LeanData Routing

Route to Duplicate Lead Node

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Overview

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

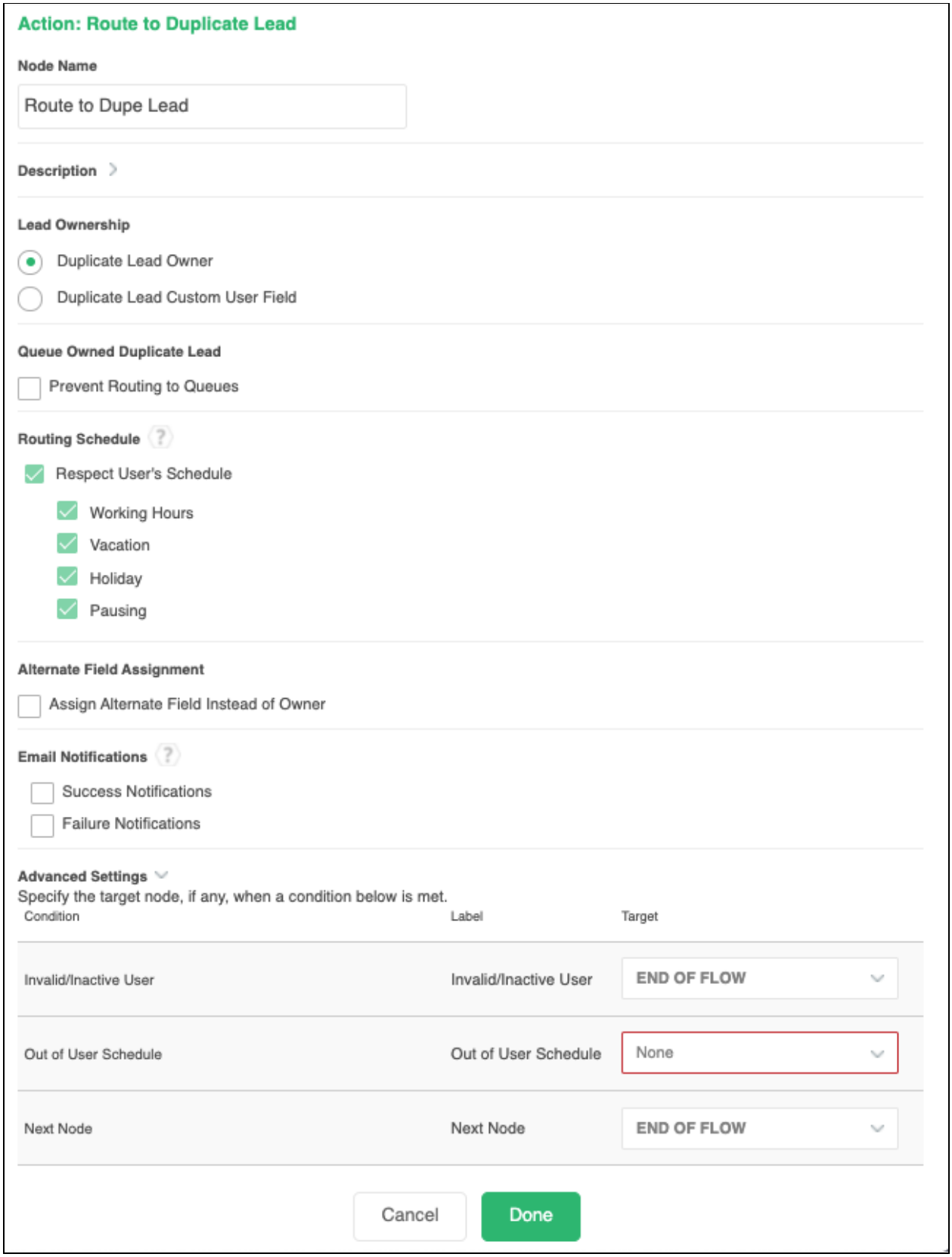
Example: *Lauren is the LeanData Admin for OpenLane Software. She is currently building their Lead Router Flow. For incoming new Leads, she wants to identify any duplicate Leads that already exist in their system, but instead of merging the records, she wants the new Leads to be routed to the current owner of the existing duplicate Leads so the existing Lead owner can decide what to do with the new Lead. She uses a Duplicate Lead Match Node, followed by the Route to Duplicate Lead Node to accomplish this.*

Note: if you would like to merge the duplicates instead of merely assigning, please use the Merge Dupe Lead Node instead.

