

Creating a Date-Based Trigger

Last Modified on 06/12/2023 10:21 am EDT

Overview

The Date-based Triggers feature allows an Administrator to set up Triggers based on a date Field or a Formula that produces a date variable.

Date-based Triggers run on the Field or Formula date associated with the Trigger, help decrease the number of Triggers that run nightly and improve system performance.



Caution

Please contact your CSM in regards to switching Nightly Triggers to Date-Base Triggers.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to create a Date-Based Trigger.

Related Information/Setup

Additional Information:

- Date/Time Fields and Formulas are currently not supported. The system automatically filters out all time-related Fields and Formulas for the Date Field/Formulas dropdown menu.
- A system Warning will pop up when a user attempts to delete or unlink a Field or Formula that is part of a Date-base Trigger.
- The Data Audit Trial will list all Date-based Trigger records.
- The Date-base Triggers procedure will run once a day before the Nightly Triggers procedure.
- Recover procedures are in place encase an error occurs during the Date-base Triggers procedure.

Limitations:

 Currently, the Date-base Trigger procedure will process up to 1000 Triggers per Org nightly. Any remaining Triggers that are not processed will be processed as part of the Date-base Trigger procedure the next night.

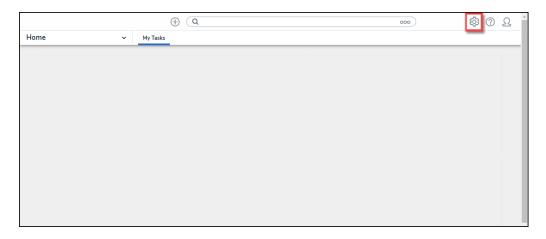
Please follow the link below for more information on Triggers.



- Add a Nightly Trigger and Transition to a State
- Orchestration Event Action in Resolver Core
- Add a Create Object Action in Resolver Core

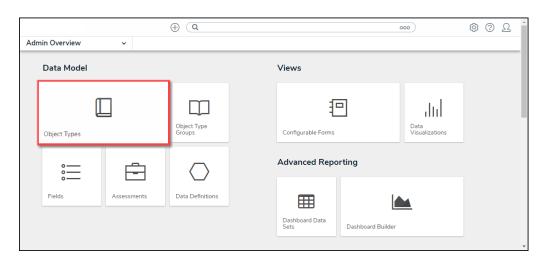
Navigation

1. From the *Home* screen, click on the **System** icon.



System Icon

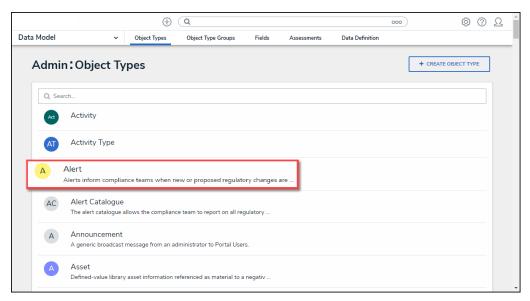
2. From the *Admin Overview* screen, click on the **Object Types** tile under the *Data Model* section.



Object Type Tile

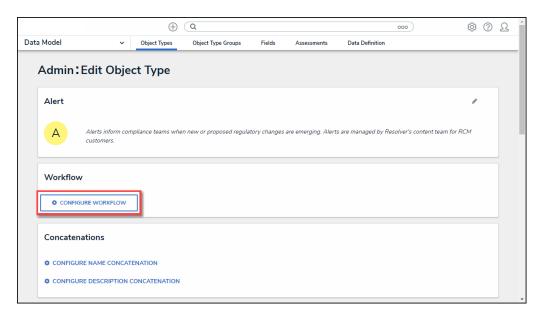
3. From the *Admin Object Types* screen, select an **Object Type**.





Object Type

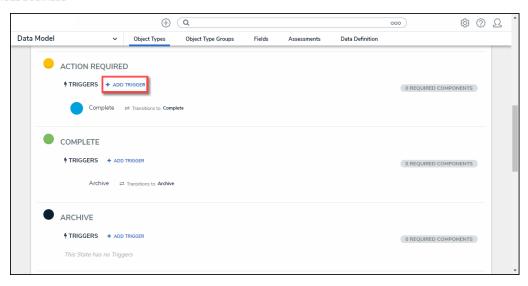
4. From the Admin Edit Object Type screen, click on the Configure Workflow button.



Configure Workflow Button

5. From the *Admin Edit Workflow* screen, click on an + **Add Trigger** link under one of the listed **States**.





+ Add Triggers Link



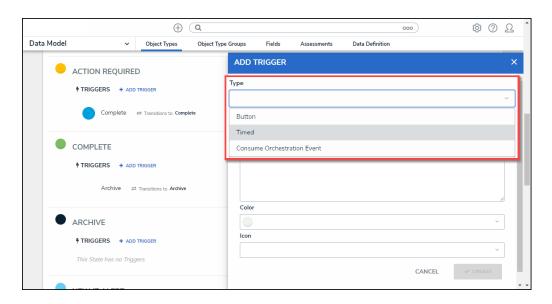
Note:

Timed Trigger cannot be added to a **Creation** state.

Creating a Date-Based Trigger

An Administrator can create a Date-based Trigger from the *Add Trigger* screen.

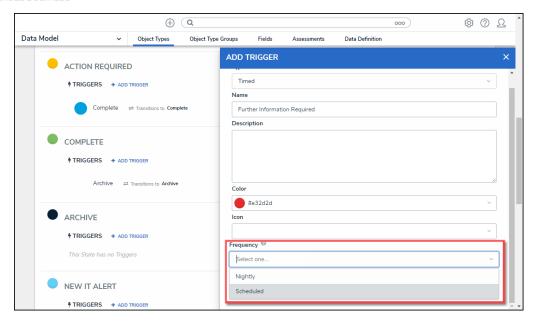
1. From the *Add Trigger* pop-up, select **Timed** from the **Type** field dropdown menu.



Type Field

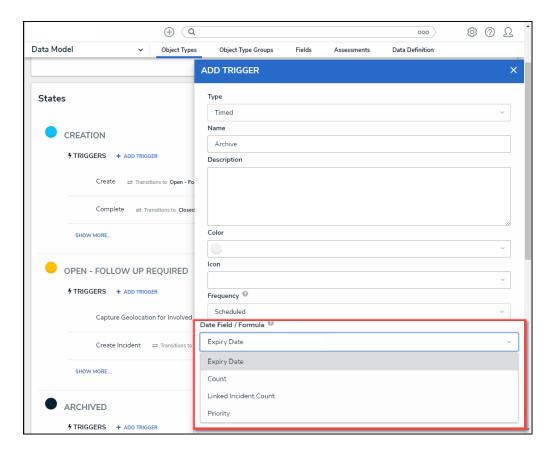
- 2. Enter a **Trigger Name** in the **Name** field.
- 3. (Optional) Description, Color, and Icon are optional fields.
- 4. Select **Scheduled** from the **Frequency** field dropdown menu.





Frequency Field

5. Select a Field or Formula from the Date Field/Formula field dropdown menu.



Date Field/Formula Field

6. Click the **Create** button to create the Date-Based Trigger.