

3.18 Cycle Record

Starting with version 26.07, an action has been implemented that allows you to use records from a specific module without that module necessarily being part of the process itself.

Furthermore, unlike the "Loop Related Records" action (see section 3.12 for details), the module records do not even need to be related to the main entity involved in the process.

Simply put, it can be compared to a database query targeting the content of a specific module.

When the "Loop Records" option is selected from the "Other Actions" picklist, the system prompts you to choose the module to iterate over and the specific action to perform on each record in the loop.

As previously mentioned, you can select any standard or custom module available in the CRM. (Figure 1)

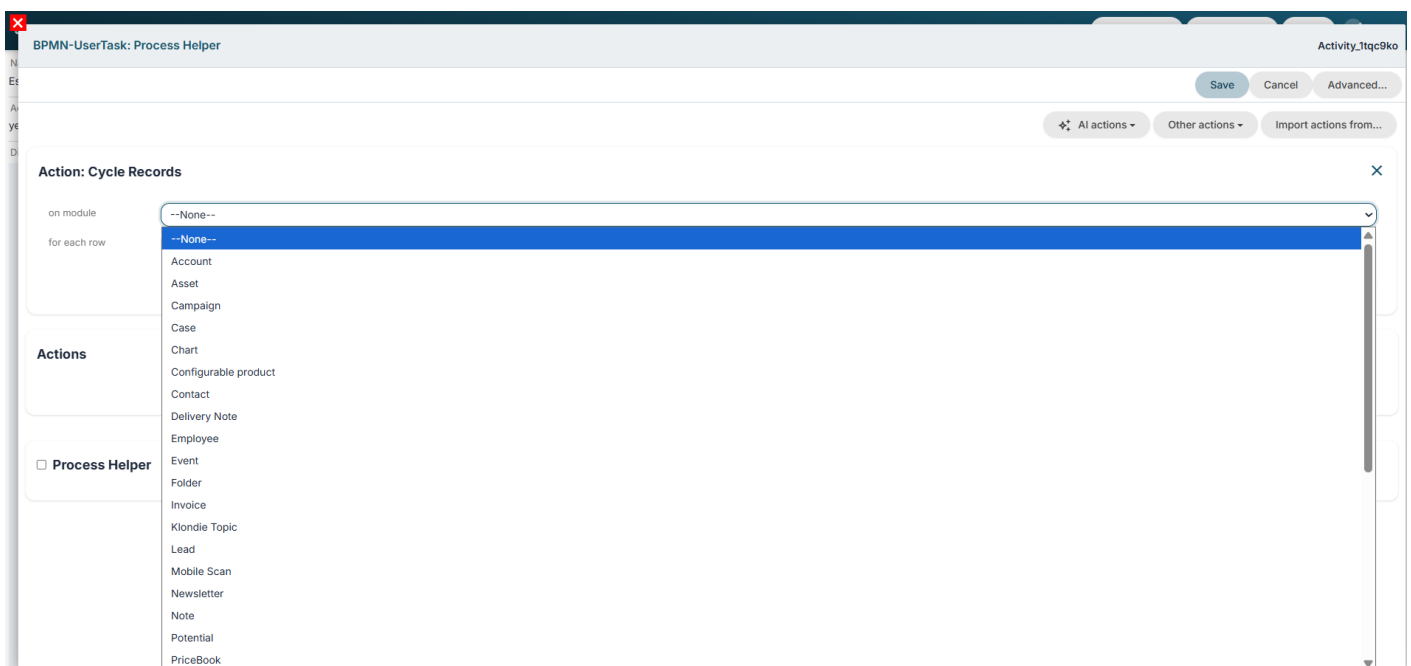


Figure 1

Clicking the "Create" button displays the actual configuration screen for the cycle action, where you can:

- Define the execution mode for the cycle action; for further details, refer to section 3.0. (Figure 2)
- Set a filter that the system will use as a starting point to retrieve the records to be cycled; the "All" filter is selected by default. (Figure 2)

- Define and apply additional conditions based on the fields of the module whose records are being cycled. (Figure 2)

The screenshot shows the 'Action: Cycle Records' configuration interface. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Action title' field is empty. The 'Execution mode' dropdown is set to 'Standard: the execution process waits for the action to complete before proceeding to the next one'. The 'Filter' is set to 'All', 'Ordered by' is 'None', and 'Sorting' is 'Ascending order'. The 'Conditions on module Contacts' section shows a condition for 'Email' not equal to a value. A 'New Condition' button is visible.

