

Triggers Operation

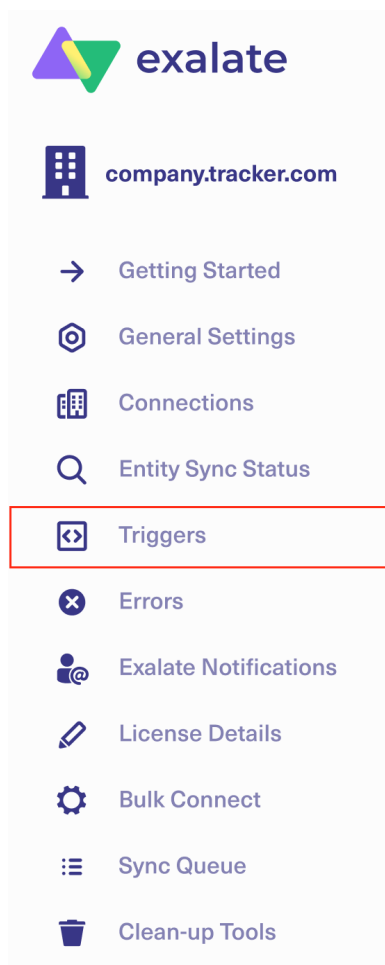
Last Modified on 06/30/2025 11:04 am EDT

Triggers in Exalate allow you to start synchronization automatically.

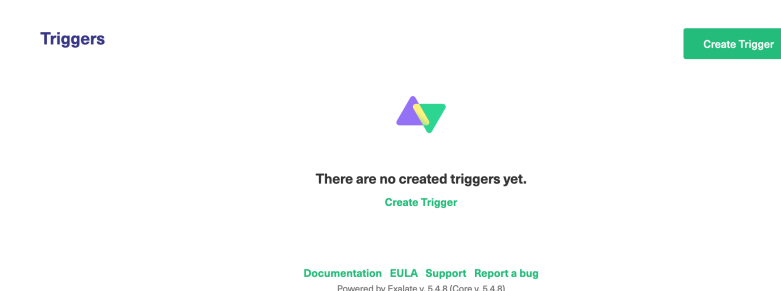
How to Create a Trigger

To create a trigger, please follow the steps:

1. Navigate to the **Triggers** tab in the Exalate admin menu



2. Click **Create Trigger**



3. Select the type of entity you want to synchronize. If there is only one option available, the dropdown feature is disabled.

Note: If you want to synchronize multiple entities, you need to create separate triggers for every entity type.

4. In the **If** field, enter the desired filter to decide which issues get automatically synced to the other side.

Use the platform search syntax to specify the filter query.

Create Trigger

Specify a search query using GitHub advanced search syntax to synchronize issues automatically. All issues that fit the query will be triggered for synchronization. [Find more details.](#)

Trigger will apply to selected entity type*

Issue

If*
Use GitHub advanced search syntax to specify the query. Make sure to include GitHub repo or org value. Check out our [documentation](#) for more details.

is:issue is:open label:bug repo:Exalate-team/test

Then sync with connection*

Select a connection

Notes

☐ Activate trigger

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5. Select the Connection you want to sync with, **Then sync with the connection** list.

6. Optionally, input information to keep a reference for the trigger in the **Notes** field.

7. Check the **Activate trigger** box to activate the trigger.

8. Click **Create** to complete the process.

Note:

- To start the synchronization, you need to **Bulk Exalate** on the trigger. It helps to synchronize all issues that fit trigger search queries. For more information about this topic, please read [how to bulk Exalate entities](#).
- To stop the synchronization, you need to **Bulk Unexalate** the trigger. It helps to stop the synchronization of all issues that fit trigger search queries. For more information

about this topic, please read [how to bulk unexalate entities](#).

What if the connection used for a trigger has been disabled?

Whenever a connection used in a particular trigger is disabled, Exalate still collects all the changes that are related to issues that are under sync using that connection.

The changes are queued as sync requests. Once the connection is reenabled, sync transactions can continue from the point where they have been paused.

What if the trigger has been disabled?

Disabling the trigger makes Exalate ignore the create/update events for the issue that matches the query.

Triggers in Jira

Create Trigger

Specify a JQL query to synchronize issues automatically. If the issue fits the query, it will be synced on the create/update issue event. [Find more details](#).

Trigger will apply to selected entity type* ⓘ

Issue | ▾

If ⓘ *

project = BLUE AND labels = sync

Then sync with connection*

Select a connection | ▾

Notes

Active?



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You can start issue synchronization automatically according to a specified search query with the help of a trigger.

If the issue fits a search query it is triggered for synchronization automatically. Once someone updates the issue that is under sync, the changes are synchronized automatically.

Check the example of the [Jira Query Language \(JQL\)](#) trigger query below.

