

LeanData Routing

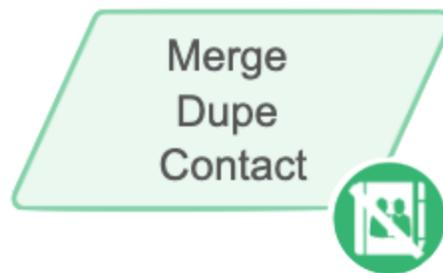
Merge Dupe Contact Node Guide



Overview	3
Merge Duplicate Settings	3
Customization	3
Email Notifications	5
Email Recipients	6
Message	7
Things to Know & Best Practices	10
Summary	11

Overview

The Merge Dupe Contact Node is designed to merge the routed Lead with an existing duplicate Contact in your Salesforce database. LeanData will first convert the routed Lead into a Contact and then merge the two Contacts. Before using a Merge Dupe Contact Node, there must be a duplicate identified previously in the router flow using the Duplicate Contact Match Node.



Example: Marcos is the LeanData administrator for Lighthouse Development. One of the requirements for the Router flow is to be able identify when the routed Lead is a duplicate of an existing Contact record. Marcos adds a Duplicate Contact Match Node to find any existing duplicate Contacts and then adds a Merge Dupe Contact Node to merge the Lead into the existing Contact.

Please Note: The routed Lead record is the record that is being merged into the existing duplicate Contact. The existing duplicate Contact record will be considered the master record.

Merge Duplicate Settings

The Merge Dupe Contact Node includes a link to manage your merging preferences on the Merge Duplicate Settings page. We recommend confirming your preferences before adding merging to your router flow.

For more information on merging duplicates please see our Merging Duplicates Guide:
<https://leandatahelp.zendesk.com/hc/en-us/articles/360019986774>

Customization

You have a number of options to configure the node:

- Node Name
- Description
- Merged Lead Status
- Email Notifications
- Advanced Settings

Action - Merge Dupe

Manage preferences in [Merge Duplicate Settings](#).

Node Name

Description >

To merge a Lead with a Contact, LeanData must convert the Lead first. Select a Converted Lead Status for the merged Lead.

Merged Lead Status: [View Lead Statuses](#)

Email Notifications

Success Notifications

Failure Notifications

Advanced Settings ▾

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

Condition	Label	Target
Invalid/Inactive User	Invalid/Inactive User	<input type="text" value="END OF FLOW"/>
Queue Lead Owner	Queue Owner	<input type="text" value="END OF FLOW"/>

Node Name

By default, the Node Name is set to Merge Dupe Contact. You can change this label to anything you need. We strongly recommend giving this node a meaningful name.

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.

Merged Lead Status

When merging the Lead into an existing Contact, LeanData will first convert the Lead into a Contact. Per Salesforce requirements, you must set a Converted Lead Status on the Lead before it can be converted. Use the Merged Lead Status pull-down to select a converted status to apply to the converted Lead record.

To merge a Lead with a Contact, LeanData must convert the Lead first. Select a Converted Lead Status for the merged Lead.

Merged Lead Status: [View Lead Statuses](#)

If you want to view/edit your Lead Statuses use the link “View Lead Statuses” next to the Merged Lead Status pull-down. The Lead Setup page in Salesforce will open in a new tab.

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:

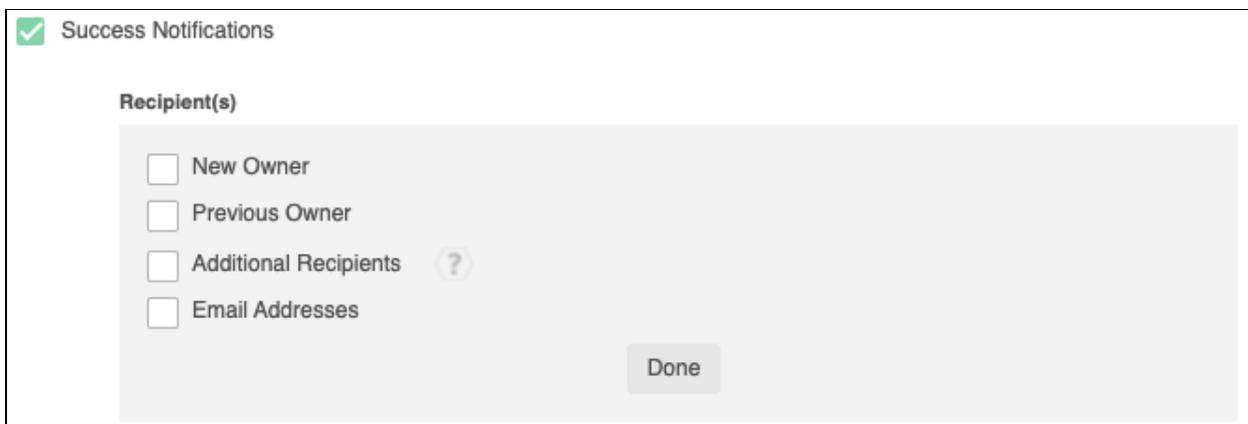
- Pick the recipients
- Select an existing template or compose an email

