LeanData Routing

Create Task Node Guide

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Overview

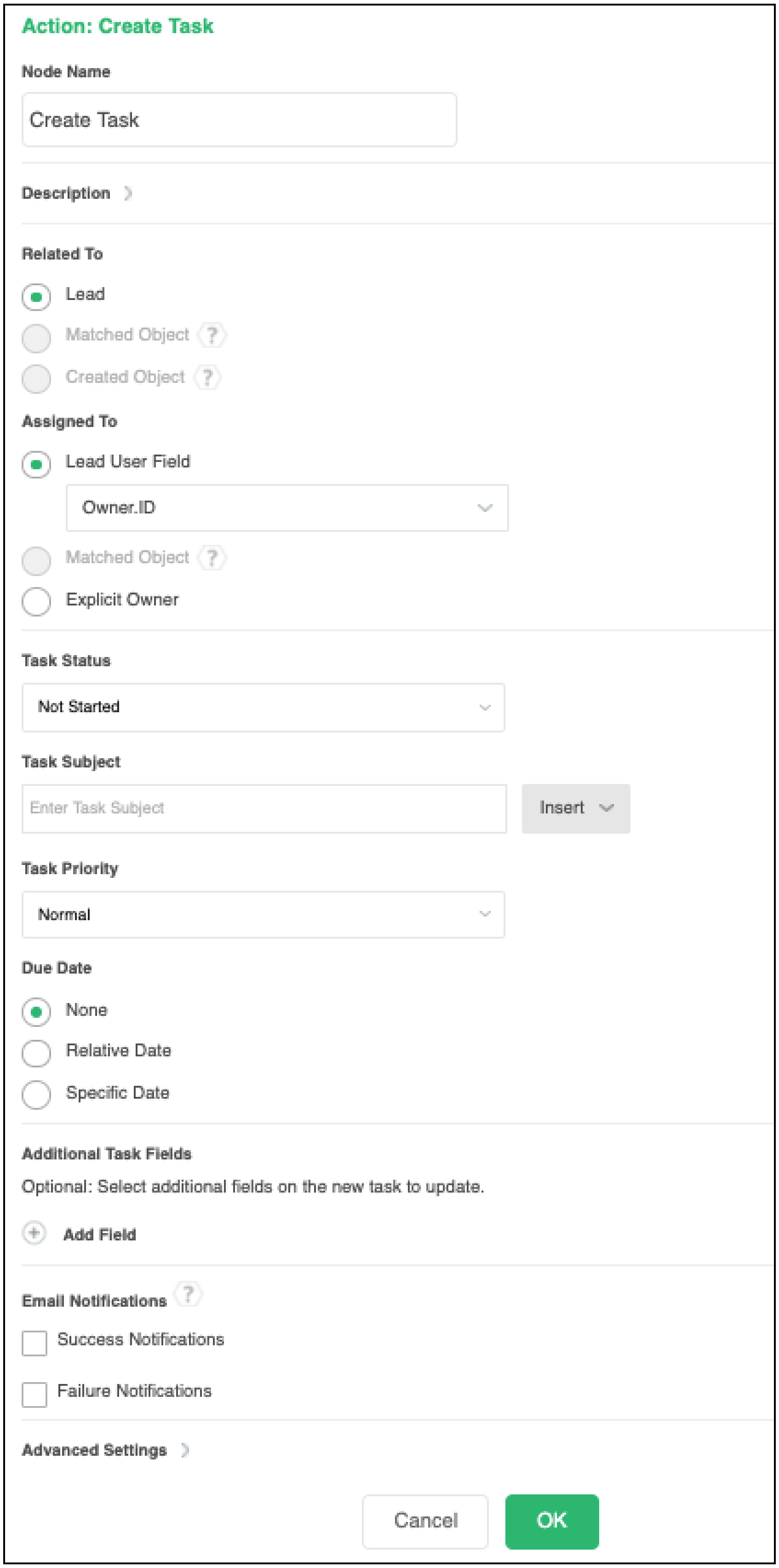
The Create Task Node is designed to create Tasks automatically as part of your Router flow. There are multiple options to configure how the Task should be created and assigned to an owner.

