LeanData Routing

Deployment History & Routing Insights

Overview 3

Definitions 3

Accessing Deployment History 3

Live Deployments Page 4

Deployment View Page 5

- Successes 7
- Failures 8
- Exporting Routing Insights 9
- Ownership Distribution 10
- Territory Distribution 10

FAQs 11

Overview

Deployment History and Routing Insights are tools to better understand how records are routed through current Router Flows, One-Time Routing jobs, and previous Router deployments. These tools can be used for troubleshooting records, understanding errors, and visually understanding the distribution of records.

Please Note: We focus on Lead Router in this guide, but Deployment History and Routing Insights are also available for Contact, Account, Opportunity, and Case Router.

Definitions

- **Deployment History**
  - Chronological list of Router Deployments which shows metrics and distribution of records.

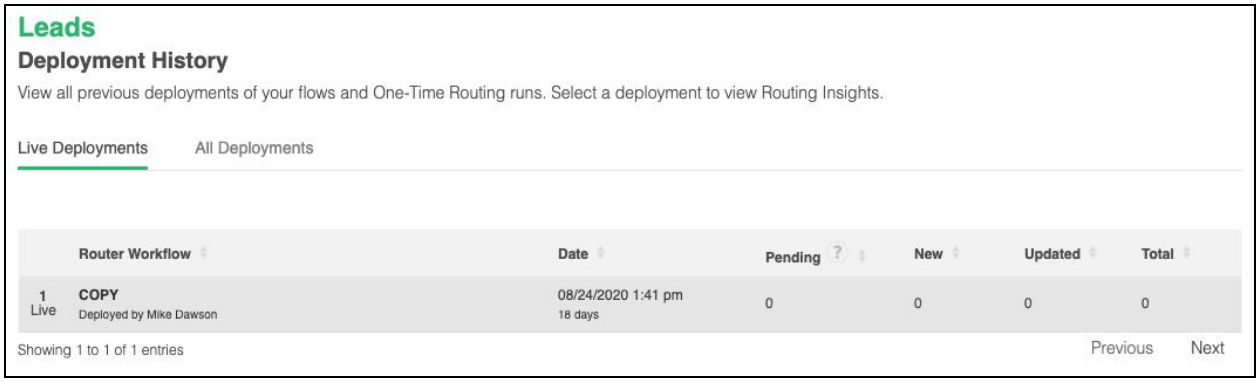
- **Routing Insights**
  - View the current Live Router Graph with metrics and distribution of records.

Accessing Deployment History

To access the Deployment History & Routing Insights section, navigate from your LeanData Dashboard to Routing → Leads → Deployment History & Routing Insights.

When the Deployment & Routing Insights page loads you will see the Live Deployments Tab displayed, with your currently deployed graph. Clicking on the All Deployments Tab will display a table with all of your graphs. Routing Insights are accessed by clicking on a Router workflow.

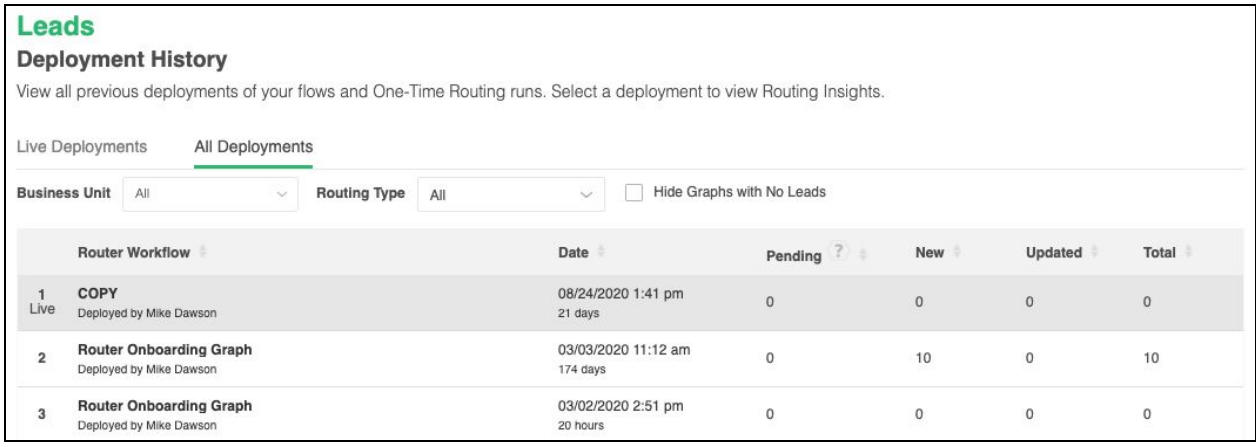
Live Deployments Page



The Deployment table displays the following information:

- **Router Workflow** - The Name and user that deployed the Workflow.
- **Date** - Date the Workflow was deployed.
- **Pending** - Number of records pending routing.
- **New** - Number of records that were processed by the New Entry Node.
- **Updated** - Number of records that were processed by the Updated Lead Entry Node.
- **Total** - Total number of records processed by the flow to date.

