LeanData Routing

Convert Lead Node Guide

Overview

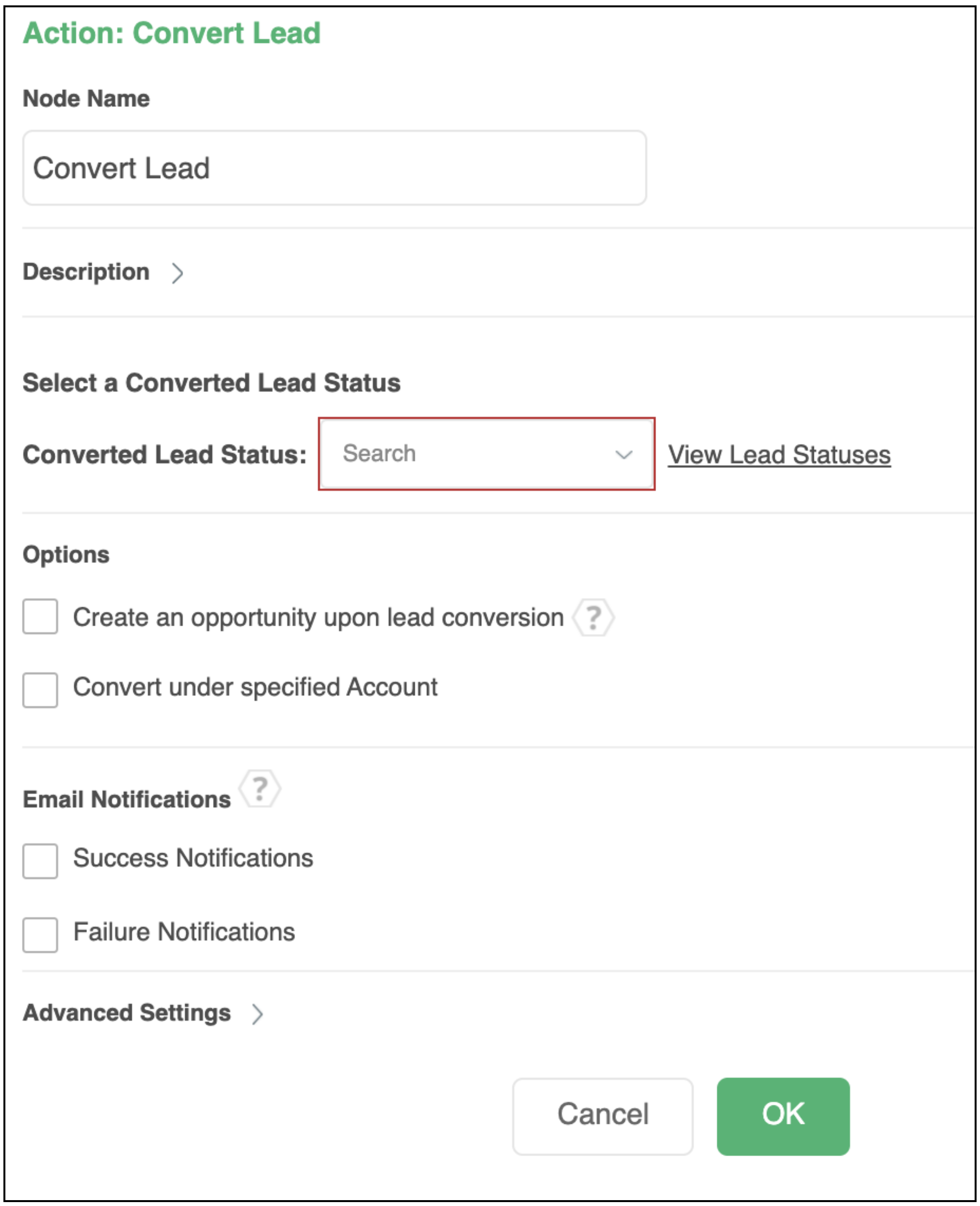
The Convert Lead Node is designed to convert a Lead into a Contact record under a Matched Account. You can convert the Lead after you have routed it to a Lead owner as needed. The node includes options to create an Opportunity for the converted Lead, set a status on the converted Lead, and send out email notifications.

Example: *Bridgette is the LeanData admin for Lighthouse Development. She is using Lead Router to automate their Lead management. When a qualified Lead is routed through their Lead Flow and it matches to an existing Account, Bridgette can add a Convert Lead Node to automatically convert the Lead into a Contact under the matched Account.*

Customization

You have a number of options to configure the node.

- Node Name
- Description
- Options
- Email Notifications
- Advanced Settings



Node Name
By default, the Node Name is set to Convert Lead. 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.

