

# LeanData Routing

Routing Action Values & Definitions



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## Overview

The following guide contains a high level overview of the LD Routing Action field and corresponding values.

General definitions of various terms used.

### Routing Action (API: `LeanData__Routing_Action__c`)

- Represents the last action that was taken on a Lead, Contact, Account, Opportunity, or Case through our LeanData system
- An “action” is an attempt at some type of data transformation (e.g. if a Lead was filtered out at some point in a Routing flow, it would not constitute an action)

## Routing Action Values

The following values will be populated in the Routing Action field after LeanData has completed an Action

### Lead Routing Action Values

**<null>** :

- Lead has not yet been picked up by LeanData system
- Lead processing did not result in any action (no applicable action value)

**converted** : Lead has been converted into a Contact on Matched Account

**converted - new account** : Account has been created from the Lead, and the Lead has been converted into a Contact on this new Account

**custom interface** : a custom action has occurred (based on custom action rules outlined/purchased by company)

**new account** : Lead information used to create new Account (Lead is not converted and remains intact; no new Contact created)

**new opportunity** : an Opportunity has been created from details outlined within node form

**new task** : Lead information (and potentially matched object info) used to create new task

**pending - time based**: Lead has interacted with a Time-Based node and is pending further

actions once evaluation time frame is met. When a record exits a Time-Based Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**pending - hold-until:** Lead has interacted with a Hold Until node and is pending further actions once one of its update criteria is met, or if the specified time frame expires. When a record exits a Hold Until Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**routed - account or assigned - account** (if user from Account has been assigned to an alternate lookup field on Lead):

- Lead matched to existing SFDC Account and assigned to Account-based owner
- Ownership can include:
  - Account owner
  - User on Account-level field
  - Owner mapping
  - Account Team
  - User field off Account-level user object

**routed - activity or assigned - activity** (if user from Activity has been assigned to an alternate lookup field on Lead):

- Lead matched to existing SFDC Activity and assigned to Activity owner
- Ownership can include:
  - Activity owner
  - User on Activity-level field
  - User field off Activity-level user object

**routed - opportunity or assigned - opportunity** (if user from Opportunity has been assigned to an alternate lookup field on Lead):

- Lead matched to existing SFDC Opportunity and assigned to Opportunity owner
- Ownership can include:
  - Opportunity owner
  - User on Opportunity-level field
  - User field off Opportunity-level user object

**routed - lead or assigned - lead** (if user from matched Lead has been assigned to an alternate lookup field on Lead):

- Lead matched to existing SFDC Lead and assigned to Lead-based owner
- Ownership includes:
  - Existing matched SFDC Lead owner

**routed - round robin or assigned - round robin** (specific user from a Round Robin pool has been assigned to alternate lookup field on Lead):

- Lead ownership routed via Round Robin user assignment (regardless of matching results)

- This includes Round Robin being used as a fallback

**routed - assignment rule :**

- Lead ownership routed via assignment rules (regardless of matching results)
  - This includes assignment rule being used as a fallback

**routed - owner assignment** or **assigned - owner assignment** (if user specified in Assign Owner node was assigned to alternate lookup field on Lead):

- Lead ownership routed via explicit owner assignment

**routed - territory** or **assigned - territory** (if user from territory rules was assigned to alternate lookup field on Lead):

- Lead ownership routed via matched territory as defined in Territory Management

**merged :**

- Lead was successfully merged with existing duplicate Lead or Contact
  - In the case of a merge attempt and failure, routing action would remain '<null>'

**merged - updated:**

- Lead was routed via updated trigger then merged with existing duplicate Lead or Contact

**merged - master :**

- Another Lead was successfully merged into this particular Lead
  - In the case of a merge attempt and failure, routing action would remain '<null>' (unchanged)

## Contact Routing Action Values

**<null> :**

- Contact has not yet been picked up by LeanData system
- Contact processing did not result in any action

**converted**

- A Lead was converted by LeanData into this Contact

**converted - new account**

- A Lead as converted into this Contact + new Account was created

**merged - master**

- Lead or Contact merged into this Contact via LeanData Router

**pending - time based:** Contact has interacted with a Time-Based node and is pending further

actions once evaluation time frame is met. When a record exits a Time-Based Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**pending - hold-until:** Contact has interacted with a Hold Until node and is pending further actions once one of its update criteria is met, or if the specified time frame expires. When a record exits a Hold Until Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**routed - account or assigned - account** (if user from Account has been assigned to an alternate lookup field on Contact):

- Contact routed to Account owner / custom Account field user

**routed - activity or assigned - activity** (if user from Activity has been assigned to an alternate lookup field on Contact):

- Contact matched to existing SFDC Activity and assigned to Activity owner
- Ownership can include:
  - Activity owner
  - User on Activity-level field
  - User field off Activity-level user object

**routed - contact or assigned - contact** (if user from matched Contact has been assigned to an alternate lookup field on Contact):

- Contact routed to matched Contact field user (standard owner or custom user field)

**routed - opportunity or assigned - opportunity** (if user from matched Opportunity has been assigned to an alternate lookup field on Contact):

- Contact routed to matched Opportunity field user (standard owner or custom user field)

**routed - owner assignment or assigned - owner assignment** (if user specified in Assign Owner node was assigned to alternate lookup field on Contact):

- Contact ownership routed via explicit owner assignment

**routed - round robin or assigned - round robin** (if specific user from a Round Robin pool has been assigned to alternate lookup field on Contact):

- Contact routed based off Contact Round Robin

**routed - territory or assigned - territory** (if user from territory rules was assigned to alternate lookup field on Contact):

- Contact ownership routed via matched territory as defined in Territory Management

**routed - with contact**

- Account ownership changed using the “Update Contact’s Account Owner” option. This value will appear on the routing action field on the Account.

