LeanData Admin

Standard Security Setup Guide

Overview

The following guide covers functionality available within the Admin section of the LeanData dashboard as well as other helpful topics which your organization's LeanData Admin should know. This document includes guidance on setting up an Integration User, kicking off and monitoring LeanData's scheduled job, ensuring that your users have the right permissions and visibility and granting access to LeanData Support, should the need arise.

Definitions

General definitions of various terms used.

- **LeanData Admin**
  - The individual who will be administering LeanData. Commonly your organization's Salesforce Admin or another user who will be taking charge of your organization's LeanData setup.
- **Integration User**
  - The Salesforce user account which LeanData will operate under. All of LeanData's actions will be logged under this user.

Setting up a LeanData Integration User

For your LeanData launch, your organization will need decide which Salesforce user will serve as the Integration User for LeanData. Because all of LeanData's actions will get logged under this user, it's best to create a unique Salesforce user specifically for this purpose. This way you will know what actions were performed by LeanData vs. other automation or users, which makes troubleshooting a lot easier. If a creating a separate LeanData Integration User is not possible, you can designate an existing user as long as they have the right Salesforce permissions.

LeanData Integration User Salesforce Permissions

Ideally, the profile used is System Admin or another profile which has Modify All permission. If that is not possible, then the following are the minimal set of permissions needed (green is recommended, red is required)

Administrative Permissions

- API Enabled
  - Ensures that your LeanData team has the ability to sync LeanData-related settings to your org and has visibility for troubleshooting.

- Assign Permission Sets
  - Required to assign LeanData permissions to Users
- Manage Custom Permissions
  - Custom permissions let you define access checks that can be assigned to Users via permission sets or profiles. Allows for more robust troubleshooting for LeanData regarding other custom processes & apps that may require custom permissions.
- Manage Custom Report Types
  - Allows customizing, editing, and deleting custom reports.
- Manage Package Licenses
  - You can assign each license to a user within your organization
- Manage Users (nice to have)
  - Needed to have LeanData as an option for remote access.
- View All Data (nice to have for debugging purposes, if needed)
  - Managing all data in an organization; for example, data cleansing, deduplication, mass deletion, mass transferring, and managing record approvals. Nice to have for debugging purposes, if needed.
- Accounts (read, create, edit, view all)
  - Needed to access this object (read, create, edit, and delete Account records).
- Leads (read, edit, delete, view all)
  - Needed to access this object (read, create, edit, and delete Lead records).
- Contacts (read, create, edit, view all)
  - Needed to access this object (read, create, edit, and delete Contact records).
- Opportunities (read, create, edit, view all)
  - Needed to access this object (read, create, edit, and delete Opportunity records).
- Task (read, create, edit, view all)
  - Needed to access this object (read, create, edit, and delete Task records).
- View All Users
  - Needed to be able to reference & view a list of users for our various User dropdown menus (record assignments, configurations, etc.)
- Customize Application (nice to have for debugging purposes, if needed)
  - Enables certain native SFDC capabilities. Nice to have for debugging purposes.
- View Setup and Configuration
  - Can view setup pages (object details, page layouts, etc.) & monitor setup changes. Allows for more robust troubleshooting.

General User Permissions

- Convert Leads
  - Needed to be able to convert leads in LeanData Routing
- Create and Customize Reports
  - Allows for Creating Native SFDC reports

- Manage Leads
  - Required in order to change/update lead ownership & lead field values.
- Report Builder
  - Enables Salesforce's drag and drop report creation interface.
- Run Reports
  - Basic permission to run reports and receive the full report data.

LeanData Permission Sets
- LeanData Custom Objects Full Access
  - See [LeanData Permission Sets](#) below for more details
- LeanData Marketing Touch Permission Set (if you're using Attribution)
  - See [LeanData Permission Sets](#) below for more details

Authorizing API Access for LeanData

If you are planning on operating with a Standard LeanData Security configuration, you must authorize a Token. Authorizing a token is quick and easy, and ensures that your LeanData team has the ability to sync LeanData-related settings to your org and has visibility for troubleshooting.

