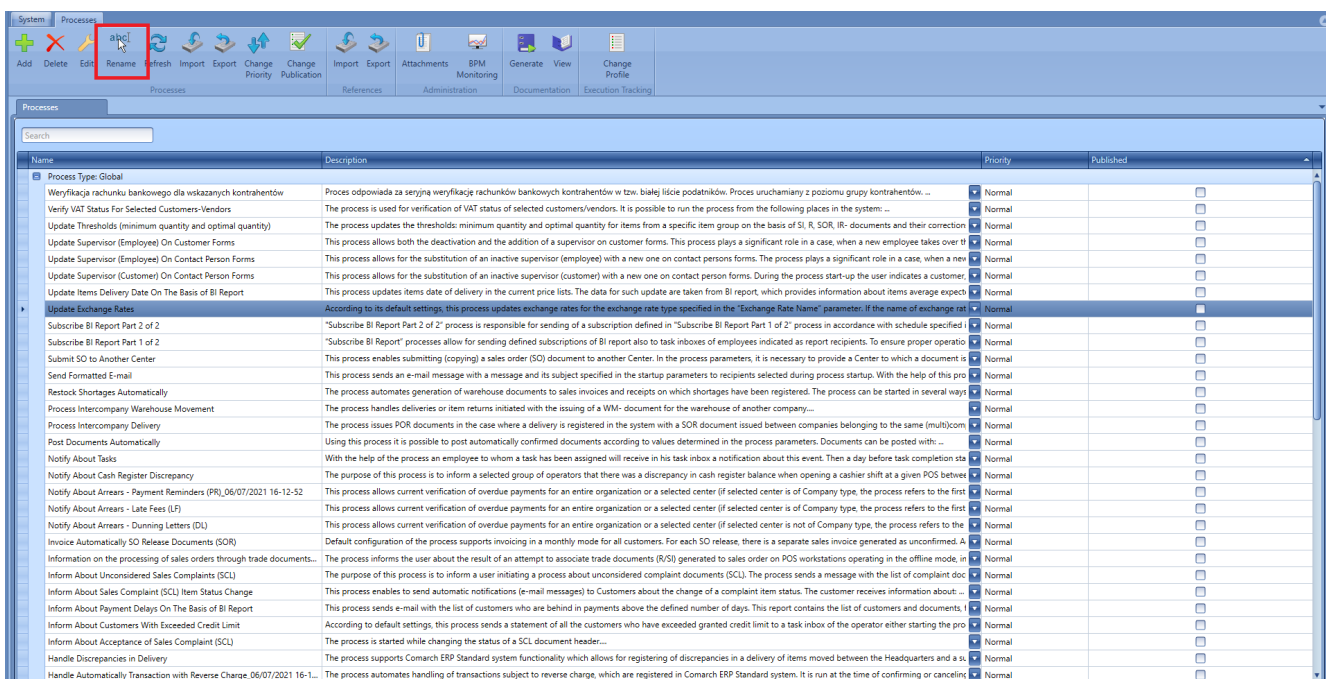


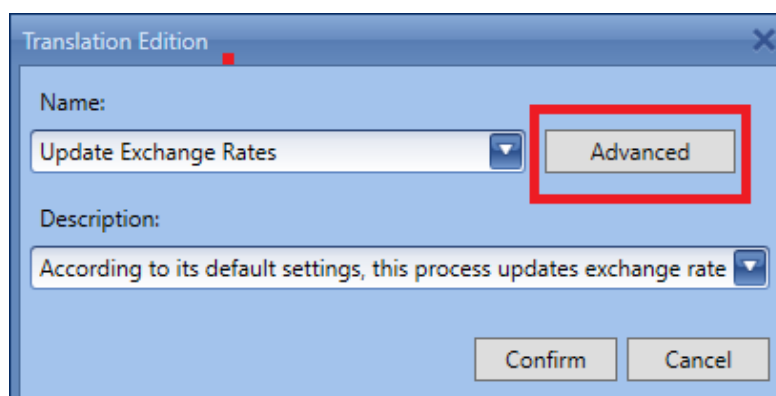
Working in different languages

Translating processes

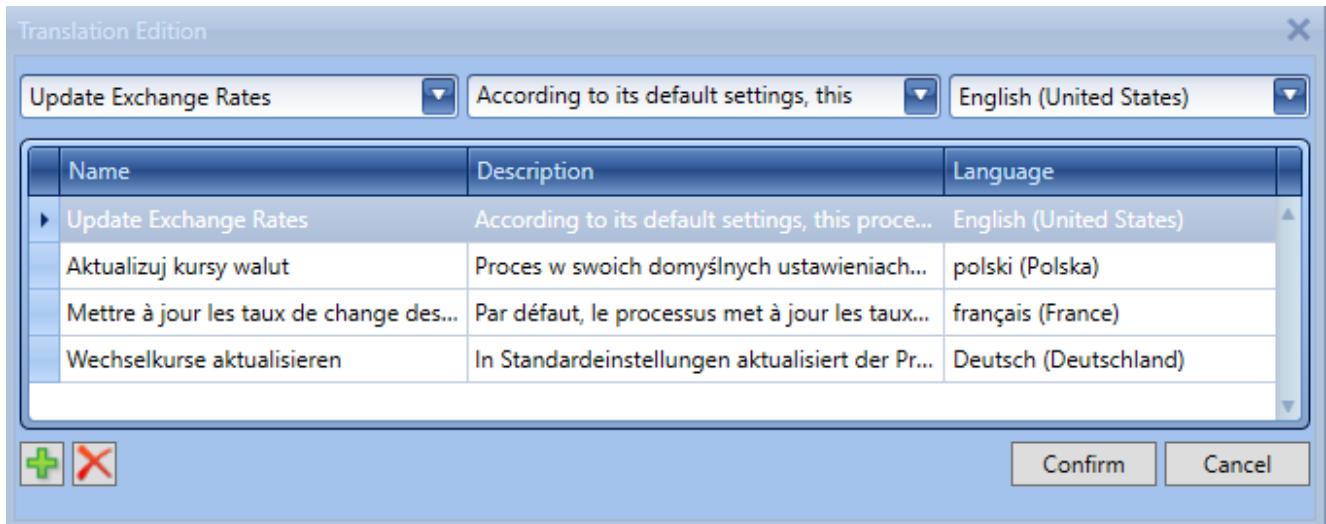
To add/edit the name and description of a process in another language, it is necessary to mark such process and select [**Rename**], and next [**Advanced**] button.



