

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.

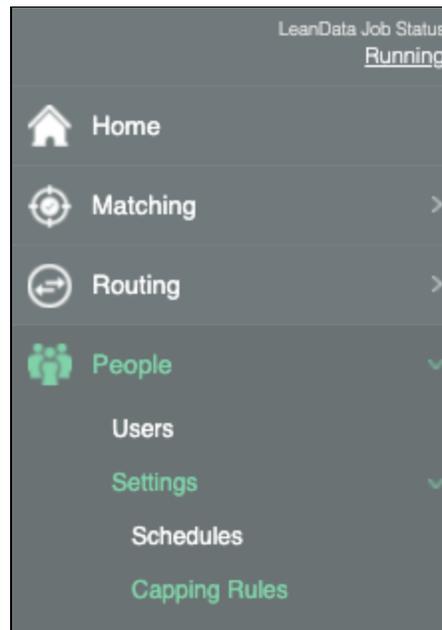
Setting Up Conditional Capping Rules

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.

Capping Rules

Capping rules allow Pool Managers to cap the number of records that members of a Round Robin pool receive based on a set of conditions. Set Capping Rules on this page. To add a capping rule to a Round Robin Pool, [Select a pool and navigate to advanced settings](#)

Create Capping Rule

Capping Rule	Object Type	Pools	Date Modified	Modified By	
Demo Request Leads Cap	Lead	0	2019-06-13	Magellan Tester	Duplicate X
Target Account Cap	Account	0	2019-06-13	Magellan Tester	

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.

Target Account Cap

General **Conditions**

Name ?

Object Type ?

- Account
- Lead
- Contact
- Account**
- Opportunity

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

Cancel Save Capping Rule

Target Account Cap

General Conditions

	Account Field	Operator	Value	
1	Reporting Target Account (Deprecated)	equals	True	×
2	Account Type	not equal to	Channel Partner / Reseller, Installation Partner, Technology Partner	×
3	Active	equals	Yes	×

Add Condition

Rule Logic: 1 AND 2 AND 3 Reset

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.

- Home
- Matching
- Routing
- Leads
- Contacts
- Accounts
- Opportunities
- Cases
- Territory Management
- Round Robin
- Pools
- Members
- Schedules

