

Create Records from a Process Table

This article discusses options for designing an interface to create records from a process table. The simplest method is a link to selected fields with a hyperlinked display with lookup, which allows the user to create a new record after searching for existing records. The most complex method is to create a duplicate set of fields in the process table that is converted into a new record by an action button.

Often when you have linked fields in a record, you will find that users want the option to create a new record in a background table without leaving the current record. This topic will review some of the common solutions you can use to allow users to create background table records.

If space in a table is limited, time is limited, or there are many fields to enter, the best solution is to train users to use the lookup search on a linked field to create new records. When the user must duplicate information from a record, an interactive conversion can carry some details from a process table into a window that allows the user to enter additional details.

If time and space allows, a more elegant solution is to design an interface that allows a user to create multiple linked records.

Typical Use Cases

- Creating an Asset within a Service
- Creating a Company, Location, and External User within a Contract record.

Properties of Lookup Search Creation

Any linked field with a lookup display allows users to create background table records if they have permission to create records in that table. This is the easiest solution to implement, and it is the option we use most commonly.

Advantages

- Easy to implement.
- Validations on record creation are run with the user present, giving the user an opportunity to fix errors.

Disadvantages

- Users must be trained to use the lookup window to create new record.
- If there are subtables, the user may create the wrong type of record.
- The user must select the record they created after they create a new record.
- Fields from the parent record cannot be included automatically in the new record.
- This option creates at least two new browser windows.

Properties of Interactive Conversion

When you want to include fields from a parent record in new records that are created, or create multiple records that are linked to each other, an interactive conversion shows the user the conversion dialogue and allows the user to change or enter additional details that will be converted into a new record.

Advantages

- Fields from the parent record are automatically included in the new record.
- Relatively easy to implement.

Disadvantages

- This option creates at least one new browser window.

Properties of Silent Conversion from Duplicate Fields

This solution allows you to design an interface that's easier to use than any other option. This is the most attractive solution. When the design is carefully thought out, the interface can be extremely intuitive for users.

Advantages

- Easy for users—particularly for end users who will not access the system frequently and will not remember details from training, or for end users who will not attend any training.

Disadvantages

- Creating and testing all of the necessary fields and rules takes significantly longer than the other options.
- Creation validations on the background table cannot be run with silent conversion, so errors cannot be fixed by the user.
- This option may require careful validations before conversion.

Questions to Ask

To determine which method is better for your implementation, think about the detailed requirements.

This set of questions guides you toward choosing the best field type to implement.

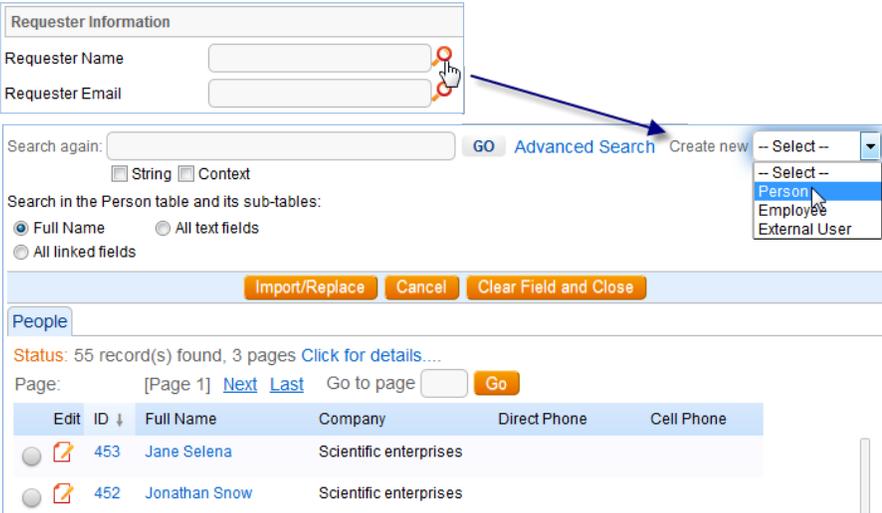
1. **Who maintains the data?** If power or end users maintain the data, a table is the only option. Choice lists cannot be modified by business users. If only administrators modify the choice list values, then either option may work.
2. **Who will be using this interface?** If it's relatively few users who will go through user training, any option may be appropriate. If it's many users who will not attend any training, you might consider designing a silent or interactive conversion interface.
3. **How often will users create new records?** If users will be creating records frequently, design an interface that makes that process easy, quick, and simple.

