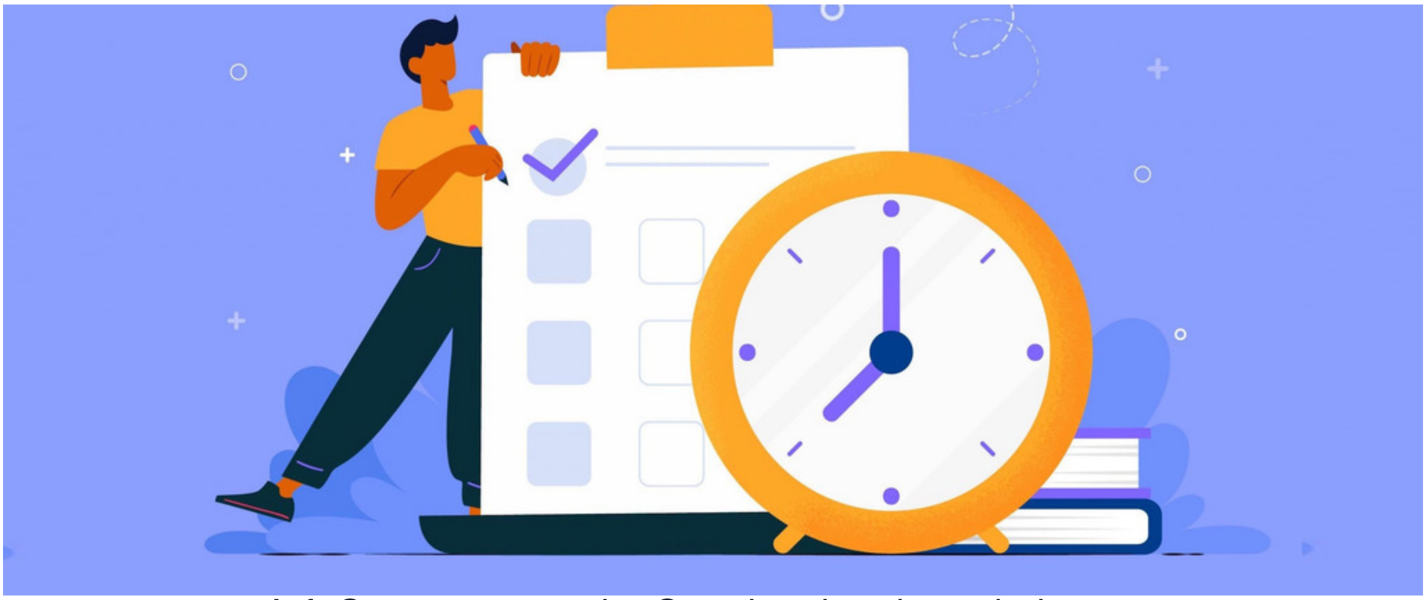
Link to article: https://discover.claromentis.com/knowledgebase/articles/867



# InfoCapture scenario: Creating time-based triggers

## Introduction

In this guide, we will give you step-by-step instructions on how to create a notification trigger that is attached to a time-based condition set.

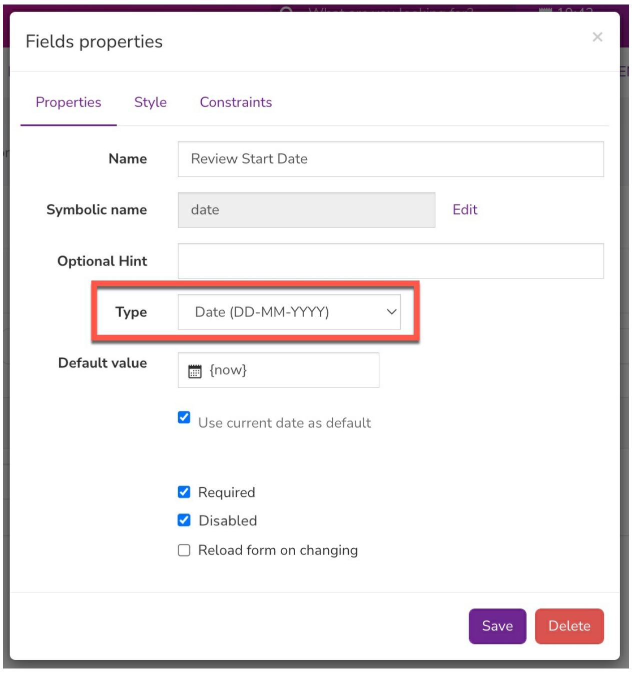
A time-based trigger can be used for various scenarios. For example, you may need to send a notification X days BEFORE or AFTER or ON a specific DATE. Or there may be an additional condition where a notification has to be sent X days after a ticket has remained with the same Ticket Handler or Status.

