Add a Create Object Action to a Transition

Last Modified on 12/11/2024 4:17 pm EST

Overview

The **Create Object** action automatically creates a new relationship or reference object and moves the originating object to the next state once the associated trigger is clicked on a form. When adding the **Create Object** action to a transition, note that:

- Only the **Button** trigger type can be selected with this action.
- This action cannot be added to a transition on the Creation state.
- All fields in the new object will be blank, with the exception of Name/Description or plain text field concatenations that may have been configured for the new object.
- If the relationship or reference object type has required fields or the user doesn't have the proper permissions to create the object, the transition will fail.

> ***Warning:***
> The **Create Object** action should not be used to create objects in bulk.

User Account Requirements

The user must have Administrator permissions to access the ***Admin Overview*** screen.

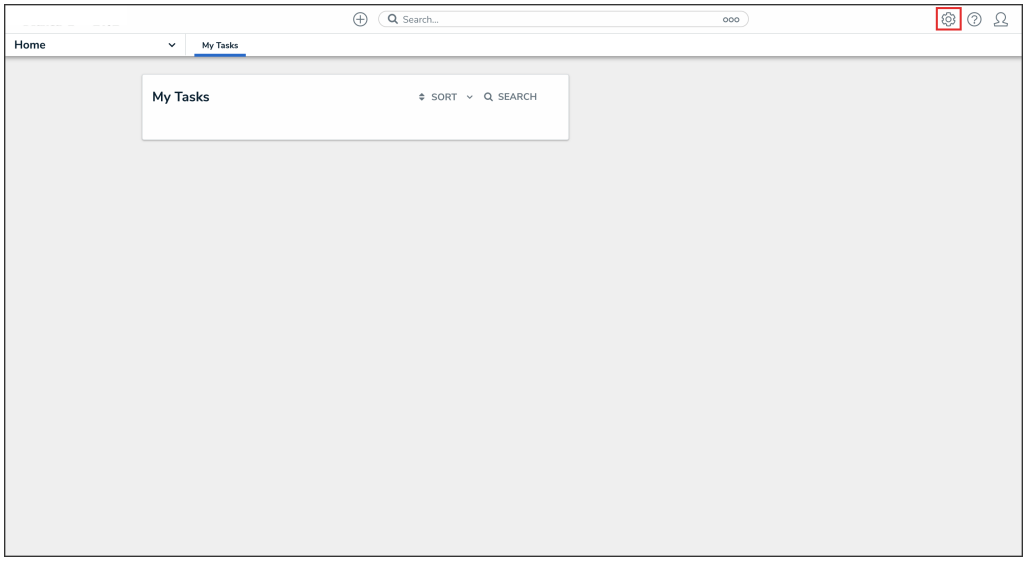
Required Information/Setup

Please refer to the Add a Trigger & Transition to a State article for instructions on how to add triggers and transitions.

Please refer to the Roles and Workflow Permissions sections for more information on configuring roles and workflow permissions.

