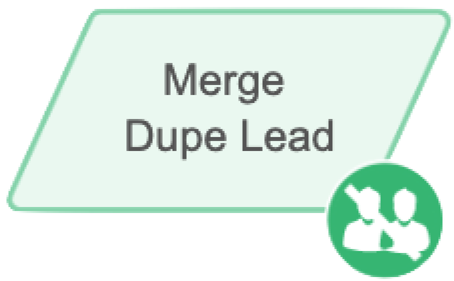
LeanData Routing

Merge Dupe Lead Node Guide

Overview

The Merge Dupe Lead Node is designed to merge the routed Lead with an existing duplicate Lead in your Salesforce database. Before using a Merge Dupe Lead Node, there must be a duplicate identified previously in the router flow using the Duplicate Match Node.



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

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

Merge Duplicate Settings

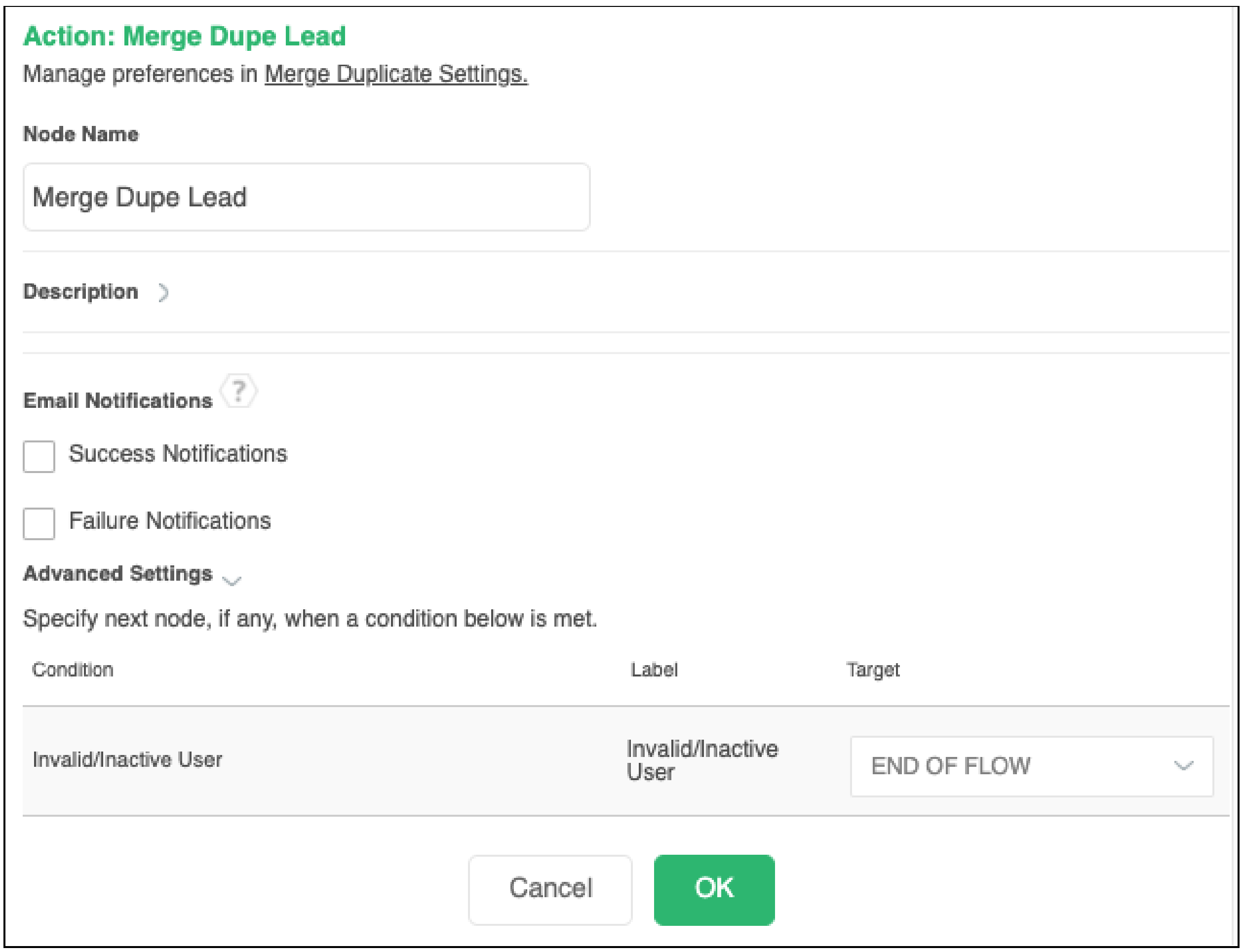
The Merge Dupe Lead Node includes a link to manage your merging preferences on the Merge Duplicate Settings page. We recommend confirming your preferences before adding merging to your router flow.

