LeanData Routing

Multi-Graph Routing
Implementation Guide

Overview

This guide is an overview of implementing LeanData's Multi-Graph Routing solution. Multi-Graph Routing gives you the ability to deploy different LeanData Router flows for different Business Units for each LeanData-supported object, instead of having just one flow for all Business Units. This allows different Business Unit Admins access to their own portion of the overall configuration without affecting other Business Units. We encourage you to to test any changes like this in a sandbox environment first. The instructions below work in either a production environment or a sandbox. Our Multi-Graph Routing Utilities Guide will walk you through copying your Multi-Graph setup from a sandbox to your production organization.

Definitions

- **Business Units (BU)**: A group that manages a segment of records (Leads, Accounts, Contacts, Opportunities, or Cases). A segment includes (routed object) records with fields that meet the conditions set by the LeanData Admin.
    - An example of a Business Unit is: Americas - West
    - An example of conditions that a customer may use to define the segment of records that fall under this BU is: Lead State = California, Oregon, Washington
- **Objects**: LeanData supported objects - Leads, Contacts, Accounts, Opportunities, Cases. These objects have records that can be routed.
- **Deployed Graph:** LeanData allows for multiple saved Router Flow Graphs, however, under a Single Graph setup, you can only deploy 1 graph per object to be used for continuous routing.
- **Multi-Graph**: Multiple Graphs deployed per object. You may have one deployed graph per Business Unit per object
- **Single Graph:** Configuration that only utilizes 1 deployed graph per object
- **LeanData Admin:** User with the LeanData Custom Object Full Access Permission Set.
- **Business Unit Admin:** User who will only have access to graphs for specific Business Units. Assigned by LD Admins.

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

Implementation Process and Checklist

Set up Multi-Graph Routing

There are several ways to implement the multi-graph changes. You can build this from scratch in your production organization or you can build it in a sandbox environment and move the changes into your production organization. The steps in this guide will cover both ways. The Multi-Graph Utilities Guide will help you migrate your setup to production.

The following is a high-level checklist of the steps to migrate to Multi-Graph. We will dive into more detailed steps in the following pages. Process overview:

1. Create a Business Unit Lookup field on the object / Identify the object(s) you would like to enable for Multi-Graph
2. Create a Business Unit and assign a BU Admin
3. Add BU Conditions & Enable Business Units
4. Run BU One-Time Tagging
5. Copy/Create Pools & Territories with BUs
6. Create & Deploy a Graph for every BU
7. Enable Multi-Graph Routing for Objects

Please Note: You will need a user with LeanData Admin Access and a user that is a Business Unit Manager to complete this set up.

Step 1 Create a Business Unit

Business Units are added to your Router flows to keep records from different groups separated. Records cannot switch between Business Units, unless the Business Unit Tagging field (see Step 4 below) changes, which can happen with a manual change OR with LeanData's One-Time Business Unit Tagging feature. This is to prevent records from switching between owners and Business Units sporadically. In this section we will be adding a BU lookup field on the Leads.

Create a Business Unit Lookup field on the object(s):

1. In Salesforce, click on ***Setup***.
2. In the ***Quick Find field***, enter ***Object*** and find Objects and Fields.
3. Under Objects and Fields, click on ***Object Manager***.
4. Click on ***Lead***.
5. Click on ***Fields & Relationships***.
6. Click ***New***.
7. Select the ***Lookup Relationship*** type.
8. Select LD Business Unit from the **Related To:** list. Business Unit is added by LeanData with the upgrade to the LeanData version with Multigraph.
9. Click ***Next***.
10. Enter a **Field Label** and a **Field Name**, such as Business Unit Name. Salesforce will offer a sample Label and Name like LD Business Unit. This field name is already in use.
11. Leave the option, ***Always require a value in this field in order to save this record***, blank.

12. Select an option for ***What if the lookup record is deleted?***.
13. Click ***Next***.
14. Select the field ***Visibility*** options.
15. Click ***Next***.
16. Select the **Page Layout** options.
17. Click ***Next***.
18. Click ***Save***.
19. Repeat this process for every object needed for Multi-Graph Routing.

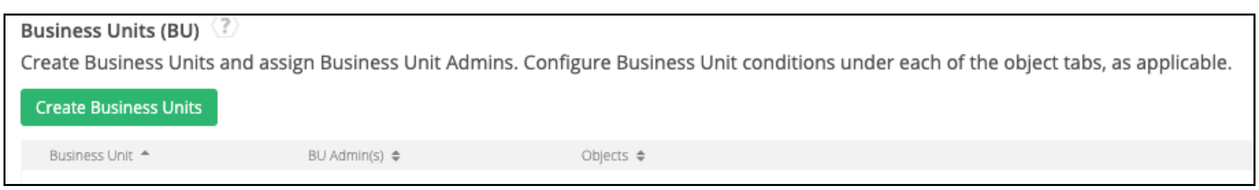
Step 2: Create a Business Unit and a BU Admin

In this step we will be adding Business Units and a BU admin to manage the Business Unit settings.