To view all deployments, current and historical, click on the All Deployments tab.



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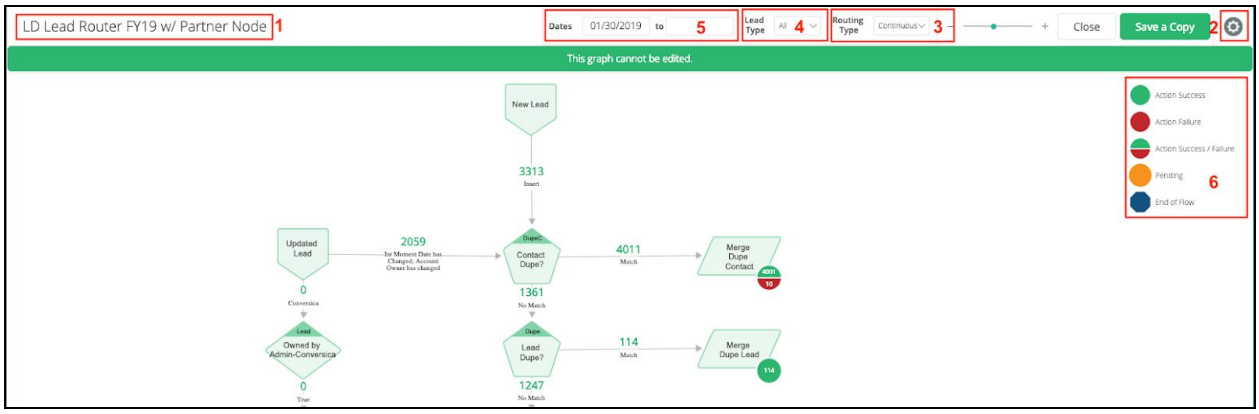
You can do the following on this page:

1. You can filter the deployments by Business Units, if you use Multi-graph routing.
2. You can filter the deployment by the type of routing jobs that they were used for. This would mean either a previously deployed graph or a graph that was used for a One-Time Routing job.
3. You can hide all options that never processed any records by clicking the “Hide Graphs with No Leads” button.
4. This row shows the title for each data column and it shows all deployments, starting with the most chronologically recent, but each column’s order can be changed by clicking the arrows next to the respective column titles.
5. You can change pages to see more historical routing deployments.

Deployment View Page

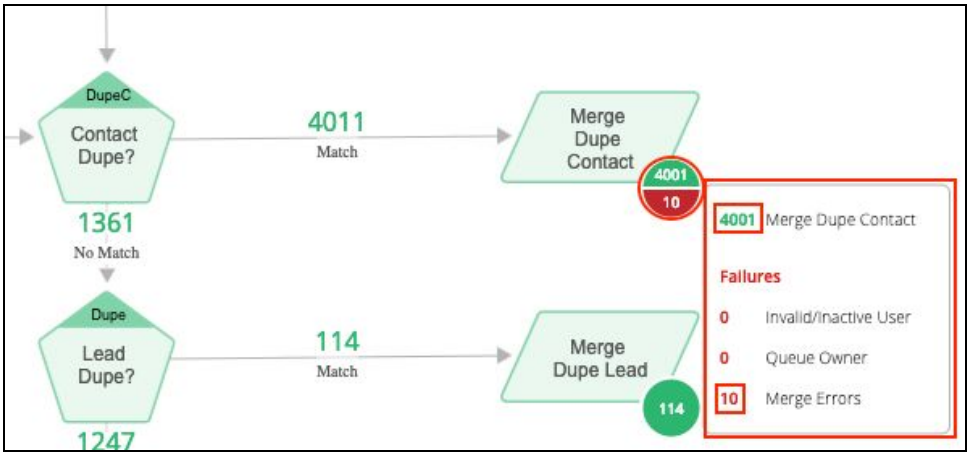
Clicking into one of the line items will display a non-editable FlowBuilder graph for Routing Insights, with the metrics displayed throughout the time of deployment. From here, you are able to see:

- The graph as it existed in the past deployment.
- The historical Routing Insights:
    - You can see a Legend for “Action Success,” “Action Failure,” “Action Success/Failure,” and “End of Flow”
    - You can see how many records went through each node
- You can also see which records were successfully routed and which failed.



