

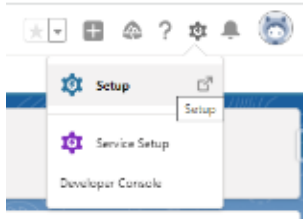
Auto Run Territory Assignment Rules by Trigg Digital: Configuration Guide

When you install the Package from the AppExchange all of the features and functionality will be enabled for you.

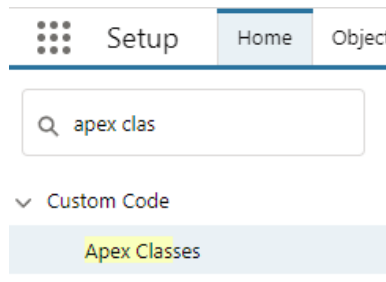
To enable this solution for your users you will need to complete the following;

Grant Access to Apex Class

(1) Navigate to Salesforce Setup



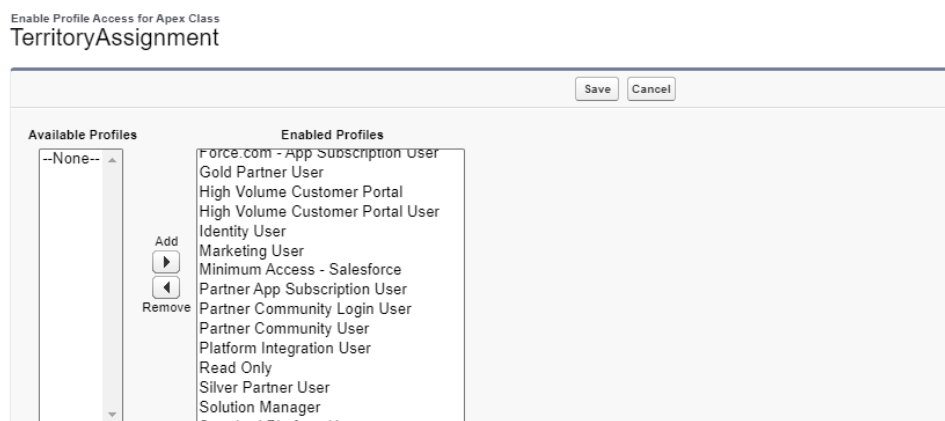
(2) Within the Quick Find search for “Apex Classes” and press on the result



(3) Locate TerritoryAssignment and press on Security



(4) Make this Enabled for the necessary profiles and then press Save



Repeat this process for TerritoryAssignmentHandler.



How to use within Process Builder

Using the functionality of the Process Builder when a record meets a certain criteria you can automatically run Territory Assignment Rules. For example, let's run the rules whenever an Account is created or edited.

- (1) On the start criteria set the object to "Account" and Start the Process "When a record is created or edited".

Choose Object and Specify When to Start the Process

Object * ⓘ
Account

Start the process *
only when a record is created
☒ when a record is created or edited

> Advanced

- (2) On the Action Group set the Criteria Name to "ISNEW or ISCHANGED", the Executing Actions to "No criteria - just execute the actions"

Define Criteria for this Action Group

Criteria Name * ⓘ
ISNEW or ISCHANGED

Criteria for Executing Actions *
Conditions are met
Formula evaluates to true
☒ No criteria—just execute the actions!

- (3) Within the actions call, a Apex Class called Territory Assignment set the Action name and the Account ID.

Call Apex ⓘ

Action Name * ⓘ
Run Territory Assignment Rules

Apex Class * ⓘ
Runterritory__TerritoryAssignment

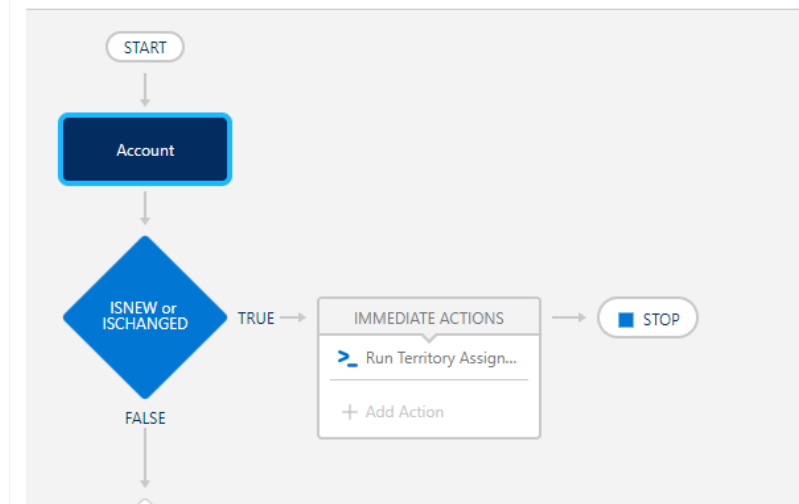
Set Apex Variables

Field *	Type *	Value *
recordId	Field Reference ▼	[Account].Id 🔍

A full breakdown of the other variables for this code can be found below;

recordIds	This is designed to accept a collection of Account IDs for which to run the Territory Assignment Rules for.
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The example Process should look like this;



How to use within Flow

Within a Flow add a Apex Action for “Convert Lead” and set the variables as below;

recordIds	This is designed to accept a collection of Account IDs for which to run the Territory Assignment Rules for.
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Other Points to Note

- In order to use the solution you need to have access to the Apex Class.
- To run the solution you need the necessary access eg. Read, Edit on Accounts