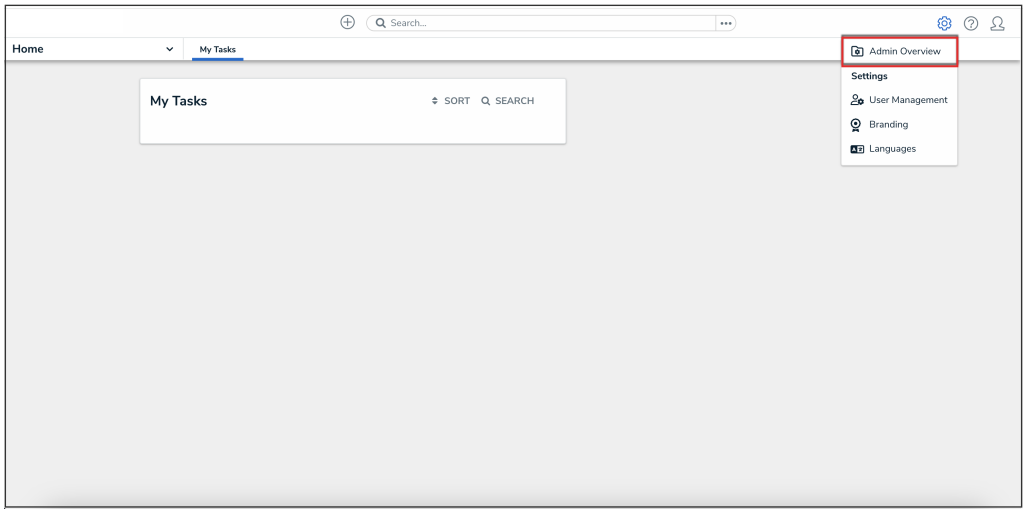
Navigation

1. From the ***Home*** screen, click the **Administration** icon.



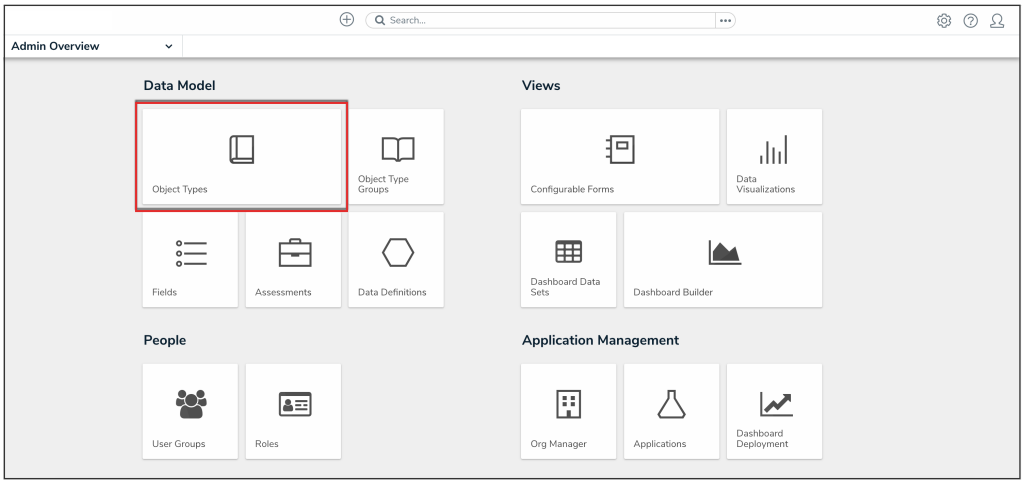
Administration Icon

2. From the **Administrator Settings** menu, click **Admin Overview**.



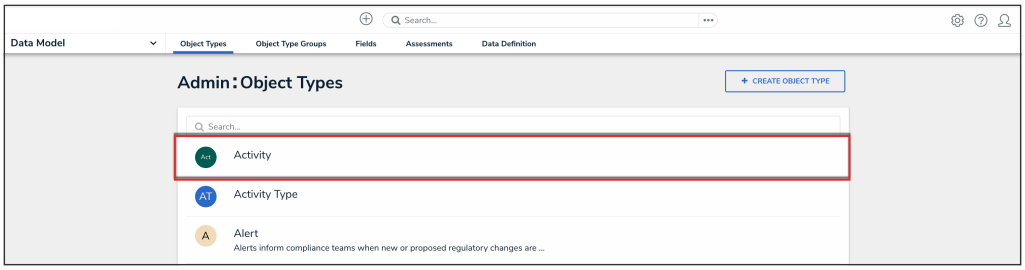
Administrator Settings Menu

3. From the ***Admin Overview*** screen, click the **Object Types** tile under the **Data Model** section.



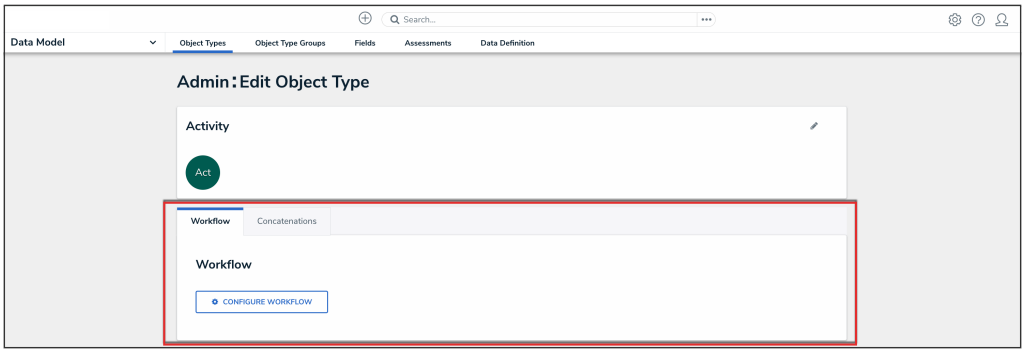
Object Types Tile

4. From the ***Object Types*** screen, enter an object type name in the **Search** field to narrow down the object types list.
5. Click the **Object Type** name you want to edit.



