

Replacement Variables Table

The Replacement Variables table is a background table that can be used to support any of the process tables, such as Approvals, Contracts, Projects, or Tasks. Replacement Variable records store a variable chain used to pull in values from a linked field relationship. Generally, these variables are copied into template records, such as in the Approval Templates table, and then used to dynamically assign records or set other field values when a process table record is generated from a template.

Replacement Variable

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ID	2	Status	Active		
Related To	Contracts	Used in Field	Approval Assigned To	Assignment Based On	Person from Contract
List Value	Contract Owner				

Variable Details

Variable	<code>\$contract_id.internal_contract_owner</code>	Formula Help
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Use Case

Replacement Variables are used by Approval Templates to generate Approval records for contracts, change requests, documents, or service requests.

To create a Replacement Variable that will be used in Approvals, set Used In Field to the value Approval Assigned To. The value in the List Value field will show up in the Assign To drop-down in an Approval Template. Last, create a variable chain from the Approvals table to the appropriate field variable. For example, `$contact_id.requester_name` finds the name of the Requester in the linked Contract record, while `$contract_id.requester_id.manager_name` finds the Requester's manager.



Caution: *The Variable should be a variable chain that starts from the Approval record—not from the Approval Template!*

Admin Note: *The values "Task Assigned To" and "Other" do not link to any automation in the default setup, but they can be deployed and used with minor modifications to Task Templates or other template table.*

To use a Replacement Variable in an Approval Template, power users can create an Approval Template and set Assign Approval Based On to the value Person from Contract. The user can then select a value for the Assign To dropdown, which contains a link to all Replacement Variable records for which Used in Field is Approval Assigned To.