Example: *Daniel is the LeanData admin for Lighthouse Development. He is using Lead Router to automate their Lead management. Once a Lead has been matched to an Account and assigned to the right owner, he adds a Create Task Node to automatically create a Task to call the Lead and assigns it to the Assigned Owner. He can also use the Email Notification Settings on the node to automatically send an email notifying the assigned owner of the Task.*

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Related To
- Assigned To
- Task Status
- Task Subject
- Task Priority
- Due Date
- Additional Task Fields
- Email Notifications
- Advanced Settings


Action: Create Task
Node Name
Create Task
Description
Related To
Lead
Matched Object
Created Object
Assigned To
Lead User Field
Owner.ID
Matched Object
Explicit Owner
Task Status
Not Started
Task Subject
Enter Task Subject
Insert
Task Priority
Normal
Due Date
None
Relative Date
Specific Date
Additional Task Fields
Optional: Select additional fields on the new task to update.
Add Field
Email Notifications
Success Notifications
Failure Notifications
Advanced Settings
Cancel
OK

Node Name

By default, the Node Name is set to Create Task. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the Task. This will help others understand the purpose of the node. For our example, we would call this node, Call Lead for our use case.

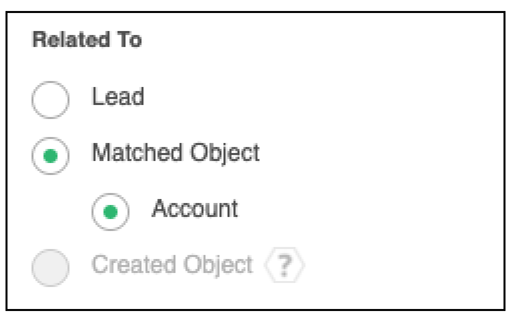
Description

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.

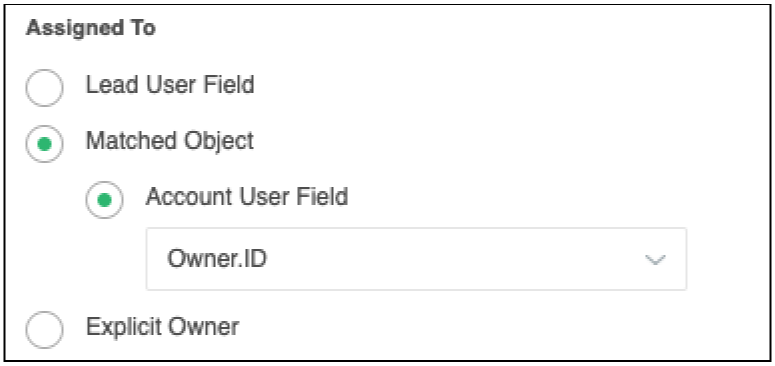
Related To

The Related To section gives you options for to indicate which record the created Task will be associated with. Options are:.

- **Lead:** This setting indicates that the new Task will be related to the Lead record.
- **Matched Object:** This setting indicates that the new Task will be related to a matched object. You have the option to select the matched object if there are multiple choices.
- **Created Object:** This setting indicates that the new Task will be related to an object created previously in the flow such as an Opportunity.



Assigned To
The Assigned To section gives you options to assign the new Task to a User in Salesforce.



The owner options are:

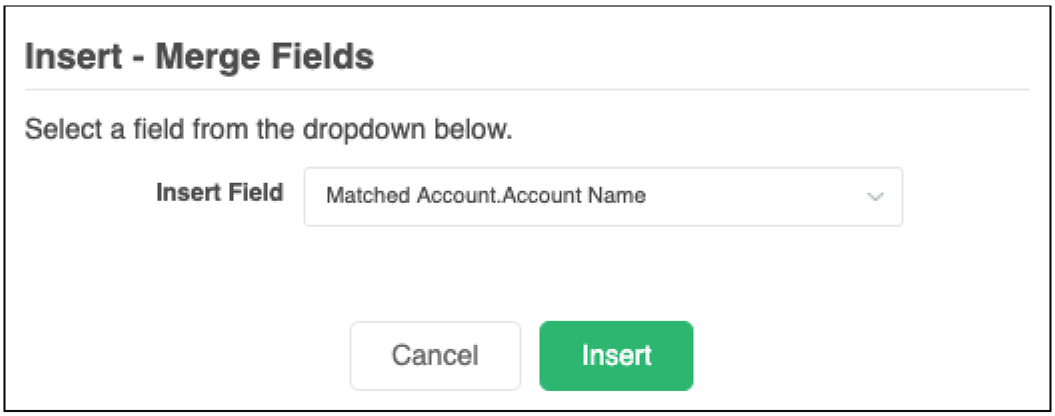
- **Lead User Field:** Use this option to assign the Task to a User on the Lead record. The drop-down lets you pick the field to be the source of the owner information. Options include:
    - Created By Id
    - Last Modified Id
    - Owner ID
- **Matched Object:** Use this option to assign the Task to a User on a Matched Object. Select the Type of Matched Object like Account. The drop-down lets you pick an owner for the new Task from the User fields on the Matched Object. Options include:
    - Created By Id
    - Last Modified Id
    - Owner ID
- **Explicit Owner:** Use this drop-down to assign to a specific owner.