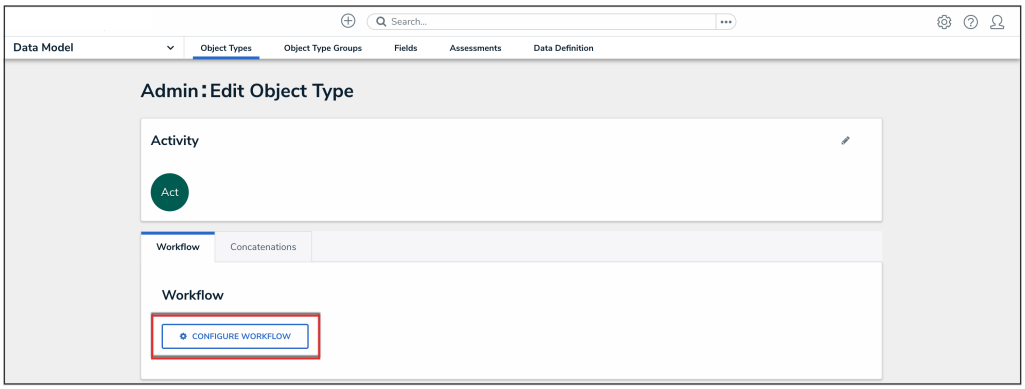
Object Type Name

6. From the ***Edit Object Type*** screen, click a workflow under the **Workflow** tab.



Workflow Tab

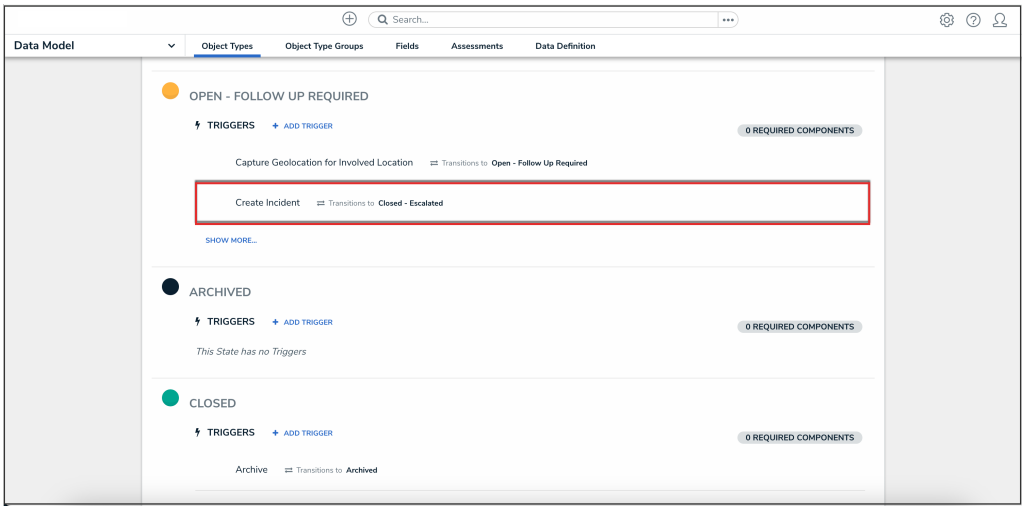
7. If there are no workflows listed, click the **Configure Workflow** button.



Configure Workflow Button

Add a Create Object Action to a Transition

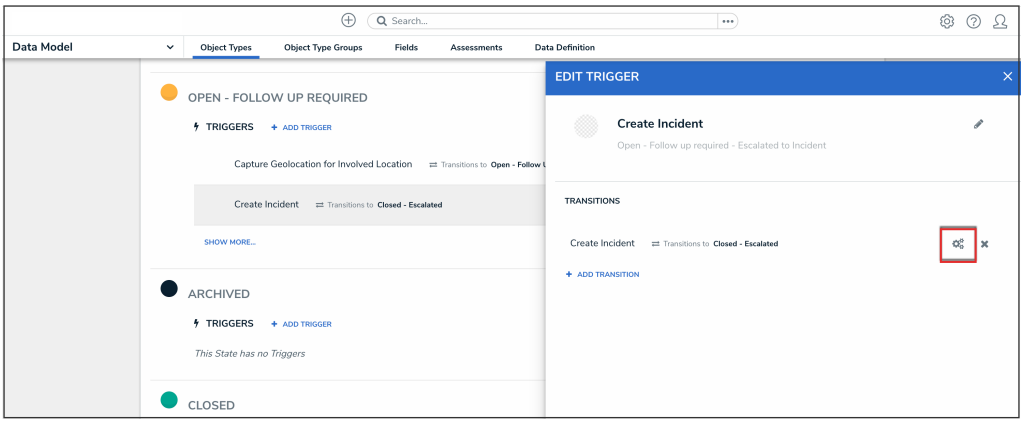
1. From the ***Edit Workflow*** screen, click the trigger that you want to add the Create Object action to.



