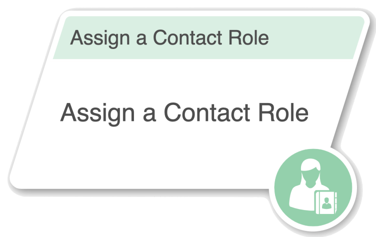
LeanData Routing

Assign a Contact Role
Node Guide

Overview

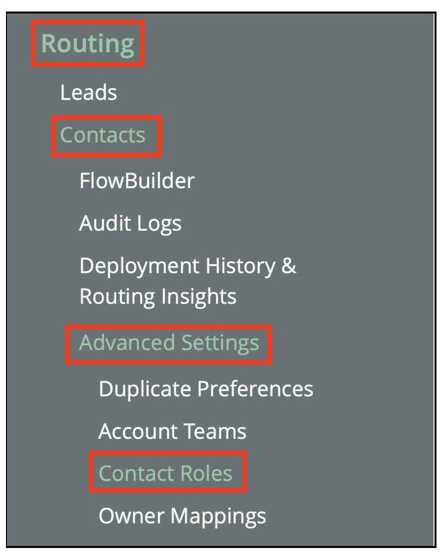
The Assign a Contact Role Node gives you the ability to give a Contact a specific Contact Role using your FlowBuilder graph in either Contact Router or Opportunity Router. This will also allow you to replace existing Contact Roles or mark certain Contact Roles as Primary on the Opportunity.



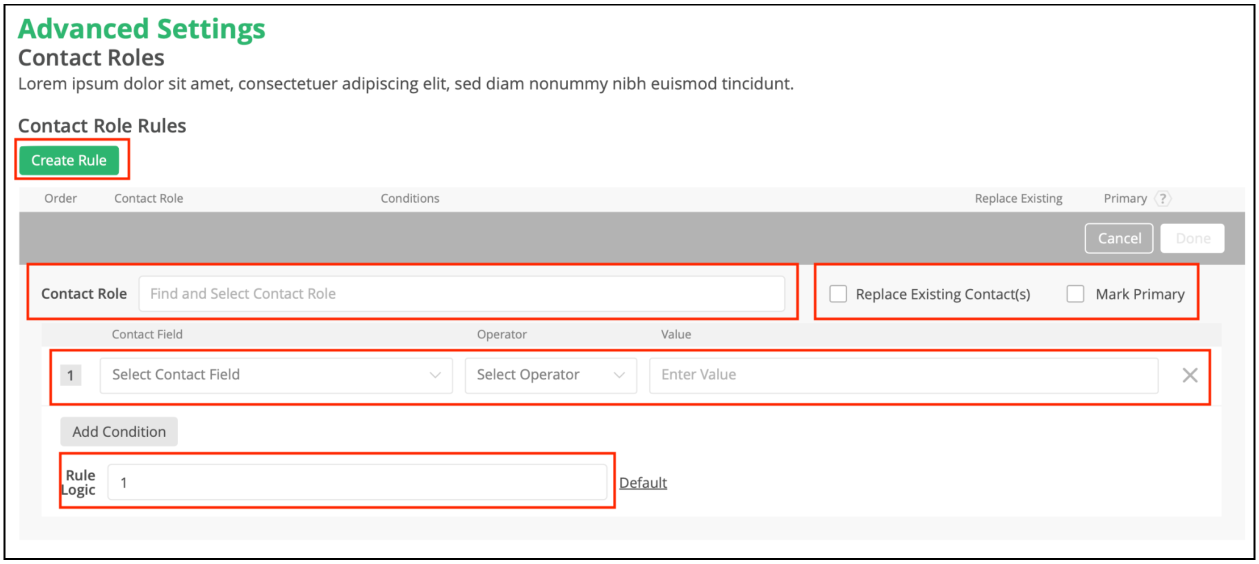
Example: *James is the LeanData administrator for OpenLane Software. After assigning Contacts to the appropriate Owner, some higher priority Contacts should also be given a Contact Role on the open Opportunity. This will help reps understand who are the primary decision-makers and stakeholders for that Opportunity. In Contact Router, after an Opportunity Match node, James uses an Assign a Contact Role Node to ensure that key Contacts are identified on the Opportunity.*

