

# LeanData

Potential Effects of Configuration Changes



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## Overview

This guide is designed to provide you with information on how to manage changes in your LeanData configuration with regards to their level of potential impact in your Salesforce instance. Different LeanData configuration settings require different levels of sensitivity with regard to overall system impact. In general, we can break changes into 3 main categories:

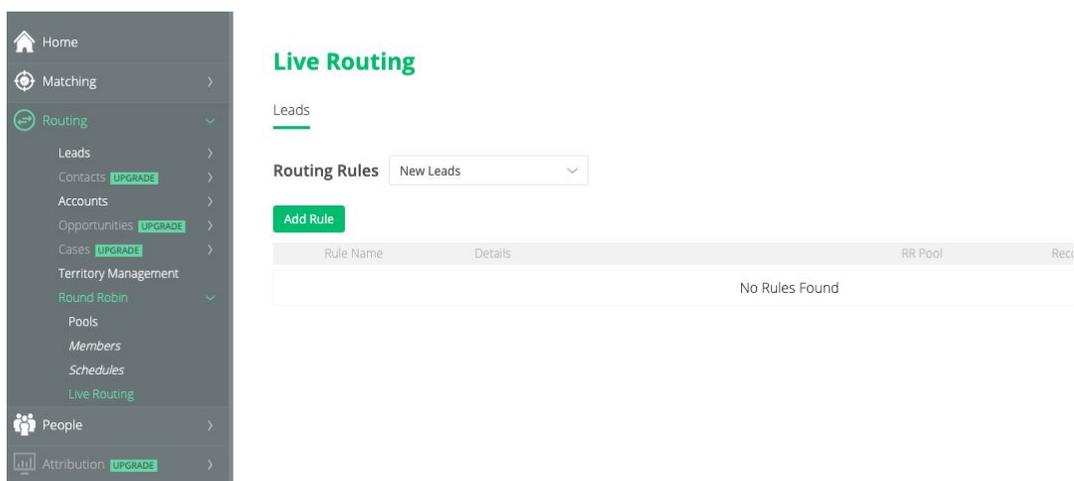
1. Changes that impact record evaluation in a trigger (most sensitive)
2. Changes that impact continuous routing flow but not trigger evaluation (sensitive)
3. One time jobs (more flexible)

**Please Note:** Due to factors outside of our control, there is no way to completely define the level of impact changes can have. This guide is designed to make you aware of potential issues and their impact.

## Changes that Impact Triggers

### Live Routing

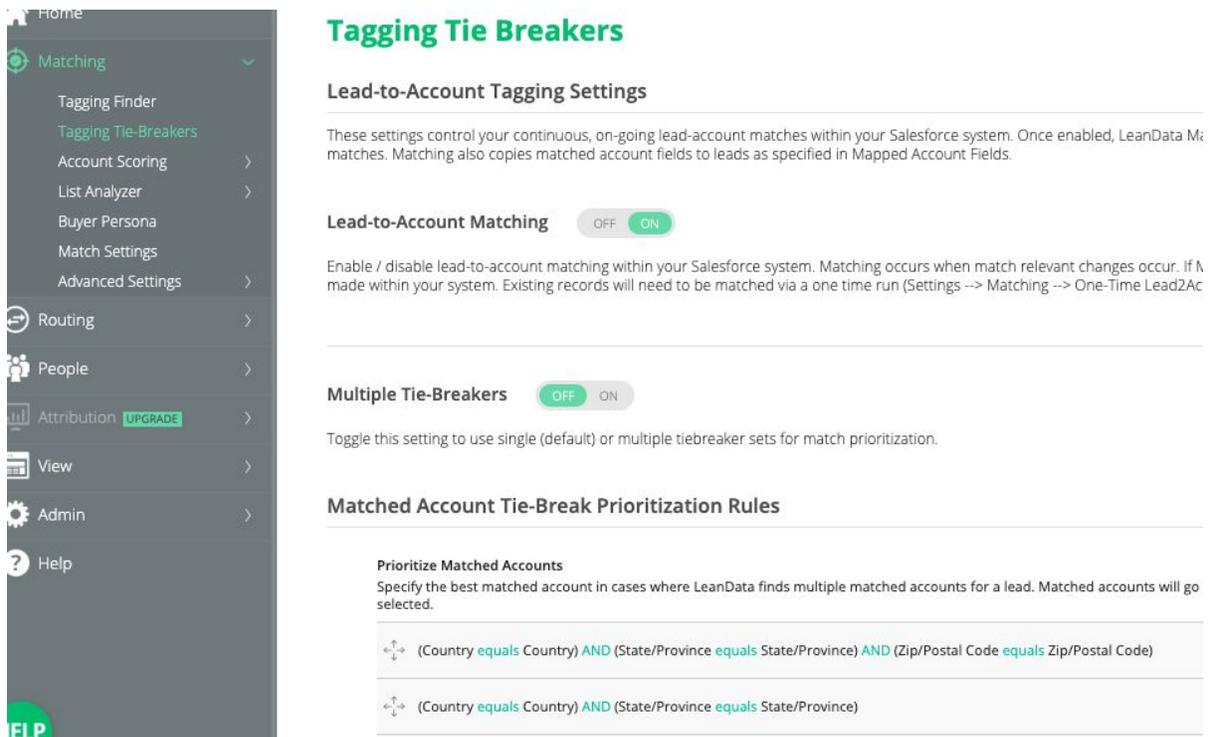
Configuring Live Routing conditions correctly is essential, because LeanData will only store audit information when leads meeting Live Routing conditions are processed. There will be no logs for records that did not process so troubleshooting may be difficult.



