

LeanData Routing

Owner Mappings Guide





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Overview

The following guide will walk through how to set up the Owner Mappings feature in LeanData Router.

LeanData Owner Mappings provide the ability to route records to an owner that is mapped to the Account Owner. This is typically used by organizations where SDRs / BDRs perform the initial lead qualification prior to Account Executive engagement. LeanData Owner Mappings will allow you to assign a Lead that matches an Account owned by an Account Executive to the Account Executive's associated SDR / BDR.

Owner Mapping functionality includes:

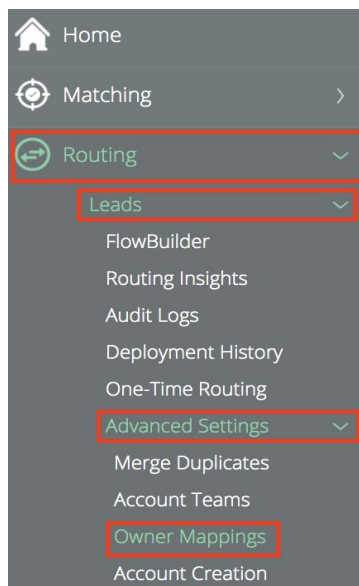
- Full control available within Salesforce
- Assign SDRs / BDRs to leads that match to accounts owned by their respective Account Executive

Managing Owner Mappings

Accessing LeanData Owner Mappings

Perform the following steps to set up your Owner Mappings:

Go to the LeanData Dashboard → Routing → Leads → Advanced Settings → Owner Mappings. (You can also access Owner Mappings the same way for other objects as well).



Adding New Owner Mapping Sets

Click “Add New” to Create a New Owner Mapping Set.

Advanced Settings
Owner Mappings

Map an existing account owner to a new account team owner in LeanData Router for leads routed to matched accounts. This is typically used by organizations with account teams where SDRs / BDRs first qualify leads for account exec owners.

Name: + Add New Delete

Description: Save

Add a new entry by specifying an existing and new owner

Existing Owner: → New Owner: Add

Existing Owner	New Owner	Edit	Delete
Account Exec One	SDR One		
Kevin Test	SDR Four		

Name the Owner Mapping Set and it will then appear in the dropdown menu.

Advanced Settings
Owner Mappings

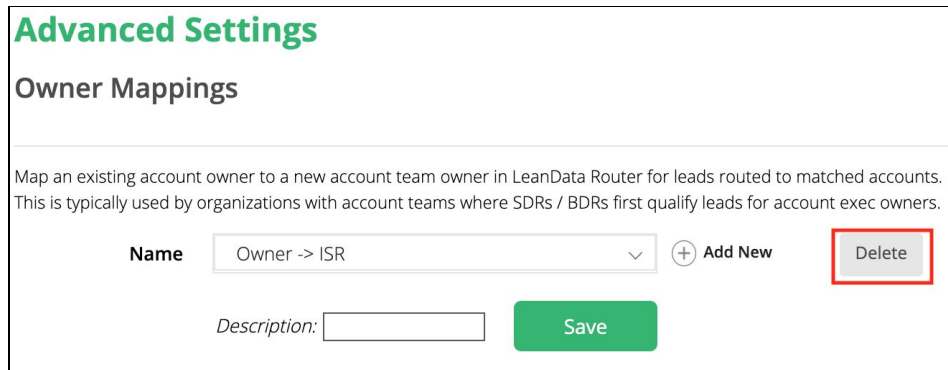
Map an existing account owner to a new account team owner in LeanData Router for leads routed to matched accounts. This is typically used by organizations with account teams where SDRs / BDRs first qualify leads for account exec owners.

Name: + Add New Delete

Description: Save

Deleting Owner Mapping Sets

To delete an Owner Mapping Set, select the Owner Mapping Set you wish to delete from the dropdown, then hit the **Delete** button and confirm you want to delete this Owner Mapping Set.



Advanced Settings

Owner Mappings

Map an existing account owner to a new account team owner in LeanData Router for leads routed to matched accounts. This is typically used by organizations with account teams where SDRs / BDRs first qualify leads for account exec owners.

