Escalation Rule

An **Escalation Rule** in Salesforce is a mechanism used to automatically escalate records, typically cases, that have not been resolved within a specified time frame or under certain conditions. When a case or record meets the criteria defined in the rule, it can be escalated to a higher-level user or team for further action, ensuring that issues are addressed promptly and not left unresolved.

Why We Use Escalation Rules:

1. **Timely Resolution**: They help ensure that critical issues or cases are addressed on time, reducing the risk of delayed responses and customer dissatisfaction.
2. **Automated Workflow**: Escalation rules automate the process of routing cases to higher-level users or teams when needed, reducing the manual intervention required.
3. **Improved Efficiency**: They help maintain service level agreements (SLAs) by ensuring that cases are escalated according to pre-defined timelines, leading to faster resolutions.
4. **Accountability**: They ensure that cases do not get stuck in the system and are handed over to the appropriate person or team if the current owner isn't addressing them in time.
5. **Customizable Alerts**: You can set specific conditions under which escalation happens, such as when the case has been open for too long or when it reaches a certain priority level.

1. What is an Escalation Rule in Salesforce?

An **Escalation Rule** in Salesforce is a set of criteria that automatically escalates cases to higher authorities if they are not resolved within a specified time frame. It ensures that customer issues are addressed promptly by reassigning or notifying appropriate users.

2. What are the key components of an Escalation Rule?

The main components of an Escalation Rule are:

1. **Rule Entry Criteria** – Defines the conditions for escalation (e.g., Case Status = ‘Open’ and Priority = ‘High’).
2. **Escalation Actions** – Specifies what happens when the criteria are met, such as:
    a. Reassigning the case to another user or queue.
    b. Sending email notifications.

    c. Changing the case ownership.
3. **Business Hours** – Determines whether the escalation clock runs only during working hours or continuously.
4. **Escalation Times** – Defines when the case should be escalated.

3. How do you create an Escalation Rule in Salesforce?

To create an Escalation Rule:
1. Navigate to **Setup** → **Case Escalation Rules**.
2. Click on **New Rule** → Provide a **Name** and **Activate** it.
3. Add **Rule Entries** → Define criteria like Case Status, Priority, or other conditions.
4. Add **Escalation Actions** → Assign to a queue/user, send email alerts, or update field values.
5. Define the **Escalation Time** (Based on business hours or calendar hours).
6. Save and **Activate** the Rule.

4. What is the difference between Assignment Rules and Escalation Rules?

Feature	Assignment Rule	Escalation Rule
Purpose	Assigns a case to a specific user or queue based on criteria.	Escalates a case if it is not resolved within a defined time frame.
Triggering Event	When a new case is created or updated.	When a case meets escalation criteria (e.g., unresolved after X hours).
Actions	Assigns ownership to a user/queue.	Reassigns the case, sends notifications, or updates fields.
Timing	Happens immediately when a case is created.	Happens after a time-based condition is met.

5. How does Business Hours impact Escalation Rules?

Business Hours determine whether escalation timers run continuously or only during working hours. If a rule is set to respect business hours:
- The escalation time is calculated based on working hours, excluding weekends and non-working hours.
- If set to ignore business hours, escalation occurs in real-time (24/7).

6. What happens when an Escalation Rule is triggered?

When an escalation rule is triggered:

1. The system evaluates if the case meets the escalation criteria.
2. The escalation timer starts based on the defined hours.
3. When the escalation time is reached, the **Escalation Actions** are executed, such as:
   a. Changing the case owner.
   b. Sending email notifications.
   c. Updating the case status or priority.

7. Can we have multiple Escalation Rules active at the same time?

No, only **one Escalation Rule** can be active at a time. However, within a single rule, multiple **Rule Entries** can be defined to handle different escalation scenarios.

8. How do you stop an Escalation Rule from executing?

- **Manually resolving the case** before the escalation timer triggers.
- **Deactivating the Escalation Rule** in Setup.
- **Updating the criteria** so the case no longer meets the escalation conditions.
- **Setting "Disable Escalation" checkbox** on the Case Record to prevent escalation.