Workflow Trigger

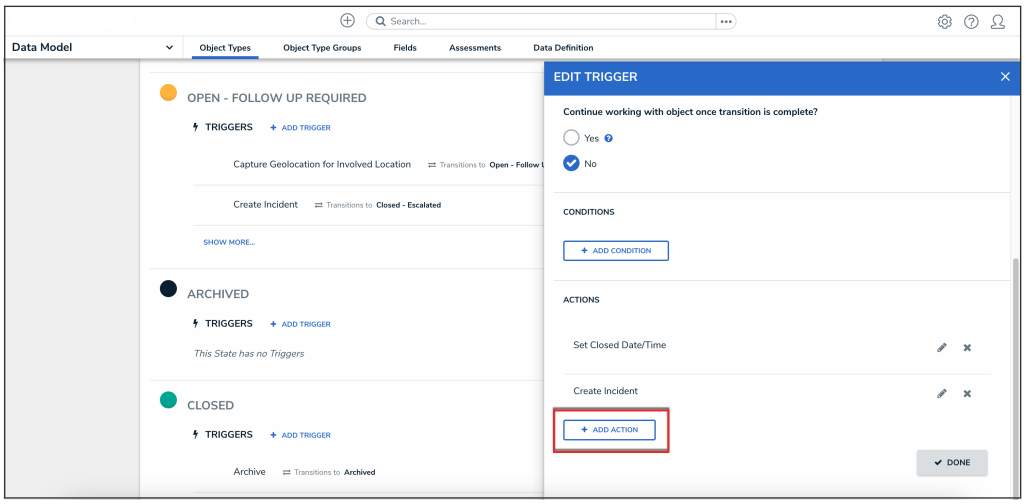
> ***Note:***
> This action cannot be added to the **Creation** state.

2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.