Configuring Contact Role Rules

In order to assign Contact Roles in FlowBuilder, you will need to first set up Contact Role Rules for LeanData to follow. To access this page, navigate to the **LeanData Dashboard** → **Routing** → **Contacts** (or **Opportunities**) → **Advanced Settings** → **Contact Roles**.



Once on the Contact Roles page, click **Create Rule**, then Select the Contact Role that you would like to define rules for. You will later be able to create rules for other Contact Roles.



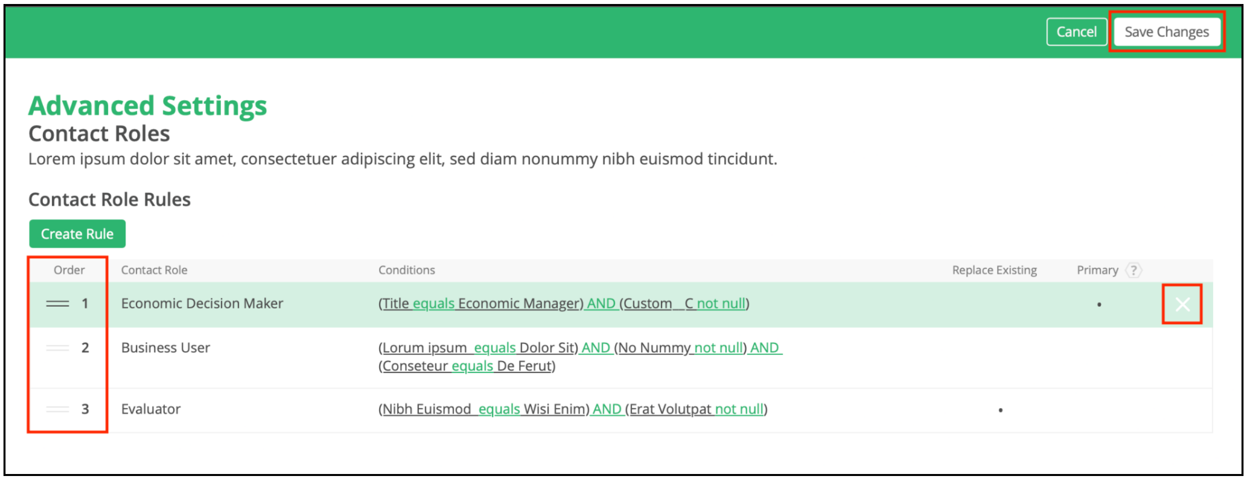
Replace Existing Contacts
If you would like to replace existing Contacts with that Role on an Opportunity, toggle this option on.

Mark Primary
If you would like to mark this Contact Role as the Primary Contact Role on an Opportunity, toggle this option on.

After selecting your options, use the dropdowns to define which Contacts should be given this Contact Role. You can add multiple conditions and use the Rule Logic to combine them with AND and OR statements.

Click the **Done** button when you are finished.

You will be taken back to the main Contact Roles page where you can create rules for your other Contact Roles.



LeanData will evaluate these rules in order from top to bottom, and assign a Contact Role based on the first rule that is satisfied. If you would like to set a Default Role in the case that none of the specified Contact Role rules are satisfied, you can set that at the bottom, otherwise no Contact Role will be assigned.

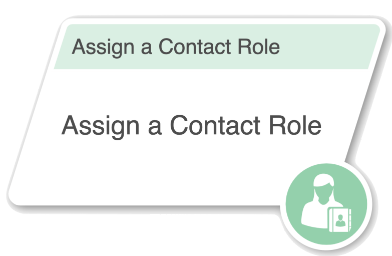
To reorder these rules, you may use the drag handles to the left of each rule.

