



Conditional assignment - Overview

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

What is conditional assignment?

Conditional Assignment removes the time-consuming task of assigning apps individually to users by automating it based on preset conditions. The conditions are triggered whenever confirmed users are added to or removed from a group.

Let's look at an example: Amelia is the system administrator of Zylker. She decides to use Slack and Zoho Desk. Zoho Desk supports role and department assignment through Zoho Directory and has three default roles (Admins, Agents, and Light Agents). Amelia also sets up two departments (Zylker Finance and Zylker Sales) in Zoho Desk. She doesn't want to spend time assigning the apps to every new user individually, so she decides to use Conditional Assignment to simplify the process. She creates two groups, Employees and Managers, and becomes a member of both.

She then sets conditions to assign Zoho Desk through Conditional Assignment.

1. She [creates a new condition](#), giving all members of *Managers* Admin access to the Finance Department.

Assign Desk to Group

Individual **Group** Everyone

Chosen Group

FI **Managers**
Change

☐ Also apply condition to existing users
☐ Overwrite the roles assigned manually to Users.

CONFIGURE THE CONDITION

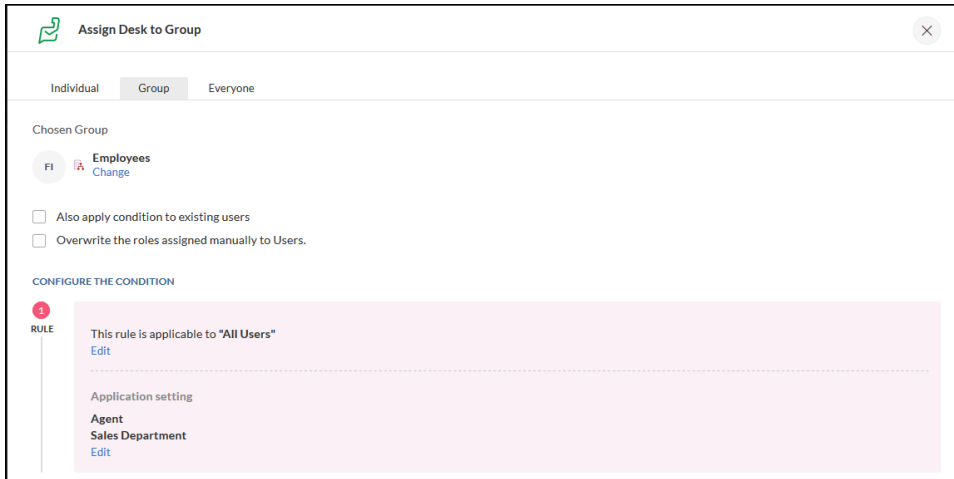
1 **RULE**

This rule is applicable to "All Users"
[Edit](#)

Application setting

Admin
Finance Department
[Edit](#)

2. She creates a second condition, giving all members of *Employees* Agent access to the Sales Department.



The screenshot shows a dialog box titled "Assign Desk to Group". It has three tabs: "Individual", "Group", and "Everyone". The "Group" tab is selected. Under "Chosen Group", there is a selection for "Employees" with a "Change" link. Below this are two checkboxes: "Also apply condition to existing users" and "Overwrite the roles assigned manually to Users.", both of which are unchecked. The "CONFIGURE THE CONDITION" section shows a rule for "All Users" with an "Edit" link. The application settings for this rule are "Agent" and "Sales Department", with an "Edit" link.

3. She sets a third condition giving all Zylker users Light Agent access to the Sales Department.



The screenshot shows a dialog box titled "Assign Desk to Everyone". It has three tabs: "Individual", "Group", and "Everyone". The "Everyone" tab is selected. Under "Chosen Group", there is a selection for "Everyone" with a "Change" link. Below this are two checkboxes: "Also apply condition to existing users" and "Overwrite the roles assigned manually to Users.", both of which are unchecked. The "CONFIGURE THE CONDITION" section shows a rule for "All Users" with an "Edit" link. The application settings for this rule are "Light Agent" and "Sales Department", with an "Edit" link.

She also adds a condition for Slack to be assigned to all Zylker users.

Since all three conditions apply to Amelia, the priorities of the conditions are checked. Priority plays an important role during app assignment.

Condition priority

Priorities affect [application settings](#) during app assignment. Mastering the use of priorities can help you create powerful assignment automation.

When multiple conditions are added for an application, the conditions are prioritized in the order they are added. You can re-order these conditions in the *Conditional Assignment* section in the *Applications* page.

Priorities also affect [application settings](#) based on the setting's type: single value fields or multiple value fields. When multiple conditions apply to a user, only the field value of the highest priority condition will be taken in to account for single value fields. However for multiple value fields, the combination of all the values will be applied.

In the above example, all three conditions apply to Amelia, and because the **Managers** group was added first, it has the highest priority. *Role* is a single-value field, so Amelia is an Admin. *Department* is a multiple-value field, so Amelia is given access to both Finance and Sales departments.

Removing users from a group

When a user is removed from a group, their permissions also change accordingly.

Let's assume an employee, Arthur, goes on a sabbatical, promising to rejoin Zylker. So Amelia removes him from the groups, but not from the company. His Agent access is revoked, but he remains a Light Agent in Sales due to the third condition. He also retains his Slack access.