

LeanData Routing

Update Account Node Guide

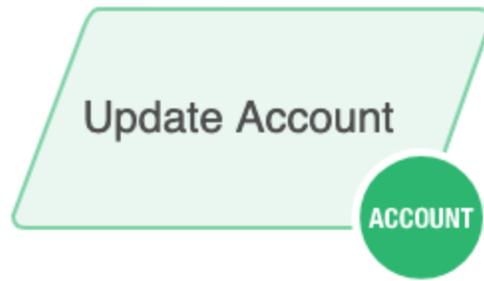




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Overview

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



Example: *Gianna is the LeanData administrator for Lighthouse Development. One of the requirements for the Account Router flow is to be able to report on Accounts after they are routed. Gianna adds a custom field to the Accounts called Routed Status. She then adds an Update Account Node to fill in the field with the value Routed at the end of the Router flow.*

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Update Account Fields
- Email Notifications
- Advanced Settings

Action: Update Account

Node Name

Description >

Update Account Fields
Specify account fields and values to update. (?)

Field	Value	
<input type="text" value="Account Rating"/>	<input type="text" value="Hot"/>	<input type="button" value="Insert"/> <input type="button" value="−"/>

Add field

Email Notifications (?)

Success Notifications

Failure Notifications

Advanced Settings >

Node Name

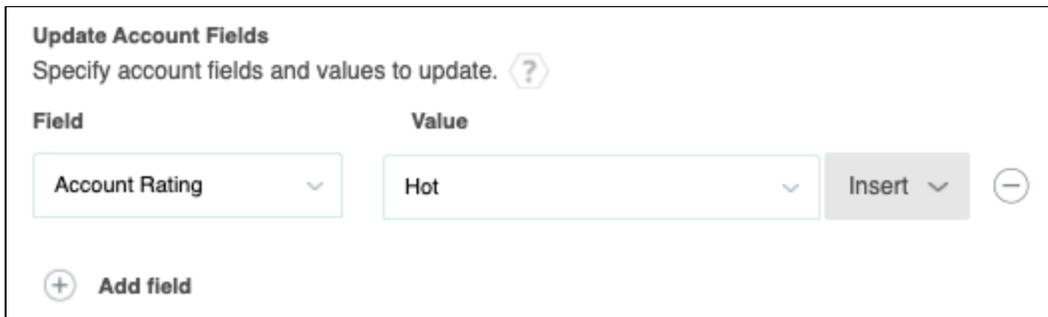
By default, the Node Name is set to Update Account. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the Update. This will help others understand the purpose of the node. For our example, we might call this node, Update Account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

Update Account Fields

The Update Account Fields section gives you the ability to update 1 or more fields on the routed 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.



Update Account Fields
Specify account fields and values to update. (?)

Field	Value
Account Rating	Hot

+ Add field

Insert

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



Customer Priority

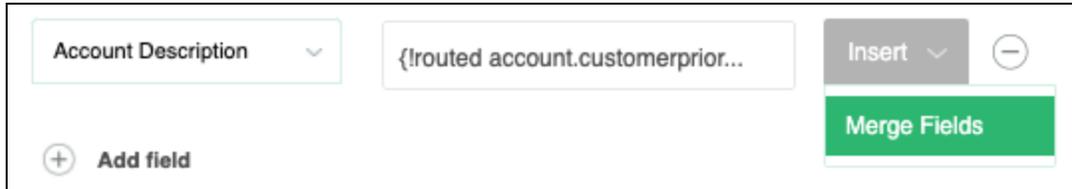
<No Value >

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.

Merge Fields

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



A screenshot of the Merge Fields interface. On the left, there is a dropdown menu with 'Account Description' selected. In the center, a text input field contains the merge field code '{routed account.customerprior...'. On the right, there is a grey 'Insert' button with a dropdown arrow and a minus sign, and a green 'Merge Fields' button. At the bottom left, there is a plus sign and the text 'Add field'.

Insert - Merge Fields

Select a field from the dropdown below.

