

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.

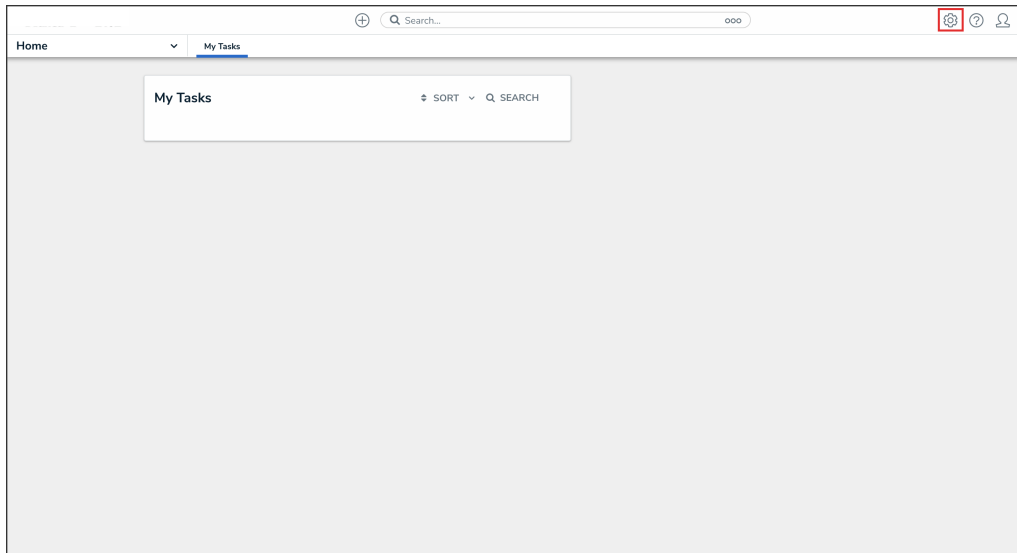
Required Information/Setup

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.