Changing name and translations of a process



Editing process name

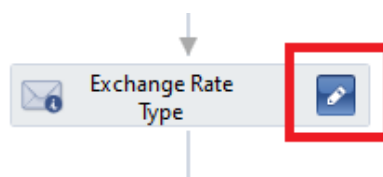


Editing process translations

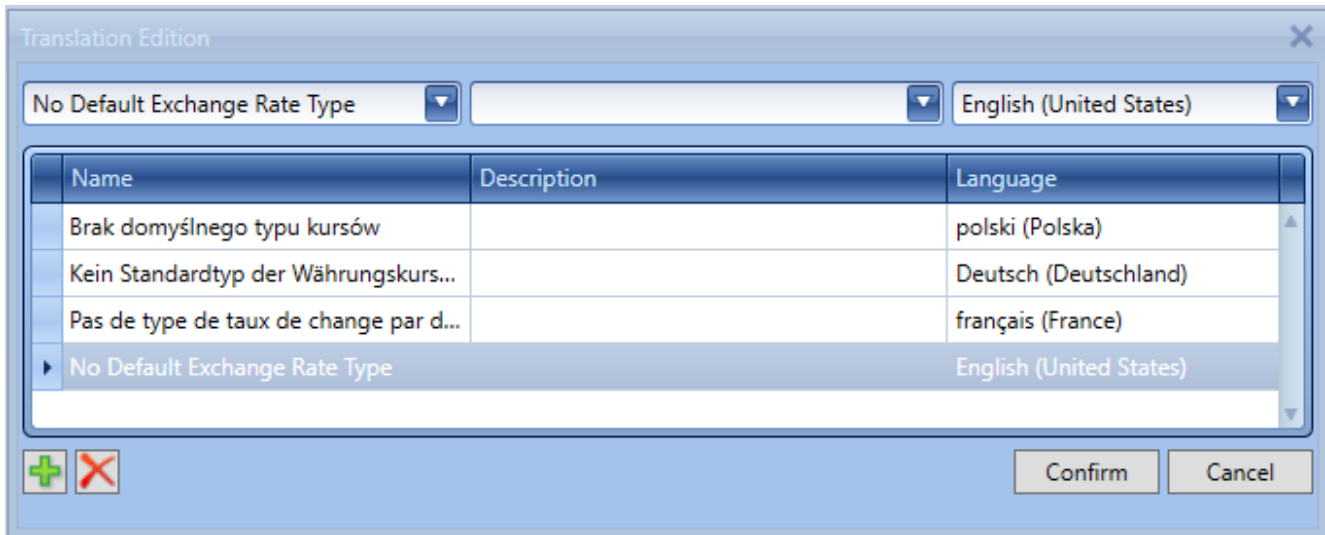
To add translation to a process, it is necessary to select the plus button, choose the language and complete the name field. To edit a translation, it is necessary to mark a given entry and modify relevant fields. After entering the modifications, click on [**Confirm**] button.

Translating activities

To add/edit translations for activities in the BPM editor, it is necessary to click on the pencil icon placed on the element. These translations are defined in the same way as process translations.