Sample Scenarios

When deciding which option makes more sense for your implementation, keep in mind the pros and cons of that method. No matter what decision you make, it impacts the rest of the design and build-out process.

Lookup Search Creation - Choosing a Requester in a Contract

When a link to selected fields is set to display as a hyperlinked box with lookup, users can use the lookup icon to first search for an existing Person, then choose to create a new Person record.



Requester Information

Requester Name

Requester Email

Search again: **GO** [Advanced Search](#) Create new **-- Select --**

String Context

Search in the Person table and its sub-tables:

Full Name All text fields

All linked fields

Import/Replace **Cancel** **Clear Field and Close**

People

Status: 55 record(s) found, 3 pages [Click for details...](#)

Page: [Page 1] [Next](#) [Last](#) Go to page **Go**

| Edit | ID ↓ | Full Name | Company | Direct Phone | Cell Phone |
|------|------|---------------|------------------------|--------------|------------|
| | 453 | Jane Selena | Scientific enterprises | | |
| | 452 | Jonathan Snow | Scientific enterprises | | |

Employee

Save **Cancel** **Contact Information** **Job** **Related Records** **Emails** << >>

ID: 455 Type: Employee

Work Status: Working **Export to Outlook**

Employee Information

First Name Last Name

Title Department

Email Email Pager

Direct Phone Ext Cell Phone

Interactive Conversion - Converting a Lead into a Company, Opportunity, and Person

In a Lead record, when the status is changed to Converted and the record is saved, the record runs an interactive conversion that allows the user to change or add additional details to convert fields from the Lead into a new Company record, a new Opportunity record, and a new Person record.

Changing the status to **Converted** will bring up a dialogue allowing you to convert the lead to a company, opportunity and contact

Status: **Qualified**

Sales Rep:

Last Name:

Convert
Cancel

Convert Lead

Convert to Location (Location)

Do not convert to Location

Company / Location: Highland Supplies - Highland Main Address

*Location Name: Highland Main Address

Convert to Company (Company)

Do not convert to Company

*Company Name: Highland Supplies

Public Company: Choose one ▾

Account Rep (Person:Full Name): Jane Barrows 🔍

Annual Revenue: \$

Convert to Person (Person)

Do not convert to Person

Email: amanda.smith@example.com

Next Action: Choose one ▾

Next Action Due: 📅 ⌚

*Company (Company:Company Name): Highland Supplies 🔍

Account Rep (Person:Full Name): Jane Barrows 🔍

Comments:

User time zone: Choose one

Convert to Opportunity (Opportunity)

Do not convert to Opportunity

*Opportunity Name: Highland Opportunity

Next Action: Choose one ▾

Rating: Choose one ▾

Sale Value: \$ 546,000

Probability of sale: 90 %

Next Action Due: 📅 ⌚

*Company (Company:Company Name): Highland Supplies 🔍

Sales Rep (Person:Full Name): Jane Barrows 🔍

Convert
Cancel

Silent Conversion Examples

Below are some cases where we the silent conversion option was used.

Creating a New Company and Location in a Contract

A radio button, Contract Party Entry, has a default of "Existing Company" to lead the user to search for an existing Company before trying to create a new Company. The radio button controls the visibility of the linked fields from the Company and Locations tables and of the local fields that are converted to Company and Location records.

The Contract Party Entry radio button, the Company Name, and the Create Company action button all have pop-up text asking the user to search for existing companies before creating a new company. The Input Instructions are displayed for the New Company fields, instead of the field labels, so that both the linked and local fields are displayed with the same labels.

