

# Interact with record pages

Interact with record pages in a business process

Version 7.17



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# Interact with record pages in a business process

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Using the business process elements, you can open a new or existing record for editing.

**Example.** Create a business process that the user can use to register a new opportunity, add a contract and then close the opportunity.

To add records in the system section, use the [ *Open edit page* ] element. To implement this logic, you need to open a new opportunity page for the user to let them enter all the necessary information. Then you will need to open a new order page and fill its fields with data from the opportunity. Finally, the page of created opportunity must open so that the user can change the opportunity stage.

## Open a new record page

To create a new opportunity in the process workflow:

1. Create a new process and add the [ *Open edit page* ] element to it.
2. Populate the [ *Open edit page* ] element setup area (Fig. 1):

Fig. 1 The [ *Open edit page* ] element setup area

Open edit page

Add opportunity

Which page to open?

Opportunity edit page

Editing mode \*

Add new record

Which default values to set in the fields of new records?

Name

"New opportunity"

+ Add field

Who fills page?

Owner \*

[#System variable.Current user contact#]

Recommendation for filling page \*

"Fill out the opportunity page"

Hint for user

When is the element considered complete?

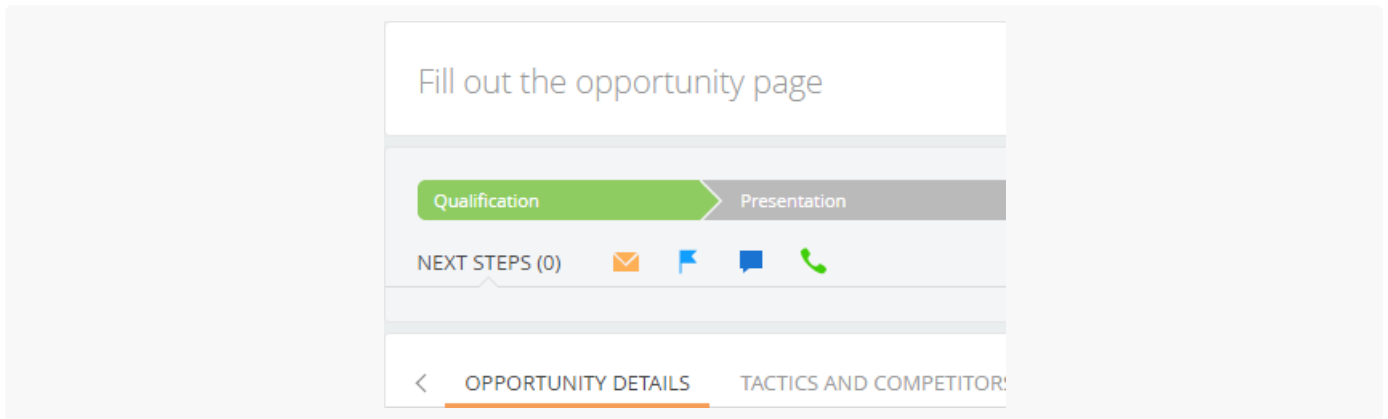
Immediately after saving the record

Create a list of results by column

- a. Enter element caption.
  - b. In the [ *Which page to open?* ] field, select "Opportunity edit page".
  - c. In the [ *Editing mode* ] field, select the "Add new record" option.
  - d. To automatically populate the [ *Name* ] field on the opened new opportunity page, add it to the [ *Which default values to set in the fields of new records?* ] block.
  - e. Populate the [ *Recommendation for filling page* ] and [ *Hint for user* ] fields.
  - f. Populate the [ *Hint for user* ] field to further describe actions to be performed by a user.
  - g. In the [ *When is the element considered complete?* ] field, select "Immediately after saving the record".
3. Save the process.

As a result, when the process item is initiated, a new opportunity edit page will open (Fig. 2).

