

Salesforce Lead Assignment Rule QA & Go-Live Checklist

Run once per rule change. Keep the completed sheet with the release record.

Rule name _____

Environment _____ Test date _____

Rule ID _____

Release owner _____

1 Configuration gate

Confirm the rule you are testing is the rule you intend to activate.

- ☐ Only the intended lead assignment rule is Active.
- ☐ Entries are in the approved sort order.
- ☐ Every queue/user owner is active and can receive leads.
- ☐ Default Lead Owner is intentional and monitored.
- ☐ Entry criteria use the final saved field/API values.
- ☐ A rollback owner and previous configuration are recorded.

2 Core test set

Use synthetic leads and record expected owner before each run.

- ☐ Positive test: one lead that matches each entry.
- ☐ Negative test: one near-match that must not enter each rule.
- ☐ Overlap test: lead matches two entries; higher priority wins.
- ☐ No-match test: lead lands on Default Lead Owner.
- ☐ Queue test: record is visible to the intended queue members.
- ☐ Re-test one boundary value on each deciding field.

3 Channel matrix

A rule can pass in the UI and still fail through another creation path.

- ☐ Manual UI: Assign using active assignment rule is selected.
- ☐ Web-to-Lead: submission reaches the expected owner/queue.
- ☐ Data import: assignment-rule option is tested on and off.
- ☐ REST integration: AssignmentRuleHeader behavior is verified.
- ☐ SOAP/integration user: assignment header behavior is verified.
- ☐ Marketing automation sync: owner is not overwritten later.
- ☐ Duplicate rule: test record is not blocked before assignment.

4 Evidence and timing

Prove the owner, timestamp and downstream effects - not just record creation.

- ☐ Expected owner is written before execution.
- ☐ Actual owner/queue and assignment timestamp are captured.
- ☐ Notifications/tasks fire once, to the correct recipient.
- ☐ Later workflow/flow updates do not silently change ownership.
- ☐ Re-running the test does not create duplicate records/actions.
- ☐ Failure evidence includes record ID, channel and deciding fields.
- ☐ Production smoke test is prepared for the first live record.

5 Go / no-go decision

Do not activate on a partial pass. Record every exception and its owner.

- ☐ GO - all required tests passed; evidence attached; rollback ready.
- ☐ NO-GO - one or more required tests failed or remain unproved.

Open exception(s) _____

Release approver _____

Approval date _____

Rollback trigger _____

First-hour checks ☐ owner correct ☐ notification correct ☐ queue capacity healthy