

2021

Installation Guide

FORCE RULES
ADVANCE ASSIGNMENT RULES
WINTER'21



Created by Horicent Systems

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1 HOW DOES IT WORK?

Admin needs to create a flag (Checkbox) *Assign_Owner_using_Assignment_Rules__c* in the Object where Rules need to run.

Only if the records have this flag Checked, will go through Force Rule Engine and assign the records to the respective Owner based on rule criteria.

2 POINT & CLICK BASED INSTALLATION

2.1 WHEN TO USE IT?

Force Rules can be enabled using Process Builder or Lightning Flow. This approach is suitable for low volume data handling.

2.2 USING PROCESS BUILDER

Go to Setup -> Home Tab -> Find Process Builder on Setup Sidebar -> Click on "New" Button

Enter **Process Builder Name** and Select "**A record changes**" value in "**The process starts when**". Click on Save button

New Process

Process Name *

API Name *

Description

The process starts when *

A record changes

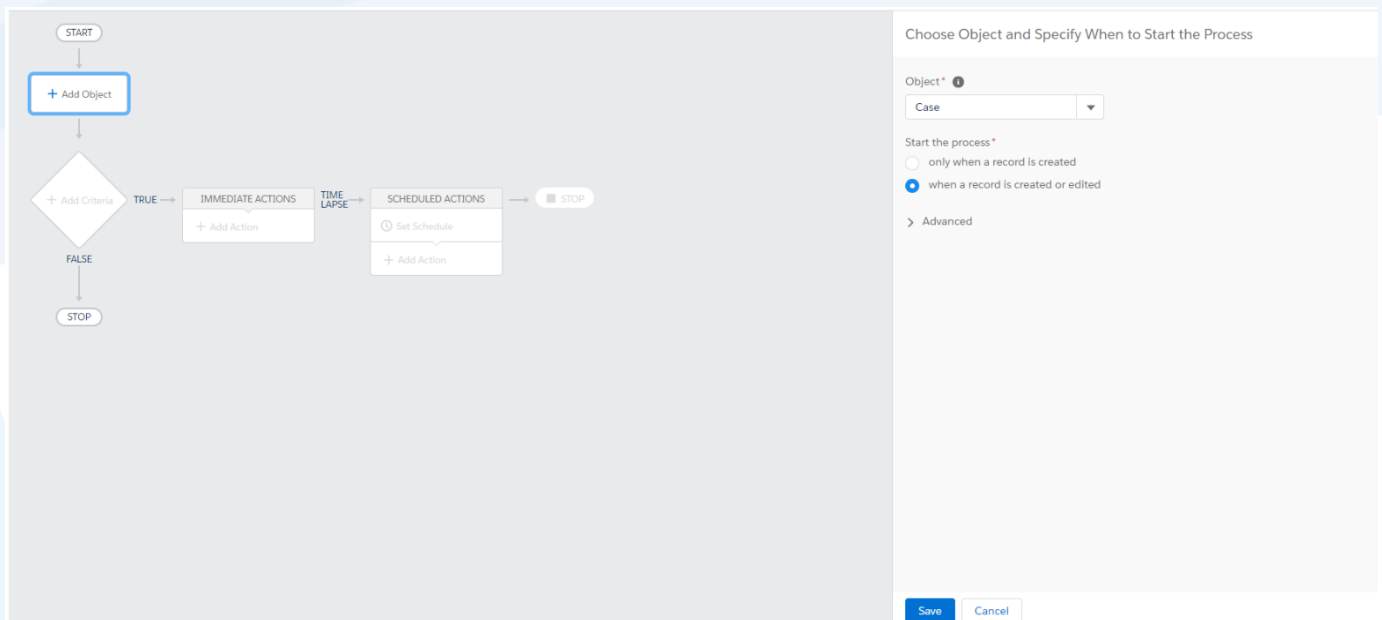
Cancel

Save



In the process builder, click on the “+ **Add Object**” node and Select the Object (e.g. Lead / Case / Opportunity) on which Assignment Rules need to run.

From the option “**Start the process**”, select “**When a record is created or edited**” and Click on the “**Save**” button.





Click on the **+ Add Criteria** node, in the right sidebar enter Criteria **Name** and in the **Criteria for Executing Actions** option, select **“Conditions are met”**.

In the Set Conditions **Field** column, select the new field **“Assign Owner Using Assignment Rules”**, Select Operator as **“Equals”**, Type as **“Boolean”** and Value as **“True”**.

From the **Conditions**, select **“All of the conditions are met (AND)”** option and Click on **“Save”** button

The screenshot displays the Force Rules configuration interface. On the left, a flowchart shows a process starting with a 'START' node, followed by a 'Case' node, then a decision diamond labeled '+ Add Criteria'. The 'TRUE' path leads to an 'IMMEDIATE ACTIONS' box with '+ Add Action', and the 'FALSE' path leads to a 'STOP' node. On the right, the 'Define Criteria for this Action Group' panel is shown. It includes a 'Criteria Name' field with the value 'Run when assignment flag is check'. Under 'Criteria for Executing Actions*', the 'Conditions are met' option is selected. The 'Set Conditions' section contains a table with one row: Field '[Case].Assign_... Q', Operator 'Equals', Type 'Boolean', and Value 'True'. Below this, the 'Conditions' section has the 'All of the conditions are met (AND)' option selected. At the bottom, there are 'Save' and 'Cancel' buttons.

