LeanData Routing

Case Router Guide

Overview 3

General FlowBuilder Actions 3

- Accessing FlowBuilder 3
- Adding & Editing Graphs 3
- Deploying a Graph 5

General Node Actions 7

- Adding Nodes 7
- Deleting Nodes 8
- Editing Nodes 8
- Copying Nodes 8
- Connecting Nodes 9
- Node Colors 10
- Multi-Node Actions & Shortcuts 10

Node Guides 11

FAQs 11

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Overview

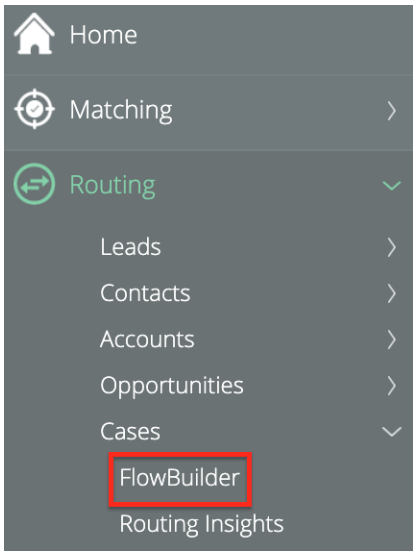
LeanData Case Router gives organizations a visual interface (FlowBuilder) to create and manage case routing logic, ensuring that cases get assigned to the appropriate owner automatically. Case Router allows you to create routing logic based on case criteria, as well as any associated records such as accounts and contacts.

In addition to assigning cases to the correct owners, Case Router offers you powerful actions such as notifications and round robin functionality.

