



# **BLUEPRINT TRIGGERS USER GUIDE**

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# Overview

An important part of SimplyCast Blueprint is the flexible Blueprint Triggers toolset, which allows users to trigger other parts of the use case by managing and updating conditional information. This toolset can be accessed in the dropdown menu on an entity-by-entity basis. Once you have clicked the downward arrow to the right of "View Data", you can click "Triggers" to access the Blueprint Triggers Dashboard.

Please note that operating Blueprint triggers requires some prior knowledge of the Blueprint application's core functionality. Therefore, we highly recommend reading the SimplyCast Blueprint Core Guide before engaging with the Triggers guide. You may also want to review the Blueprint Form User Guide.

View
Share
Edit
View Updates
Edit Icon Filters
Delete
Reports
Forms
Triggers
Create Instance Dashboard

### **Triggers Overview**

Entities > Testing Entity > Triggers				
🗎 Go to Repeating Trigger Manager 🛛 + Create Trigger	τ	Filter	Search trigger names	Q
Created on Sep 27th, 2024 1:03 PM.			Edit	•
Dieplaving 1, 1 of 1   Showing 10   Prev 1 Navt   Entering Go				

Once you have arrived on the Blueprint Triggers Dashboard, you will be able to do several things, including:

### Create a New Trigger

The green "Create Trigger" button at the top of the Triggers Dashboard allows you to create a new conditional trigger.

Clicking this button will cause a sidebar to appear where you can configure the new trigger. This is also how you will create Repeating Triggers, which cannot be created from the Repeating Trigger Manager.

### View the List of Triggers

Below the "Create Trigger" button is a list of all triggers that have been created. The most recently modified trigger is at the top by default. If there are no triggers listed, none have been created yet. You can see the name of the trigger and when it was created.

# Search for Triggers

#### To search for a trigger in the list:

- Select the search box in the top right-hand corner of the page above the list of triggers.
- Type in the text you would like the system to search for.
- The list of triggers will automatically filter to match the text.

### Filter Triggers

▼ Filter	Search	Q
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#### To filter your list of triggers:

- Click the gray "Filter" button located next to the search bar. A dropdown menu will appear.
- The first field lets you filter triggers by their date of creation by configuring a trigger creation date window.
- In the second field you can filter your triggers by the date they were last modified by choosing a specific date window.
- In the third field set, you can choose triggers that have a specific status. Available statuses are "Draft" or "Published".
- Finally, you can filter by the Owning User—that is, the user who owns the trigger.
- In the final field set, choose a date range within which to see the triggers that were most recently modified. Click on the "Click to Set Date" fields in this field set to open a calendar dropdown and select your desired dates and times.
- Click the blue "Apply" button at the bottom of the sidebar to filter your triggers or click the gray "Clear" button to close the sidebar without implementing the filter.
- When a filter is applied, the formerly gray "Filter" button will now appear green. To remove the filter, click this button again and click "Clear".

# Go To Repeating Trigger Dashboard

		τ	Filter
Status			
Published			•
Filter by owner			
Search users			•
Created on			
Click to Set Date	То	Click to Set I	Date
Last modified			
Click to Set Date	То	Click to Set [	Date
		Clear or	Apply

Click on this button to open a separate dashboard that displays currently repeating triggers. You can view reports for the repeating triggers while they are in progress, edit the trigger, or stop the repetition from this dashboard. You can also filter triggers to find a specific trigger.

Entities > Testing Entity > Scheduled Repeating Triggers							
60	参 Go to Trigger Dashboard						
	🖉 View Trigger Report 🕼 Edit Trigger 🗎 Stop Selected						
	Trigger	Instance	Interval	Execution Count	Next Run Time		
	Trigger Trigger Testing	Instance fa5e9fc9-d948-4117-9432-c73985262c5a	Interval 5	Execution Count	Next Run Time Nov 19th, 2024 3:26 PM		

Clicking "Go to Trigger Dashboard" will return you to the main Trigger Dashboard.

# Edit Trigger Details

On the Blueprint Triggers page, you can view the contents of your chosen Blueprint trigger by clicking on the blue "Edit" button located across from its name. You will then be directed to the editor where you can make changes to your trigger on several levels.

The first page that you will reach upon clicking "Edit" is the Trigger Conditions page, at the top of which you will see a set of options titled "Trigger Type".

## Trigger Type

Trigger Type settings determine what can fire the trigger. These settings include:

- Blueprint Entity API Called: Activates the Trigger when our API is used to call the Blueprint Entity to which the trigger is attached.
- Changed By Another Blueprint Trigger: Activates the Trigger when an instance of the chosen entity is altered by another active Blueprint Trigger.
- Blueprint Form Submitted: Activates the Trigger when a Blueprint form is filled out, and has two options:
  - All Forms: Trigger the Blueprint when any form related to the entity is filled out.
  - Specific Form: Trigger the Blueprint when a specific form related to the entity is filled out.

