LeanData Admin

Using Data Loader for Round Robin Pools

Overview

Typically, Round Robin Pools are created manually in a test environment and then exported and imported into a production environment. For very experienced Salesforce administrators, pools can be created using Salesforce's Data Loader tool. Data Loader is a client app that you install on your computer for importing into Salesforce. With Data Loader, you can mass-create, edit, and upsert Round Robin Pools. This method does not support setting capping or custom weighting.

Please Note: Using Data Loader to create Round Robin Pools can be problematic if done incorrectly. LeanData ***strongly recommends*** that you reach out to Support or your CSM to help you.

Please Note: This guide is not designed to teach you how to install, configure, or use Data Loader. This guide is recommended only for experienced users.

Prerequisites

Please review the following prerequisites before using Data Loader with your Round Robin pools.

Data Loader

Please check to ensure that Data Loader is installed. Navigate to Setup > Data Loader > Download, if needed.

Permission Sets

Ensure that the user uploading pools (typically the admin user) has read/write access to the objects below and the fields within the files for each object.
- Round Robin Pool (LeanData__Round_Robin_Pool__c)
  - Round Robin Pools
- Round Robin Setting (LeanData__Round_Robin_Setting__c)
  - Round Robin Pool Members
- Access Level Assignment (LeanData__Access_Level_Assignment__c)
  - Round Robin Pool Managers

Sample Files

We have included the following sample files to help you understand how to format the Data Loader source information.

- Pools to Insert (to be uploaded into Round Robin Pool)
- Pool Members to Insert (to be uploaded into Round Robin Setting)
- Pool Managers to Insert (to be uploaded into Access Level Assignment)

Process

Data Loader has 3 options, Please choose the option that best fits your needs.
Insert: Creating a new record
Update: Editing an existing record
Upsert: Creating or editing a record

Please Note: Salesforce supports 2 versions of IDs. There is a 15 character and an 18 character version. For Data Loader, use the 18 character version.

You can find a user's user ID by navigating to Setup > Users > User's Profiler. Copy the 18-digit User ID from the URL.

Create, Edit, or Upsert Pools

1. Prepare the Data Loader file. Each row represents a unique pool. Use the sample file from above and modify the columns according to the following.
2. Each row represents a different pool to be created.
   a. LEANDATA__GROUPING_NAME__C is the name of the pool.
   b. LEANDATA__OBJECT_TYPE__C is the object type of the pool (Lead, Contact, Account, Opportunity, Case).
   c. LEANDATA__RESPECT_USER_SCHEDULES__C specifies whether the pool respects schedules or not (TRUE or FALSE).
   d. OWNERID is the ID of the person creating the pools.
      i. Replace the OWNERID column with the LD Admin's User ID
   b. Leave the other columns as-is.
      i. Optionally, you can change the POOL_TYPE__C column to the appropriate pool type:
         - Standard
         - API
         - Business Units
         - Live
2. Use Data Loader to insert your Pools to the Round Robin Pool object.

a. Make sure to create a mapping to the existing fields. If a mapping is not provided, Data Loader will not properly upload pool attributes (e.g. pool name will not be filled out).

Step 3: Mapping

Map your fields (CSV columns) to the Salesforce object.

[Choose an Existing Map] [Create or Edit a Map]

Current Field Mapping:

File Column Header	Name
LEANDATA__CAPPING_ENABLED__C	
OWNERID	
LEANDATA__GROUPING_NAME__C	
LEANDATA__USE_OWNER_TIMEZONE__C	
LEANDATA__WEIGHTING_ENABLED__C	
LEANDATA__RESPECT_USER_SCHEDULES__...	
LEANDATA__OBJECT_TYPE__C	

[< Back] [Next >] [Cancel] [Finish]

3. Empty pools will now be available in LeanData's Round Robin UI. Use the Pool IDs in the Data Loader Success File that saves after import for the next steps.

Create, Edit, or Upsert Pool Members into Existing Pools

1. Prepare a list of Pool Members to insert into the Round Robin pools you've created in the previous section. Use the sample file from above and modify the columns according to the following. Each row represents a member per pool.

2. **Please Note**: Following these steps will NOT replace the last modified date & last modified by values with correct values. You need to specify the correct Last Saved By and Last Saved Date if you wish to change these values.
    a. LEANDATA__OWNERID__C and LEANDATA__USER_OWNER__C is the pool member's user ID.
    b. LEANDATA__USER_OWNER__C should only be filled out for Users that are not queues. If the Pool member is a Queue leave LEANDATA__USER_OWNER__C blank
        ■ **Best Practice** - add another column to the end of the file that includes the Users name for easy reference (note: you will not map this file on upload)
    c. LEANDATA__POOL__C is the pool's ID from the previous section.
        ■ **Best Practice** - You can add the pool name into another row at the end of the file and use a vlookup or match + index formula and reference your 'Round Robin Pool Creation' success file to populate the Pool ID (note: you will not map this file on upload).
    d. LEANDATA__OWNER_ORDER__C specifies the order of the members in your pool. Numbering starts at 0. You cannot skip orders such as putting order 1 for a new member without a member with order 0.
        i. **Best Practice** - Enter this formula: =IF(D2<>D1,0,C1+1) into a blank cell beside your data, C2 (make sure to paste as plain text prior to saving the csv).
    e. For weighted pools, change the value of LEANDATA__WEIGHTING_VALUE__C.
    f. It is recommended that you put the name of the member along with the ID under Name, but it is not required.
2. Use Data Loader to upload your Pool Members into the Round Robin Setting object. Your pools will now have members.

Create, Edit, or Upsert Pool Managers into Existing Pools

1. Prepare a list of Pool Managers to insert into the Round Robin pools you've created in the previous section. Use the [sample file](#) from above and modify the columns according to the following. Each row represents a manager per pool.
    a. LEANDATA_USER__C is the pool manager's user ID.
        i. **Best Practice** - add another row to the end of the file that includes the Users name for easy reference (note: you will not map this file on upload)
    b. LEANDATA_ROUND_ROBIN_POOL__C is the pool's ID from the Pools section above.
        i. **Best Practice** - add the pool name into another row at the end of the file and use a vlookup from your 'Round Robin Pool Creation' success file to populate the Pool ID (note: you will not map this file on upload)
    c. LEANDATA_UNIQUE__NAME__C is the concatenation of LEANDATA_USER__C and LEANDATA_ROUND_ROBIN_POOL__C with a period between them.
        ■ **Best Practice** - use the formula =concatenate(A2,".",C2) to populate this field (make sure to paste as plain text prior to saving the csv)
    g. Leave the other column as they are.
2. Use Data Loader to upload your Pool Managers into the Access Level Assignment object.