

LeanData Admin

Permission Sets Guide



Overview	3
LeanData Permission Sets	3
LeanData View	3
LeanData Dashboard Access	3
LeanData Read Only with Routing Insights	4
LeanData Custom Object Full Access	4
Deprecated Permission Sets	4
LeanData Marketing Touch Permission Set	4
Assigning LeanData Permission Sets	6
Permission Set Details	8

Overview

Per Salesforce conventions, permission sets are “a collection of settings and permissions that give Users access to various tools and functions. The settings and permissions in permission sets are also found in profiles, but permission sets extend Users’ functional access without changing their profiles.”

In Salesforce, Users who fall under one profile can have a number of different permission sets depending on what applications they are using.

In order to utilize LeanData’s products, admins will need to ensure the proper Users have the correct LeanData Permission sets that correspond to the level of access they should have.

LeanData Permission Sets

LeanData View

A restrictive permission set that will allow a User to see the LeanData View Visualforce components on Lead, Contact, and Account records.

Unless they have additional permissions, Users who have this permission set will not be able to access other components in the LeanData Dashboard.

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. This Permission Set will be automatically assigned to anyone who is designated as a Round Robin Pool Manager.

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 with high level information without providing the 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 Object 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

- Applicable to LeanData Attribution customers only
- Gives access and edit permissions to LeanData's Custom Marketing Touch Object and allows users to view and create reports using this Object
- The Integration User running the Attribution batches will need this permission set.

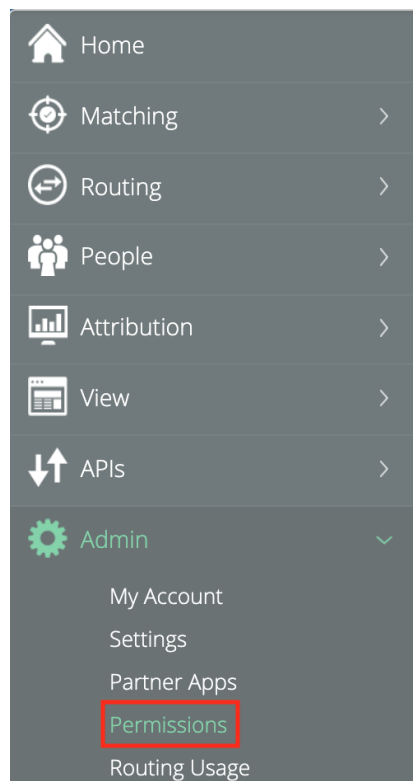
- Before assigning to users, admins will have to first create this permission set via the Attribution General Settings Page in the LeanData dashboard.

Assigning LeanData Permission Sets

You can assign any of LeanData's permission sets the same way you would assign any other permission set, in the Setup section of Salesforce. Additionally, LeanData will allow admins to assign Permission Sets by profile via the LeanData Dashboard.

Note: This does not apply to the LeanData Marketing Touch Permission Set, which needs to be assigned conventionally in Salesforce.

Navigate to the LeanData Dashboard → Admin → Permissions.



Click the Dropdown next to the profile to which you wish to assign a LeanData Permission set and select the Permission set you wish to give to all users with that Profile.

Profile Name	Permission Set
System Administrator	LeanData Custom Objects Full Access
Solution Manager	LeanData Read Only with Routing Insight
Read Only	LeanData Dashboard Access
Custom: Sales Profile	LeanData Dashboard Access
Custom: Marketing Profile	LeanData Dashboard Access
Custom: Support Profile	LeanData Dashboard Access
Marketing User	LeanData Read Only with Routing Insight
Contract Manager	LeanData Dashboard Access
Standard User	LeanData Dashboard Access

Click **Save Permission Set Assignments** at the top of the page.

Assign Permission Sets

Clear All Permission Set Assignments **Save Permission Set Assignments**

If you wish to clear your current assignments and start over, you can click the Clear All Permission Set Assignments button at the top of the page

Permission Set Details

The following will detail which screens each permission set will have access to. A Yes in the Access column indicates that the user will have access to that page. No means no access. A Self next to a Yes indicates that the user has access to the screen but only for their record. For example, a user with this access can add working hours but only for themselves.

LD Page	Dashboard	Pool Participant	Pool Manager	Read Only w/ Routing Insights
Tagging Preview	Y	No	Y	Y
FlowBuilder Edit / View	No	No	No	No
Audit Logs	Y	No	Y	Y
Routing Insights & Deployment History	No	No	No	Y
Advanced Settings (Owner Mappings, etc.)	No	No	No	No
Round Robin Pool Page/Editor	No	No	<i>Y (Pools Managed)</i>	No
Territory Management	No	No	No	No
Routing Scheduler	No	No	No	No
Users	Y	<i>Y (Self)</i>	<i>Y (Self + Members in Pools Managed)</i>	No
View Pool Names	No	<i>Y (Pools participated)</i>	<i>Y (Pools Managed)</i>	No
Create/Edit Working Hours & Holidays	No	No	Y	No
Add Working Hours	<i>Y (Self)</i>	No	<i>Y (Self + Members in Pools Managed)</i>	No
Add Vacations	<i>Y (Self)</i>	<i>Y (Self)</i>	<i>Y (Self + Members in Pools Managed)</i>	No
Pause	<i>Y (Self)</i>	<i>Y (Self)</i>	<i>Y (Self + Members in Pools Managed)</i>	No

Add Existing Holiday Sets	Y (Self)	No	Y (Self + Members in Pools Managed)	No
Admin / Settings > Permissions	No	No	No	No

Questions? [Please Submit a ticket to LeanData Support](#)