

How to Go Live with LeanData



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Overview

The below is a high-level description of how to set LeanData products Live in your Sandbox or Production environments.

Definitions

General definitions of various terms used.

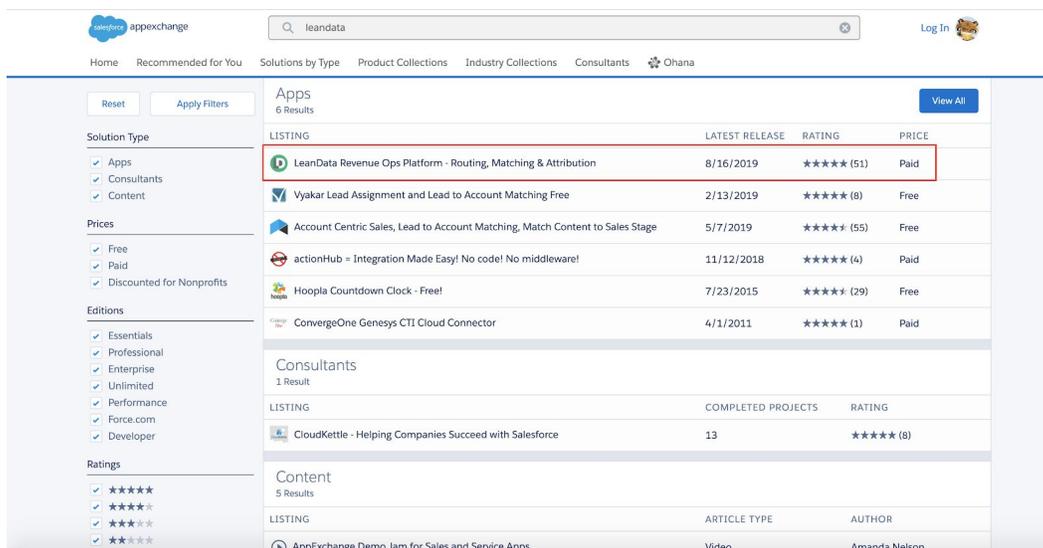
- **Product is “Enabled”**
 - Product is turned on but not currently processing anything. For example, router is ready for customization but not currently live and processing Leads.
- **Product is “Deployed” or “Live”**
 - Product is on and processing information, for example tagging or routing Leads.
- **Integration User**
 - The Salesforce User account which LeanData will operate under. All of LeanData’s actions will be logged under this User. This can be a dedicated User if you have the licenses for it. It can also be one of your existing Users, if needed.

Prerequisites to Going Live

There are a couple of steps that you must take prior to going live, these are described below.

Downloading the LeanData App

As with any Salesforce app, the LeanData app must be downloaded from the Salesforce AppExchange. [More detailed instructions on downloading the app can be found in Zendesk as well.](#)



The screenshot shows the Salesforce AppExchange search results for 'leandata'. The search results are categorized into Apps, Consultants, and Content. The 'Apps' section is highlighted, showing a list of applications. The first application, 'LeanData Revenue Ops Platform - Routing, Matching & Attribution', is highlighted with a red box. The table below shows the details of the top results:

LISTING	LATEST RELEASE	RATING	PRICE
 LeanData Revenue Ops Platform - Routing, Matching & Attribution	8/16/2019	★★★★★ (51)	Paid
 Vyakar Lead Assignment and Lead to Account Matching Free	2/13/2019	★★★★★ (8)	Free
 Account Centric Sales, Lead to Account Matching, Match Content to Sales Stage	5/7/2019	★★★★★ (55)	Free
 actionHub = Integration Made Easy! No code! No middleware!	11/12/2018	★★★★★ (4)	Paid
 Hoopla Countdown Clock - Free!	7/23/2015	★★★★★ (29)	Free
 ConvergeOne Genesys CTI Cloud Connector	4/1/2011	★★★★★ (1)	Paid

