

LeanData Routing

Contact Router Guide



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Overview

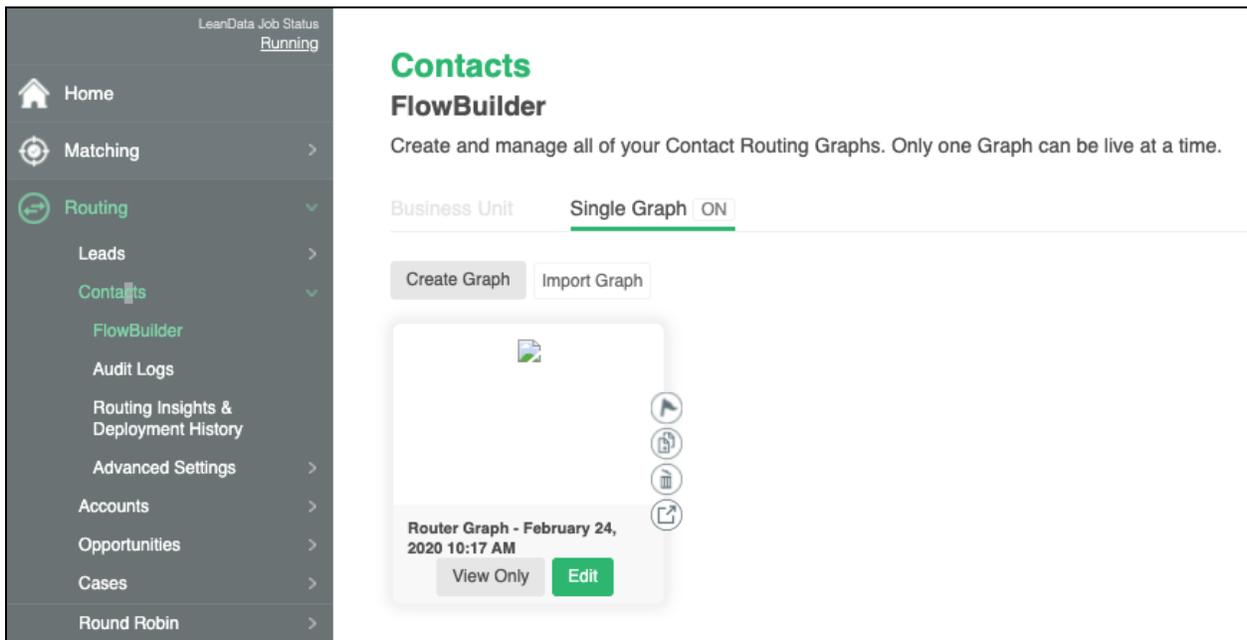
LeanData Contact Router gives organizations a visual interface (FlowBuilder) to create and manage Contact routing logic, ensuring that Contacts get assigned to the appropriate owner automatically. Contact Router allows you to create routing logic based on Contact criteria, as well as any associated records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

In addition to assigning Contacts to the correct owners, Contact 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** → **Contacts** → **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.

Contact FlowBuilder

Manage all of your Contact Routing Flows. Only one Flow can be live at a time.