To Authorize a Token

1. Log fully out of Salesforce
2. Log in as the Integration User you've designated for LeanData
3. Go to your Salesforce Tabs and search for LeanData
4. Once in the tab, you will see an "Authorize Salesforce Token" button on the home screen (If you don't see "Authorize Salesforce Token", click on "Show Authorization")
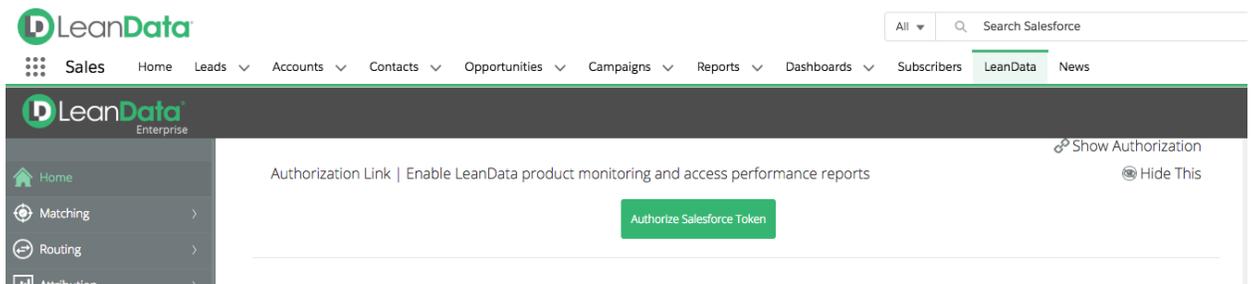

5. Click to Authorize the token and follow the prompts to do so

LeanData Tab Visibility

The majority of LeanData's functionality can be accessed from a Salesforce tab called "LeanData." Granting visibility to this tab on a Profile level is an important step which should be done for any Profiles that you would need to have visibility of the LeanData tools at their disposal. Similarly, if there are any users who you do not want to have visibility of the LeanData tab, you can limit this on the Profile level. Visibility should be given upon your LeanData launch and should also be added on for new Profiles, if they need LeanData access.
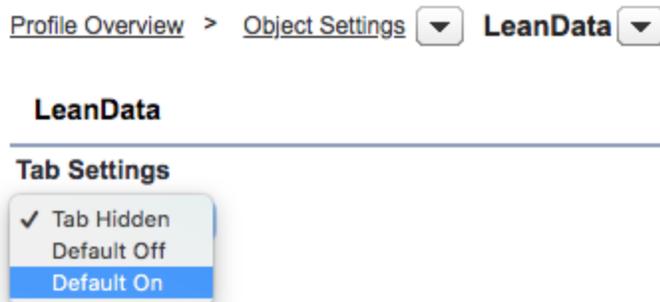
To Grant LeanData Tab Visibility

