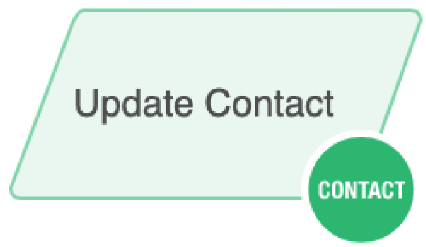
LeanData Routing

Update Contact Node Guide

Overview

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

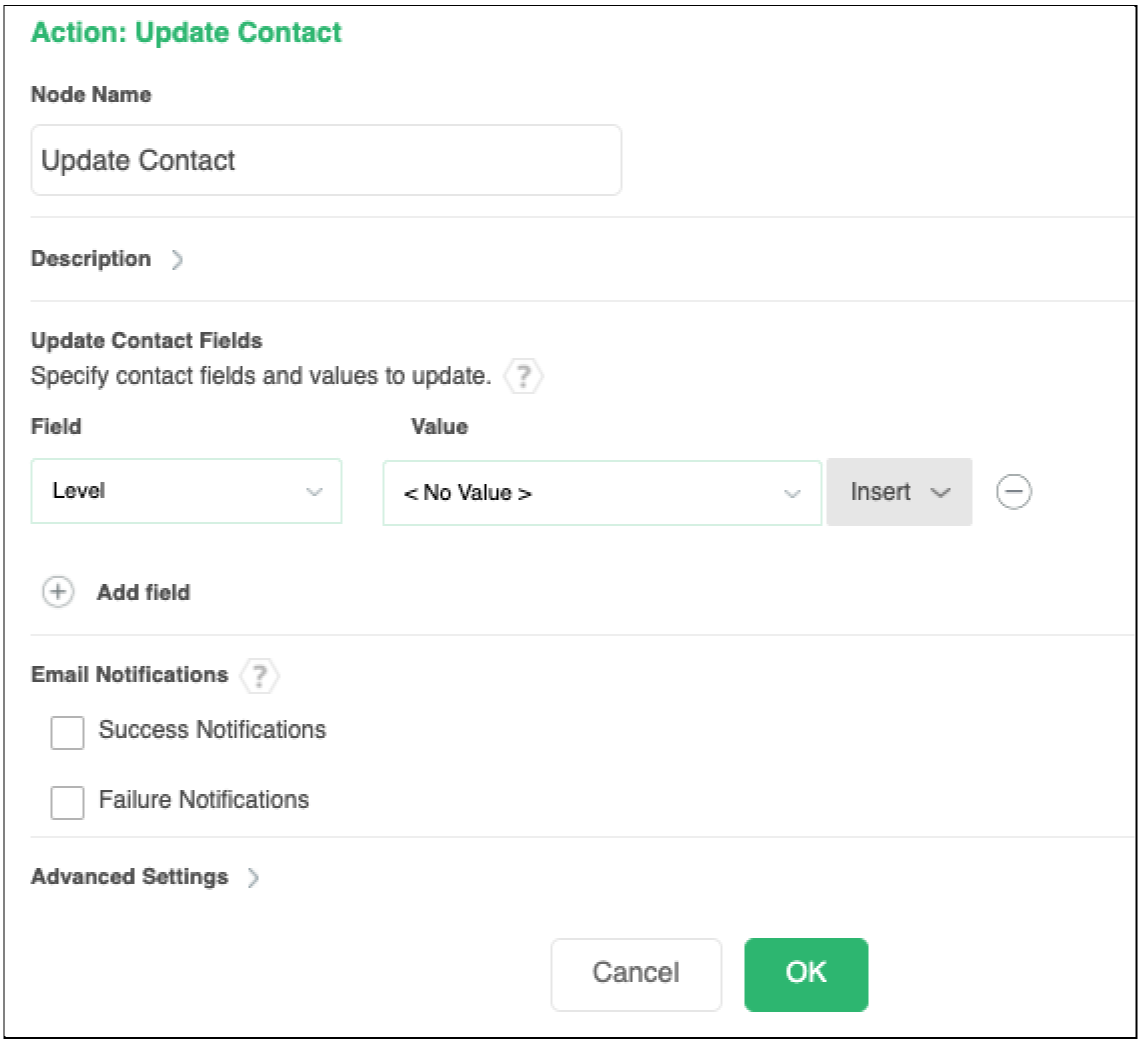


Example: *Frank is the LeanData administrator for Lighthouse Development. One of the requirements for the Contact Router flow is to be able to report on Contacts after they are routed. Frank adds a custom field to the Contacts called Routed Status. He then adds an Update Contact Node to fill in the field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

Customization

You have a number of options to configure the node.

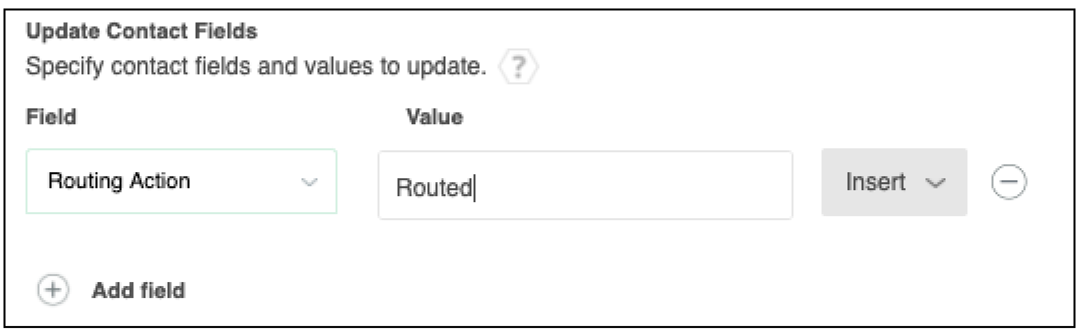
- Node Name
- Description
- Update Contact Fields
- Email Notifications
- Advanced Settings



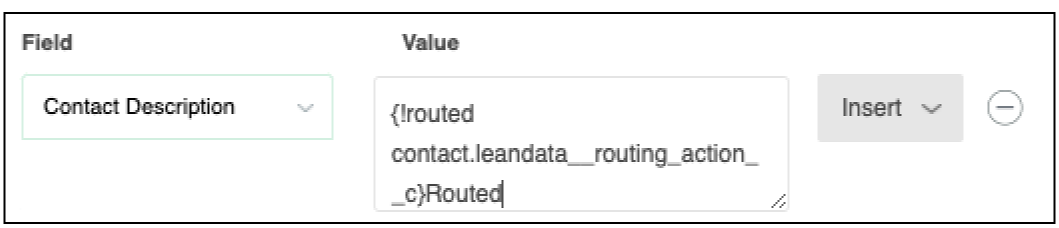
Node Name
By default, the Node Name is set to Update Contact. You can change this label to anything you need. We strongly recommend giving this node a meaningful name such as the subject of the Update. This will help others understand the purpose of the node. For our example, we might call this node,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

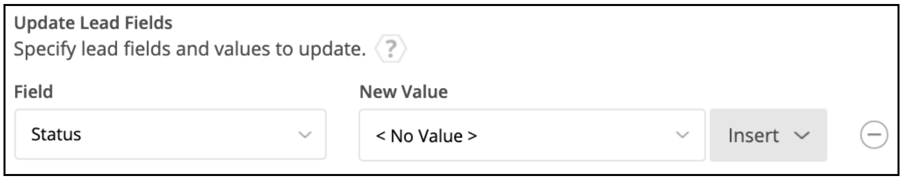
Update Contact Fields
The Update Contact Fields section gives you the ability to update 1 or more fields on the Contact record. There is one field in the section by default, but you can add as many fields as you need to update. For each field, you will have a Field drop-down to select the field to update 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.



