LeanData Routing

Capping Guide

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Overview

The LeanData People section allows Router customers to manage User Capping. This allows you to account for differences in Users' capacity without having to modify your FlowBuilder graph or Round Robin Pools.

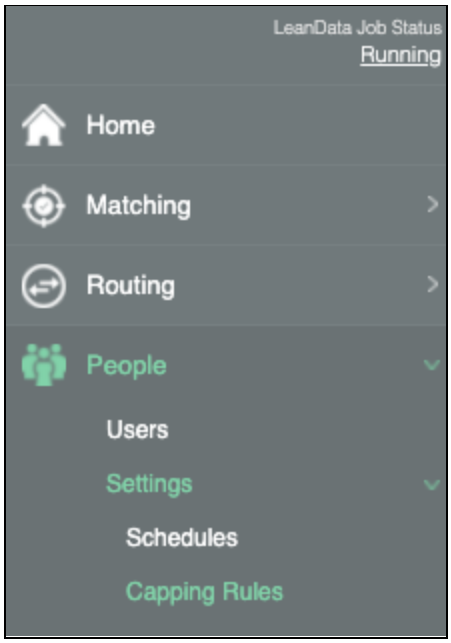
Setting Up Conditional Capping Rules

Capping Rules will allow you to define rules to control how many records that meet a certain set of criteria a specific user can own. This will influence Round Robin assignment in the case that a Round Robin Pool member has already reached their capacity. For example you may want a team of Account Executives to own no more than 50 Target Accounts at any given time. This feature will allow you to skip them in a Round Robin distribution if they have reached that limit.

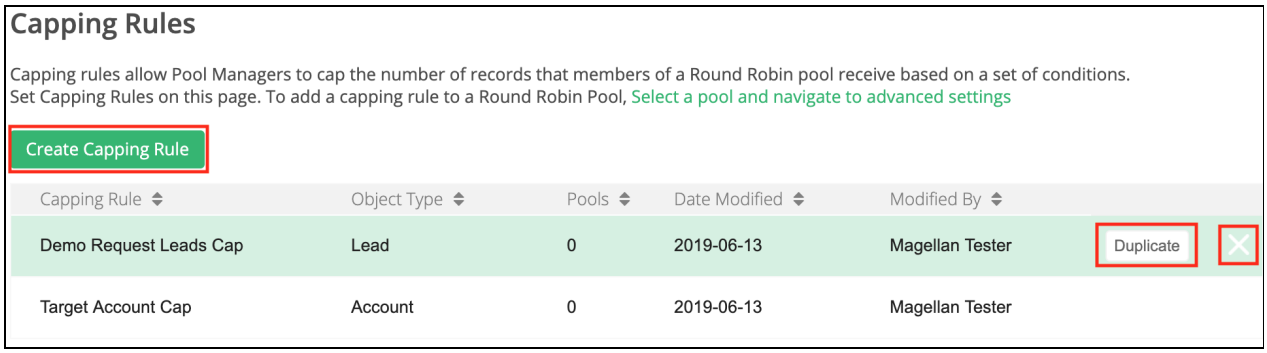
Please Note: If you would like to set up Time-Based Capping rules, you can do so within the Round Robin Pool section of the LeanData Dashboard. The instructions for this appear at the end of this guide.

Creating Conditional Capping Rules

To set up Capping Rules, navigate to ***People*** → ***Settings*** → ***Capping Rules***.

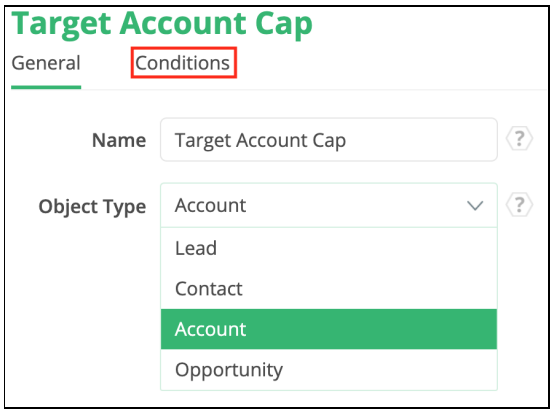


This will take you to a page where you will see all your existing Capping Rules, and allow you to create new rules.