For this scenario, we will set up a trigger for when the ticket has been submitted but not assigned to a ticket handler after X number of days.

Follow the 9 steps below to set up time-based triggers

## Create a field

1. To start, add a 'Date' field to your InfoCapture form.

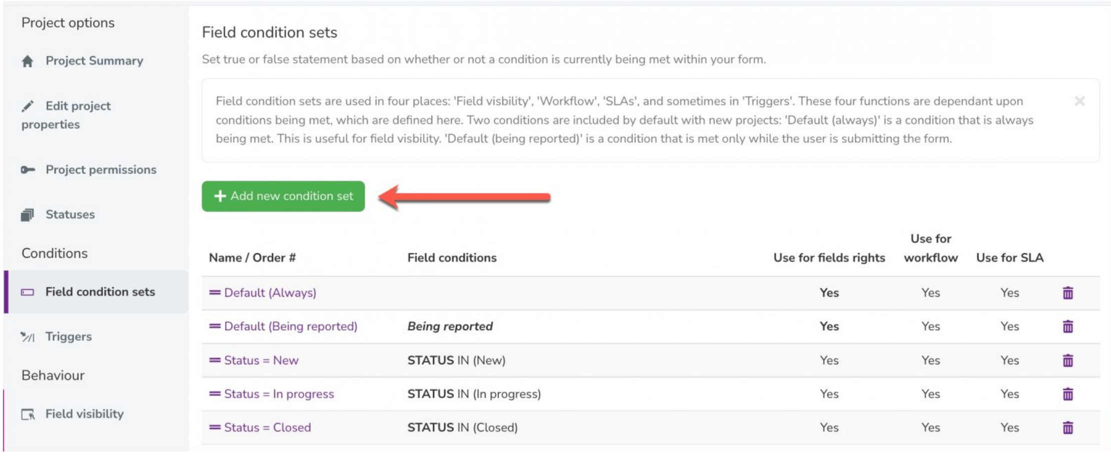



You can configure the field to default to the' Current date' or leave the default value -empty- so users can manually select the date.

For this example, we will have the field default to the current date in order to capture the date when the ticket was submitted.