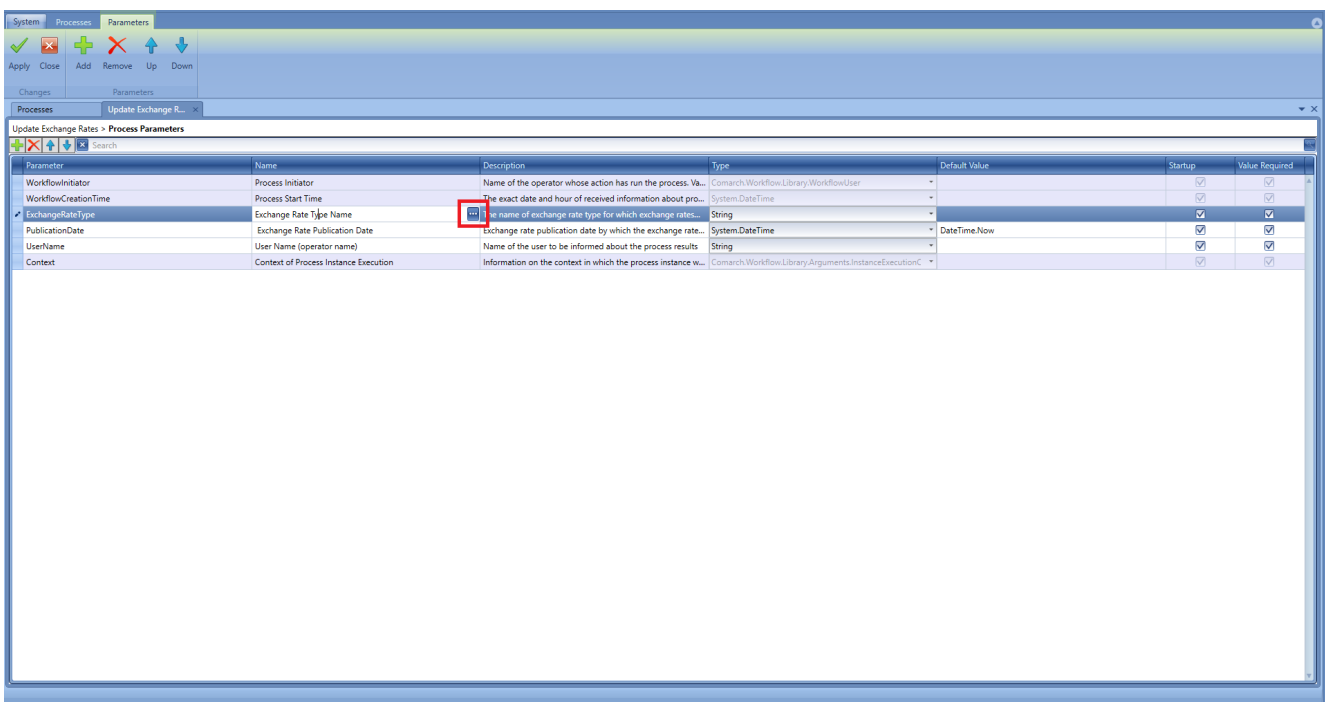
Translating activities



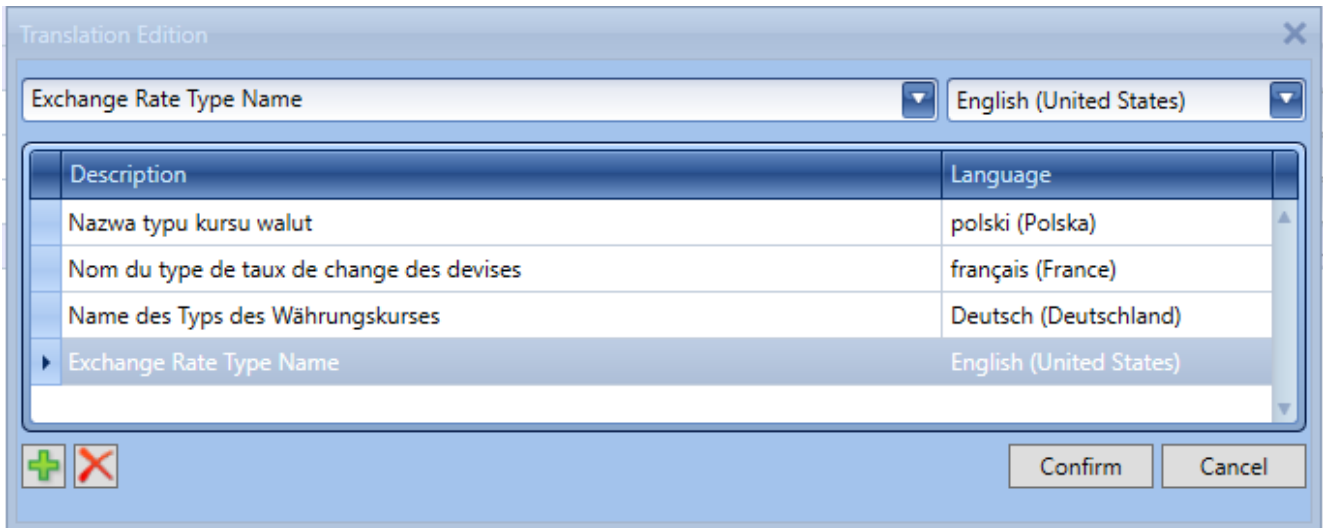
Editing activities translations

Translating parameters

To add/edit translations of <<parameters>>, it is necessary to select [...] button during the edition of the file to which the translation is to be added. It can be done both for the name and description.



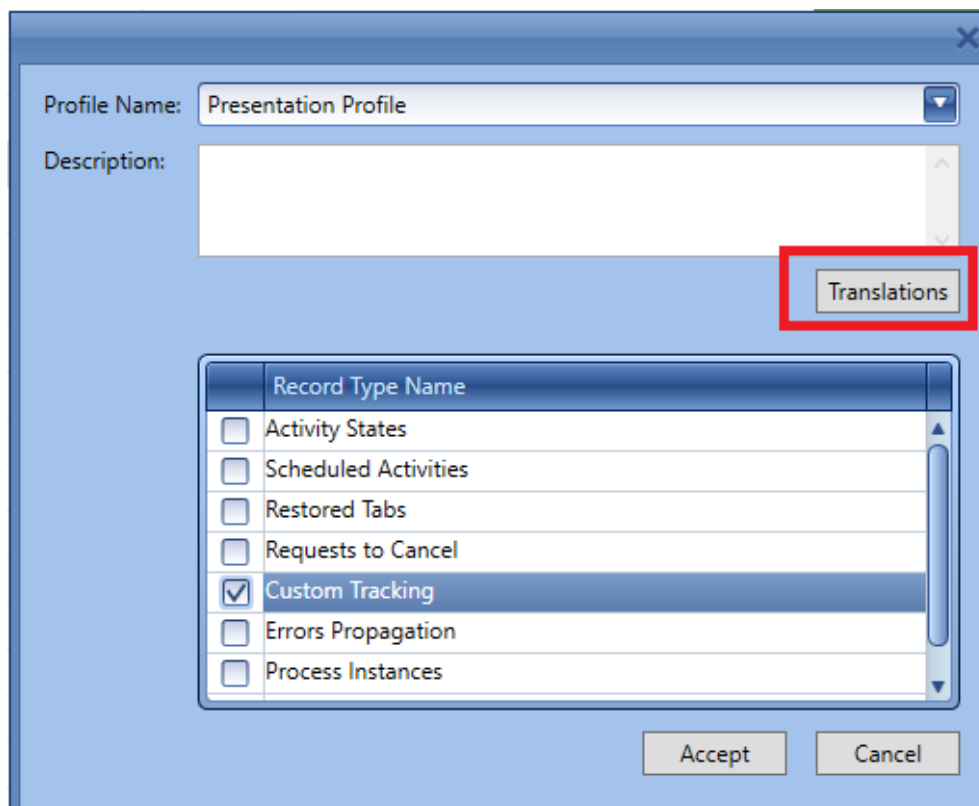
Translating parameter



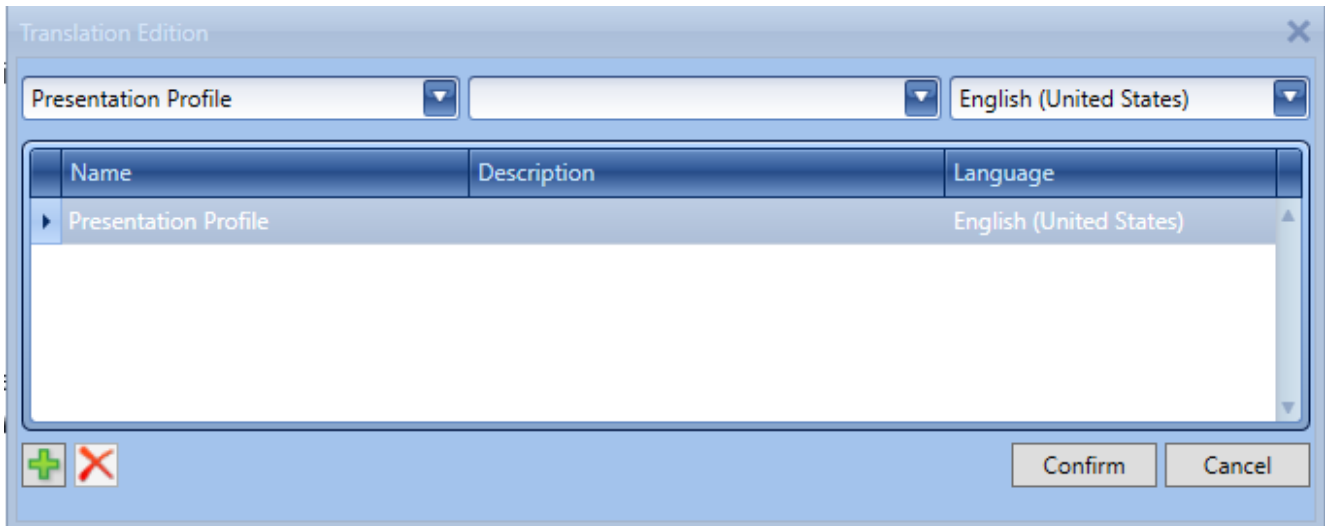
Editing parameter translations

Translating tracking profiles

To add/edit translations of <<tracking profiles>>, it is necessary to select [Translations] button when editing or adding new profile.



Translating tracking profile



Editing tracking profile translations

Good practices

Below, there is a list of good practices, that list suggestions, thanks to which the work with processes can turn out easier and processes more effective.

Readability

- Using flowchart as a main activity
- It is necessary to group activities with the use of the activity *Sequence/Flowchart* activities with the same scope (e.g. adding a SI item or setting a customer/vendor) and name and localize them in a proper way.

Multiculturalism

- Names of variables and input/output arguments should

- have English names or be abbreviations of English names
- Default names should be changed and <<translations>> should be added to them.
- Descriptions of parameters should contain information about the use of a given parameter.
- A process should have name and added description.
- The names of exported .wdf files should be in English.