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:

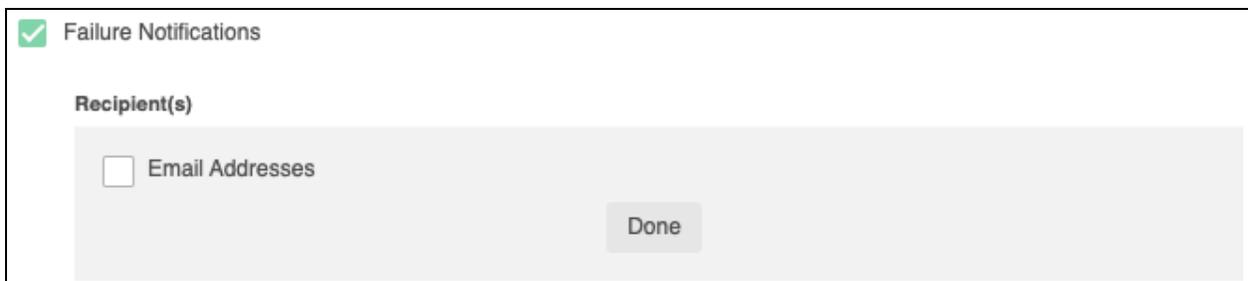
- **Success Notifications:**
 - Use the Email Recipients section to pick the desired recipients of the notification.
 - **New Owner** - This option will send the notification to the new owner of the record.
 - **Previous Owner** - This option will send the notification to the previous owner of the record.
 - **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).



The screenshot shows a configuration panel for "Success Notifications". At the top left, there is a green checkmark icon followed by the text "Success Notifications". Below this, the section is titled "Recipient(s)". There are four options, each with an unchecked checkbox: "New Owner", "Previous Owner", "Additional Recipients" (which has a small question mark icon to its right), and "Email Addresses". At the bottom right of the panel, there is a grey button labeled "Done".

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.



The screenshot shows a configuration panel for "Failure Notifications". At the top left, there is a green checkmark icon followed by the text "Failure Notifications". Below this, the section is titled "Recipient(s)". There is one option with an unchecked checkbox: "Email Addresses". At the bottom right of the panel, there is a grey button labeled "Done".

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

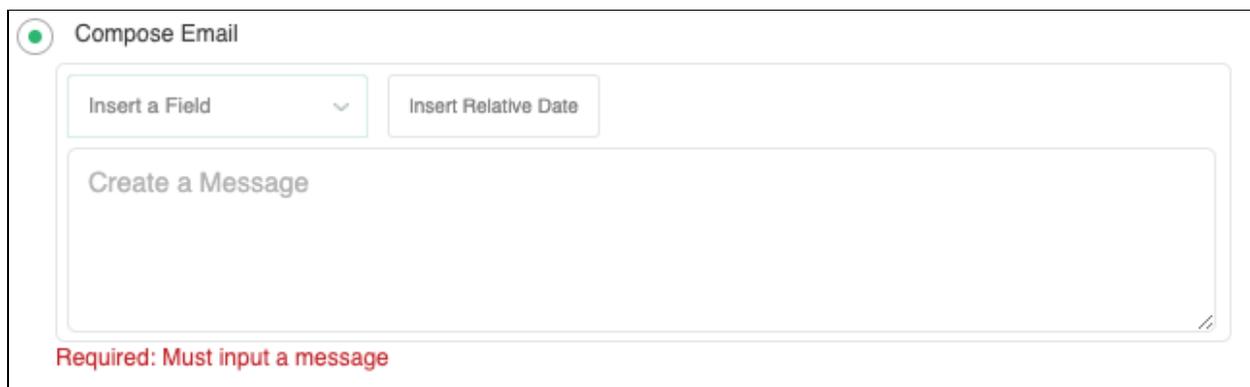
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



The screenshot shows the 'Message' section of the interface. The 'Email Template' option is selected with a radio button. Below it, a dropdown menu displays 'Sales: New Customer Email' with a downward arrow. To the right of the dropdown is a link labeled 'View Template'.

