OWNER MATCH

Product Documentation

Automate HubSpot record ownership with reusable property-to-owner mappings.

Documentation scope

Getting started, configurations, mappings, workflow execution, CSV import/export, supported CRM objects, troubleshooting, and best practices.

Documentation edition: September 2026

Owner Match is accessed directly from HubSpot and does not require a separate product account or external login.

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Quick start

> **The shortest path to a working assignment**
>
> Create one configuration, add at least one property-value-to-owner mapping, add the Owner Match action to a workflow for the same CRM object, then enroll a record whose configured property matches one of your mappings.

1. Open Owner Match and select New Configuration.
2. Choose a CRM object and the property that should drive ownership.
3. Map each expected property value to a HubSpot owner.
4. Save the configuration.
5. In a HubSpot workflow for the same CRM object, add the Owner Match custom workflow action and select the configuration.
6. Enroll or test a record with a matching property value, then verify that its owner changed.

1. About Owner Match

Owner Match helps HubSpot teams assign CRM records to the right owner based on the value of a selected record property. Instead of maintaining large workflow branches for routing logic, you create reusable configurations that connect property values to HubSpot owners.

Core concept	A configuration maps one CRM object property to one or more HubSpot owners.
Execution	A custom Owner Match workflow action applies the configuration to each enrolled record.
Matching	The action reads the live value of the configured property when the workflow action runs.
Result	When a matching mapping exists, Owner Match updates the record owner in HubSpot.
Administration	Configurations can be created, viewed, edited, deleted, imported from CSV, and exported to CSV.

Common use cases

- Route leads or contacts by country, region, market, language, or segment.
- Assign companies based on territory or another company property.
- Assign deals based on a routing property used by your sales process.
- Route tickets using a ticket property.
- Apply the same property-to-owner routing model to supported custom objects.

2. How Owner Match works

At runtime, Owner Match evaluates one enrolled record at a time. The workflow action uses the configuration selected in the workflow step.

Step 1	Step 2	Step 3	Step 4
1 Workflow record	2 Read property	3 Find mapping	4 Assign owner

Important: matching uses the property value available on the HubSpot record when the action executes. If the property is empty or there is no mapping for that value, no owner is assigned by Owner Match.

3. Requirements and installation

Before you start

- A HubSpot account where you are permitted to install marketplace apps and grant the requested permissions.
- Access to HubSpot workflows for the CRM object you want to route.
- At least one HubSpot owner that can be selected as an assignment target.
- A record property whose value can be used as the routing key.

> **Custom objects**
> Custom objects are supported when the optional HubSpot custom object permissions required by Owner Match are granted for the installed app.

Install Owner Match

1. Install Owner Match from the HubSpot Marketplace.
2. Review and approve the permissions shown by HubSpot.
3. After installation, open Owner Match from HubSpot.
4. On first use, select Create Configuration from the Installation Complete screen, or go to the dashboard and select New Configuration.

No separate login is required. The Owner Match user interface is accessed from HubSpot after installation.

4. Create a configuration

A configuration defines the routing context: the CRM object, the property to inspect, and the mappings that connect property values to owners. The configuration wizard contains three steps.

Step 1 - Name

Enter a clear name that makes the configuration easy to identify when it appears in the Owner Match workflow action.

> **Example**
> Contact routing by country

Step 2 - Entity & Property

Choose the CRM object (shown as Entity in the wizard) and then choose the property that should drive the assignment. The property belongs to the selected object.

Step 3 - Mappings

Add the property values you expect to encounter and select the HubSpot owner that should receive records with each value. Mappings can be added manually or imported from CSV.

Property value	Owner	Meaning
Italy	italy.owner@example.com	Records where the selected property is Italy are assigned to this owner.
France	france.owner@example.com	Records where the selected property is France are assigned to this owner.

Example emails above are illustrative. Select real HubSpot owners from your account.

Save the configuration

Select Save Configuration when the mappings are valid. The saved configuration appears on the Owner Match dashboard and becomes available to the workflow action for the corresponding CRM object.

5. Build and manage mappings

Add a mapping manually

1. Open the Mappings step in a new or existing configuration.
2. Select Add mapping.
3. Enter or select the property value.
4. Select the HubSpot owner.
5. Save the mapping, then save/update the configuration.

Validation rules

Owner Match validates mappings before the configuration is saved. Relevant checks include:

- A property value is required.
- An owner is required.
- Each property value must be unique within the configuration; values that differ only by capitalization or surrounding whitespace are treated as duplicates for validation.
- Enumeration properties must use a value that belongs to the property options.
- Date values must use a valid date in YYYY-MM-DD format.
- Number properties must contain a valid numeric value.
- Boolean properties must use true or false.
- Inactive or unresolved owners are surfaced for review before saving.

Property values and matching

Use values that match what HubSpot stores on the record. For dropdown/enumeration properties, Owner Match helps resolve valid options during configuration. For free-text properties, keep your source data consistent so the runtime value matches a configured mapping.

> **Design tip**
> Choose a routing property with controlled, predictable values whenever possible. Dropdown/select properties are often easier to maintain than unrestricted free text.

