

# LeanData Routing

Send Notification Node Guide



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## Overview

The Send Notification Node gives you the ability to send Notifications to various users in Salesforce or by email. While all Action nodes already include the ability to send a notification when the record moves through the node, this requires some action be taken on the record in order to send the notification. Using the standalone Send Notification Node allows you to send an email or Chatter notification without having to take an action on the record first.



**Example:** Majid is the LeanData administrator for Lighthouse Development. In their Router Flow, they use a Round Robin node to assign Leads to reps. Once the Lead is assigned to a rep, Majid adds a Send Notification Node to send an email or Chatter notification to the rep to let them know they have a new Lead to work with.

## Customization

You have a number of options to configure the node.

- Node Name
- Description
- Channel Options
- Advanced Settings

**Action: Send Notification**  
For Slack Notifications use Partners > Slack > Send Notification node

**Node Name**

**Description** >

**Channel**

Chatter

Email

**Advanced Settings** ▾

Specify next node, if any, when a condition below is met.

Condition	Label	Target
Next Node	Next Node	END OF FLOW ▾
Invalid Email Template	Invalid Email Template	END OF FLOW ▾

### Node Name

By default, the Node Name is set to Send Notification. You can change this label to anything you need. We strongly recommend giving this node a meaningful name as you may have multiple nodes with the default name of Send Notification. An example of a meaningful name is New Lead Notification.

## 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.

## Channel Options

The Send Notification Node has 2 types of Channel options: Chatter and Email. Select the option box next to the Notification you wish to send. You can use both types of notifications at the same time if needed.



A rectangular box with a thin black border. At the top left, the word "Channel" is written in a bold, sans-serif font. Below it, there are two vertically stacked options. Each option consists of a small, empty square checkbox followed by the text "Chatter" and "Email" respectively.

## Edit Recipients

Use the Edit Recipients button to open the recipients options. You can select multiple recipients. Recipient options include:

- **New Owner** - This option is selected by default and will send the notification to the new record owner.
- **Previous Owner** - This option will send the notification to the previous owner of the record.
- **Additional Recipients** - This option can be used to add the Chatter notification to the routed Lead record by selecting the Routed Lead and then the Lead Id. You can also use this option to post the Chatter notification to the Lead Owner or another individual.
- **Chatter User(s)** - This option will send the Chatter notification to the selected Chatter User(s).
- **Chatter Group(s)** - This option will send the Chatter notification to the selected Chatter Group(s).

**Please Note:** The Recipients set are used for both Chatter and Email. The Chatter Users and Groups options will only be used if you select Chatter as a Channel option.

**Recipient(s)**

New Owner

Previous Owner

Additional Recipients ?

Search ▼

Chatter User(s)

Search ▼

Chatter Group(s)

Search ▼

Done

### Additional Recipients

Use this option to send the notification to a User on the routed record, on a matched Object, or on a matched created Object.

Additional Recipients ?

Search ▼

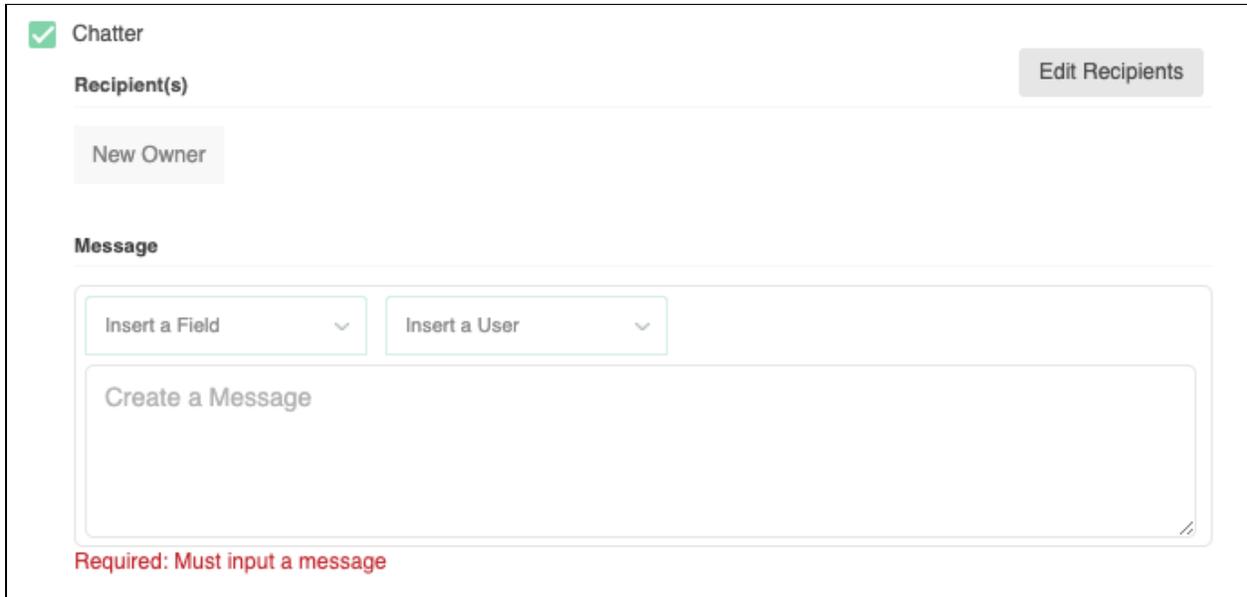
After you select the desired recipients, and select Done, your selected recipients will be displayed in the recipients section.

