LeanData

Round Robin Distribution Data Visualization

Overview

LeanData provides an out-of-the-box dashboard for measuring Round Robin distribution across graph deployments. This guide will overview this visualization, walking you through the data collected and how each component may be used to monitor Round Robin distribution.

To access Round Robin distribution data:
1. In the LeanData app, click on Routing, to expand the section.
2. Click on Round Robin, to expand the section.
3. Click on Pools.
4. To view the pool distribution data, click on the metric icon in the Metrics column.
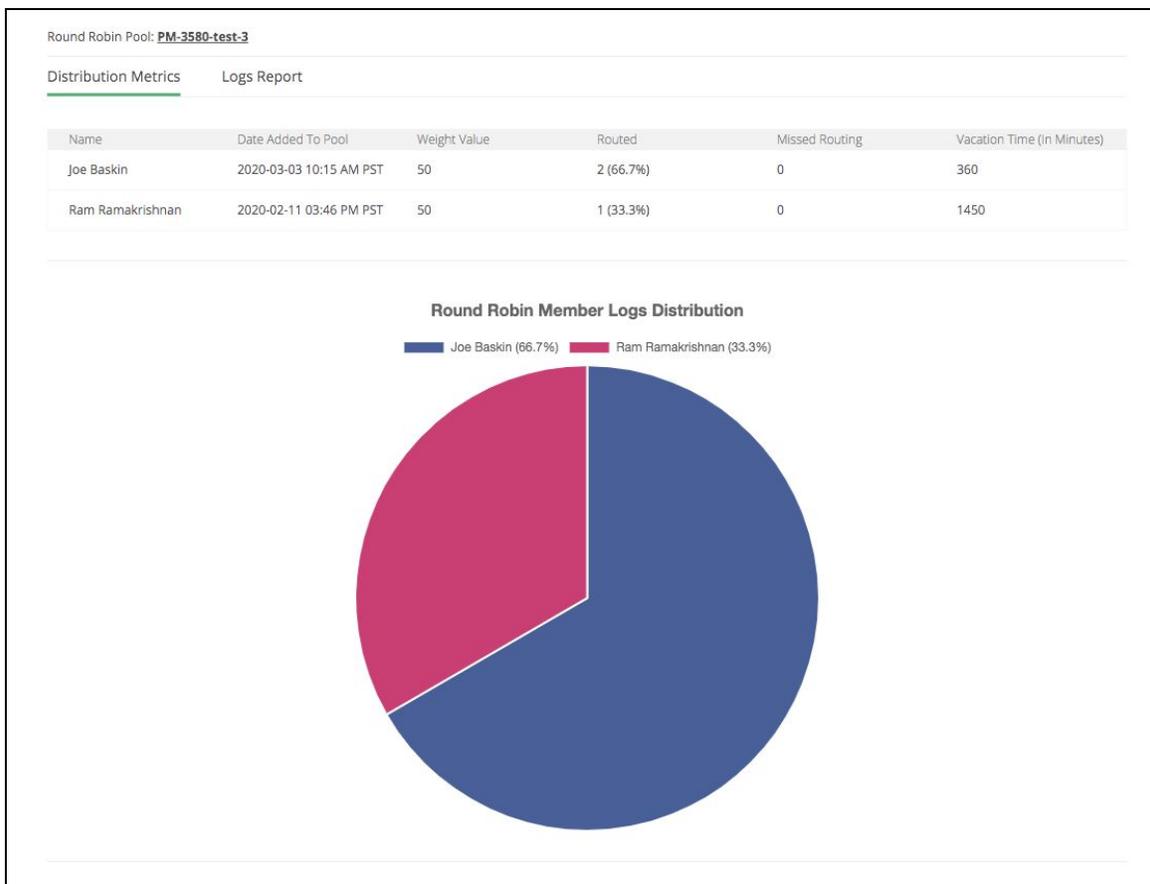
Round Robin Distribution Data Visualization