Handling of errors

- It is necessary to complete fields left empty, e.g. e-mail address, to prevent occurring of exception *NullReferenceException*
- It is necessary to use *TryCatch* activity, if it's possible, in order to catch business exceptions. Information about errors can be sent to the task inbox

Configuration possibilities

- It is necessary to perform parametrization of process operation, e.g. by adding the possibility of selecting a center with permissions of which the process is to be performed.
- Parameters of SQL queries should be associated with variables or arguments to facilitate modification of process working.

Performance

- When preparing processes, it is necessary to remember that they must work on production databases. A test database used for verification of processes should correspond to the production database in terms of the quantity of data, so that already in the production phase it is possible to identify performance problems.
- A user should pay attention to the method of determining

scopes for variables. In case a given variable is used e.g. only inside a given sequence, its scope should not be set.

- To improve memory performance, it is possible to set unused variables to *null* in the further part of a process. When a process is waiting for decisions, the data regarding it is saved in the database. The less data is in the database, the less cache memory and memory in the database is occupied.

Integration with BI

In the Comarch ERP Standard BPM system, it is possible to use reports created in Comarch Business Intelligence. Before proceeding to the BPM configuration, it is necessary to:

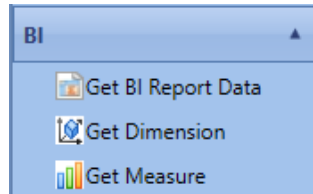
- Install Comarch Business Intelligence module
- Create BI databases for the company database (DW, LOG, META and REPO) and transform the company database.

BPM configuration in terms of BI

To add business activities associated with BI, in the references of a given process, it is necessary to select two assemblies:

- BI.Integration.dll
- BI.Integration.Interfaces.dll

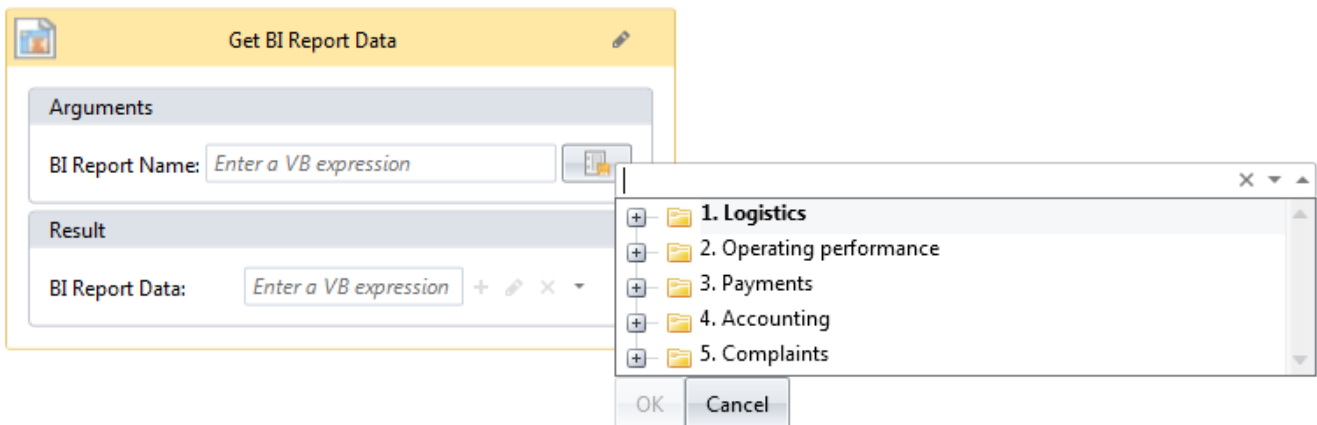
Detailed description of the process of importing of assemblies can be found in article [References](#).



BI activities

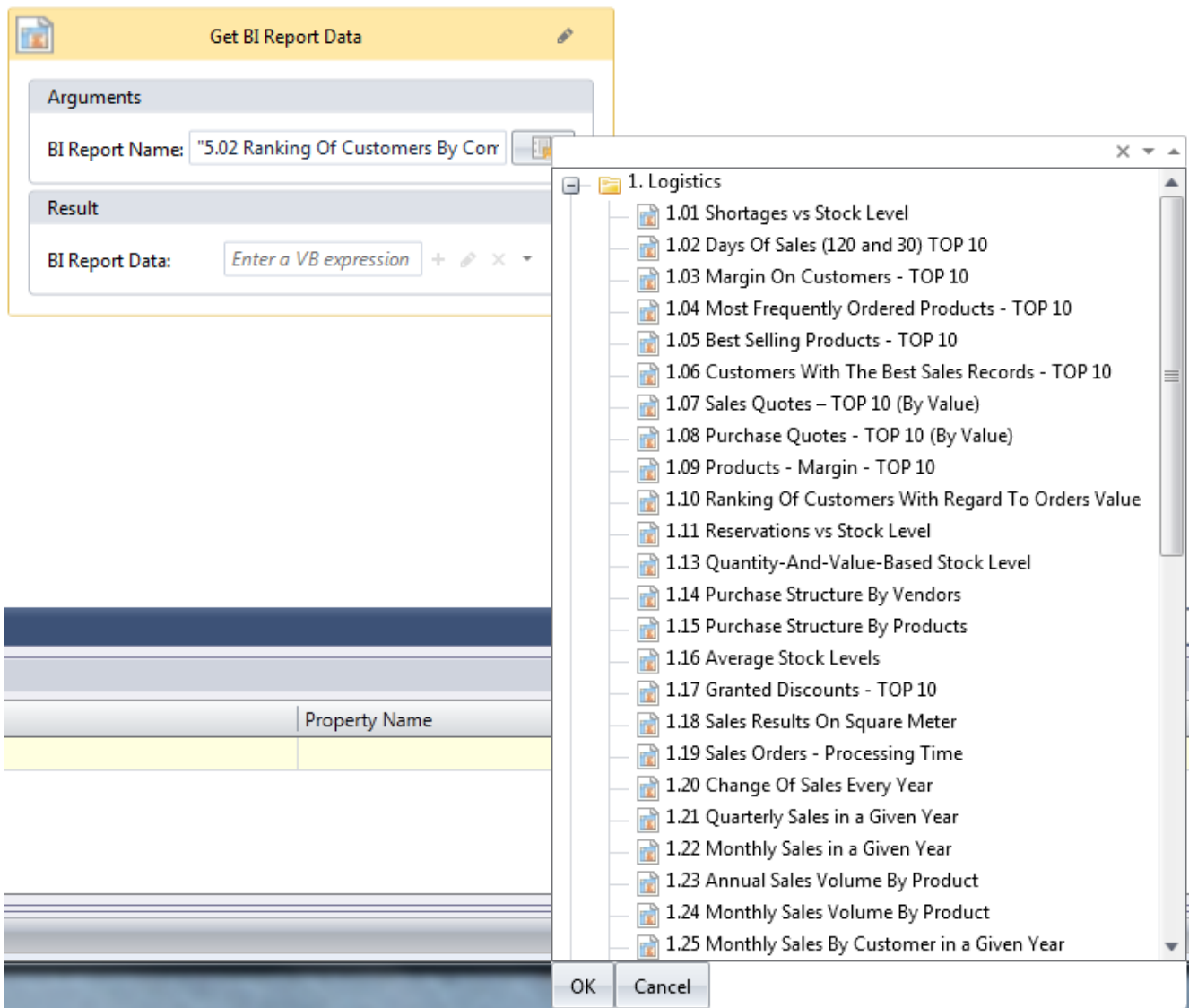
Retrieving data from a report

Retrieving data on the basis of a report is performed by selecting an appropriate report in the definition of the activity *Get BI Report Data*. Additionally, when indicating a report, a list of BI reports is retrieved from BI. Below, there is an example of opening a list of OLAP reports grouped by an analytical cube.