When you create an issue in the **project = BLUE** with **labels = sync** issue is synchronized automatically.

Also, the same trigger starts the synchronization if any issue in **project BLUE** has been updated with the **label sync**.

```
project = BLUE AND labels = sync
```

Using saved filters:

- You can use JQL saved filters in trigger configuration. Please make sure that the filter is shared with the [proxy user](#).
- Filters can be shared with other users via user groups, projects, and project roles. They can also be shared globally. Any filter that is shared is visible to users who have the **Administer Jira** global permission.
- Use filter ID (**filter = 10500**) or name (**filter = "My filter"**) to configure a trigger

Note: Changes due to compliance with GDPR

JQL queries containing user identifiers such as username, display name, or email stop working starting from the 29th of March due to [Atlassian's compliance with GDPR](#).

Update your JQL query to [use account IDs](#) instead. Find more details in the [REST API migration guide and deprecation notice - userName and userKey](#). You can get the user account IDs with the help of [JIRA Cloud REST API](#).

Examples:

JQL with userNames

```
issuetype = Bug AND assignee in (mia) AND reporter in (alana) order by lastViewed DESC
```

JQL with account IDs

```
issuetype = Bug AND assignee in (abcde-12345) AND reporter in (abc551-c4e99) order by lastViewed DESC
```

Triggers in Azure DevOps

Create Trigger

Specify a search query using Azure DevOps advanced search syntax to synchronize work items automatically. All entities that fit the query will be triggered for synchronization. [Find more details](#).

Trigger will apply to selected entity type* ⓘ

Work Item | ▾

If*

Use Azure DevOps advanced search syntax to filter work items for synchronization.

[Work Item Type] = 'Task' and System.TeamProject = 'ProjectName'

Then sync with connection*

Select a connection | ▾

Notes

☐ Activate trigger

Cancel

Create

Triggers use a WIQL (Work Item Query Language) or the Azure DevOps Search Syntax to search Azure DevOps work items.

Use the [Work Item Query Language Syntax](#) to create a search query.

You only need the conditions found in the WHERE clause of the WIQL to filter the work items. Check some examples below:

Synchronize all work items with type 'Task' from a project 'ProjectName'

```
[Work Item Type] = 'Task' AND System.TeamProject = 'ProjectName'
```

Important: Starting from Exalate for Azure DevOps version 5.4.0, make sure to indicate the project name as `System.TeamProject = 'ProjectName'`

Sync work items from project 'BatCave' with type 'Task', assignee 'Bruce Wayne', and status 'Doing'

```
[Work Item Type] = 'Task' AND  
[Team Project] = 'BatCave' AND  
[System.AssignedTo] = 'Bruce Wayne' AND  
State = 'Doing' AND  
[Area Path] = 'BatCave\Operation' AND  
[System.Tags] Contains 'azure'
```

Sync all work items that have a custom field with the title 'MyCustomTextField' and value 'Sonic'

[Custom.MyCustomTextField] = 'Sonic'

Sync all work items created 2 days ago

[System.CreatedDate] = @ today- 2

Note: You can specify either the reference name or the friendly name. The following examples are valid WIQL syntax:

- Reference name with spaces: [System.AssignedTo]
- Friendly name with spaces: [Assigned To]

Names without spaces don't require square brackets: ID, Title, State

Triggers in GitHub

Create Trigger

Specify a search query using GitHub advanced search syntax to synchronize issues automatically. All issues that fit the query will be triggered for synchronization. [Find more details.](#)

Trigger will apply to selected entity type* ⓘ

issue | v

If*

Use GitHub advanced search syntax to specify the query. Make sure to include Github repo or org value. Check out our [documentation](#) for more details.

is:issue is:open label:bug repo:Exalate-team/test

Then sync with connection*

Select a connection | v

Notes

☐ Activate trigger

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Use the [GitHub advanced search syntax](#) to specify the query.

Warning: In order for the trigger to be saved, you MUST specify at least one repository or organization in the search query. If you do not do this, it is still possible to save the trigger, but it doesn't work. This is a known issue and we are working to address it so a warning is displayed. Here are some examples of the queries to add:

```
is:issue org:Organization
```

```
is:issue is:open label:bug repo:username/test
```

```
is:pr is:open repo:username/test
```

Below you can see some more examples to specify in the query:

Synchronize issues in status Open with label bug from the repo test

```
is:open label:bug repo:username/test
```

Synchronize pull requests in status Open

```
is:pr is:open
```

Note: If the search query contains whitespace, you need to surround it with quotation marks. Check the example below:

Synchronize issues with a label bug fix

```
label:"bug fix"
```

Synchronize pull requests in status in progress


```
is: "in progress"
```

Triggers in Zendesk

Create Trigger

Specify a Zendesk search query to synchronize tickets automatically. All tickets that fit the query will be triggered for synchronization. [Find more details.](#)