Name:

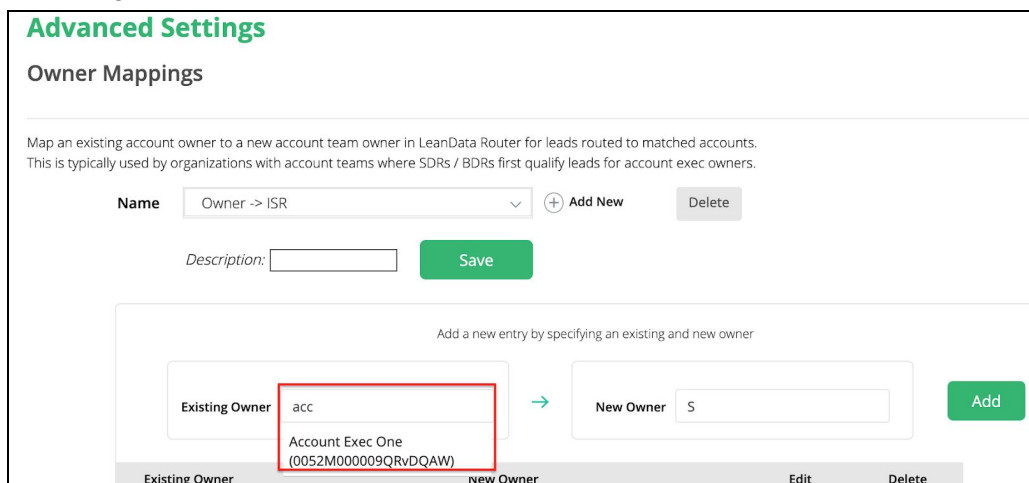
Description:

Adding and Deleting Individual Owner Mappings

Existing Owner: Existing matched account owner (generally an Account Executive)

New Owner: The user you would like to receive the record being routed (usually the SDR / BDR for that Account Executive)

Enter the existing owner in the search bar and select the owner.



Advanced Settings

Owner Mappings

Map an existing account owner to a new account team owner in LeanData Router for leads routed to matched accounts. This is typically used by organizations with account teams where SDRs / BDRs first qualify leads for account exec owners.

Name:

Description:

Add a new entry by specifying an existing and new owner

Existing Owner: → New Owner:

Existing Owner new Owner Edit Delete

Enter the new owner in the search bar and select the owner you want to assign the lead to.

Add a new entry by specifying an existing and new owner

Existing Owner	Account Exec One (0052M0001)	→	New Owner	sdr o SDR One (00541000001Zk7oAAC)	Add
Existing Owner			New Owner	edit	Delete

Once the owners are entered, click the **Add** button to create the New Owner Mapping Assignment.

Click the **Save** Button at the bottom of the page.

Note: You cannot map a specific Existing Owner to multiple New Owners. You can, however, map a particular New Owner to multiple Existing Owners.

To add a Description, simply type in the **Description** box and hit the **Save** button next to the box to save the new description.

Advanced Settings

Owner Mappings

Map an existing account owner to a new account team owner in LeanData Router for leads routed to matched accounts. This is typically used by organizations with account teams where SDRs / BDRs first qualify leads for account exec owners.

Name

Description:

Selecting and Editing Owner Mappings

To edit Owner Mappings, click the edit button to the right of the owners. Also, owner mappings can be deleted and new ones can be added.

Advanced Settings

Owner Mappings

Map an existing account owner to a new account team owner in LeanData Router for leads routed to matched accounts. This is typically used by organizations with account teams where SDRs / BDRs first qualify leads for account exec owners.