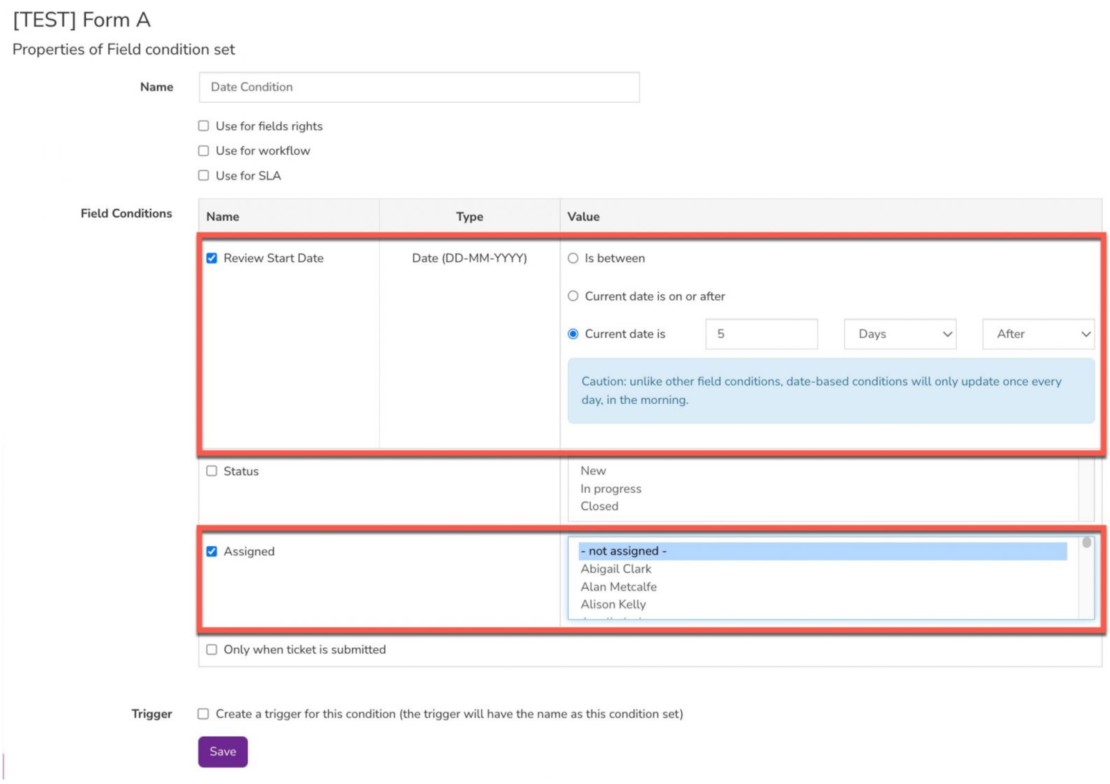
# Create a condition set

2. Next, create a field condition for the Date field.




3. Define the rules for the Date field.

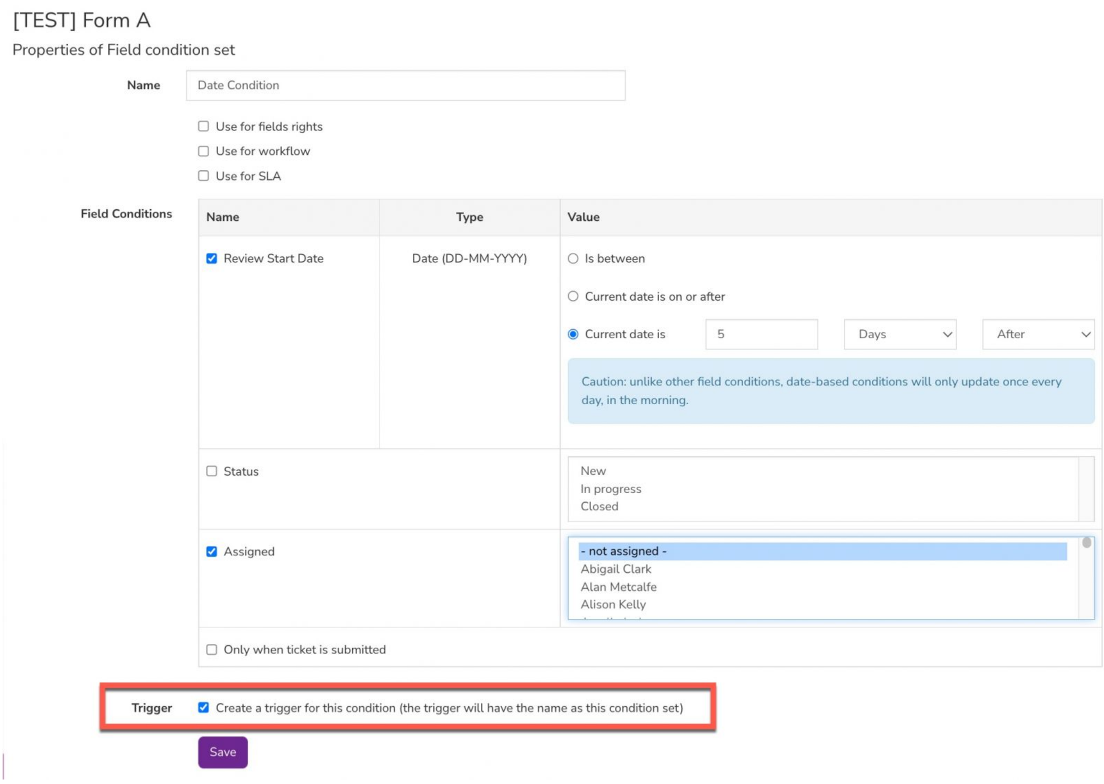
In this example, the rule is set for (1) the Date field to apply after 5 days from the current date AND (2) the Assign To field for ‘Unassigned’.




