LeanData
Account Teams Guide

Overview

The following guide contains a high level overview of how you can reference a Salesforce Account Team within LeanData's Routing products. LeanData's Account Teams feature allows you to create and manage multiple Account Team Routing Rules to assign records based on the existing Account Team structures you have in place

Definitions

Account Team

An Account Team is a team of users that collaboratively work on an account. This feature is used to grant specific users access to Accounts and their related Contacts, Opportunities, and Cases. It is most useful for companies that operate in a private sharing model that prohibits users from seeing or editing Accounts. For more information on this Native Salesforce feature you can see the below Link.

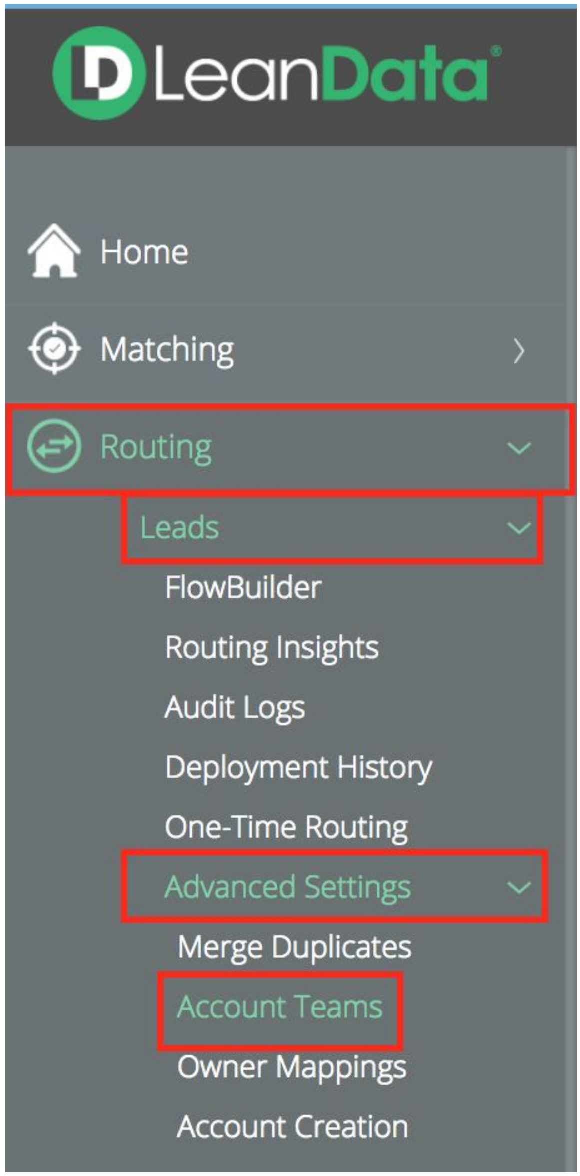
https://help.salesforce.com/articleView?id=customize_accountteams.htm&type=5

Account Team Rule

An Account Team Rule is a LeanData specific feature that allows you to specify a priority order of Account Team members who should receive a record. You can utilize FlowBuilder to direct records to a specific Account Team Rule

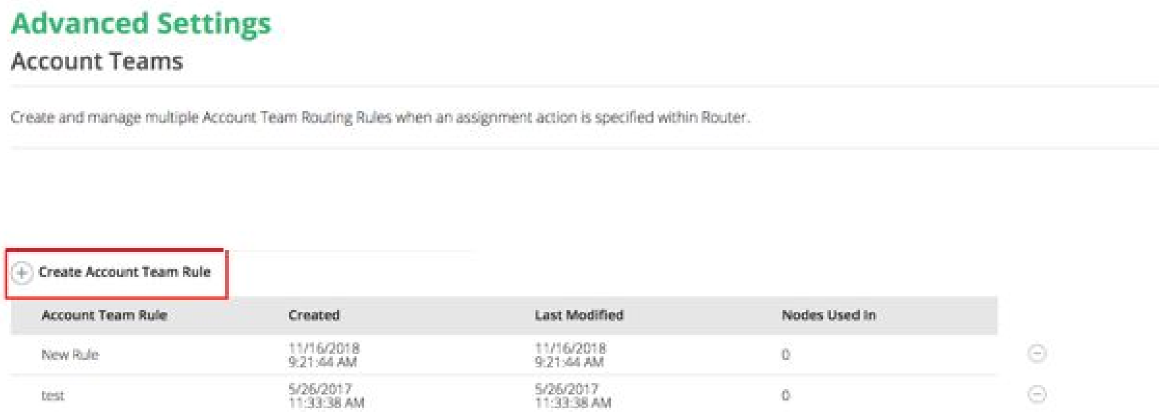
Accessing LeanData Account Team Routing Settings

To access LeanData's Account Team Rules feature, navigate to the LeanData tab, then Routing → Leads (or other object) → Advanced Settings → Account Teams.