1. In Setup, click into Users, then into Profiles

2.
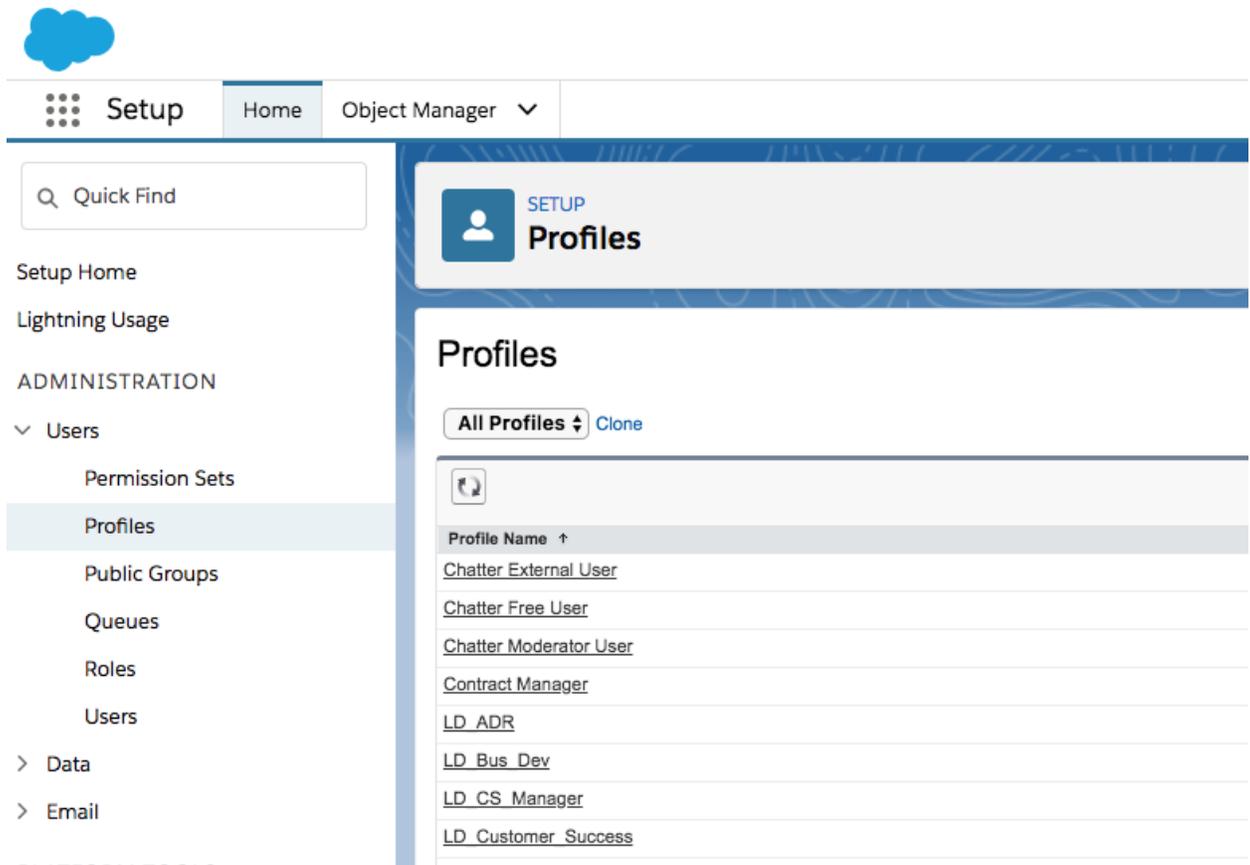
3. Click on the Profile you would like to give LeanData Tab visibility
4. In the Find Settings search box, type in LeanData
5. When search results come up, click on LeanData under the Object Settings
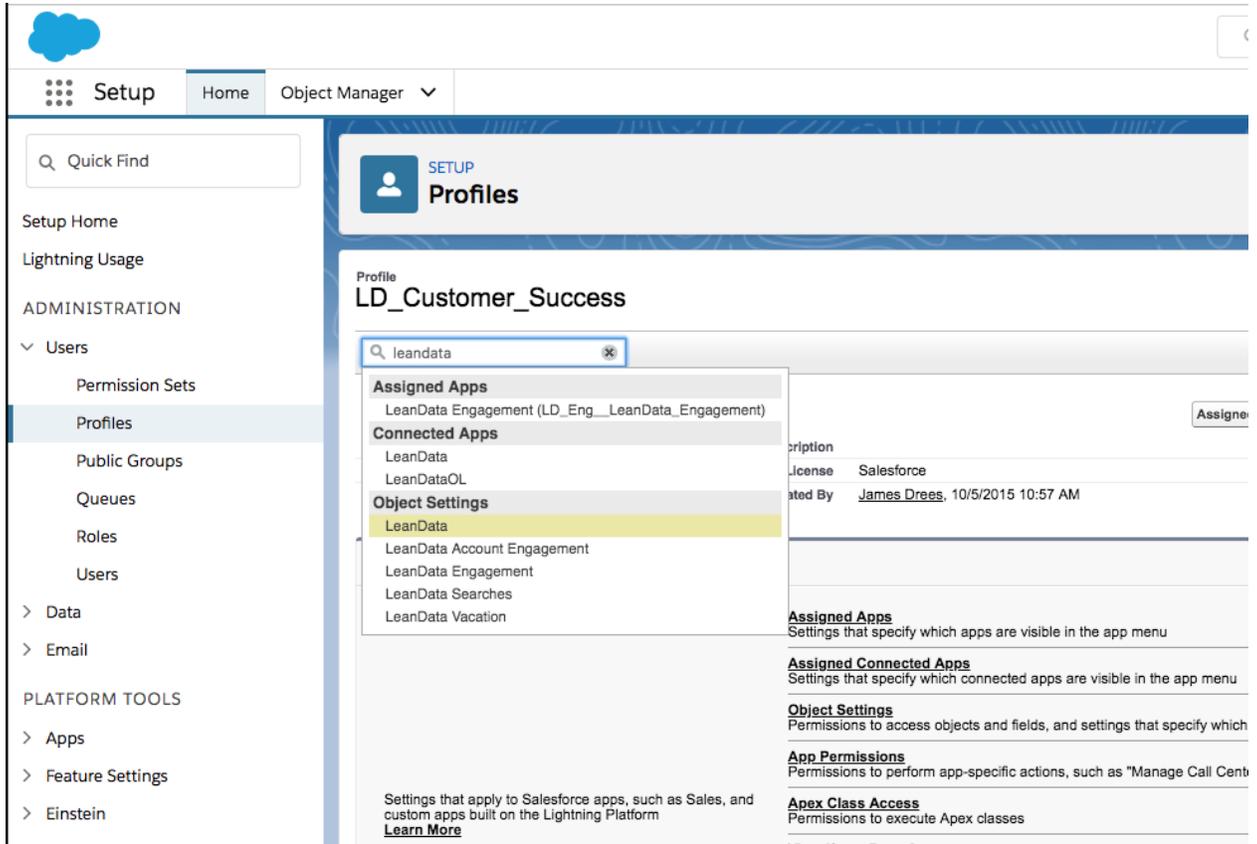
6. Click Edit and switch the tab setting to "Default On", the Save

LeanData Permission Sets

Custom LeanData permission sets need to be assigned in order for users to be able to view, access and modify settings in LeanData. These should be given upon your LeanData launch and should also be added on for new users, if they need LeanData access.

