

LeanData Routing

Create Account Node Guide



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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

Action: Create Account

Node Name

Description >

Choose an action:

Create Account Lead-to-Account Field Mapping

Create Opportunity

Create Account and Convert Lead to Contact Under New Account

Record Type

Select a Record Type for the Created Account.

Additional Account Fields *(Optional)*

Select additional fields on the new Account to update.

Add Field

Email Notifications

Success Notifications

Failure 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:

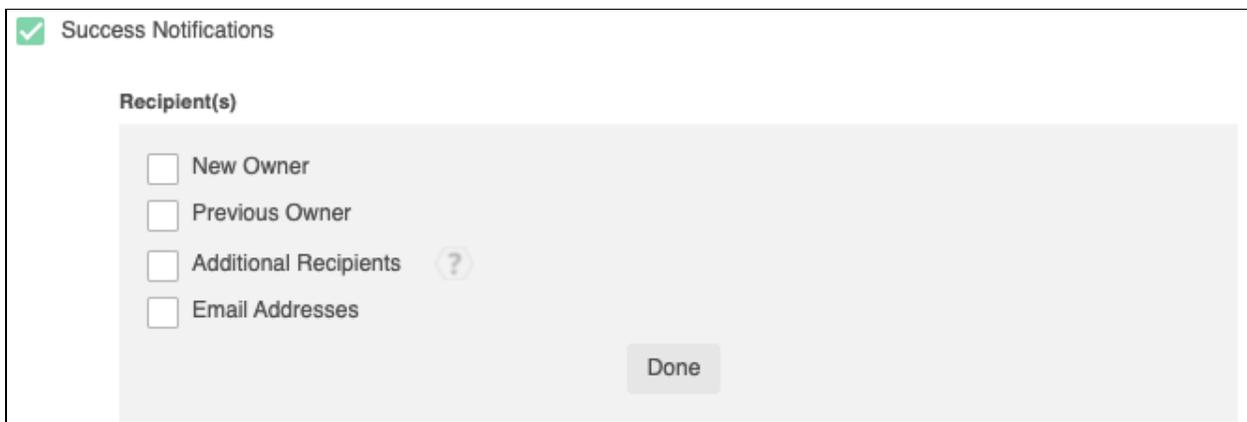
- Pick the recipients
- Select an existing template or compose an email

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:

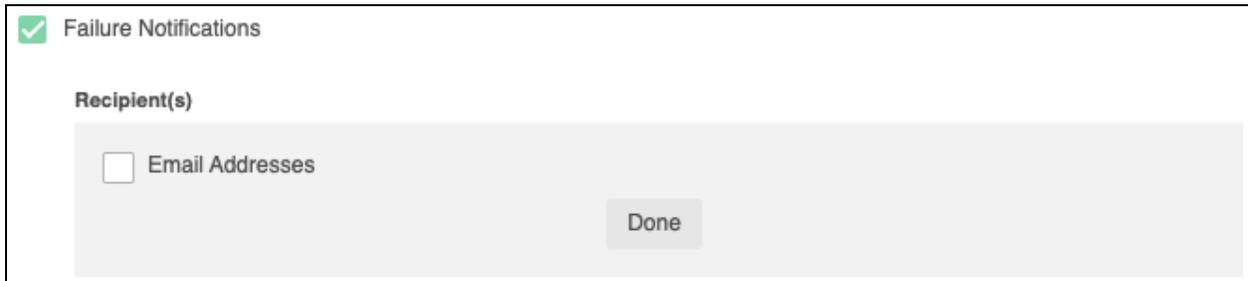
- **Success Notifications:**
 - Use the Email Recipients section to pick the desired recipients of the notification.
 - **New Owner** - This option will send the notification to the new owner of the record.
 - **Previous Owner** - This option will send the notification to the previous owner of the record.
 - **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).



The screenshot shows a configuration window titled "Success Notifications" with a green checkmark icon. Below the title is a section labeled "Recipient(s)" containing four unchecked checkboxes: "New Owner", "Previous Owner", "Additional Recipients" (with a question mark icon), and "Email Addresses". A "Done" button is located at the bottom right of the configuration area.

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 section is titled 'Recipient(s)'. Underneath, there is a checkbox labeled 'Email Addresses'. To the right of the checkbox is a grey button labeled 'Done'.