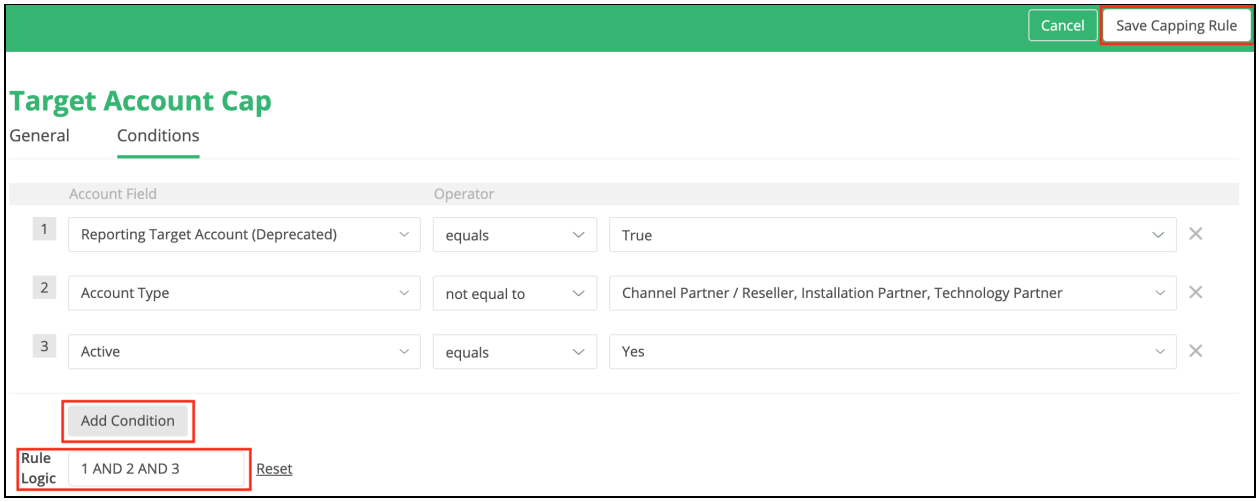


Clicking on a row will open the editor for that rule. You can also hover over the row, and you will see options to Duplicate or Delete the rule on the far right.

Click the **Create Capping Rule** button to create a new rule. You will be taken to a page where you can name that rule and select which Object it will apply to.



When you are finished, click the **Conditions** tab at the top to define the conditions for this Capping Rule.

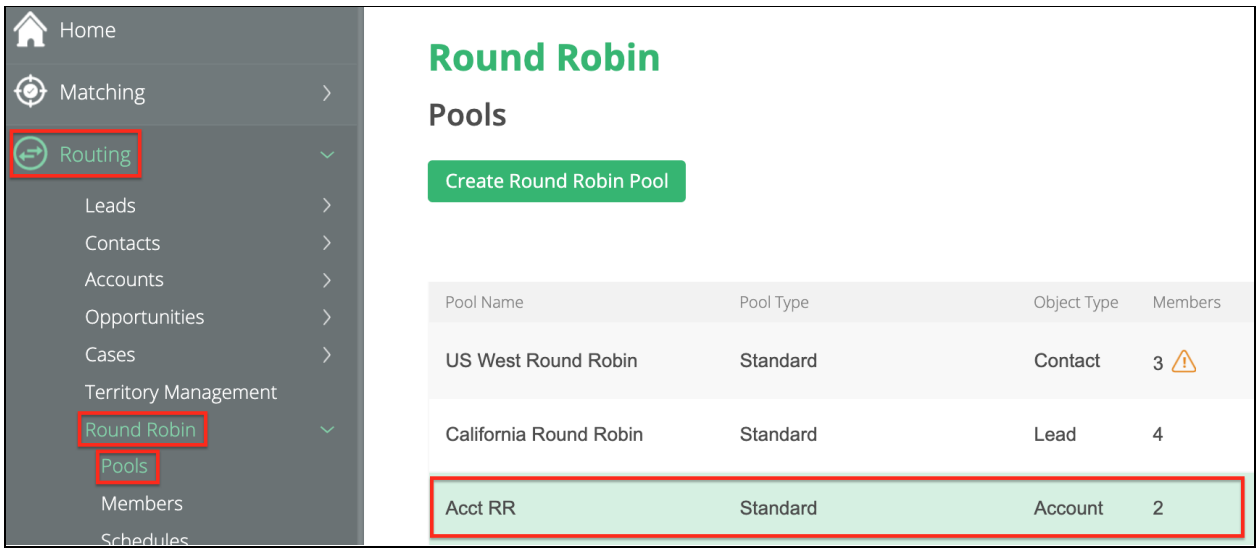


On this page you can define your conditions using rule logic. You can add as many different conditions as you wish, and combine them with AND / OR statements. When finished, click the **Save Capping Rule** button in the upper right.