**LeanData Dashboard Access**

- A restrictive permission set that limits a User to only viewing select pages on the LeanData Dashboard. This is ideal for Users requiring minimal involvement.
- Unless they have additional permissions, Users who have this permission set will only be able to access some basic troubleshooting tools in Leandata such as Tagging Preview and Audit Logs.
- Users with this permission set who are also in a Round Robin Pool will only be able to access their own User, to view their schedule or modify their own Vacation settings.
- Users who have this permission set and are also listed as a Pool Manager for one or more Round Robin pools will additionally be able to access the pools they manage, add and remove Users from those pools, or set the schedules for Users in those pools.

LeanData Read Only with Routing Insights

- This permission set will give intermediate access to summary level information. In addition to Tagging Preview and Audit Logs, Users with this permission set will also gain access to List Analyzer and Deployment History & Routing Insights. This is ideal for providing management high level information without providing ability to configure the operation of LeanData.
- Users with this permission set who are also in a Round Robin Pool will be able to access the features mentioned above, but will only be able to access their own User under the People section of the Dashboard. They may also view their own schedule or modify their own Vacation settings.
- Users who have this permission set and are also listed as a Pool Manager for one or more Round Robin pools will be able access the pools they manage, add and remove Users from those pools, or set the schedules for Users in those pools.

LeanData Custom Objects Full Access

- This permission set will give full administrative access to all purchased components of LeanData. This includes all troubleshooting tools as well as the ability to access, edit, and Deploy Flowbuilder Graphs. This is ideal for those who need to update and configure the operation of LeanData.

- Users with this permission set will be able to access all Users, their schedules, and their vacations, and modify all Round Robin pools, regardless of whether they are listed as a Pool Manager.
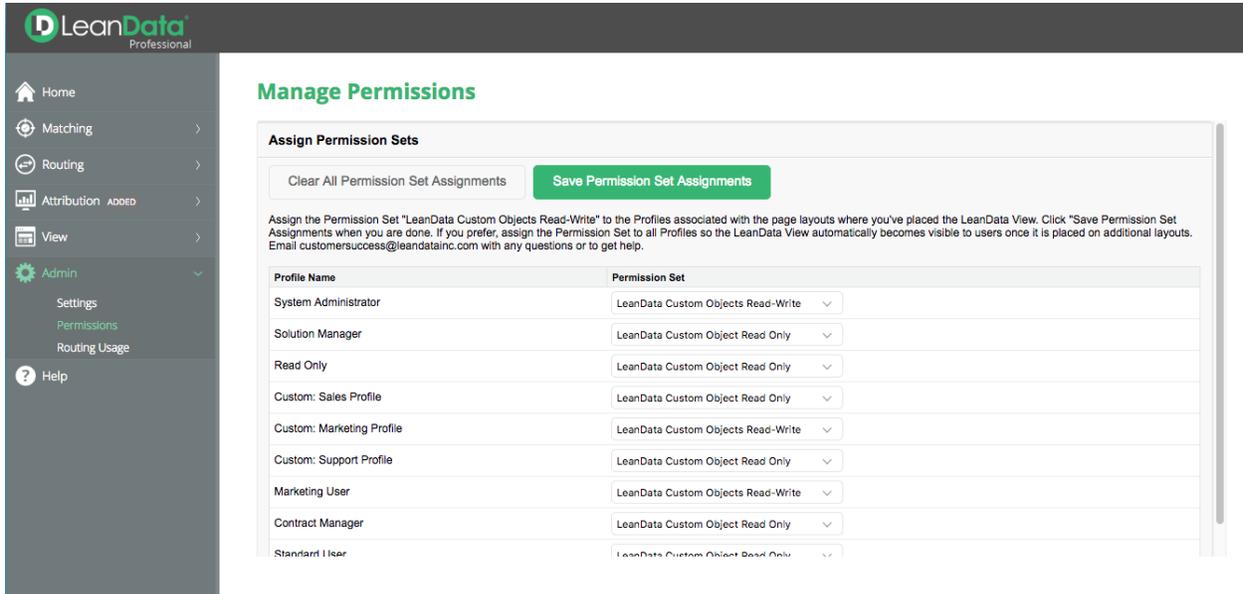
Deprecated Permission Sets

You may also see several deprecated LeanData permission sets: LeanData Custom Objects Read-Only and LeanData Custom Objects Read-Write. If you are using these deprecated permission sets, they will continue to operate as they have been operating. No functionality has been removed from them, but we have added more granular functionality to the newer permission sets outlined above and encourage our Users to use the updated versions instead.