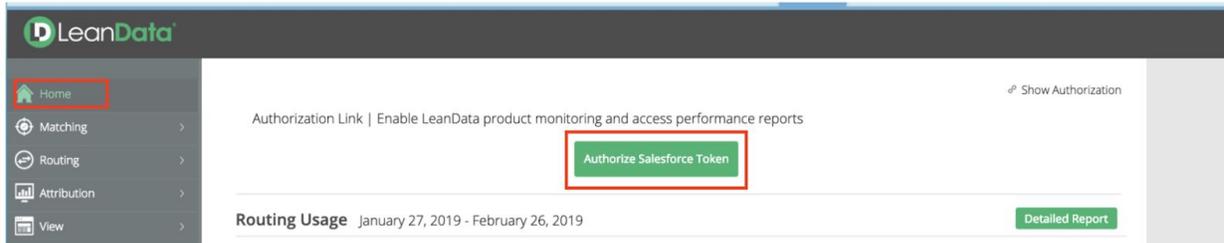
The 'Consultants' section shows one result: 'CloudKettle - Helping Companies Succeed with Salesforce' with 13 completed projects and a 5-star rating.

The 'Content' section shows 5 results, including a video titled 'AppExchange Demo Jam for Sales and Service Apps' by Amanda Nelson.

- Many times you will want to test LeanData products in a Sandbox prior to going Live. If this is the case, you'll want to download it both in the Sandbox and Production environments.
- Downloading the app kicks off a Search Indexing job which modifies custom LeanData Search Index fields on Leads, Accounts and Contacts. The amount of time that this job takes depends on how many records you have in your system. You can track the progress of this job by going to Apex Jobs and searching for the job called "PopulateAccountEmailDomainBatch." For best results, this job should finish before you set LeanData Tagging and Routing products live.

Authorizing a Salesforce token in LeanData

If you are planning on operating with a Standard LeanData Security configuration, you must authorize a Token. Authorizing a token is quick and easy, and ensures that your LeanData team has the ability to sync LeanData-related settings to your organization and has visibility for troubleshooting. [Instructions on how to do so can be found here.](#) We do not store any of your data.



- Once you've authorized a token, please contact your Implementation Consultant or for Self-Service Implementation customers email implementationhelp@leandatainc.com to enable LeanData.

LeanData Tab Visibility and Permission Sets

Configure LeanData Tab visibility and LeanData Permission Sets in order to start customizing LeanData products. [Guidance on these items can be found in the LeanData Admin Guide.](#)

Manage Permissions

Assign Permission Sets

Assign the Permission Set "LeanData Custom Objects Read-Write" to the Profiles associated with the page layouts where you've placed the LeanData View. Click "Save Permission Set Assignments" when you are done. If you prefer, assign the Permission Set to all Profiles so the LeanData View automatically becomes visible to users once it is placed on additional layouts. Email customersuccess@leandatainc.com with any questions or to get help.

Profile Name	Permission Set
LD_Customer_Success	LeanData Custom Objects Full Access
LD_API_ONLY	-
LD_Intern/TechSync	-
LD_Account_Manager	-
LD_ENT_SC	LeanData Custom Objects Full Access
LD_ADR_Mgmt	LeanData Custom Objects Full Access

Configuring LeanData Products

Once products are enabled in your environment, you can now configure them to fit your organization's needs. This should be done with the help of your Implementation Consultant or by referencing resources available on Zendesk and LearnUpon. These resources have many helpful videos and documents on how you can customize LeanData's products to your specifications. We recommend configuring and testing in a Sandbox before setting anything live in Production.

Resources

- **LeanData Help Center**
 - LeanData's knowledge base, which contains product guides and FAQ documents. The Help Center can be found at <https://leandatahelp.zendesk.com> and a Login and Password will need to be created when accessing for the first time.
- **LeanData University**
 - LeanData's video learning content which includes high level product walkthroughs as well as deep dives. LeanData University can be found at <https://leandata.learnupon.com> and a Login and Password will need to be created when accessing for the first time.

