

LeanData Routing

How to Set Up User Schedules



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Overview

Schedules can be used in LeanData to indicate a User's availability to receive records as a member of a Round Robin Pool, ensuring that Users will only receive records when they are available to work on them.

Roles

LeanData Admin - A LeanData Admin is a User who has the LeanData Custom Objects Full Access Permission Set. A LeanData Admin will be able to access and configure all purchased components of LeanData including creating new round robin pools, accessing and editing all existing round robin pools, creating and editing all User schedules, and assigning Pool Managers.

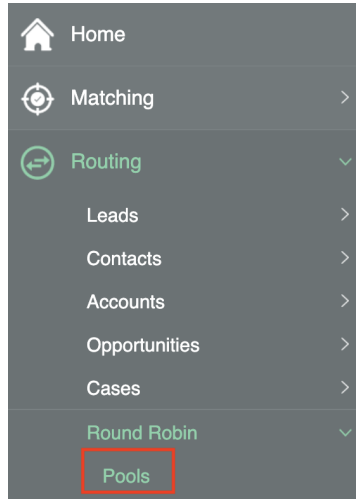
Pool Manager - A Pool Manager is a User that can edit the pools where they are listed as Pool Manager, and configure Schedules for the Users in their pools. Unless a Pool Manager is also a LeanData Admin, they will be unable to configure other aspects of LeanData. A LeanData Admin can designate Pool Manager(s) for a round robin pool. A Pool Manager does not necessarily have to be a member of the pool itself.

Pool Member - A Pool Member is simply a User who has been added to a round robin pool. Unless a Pool Member is also a LeanData Admin or a Pool Manager, they will only be able to configure their own Vacation Settings.

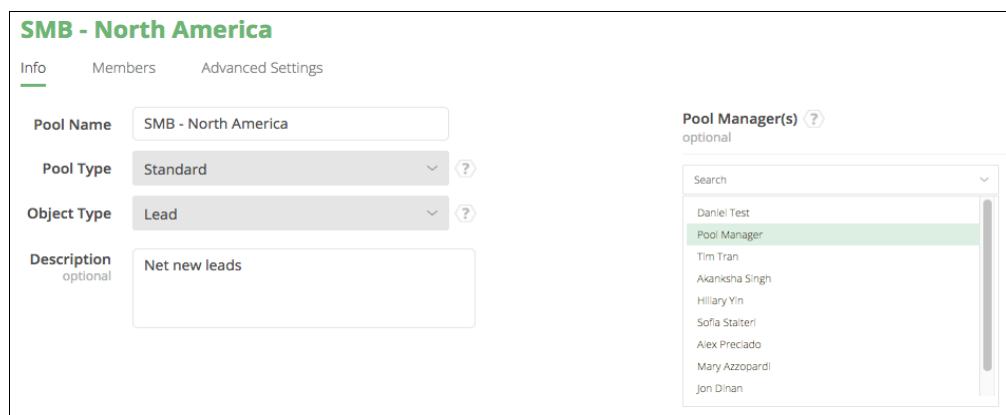
Designating Pool Managers

To designate a User as a Pool Manager, you will need to have the LeanData Custom Objects Full Access Permission Set.

1. Navigate to **Routing** → **Round Robin** → **Pools** and select the Pool for which you would like to designate a Pool Manager.



2. Once you have selected a Pool, on the right side of the Pool page, use the dropdown in the Pool Manager(s) section to select the User(s) you would like to designate as the Pool Manager for this pool.

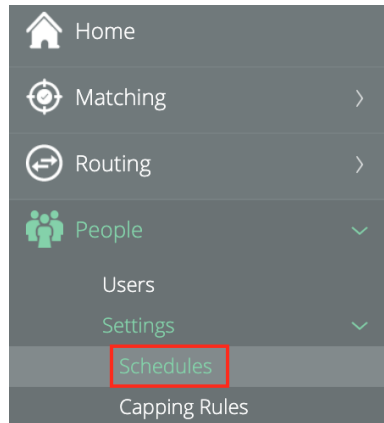


3. Once you hit the **Save Pool** button in the upper right corner of the page, your selected User(s) will be Pool Manager(s) for this pool. You do not have to assign any additional Permission Sets.