Create Graph Import Flow

Contact Router Example

Modified: 09/07/2020, 10:47AM SST - Kevin Test Deployed: 09/07/2020

LIVE

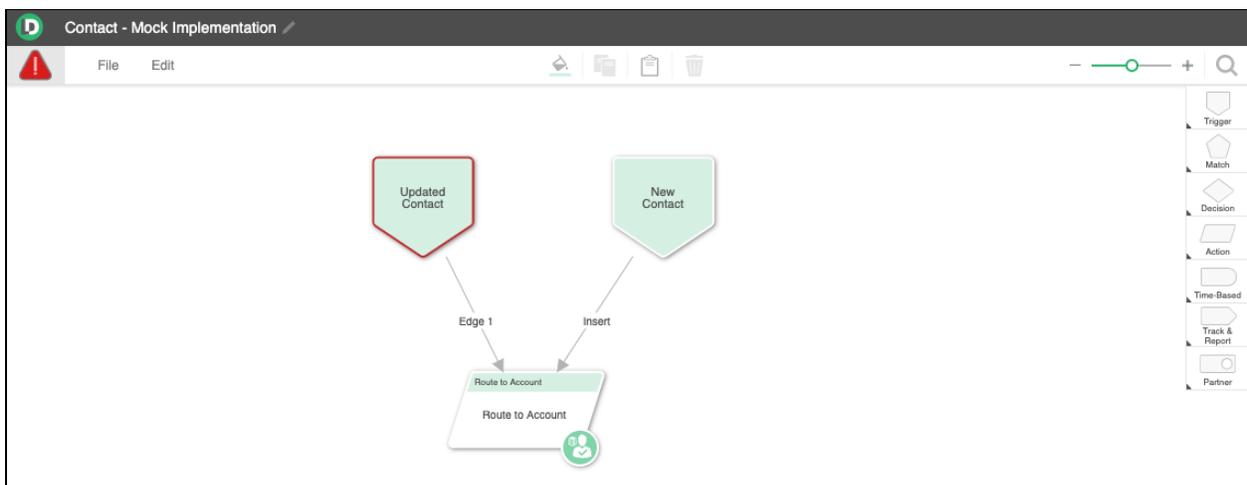
New Contact Router Flow

View Only **Edit**

Router Graph - September 3, 2019 4:05 PM copy

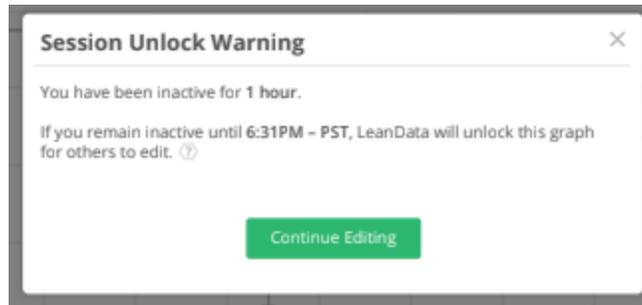
Modified: 09/03/2019, 12:06PM SST - Kevin Test

Please Note: The Graph Editor opens a new graph or an existing one in a new browser tab to give you a full screen view of your graph.