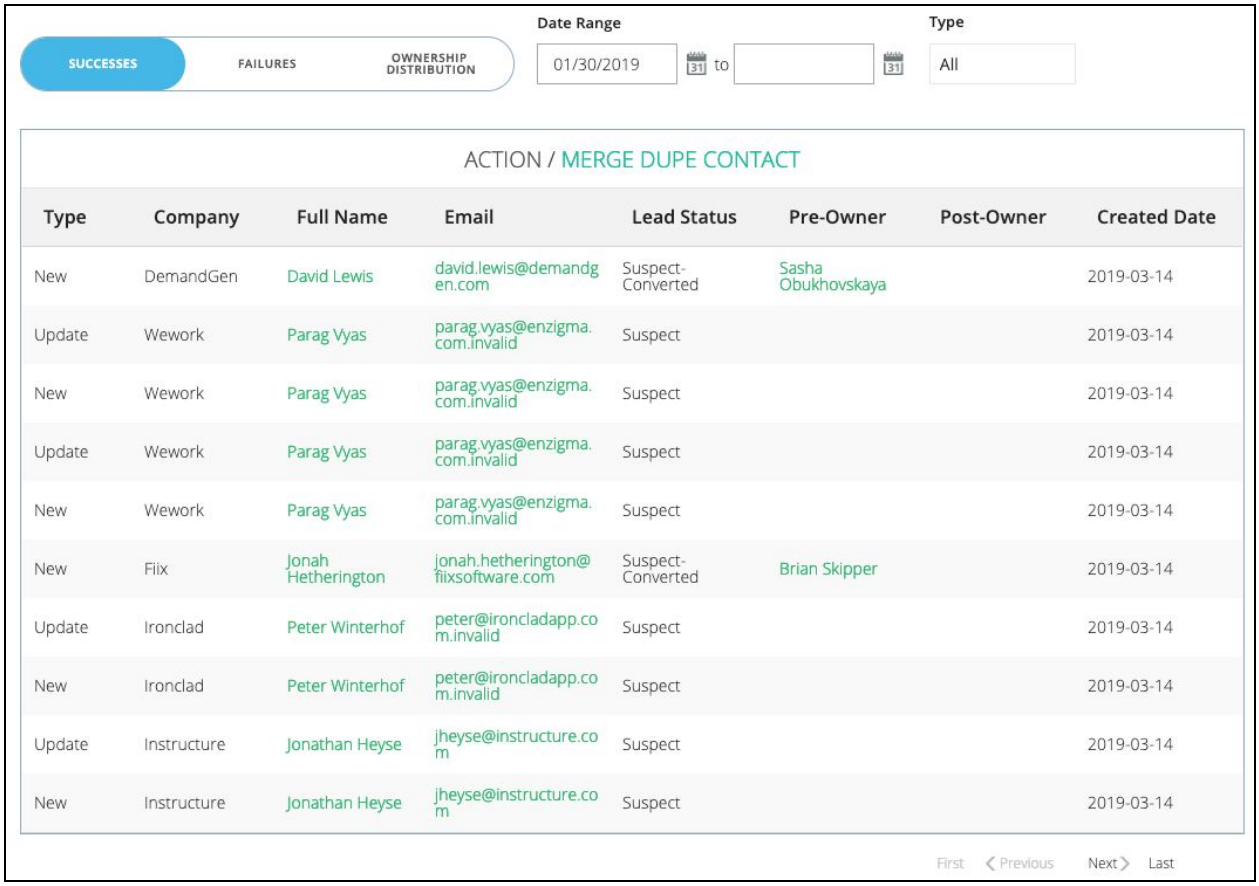
Features of the Routing Insights Router Graph Page:

1. The title of the FlowBuilder graph that you are inspecting will automatically populate in the top left corner after clicking into a graph option.
2. The cog wheel icon allows you to enable or disable grid lines behind the graph.
3. The graph's routing type will be designated at the top. If the graph is continuous then we know it was previously used as a deployed graph for the entire instance. If highlighted as "One-Time", then the graph was used to carry out a "One-Time Routing Job" and was not used as a previous, instance-wide, deployment.
4. The "Lead Type" dropdown allows you to filter routing insights by the entry point the records took to be processed by the graph. You can filter by either "New Leads", "Updated Leads" or the "All" option which shows both. Other router objects will be named accordingly.
5. The date range box allows you to show results according to date and time windows during the period the graph you are inspecting was deployed. You can adjust this by simply choosing the dates.
6. The legend shows the different types of routing insights bubbles you will see. Please note that the numbers shown within these bubbles are clickable features that will show you more details about the leads that were processed through each respective node.