Definitions

- **Log:** A log is generated anytime LeanData picks up a record for evaluation, meaning there can be multiple Logs for one record.
  - **Missed Logs** are the number of logs LeanData attempted to route to the user and was unable to due to user unavailability
  - An example of one Lead creating three separate Logs:
    1. LeanData picks up a new Lead when it enters Salesforce for the first time
    2. LeanData picks up the Lead again when it meets the Updated Trigger Conditions - when the Lead status changes
    3. LeanData picks up the Lead when the time frame designated in a Time-Based Node is met
- **Schedules:** LeanData offers out-of-the-box User Schedule Configuration. Schedules comprise of the following:
  - **Working Hours:** The hours the User is available to receive records.
  - **Holidays:** The holidays the User is unavailable to receive records.
  - **Vacations:** The time off when the user is unavailable to receive records.
  - **Pausing:** The undefined periods of time the User is unavailable to receive records, such as lunch breaks or last-minute non-work related obligations.
- **Capping:** LeanData offers the ability to limit the records a User receives in two methods:
  - **Conditional Capping:** Rules control how many records meeting defined conditions a Pool Member can own. Once the Pool Member reaches the capacity, he/she is unavailable to receive more records.
  - **Time-Based Capping:** Settings control the number of records a Pool Member can receive over a defined period of time. Once the Pool Member reaches the capacity in the time period, he/she is unavailable to receive more records.

Distribution Metrics

The four Dynamic Charts displayed in the Distribution Metrics are adjustable based on user needs.

- Chart displays: Click on the user and label names to remove them from the chart displayed. Click again to include them in the chart.
- Metrics displays: Adjust the date filters at the top-right corner of the page to include/exclude logs in a specified date range.

Round Robin Pool: **PM-3580-test-3**

Distribution Metrics   Logs Report

Name	Date Added To Pool	Weight Value	Routed	Missed Routing	Vacation Time (In Minutes)
Joe Baskin	2020-03-03 10:15 AM PST	50	2 (66.7%)	0	360
Ram Ramakrishnan	2020-02-11 03:46 PM PST	50	1 (33.3%)	0	1450

Round Robin Member Logs Distribution

Joe Baskin (66.7%)   Ram Ramakrishnan (33.3%)

Distribution Metrics display the data for each Pool and assist Admins' analysis into record distribution and member availability. Pool members will only appear in the table if LeanData routed records to this Pool and to them specifically.

The summary table outlines members of the pool and relevant data that impacts distribution:
- **Name:** User name.
- **Date added to Pool**: The most recent date the member was added to the pool
- **Weight Value**: Expected Percentage of Logs (pointer value)
    - LeanData retimmembers receive more.
- **Routed**: Number of Logs routed and the percentage of total Logs routed to the Pool member.
- **Missed Logs**: Number of Logs LeanData attempted to assign to this Pool Member and was unable to due to the Member availability.
- **Vacation Time**: Number of minutes the Pool Member spent on Vacation.
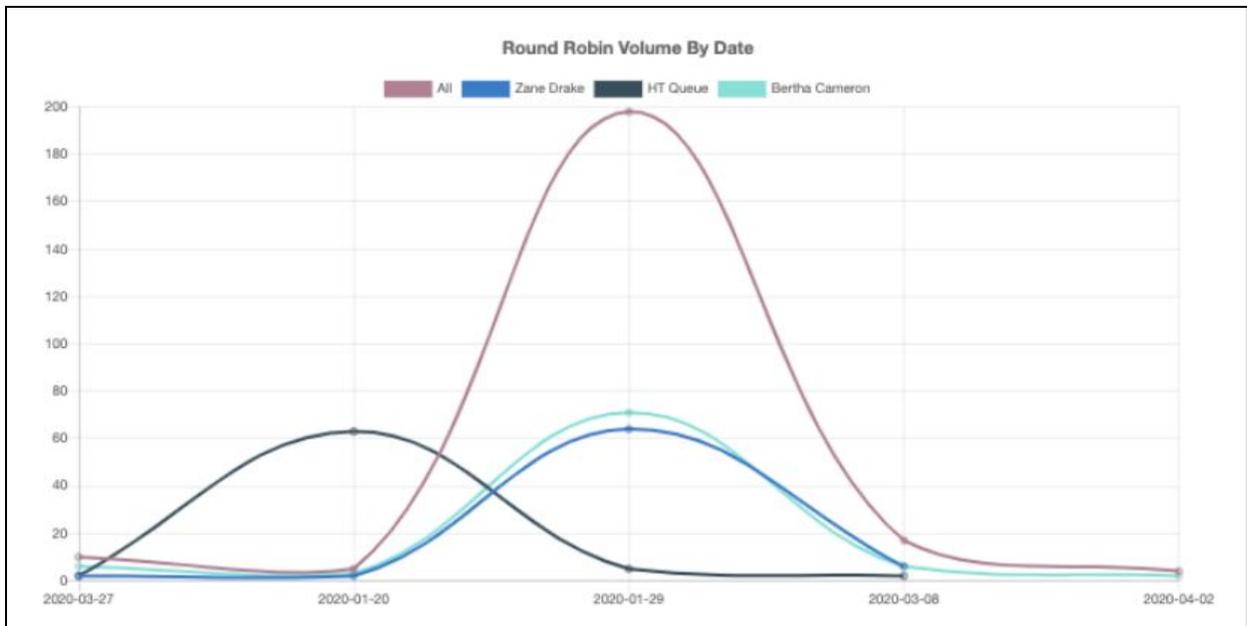
This chart displays the number of logs routed day over day. By default, LeanData retains Logs for 90 days. To adjust the dates shown on the chart, apply date filters on the top right of the page.

