LeanData Routing

Multi-Graph Routing
Utilities Guide

Overview

This guide is an overview of LeanData's Multi-Graph Routing utilities. Multi-Graph Routing gives you the ability to deploy different LeanData Router graphs for different Business Units for each LeanData-supported object, instead of having just one graph for all Business Units. This allows different Business Unit Admins access to their own portion of the overall configuration without affecting other Business Units. This guide will walk you through copying your set up from a sandbox to your production environment and the tools you have to manage a Multi-Graph router setup.

Please Note: This guide is designed to work with the Multi-Graph Implementation Guide.

Permissions

Applies exclusively to Objects with Multi-Graph enabled.

	Business Unit Admin	**LeanData Admin**
Product Access / Task		
FlowBuilder	Y (Own)	Y
Routing Insights & Deployment History	Y	Y
Audit Logs	Y	Y
One-Time Routing	Y (Own)	Y
Advanced Settings: Merge Dupes, Account Creation, Owner Mappings, Account Teams	N	Y
Territory Segment	Y (Own)	Y (All)
Round Robin Pools	Y (Own)	Y (All)
Attribution Settings	N	Y
Match Settings	N	Y

For Objects without Multi-Graph enabled, LeanData provides the following Permissions to the BU Admin.

	Business Unit Admin
Product Access / Task	
FlowBuilder	Y (Own, Draft Graphs Only)
Routing Insights & Deployment History	Y
Audit Logs	Y
One-Time Routing	N
Advanced Settings: Merge Dupes, Account Creation, Owner Mappings, Account Teams	N
Territory Segment	Y (Own)
Round Robin Pools	Y (Own)
Attribution Settings	N
Match Settings	N

Migrate from Sandbox to Production

This section is used when you want to create your changes in a Sandbox Organization and then move the changes to your production organization. The following is a high-level checklist of the steps to migrate to Multi-Graph changes from Sandbox to Production, as needed. We will dive into more detailed steps later in this guide. Process overview:

1. Set up the organization
2. Import/Export Round Robin Pools
3. Create Territories
4. Import the Graphs
5. Prepare to Go-Live

Please Note: As needed, please use the instructions from the Multi-Graph Implementation Guide to set up the organization in your testing environment.

Import Round Robin Pools

There are two options available, importing all Pool Settings and Schedules or Importing Selected Pools only.

Import Round Robin Pools

1. Option 1: Import ALL Pool Settings and Schedules
    a. Navigate to LeanData > Admin > Settings > Export Settings in the original org.
    b. Configure settings as needed.
    c. Export the settings.
    d. In the new org, navigate to LeanData > Admin > Settings > Import Settings from the original org.
2. Option 2: Import selected Pools only
    a. In the original org, navigate to LeanData > Round Robin > Pools > Check the desired Pools > Export Pools
    b. In the new org, import the file with Pools and Pool Settings.

Create Territories

Import the Territories for each BU, if applicable.

Create Territories:

1. In the original org, navigate to the LeanData app.
2. Click on Routing to expand the menu.
3. Click on Territory Management.
4. Select the desired Territories.
5. Click on Export to export the selected territories.
6. In the new org, create the new Territories, associate it with the correct Business Unit, and upload the exported CSVs from this step.

Import the Graphs

Copy the graphs from the sandbox to the new organization in production.

Export/Import the Graphs:

1. In the original org, navigate to the LeanData app.
2. Click on Routing to expand the menu.
3. Click on Leads to expand the menu.
4. Click on FlowBuilder.
5. Click on a desired graph icon.
6. Click Export. Each graph will export to your computer.
7. In the new org, import each graph into its respective Business Unit.

Prepare to Go-Live

Check the BU Settings for each BU, ensure every BU with a Graph has a graph associated and deployed as “Ready to Go Live”.

1. Check the One-Time BU Tagging Job and ensure all Leads have been tagged as expected.
2. Enable Multi-Graph Routing for Leads.
3. Create a Test Lead to test the functionality.

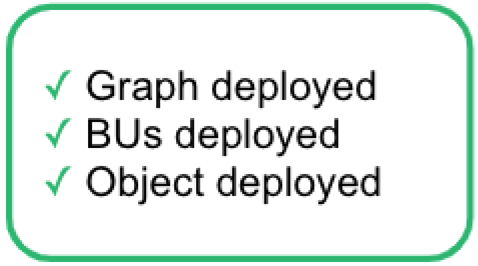
Multi-Graph is Enabled

Now that multi-graph routing is enabled the following will begin:

1. LeanData will automatically tag incoming records with a Business Unit.
2. LeanData will then route the record through the selected Business Unit’s Graph.

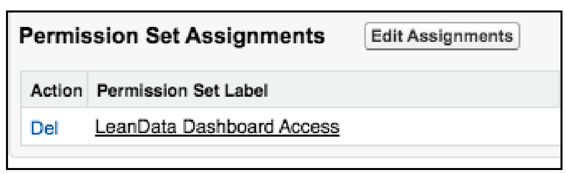
3. Records will “remain” in a Business Unit Graph. When the record is updated, it will go through the update Trigger of the Business Unit Graph if the conditions are met.

