

# Assignment Rule- User Guide

## Objective

Salesforce has provide the functionality to apply assignment rule for two standard Object i.e “Leads” and “Case” only . This constraint is not allowing to apply the assignment rule on other objects whether it is standard or custom object. We need to provide the solution to apply the assignment rule on any custom or standard object.

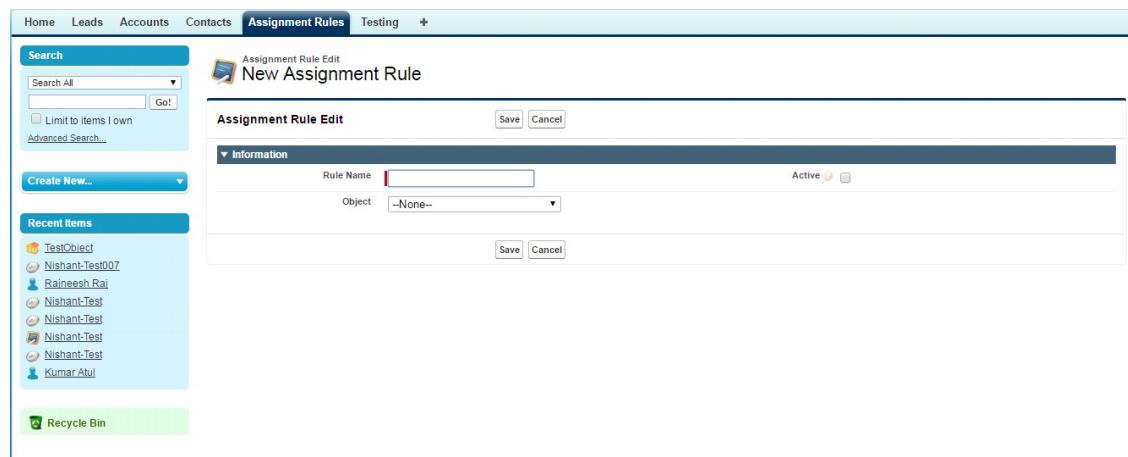
## Summary

This particular application allows the user to apply the assignment rule on any standard or custom object. User can create assignment rule and conditions in the assignment rule which can be applied to any type of object.

## Functional Process

### Create Assignment Rule

User can create new assignment rule by using this functionality. User can follow different steps:

The screenshot shows the Salesforce user interface for creating a new assignment rule. The top navigation bar includes links for Home, Leads, Accounts, Contacts, Assignment Rules (which is currently selected), and Testing. On the left sidebar, there is a 'Search' section with a search bar and a 'Create New...' button. Below this is a 'Recent Items' list showing various test objects and users. The main content area is titled 'New Assignment Rule' and contains an 'Assignment Rule Edit' form. The form has a 'Rule Name' text input field, an 'Object' dropdown menu currently set to '--None--', and an 'Active' checkbox. There are 'Save' and 'Cancel' buttons at the top right of the form and another set of 'Save' and 'Cancel' buttons at the bottom right.

- User can navigate to “New Assignment Rule” to create any new assignment.
- User can put rule name and select the object for which he wants to apply the rule.
- User can assign “Active” or “Deactivate” state for the assignment rule. Only active assignment rule will be considered to be applicable with the object.

**Note:** Object can have multiple assignment rules but at a time only one assignment rule can be active for any object.

- Once user save this information , user can navigate to the following screens where he can do following actions:

- Edit
- Delete
- Clone
- Reorder
- New Assignment Rule Line Item

This screenshot shows the Salesforce interface for configuring an Assignment Rule named 'Rishi'. The page is under the 'Assignment Rules' tab. On the left, there is a sidebar with a search bar, a 'Create New...' button, and a 'Recent Items' list containing various test rules and accounts. The main content area displays the 'Assignment Rule Detail' for 'Rishi', showing it is active and created by 'Rajneesh Raj'. Below this, the 'Assignment Rule Line Items' section is empty, with a 'New Assignment Rule Line Item' button. At the bottom, there is a footer with copyright information and links to privacy and security statements.