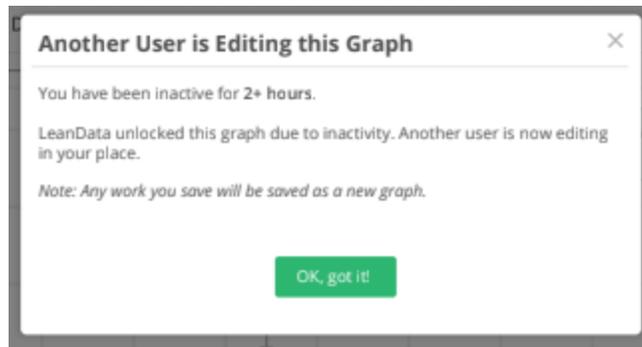


Graph Locking

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.*

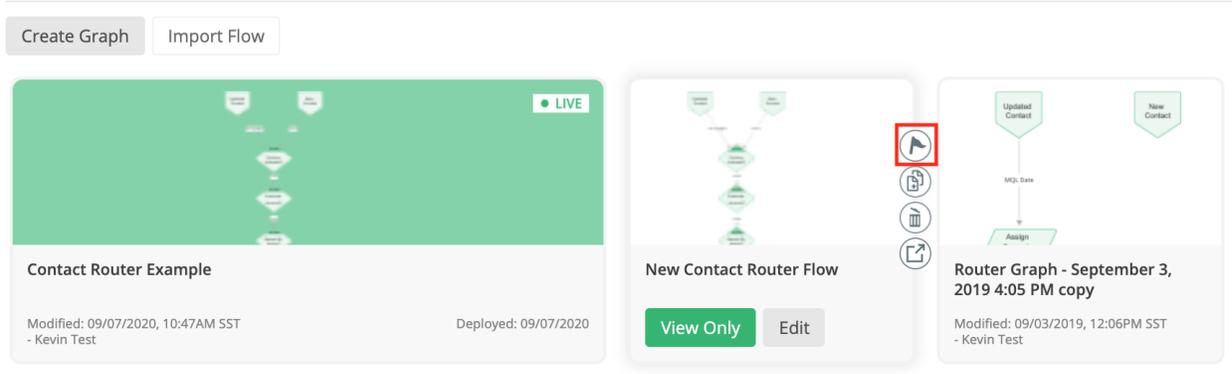


Deploying a Graph

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

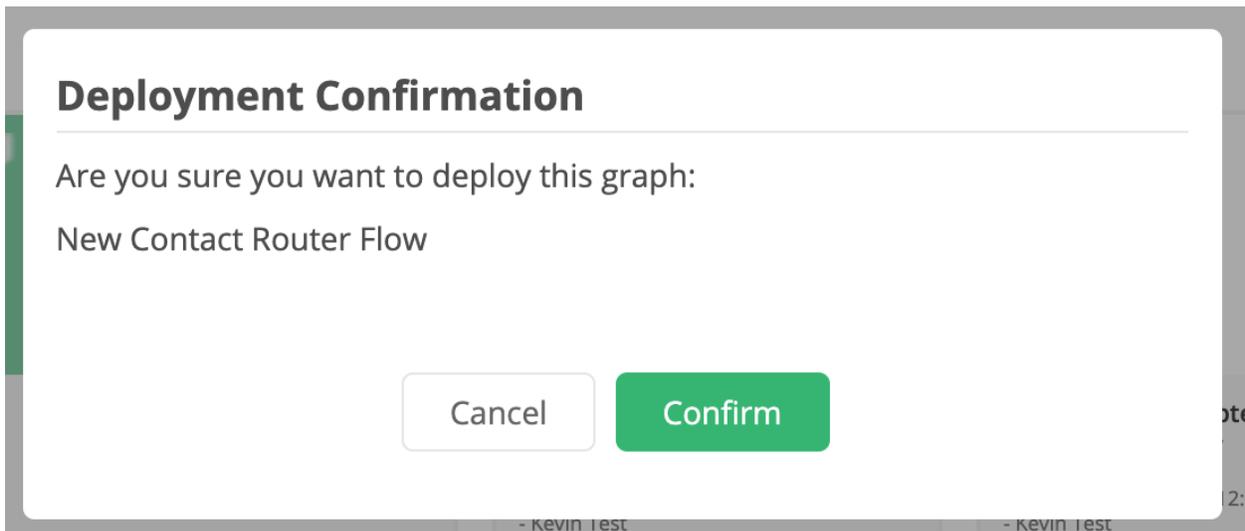
Contact FlowBuilder

Manage all of your Contact Routing Flows. Only one Flow can be live at a time.



The screenshot shows the Contact FlowBuilder interface with three flow graphs. The first graph, 'Contact Router Example', is marked as 'LIVE' and has a 'Deployed' status of 09/07/2020. The second graph, 'New Contact Router Flow', has a 'View Only' button and an 'Edit' button. A red box highlights the deployment icon (a flag) on the right side of this graph. The third graph, 'Router Graph - September 3, 2019 4:05 PM copy', has a 'Modified' status of 09/03/2019, 12:06PM SST.

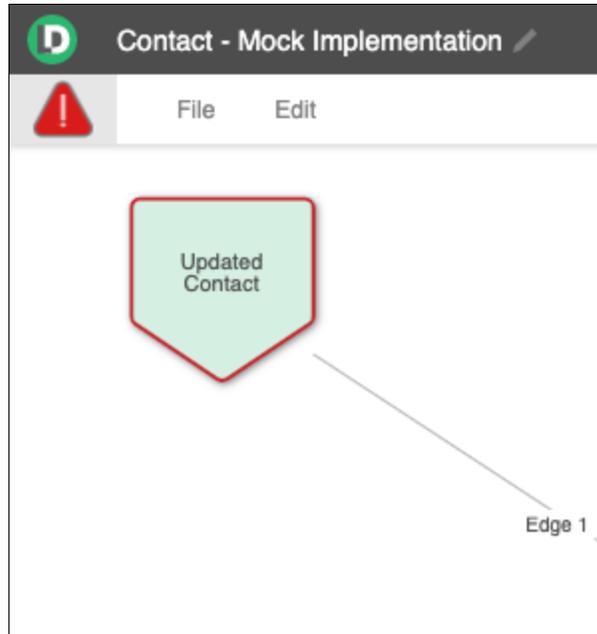
You will get a Deployment Confirmation. Select **Confirm** to deploy the deployment. If you already had a graph deployed, it will automatically be deactivated.



