Salesforce Case Assignment Rules: Practical Routing Patterns

CHEATSHEET

Master the routing engine, design scalable queue structures, and prevent SLA breaches.

Stop letting critical customer cases rot in the default queue because your Salesforce Case Assignment Rules are evaluated in the wrong order.

1 How the Routing Engine Works

Before building, understand the rigid execution order of Salesforce's assignment engine to prevent silent routing failures.

- Only one Case Assignment Rule can be active at a time per Salesforce org.
- Rule entries are evaluated top-to-bottom; Salesforce stops at the first match.
- Each rule entry can route cases to either a named User or a Queue.
- Fires on Web-to-Case, Email-to-Case, or manual creation (if active checkbox is checked).
- Unmatched cases fallback to the Default Case Owner in Support Settings.

2 Scalable Queue Design Patterns

Avoid queue sprawl. For most mid-sized service teams, 3 to 6 queues cover the vast majority of routing scenarios.

- Priority Tier: Tier 1 General, Tier 2 Technical, Tier 3 Engineering Escalation.
- Product Line: Split by functional areas like Billing Support or Product A/B.
- Region/Language: Route geographically (e.g., EMEA, APAC, Americas).
- Channel: Segregate by source such as Email, Web, or Phone.
- Best Practice: Add Public Groups to queues instead of individual users for easier upkeep.

3 Critical Setup Best Practices

Keep your routing clean, maintainable, and highly visible to prevent assignment gaps and operational bottlenecks.

- Keep rules consolidated within the single active assignment rule structure.
- Arrange rule entries from most specific criteria to most general.
- Define a clear safety net to catch cases that bypass initial criteria.
- Utilize Salesforce Escalation Rules alongside assignment rules to enforce SLAs.