If you click on any of the numbers within the legend, you'll be redirected to this page (as seen in the screenshot below), you'll be able to see Successes, Failures, and Ownership Distribution for that particular node.

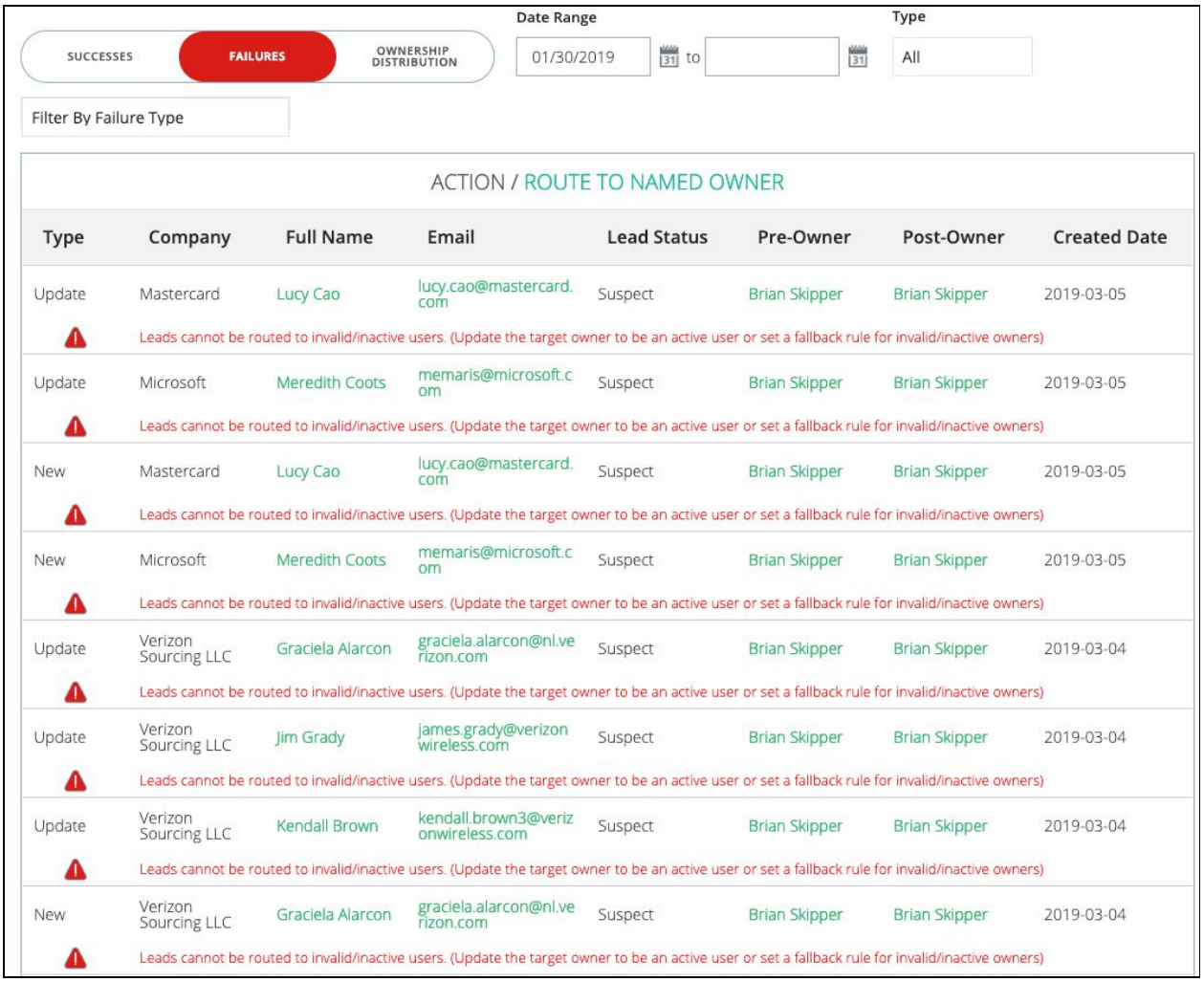
Successes



Successes Details:

- Type
- Company
- Full name
- Email
- Lead Status
- Pre-owner (the owner of the Lead before it was updated)
- Post-owner (the current owner of the lead when it was processed)
- Created date (when the lead was originally created)

Failures



Failure Details:

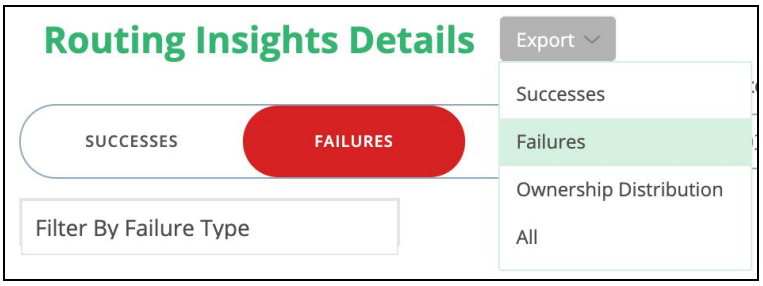
- Type
- Company
- Full name

- Email
- Lead Status
- Pre-owner
- Post-owner (due to a lead failing to route, this will be the same as the Pre-owner)
- Created Date
- The error message/reason for why the lead failed to process.

Exporting Routing Insights

On the Routing Insights Detail Page you can export the insight details. At the top of the page is an Export button. When you click the Export button a menu will be displayed. From the Export Menu, you can choose Successes, Failures, Ownership Distribution, and All entries. When you make your selection, LeanData will export the requested results in CSV file (Comma Separated Value). If you select All, LeanData will export multiple CSV files, one for each type of result.

The exported results can help analyze your Flowbuilder outcomes. For example: If you have a large number of failures due to something like Salesforce Validation Errors, you can fix the Router Flow to correct the errors, export the failed Leads into a CSV and re-route the affected leads using One-Time Routing.



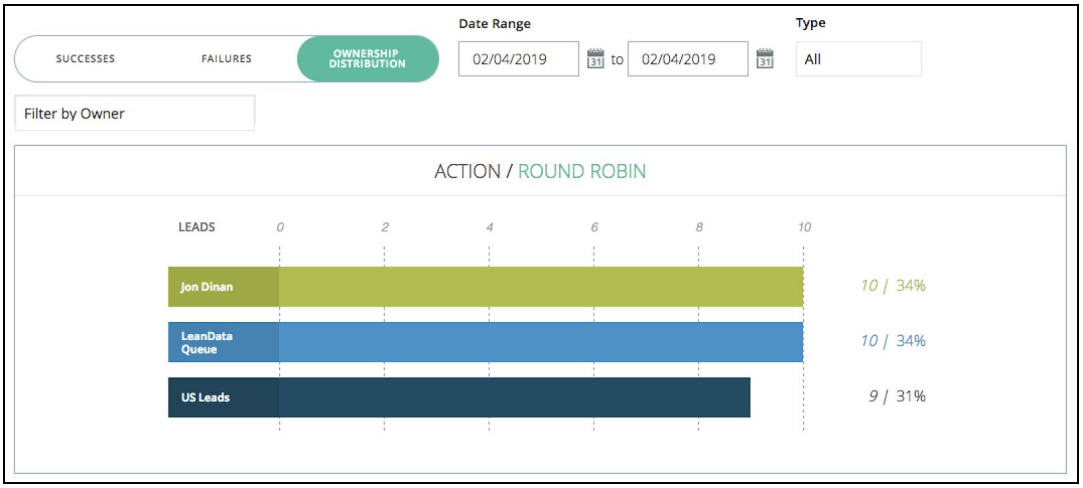
The export file will include the following information:

- Lead ID
- Trigger Type
- First and Last Name
- Company
- Email
- Lead Status
- Created Date
- Website
- City
- State
- Postal Code
- Country

- Pre-Owner (Owner before routing)
- Post-Owner (Owner after Routing)
- Processed At (Date/Time of Routing)

Ownership Distribution

Ownership Distribution shows the records assigned to Users within a visual bar graph. Distribution occurs where assignment or reassignment may occur. The distribution graphs are most common in Round Robin Pools, but are also present in other assignment nodes such as Assign to Matched Lead Owner.



Territory Distribution

Territory Distribution shows the records which were distributed amongst a region which was set up within Territory Management. Using this distribution can show the amount of records which were dispersed to the different territories. Note that the territory name used within the CSV upload will be the name shown on the individual line items of the bar graph. These names can be changed within the Territory Management tool.

When is Deployment History used/useful?

- You can “Save a Copy” of an old graph and deploy that in case you wanted to revert changes.
- You can see Routing Insights from old deployments and one-time jobs to see how your Leads, Contacts, and Accounts were routed through your Flow.

Summary

Using the Deployment History and Routing Insights to view the flow of your Leads and identify gaps and inefficiencies to improve your Router Flows. These powerful tools will aid you in your ongoing use of LeanData.

Questions? [Please submit a ticket to LeanData Support]