

LeanData Routing

Assign Account Team Members
Node Guide

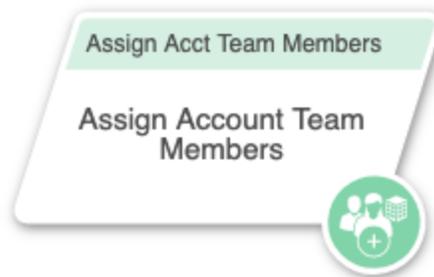


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Overview

The Assign Account Team Members Node gives you the ability to add and replace members of an Account Team in the Account Router. You have the option to add/replace Account Team members with 1 or more Account Team members based on criteria in the Assign Account Team Members Node.

Please Note: When LeanData assigns Account Team Members, Read/Write access is automatically given to the Account and any associated Opportunities and Cases.



Example: Anna is the LeanData administrator for Lighthouse Development. As part of the Account Router, Anna needs to replace the members of the Account Team based on when the lead is coming from. She wants to ensure that the account team includes someone local to the Account. She places the Assign Account Team Members Node in her flow and configures the node to add an SDR based on the location of the account.

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Assign Team Members
- Email Notifications
- Advanced Settings

Action: Assign Account Team Members

Node Name

Description >

Assign Team Members Replace Existing Account Team Members in Selected Roles ?

Team Member	Role
Click 'Add Team Member' to begin assigning Account Team Members	

Add Team Member

Email Notifications ?

Success Notifications

Failure Notifications

Advanced Settings >

Node Name

By default, the Node Name is set to Assign Account Team Members. You can change this label to anything you need. We strongly recommend giving this node a meaningful name so that the purpose of this node is easily determined by someone viewing the graph. This will help others understand the purpose of the node. For our example, we might call this node, Update Account to Routed.

Description

This field is not required but we recommend adding a description to document any

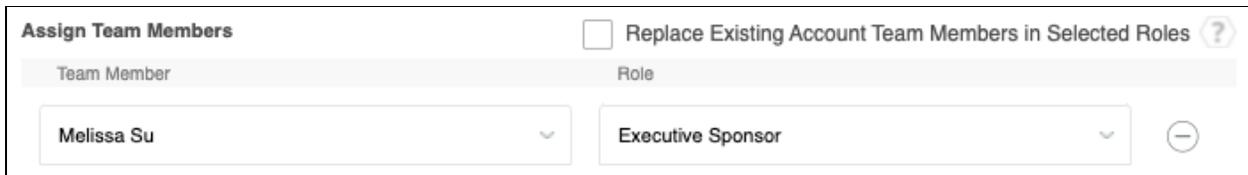
customizations made to the node. If someone else needs to take over the management of the flow, the description will help them to understand the goal of the customizations.

Assign Team Members

The Assign Team Members section gives you the ability to add or replace members of an Account Team in the router graph. You can select specific people or users found in fields on the Routed Account.

To assign a specific user to an Account Team:

1. As needed, log into Salesforce and open the desired Account Router Graph.
2. Drag the Assign Account Team Members action node onto the canvas.
3. Position the node in the desired place of the graph, as needed.
4. Open the node for editing.
5. Click Add Team Member.
6. Select Specific user.
7. Select the desired user from the Select Specific User pull-down menu.
8. Select the desired role from the Select Role pull-down.
9. Add additional team members as needed.
10. Click Done to save.



The screenshot shows the 'Assign Team Members' configuration panel. At the top left is the title 'Assign Team Members'. To the right is a checkbox labeled 'Replace Existing Account Team Members in Selected Roles' with a question mark icon. Below this are two columns: 'Team Member' and 'Role'. Under 'Team Member', there is a dropdown menu with 'Melissa Su' selected. Under 'Role', there is a dropdown menu with 'Executive Sponsor' selected. To the right of the 'Role' dropdown is a minus sign icon.

To assign a specific user to an Account Team:

1. Open the desired Account Router Graph.
2. Drag the Assign Account Team Members action node onto the canvas.
3. Position the node in the desired place of the graph, as needed.
4. Open the node for editing.
5. Click Add Team Member.
6. Select User Field on Routed Record.
7. Select the desired user field from the Select User Field on Routed Record..
8. Select the desired role from the Select Role pull-down.
9. Add additional team members as needed.
10. Click Done to Save.

Assign Team Members Replace Existing Account Team Members in Selected Roles ?

Team Member	Role
Melissa Su	Executive Sponsor
Select User Field on Routed Account	Select Role

Account »

- Created By ▶
- Et D&B Company ▶
- LD Business Unit ▶
- Last Modified By ▶
- Master Record ▶
- Al Owner ▶
- Parent Account ▶

Cancel
Done

Replace Existing Account Team Members in Selected Roles

Selecting the option Replace Existing Account Team Members in Selected Roles will add the selected user(s) to the team and remove all existing team members from the same role(s).

