

Stop losing pipeline to broken routing mechanics and silent lead assignment failures.

Leads silently piling up in your default queue or routing to inactive users? Here is how to fix, test, and master Salesforce Lead Assignment Rules.

1 How Lead Assignment Mechanics Work

Salesforce evaluates rule entries top-to-bottom. The first match wins. Make sure you understand these guardrails to avoid routing disasters:

- ✦ Only ONE assignment rule can be active in your org at a time.
- ✦ Each active rule can contain up to 3,000 individual rule entries.
- ✦ Evaluation order is strict—improper sequence numbers swallow valid leads.
- ✦ Rules only fire if 'Assign using active assignment rule' is checked.

2 5 Steps to Flawless Routing Setup

Build your rule logic carefully to ensure leads find the right owner or queue instantly.

- ✦ **Navigate:** Quick Find 'Lead Assignment Rules' under Marketing.
- ✦ **Activate:** Create your rule and check 'Active' (deactivates prior rules).
- ✦ **Order Entries:** Use strict evaluation order (lower sequence first).
- ✦ **Assign:** Route to specific active users or pre-configured queues.
- ✦ **Fallback:** Confirm Default Lead Owner is configured in Lead Settings.

3 Silent Routing Failures to Avoid

Watch out for these three common traps that break lead assignment without throwing errors:

- ✦ **Broad rules too high:** Catch-alls placed early swallow specific matches.
- ✦ **Inactive users:** Assignment to inactive reps routes silently to default queues.
- ✦ **Missing checkbox:** Edit actions won't re-route unless checked or automated.