LeanData Marketing Touch Permission Set

- Gives visibility to all LeanData Attribution features
- Allows editing of Leandata Attribution settings
- Does not come with LeanData package download, needs to be created. To create this permission set and assign it to users:
    1. Go into the LeanData Tab, then Attribution, the General Settings
    2. You will see "Add Marketing Touch Permission Set". Click on this:

    3. Once you've clicked, this will change to:

Permissions

✏️ Edit LeanData Marketing Touch Permission Set Assignments

4. Click this Edit link to add the Marketing Touch Permission set to the relevant users
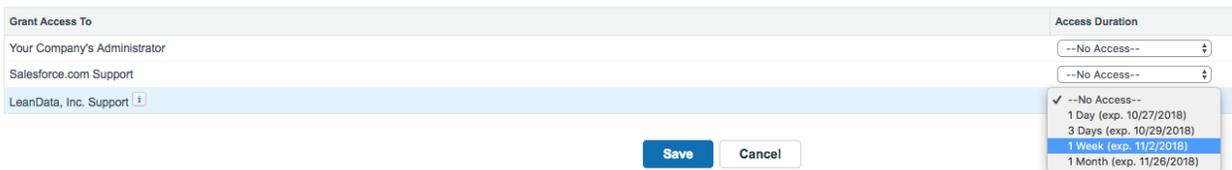
Granting Login Access for LeanData Support

You may occasionally find yourself having difficulty troubleshooting a LeanData-related issue. When this happens, you can grant temporary login access to Leandata Support to help investigate. Since LeanData is a Salesforce app, this is done the same way that you grant access to Salesforce Support.

Steps to Provide Login Access (Lightning)

1. Click on your avatar in the top right-hand side of the screen and choose "Settings"
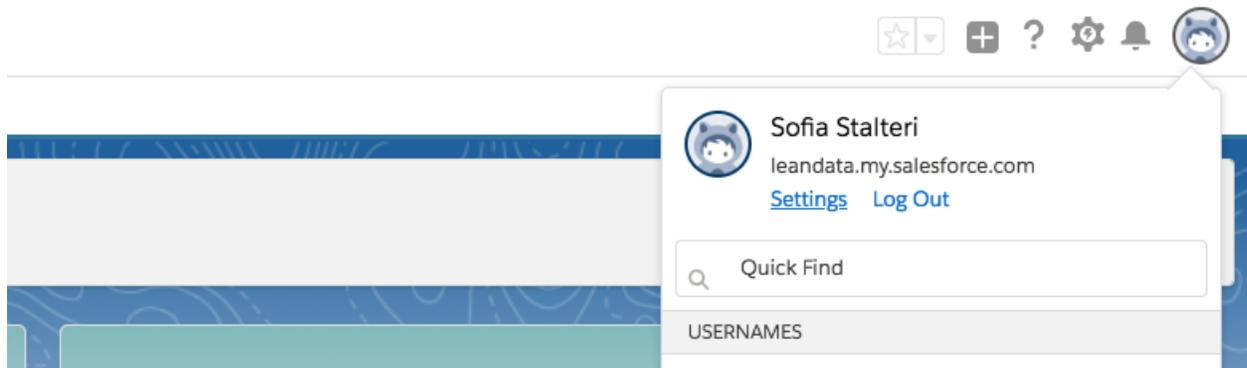
2. Click on Grant Account Login Access
3. Set the access expiration date for LeanData Support
4. Click Save

