

Modify Apex triggers for a Salesforce dynamic share

Fluorine+

Salesforce [Apex triggers](#) for your Salesforce service integration indicate the conditions that will trigger your Salesforce dynamic share. The conditions for the [SOQL query](#) that runs as part of a dynamic share's Apex trigger can be manually configured on the **Apex Triggers** page. To modify the default Apex triggers created for your Salesforce service integration, you will need to create a Base64 encoded condition and specify the fields you want to include in the dynamic share's outbound messages.



WARNING! If you plan to make additional changes to your Apex triggers after manually modifying them, follow the procedure shown below (rather than modifying your Apex triggers in the [dynamic share form](#)) to ensure that the manual modifications to your triggers are not overridden.

Prerequisites


⚠ First, you will need to follow the steps to [get started with SalesInsight](#).

⚠ You will also need to ensure that the **Active**, **Create**, **Update**, and **Include Attachment** boxes are checked for your [Salesforce dynamic shares](#).

Procedure

To modify the Apex triggers for your Salesforce SIAM integration, follow these steps:

1

Log into your Salesforce organization and click the  icon in the upper left-hand corner of the screen. Then, click the **Perspectiu**
m Replicator app.

2

In the navigation bar near the top of the screen, click **Dynamic Shares**. Then, click into the dynamic share that you want to modify Apex triggers for.

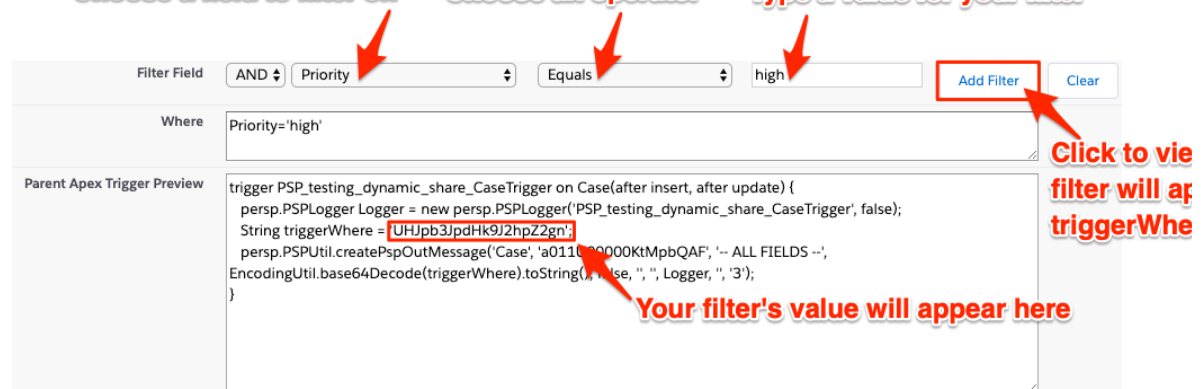
3

To modify the SOQL query in your parent SObject's Apex trigger, create a query using the dropdowns next to **Filter Field** (choose a **field** to filter on, an **operator**, and type a **value** in the textbox). Then, click **Add Filter** to see how the **triggerWhere** clause in your Apex trigger will be updated. To save your parent SObject Apex trigger, scroll down to the bottom of the form and click **Save**. The **Parent Apex Trigger Preview** window will then update its **triggerWhere** clause to include the filter you just created. Finally, click **Save Trigger** to save the changes you made to your dynamic share.

Choose a field to filter on

Choose an operator

Type a value for your filter



The screenshot shows the configuration interface for a dynamic share. At the top, there are three dropdown menus: 'Filter Field' (set to 'Priority'), 'AND' (operator), and 'Priority' (value). To the right of these is an 'Add Filter' button. Below this, the 'Where' clause is shown as 'Priority='high''. At the bottom, the 'Parent Apex Trigger Preview' window displays the updated trigger code. The 'triggerWhere' clause is highlighted in red, showing the Base64 encoded value 'UHJpb3JpdHk9J2hpZ2gn'. Red arrows point from the text labels above to the corresponding parts of the interface: 'Choose a field to filter on' points to the 'Filter Field' dropdown, 'Choose an operator' points to the 'AND' dropdown, 'Type a value for your filter' points to the 'Priority' text input, 'Click to view filter will appear here' points to the 'Add Filter' button, and 'Your filter's value will appear here' points to the Base64 encoded value in the trigger code.

Filter Field	AND	Priority	Equals	high	Add Filter	Clear
Where: Priority='high'						
Parent Apex Trigger Preview						

```
trigger PSP_testing_dynamic_share_CaseTrigger on Case(after insert, after update) {  
    persp.PSPLogger Logger = new persp.PSPLogger('PSP_testing_dynamic_share_CaseTrigger', false);  
    String triggerWhere = 'UHJpb3JpdHk9J2hpZ2gn';  
    persp.PSPUtil.createPspOutMessage('Case', 'a01100000KtMpbQAF', '-- ALL FIELDS --',  
    EncodingUtil.base64Decode(triggerWhere).toString(), false, "", Logger, "", '3');  
}
```

4

To modify the SOQL query in the Apex triggers for child SObjects associated with the parent SObject you are dynamic sharing, scroll down to the **Child Settings** section. Choose any child records you want to include in your dynamic share by using the arrows to move available child records from the list on the left to the list on the right next to **Include Child Records**. Click to highlight the child record that you want to modify the Apex trigger for. Then, create a query using the dropdowns next to **Child Filter Field** (choose a **field** to filter on, an **operator**, and type a **value** in the textbox). Then, click **Add Filter** to see how the **trigger Where** clause in your child Apex trigger will be updated. To save your child SObject Apex trigger, click **Save Child Trigger**. Finally, click **Save** and then **Save Trigger** to save the changes you made to your dynamic share.

Choose child records to include in your dynamic share

Type a value for your filter

Click to the trigger string in SObject!

Choose a field to filter on

Choose an operator

Save Child Trigger

Child Settings

Include Child Records

Attachment
Case
CaseComment
CollaborationGroupRecord
ContentDistribution

ContentDocumentLink
Event

Child Filter Field

AND Is Deleted

Equals false

Add Filter Clear

Child Where

IsDeleted=false

Similar topics

- [Deploy Apex triggers in a Salesforce production organization](#)
- [Modify Apex triggers for a Salesforce dynamic share](#)
- [Check Salesforce connectivity to the Perspectium Mesh](#)

Contact Perspectium Support



US: 1 888 620 8880

UK: 44 208 068 5953

support@perspectium.com