Add a Messaging Action to a Transition

Last Modified on 03/19/2022 2:56 pm EDT

The **Messaging** action sends an email to users within one or more selected roles once objects have successfully transitioned to the next state. To control the contents of the email, you can choose a default or custom email template and select which configurable form is displayed when the user clicks the link provided in the email to view an object. When creating this action, you must choose one of the following delivery frequencies:

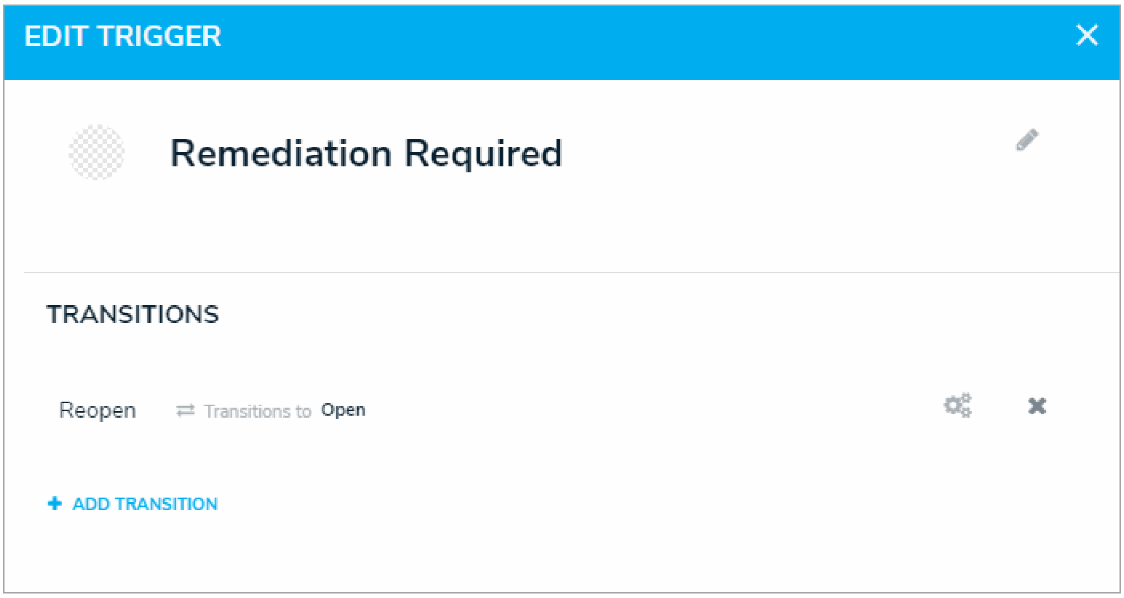
- **Immediate:** Sends an email to users in the selected role(s) immediately following the object's transition.
- **Nightly:** Sends a single email to users in the selected role(s) with a list of the objects that transitioned. If additional nightly messaging actions have been added to other workflows or object types, a single email digest with those objects will be sent to the user **only if the same role and email template has been selected on each messaging action.** If a different role and/or template has been selected for multiple workflows or object types, users may receive multiple nightly emails. See the Timed Triggers & Nightly Emails Schedule article for more information on when these emails are sent.

Before you can create this action on a workflow state, a transition must be created. See Add a Trigger & Transition to a State article for instructions.