- Configure the details of the action to be performed for each iterated record; the available options are as follows:

Create entity

Allows you to create an entity from any module (standard or custom) for each record that meets the conditions set in the “Module conditions” section and the filters inherited as a base. (Figure 3)

The screenshot shows the 'Action: Cycle Records' configuration interface. At the top, there are 'Save' and 'Cancel' buttons. Below them, the 'Action title' field is empty. The 'Execution mode' dropdown is set to 'Standard: the execution process waits for the action to complete before proceeding to the next one'. The 'Filter' is set to 'All', 'Ordered by' is 'None', and 'Sorting' is 'Ascending order'. The 'Conditions on module Contacts' section shows a condition for 'Email' not equal to a value. A 'New Condition' button is visible. Below this, the 'Module' is set to 'To Do' and the 'Redirect to' field is set to '--Please select--'. The 'Task Information' section shows 'To Do' and 'Description' fields with 'Select Option...' dropdowns.

Figure 3

Update entity

Allows you to update an entity involved in the process for every record that meets the conditions set in the “Form conditions” section and the filters inherited as a baseline. (Figure 4)
Among the options available in the Entity picklist, the ID of the record currently being processed can be selected via a dedicated section that does not use a meta-ID.

Action: Cycle Records

Action title:

Execution mode: Standard: the execution process waits for the action to complete before proceeding to the next one

Filter: All Ordered by: None Sorting: Ascending order

Conditions on module Contacts

Entity: ID

INFORMATION GDPR

Contact Information

☐ Salutation: Other

☐ Contact No: AUTO GEN ON SAVE

☐ Sesso: Other

☐ Account Name: Accounts Search...

☐ Lead Source: Other

☐ Last Name: Select Option...

☐ Office Phone: Select Option...

☐ Mobile: Select Option...

☐ Home Phone: Select Option...

Figure 4

Send email

Allows you to send an email for each record that meets the conditions set in the “Form conditions” section and the filters inherited as a baseline. (Figure 5)

Action: Cycle Records

Action title:

Execution mode: Standard: the execution process waits for the action to complete before proceeding to the next one

Filter: Ordered by: None Sorting: Ascending order

Conditions on module Contacts

Email not equal to

New Condition

SMTP server: Default

From:

To:

Cc:

Bcc:

Reply to:

Subject:

Relate email to: Automatic (default)

Attach documents from: --None--

Figure 5

Sending a notification

Allows a notification to be sent for every record that meets the conditions set in the “Form conditions” section and the filters inherited as a baseline. (Figure 6)

Action: Cycle Records

Action title:

Execution mode: Standard: the execution process waits for the action to complete before proceeding to the next one

Filter: All Ordered by: None Sorting: Ascending order

Conditions on module Contacts

Email not equal to

New Condition

Notification Information

Description:

Creator: Users List manuele.maporti@gmail.com (Manuele Maporti)

Assigned To: User manuele.maporti@gmail.com (Manuele Maporti)

Figure 6

Create PDF

Allows you to create a PDF for each record that meets the conditions set in the "Form conditions" section and the filters inherited as a baseline. (Figure 7)

Action: Cycle Records

Action title: Clica ticket e crea PDF

Execution mode: Standard: the execution process waits for the action to complete before proceeding to the next one

Filter: Ordered by: None Sorting: Ascending order

Conditions on module Trouble Tickets

Priority equals Urgent

New Condition

PDF document Entity: ID

PDF Info

PDF subject: pdf document name

PDF template language: it_it

Related PDF to: Accounts

Assigned To: User manuele.maporti@gmail.com (Manuele Maporti)

PDF custom Info

Figure 7

SDK Functions

Allows you to execute an SDK function of the "Action" type for each record that meets the conditions set in the "Form conditions" section and the filters inherited as a baseline. (Figure 8)

Action: Cycle Records

Save Cancel

Action title

Execution mode: Standard: the execution process waits for the action to complete before proceeding to the next one

Filter Ordered by: None Sorting: Ascending order

Conditions on module Contacts

New Group

Email not equal to

New Condition

SDK Function: Set receiving newsletter (lead/contact/account, lock/unlock)

Additional parameters

Parameter value: \$mod:Contacts:crmid:curr Select Option...

Parameter value: unlock Select Option...

Add parameter

Figure 8

Call tool process

Allows you to launch an active tool process for each record that meets the conditions set in the “Form conditions” section and the filters inherited as a base. (Figure 9)

Action: Cycle Records

Save Cancel

Action title

Execution mode: Standard: the execution process waits for the action to complete before proceeding to the next one

Filter Ordered by: None Sorting: Ascending order

Conditions on module Contacts

New Group

Email not equal to

New Condition

Process tool: Esempio processo tool

Description: Aggiorna

Input schema

Email string: Inserire una mail Select Option...

IDContatto reference - Contacts: The id of the contacts, with the format 'module_id' + 'x' + 'record_id' Select Option...

Figure 9

To utilize the contents of the fields in the form being iterated over, the system provides a dedicated entry in the "Select Option..." picklist labeled \$mod (Figure 10).

Select Option... ▼

Select Option...

SDK Functions

Date functions

[\$33] Accounts (BPMN-Task:)

[\$mod] Trouble Tickets

Figure 10

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