- User can edit this assignment rule by clicking on edit button.
- User can clone this assignment rule by clicking on clone button.
- User can delete this assignment rule by clicking on delete button.

**Note:** While editing the assignment rule, you can take action on whether you want to apply this on existing records related to that particular object on activating "For Existing Records" field. This option is shown in following screenshot.

This screenshot shows the 'Assignment Rule Edit' page for a rule named 'AccountAssignment'. The page is under the 'Assignment Rules' tab. The left sidebar is similar to the previous screenshot, but the 'Recent Items' list is updated with 'AccountAssignment' at the top. The main content area displays the 'Assignment Rule Edit' form, which includes fields for 'Rule Name' (AccountAssignment), 'Object Name' (Account), and 'Active' (checked). There is also a 'For Existing Records' checkbox, which is currently unchecked. The 'Owner' is listed as 'Rajneesh Raj'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons. A red error message 'Required Information' is visible at the top right of the form.

## Create New Assignment Rule Item

New assignment rule items are the conditions under the assignment rule which user wants to verify before doing any actions.

- User can set the rule priority by which rule entry can be processed. There can be multiple rule entries user wants to put as conditions.
- User can select the criteria for the rule entry. User can provide logical operator (And, OR – All, Any) between multiple conditions.
- User can select the person to whom this record has to be assigned.
- User can save this rule by using “Save” button.
- User can add multiple assignment rule line item under the assignment rule related to one particular object.


The screenshot shows the Salesforce interface for editing an assignment rule. The top navigation bar includes the Salesforce logo, a rainbow icon, and a user profile for 'Rajneesh Raj'. The main navigation menu has tabs for 'Home', 'Leads', 'Accounts', 'Contacts', 'Assignment Rules', and 'Testing'. The 'Assignment Rules' tab is active, showing the 'Edit Assignment Rule Criteria' page for 'Account: AccountAssignment'.

The page is divided into three main sections:

- Left Sidebar:** Contains a 'Search' section with a search bar and a 'Limit to items I own' checkbox. Below it is a 'Create New...' button and a 'Recent Items' list with links to 'AccountAssignment', 'Nishant-Test', 'TestObject', 'Nishant-Test007', 'Rajneesh Raj', 'Nishant-Test', 'Nishant-Test', and 'Kumar Abul'. At the bottom is a 'Recycle Bin' button.
- Main Content Area:**
  - Header:** 'Edit Assignment Rule Criteria' and 'Account: AccountAssignment'.
  - Buttons:** 'Save' and 'Cancel' buttons.
  - Step 1:** 'Set the order in which this rule entry will be processed'. It includes an 'Order' input field.
  - Step 2:** 'Select the criteria for this rule entry'. It includes a dropdown for 'Run this rule if' (set to 'All') and a note about field formats. Below is a table with columns 'Field', 'Operator', and 'Value'. The table has 6 rows, each with a '--None--' dropdown for the field and operator, and an empty text box for the value. An 'Add Row' link is at the bottom of the table.
  - Step 3:** 'Select the user to assign the record to'. It includes an 'Assign to' input field and a search icon.
  - Buttons:** 'Save' and 'Cancel' buttons at the bottom.

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- If user has multiple assignment rule line item under one assignment rule then user can change the order of the rule according to their priority by using "Reorder" button. User can change the order and update it accordingly.

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Rajneesh Raj Setup Help Custom Assignment Rule

Home Leads Accounts Contacts **Assignment Rules** Testing

**Search**

Search All  Go!

☐ Limit to items I own [Advanced Search...](#)

**Create New...**

**Recent Items**

- AccountAssignment
- Nishant-Test
- TestObject
- Nishant-Test007
- Rajneesh Raj
- Nishant-Test
- Nishant-Test
- Kumar Abul

[Recycle Bin](#)

**Account Assignment Rule**

You can reorder rule entries on this page.