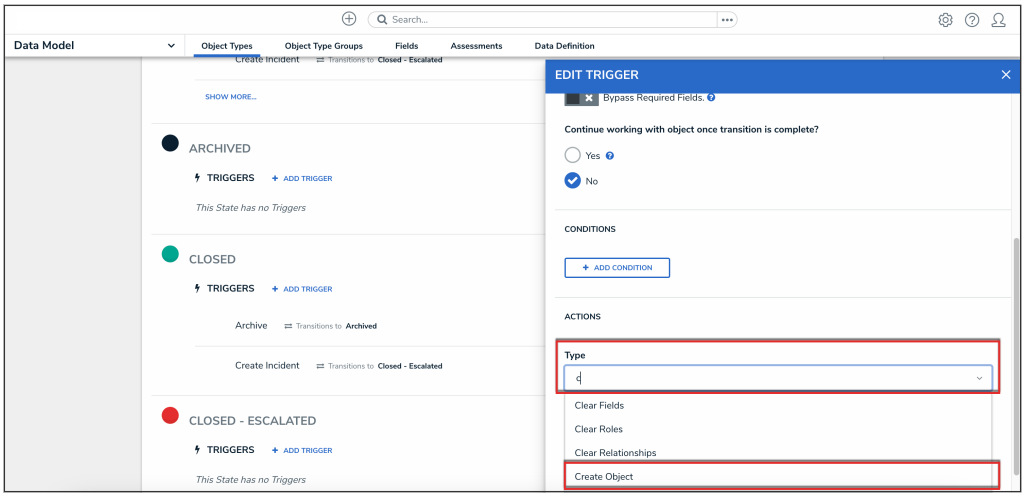
Configure Icon

3. Click the **Add Action** button in the **Actions** section.



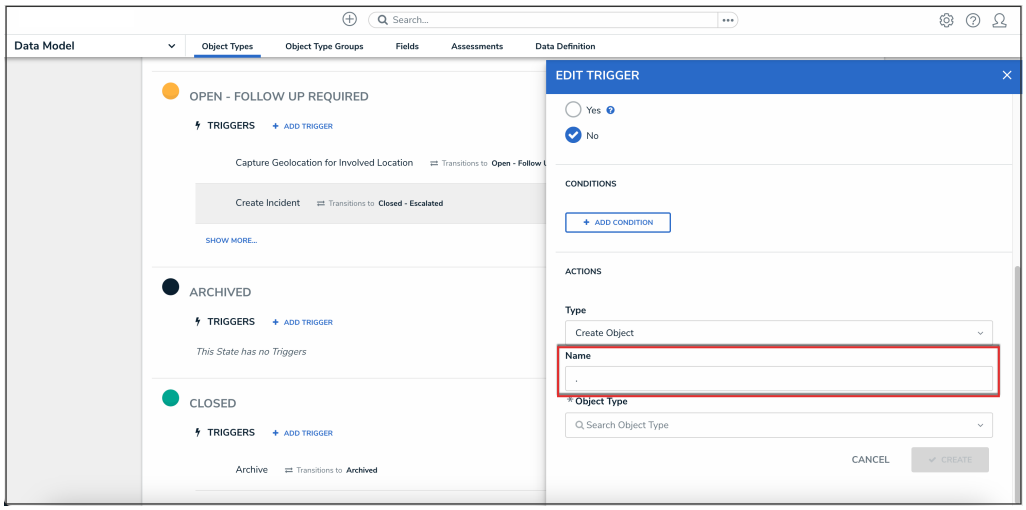
Add Action Button

4. Select **Create Object** from the **Type** dropdown menu.



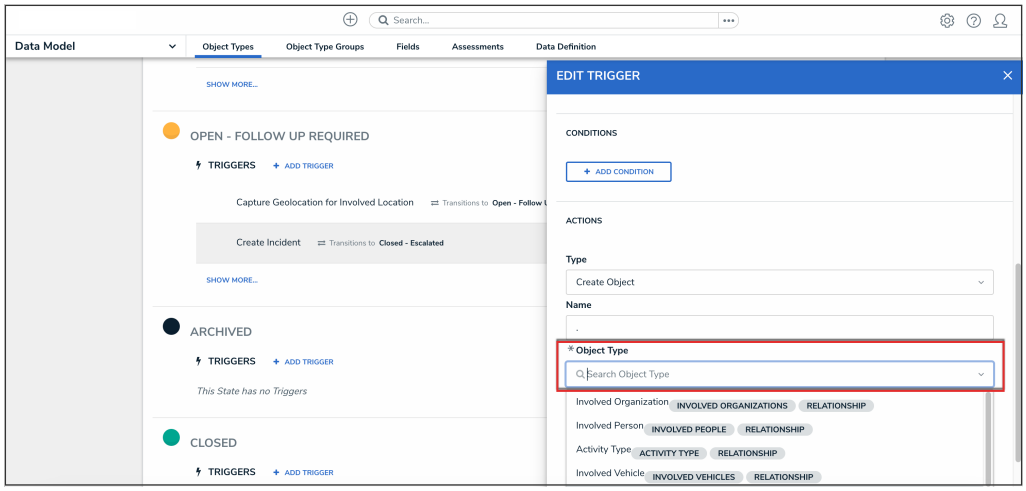
Type Dropdown

5. Enter a name for the action in the **Name** field.



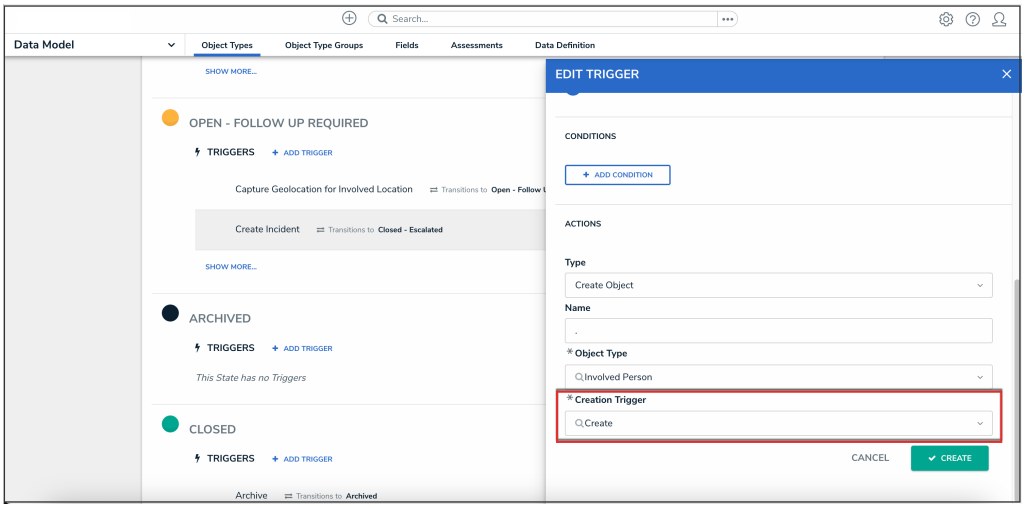
Name Field

