LeanData Routing

Route to Matched Opportunity Node

Overview

The Route to Matched Opportunity Node gives you the ability to assign a routed record, to the owner of a matched Opportunity. This node is available in the following:

- Lead Router
- Contact Router
- Account Router
- Opportunity Router

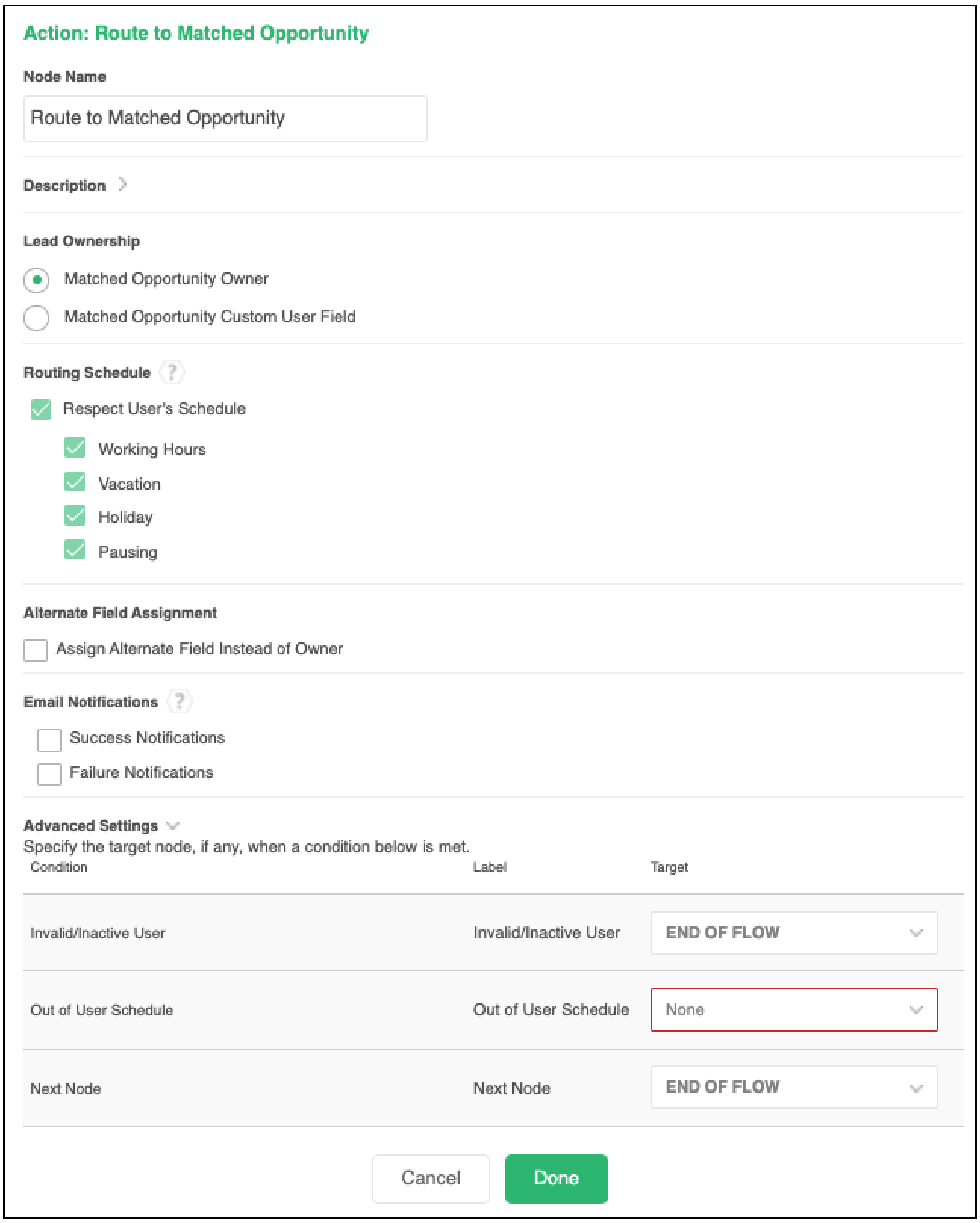
Example: *Emily is the LeanData Admin for GlobalWorld Development. She is currently building their Lead Router Flow. The goal of the flow is to get the Leads to the right owners. Using various nodes, she has filtered, matched the Leads and now needs to route them. When a Lead is matched to an opportunity, she uses the Route to Matched Opportunity to send the Lead to the ownership of the matched Opportunity.*

Please Note: The examples in this guide use Lead as the routed record but it applies to Contacts, Accounts, and Opportunities.