General FlowBuilder Actions

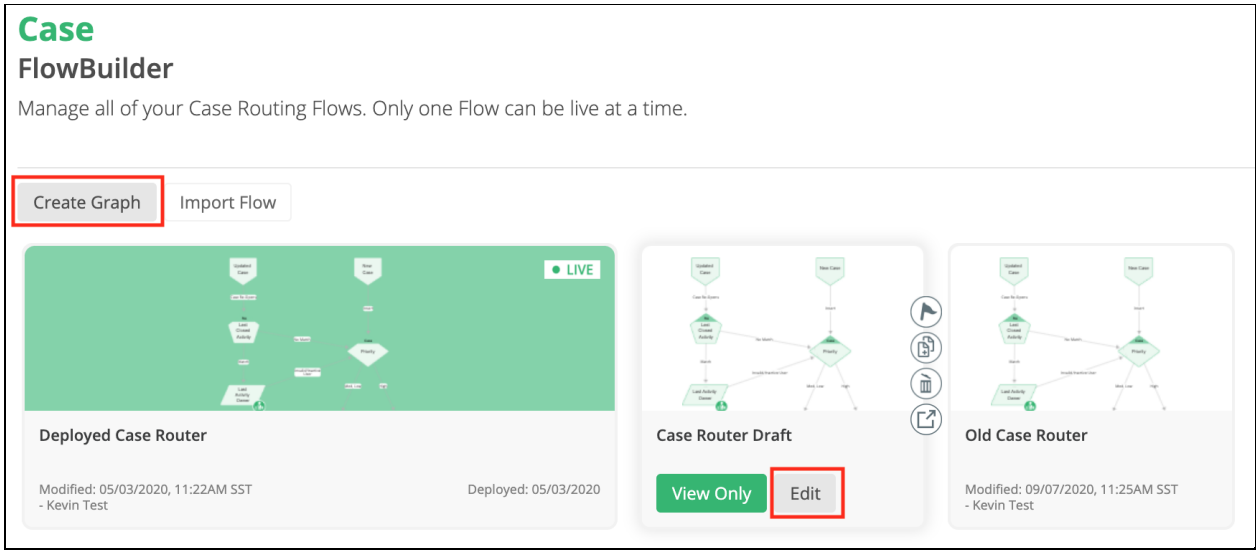
Accessing FlowBuilder

1. Click on the LeanData tab from SalesForce.
2. Within LeanData click Routing → Cases → FlowBuilder

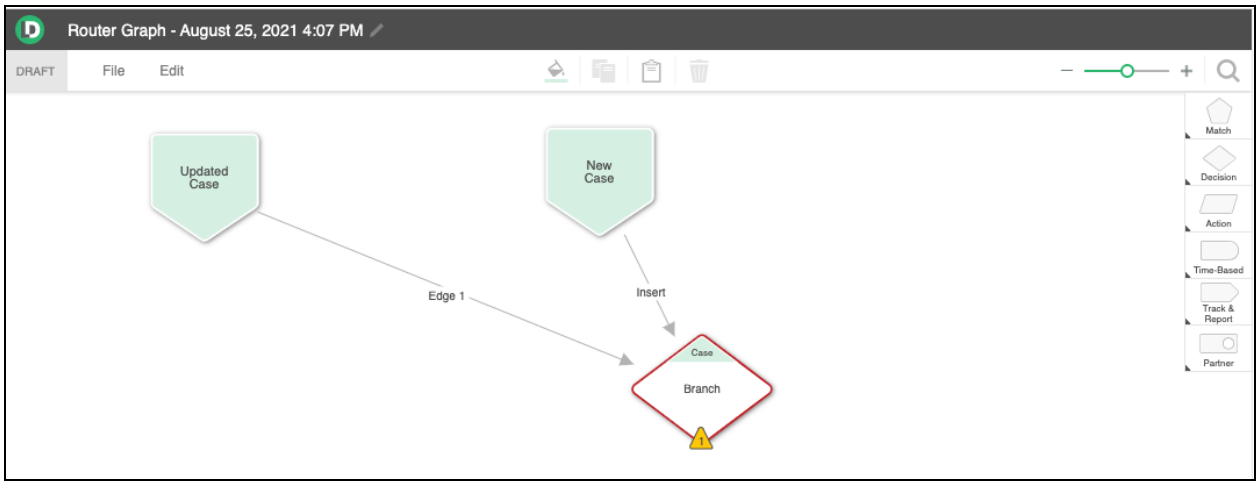


Adding & Editing Graphs

You can create a new graph by clicking the “Create Graph” button on the main FlowBuilder page, or you can edit an existing graph by hovering over its tile and clicking the “Edit” button that appears on the tile.

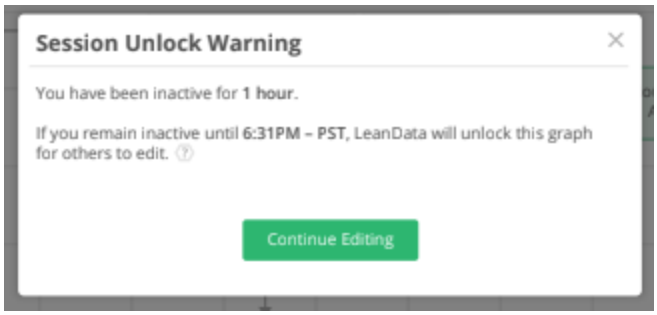


Please Note: The Graph Editor opens a new graph or an existing one in a new browser tab to give you a full screen view of your graph.



Graph Locking

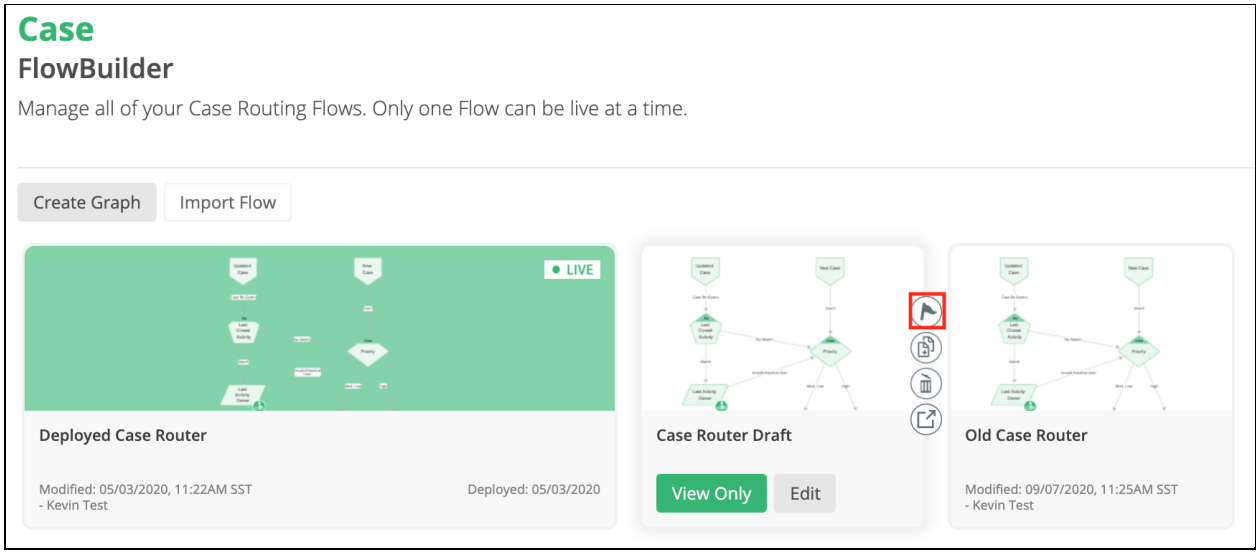
When you have a graph open for editing, the graph will be locked to others so that two people cannot edit a graph at the same time. If there is no activity for 2 hours on the locked graph, it will automatically be released so that it can be edited, by anyone with access to the graph.