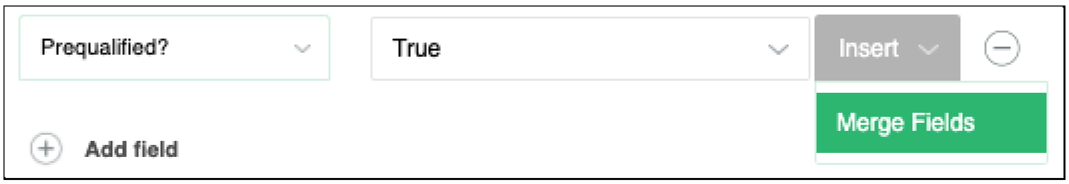
Use the **+** next to Add Field to add additional fields to update.



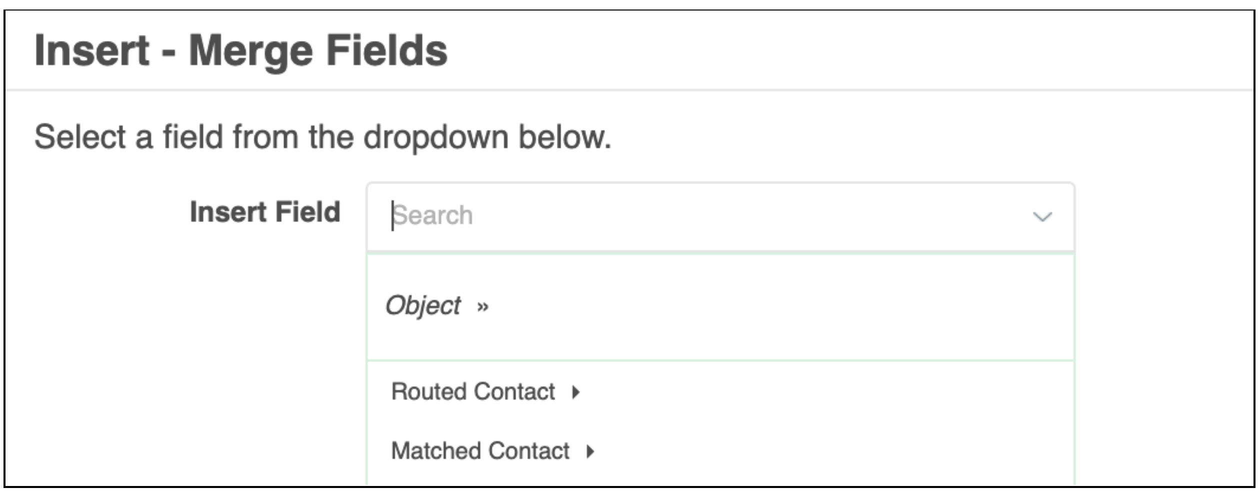
For picklist values, if you would like to clear out the value, you can select the <No Value> option at the top of the picklist.



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



You can insert a field from a matched object or the routed record itself.