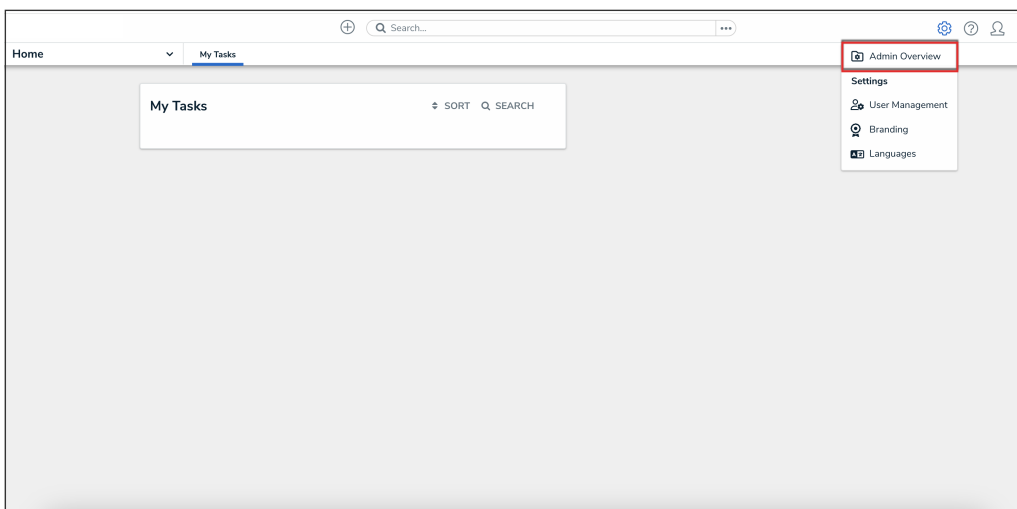
Navigation

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



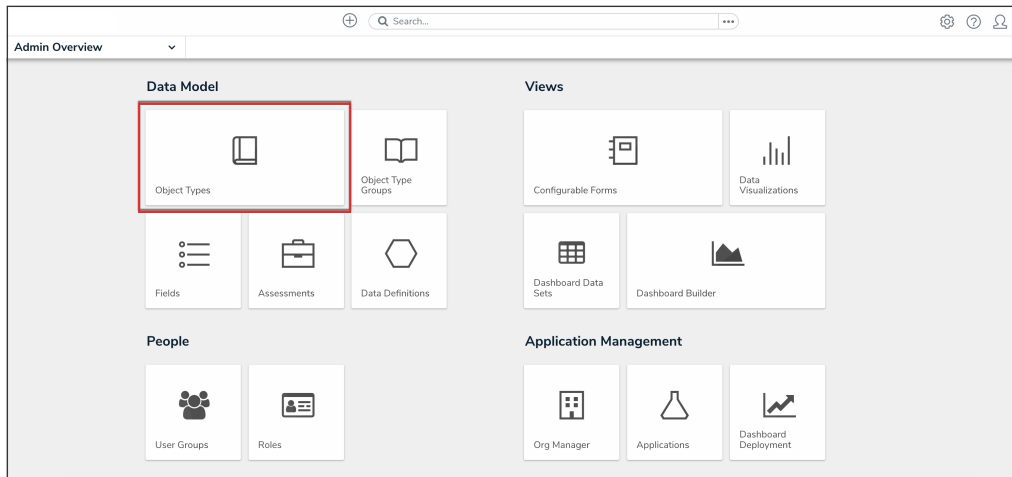
Administration Icon

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



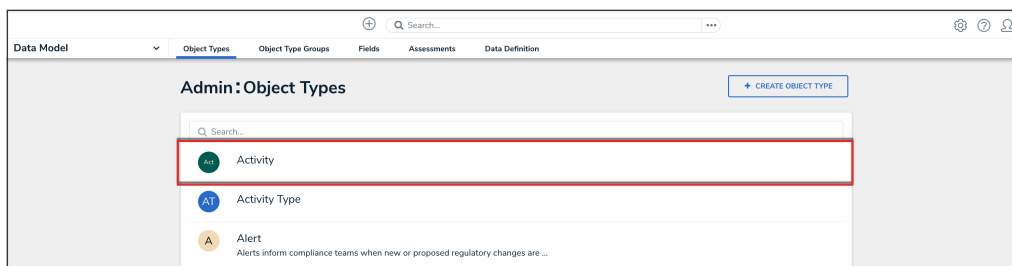
Administrator Settings Menu

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



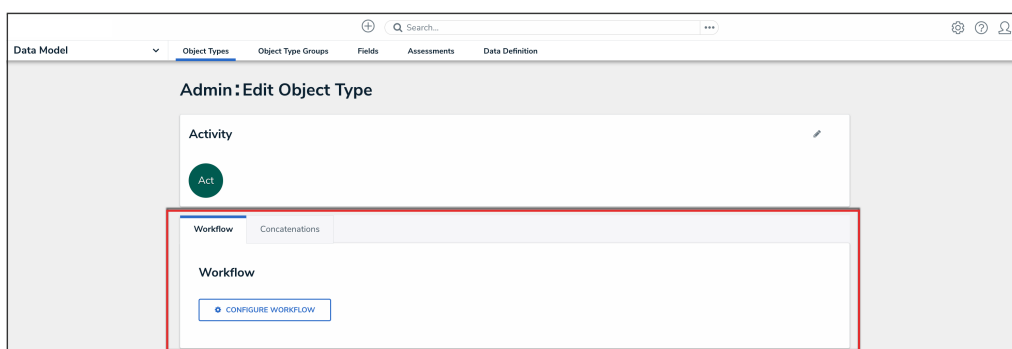
Object Types Tile

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.



