

Update, Delete, Close Process for selection

Client Recruiter Job Person Resume Process

Process (10) [Add New Process](#) [Customize View](#)

Matching(2) Job Sent(5) Recommend(1) 1st Interview

Men Tanaka/Sample Client 01

- Detail
- Edit**
- Copy
- Delete**
- Document
- Send Email
- Email History
- Email to Recruiter
- Email to Person
- Open in listview
- Edit Job
- Detail Job

Men Tanaka/Sample Client 01

Process	Job Sent	Client	Sample Client 01
Process Date	2015/07/20 14:52:00	Job	Sample Job 03
Process Memo		Resume	Meg Tanaka(10009)
End Flag			
End Reason			
Estimated Sales			
Expected Closing Date			
Process Owner	N/A Stacie		

Hanako Yamada/Sample Client 01

Process	Job Sent	Client	Sample Client 01
Process Date	2014/06/20 14:52:00	Job	Sample Job 03
Process Memo		Resume	Hanako Yamada(10003)
End Flag			
End Reason			
Estimated Sales			
Expected Closing Date			
Process Owner	N/A Catherine Porters		

Meg Tanaka/Sample Client 01

Process	Job Sent	Client	Sample Client 01
Process Date	2014/10/29 11:41:00	Job	Sample Job 01
Process Memo		Resume	Hanako Yamada(10003)
End Flag			
End Reason			
Estimated Sales			
Expected Closing Date			
Process Owner	N/A Catherine Porters		

Meg Tanaka/Sample Client 01

Process	Job Sent	Client	Sample Client 01
Process Date	2014/12/09 11:42:00	Job	Sample Job 04
Process Memo		Resume	Meg Tanaka(10009)
End Flag	Close		
End Reason	Client NG		
Estimated Sales			

Mail

Search

※ There is a possibility that the screen image might change.
 ※ In this manual, the default menus displayed are the default settings.
 To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

Display the Process you wish to update in the list view, click the title. Then click "Edit" in the Action Menu

If you want to delete the data, click "Delete", then click "Yes" in the confirmation dialog box.
 ※ Please note that deleted data can never be recovered.

※ There is a possibility that the screen image might change.
 ※ In this manual, the default menus displayed are the default settings.
 To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

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Catherine Porters Apps ?

Client Recruiter Job Person

Process (10)

Matching(2) Job Sent(5) Recomme

Meg Tanaka/Sample Client

Hanako Yamada/Sample Cli

Hanako Yamada/Sample Cli

Meg Tanaka/Sample Client

Anne Takahashi/Sample Cli

Process - Edit

required web document
Close

Basic Information

Process ID	10019		Client	Sample Client 01
Process(Current)	1st Interview		Recruiter	Sample Recruiter 01
Process Date(Current)	2015/07/27	11:55 NOW	Job	Sample Job 03
Process Memo(Current)				
End Flag	<input type="checkbox"/> Close			
End Reason	<input type="checkbox"/> Success <input type="checkbox"/> Client NG <input type="checkbox"/> Person NG <input type="checkbox"/> Job Consultant NG <input type="checkbox"/> Person Consultant NG			
Estimated Sales	<input type="text"/>			
Expected Closing Date	<input type="text"/> NOW			
Process Owner	N/A Stacie			

Contact Information

Telephone (Recruiter)	00-0000-0000	Telephone (Person)	03-0000-0009
Fax (Recruiter)	00-0000-0000	Fax (Person)	
E-mail (Recruiter)	sample@porters.jp	E-mail (Person)	e1@porters.jp
Mobile Number (Recruiter)	090-0000-0000	Mobile Number (Person)	080-0000-0001
Mobile E-mail (Recruiter)	sample@porters.jp	Mobile E-mail (Person)	keitai@porters.jp

System Information

Date Created	2015/07/23 11:55:03	Date Updated	2015/07/31 15:15:44
Registered	N/A Stacie	Updated by	N/A Catherine Porters

Customize View

Click "Save" after inputting "Process (Current)", "Process Date (Current)" and Process Date (Current)".

[Send notification email](#)

Save

Cancel

Process (10) Add New Process Bulk Action

Matching(2) Job Sent(5) Recommend(0) 1st Interview(2) 2nd Interview(0) Decision(1) Offer(0)

Meg Tanaka/Sample Client 01	
Process	1st Interview
Process Date	2015/07/27 11:55:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie

Hanako Yamada/Sample Client 01	
Process	Job Sent
Process Date	2014/06/20 14:52:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Catherine Porters

Hanako Yamada/Sample Client 01	
Process	Job Sent
Process Date	2014/10/29 11:41:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	

Meg Tanaka/Sample Client 01	
Process	1st Interview
Process Date	2015/07/27 11:55:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie

Anne Takahashi/Sample Client 01	
Process	Job Sent
Process Date	2014/12/09 11:29:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie

The modifications are reflected in Process list and Sublist.