Fig. 2 A new opportunity page displayed as part of a process workflow



## Create a new connected record

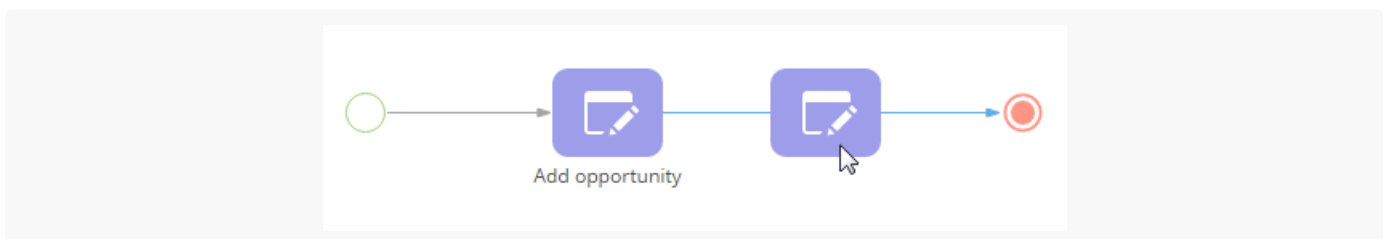
As part of process workflow, you can add records to Creatio sections using process element parameter values.

**Example.** After registering a new opportunity, the user must add an order for the opportunity. The fields on the new order page must be populated with the opportunity data.

To set up default field values for a new order page:

1. Add the [ *Open edit page* ] element to the outgoing sequence flow of the “Add opportunity” element (Fig. 3).

Fig. 3 Adding [ *Open edit page* ] element for order registration



2. Populate the [ *Open edit page* ] element setup area (Fig. 4).

Fig. 4 Populating the element setup area

Open edit page

Add contact

Which page to open?

Order edit page

Editing mode\*

Add new record

Which default values to set in the fields of new records?

Opportunity

[#Add opportunity.Record Id#]

+ Add field

Who fills in the page?

Owner\*

[#System variable.Current user contact#]

Recommendation for filling in the page\*

"Create document"

Hint for user

When is the element considered complete?