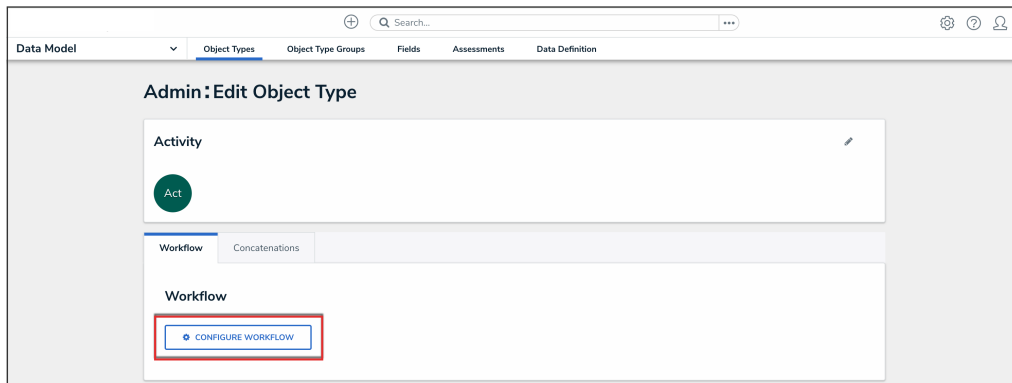
Object Type Name

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



Workflow Tab

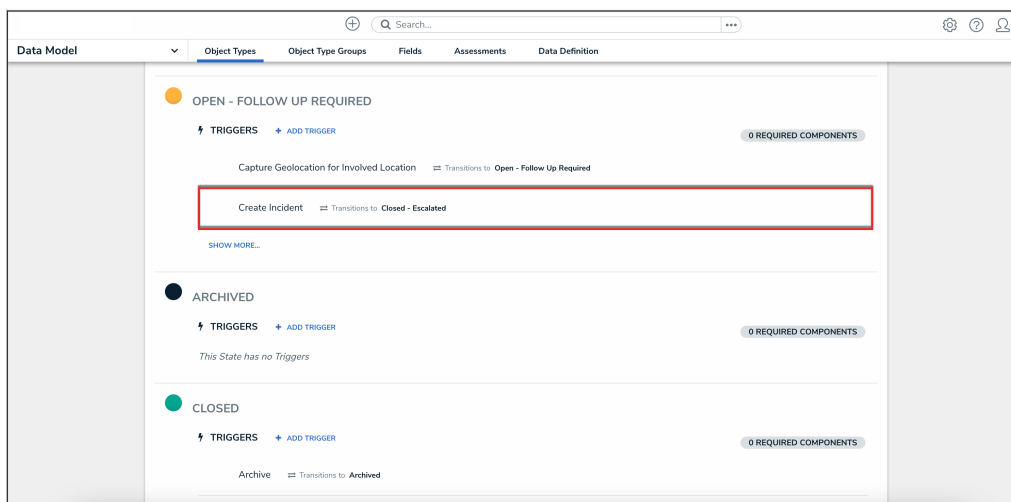
7. If there are no workflows listed, click the **Configure Workflow** button.



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.



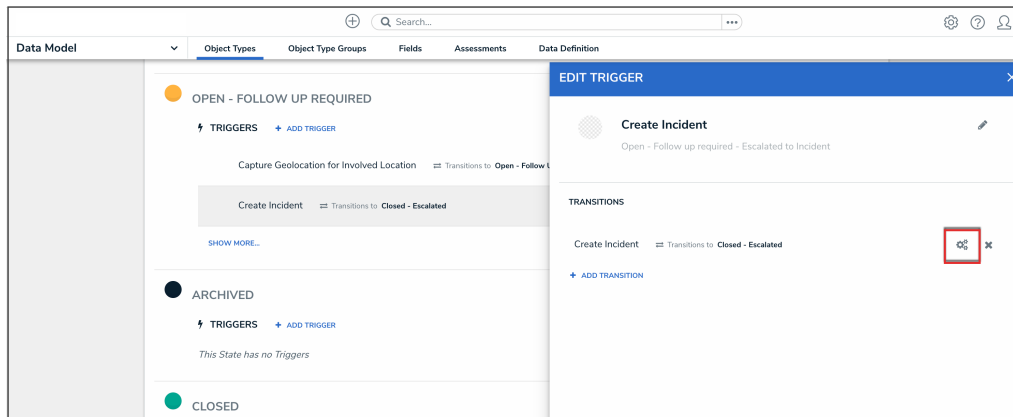
Workflow Trigger



Note:

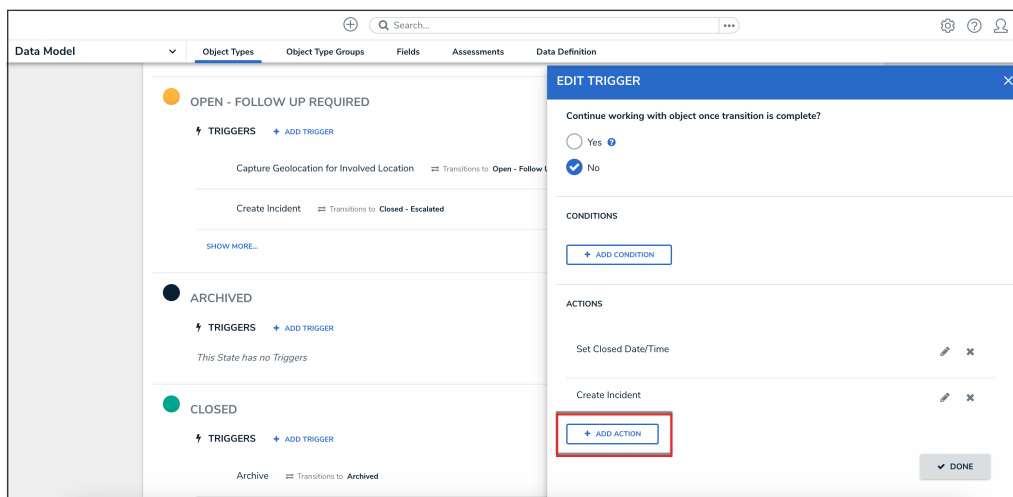
This action cannot be added to the **Creation** state.