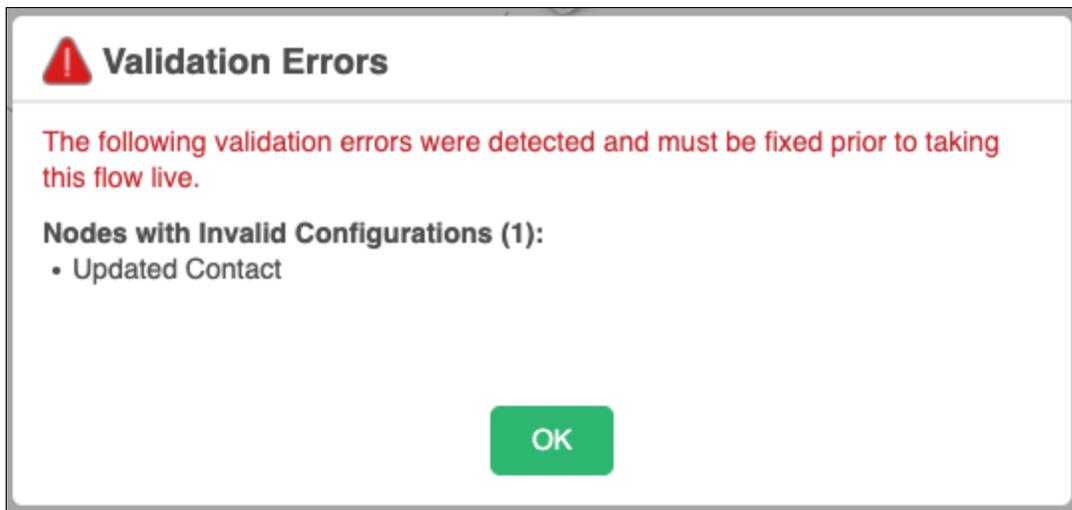
The screenshot shows a 'Deployment Confirmation' dialog box. The text inside the dialog reads: 'Are you sure you want to deploy this graph: New Contact Router Flow'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Confirm'. The 'Confirm' button is highlighted in green.

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.



Validation Errors

The following validation errors were detected and must be fixed prior to taking this flow live.

Nodes with Invalid Configurations (1):

