

# LeanData Routing

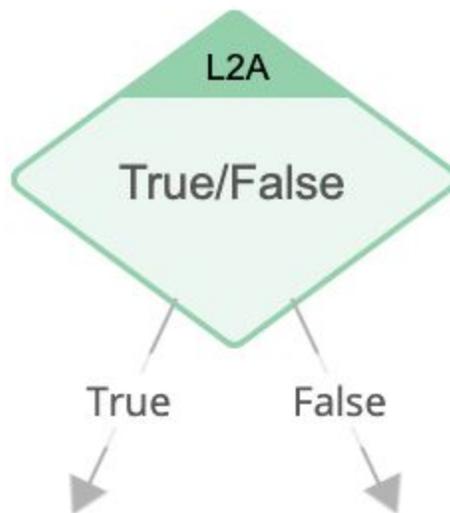
True/False Decision Node Guide



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## Overview

The True/False Decision Node allows you to make branching logic based on the criteria on a record or on a record you previously matched using a Match Node. Utilize a True/False node to determine if a certain condition is met and then determine the path the Lead record should take. This node allows for 2 outcomes, True or False. If you have multiple conditions that require more than 2 outcomes (such as geo, industry, company revenue size etc), utilize the Branch Decision node.



**Example:** Conner is the LeanData admin for Lighthouse Development and has been tasked to edit their Lead Router. Currently they are routing all Leads through the router but this is resulting in poor quality Leads getting to the reps. Marketing has decided that only marketing qualified Leads should be passed to the reps. All non-qualified Leads will be routed to a holding queue. Conner adds a True/False Decision Node to the Router Flow to determine if the Lead has been marked as Marketing Qualified.

## Customization

When you select a True/False decision node, you need to determine which object you're evaluating to see if a condition is met.

<b>LEAD</b> Lead	<b>T/F</b> True/False	Decision
<b>L2L</b> Lead to Lead (L2L)	<b>Branch</b>	Action
<b>L2A</b> Lead to Account (L2A)		Time-Based
<b>L2O</b> Lead to Opportunity (L2O)		Partner
<b>DupeL</b> Duplicate Lead (DupeL)		
<b>DupeC</b> Duplicate Contact (DupeC)		
<b>RA</b> Related Activity (RA)		
<b>RCM</b> Related Campaign Member (RCM)		

For Lead Router, you have the following options:

- **Lead:** The condition is being evaluated against the incoming Lead that is being processed through the router flow.
- **Lead2Lead (L2L):** The condition is being evaluated against a matched Lead from a prior Lead Match Node.
- **Lead2Account (L2A):** The condition is being evaluated against a matched Account from a prior Account Match Node.
- **Lead2Opportunity (L2O):** The condition is being evaluated against an Opportunity from a prior Opportunity Match Node.
- **Duplicate (Dupe):** The condition is being evaluated against a potential duplicate Lead from a prior Dupe Lead Match Node.
- **Duplicate Contact (DupeC):** The condition is being evaluated against a potential duplicate Contact from a prior Dupe Contact Match Node.
- **Related Activity (RA):** The condition is being evaluated against a matched Related Activity from a prior Related Activity Match Node.
- **Related Campaign Member (RCM):** The condition is being evaluated against a matched Related Campaign Member from a prior Related Campaign Member Match Node, or from the Campaign Member that triggered routing.

For Contact Router you have the following options:

- **Contact:** The condition is being evaluated against the incoming Contact that is being processed through the router flow.
- **Contact2Contact:** The condition is being evaluated against a Contact from a prior Contact Match Node.
- **Contact2Opportunity:** The condition is being evaluated against an Opportunity from a prior Opportunity Match Node.
- **Duplicate Contact (CDupe):** The condition is being evaluated against a Duplicate Contact from a prior Duplicate Contact Match Node.
- **Related Activity (RA):** The condition is being evaluated against a matched Related Activity from a prior Related Activity Match Node.
- **Related Campaign Member (RCM):** The condition is being evaluated against a matched Related Campaign Member from a prior Related Campaign Member Match Node, or from the Campaign Member that triggered routing.

