Creating a Date-Based Trigger

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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

- 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.

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](#)

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.

Navigation

1. From the **Home** screen, click on the **Administration** icon.
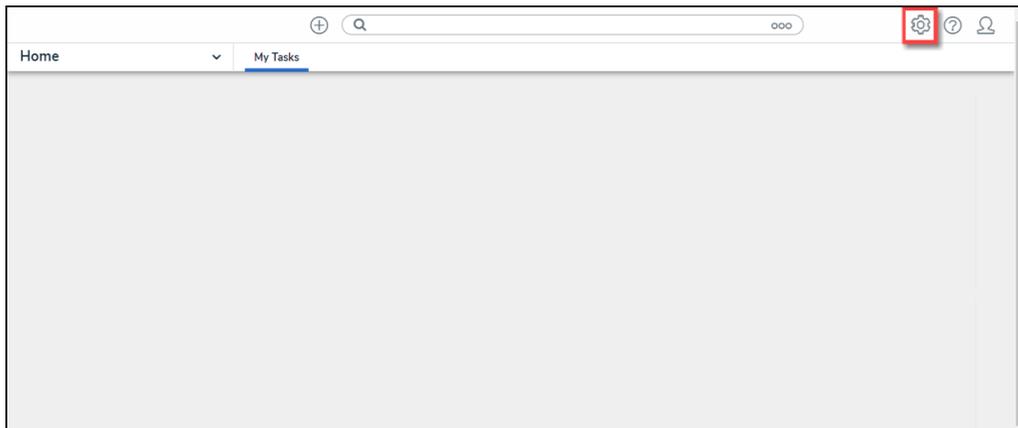
Administration Icon

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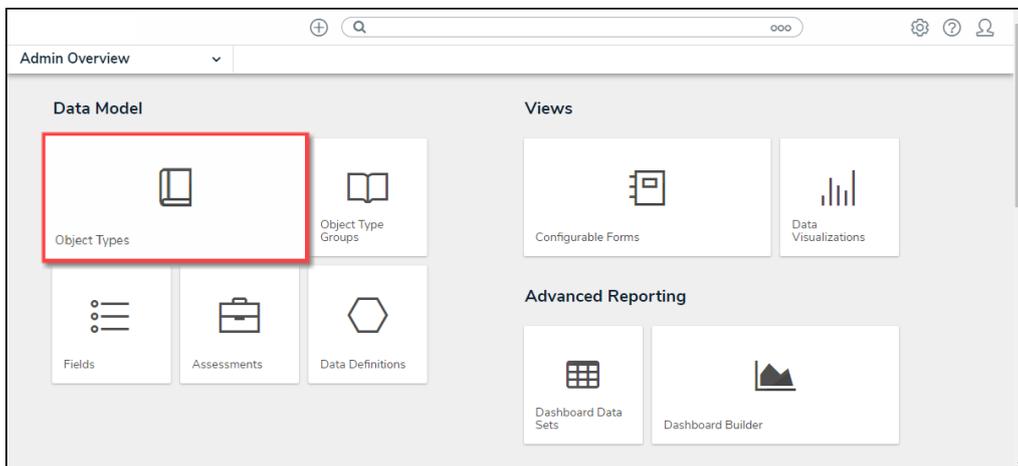
Object Type Tile