Insert Field

Search

Object »

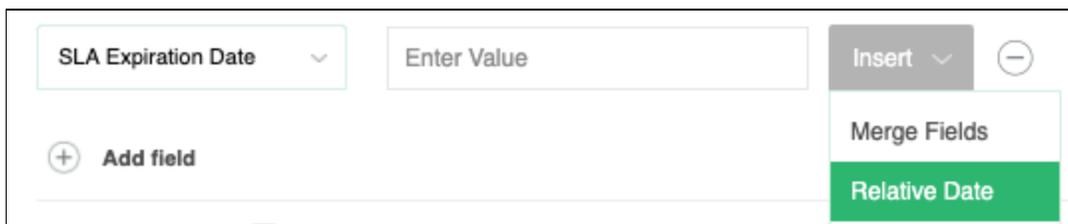
Routed Account ▶

Full Audit Log Link

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.

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.



A screenshot of the Relative Date Stamp interface. On the left, there is a dropdown menu with 'SLA Expiration Date' selected. In the center, a text input field contains 'Enter Value'. On the right, there is a grey 'Insert' button with a dropdown arrow and a minus sign, and a green 'Relative Date' button. At the bottom left, there is a plus sign and the text 'Add field'.

In the pop-up window you can select to use Today's date (Routed Date) or a date XX number of days before/after the date.

Insert - Relative Date

Specify a relative date to insert in the SLA Expiration Date field.

Today

Day(s) Today

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

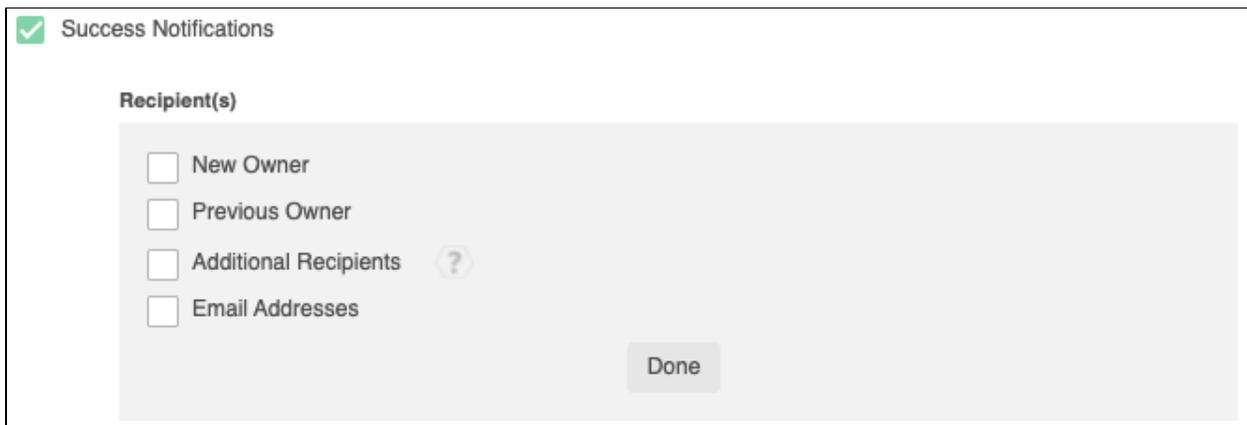
Please Note: The only difference between the Success Notification and the Failure Notification is what triggers the message. If you wish to use both, you will need to configure both types of messages to send.

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.