Name:

Description:

Add a new entry by specifying an existing and new owner

Existing Owner: → New Owner:

Existing Owner	New Owner	Edit	Delete
<input type="text" value="Kevin Test(00541000000RSHQAA4)"/>	<input type="text" value="SDR Four(00541000001Zk88AAC)"/>	<input type="button" value="✎"/>	<input type="button" value="✖"/>
SDR Four	SDR Three	<input type="button" value="✎"/>	<input type="button" value="✖"/>
SDR Three	SDR One	<input type="button" value="✎"/>	<input type="button" value="✖"/>
Account Exec One	SDR One	<input type="button" value="✎"/>	<input type="button" value="✖"/>


Using the Owner Mapping Setup Wizard

If you have a large number of Owner Mappings to create or update, you can use the Setup Wizard to help create/edit the mappings in bulk. The Setup Wizard allows you to upload a CSV (Comma Separated Value) of the Salesforce IDs of the Existing and New Owners. LeanData can use the CSV file to Update or Overwrite the Owner Mappings.

Click on the Setup Wizard button in the upper right corner of the Owner Mappings page.



Click the Select File button to choose the CSV file to upload.

 **Step 1: Select File**

Select an owner mapping file

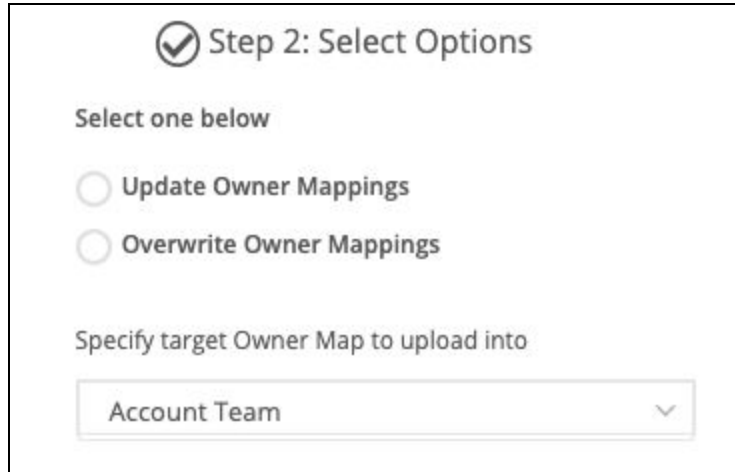
Include header row at the top. Column A contains the existing/source SFDC User ID; Column B contains the target/mapped SFDC User ID ([Sample Template](#))

Filename: OwnerMapping.csv **Select File**

There is a Sample Template you can use to create your CSV. The CSV has 2 columns: Existing Owner ID and New Owner ID. Fill the columns with the Salesforce IDs of the users to be set as the Existing Owner and New Owner. Use 1 row for each mapping.

	A	B	
1	Existing Owner Id	New Owner Id	
2	00536000001iTfw	00536000001ifg8	
3	00536000001qudf	00536000001iTfw	
4	00G36000001JqIU	00536000001ifg8	
5			

After uploading your CSV, you will see the options in Step 2 are now available. Select the desired option: Update Owner Mappings or Overwrite Owner Mappings.



Step 2: Select Options

Select one below

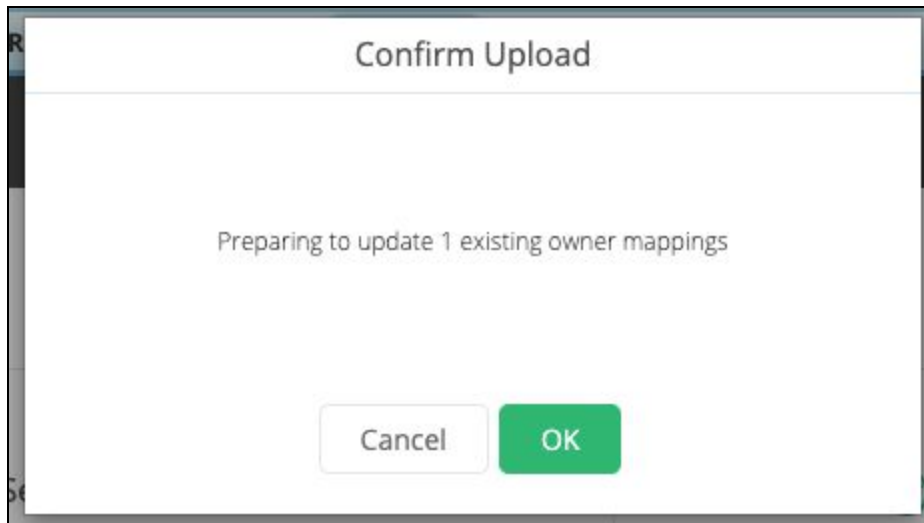
Update Owner Mappings

Overwrite Owner Mappings

Specify target Owner Map to upload into

Account Team

Select the Owner Map to upload to, from the pull-down menu. Click Process to start the upload. You will be asked to confirm your action in a pop-up.



