

LeanData Routing

Update Lead Node Guide



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Overview

The Update Lead Node gives you the ability to populate 1 or more fields on a Lead record with a specific value or a value from another field. This node can only populate fields that are editable.



Example: David is the LeanData administrator for Lighthouse Development. One of the requirements for the Router flow is to be able to report on Leads after they are routed. Lighthouse Development needs to be able to report on which Leads have been assigned to sales reps and which ones are still unassigned. David adds a custom field to the Leads called Assignment Status. He then adds an Update Lead Node to fill in the field with the value Assigned to Rep at the end of the Router flow.

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Options
- Email Notifications
- Advanced Settings

Action - Update Lead

Node Name

Description >

Update Lead Fields
Specify lead fields and values to update.

Field	New Value	
<input type="text" value="Search"/>	<input type="text" value="Enter Value"/>	<input type="button" value="Insert"/> <input type="button" value="−"/>

Add field

Email Notifications

Success Notifications

Failure Notifications

Advanced Settings >

Node Name

By default, the Node Name is set to Update Lead. You can change this label to anything you need. We strongly recommend giving this node a meaningful name.

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.

Update Lead Fields

The Update Lead Fields section gives you the ability to update 1 or more fields on the Lead record. There is one field in the section by default, but you can add as many fields as you need to update. For each field, you will have a Field drop-down to select the field to update and a New Value field to enter the value that will update the record. You can enter a static value, an inserted value from a matched record, or a combination of both.

Use the + next to Add Field to add additional fields to update.



Update Lead Fields
Specify lead fields and values to update.

Field	New Value		
Company	{!matched lead.company}	Insert	⊖

For picklist values, if you would like to clear out the value, you can select the <No Value> option at the top of the picklist.



Update Lead Fields
Specify lead fields and values to update. (?)

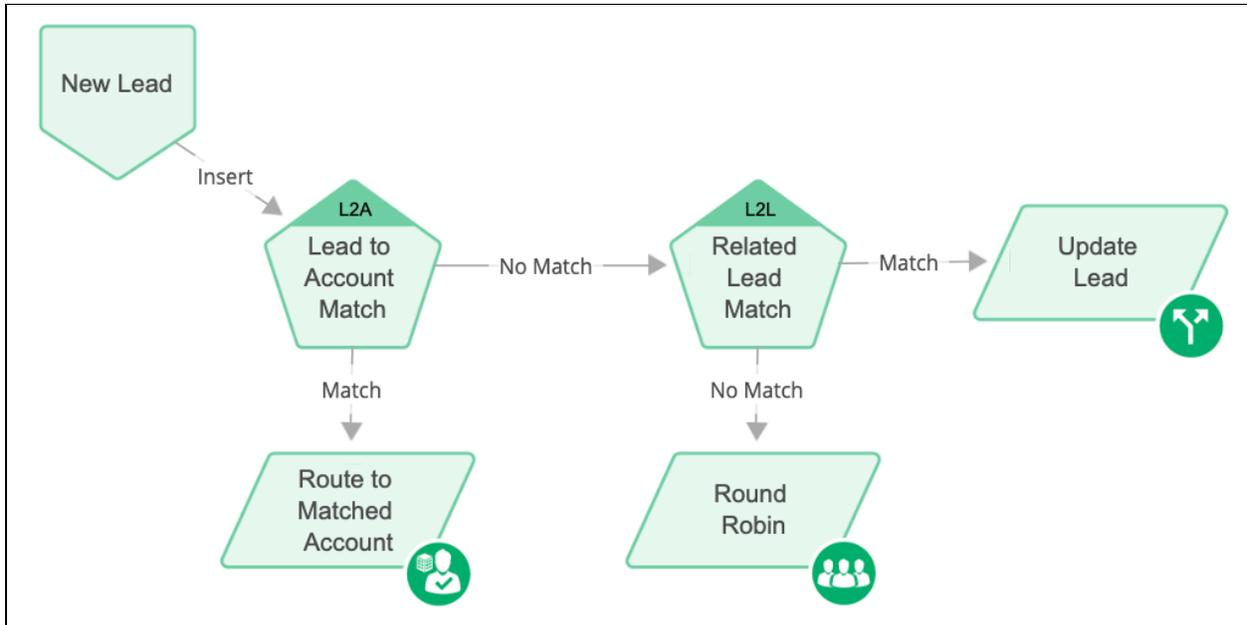
Field	New Value		
Status	< No Value >	Insert	⊖

Merge Fields

The Merge Field feature allows you to insert a value from another field onto the Lead field you are updating. Fields on any matched objects are available, as well as any fields directly on the routed record.

Use Case

LeanData matches Leads to existing Accounts, Opportunities, Contacts, and other Leads. This feature can help identify Leads that are missing Accounts in Salesforce. When a Lead does not match to an Account but does match to another Lead, you can tag a custom field with the company name. This way, you can report on Leads that fall under the same company name, identify missing Accounts, and create them as needed.