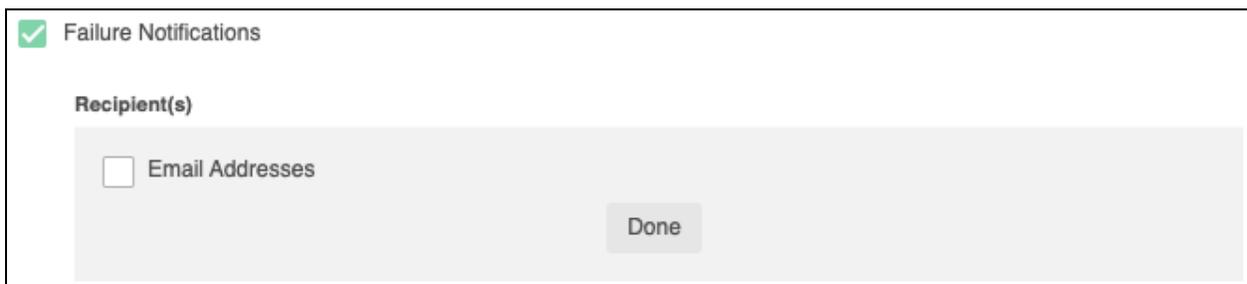
- **New Owner** - This option will send the notification to the new owner of the record.
- **Previous Owner** - This option will send the notification to the previous owner of the record.
- **Email Addresses** - This option will let you enter additional email addresses separated by a comma.
- **Additional 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 and the text "Success Notifications". Below this, the section "Recipient(s)" is highlighted in a light gray box. Inside this box, there are four unchecked checkboxes: "New Owner", "Previous Owner", "Additional Recipients" (with a question mark icon to its right), and "Email Addresses". At the bottom right of the "Recipient(s)" box, there 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 and the text "Failure Notifications". Below this, the section "Recipient(s)" is highlighted in a light gray box. Inside this box, there is one unchecked checkbox: "Email Addresses". At the bottom right of the "Recipient(s)" box, there is a "Done" button.

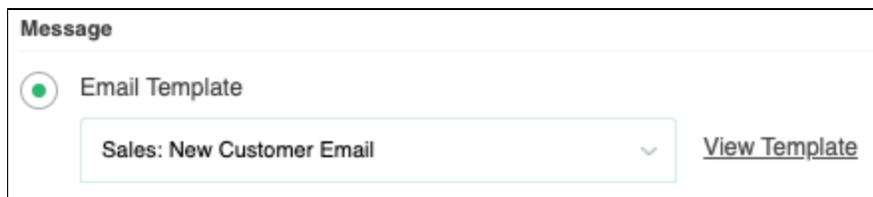
Message

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

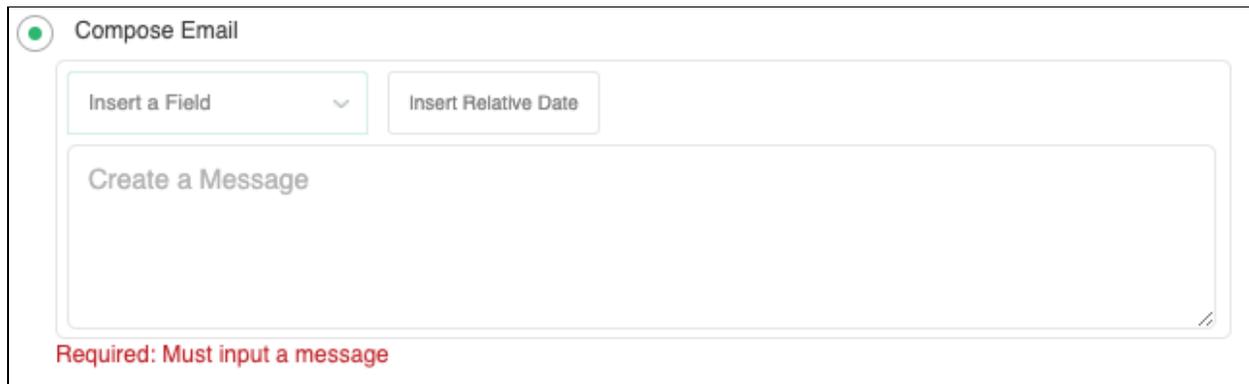
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



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 with a radio button selected. It includes two buttons: 'Insert a Field' and 'Insert Relative Date'. Below these is a large text area with the placeholder text '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

Object » `<Audit.Log.Full>`

Owner ▶

Routed Lead ▶

Audit Log Link

Full Audit Log Link

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 (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.

- **Next Node:** This option allows the record to be directed to another node in the Router Flow after the routed record has been updated.

Summary

The Update Account Node gives you a powerful tool for updating fields on a Routed Account 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 Account 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 Contact Routing Guide: <https://leandatahelp.zendesk.com/hc/en-us/articles/360018933094-Routing-Account-Router-Guide>