

Creating Steps

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Steps are the **individual actions** that make up a process. These could be system tasks (like updating a record or sending data to another system), human tasks (like submitting a form or approving a request), or even conditional logic.

To create a Step click on the “+ Step or Block” option and choose what you want to create from the dropdown menu.

Step Type	Purpose	Type
Display Page	Presents a Nova form for the user to complete, review, or approve.	User-facing
Run workflow	Executes an automated backend action (e.g., send notification, update status).	System task
Create record	Automatically creates a new record during the process.	System task
Update record	Updates an existing record, often using data captured in a previous step.	System task

These steps are the building blocks of user interaction and automation within any process flow.