To extend the Log retention period, please contact LeanData Support.

Missed Routing Logs Count VS. Vacation Time
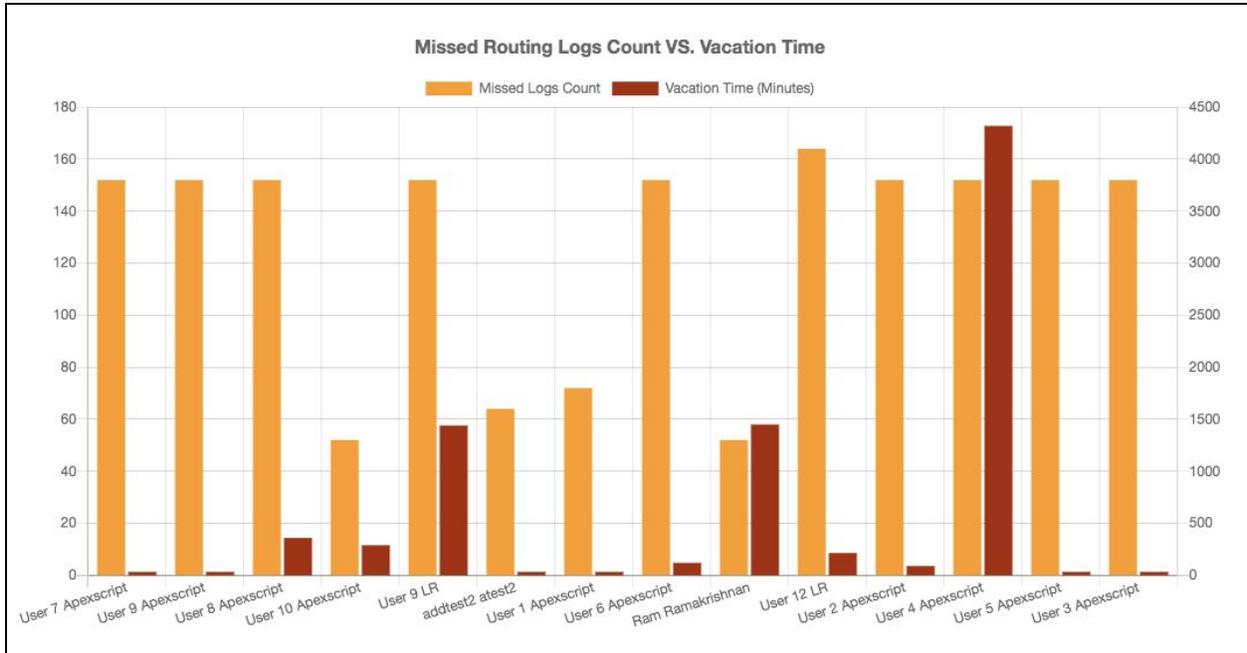
This chart displays the number of missed logs in comparison with the vacation time in minutes.

As expected, the more minutes a Pool Member spends on Vacation, the more likely they are unavailable to receive records. This assumption is, however, impacted by the volume of records coming during time off/time on.

- For example:
  - If User 1 is on Vacation on Monday for 8 hours when Marketing created 20 new Leads and User 2 is on Vacation on Thursday and Friday for 16 hours when Marketing only created 10 new Leads total
  - Then, User 1 may have received more Leads than User 2, despite the difference in Vacation minutes.

