LeanData Routing

Create Account Node Guide

Overview

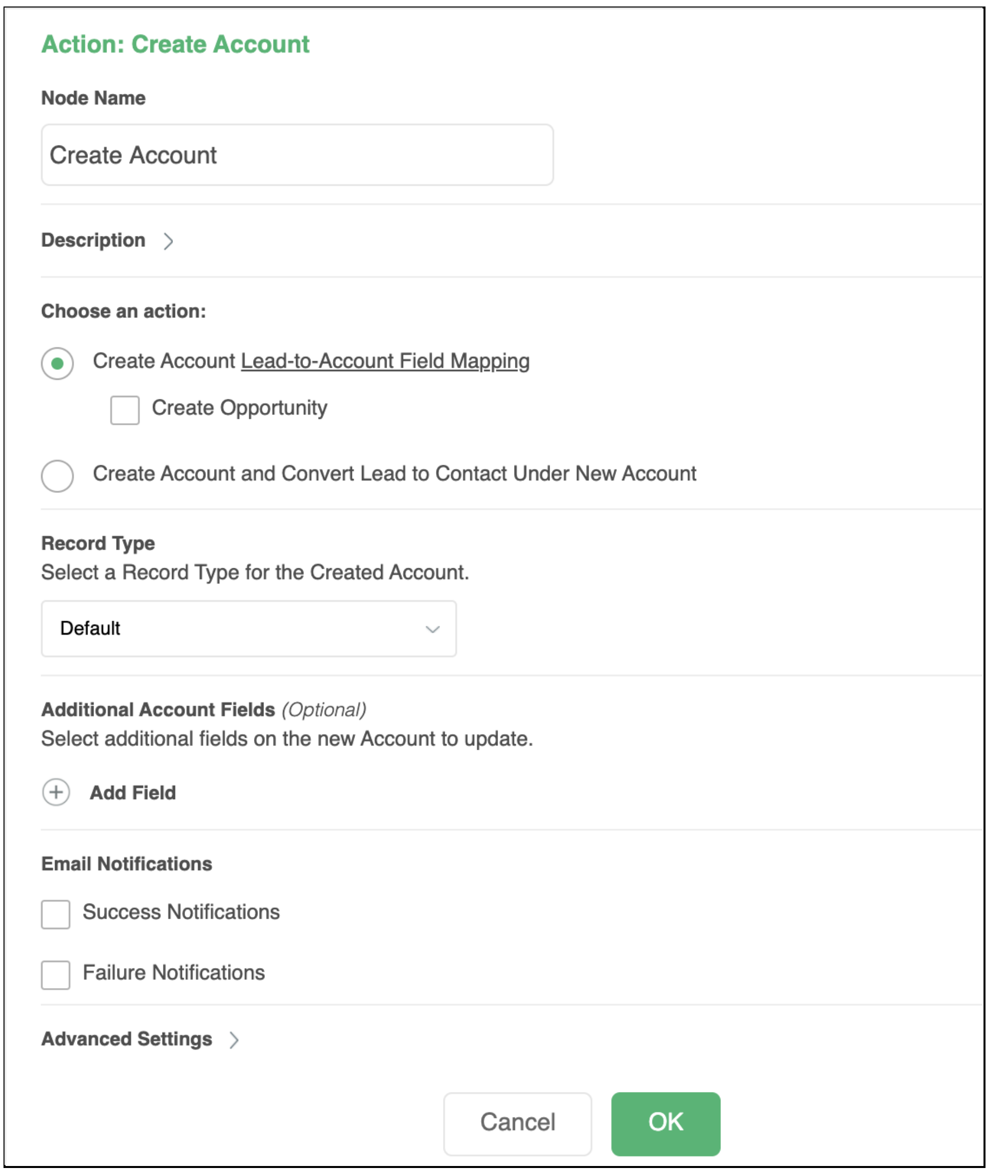
The Create Account Node is designed to create Accounts automatically as part of your Router flow. The Account is created based on the information on the routed Lead record. There are multiple options to configure how the Account should be created and assigned to an owner. The new account will be owned by whoever owned the routed Lead.

