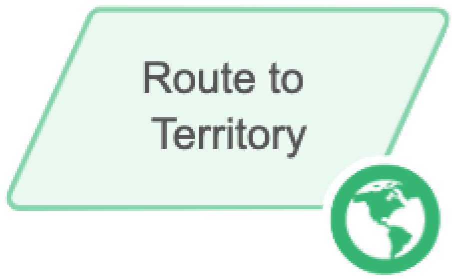
LeanData Routing

Route to Territory Node

Overview

The Route to Territory Node gives you the ability to assign a record to a User based on the Territory that they own.

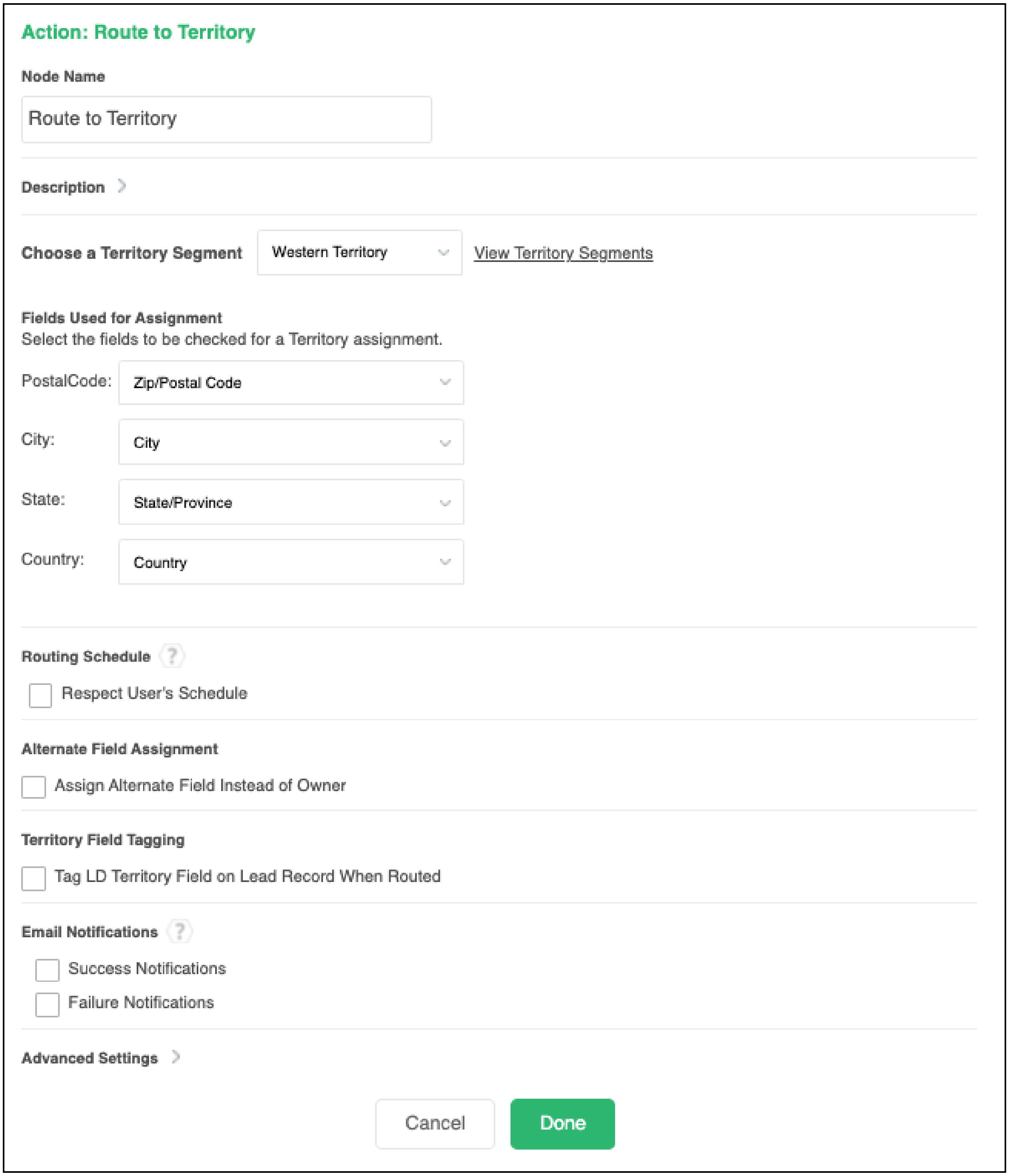


Example: *Lana is the LeanData Admin for GlobalWorld Software. She is currently building their Lead Router Flow. The goal of the flow is to get the Leads to the right owners. Using various nodes, she has filtered and matched most of the Leads to Accounts. For other Leads that do not match existing Accounts, she wants to route them to the correct user with territory based assignments.*

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Territory Segment
- Routing Schedule
- Alternate Field Assignment
- Territory Field Tagging
- Email Notifications
- Advanced Settings


Action: Route to Territory
Node Name
Route to Territory
Description
Choose a Territory Segment
Western Territory
View Territory Segments
Fields Used for Assignment
Select the fields to be checked for a Territory assignment.
PostalCode:
Zip/Postal Code
City:
City
State:
State/Province
Country:
Country
Routing Schedule
Respect User's Schedule
Alternate Field Assignment
Assign Alternate Field Instead of Owner
Territory Field Tagging
Tag LD Territory Field on Lead Record When Routed