Options
The Options section has 3 options for how the node should work:

- Create an Opportunity Upon Lead Conversion
- Convert Under Specified Account
- Convert Lead Status

Create an Opportunity Upon Lead Conversion
This option will configure the node to create an Opportunity for the Contact when it converts the Lead into a Contact.

Convert Under Specified Account
This option configures the node to convert the Lead to a Contact under a specific Account instead of the previously matched Account. You need to enter the Salesforce ID of the Account in the provided text box.

Convert Lead Status
The option configures the Status on the converted Lead. You must pick a converted status for your Lead before it can be converted. This is a Salesforce requirement. Closed - Converted is the most common option but if you have other converted statuses, you can choose one.

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.

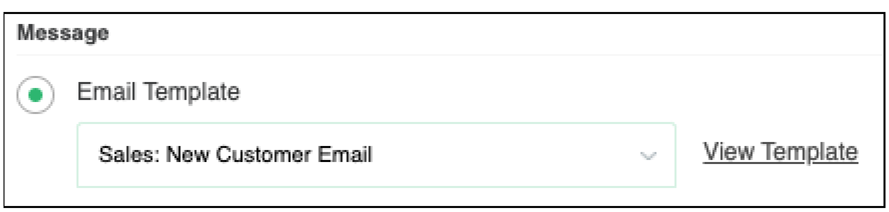
Message

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

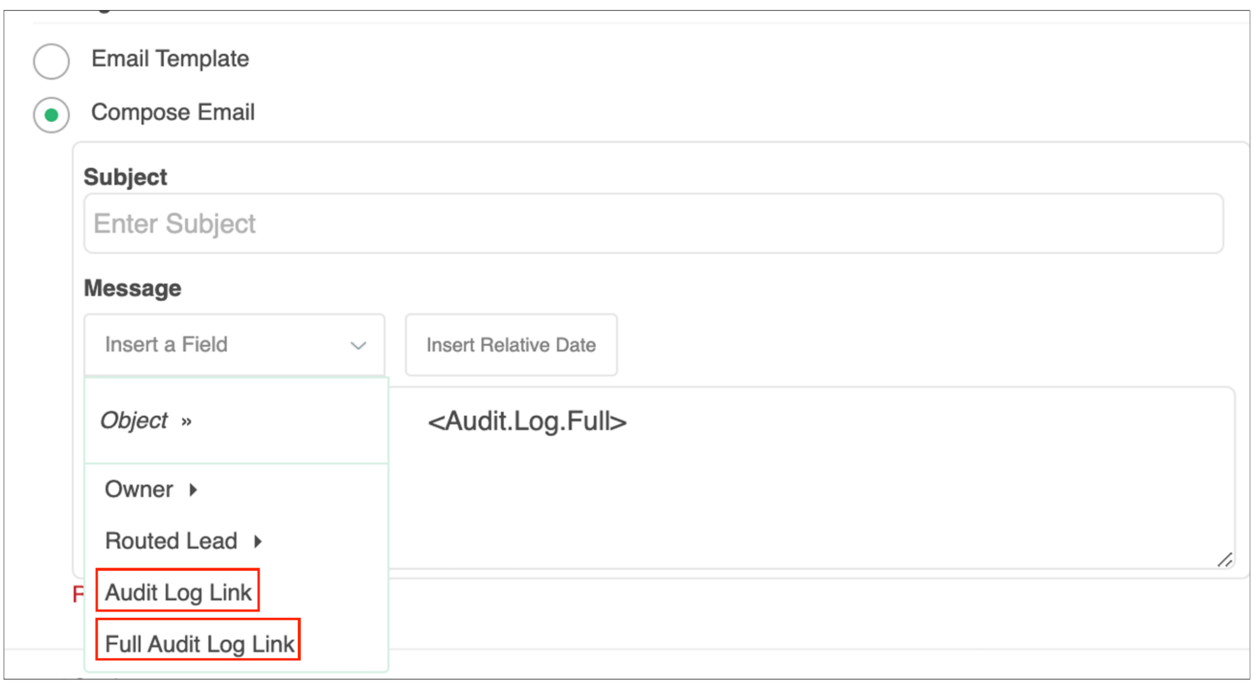
When you select the Email Template option, you will be asked to select the desired Salesforce Template. You cannot edit the message in LeanData. You can use the View Template link to view the selected template.