Example: *David is the LeanData admin for Lighthouse Development. He is using Lead Router to automate their Lead management. When a qualified Lead is routed through their Lead Flow and it does not match to an existing Account David wants the router flow to create a new Account from the Lead information. David adds a Create Account Node to automatically create an Account from the routed Lead.*

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Action
- Record Type
- Additional Account Fields
- Email Notifications
- Advanced Settings



Node Name
By default, the Node Name is set to Create Account. 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.

Action
The action section has 2 options for how the node should work:

- **Create Account:** Use this option to create a new Account record without converting the original Lead. The Account information will be based on the information from the Routed Lead and the Lead-to-Account Field Mapping.
    - Click on **View Lead-to-Account mapping** to view how the Lead information will be translated into the new Account record. The Lead-to-Account mapping will open in a new browser tab.
    - You can also get to the the Lead-to-Account Field Mapping in the LeanData dashboard under Routing → Lead → Advanced Settings → Account Creation.
    - An Opportunity can also be created by checking the “Create Opportunity” checkbox.
- **Create Account and Convert Lead to Contact Under New Account:** Use this option to build an Account record from the Routed Lead and then convert the routed Lead to a Contact under the newly created Account record.
    - **Please Note:** This option uses the native Salesforce Lead-Account mappings and not the user defined LeanData mapping. If you want to accomplish this with the LeanData mapping use the Create Account option and then convert the Lead in the next router node.
    - **Converted Lead Status:** Use this option to set the Status on the converted Lead. This is a required field when converting a Lead.
- **Record Type:** This option will allow you to select a Record Type of your choosing before the Account is created.
- **Additional Account Fields**: Values can be set for specific fields for the account that is going to be created. You will have the option to enter static values, or dynamically stamp information from the routed record onto the Account 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.

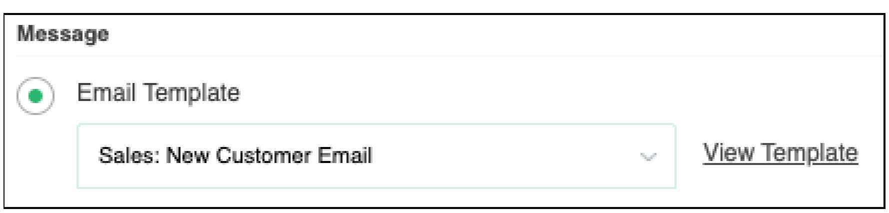
Message

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

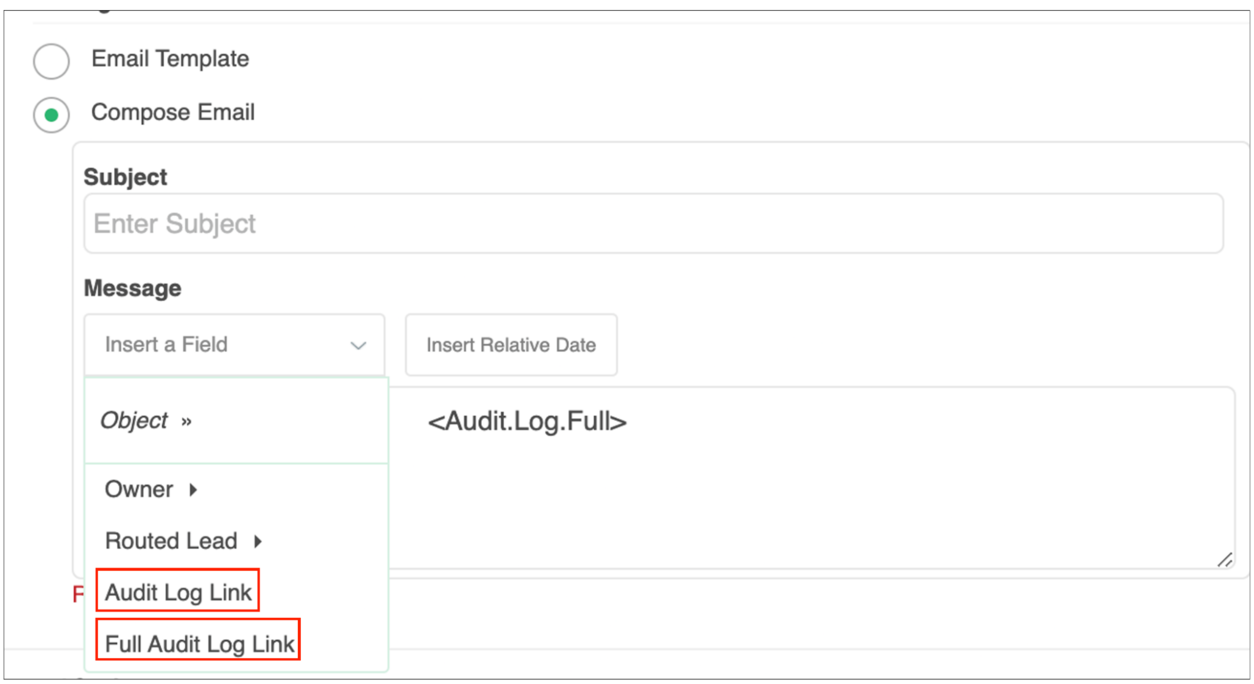
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