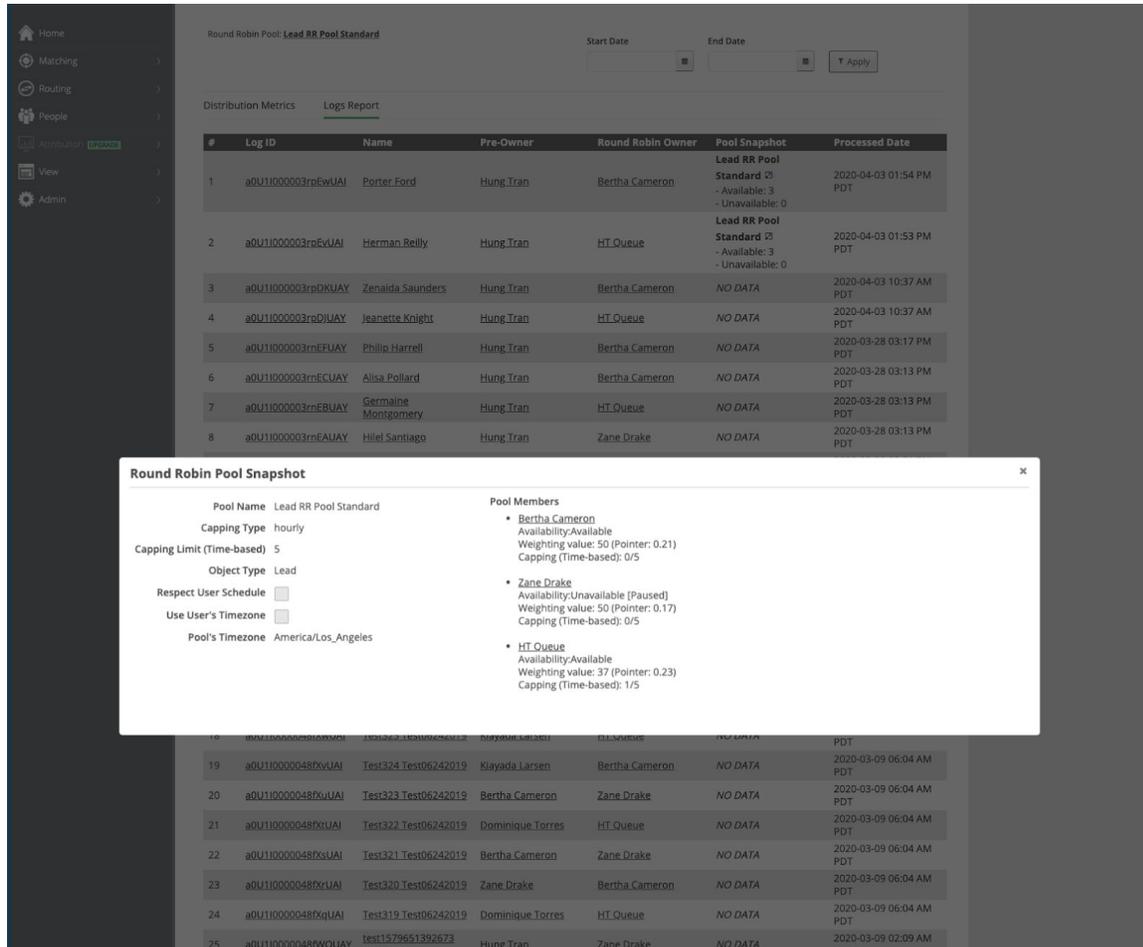**Members' Missed Logs Count by Unavailability Reason**
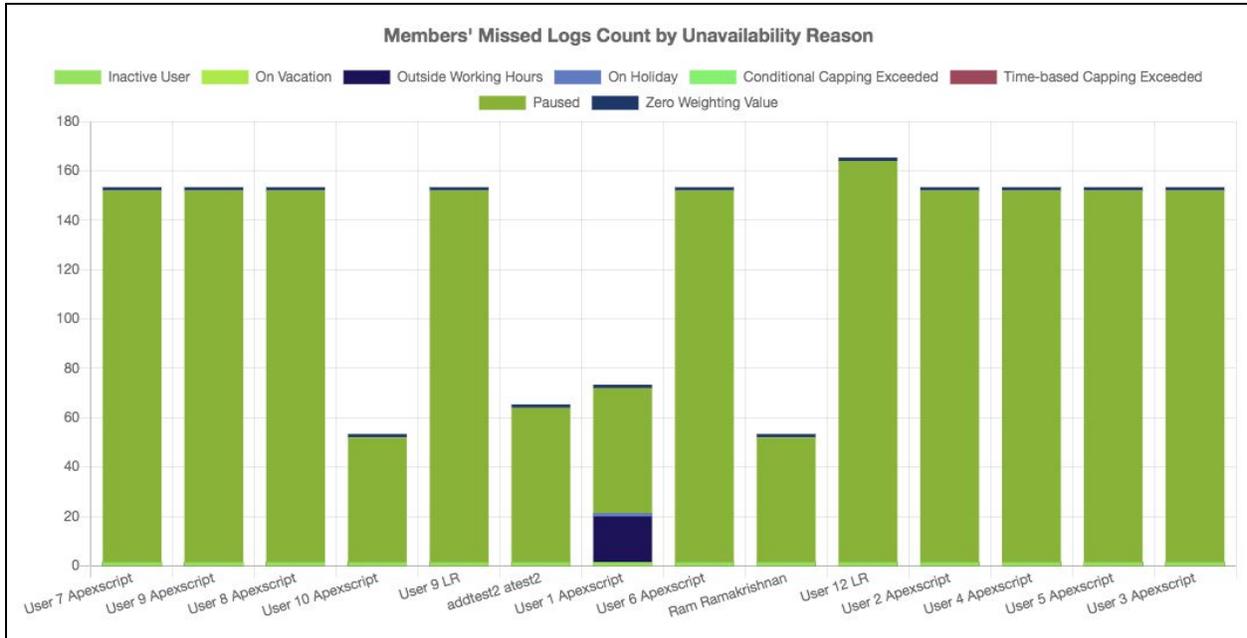
This chart displays the number of missed logs spliced by the reason LeanData was unable to assign the record to them at the time of routing.

