

Opportunity Routing

Opportunity2Opportunity
Match Node Guide

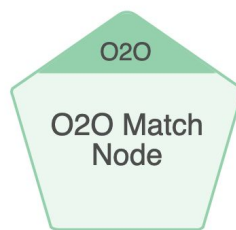


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Overview

The Opportunity2Opportunity (O2O) Match Node is used to identify Opportunities in your Salesforce instance and match them to the routed Opportunity in Opportunity Router. This node is specific to LeanData Opportunity Router. Once the Opportunity has been matched to the routed Opportunity record you can route the Opportunity record to the owner of the matching Opportunity. The Opportunity2Opportunity (O2O) Match Node also includes filters and Tiebreakers to help you identify the best Opportunity record if there are multiple potential Opportunity.

Please Note: The only Opportunities that are eligible are the Opportunities that belong to the same Account as the routed Opportunity. This node is primarily used to apply Filters and Tiebreakers to select the best Opportunities from those under the Account.



Example: Ari is the LeanData admin for Lighthouse Development. In her Opportunity Router flow, she needs to match the routed Opportunity to the best Opportunity under the matched Account. She configures the O2O Node, with Filters and Tiebreakers to match to the right Opportunity. Using the Filters, she ensures that the routed Opportunities are not matched to any Opportunities below 25,000 dollars.

Each Match node includes Tiebreakers to identify the best matched record if there is more than 1 possible match. Tiebreaker rules are included in the node configuration to pick the best match when LeanData finds multiple Opportunities. These Tiebreakers function just like the Tiebreakers in Tagging. The Tiebreakers in the node are local only to the node. Any changes made to the node's Tiebreakers do not affect the Tagging Tiebreakers or even the Tiebreakers in other match nodes.

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Filter Matched Opportunities
- Prioritize Matched Opportunities
- Advanced Settings

Match: Opportunity to Opportunity (O2O)

Node Name

Description >

1 Filter Matched Opportunities
Identify matched Opportunities to be considered/excluded:

Include matched Opportunities based on conditions:

Exclude matched Opportunities based on conditions:

Value / Field	Matched Opportunity Field	Operator	Value	
<input checked="" type="radio"/> <input type="radio"/>	1. Amount	less than	50000	Insert

Do not filter

2 Prioritize Matched Opportunities
Identify the ultimate matched opportunity to be selected in cases where LeanData finds multiple matched opportunities.

<input type="button" value="+"/>	(Closed equals false)	<input type="button" value="-"/>
<input type="button" value="+"/>	(Stage contains open)	<input type="button" value="-"/>
<input type="button" value="+"/>	Created Date MIN	<input type="button" value="-"/>

Advanced Settings >

Node Name

By default, the Node Name is set to Match Node. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the goal of the Match Node or simply O2O Match Node. This will help others understand the purpose of the node.

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, the description will help them to understand the goal of the customizations.

Filter Matched Opportunities

Use Filters to include or exclude Opportunities from matching to the routed Opportunity record. In our example, we are excluding Opportunities that have an Amount less than 50,000.

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Value / Field	Matched Opportunity Field	Operator	Value	
<input checked="" type="radio"/> <input type="radio"/>	1. Amount	less than	50000	Insert

Do not filter

Do not filter

Value/Field

The Value/Field selector lets you choose between filtering for a value in a field on the Matched Opportunity record and/or comparing a field on the Matched Opportunity record with a field on the routed Opportunity record.



When using Value, you are looking for a specific value in a field on the Matched Opportunity record. For example, if you wanted to exclude Opportunities that have an amount less than 50,000, you could select the Amount field, set the Operator to less than, and enter 50,000 for the value.

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Exclude matched Opportunities based on conditions:

Value / Field	Matched Opportunity Field	Operator	Value	
<input checked="" type="radio"/> 1.	Amount	less t...	50000	Insert ▾ (-)
<input type="radio"/> 2.	Product	not e...	Product	(-)

+ New condition

Rule Logic (Default)

1 OR 2

Do not filter

When using Field, you are comparing the value of a field on the Matched Opportunity record with a field on the routed Opportunity record. For example, you can filter out any matched Opportunity that does not have the same value in the Product field. To do this, set the Matched Opportunity Field to Product, the operator to Not Equals, and then set the Opportunity Field to Product. When you change the selector to Field, the label for the Value field will change to Opportunity Field.