Trigger will apply to selected entity type* 


ticket | 

If*

Use Zendesk search syntax to filter tickets for synchronization.

type:ticket status:open

Then sync with connection*

Select a connection | 

Notes

☐ Activate trigger

[Cancel](#)

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Use the [Zendesk search syntax](#) to specify the filter query. Below you can see an example

Zendesk search: sync issues of type ticket with status open

type:ticket status:open

Sync tickets with ticket type INCIDENT and priority Urgent

type:ticket ticket_type:incident priority:urgent

Triggers in ServiceNow

Create Trigger

Specify a ServiceNow search query to synchronize entities automatically. All entities that fit the query will be triggered for synchronization. [Find more details.](#)

Trigger will apply to selected entity type* ⓘ

incident | ▾

If*

Use search ServiceNow search syntax to filter issues for synchronization.

urgency=1

Then sync with connection*

Select a connection | ▾

Notes

☐ Activate trigger

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Use the [ServiceNow search syntax](#) to specify the filter query. Below you can see an example

ServiceNow search: sync incidents with urgency 1-High

urgency=1

Sync incidents that include "Test" in the description

short_descriptionLIKETest

Triggers in Salesforce

Create Trigger

Specify a search query using Salesforce advanced search syntax to synchronize entities automatically. All entities that fit the query will be triggered for synchronization. [Find more details.](#)

Trigger will apply to selected entity type* ⓘ

Opportunity



Use search query



If

Use Salesforce advanced search syntax to filter entities for synchronization.

Name = 'MyName'

Then sync with connection*

Select a connection



Notes

☐ Activate trigger

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Warning: Currently, it is not possible to create a trigger using a query with text area fields. Text area fields contain text that can be longer than 4000 bytes. Unlike string fields, text area fields cannot be specified in the WHERE clause of a queryString of a query() call. For more information on the limitation, please read [Field Types](#).

In Salesforce, you can select conditions to filter an object for synchronization. Depending on the entity type selected, you see different input fields.

Create Trigger

Specify a search query using Salesforce advanced search syntax to synchronize entities automatically. All entities that fit the query will be triggered for synchronization. [Find more details.](#)

Trigger will apply to selected entity type* ⓘ

Opportunity | ▾

Use search query ☐

Select conditions to filter Opportunity for synchronization:

Name	Description	Quantity	Next Step	
<input type="text" value="Name"/>	<input type="text" value="Description"/>	<input type="text" value="Quantity"/>	<input type="text" value="Next Step"/>	<input type="text" value="More"/> ▾

Note: Alternatively, you can enable **search queries**. Use [Salesforce Object Query Language](#) to specify the filter query.

Use search query ☒

If ⓘ

StageName = 'Prospecting'

Please, read the following search query examples for Opportunity:

```
StageName= 'Prospecting' AND Name like '%demo%'
```

This search query defines the Opportunity stage as 'Prospecting' and an Opportunity name that partially matches the word 'demo'

This search query defines an Opportunity's exact name as 'demo opportunity' and its order number - 123

Triggers in Freshdesk

Create Trigger

Specify the search query to synchronize entities automatically. All entities that fit the query will be triggered for synchronization.

*Trigger will apply to selected entity type ⓘ

ticket | ▾

If

You can use any valid query supported by the issue tracker to filter which entities will get automatically synced.

*Then sync with connection

Select a connection | ▾

Notes

☐ Activate trigger

Cancel

Create

You can configure a trigger by specifying field values, which are separated by “AND” or commas, to filter the relevant tickets

```
filter = new_and_my_open AND requester_id = 103099112292
```

OR

```
filter = new_and_my_open, requester_id = 103099112292
```

this query filters for tickets that are new, open and assigned to the user making the query, and have a requester with the ID 103099112292.

Filters

You can use all the fields supported by the List All Tickets [endpoint](#), e.g.:

- **new_and_my_open:** Syncs tickets that are new and assigned to the user.
- **watching:** Syncs tickets that the user is currently watching.
- **spam:** Syncs tickets marked as spam.
- **deleted:** Syncs tickets that have been deleted.

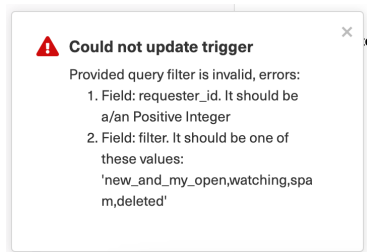
Notes

- The Freshdesk API only allows one filter value at a time. For example, you cannot combine `new_and_my_open` and `watching` in a single query.

- In the Freshdesk connector the triggers are executed by a scheduler rather than in real-time. As a result, synchronization actions may experience slight delays of approximately 30 to 40 seconds.

