

LeanData Routing

Time-Based Routing Node



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Overview

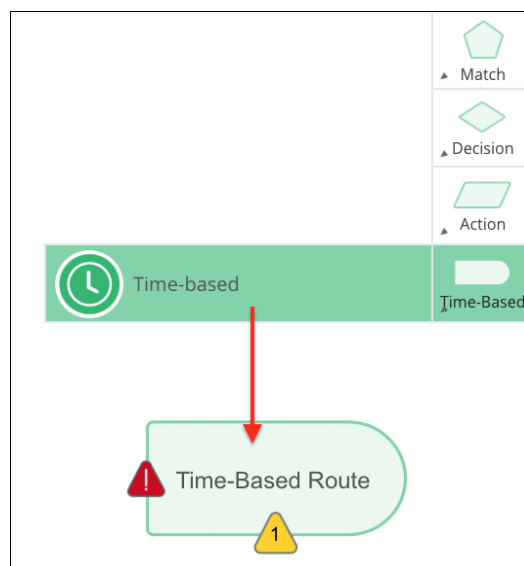
LeanData's Time-Based routing functionality extends the capabilities of Router, allowing users to evaluate routing criteria after a specified time frame. Records will be held until the designated time has elapsed, after which it will evaluate a predetermined set of logic captured in the new Time-Based Route node.

Time-Based routing will help to prevent Leads from stagnating, drive accountability for reps to follow up with their Leads quickly by rerouting records to a different rep after a certain time frame, or simply to incorporate customized wait steps into your routing configuration.

Please Note: Starting with LeanData version 1.557 and onwards, the functionality of the Time-Based node will be replaced with the [Hold Until Node](#). Existing Time-Based nodes will continue to operate normally, but please transition your use of Time-based capabilities to the improved Hold Until Node. Here is an [article](#) detailing the change.

Configuring a Time-Based Route Node

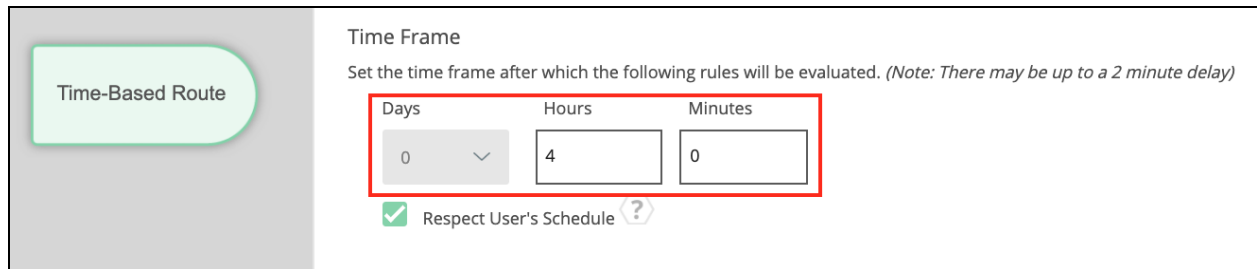
If Time-Based routing has been enabled as a part of your LeanData subscription, you will see the Time-Based Route node available in the Node Bar in the upper right corner of any router flow. Drag a Time-Based Route node into your active flow to begin configuring your time-based criteria.



Setting a Time Frame

After opening the node to edit, in the dropdowns, pick a time frame after which you would like to check your conditions. Currently, 5 minutes is the smallest time frame we can support, and 30 days is the largest time frame we can support in any one Time-Based Route node.

Please note that there may be a delay of up to 2 minutes in addition to the specified time frame.



Time-Based Route

Time Frame

Set the time frame after which the following rules will be evaluated. *(Note: There may be up to a 2 minute delay)*

Days	Hours	Minutes
0	4	0

Respect User's Schedule ?

Respecting User's Schedule



When the Respect User's Schedule option is selected, the Time Frame will only elapse during the current owner's Schedule (Working Hours, Vacations, and Holidays). To adjust the Schedules, visit People > Users > Schedules.

For example, if the Time Frame is 4 hours, the owner's Schedule is 9AM-5PM, and a record enters this node at 3PM on a Friday, only two of the four working hours will have elapsed by the end of the day. On Monday at 9AM, the following two hours will elapse and evaluate the condition at 11AM that Monday.