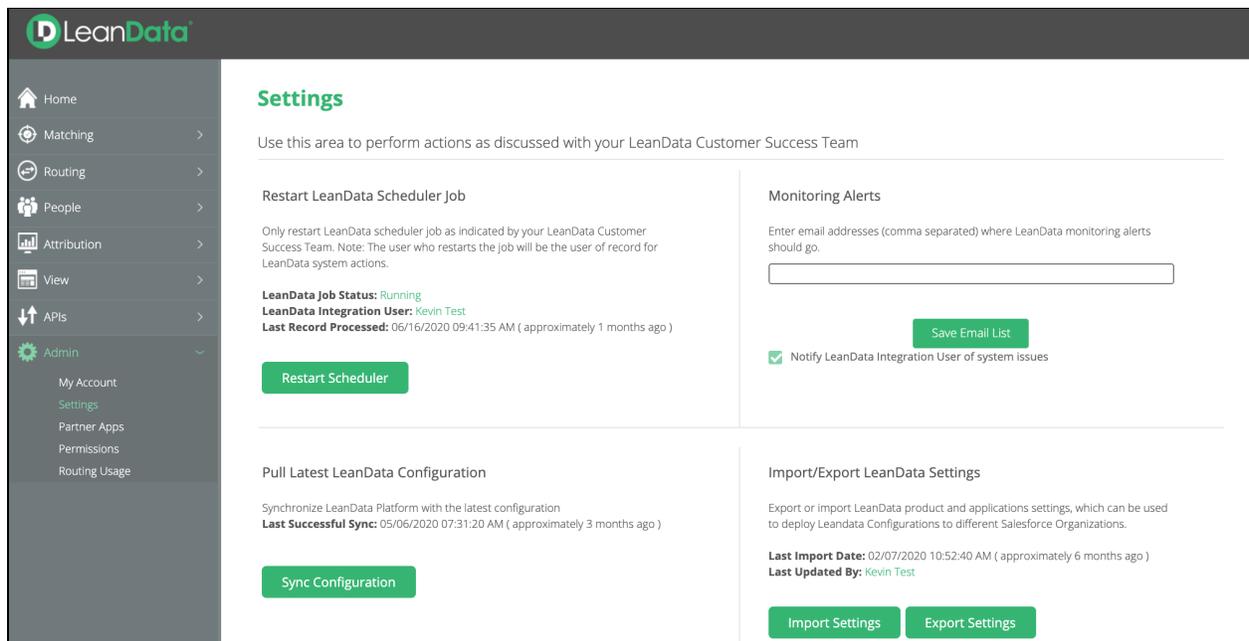**Steps to Provide Login Access (Classic)**

1. Go to Your Name
2. Go to Setup
3. Go to My Personal Information
4. Grant Login Access
5. Give access to the external app provider (LeanData) and specify number of days. In this case, it would be LeanData Support. (Screenshot below shows Salesforce.)

LeanData Tab - Admin Features

You will have several features at your disposal within the LeanData tab to help admin LeanData. To access these, please go into the LeanData tab and click on Admin. Under Admin, you will see a few sections: My Account, Settings, Partner Apps, Permissions and Routing Usage. We will cover Settings, Permissions, and Routing Usage here.

Settings

The Settings section has key features when it comes to deploying LeanData in a new environment

Restart LeanData Scheduler

Starts the LeanData Scheduler job, which is responsible for firing off the ContinuousCleanBatch, an Apex Batch job that queries to find the inserts and updates waiting to be processed for Routing and Matching. Turning on the LeanData Scheduler ensures that LeanData Matching and routing is "On" continuously.

The Scheduler should be kicked off when you are ready to deploy LeanData in a new Salesforce instance. Prior to deploying the Scheduler, it's important to ensure that your LeanData settings and flows are all finalized and in place. The Scheduler should be deployed by the Integration User to ensure that all LeanData activity gets logged under that user. The LeanData Scheduler Job can be started by hitting "Restart Scheduler". Once the Scheduler is kicked off, the LeanData Job Status should change to "Running" (commonly the Status will start as "Running - Delayed" due to other processing happening in your system, then change to "Running" once that backlog is cleared)

Monitoring Alerts

Allows you to designate who in your organization should receive monitoring alerts regarding LeanData operations. By default, the integration user will receive these alerts if the box is checked. Additionally, you can add the email addresses for anyone whom you would like to receive alerts in the entry box

