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.

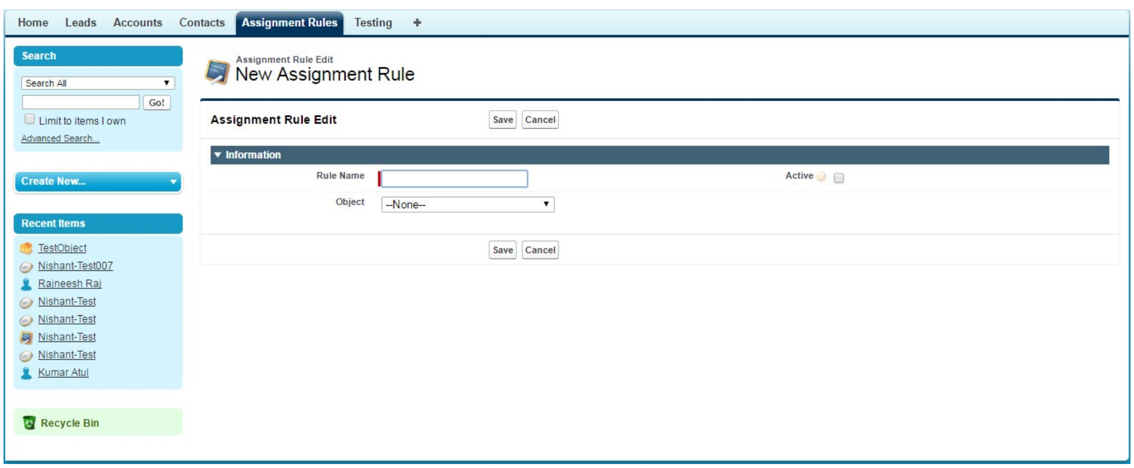
Summary

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:

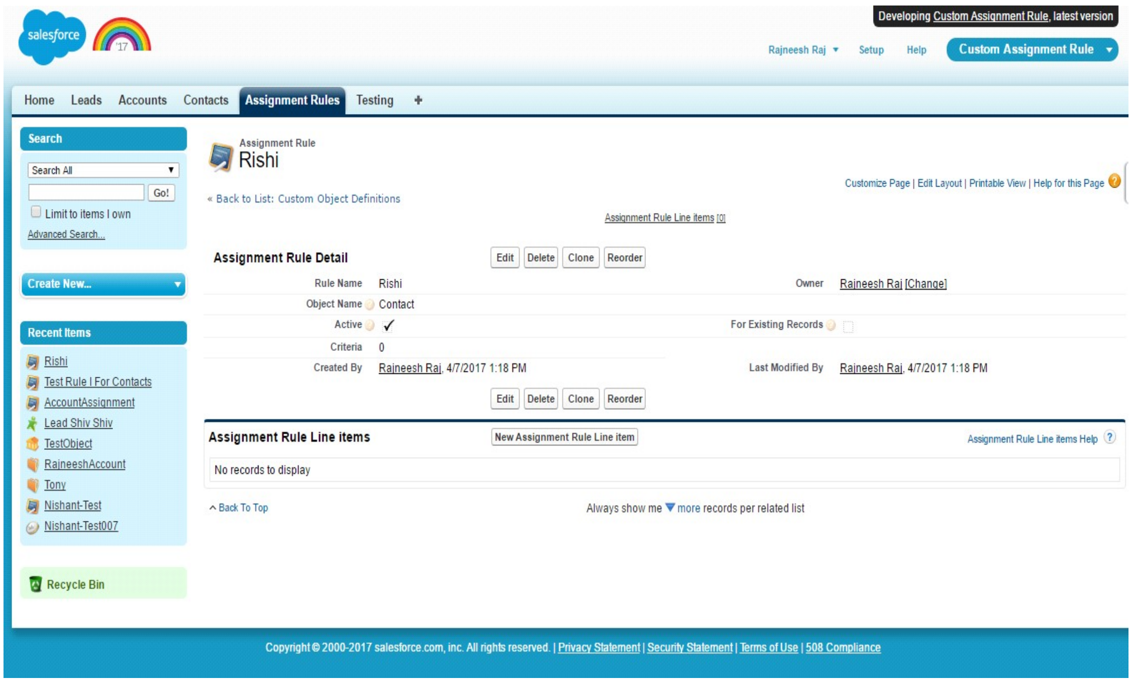


- User can navigate to "New Assignment Rule" to create any new assignment.
- User can put rule name and select the object for which he wants to apply the rule.
- User can assign "Active" or "Deactivate" state for the assignment rule. Only active assignment rule will be considered to be applicable with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