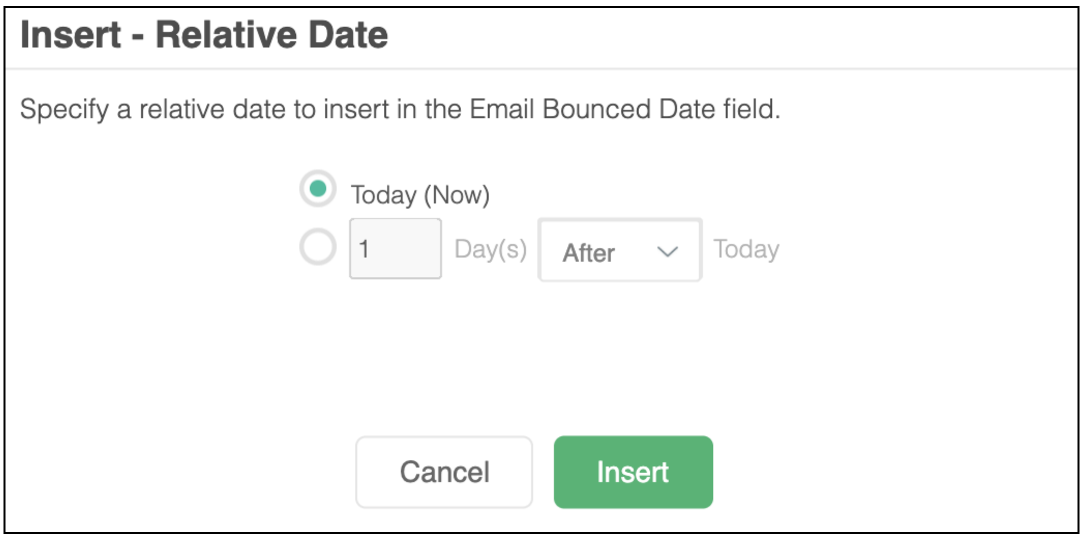


You can use a merge field by itself or in combination with a static value. To use a Merge Field with a static value, enter the static value and then insert the merge field. Select Insert→Merge Fields. From the pop-up select the field to insert from a related lead.

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.

In the pop-up window you can select to use

- **Today's Date (Date of Routing)**
- **XX** number of days after/before 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.

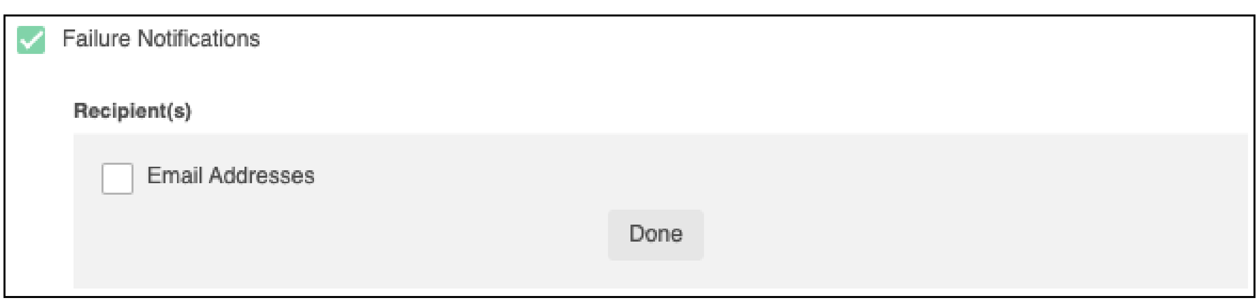
Email Recipients

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).

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.

