

# Create Record Step

Last Modified on 16/07/2025 3:20 pm AEST

Use a **Create Record** step in a ReadiNow Process when you need the process to **generate a new record** in the system—either as part of user input or system automation.

## Create Record Properties

Property	Description
Name	The name of the block that will appear on the process builder screen.
Description	Helpful description as to what is the purpose of the step.
Run Condition	The condition by which the Step will run. For example if a button named 'Approve' was clicked in from a different block then the step will be run.

## Configuration

Object	Select for what object is the new record going to be created.
Set created record as primary	<div>When this toggle is enabled:</div> <ul style="list-style-type: none"><li>• The created record becomes the main (primary) record referenced throughout the process.</li><li>• The "Object" selection field is disabled, since the primary record type governs this setting.</li><li>• The system will validate the compatibility between the selected page and the primary record type; if incompatible, a validation message is shown.</li><li>• Once the record is created and saved, it is automatically set as the primary record in the process instance.</li></ul>

Property	Description
Fields	Sets standard data fields like Text, Numeric, Auto Number to be shown and filled.
Choice fields	Configures dropdown/select-type inputs tied to a predefined list of values.
Lookups	Enables selection of related records (like a foreign key).
Relationships	Allows adding inline or data table relationship data to the new record.