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

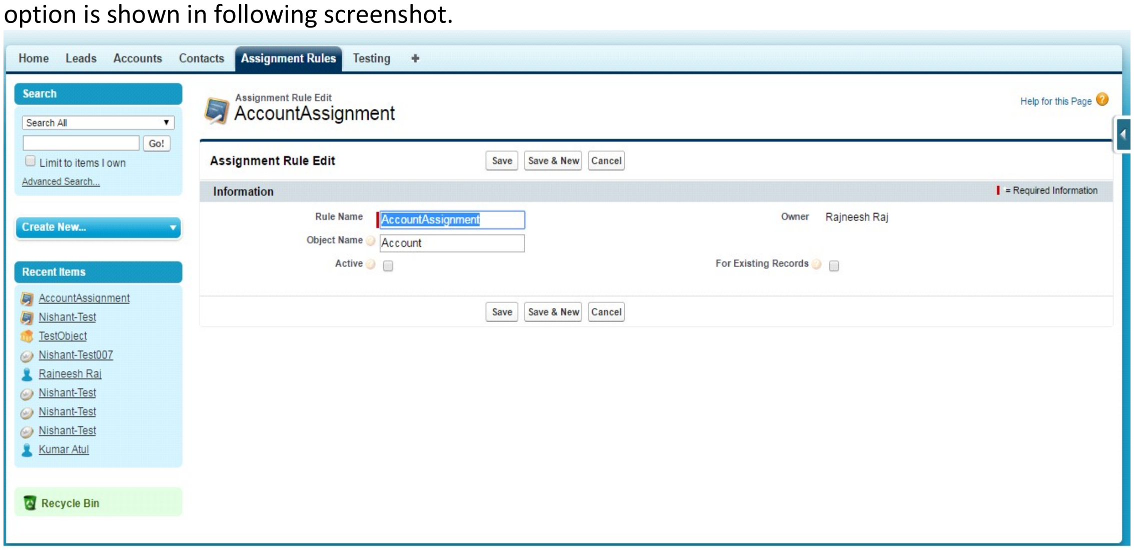
- Once user save this information , user can navigate to the following screens where he can do following actions:

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



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

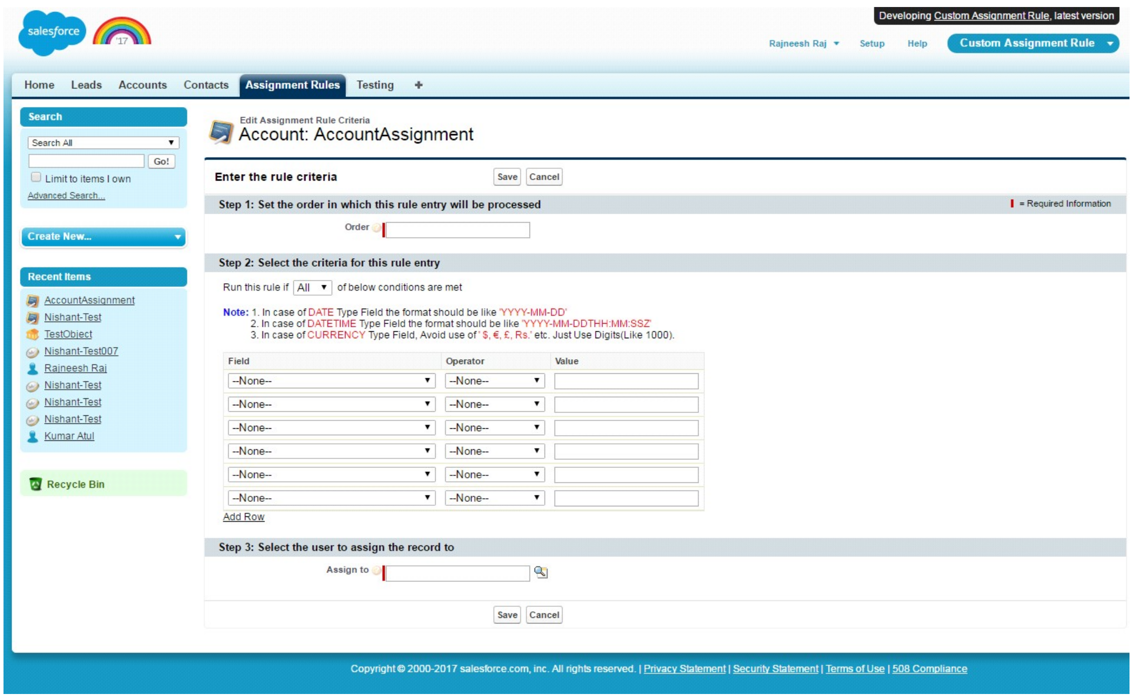
Note: While editing the assignment rule, you can take action on whether you want to apply this on existing records related to that particular object on activating "For Existing Records" field. This option is shown in following screenshot.



