

LeanData Routing

Routing Scheduler Overview



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Overview

The LeanData Routing Scheduler feature allows bulk processing of Leads, Contacts, Accounts, and/or Opportunities through the LeanData Routing platform using a CSV file to upload a list of unique Salesforce IDs or a SOQL query to identify the records to process. Additionally, you can schedule your routing jobs to run now or in the future.

Definitions

- **Scheduled Routing Job**
 - A batch of leads, contacts, accounts or opportunities processed through a specified Routing graph which runs independently of any continuous routing you may have enabled in your instance.
- **CSV file**
 - The file that contains the IDs of the records you wish to route must be in a Comma Separated Value (comma delimited) file format.

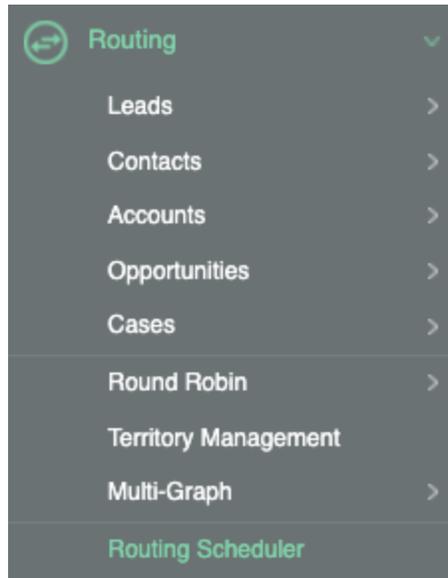
When to use Scheduled Routing

A few common use cases where you may need to use a Scheduled Routing job are:

- Routing records that did not meet your expected routing criteria.
- Routing records that were created prior to LeanData's implementation.
- Routing records that have special routing requirements through a Router graph that is different from the currently deployed Router graph.

Where do I access Scheduled Routing?

The Schedule Routing page will be found in the Routing Section of your LeanData Dashboard.



Routing

Routing Scheduler

Schedule one-time or recurring routing jobs for specified records.
You can use Routing Scheduler for regularly scheduled org changes or cleanup, such as Account-Contact alignment. [Learn more about Routing Scheduler.](#)

[Schedule Routing Job](#)

Scheduled Jobs Run History

Active

Job Name	Object	Business Unit	Next Run Date	Frequency	Deployment	Modified Date	Modified By
No Active Scheduled Jobs							

Inactive

Job Name	Object	Business Unit	Last Run Date	Frequency	Deployment	Modified Date	Modified By
No Inactive Scheduled Jobs							

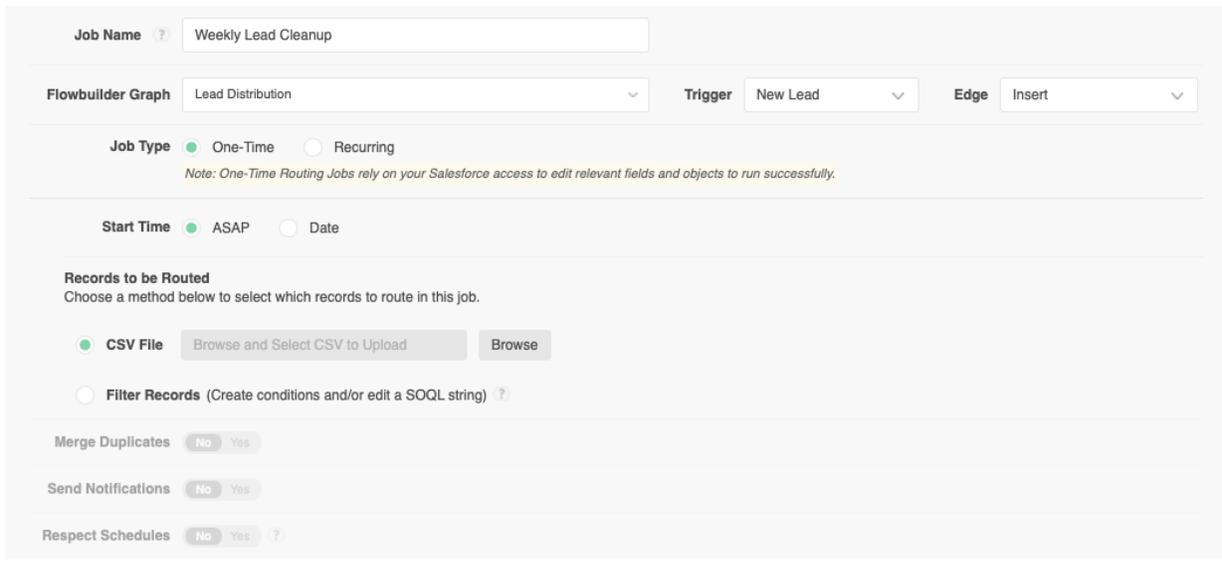
From the main screen in Routing Scheduler, you can see a list of all Active jobs, Inactive jobs, and your job run history.