Confirm Upload

Preparing to update 1 existing owner mappings

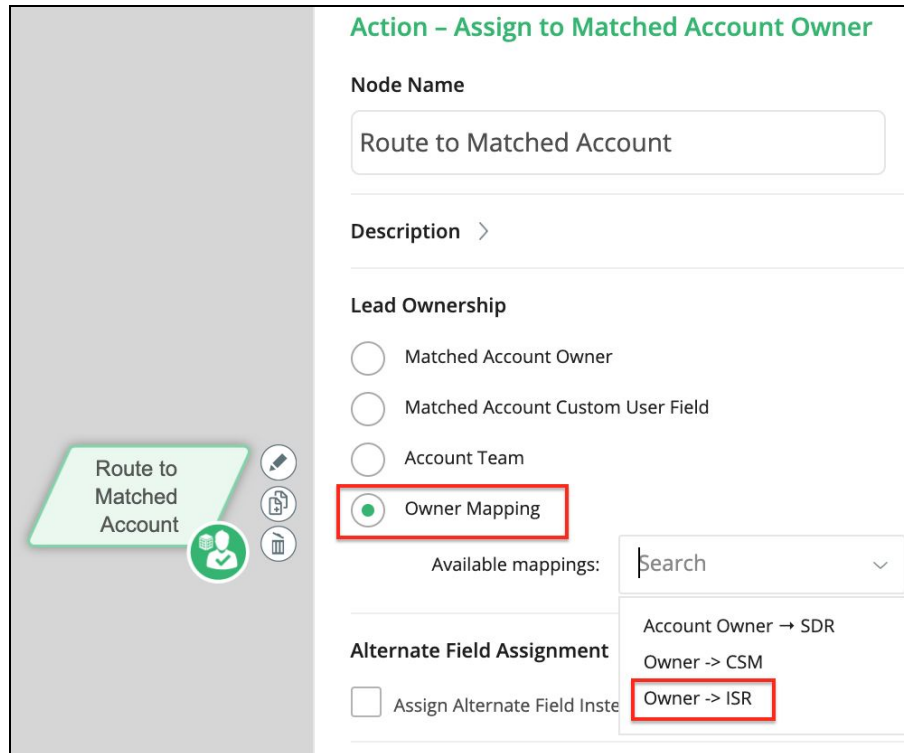
Cancel OK

You can then check the main page to view your Owner Mappings.

Routing via Owner Mappings in FlowBuilder

To assign leads based on an Owner Mapping, use the Match To Account Node.

Under Lead Ownership, choose the Owner Mapping option. From the dropdown menu, select the Owner Mapping Assignment you want applied to the node.



Action - Assign to Matched Account Owner

Node Name
Route to Matched Account

Description >

Lead Ownership

- Matched Account Owner
- Matched Account Custom User Field
- Account Team
- Owner Mapping

Available mappings:

- Account Owner → SDR
- Owner -> CSM
- Owner -> ISR

Alternate Field Assignment

Assign Alternate Field Instance

Once the Owner Mapping Assignment is selected, records that reach this node will be assigned to the User who is Mapped to the Owner of the Matched Account according to the selected Owner Mapping Assignment.

If the owner of the Matched Account is not specified as an Owner in the Owner Mapping Assignment you have referenced, your record will follow the "No Mapping Found" edge under the Advanced Settings section of the node.

Advanced Settings ▾

Specify backup actions to take in cases where the primary assignment action meets a condition below.

Condition	Label	Target
Invalid/Inactive User	Invalid/Inactive User	END OF FLOW ▾
No Mapping Found	No Mapping Found	END OF FLOW ▾
Next Node	Next Node	END OF FLOW ▾