

LeanData Routing

Time-Based Node:
Working Hours Enhancement



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Overview

LeanData offers an out-of-the-box time-based option to assist with SLAs and re-assignment, with the ability to reference the owner's working hours to ensure high-velocity outreach.

The newest enhancement for this node is the ability to apply working hours you may have previously set up to Time-Based nodes directly. This enhances performance by prioritizing record assignment when in working hours over those out of working hours. It also ensures routing occurs sooner for records in working hours.

This guide will overview this enhancement, walking you through the functionality, and how to utilize it in your Flow.

Access this feature by navigating to FlowBuilder > Time-Based Node. Adjust Schedules under the People > Settings section.

How it works

Definitions

- **Time-Based CCIO:** A CCIO created by the time-based node. LeanData generates a time-based CCIO anytime a record hits the node. With shorter time increments in the node, LeanData will likely generate more CCIOs if the record is rescheduled for evaluation. The CCIO is evaluated after the defined time frame has elapsed.
- **User Working Hours:** The hours the User is available to receive records. When creating the Working Hours, the admin must select a static timezone or the user's Salesforce timezone.
- **Time-Based Node Working Hours:** The Working Hours assigned to the node (and not the user itself). Any record that meets this node will be routed based on the user defined Working Hours.
 - Working Hours with "Use User Timezone" option checked will utilize the Integration User's Timezone. The Integration User changes to whoever restarts LeanData Scheduler. We recommend selecting a timezone for the Working Hours (People > Settings > Schedules).

- **User Holidays:** The holidays the User is unavailable to receive records.
- **Time-Based Holidays:** The holidays assigned to the node (and not the user itself). Any record that meets this node will be routed if the current time is not a Holiday.

Benefits

- This feature reduces the number of CCIOs processed at a certain time. Records that should not be routed due to out of office hours will not be processed.
- By reducing the number of CCIOs processed to only the CCIOs necessary for operations, LeanData prioritizes the routing of records during agent availability.
- When in working hours, users should receive more records at a faster rate than the previous build since LeanData will process fewer, more relevant records in a given time period.

Time-Based Route

Node Name
Time-Based Route

Description >

Time Frame
Set the time frame when the following rules will be evaluated (based on system performance, a delay of a few minutes may occur).

Evaluate after Defined Time Frame

Evaluate during Working Hours ?

Working Hours Schedule: LRB2 Working Hours

Holidays Schedule (optional): Search

Rules	Condition	Label	Target
	(ht int equals 0)	Edge 1	True/False
	Default	Default	Round & Robin&I

New Rule

Cancel OK

How to use it

1. Create a Time-Based node for each region which will be leverage this functionality
2. In each node, select the relevant Working Hours for that node.
 - a. Note: when a record enters the time-based node at a time in Working Hours, we will evaluate the conditions and route immediately. If the org requires a waiting period for SLAs, add another time-based node with the defined time frame following this node.

Use Cases

1. Limit CCIOs to only fire during Working Hours to reduce the volume and in turn, speed up the processing time
2. Prioritize incoming records for processing prior over records held during Off Hours to ensure Speed to Lead during Working Hours
3. Remove the necessity of adding Users to Working Hour Schedules
4. Cleaner Audit Logs/Reporting as records will not be continuously processed during Off Hours