Update Fields Actions

Update Fields actions are used to modify one or more fields in the selected record or a linked record in another table. You can modify field values in several different ways, such as with standard text, a saved search, a regular expression, or a formula. The available options depend on the type of field being modified.

> (i) **Example**
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> Update Fields actions can be used in many different ways:
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> - Assign records to the appropriate team.
> - Increment or decrement number fields.
> - Add or subtract time from date/time fields.
> - Change the status of a record when specific conditions are met.
> - Manage the process flow between related tables, such that if an update is made in one table, fields can then be updated in the related tables.
> - Populate a linked field based on search criteria. For more information, see Populating a Linked Field with a Saved Search.
> - Update records in a related table when some condition is met.

Regular Expressions in Update Field Actions

You have the option to use a regular expression (regexp) in the Formula field of Update Field actions. This type of replacement also accepts special characters. For example, regexp '/;+/\n/' replaces ";" with a line break. If you're unfamiliar with regexp, use one of the other options for updating field values or seek out one of the many online resources for using regexp.

Create an Update Fields Action

You can find the Actions wizard with several different navigation paths, but you'll commonly just click Setup [*Table Name*] on the left pane for the table where you wish to create your action.

1. Click the Actions tab in the Table wizard.
2. Click Create Update Fields Action.
3. On the General tab, name your action and give it a description.

> ⚠ Once your action is saved, the system automatically adds a U: before your given title to distinguish the action as an Update Fields action.

4. Navigate to the Fields tab and select the fields you want to update. By default, only fields on the current table are available fields. To update fields from a linked set, select a value from the linked field drop-down; this updates both the local fields listed and the linked fields in the drop-down. You can select a field in the linked table, or select another linked field to access another linked table in the chain. If you select a one-to-many link from the Referring Tables section of the drop-down list, all linked records from that table are updated, regardless of which referring table you select. For more information about updating linked fields, see Updating Linked Records.
5. On the Values tab, select a new value for the field.
6. On the Errors tab, choose how you want the system to respond if there is a system error while the field is being updated.
7. Click Finish.