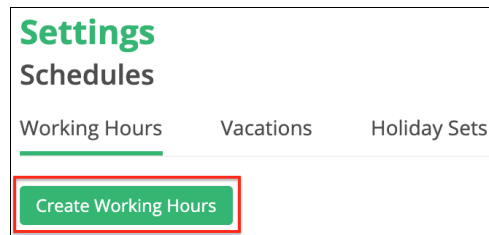
Setting Up User Schedules

Working Hours

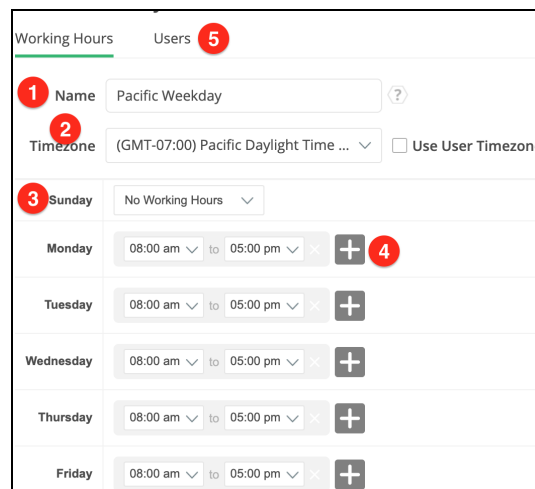
To create a set of Working Hours, navigate to **People** → **Settings** → **Schedules**.



On the Schedules page, under the Working Hours Tab, click on the **Create Working Hours** button.



You will be taken to a page where you can create a set of working hours which you can later assign to specific Users.



1. **Name:** You will name your set of Working Hours here.
2. **Timezone:** You will select the Timezone for these working hours from a dropdown. Additionally, LeanData can simply use whichever timezone has been given to a User on their Salesforce User record. Check the **Use User Timezone** box for this option.

- **Note:** if you use this option, please check the User's Salesforce record to ensure they have the correct time zone assigned to them.
3. **Daily Hours:** You will configure the working hours for each day of the week
 4. **Additional Hours:** you can create multiple, discrete blocks of working hours each day
 5. **Users:** After you have assigned this set Working Hours, you can click on the Users tab to see which Users have been assigned this set of Working Hours

Note: You will not be able to save a set of Working Hours until you input Working Hours

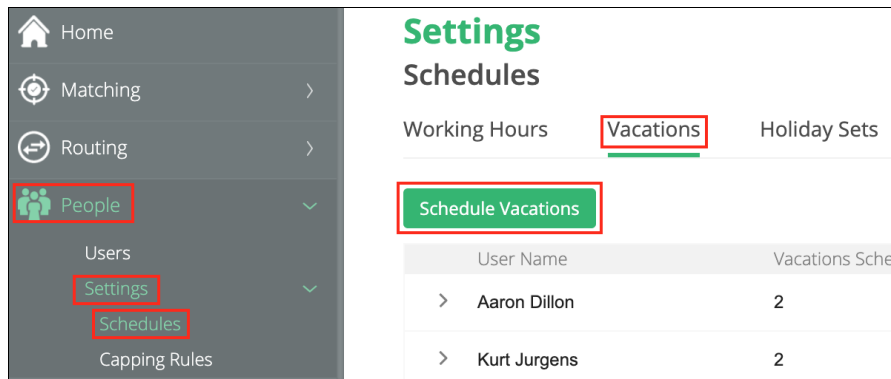
Vacations

If you would like to schedule Vacations for Users, navigate to the **People** → **Settings** → **Schedules** → **Vacations** page. On The Vacations tab, you will see a list of all the Users with Vacations already scheduled. If you are a Pool Manager without LeanData Custom Objects Full Access Permission Set, you will only be able to see the Vacations for Users in the Pools you manage.