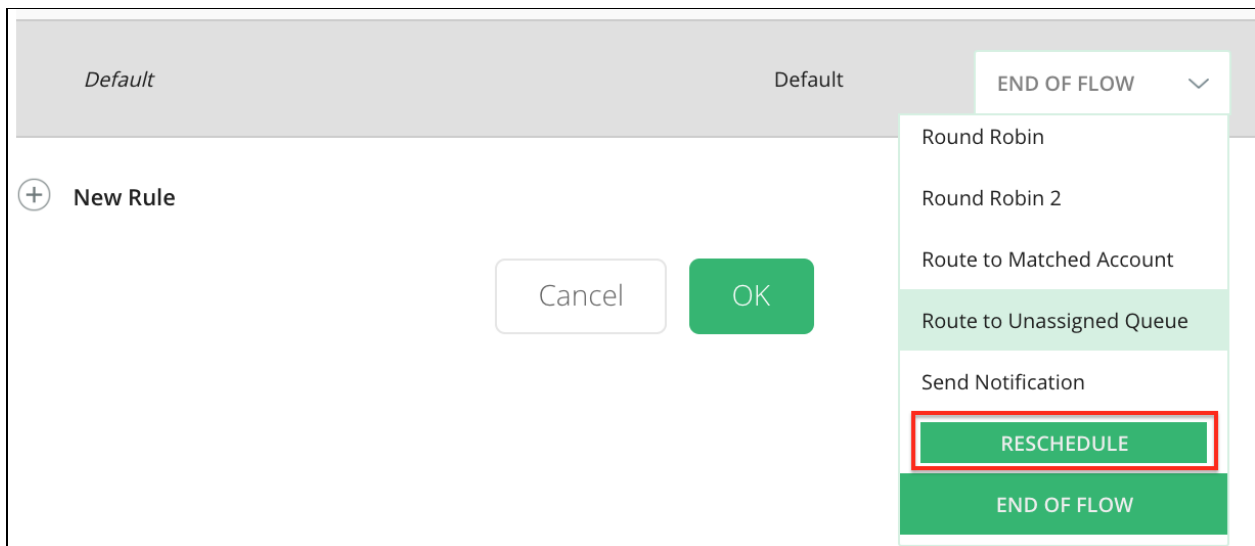
Setting your Conditions

Define the conditions you would like to evaluate after the specified time frame. This section operates as a branch decision node and you can include as many rules as you would like. After the specified time frame, LeanData will evaluate your rules in the order they are listed, and follow the path for whichever rule is met.

Condition	Label	Target
↕ (Status equals Unqualified)	Status = Unqualified	Re-Round Robin ▾
↕ (Status equals Working)	Status = Working	END OF FLOW ▾
↕ (Status equals Rejected)	Status = Rejected	Route to Unassigned Qu... ▾
Default	Default	END OF FLOW ▾

+ New Rule

Within the “Target” dropdown, where you would typically specify the next node to point a record towards for the given condition, you will notice an option for “Reschedule”



The screenshot shows a close-up of the 'Target' dropdown menu. The menu is open, displaying several options: Round Robin, Round Robin 2, Route to Matched Account, Route to Unassigned Queue, Send Notification, RESCHEDULE, and END OF FLOW. The 'RESCHEDULE' option is highlighted with a red rectangular box. In the background, a dialog box with 'Cancel' and 'OK' buttons is visible, and the 'New Rule' button is also present.

Selecting this option will restart the time frame specified earlier in the node, and re-evaluate the conditions again after waiting for the specified time frame. LeanData will continue to re-evaluate the record at the specified time interval for as long as that record continues to satisfy the conditions that point to the “Reschedule” outcome.

If you would like to use a different time frame for subsequent evaluations, you can direct records to another Time-Based Route node with a different time frame.

If you would like to set different conditions for subsequent evaluations, you can also direct records to another Time-Based Route node with different conditions.

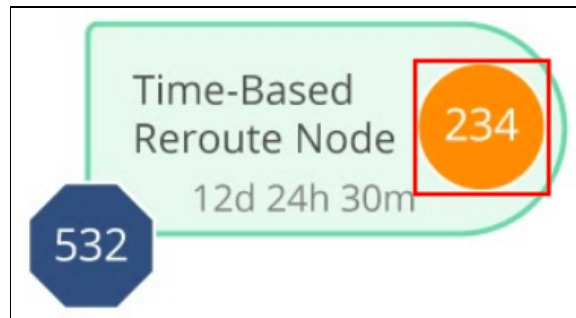
Please note that a record can only be subject to one Time-Based condition at any given moment.

Time-Based Metrics & Logs

In addition to being able to add time-based decisions to your Router flow, LeanData will allow you to track records that are pending evaluation in the Routing Insights and Audit Logs pages.