**Recipient(s)** Edit Recipients

New Owner Previous Owner

## Chatter Notifications

The Chatter Notification option gives you the tools to post a Chatter notification to a user or a record in Salesforce. Use the Message section to compose the Chatter Notification.



The screenshot shows the Chatter notification configuration interface. At the top left, there is a checked checkbox labeled "Chatter". To the right of this is a button labeled "Edit Recipients". Below this is a section titled "Recipient(s)" containing a button labeled "New Owner". Underneath is a section titled "Message". This section contains two picklist boxes: "Insert a Field" and "Insert a User". Below these is a large text area labeled "Create a Message". At the bottom of the form, there is a red error message that reads "Required: Must input a message".

Using the Create a Chatter Message box, you can compose your Chatter Notification. Use the Insert a Field box to pick information from the record to insert into the notification. With the Insert Field pull-down you can select information about:

- The record owner
- A specific user
- The routed record
- A link to the Audit Log for the Lead

### Message

The Message Section contains options for composing a Chatter Message. Use the **Insert a Field** picklist to insert field(s) from the Owner, Routed Record, or a link to the audit log for the routed record.

Use the Insert a User picklist to insert a Salesforce User name. In the **Create a Message** field you will see the Salesforce ID for the selected user, <@0052E00000FYkQcQAL> for example.



### Email Notifications

The email notifications section allows you to configure how the Send Notification Node sends email notifications. You select your recipients and then build your message. You have 2 options for creating the email notification:

- **Email Template** - Use the email template option to select from your existing email templates in Salesforce.
- **Compose Email** - Use the compose email option to build an email notification using field(s) from the Owner, Routed Record, or a link to the audit log for the routed record.