The above settings indicate that this condition will only apply when both rules are met. The condition set will not apply when only 1 of the 2 of the rules is met.

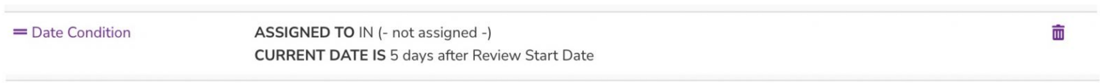
**Please note:** Unlike other field conditions, date-based conditions will only update once every day.

4. Make this condition set a Trigger by checking the following option.




Selecting the ‘trigger’ checkbox will automatically create a trigger that is directly matched to the condition set you have created.

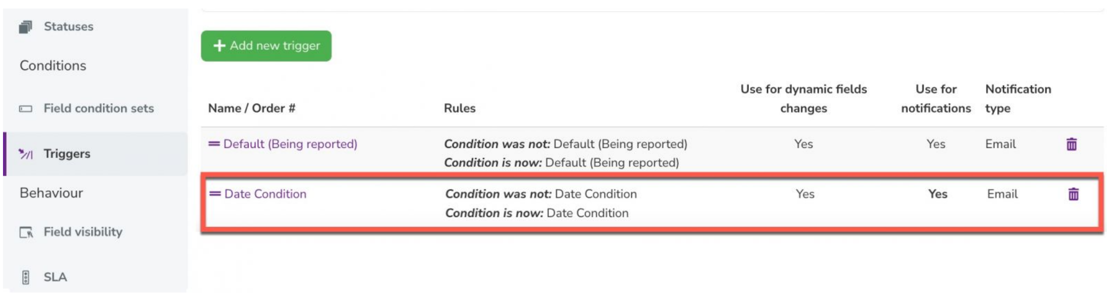
5. Save the condition set.




Upon saving the condition set, you will see the new field condition outlining the rules you have configured.