START

Case

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

FALSE

STOP

Define Criteria for this Action Group

Criteria Name* ⓘ

Run when assignment flag is check

Criteria for Executing Actions*

☒ Conditions are met

☐ Formula evaluates to true

☐ No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *	Value *
1 [Case].Assign_... Q	Equals	Boolean	True

+ Add Row

Conditions*

☒ All of the conditions are met (AND)

☐ Any of the conditions are met (OR)

☐ Customize the logic

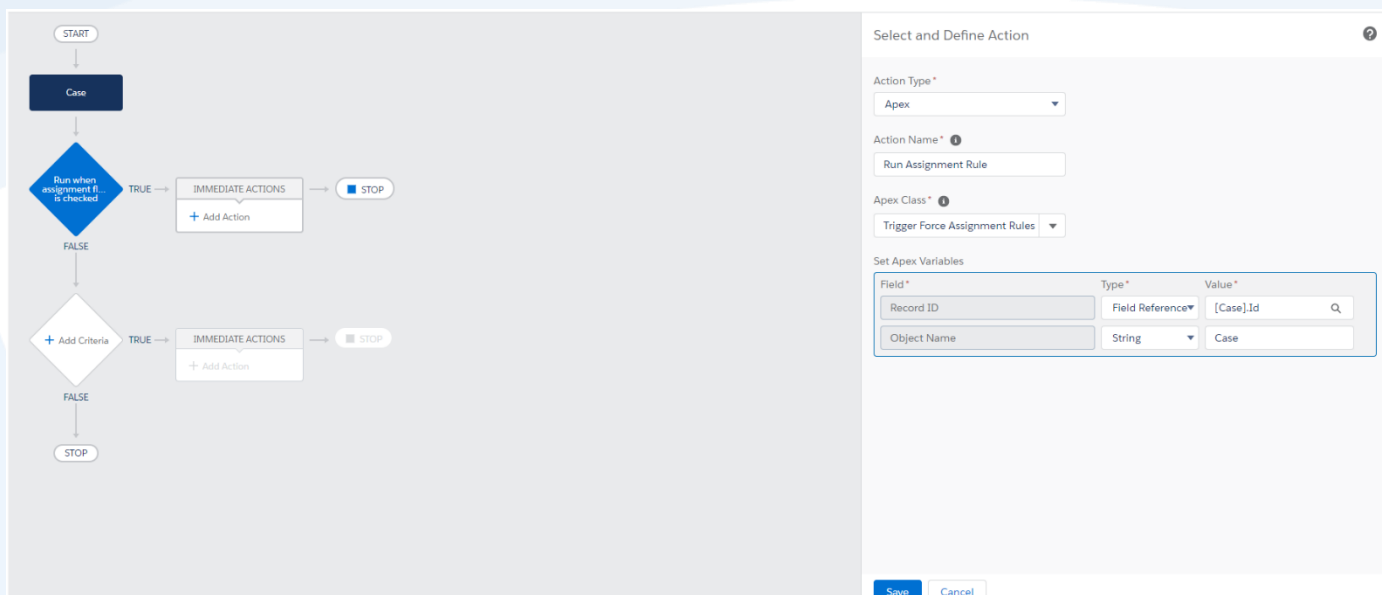
> Advanced

Save Cancel



Click on **+ Add Action** node, in **Select and Define Actions** select “**Apex**” as **Action Type**. Enter the **Apex Name**, Select “**Trigger Force Assignment Rules**” in Apex Class.

In the Apex Variables, in the **Record ID** variable pass ID of current Record using Field Reference type. In the **Object Name** variable, pass the name of the current object. E.g., Case, CustomObject_c etc.



As a final step **Activate** the Process Builder.

3 CODE BASED INSTALLATION

3.1 WHEN TO USE IT?

Force Rules supports large data volume as well. Rules engine can be accessed / enabled via apex code. To enable it for any entities, use the Apex Trigger.

3.2 APEX TRIGGER

Create a Trigger on Object in which assignment rules need to be applied. Enter the Name of Trigger, in the Event, add After Insert, After Update.

Paste the following code snippet in Trigger body:

```
forcerules.RecordAssignmentHandler.rulesHandler(trigger.new, '<Object API Name>');
```

Final trigger code should look like this:

```
Trigger RunAssignmentRulesOnCase on Case(After Insert, After Update){  
    forcerules.RecordAssignmentHandler.rulesHandler(trigger.new, 'case');  
}
```

Create the Test Class for Code Coverage of this trigger and deploy it to Production.

4 PERMISSION SETS

There are 2 permission sets included in the Force Rules application.

4.1 FORCE RULE PERMISSIONS ADMIN

Assign this Permission Set to each of the Admin users those are supposed to Create / Manage Assignment Rules.

4.2 FORCE RULE PERMISSIONS AGENT

Assign this Permission Set to each of the Business users who create / manage records on which assignment rules need to be run.