### **Trigger Conditions**

Trigger conditions are the specific conditions that need to be met for the trigger to activate. These circumstances can be broken up into two categories:

The first dropdown action determines how the conditional clause identifies relevant information. The action can include:

- Created with field value: This clause is true when a new instance is created with a specific value in a specific field. Updates will not be examined by this.
- Instance created: Fires the trigger each time a new instance is created for the chosen Entity.
- Changed field to value: Fires the trigger when a specific Entity field is changed to a specific value.
- Changed field from value: Fires the trigger when a specific Entity field is changed to anything from a specific value.
- Current field value: Examines the field at the moment of a potential trigger. It only cares if the current active value meets the clause parameters and will not examine the field

for changes. To have the clause examine the field for changes, use "Changed Field" actions as seen above.

- Changed field to any value: Fires the trigger when a specific Entity field is changed to any value.
- Instance changed: Fires the trigger when a specific Entity Instance is updated.

Triggers will then either affect the whole instance or require a field to be attached to them, which the trigger will monitor for changes. If a particular field is designated, further information will be required to specify the conditions that the field must meet, such as "field contains" "Does not contain" and so on.

Multiple conditions can be set at one time, and depending on user input, these conditions can be connected to the original condition as an "AND" statement, or alternate options as an "OR" statement.

## **Trigger Actions**

Trigger actions are functions that the user wants performed when the trigger is fired. These actions will typically involve sending messages or updating information. Please note that triggers are performed in order, so you may need to re-order them for the desired results.

The Trigger Actions available to the user are as follows:

- Send Alert
- Teleconference
- Send Command Hub Notification
- Update Instance Share
- Update Instance Share from Look Up
- Remove Instance Shares
- Remove Instance Shares from Look Up
- Update Instance
- Create File
  - o ICS
    - o CSV/XLSX
    - o PDF
- Trigger a 360 Flow

These Actions can be subdivided into three main groups:

- Channel Actions: Perform a function such as sending an alert message or a notification.
- Information Actions: Update or alter the instance information as needed.
- File Actions: Compile information into a downloadable file.

#### **Channel Actions**

Channel Actions allow users to trigger a message or the functionality of another channel:

- Send Alert: Triggers an alert to be broadcasted to specific contacts or lists using any or all of our communication channels. Guidelines on creating an alert can be found in the SimplyCast Alert User Guide.
- Teleconference: Triggers an instant teleconference meeting where contacts can coordinate and/or meet with one another due to the trigger being fired. Guidelines on creating a teleconference can be found in the SimplyCast Teleconference User Guide.
- Send Command Hub Notification: Sends a notification to a designated Command Hub dashboard, and allows the user viewing it to perform or activate further Actions. More information on configuring a Command Hub Notification can be found below.
- Trigger a 360 Flow: Starts a 360 automation campaign as soon as the trigger is fired.

#### Command Hub Notification

Creating a Command Hub Notification is among the more complex Actions that can be taken in Blueprint Triggers, and as such requires elaboration on creation.

The settings for a Command Hub Notification are as follows:

#### Content

- Merge Tags: After selecting a merge tag from the dropdown, you can click either "Add to Title" or "Add to Message".
- Icon: Use the entity icon for the notification or use a custom icon. For information on creating custom icons, please refer to the Icon Manager User Guide.
- Title: Give the notification a title. This is the "Title" referred to in the Merge Tags section.
- Message: Add a message to the notification. This is the "Message" referred to in the Merge Tags section.

#### Expiry Date

- Amount: Numerically input the amount of time for which you want the notification to be visible.
- Period: Choose the qualifier for the number in Amount. You can set the period to be in minutes, hours, or days.

#### Action Buttons

Clicking "Add Action Button" will create a row underneath titled, "Unconfigured". Click the "Edit" button on the right to begin configuring the action button.

The action button will allow you to perform two functions:

- Go to Command Hub Dashboard: Navigate to a dashboard that is not associated with a Blueprint Instance. For more information on the different types of Command Hub dashboards, please refer to the Command Hub User Guide.
- Go to Command Hub Instance Dashboard: Navigate to a dashboard that is explicitly tied to a Blueprint Instance. For more information on the different types of Command Hub dashboards, please refer to the Command Hub User Guide.

#### Recipients

The Recipients section will allow you to choose users and user groups, or to use the lookup tool to determine which users will see the notification.

#### Information Actions

Information Actions are Actions that alter the information on the Instance such as updating or removing information. These actions include:

- Update Instance Share: Alter existing shares or create additional shares for a particular Blueprint instance. This update can be activated when the trigger is, or when a related field is activated via Look Up. Please note that this process is purely additive, meaning you cannot delete a share using this setting. That appears later in the list of Information Actions.
- Update Instance Share from Look Up: Performs the same functions as Update Instance Share, but does so via Look Up Instead, allowing the user to filter specific triggers.
- Remove Instance Shares: Remove all instance shares.
- Remove Instance Shares from Look Up: Remove specific instance shares based on the Look Up tool.
- Update Instance: Change details about the instance, including (but not limited to) the owner, values in the various Entity fields, and/or information related to the creation and modification dates. Several fields can be updated at once.

