

LeanData Routing

Hold Until & Time-to-Action Tracker Guide



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Overview

LeanData's Hold Until routing functionality extends the capabilities of Router, allowing Users to evaluate routing criteria **during** a specified time frame. Records will be held until the conditions are met or the expiration time has elapsed, whichever comes first.

Hold Until routing will help to prevent Leads from stagnating, drive accountability for reps to follow up with their Leads, or simply to incorporate customized wait steps into your routing configuration.

Example Use Cases

- Hold a record until Lead Status changes to “Working”, otherwise, exit the node after 2 hrs for reassignment to a different ADR.
- Hold a record until the Lead Status changes to “Qualified”, and when it does, route the record to an AE and notify them to engage.
- Hold a record until enrichment is complete, and once complete, continue through the process.

Configuring a Hold Until Node

You will see the Hold Until node available in the Node Bar in the node menu under the Track & Report section. Drag a Hold Until node into your active flow to begin configuring your Hold Until criteria.



Setting your Conditions

Define the conditions that you would like to trigger a record for routing. You can include as many rules as you would like. LeanData will follow the path for whichever rule is met first within the specified time frame.

Hold Until Conditions Met
Add Rules and an Expiration Time to hold records before releasing them to their target nodes.

Complementary Node Functionality: Report on Time-to-Action ?

Node Name
Hold Until - Working

Description >

Rules ?
Specify conditions for records to exit the node then select the Target for each rule.

Condition	Label	Target
❖ (Status equals Closed - Converted)	Lead Working	Send Notification

Lead Field **Operator** **Value**

1. Status equals Working - Contacted

+ New condition

Description >

Add a Rule

If you would like to set different conditions for subsequent evaluations, you can also direct records to another Hold Until node with different conditions.

Please note that a record can only be subject to one Hold Until node at any given moment.

If you do not add any conditions, a record will follow the "Time Elapsed" edge when the specified time frame has elapsed.

Setting a Time Frame

Under the Expiration Time section of the Hold Until Node, pick a time frame using the dropdowns. LeanData will check your conditions, if any, after this time frame elapses. Currently, the default is 5 minutes with a max of 180 days as the longest time frame.

Records that are not actioned upon (meeting the conditions of rules set above) prior to the expiration time will exit through the Time Expired edge.

Expiration Time 

If a rule's conditions are met before the time elapses, the record will exit through the associated edge. If time elapses, the record will follow the Time Elapsed edge.

Time Expires In Days Hours Minutes

Evaluate while Owner is working 

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Evaluate while Owner is working 

When the Evaluate while Owner is working option is selected, the Time Frame will only elapse during the current owner's Schedule (Working Hours, Vacations, and Holidays) as it is defined **at the time of record entry**. To adjust the Schedules, visit People > Users > Schedules. If a User's Schedule is changed while a record is still being held during the specified time frame, LeanData will still utilize the User's original schedule.

When this option is checked, LeanData also automatically calculates/incorporates the Owner Schedule in the Time-to-Action Tracker (see below) .

For example, if the Time Frame is 4 hours, the owner's Schedule is 9AM-5PM, and a record enters this node at 3PM on a Friday, only two of the four working hours will have elapsed by the end of the day. On Monday at 9AM, the remaining two hours will elapse and the time frame will have fully elapsed at 11AM that Monday.

Using the example above, let's say the Rep creates a vacation for Monday at 9AM on Friday at 4PM (after the record entry time). The record will utilize the Schedule as it was defined **at the time of record entry**, not the current/edited Schedule, and the record will follow the expiration edge at 11AM that Monday.

Hold Until Metrics & Logs

In addition to being able to add Hold Until decisions to your Router flow, LeanData will allow you to track records that are pending evaluation in the Routing Insights, Audit Logs, and Salesforce Reports & Dashboards.

Routing Insights

Records that have not met specified rules and are currently waiting for expiration will be indicated by a counter on the Hold Until node itself. This will detail how many records are still waiting to be qualified or expired via that Hold Until node.



Please note, the use of a Hold Until node may create a situation where a record may enter via a particular version of your Router flow, but may not be finished evaluating until a subsequent version of your Router flow. Please note that this may cause some of the metrics for records processed in a particular deployment to appear higher than the number of records that entered that deployment.

LeanData will always attempt to use the newest deployment as long as node names do not change. If node names change, LeanData will abort the hold.

Abort Reasons

In the case that any of the following occurs, LeanData will abort the hold on these records and mark the record status as “Aborted” in the Time-to-Action Tracker with an Abort Reason populated.

- Lead Converted
- Record Deleted or Merged
- Time-Based or Hold Until Conflict
- Incompatible Graph Deployment
 - Node name changes or conditions are incompatible
- Manual Abort by a User
- Business Unit Changed
 - Only applicable for Multi-Graph customers

Audit Logs

Within the Audit Logs page, records that are still pending due to a Hold Until node will display with a “Pending Route” status in the Path Column. The time at which the hold is scheduled to expire will also be displayed.