For Account Router, you have the following options:

- **Account:** The condition is being evaluated against the incoming Account that is being processed through the router flow.
- **Account2Opportunity:** The condition is being evaluated against an Opportunity from a prior Opportunity Match Node.
- **Related Activity (RA):** The condition is being evaluated against a matched Related Activity from a prior Related Activity Match Node.

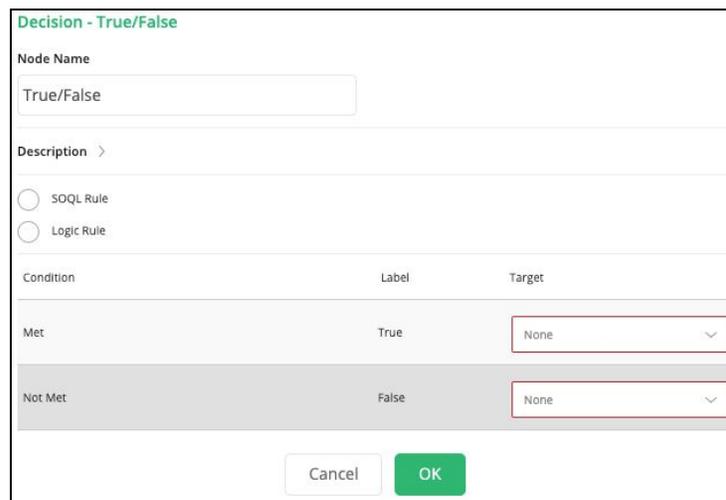
For Opportunity Router, you have the following options:

- **Opportunity:** The condition is being evaluated against the incoming Opportunity that is being processed through the router flow.
- **Opportunity2Contact:** The condition is being evaluated against a Contact from a prior Contact Match Node.
- **Opportunity2Opportunity:** The condition is being evaluated against an Opportunity from a prior Opportunity Match Node.
- **Related Activity (RA):** The condition is being evaluated against a matched Related Activity from a prior Related Activity Match Node.

For Case Router, you have the following options:

- **Case:** The condition is being evaluated against the incoming Case that is being processed through the router flow.
- **Related Activity (RA):** The condition is being evaluated against a matched Related Activity from a prior Related Activity Match Node.

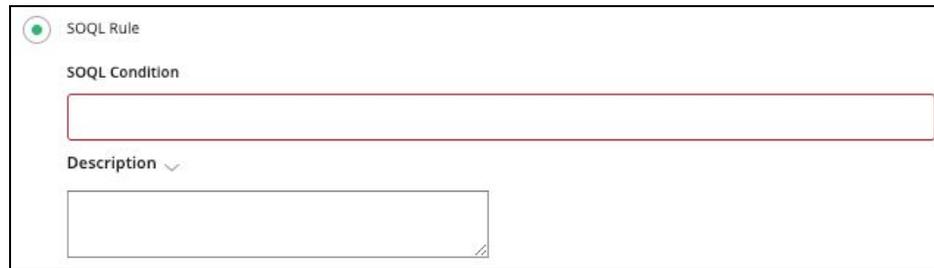
After you have selected the type of True/False node, you have a number of options to configure the node.



Condition	Label	Target
Met	True	None
Not Met	False	None

- **Node Name:** By default, the Node Name is set to True/False. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the decision. This will help others understand the purpose of the node. For our example, we would call this node, Marketing Qualified?
- **Description:** This field is not required but we recommend adding a description to document any customizations made to the node. If someone else needs to take over the management of the flow, they will be able to understand the goal of the customizations.
- **Related Campaign Member Object:** For the Related Campaign Member True-False Node, you will have the option to select which Related Campaign Member will be used in the decision node, either the Matched Campaign Member from a prior match node, or from the Campaign Member that initiated routing. This option will only be available in the Related Campaign Member Decision Nodes in Lead and Contact Router
- **Rule Type:** You have 2 options for building rules in the True/False decision node:
  - **SOQL:** The SOQL (Salesforce Object Query Language) option gives you a box where you can enter custom SOQL queries to search your database. There is also a Description that you can add notes about the SOQL code. Your Implementation Consultant can help you create the appropriate SOQL queries or

you can see Salesforce's help system for more information on SOQL. Using this option is uncommon.