Email Notifications
Success Notifications
Failure Notifications
Advanced Settings
Cancel
Done

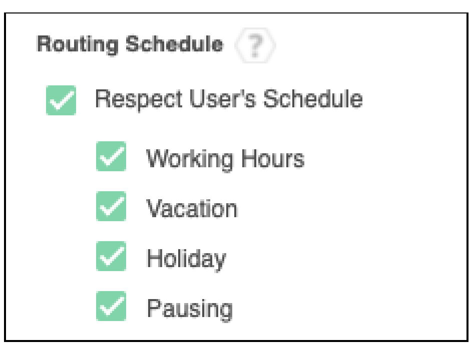
Node Name
By default, the Node Name is set to Route to Territory. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the assignment. This will help others understand the purpose of the node. For our example, we would call this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

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.

Territory Segment
The Territory Segment picklist allows you to pick the desired Territory Segment from a list of your available Territory segments. There is a link to view your territory segments in a new tab.

The Territory Segment picklist is only used to pick from the list of existing territory segments. For information on creating Territory Segments, please see our [Territory Management Overview Guide.]

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.

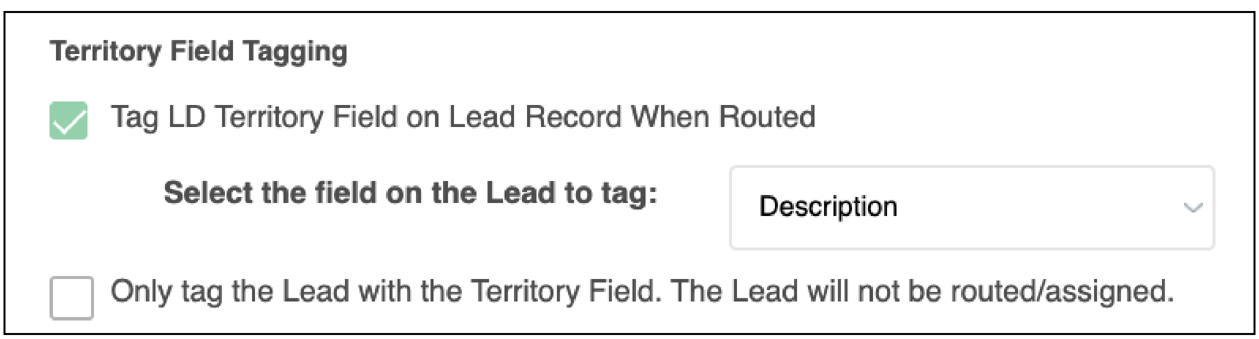


Alternate Field Assignment
This option will tell LeanData to update another field on your record instead of updating the Owner field on the record. When you check the Assign Alternate Field Instead of Owner option, you will not be updating the owner of the routed record but you will assign the User to another field selected on the routed record.

