

Q-assign: advanced routing and assignment for Salesforce

Assign every Lead, Case, Opportunity, and Work Order to the right person, in real time

What Q-assign does

Q-assign is the advanced routing engine inside Ortoo Orchestrator, and a standalone Salesforce app for teams not yet running the full orchestration layer.

It pulls work from your queues, evaluates each record against your rules (skills, territory, account ownership, language, capacity, working hours, and out-of-office calendars), and assigns it to the best available user, or feeds the assignment into Salesforce Omni-Channel.

Everything is configured through a code-free interface, so operations teams adjust routing without developer time.

Where teams use Q-assign

Case assignment: match every case to the right agent on skills, language, tier, and capacity to protect SLAs.

Lead and opportunity routing: prioritise hot leads, prevent cherry-picking, and reassign neglected records.

Work order dispatch: route field jobs by territory, certification, and load, with hands-free email intake.

Shared services: route HR, IT, and finance requests on any custom object.

Key features

Object-agnostic routing

Assign Leads, Cases, Opportunities, Work Orders, and custom objects

Skills and attribute matching

Route on skills, language, territory, account, or any field

Workload-based routing

Distribute work by real capacity with load balancing and round robin

Availability aware

Assign only to users who are online, in working hours, and not on OOO

Continuous rebalancing

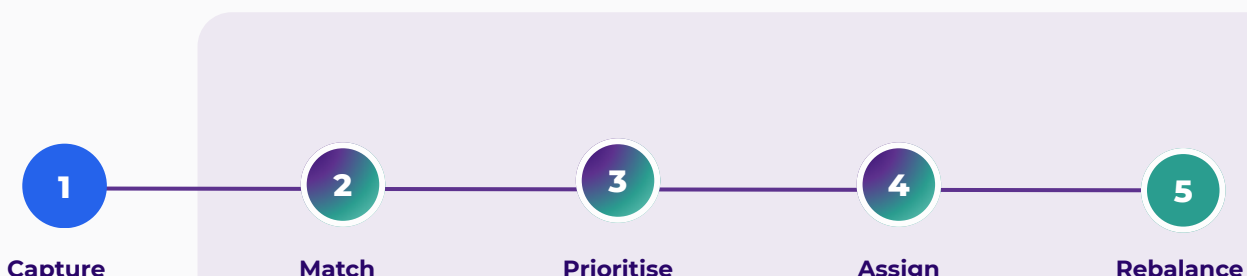
Reassign and escalate when work stalls or SLAs are at risk

Prioritisation and AI triage

Score, rank, and route on AI-extracted sentiment and urgency

Code-free setup and alerts

Configure routing without code, with Slack and Teams alerts



Every record is matched, prioritised, and assigned by your rules. Rebalance as conditions change.

Trusted by enterprises with complex Salesforce operations

Assign work with full control over how routing runs

Built for high-volume sales, service, and operations teams on Salesforce

Salesforce-native

Runs entirely inside Salesforce, using your records, queues, and security model. No external systems added.

Works with Omni-Channel

Match the right agent on rich attribute logic, then feed Salesforce Omni-Channel for delivery.

Controlled and visible

Data views and assignment history show how work is distributed and where it stalls.

Faster response times

Work is assigned the moment it lands, so first response and resolution times drop.

Balanced workloads

Capacity caps and load points prevent overload and idle agents, even at high volume.

Higher assignment accuracy

Skills, territory, and account matching put each record with the right person first time.

Less manual triage

Code-free rules remove daily hand-sorting by team leads and cut errors.

See how Q-assign would route your work?

Let's map leads and cases are assigned in your Salesforce org today, and where routing could be sharper.

Part of Ortoo Orchestrator

Q-assign is the routing engine of Ortoo Orchestrator. Add email intake and AI triage to run lead and case lifecycle management end to end.

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