

Add a Pull Data Values Action to a Transition

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The **Pull Data Values** action automatically copies values from fields, the **Location** property, and/or relationships and inserts them into the current object as it moves to the next state in the workflow. For example, if you needed to create an incident object from an activity, this action would automate the process by copying over important field, location, and relationship information.

Important Notes

- Copying field values requires that those fields are added to both object types as components. See [Add Fields to an Object Type](#) for more information.
- With the exception of **Locations**, object type properties, **Attachments**, and **Image Attachments** are not supported on this action.
- To copy location information, both the parent and child object types must have the **Location** element added to a standard form.
- Objects that have inherited location information from another object through this action will appear on any [relationship maps](#) for the object types.
- It's strongly recommended that relationships that connect to a maximum of one object are selected in this action. For example, if the Activity object is related to several Person objects through the Person of Interest relationship, the Person of Interest relationship shouldn't be selected for the action. However, if each of those Person objects are related to a single Location object through the Primary Residence relationship, the Primary Residence relationship would be ideal for the action.
- If a relationship that connects to more than one object is selected for the action, data values are pulled from the most recently created object.
- To copy relationships, both the parent and child object types must have relationships with the same name that connect to the same object type group. For example, if both the Incident (child) and Activity (parent) object types have a Person of Interest relationship to the Person object type, that relationship on Activity could be selected in the action. Additionally, both relationships must have the same **MaximumAllowedEdges** settings (i.e., both relationships have the same maximum number of objects they can connect to). If these settings don't match on a relationship, it will not appear as an option when creating the action.



Instructions

To add a Pull Data Values action to a transition:



1. From the **Edit Workflow** page, add a button [trigger and transition](#) to the appropriate state or click a trigger to open the **Edit Trigger** palette.

2. Click the  icon next to the transition.

EDIT TRIGGER

 **Create from Activity** 



TRANSITIONS

Triage ⇄ Transitions to Triage  

[+ ADD TRANSITION](#)


3. Click Add Action in the Actions section.



EDIT TRIGGER

 **Create from Activity** 

TRANSITION DETAILS

Name

Destination State
 Triage 

 Bypass Required Fields. 

CONDITIONS

[+ ADD CONDITION](#)

ACTIONS

[+ ADD ACTION](#)

4. Select **Pull Data Values** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Select an object type from the **Object Type** dropdown menu. Object types are identified by their names to the left and their relationship or reference name to the right. In order for object types to appear in this dropdown menu, they must meet certain criteria. See the **Important Notes** section of this article for more information.

The screenshot shows a form titled "ACTIONS" with the following fields:

- Type:** A dropdown menu with "Pull Data Values" selected.
- Name:** A text input field containing "Pull activity data".
- Object Type:** A dropdown menu with "Incident Type" selected. Below it, a table shows the relationship details for "Incident Type":

Object Type	Relationship
Incident Type	PRIMARY INCIDENT TYPE
Incident Type	RELATIONSHIP

At the bottom of the form are two buttons: "CANCEL" and "CREATE" (with a checkmark icon).

A new Pull Data Values action.

7. Select the **Location** property or one or more fields, relationships, or references to copy from the **Data** dropdown menu.

The screenshot shows the same "ACTIONS" form as above, but with the **Data** dropdown menu expanded. It contains three selected items, each with a close button (x):

- Incident Reported DateTime
- Incident Priority
- Incident Category

The "CREATE" button is now highlighted in green.

Fields selected in the Data dropdown menu.

8. Click **Create**.
9. Ensure the trigger for this action has been added to the appropriate configurable form and

the users who will be clicking the trigger have the appropriate workflow permissions. See the [State Triggers on Forms](#) and [Workflow Permissions](#) articles for more information.