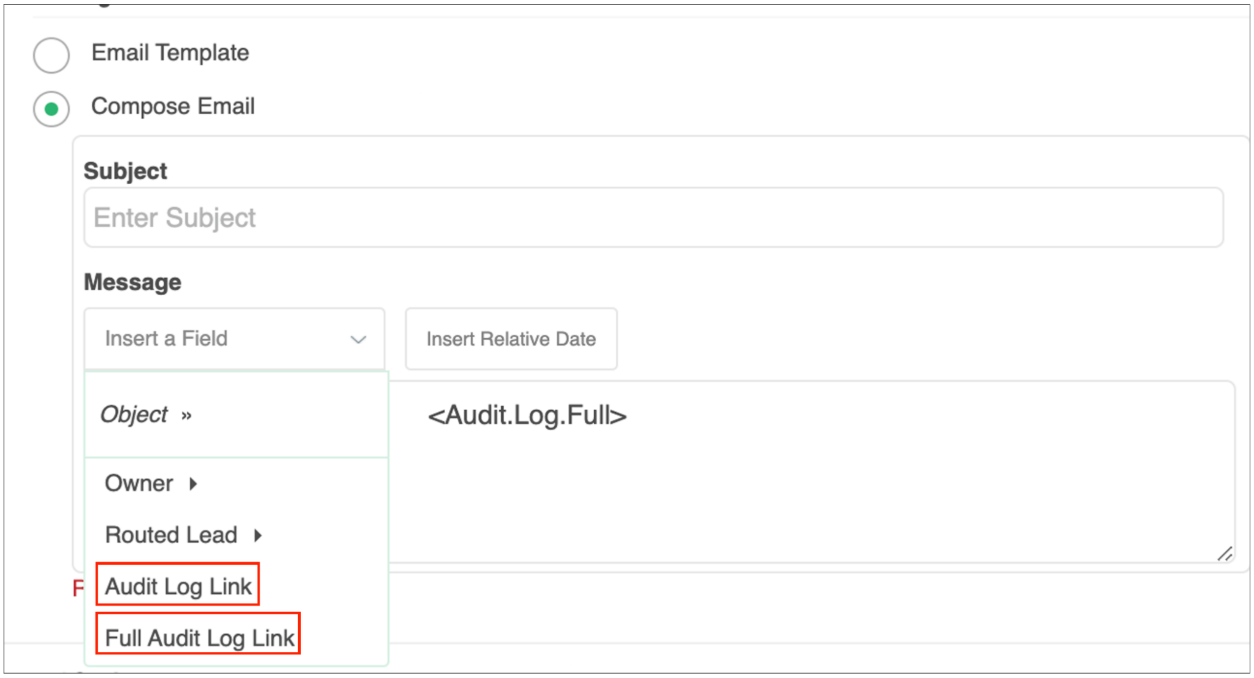
Email Template

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.

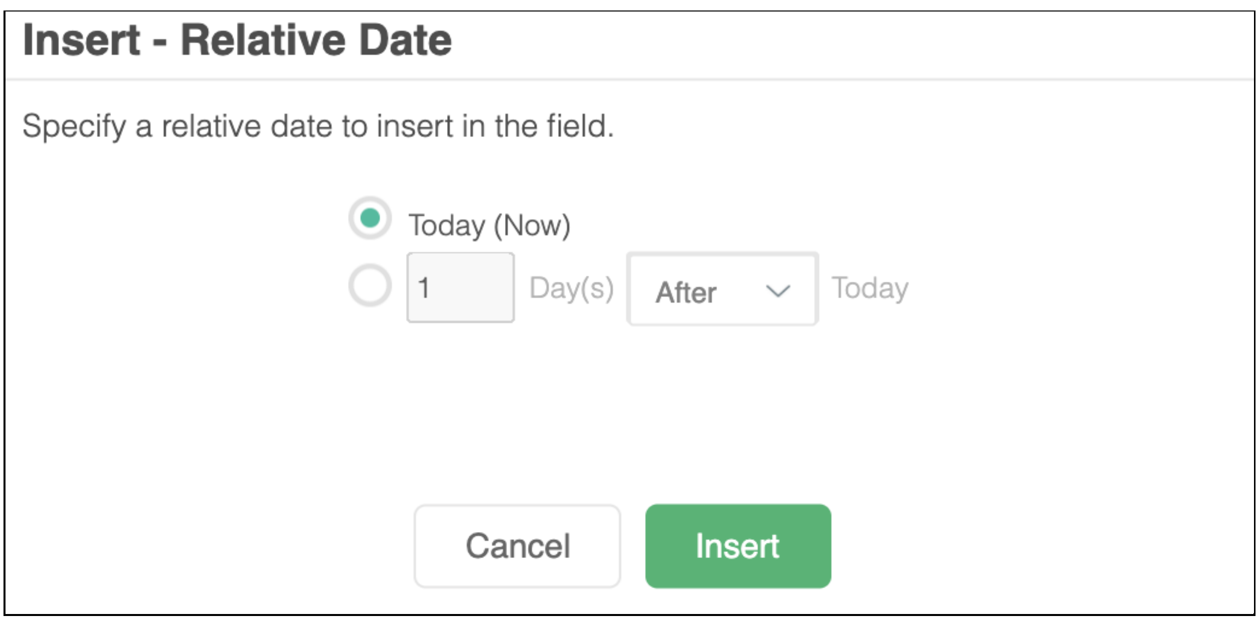
Compose Email

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 after/before 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.

- **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 Contact Node gives you a powerful tool for updating fields on a Routed Contact 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 Contact 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/360018921854-Routing-Contact-Router-Guide