Error Validation

If a trigger query is not valid, an error pop-up will appear, listing the errors in the query:



Freshdesk REST API:

For further reference, you can consult the Freshdesk REST API documentation to find a complete list of supported fields and their usage in trigger queries.

[Freshdesk REST API Documentation](#)

Triggers in Freshservice

You can configure synchronization in FreshService using field-based filter queries with logical operators.

Syntax

When adding a trigger for FreshService, you can set the fields and values separated by logical expressions like `AND` or `OR`.

Example Filter Query:

```
priority: 1 AND status: 2 OR urgency: 3
```

Alternatively, you can use a simpler syntax with predefined filters and field values separated by `AND` or commas:

```
filter = new_and_my_open AND requester_id = 103099112292  
filter = new_and_my_open, requester_id = 1070031243523
```

Supported Ticket Fields

Field	Type	Description
-------	------	-------------

<input type="text" value="workspace_id"/>	number	Workspace ID of the ticket
<input type="text" value="requester_id"/>	number	User ID of the requester
<input type="text" value="email"/>	string	Email address of the requester
<input type="text" value="agent_id"/>	number	ID of the agent to whom the ticket is assigned
<input type="text" value="group_id"/>	number	ID of the assigned group
<input type="text" value="priority"/>	number	Priority of the ticket
<input type="text" value="status"/>	number	Status of the ticket
<input type="text" value="impact"/>	number	Ticket impact
<input type="text" value="urgency"/>	number	Ticket urgency
<input type="text" value="tag"/>	string	Associated tag
<input type="text" value="due_by"/>	date	Due date (YYYY-MM-DD)
<input type="text" value="fr_due_by"/>	date	First response due date
<input type="text" value="created_at"/>	date	Ticket creation date (YYYY-MM-DD)

Custom Fields

Field Type	Syntax Example
Number	<input type="text" value="custom_field_name: 10"/>
Checkbox	<input type="text" value="custom_checkbox: true"/>
Dropdown	<input type="text" value="custom_dropdown: " value""=""/>
Date	<input 2025-06-24""="" type="text" value="custom_date: "/>

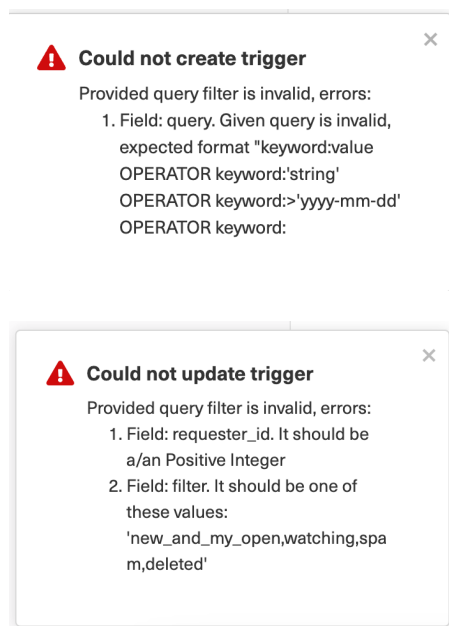
Note: Use snake_case for custom field names.

Error Validation

If your trigger query contains errors, a popup will appear listing the syntax issues. For example:

- Invalid field name
- Incorrect data type
- Misused logical operator

Screenshots of such errors help in debugging, e.g.,



How Filter Queries Differ from List Queries

Feature	Filter Query	List Query
Syntax Operator	Uses <code>:</code> (colon) for equality	Uses <code>=</code> (equals) for equality
Query Structure	Entire query in one string	Built using multiple parameters
Date Filtering	Uses <code>created_at:></code> or <code>:<</code>	Uses <code>updated_since</code>
Logical Operators	Supports <code>AND</code> , <code>OR</code> , and <code>()</code>	Not explicitly supported
Custom Field Support	Fully supported via <code>snake_case</code>	Limited or unsupported

FreshService REST API Documentation

You can find the full list of supported fields and more in the [FreshService REST API documentation](#).

Triggers in HP ALM/QC

Warning: We are moving Exalate for HP QC/ALM into basic maintenance mode. This transition period will last until November 2024, after which support will be halted completely. For more information, please see <https://exalate.com/blog/end-of-support-hp/>.

To specify the filter query, use the formatting allowed by the HP ALM REST API. For more information, please read [Filtering a Collection of Entities](#).

Sync only defects that are in status Open

```
status[Open]
```

Sync only defects that have user field 03 not empty

```
user-03[<>'']
```

Sync only defects that have user field 03 not empty and the status 'New' or 'Open'

```
user-03[<>''];status[New or Open]
```

Sync only test cases which are in status Repair

```
status[='Repair']
```

Sync only test cases in which ID is above one and the status is Ready or Design

```
id[>1]; status[Ready or Design]
```


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