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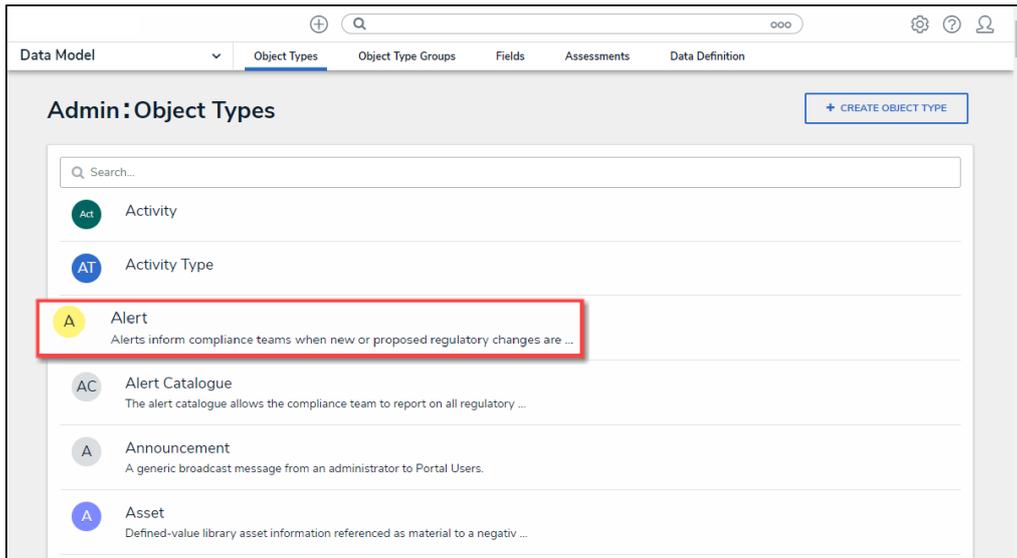
Object Type

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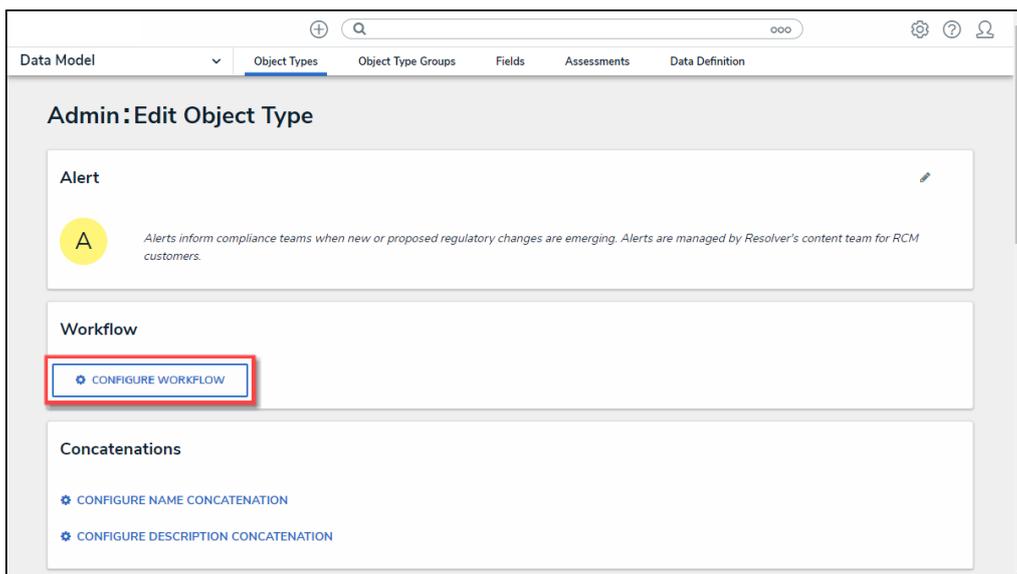
Configure Workflow Button

