LeanData Routing

Opportunity Router Guide

Overview 3

General FlowBuilder Actions 3

- Adding & Editing Graphs 4
- Graph Locking 4
- Deploying a Graph 5

General Node Actions 7

- Adding Nodes 7
- Deleting Nodes 8
- Editing Nodes 8
- Copying Nodes 9
- Connecting Nodes 10
- Node Colors 11
- Multi-Node Actions & Shortcuts 12

Node Guides 12

FAQs 12

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Overview

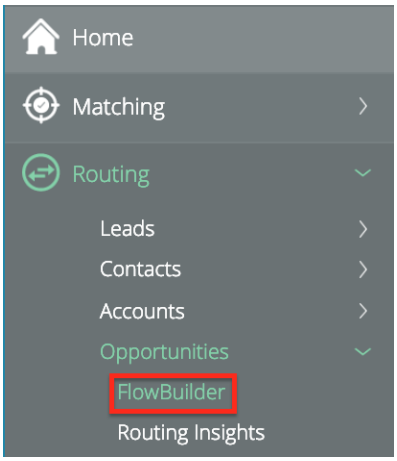
LeanData Opportunity Router gives organizations a visual interface (FlowBuilder) to create and manage Opportunity routing logic, ensuring that Opportunities get assigned to the appropriate owner automatically. Opportunity Router allows you to create routing logic based on Opportunity criteria, as well as any associated records such as Accounts.

In addition to assigning Opportunities to the correct owners, Opportunity Router offers you powerful actions such as task creation, notifications, round robin functionality, and more.

General FlowBuilder Actions

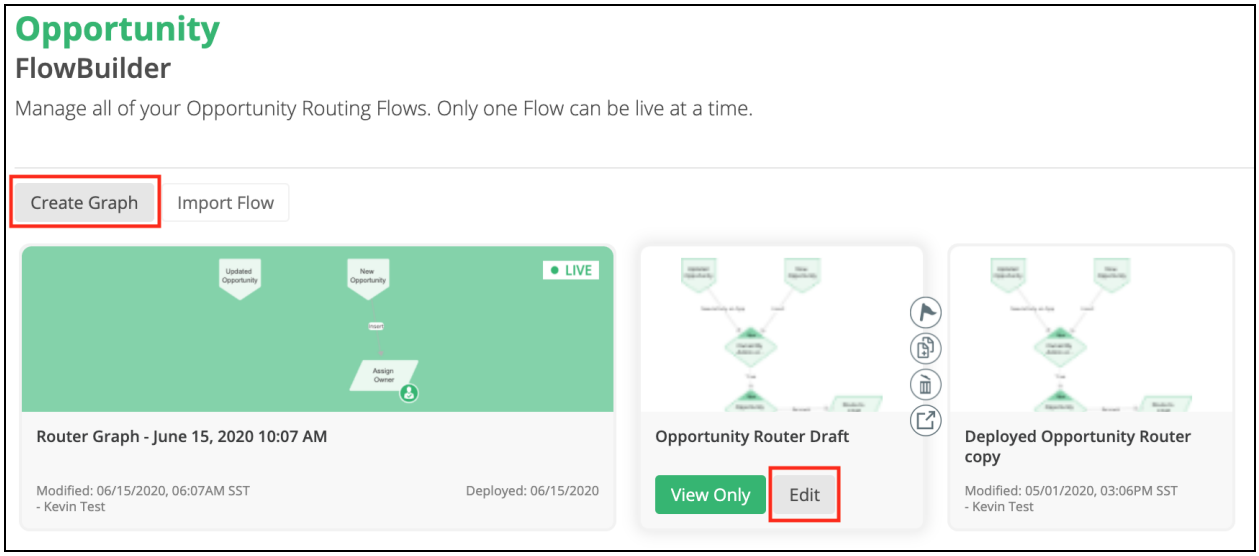
Accessing FlowBuilder

1. Click on the LeanData tab from Salesforce.
2. Within LeanData click **Routing** → **Opportunities** → **FlowBuilder**



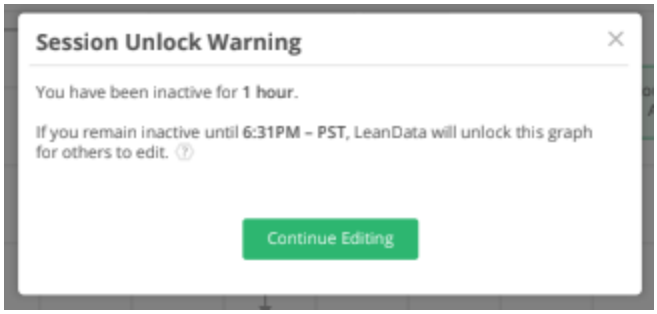
Adding & Editing Graphs

You can create a new graph by clicking the "**Create Graph**" button on the main FlowBuilder page, or you can edit an existing graph by hovering over its tile and clicking the "Edit" button that appears on the tile.



