



Triggers for Quick Base



Automate workflow from your Quick Base application

Highlights of Triggers for Quick Base

- ✓ **Intuitive interface** to design, build and manage trigger configurations
- ✓ Design your workflow with one or more actions that can **search, add, update** or **delete** records from one or more Quick Base applications
- ✓ **Test** your workflow/trigger and view the test results from the web portal
- ✓ Deploy/execute the trigger with simple email notification based upon a triggering event from a table in your Quick Base application
- ✓ **Schedule** a trigger to be executed at a specific time of day/week/month
- ✓ **Monitor** your trigger activity from our web portal, from your Quick Base application's activity table or with activity emails.
- ✓ Process **multiple records** from your Quick Base application with Grid Edit or use a report of the records to be processed with scheduled triggers
- ✓ **Duplicate trigger** with actions or copy trigger in a sandbox mode to modify the existing trigger

Triggers Dashboard

Trigger ID	Trigger Name	Created Date	Created By	Status
675	Chris Test Trigger	06/28/2017	Christine	Active
680	Update Date	01/05/2017	Christine	Inactive
684	Add Parent and Grandparent Records	03/30/2017	Christine	Inactive
745	Update Status using Courier	01/18/2017	Christine	Inactive
849	Test Update Info from another table	03/31/2017	Christine	Inactive
887	Chris Test App - Update Status using Email Address to Search	05/10/2017	Christine	Inactive
947	Checklist Processing for Barings	06/15/2017	Christine	Inactive
1070	Test Sequence No	10/27/2017	Christine	Active

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Triggers for Quick Base



Trigger actions

- ✓ Manage your actions for each trigger from the **Trigger Action Dashboard**
- ✓ Add one or more actions to a trigger
- ✓ The actions will be executed in the order you have added them
- ✓ Available actions include:
 - Add records
 - Update one or more records
 - Search records
 - Repeat Action (Loop through result set returned from search action)
 - Delete record(s)
 - Conditional actions

Trigger Action Dashboard

Move	Operations	Action Order	Action Name	Action Type	Connection Type	Description
		1	Add Estimate	Add Record	QuickBase	
		2	Add task	Add Record	QuickBase	Adds Budget to Task...
		3	Add Task for Budget Category 1 if p...	Conditional Action	QuickBase	
		4	Add Budget 1	Add Record	QuickBase	
		5	Copy of Add Task for Budget Categ...	Conditional Action	QuickBase	
		6	Copy of Add Budget 1 of the action	Add Record	QuickBase	

Action field mapping

FIELDS TO MAP

AUTOMATION TASKS TABLE FIELDS Add Fields

Field: Task name
Value: A-Z Add a tag

Field: Related Automation
Value: 0-9 **Action Order # 1** Add a tag

Mapped fields
Task name Related Automation Budget

APPLICATION DATA

PRIOR ACTION OUTPUT
Action Order #s

UPDATES TABLE FIELDS SELECTED IN TRIGGER

FUNCTIONS

- Add
- Subtract
- Multiply
- Division
- Add Days ^{-D}
- Subtract Days ^{-D}
- Subtract Month ^{-M}
- Add Month ^{+M}
- Add Weekdays ^{+WD}
- Subtract Weekdays ^{-WD}

✓ Map fields from a selected table, search action results, prior action output or application data in field mapping for any action

✓ Use functions such as add, subtract, multiply, divide, add days, subtract days, add months, subtract months, add weekdays, subtract weekdays in field mapping

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