Task Status
The Task Status field is a drop-down menu with options to set the status of the created Task. Options on the drop-down are:

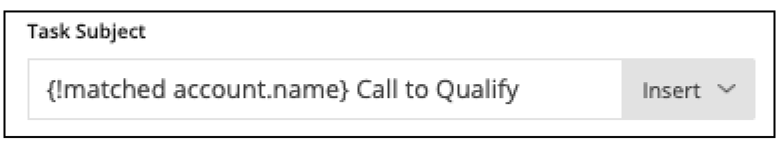
- Not Started
- In Progress
- Completed
- Waiting on Someone Else
- Deferred

Please Note: These are the default values. You can add or edit this list in Salesforce as needed. For information on editing this list please see this help article from Salesforce: https://developer.salesforce.com/docs/atlas.en-us.health_cloud.meta/health_cloud/admin_Task_status.htm

Task Subject
The Task Subject field gives you a place to create a subject for the Task record. You can enter a static value, insert a dynamic field value from a matched object, or a combination of both. The Merge Field feature gives you the ability to insert a field value from a matched object such as an Account or a Lead.



Example: *The admin Daniel wants to personalize the Task subject so he uses the Merge Field to insert the Account Name into the Task Subject with the text: Call to Qualify.*



Please Note: To use Account fields or fields from a related object, you must match the object previously in your Router Flow.

Task Priority
The Task Priority field is a drop-down menu with options to set the priority of the created Task. Options on the drop-down are:

- High
- Normal
- Low

Please Note: These are the default values. You can add or edit this list in Salesforce as needed. See the instructions above.

Due Date

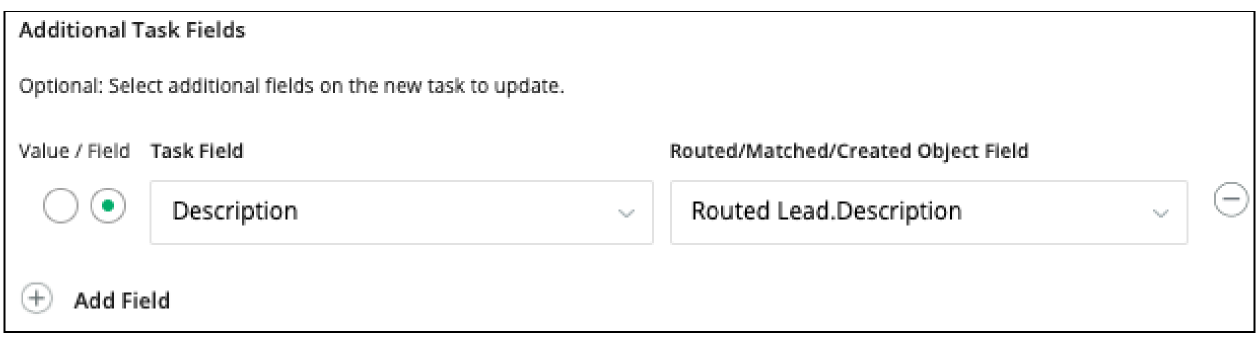
The Due Date field has options to set when the Task is due for completion. The date options are:

- **None:** Use this to leave the Due Date blank.
- **Relative Date:** Use this option to set the Due Date so a set number of days after the Task Creation Date. Example: if you enter 60 into the field the Task will be due 60 days after Task creation date.
- **Specific Date:** Use this option to set the Due Date to a specific date.

Additional Task Fields

The Additional Task Fields section gives you the ability to update additional fields on the created Task. When you add a new field in this section, you have the option to update the field with a new value entered into the node or you can populate the field with values from a field on a routed, matched, or created Object.

Example: *The admin Daniel, needs to have the description from the matched Lead copied to the description of the created Task. Using the Additional Task Fields options, he can use the field option and set the Routed Lead Description field as the source of the updated field on the Task. See the screenshot below.*



Use the Value/Field option to choose where to get the values to update the field on the created Task.