Customization

You have a number of options to configure the node.

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

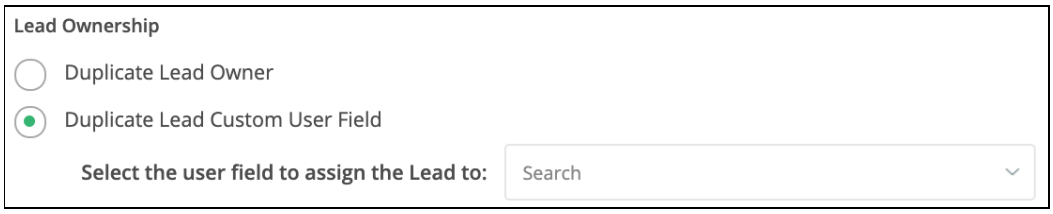

Action: Route to Duplicate Lead
Node Name
Route to Dupe Lead
Description
Lead Ownership
Duplicate Lead Owner
Duplicate Lead Custom User Field
Queue Owned Duplicate Lead
Prevent Routing to Queues
Routing Schedule
Respect User's Schedule
Working Hours
Vacation
Holiday
Pausing
Alternate Field Assignment
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
Cancel
Done

Node Name
By default, the Node Name is set to Route to Duplicate 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.

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.

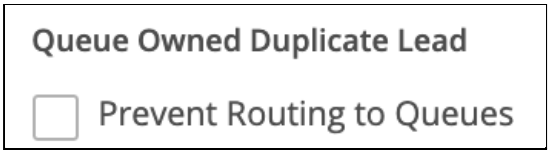
Lead Ownership
The Lead Ownership Section has options for assigning the owner to the routed record.

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

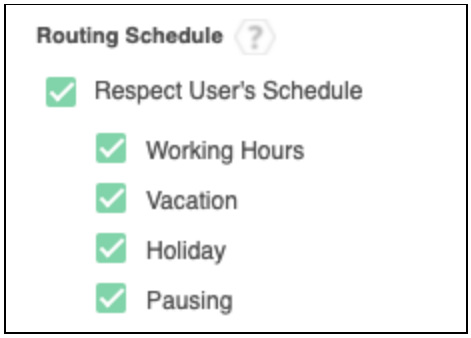


Queue Owned Duplicate Lead
This Option will prevent LeanData from routing to a Queue if a Queue happens to be the Owner of the Duplicate Lead.

- **Prevent Routing to Queues:** When you select this option, this node will not assign the incoming Lead to a Queue. You will have a fallback edge to determine what you would like to do with the incoming Lead instead.



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 User field on your Lead record instead of updating the Owner field.

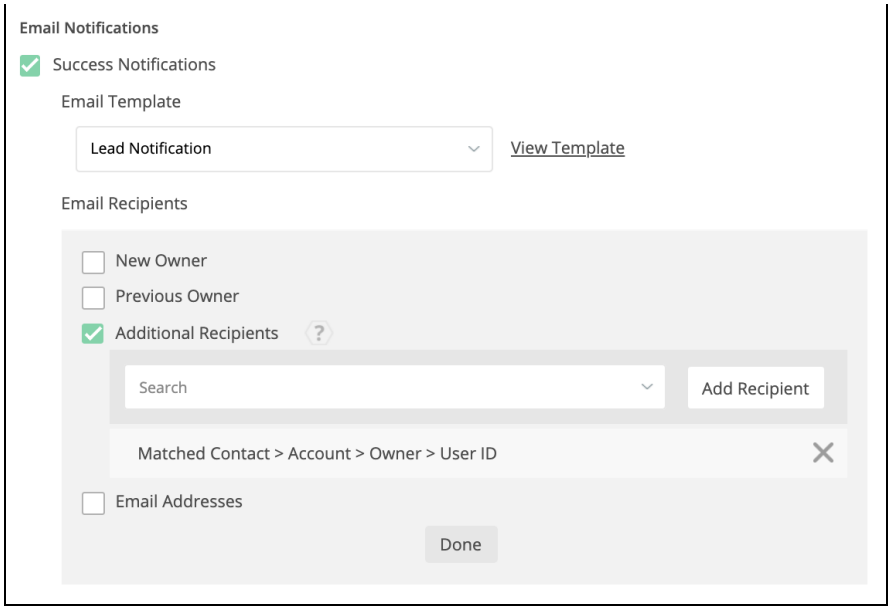
- **Assign Alternate Field Instead of Owner:** When you select this option you will see a drop-down menu to select the target field.

