LeanData Router

Sales Engagement Integration FAQs

Overview

LeanData has launched Sales Engagement Integration nodes for Outreach and SalesLoft, allowing customers to add a Prospect to Sequences or Cadences directly from LeanData's FlowBuilder interface. In order to utilize these nodes, customers must set up the integration per the implementation guides (Outreach and SalesLoft). This document reflects frequently asked questions regarding these integrations and is not meant to be a substitute of the implementation guides.

FAQs

Is the integration included in my package?

These integrations are included in the Professional and Enterprise packages. If you're not certain which package you're on or you're interested in upgrading, please contact your CSM.

What do I need to do to get started?

1. Read over the implementation guides to gain a full understanding of the functionality and limitations of the integration
2. Set up the integration per the implementation guide directions
    a. Outreach
    b. SalesLoft

How long does set up of the integration take? Who is involved?

Set up of the integration will take about 30 minutes. The steps for both implementations require the Salesforce Admin and the Sales Engagement Tool Admin. The general steps are:

1. Authorize the Sales Engagement tool with LeanData (must be completed by the Salesforce Admin)
2. Set up the Salesforce sync with the tool (and create Salesforce fields if using Outreach)
3. Add the appropriate Action node(s) to your FlowBuilder graph and set up the edges exiting the node(s)

What happens if LeanData can't complete the action in my Sales Engagement tool?

If LeanData cannot complete an action in your Sales Engagement tool, there are a few paths we follow depending on the issue:

1. If the issue is expected and can be determined within Salesforce instantly, there are a few "edges" or outcomes you can configure within FlowBuilder. The Integration Action Node contains the following edges you can configure:
    a. Configuration Error: the authorization is invalid
    b. Queue Owner: the Lead is Queue-owned and the option selected for the Mailbox or Assignee is Lead Owner
    c. No User in Field: there is no User in the field designated for the Assignee or Mailbox
    d. Missing Prospect ID (Outreach specific): the Outreach ID is missing on the Lead or Contact
    e. Missing User ID (Outreach specific): the Outreach ID is missing on the User (the user selected in the mailbox section)
2. If the issue cannot be determined within Salesforce instantly and requires the API callout to complete, we retry the action 6 times.
    a. Examples include mailbox not found for the Outreach User or CRM ID not found on the SalesLoft record.
3. If the issue is critical and needs your attention, we revert all actions in the path and notify you
    a. An example is an invalid field was mapped in your Outreach > Salesforce field mappings in LeanData Partner App Settings.

Where do I go to see the actions that failed?

LeanData's Audit Logs will capture all successful and failed actions. At this time, Routing Insights will only show failures that LeanData encounters when creating the callout.

Who do I contact if the Salesforce Sync with the Sales Engagement tool fails?

- Outreach: platform@outreach.io
- SalesLoft: support@salesloft.com

How does this affect my API Limits?

For this integration, LeanData abides by the API limits of the Sales Engagement tool.

- Outreach: 5000 requests per user per hour
- SalesLoft: 600 requests per minute

The Salesforce sync with the Sales Engagement tool is limited by the Salesforce API Limit and is variable on each org.