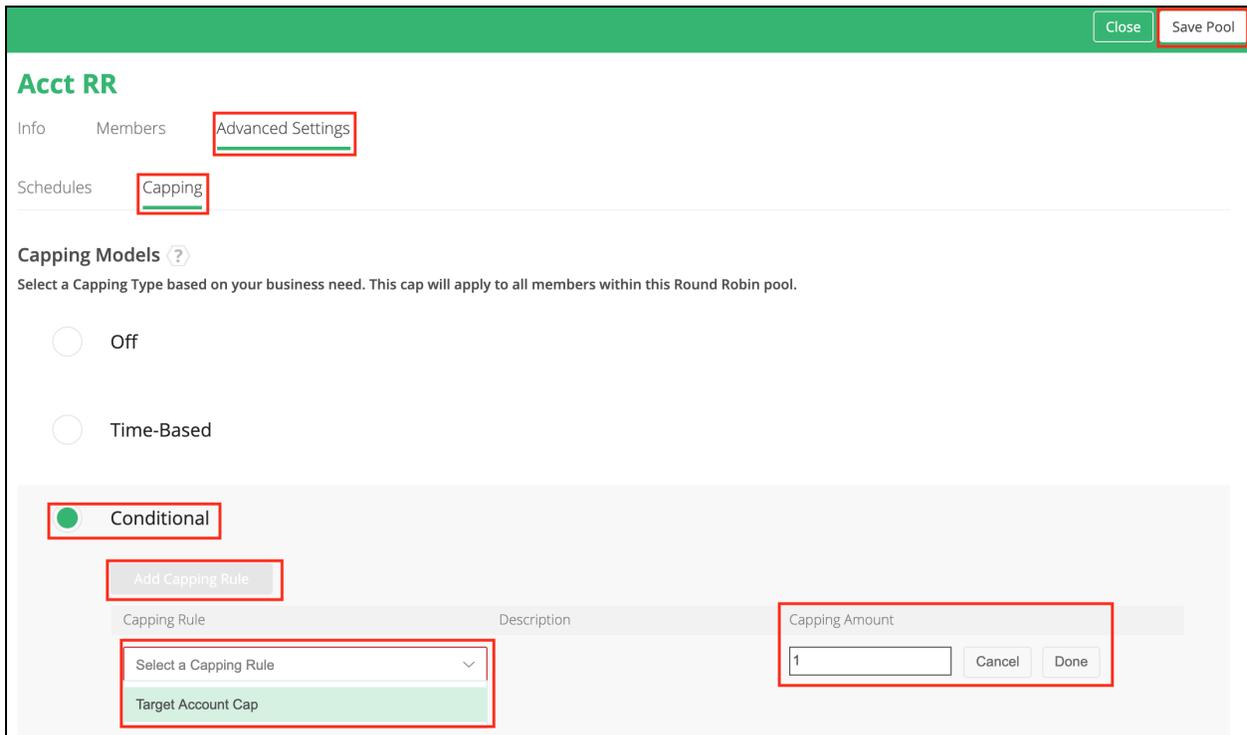
Round Robin

Pools

Create Round Robin Pool

Pool Name	Pool Type	Object Type	Members
US West Round Robin	Standard	Contact	3 ⚠
California Round Robin	Standard	Lead	4
Acct RR	Standard	Account	2

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.

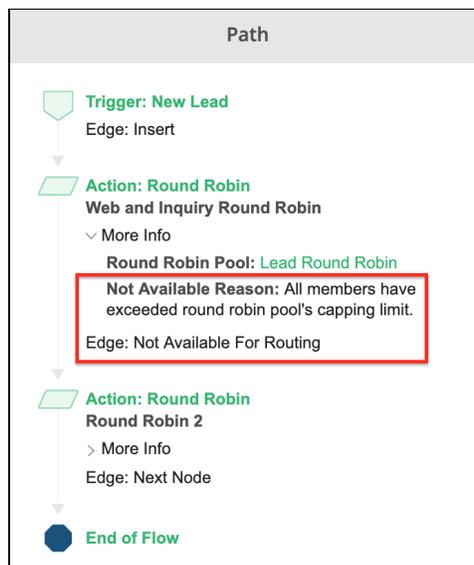
Advanced Settings ▾

Specify next node, if any, when a condition below is met.

Condition	Label	Target
Invalid Round Robin Pool	Invalid Group	END OF FLOW ▾
No Round Robin Members Available	No Round Robin Members Available	END OF FLOW ▾
Next Node	Next Node	END OF FLOW ▾
Capping Conditions Not Met	Capping Conditions Unmet	END OF FLOW ▾

Audit Logs

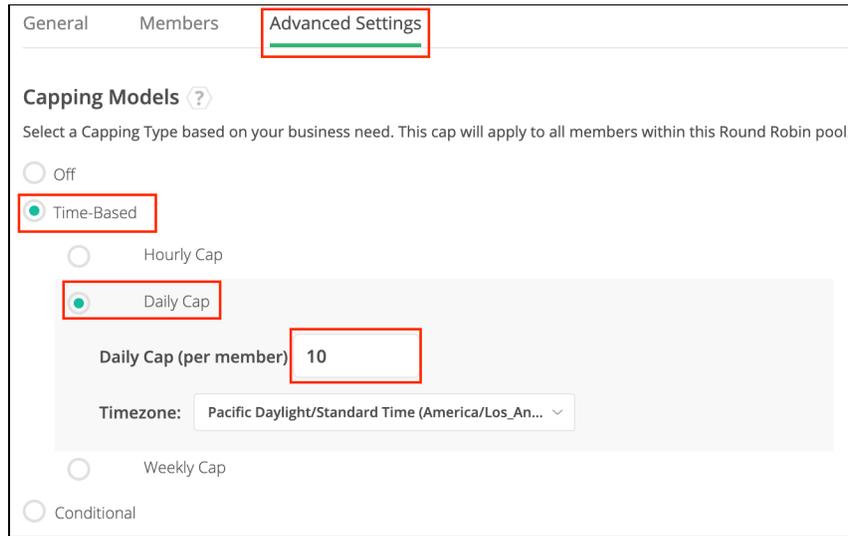
If a record is directed to a Round Robin Pool where every member has met their cap or if the record does not meet the capping conditions that have been applied to that pool, the Audit logs record will show that the record followed one of these fallback edges.



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**.



The screenshot shows the 'Advanced Settings' tab selected. Under 'Capping Models', the 'Time-Based' radio button is selected. Below it, the 'Daily Cap' radio button is selected, and the 'Daily Cap (per member)' is set to 10. The 'Timezone' is set to 'Pacific Daylight/Standard Time (America/Los_An...)'.

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.