

LeanData Routing

Custom Routing Prioritization



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Overview

When processing a large volume of records, LeanData will automatically assign a priority to a record based on when the record becomes eligible for routing, but also by the type of action LeanData is taking on the record. Records are actioned in the order of their assigned priority, allowing more urgent records to be processed more quickly.

Custom Routing Prioritization allows you to customize the priority given to records, based on your own entry criteria across all routed objects, using a numerical priority configured in your entry nodes.

This will allow you to:

- Ensure speed-to-lead
- Prioritize your most important leads and records
- Quickly adjust priorities even as you change your routing graph

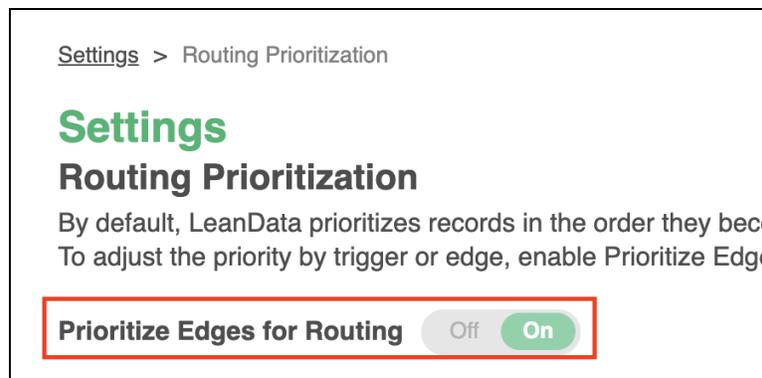
Enabling Routing Prioritization

By default, all records will be given the same priority, and will be processed according to when they became eligible for routing. If you would like to assign your own custom priority, you will first need to enable routing prioritization.

Enable Routing Prioritization

Navigate from the LeanData Dashboard, from the left sidebar, navigate to **Admin > Settings > Advanced > View Priorities**

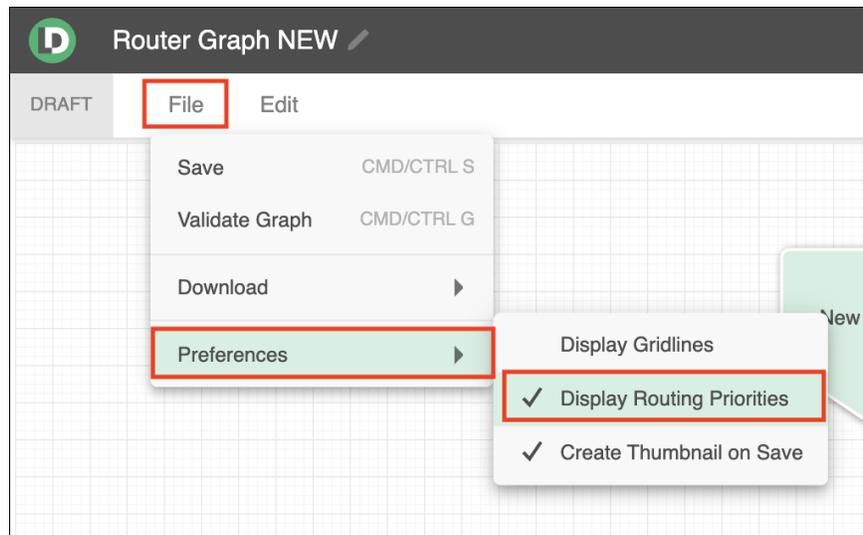
Ensure that the **Prioritize Edges for Routing** toggle is set to ON.



Ensure Routing Priorities are visible in Flowbuilder

Once the feature has been enabled, open the FlowBuilder graph where you would like to set the priority.

In the Menu Bar at the top, under **File > Preferences**, ensure that **Display Routing Priorities** is checked.



Configuring Custom Routing Prioritization

Routing priority is customized in the entry nodes you are using in your graphs. Within each entry node, across all of your Router objects, you can give each entry edge a numerical value that indicates the priority given to records that enter through that entry edge.

The priority number will determine which records will actually be actioned first.

New Lead Trigger

Description >

New Leads to be sent through the lead workflow

All Leads
 None
 Include the Leads below: ?

Condition	Label	Priority ? ON	Target
(Lead Source equals Demo Request)	Demo Requests	1 - High	Junk Lead?
(Lead Source equals Purchased List)	List purchase	9 - Low	Junk Lead?
(Lead Source not equal to Demo Request, Purchased List)	All Else	5 - Med	Junk Lead?

By default, records will be given a priority of "5 - Med". You can change the priority for each edge using the dropdown. And select a priority ranging from "1 - High" to "9 - Low", with a smaller number indicating a higher priority.

In the New Lead Entry node shown above, three entry edges have been created, and each has been given a priority, with Demo Requests given a priority of "1 - High" and Purchased Lists given a priority of "9 - Low", with everything else retaining the default priority of "5 - Med". This means that when there are multiple records pending processing, with some being Demo Requests and some coming from a Purchased List, the Demo Requests will be processed first, and Purchased List Leads will be processed last.

Note: If you are using the New entry node, *please ensure that you create edges for all records you wish to route, not only the ones you wish to prioritize*. For example, if you create an entry edge for "Demo Requests" and another entry edge for "List Purchases", you will need to create a third edge for records that fit neither of those criteria, if you intend to process those records through LeanData as well.

Records with the same priority will all be processed before records with a lower priority, but you will not be able to further sub-prioritize between records with the same priority number. If you do need to prioritize records with more granularity, you have 9 distinct priority levels to utilize.



The order in which the edges appear in the list has no bearing on the order in which the records will be actioned. The order the edges are listed only determines which criteria the record will be evaluated against first -- much like the sequence of nodes in a graph -- but will not control when it will be processed relative to other records.

Once you deploy this graph, these custom priorities will be assigned to the records processed by that graph.

For additional questions, [please open a ticket with LeanData Support](#).