Selecting a BI report from the level of activity

After expanding each group, a list of BI reports available in a given area, is presented. After placing the mouse cursor over a selected report, the user can preview more details regarding it. A report description contains the following data: *Created On*, *Cube Name*, *Dimensions*, *Measures* and *Filters*.



BI report details from the level of an activity

Standard processes using BI

In the system, there are three standard processes which are based on BI reports:

- Inform about Payment Delays On The Basis of BI Report
- Update Items Delivery Date On The Basis of BI Report
- Generate a Series of Questionnaires for Top Vendors on the Basis of BI Report

To use the above-mentioned process, it is not necessary to add new the assemblies, as in case of creating individual processes. After importing the processes, the assemblies will be added automatically.

Apart from the above processes, there are two associated with each other processes which send BI subscription

- Subscribe BI Report Part 1 of 2
- Subscribe BI Report Part 2 of 2

To ensure proper operation of sending reports from to the task inbox, the following conditions must be fulfilled:

- Both BI processes must be imported and published
- BPM environment must be properly configured ([BPM configuration](#))
- When creating a BI report subscription, it is necessary to set an appropriate subscription type.

Starting BPM processes from the level of BI

It is possible to run BPM processes from the level of the list of items and customers/vendors in BI reports. To do so, it is necessary to add the following contexts in the process:

- Items in BI Reports
- Customers/Vendors in BI Reports

More information regarding contexts can be found in article [ERP Context](#).

Basic elements of Visual Basic .NET syntax

When creating BPM processes, it is possible to use VB language syntax. For instance, initial values can be assigned to parameters in such way or operations on numbers or texts inside processes can be performed.

Operators

Visual Basic supports the following types of operators:

Operation Name	VB.NET	C#	T-SQL
A less than B	<code>A < B</code>	<code>A < B</code>	<code>A < B</code>
A less than or equal to B	<code>A <= B</code>	<code>A <= B</code>	<code>A <= B</code>
A equal to B	<code>A = B</code>	<code>A == B</code>	<code>A = B</code>
A greater than B	<code>A > B</code>	<code>A > B</code>	<code>A > B</code>
A greater or equal to B	<code>A >= B</code>	<code>A >= B</code>	<code>A >= B</code>
A different from B	<code>A <> B</code>	<code>A != B</code>	<code>A <> B</code>
A or B	<code>A OrElse B</code>	<code>A B</code>	<code>A OR B</code>
A and B	<code>A AndAlso B</code>	<code>A & & B</code>	<code>A AND B</code>
Assigning decimal value 10,1 to A	<code>A = 10.1D</code>	<code>A = 10.1m</code>	<code>A = 10.1</code>
Assigning floating-point value 10,1 to A	<code>A = 10.1R</code>	<code>A = 10.1</code>	<code>A = 10.1</code>
Negation of A	<code>Not A</code>	<code>!A</code>	-
Combining strings	<code>"a" & b.ToString()</code>	<code>"a" + b.ToString()</code>	<code>'a' + b</code>
The first element of T table	<code>T(0)</code>	<code>T [0]</code>	-
Creating an object of nullable integer type	<code>New Nullable(Of Int32)</code>	<code>New Nullable()</code>	-

Operation Name	VB.NET	C#	T-SQL
Invoking a method with SalesInvoice generic type	ObjectFactory.Create(Of SalesInvoice)()	ObjectFactory.Create()	-
Converting an object object into type Type	DirectCast(object, Type) CType(object, Type)	(Type)Object	-
Null value	Nothing	null	NULL
A is not a null	A IsNot Nothing	A !=null	A IS NOT NULL
A is a null	A is Nothing	A == M	
A is of Type type	TypeOF A Is Type	A Is Type	-
Creating a directory of String types key and Decimal values and initiating it with "KOS" key of value 2.0D	New Dictionary(Of String, Decimal)() From {"KOS", 2.0D}}	new Dictionary() {"KOS", 2.0m}}	-
Creating an object of DocumentEventParams type and initiating its property DocumentId with value 169	New DocumentEventParams() With {.DocumentId = 169}	new DocumentEventParams() {DocumentId = 169}	-
Assigning a text value: Text to variable A	A ="Text"	A ="Text"	SET @A = 'Text'
Assigning a text value in inverted commas: "Text" to variable A	A =""Text""	A =\"Text\""	SET @A = 'Text''

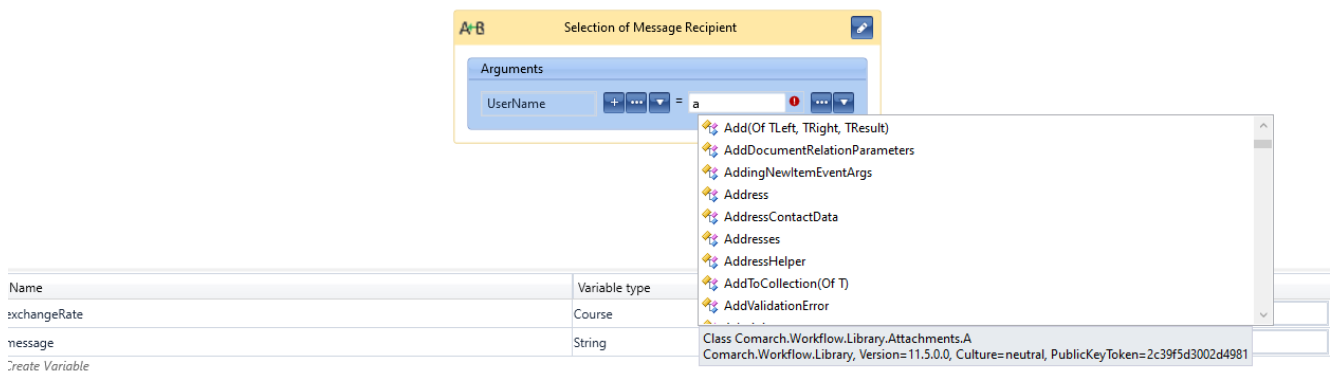
Operation Name	VB.NET	C#	T-SQL
Using a conditional operator to assign a text value to a variable of string type A on the basis of the value B (if B equals to Nothing, A will equal to String.Empty, otherwise, A will equal to B)	A = If(B Is Nothing, String.Empty, B)	A = B == null ? String.Empty : B	-
Creating an anonymous method	IEnumerable.Find(Function(c) c.Code.Equals("PL"))	IEnumerable.Find(c => c.Code == "PL")	

Note

It is necessary to remember about correct types when comparing. For example, expression "73" < "9" returns *True*, because the first character in the first expression is classified higher than in the other one. If first characters are equal, then the next character from both expressions is compared, etc.