To create a Business Unit and assign a BU Admin:

1. Open the LeanData App.
2. Click on **Routing** to expand the menu.
3. Click on **Multi-Graph** to expand the menu.
4. Click on **Business Units (BU)**.
5. Scroll to the bottom table and click **Create Business Units**.
6. Enter a **Business Unit Name**, such as Americas West.
7. As needed, add one or more **Business Unit Admins**. BU Admins will receive the permissions designated in the Permissions Table (Page 3).
8. Configure the **Set as Default BU** setting, as needed:
    a. The Default is the only Business Unit which does not require conditions. All other BUs do.
    b. The default BU can capture all Leads that do not meet any other BU's Conditions as a fallback. The Admin can evaluate whether the setup missed a Segment with a Salesforce Report and create another Business Unit as necessary.
    c. Only one BU can be marked as the default.

Please Note: LeanData only allows customers to enable 10 Business Units per object and 1 default Business Unit across all objects.



Step 3: Add BU Conditions & Enable Business Units

In this step we will be adding the conditions that will send records to the correct BU.

Add BU Conditions & Enable Business Units:

1. On the Business Units Settings page, click on **Leads** (at the top of the page) to open the Leads tab.
2. Add Conditions for each Business Unit to be enabled:
    a. Click on **Add Conditions** under the desired BU.
        i. Select the Lead Field.
        ii. Set the Operator.
        iii. Set the value for the condition.
        iv. Repeat as needed for additional conditions.
        v. As needed, set the Rule Logic for multiple rules.
        vi. Example Conditions for Americas West are: State equals California, Oregon, Washington.
        vii. Click **Done** to save changes to the Business Unit.
    b. To deploy the new Business Unit, click the On/Off toggle to change it to On.
    c. Repeat as needed for other Business Units.
    d. When all changes have been made, click **Save Draft** at the top of the page.
    e. Click the **Deploy** button to deploy the Business Units and their conditions.

Please Note: If your organization utilizes State and Country Picklists in Salesforce and you'd like to utilize these fields for Business Units, please use the State and Country Codes instead of the picklists. For more information on State and Country picklists see Salesforce's help: https://help.salesforce.com/articleView?id=admin_state_country_picklists_overview.htm&type=5

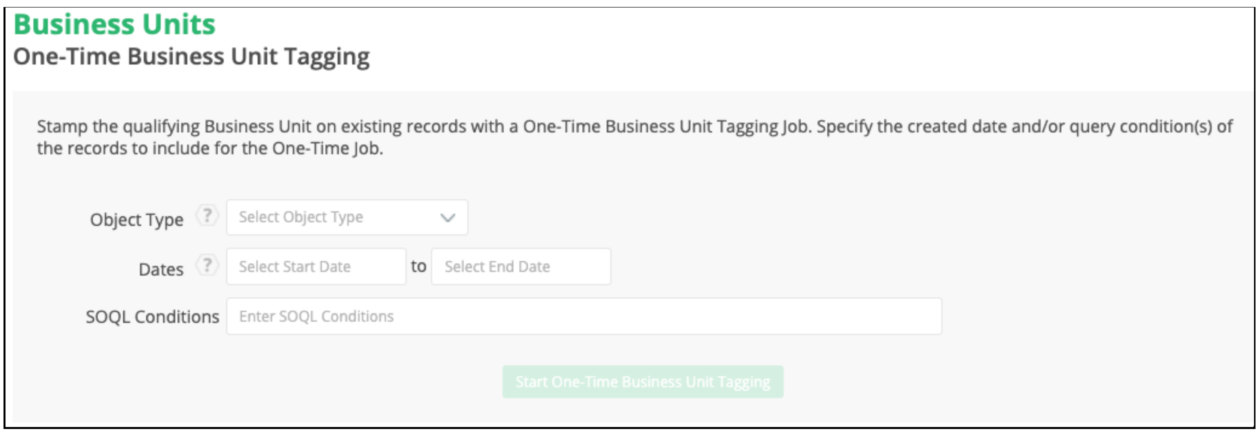
Step 4: Run BU One-Time Tagging

We need to stamp all existing Leads (or other objects) with a Business Unit so that LeanData can route existing records, in addition to new ones, with the correct Business Unit. Before running One-Time Tagging, make sure all relevant Business Units are enabled (see Step #3), as LeanData only stamps enabled BUs on records.