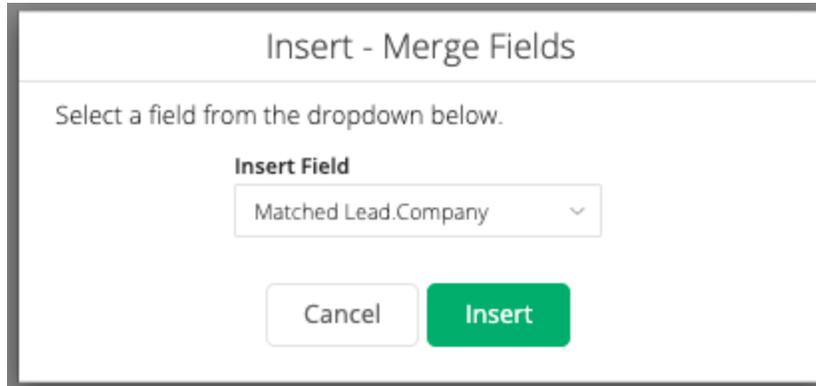


In the flow above, the routed Lead is first checked for a matching Account. If it does not match to an existing Account, the Lead is checked for related Leads. Then the Lead's Company name is updated, making it easy to group the related Leads together for reporting.

Example: Kevin has discovered that some leads are coming through the Router flow without matching to an existing Account but they do have related leads. Kevin creates a field on the Lead record, Account to Be. Using the Merge Field feature, he can update this field with the Company name from a related Lead. David can then run a report, based off of the Account to Be field, to group related Leads and identify Accounts to be created.

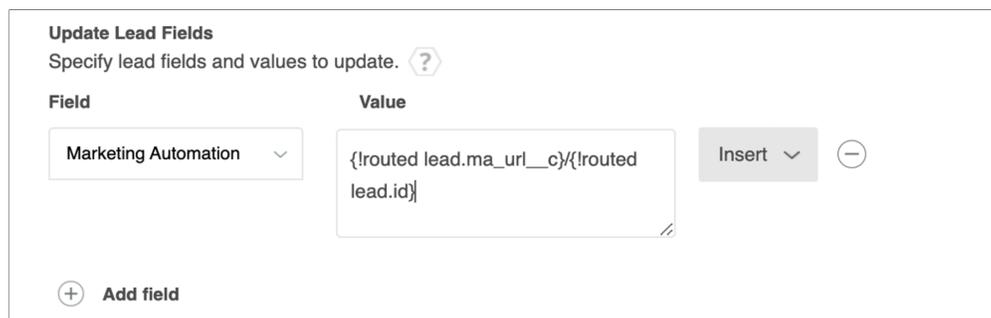
Update Lead Fields
Specify lead fields and values to update.

Field	New Value	
<input type="text" value="Account to Be"/>	<input type="text" value="{!matched lead.company}"/>	<input type="button" value="Insert"/> <input type="button" value="−"/>
<input type="button" value="+ Add field"/>		<input type="button" value="Merge Fields"/>



You can use a merge field by itself or in combination with a static value. To use a Merge Field with a static value, enter the static value and then insert the merge field. Select Insert→Merge Fields. From the pop-up select the field to insert from a related lead. In our example, this field would be the Company Name.

You can also use merge fields to populate URL fields using specific components of the record, such as the Lead Id. This is useful for linking to a record that requires the record ID in the URL.



Relative Date Stamp

In addition to the Merge Fields, you can also update a routed record with a relative date. When you select a date field from the field pull-down menu, you will have the option to insert a relative date into the field.

Update Lead Fields
Specify lead fields and values to update.

Field	New Value		
Lead Status Changed Date/Time ▾	Enter Value	Insert ▾	⊖
<input type="button" value="⊕ Add field"/>		<div style="border: 1px solid gray; padding: 2px;"> Merge Fields Relative Date </div>	
Email Notifications			

Example: Lana is the LeanData admin and has been tasked to edit the Lead Router so that when a lead is assigned to a sales rep, the Lead Status is updated and the Lead is stamped with the Date the status changed. She adds the Update Lead Node to the router flow. She then configures the Node to update the Status field to Open - Not Contacted and add the relative date stamp to the Lead Status Changed Date/Time field.

In the pop-up window you can select to use **Today's Date** or **XX** number of days before / after today.

Insert - Relative Date

Specify a relative date to insert in the Email Bounced Date field.

Today (Now)

 1 Day(s) After Today

Merge Fields for URLs

URL fields can now be updated using merge fields! You now have more flexibility when populating URL information on Leads with the ability to create a unique URL for any record that gets routed. This can help you and your reps save time when searching for account information, troubleshooting routing, or synchronizing information across systems.

This new functionality can be found in Update nodes within any FlowBuilder graph.

Use Cases

Marketing Automation: Create a unique URL for the Lead in a different system by combining a prefix for marketing automation appended with the ID of the record in the Marketing Automation.

Audit Log Links: LeanData admins and reps can insert the full audit log link in a URL field for full visibility into the routing path a record took.

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).

Success Notifications

Recipient(s)

- New Owner
- Previous Owner
- Additional Recipients ?
- Email Addresses

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.

Failure Notifications

Recipient(s)

- Email Addresses

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.

Message

Email Template

Sales: New Customer Email ▼ [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 »

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.

- **Next Node:** This option allows the record to be directed to another node in the Router Flow after the Lead has been updated. This can include things like Converting the Lead into a Contact, Creating an Account, etc. You can also set this node to End of Flow. This will stop all LeanData actions at this node instead of sending it to another node.

Summary

The Update Lead Node gives you a powerful tool for updating fields on a Routed Lead record. You can update 1 or more fields with a static value, a value from a related record, or a combination of both. You can also update a date field with a relative date such as stamping the lead record with the date it was routed. This node can only update fields that are editable.

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