

# LeanData Routing

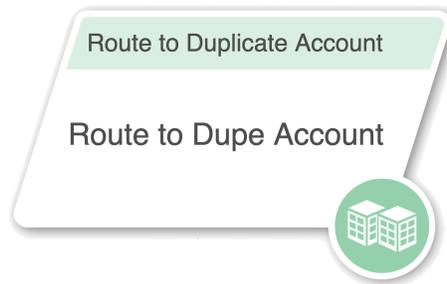
Route to Duplicate Account Node



<b>Overview</b>	<b>3</b>
<b>Customization</b>	<b>3</b>
<b>Summary</b>	<b>8</b>

## Overview

The Route to Duplicate Account Node gives you the ability to assign a record to a User found on an Account that has been identified as a Duplicate of the routed Account. Please note that you can only use a Route to Duplicate Account Node if you have found a Duplicate Account using the Duplicate Account Match Node at a previous point in the graph.



**Example:** *Melanie is the LeanData Admin for OpenLane Software. She is currently building their Account Router Flow. For newly created Accounts, she wants to identify any duplicate Accounts that already exist in their system and route newly created Accounts to the owner of the existing Account. She uses a Duplicate Account Match Node, followed by the Route to Duplicate Account Node to accomplish this.*

**Please Note:** The ability to merge Accounts is not currently supported.

## Customization

You have a number of options to configure the node.

- Node Name
- Description
- Account Ownership
- Routing Schedule
- Alternate Field Assignment
- Email Notifications
- Advanced Settings

**Action: Route to Duplicate Account**

**Node Name**

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**Description** >

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**Account Ownership**

Duplicate Account Owner

Duplicate Account Custom User Field

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**Routing Schedule** ?

Respect User's Schedule

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**Alternate Field Assignment**

Assign Alternate Field Instead of Owner

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**Email Notifications** ?

Success Notifications

Failure Notifications

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**Advanced Settings** >

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### Node Name

By default, the Node Name is set to Route to Dupe Account. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the assignment. This will help others understand the purpose of the node.

### 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 graph, the description will help them to understand the goal of the customizations.

## Account Ownership

The Account Ownership Section has options for assigning the owner to the routed record.

- **Duplicate Account Owner:** This option lets you select the owner of the Duplicate Account as owner of the routed Account.
- **Duplicate Account Custom User Field:** This option tells the Router Graph to use a specific User Look-up field on the Duplicate Account record as the source of the owner information. Use the drop-down menu to select the desired field.

**Account Ownership**

Duplicate Account Owner

Duplicate Account Custom User Field

Select the user field to assign the account to

## Routing Schedule

By checking the **Respect User's Schedule** box, you will have the option to have LeanData check whether a User is currently working before proceeding to assign the record to that User. You have the option of selecting which component of a User's schedule to respect. For example you can choose to respect Pausing but not Working Hours, Vacations, or Holidays. Selecting one of these options will give you another fallback option to direct what you would like LeanData to do in the case that the assignment is outside of the intended User's schedule.

**Routing Schedule** 

Respect User's Schedule

- Working Hours
- Vacation
- Holiday
- Pausing

## Alternate Field Assignment

This Option will tell LeanData to update another User field on your Account record instead of updating the Owner field.

- **Assign Alternate Field Instead of Owner:** When you select this option you will see a drop-down menu to select the target field.

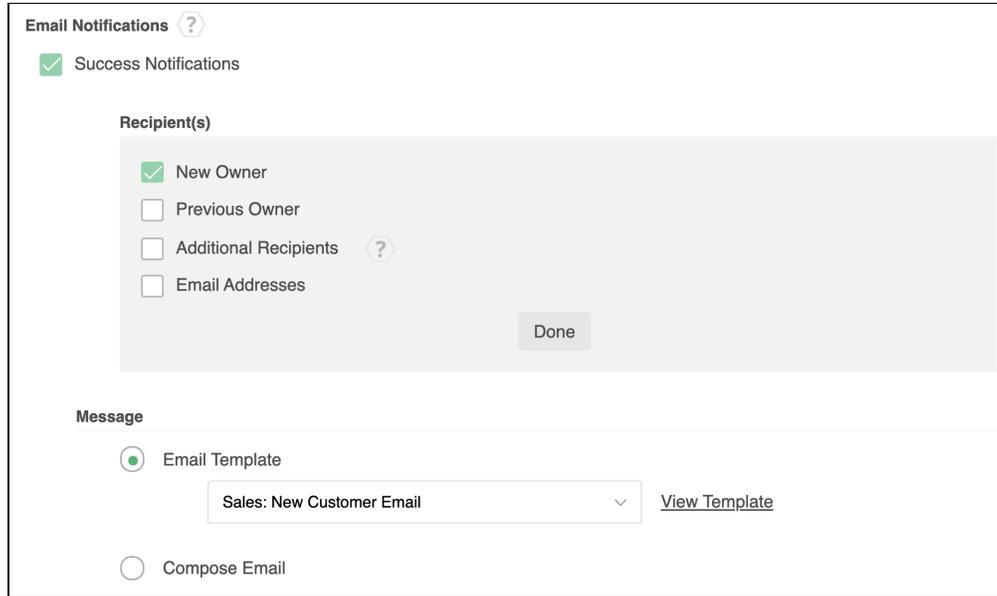
**Alternate Field Assignment**  
 Assign Alternate Field Instead of Owner  
Select the Account user field to assign:

**Please Note:** In order to use the Alternate Field Assignment, you must select the person to populate the Alternate Field from the Account Ownership settings.