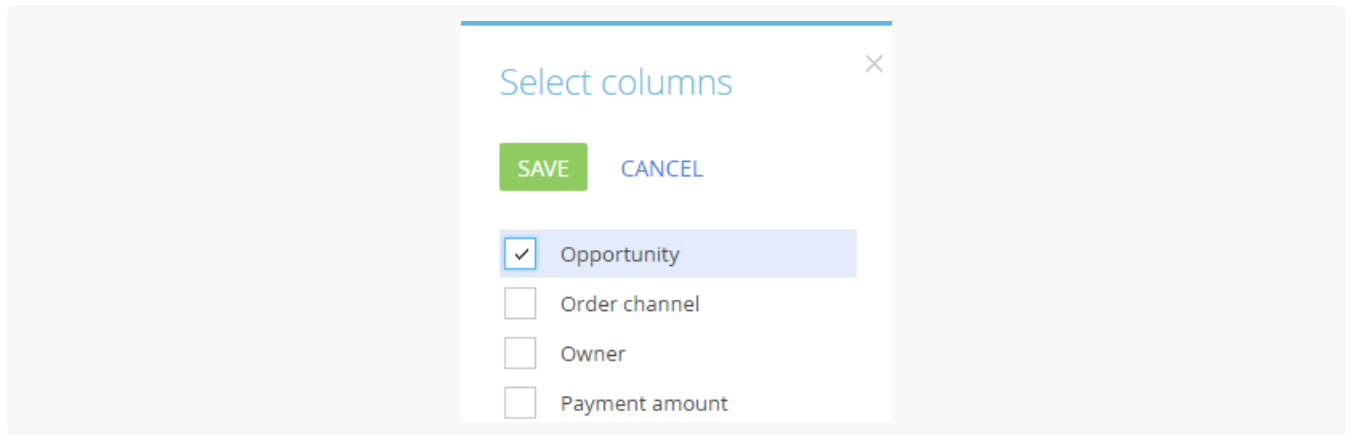
Immediately after saving the record

Create a list of results by column

**Note.** Record Id (record identifier) is a unique code used to identify records in the database.

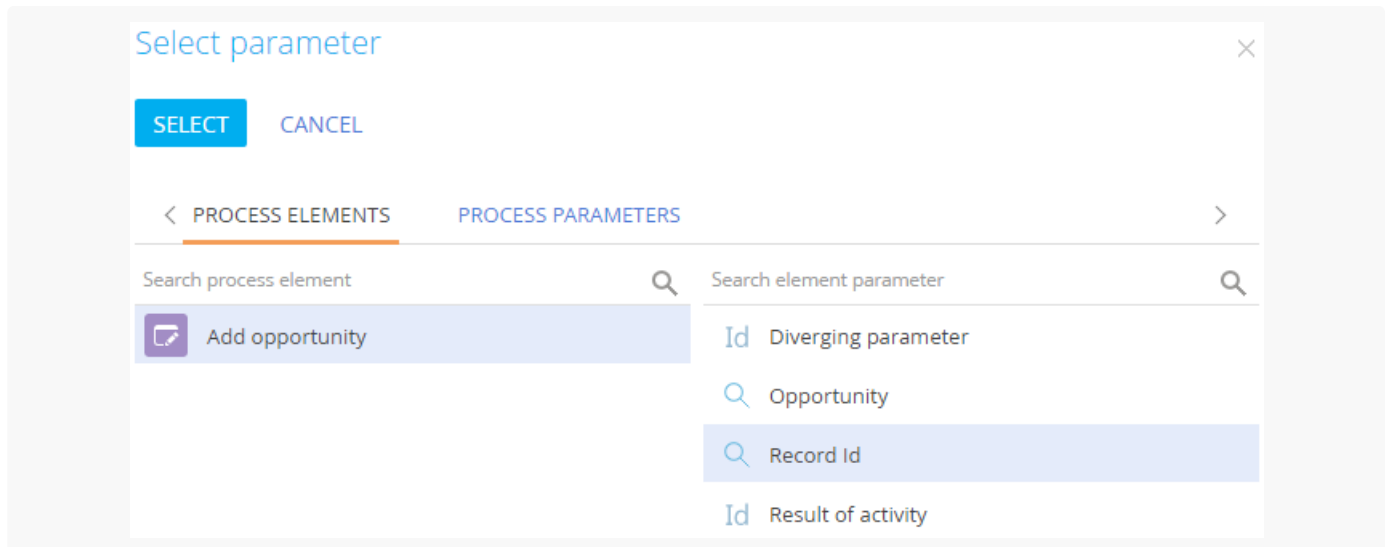
- Enter element caption.
- In the [ *Which page to open?* ] field, select "Order edit page".
- In the [ *Editing mode* ] field, select the "Add new record" option.
- In the [ *Which default values to set in the fields of new records?* ] click [ *Add field* ].
- Select the [ *Opportunity* ] column (Fig. 5).

Fig. 5 Selecting the [ *Opportunity* ] column to populate on a new page



3. In the parameter value menu, click [ *Process parameter* ] and select the [ *Create opportunity* ] element as the source of the parameter value.
4. In the right area of the parameter value window, select [ *Record Id* ] (Fig. 6).

Fig. 6 Selecting a record id of an earlier created record



5. Click the [ *Select* ] button.
6. Save the process diagram.  
As a result, when this process item is executed, a new order record will be created. In the [ *Opportunity* ] field of the order the needed opportunity will be specified.

## Edit a record

You can open edit pages for existing records with the [ *Open edit page* ] element.