The screenshot shows a configuration window for an SOQL Rule. At the top left, there is a green circle icon and the text "SOQL Rule". Below this, the label "SOQL Condition" is followed by a large, empty text input field. Underneath, the label "Description" is followed by a smaller, empty text input field with a small downward arrow icon to its right.

- Logic: The Logic option gives you tools native to LeanData to set up the criteria for the decision of the node.
- **Results:** The results section gives you 2 options: Met and Not Met. Each option gives you an edge to route the results of the decision node.

## Logic Rules

When you select Logic Rule for the basis of the Decision Node, you will see tools to help you build the logic behind the decision being applied to the record.

Under the option, Logic Rule, you will find the following:

- **Field:** The Field selector will give you a list of all the fields on the record (Lead, Contact, Account, etc.) that you are routing.
- **Operator:** The Operator gives you a condition to apply to the field for the decision. (Example: Contains, does not contain, starts with, is null, etc). The values in the Operator selection change depending on the field selected.
- **Value:** The Value is the value you are evaluating against in your selected field.

**Example:** The screenshot below shows how Conner can set up the True/False Decision Node to check if the Lead has been set to Marketing Qualified.



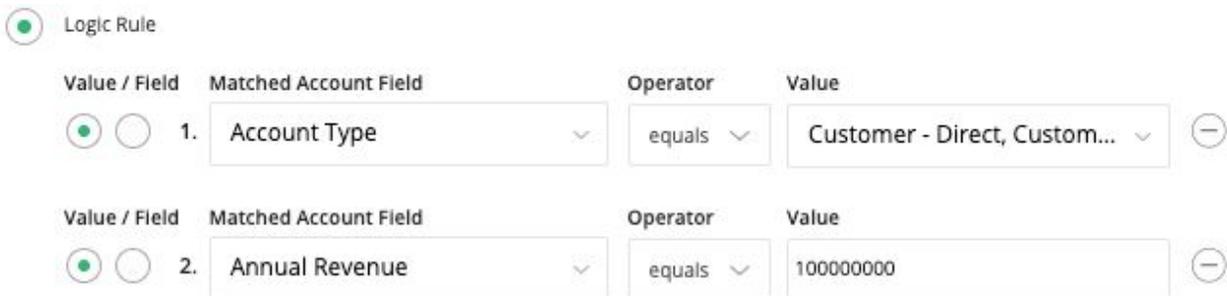
The screenshot shows a configuration window for a Logic Rule. At the top left, there is a green circle icon and the text "Logic Rule". Below this, there are three columns: "Lead Field", "Operator", and "Value". Under "Lead Field", there is a dropdown menu with "1." and "Status" selected. Under "Operator", there is a dropdown menu with "equals" selected. Under "Value", there is a dropdown menu with "Marketing Qualified" selected.

## To Add a Logic Rule to the Decision Node:

1. Click on the True/False Decision Node.
2. Click the pencil icon to the right of the node. The edit window opens on the right side of the page.
3. Select the option: Logic Rule. The screen displays the Field, Operator, and Value boxes.
4. Select the desired field to apply the decision to. If you start typing the first letters for the desired field such as “st” for status, you will see the list filter for just fields that have the text combination you entered.
5. Select the desired operator.
6. Enter/select the value you are evaluating against in your selected field.
7. Set other fields as needed.
8. Save.

## Logic Rules with Matched Records

When working with Matched records, the options you will see depends on the type of node you are configuring. If you are configuring a Lead2Lead True/False Node you will see Matched Lead fields in your Logic. If you are configuring a Lead2Account you will see Matched Account fields as you can see in the screenshot below.



The screenshot shows a configuration window for a Logic Rule. At the top, there is a radio button labeled "Logic Rule" which is selected. Below this, there are two rows of configuration fields. Each row has a "Value / Field" column with a radio button, a "Matched Account Field" column with a dropdown menu, an "Operator" column with a dropdown menu, and a "Value" column with a text input field. The first row is numbered "1." and shows "Account Type" selected in the dropdown, "equals" in the operator dropdown, and "Customer - Direct, Custom..." in the value field. The second row is numbered "2." and shows "Annual Revenue" selected in the dropdown, "equals" in the operator dropdown, and "100000000" in the value field. Each row also has a minus sign icon on the right side.