## Tagging Tie-Breakers

### Potential Sensitivity Level: Sensitive to flexible

Changes to fields used in tagging tiebreaking will trigger the creation of tagging CCIOs. If a field is added to tagging tiebreakers, this potentially means more CCIOs are produced. LeanData can provision a setting in a .bin file to exclude these fields from trigger, so that tagging CCIOs are not produced.



**Tagging Tie Breakers**

**Lead-to-Account Tagging Settings**

These settings control your continuous, on-going lead-account matches within your Salesforce system. Once enabled, LeanData M matches. Matching also copies matched account fields to leads as specified in Mapped Account Fields.

**Lead-to-Account Matching**  OFF  ON

Enable / disable lead-to-account matching within your Salesforce system. Matching occurs when match relevant changes occur. If made within your system. Existing records will need to be matched via a one time run (Settings --> Matching --> One-Time Lead2Ac

**Multiple Tie-Breakers**  OFF  ON

Toggle this setting to use single (default) or multiple tiebreaker sets for match prioritization.

**Matched Account Tie-Break Prioritization Rules**

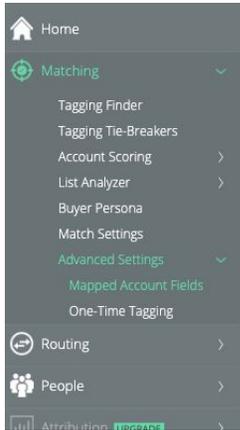
**Prioritize Matched Accounts**  
Specify the best matched account in cases where LeanData finds multiple matched accounts for a lead. Matched accounts will go selected.

- (Country equals Country) AND (State/Province equals State/Province) AND (Zip/Postal Code equals Zip/Postal Code)
- (Country equals Country) AND (State/Province equals State/Province)

## Mapped-Account Fields

### Potential Sensitivity Level: Flexible

Changes to mapped account fields affect the creation of UMLF (update mapped lead fields) CCIOs. UMLF CCIOs are produced whenever a relevant field is changed on an account, these CCIOs process faster than tagging CCIOs and are lower priority, since UMLF only involves copying fields from account to leads, without searching for a new match.



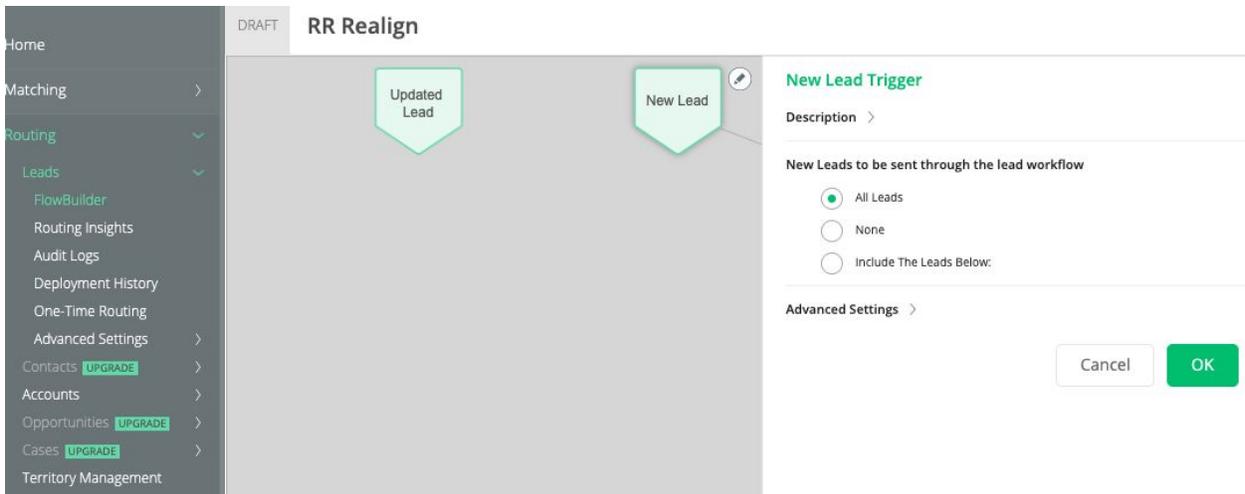
## Advanced Settings Mapped Account Fields