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Lead(Routed Record) Ownership
- Routing Schedule
- Alternate Field Assignment
- Email Notifications
- Advanced Settings

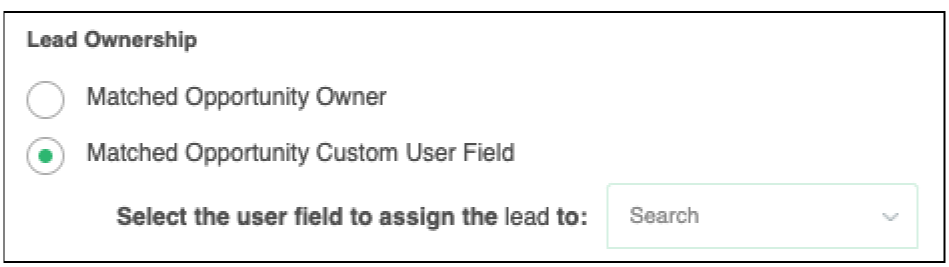


Node Name
By default, the Node Name is set to Route to Matched Opportunity. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the assignment. This will help others understand the purpose of the node. For our example, we would call this node, Assign to Opportunity Owner.

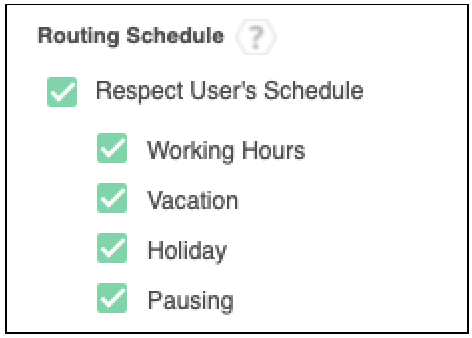
Description
This field is not required but we recommend adding a description to document any customizations made to the node. If someone else needs to take over the management of the flow, the description will help them to understand the goal of the customizations.

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

- **Matched Opportunity Owner:** This option lets you select the owner of the matched Lead as the owner of the routed record.
- **Matched Opportunity 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.

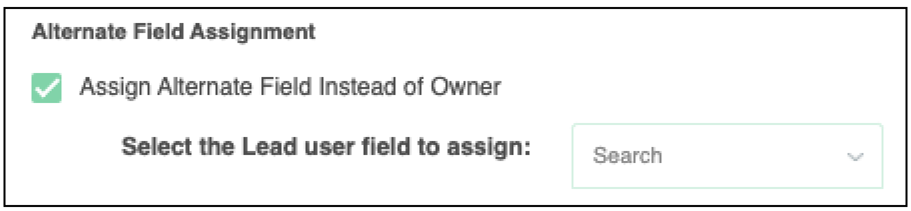


Routing Schedule
The Routing Schedule section gives you options on how to honor user schedules. You can configure each node to honor all schedule types or any combination as needed.



Alternate Field Assignment
This Option will tell LeanData to update another field on your routed record instead of updating the Owner field on the routed record.

- **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 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.