The matched record fields you can access depends on the type of True/False node that you selected and if you have previously matched to a record of the same type. For example, in order to access Matched Account Fields, you need to have previously matched to an account in the Router flow and the True/False node type you selected needs to be Lead2Account. These two factors will configure the node to pick up matched account fields as you can see in the screenshot above.

**Please Note:** If you select a specific True/False node (Lead2Account for example) and have not previously matched to the same object type, (Account), you will still be able to configure the node with the matched fields but you will get an error when saving the node configuration.

<b>LEAD</b> Lead	<b>TF</b> True/False	<b>Decision</b>
<b>L2L</b> Lead2Lead	<b>Branch</b>	<b>Action</b>
<b>L2A</b> Lead2Account		<b>Time-Based</b>
<b>L2O</b> Lead2Opportunity		<b>Partner</b>
<b>DUP</b> Duplicate		
<b>DPC</b> Duplicate Contact		

### Logic Rules - Value vs Field

When configuring a Logic Rule in a True/False Decision node you have a choice of comparing a Field to a specific value or comparing a Field against another field on the matched record. In our previous examples we have discussed comparing a Field to a Value. By selecting Field, you can compare the value in one field to the value in another field. In the screenshot below, you will see the node is configured to compare the Billing Country on a matched Account with the country on the Lead. Using the Field option gives you the ability to test for matching values.

**For Example:** Conner needs to set up a True/False node in the flow to test for leads with a country that are the same as the country on the Matched Account record.

Logic Rule

Value / Field	Matched Account Field	Operator	Lead Field
<input type="radio"/> Value <input checked="" type="radio"/> Field	Billing Country	equals	Country

New condition

### Working with Multiple Conditions

True/False Decision Nodes include only 1 rule for the decision. However, within the 1 rule, you can have multiple conditions. When you have a rule with multiple conditions you are given the option to specify the relationship between the conditions. By default, you will see an AND relationship. You can change this to OR as needed. You can also use parentheses to group conditions together. Example: ((1 AND 2) OR 3).

**Logic Rule**

	Lead Field	Operator	Value
1.	Status	equals	Marketing Qualified
2.	Rating	equals	Warm, Hot

[+ New condition](#)

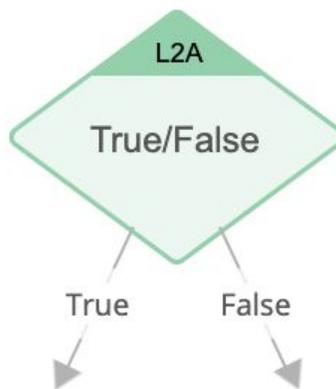
**Rule Logic (Default)**

1 AND 2

[Description >](#)

## Node Edges

The True/False Decision Node gives you 2 edges to route records through, Met and Not Met. All records that meet the Logic Rule and Conditions you have set, will be sent through Met edge. All records that do not meet the rules and conditions will be routed through the Not Met edge.



## Things to Know & Best Practices

- Use Logic rules rather than SOQL conditions as much as possible.
- If you need more than 2 outcomes, use a Branch Node instead of a True/False node.
- Change the names of the Labels as needed to help identify certain paths in the flow.
- Change the names of your Nodes so you can easily decipher the condition or criteria going through that node.
- Add descriptions wherever you can.

- You can only use a Decision node that references fields on a matched record if you had previously found a matched record in a corresponding match node.

## Summary

The True/False Decision Node is a powerful tool to test a record against a specific condition and to determine the record's route through your router flow. The True/False node gives you two edges for records that meet the conditions of the node and the records that do not meet the node conditions. Using the customization settings, you can create a powerful test for your records. For more information on working with router flows please see our Lead Routing Guide: <https://leandatahelp.zendesk.com/hc/en-us/articles/360016339074>