9. How do you handle escalations programmatically using Apex?

Escalation Rules cannot be directly triggered via Apex, but you can simulate them using **time-based workflows, scheduled Apex, or process builder**.
Example: An **Apex Batch Job** to check unresolved cases and escalate:

```
global class CaseEscalationBatch implements
Database.Batchable<sObject> {

    global Database.QueryLocator start(Database.BatchableContext BC) {
        return Database.getQueryLocator(
            'SELECT Id, Status, OwnerId FROM Case WHERE Status !=
\'Closed\' AND CreatedDate < LAST_N_DAYS:7'
        );
    }

    global void execute(Database.BatchableContext BC, List<Case>
```

```
caseList) {
        for (Case c : caseList) {
            c.OwnerId = '005XXXXXXXXX';  // Assign to escalation user
        }
        update caseList;
    }

    global void finish(Database.BatchableContext BC) {
        System.debug('Case Escalation Batch Completed');
    }
}
```

This batch job assigns old unresolved cases to a specific user.

10. How can you report on escalated cases in Salesforce?

You can create a **Custom Report** in Salesforce:

1. Navigate to **Reports** → Click **New Report**.
2. Select **Cases Report Type**.
3. Add Filters:
    a. **Escalated = True**
    b. **Case Status = Open/Pending**
    c. **Escalation Age** (To track time since escalation).
4. Group by **Owner** or **Status** for insights.
5. Save and run the report.

11. How do Escalation Rules work with Omni-Channel Routing?

- **Escalation Rules can reassign cases** to Omni-Channel queues.
- When a case is reassigned via an escalation, Omni-Channel can reassign it dynamically to available agents.
- **Best Practice:** Use **Skill-Based Routing** with escalation to ensure the right agents handle critical cases.

12. What are the limitations of Escalation Rules?

1. **Only works for Cases** – Cannot be used for other objects like Leads or Opportunities.
2. **Only one active rule at a time** – Unlike workflows, you can't have multiple active escalation rules.

3. **No direct Apex execution** – Escalation Rules run asynchronously and cannot be forced via Apex.
4. **Limited actions** – Unlike Flow or Apex, escalation rules can only change ownership, notify users, or update fields.

13. How do Escalation Rules interact with Case Milestones in Entitlement Management?

- **Milestones** define SLAs within **Entitlements** (e.g., resolve a case in 24 hours).
- When a case **misses a milestone**, it can trigger an **Escalation Rule**.
- **Best Practice:** Use **Process Builder or Flow** to automatically escalate cases when milestones are violated.

14. How can you optimize performance when dealing with a large number of escalations?

- **Use Queues instead of assigning to individual users** to distribute workload.
- **Leverage Scheduled Apex** to handle escalations instead of relying solely on rules.
- **Optimize criteria filtering** to reduce unnecessary escalations.
- **Monitor Time-Based Workflow Queue** to avoid delays in escalations.

15. Can we use Escalation Rules for objects other than Cases?

No, **Escalation Rules only work with the Case object** in Salesforce. If you need a similar escalation mechanism for Leads, Opportunities, or Custom Objects, you must use:

- **Process Builder** or **Flow** to trigger time-based actions.
- **Apex Triggers** or **Scheduled Apex** to reassign records based on conditions.

16. What is the difference between an Escalation Rule and an Auto-Response Rule?

Feature	Escalation Rule	Auto-Response Rule
Purpose	Escalates cases that are not resolved within a defined time.	Sends automated responses (emails) when a case or lead is created.
Triggering Event	Time-based (e.g., case remains unresolved for 48 hours).	Immediate (triggers when a case or lead is created).
Actions Taken	Reassign case, notify users, update fields.	Sends email responses to customers.

Object Supported	Only Cases.	Cases and Leads.

17. How do you track the history of escalated cases?

To track escalation history:

1. **Enable Field History Tracking** for the **Escalated** field on the Case object.
2. **Use Case History Reports** to monitor escalation activities.
3. **Create a Custom Report**:
   a. Add **Escalated = True** as a filter.
   b. Include fields like **Previous Owner, New Owner, and Status Change Date**.
4. **Use a Custom Field** to store the **Escalation Date** using a Workflow or Flow.