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
- Email Notifications
- Advanced Settings



Node Name
By default, the Node Name is set to Merge Dupe Lead. 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.

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

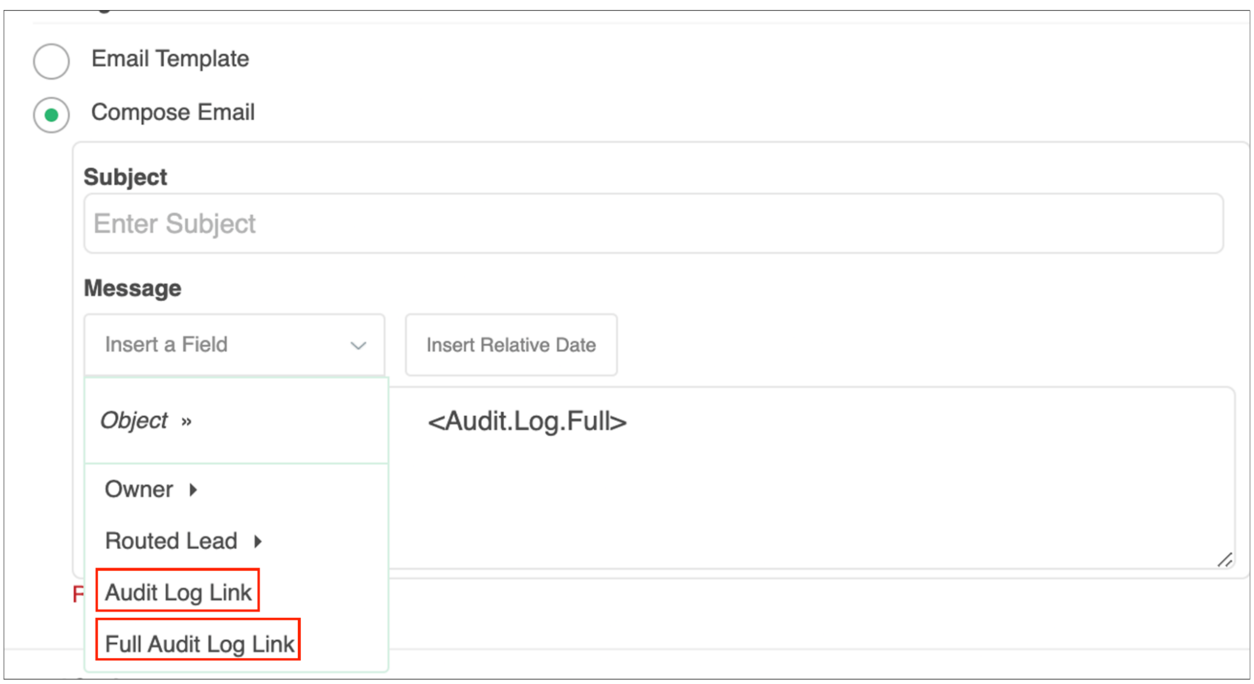
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.


Message
Email Template
Sales: New Customer Email
View Template

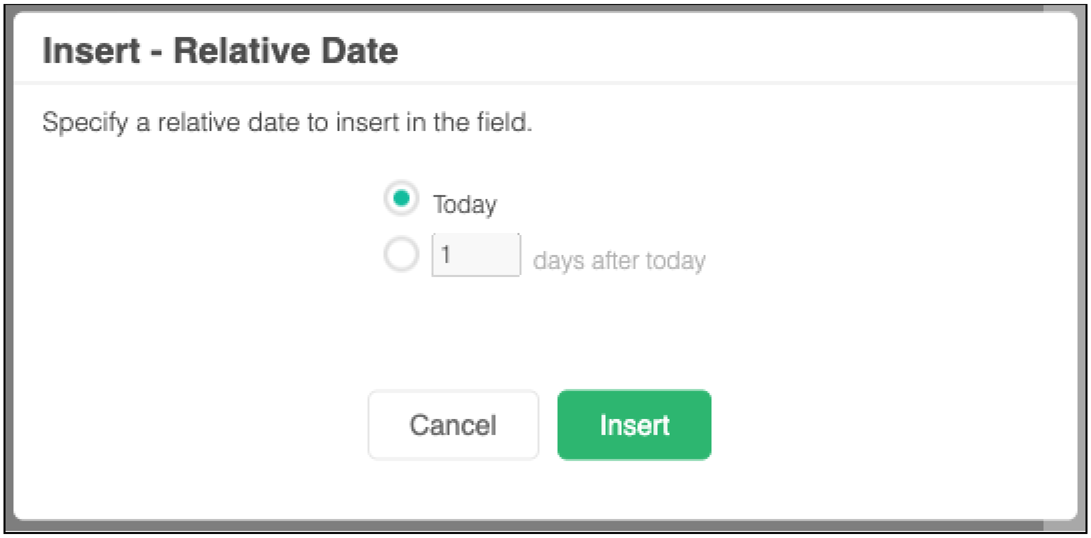
Compose Email

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.