Please Note: The User assigned to the selected field in Alternate Field Assignment is the user selected by the Territory Assignment.

Territory Field Tagging
This option allows you to add the name of the Territory that was selected for the record. When the option Tag LD Territory Field on Lead Record When Routed is selected, you will see a picklist for the field on the record to update with the name of the territory.

If you want to **ONLY** tag the record with the Territory but **NOT** route or assign the record to a territory, select the option **Only tag the [record] with the Territory 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.

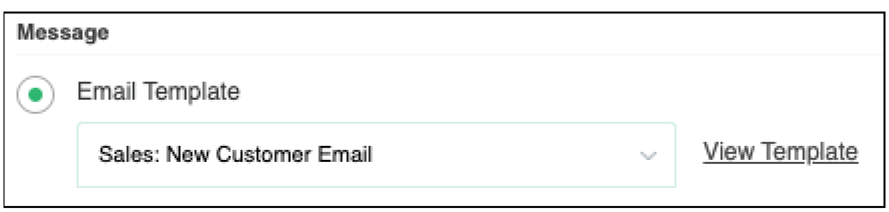
Message

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

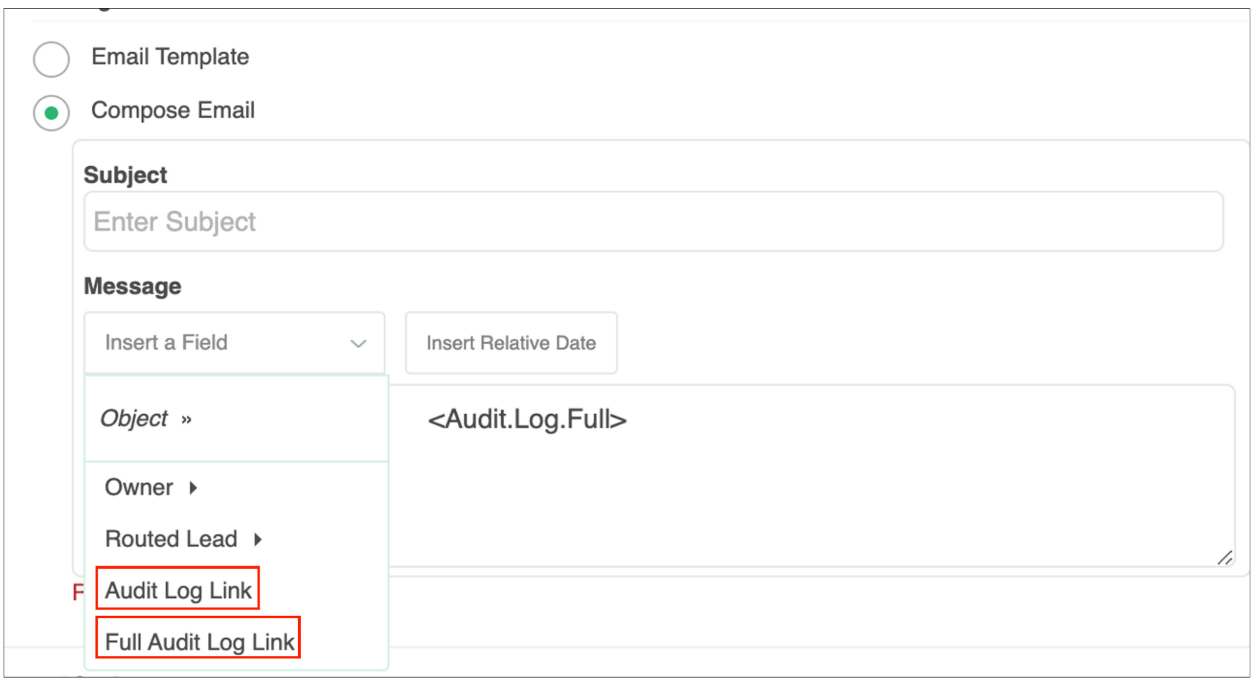
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



