

# 12 Automated Alerts

## You Didn't Know You Could Do in LeanData

LeanData alerts can be automated and delivered into [Slack](#), [Microsoft Teams](#), or email. These automated alerts are full of rich context — like details on the triggering event and what steps to take next

### 1. Opportunity Creation Alerts



When a new Opportunity is created, LeanData will assign the appropriate owner based on custom logic and then alert the appropriate owner.

### 2. Stage Change Alerts



LeanData can send notifications or take action on Opportunity stage changes and customize alerts based on any Account, Opportunity, or matched record data.

### 3. Crossbeam Partner Overlap Alerts



LeanData can use the [Crossbeam](#) integration node to identify partner overlap at an Account and alert the appropriate AE.

### 4. Won Opportunity Alert



LeanData can send email and/or instant message alerts whenever an Opportunity has moved to "Closed Won", including a reminder to the AE to handoff to the CS team.

### 5. Start or End of Trial Alert



Do you run a PLC motion? LeanData can send alerts when an Opportunity is starting a trial period or nearing the end of its trial period.

### 6. Deal Stuck in Stage Alert



If an Opportunity has been in one particular stage for over 30 days, LeanData can send an alert to a sales rep to take action.

### 7. Stale Sales Account Alerts



LeanData can call attention to Accounts without activity in a predetermined period, Accounts with no Opportunities, or any other criteria that would make the Account "stale."

### 8. Routing Monitoring Alerts



Admins can receive proactive alerts via instant messages or email if processes were delayed, aborted, or incomplete.

### 9. Missed Service Level Agreement (SLA) Alerts



LeanData can alert your Sales reps of priority leads, and notify the manager or automatically reassign if a lead is not actioned in a timely manner.

### 10. Duplicate Record Alert



LeanData will [find duplicate accounts](#) using our matching algorithm, alert the account owner, and stamp the ID of the duplicate onto the new account.

### 11. Job Change Alerts



The LeanData routing scheduler can automatically create or update new records for new job changes detected by UserGems. LeanData then alerts the appropriate AE or SDR with context.

### 12. Webinar Attendance Alerts



LeanData can automatically update Contact records in Salesforce when a Contact registers for your webinar.

## So Much More Than Matching & Routing

LeanData alerts supply all the information needed to guide your employees' next best steps.