This screenshot shows the 'Contract Party Information' form. The 'Contract Party Entry' section has two radio buttons: 'Existing Company' (selected) and 'New Company'. Below this, there are input fields for 'Company Name' and 'Location Name' (a dropdown menu).

This screenshot shows the 'Contract Party Information' form with 'New Company' selected. A 'Create Company' button is visible. The form includes fields for '*Company Name', '*Street Address 1', '*City', '*Primary Role', 'Street Address 2', and '*Country'.

This screenshot shows the 'Contract Party Information' form with 'New Company' selected. A 'Create Company' button is visible. A warning message is displayed: "Before creating a new company, please search for existing companies, to prevent creation of duplicate company records." The form includes fields for '*Company Name', '*Street Address 1', '*City', '*Primary Role', 'Street Address 2', and '*Country'.

Conversion details

Fields that are required in the Company or Location record are required in these local fields. The conversion matches on Company Name, which will then update the Company record with the details supplied by the conversion. Ideally, the conversion should match on a unique, required field.

The conversion options also include the option "Create record required for linked field relationship if a matching record does not already exist." This is the option that allows the system to create a set of linked relationships when creating multiple fields at once.

Along with the details supplied in the fields shown, the conversion maps the Contract's ID into a field on both the Companies and Locations tables, Contract Source ID, which allows the new Company and Location records to return to the contract and populate the link to a Company and to a Location.

Create Company Action Button

This action button's primary purpose is to run the conversion action to the Company and Location tables. The action button starts by setting the New Company Location Name to a compound of the Company Name and City. If that company already existed with other locations, the conversion will update the Company record to include the new location.

The action button then runs the silent conversion to the Company and Location tables. The last action is to blank out the fields and reset the Contract Party Entry radio button to Existing Company.

Rules on the Company table

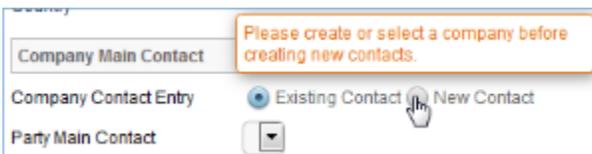
An "All Create Actions by API" rule is filtered by an advanced search, "Contract Source ID last modified from any to any". The rule runs a Linked Record action to the contract through Contract Source ID, and it runs an Update Field action to set the Company ID to the parent record's ID.

Rules on the Locations table

An "All Create Actions by API" rule is set up exactly as in the Company table. An additional Linked Record action through the link to a Company sets the Main Location ID to the parent record's ID.

Creating a New Contact in a Contract

Similar to creating a new Company and Location, a radio button, Contract Contact Entry, controls the visibility of linked and local fields for entering a Party Main Contact at the selected Company. Pop-up text asks the user to create a Company before creating a Contact, and a validation prevents the user from creating the Company if a Contact has not been chosen.



| Company Main Contact | | | |
|-----------------------|--|--|--|
| Company Contact Entry | <input type="radio"/> Existing Contact | <input checked="" type="radio"/> New Contact | <input type="button" value="Create New Main Contact"/> |
| *First Name | <input type="text"/> | *Last Name | <input type="text"/> |
| *Email | <input type="text"/> | Phone | <input type="text"/> |

Conversion Details

The Contact details entered into the local fields are converted into an External User record. Fields that are required for an External User record are required in the local fields. The conversion matches on email address, which again will update the External User's record with the details supplied by the conversion. The Company ID is mapped with the contact details, creating a link from the External User to the Company.

The conversion options also include the option "Create record required for linked field relationship if a matching record does not already exist." This is the option that allows the system to create a set of linked relationships when creating multiple fields at once.

Along with the details supplied in the fields shown, the conversion maps the Contract's ID into a field on both the External User subtable, Contract Source ID, which allows the new External User record to return to the contract and populate the link to the External User.

Create Contact Action Button

This action button's primary purpose is to run the conversion action to the External User subtable. The action button validates that the linked Company field is not blank, then runs the silent conversion to the External User subtable. The last action is to blank out the fields and reset the Contact Contact Entry radio button to Existing Contact.