LeanData Routing

Assign Owner Node

Overview

The Assign Owner Action Node gives you the ability to assign a record to a specific owner from your list of Users and Queues as part of the routing flow. The owner assignment does not depend on having a previously matched record in your flow.

Example: Alex is the LeanData Admin for GlobalWorld Software. He is currently building their Lead Router Flow. The goal of the flow is to get the Leads to the right owners. Using various nodes, he has filtered and matched the Leads. Most of the Leads are routed to various owners using a round robin node. When a Lead comes in through the New Entry Node but is not Marketing Qualified, Alex has it sent to a marketing holding Queue using the Assign Owner Node.

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Route To
- Routing Schedule
- Alternate Field Assignment
- Email Notifications
- Advanced Settings

Action: Assign Owner

Node Name

Assign Owner

Description >

Route To

- ● Specific Users

    Search ⌄

    Selected User:

- ○ User Field on Routed Lead

Routing Schedule (?)

- ☑ Respect User's Schedule
    - ☑ Working Hours
    - ☑ Vacation
    - ☑ Holiday
    - ☑ Pausing

Alternate Field Assignment

- ☐ Assign Alternate Field Instead of Owner

Email Notifications (?)

- ☐ Success Notifications
- ☐ Failure Notifications

Advanced Settings ⌄

Specify the target node, if any, when a condition below is met.

Condition	Label	Target
Invalid/Inactive User	Invalid/Inactive User	END OF FLOW ⌄
Out of User Schedule	Out of User Schedule	None ⌄
Next Node	Next Node	END OF FLOW ⌄

Cancel   Done

Node Name

By default, the Node Name is set to Assign Owner. 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. For our example, we would call this node, Assign to Marketing for our use case.
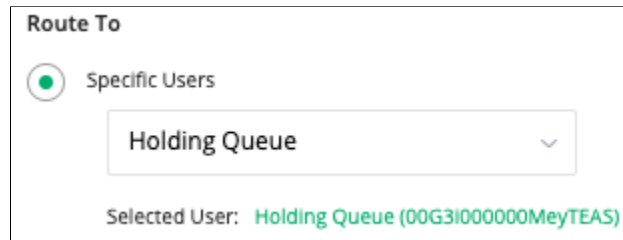
Description

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.

Route To

The Route To Section has options for assigning the owner to the routed record.

- **Specific Users:** This option lets you pick an owner based on your Users and Queues. All of your Users will appear on the drop-down menu. When you select a User their name and Salesforce id will be displayed below the field.

- **User Field on Routed Lead:** This option tells the Router Flow to use a specific User Look-up field on the routed record itself as the source of the owner information instead of a specific User selected from the dropdown. Use the drop-down menu to locate the field.
    - *Example: GlobalWorld has partner reps that will work Leads that have come through a partner channel. Since these reps do not have GlobalWorld Salesforce Accounts, the admin, Alex, cannot assign them using the **Specific Users Option**. When the Lead comes in, the Partner Rep Field is assigned. As the Lead moves through the Router Flow and gets to the **Assign Owner Node**, Alex uses the **User Field on Routed Lead** option to look up the value in the Partner Rep field and assign it to the Owner field so the record is not routed to a GlobalWorld rep.*

Routing Schedule

The Routing Schedule section gives you options on how to honor user schedules. You can configure each node to honor all schedule types or any combination as needed.

Alternate Field Assignment

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

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

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.

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 fallback options for the routed records and the ability to send the record to the next node of the flow as needed.

- **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
- **Out of User Schedule:** This edge is used if the selected user is not scheduled to accept Leads at the time of routing. This edge is only displayed when the Respect User Schedule options are selected.
- **Next Node:** This option allows the record to be routed to another node in the Router Flow after the owner has been assigned. This can include things like Converting the Lead into a contact, updating a field on the Lead, etc. You can also set this node to End of Flow. This will stop routing records at this node instead of sending it to another node.

Things to Know & Best Practices

- Replace Lead assignment rules with decision nodes and explicit owner assignments in order to see metrics and more easily understand where Leads are being routed.
- If a User or Queue is not showing up in the list, confirm that the User is active as only active Users will show up in the list.

Summary

The Assign Owner Node will allow you to assign a record to a specific User or Queue in your system. The node has options 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 Lead Routing Guide:
https://leandatahelp.zendesk.com/hc/en-us/articles/360016339074