- Updated Contact

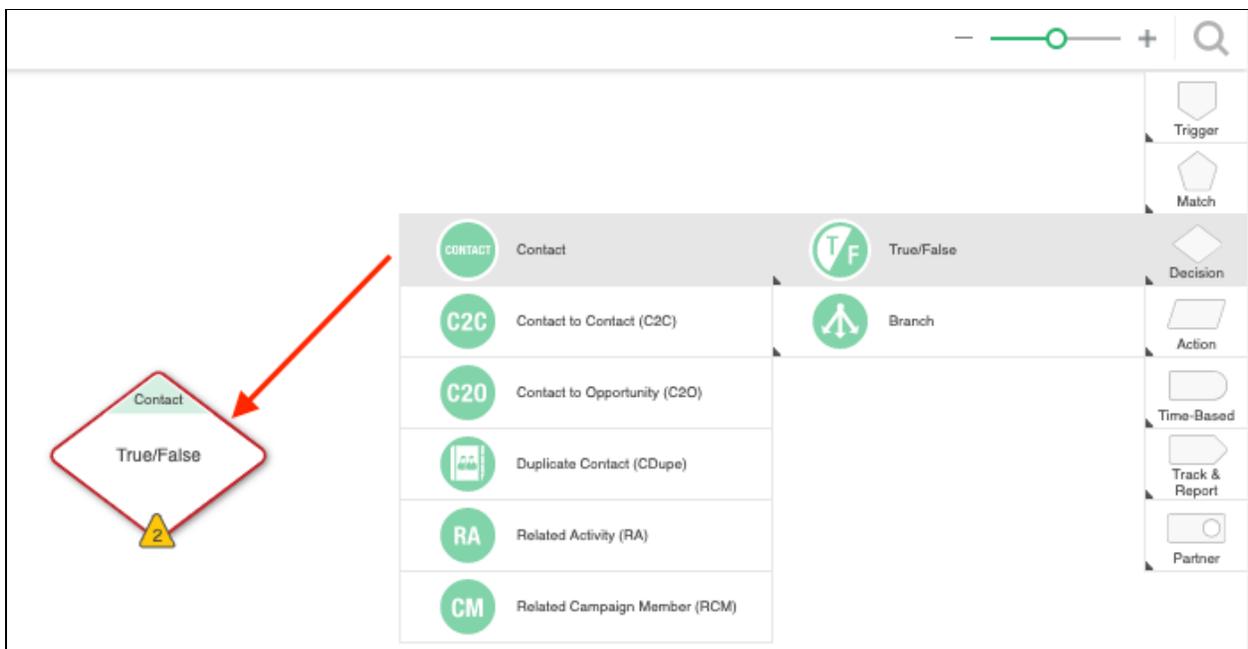
OK

General Node Actions

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

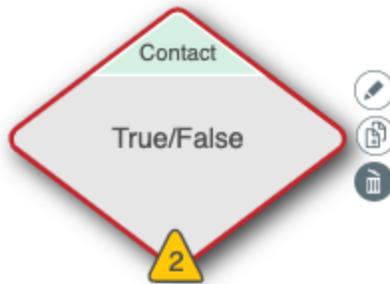
Adding Nodes

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.

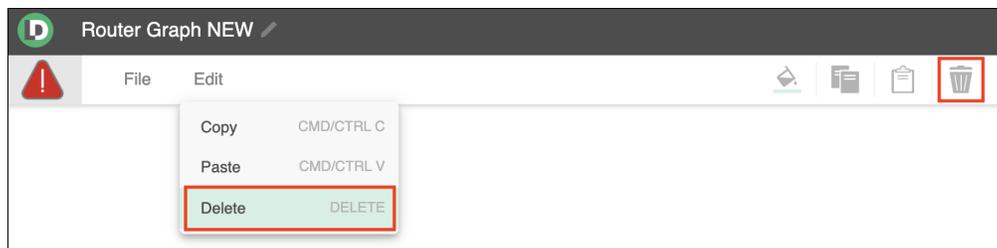


Deleting Nodes

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

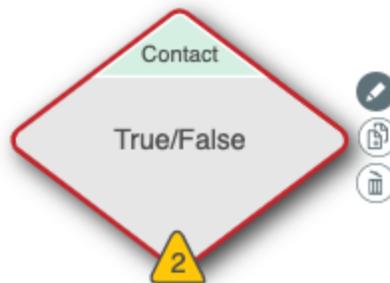


You can also Delete nodes using the Menu Bar at the top of the page by selecting the node(s) you wish to delete, and then either hitting the Trash icon or selecting **Delete** from the **Edit** menu at the top. You can also use the DELETE key on your keyboard.



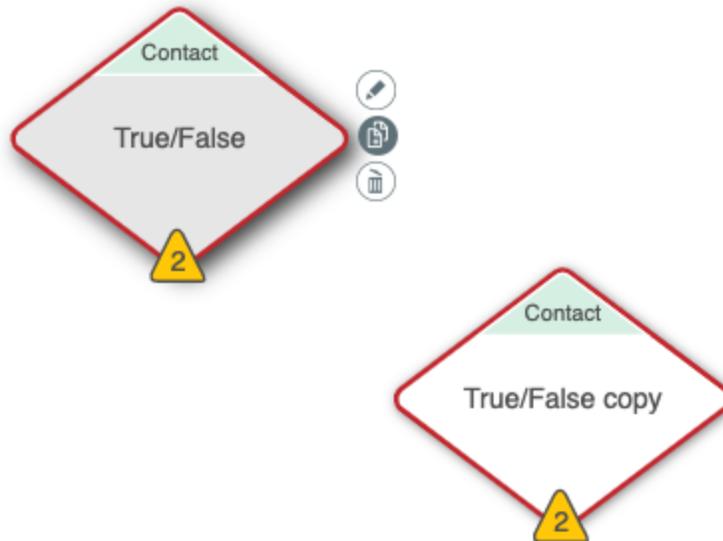
Editing Nodes

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.