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



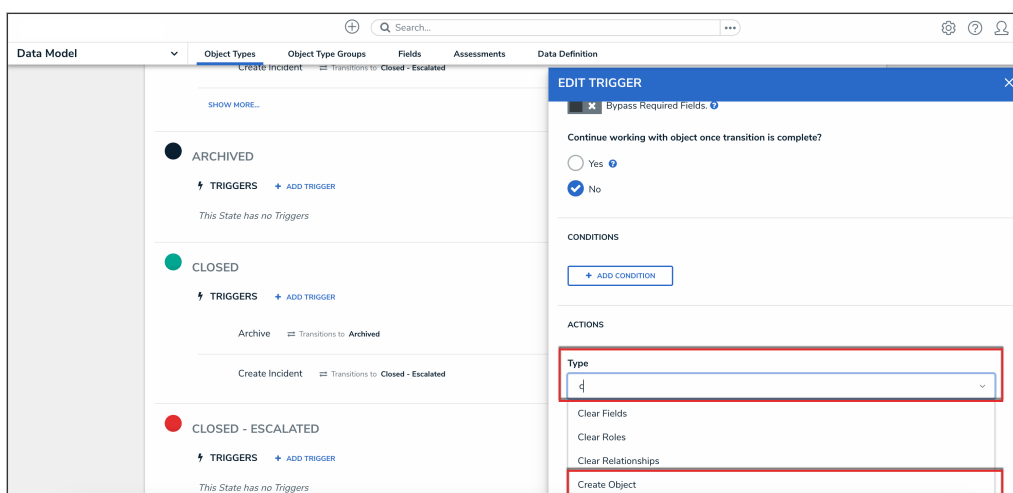
Configure Icon

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



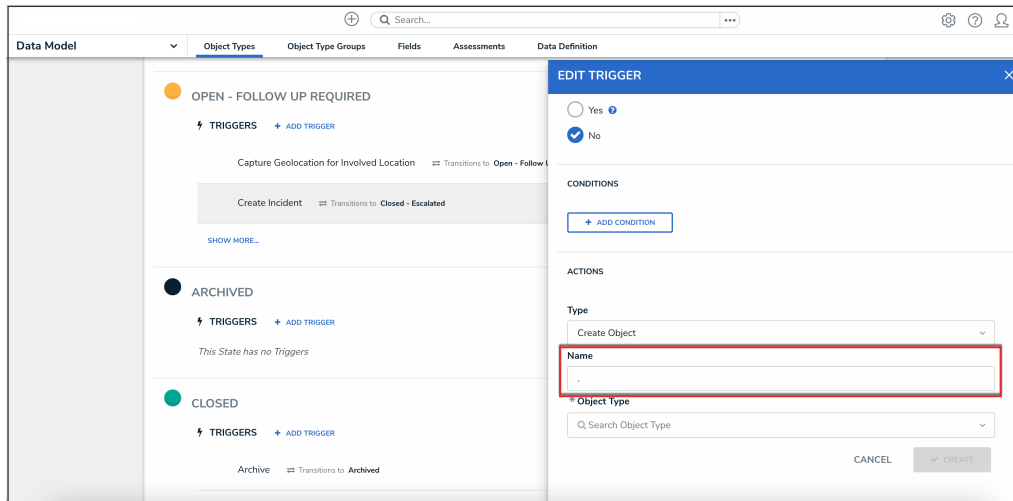
Add Action Button

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



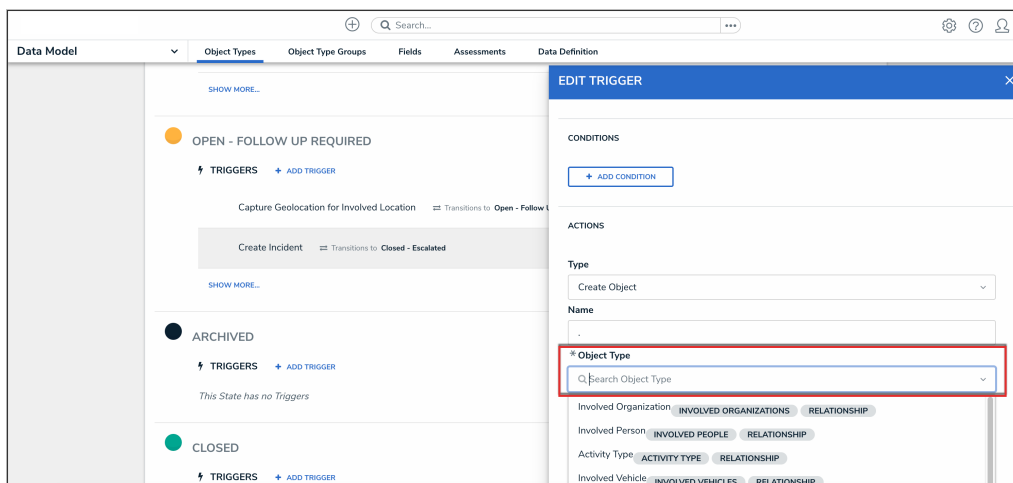
Type Dropdown

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



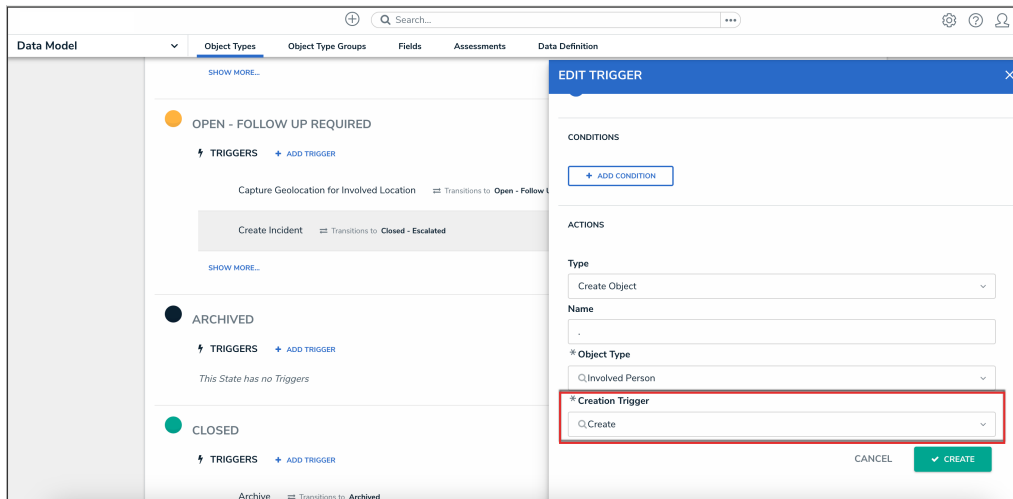
Name Field

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.



