

Add a Pull Data Values Action to a Transition

Last Modified on 05/28/2025 10:42 am EDT

Overview

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.

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.

Important Notes

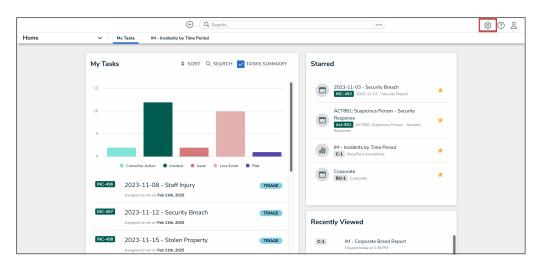
- Copying field values requires that those fields are added to both object types as components. See Add Fields to an Object Type for more information.
- With the exception of Locations, object type properties, attachments, and image attachments are not supported on this action.
- To copy location information, 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.

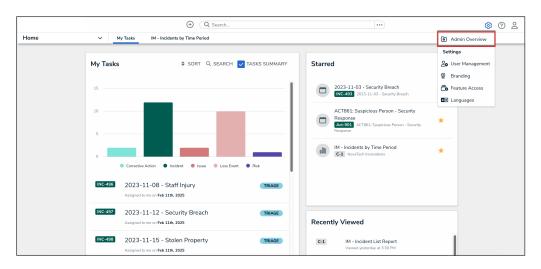
Navigation



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.

Admin Overview 🗸				\$ ® 2
	Data Model		Views	
	Object Types	Object Type Groups	Configurable Forms Data	
	Fields	Data Definitions	Dashboard Data Sets Dashboard Builder	
	Playbooks Automation			
	Data Access		Application Management	
			Dashboard	
	User Groups Roles		Org Manager Applications Deployment	

Object Types Tile

- 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.

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Data Model 🗸 🗸	Object Type	s Object Type Groups	Fields	Assessments	Data Definition			
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	Q Sea	rch						
	Act	Activity						
	AT	Activity Type						
	A	Alert Alerts inform compliance te	ams when ne	w or proposed regul	atory changes are			

Object Type Name

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

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Data Model	✓ Object Ty	pes Object Type Groups	Fields	Assessments	Data Definition			
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	Activ	ity					1	
	Act							
	Work	flow Concatenations						
	Wa	rkflow						
		CONFIGURE WORKFLOW						



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



	⊕ (Q Search	\$ \$ \$
Data Model	Object Types Object Type Groups Fields Assessments Data Definition	
	Admin:Edit Object Type	
	Activity	
	Act	
	Workflow Concatenations	
	Workflow	
	CONFIGURE WORKFLOW	



Add a Pull Data Values Action to a Transition

1. From the *Edit Workflow* screen, click the trigger that you want to add the Pull Data Values action to.

	⊕ Q Search	\$ @ L
Data Model	✓ Object Types Object Type Groups Fields Assessments Data Definition	
	Admin:Edit Workflow	
	Activity	
	States REORDER + ADD STATE	
	CREATION	
	TRIGGERS + ADD TRIGGER GREQUIRED COMPONENTS 0 REQUIRED COMPONENTS	
	Create = Transitions to Open - Follow Up Required	
	Complete = Transitions to Closed	
	SHOW MORE	

Workflow Trigger

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

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	States	5				TRANSITIO	INS		
	CREATION TRIGGERS + ADD THISGER					Create	Transitions to Open - Follow Up Required MISTION	¢\$	×
		Create	≓ Transitions to Open - Fo	llow Up Require	ı				
		Complet	e ≓ Transitions to Closer						
		SHOW MORE							

Configure Icon



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

	⊕ (Q. Search	•••)	\$ @ L				
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition					
	Admin: Edit Workflow	EDIT TRIGGER					
		Name					
	Activity	Create					
		Destination State					
		 Open - Follow Up Required 	~				
	States	× Bypass Required Fields. •					
	CREATION	CONDITIONS					
	TRIGGERS + ADD TRIGGER	+ ADD CONDITION					
	Create 😄 Transitions to Open - Follow Up Required	ACTIONS					
	Complete = Transitions to Closed	Set Activity Owner	/ ×				
	SHOW MORE_	+ ADD ACTION					
	OPEN - FOLLOW UP REQUIRED		✓ DONE				
	TRIGGERS + ADD TRIGGER						

Add Action Button

4. Select **Pull Data Values** from the **Type** drop-down menu.

	(Q Search		\$ @ L			
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition				
	Admin:Edit Workflow		×			
	Activity	CONDITIONS + ADD CONDITION				
	States	ACTIONS				
	CREATION TRIGGERS + ADD TRIGGER	Type Select the type of action				
	Create 🛛 🛱 Transitions to Open - Follow Up Required	Role Management Send Orchestration Event				
	Complete	Clear Fields				
	SHOW MORE	Clear Roles Clear Relationships				
	OPEN - FOLLOW UP REQUIRED	Set Field Value Pull Data Values				