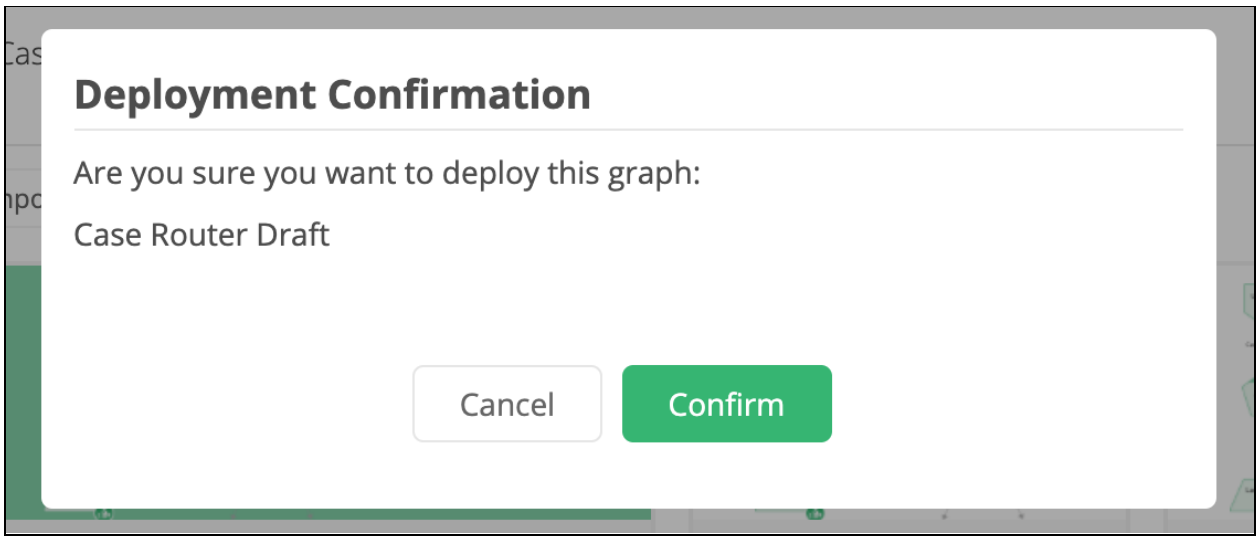
Example: *Admin Melissa opens a graph to edit, but gets pulled into back-to-back meetings and activities before finishing their work. But Admin John needs to make edits! The graph will become auto-unlocked for John to modify after Melissa has been inactive for two hours.*

Deploying a Graph

To deploy a graph, hover over the graph you wish to deploy, then select the flag icon to deploy that graph.