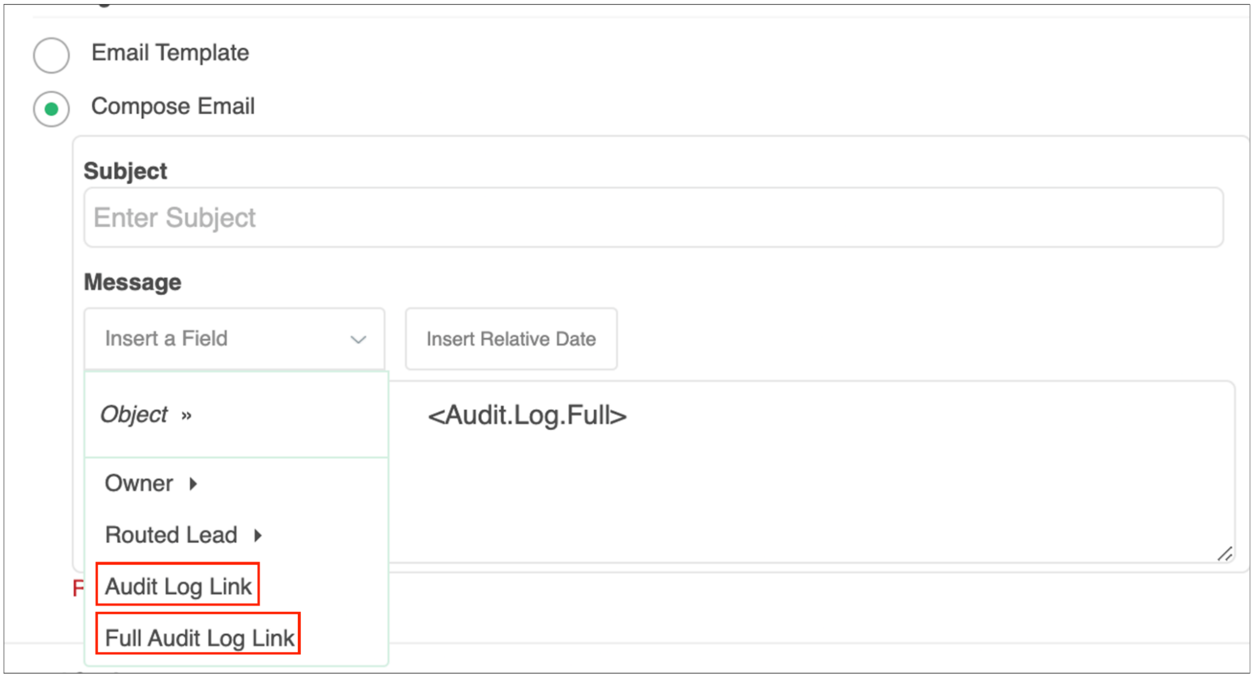
Email Template

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.

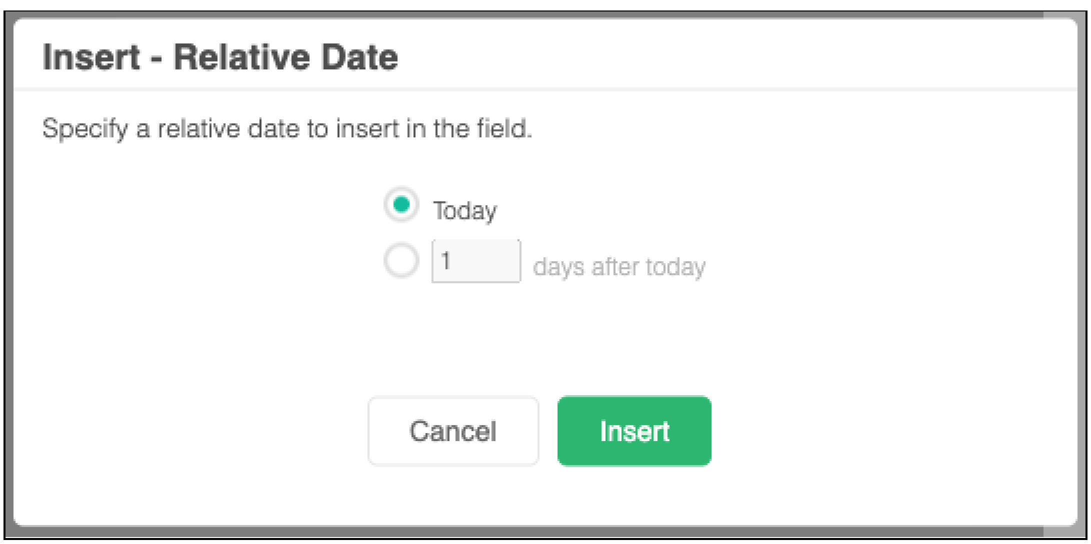
Compose Email

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 updating a different field on the routed record, 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