Pull Latest LeanData Configuration

Synchronizes your LeanData settings with the latest configuration that's in place in LeanData's back-end system. Without this feature being used, settings sync automatically on an hourly basis, or can be synced over on-demand by your LeanData CSM. Use of this feature should not be frequent and your LeanData point of contact will be able to let you know if you need to use this feature.
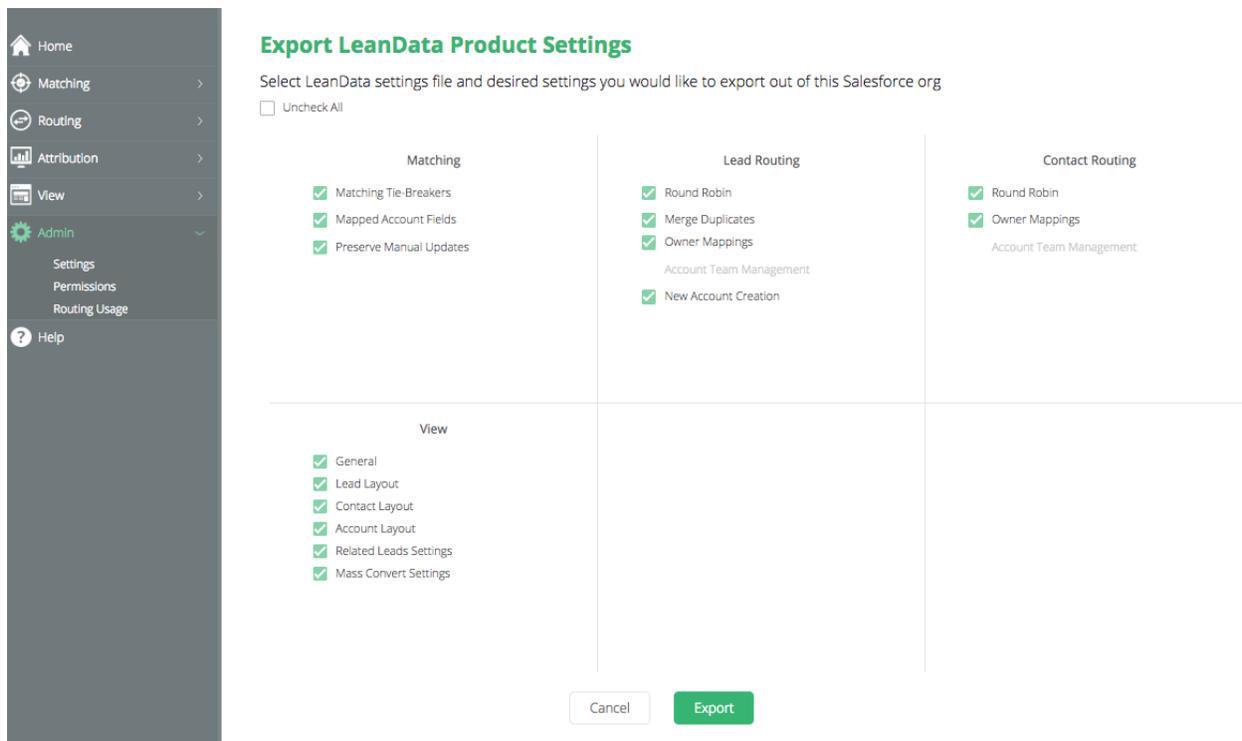
Import/Export LeanData Settings

To move LeanData into a new Salesforce org, you will first need to download the LeanData app, authorize a Token (please see instructions above) and contact your LeanData point of contact to enable your products in the new instance.

Once the above steps have been completed in your new org, the Import/Export feature allows you to move certain parts of your LeanData setup from one Salesforce Org to the new org. A common example would be moving your Round Robin Groups from Sandbox over to Production.

*Please note that in order to move items which reference specific fields or owners, you will only be able to do so if the destination org has the same users and fields, as identified by User ID and API name.

To Export Settings:

1. Go to The LeanData Tab in the org with your desired settings
2. Click on Admin
3. Click on Settings
4. Under Import/Export LeanData Settings, click on Export
5. On the next screen, select the items you'd like to Export and click Export
6. A file will be generated, save this in a location you can later access.

To Import Settings:

1. Go to The LeanData Tab in the destination org
2. Click on Admin
3. Click on Settings
4. Under Import/Export LeanData Settings, click on Import
5. Select the previously saved file

To Import Your LeanData Flow:

In order to full deploy in a new org, you will also need to import your Routing flows. To do so, go to Routing, then select the object for the router you'd like to move (Leads, Accounts, etc). Next go to FlowBuilder. In FlowBuilder section, single-click on the flow you'd like to export and hit the

icon to download the flow. In the destination org, go to the desired FlowBuilder section and click on "Import Flow" in the top right of the screen. Upload the saved file to import your flow.

Once Settings and Flows are correctly moved over to the destination org. You can deploy your

flow by single-clicking on it and hitting the   icon to deploy. As a last step, to turn on continuous Routing and Matching in the new org, you can follow the instructions in the "Restart LeanData Scheduler" section of this document.

Check User Permissions

This feature allows you to check your LeanData integration user permission level and is mainly used for troubleshooting. Use of this feature should not be frequent and your LeanData point of contact will be able to let you know if you need to use this.

Permissions

This section allows you to grant custom LeanData permission sets to users at the Profile level. These LeanData permission sets need to be assigned in order for users to be able to view, access and modify settings in LeanData. These should be given upon your LeanData launch and should also be added on for new users if they need LeanData access.