**Rule Detail**

Rule Name AccountAssignment Active ☐

Object Name Account Created By Rajneesh Raj

**Rule Entries**

Order	Rule Criteria	Assign To.
<input type="text" value="1"/>	BillingStreet equals Sodaia AND BillingCity equals Jaipur AND BillingCountry equals India AND BillingPostalCode equals 302022 AND BillingState equals Rajasthan	<a href="#">Kumar Abul</a>
<input type="text" value="2"/>	BillingCity equals Jaipur AND Name equals rajiv kumawat	<a href="#">Endive Software</a>

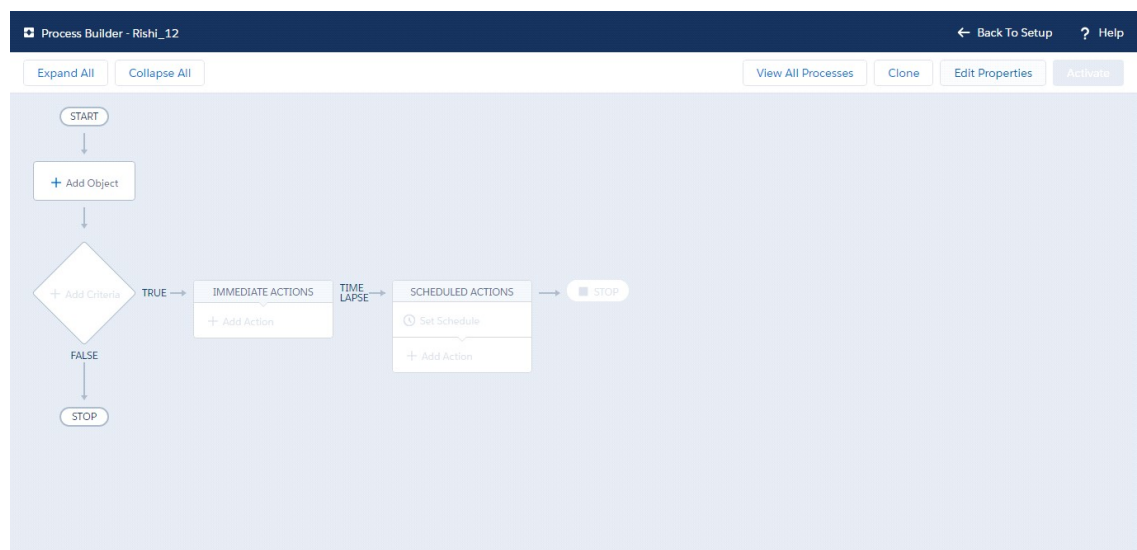
[Update Order](#) [Cancel](#)

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## Process Builder Steps

Process builder is the process where we define how to execute the assignment rule. There are certain steps to follow to make the process builder for that.

- User can navigate to process builder through “Setup” option.
- User can fill the following information for new process.
  - Process Name
  - API Name
  - Description
  - Process Start condition
    - A record changes (Select this)
    - It's invoked by another process



- User can add the object for which he wants to create the process builder by clicking on "Add Object".
- While adding the object user needs to fill the following information.
  - Object Name (Eg. Account)
  - Start the process
    - Only when a record is created (Mark this)
    - When a record is created or edited
- User selects the required information and save the process.
- After adding the object user can add the criteria by clicking on "Add Criteria" for which user wants to create the condition?
  - Criteria Name
  - Criteria for Executing Actions
    - Conditions are met
    - Formula evaluates to true
    - No criteria—just execute the actions! (Mark this)
- User selects the required information and save the process.
- After adding criteria user can add the action which has to perform under "Immediate Action".
  - Click on "Add Action", Select and Define Action section will prompt on right side user needs to fill the following information.
    - Action Type (Select '**Apex**')
      - Action Name
      - Apex Class (Select '**es\_car\_\_AssignmentRuleCall**')
        - Set Apex Variables, under this click on 'Add Row'
          - Field (Select '**recordId**')
            - Type (select '**Reference**')
              - Value (Select '**Account ID**')
                - User selects the required information and save the process.
                - After Saving all the information "Activate" this Process juston clicking "Activate" button.