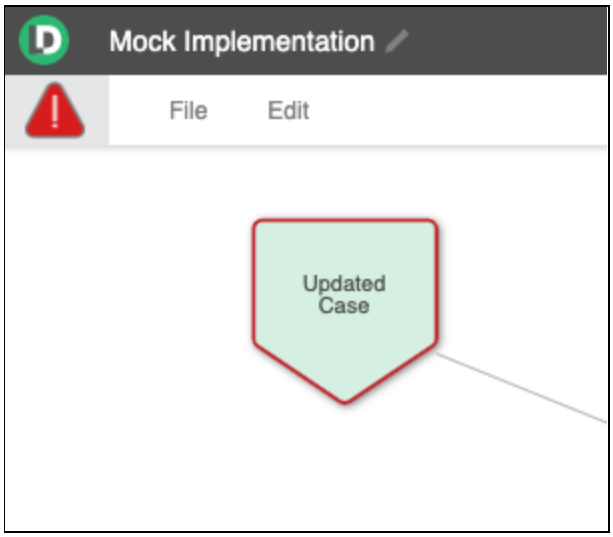


You will get a Deployment Confirmation. Select Confirm to deploy the deployment. If you already had a graph deployed, it will automatically be deactivated.

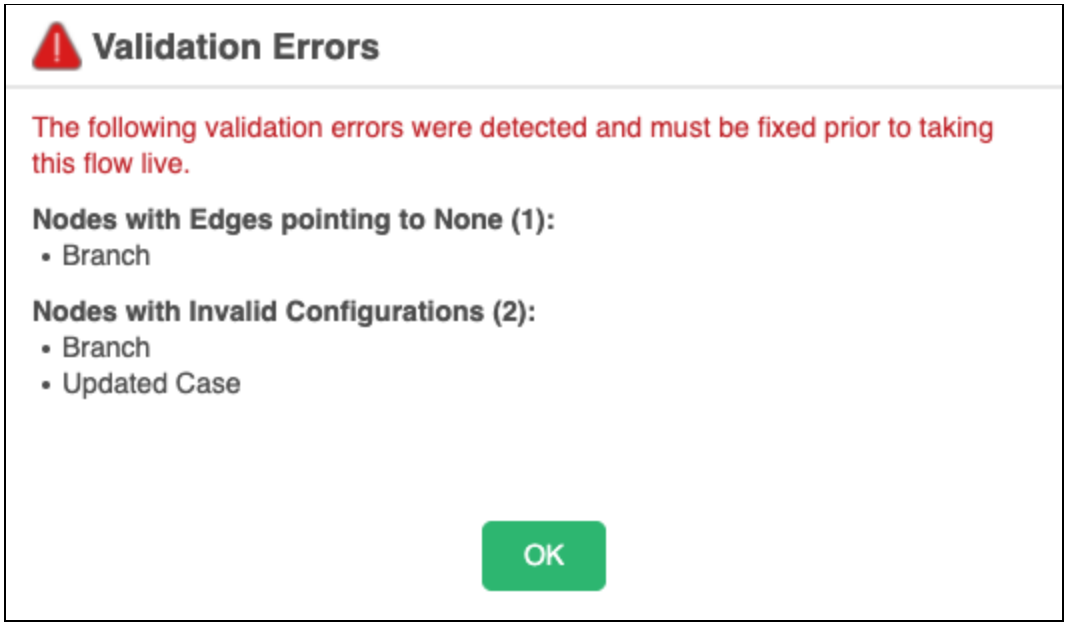


Please Note: Only valid graphs (graphs without errors) are eligible for deployment

When you open a graph, LeanData will validate the graph and if your graph is showing validation errors, the nodes with issues will be outlined in red.



Clicking on the red triangle in the upper left corner of the Graph Editor will open a pop-up window with a list of the validation issues that must be resolved before deploying the graph.