Please Note: Running One-Time BU Tagging will occupy 1 of 5 Salesforce Apex Jobs - consider running it after business hours to minimize impact).

Run One-Time BU Tagging

1. In the LeanData App, on the side navigation, click on **One-Time BU Tagging**.
2. Select the **Object Type** from the pull-down menu.
    a. An object is selectable in the Object Type list when it has a Tagging Field created AND a Business Unit Settings deployment with an enabled BU.
3. As needed, select a **Start** and **End** date:
    a. Both can be left blank. When left blank, LeanData will stamp all records that exist in the org.
    b. If you populate **Start Date** only, LeanData will stamp records created from and after the selected date. If you populate **End Date** only, LeanData will stamp records created on and before that date.
4. As needed, enter **SOQL conditions** to indicate which records should be tagged. Leave empty to tag all records that meet your object and date parameters.
5. Click the **Start One-Time Business Unit Tagging** button.

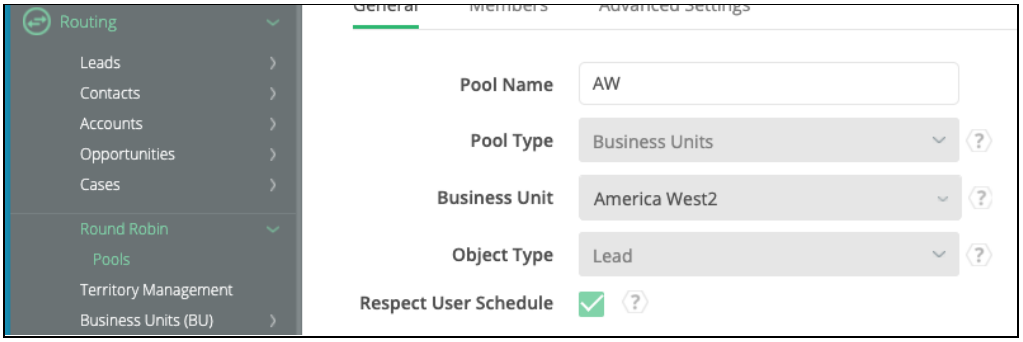


Step 5: Copy/Create Round Robin Pools & Territories with BUs

You will need to migrate existing standard Robin Pools and Territories into BU-specific Pools. Pools/Territories must belong to the BU for use in the BU Graph.

1. On the side navigation, click on **Round Robin** to expand the menu.
2. Click on **Pools**.
3. Create a new pool or edit an existing pool.
4. Change the **Pool Type** to Business Units.
5. Select the desired Business Unit on the Pool. **Once selected and saved, no users can change the BU unless a new copy is created.**
6. The Pool will now be selectable in the BU's Graph:
    a. For example, if you copy a Pool for the Americas West Business Unit, in the Americas West Graph, we can now select that Pool in the Round Robin Node. Americas Central cannot select that Pool because of the Business Unit.
7. As needed, repeat the steps for additional Pools and Territories:

a. Only Territories with segments may be copied.
b. Only Pools that belong to the same BU can be selected in the Territory Segment.