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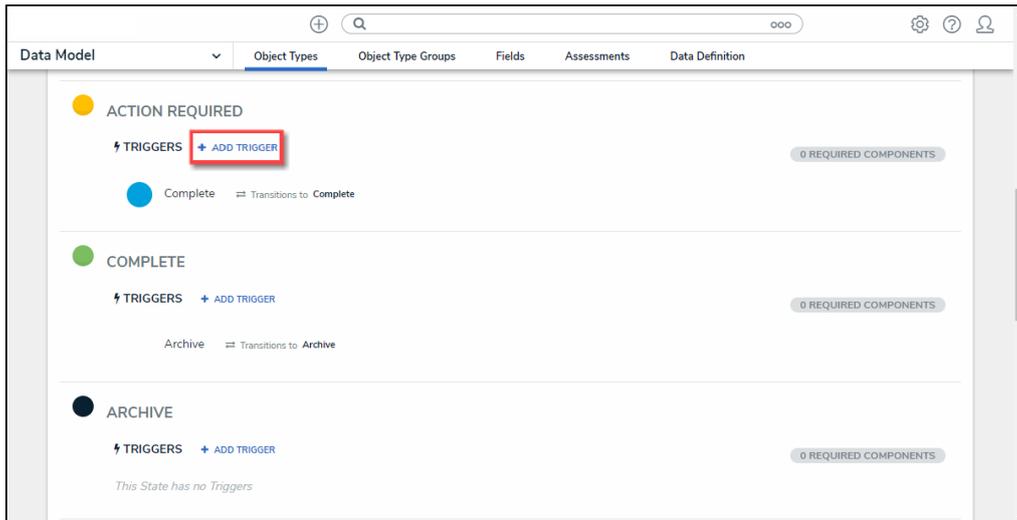
+ Add Triggers Link

> **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.
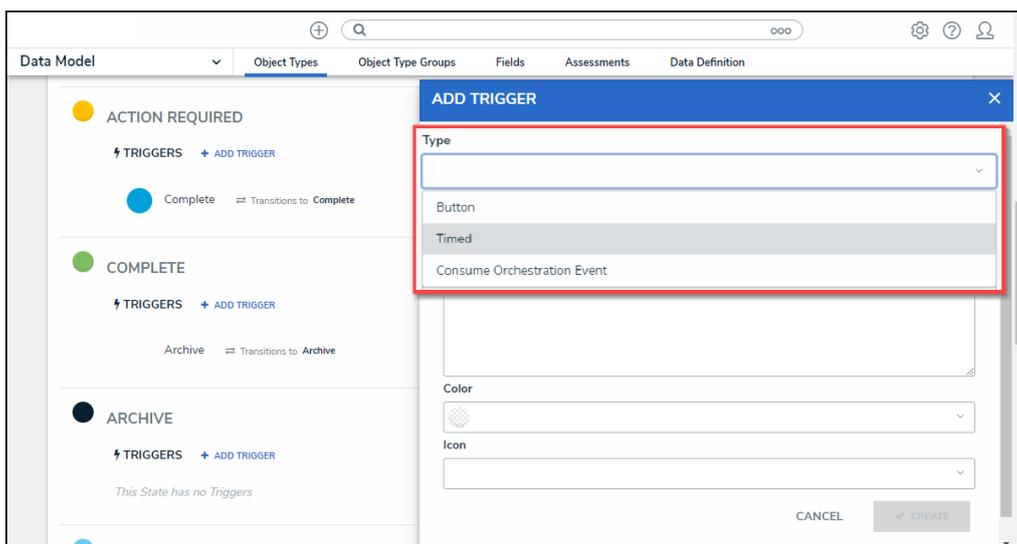
Type Field

