

LeanData Routing

New Entry Node



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Overview

LeanData Router includes a New Entry node as an entry point for processing new records through your Router flow as they are created in your Salesforce instance. The New Entry Node is the same for each of the Router Types:

- Lead Router - New Lead
- Contact Router - New Contact
- Account Router - New Account
- Opportunity Router - New Opportunity
- Case Router - New Case



The New Entry Node is the default entry point for triggering new records (Leads, Contacts, Accounts, etc.) to get processed by your LeanData Router flow. All New Entry Nodes share the same features regardless of the object type. We will use Leads as examples but the information will translate to all the different object flows. You customize this node and what passes through it using filters to include or exclude specific records based on their attributes and field/values.

New Lead Trigger

Description >

New Leads to be sent through the lead workflow

All Leads

None

Include The Leads Below:

Advanced Settings >

Customization

The customization options give you the tools to configure the behaviour of the New Entry Node. Many customers use some type of filtering on this node instead of simply sending all Leads through the node.

Example: *Hillary is the LeanData admin at Lighthouse Development. She is tasked with creating a Router Flow for Leads. She is instructed to only route Leads that come from their marketing automation and to ignore Leads entered manually by the reps. She can customize the node to ignore all Leads except the ones from their marketing automation User.*

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.

New Leads to be sent through the Lead workflow

This setting allows you to choose the Leads that the New Entry node will pass to the rest of the flow.

- All Leads: Send all new Leads through the router flow
- None: Do not send new Leads through the router flow. This will effectively stop new Leads from entering the flow.
- Include the Leads below: Use filters on Lead fields/values to specify which new Leads to route through the flow.

New Leads to be sent through the lead workflow

- All Leads
- None
- Include The Leads Below:

Filtering

If you choose to filter the Leads coming through the New Entry Node, you have many options. You can have 1 or more filters on the New Entry Node. When you choose to use filtering, you will see 1 default rule. You can have multiple rules with multiple conditions. When you create a rule with multiple conditions you will be given an option for how to relate the conditions within the rule.

Under the option, Include the Leads Below, you will find the following:

- **Condition**
The Condition is used to set up the desired filtering. The results will be sent on through the flow using the Target.
- **Label**
The Label is used to let you name the connection to the next node that the Lead will follow from the New Entry Node. The words Edge 1 can be customized.
- **Target**
The Target field is a drop-down menu of the other nodes in the flow. Selecting a node from this dropdown will indicate which node, a Lead that meets this condition, should progress to next. You can also select “End of Flow” if you don’t wish to direct this to any node. As you create other nodes, they will appear on this list.

Include The Leads Below:

Condition	Label	Target
 <i>Edit condition</i> 	Edge 1	None 

New Rule

To Add a Filter to the New Entry Node:

1. Click on the New Entry Node.
2. Click the pencil icon to the right of the node. The edit window opens on the right of the page.
3. Select the option: Include the Leads Below
4. Click Edit Condition. You will see new fields displayed for Lead Field, Operator, and Value. Edit these fields as needed to create the desired filter condition.

Each rule you add creates a new edge for the node. A rule with multiple conditions will still only add 1 edge. Edges are outcomes from a node that can be used to connect to a next node.

Multiple Filters

You can create multiple filters as needed on the node. Each new rule creates a new edge for records to follow. By default, you get 1 rule when filtering. You can add additional conditions to the rule and/or add additional rules with conditions, allowing you to have very complex filtering.

When using multiple rules, the node will process each rule sequentially until the record meets a rule, and then it will direct the record using the edge for the corresponding rule.

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: Hillary needs to edit the Router Flow so that Leads that have an industry of Technology OR an annual revenue of greater than 25 million are routed to the Enterprise Sales Team. She can do this by adding a rule with the conditions of revenue and industry and an OR relationship. All other Leads will be routed to the rest of the sales team.

Include The Leads Below:

Condition	Label	Target
<div style="display: flex; align-items: center;"> + (Annual Revenue greater than 25000000) AND (Industry equals tech, Technology) </div>	Edge 1	<div style="border: 1px solid red; padding: 2px;">None</div>

	Lead Field	Operator	Value	
1.	Annual Revenue	greater...	25000000	-
2.	Industry	equals	tech, Technology	-

New condition

Rule Logic (Default)

1 AND 2

Description >

New Rule

Please Note: You can add this type of filtering to other nodes in the flow. You do not need to filter all the records in the New Entry Node. The Branch Node is typically a better option if you need multiple exit routes from a node.

Things to Know & Best Practices

- New Lead Node cannot be deleted. If you don't plan to route new Leads you can inactivate the node by setting New Leads to be sent through the Lead workflow to None.
- Each Rule you add creates a new edge for a Lead to follow
- If you are using an active SFDC Assignment Rule, please note that the New Lead Node will evaluate the Lead at the point of insert, BEFORE the SFDC Assignment Rule has updated the Lead owner.
- We recommend deactivating your SFDC assignment rules and building the logic within FlowBuilder itself. If you cannot deactivate your SFDC Assignment rules, it may make sense to utilize the Updated Lead Node or to add a separate decision node after this New Lead node to filter out Leads that you may not want to proceed through LeanData routing. You can consult your Implementation Consultant for further details.

Summary

The New Entry Node is the default starting place for all new records in your router flows. You can choose to evaluate all new records or choose to filter for specific records to send through the flow. For more information on working with router flows please see our Lead Routing Guide: <https://leandatahelp.zendesk.com/hc/en-us/articles/360016339074>