LeanData Tagging

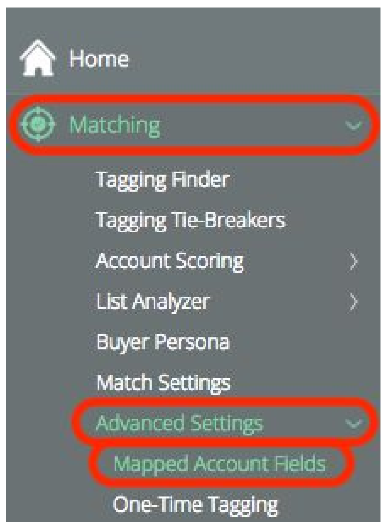
Mapped Account Fields Guide

Overview

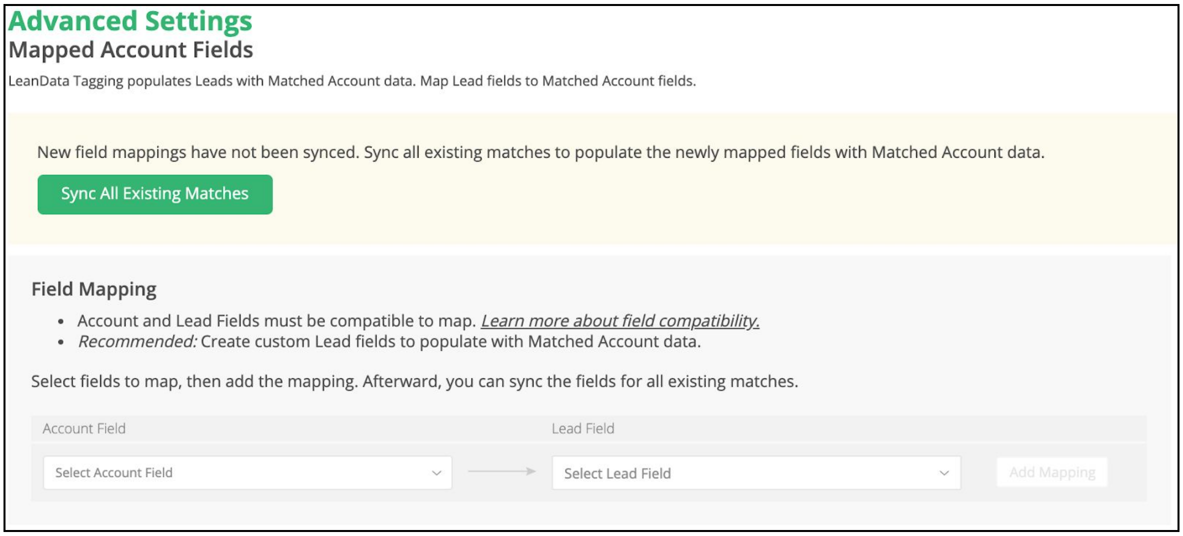
Tagging refers to when a Lead Field becomes populated with information from a Matched Account. When a Lead is successfully matched to an Account by LeanData, that Lead will be tagged with Account-level information. The Account-level information that LeanData pulls onto the Lead is dictated by the field mappings you configure on our Mapped Account Fields page.

Accessing Field Mappings

In order to access the Mapped Account Fields section you must go to the LeanData app. Click the Matching section, Advanced Settings, and then click the Mapped Account Fields tab.



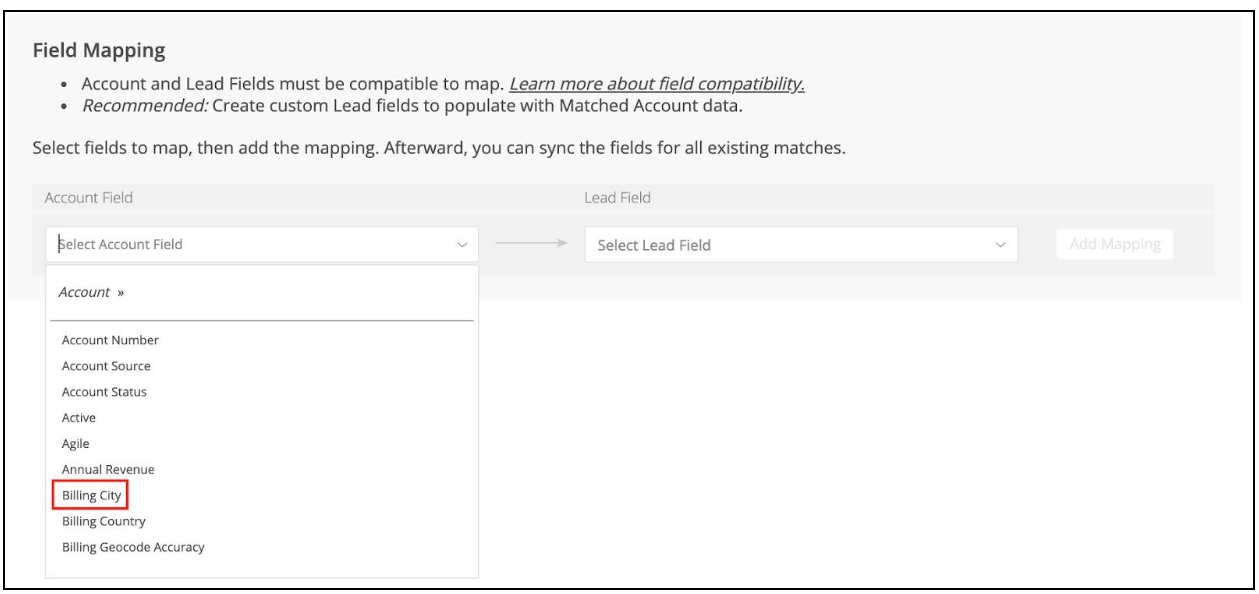
This will take you to a screen that shows the Mapped Account Fields, which you can see below.