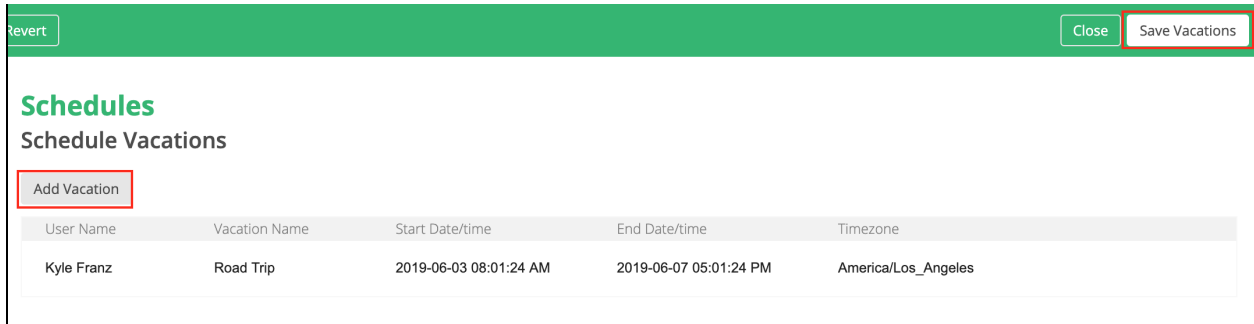
If you are only a Pool Member, without any additional permissions and not designated as a Pool Manager, you will only be able to see your own Vacations.

Clicking on a User's row will show you a dropdown with all the Vacations associated with them. Clicking on the User's name will take you to their User Page in the LeanData People section.

To schedule another vacation, click on the **Schedule Vacations** button.



On the Schedule Vacations page, if you click on the **Add Vacation** button, and you will see a row appear that allows you select a User, name the specific Vacation, then set the time of the Vacation.



User Name	Vacation Name	Start Date/time	End Date/time	Timezone
Kyle Franz	Road Trip	2019-06-03 08:01:24 AM	2019-06-07 05:01:24 PM	America/Los_Angeles

Note: Please ensure the User's time zone is correctly assigned in their Salesforce User Record

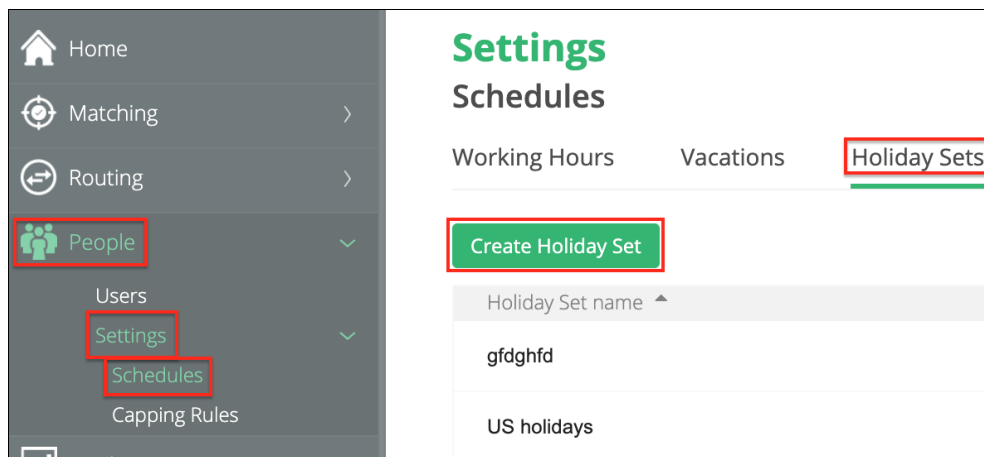
After hitting **Save Vacations** in the upper right hand corner, these Vacations will be scheduled for these Users.

Holidays

You can create and assign Holiday Sets by navigating to the **People** → **Settings** → **Schedules** → **Holiday Sets** page.

The Holiday Sets tab will show you all of the Holiday Sets you have already created.

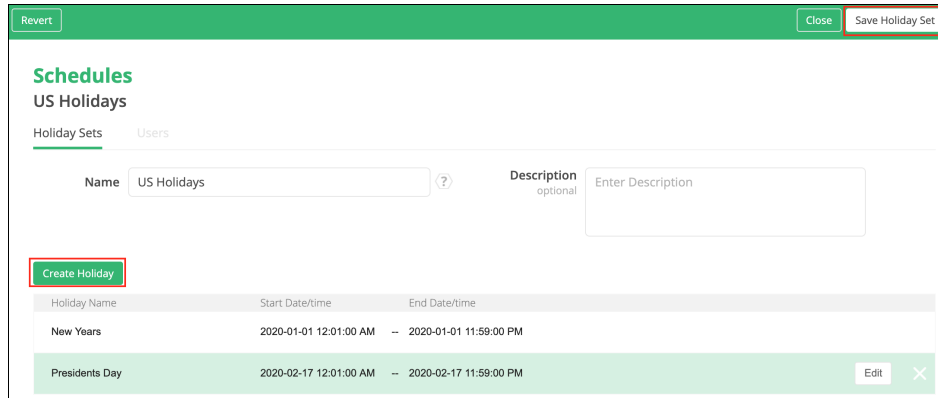
To create a new Holiday Set, click on the **Create Holiday Set** button.



