

LeanData Routing

Route to Matched Lead Node



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Overview

The Route to Matched Lead Node gives you the ability to assign a routed Lead record, to the owner of a Lead matched to that record.



Example: Kevin is the LeanData Admin for OnPoint Communications. 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, matched the Leads to Accounts, and routed them. When a Lead does not match to an account, Kevin wants the router flow to look for an existing related Lead and route it to the owner of the matched Lead.

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Lead Ownership
- Queue Owned Lead
- Routing Schedule
- Alternate Field Assignment
- Email Notifications
- Advanced Settings

Action: Route to Matched Lead

Node Name

Description >

Lead Ownership

Matched Lead Owner
 Matched Lead Custom User Field

Queue Owned Lead

Prevent Routing to Queues

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 ▾

Node Name

By default, the Node Name is set to Route to Matched Lead. 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, Route to Matched Lead.

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.

Lead Ownership

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

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

Lead Ownership

Matched Lead Owner

Matched Lead Custom User Field

Select the user field to assign the Lead to:

Queue Owned Lead


When routing records it is a best practice to route to users not queues. The Route to Matched Lead Node has an option to prevent the accidental routing of records to queues. Selecting the option, Prevent Routing to Queues, will add a new fallback edge to this node, Queue Owned Matched Lead. Records that would be routed to a queue will follow the Queue Owned Matched Lead edge.

Queue Owned Lead

Prevent Routing to Queues

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.

Routing Schedule 

Respect User's Schedule

- Working Hours
- Vacation
- Holiday
- Pausing

Alternate Field Assignment

This Option will tell LeanData to update another field on your routed 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.

Alternate Field Assignment

Assign Alternate Field Instead of Owner

Select the Lead 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 Lead Ownership settings. 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:

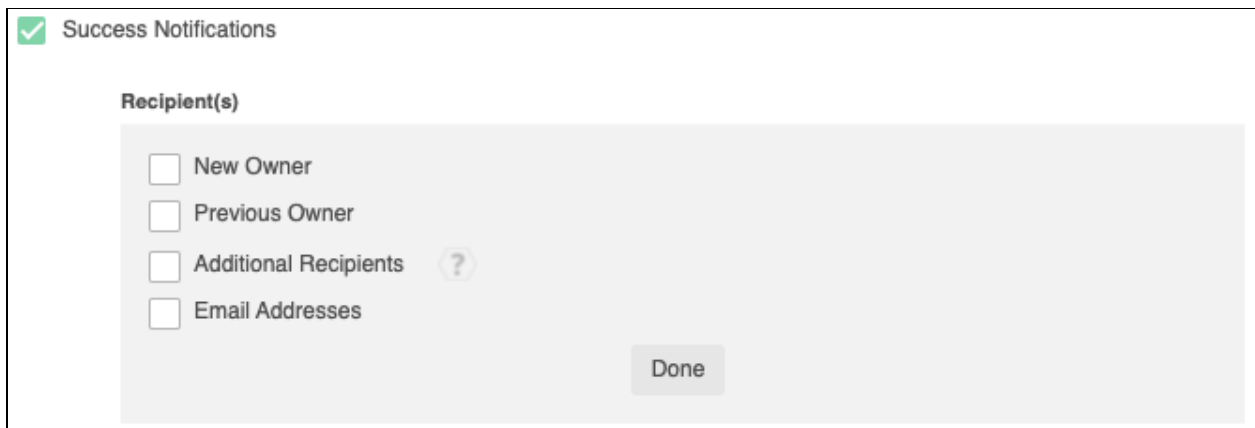
- Pick the recipients
- Select an existing template or compose an email

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:

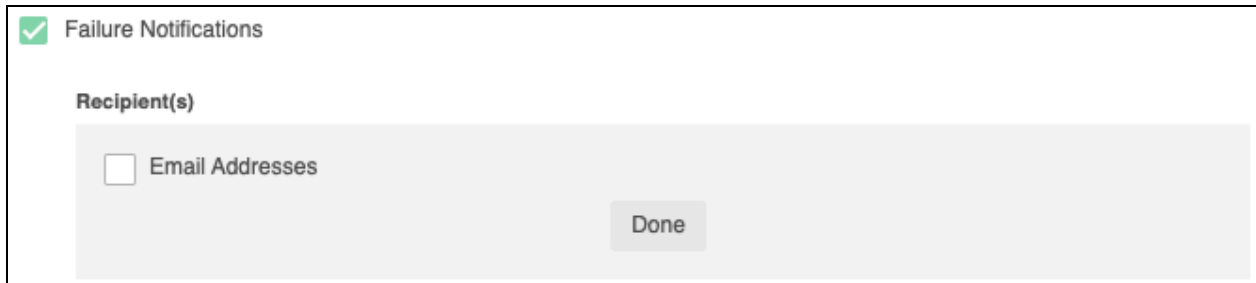
- **Success Notifications:**
 - Use the Email Recipients section to pick the desired recipients of the notification.
 - **New Owner** - This option will send the notification to the new owner of the record.
 - **Previous Owner** - This option will send the notification to the previous owner of the record.
 - **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).



The screenshot shows a configuration window for "Success Notifications". At the top left, there is a green checkmark icon followed by the text "Success Notifications". Below this, the section is titled "Recipient(s)". There are four options, each with an unchecked checkbox: "New Owner", "Previous Owner", "Additional Recipients" (which has a small question mark icon to its right), and "Email Addresses". At the bottom right of the configuration area, there is a grey button labeled "Done".

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.



The screenshot shows a configuration window for 'Failure Notifications'. At the top left, there is a green checkmark icon followed by the text 'Failure Notifications'. Below this, the section is titled 'Recipient(s)'. Inside this section, there is a checkbox labeled 'Email Addresses' which is currently unchecked. To the right of the checkbox is a grey button labeled 'Done'.

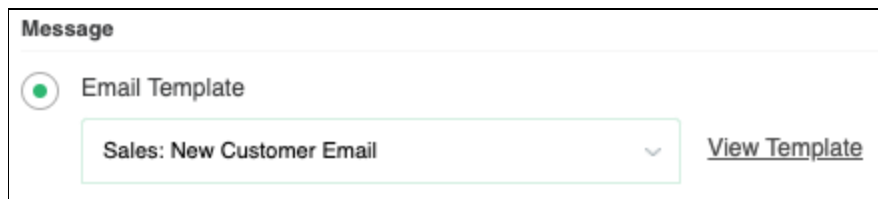
Message

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.



The screenshot shows the 'Message' configuration section. At the top, the word 'Message' is displayed. Below it, there is a radio button with a green dot selected, followed by the text 'Email Template'. Underneath this, there is a dropdown menu with the text 'Sales: New Customer Email' and a downward arrow. To the right of the dropdown menu is a link labeled 'View 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.

Compose Email

Insert a Field ▼ Insert Relative Date

Create a Message

Required: Must input a 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.

Email Template

Compose Email

Subject

Enter Subject

Message

Insert a Field ▼ Insert Relative Date

Object » <Audit.Log.Full>

Owner ▶

Routed Lead ▶

Audit Log Link

Full Audit Log Link

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.

Insert - Relative Date

Specify a relative date to insert in the field.

Today

days after today

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.
- **Queue Owned Matched Lead:** This is a fallback condition, that only appears when the option Prevent Routing to Queues is selected. Any routed record that would be assigned to a queue will be directed down this edge.
- **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 different 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.

Summary

The Route to Lead Node will allow you to assign a routed record to a User on the Lead the record has matched to. This node includes options for assigning to the owner of the matched Lead, another User field, and/or using an alternate field assignment instead of setting the owner of the routed Record. 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 Lead Routing Guide:
<https://leandatahelp.zendesk.com/hc/en-us/articles/360016339074>