LeanData provides a standard Field on your Leads named “Reporting Matched Account”. This Field is not viewable within the Mapped Account Fields.

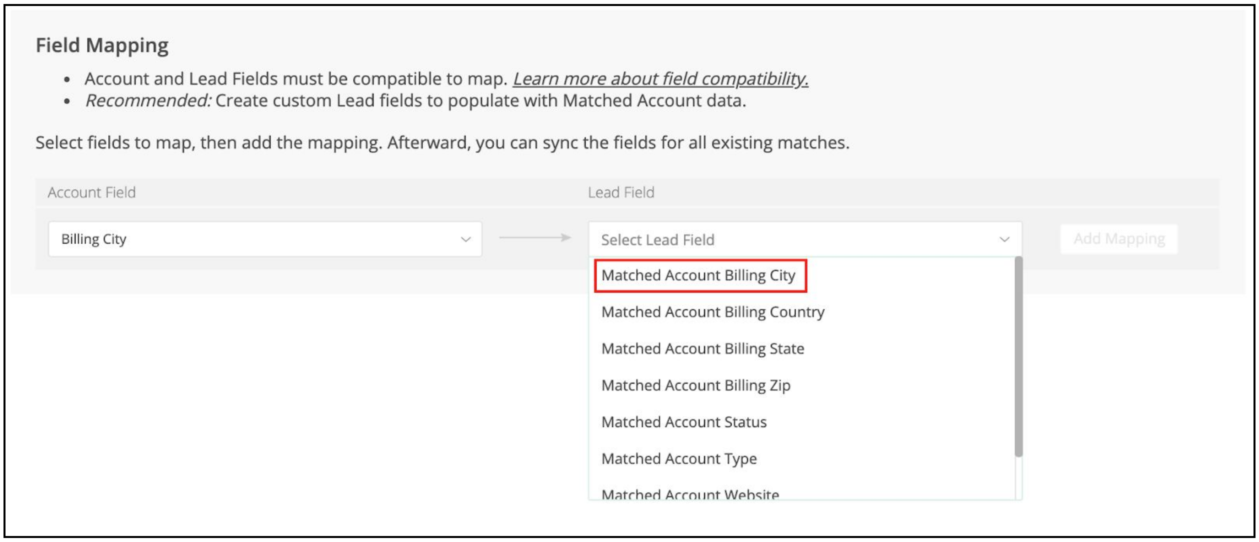
Creating Field Mappings

You can create a new Field Mapping by selecting the Account Field you want to Map from the picklist.

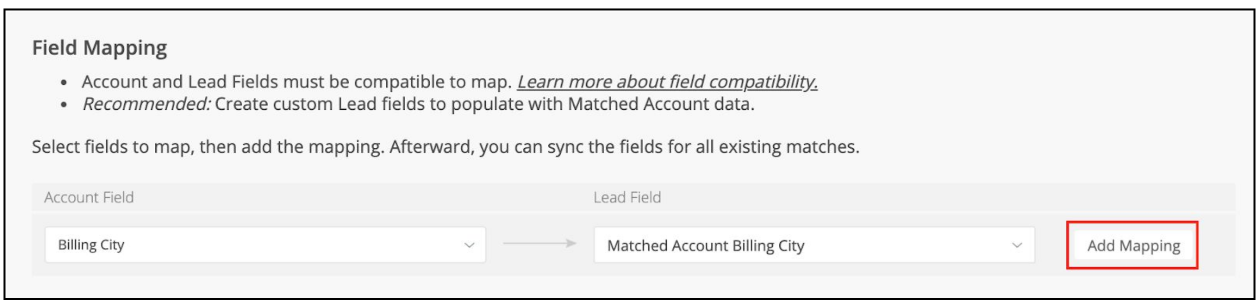


Then in the Lead Field Column, you can select the Field that you want to populate with the Account value.