Type Drop-down

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



	(Q Search		\$ ® \$			
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition				
	Admin:Edit Workflow	EDIT TRIGGER	×			
	Activity	CONDITIONS				
		+ ADD CONDITION				
	States	Actions				
	CREATION	Туре	I			
	TRIGGERS + ADD TRIGGER	Pull Data Values	~			
	Create 🛛 🛱 Transitions to Open - Follow Up Required	Name .				
	Complete # Transitions to Closed	Object Type Select one	~			
	SHOW MORE	Data Select one	~			
	OPEN - FOLLOW UP REQUIRED	CAN	CEL V CREATE			
	* TRIGGERS + ADD TRIGGER					

Name Field

6. Select an object type from the **Object Type** drop-down 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.

	(Q Search		\$ 0 L				
Data Model	Object Types Object Type Groups Fields Assessments	Data Definition					
	Admin: Edit Workflow		×				
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		+ ADD CONDITION					
	States	ACTIONS					
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	TRIGGERS + ADD TRIGGER	Pull Data Values Name					
	Create 😄 Transitions to Open - Follow Up Required						
	Complete # Transitions to Closed	Object Type Şelect one	~)				
	SHOW MORE	Activity Type ACTIVITY TYPE RELATIONSHIP Attachment ATTACHMENTS RELATIONSHIP					
	OPEN - FOLLOW UP REQUIRED	Business Unit BUSINESS UNIT RELATIONSHIP Person call taken by Relationship					
		CALL TAKEN BT RELATIONSHIP					

Object Type Drop-down

 Select the Location property or one or more fields, relationships, or reference to copy from the Data drop-down menu.



	⊕ (Q Search		\$ @ L			
Data Model	Object Types Object Type Groups Fields Assessments	Data Definition				
	Admin:Edit Workflow	EDIT TRIGGER	×			
	Activity					
	States	+ ADD CONDITION				
	CREATION	Type Pull Data Values Name . Object Type Activity Type V				
	TRIGGERS + ADD TRIGGER					
	Create = Transitions to Open - Follow Up Required					
	Complete == Transitions to Closed					
	SHOW MORE	Data Şelect one	~ J			
	OPEN - FOLLOW UP REQUIRED	Business Unit RELATIONSHIP Location PROPERTY				

Data Drop-down

- 8. From the **Pull Value variation** drop-down menu, select one of the following:
 - Last created (default): Pulls data in from the last created related data
 - All: Pulls data in from all related data

			•	Q Search					\$ © \$
Data Model	~	Object Types	Object Type Groups	Fields	Assessments	Data Def	inition	Playbook Automation	
	State	5				EDI	T TRIGO	SER	×
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		TRIGGERS	+ ADD TRIGGER				Set Activit	ty Owner	ø ×
		Create	llow Up Require	ł	ту	pe			
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		OPEN - FOLLOW UP REQUIRED					ject Type Activity Ty		~
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		Canture	e Geolocation for Involved	ocation 🕫	Transitions to Open - E		ill Value va	ariation (Relationships)	
		Cupture			o open - r		Last Creat	ed	~
		Create Incident 🛛 🛱 Transitions to Closed - Escalated					All		
		Comple	te	i - Escalated or C	losed - Complete		Last Creat	ed	

Pull Value Variation Drop-down

9. Click the **Create** button.



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Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition
	Admin: Edit Workflow	EDIT TRIGGER ×
	Activity	conditions
	States	+ ADD CONDITION
	States	ACTIONS
	CREATION	Туре
	TRIGGERS + ADD TRIGGER	Pull Data Values ~
	Create Transitions to Open - Follow Up Required	Name .
	Complete == Transitions to Closed	Object Type Activity Type ~
	SHOW MORE	Data Business Unit × v
	OPEN - FOLLOW UP REQUIRED	CANCEL CREATE
	7 TRIGGERS + ADD TRIGGER	

Create Button

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

	(Q Search		\$ 0 L
Data Model	✓ Object Types Object Type Groups Fields Assessments	Data Definition	
Admin:Edit Workflow		EDIT TRIGGER	×
	Activity	Destination State Open - Follow Up Required State Bypass Required Fields.	×
	States	CONDITIONS	
	CREATION TRIGGERS + ADD TRIGGER	+ ADD CONDITION	
	Create III Transitions to Open - Follow Up Required	Set Activity Owner	e ×
	SHOW MORE.		ø ×
	OPEN - FOLLOW UP REQUIRED TRIGGERS + ADD THEGER	+ ADD ACTION	✓ DONE

Done Button