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.
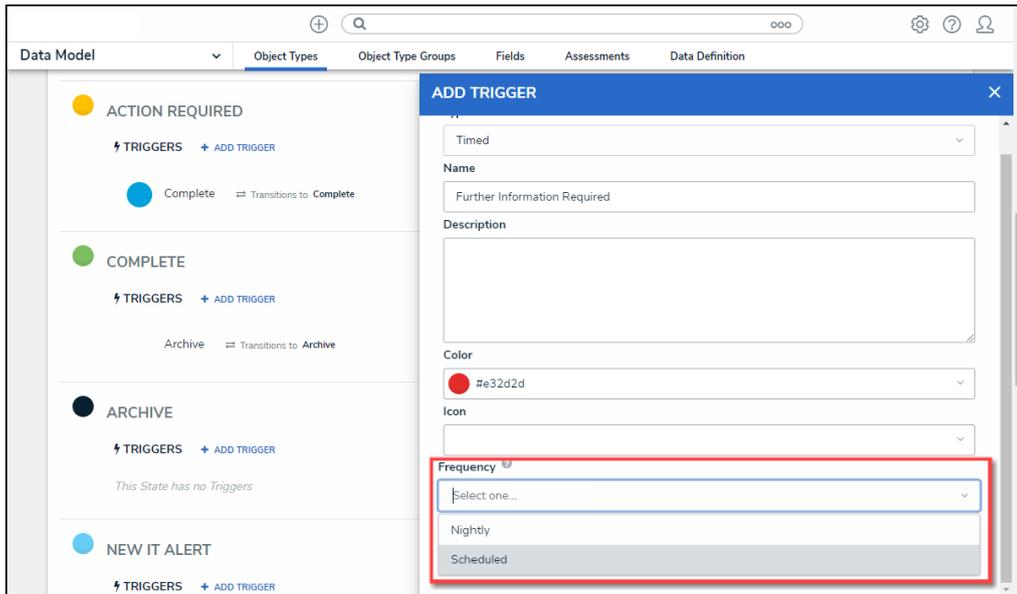
Frequency Field

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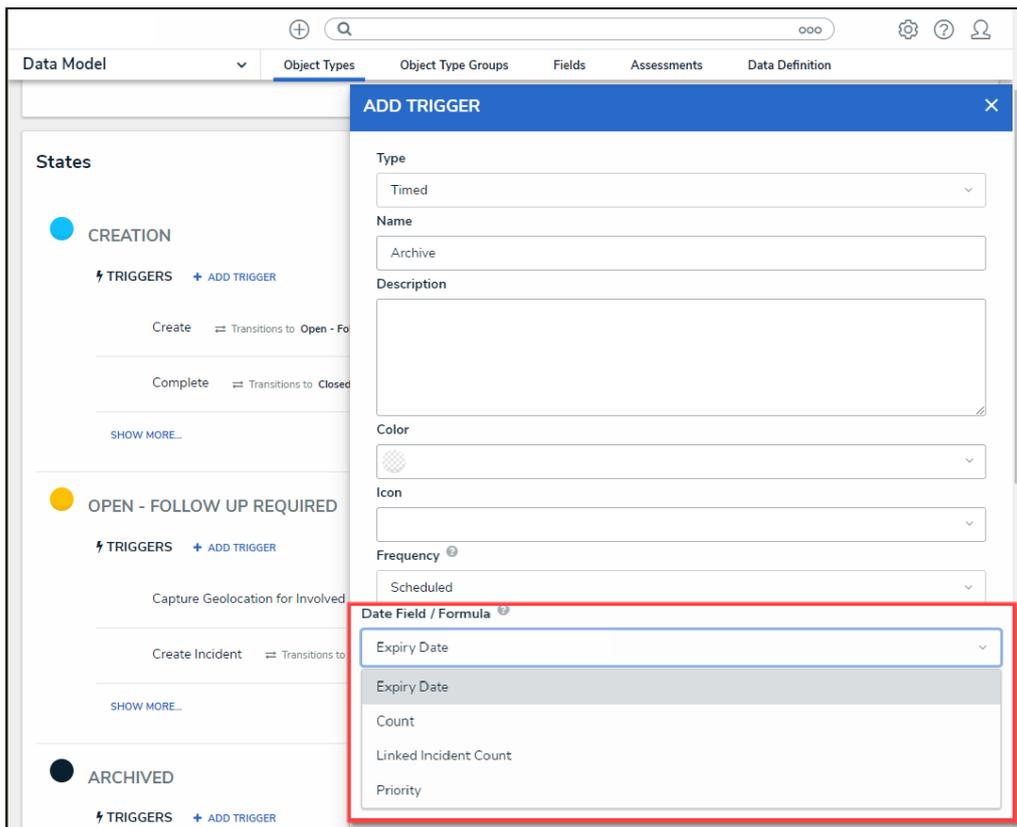
Date Field/Formula Field

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