

LeanData Customer Self-Implementation Guide

Advanced Routing





Overview	3
Learning Resources	3
Getting Started	3
LeanData Advanced Routing Implementation	3
Resources	4
Action Items - LeanData Advanced Routing	4
Moving LeanData Products into Production	5
Resources	5
FAQs	7
Best Practices	7



Overview

Thank you for purchasing LeanData's Advanced Routing products! We're excited that you have decided to incorporate LeanData Routing to help automate your assignments of Contacts, Accounts, Opportunities, and Cases.

The following document guides customers who may already be familiar with Lead Routing but are looking to also set up LeanData Routing for other objects. If you have not set up any LeanData products, please start with our [Customer Self-Implementation Guide - Lead Routing, Matching, and View Guide](#). You may return to this guide after the initial set up. For questions and assistance during the self-implementation process, please reach out to implementationhelp@leandata.com.

Learning Resources

- [LeanData Help Center](#) - Find product documentation including user guides, FAQs, release notes and more!
- [LeanData University](#) - LeanData's video learning content which includes high level product walkthroughs as well as deep dives. A Login and Password will need to be created when accessing for the first time.

Getting Started

Now that you're a LeanData customer, the first step will be a quick kick off call to get things started. On this call, you can expect to meet your Implementation Advisor, discuss the typical implementation flow, and get helpful information on resources available to you.

LeanData Advanced Routing Implementation

LeanData Advanced Routing allows you to automate your management of objects such as Contacts, Accounts, Opportunities, and Cases. From setting up triggering logic to defining when a record should be processed, to making decisions based on values within fields on the record itself or related records like a Matched Activity, to taking actions based on the outcomes of those decisions, routing these objects using LeanData Advanced Routing is highly configurable.

If you are familiar with the interface for LeanData Lead Routing, you will already be familiar with the FlowBuilder interface, which is also used to configure Routing for these other objects.

Because there are so many capabilities, we recommend starting simple and adding on from there. Routing normally requires thorough testing in a Sandbox environment, since the outcome of routing is often highly visible to your Salesforce users and can impact their workflow significantly. Ideally, you would run Sandbox tests with a full dataset, so a Full Sandbox is ideal. However, if that's not available you can also test within any Sandbox which has been recently refreshed from Production.

Resources

Please review the following resources to help with your LeanData Lead Routing deployment:

[LeanData University](#) (if accessing for the first time, you will have to create an account):

1. If you have not set up any LeanData Router before: Review the courses [03-LeanData Routing Fundamentals](#) and [04-Lead Router Nodes Deep Dive](#).
2. If you are already familiar with LeanData Lead Router, you can review this course: [05-Advanced Routing Topics](#).

[LeanData Help Center Guides](#):

1. [Routing - Contact Router Guide](#)
2. [Routing - Account Router Guide](#)
3. [Routing - Opportunity Router Guide](#)
4. [Routing - Case Router Guide](#)

Action Items - LeanData Advanced Routing

- ✓ Start by reviewing the Resources listed above to familiarize yourself with the Lead Router's capabilities.
- ✓ Map out your ideal distribution workflow and get internal buy-in from all relevant parties.
- ✓ Decide on the [New](#) and [Updated](#) entry points that would qualify a Lead to be routed upon creation and upon a relevant update.
- ✓ Once a record qualifies for routing, decide what logic needs to be checked on the record itself to determine its routing path.
- ✓ Determine what objects you'd like to match the record against, in order to determine the routing path. Depending on which object you are routing, LeanData can match to a Contact, Opportunity, or a Related Activity.
- ✓ If you need to reference fields on an Account already associated with the record, you will not need a match node but can access them directly via a lookup field.

- ✓ What actions do you want to automate in your routing flow? LeanData has a lot of capabilities here beyond simply assigning the record, so you will need to determine which best fit your business processes.
- ✓ Once you've built a rough version of your flow, it's time to deploy it for testing. If you haven't done so already, you should access the [LeanData Admin Guide](#) and follow the instructions under the "Restart LeanData Scheduler" to enable LeanData's ContinuousClean job. Next, navigate to the object you wish to route and then FlowBuilder, click on the flow you'd like to deploy and click on the Flag icon in order to set it Live.
- ✓ Thorough testing of your flow is an essential step before rolling it out to your Production environment.
 - *What is the ideal environment to test routing? It helps to test with a full dataset, so it's recommended to test in a Full Sandbox, however, if that's not available you can also test within any Sandbox which has been recently refreshed from Production.*
 - *We suggest two types of tests:*
 - *First, by creating records to meet the various conditions that you've built into your flow, to make sure that each condition is firing as expected.*
 - *Second, if you're testing in a sandbox with data, by running a [One-Time Routing job](#) to confirm that all functions as expected when a large number of records is run through. Ideally, you'd want to make sure that you hit each node in your flow at least once during testing.*
- ✓ Use the [Audit Logs](#) to check the routing path of the test records that you run, to ensure that the logic you've built is executing as you expect.
- ✓ To view higher level routing results, use the [Routing Insights & Deployment History](#) tools to optimize your flow.
- ✓ If you run into trouble with your Routing flow, or simply want an expert to look over it before you deploy, email implementationhelp@leandata.com to set up a phone appointment with an Implementation Advisor.