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

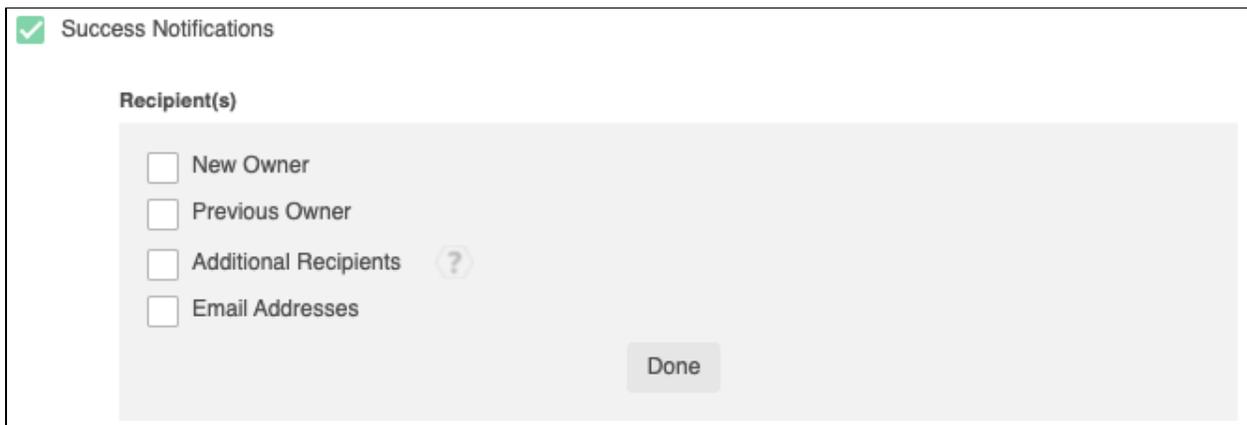
Please Note: The only difference between the Success Notification and the Failure Notification is what triggers the message. If you wish to use both, you will need to configure both types of messages to send.

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

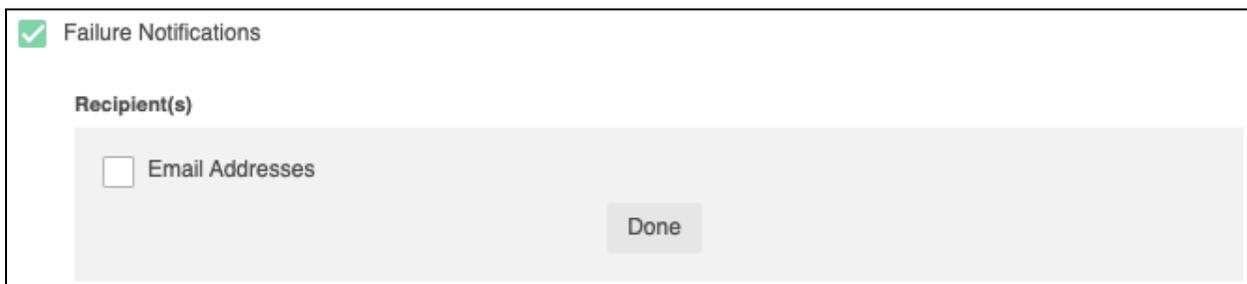
Recipient(s)

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

Done

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

Done

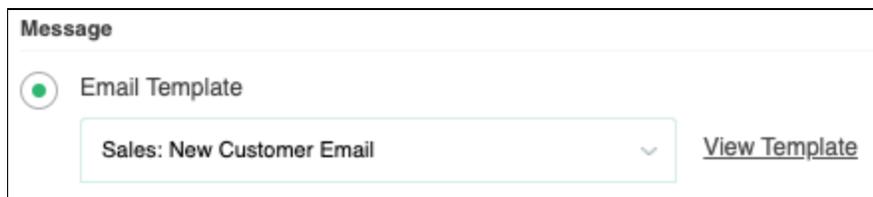
Message

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

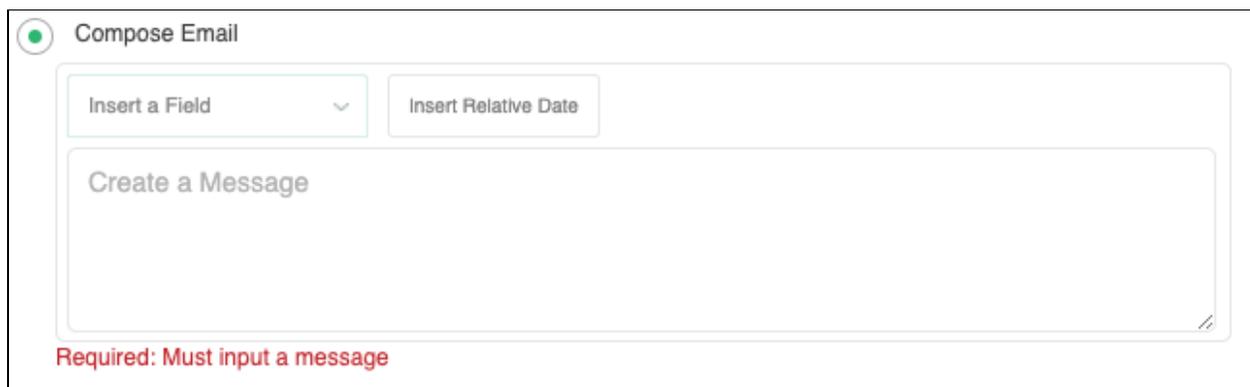
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



The screenshot shows a 'Message' section with a radio button selected for 'Email Template'. Below this is a dropdown menu currently displaying '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 features two buttons: 'Insert a Field' and 'Insert Relative Date'. Below these is a large text area with the placeholder text 'Create a Message'. At the bottom of the text area, there is a red error 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.

- **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
- **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 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.

Advanced Settings ∨		
Specify next node, if any, when a condition below is met.		
Condition	Label	Target
Invalid/Inactive User	Invalid/Inactive User	END OF FLOW ∨
Next Node	Next Node	END OF FLOW ∨

Summary

The Assign Account Team Members Node gives you a powerful node with the ability to add and replace members of an Account Team in the Account Router. You have the option to add/replace Account Team members with a specific set of users in fields on the Routed Account.