ProcessMagnet

GUIDE

Your first Magnet view in 5 steps

From choosing systems to the first audit-ready process note — how a Magnet start works in practice.

1. Clarify the trigger

Compliance deadline, scaling, tool consolidation or AI foundation — the trigger decides which process should become visible first.

2. Define the sources

You decide which systems Magnet connects to: email, ticket, CRM, ERP, files, calls. What, how deep and with which permissions — your IT goes through that with us before anything runs.

3. Let it connect

Magnet accesses only what you grant, under control, and pulls no shadow copy of your systems. You keep working as before.

4. Condense & review

A structured process note emerges from the raw material: steps, owners, decisions. Your team reviews and approves.

5. Live on in Collector

The approved note moves into ProcessCollector and lives on there as a shared view — visible to every team.