Intellisense mechanism

Comarch ERP Standard BPM has its own Intellisense mechanism. Intellisense is a form of automatic completion. At the same time, it is designed for documenting and disambiguating names of variables, functions and methods. Using the mechanism is a convenient way to get access to descriptions of functions, and partially to the list of their parameters.



Intellisense mechanism

Standard processes

Installation of Comarch ERP Standard BPM gives the user the possibility of accessing standard processes. The processes represent examples of activities usage and help to handle the most common business scenarios. They can be added to the library with the use of the *<<mechanism importing processes>>*. Files of standard processes can be found in the main installation directory of the Comarch ERP Standard application, in *BPMPProcesses* folder.

Detailed description of all current standard processes is located, by default, in the installation directory of Comarch ERP Standard, in *BPMPProcesses|Documentation* folder. The documentation can be also opened from the level of *Process Editor*.

Note

A modified standard process can be saved as user's process

only. It is not possible to save changes in a standard process.

Below, there is a list of available standard processes:

- **Update Supervisor (Customer) on Contact Person Forms** – it allows for replacing an inactive supervisor (customer) with a new one on the forms of contact persons
- **Update Supervisor (Employee) on Customer Forms** – it allows for replacing an inactive supervisor (employee) with a new one on the forms of customers/vendors
- **Update Supervisor (Employee) on Contact Person Forms** – it allows for deactivating and adding a supervisor on contact person forms
- **Update Attribute On Customer Form Upon Sales Complaint (SCL) Confirmation** – this process updates the attribute on the customer form during the confirmation of a sales complaint (SCL) document
- **Update Items Delivery Date On The Basis of BI Report** – this process updates time of items delivery in currently valid price lists
- **Update Exchange Rates** – this process updates exchange rates for the exchange rate type indicated in *ExchangeRateName* parameter
- **Update Thresholds (minimum quantity and optimal quantity)** – this process updates thresholds: minimum quantity and optimal quantity for items from a specific groups, on the basis of the following documents: SI, R, SOR, IR- and their corrections, in accordance with a given warehouse and for a given period.
- **Analyze Item Sales** – this process informs the user who initiates the process about exceeding the threshold value
- **Cancel Intercompany Warehouse Movement Processed in POS** – this process is used for canceling all documents created within an intercompany warehouse movement

processed in *Comarch Retail POS*

- **Handle Automatically Intra-Community Transaction** –this process automatizes the process of handling intercompany transactions.
- **Handle Automatically EU Transactions in VAT Accounts** – process for VAT invoices and VAT invoice corrections with *Intercompany* transaction type, automatically generates VAT documents that respectively present output and input VAT tax on VAT-7 tax return
- **Handle Automatically Transaction with Reverse Charge** – this process automatizes the process of handling transactions subject to reverse charge. The process is started at the moment of confirming or canceling a purchase invoice with at least one item subject to reverse charge.
- **Handle Automatically Transaction with Reverse Charge in VAT Accounts** – process for VAT invoices and VAT invoice corrections with *National* transaction type, automatically generates VAT documents that respectively present output and input VAT tax on VAT-7 tax return
- **Invoice Automatically SO Release Documents (SOR)** – default configuration of the process handles invoicing on monthly basis for all customers. For each release a separate sales invoice with *Unconfirmed* status is generated
- **Post documents automatically** – this process enables automatic posting of confirmed documents in accordance with values set in the process parameters
- **Restock Shortages Automatically** – the process automates generation of warehouse documents to sales invoices and receipts in which shortages have been registered.
- **Complete Analytical Description in Documents Automatically** –this process enables automatic completion of analytical description for documents in accordance with values set in the process parameters
- – This process verifies the VAT tax status retrieved from the customer form on documents FZ, FZL

(sprzedawcy); FS, FSL (nabywcy)

- **Add Customer-Vendor Default Name (local)** – this local process aims to add new customer through the possibility of entering default customer name, code, TIN number and description
- **Add Supervisor (Customer-Vendor Type) for Selected Customers-Vendors** – this process allows for adding supervisors to selected customers in batch
- **Unprintable Invoices for Natural Persons in JPK_V7M** – This process automatizes the process of handling invoices for natural persons not subject to printing on fiscal printer
- **Printable Invoices in JPK_V7M** – This process automatizes the process of handling fiscal invoices in JPK_V7M file
- **Generate Opposite Documents for Operations Executed Between Companies within One Structure** – this process is responsible for creating opposite documents in case of registering in case a transaction between companies within the same multicompany structure is registered in the system.
- **Generate PDF for Sales Invoice (SI)** – This process generates a printout in .pdf format for a sales invoice accepted by the user
- **Information on the processing of sales orders through trade documents issued in the offline mode in Retail POS** – This process is started automatically at the moment of registering in the system documents SI/R issued in Comarch Retail POS that were not synchronized previously because of the lack of connection with the workstation. This process creates associations between SI/R documents issued on the workstation with S0 documents and sends the information regarding the association to a selected operator group.
- **Inform About Customers With Exceeded Credit Limit** – this process sends to the mailboc of the employee who started the process a statement of customers who exceeded credit limit

- **Inform About Payment Delays On The Basis of BI Report** – this process sends an e-mail message with a statement of customers who have unpaid payments above a specific number of days
- **Calculate Price for Basic Unit on the Basis of Additional Unit's Price** – this process completes the functionality of price lists for secondary additional lists in the system. It is used in a situation when, in the system, prices are entered in an additional unit, while transactions for an item are performed both in the additional unit and in the basic unit.
- **Control Minimum Margin On Sales Invoice (SI) Items (A)** – this process is responsible for controlling the minimum margin with the possibility of confirming a document on which the margin level is not reached
- **Control Minimum Margin On Sales Invoice (SI) Items (B)** – this process allows for confirming a document that does not reach the minimum margin and its confirmation is blocked by the *Control Minimum Margin On Sales Invoice (SI) Items (A)* process – a document from this process is submitted to authorized operators for confirmation
- **Control Uniqueness of Customer-Vendor TIN Numbers** – this process enables control of the uniqueness of customer forms in regard to the TIN number within the whole database
- **Control Uniqueness of Document Reference Number** – within the process, when saving PO, PI, SOR, DM documents and their corrections and when confirming PO, PI, VPI, SOR documents and their corrections, the system verifies the uniqueness of the reference number for the documents of a given type
- **Copy Attribute From Customer Form To Sales Complaint (SCL)** – this process compares the value of an attribute (according to the name of the attribute class defined in the parameter) on the customer form and in the SCL document header when changing the claimant on the SCL document
- **Handle Discrepancies in Delivery** – this process supports

the functionality of registering discrepancies in deliveries of items moved between the headquarters and a subsidiary or between subsidiaries