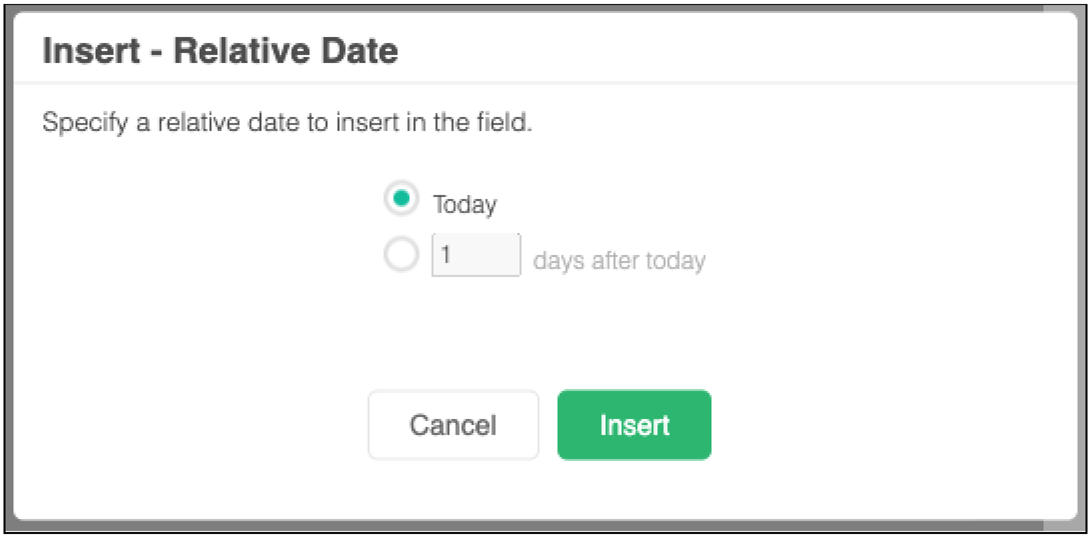
Compose Email

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.