***new opportunity*** :

- Contact information used to create new Opportunity

***new task*** :

- Contact information (and potentially matched object info) used to create new task

## Account Routing Action Values

***<null>*** :

- Account has not yet been picked up by LeanData system
- Account processing did not result in any action

***converted - new account*** : Lead converted to a new Contact + new Account created

***new account*** : Lead information used to create new Account (Lead is not converted and remains intact; no new Contact created)

***pending - time based***: Account has interacted with a Time-Based node and is pending further actions once evaluation time frame is met. When a record exits a Time-Based Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

***pending - hold-until***: Account has interacted with a Hold Until node and is pending further actions once one of its update criteria is met, or if the specified time frame expires. When a record exits a Hold Until Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

***routed - account or assigned - account*** (if user from Account has been assigned to an alternate lookup field on Account):

- Account routed to custom Account field user

***routed - account team or assigned - account team*** (if user from team has been assigned to an alternate lookup field on Account):

- Account routed to user designated in Account team layout

***routed - activity or assigned - activity*** (if user from Activity has been assigned to an alternate lookup field on Account):

- Account matched to existing SFDC Activity and assigned to Activity owner
- Ownership can include:

- Activity owner
- User on Activity-level field
- User field off Activity-level user object

**routed - owner mapping or assigned - owner mapping** (if user from mapping has been assigned to an alternate lookup field on Account):

- Account routed to user designated in owner mapping

**routed - opportunity or assigned - opportunity** (if user from Opportunity has been assigned to an alternate lookup field on Account):

- Account assigned based on Opportunity owner
- Ownership includes:
  - Opportunity owner
  - User on Opportunity-level field
  - User field off Opportunity-level user object

**routed - owner assignment or assigned - owner assignment** (if user specified in Assign Owner node was assigned to alternate lookup field on Account):

- Account routed to a user via any other non-Account field means (e.g. explicit owner assignment, related object field off the Account, etc.)

**routed - round robin or assigned - round robin** (if specific user from a Round Robin pool has been assigned to alternate lookup field on Account):

- Account routed based off Account Round Robin

**routed - territory or assigned - territory** (if user from territory rules was assigned to alternate lookup field on Account):

- Account ownership routed via matched territory as defined in Territory Management

**new opportunity** : Account information used to create new Opportunity

**new task** : Account information (and potentially matched object info) used to create new task

## Opportunity Routing Action Values

**<null>** :

- Opportunity has not yet been picked up by LeanData system
- Lead processing did not result in any action

**converted - new opportunity** : a Lead has been converted by LeanData to this Opportunity

**pending - time based**: Opportunity has interacted with a Time-Based node and is pending



further actions once evaluation time frame is met. When a record exits a Time-Based Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**pending - hold-until:** Opportunity has interacted with a Hold Until node and is pending further actions once one of its update criteria is met, or if the specified time frame expires. When a record exits a Hold Until Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**routed - account or assigned - account** (if user from Account has been assigned to an alternate lookup field on Opportunity):

- Opportunity routed to Account field user (standard owner or custom user field)

**routed - activity or assigned - activity** (if user from Activity has been assigned to an alternate lookup field on Opportunity):

- Opportunity matched to existing SFDC Activity and assigned to Activity owner
- Ownership can include:
  - Activity owner
  - User on Activity-level field
  - User field off Activity-level user object

**routed - contact or assigned - contact** (if user from Account has been assigned to an alternate lookup field on Opportunity):

- Opportunity routed to matched Contact field user (standard owner or custom user field)

**routed - opportunity or assigned - opportunity** (if user from matched Opportunity has been assigned to an alternate lookup field on Opportunity):

- Opportunity routed to matched Opportunity field user (standard owner or custom user field)

**routed - owner assignment or assigned - owner assignment** (if user specified in Assign Owner node was assigned to alternate lookup field on Opportunity):

- Opportunity routed to a user via any other non-Account field means (e.g. explicit owner assignment, related object field off the Account, etc.)

**routed - round robin or assigned - round robin** (if specific user from a Round Robin pool has been assigned to alternate lookup field on Opportunity):

- Opportunity routed based off Opportunity Round Robin

**routed - territory or assigned - territory** (if user from territory rules was assigned to alternate lookup field on Opportunity):

- Opportunity ownership routed via matched territory as defined in Territory Management

**routed - with opportunity**

- Account ownership changed using the “Update Opportunity’s Account Owner” option. This value will appear on the routing action field on the Account.

**new opportunity** : Opportunity information used to create new Opportunity

**new task** : Opportunity information (and potentially matched object info) used to create new task

## Case Routing Action Values

**<null>** :

- Case has not yet been picked up by LeanData system
- Case processing did not result in any action

**pending - time based**: Case has interacted with a Time-Based node and is pending further actions once evaluation time frame is met. When a record exits a Time-Based Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**pending - hold-until**: Case has interacted with a Hold Until node and is pending further actions once one of its update criteria is met, or if the specified time frame expires. When a record exits a Hold Until Node, the Routing Action field will be cleared and remain cleared unless LeanData takes another action.

**routed - activity** or **assigned - activity** (if user from Activity has been assigned to an alternate lookup field on Case):

- Case matched to existing SFDC Activity and assigned to Activity owner
- Ownership can include:
  - Activity owner
  - User on Activity-level field
  - User field off Activity-level user object

**routed - owner assignment** or **assigned - owner assignment** (if user specified in Assign Owner node was assigned to alternate lookup field on Case):

- Case routed to a user (e.g. explicit owner assignment, related object field off the Account, etc.)

**routed - round robin** or **assigned - round robin** (if specific user from a Round Robin pool has been assigned to alternate lookup field on Case):

- Case routed based off Opportunity Round Robin