On the Holiday Sets page, you can name your Holiday Set and add an optional description, then add the individual Holidays that make up that Holiday Set by clicking the **Create Holiday** button and defining the Holiday Start and End Date/Times. LeanData will consider these dates in relation to the time zone assigned to the User in Salesforce.

If you need to make edits or delete a Holiday, you can hover over the Holiday you wish to edit or delete.

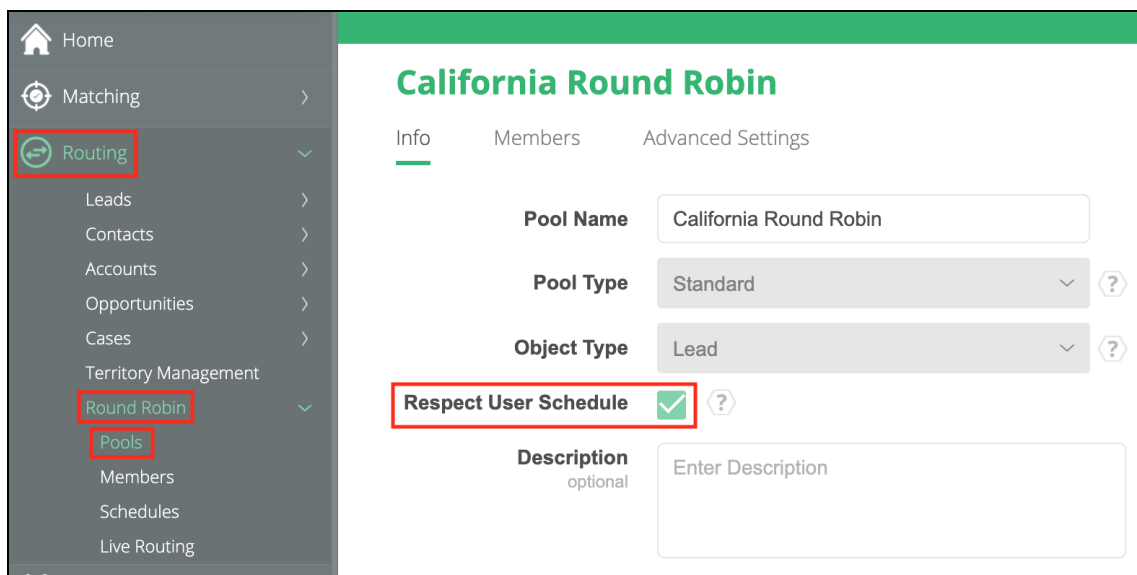
When you are finished, you can click on the **Save Holiday Set** button in the upper right corner.



Clicking on the **Users** Tab will take you to a page that shows you all the Users that are currently assigned this Holiday Set, if any.

Respecting User Schedules in Round Robin Pools

After setting a User's Schedule, you can set a round robin pool to respect their schedule by checking the box to Respect User Schedule in their Pool Settings. By default, this box will not be checked and newly created pools will route to pool members 24/7, regardless of their schedule. This can be configured by selecting the desired pool in **Routing** → **Round Robin** → **Pools**.