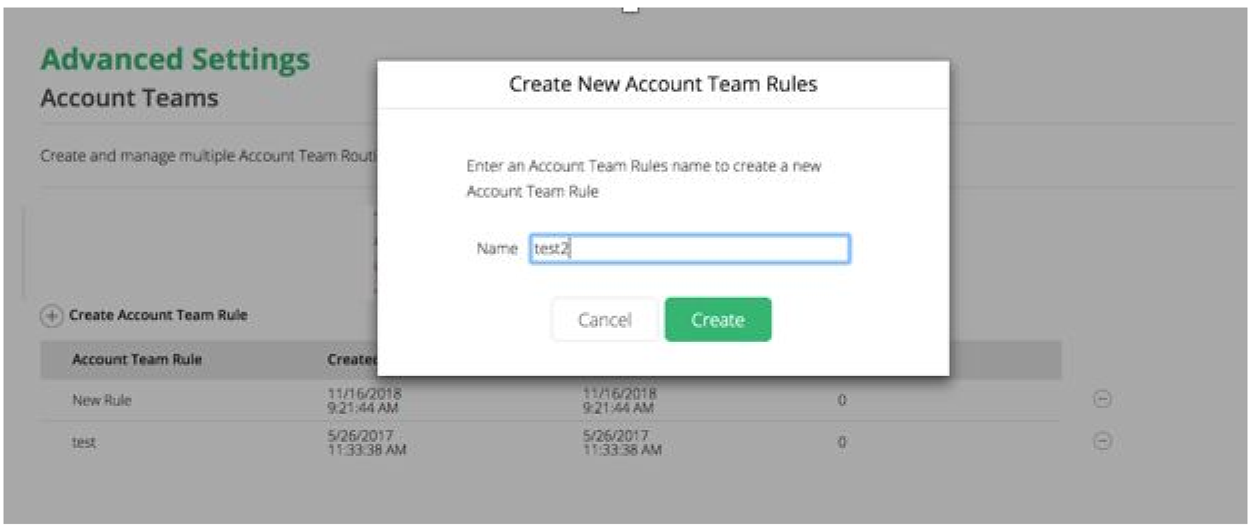


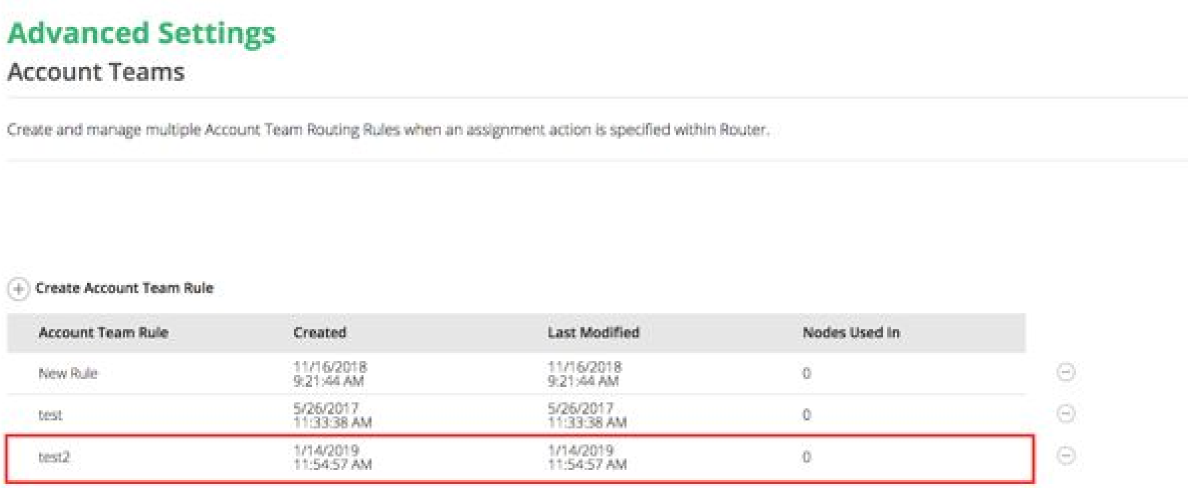
Creating an Account Team Routing Rule

In order to route to Account Team members using FlowBuilder, you will first need to create an Account Team Rule. To create a new Account Team Rule, you can click on the "Create Account Team Rule" button.

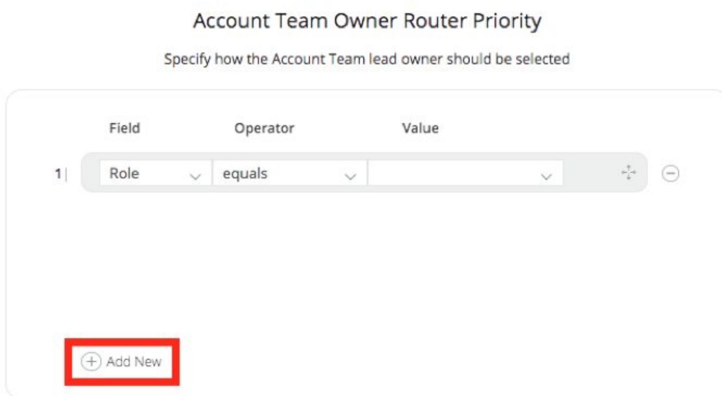


Name your Account Team Rule, and it will then appear in your list of active rules.