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.

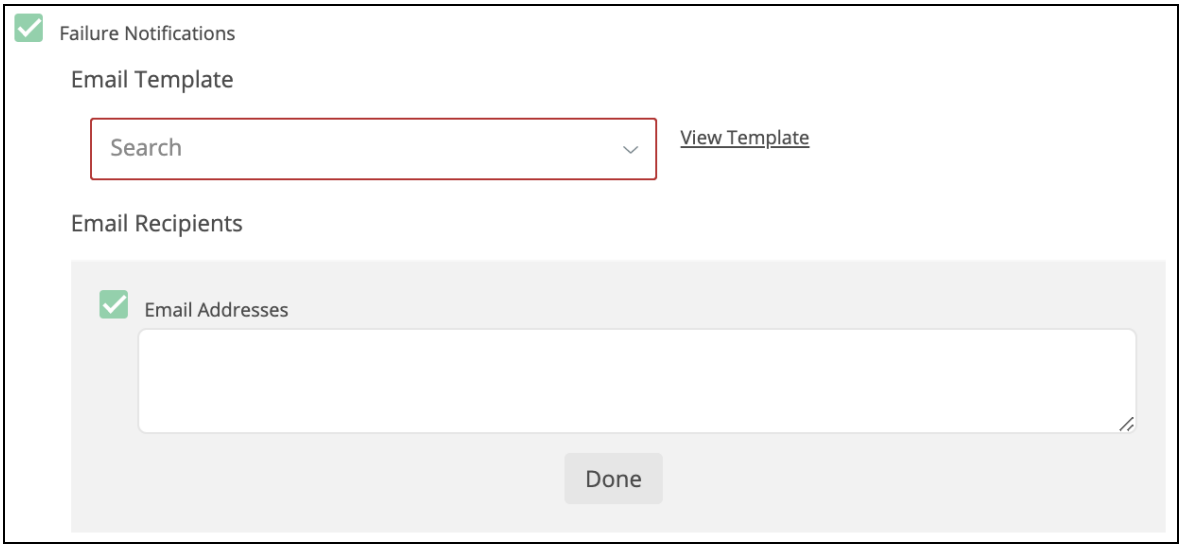
Email Notifications
The email notifications allow you to configure how the Route to Duplicate Lead node can notify Users of either a successful owner assignment or a failure. You can select an email template and list of recipients.

- **Success Notifications:** Use these settings to select an email template and Users to send a message that the Owner assignment was successful.
    - Select the desired Salesforce email template from the drop-down menu.
    - Use the View Template link to open the template in a new tab.
    - 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 any records matched earlier in the flow



- **Failure Notifications:** Use these settings to select an email template and Users to send a message that the Owner assignment was not successful.
  - Select the desired template from the drop-down menu.
  - Use the View Template link to open the template in a new tab.
  - 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.



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 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.
- **Queue Owned Duplicate Lead:** If you had selected the “Prevent Routing to Queues” option above, and the duplicate Lead owner is a queue, this fallback edge will direct the Lead to whatever steps you would like the Lead to take instead. By default this will be set to End of Flow.
- **Next Node:** This option allows the record to be directed 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 actions at this node instead of proceeding to another node.

Summary

The Route to Duplicate Lead Node will allow you to assign a Lead to a User related to the Duplicate Lead the incoming Lead 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 Lead Routing Guide: https://leandatahelp.zendesk.com/hc/en-us/articles/360016339074