#### File Actions

File Actions provide report data as a file output that can be plugged into a third-party application for review. These Actions allow the export of data to ICS, CSV/XLSX, or PDF file formats. To configure these Actions correctly you will need to adjust the following settings:

#### ICS File

- Unique Identifier: Choose a field to be the unique identifier by which new entries are determined in the document.
- Summary: Name the Calendar entry for ICS files.
- Start Date: Choose the starting date for the data that you want to collect. This can be based on Date Created, Date Modified, or a date field on the Entity.
- End Date (Optional): Choose a closing date for the window of data you want to collect. This can be based on Date Created, Date Modified, or a date field on the Entity.
- Select Save Destination: Determine where in the file explorer you want your file saved for download. This will not determine where on your computer the file will be saved to but allows you to organize your downloads in the app.
- Build File Name: Determine what the default file name will be when downloaded.
- File Name Example: Check this field to ensure that you have built the correct file name.
- Description: Adding a trigger description will help other users identify what the trigger does.

#### CSV/XLSX:

- Select Entity Report: Using the dropdown, choose the Entity you want to save a CSV/XLSX for. From the subsequent dropdown, select the report you want compiled in a spreadsheet file.
- Select File Type: Determine which of the two spreadsheet file types you want.
- Select Save Destination: Determine where in the file explorer you want your file saved to for download. This will not determine where on your computer the file will be saved but allows you to organize your downloads in the app.
- Build File Name: Determine what the default file name will be when downloaded.
- File Name Example: Check this field to ensure that you have built the correct file name.
- Description: Adding a trigger description will help other users identify what the trigger does.

PDF:

- Build Content: Opens an editor where users can create a plain text PDF. There is a section below the editor to insert CSS code to change the appearance of the PDF.
- Select Save Destination: Determine where in the file explorer you want your file saved for download. This will not determine where on your computer the file will be saved but allows you to organize your downloads in the app.
- Build File Name: Determine what the default file name will be when downloaded.
- File Name Example: Check this field to ensure that you have built the correct file name.
- Description: Adding a trigger description will help other users identify what the trigger does.

These files are stored in the file manager and can be accessed by going to your profile and clicking on "File Management".

#### Trigger a 360 Flow

This Action type has its own section due to the complexity of 360, and the fact that it doesn't really fit into any one category. A 360 flow is a versatile tool that you can learn more about from the SimplyCast 360 User Guide.

The important thing to know here is that this trigger, when fired, will begin an automated communication flow that can be:

- As simple as: Timer, Message, Follow up message for recipients that didn't open the first one OR
- As complex as a full conditional schema designed to walk the recipient through a natural disaster or emergency.

Outside of a description for the sake of the user attaching the Trigger to the Flow, there are no settings to be configured.

Once an action has been created using the green "Create Action" button, you can click "Edit" on the right side of the screen to begin editing the Action. Either edit the action itself or click a button to edit the Action item more specifically. For instance, if I create an Alert, I can add a description to the Alert, define if it should continue on a failure, or configure the alert details by clicking "Configure Alert" in the upper right.

If you disable "Continue on Failure", subsequent actions will be halted in the event of an error, as per the tooltip seen when mousing over the option.

Choosing to configure the Action item (Alert, Teleconference, and so on) will take you to the workflow for creating that item. Please see the associated user guide for information on how to set these items up. Once you have completed the Action item, you should be returned to the Blueprint Trigger dashboard.

If you are instead editing an Action item that updates information or uses Look Up, there will be other options available to you, which are as follows:

## **Repeating Trigger Settings**

Repeating triggers fire automatically on a timed interval. You can structure your repeating triggers by modifying the following settings:

Repeat Actions Every: The text box here is for number input, while the dropdown provides context to those numbers. For example, if I input 15 into the text box, I can then choose seconds, minutes, hours, or days.

First Trigger Execution: Determines how to handle the repeating trigger after it is fired. You can fire immediately, have the trigger wait for a period after the conditions are met, or activate relative to a field value on the Instance.

Continue Conditions: The conditions under which the trigger will repeat itself. You can stop after a set number of repetitions or choose to repeat only while specific conditions are being met. For this, you will also need to provide conditional logic using the same dropdowns as when you created the trigger.

Note: The first dropdown is no longer available, as you are comparing to a specific point in time, rather than a whole change set.

### Crosscheck

Once all your Trigger settings have been arranged as needed, you can click the "Next" button at the bottom right of the screen. This will take you to the crosscheck screen. This screen identifies issues with the triggers you've created and tells you if it is possible to publish them. Crosscheck operates on a simple green, yellow, and red system.

Green items can be published without problems, yellow items may have some issues and could probably be refined slightly, and red issues will prevent the triggers from being published at all.