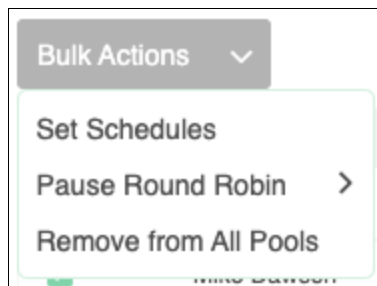


Assigning Schedules

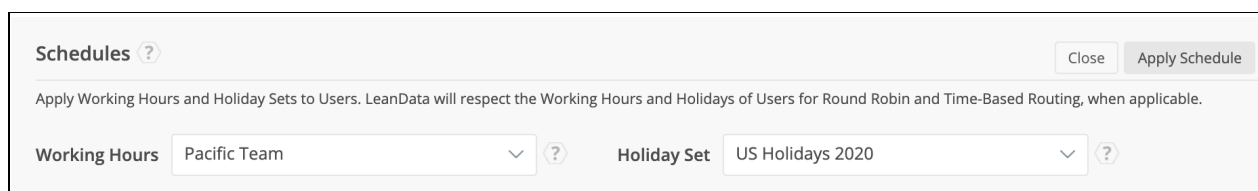
The People Section will allow you to assign schedules to the Users. Navigate to **People** → **Users** to get to the Users Page.

On this page, you will see all the Users and queues in your round robin pools. LeanData Admins will be able to manage all Users. Pool Managers who are not also LeanData Admins will only be able to manage the Users in the pools they manage.

You can set Working Hours and Holiday Sets in bulk by selecting the Users you wish to configure, then clicking **Bulk Actions**, then **Set Schedules**.



After selecting the Working Hours and Holiday Sets you wish to apply to the selected Users, click the **Apply Schedules** button.



Clicking into any individual User will take you to a page where you can see and configure pool membership or the schedule assigned to that specific User.

Pausing Round Robin

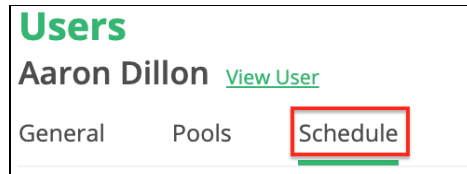
After selecting the desired Users, you can pause their participation in a Round Robin pool by selecting Bulk Actions, then Pause Round Robin, and then select the period to pause them for.

Options include:

- Indefinitely
- 30, 60, 90 minutes

Managing a User's Schedule

To manage the elements of a specific User's Schedule (Working Hours, Vacations, Holiday Sets) click on that User, then click the **Schedule** Tab.



This will take you to a page where you can individually assign a User's Working Hours, Vacations, & Holiday Sets.

Working Hours

By clicking into the **Working Hours** Tab, you will see the current set of weekly Working Hours applied to this User. You can assign a different set of Working Hours via the dropdown on this page.

Users

Aaron Dillon [View User](#)

General Pools **Schedule**

Working Hours Vacations Holidays

Pacific Weekday Hours ▾

Sunday	No Routing Scheduled
Monday	08:00 am to 05:00 pm
Tuesday	08:00 am to 05:00 pm
Wednesday	08:00 am to 05:00 pm
Thursday	08:00 am to 05:00 pm
Friday	08:00 am to 05:00 pm
Saturday	No Routing Scheduled

When you are finished with your edits, click on the **Save User** button in the upper right.

Vacations

By clicking into the **Vacations** Tab, you will see a list of the current and past Vacations assigned to this User.

Hovering over a currently scheduled Vacation will allow you to edit or delete that Vacation.

To schedule another Vacation for this User, click the **Add Vacation** button.

Users
Aaron Dillon [View User](#)

General Pools **Schedule**

Working Hours **Vacations** Holidays

Add Vacation

Vacation Name	Start Date/time	End Date/time	Timezone
Hawaii	2019-06-03 11:44:57 AM	2019-06-07 11:45:10 AM	America/Los_Angeles

Expired Vacations

Vacation Name	Start Date/time	End Date/time	Timezone
summer	2019-04-19 02:48:13 PM	2019-04-20 02:48:15 PM	America/Los_Angeles

When you are finished with your edits, click on the **Save User** button in the upper right.

Holiday Sets

By clicking into the **Holidays** Tab, you will see the current Holiday Set applied to this User. You can assign a different Holiday Set via the dropdown on this page.

Users
Aaron Dillon [View User](#)

General Pools **Schedule**

Working Hours Vacations **Holidays**

US Holiday ▼

Holiday	Date
New Years	2020-01-01
Presidents Day	2020-02-17

When you are finished with your edits, click on the **Save User** button in the upper right.

For more information on Round Robins, please see the [Round Robin Overview Guide](#). For additional questions, [please open a ticket with LeanData Support](#).