

LeanData Tagging

Mapped Account Fields Guide



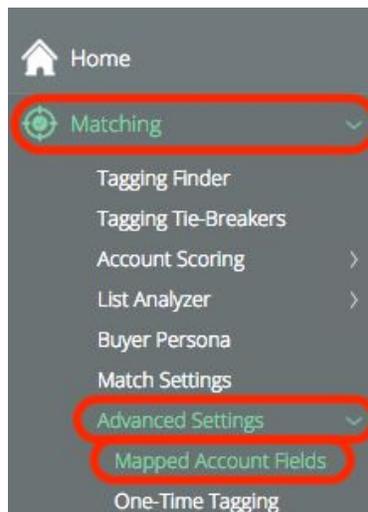
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Overview

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.

Advanced Settings

Mapped Account Fields

LeanData Tagging populates Leads with Matched Account data. Map Lead fields to Matched Account fields.

New field mappings have not been synced. Sync all existing matches to populate the newly mapped fields with Matched Account data.

[Sync All Existing Matches](#)

Field Mapping

- Account and Lead Fields must be compatible to map. [Learn more about field compatibility.](#)
- *Recommended:* Create custom Lead fields to populate with Matched Account data.

Select fields to map, then add the mapping. Afterward, you can sync the fields for all existing matches.

Account Field	Lead Field
<input type="text" value="Select Account Field"/>	<input type="text" value="Select Lead Field"/>
<input type="button" value="Add Mapping"/>	

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.

Field Mapping

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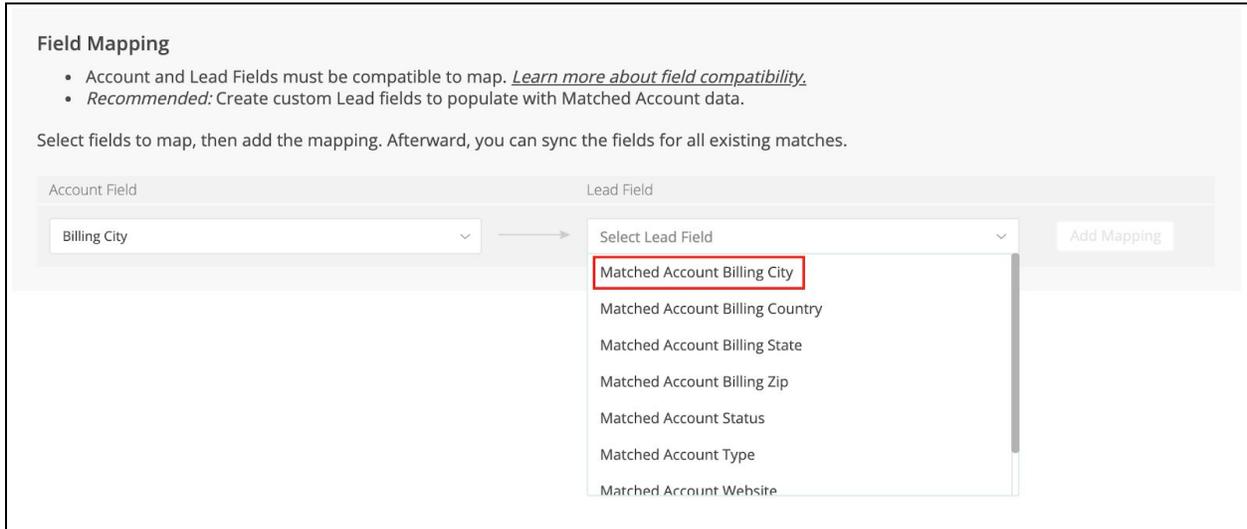
Account Field	Lead Field
<input type="text" value="Select Account Field"/>	<input type="text" value="Select Lead Field"/>
<input type="button" value="Add Mapping"/>	

Account »

- Account Number
- Account Source
- Account Status
- Active
- Agile
- Annual Revenue
- Billing City**
- Billing Country
- Billing Geocode Accuracy

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.)



Field Mapping

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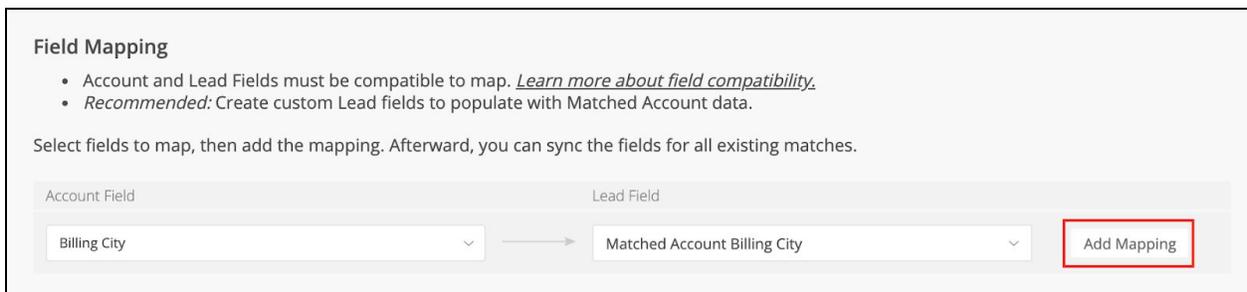
Account Field: Billing City

Lead Field: Select Lead Field

- Matched Account Billing City
- Matched Account Billing Country
- Matched Account Billing State
- Matched Account Billing Zip
- Matched Account Status
- Matched Account Type
- Matched Account Website

Add Mapping

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



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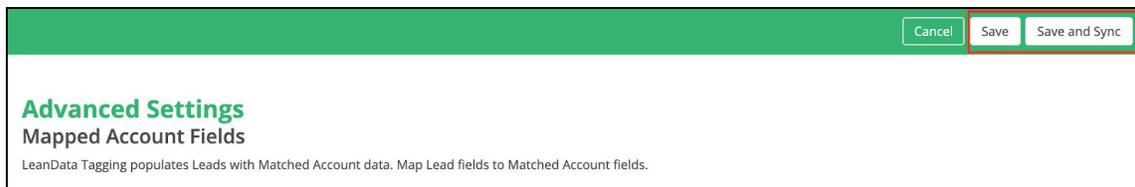
Select fields to map, then add the mapping. Afterward, you can sync the fields for all existing matches.

Account Field: Billing City

Lead Field: Matched Account Billing City

Add Mapping

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.



Cancel Save Save and Sync

Advanced Settings
Mapped Account Fields

LeanData Tagging populates Leads with Matched Account data. Map Lead fields to Matched Account fields.

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 your 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 Account 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.

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[Sync All 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.

▼ Matched Account Details
Matched Account Annual Revenue
Matched Account Billing Country
Matched Account Billing Postal Code
Matched Account Billing State
Matched Account Employees
Matched Account Industry
Matched Account Name
Matched Account Type
Matched Account Website

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