Copying Settings and Flows from One Org to Another

In some instances, in order to go live, you will simply want to copy settings and flows from one Salesforce organization to another. For example, this may apply when wanting to set products live in Production which were previously built and tested in the Sandbox. There are two things you'll be able to copy through LeanData:

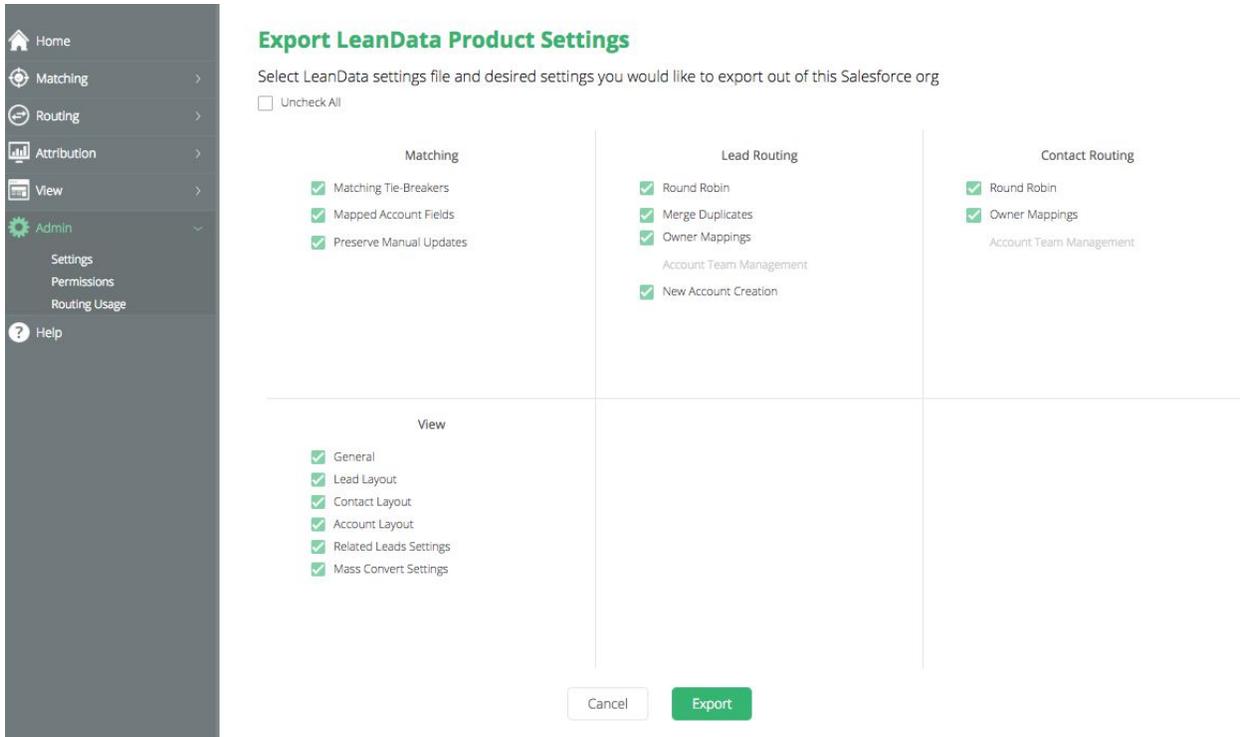
LeanData Settings

The Import/Export feature allows you to move certain parts of your LeanData setup from one Salesforce Organization to the new organization. A common example would be moving your Round Robin Groups from Sandbox to Production.

*Please note that in order to move items which reference specific fields or owners, you will only be able to do so if the destination organization has the same users and fields, as identified by User ID and API name.

To Export Settings:

1. Go to The LeanData Tab in the org with your desired settings.
2. Click on Admin.
3. Click on Settings.
4. Under Import/Export LeanData Settings, click on Export.
5. On the next screen, select the items you'd like to Export and click Export.
6. A file will be generated, save this in a location you can later access.