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 Contact processing to stop at your selected node, simply select **End of Flow**.

Decision - Branch

Node Name
Country Check?

Description >

Condition	Label	Target
(Mailing Country equals United States)	USA	None
(Mailing Country equals Canada)	Canada	END OF FLOW
Default	Default	END OF FLOW

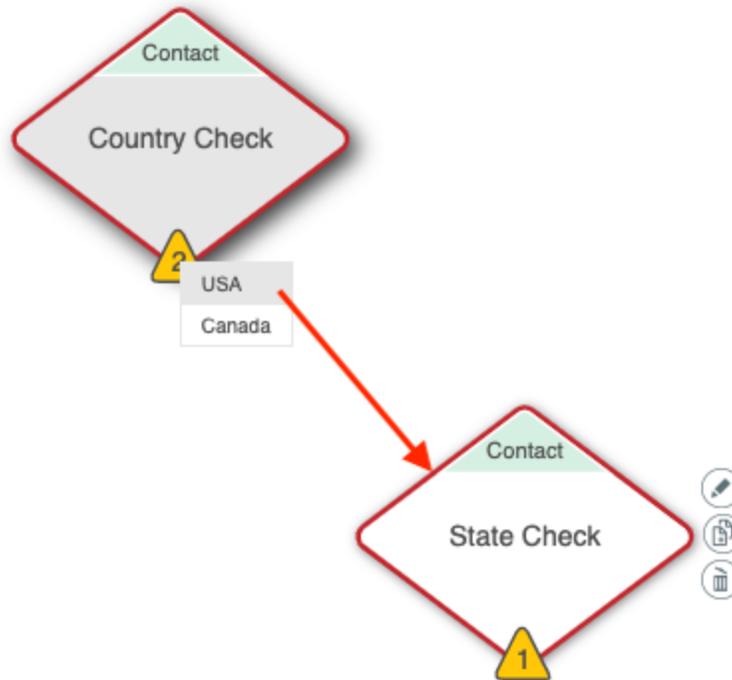
Value / Field Contact Field Operator Value

1. Mailing Country equals United States

+ New condition

Description >

- 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.

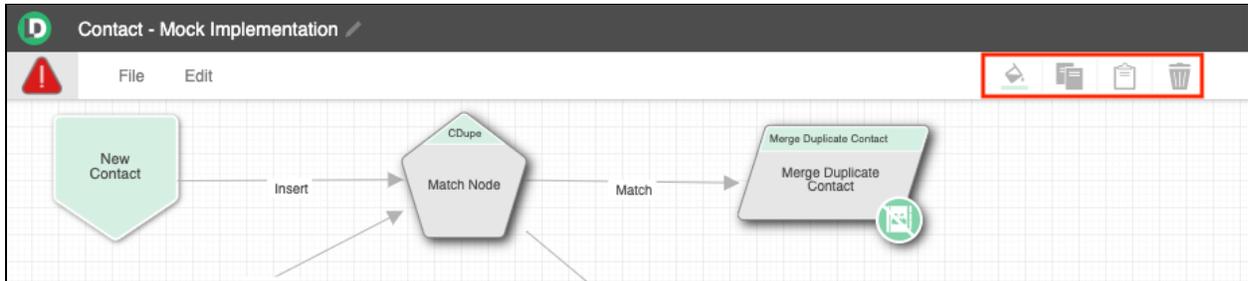
To change the color of existing nodes on your graph, select the node(s) you would like to change, then pick the desired color from the palette, and the selected nodes will change to the selected color.

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.