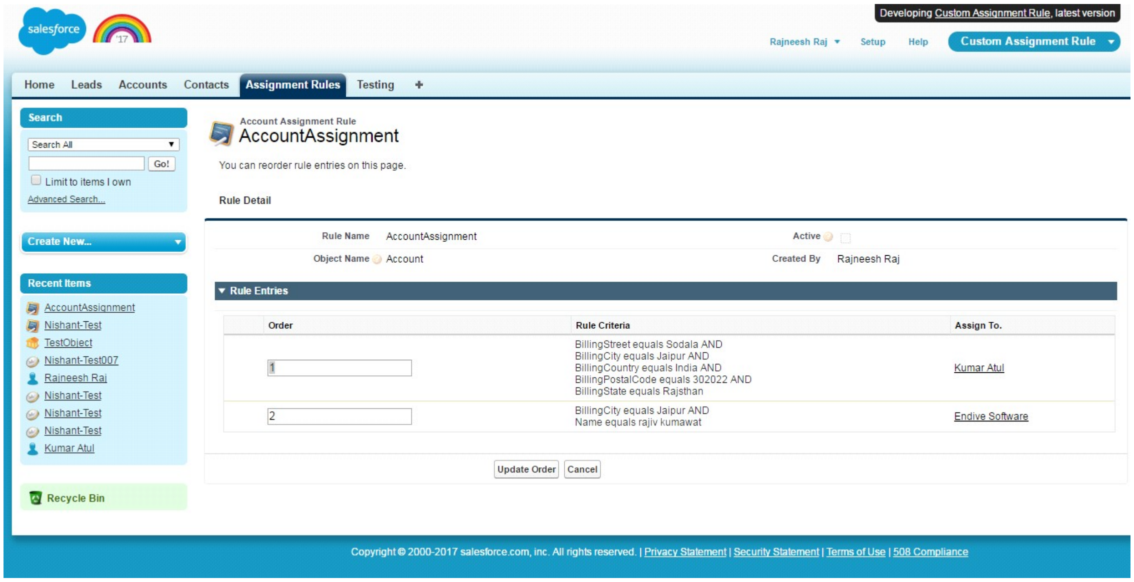
Create New Assignment Rule Item

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.



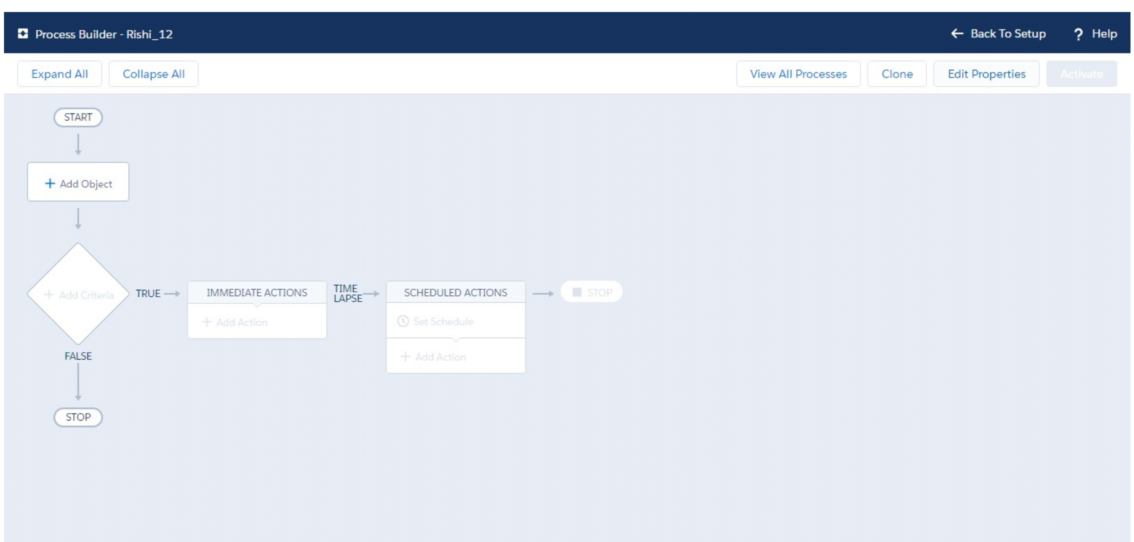
- If user has multiple assignment rule line item under one assignment rule then user can change the order of the rule according to their priority by using "Reorder" button. User can change the order and update it accordingly.



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 s 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 "Immidiate 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 '**recordIds'**)
            - 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.