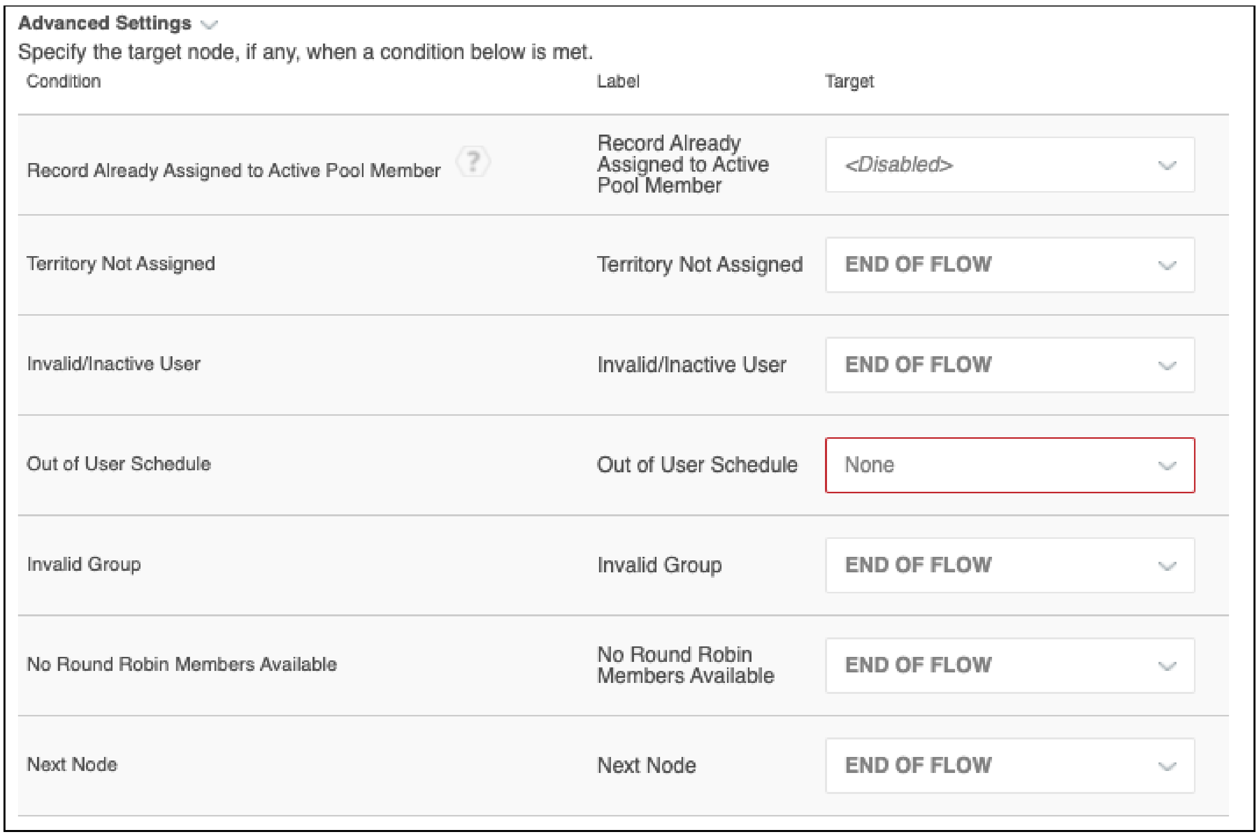


Advanced Settings
The Advanced Settings section gives you fallback options for the routed records and the ability to send the record to the next node of the flow as needed.

- **Record Already Assigned to Active Pool Member:** When a routed record is already assigned to an active member of the Round Robin Pool, LeanData would typically route the record to the next available pool member. The Target for this edge is set to <*Disabled*> by default to maintain this behavior. If you would prefer that LeanData take no action, this fallback edge can be directed to the **End of Flow** option to take no action, or directed to another target node if you would like to take a different action.
- **Territory Not Assigned:** When there is no correct territory based on the Territory Segment, the routed record will follow this fallback edge.
- **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.
  Capping Conditions Unmet: This is a fallback condition in the event that the routed record does not meet the capping conditions on the Round Robin Pool. By default, this is set to End of Flow.
- **Invalid Round Robin Pool:** This is a fallback condition in the event that the selected Round Robin Pool is invalid at the time of the routing. By default, this is set to End of Flow.
- **No Round Robin Members Available:** This is a fallback condition in the event that there are no available Round Robin members available to be assigned the routed record. This can be caused by schedules, vacations or holiday sets. By default, this is set to End of Flow. For more information on User Schedules please see our Schedules, Capping, and People Guide:

https://leandatahelp.zendesk.com/hc/en-us/articles/360024769133-Routing-Schedules-Capping-People-Guide

- **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 a Lead into a Contact, updating a different field on the 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 Territory Node allows you to assign a routed record to a User related to the Territory the record has matched to. This node allows you to control how to assign the owner of the routed record as well as tools for sending notifications on success or failure of the assignment. There are also fallback conditions to manage how to route the record in case the territory is not assigned..

For more information on working with router flows please see our Lead Routing Guide: https://leandatahelp.zendesk.com/hc/en-us/articles/360016339074