To delete a rule, hover over the rule you would like to delete and click the **X** icon on the right.

Once you are finished configuring the rules, please remember to click the **Save Changes** button in the upper right.

Configuring a Assign a Contact Role Node

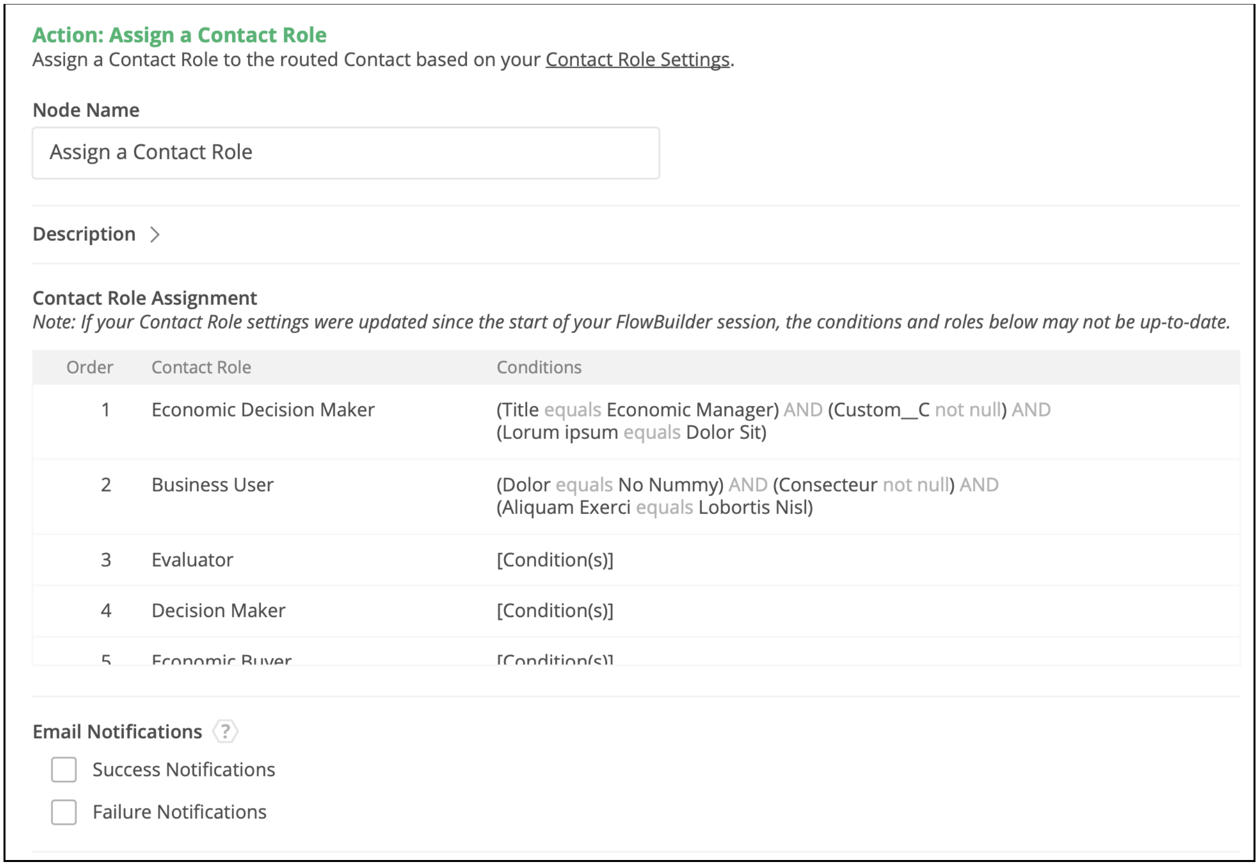
Once you have created your rules, you can now reference these rules in an Assign a Contact Role Node in FlowBuilder.