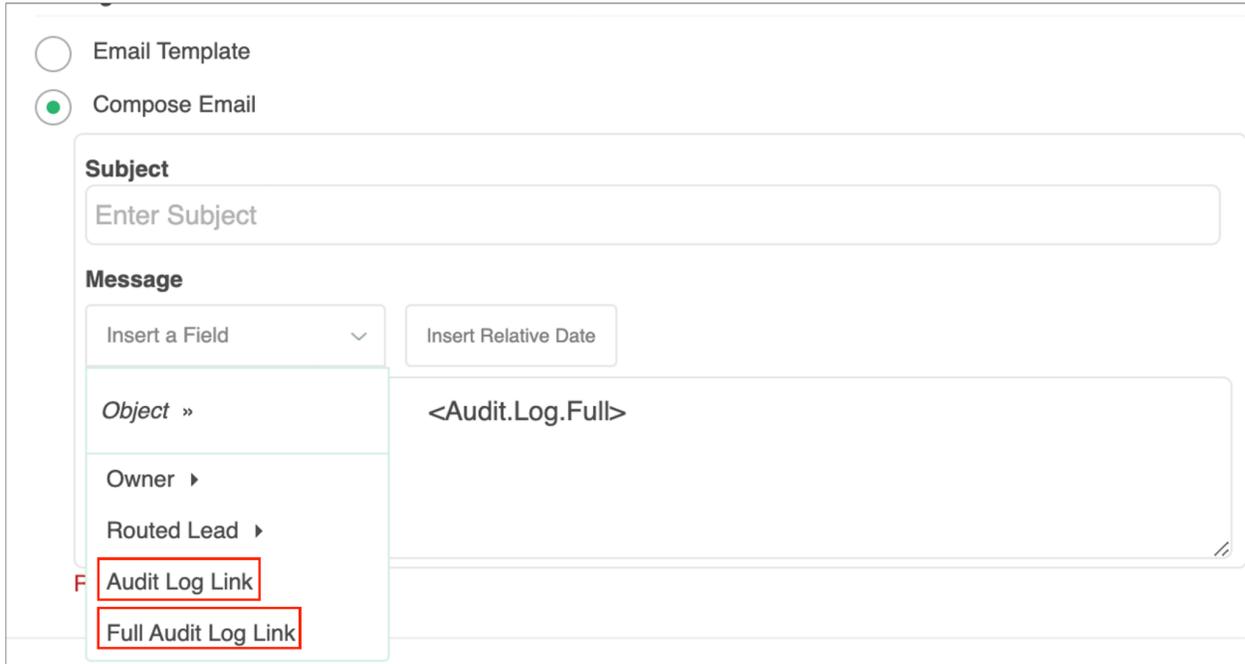
Compose Email

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.

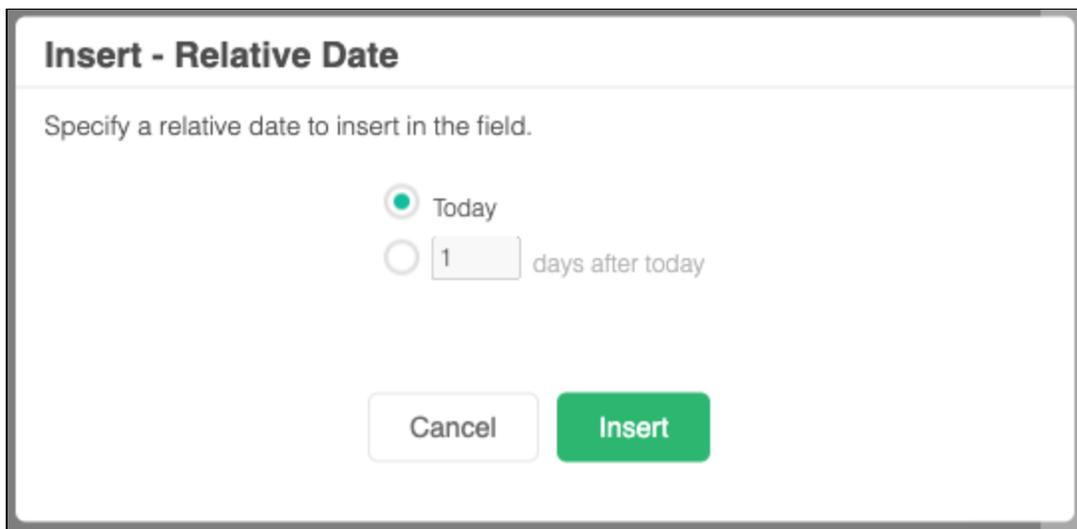


The screenshot shows the 'Compose Email' section. The 'Compose Email' option is selected with a radio button. Below it are two buttons: 'Insert a Field' with a dropdown arrow and 'Insert Relative Date'. A large text area below these buttons contains the placeholder text 'Create a Message'. At the bottom 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.



