LeanData Admin

Migrating LeanData between Salesforce Instances

Overview

LeanData admins will often have to move configurations of LeanData from one Salesforce instance to another, whether that be moving from a Sandbox instance to a Production instance, or moving from one Production environment into another. While you can re-create your LeanData setup from scratch, there are some tools you can use to migrate your settings and preferences to save time. This guide will outline the main steps necessary to migrate LeanData from one environment to another.

Note: The steps below are for reference, and only outlines the most common steps necessary to migrate a LeanData configuration from one instance to another. Your specific configuration of LeanData may have some customization that cannot easily be migrated to a different instance. Please reach out to LeanData support if you would like someone to guide you through this process.

Installation and Provisioning

LeanData Package Installation

Ensure the latest version of LeanData is installed in the destination Salesforce instance. You can find the latest general release version on the Salesforce AppExchange.

Note: if you are on a later version than the general release version on the Salesforce AppExchange, you may need to request an upgrade from LeanData support to ensure feature compatibility.

Authorization and Provisioning

After installation, ensure you Authorize a LeanData Token through your LeanData API User. If you are operating under LeanData's Blind configuration mode, you do not need to complete this step.

After Authorizing your token, please reach out to your LeanData Customer Success Team to enable the proper products. If you are operating under a Blind configuration mode, you will receive a file that you can upload on the LeanData Admin Settings page.

Migration and Validation

Migrating LeanData Settings

Once your products have been properly provisioned, you can begin to migrate your settings, preferences, and configurations through exporting them from your existing Salesforce instance, and then importing them to the new Salesforce instance.

LeanData Settings

Firstly, you can export / import LeanData settings, such as your Tagging Mapped Account fields, Tagging Filters & Tiebreakers, Domain matching settings, Owner mappings, Duplicate merging preferences, etc. You will be able to choose which settings you would like to carry over before exporting / importing them. For more detailed instructions, please see [Importing / Exporting LeanData Settings](#).

Territories

If you are using LeanData's Territory Management feature, you may export / import your territory segments as well. For more detailed instructions, please see [Importing and Exporting Round Robin Pools and Territories](#).

Round Robin Pools

If you are utilizing LeanData Round Robin Pools, you may import your Round Robin Pools. For more detailed instructions, please see [Importing and Exporting Round Robin Pools and Territories](#).

Migrating LeanData Routing Graphs for Each Object

After migrating your LeanData Settings, Territories, and Round Robin Pools, you can then export and import the different Routing Graphs that you may be utilizing. You will need to export and import each individual graph you wish to migrate for each object. More detailed instructions can be found in [How do I Import and Export my Router Flow](#)?

When Importing, you may see a message indicating discrepancies that you may need to address. This is common when migrating Routing graphs between Salesforce instances, as some of the fields and values you may be referencing in one instance may be different in your new instance. You will still be able to import these graphs, but you will need to address any discrepancies before deploying.

Validating Graphs

It is important to open each graph, and use the **Validate Graph** feature to ensure that each of your graphs are valid and ready to deploy. Nodes that need adjustment should be highlighted in red in your graph. You will need to resolve these errors before deploying the graph.

Integration User and LeanData Jobs

Once all of your settings and Router graphs have been migrated and validated, you will need to designate an Integration User, who will be the User of record for LeanData actions. Once you have decided on a User to serve as the Integration User, please ensure they have the proper Permission Sets. We recommend that the Integration User have the **LeanData Custom Objects Full Access Permission Set**.

Once your Integration User has the proper permissions, have that User login and restart the **LeanData Scheduler**. This is what initiates the LeanData Continuous Job. For more detailed instruction, please see How Do I Change the LeanData Integration User?

Deployment & Verification

Once the Integration User has started the LeanData Continuous Job, please disable any redundant assignment rules or other conflicting processes (i.e. SFDC Lead Assignment Rules, Process Builders, Workflows, custom code, etc).

You may then deploy each of the Routing Graphs that you have previously migrated and validated.

Support and Troubleshooting

Once you have deployed your graphs, double check the LeanData Job Status to ensure it is running as expected.

After some time has passed, please also check your Audit Logs and Routing Insights to ensure that records are getting assigned correctly.

If you need to temporarily stop LeanData Routing, you may deploy a new graph with all Entry Nodes set to "**None**" to halt routing for that object or business unit. You may then re-activate any previous automations like SFDC Lead Assignment Rules if needed.

If you need assistance, it may be helpful to temporarily grant Support Access to LeanData to better help troubleshoot.

For additional questions on migrating LeanData from one Salesforce instance to another, please open a ticket with LeanData Support.