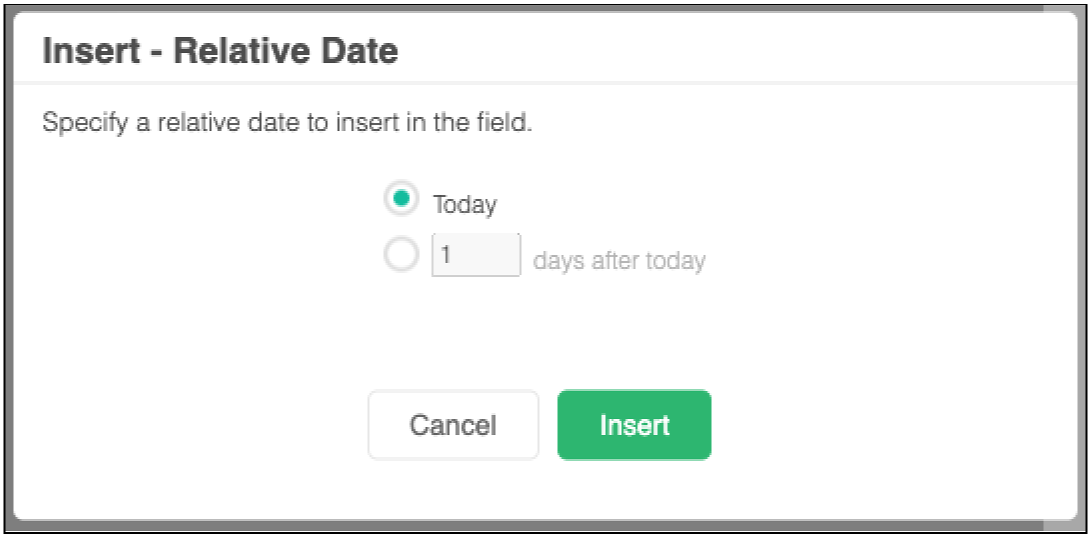
Compose Email

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.



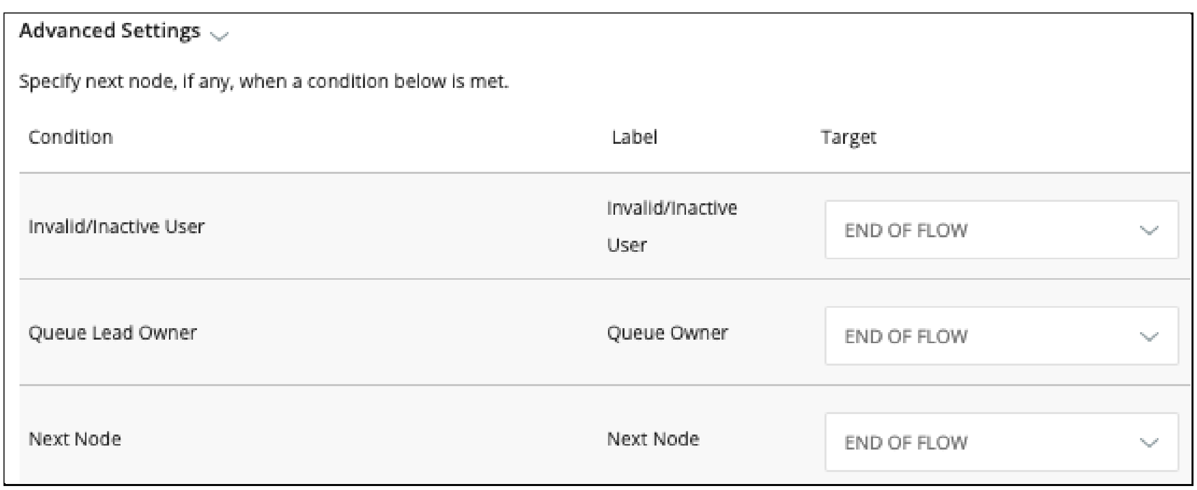
Use the Insert Relative Date to add the date the record was routed or a set number of days after the date the record was routed.



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 convert a Queue-owned Lead. Native Salesforce functionality does not allow Contacts to be owned by Queues, only Users.
- **Next Node:** This option allows the record to be directed to another node in the Router Flow, such as sending a notification. You can also set this node to End of Flow. This will stop all actions at this node instead of sending it to another node.



Things to Know & Best Practices

- After a Lead converts, you will no longer be able to take actions on the Lead. You will have to use LeanData's Contact router module to take action on the resulting Contact.
- If you use <Current Lead Status> for your converted Lead status, make sure all available statuses are marked as eligible converted statuses in SFDC.
- Using the Next Node edge, after the conversion of the Lead, is limited to the Send Notification, Create Account, Create Opportunity, and Create Task nodes.

Summary

The Convert Lead Node is a powerful automation tool for converting your Leads into Contacts after they have previously matched to an Account.

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