

3.2 Update entity

This action allows updating an entity (instance of a module) directly involved in the process or otherwise an entity related to them.

Static or dynamic values (thus taken from the entities involved in the process itself) can be reported for each individual field.

The screenshot shows a configuration window titled "Action: Update entity". At the top, there are "Save" and "Cancel" buttons. Below the title bar, the "Action title" is set to "Update Entity". The "Entity" dropdown menu is open, showing a list of options: "ID", "--Please select--", and "[57] Leads (BPMN-Task: Initial condition)". The "ID" option is currently selected. Below the dropdown, the "Lead Information" section is visible, containing various input fields for lead data, each with a "Select Option..." button next to it. The fields include Salutation, First Name, Last Name, Company, Title, Lead Source, and Industry. There are also checkboxes for "Lead No", "Phone", "Mobile", "Fax", and "Email".

Figure 1

To select a dynamic value, the system provides the “Select Option” picklist from which the entity fields of the modules involved within the process can be accessed (Figure 2)

The screenshot shows a close-up of the "Select Option" picklist for the "Last Name" field. The picklist is open, displaying a list of options: "ID", "Salutation", "First Name", "Lead No", and "Last Name". The "Lead No" option is currently selected, highlighted in blue. The "Last Name" option is also visible at the bottom of the list. The "Last Name" field is checked in the "Lead Information" section.

Figure 2

CAUTION: For the “Picklist” and “User” type fields, in order to use the “Select Option” field you must first select the “Other” picklist item available on the left (Figure 3)

The screenshot shows a form with a checkbox labeled "Lead Status". To its right is a "Select Option..." dropdown menu. Below the checkbox is a picklist menu with three items: "Other" (selected), "Pick list Values", and "Other". To the right of the picklist menu is another "Select Option..." dropdown menu.

Figure 3

PLEASE NOTE: the system automatically performs a filter based on the source field from which the “Select Options” picklist is being consulted, consequently it will only show fields whose type can be accepted by the source field.

If, for example, within the “Connected to” field of the Customer Care form I wanted to enter the contents of the “Last Name” text type field of the Lead form, the system will not make that field available, this is because it will only allow selection of the columns of the “Related to” type table field. (Figure 4)

The screenshot shows a form with a checkbox labeled "Related To". To its right is a "Select field..." dropdown menu. Below the checkbox is a picklist menu with two items: "Other" (selected) and "Other". To the right of the picklist menu is another "Select field..." dropdown menu. Below the "Select field..." dropdown menu is a list of options: "Select field...", "Back to options", "[S7] Leads (BPMN-Task: Initial condition)", and "ID" (selected).

Figure 4

As of version 24.08, it is also possible to update fields of type “Related to” created within dynamic process helper forms (Figure 5)

Action: Update entity

Save

Cancel

Action title

Entity

--Please select--

--Please select--

[\$8] Trouble Tickets (BPMN-ScriptTask: Ticket creation)

ID

Project

Project Task

Product Name

Related To (Contacts)

Related To (Accounts)

Related To (Leads)

[\$7] Leads (BPMN-Task: Initial condition)

ID

Figure 5

Revision #3

Created 2025-05-20 15:20:06 UTC by Riccardo

Updated 2025-05-29 14:28:09 UTC by Riccardo