Account Field	Lead Field
<a href="#">+ Create New</a>	
<input type="button" value="Save"/>	

## Changes to Flow Routing Trigger Nodes

### Potential Sensitivity Level: Sensitive to Flexible

Trigger nodes are evaluated at trigger time (all other nodes are evaluated during ContinuousCleanBatch). Incorrect configuration of trigger nodes can lead to routing down time which can be difficult to diagnose. LeanData only creates logs for processed, routing CCIOs. If a lead (or contact, or account) does not meet the conditions at trigger time, no log will be produced (since to produce logs for inconsequential updates would be prohibitive).

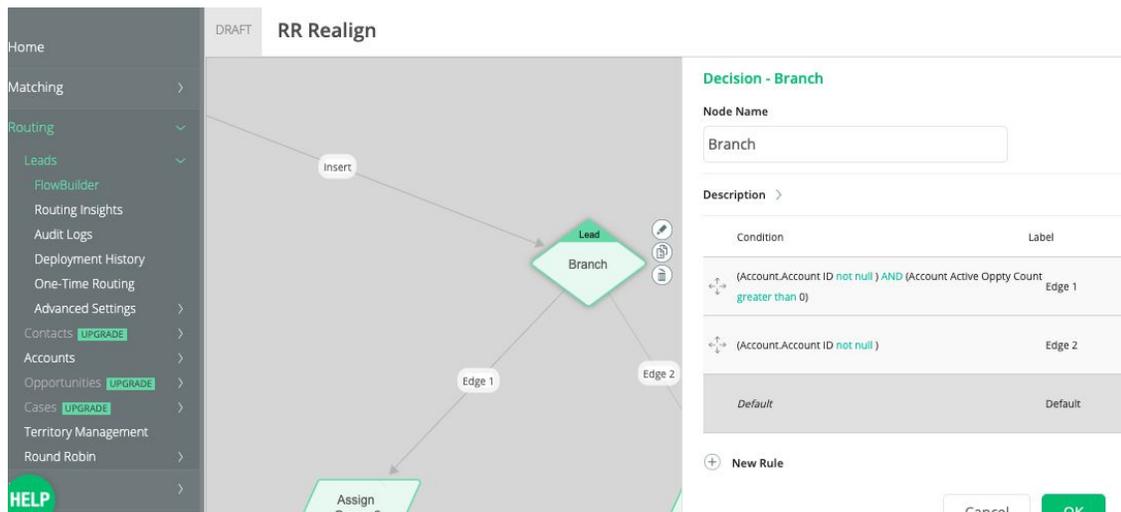


# Routing Changes that Do Not Impact Triggers

## Changes to non-Trigger Flow Nodes

### Potential Sensitivity Level: Sensitive to Flexible

These changes are easier to debug than changes to trigger nodes, as any lead that moves beyond the trigger nodes will produce audit logs. Audit logs include a summary of nodes traversed and include a link to the version of deployment the record was routed under.



The screenshot shows the LeanData interface for editing a routing rule. On the left is a navigation menu with options like Home, Matching, Routing, Leads, FlowBuilder, Routing Insights, Audit Logs, Deployment History, One-Time Routing, Advanced Settings, Contacts (UPGRADE), Accounts, Opportunities (UPGRADE), Cases (UPGRADE), Territory Management, and Round Robin. The main area displays a flow diagram with nodes: 'Insert', 'Lead Branch', 'Edge 1', 'Edge 2', and 'Assign'. The 'Lead Branch' node is highlighted, and a configuration panel is open on the right.