- **Value:** Use this option to choose a field and update it with the contents of the New Value field.
- **Field:** Use this option to choose a field from a matched object to be the source of the update to the field on a Task record.

Email Notifications

The email notifications allow you to configure how the node can notify Users of either a successful operation or a failure. You can select an existing template or create a new message using Compose Email. To build a Success or Failure Notification you must:

- Pick the recipients
- Select an existing template or compose an email

Please Note: The only difference between the Success Notification and the Failure Notification is what triggers the message. If you wish to use both, you will need to configure both types of messages to send.

Email Recipients

Use these settings to select Users to send a message that the node operation was either a success or failure:

- **Success Notifications:**
    - Use the Email Recipients section to pick the desired recipients of the notification.
        - **New Owner** - This option will send the notification to the new owner of the record.
        - **Previous Owner -** This option will send the notification to the previous owner of the record.
        - **Email Addresses -** This option will let you enter additional email addresses separated by a comma.
        - **Additional Recipients -** This option lets you send the notification to a User on the Lead or on the matched Account (if there is one previously matched in the flow).

Failure Notifications

- Use the Email Recipients section to pick the desired recipients of the notification.
  - **Email Addresses -** This option will let you enter additional email addresses separated by a comma.

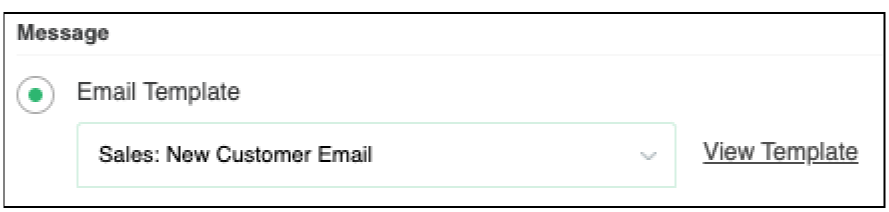
Message

In the Message section you will create the email message that the node sends out. You have 2 options:

- **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

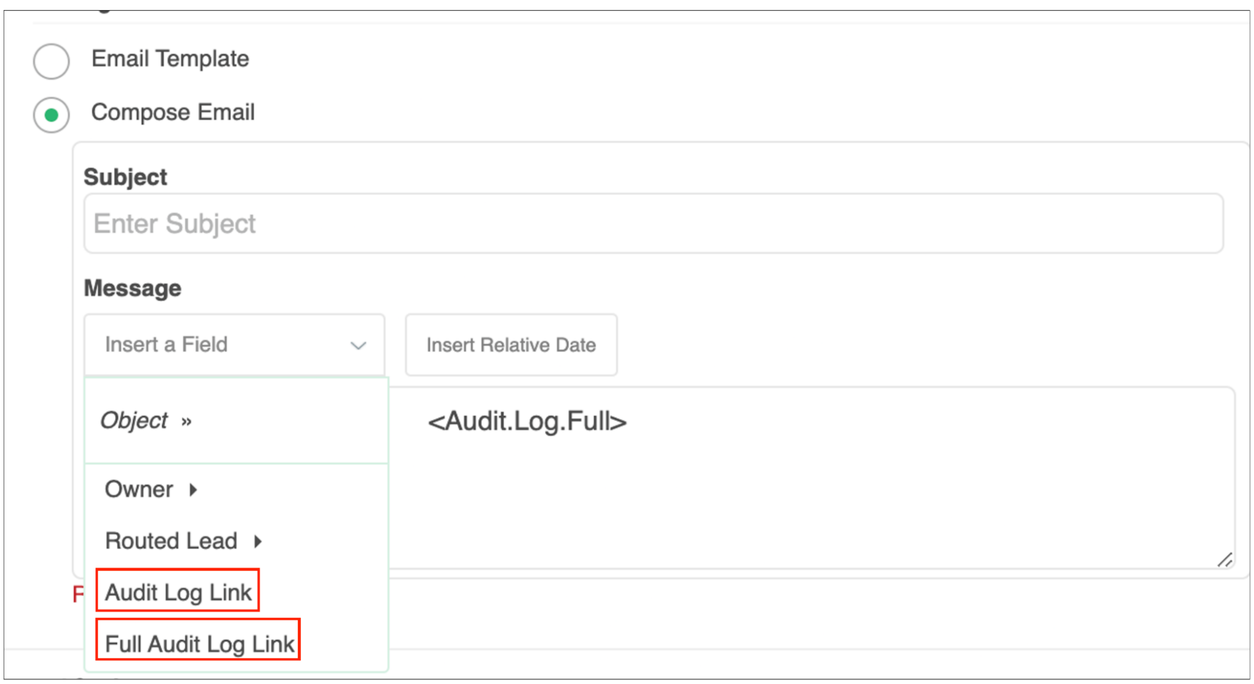
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