Please Note: One-Time BU Tagging is now only needed if Business Unit conditions change.



Business Unit Admin Permissions

When a LeanData Admin adds a BU Admin, LeanData automatically adds a visible permission set: LeanData Dashboard Access to the BU Admin. LeanData also automatically adds additional access to the Business Unit/Graphs.



Operational Tools

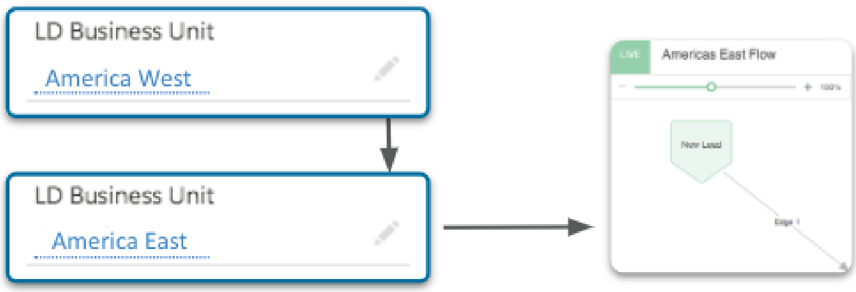
The tools detailed in this section will help you manage Business Units in LeanData.

- New Lead Trigger Node
- One-Time BU Tagging
- One-Time Routing
- Audit Logs
- Routing Insights & Deployment History
- Advanced Settings
- Salesforce Reporting

New Lead Trigger Node:

Under the following conditions, a record will be routed, through the New Trigger of an updated Business Unit graph:

1. When Business Units are deployed for the object (Leads, Accounts, etc) **and**
2. Multi-graph is enabled for the object **and**
3. LeanData Business Unit Lookup field is updated (via One-Time BU Tagging, manual or LeanData update)



If the Business Unit is unchanged and the record meets the conditions of the Update Entry Node of the BU's graph, the record will be routed through the Update Entry Node.

One-Time BU Tagging:

- **Common Use Case:** Utilize BU Tagging when organization alignments change - for example, when your organization adds a new geographical Business Unit. BU Tagging allows for an efficient migration of Leads from one BU to another.
- This is one of two ways to move Leads across Business Units. The other way is by manually updating the Business Unit Lookup field
- **IMPORTANT STEP:** If you'd like to prevent "New Lead" Routing when Leads move from one Business Unit, please build in preventative measures in the graph like filters.
- Add a filter for the New Lead Trigger: **Created Date NOT EQUAL to today's date**

One-Time Routing:

- Send a list of existing records through a LeanData Router Graph by uploading a list of object IDs. They will be routed based on the rules and path you select.
- Requirements of One-Time Routing:
  - LeanData One-Time Routing can route to one Business Unit at a time.
  - If Leads in the uploaded CSV are not in the selected Business Unit, LeanData will not route it.
  - If you upload the same CSV multiple times for multiple Business Units, LeanData will still route the records that belong in the selected BU.
    - For example, you have 10 Leads in Business Unit A, and 5 in Business Unit B in one shared CSV. You select Business Unit A's graph for routing; LeanData routes 10 Leads, and ignores the other 5. You then select Business Unit B's graph for routing; LeanData routed 5 Leads, and ignores the other 10. Now, all 15 have been routed.
- If the Leads are not yet stamped with a Business Unit, run One-Time BU Tagging, as outlined in Step 4.
- Only one object type can be routed at a time (all IDs in the list must start with the same three characters).
- An object is selectable in the Object Type list when it has a deployment with enabled Business Unit(s).
  a. Admins cannot route to a Single Graph if Multi-Graph Routing is enabled.
  b. Admins cannot route to Business Unit Graphs if Single Graph is enabled.
  c. Once the user initiates One-Time Routing, a table at the bottom of the page will update with the status details. Refresh the page to see the most up-to-date status and information.

Audit Logs:

- BU Admins and LD Admins can view Audit Logs for every record routed by LeanData
- Filter Audit Logs by Business Unit with the Business Unit Filter
- View the Business Unit assigned in the left-hand column of Audit Logs

Routing Insights & Deployment History:

- BU Admins and LD Admins can view Routing Insights for all Business Units
- Filter Routing Insights by Business Unit with the Business Unit Filter

Advanced Settings:

- Advanced Settings are currently only available to LD Admins
- LD Admins can configure Owner Mappings, Account Teams, Merge Duplicates, and Account Creation Settings

Salesforce Reporting:

- Build Reports off of the Leads object and add a filter on the field created in Step 1
- Filter by select Business Units as needed
- Create Dashboards and display Leads routed by BU
- Repeat this exercise for every object as necessary

Summary

This guide has provided an overview and walked you through the steps needed to migrate your Multi-Graph setup from a sandbox organization to your production environment. Additionally, we have reviewed the tools available for managing your Multi-Graph setup.