

LeanData Routing

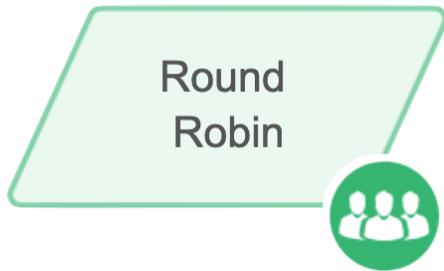
Round Robin Node



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Overview

The Round Robin Node gives you the ability to assign a routed record to a member of a Round Robin Pool. Pools are groups of users that can receive records on a rotational pattern. The Round Robin Node has options for picking a Round Robin Pool for the routed records. Pools are defined on the side menu of LeanData under Routing-> Round Robin-> Pools. Your pools should be defined before adding the Round Robin node to your Router Flow.



Example: *Melanie is the LeanData Admin for OnPoint Communications. She is currently building their Lead Router Flow. The goal of the flow is to get the Leads to the right owners. When a routed Lead does not have an account match OnPoint wants to send the lead to a Round Robin pool for distributing the leads to a pool of reps in a rotation.*

Customization

You have a number of options to configure the node.

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

Action: Round Robin

Node Name

Description >

Lead Ownership
Specify the Round Robin pool used to assign lead ownership.

Round Robin Pool: [View Pools](#)

Alternate Field Assignment

Assign Alternate Field Instead of Owner

Email Notifications

Success Notifications

Failure Notifications

Advanced Settings >

Node Name

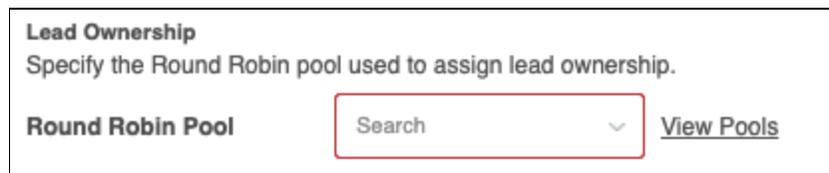
By default, the Node Name is set to Round Robin. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the assignment. This will help others understand the purpose of the node. For our example, we would call this node, Assign to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

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 a setting for picking the desired Round Robin pool for assigning the owner to the routed record. Use the pull-down menu to select the pool for the Lead assignment.

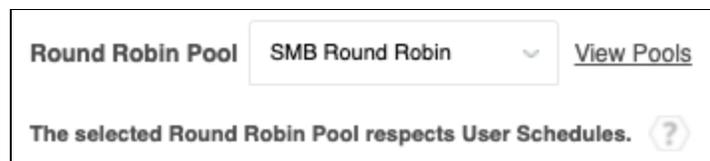


Lead Ownership
Specify the Round Robin pool used to assign lead ownership.

Round Robin Pool ▼ [View Pools](#)

User Schedules

One of the settings on a Round Robin Pool is to respect user schedules. If a pool is set to respect user schedules, you will see a comment below the Pool selection: The selected Round Robin Pool respects User Schedules. Any leads routed to the pool will check the pool member's schedules to determine if they are working to receive the lead.



Round Robin Pool ▼ [View Pools](#)

The selected Round Robin Pool respects User Schedules. ?

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>

For more information on setting up Round Robin pools, see our Round Robin Guide:

<https://leandatahelp.zendesk.com/hc/en-us/articles/360016462273-Routing-Round-Robin-Overview>

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.

Please Note: In order to use the Alternate Field Assignment, you must select the Round Robin Pool 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

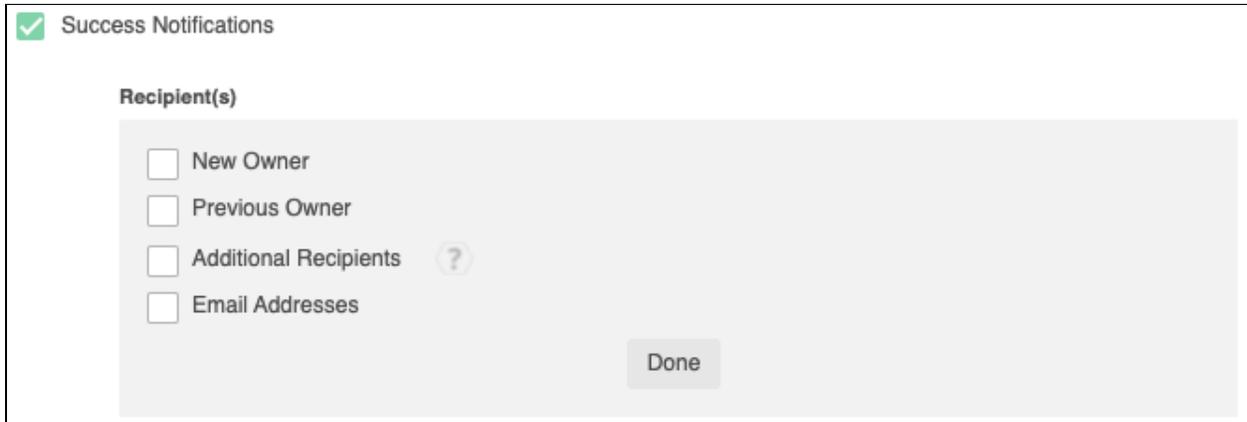
Please Note: The only difference between the Success Notification and the Failure Notification is what triggers the message. If you wish to use both, you will need to configure both types of messages to send.