- **Notify About Cash Register Discrepancy**– this process informs selected operator group that, when opening cash register turn on a POS workstation, a discrepancy between the actual cash register balance and the cash register balance registered in the system occurred
- **Inform About Sales Complaint (SCL) Item Status Change** – this process allows for sending automatic notifications (e-mail messages) to clients, regarding sales complaint item status change
- **Notify About Tasks** – with the use of this process, an employee with an assigned task, receives a notification regarding this event
- **Notify About Arrears – Dunning Letters (DL), Notify About Arrears – Late Fees (LF), Notify About Arrears – Payment Reminders (PR)** – these processes enable an ongoing verification of delayed payments for the whole organization or for a selected center (if selected center is not of a company type, the process refers to the first parent center of company type for the center indicated in the process) for all or selected customers, according to the parameters specified in the process definition
- **Associate SCL With Sales Documents (R, SI)** – this process allows for creating associations between confirmed sales complaint documents (SCL) and sales documents (R, SI)
- **Submit SO to Another Center** – this process allows for submitting (copying) a sales order document (SO) to another center
- **Generate a Series of Contacts for Selected Customers** – process used for creating contacts in batch
- **Generate a Series of Meetings for Selected Customers** – process used for creating meetings in batch
- **Generate a Series of Questionnaires for Top Vendors on**

the Basis of BI Report – process used for creating in batch questionnaires for top vendors on the basis of a selected BI report

- **Create Purchase Orders (PO) With the Use of Item Quantity Calculation (IQC)** – this process allows for creating item quantity calculation (IQC) on the basis of which purchase orders (PO) are generated and saved as unconfirmed
- **Subscribe BI Report Part 1 of 2** – processes *Subscribe BI report* allow for sending defined subscriptions of BI report to the task inboxes of employees selected as report recipients
- **Subscribe BI Report Part 2 of 2** – this process is responsible for sending the subscription defined in the process *Subscribe BI Report Part 1 of 2* in accordance with the schedule defined in the report subscription
- **Verify Bank Account For Selected Customers/Vendors** – this process is used for checking bank accounts of customers who fulfill specific requirements and belong to the group from the level of which the process was started. Then, it sends a message to the operator's inbox.
- **Verify VAT Status For Selected Customers-Vendors** – this process is used for verifying VAT status for selected customers
- **Verification of Customer/Vendor VAT Status When Saving or Confirming a Document** – this process checks customer VAT status on PI, API (vendor) and SI, ASI (customer) documents
- **Inform About Unconsidered Sales Complaints (SCL)** – this process informs the user who initiated it about unconsidered sales complaints (SCL)
- **Inform About Acceptance of Sales Complaint (SCL)** – this process is started when changing the status on the header of an SCL document and verifies whether its status is changed to IF yes, the information regarding the acceptance is sent to operators indicated in the

process parameter

- **Send Formatted E-mail** – this process sends an e-mail message with a specific content and subject to the recipients indicated in the process
- **Display Message About Customer Submitting Complaint SCL** – this process displays message informing about setting the customer on a SCL document
- **Block Customer-Vendor Addition (local)** – this process block addition of a new customer with default code and TIN number
- **Block Confirmation of Purchase Order (PO) With High Value (local)** – local process that block the possibility of confirming purchase orders with high values (by default, it is value 1000 in the document currency) by users who do not belong to a selected group (*B2_admin, by default*)
- **Change Customer Type in CRM** – this process is triggered after confirming a sales quote (SQ) or a sales order (SO)
- **Find All Documents To Post** – this process creates a list of documents that are supposed to be posted and checks whether the document type has a posting scheme associated
- **Process Intercompany Delivery** – this process is used for issuing POR documents in case of registering in the system, with the use of a SOR document, a delivery between companies within the same multi-company structure
- **Process Intercompany Warehouse Movement** – this process is used for processing deliveries or returns in case of registering in the system, with the use of a WM-document, a warehouse movement within the same multicompany structure
- **Add Customer-Vendor Default Name (local)** – this local process aims to add new customer through the possibility of entering default customer name, code, TIN number and description

- **Add Supervisor (Customer-Vendor Type) for Selected Customers-Vendors** – this process allows for adding supervisors to selected customers in batch
- **Analyze Item Sales** – this process informs the user who initiates the process about exceeding the threshold value
- **Associate SCL With Sales Documents (R, SI)** – this process allows for creating associations between confirmed sales complaint documents (SCL) and sales documents (R, SI)
- **Block Confirmation of Purchase Order (PO) With High Value (local)** – local process that block the possibility of confirming purchase orders with high values (by default, it is value 1000 in the document currency) by users who do not belong to a selected group (*B2_admin, by default*)
- **Block Customer-Vendor Addition (local)** – this process block addition of a new customer with default code and TIN number
- **Block Saving or Confirmation of Document Issued for Customer/Vendor Not Marked As Active Taxpayer** – This process verifies the VAT tax status retrieved from the customer form on PI, API (vendor), SI, ASI (customer) documents
- **Calculate Price for Basic Unit on the Basis of Additional Unit's Price** – this process completes the functionality of price lists for secondary additional lists in the system. It is used in a situation when, in the system, prices are entered in an additional unit, while transactions for an item are performed both in the additional unit and in the basic unit.
- **Cancel Intercompany Warehouse Movement Processed in POS** – this process is used for canceling all documents created within an intercompany warehouse movement processed in *Comarch Retail POS*
- **Change Customer Type in CRM** – this process is triggered after confirming a sales quote (SQ) or a sales order

(S0)

- **Complete Analytical Description in Documents Automatically** –this process enables automatic completion of analytical description for documents in accordance with values set in the process parameters
- **Control Minimum Margin On Sales Invoice (SI) Items (A)** – this process is responsible for controlling the minimum margin with the possibility of confirming a document on which the margin level is not reached
- **Control Minimum Margin On Sales Invoice (SI) Items (B)** – this process allows for confirming a document that does not reach the minimum margin and its confirmation is blocked by the *Control Minimum Margin On Sales Invoice (SI) Items (A)* process – a document from this process is submitted to authorized operators for confirmation
- **Control Uniqueness of Customer-Vendor TIN Numbers** – this process enables control of the uniqueness of customer forms in regard to the TIN number within the whole database
- **Control Uniqueness of Document Reference Number** – within the process, when saving PO, PI, SOR, DM documents and their corrections and when confirming PO, PI, VPI, SOR documents and their corrections, the system verifies the uniqueness of the reference number for the documents of a given type
- **Copy Attribute From Customer Form To Sales Complaint (SCL)** – this process compares the value of an attribute (according the name of the attribute class defined in the parameter) on the customer form and in the SCL document header when changing the claimant on the SCL document
- **Create Purchase Orders (PO) With the Use of Item Quantity Calculation (IQC)** – this process allows for creating item quantity calculation (IQC) on the basis of which purchase orders (PO) are generated and saved as unconfirmed
- **Display Message About Customer Submitting Complaint SCL**