How to Run a Scheduled Routing Job (One Time)

To start a new Scheduled Routing Job, click on the Schedule Routing Job button. Begin by giving your scheduled routing job a name for reference later. We suggest using a naming convention to make it easier to find the jobs when there are multiple job scheduled

Schedule Routing Job

Schedule One-Time or Recurring Routing Jobs on draft or deployed graphs. These jobs will consume Salesforce resources.



Job Name ? Weekly Lead Cleanup

Flowbuilder Graph Lead Distribution **Trigger** New Lead **Edge** Insert

Job Type One-Time Recurring
Note: One-Time Routing Jobs rely on your Salesforce access to edit relevant fields and objects to run successfully.

Start Time ASAP Date

Records to be Routed
 Choose a method below to select which records to route in this job.

CSV File Browse and Select CSV to Upload

Filter Records (Create conditions and/or edit a SOQL string) ?

Merge Duplicates

Send Notifications

Respect Schedules ?

Select Your Flowbuilder Graph

Clicking the drop down menu for the FlowBuilder graph will show you all graphs (valid/invalid) that are saved within LeanData for the object type that is being routed.



Job Name ? Weekly Lead Cleanup

Flowbuilder Graph Lead Distribution **Trigger** New Lead **Edge** Insert

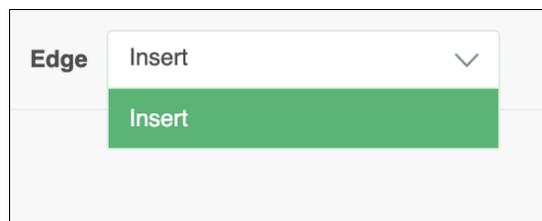
Job Type One-Time Recurring
Note: One-Time Routing Jobs rely on your Salesforce access to edit relevant fields and objects to run successfully.

Please Note: You can select graphs with errors or are otherwise invalid, however you will not be able to proceed until they are validated. Graphs with Time-Based nodes may be selected, but One-Time Routing Jobs will only complete actions that occur prior to the Time-Based Node in the graph. They will not be subject to the conditions in the Time-based node or any decisions/actions after the Time-Based node.

The “Trigger” drop down box allows you to choose whether you’d like to have your records sent through the “New Lead” node or the “Updated Lead” entry node (assuming you are routing Leads) in that graph.

The “Select Edge” drop down allows you to choose which specific path from that entry point you’d like your records to proceed through. You will want to pick the edge which aligns with the criteria that you’d like to follow for this list of records. **In this case “Insert” is the only option as the graph selected contains a single edge.*

Please Note: Your records do NOT have to meet the criteria specified in this entry condition to proceed.



The image shows a dropdown menu labeled "Edge". The menu is open, showing a single option "Insert" which is highlighted in green. The dropdown arrow is visible on the right side of the menu.

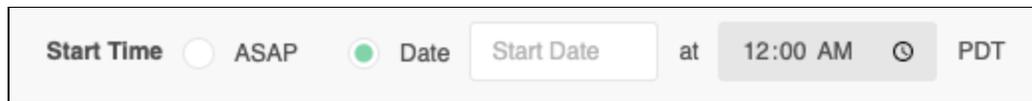
If your selected graph has merging nodes, you will see an option to enable merging for this job. This is in place as you may not want to unintentionally merge records during this job.

Job Type

Under Job Type there are 2 options, One-Time and Recurring. Select One-Time to run this routing job 1 time. Select Recurring to run this job multiple times.

Start Time

For the start time you can choose ASAP to start the job as soon as possible or Date to specify a date to start the scheduled routing job.