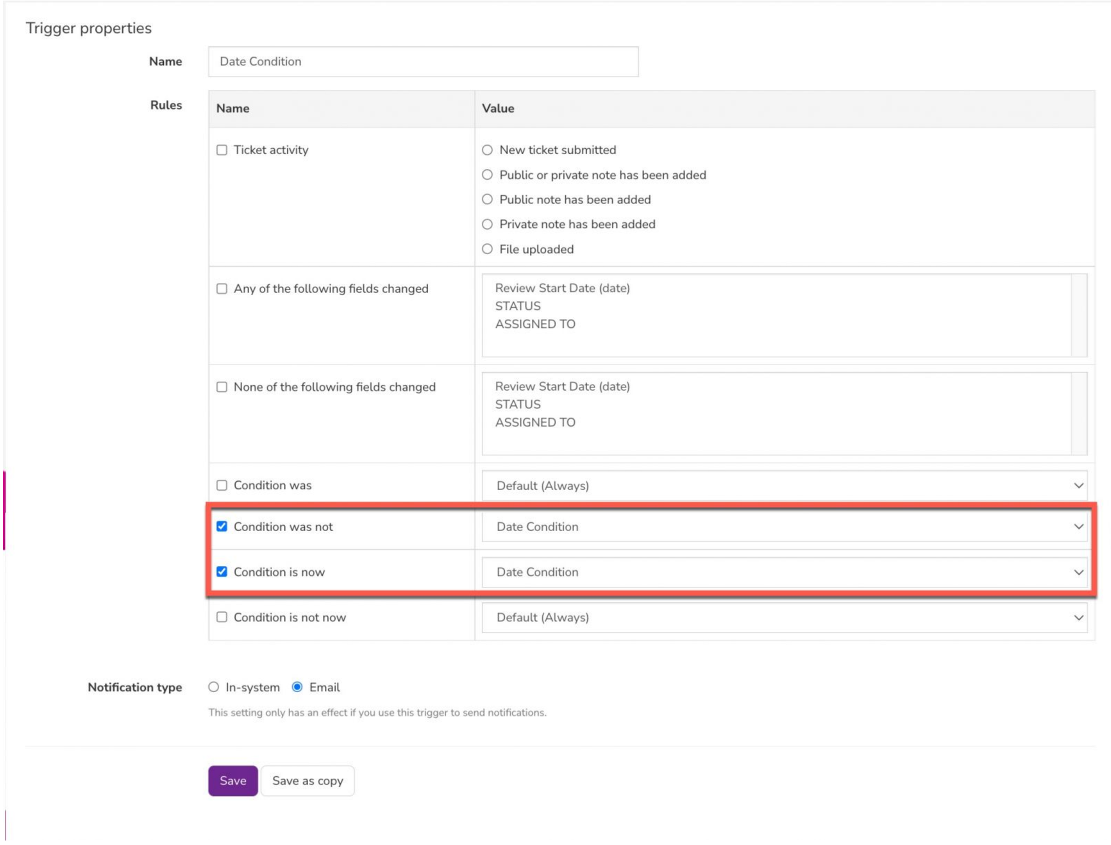
# Confirm the trigger

6. Head to the Triggers section to find the new trigger that was created from the condition set.




7. Click into the trigger where the following settings should already be in place.

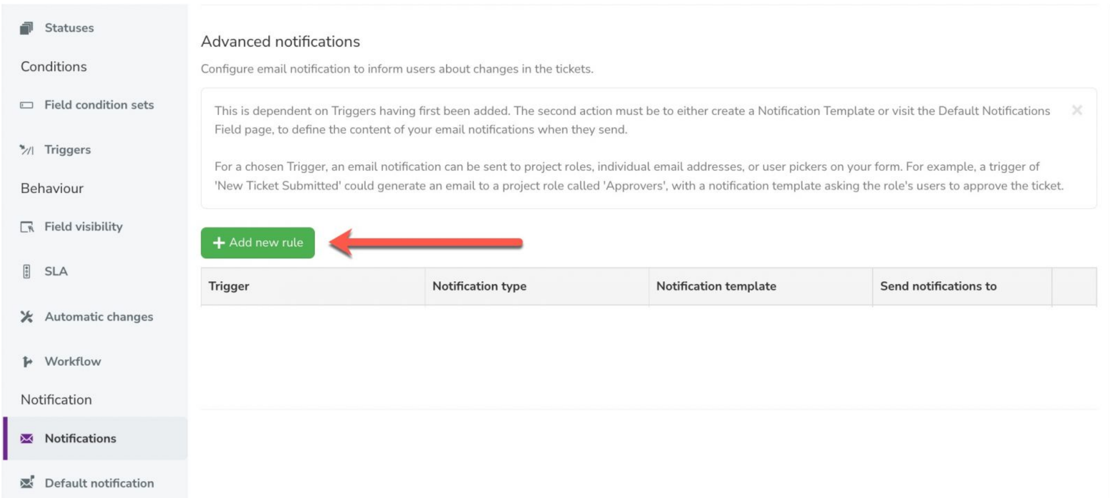
No further changes will be required.




If you wish, you can change the Notification type to either 'Email' or 'In-system' notification.