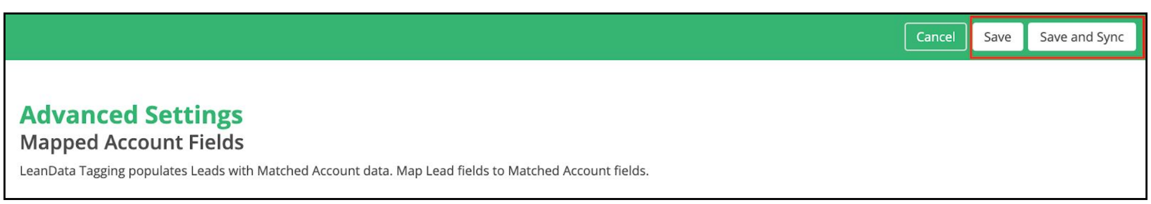
Note: We recommend creating a new Lead Field in Salesforce to prevent data from being overwritten on the Lead. The Lead Field Type should match the Field Type of the Account Field from which the value will be mapped. (i.e you would have to create a field “Matched Account Billing Country” specifically to receive the Account Value for this Field Mapping.)



Then, click **Add Mapping** on the right.



You would repeat this for as many mappings as you wish. Hit **Save** or **Save and Sync** in the upper right when you are done.

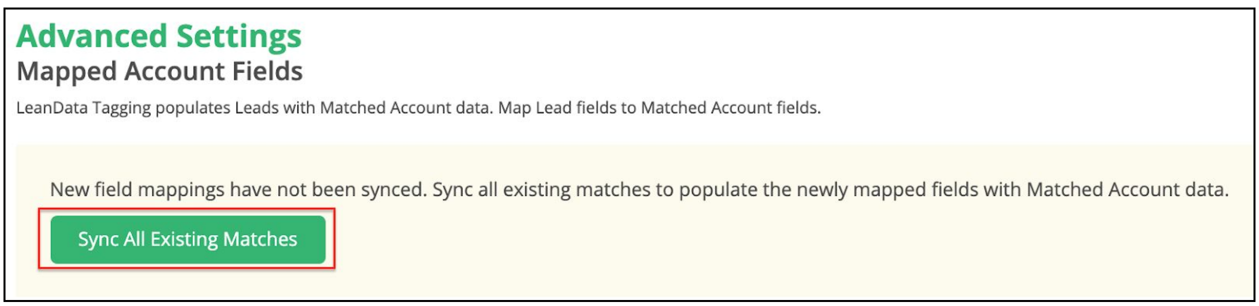


Save would commit your changes and LeanData would ensure the new mappings are respected for every Lead tagged from this point forward. However, Leads already tagged would not be updated to reflect you new mappings.

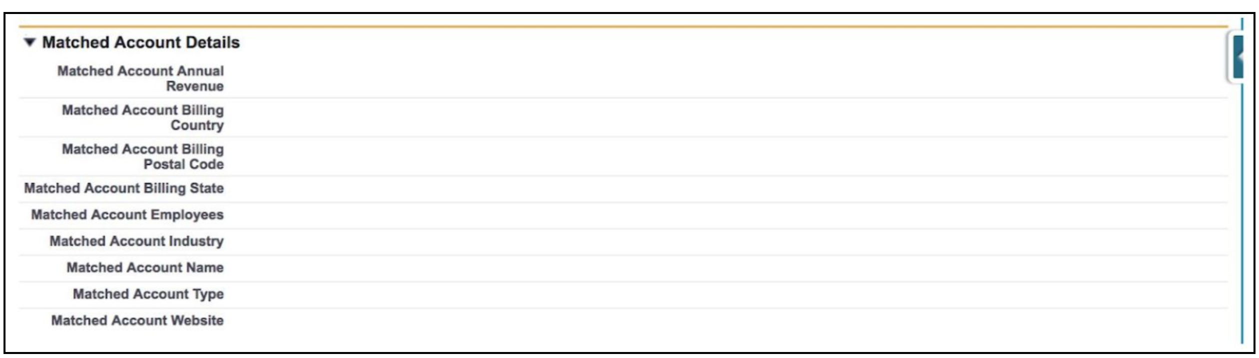
In order to update the new Mapped Fields on all the Leads that have already been tagged in your instance, you would use **Save and Sync**.

Sync All Existing Matches.

If you ever need to sync Mapped fields for all your existing matches, you can click the Sync All Existing Matches button. LeanData will kick off a job that will update all of the Mapped Accounts Fields on leads that have already been matched with the appropriate new information. This job will not make new matches, but simply update information based on existing matches.



The Mapped Account Fields and their values will be displayed on the Lead Record. Please note that if you have not already created a section for the Mapped Account Fields you must do so in order for them to display on the Lead Record. You can see an example of what this section could potentially look like below.



Mapping Field Types

Below, please find a mapping of which Account Field Types correspond to which Lead Field Types:

Account Field Type	Lead Field Type
Text	Text
Picklist	Text
Multi-Select Picklist	Multi-Select Picklist
Formula	Whichever Field Type the Formula Outputs
Roll Up	Number
Number	Number
Checkbox	Checkbox
Text Area	Text Area
Record Type Name	Text
Record Type ID	Text
Lookup ID	Text (for the ID itself) / Lookup (for an actual Lookup link)
Owner.Name	Text
Currency	Currency