The latest process is one having the green flag on it's left side.

Process | Meg Tanaka/Sample Client 01 (10019) | (0) Print View

Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job

Detail Job

Basic Information

Process ID	10019	Client	Sample Client 01
Process (Current)	1st Interview	Recruiter	Sample Recruiter 01
Process Date (Current)	2015/07/27 11:55:00	Job	Sample Job 03
Process Memo (Current)		Job Owner	Catherine Porters
		Resume	Meg Tanaka(10009)
		Resume Owner	Catherine Porters

Telephone (Recruiter) 00-0000-0000 **Telephone (Person)** 03-0000-0009

Fax (Recruiter) 00-0000-0000 **Fax (Person)**

E-mail (Recruiter) sample@porters.jp **E-mail (Person)** e1@porters.jp

Mobile Number (Recruiter) 090-0000-0000 **Mobile Number (Person)** 080-0000-0001

Mobile E-mail (Recruiter) sample@porters.jp **Mobile E-mail (Person)** keitai@porters.jp

System Information

Date Created	2015/07/23 11:55:03	Date Updated	2015/07/31 15:18:55
Registered by	N/A Stacie	Updated by	N/A Catherine Porters

Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job

Detail Job

Sublist | Process History Add New

	Date	Phase	Memo	Updated By	Date Updated
<input checked="" type="checkbox"/>	2015/07/27 11:55:00	1st Interview		N/A Catherine Porters	2015/07/31 15:18:55
<input type="checkbox"/>	2015/07/25 11:55:00	Recommend		N/A Catherine Porters	2015/07/31 15:15:44
<input type="checkbox"/>	2015/07/23 11:55:00	Job Sent		N/A Stacie	2015/07/23 11:56:09
<input type="checkbox"/>	2015/07/23 11:54:00	Job Sent		N/A Stacie	2015/07/23 11:55:03

Sublist | Sales Add New Sales List

	Sales ID	Client Name	Position	Resume Title	Sales Amount	Record Date	Joining Date	Date Updated
<input type="checkbox"/>	10002	Sample Client 01	Sample Job 01	Sample Person 02(10002)	1,500,000	2014/06/16	2014/05/16	2014/05/19 16:19:28
<input type="checkbox"/>	10006	Sample Client 01	Sample Job 01	Sample Person 02(10002)	2,000,000	2014/06/16	2014/05/16	2014/05/19 16:19:11

Process (10) Add New Process Bulk Action Customize View

Matching(2) Job Sent(5) Recommend(1) 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0)

- Meg Tanaka/Sample Client 01
 - Detail
 - Edit**
 - Copy
 - Delete
 - Document
 - Send Email
 - Email History
 - Email to Recruiter
 - Email to Person
 - Open in listview
 - Edit Job
 - Detail Job

Display the Process data you wish to edit.
Then click "Edit" in the action menu.

Client	Sample Client 01
Job	Sample Job 03
Resume	Meg Tanaka(10009)
Process	Job Sent
Process Date	2014/06/20 14:52:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie
Client	Sample Client 01
Job	Sample Job 03
Resume	Hanako Yamada(10003)
Process	Job Sent
Process Date	2014/10/29 11:41:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Catherine Porters
Client	Sample Client 01
Job	Sample Job 04
Resume	Meg Tanaka(10009)
Process	Job Sent
Process Date	2014/12/09 11:42:00
Process Memo	
End Flag	Close
End Reason	Client NG
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie
Client	Sample Client 01
Job	Sample Job 03
Resume	Meg Tanaka(10009)
Process	Job Sent
Process Date	2014/12/09 11:42:00
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Catherine Porters

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Client Recruiter Job Person

Process (10)

Matching(2) Job Sent(5) Recomm

Meg Tanaka/Sample Client

Hanako Yamada/Sample Client

Hanako Yamada/Sample Client

Meg Tanaka/Sample Client

Anne Takahashi/Sample Client

Process - Edit

Basic Information

Process ID: 10019

Process(Current): Recommend

Process Date(Current): 2015/07/28 11:55 NOW

Process Memo(Current):

End Flag: Close

End Reason: Success Client NG Person NG
 Job Consultant NG
 Person Consultant NG

Estimated Sales:

Expected Closing Date:

Process Owner: N/A Stacie

Contact Information

Telephone (Recruiter): 00-0000-0000

Fax (Recruiter): 00-0000-0000

E-mail (Recruiter): sample@porters.jp

Mobile Number (Recruiter): 090-0000-0000

Mobile E-mail (Recruiter): sample@porters.jp

System Information

Date Created: 2015/07/23 11:55:03

Registered by: N/A Stacie

Date Updated: 2015/07/31 15:46:49

Updated by: N/A Catherine Porters

Send notification email

Save Cancel

To Close a process, check "Close" of the End Flag.