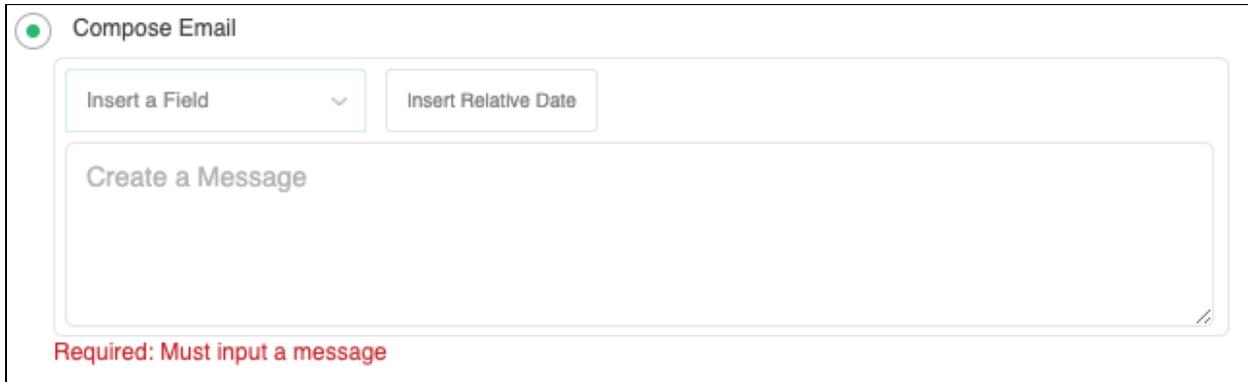
### Email Template

When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



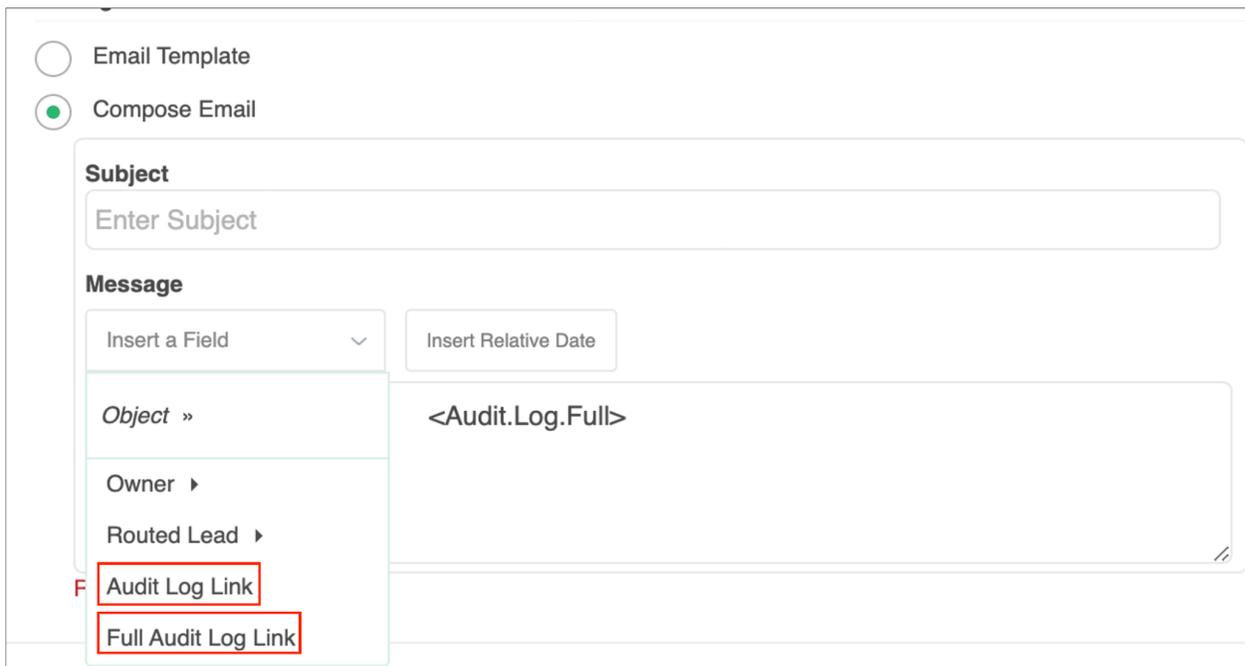
## Compose Email

The Compose Email option allows you to create a new email message in the node. Use the Insert a Field picklist to add fields from the routed record to the message.



The screenshot shows the 'Compose Email' form. At the top left, there is a radio button selected for 'Compose Email'. Below this, there are two buttons: 'Insert a Field' with a dropdown arrow and 'Insert Relative Date'. A large text area below these buttons contains the placeholder text 'Create a Message'. At the bottom left of the text area, there is a red error message: 'Required: Must input a message'.

You can insert fields from the routed record or any record related with the matched record. In addition to these fields, you can also insert a link to the audit log for this specific routing action, or to the audit log for every action performed on this record in LeanData. When selecting your field to insert, select either **Audit Log Link** or **Full Audit Log Link** to include the Audit Log URL in your message.



The screenshot shows the 'Compose Email' form with the 'Insert a Field' picklist open. The 'Compose Email' radio button is selected. The 'Subject' field contains the placeholder 'Enter Subject'. The 'Message' field contains the placeholder '<Audit.Log.Full>'. The 'Insert a Field' picklist is open, showing a list of fields: 'Object »', 'Owner ▶', 'Routed Lead ▶', 'Audit Log Link', and 'Full Audit Log Link'. The 'Audit Log Link' and 'Full Audit Log Link' options are highlighted with red boxes. The 'Insert Relative Date' button is also visible.

Use the Insert Relative Date to add the date the record was routed or a set number of days after the date the record was routed.

### Insert - Relative Date

Specify a relative date to insert in the field.

Today

days after today

## Advanced Settings

The Advanced Settings section gives you the ability to send the record to the next node of the flow as needed.

- **Next Node:** This option allows the record to be directed to another node in the Router Flow. This can include things like Converting the Lead into a Contact, Creating an Account, etc. You can also set this node to End of Flow. This will stop all LeanData actions at this node instead of sending it to another node.
- **Invalid Email Template:** This option provides a fallback edge to keep the record moving through the router flow even if the email template has been deleted and the email notification cannot be sent.

## Summary

The Send Notification Node is a great option for sending out email or Chatter notifications on a routed record without having to take an action on the record first.

For more information on working with router flows please see our Lead Routing Guide:  
<https://leandatahelp.zendesk.com/hc/en-us/articles/360016339074>