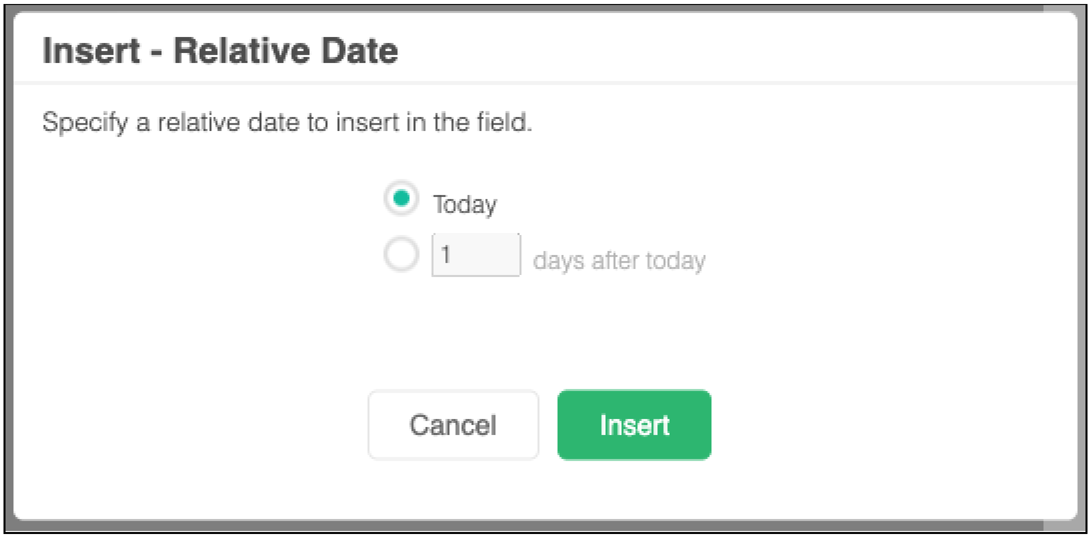
Compose Email

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.

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.

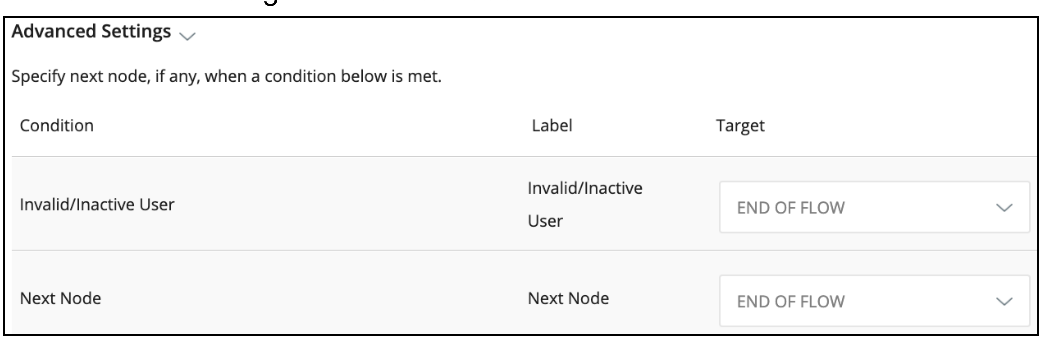


Use the Insert Relative Date to add the date the record was routed or a set number of days after the date the record was routed.



Advanced Settings
The Advanced Settings section gives you fallback options for the routed records and the ability to send the record to the next node of the flow as needed.

- **Invalid/Inactive User:** This is a fallback condition in the event that the selected Owner User is not active or invalid at the time of the routing. By default this will be set to End of Flow
- **Next Node:** This option allows the record to be routed to another node in the Router Flow after the Task has been created. This can include things like Converting the Lead into a Contact, updating a field on the Lead, etc. You can also set this node to End of Flow. This will stop routing records at this node instead of sending it to another node.



Summary

The Create Task Node will allow you create a Task and assign it automatically as part of your Router flow. There are options on the node to allow you to associate the Task with an object, assign the Task, set the Task Status, Subject, Priority, Due Date and update additional fields on the Task.

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