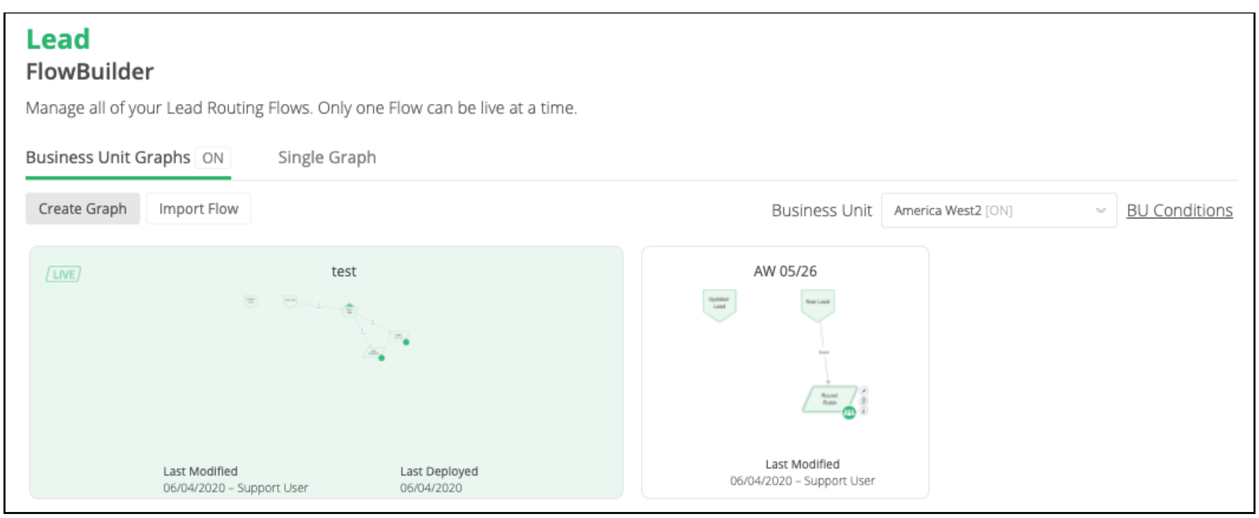


Step 6: Create & Deploy a Graph for Every BU

Until this point, all actions require the LeanData Admin. Step 6 changes to the features controlled by the Business Unit Admin. The BU Admin or LD Admin can now create a graph for the object.

Create & Deploy a Graph for every BU:

1. On the side navigation, click on **Routing**.
2. Click on **Leads** (or any other desired object to route).
3. Click on **FlowBuilder**.
4. Select the **Business Unit**.
5. Create/Import/Copy an existing graph.
6. Add the unique Routing paths for the Business Unit Leads.
7. Save the graph.
8. Once validated and saved, the graph can be deployed. Navigate to the FlowBuilder tiles page and deploy the graph.



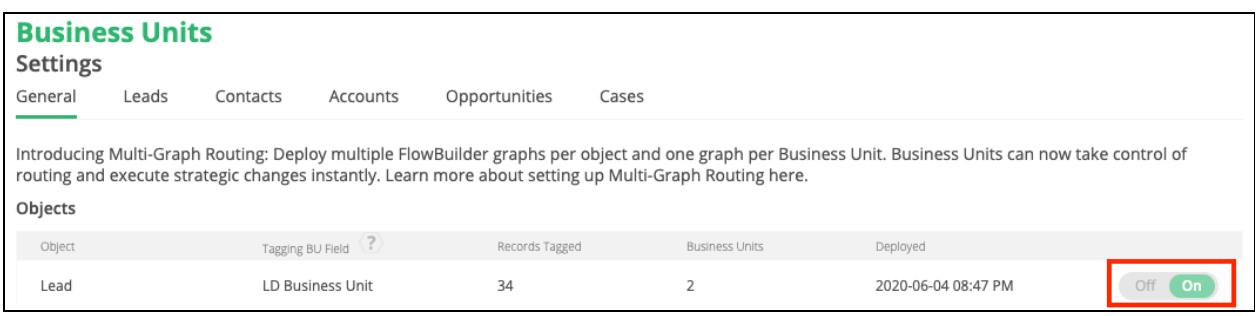
Step 7: Enable Multi-Graph Routing for Leads

For step 7, you need to switch back to the LD Admin role. As needed, deploy a graph for each needed BU. You may have already completed this in the previous steps.In order for an object to be live, the following must be enabled:

- Deployed graph for the BU (recommended)
- The Business Unit in the Objects Tab
- The Object in the General Tab

Enable Multi-Graph Routing for Leads:

1. In the side navigation of the LeanData App., click on **Multi-Graph**.
2. Click on **Business Units (BU)**.
3. Click on the **Leads** tab.
4. To deploy the new Business Unit, click the On/Off toggle to change to On.
5. Repeat as needed for other Business Units.
6. When all changes have been made, click **Save Draft** at the top of the page.
   Recommended: Enable BUs with deployed graphs only.
7. Click the **Deploy** button.
8. Confirm the action by clicking Yes, Deploy.
9. Repeat as needed for every object and Business Unit.
10. Multi-Graph Routing is now live in your Salesforce organization.

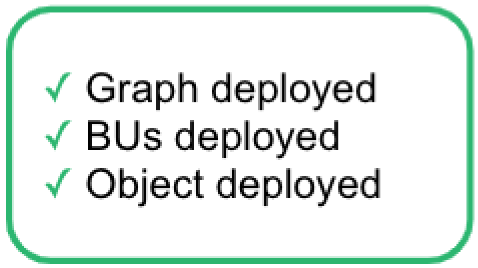


Multi-Graph is Enabled

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.



Summary

This guide has provided an overview and walked you through the steps needed to migrate from a Single-Graph Router configuration to a Multi-Graph configuration to accommodate different Business Units. Multi-Graph Routing gives you the ability to deploy one graph per Business Unit for each LeanData-supported object.