For each condition you add, you will see:

- **Field:** The Field selector will give you a list of all the fields on the Matched Opportunity record that you are filtering.
- **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/Field:** The Value is the value you are evaluating against in your selected field. This is typically a pull-down menu of possible values. If you select Field for Value/Field, you will see Opportunity Field as the label and the field will be a pull-down of fields on the routed Opportunity record.

You can add as many conditions as needed to create the desired Filters.

Working with Multiple Conditions

When you edit or add rules, 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 such as ((1 AND 2) OR 3).

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Value / Field	Matched Opportunity Field	Operator	Value	
<input checked="" type="radio"/> 1.	Amount	less t...	50000	Insert <input type="button" value="v"/> <input type="button" value="−"/>
<input type="radio"/> 2.	Product	not e...	Product	<input type="button" value="−"/>

New condition

Rule Logic (Default)

1 OR 2

Do not filter

In the example above we use an OR relationship because we are looking to exclude either an Opportunity with an Amount less than 50,000 or an Opportunity where the value in the Product field does not equal the same value on the routed Opportunity Record.

Prioritize Match Opportunities

In the Prioritize Matched Opportunities section you will see a list of rules called Tiebreakers. These rules are applied after filters if there are multiple Opportunities that can match to the routed Opportunity record. Tiebreaker rules are processed from the top down and are used to narrow the pool of possible Opportunity matches down to the best match. The node will check each rule, one at a time, from top to bottom, until only one remaining potential Opportunity remains. This Opportunity will be matched to the routed Opportunity. The Opportunity2Opportunity node includes a set of default Tiebreaker rules. You have the following options to modify the Tiebreakers:

- Edit the existing rules
- Add/remove rules
- Change the order of the rules

2 Prioritize Matched Opportunities
Identify the ultimate matched opportunity to be selected in cases where LeanData finds multiple matched opportunities.

↕	(Closed equals false)	-
↕	(Stage contains open)	-
↕	Created Date MIN	-

+ New Rule

Editing a Rule

To edit a rule, simply click in the rule to open it for editing. You will see the same options as in the Filters.

2 Prioritize Matched Opportunities
Identify the ultimate matched opportunity to be selected in cases where LeanData finds multiple matched opportunities.

↕	(Closed equals false)			-
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Value / Field	Matched Opportunity Field	Operator	Value
<input checked="" type="radio"/> <input type="radio"/>	1. <input type="text" value="Closed"/>	<input type="text" value="equals"/>	<input type="text" value="False"/>

+ New condition

Adding a Rule

When adding a new rule, you must first select the type of rule to create. You have 3 options:

- **Logic** - This option lets you use the LeanData logic interface to build your rule.
- **SOQL** - This option lets you build a rule using Salesforce's Object Query Language.
- **Min/Max** - This option lets you build a rule using a set of fields designed for minimum and maximum value comparisons such as Created Date, Amount, etc.



Advanced Settings

Under Advanced Settings there are options for setting the targets for the node edges.

Node Edges

There are 2 exit edges from a Match Node. A routed Opportunity will exit this node with 0 or 1 matches. Under the Advanced settings you can select a target node for each of the edges.

Advanced Settings ▼	
Specify next node, if any, when a condition below is met.	
Condition	Target
Match	Route to Matched Opportunity ▼
No Match	Route to Matched Account ▼

Summary

The Opportunity2Opportunity (O2O) Match Node is used to identify Opportunities in your Salesforce instance and match them to the routed Opportunity in the Opportunity Router. This node is specific to LeanData Opportunity Router. Using a combination of the Filters and Tiebreakers, you can match the best Opportunity to the routed Opportunity.

For more information on working with Opportunity Router flows please see our Opportunity Routing Guide:

<https://leandatahelp.zendesk.com/hc/en-us/articles/360020541133-Routing-Opportunity-Router-Guide>