In order to use an Assign a Contact Role Node, you will need to have identified a Matched Opportunity via an Opportunity Match Node previously in the graph.

Customization

You have a number of options to configure the node.



Node Name

By default, the Node Name is set to Assign a Contact Role. 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.

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 graph, the description will help them to understand the goal of the customizations.

Contact Role Assignment

This section will display all of your configured Contact Role Rules. If you have made changes to the Contact Role Rules recently, you will need to reload the page. Please ensure you save any desired changes before reloading the page.

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 record or matched record (if there is one previously matched in the graph).

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.

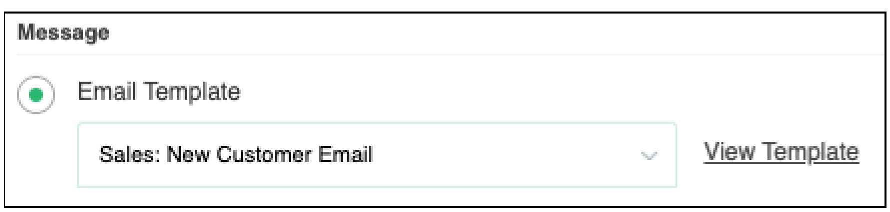
Message

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.

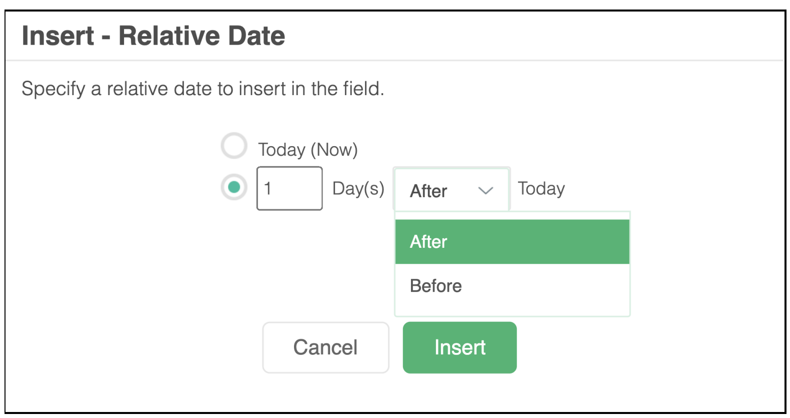


Compose Email

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.

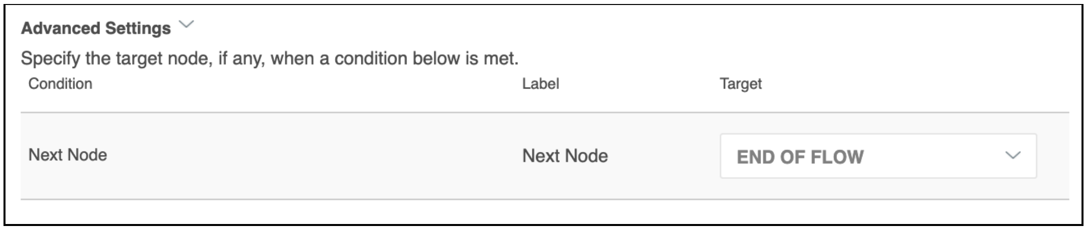
You can insert fields from the routed record or any record related with the matched record. In addition to these fields, you can also insert a link to the audit log for this specific routing action, or to the audit log for every action performed on this record in LeanData. When selecting your field to 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 after the date the record was actioned.



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 proceed to another node in the FlowBuilder graph after the Contact Role has been Assigned. 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.



Summary

The Assign a Contact Role Node will allow you to extend the capabilities of Router beyond just ownership assignment, all from your FlowBuilder graph. This will allow you to replace what others may have been manually doing or handled in other processes.

For additional questions on the Assign a Contact Role node, please contact LeanData Support.