Routing Insights

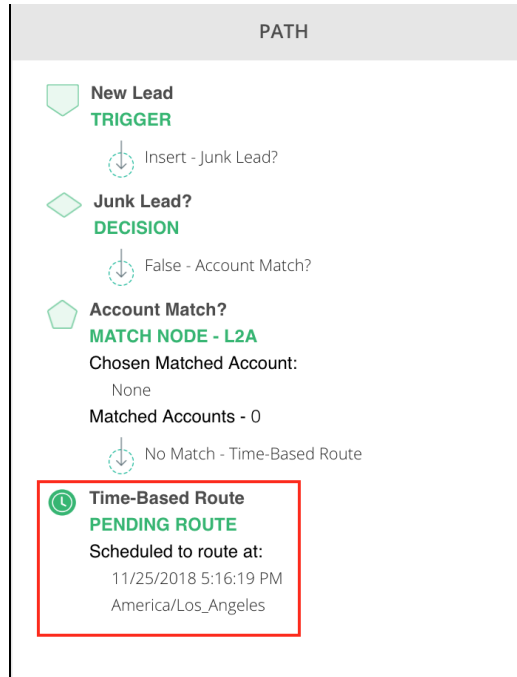
Records that are currently subject to a time frame specified in a Time-Based Route node will be indicated by a counter on the Time-Based Route node itself. This will detail how many records are still waiting to be processed via that Time-Based Route node.



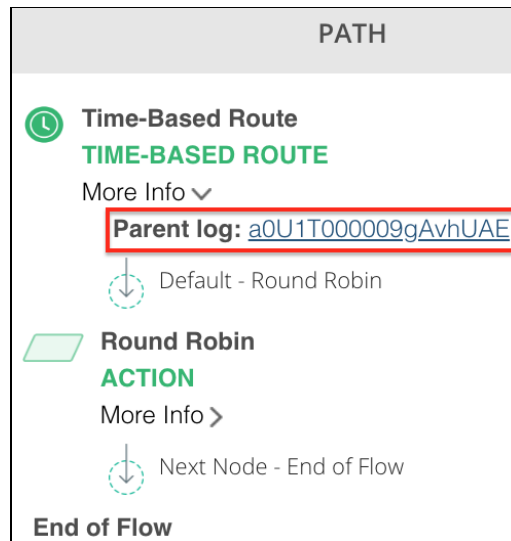
Please note, the use of a Time-Based Route node may create a situation where a record may enter via a particular version of your Router flow, but may not be finished evaluating until a subsequent version of your Router flow. Please note that this may cause some of the metrics for records processed in a particular deployment to appear higher than the number of records that entered that deployment.

Audit Logs

Within the Audit Logs page, records that are still pending due to a Time-Based Route node will display with a “Pending Route” status in the Path Column. The time at which the record is scheduled to be evaluated will also be displayed.



After the specified time frame, the record will be evaluated and if the record is not rescheduled for another time frame and a final action is taken, another log will be generated showing the routing outcome and detailing the path from the Time-Based Route node onward. If you expand the “More Info” section, you will see a link to the Parent Log that triggered the initial routing process.



FAQs

Can you schedule a Time-Based Route node for a specific date/time?

Currently, a Time-Based Route node can only schedule a time frame relative to the time a record is initially evaluated in the flow and cannot support a specific date or time.

How will this affect records that are triggered to route via an update condition?

Records can still be routed via an update condition without affecting the scheduled evaluation. If a record is scheduled to be evaluated, it will not prevent that record from getting routed otherwise. If you need to prevent this scenario, you will have to design your update conditions or your time-based criteria with this in mind.

Can a record be scheduled for two different time frames at the same time?

No. If a record that is currently within a time frame set by a Time-Based Route node happens to re-enter the LeanData routing process and proceed to a Time-Based Route node, the initial time frame will be canceled and the second time-frame will be scheduled. A particular record can only be subject to one time frame at any given time.

If I modify a Time-Based Route node and deploy a new Router flow, will this affect records that were previously scheduled?

Possibly. If you either change the name of a Time-Based Route node or add, edit, or modify a condition using the “has changed” operator within the node, all the records that were scheduled to be evaluated via the previous version of that node will no longer be evaluated, and no further action will be taken.

If you edit conditions other than “has changed” conditions, records will be subject to the new conditions at the time of evaluation.

If you only change the time frame in the node, records will still be subject to the original time frame before the edit.

Do Time-Based Route nodes account for working hours or weekends?

If you have the Respect User Schedules option enabled in the Time-Based Node, the hours and minutes set in your timeframe will only elapse during the current owner’s schedule.

Will LeanData remember matches made in a Match node before a record enters the Time-Based Route node?

No, because many factors can change while a record is pending in a Time-Based Route node, a match found prior to entering the Time-Based Route node might no longer be the best match when the time frame has elapsed.

Best Practices

- When utilizing the Updated entry node, please note that records that are currently awaiting a decision in a Time-Based Route node will still be evaluated at the scheduled time. You may want to ensure that your Updated entry node conditions exclude records that would otherwise be affected by a previously scheduled Time-Based action, or ensure that your Time-Based Route node excludes criteria that might satisfy an Updated condition.
- If you have utilized a Match node prior to entering a Time-Based Route node, LeanData will not retain the found match when the record is re-processed after the time frame. If you wish to reference a matched record, you will have to direct records through a Match node again after they exit the Time-Based Route node.