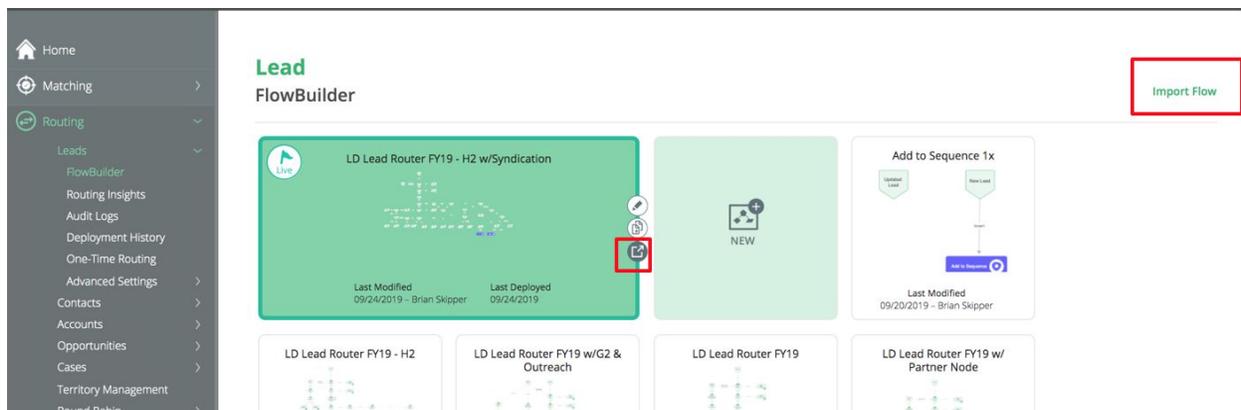
To Import Settings:

1. Go to The LeanData Tab in the destination org.
2. Click on Admin.
3. Click on Settings.
4. Under Import/Export LeanData Settings, click on Import.
5. Select the previously saved file.

LeanData Flow

In order to deploy in a new org, you will also need to move over your Routing flows. To do so:

1. Go to The LeanData Tab in the destination org.
2. Click on Routing, then select the object for the router you'd like to move (Leads, Accounts, etc).
3. Click on FlowBuilder.
4. Single-click on the flow you'd like to export and hit the Export icon to download the flow.
5. In the destination org, go to the desired FlowBuilder section and click on "Import Flow" in the top right of the screen. Upload the saved file to import your flow.

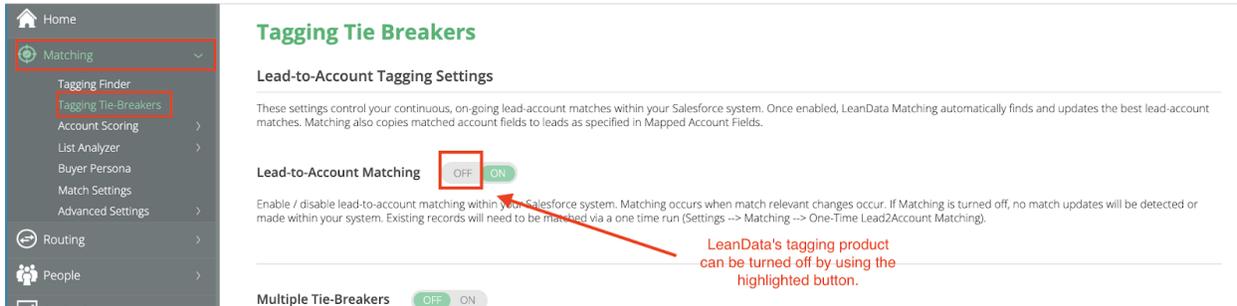


Going Live with LeanData Products

Once you have configured products to your liking, you will want to turn them on to start processing records. This includes several steps.

Deploying Tagging

Tagging defaults to "On" in LeanData, so as soon as you start the LeanData Scheduler in the next step, LeanData will start processing Leads for Tagging. To toggle this to "Off" you can go to the Matching section, then to Tagging Tie-Breakers and toggle the Lead to Account Matching to Off. If you are OK with tagging being enabled, there is nothing to change in this step and you simply need to turn on the LeanData Scheduler, per the next step. To tag all of the historic leads in your database, run a [One Time Tagging](#) job when you first deploy.