### Email Notifications

The email notifications allow you to configure how the Route to Duplicate Account node can notify Users of either a successful owner assignment or a failure. You can select an email template and list of recipients.

- **Success Notifications:** Use these settings to send an email message to Users when a record is successfully actioned.
  - **Select your Recipient(s)**
    - **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.
    - **Additional Recipients** - This option lets you send the notification to a User on the Account or on any records matched earlier in the graph.
    - **Email Addresses** - This option will let you enter additional email addresses separated by a comma.
  - **Select an Email Template or Compose an Email.**
    - **Email Template** - use this option to select an existing Salesforce Email template to use for your message. Use the View Template link to open the template in a new tab.
    - **Compose Email** - Use this to compose a custom message. You can include merge fields and relative dates as needed.



**Email Notifications** ?

Success Notifications

**Recipient(s)**

New Owner  
 Previous Owner  
 Additional Recipients ?  
 Email Addresses

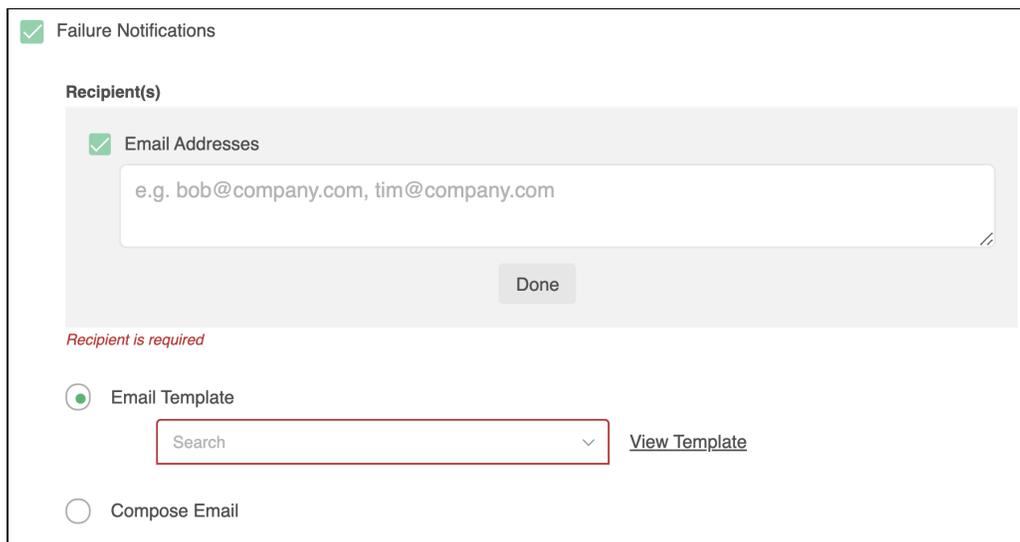
[Done](#)

**Message**

Email Template  
 Compose Email

Sales: New Customer Email ▼ [View Template](#)

- **Failure Notifications:** Use these settings to send an email message to Users when the intended action fails.
  - **Select your Recipient(s)**
    - **Email Addresses** - This will let you enter email addresses separated by a comma.
  - **Select an Email Template or Compose an Email.**
    - **Email Template** - use this option to select an existing Salesforce Email template to use for your message. Use the View Template link to open the template in a new tab.
    - **Compose Email** - Use this to compose a custom message. You can include merge fields and relative dates as needed.



Failure Notifications

**Recipient(s)**

Email Addresses

e.g. bob@company.com, tim@company.com

[Done](#)

*Recipient is required*

Email Template  
 Compose Email

Search ▼ [View Template](#)

## Advanced Settings

The Advanced Settings section gives you fallback options for the routed record and the ability to send the record to the next node of the graph as needed.

- **Out of User Schedule:** This option only appears if you have selected **Respect User's Schedule** in the Routing Schedule section above. This will allow you to direct a record towards another path if the intended owner is outside of their schedule.
- **Invalid/Inactive User:** This is a fallback condition in the event that the selected User is not active or invalid at the time of the routing. By default this will be set to End of Flow
- **Next Node:** This option allows the record to be routed to another node in the Router graph after the owner has been assigned. You can also set this node to End of Flow. This will stop actions at this node instead of proceeding to another node.

## Summary

The Route to Duplicate Account Node will allow you to assign an Account to a User related to the Duplicate Account the incoming Account has matched to. This node allows you to control how you assign the owner as well as tools for sending notifications on success or failure of the assignment. There are also fallback conditions to manage if the User is invalid or inactive.

For more information on working with router flows please see our [Account Routing Guide](#).