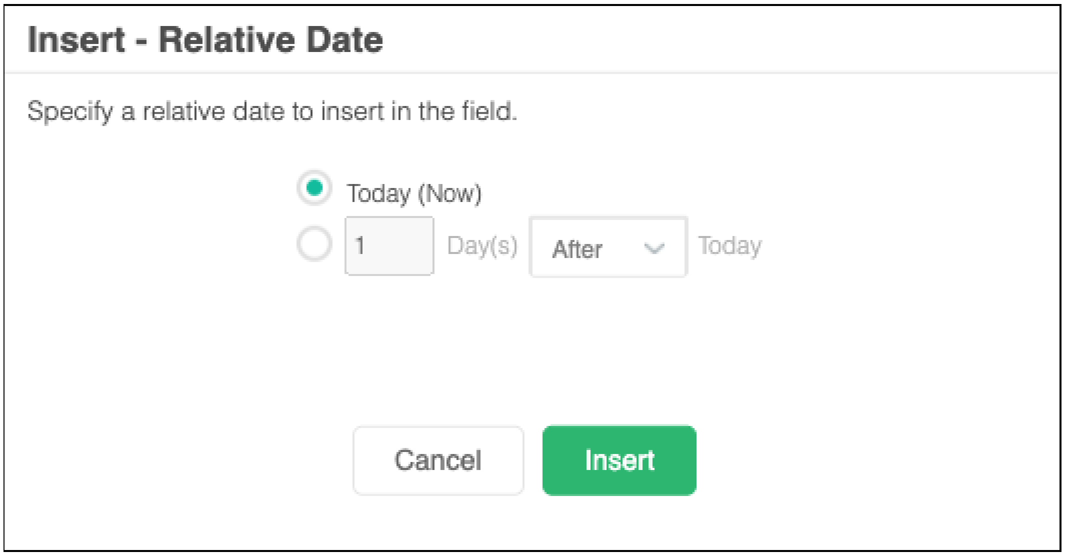
Compose Email

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.