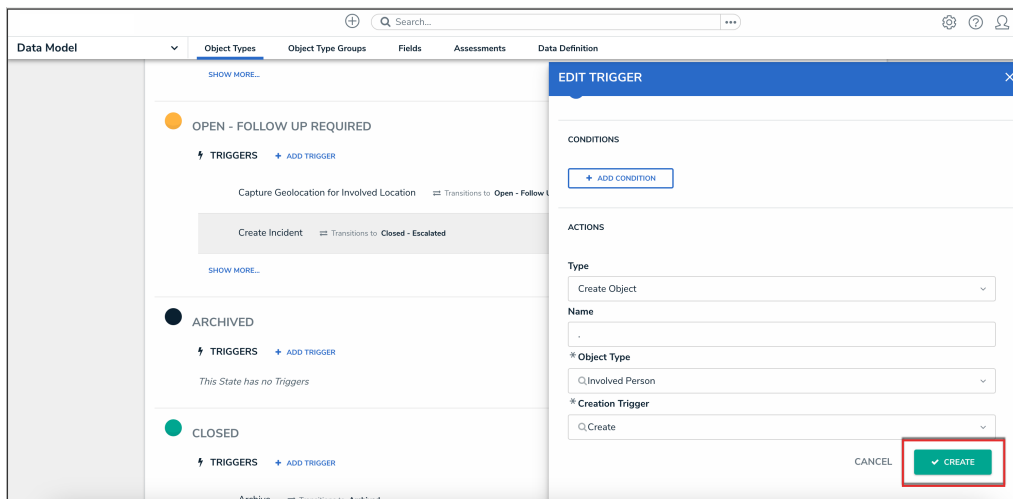
Object Type Dropdown

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



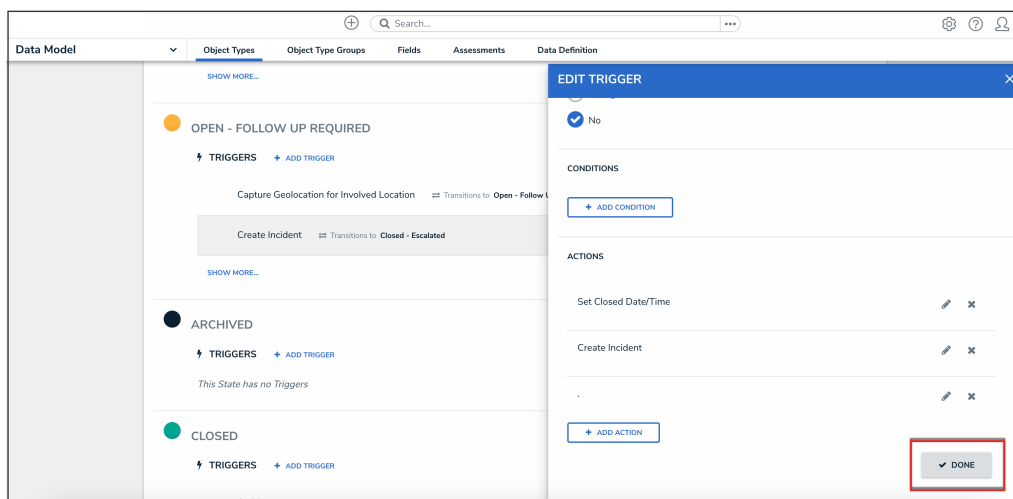
Creation Trigger Dropdown

8. Click the **Create** button.



Create Button

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



Done Button