Graph Locking

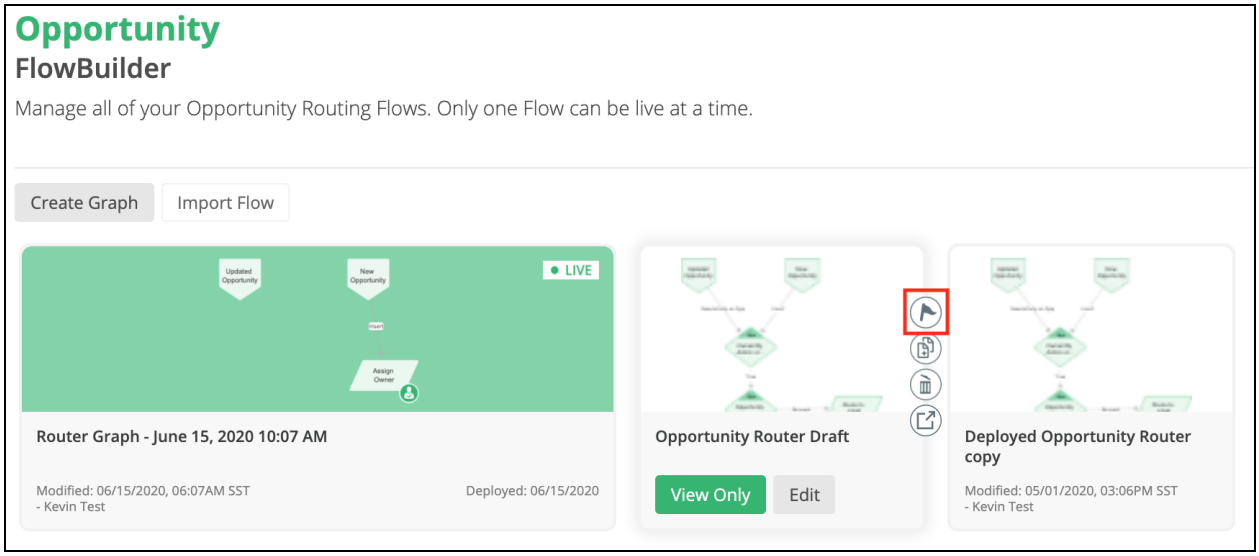
When you have a graph open for editing, the graph will be locked to others so that two people cannot edit a graph at the same time. If there is no activity for 2 hours on the locked graph, it will automatically be released so that it can be edited, by anyone with access to the graph.



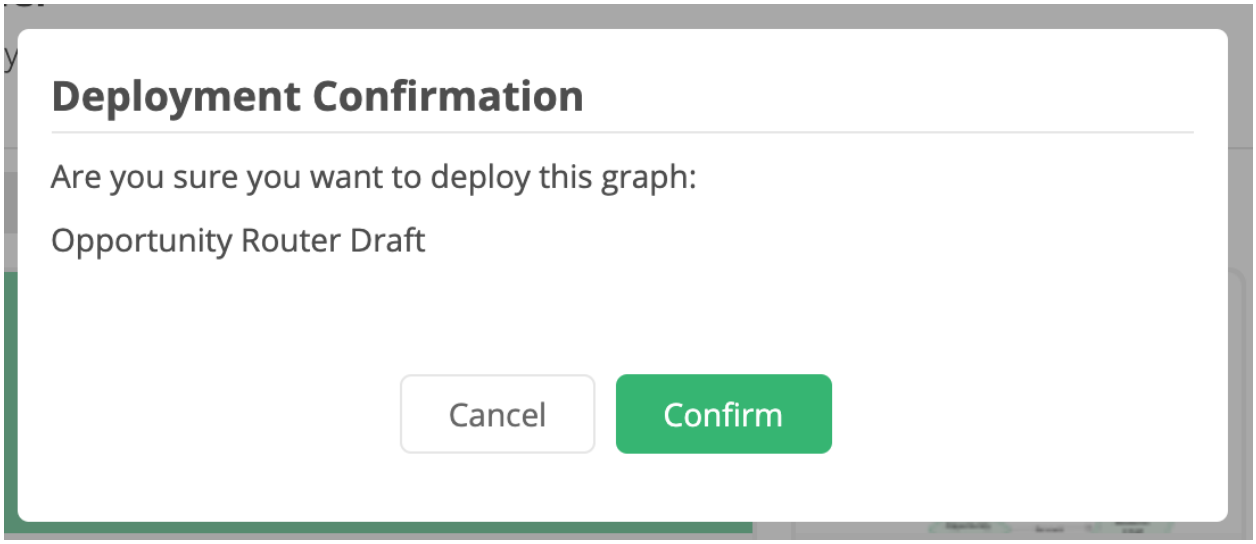
Example: *Admin Melissa opens a graph to edit, but gets pulled into back-to-back meetings and activities before finishing their work. But Admin John needs to make edits! The graph will become auto-unlocked for John to modify after Melissa has been inactive for two hours.*