LeanData Scheduler

Turning on the LeanData Scheduler ensures that LeanData Matching and routing is “On” continuously. This starts the LeanData Scheduler job, which is responsible for firing off the ContinuousCleanBatch, an Apex Batch job that queries to find the inserts and updates waiting to be processed for Routing and Matching. Turning on the LeanData Scheduler ensures that LeanData Matching and Routing are “On” continuously and processing records.

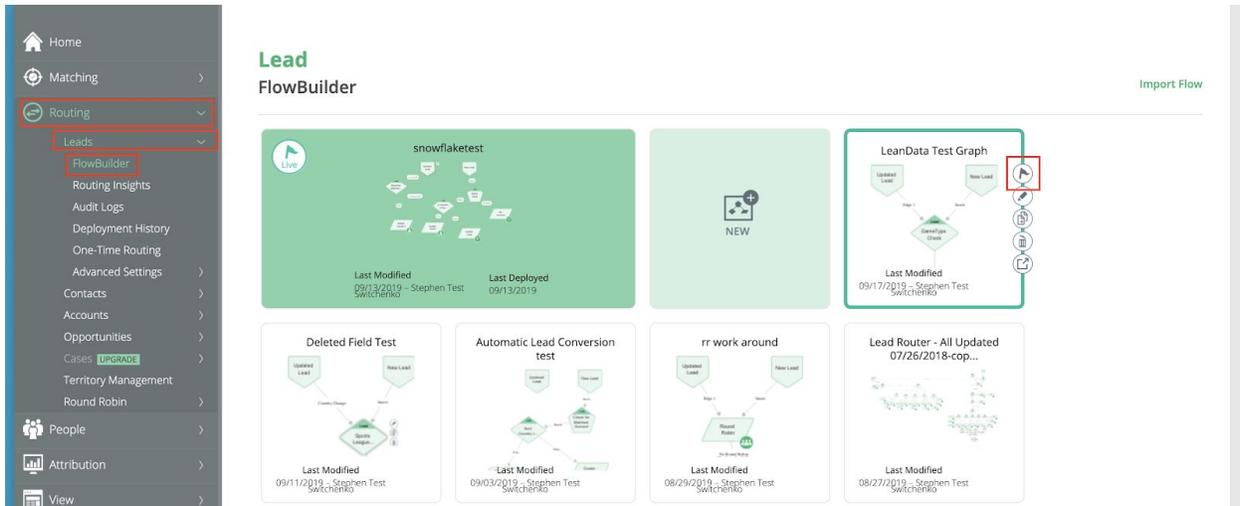
The Scheduler should be kicked off when you are ready to deploy LeanData in a new Salesforce instance. Prior to deploying the Scheduler, it's important to ensure that your LeanData settings and flows are all finalized and in place. The Scheduler should be deployed by the Integration User to ensure that all LeanData activity gets logged under that user.

To Start the LeanData Scheduler:

1. Go to The LeanData Tab in the destination org.
2. Click on Admin.
3. Click on Settings.
4. Under Restart LeanData Scheduler Job click on “Restart Scheduler.”
5. Once the Scheduler is kicked off, the LeanData Job Status should change to “Running” (sometimes the Status will start as “Running - Delayed” due to other processing happening in your system, then change to “Running” once that backlog is cleared).

Deploying Router

Setting a Routing flow Live is the final step in getting records routed through LeanData. To turn a flow live, click the flag button on the routing graph(s) that you would like to deploy. This can be found in the Flowbuilder section under Routing. After your graph is deployed successfully, you will receive a notification.



Now that you're live, you'll want to monitor that all is working as expected.

- Use the [Audit Logs](#) to check the routing path of the leads going through routing, to ensure that the logic you've built is executing as you expect.
- To view higher level routing results, use the [Routing Insights](#) to optimize your flow
- support@leandatainc.com is the email address to open up a ticket with the LeanData Support team. The LeanData Support team is available Monday - Friday from 5 am to 5 pm PT and can answer technical support questions or loop in other internal resources, as appropriate.