**Decision - Branch**

Node Name:

Description

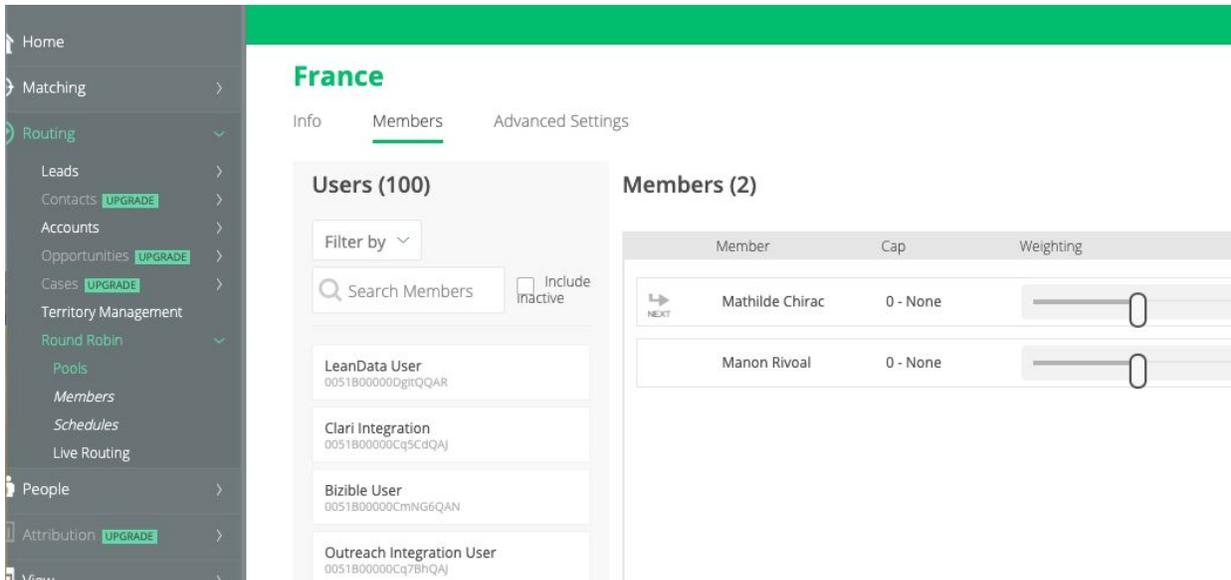
Condition	Label
(Account.Account ID not null ) AND (Account Active Oppy Count greater than 0)	Edge 1
(Account.Account ID not null )	Edge 2
Default	Default

Buttons: New Rule, Cancel, OK

## Changes to Round Robin Pool Composition

### Potential Sensitivity Level: Flexible

Changes to round robin pool composition are not tracked by LeanData (version control for these changes would be storage prohibitive) and therefore problems arising from pool changes can be difficult to debug. Most enterprise customers prefer to track changes made to round robin pools.



Other changes include:

- Changes to Round Robin Member Schedule
- Territory Management Rules Changes
- Merge Duplicates/Account Teams/Owner Mappings/Account Creation Rules

## Impact of One-Time Jobs

### One-Time Tagging Jobs

#### Potential Sensitivity Level: Volume driven - Sensitive to Flexible

One-Time Tagging (LeadAccountReporter batch in Apex Jobs) – the one time tagging batch runs on a SOQL condition and is relatively fast. Things to be considered are LeadAccountReporter taking a batch slot, and performing updates to LeanData\_\_Reporting\_Matched\_Account\_\_c lead field as well as any other mapped fields. Additionally, some outside integrations that depend on LastModifiedDate (e.g. Marketo) can be swamped by the mass updates.

## One-Time Routing (OneTimeRoutingBatch batch in Apex Jobs)

### Potential Sensitivity Level: Volume driven - Sensitive to Flexible

Operates on a CSV of Ids rather than a SOQL condition. Same risks as with the One-Time tagging batch, plus the fact that OwnerId and other flow fields might be updated.

## List Analyzer Jobs

### **Potential Sensitivity Level: Volume driven - Sensitive to Flexible**

Analyze Leads (AnalyzeListBatch batch in Apex Jobs) – List Analyzer is more benign than one-time routing or tagging, since no updates are performed. In this case, the main thing to be careful of is the batch slot consumed.

## Summary

This guide has provided LeanData features and settings that should be considered when making changes to LeanData and SFDC.