Deploying a Graph

To deploy a graph, hover over the graph you wish to deploy, then select the flag icon to deploy that graph.

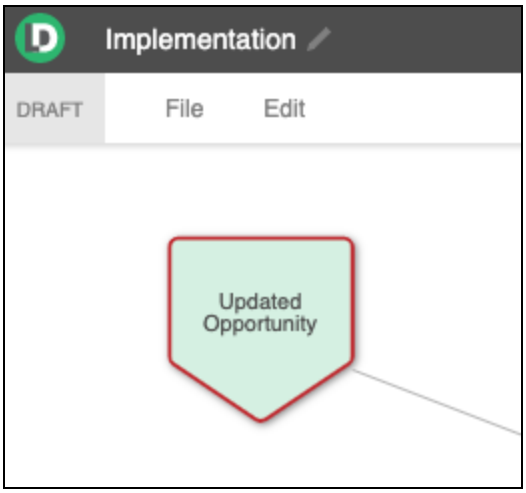


You will get a Deployment Confirmation. Select **Confirm** to deploy the deployment. If you already had a different graph deployed, it will automatically be deactivated.

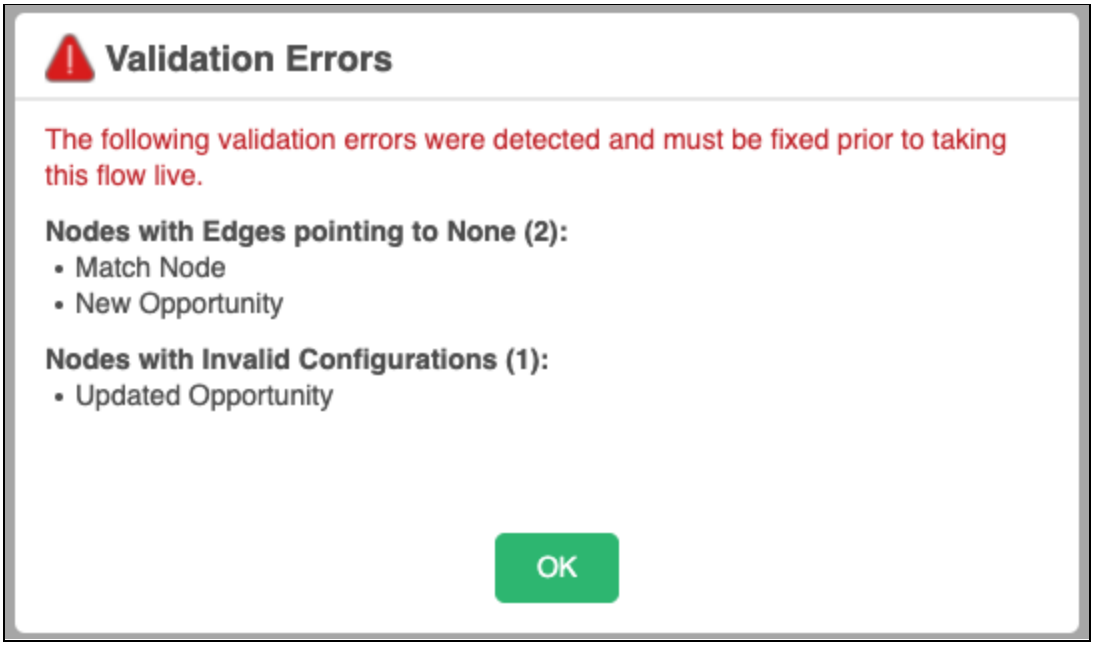


Please Note: Only valid graphs (graphs without errors) are eligible for deployment

When you open a graph, LeanData will validate the graph and if your graph is showing validation errors, the nodes with issues will be outlined in red.