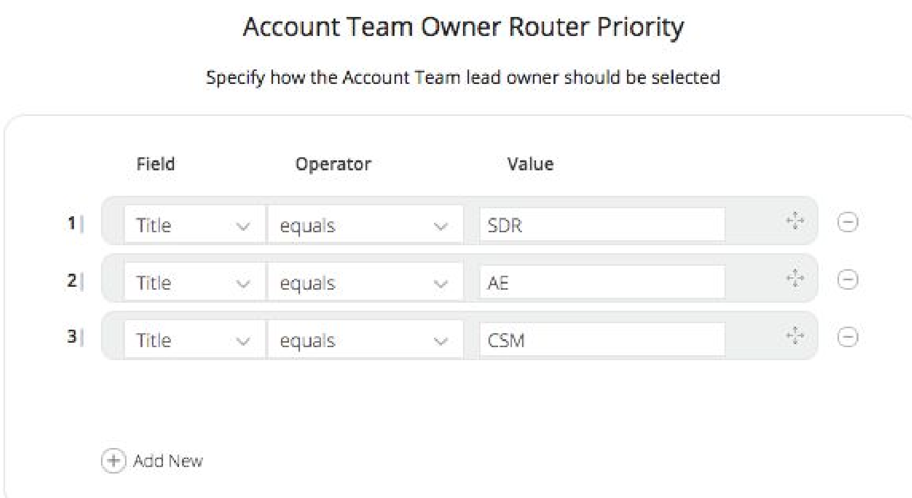




After creating the rule, click on it to be taken to the editing screen. Here you can specify how LeanData should leverage your Account Teams to determine which members should receive a record.. Click the “Add New” button to begin setting up the prioritization.



You can use the Role, Title, or Profile fields to configure the prioritizations and the operator options are different for each field. In the example below, we are prioritizing assigning the record to the Account team user with Title = SDR, if there is no SDR, then assigning to the user with Title = AE, and if there is no AE, then to the User with Title = CSM.



After selecting the Field, Operator, and Value, click “Save” to save your edits to the rule. You can also change the prioritization order by dragging the arrow symbol to the right of the rules and dropping them in the order you would like.

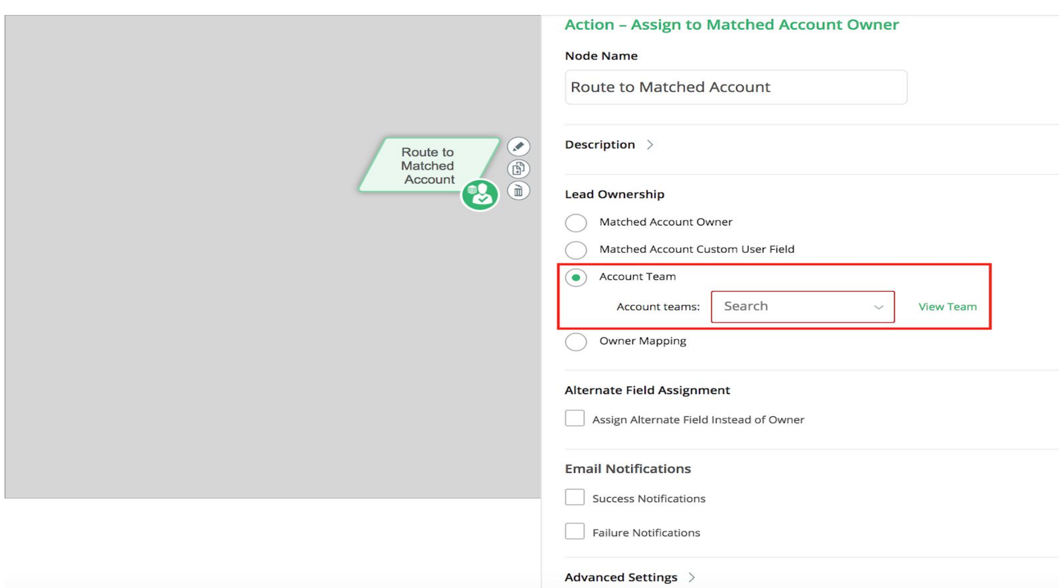
In the case that multiple account team members meet a prioritization condition — for example, you have more than one Account Team member whose Title = SDR — you can set up a tie-breaker rule that would allow us to select the appropriate member.

This will allow LeanData to “break the tie” and choose the appropriate owner.

Incorporating Account Team Routing in FlowBuilder

Once you have created your Account Team Rule, you can reference this rule for routing purposes using a “Route to Matched Account” action node in FlowBuilder.

When editing the node, select the “Account Team” option, then select your desired Account Team Rule from the options presented in the drop down.



When records are assigned using this rule, LeanData will evaluate the related Account Team associated with the Matched Account and route the record to the member specified in the selected Account Team Rule.

Questions? Contact Support@Leandatainc.com