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.

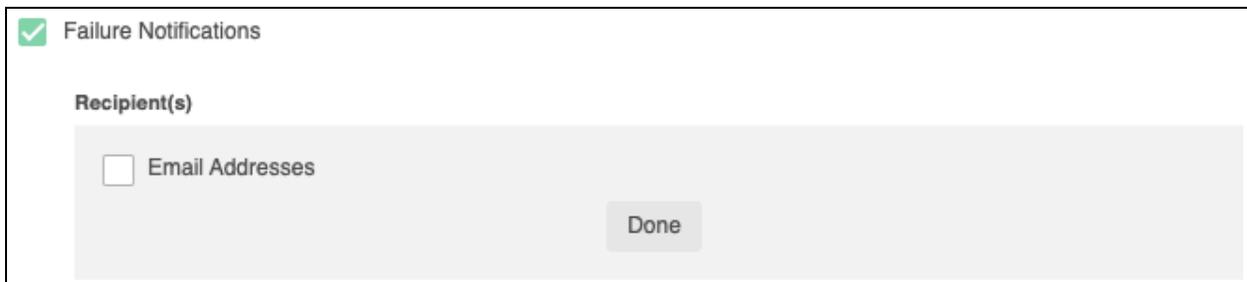
- **Additional Recipients** - This option lets you send the notification to a User on the Lead or on the matched Account (if there is one previously matched in the flow).



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 heading "Recipient(s)" is displayed. A light gray rectangular area contains 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 this area is a "Done" button.

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 heading "Recipient(s)" is displayed. A light gray rectangular area contains one option with an unchecked checkbox: "Email Addresses". At the bottom right of this area is a "Done" button.

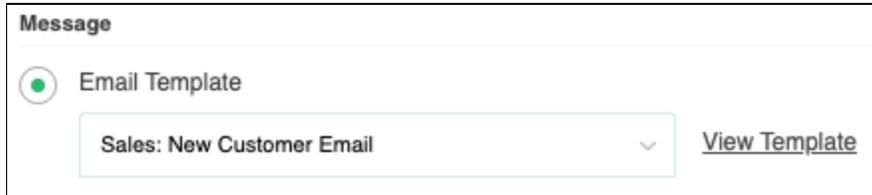
Message

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

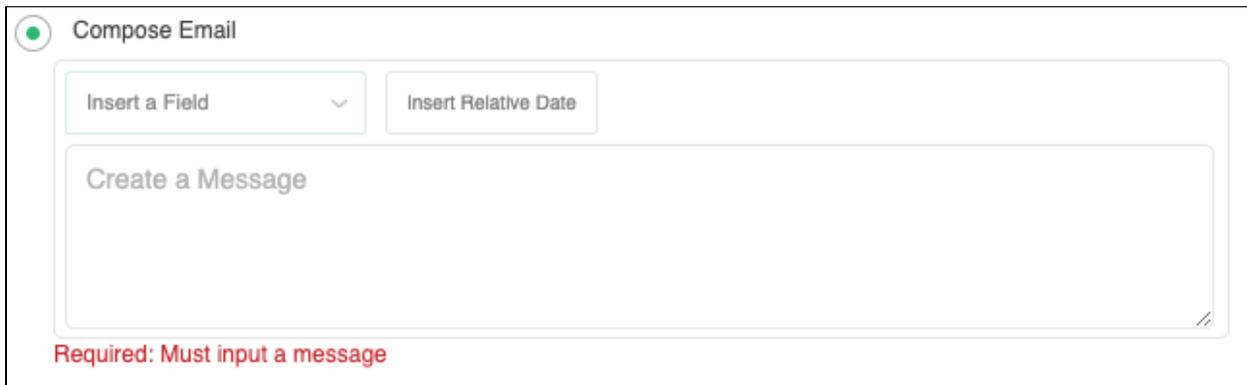
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



The screenshot shows a 'Message' section with a radio button selected for 'Email Template'. Below this is a dropdown menu showing 'Sales: New Customer Email' and a 'View Template' link.

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.



The screenshot shows the 'Compose Email' section. It includes a radio button, an 'Insert a Field' dropdown menu, and an 'Insert Relative Date' button. Below these is a large text area with the placeholder 'Create a Message'. A red error message at the bottom reads '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 »

Owner ▶

Routed Lead ▶

Audit Log Link

Full Audit Log Link

<Audit.Log.Full>

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

1 days after today

Cancel **Insert**

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.

Advanced Settings ▼		
Specify next node, if any, when a condition below is met.		
Condition	Label	Target
Record Already Assigned to Active Pool Member	Record Already Assigned to Active Pool Member	<Disabled> ▼
Invalid Round Robin Pool	Invalid Group	END OF FLOW ▼
No Round Robin Members Available	No Round Robin Members Available	END OF FLOW ▼
Capping Conditions Unmet	Capping Conditions Unmet	END OF FLOW ▼
Next Node	Next Node	END OF FLOW ▼

- 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.
- 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>

- **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.
- **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

LeanData's Round Robin Node is a great way to distribute Routed Records among a group of users in a rotation pattern. The Node includes options for assigning a record owner or an alternate field. The node also includes fallback edges to route the record if there are no available pool members or if the pool has been removed.

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