It is recommended not to change the layout and options of "End Reason" and "End Flag" for general purpose.

To customize the layout and options, please refer to the "Customize" manual. To End Flag is not for successful candidates. Please use "Join" option in that case.

Please check the suitable End Reason.

This example shows that the application is rejected because of the client failed it at the recommendation phase.

※"Process(current) will not be updated."

Click "Save" after editing.

Process (10)

Add New Process

Bulk Action

[Customize View](#)

Matching(2) Job Sent(5) Recommend(1) 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0)

Process	Process Date	Process Memo	End Flag	End Reason	Estimated Sales	Expected Closing Date	Process Owner	Client	Job	Resume
<input type="checkbox"/> Meg Tanaka/Sample Client 01										
Process	2015/07/28 11:55:00			Client NG			N/A Stacie			
Process	2014/06/20 14:52:00						N/A Catherine Porters	Sample Client 01	Sample Job 03	Hanako Yamada(10003)
Process	2014/10/29 11:41:00						N/A Catherine Porters	Sample Client 01	Sample Job 01	Hanako Yamada(10003)
Process	2014/12/09 11:42:00		Close	Client NG			N/A Stacie	Sample Client 01	Sample Job 04	Meg Tanaka(10009)
<input type="checkbox"/> Anne Takahashi/Sample Client 01										
Process								Sample Client 01		

Process	Recommend
Process Date	2015/07/28 11:55:00
Process Memo	
End Flag	
End Reason	Client NG
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie

End Reason is added to the corresponding data. In this example, we learn that the Client failed the application at the recommendation phase and the fact that the candidate is yet to be contacted as the "Close" of the End Flag is not checked.

Mail
 Search

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Client Recruiter Job Person

Process (10)

Matching(2) Job Sent(5) Recomm

Meg Tanaka/Sample Client

Hanako Yamada/Sample Client

Hanako Yamada/Sample Client

Meg Tanaka/Sample Client

Anne Takahashi/Sample Client

Process - Edit

required web document

Client: Sample Client 01

Process ID: 10019

Process(Current): Recommend

Process Date(Current): 2015/07/28 11:55

Process Memo(Current):

End Flag: Close

End Reason: Success Client NG Person NG
 Job Consultant NG
 Person Consultant NG

Resume Owner: N/A Catherine Porters

Estimated Sales:

Expected Closing Date: NOW

Process Owner: N/A Stacie

Contact Information

Telephone (Recruiter)	00-0000-0000	Telephone (Person)	03-0000-0009
Fax (Recruiter)	00-0000-0000	Fax (Person)	
E-mail (Recruiter)	sample@porters.jp	E-mail (Person)	e1@porters.jp
Mobile Number (Recruiter)	090-0000-0000	Mobile Number (Person)	080-0000-0001
Mobile E-mail (Recruiter)	sample@porters.jp	Mobile E-mail (Person)	keitai@porters.jp

System Information

Date Created	2015/07/23 11:55:03	Date Updated	2015/07/31 15:48:22
Registered by	N/A Stacie	Updated by	N/A Catherine Porters

Send notification email

Save Cancel

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Customize View

Check the End Flag's "Close" checkbox after contacting the candidate.

Click "Save" after editing.

Process (10) Add New Process Bulk Action Customize View

Matching(2)
 Job Sent(5)
 Recommend(1)
 1st Interview(1)
 2nd Interview(0)
 Decision(1)
 Offer(0)