**Example.** As part of the process workflow, the user must edit the opportunity that was created earlier.

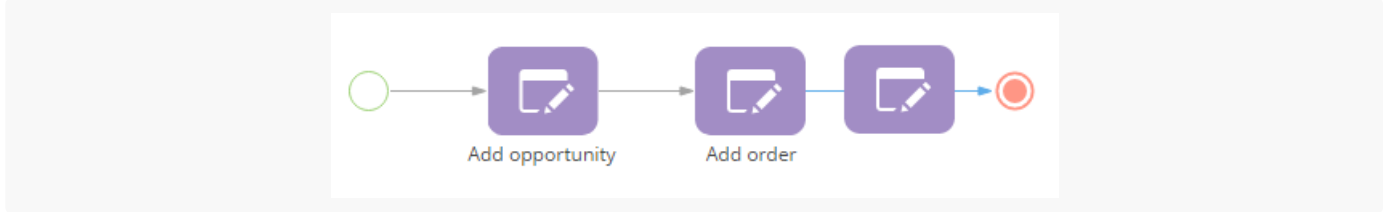
Use the [ *Open edit page* ] element to open edit page of a specific record.

To open the opportunity edit page:



1. Add the [ *Open edit page* ] element to the outgoing sequence flow of the [ *New document* ] element (Fig. 7).

Fig. 7 Sale process



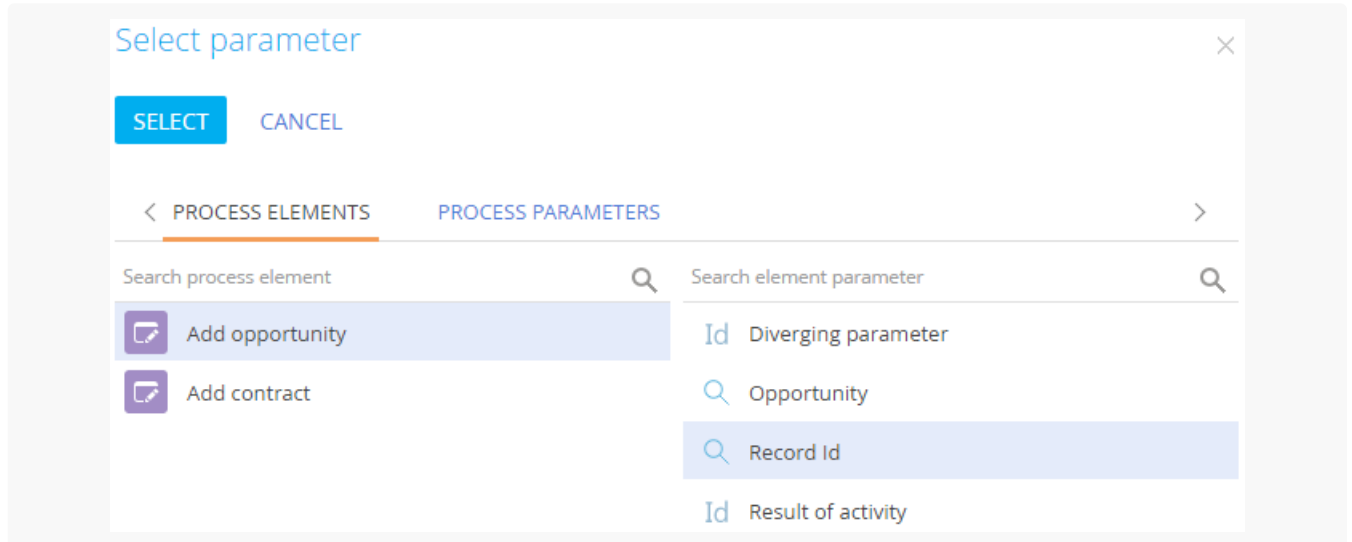
2. Populate the element setup area (Fig. 8):

Fig. 8 Parameters on the element setup area for editing an existing record

- a. Enter element caption.
- b. In the [ *Which page to open?* ] field, select “Opportunity edit page”.

- c. In the [ *Editing mode* ] field, select “Edit existing record”.
- d. Click the [ *Record Id* ] field and select [ *Process parameter* ] in the parameter value menu.
- e. In the parameter value window, select [ *Create opportunity* ].
- f. In the right area of the parameter value window, select [ *Record Id* ] (Fig. 9).