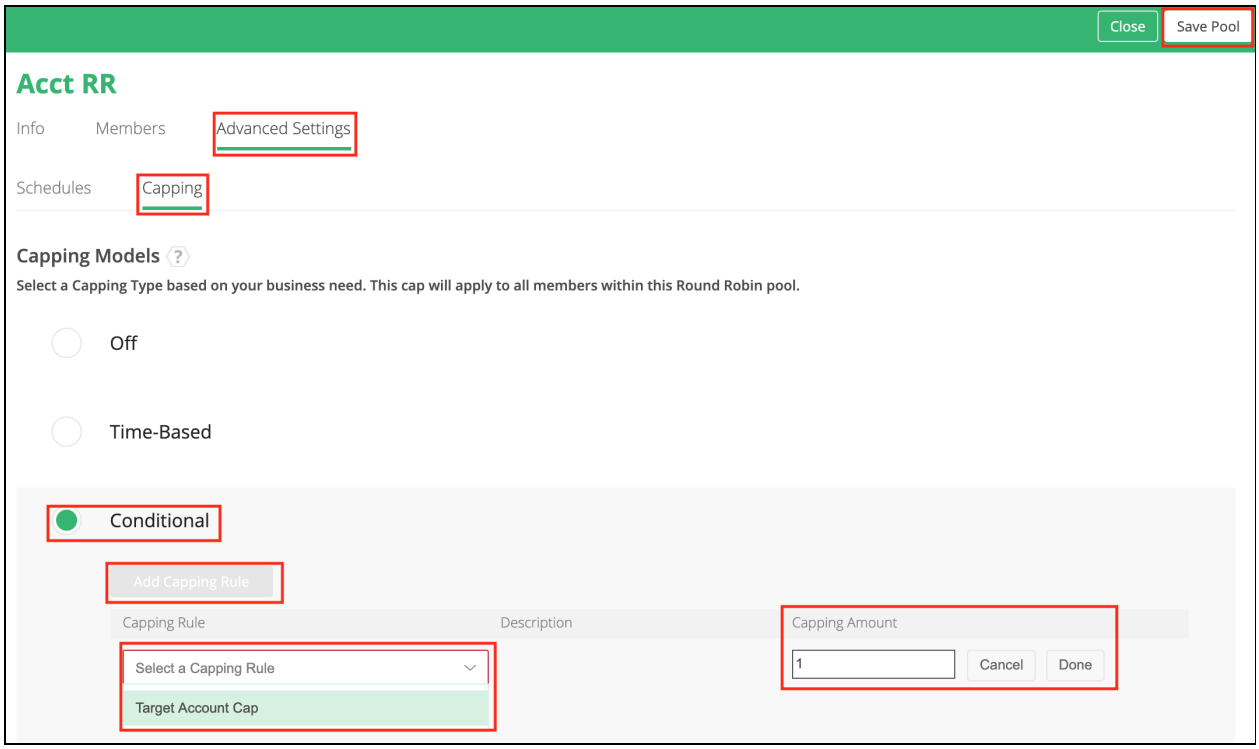
Applying Conditional Capping Rules to a Round Robin Pool

To apply a Capping Rule, you will have to navigate to the Round Robin Pool where you would like to apply that rule. ***Routing*** → ***Round Robin*** → ***Pools***. Then select the Pool to which you want to apply your Capping Rule.

Note: You can only apply Conditional Capping Rules to Standard Lead, Contact, Account, Opportunity and Case Round Robin Pools. Live Routing Pools are ineligible.



On the next page, select **Advanced Settings**, then **Capping**, then click the **Conditional** option.



Click the **Add Capping Rule** button, then select the Capping Rule you want in the drop down. In the **Capping Amount** section to the right, set the amount of records you would like to set as the limit for the members in this pool.

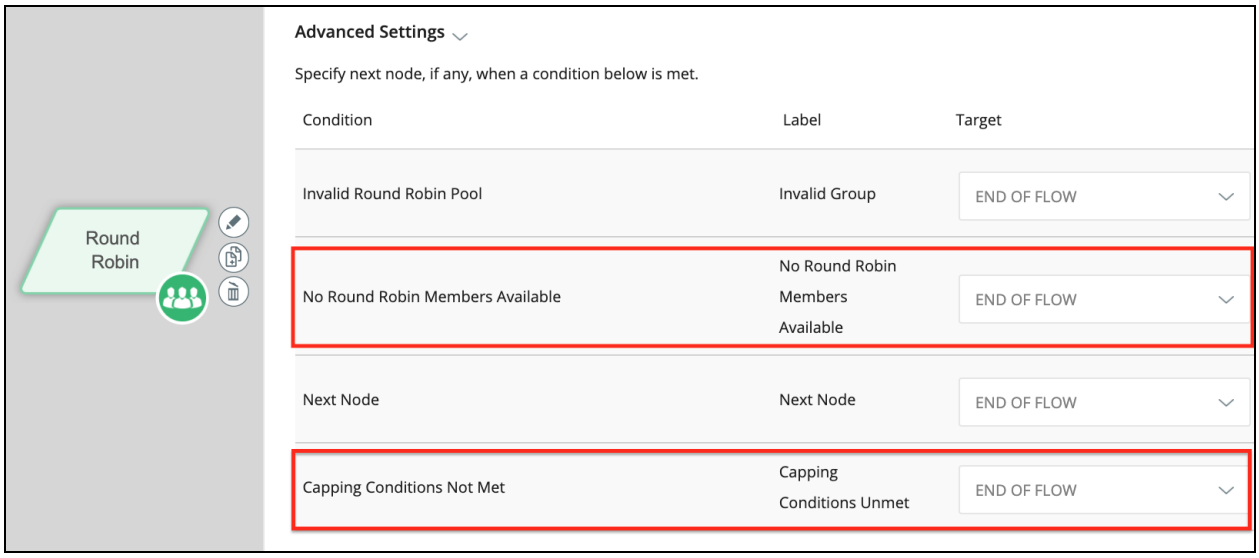
Click **Save Pool** in the upper right when you are done.