<input type="checkbox"/> Meg Tanaka/Sample Client 01	Process	Recommend	Client	Sample Client 01
	Process Date	2015/07/28 11:55:00	Job	Sample Job 03
	Process Memo		Resume	Meg Tanaka(10009)
	End Flag	Close		
	End Reason	Client NG		
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Stacie		
<input type="checkbox"/> Hanako Yamada/Sample Client 01	Process	Job Sent	Client	Sample Client 01
	Process Date	2014/06/20 14:52:00	Job	Sample Job 03
	Process Memo		Resume	Hanako Yamada(10003)
	End Flag			
	End Reason			
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Catherine Porters		
<input type="checkbox"/> Hanako Yamada/Sample Client 01	Process	Job Sent	Client	Sample Client 01
	Process Date	2014/10/29 11:41:00	Job	Sample Job 01
	Process Memo		Resume	Hanako Yamada(10003)
	End Flag			
	End Reason			
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Catherine Porters		
<input type="checkbox"/> Meg Tanaka/Sample Client 01	Process	Job Sent	Client	Sample Client 01
	Process Date	2014/12/09 11:42:00	Job	Sample Job 04
	Process Memo		Resume	Meg Tanaka(10009)
	End Flag	Close		
	End Reason	Client NG		
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Stacie		
<input type="checkbox"/> Anne Takahashi/Sample Client 01	Process	Job Sent	Client	Sample Client 01
	Process Date	2014/12/09 11:42:00	Job	Sample Job 04
	Process Memo		Resume	Anne Takahashi(10009)
	End Flag			
	End Reason			
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Stacie		

This process is completed because the End Flag is "Close".

Mail

Search

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Client Recruiter Job Person Resum

Process

Customize View

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Mail

Search

Process Search Criteria

Saved Search -

Sort Order Updated Date(Desc)

Keyword Contains All (AND)

Keyword Search Mode All Attachment Data

Process ID

Process Contains Any (OR)
 Matching Job Sent Recommend 1st Interview
 Decision Offer

Process Date -

End Flag Does not contain
 Close

End Reason Contains Any (OR)
 Success Client NG Person NG Job Cunsultant NG
 Person Consultant NG

Process Owner

Client ID Text
Contains All (AND)

Recruiter ID Text
Contains All (AND)

Job ID Text
Contains All (AND)

Job Owner

Resume ID Text
Contains All (AND)

Resume Owner

Date Created -

Date Updated -

Person ID Text
Contains All (AND)

[New Saved Search](#)
[Delete Saved Search](#)
[Sort Order for Saved Searches](#)

Search

Cancel

To close a process, check the "Close" of the End Flag.
It is recommended to set "exclude closed process" in the custom search conditions for handy searching of active processes.

✂ Please refer to "How to Save Custom Search Conditions" manual: for details.

Process (10)

[Add New Process](#)

[Bulk Action](#) 

[Customize View](#)

Matching(2) Job Sent(5) Recommend(1) 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0)

Meg Tanaka/Sample Client 01		Client	Sample Client 01
Process	Recommend	Job	Sample Job 03
Process Date	2014/10/29 11:41:00	Resume	Meg Tanaka(10009)
Process Memo			
End Flag			
End Reason			
Estimated Sales			
Expected Closing Date			
Process Owner	N/A Catherine Porters		
Hanako Yamada/Sample Client 01		Client	Sample Client 01
Process	Job Sent	Job	Sample Job 03
Process Date	2014/10/29 11:41:00	Resume	Hanako Yamada(10003)
Process Memo			
End Flag			
End Reason			
Estimated Sales			
Expected Closing Date			
Process Owner	N/A Catherine Porters		
Meg Tanaka/Sample Client 01		Client	Sample Client 01
Process	Job Sent	Job	Sample Job 04
Process Date	2014/12/09 11:42:00	Resume	Meg Tanaka(10009)
Process Memo			
End Flag	Close		
End Reason	Client NG		
Estimated Sales			
Expected Closing Date			
Process Owner	N/A Stacie		
Anne Takahashi/Sample Client 01		Client	Sample Client 01
Process	Job Sent		

- Detail
- Edit
- Copy
- Delete
- Document
- Send Email
- Email History
- Email to Recruiter
- Email to Person
- Open in listview
- Edit Job
- Detail Job

Display the Process you wish to delete in the list view, click the title.
Then click "Delete" in the Action Menu

✂ This is for deleting the process itself. For deleting part of the process history, please refer to p.13.

 Mail

 Search

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Client Recruiter Job Person Resume Process Sales Activity

Process (10) Add New Process Bulk Action Customize View

Matching(2) Job Sent(5) Recommend(1) 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0)