Fig. 9 Selecting a record id of an earlier created record



3. Click the [ *Select* ] button of the parameter value window.
4. Save the process diagram.  
As a result, the edit page of tie opportunity, which was created earlier by the “Add opportunity” element will open.

## Manage item completion conditions

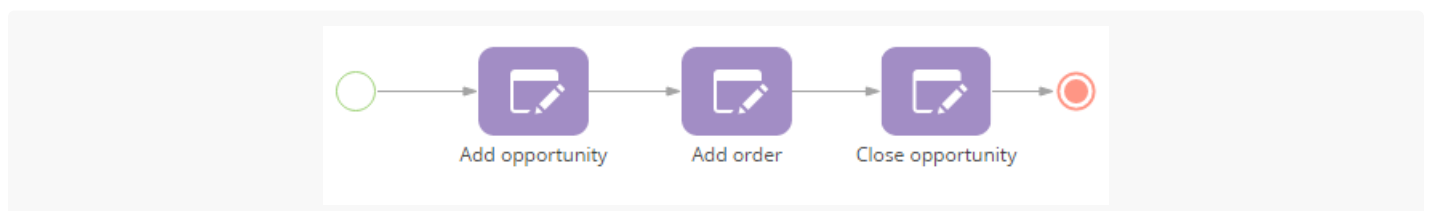
In the opportunity business process covered above, the “Close opportunity” element will be completed once the opportunity record is saved.

**Example.** To complete the “Close opportunity” process step, the user must actually close the opportunity by changing its stage to “Closed won” or “Closed lost”.

Use the [ *Open edit page* ] element to specify conditions for its completion.

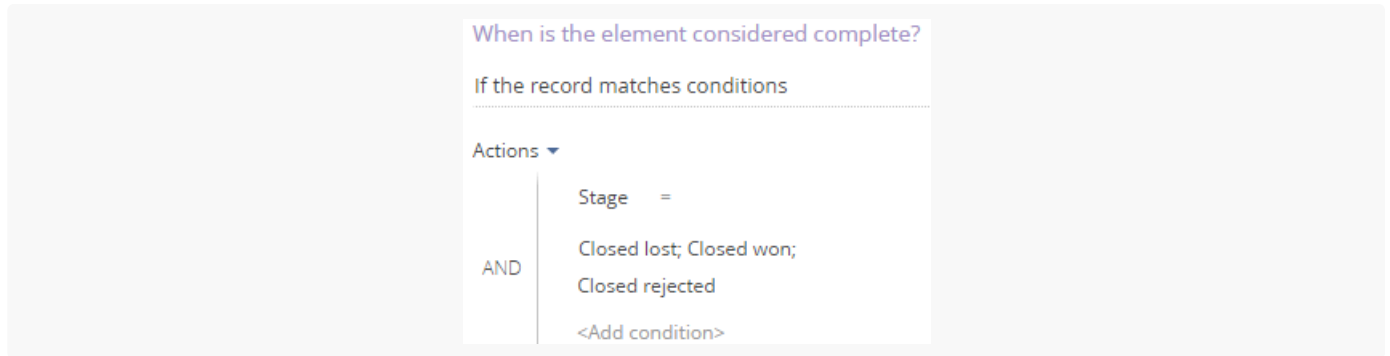
To have the opportunity process (Fig. 10) end only if the opportunity is closed:

Fig. 10 Opportunity process



1. Select the “Close opportunity” element on the process diagram.
2. On the element setup area, select the “If the record matches conditions” in the [ *When is the element considered complete?* ] field.
3. Use filter to specify conditions that the opened record must meet for the element to be completed. To complete the element if the opportunity is assigned certain stages, set up filter by the [ *Stage* ] field (Fig. 11).

Fig. 11 Setting up item completion conditions



4. Save the process diagram.