

LeanData Routing

Lead2Opportunity Match Node Guide



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Overview

The Lead2Opportunity (L2O) Node is used to find the best Opportunity the routed Lead record matches to in your instance of Salesforce. When a Lead enters the node, the node will look for Opportunities to match to the Lead. Using selected Filters, the node will find any potential Opportunities to match to the routed Lead. When multiple potential Opportunities match to the Lead, the node will use the configurable Tiebreaker rules to determine the best Opportunity to match to the Lead. All Lead records will exit match nodes with either 1 or 0 Opportunity matches. The L2O node typically requires that an Account Match has been made earlier in the Lead Router Flow.



Example: Sophia is the LeanData admin for Lighthouse Development. In her Router flow, she needs to match the routed Leads to their matching Opportunities, if any. She configures the L2O Node, with Filters and Tiebreakers to match to the best Opportunity. Using the Filters, she ensures that the routed Leads are not matched to Opportunities with inactive Owners.

Each Match node includes Tiebreakers to enable making a match to the best 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 possible matched Opportunities. These Tiebreakers function just like the Tiebreakers in Tagging. The Tiebreakers on 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 on 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 Node

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:
- Do not filter

Restrict opportunities to matched Account (L2A match node required)

Exclude matched opportunities with inactive owners

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

Advanced Settings >

Cancel

OK

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 Opportunity Match. 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 the Filters to include or exclude matches based on the conditions you set on the node. You can use Filters to include or exclude Opportunities from matching to the Lead record. In our example, we are including only Opportunities that have a dollar amount greater than \$25,000.

Please Note: The L2O node typically requires that an Account Match has been made earlier in the Lead Router Flow.

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

Include matched Opportunities based on conditions:

Value / Field	Matched Opportunity Field	Operator	Value
<input checked="" type="radio"/> <input type="radio"/>	1. Amount	gr...	25000

Exclude matched Opportunities based on conditions:

Do not filter

Value/Field

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

Value / Field	Matched Opportunity Field	Operator	Value
<input checked="" type="radio"/> <input type="radio"/>	1. Amount	gr...	25000
Value / Field	Matched Opportunity Field	Operator	Lead Field
<input type="radio"/> <input checked="" type="radio"/>	2. Lead Source	eq...	Lead Source

When using Value, you are looking for a specific value in a field on the Opportunity record. For example, if you wanted to filter opportunities with a dollar amount over 25,000, you could select the Amount Field, set the Operator to Greater Than, and enter the dollar amount in the Value field.

When using Field, you are comparing the value of a field on the Opportunity record with a field on the routed Lead record. For example, if your goal is to compare the Lead Source on the Opportunity record to the Lead Source field on the routed Lead record, you could select Lead Source from both the Matched Opportunity Field and the Lead field. Setting the Operator to Equals ensures that the Logic rule will look for the same Lead Source on the Opportunity and Lead records. The label above the Value field will change to Lead Field.

For each condition you add, you will see:

- **Field:** The Field selector will give you a list of all the fields on the 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 Lead Field as the label and the field will be a pull-down of fields on the routed Lead 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. Example: ((1 AND 2) OR 3).

Include matched Opportunities based on conditions:

Value / Field	Matched Opportunity Field	Operator	Value
<input checked="" type="radio"/> 1.	Amount	gr...	25000
<input type="radio"/> 2.	Lead Source	eq...	Lead Source

New condition

Rule Logic (Default)

1 AND 2

Restrict Opportunities to Matched Account (L2A Match Node Required)

Use this option (checked by default) to restrict the potential opportunities to only the ones under the matched Account.

Restrict opportunities to matched Account (L2A match node required)

Exclude Matched Opportunities with Inactive Owners







This option, when checked, will prevent Opportunities with inactive owners from being matched to the routed Lead.

Exclude matched opportunities with inactive owners

Prioritize Matched 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 Lead 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 Lead. The L2O node includes a set of default Tiebreaker rules. You can:

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

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

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.

 (Closed equals false) 								
<table border="1"><thead><tr><th>Value / Field</th><th>Matched Opportunity Field</th><th>Operator</th><th>Value</th></tr></thead><tbody><tr><td><input checked="" type="radio"/> <input type="radio"/> 1.</td><td>Closed</td><td>equals</td><td>False</td></tr></tbody></table>	Value / Field	Matched Opportunity Field	Operator	Value	<input checked="" type="radio"/> <input type="radio"/> 1.	Closed	equals	False
Value / Field	Matched Opportunity Field	Operator	Value					
<input checked="" type="radio"/> <input type="radio"/> 1.	Closed	equals	False					
 New condition								
Description >								
 (Stage contains open) 								
 Created Date MIN 								

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 Amount or Created Date.



Advanced Settings

Node Edges

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

Summary

The Lead2Opportunity node is used to identify the Opportunity the routed Lead best matches to. Using configurable filters and Tiebreakers, the node will find the best Opportunity to match to the routed Lead. Leads will exit the node with either 1 match or no matches. The L2O node typically requires that an Account Match has been made earlier in the Lead Router Flow.

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