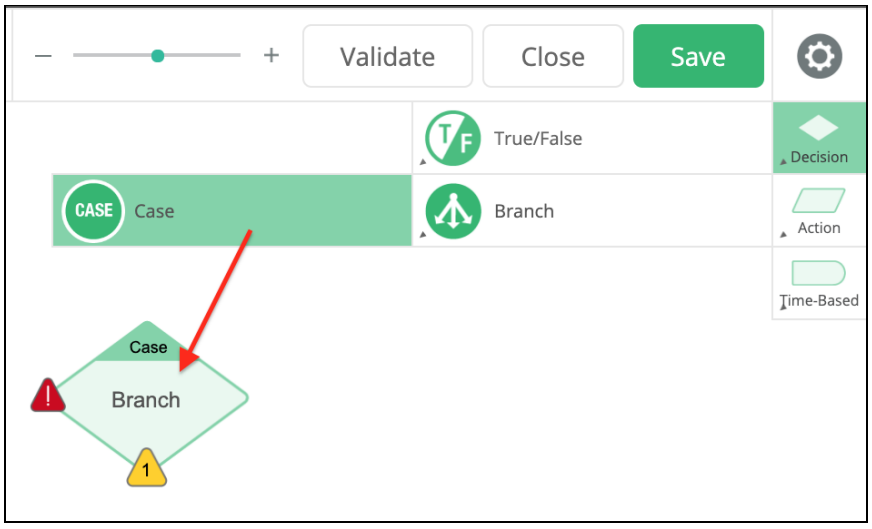


General Node Actions

Once within a graph, you can customize your case routing logic utilizing nodes that will contain the different matching functions, decision criteria, or actions you wish to take.

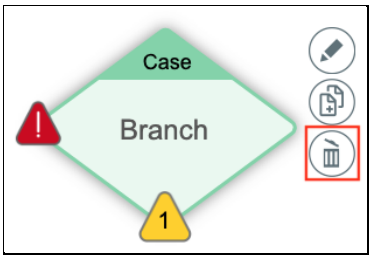
Adding Nodes

Once within a graph, to add a node, use the node bar in the top right corner and hover over the node options and either click on the node you wish to add or drag it into the main area.



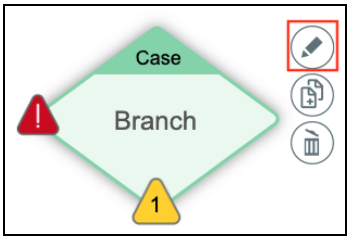
Deleting Nodes

To delete a node, single click on the node you wish to delete, then click the Garbage can icon to delete the node.



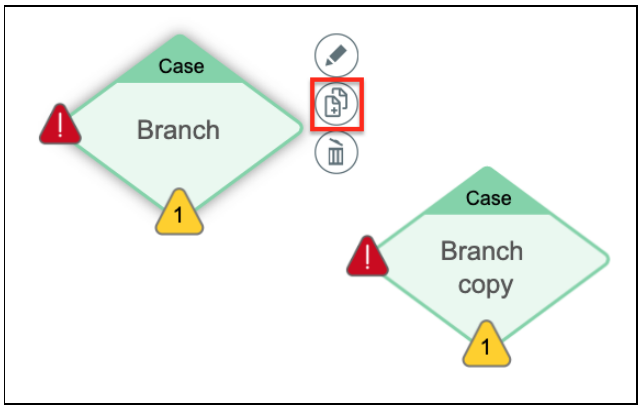
Editing Nodes

To edit a node, single click on the node you wish to edit, then select the Pencil icon to edit the node or you can double-click on the node itself to edit the conditions within the node.



Copying Nodes

You can copy nodes in 2 ways depending on your needs. To copy a node to be used in the current graph, single click on the node you wish to copy, then select the Copy icon to create a copy of that node. A copy of your node, including the conditions within it, will appear in your graph.



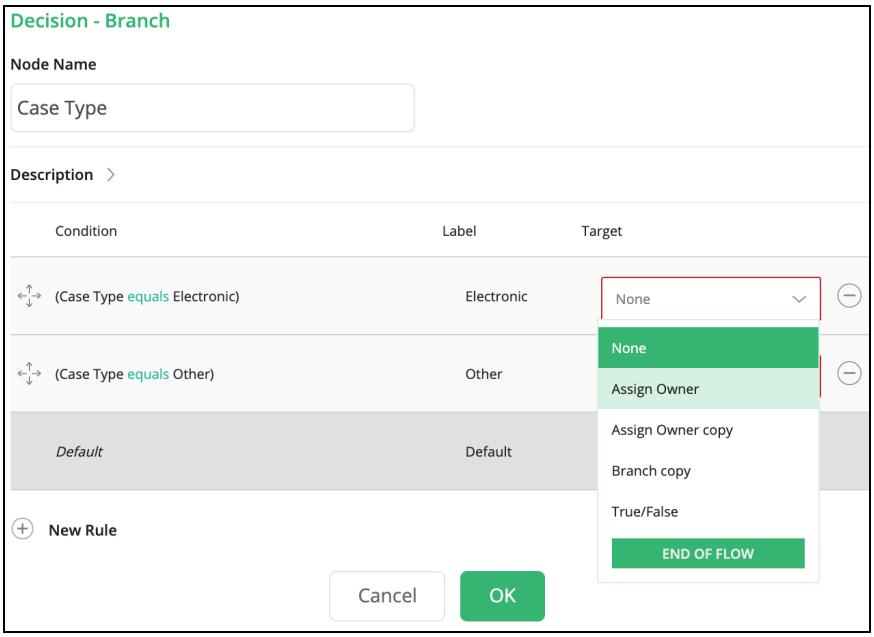
You can also use the icons in the menu bar at the top of the page or the options in the **Edit** menu, as well as keyboard shortcuts to Copy (CTRL/CMD+C) and Paste (CTRL/CMD+V) the node(s) you wish to duplicate.