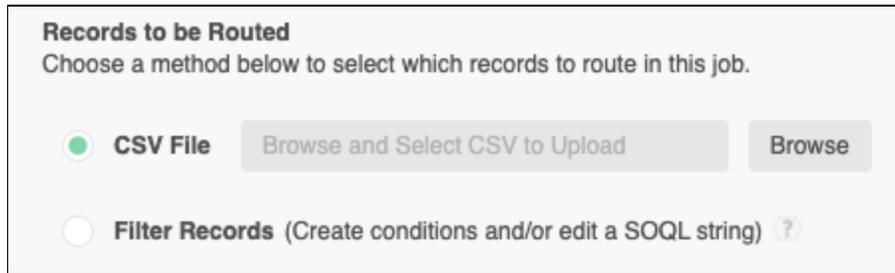
The image shows the "Start Time" configuration options. There are two radio buttons: "ASAP" (unselected) and "Date" (selected). To the right of the "Date" radio button is a text input field containing "Start Date". To the right of the input field is the word "at", followed by a time selection field showing "12:00 AM" and a clock icon. To the right of the time field is the text "PDT".

Records to be Routed

In this section, choose how you will identify the records to be routed. You can select a CSV file of record Id's or write a SOQL statement to identify the desired records.

Selecting a CSV File

Create a CSV file containing a column of the record IDs you wish to route. The IDs can either be 15 or 18 digits in length. If your CSV file contains a header row, you will need to click the button for 'Include header row at the top' under the file name and select the column with IDs.



The screenshot shows a section titled "Records to be Routed" with the instruction "Choose a method below to select which records to route in this job." There are two radio button options: "CSV File" (which is selected) and "Filter Records (Create conditions and/or edit a SOQL string) ?". The "CSV File" option has two buttons: "Browse and Select CSV to Upload" and "Browse".

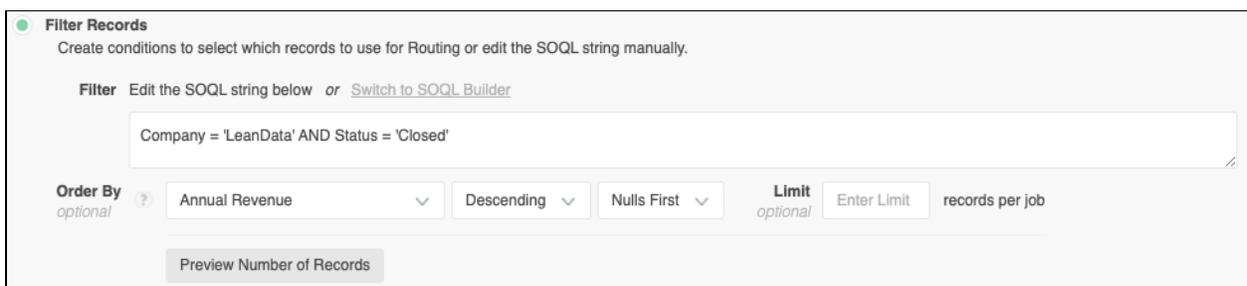
Please Note: if you export a CSV file from Salesforce, you will have to remove any copyright text that is appended to the end of your CSV.

Using a SOQL Query

Alternatively, you can use a SOQL query to identify the records you wish to process in the One-Time Routing job. You can follow the format [FieldName1 = 'Value1' AND FieldName2 = 'Value2'].

For example if you wanted to route all Lead records with a Lead Source of Event and a Status of Unqualified, you can enter [LeadSource = 'Event' AND Status = 'Unqualified'] without the brackets.

***Note:** The number of records you can include in a Scheduled Routing batch is subject to Salesforce limitations for CSV uploads and Batch Apex queries.



The screenshot shows the "Filter Records" configuration interface. It includes the instruction "Create conditions to select which records to use for Routing or edit the SOQL string manually." There are two options: "Filter" (selected) and "Switch to SOQL Builder". The "Filter" option has a text input field containing "Company = 'LeanData' AND Status = 'Closed'". Below this, there are three dropdown menus for "Order By" (set to "Annual Revenue"), "Order" (set to "Descending"), and "Nulls First" (set to "Nulls First"). There is also a "Limit" field with a text input "Enter Limit" and the unit "records per job". A "Preview Number of Records" button is located at the bottom.

You can build your SOQL statements using our manual editor or our SOQL Builder

SOQL Builder

We have included a SOQL Builder tool to help you build your queries.

Build SOQL Conditions

Create conditions to select which records to use for Routing. Build queries in the SOQL Builder, then save and extend the queries with the Free Form SOQL editor.

Lead Field	Operator	Value
1. Search	equals	

Invalid condition: check for valid fields and compatible data types.

Order By

When using SOQL statements, you can set how to order the records by picking the field to order by and configuring the settings like ascending or descending, how to deal with Nulls, and a limit on the number of records. These settings are optional.

Order By optional Annual Revenue Descending Nulls First **Limit** optional records per job

Routing Actions

If your selected graph has any action nodes that send notifications, merge duplicates, or respect user schedules, you may also want to disable these actions for this job. This allows you to prevent notifications, merging, or other actions without having to remove these actions from your graph.

