Update Record Step

Use an **Update Record** step in a ReadiNow Process when you need to **modify data in an existing record as part of the process flow**—typically the **Primary Record** or any related record.

Update 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	When this toggle is enabled: • The created record becomes the main (primary) record referenced throughout the process. • The "Object" selection field is disabled, since the primary record type governs this setting. • The system will validate the compatibility between the selected page and the primary record type; if incompatible, a validation message is shown. • Once the record is created and saved, it is automatically set as the primary record in the process instance.

Property	Description
Fields	Lists all the fields of the above selected object.
Choice fields	Lists all the choice fields available within the selected object.
Lookups	Lists all the lookup fields available within the selected object.
Relationships	Lists all the choice fields available to the selected object.
Step Inputs	
Resource *Resource (object name)*	The record source from where you expect the data in the record was last updated. You would select the Output parameter of the step you suspect was triggered before the one you are configuring.
Field: *(chosen field name and type)*	When you select any field, choice field, lookup or relationship under Configuration section then a similar field will appear here for every field you choose.

Step properties

Type

Display page

Name

Step 1

Description

Run Condition

Configuration

Page type

Long form ⌄

Page *

Select Page ⌄

Select open form mode

○ View

◉ Edit

○ Create (New)

Sample Update Record property setting