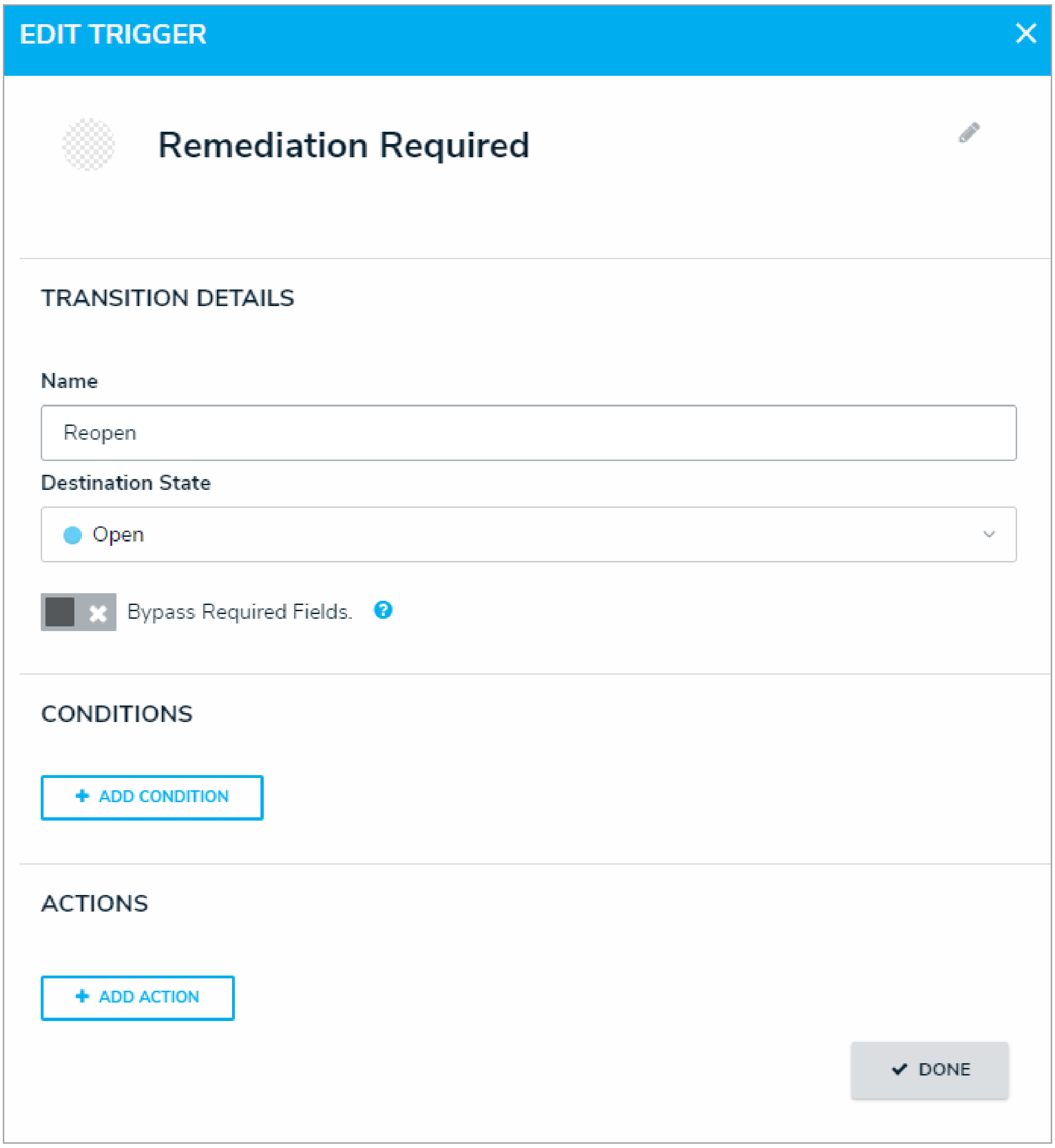
> The role(s) added to the **Messaging** action must be properly configured for the selected object type and workflow state. See the Roles and Workflow Permissions sections for more information.

To add a Messaging action to a transition:

1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the icon next to the transition.