<input type="checkbox"/> <u>Meg Tanaka/Sample Client 01</u>	Process	Recommend	Client	Sample Client 01
	Process Date	2015/07/28 11:55:00	Job	Sample Job 03
	Process Memo		Resume	Meg Tanaka(10009)
	End Flag	Close		
	End Reason	Client NG		
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Stacie		
<input type="checkbox"/> <u>Hanako Yamada/Sample Client 01</u>	Process	Job Sent	Client	Sample Client 01
	Process Date	2014/06/20 14:52:00	Job	Sample Job 03
	Process Memo		Resume	Hanako Yamada(10003)
	End Flag			
	End Reason			
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Catherine Porters		
<input type="checkbox"/> <u>Hanako Yamada/Sample Client 01</u>	Process	Job Sent	Client	Sample Client 01
	Process Date	2014/10/29 11:41:00	Job	Sample Job 01
	Process Memo		Resume	Hanako Yamada(10003)
	End Flag			
	End Reason			
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Catherine Porters		
<input type="checkbox"/> <u>Meg Tanaka/Sample Client 01</u>	Process	Job Sent	Client	Sample Client 01
	Process Date	2014/12/09 11:42:00	Job	Sample Job 04
	Process Memo		Resume	Meg Tanaka(10009)
	End Flag	Close		
	End Reason	Client NG		
	Estimated Sales			
	Expected Closing Date			
	Process Owner	N/A Stacie		
<input type="checkbox"/> <u>Anne Takahashi/Sample Client 01</u>	Process	Job Sent	Client	Sample Client 01

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Are you sure you want to delete this?

Click "Yes" in the confirmation dialog.
The process will be deleted.
⚠Caution: Delete operation can't be undone.

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Client Recruiter Job Person Resume Process Sales Activity

Process (10) Add New Process Bulk Action

Matching(2) Job Sent(5) Recommend(1) 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0)

Meg Tanaka/Sample Client 01

Process	Recommend
Process Date	2015/07/28 11:55:00
Process Memo	
End Flag	Close
End Reason	Client NG
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie

Hanako Yamada/Sample Client 01

Process	Job Sent
Process Date	2014/06/20 14:52:00
Process Memo	
End Flag	
End Reason	

Anne Takahashi/Sample Client 01

Process	Job Sent
Process Date	
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A Stacie

Process | Meg Tanaka/Sample Client 01 (10019) (0) Print View

Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job

Detail Job

Basic Information

Process ID	10019	Client	Sample Client 01
Process (Current)	Recommend	Recruiter	Sample Recruiter 01
Process Date (Current)	2015/07/28 11:55:00	Job	Sample Job 03
Process Memo (Current)		Job Owner	Catherine Porters
End Flag	Close	Resume	Meg Tanaka(10009)
End Reason	Client NG	Resume Owner	Catherine Porters
Estimated Sales			
Expected Closing Date			
Process Owner	N/A Stacie		

Contact Information

Telephone (Recruiter)	00-0000-0000	Telephone (Person)	03-0000-0009
Fax (Recruiter)	00-0000-0000	Fax (Person)	
E-mail (Recruiter)	sample@porters.jp	E-mail (Person)	e1@porters.jp
Mobile Number (Recruiter)	090-0000-0000	Mobile Number (Person)	080-0000-0001
Mobile E-mail (Recruiter)	sample@porters.jp	Mobile E-mail (Person)	keitai@porters.jp

System Information

Date Created	2015/07/23 11:55:03	Date Updated	2015/07/31 15:48:41
Registered by	N/A Stacie	Updated by	N/A Catherine Porters

Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job

Detail Job

Sublist | Process History Add New

	Date	Phase	Memo	Updated By	Date Updated
<input type="checkbox"/>	2015/07/28 11:55:00	Recommend		N/A Catherine Porters	2015/07/31 15:48:41
<input type="checkbox"/>	2015/07/23 11:55:00	Job Sent		N/A Stacie	2015/07/23 11:56:09
<input type="checkbox"/>	:00	Job Sent		N/A Stacie	2015/07/23 11:55:03

Edit Delete

Sales List

	Sales ID	Client Name	Position	Resume Title	Sales Amount	Record Date	Joining Date	Date Updated
<input type="checkbox"/>	10002	Sample Client 01	Sample Job 01	Sample Person 02(10002)	1,500,000	2014/06/16	2014/05/16	2014/05/19 16:19:28
<input type="checkbox"/>	10006	Sample Client 01	Sample Job 01	Sample Person 02(10002)	2,000,000	2014/06/16	2014/05/16	2014/05/19 16:19:11
<input type="checkbox"/>	10008	Sample Client 01	Sample Job 01	Sample Person 02(10002)	1,200,000	2014/07/16	2014/05/16	2014/05/19 16:18:49

From process history, the sublist will be displayed when clicking the process title.

To delete an entry of in the process history, click the action button of that entry and choose Delete.

✘This operation is for deleting entries of process history. To delete the process itself, please refer to p.11.

✘If Phase Flow Control is effective, the entries in the phase history can not be deleted.

