

TROUBLESHOOTING

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.

Salesforce Lead Assignment Rules: Setup, Testing, and Common Mistakes

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

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.

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.

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.

THAT'S A WRAP

Master Your Salesforce Lead Routing

Don't let valuable inbound leads sit unworked. Read the full guide on SalesforceLWC to download our setup checklists and debugging guides.

- ✦ Read the full article at salesforcelwc.com
- ✦ Learn duplicate rule interactions
- ✦ Optimize your Sales Cloud Lead Management

→ salesforcelwc.com

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