FlowBuilder Considerations

The Round Robin nodes will have a few edges under Advanced Settings for what to do if all pool members have met their Capping limit or if records enter that node that do not meet the Capping Conditions assigned to that pool,

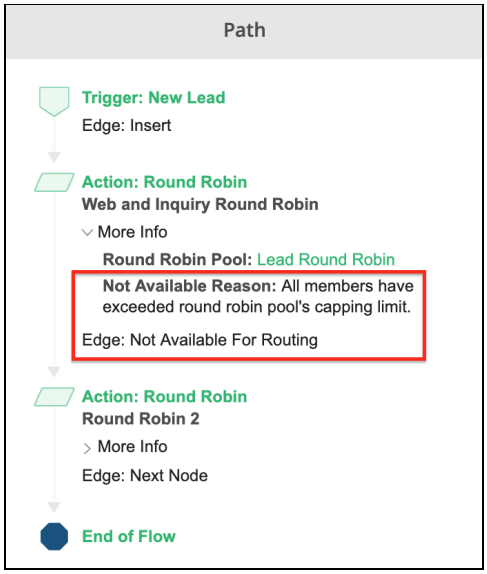
If there are no Round Robin members available due to all members having reached the cap threshold, the **No Round Robin Members Available** edge will determine the next action LeanData will follow.

If records enter this Round Robin node and do not meet the Capping Conditions assigned to it, the **Capping Conditions Not Met** edge will determine the next action LeanData will follow.



Audit Logs

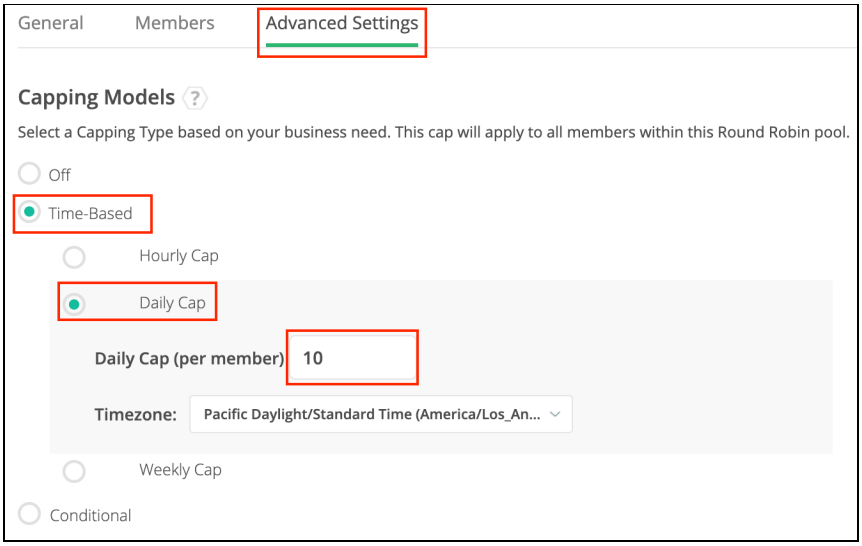
If a record is directed to a Round Robin Pool where every member has met their cap or if the record does not meet the capping conditions that have been applied to that pool, the Audit logs record will show that the record followed one of these fallback edges.



Time-Based Capping

With Time-Based Capping, you can set Hourly, Daily, and Weekly caps as you desire. This will cap the number of records a User can receive within the specified time frame.

Within a Round Robin Pool, Navigate to ***Advanced Settings*** → ***Capping***, and then select the **Time-Based** option under **Capping Models**.



Select the time frame that you would like to use, and then enter the amount of records a User should receive within that time frame.

Once a User reaches the specified cap within this particular Round Robin Pool, they will be skipped in the distribution of this Pool until the time frame elapses. When the time frame elapses, all Users will be reset to zero and can receive records again.