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.

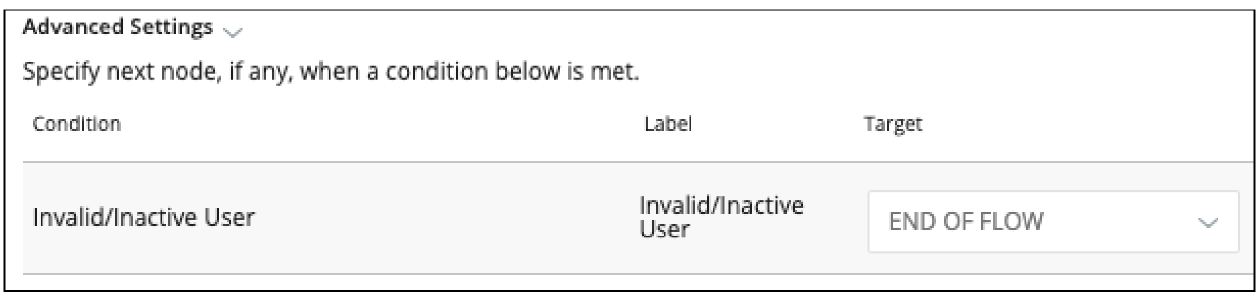


Use the Insert Relative Date to add the date the record was routed or a set number of days after the date the record was routed.



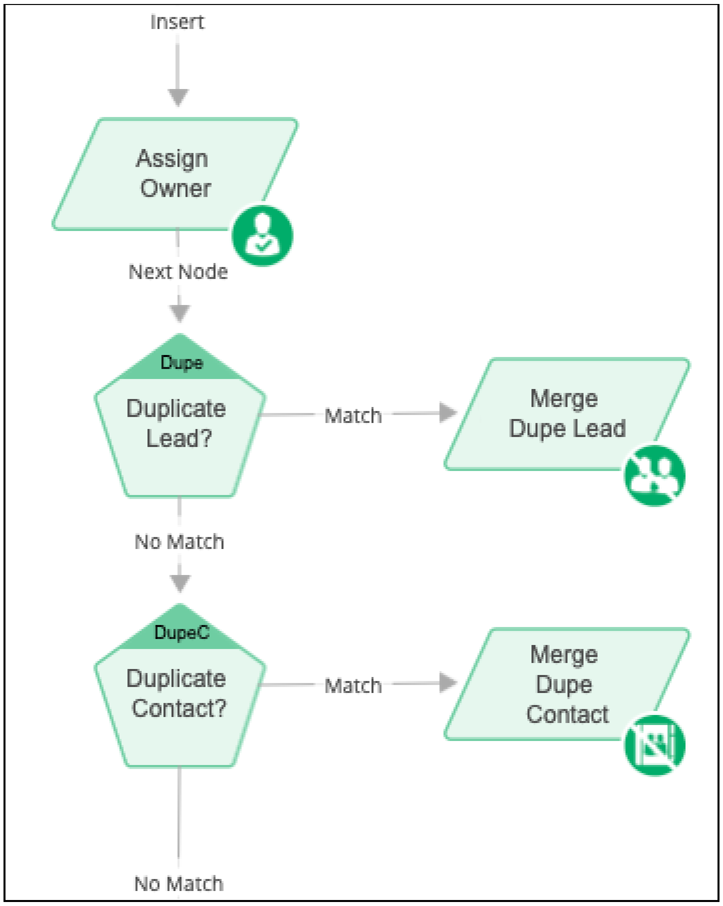
Advanced Settings
The Advanced Settings section gives you a fallback option for the routed records.

- **Invalid/Inactive User** - if the incoming Lead is owned by an inactive or invalid User, the merge will fail and the Lead will be routed through the Invalid/Inactive User node edge.



Things to Know & Best Practices

- 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. See the next page for a screenshot that illustrates this point.
- 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 Lead Node is used to merge the routed Lead into the existing duplicate Lead record using your merging preferences. Before using a Merge Dupe Lead Node, there must be a duplicate identified previously in the router flow using the Duplicate Lead 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