

3.1 Create entity

This action allows you to create records for entities within the system (standard or custom modules).

For each individual field, you can set a static or dynamic value (i.e., one derived from the entities involved in the process itself) (Figure 1).

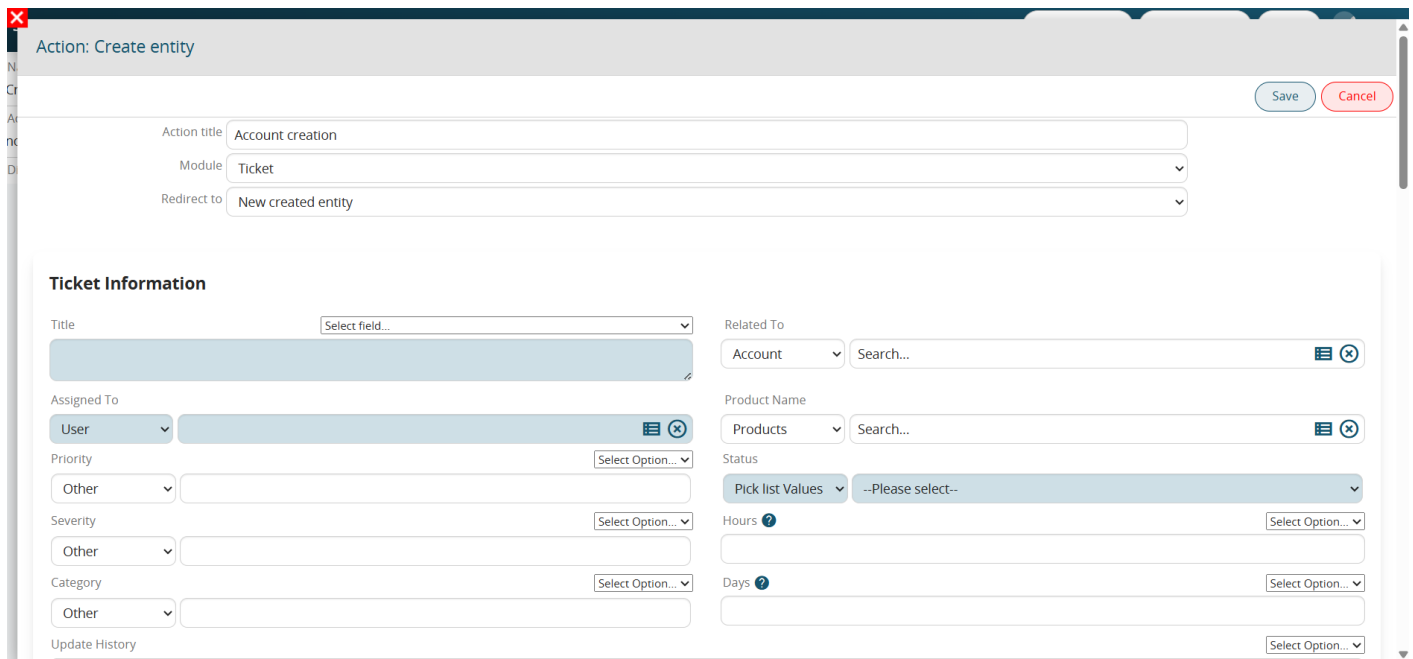


Figure 1

To select a dynamic value, the system provides a "Select option" picklist, from which you can access the entity fields of the modules involved in the process (Figure 2).

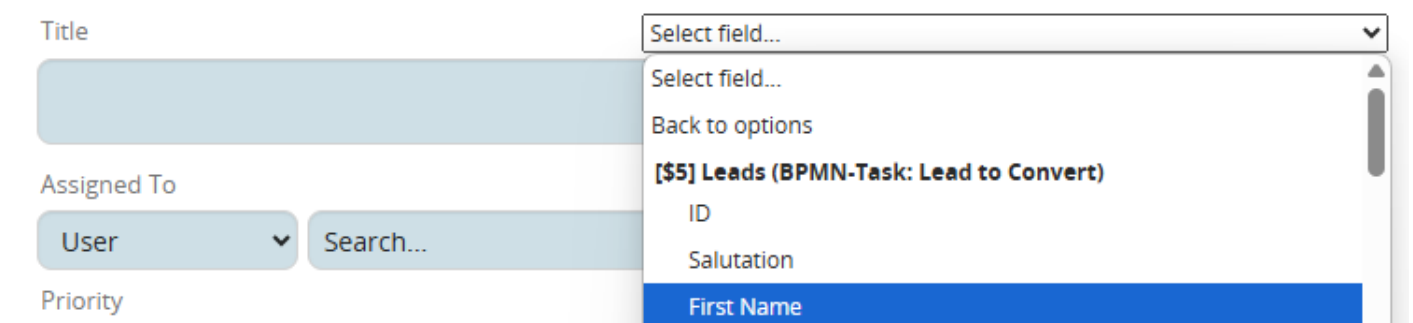


Figure 2

NOTE: For "Picklist" and "User" type fields, to use the "Select option" field, you must first select the "Other" item from the picklist available on the left (Figure 3).

The image shows a 'Related To' dropdown menu with the following options: Account (selected), Contact, Lead, and Other. To the right of the dropdown are two search bars, each with a 'Search...' placeholder and a clear button (X). The first search bar is associated with the 'Account' dropdown, and the second is associated with the 'Contact' dropdown.

Figure 3

NOTE: The system automatically applies a filter based on the source field from which the "Select options" picklist is being accessed; consequently, it will only display fields with a data type compatible with the source field.

For example, if you wanted to insert the content of the text-type "Surname" field from the Leads module into the "Linked to" field of the Customer Support module, the system would not make that field available, as it only allows the selection of columns from "Related to" type table fields. (Figure 4)

Figure 4

Furthermore, the "Create entity" action also allows us to trigger a redirect to the newly created entity or to an entity involved in the process. (Figure 5)

The image shows a configuration window titled 'Action: Create entity'. It contains the following fields:

- Action title:** Account creation
- Module:** --None--
- Redirect to:** New created entity

 Below the 'Redirect to' field is a dropdown menu with the following options:

- Please select--
- New created entity
- [55] Leads (BPMN-Task: Lead to Convert)
- ID

 The window has 'Save' and 'Cancel' buttons in the top right corner.

Figure 5

Clicking the "New entity created" button redirects the user to the new record created during this specific action.

Conversely, selecting the ID of one of the other entities involved in the process redirects the user to the record for that specific module.

Creating Calendar Events: "Notify" function

As of version 26.04, it is possible to configure and enable the sending of automatic reminders via the dedicated section. (Figure 6)

Action: Create entity

SaveCancel

No

Organizer

Event starts at

Event ends on

Date

Due Date

+▼1▼▼▼days▼

Time

Custom▼Hr.09▼00▼

All day

No▼

Date

Due Date

+▼1▼▼▼days▼

Time

Custom▼Hr.10▼00▼

RELATED TO

REMINDER

Send Reminder (mins) ☒ Yes ☐ No

Remind on : 0▼ day(s) 0▼ hours 5▼ minutes before the event starts

Figure 6

Revision #6

Created 2025-05-20 15:17:28 UTC by Riccardo

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