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.

- **Invalid/Inactive User** - If the incoming Lead is owned by an inactive or invalid User when it enters this node, the merge will fail and the Lead will be routed through the Invalid/Inactive User node edge.
- **Queue Lead Owner** - If the routed lead is owned by a queue when it hits the Merge Dupe Contact node, the node will not be able to convert the Lead into a contact to merge into the existing Contact. The merge will fail and the Lead will be routed through the Queue Lead Owner node edge. You can then route the Lead to a Send Notification node to alert someone that there is a queue owned lead.

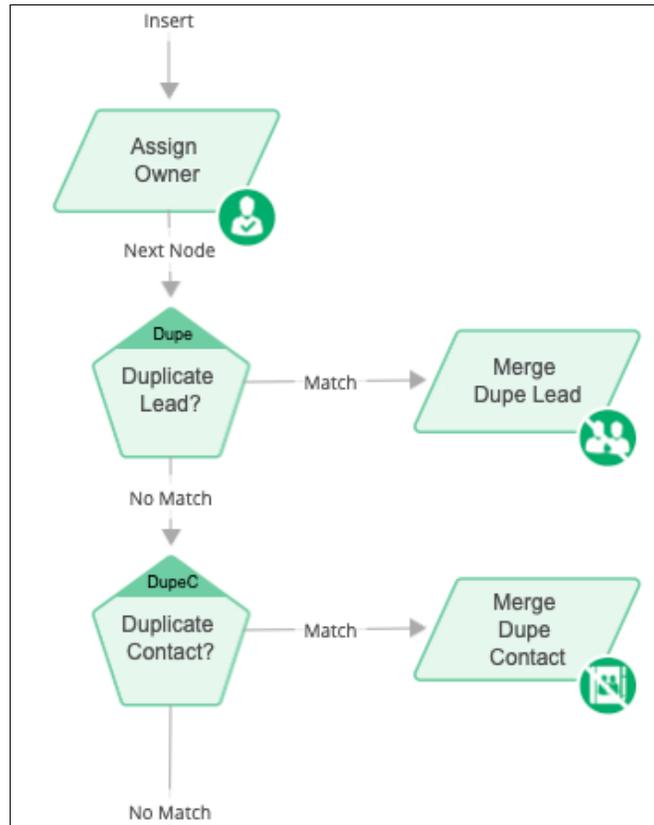
Advanced Settings ▼

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

Condition	Label	Target
Invalid/Inactive User	Invalid/Inactive User	END OF FLOW ▼
Queue Lead Owner	Queue Owner	END OF FLOW ▼

Things to Know & Best Practices

- If you are using native Salesforce Contact validation requiring certain fields to be populated, a lead to contact merge process may fail if the lead is missing the required information to be converted into a contact and then merged.
- We recommend checking for queue owned Leads before routing a Lead to the Merge Dupe Contact node and assigning them to a User so that when the routed Lead hits the merge node, the merge will be successful.
- You can stack the Merge Dupe Lead and Merge Dupe Contact nodes in your Router Flow to check for duplicate Leads and Contacts and merge them into existing records.
- You should always test your Merge Duplicates settings thoroughly before launching in production. You can do this by running a 1x routing job in a sandbox instance and reviewing the results in the LeanData logs. **Merge actions cannot be undone.**
- Other duplicate detecting apps may interfere with LeanData Merge Duplicates, including native Salesforce duplicate detection. If you are using LeanData Merge Duplicates feature you should beware of or disable other duplicate management apps to avoid unexpected behavior.



Summary

The Merge Duplicate Contact Node is used to convert the routed Lead into a Contact then merge the new Contact into the existing duplicate Contact record using your merging preferences. Before using a Merge Dupe Contact Node, there must be a duplicate identified previously in the router flow using the Duplicate Contact Match Node.

For more information on merging duplicates please see our Merging Duplicates Guide: <https://leandatahelp.zendesk.com/hc/en-us/articles/360019986774>

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