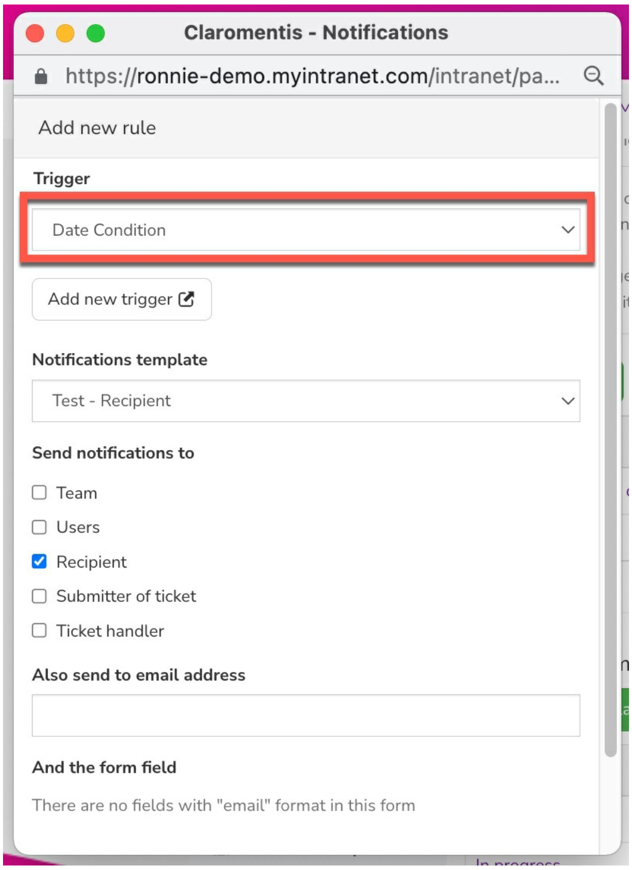
# Create a notification

8. Create a notification rule for the Date field trigger.



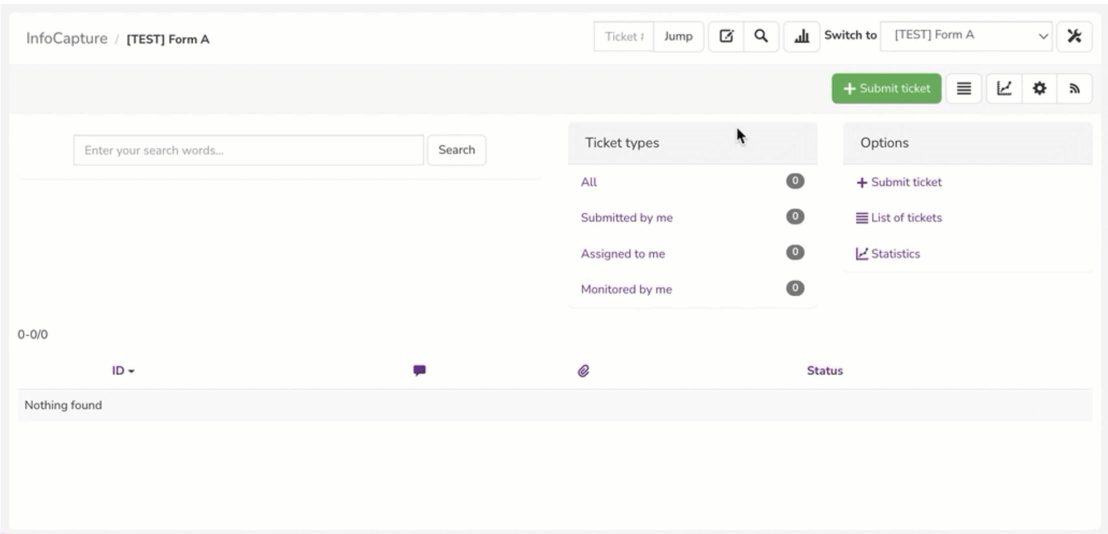

9. Select the Trigger for the notification. Ensure you also select the relevant Notification Template and notification recipient(s).

In this example, I have selected a custom notification template and the Project role: Recipient to receive the notification when this trigger is met.




## Submitting tickets

When tickets are submitted, the Date field will auto-populate with the present date.




A notification will now be generated after 5 days from the submission date AND if the ticket has not yet been assigned a ticket handler.

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Last modified on 30 November 2023 by Hannah Door

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