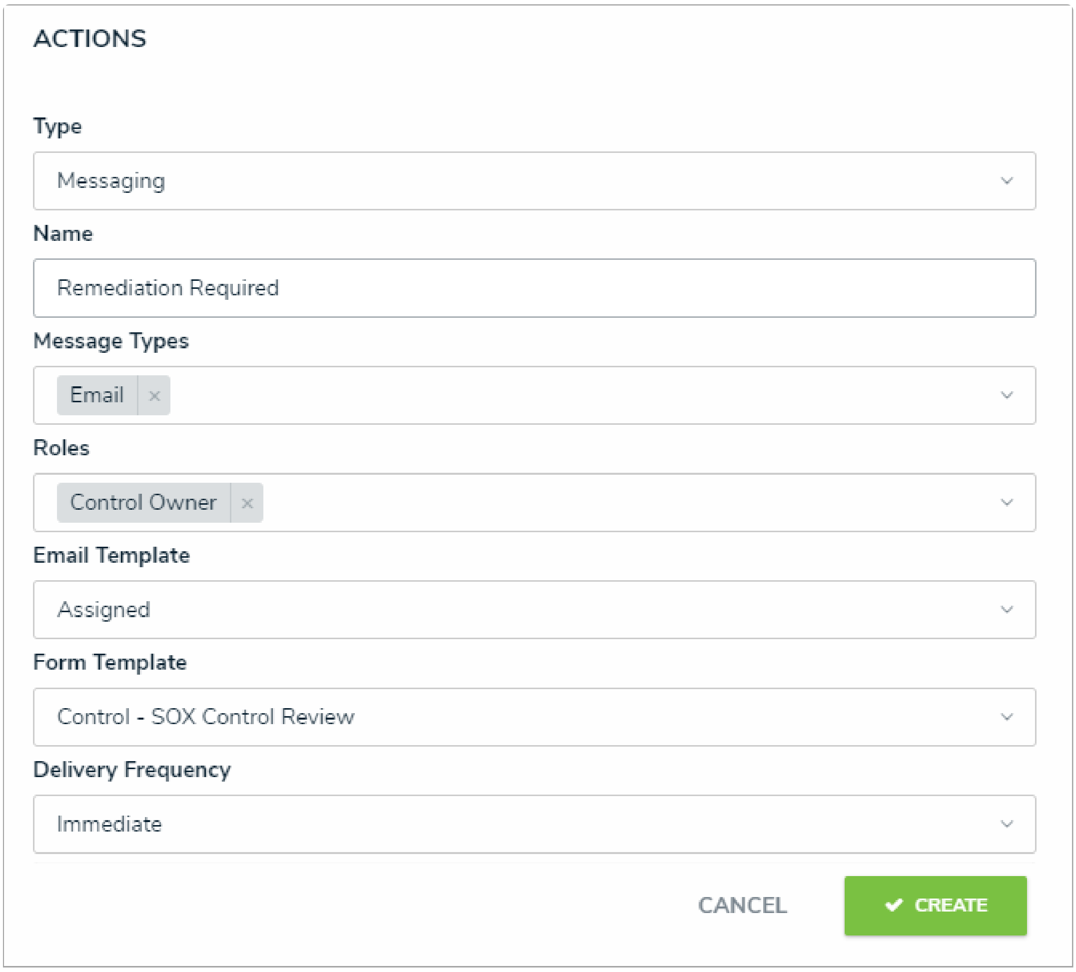


3. Click **Add Action** in the **Actions** section.



4. Select **Messaging** from the **Type** dropdown menu.

5. Enter a name for the action in the **Name** field.
6. Select **Email** from the **Message Types** dropdown menu.
7. Select the roles that should receive the email from the **Roles** dropdown menu.
8. Select a default or custom template (if any) from the **Email Template** dropdown menu. The default templates (which may have been renamed or edited) include:
    - **Standard:** Advises the user the one or more objects can be accessed.
    - **Assigned:** Advises the user that one or more objects have been assigned to them.
9. Select the configurable form from the **Form Template** dropdown menu. This is the form that will be displayed when the user clicks on an object link in the email.
10. Select one of the following options from the **Delivery Frequency** dropdown menu:
    - **Immediate:** Sends an email to the users in the role(s) immediately following an object's transition. This is the default frequency.
    - **Nightly:** Sends an email to the users in the role(s) at the appropriate time for your organization's environment. If additional actions with a nightly frequency have been added to other object types or workflows using the same role and email template, the user will receive a single email digest for multiple object types.



A new Messaging action.

11. Click **Create**.