

Contact Routing

Contact2Opportunity Match Node Guide



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Overview

The Contact2Opportunity (C2O) Match Node is used to identify Opportunities in your Salesforce instance and match them to the routed Contact in the Contact Router. This node is specific to LeanData Contact Router. Once the Opportunity has been matched to the Contact record you can route the Contact record to the owner of the matching Opportunity. The Duplicate Contact Match Node also includes filters and Tiebreakers to help you identify the best Opportunity record if there are multiple potential Opportunities.



Example: *Sophia is the LeanData admin for Lighthouse Development. In her Contact Router flow, she needs to match the routed Contact to open Opportunities. She configures the C2O Node, with Filters and Tiebreakers to match to the right Opportunity. Using the Filters, she ensures that the routed Contacts are not matched to any Opportunities that are Closed.*

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 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

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

Condition	Target
Match	<input type="text" value="END OF FLOW"/> ▾
No Match	<input type="text" value="END OF FLOW"/> ▾

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 Match to Opportunity. 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 Contact record. In our example, we are excluding Opportunities that have a stage of Closed Won or Closed Lost (Stage = Closed Won,Closed Lost). This ensures that we will not match the routed Contact record to a closed opportunity.

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. Stage	eq...	Closed Won,Closed Lost

Do not filter

New condition

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 Contact 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 Matched Opportunities that are Closed, you could select the Stage, set the Operator to Equals, and select Closed Won and Closed Lost from the Value pull-down menu.

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
1.	<input checked="" type="radio"/> Value <input type="radio"/> Field	Stage	eq...	Closed Won, Closed Lost
2.	<input type="radio"/> Value <input checked="" type="radio"/> Field	Lead Source	no...	Lead Source

Rule Logic (Default)

1 AND 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 Contact record. For example, you can filter out any matched Opportunity where the Lead Source on the Opportunity does not equal the Lead Source on the routed Contact record. To do this, set the Matched Opportunity Field to Lead Source, set the Operator to Not equals, and then set the Contact Field to Lead Source. When you change the selector to Field, the label for the Value field will change to Contact 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 Contact 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 such as ((1 AND 2) OR 3).

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.	Stage	eq...	Closed Won,Closed Lost
<input type="radio"/> <input checked="" type="radio"/> 2.	Lead Source	no...	Lead Source

+ 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 Closed Opportunity OR have a Lead Source that does not equal the Lead Source on the routed Contact 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 Contact record. Tiebreaker rules are processed from the top down and are used to narrow the pool of possible Opportunities 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 Contact. The Contact2Opportunity 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)

Value / Field	Matched Opportunity Field	Operator	Value
1. <input checked="" type="radio"/> <input type="radio"/>	Closed	equals	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 Annual Revenue, Lead Score, 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 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.

Advanced Settings ▾

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

Condition	Target
Match	Merge Duplicate Contact
No Match	Match Node C2C

Summary

The Contact2Opportunity (C2O) Match Node is used to identify Opportunities in your Salesforce instance and match them to the routed Contact in the Contact Router. This node is specific to LeanData Contact Router. Using a combination of the Filters and Tiebreakers, you can match the best Opportunity to the routed Contact.

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

<https://leandatahelp.zendesk.com/hc/en-us/articles/360018921854>