As defined above, LeanData offers various forms of configuration for Round Robin Pools that can directly impact Distribution. Below are additional definitions:

- **Zero Weighting Value:** The User was set at 0 Weighting Value in the Pool and unable to receive Leads.
- **Inactive User**: The User was inactive and unable to receive Leads.

Logs Report

The Logs Report includes assignment details of each Log for reliable troubleshooting and diagnosis.

Each column provides detailed information about the Log:
- **Log ID:** The Audit Log Link for the route. Click into this link to see the path the record took to reach this Round Robin Pool.
- **Name:** Name on the record routed. Click into this link to view the record in Salesforce.
- **Pre-Owner:** The User assigned the record prior to this log's assignment.
- **Round Robin Owner:** The User who received the record in this Round Robin Pool.
  - Note: Another assignment node may follow this Round Robin Pool and the record could be ultimately assigned to another User.
- **Pool Snapshot:** The Pool's State at the time of Routing, including Pool-Level Settings and the Pool Members' Availability Status.
- **Processed Date:** The Date/Time LeanData processed the Log in the Browser Timezone.

Additional Considerations

- Adjusting the weighting of any Pool Member or adding / removing Pool Members automatically resets the Pool distribution.
    - Distribution history is not incorporated - for example, if User 2 received the last Lead and User 3 is next up, the weighting adjustment resets distribution entirely and begins at User 1.
    - LeanData starts at the top of the Pool, distributes to the first Member, and continues distribution to the list of Users in the defined order.
    - The pointer value for every user is reset to 0.
- If a User in the Pool already owns the incoming record, LeanData will re-assign it to another User in the Pool *unless* the new Edge in the Round Robin Node "Record already assigned to active member in Pool" is enabled.
- If LeanData attempts to route a record and the user is unavailable due to multiple reasons, the metrics prioritize the reasons in the order below. For example - if a user is inactive and also on Vacation, the reason captured for the inability to assign to the user will be: "Inactive User"
    1. Inactive User
    2. Zero Weighting Value
    3. User On Holiday
    4. User On Vacation
    5. User Outside Working Hours
    6. User Paused Round Robin
    7. User Time Capping Exceeded
    8. User Capping Exceeded

Summary

This guide has provided an overview on moving from the current single router graph to supporting multiple graphs with Business units. Multi-graph Routing gives you the ability to deploy one graph per Business Unit for every LD Supported object.