Zoho Corporation

Assign apps using conditions

ⓘ General Info: Only the Standard plan allows you to assign apps to specific members of a group.

Prerequisites

Permissions required to perform this action:

- Assign apps

Assign apps using conditions:

1. Sign in to [Zoho Directory](#), then click **Admin Panel** in the left-menu.
2. Go to **Applications**, then choose an app.
3. Go to **Conditional Assignment**, then click **Assign Group**.
4. Choose a group to apply the condition to, or click **Everyone** if you want to apply the condition to your entire organization.
5. Check **Also apply condition to existing members** to apply the conditions to the users already present in the chosen group. If this is unchecked, those users will be excluded from the condition.
6. Check **Overwrite the roles assigned manually to Users** to apply the condition to users who already have access to the app. If this is unchecked, those users will be excluded from the condition and retain the role assigned manually by the admin.
7. If you want to filter users based on criteria, choose **Users matching criteria** under *Apply rule to*. Otherwise choose **All members**.
8. If you choose **Users matching the criteria**, set the criteria:
    - Choose an [attribute](#) to filter users by.

- Set the value for the criteria, and the relationship between the attribute and the value.
- Click **Assign**.

9. If you add more than one criteria, set the [criteria pattern](#).
10. Choose the [application settings](#). The application settings changes based on the application being assigned. Some apps might not have any application setting.
11. Click **Save** to save the rule.
12. To add another rule, click **ADD NEW RULE**.

> 📄 Note: When you add more than one rule, if the first rule was applied to **All members**, it will be changed to **Other members**. Choosing **Other members** will assign the app to users who don't match the previous rules.

13. After adding the required rules, click **Assign**.

If multiple rules are present, they will be checked in the order they are added. Only the users who don't match the first rule will be checked against the second, and so on. You can also add multiple conditions for an application. However, the conditions will be prioritized based on [condition priority](#).

Setting criteria and criteria pattern

Criteria are the fundamental filters of Conditional Assignment. If you choose **Users matching the criteria** when configuring the rule, you can add one or more criteria to filter the users.

You can set criteria using the 13 available attributes:

- Group Role
- First Name
- Last Name
- Primary email
- All Emails
- Created time
- User Type
- User Status
- Reports to
- Location
- Designation
- Department
- Member of Group

> ⓘ Info: If you've added [custom fields](#), you can also use them as attributes.

To filter users more precisely, you can add multiple criteria. When you add the second criteria, you can connect it to the first criteria using AND/OR relationships. An AND relationship means the rule will only apply to users who

fit both criteria, while an OR relationship means the rule will apply to users who fit either criteria. By default, newly added criteria are related to the existing ones through an OR relationship.

You can set the criteria pattern by clicking **Edit** next to *CRITERIA PATTERN*. It uses brackets to group criteria and change the way they relate to each other. Let's look at a few examples:

- ((1 AND 2) OR 3) — This means the user must fit either the 3rd criteria or the first two criteria for the rule to apply to them.
- (1 AND (2 OR 3)) — This means the user must fit the first criteria and either of the last two criteria for the rule to apply to them.

Consider the following case: you need to assign Salesforce only to active users in California and New York who joined in 2018. You can do this with a single condition, by assigning the app to **Everyone** and setting these criteria:
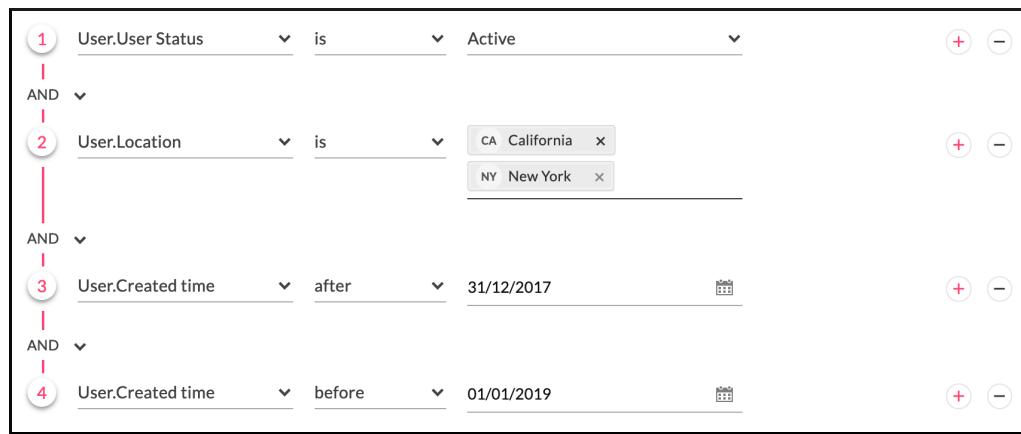
Once you get the hang of using attributes (like *User.UserType*, *User.Designation*, and *User.ReportsTo*) and criteria patterns, you'll be able to create custom conditions to suit all your automated app assignment needs.