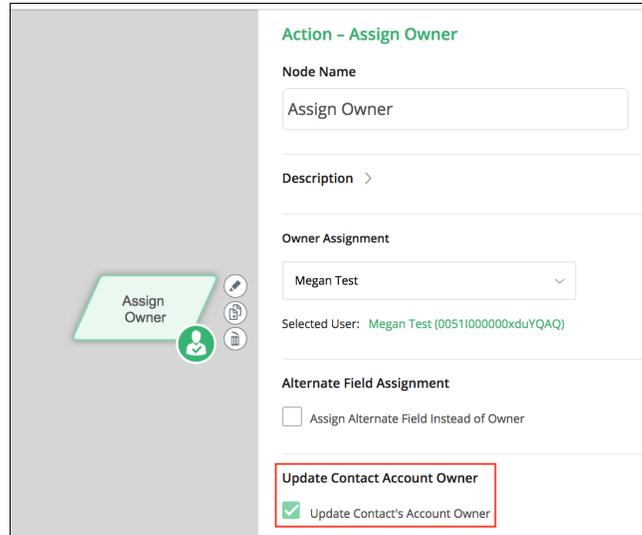


Node Guides

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](#).

Best Practices

- If you are using Lead to Contact merging in LeanData's Lead Router, it's possible to trigger actions or assignments in Contact Routing through the LeanData 'Routing Action' field that comes with our Managed Package. When a Lead merges into a Contact, the Contact's Routing Action field will be populated with 'merged - master', which can then be used as a trigger to route the Contact, or take some other kind of action.
- It's common to check Account ownership prior to assigning a Contact. For example, if the Account is owned by a rep then the Contact can be assigned to the Account owner through a 'Route to Matched Account' node. If the Account is not owned by an active rep any longer, then the Contact can be assigned to a new rep through Assign Owner or Round Robin.
- After assigning a Contact, it's common to also update the Account owner to ensure Contact and Account owner alignment. You can do so by selecting this option within assignment nodes:



Action - Assign Owner

Node Name
Assign Owner

Description >

Owner Assignment
Megan Test

Selected User: Megan Test (00511000000xduYQAQ)

Alternate Field Assignment
 Assign Alternate Field Instead of Owner

Update Contact Account Owner
 Update Contact's Account Owner

FAQs

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

You can only use fields that are located on the Contact object itself to trigger a Contact re-route. So while we can use changes to the Account Lookup field itself (on the Contact object), we cannot use any changes on a field located on the associated Account record to trigger a Contact re-route.

Is it possible to de-dupe Contacts?

Yes, you can use the Duplicate Contact Match Node, followed by a Merge Dupe Contacts Node to merge duplicate Contacts.

Is it possible to match orphan Contacts to matched Accounts?

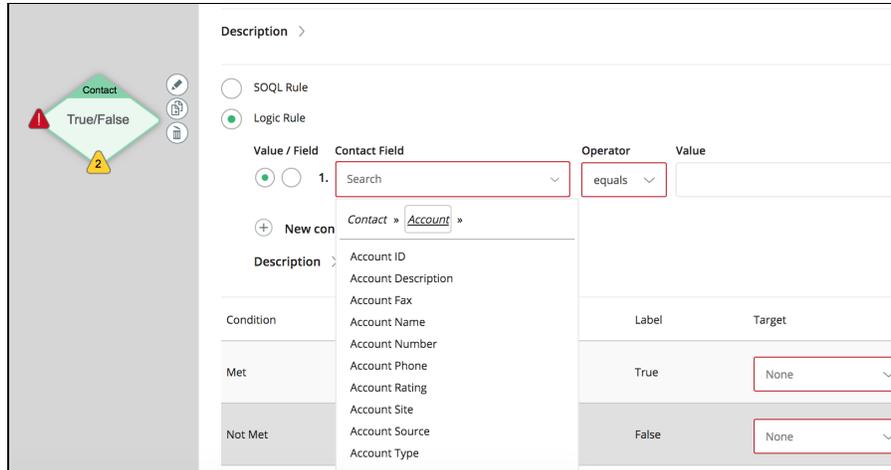
No, Contact Router can only route Contacts to Round Robin groups, explicit owners, or to custom user fields on an already associated Account.

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

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

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

Yes, in decision nodes you can access fields on the Account object:



For additional help and assistance, please [submit a ticket to LeanData Support](#).