You can also copy nodes to be pasted into other graphs. Click on the desired node to select it, then select Copy from the Edit Menu. Open the target graph and select Paste from the Edit menu to paste the copied nodes into the graph.

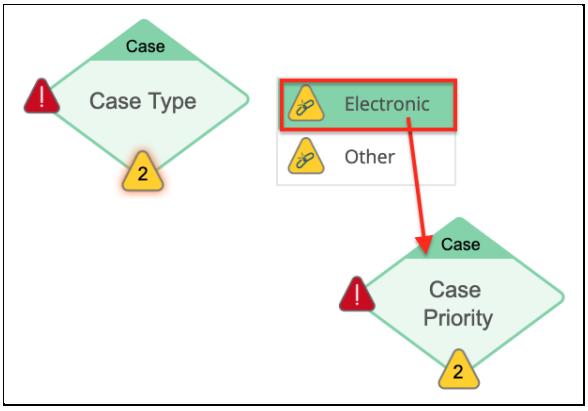
Connecting Nodes

You can Connect nodes in one of two ways:

1. Open a node and select the “Target” through the dropdown next to the condition or outcome you wish to assign. Use the search functionality to narrow the scope of the results. If you want case processing to stop at your selected node, simply select “End of Flow”



2. Click on the yellow triangle and drag that branch to the next node you wish to utilize if that condition is met



Node Colors

You can give your nodes different colors to help you organize your Routing graph, and more easily delineate different sections or functions within your Routing Graph. The color of a node will have no bearing on the functionality of the node and is only used to visibly distinguish nodes.

To change the color of new nodes you create, select your desired color from the node color palette at the top of the page.

New nodes will have the selected color until you select a different color from the palette. Copied nodes will keep the color of the original node.

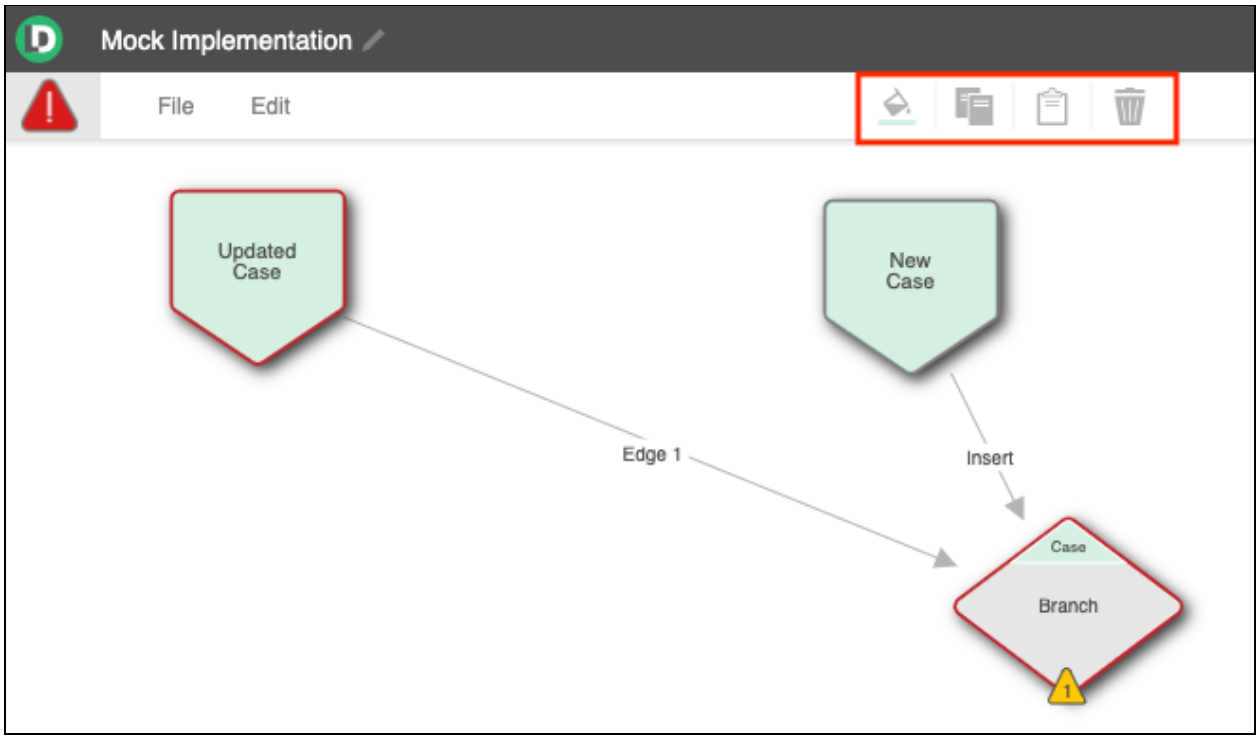
To change the color of existing nodes on your graph, select the node(s) you would like to change, then pick the desired color from the palette, and the selected nodes will change to the selected color.