- this process displays message informing about setting the customer on a SCL document
- **Find All Documents To Post** – this process creates a list of documents that are supposed to be posted and checks whether the document type has a posting scheme associated
- **Generate a Series of Contacts for Selected Customers** – process used for creating contacts in batch
- **Generate a Series of Meetings for Selected Customers** – process used for creating meetings in batch
- **Generate a Series of Questionnaires for Top Vendors on the Basis of BI Report** – process used for creating in batch questionnaires for top vendors on the basis of a selected BI report
- **Generate Opposite Documents for Operations Executed Between Companies within One Structure** – this process is responsible for creating opposite documents in case of registering in case a transaction between companies within the same multicompany structure is registered in the system.
- **Generate PDF for Sales Invoice (SI)** – This process generates a printout in .pdf format for a sales invoice accepted by the user
- **Handle Automatically EU Transactions in VAT Accounts** – process for VAT invoices and VAT invoice corrections with *Intercompany* transaction type, automatically generates VAT documents that respectively present output and input VAT tax on VAT-7 tax return
- **Handle Automatically Intra-Community Transaction** –this process automatizes the process of handling intercompany transactions.
- **Handle Automatically Transaction with Reverse Charge** – this process automatizes the process of handling transactions subject to reverse charge. The process is started at the moment of confirming or canceling a purchase invoice with at least one item subject to reverse charge.

- **Handle Automatically Transaction with Reverse Charge in VAT Accounts** – process for VAT invoices and VAT invoice corrections with *National* transaction type, automatically generates VAT documents that respectively present output and input VAT tax on VAT-7 tax return
- **Handle Discrepancies in Delivery** – this process supports the functionality of registering discrepancies in deliveries of items moved between the headquarters and a subsidiary or between subsidiaries
- **Inform About Acceptance of Sales Complaint (SCL)** – this process is started when changing the status on the header of an SCL document and verifies whether its status is changed to IF yes, the information regarding the acceptance is sent to operators indicated in the process parameter
- **Inform About Customers With Exceeded Credit Limit** – this process sends to the mailbox of the employee who started the process a statement of customers who exceeded credit limit
- **Inform About Payment Delays On The Basis of BI Report** – this process sends an e-mail message with a statement of customers who have unpaid payments above a specific number of days
- **Inform About Sales Complaint (SCL) Item Status Change** – this process allows for sending automatic notifications (e-mail messages) to clients, regarding sales complaint item status change
- **Inform About Unconsidered Sales Complaints (SCL)** – this process informs the user who initiated it about unconsidered sales complaints (SCL)
- **Information on the processing of sales orders through trade documents issued in the offline mode in Retail POS** – This process is started automatically at the moment of registering in the system documents SI/R issued in Comarch Retail POS that were not synchronized previously because of the lack of connection with the workstation. This process creates associations between SI/R documents

issued on the workstation with S0 documents and sends the information regarding the association to a selected operator group.

- **Invoice Automatically S0 Release Documents (SOR)** – default configuration of the process handles invoicing on monthly basis for all customers. For each release a separate sales invoice with *Unconfirmed* status is generated
- **Notify About Arrears – Dunning Letters (DL), Notify About Arrears – Late Fees (LF), Notify About Arrears – Payment Reminders (PR)** – these processes enable an on-going verification of delayed payments for the whole organization or for a selected center (if selected center is not of a company type, the process refers to the first parent center of company type for the center indicated in the process) for all or selected customers, according to the parameters specified in the process definition
- **Notify About Cash Register Discrepancy**– this process informs selected operator group that, when opening cash register turn on a POS workstation, a discrepancy between the actual cash register balance and the cash register balance registered in the system occurred
- **Notify About Tasks** – with the use of this process, an employee with an assigned task, receives a notification regarding this event
- **Post documents automatically** – this process enables automatic posting of confirmed documents in accordance with values set in the process parameters
- **Printable Invoices in JPK_V7M** – This process automatizes the process of handling fiscal invoices in JPK_V7M file
- **Process Intercompany Delivery** – this process is used for issuing POR documents in case of registering in the system, with the use of a SOR document, a delivery between companies within the same multi-company structure
- **Process Intercompany Warehouse Movement** – this process

is used for processing deliveries or returns in case of registering in the system, with the use of a WM-document, a warehouse movement within the same multicompany structure

- **Restock Shortages Automatically** – the process automates generation of warehouse documents to sales invoices and receipts in which shortages have been registered.
- **Send Formatted E-mail** – this process sends an e-mail message with a specific content and subject to the recipients indicated in the process
- **Submit SO to Another Center** – this process allows for submitting (copying) a sales order document (SO) to another center
- **Subscribe BI Report Part 1 of 2** – processes *Subscribe BI report* allow for sending defined subscriptions of BI report to the task inboxes of employees selected as report recipients
- **Subscribe BI Report Part 2 of 2** – this process is responsible for sending the subscription defined in the process *Subscribe BI Report Part 1 of 2* in accordance with the schedule defined in the report subscription
- **Unprintable Invoices for Natural Persons in JPK_V7M** – This process automatizes the process of handling invoices for natural persons not subject to printing on fiscal printer
- **Update Attribute On Customer Form Upon Sales Complaint (SCL) Confirmation** – this process updates the attribute on the customer form during the confirmation of a sales complaint (SCL) document
- **Update Exchange Rates** – this process updates exchange rates for the exchange rate type indicated in *ExchangeRateName* parameter
- **Update Items Delivery Date On The Basis of BI Report** – this process updates time of items delivery in currently valid price lists
- **Update Supervisor (Customer) on Contact Person Forms** – it allows for replacing an inactive supervisor

(customer) with a new one on the forms of contact persons

- **Update Supervisor (Employee) on Contact Person Forms** – it allows for deactivating and adding a supervisor on contact person forms
- **Update Supervisor (Employee) on Customer Forms** – it allows for replacing an inactive supervisor (employee) with a new one on the forms of customers/vendors
- **Update Thresholds (minimum quantity and optimal quantity)** – this process updates thresholds: minimum quantity and optimal quantity for items from a specific group, on the basis of the following documents: SI, R, SOR, IR- and their corrections, in accordance with a given warehouse and for a given period.
- **Verification of Customer/Vendor VAT Status When Saving or Confirming a Document** – this process checks customer VAT status on PI, API (vendor) and SI, ASI (customer) documents
- **Verify Bank Account For Selected Customers/Vendors** – this process is used for checking bank accounts of customers who fulfil specific requirements and belong to the group from the level of which the process was started. Then, it sends a message to the operator's inbox.
- **Verify VAT Status For Selected Customers-Vendors** –this process is used for verifying VAT status for selected customers