6. Select the object type you wish to create the object for from the **Object Type** dropdown menu. Object types are identified by their names on the left and relationship or reference name on the right.



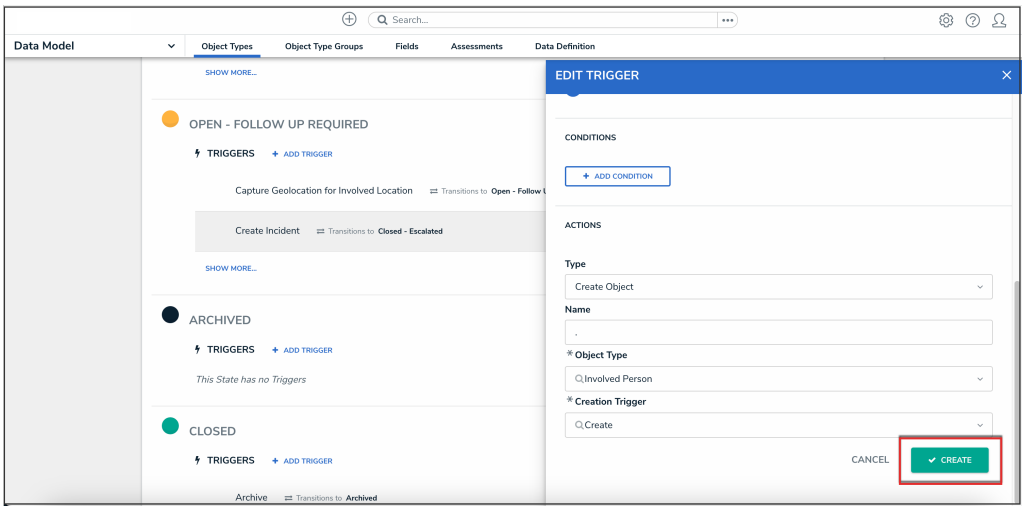
Object Type Dropdown

7. Select a creation trigger from the **Creation Trigger** dropdown menu.



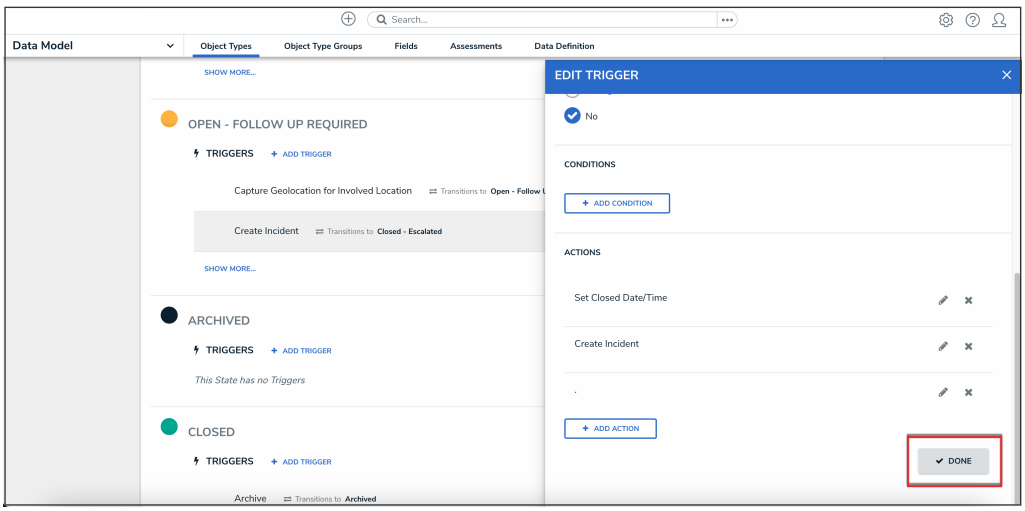
Creation Trigger Dropdown

8. Click the **Create** button.



Create Button

9. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.



Done Button