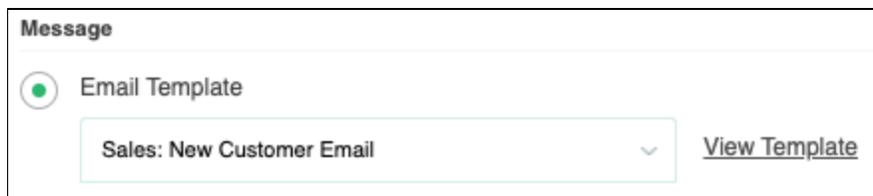
Message

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

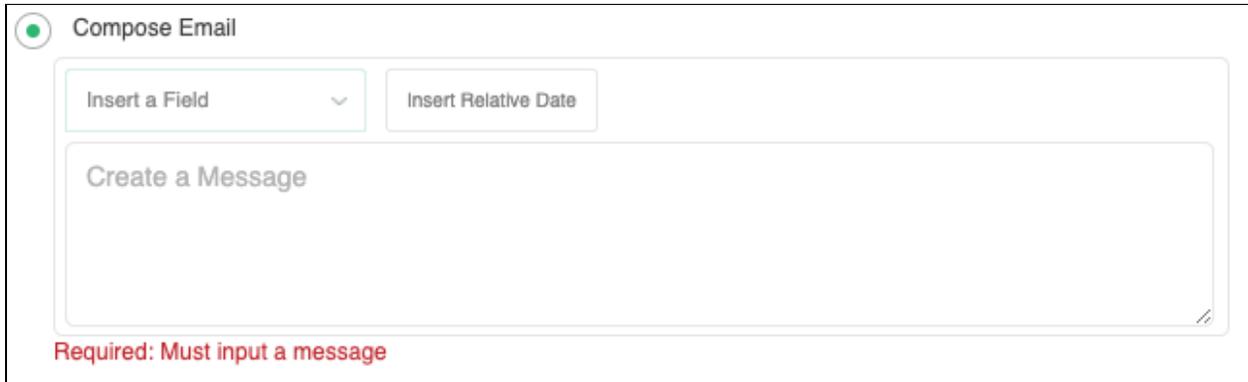
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



The screenshot shows the 'Message' configuration section. At the top, the word 'Message' is displayed. Below it, there is a radio button selected next to the text 'Email Template'. Underneath this, there is a dropdown menu with the text 'Sales: New Customer Email' and a downward arrow. To the right of the dropdown menu is a link labeled 'View Template'.

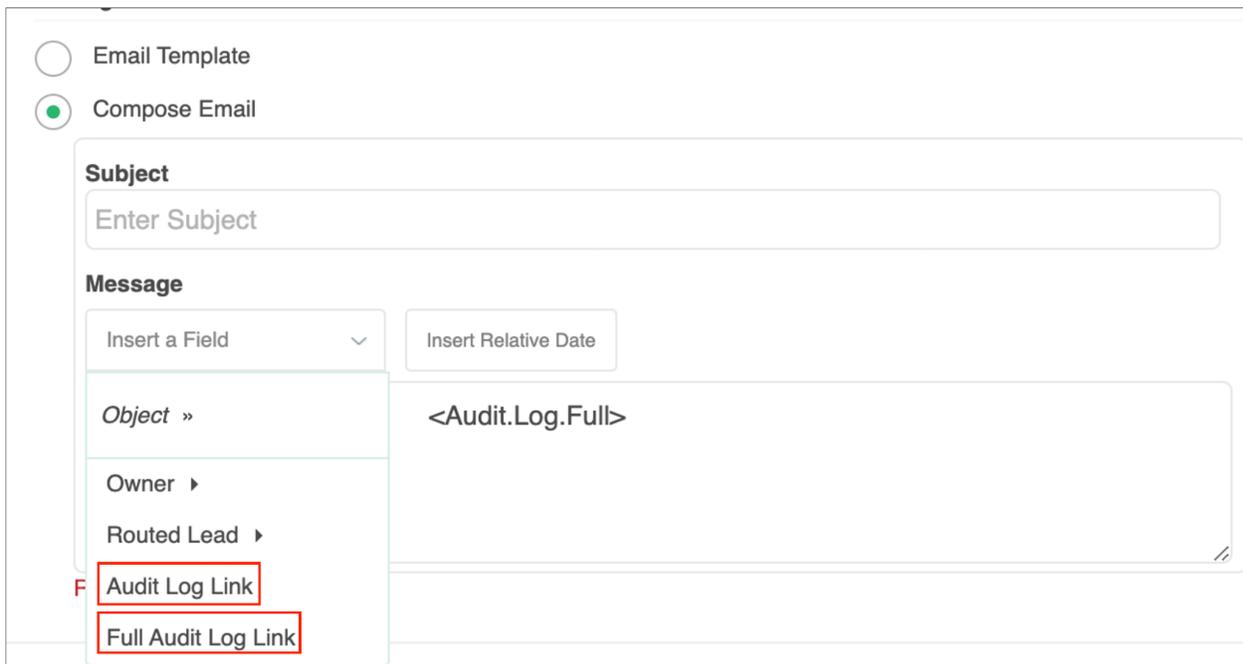
Compose Email

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.



The screenshot shows the 'Compose Email' form. At the top left, there is a radio button selected next to the text 'Compose Email'. Below this, there are two buttons: 'Insert a Field' with a dropdown arrow and 'Insert Relative Date'. A large text area below these buttons contains the placeholder text 'Create a Message'. At the bottom of the form, 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.



The screenshot shows the 'Compose Email' form with the 'Insert a Field' picklist open. At the top, there are two radio buttons: 'Email Template' (unselected) and 'Compose Email' (selected). Below the radio buttons is a 'Subject' field with the placeholder text 'Enter Subject'. Underneath is the 'Message' section, which contains the 'Insert a Field' picklist and the 'Insert Relative Date' button. The picklist is open, showing a list of fields: 'Object »', 'Owner ►', 'Routed Lead ►', 'Audit Log Link', and 'Full Audit Log Link'. The 'Audit Log Link' and 'Full Audit Log Link' options are highlighted with red boxes. The text '<Audit.Log.Full>' is visible in the message area.

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.

Insert - Relative Date

Specify a relative date to insert in the field.

Today (Now)

Day(s) Today

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.

Insert - Relative Date

Specify a relative date to insert in the field.

Today (Now)

 Day(s) Today

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 ▾ |
| Queue Lead Owner | Queue Owner | END OF FLOW ▾ |
| Next Node | Next Node | END OF FLOW ▾ |

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>