Clicking on the red triangle in the upper left corner of the Graph Editor will open a pop-up window with a list of the validation issues that must be resolved before deploying the graph.



General Node Actions

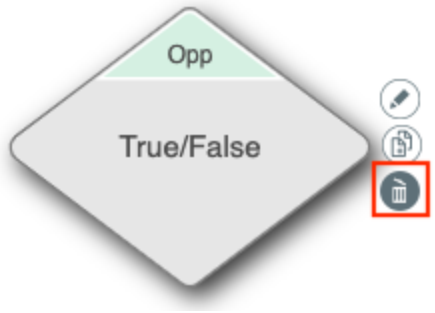
Once within a graph, you can customize your Opportunity routing logic utilizing nodes that will contain the different matching functions, decision criteria, or actions you wish to take.

Adding Nodes

Once within a graph, to add a node, use the node bar in the top right corner and hover over the node options and either click on the node you wish to add or drag it into the main area.

Deleting Nodes

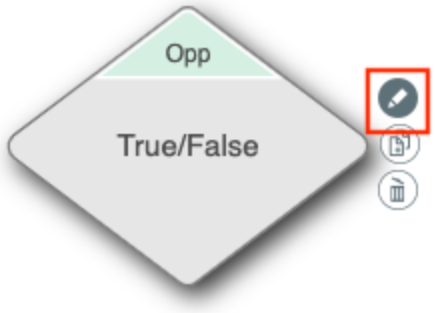
To delete a node, single click on the node you wish to delete, then click the Garbage can icon to delete the node.



You can also Delete nodes using the Menu Bar at the top of the page by selecting the node(s) you wish to delete, and then either hitting the Trash icon or selecting **Delete** from the **Edit** menu at the top. You can also use the DELETE key on your keyboard.

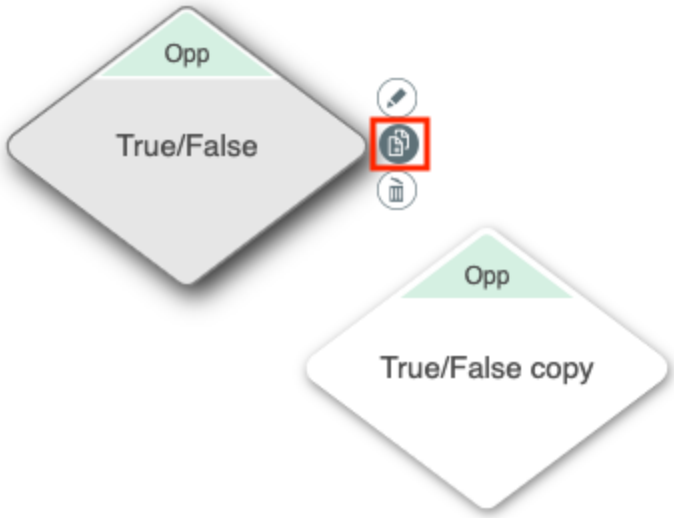
Editing Nodes

To edit a node, single click on the node you wish to edit, then select the Pencil icon to edit the node or you can double-click on the node itself to edit the conditions within the node.



Copying Nodes

To copy a node, single click on the node you wish to copy, then select the Copy icon to create a copy of that node. A copy of your node, including the conditions within it, will appear.