Multi-Node Actions & Shortcuts

If you need to select multiple specific nodes, you can hold Cmd (Mac) or Ctrl (PC) and then click on the different nodes you wish to select.

Alternatively you can also select multiple nodes by holding down the Shift key and dragging your cursor to highlight an entire area. All nodes that fall into the highlighted area will be selected.

Once you have selected your desired nodes, you can either use system Copy (Cmd/Ctrl+C), Paste (Cmd/Ctrl+V), or Delete (Delete Key) shortcuts, or you can use the buttons in the menu at the top of your screen, to perform the desired actions.



Node Guides

There are many nodes that are available to you in LeanData Router. For more detailed information on these nodes and how they function please see our Node Guides in the LeanData Help Center.

For additional help and assistance, please submit a ticket to LeanData Support.

FAQs

Can I use an account field to trigger a Route on Update condition to re-route a case?

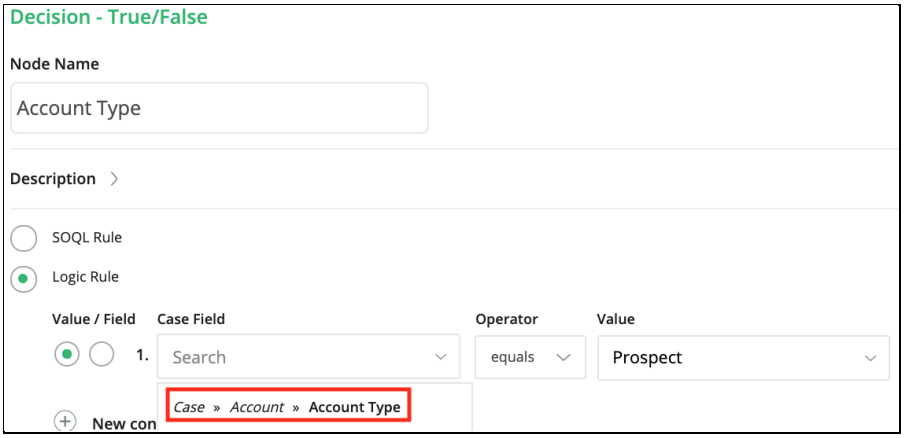
You can only use fields that are located on the case object itself to trigger a case re-route. So while we can use changes to the Account Lookup field itself (on the case object), we cannot use any changes on a field located on the associated Account record to trigger a case re-route.

Is it possible to de-dupe cases?

Case Router does not de-dupe case to case.

Is it possible to match orphan cases to matched accounts?

No, Case Router can only route cases to Round Robin groups or explicit owners

In decision nodes, can we access fields on the account to route cases?

Yes, in decision nodes you can access fields on the associated account record, or any record to which the Case has a Lookup relationship.