Merge Duplicates

Send Notifications Email Slack Chatter

Respect Schedules

Confirmation

On this screen, you will see the details of the job summarised.

Click “Schedule Routing Job” to initiate the job.

Schedule Routing Job for Leads

Start Date ASAP

FlowBuilder Graph Lead Distribution
Trigger Edge Trigger (Edge: Insert)
Merge Duplicates No
Send Notifications No
Respect Schedules No

Notify me every time a scheduled run is complete

Please note: The User who initiates this One-Time Routing Job, not the LeanData Integration User, will be the User of record for any LeanData actions taken as a result of this job.

Scheduling a Routing Job

Sometimes it is beneficial to regularly schedule a Routing job for records that fit certain parameters. For example, if you need to regularly route new list uploaded Leads over the weekend.

Job Type One-Time Recurring

Start Date 10/29/2021 **End Date** optional 01/31/2022 **Frequency** Weekly on Fridays at 10:00 PM PDT

Records to be Routed ?
Create conditions to select which records to use for Routing or edit the SOQL string manually.

Filter Edit the SOQL string below or [Switch to SOQL Builder](#)

Company = 'LeanData' AND Status = 'Closed'

Please Note: In order to schedule a recurring routing job, you will need to use an SOQL statement to select the records to be routed.

Reviewing Scheduled Routing Audit Logs

Once your Scheduled Routing job has completed, you can review what was processed within your LeanData Audit logs.

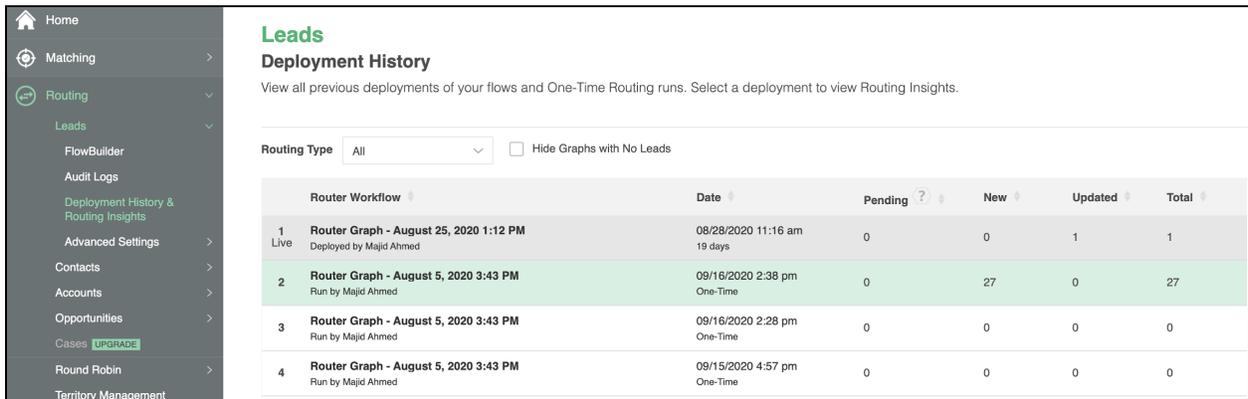
In the LeanData Dashboard, select Routing -> Leads (or whichever object is applicable) -> Audit Logs.

Reviewing Scheduled Routing Insights in Deployment History

You can also review the Routing Insights for the Scheduled Routing job you ran. Routing -> Leads (or whichever object is applicable) -> Routing Insights and Deployment History. Each Scheduled Routing Job will be displayed as a separate deployment.

Please Note: When you click on Routing Insights and Deployment History, the currently deployed Router Graph will be displayed on a new browser tab. The Deployment History will be on the original tab.

On this screen you will select which deployment you would like to look at:

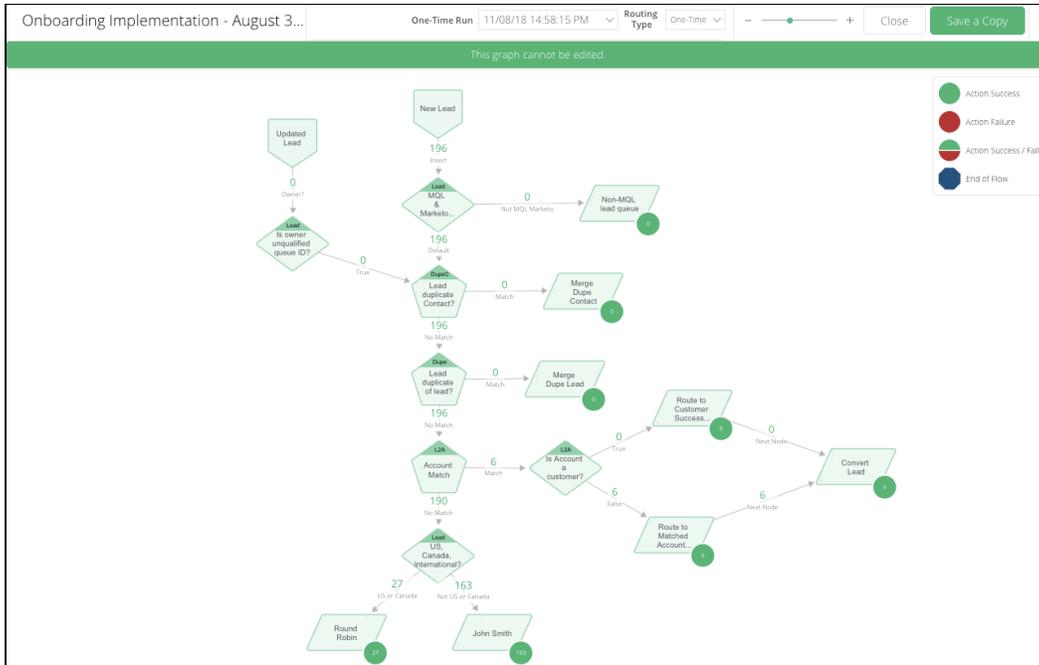


Leads Deployment History
View all previous deployments of your flows and One-Time Routing runs. Select a deployment to view Routing Insights.

Routing Type: All Hide Graphs with No Leads

	Router Workflow	Date	Pending	New	Updated	Total
1 Live	Router Graph - August 25, 2020 1:12 PM Deployed by Majid Ahmed	08/28/2020 11:16 am 19 days	0	0	1	1
2	Router Graph - August 5, 2020 3:43 PM Run by Majid Ahmed	09/16/2020 2:38 pm One-Time	0	27	0	27
3	Router Graph - August 5, 2020 3:43 PM Run by Majid Ahmed	09/16/2020 2:28 pm One-Time	0	0	0	0
4	Router Graph - August 5, 2020 3:43 PM Run by Majid Ahmed	09/15/2020 4:57 pm One-Time	0	0	0	0

To view the Routing Insights, double click on the deployment you wish to view, and you will see Routing Insights for that Scheduled Routing job.



FAQs

Q. What information do I need to upload a CSV file?

The only thing you truly need on your file is a column containing the SFDC IDs for the records you wish to route.

Q. I have a large number of records to route, can I do them all at once?

Yes you can, but if you intend to process a large file (over 75K), we recommend splitting the job into separate batches and running the batch over a weekend or during a time with lower activity. This job will occupy an apex processing slot for the duration of the job.

Q. Why can't I select my file?

The usual cause of this issue is that the file is not saved as a CSV. Please check your file format and retry.

Q. I uploaded my file but the job ran with zero records processed, what caused this?

This is usually an issue with how the IDs are appearing on the CSV file you uploaded.

- The IDs are not long enough or too long. SFDC IDs must be either 15 or 18 digits in length to be recognized.
- The IDs are not found in your SFDC instance.
- There is a footer from a SFDC export that needs to be removed from your CSV.

Q: How do you cancel a Scheduled Routing job?

After starting a One-Time Routing job you have the option to cancel the run as seen on the far right. This will abort all pending jobs that have not been processed yet.

One-Time Routing Runs							
Run Date ▾	Object ↕	Filename	User ↕	Records	Processed	Failed	Status
2020-09-16 14:38:41 PM	Lead	One Time Route - Test.csv	Majid Ahmed	44	0	0	Processing <input type="button" value="Cancel Run"/>

Best Practices

- When running a Scheduled Router job for the first time, the best practice is to run a small subset of IDs to validate that the updates are taking place as you expect
- During times where you will be processing a large file using the Scheduled Router, the recommendation is to run the job after hours or over a weekend where the job would not affect time sensitive processes in your Salesforce instance
 - If you will need to process records during normal business hours, we recommend breaking up your file into smaller batches and running them sequentially
- There are times when running a Scheduled Routing job while using Lead-to-Lead routing functionality might produce unintended routing outcomes, as all the leads from a particular company may end up getting routed to an inactive owner or queue. Please consider this when designing your Router graph. You may need to make a copy of your graph and remove this node before utilizing this graph in a Scheduled Router job.