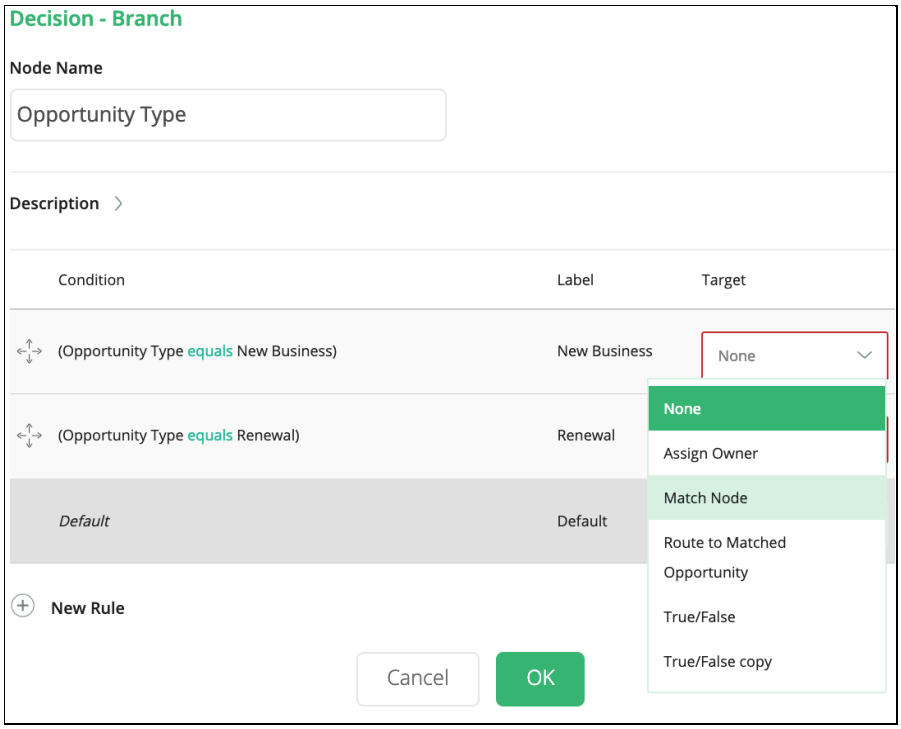
You can also use the icons in the menu bar at the top of the page or the options in the **Edit** menu, as well as keyboard shortcuts to **Copy** (CTRL/CMD+C) and **Paste** (CTRL/CMD+V) the node(s) you wish to duplicate.

You can also copy nodes to be pasted into other graphs. Click on the desired node to select it, then select **Copy** from the **Edit** Menu. Open the target graph and select **Paste** from the **Edit** menu to paste the copied nodes into the graph.

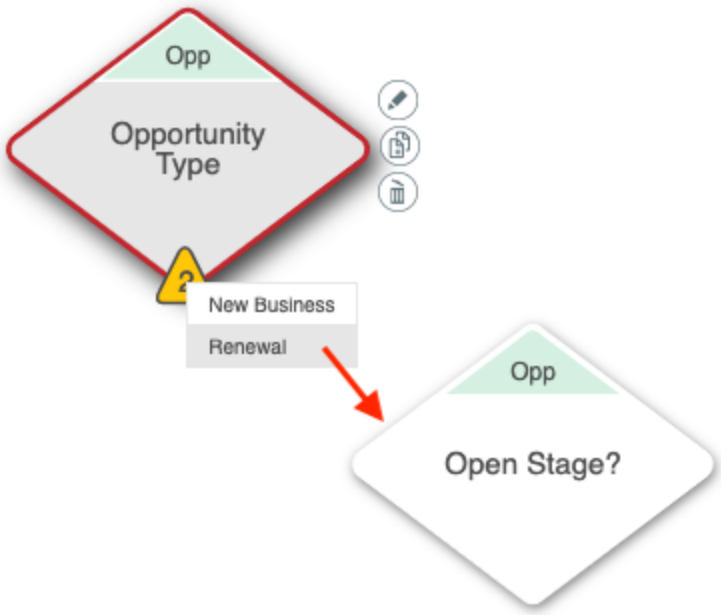
Connecting Nodes

You can Connect nodes in one of two ways:

1. Open a node and select the "**Target**" through the dropdown next to the condition or outcome you wish to assign. Use the search functionality to narrow the scope of the results. If you want Opportunity processing to stop at your selected node, simply select "**End of Flow**".



2. Click on the yellow triangle and drag that branch to the next node you wish to utilize if that condition is met.



Node Colors

You can give your nodes different colors to help you organize your Routing graph, and more easily delineate different sections or functions within your Routing Graph. The color of a node will have no bearing on the functionality of the node and is only used to visibly distinguish nodes.

To change the color of new nodes you create, select your desired color from the node color palette at the top of the page.

New nodes will have the selected color until you select a different color from the palette. Copied nodes will keep the color of the original node.