Moving LeanData Products into Production

Once you've finalized tests in your Sandbox, it's time to move your LeanData setup into Production. We recommend performing such a move when LeanData resources will be available to help you, should the need arise - the LeanData Support team is available Monday - Friday from 5 am to 5 pm PT, excluding holidays and can be reached by [submitting a ticket through the LeanData Help Center](#).

Resources

Please review the following resources to help with your Production deployment:

1. [Managed App Install Guide](#) document.
2. [LeanData Admin Guide](#) document.
3. [How do I Import and Export Settings](#) document.

Action Items - Deploying in Production

- ✓ You may have already downloaded the LeanData App in Production as well as configured API Access, Tab visibility and Permission sets. If not, please follow the directions for this outlined in the [Install Guide](#) and [Admin Guide](#) and email implementationhelp@leandata.com to confirm once the steps above are done. Once you do, your Implementation Advisor will be able to enable your LeanData products in your Production environment.
- ✓ Did your Advanced Routing setup in Sandbox cause you to create any new Fields, Users, etc? If so, make sure to mirror what you've created in Production.
- ✓ Transferring any relevant settings to your Production environment is easy if you use the Export/Import feature. Reference the [How do I Import and Export Settings](#) document on how to do so.
- ✓ Moving your Routing Flows is also simple by following the instructions under Import Your LeanData Flow within the [Admin Guide](#).
- ✓ When your Routing flows have been moved over to Production, you should verify that fields, values, IDs, etc that are used in these flows correspond correctly to Production. It's possible that some of these were different in Sandbox, and they need to be updated to Production fields, values, IDs before deploying.
- ✓ If LeanData routing is replacing another method of routing, such as workflows or Salesforce Assignment rules, you'll want to disable that routing prior to deploying LeanData routing so the two don't conflict.
- ✓ When you're ready to go Live with LeanData routing, you'll need to deploy your flow. To do so, single-click on the desired flow and hit the Flag icon to set it Live.
- ✓ You'll also need to ensure that LeanData's ContinuousClean job is Running, which means that records are continuously being evaluated to see if they meet your entry criteria for Routing. To turn this on, reference the [LeanData Admin Guide](#) and follow the instructions under the "Restart LeanData Scheduler". You're now live with LeanData!
- ✓ 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 records 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
- ✓ If you need technical support you can [submit a request to our Support team here](#). The LeanData Support team is available Monday - Friday from 5am to 5pm PT and can answer technical questions or loop in other internal resources, as appropriate.

FAQs

- Who should I involve internally to implement LeanData?
 - This of course depends on your organization and its policies. Typically the individuals involved in a LeanData implementation would be the SFDC Admin, Sales and/or Marketing Ops and sometimes representatives from Sales. Ideally, you should keep anyone looped in that has interest/approval on how records get assigned and make sure that you have internal buy in as you implement.
- How long does a typical LeanData implementation take?
 - A normal implementation has three phases - requirements gathering, building/testing, and deployment/monitoring. It's common for these steps to take around 3-4 weeks, however we have seen this move quicker for customers that are self-implementing the tool.
- Who can I reach out to if I have questions?
 - There are two resources you can reach out to:
 - [Implementation Advisor team](#) - Reach out during the implementation period with any questions around the implementation process, tools, best practices, or to verify your setup.
 - [LeanData's Support team](#) - Submit a ticket to our Support Team after the implementation period with any questions.
- I've tried doing this implementation myself, but need some professional help - what can I do?
 - Reach out to implementationhelp@leandata.com and let us know. Depending on the scope of the project you need done, we'll be able to provide a quote for the work or recommend a certified LeanData partner that is able to work with you.

Best Practices

- Many times as part of the implementation, customers want to run pre-existing through the Router for re-assignment via LeanData. If you're contemplating running a large number of Leads through [One-Time Routing](#), it's important to thoroughly test your configuration first to ensure that it's functioning as expected. Start by running smaller One-Time Routing batches to make sure that things are still working as expected, then move on to running larger batches once you've verified the small ones. Finally, it's a good idea to backup your data before running any One-Time Routing jobs.
- It's good to start with a relatively simple Routing configuration and then add on functionality from there. The Implementation Advisor team would be happy to provide guidance as needed!

- We recommend having at least 2-3 people in your organization that are up to speed on LeanData, so it's a great idea to loop in others as you're going through the training and implementation as well as to keep detailed notes of your implementation decisions that someone can reference if you're not available.
- Do you feel like a LeanData wizard after completing this implementation? Take the LeanData Certification course and become a Certified expert! Check upcoming dates or sign up for a Self-Paced course [here](#).