LeanData Custom Object Read Only

- Gives visibility to certain LeanData features, such as the LeanData View, Tagging Finder and Audit Logs within the LeanData Tab
- Cannot edit LeanData settings
- Cannot customize View columns
- Targeted to non-admin users who need visibility to LeanData (AEs, SDRs, etc)
- Comes standard with the LeanData package download. To assign this permission set to users:
    1. Go into the LeanData tab, then go to Admin, then Permissions
    2. Here, you can assign the LeanData Custom Object Read Only and Read Write permission sets by user Profile (screenshot below)

LeanData Custom Object Read Write or LeanData Custom Objects Full Access

- Gives visibility to all LeanData features

- Allows editing of all LeanData settings, including View columns, routing configuration, Round Robin, etc
- Comes standard with the LeanData package download. To assign this permission set to users:
    1. Go into the LeanData tab, then go to Admin, then Permissions
    2. Here, you can assign the LeanData Custom Object Read Only and Read Write permission sets by user Profile. Here is a screenshot:
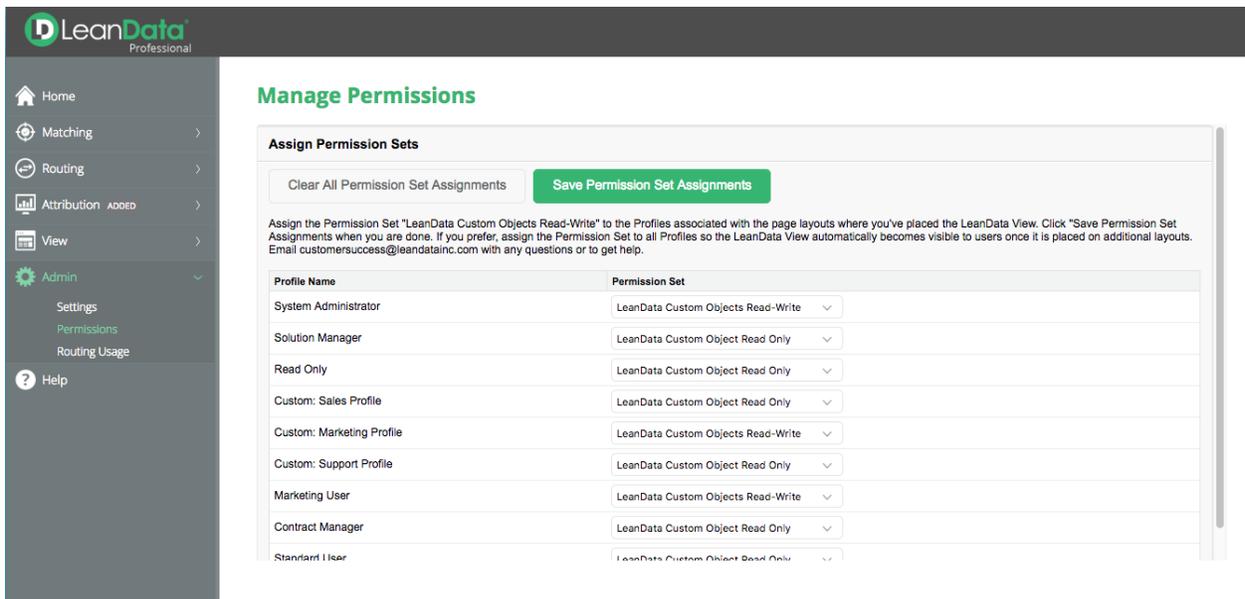
Routing Usage

This section allows you to see how many users you're routing to and pull stats based on timeframe, objects routed, etc.

FAQs

Who should be my organization's LeanData Admin?

This will vary from company to company and depends on your organization's IT rules and procedures. Ideally, the LeanData Admin would be the user or users who are in charge of making decisions about your Matching, Routing, or Attribution settings. In some cases, it could be your SFDC Admin.

Best Practices

LeanData Integration User - Because all of LeanData's actions will get logged under this user, it's best to create a unique Salesforce user specifically for this purpose. This way you will know what actions were performed by LeanData vs. other automation or user, which makes troubleshooting a lot easier.

Permission Sets - Assign LeanData Custom Objects Read-Write or LeanData Custom Objects Full Access permissions only to the users who will be involved in changing LeanData settings editing your routing flows. For other users, LeanData Custom Objects Read Only will be sufficient and will ensure that unauthorized users are not able to make changes.

Support Login Access - Occasionally you may need assistance from LeanData Support for some troubleshooting. In these cases, you can submit a ticket to LeanData Support. If your organization's rules permit, it is always a great idea to also grant temporary support access to the support team, so they can investigate.