18. Can we use Workflow Rules or Process Builder to trigger Escalation Rules?

No, **Escalation Rules run independently** and are time-based. However, you can **simulate escalation rules using**:

- **Time-Based Workflows** (Now deprecated in favor of Flow).
- **Scheduled Flows** to update case ownership or notify users.
- **Apex Batch Jobs** for custom escalation logic.

19. How does Salesforce handle escalations when a case is reassigned before the escalation time is reached?

If a case is reassigned before the **Escalation Time**, then:

- The escalation timer **resets**, and the rule will no longer trigger.
- If the new owner does not resolve it, a new **escalation may occur** based on the updated conditions.
- If you want escalation to persist regardless of reassignment, use a **Custom Flow** instead.

20. What are the best practices for implementing Escalation Rules in a high-volume org?

- **Optimize Rule Entry Criteria** – Avoid unnecessary escalations by refining conditions.
- **Use Queues Instead of Individuals** – Reduces bottlenecks by distributing workload.
- **Monitor Time-Based Workflow Queue** – Check Setup > Time-Based Workflow to track pending escalations.
- **Integrate with Omni-Channel** – To auto-assign escalated cases dynamically.
- **Combine with Entitlements & Milestones** – Ensures SLA compliance.

Scenario-Based Questions:

21. Scenario: Your company has a 24-hour response SLA for high-priority cases. If a case is not assigned to an agent within 4 hours, it should be escalated to the support manager. How would you configure this?

1. **Create an Escalation Rule**:
   a. Criteria: **Case Priority = High** AND **Status = New**
   b. Set Escalation Time: **4 hours** (using **Business Hours**).
2. **Define Escalation Action**:
   a. Reassign case to **Support Manager Queue**.
   b. Send email notification to the **Manager**.
3. **Activate the Rule** and Test it with different cases.

22. Scenario: You need to escalate cases after 6 business hours if they remain unresolved. However, weekends should not count towards escalation time. How would you handle this?

- While defining **Escalation Rule**, set the **"Use Business Hours"** checkbox.
- This ensures that escalation happens **only during business hours**, skipping weekends.
- Salesforce calculates the time excluding non-working hours automatically.

23. Scenario: An escalated case needs to be reassigned to a senior support rep. However, if the senior rep does not respond within another 3 hours, it should escalate again to the Head of Support. How would you configure this?

1. **First Escalation Rule** (After 3 hours):
    a. Assign the case to a **Senior Support Rep**.
    b. Notify them via email.
2. **Second Escalation Rule** (After 3 more hours):
    a. Assign the case to the **Head of Support**.
    b. Mark the case as **Critical**.
    c. Send an SMS alert via a **Custom Flow or Apex Trigger**.

24. Scenario: You need to prevent certain VIP customer cases from being escalated. How can you do this?

- Add a **"Do Not Escalate"** checkbox field on the **Case** object.
- Modify the **Escalation Rule Entry Criteria** to exclude cases where **Do Not Escalate = True**.
- Alternatively, create a **Validation Rule** that prevents escalations on VIP accounts.

25. Scenario: You need to report on all cases that were escalated but later closed within SLA. How do you achieve this?

1. Create a **Custom Report on Cases**.
2. Add filters:
    a. Escalated = True
    b. Case Status = Closed
    c. **Resolution Time ≤ SLA Time** (Using a formula field).
3. Use a **Custom Formula Field** to track if the resolution met the SLA:

```
IF(TIMESTAMPDIFF(HOUR, Escalation_Time__c, Closed_Date__c) <=
SLA_Hours__c, "Met SLA", "Breach")
```

4. Add **Charts & Dashboards** to visualize trends.

26. Scenario: Your company supports multiple time zones. How do you ensure escalations happen at the right local time?

- Enable **Business Hours per Region** in **Setup > Business Hours**.
- Assign **Different Business Hours** for different case types or locations.

- Escalation rules will now follow the respective region’s **working hours** instead of UTC time.