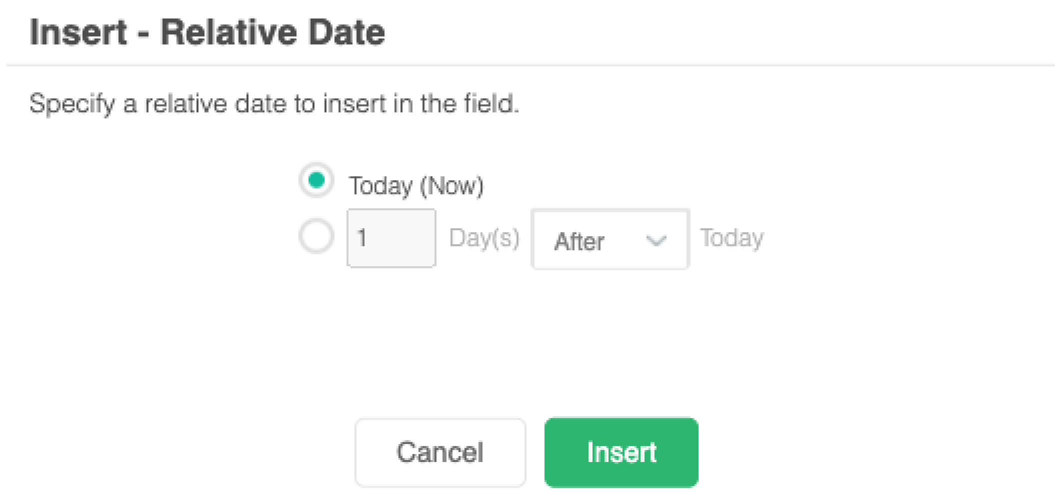
Use the Insert Relative Date to add the date the record was routed or a set number of days before or after the date the record was routed.

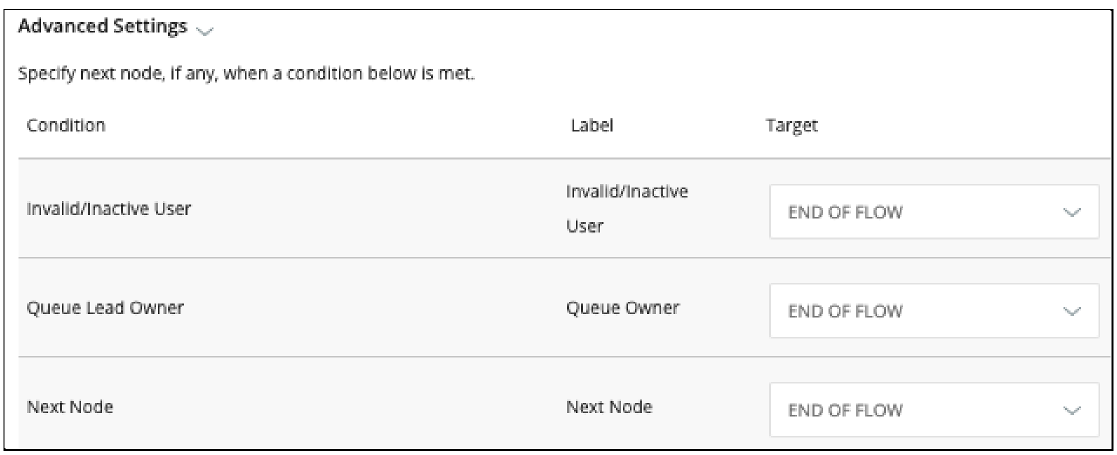


Advanced Settings

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 intended Owner is not active or invalid at the time of the routing. By default this will be set to End of Flow
- **Queue Lead Owner:** This is a fallback condition in the event you are attempting to create an Account off a queue owned Lead. Native Salesforce functionality does not allow Accounts to be owned by queues, only users.
- **Next Node:** This option allows the record to be routed to another node in the Router Flow after the Account has been created. 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.





Things to Know & Best Practices

- Make sure you have tight Lead rules and filters to create Accounts only based off qualified Leads and Contacts.
- If you want to use the user-defined mapping fields in LeanData when creating an Account with this node, choose Create New Account and then convert the Lead in the next node. If you use Create New Account and Convert Lead to Contact Under New Account, you will use SFDC’s native Leads to Account conversion settings.
- The new account will be owned by whoever owns the routed Lead.

Summary

The Create Account Node is a powerful automation tool for creating a new Account from the information on a routed Lead. This node includes options to create a new Account, convert the routed Lead and even create an Opportunity record on the newly created Account.

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