When the time frame expires or when the record qualifies for one of the rules within the Hold Until node, another log will be generated showing the routing outcome and detailing the path from the Hold Until node onward. If you expand the “More Info” section, you will see a link to the Parent Log that triggered the initial routing process.

Time-to-Action Tracker

A complementary functionality of this node is the Time-to-Action Tracker, an object that tracks each record held in the Hold Until node and various details on the Time-to-Action. You can use the object to report on SLA Compliance, Performance or Action by Team, Division, Manager, or identify bottlenecks in your process.

You can now answer questions such as:

- What is the average Time-to-Touch for each team?
- What is our organization’s overall SLA Compliance?
- What part of the process is taking the longest time to fulfill/finish?

To configure the report, please see this guide: [Routing - Time to Action Tracker Guide](#).

Fields & Definitions

The following fields are available for Reporting on the Time-to-Action Tracker:

- **Status**
 - Pending
 - Default value when the record enters the node
 - Record has reached the node and is awaiting conditions to be met or the expiration time
 - Met
 - Record’s conditions were successfully met in the specified time frame
 - Missed
 - Record’s conditions were not met in the specified time frame and the hold expired
 - Aborted
 - Tracking was aborted due to conflicts (see Abort Reasons above)
- **Entry/Start Time**
 - Date/Time LeanData completed record routing and started the hold
- **Exit Time**
 - Date/Time record qualified for exit (conditions met or expiration time)
- **Calculated Time-to-Action (in Seconds)**

- Incorporates Schedule calculations. If Schedule is off, this will match the Raw Time-to-Action
 - With “Evaluate while Owner is working” ON, logic = [CCIO Processed At Time] - [Trigger Time of Exit] - non working hours
- **Raw Time-to-Action (in seconds)**
 - End Time-Start Time
 - Does not incorporate Schedule calculations
- **Timer (in minutes)**
 - User determined expiration time
- **Evaluate while Owner is working**
- **User**
 - Lookup to User object
 - *Note - if the owner changes while the record is held, LeanData will not update this field. To release the hold when the owner changes, add a rule for “Owner has changed.”*
- **Queue/User ID**
 - ID of the owner
- **Entry Log**
 - Lookup to Entry Log
- **Node Name**
- **Exit Edge Name**
- **Primary ID**
 - ID of record routed
- **Business Unit**

FAQs

Can you schedule a Hold Until node for a specific date/time?

Currently, a Hold Until node can only schedule a time frame relative to the time a record is initially evaluated in the flow and cannot support a specific date or time. However, you can support User Schedules using the option to Evaluate while Owner is Working option.

How will this affect records that are triggered to route via an update condition?

Records can still be routed via an update condition without affecting the expiration time. If a record is held in this node, it will not prevent that record from getting routed otherwise. If you need to prevent this scenario, you will have to design your update conditions or your Hold Until criteria with this in mind.

Can a record be scheduled for two different time frames at the same time?

No. If a record that is currently held by a Hold Until node happens to re-enter the LeanData routing process and proceed to another Hold Until node, the initial hold will be canceled and the new hold will initiate. A particular record can only be subject to one Hold Until node at any given time.

If I modify a Hold Until node and deploy a new Router flow, will this affect records that were previously scheduled?

Possibly. If you either change the name of a Hold Until node or add, edit, or modify a condition using the “has changed” operator within the node, all the records held via the previous version of that node will no longer be evaluated, and no further action will be taken.

If you edit conditions other than “has changed” conditions, records will be subject to the new conditions at the time of evaluation.

If you only change the time frame in the node, records will still be subject to the original time frame before the edit.

Do Hold Until nodes account for working hours or weekends?

If you have the Evaluate while Owner is working option enabled in the Hold Until Node, the hours and minutes set in your timeframe will only elapse during the current owner’s schedule (at the time of record entry).

Will LeanData remember matches made in a Match node before a record enters the Hold Until node?

No, because many factors can change while a record is pending in a Hold Until node, a match found prior to entering the Hold Until node might no longer be the best match when the time frame has elapsed. Please add an additional match node after the Hold Until node to ensure the most up to date matched record is used.

How long will Time-to-Action records be kept in SFDC?

Time to Action records will be deleted after 180 days.

Can the Hold Until Node be used in Scheduled Routing?

Yes it can, however if a record hits the Hold Until node in scheduled routing it will stop routing as if it hit an Endpoint. If you have a Graph that uses the Hold Until Node, we recommend making a copy of the Graph without the Hold Until Node and Using that for Scheduled Routing.

Best Practices

- When utilizing the Updated entry node, please note that records that are currently awaiting action in a Hold Until node will still be evaluated. You may want to ensure that your Updated entry node conditions exclude records that would otherwise be affected by a previously scheduled Hold Until action, or ensure that your Hold Until node excludes criteria that might satisfy an Updated condition.
- If you have utilized a Match node prior to entering a Hold Until node, LeanData will not retain the found match when the record is re-processed after the time frame. If you wish to reference a matched record, you will have to direct records through a Match node again after they exit the Hold Until node.