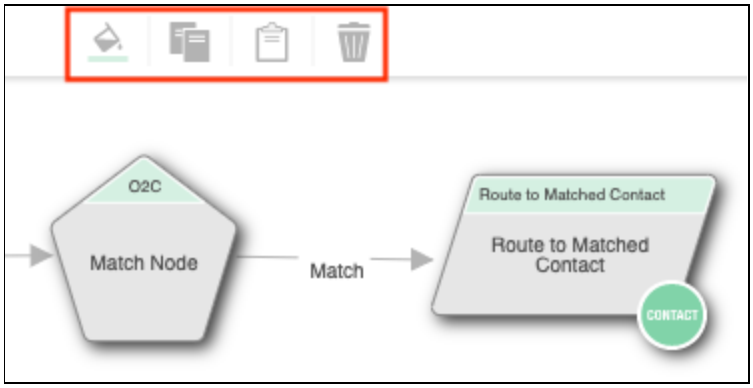
To change the color of existing nodes on your graph, select the node(s) you would like to change, then pick the desired color from the palette, and the selected nodes will change to the selected color.

Multi-Node Actions & Shortcuts

If you need to select multiple specific nodes, you can hold **Cmd** (Mac) or **Ctrl** (PC) and then click on the different nodes you wish to select.

Alternatively you can also select multiple nodes by holding down the **Shift** key and dragging your cursor to highlight an entire area. All nodes that fall into the highlighted area will be selected.

Once you have selected your desired nodes, you can either use system **Copy** (Cmd/Ctrl+C), **Paste** (Cmd/Ctrl+V), or **Delete** (Delete Key) shortcuts, or you can use the buttons in the menu at the top of your screen, to perform the desired actions



Node Guides

There are many nodes that are available to you in LeanData Router. For more detailed information on these nodes and how they function please see our Node Guides in the LeanData Help Center.

For additional help and assistance, please submit a ticket to LeanData Support.

FAQs

Can I use an Account field to trigger a Route on Update condition to re-route an Opportunity?

You can only use fields that are located on the Opportunity object itself to trigger an Opportunity re-route. So while we can use changes to the Account Lookup field itself (on

the Opportunity object), we cannot use any changes on a field located on the associated Account record to trigger an Opportunity re-route.

Is it possible to de-dupe Opportunities?

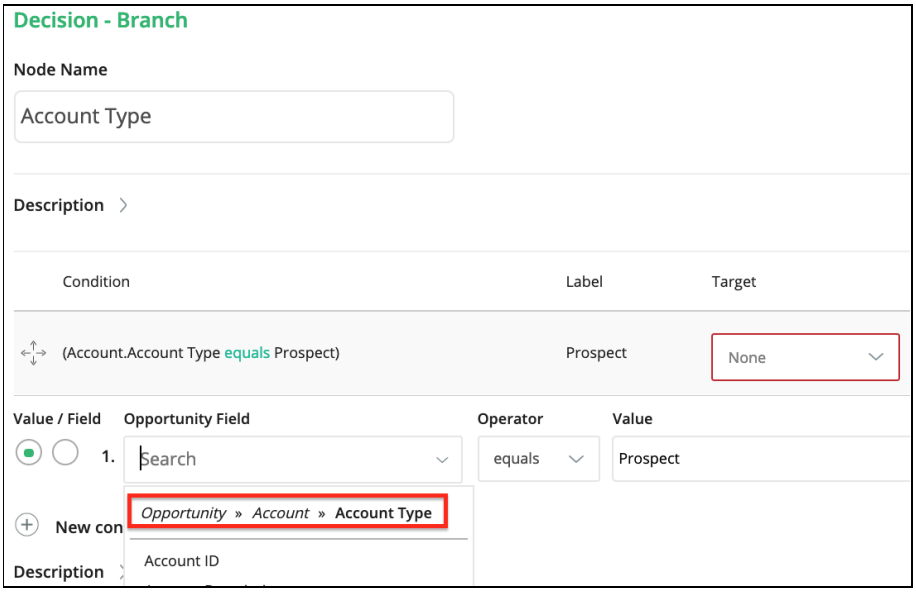
Opportunity Router does not de-dupe Opportunity to Opportunity.

Is it possible to match orphan Opportunities to matched Accounts?

No, Opportunity Router can only route Opportunities to Round Robin groups, explicit owners, or to user fields on an already associated Account.

Is it possible to match Opportunities to Opportunities on other Accounts?

No, Opportunity to Opportunity match only looks for Opportunities on the Account to which the Opportunity is associated

In decision nodes, can we access fields on the Account to route Opportunities?

Yes, in decision nodes you can access fields on the associated Account record, or any record to which the Opportunity has a Lookup relationship.