6. Use Owner Match in HubSpot workflows

The workflow action is where a saved configuration is applied to HubSpot records.

1. Create or open a HubSpot workflow for the CRM object you want to route.
2. Add the Owner Match custom workflow action.
3. Select a configuration created for the same CRM object.
4. Save the action and finish your workflow setup.
5. Enroll or test a record whose selected property has a value included in the configuration.
6. After the action runs, open the record and verify the owner.

Execution outcomes

Situation	What Owner Match does
Matching mapping found	Assigns the mapped HubSpot owner to the record.
Configured property is empty	Does not assign an owner.
No mapping exists for the value	Does not assign an owner.
Configuration and workflow object do not match	The action cannot complete the intended assignment; review the workflow configuration.
Owner assignment cannot be completed	Review workflow history, owner availability, app access, and the configuration.

> **Recommended test**
> Start with a contact-based workflow and one simple mapping. Example: Contact Country = Italy -> a test HubSpot owner. This makes the end-to-end result easy to verify.

7. CSV import and export

CSV tools are designed for configurations with many mappings. You can download an example file from the import interface, preview imported rows before adding them, download an error report for invalid rows, and export an existing configuration.

CSV import format

The recommended format uses a semicolon delimiter and exactly these column names:

```
property_value;owner
Italy;italy.owner@example.com
France;france.owner@example.com
```

owner must identify a valid HubSpot owner by email address. The importer accepts semicolon-delimited and comma-delimited CSV files, while Owner Match-generated CSV files use the semicolon format.

Import mappings

1. In the Mappings step, open Import mappings from CSV.

2. Choose a .csv file.
3. Select Parse & Preview.
4. Review the preview and the status of each row.
5. If at least one row is valid, select Import valid rows to add those mappings to the current configuration.
6. Review the resulting mapping table and save/update the configuration.

CSV validation statuses

Status	Meaning / next action
Valid	The row can be imported.
Unknown owner	The owner email cannot be resolved to a HubSpot owner.
Invalid property value	The value is not valid for the selected property or property type.
Duplicate	The same normalized property value appears more than once or conflicts with an existing mapping.
Invalid format	The row or file structure cannot be interpreted as a valid mapping.

Error CSV

When invalid rows are present, Owner Match can prepare an error CSV. The report includes a third issue column so each rejected row can be corrected. An error report uses this structure:

```
property_value;owner;issue
```

Export a configuration

1. Open an existing configuration from the Owner Match dashboard.
2. Select Prepare CSV.
3. When the file is ready, select Download CSV.

The export contains the mappings for the complete configuration, not only the currently visible page of mappings.

8. Manage configurations

The Owner Match dashboard is the central place to manage saved assignment logic.

Action	Use it to
View	Review the configuration name, CRM object, property, mapping count, and mappings.
Edit	Change the configuration details or mappings and save the updated configuration.
Export	Prepare and download the configuration mappings as CSV.

Action	Use it to
Delete	Permanently remove a configuration and its mappings.

Before editing a live configuration

A configuration may already be selected in one or more HubSpot workflows. Treat changes to its mappings as changes to production routing logic and test important updates before relying on them at scale.

9. Supported CRM objects and data access

Supported objects

CRM object	Support
Contacts	Supported
Companies	Supported
Deals	Supported
Tickets	Supported
Custom objects	Supported when the required optional custom object permissions are granted

How HubSpot data is used

Owner Match uses HubSpot data required to configure and execute assignment rules. In practical terms:

- CRM object and property metadata are used so you can choose the routing target and routing property.
- HubSpot owner information is used so mappings can point to valid owners.
- When the workflow action executes, Owner Match reads the configured property from the enrolled record.
- When a mapping is found, Owner Match writes the corresponding owner assignment to that record.
- Custom object access is optional and is only relevant when you use Owner Match with custom objects.

For the complete list of permissions, privacy information, and legal terms, refer to the Owner Match HubSpot Marketplace listing and the policies linked from that listing.

10. Troubleshooting

Problem	What to check
The record owner did not change	Confirm the workflow action ran, the selected configuration is for the same CRM object, and the record property contains a value configured in a mapping.
The property is empty	Populate the configured property before the Owner Match action runs, or add workflow logic to handle records with missing routing data.
No mapping is found	Open the configuration and compare the record value with the configured property values. Add the missing value if it should be routed.
An owner cannot be resolved	Confirm that the owner still exists in HubSpot and is appropriate for assignment. Update mappings that reference inactive or unknown owners.
CSV import reports Unknown owner	Use the email address of a valid HubSpot owner in the owner column.
CSV import reports Duplicate	Keep one mapping per property value. Remove duplicate rows or conflicting existing mappings.
CSV import reports Invalid property value	Use a value accepted by the selected property. For dates use YYYY-MM-DD; for booleans use true/false.
CSV file is rejected	Use a .csv file with property_value and owner headers. Semicolon is recommended; comma is also accepted.
Configuration cannot be selected in a workflow	Confirm that the configuration and workflow use the same CRM object and that the configuration is saved.
A usage or configuration limit is reached	Review the plan/usage information shown in Owner Match. Available limits can vary by plan.

A useful diagnostic sequence

1. Open the enrolled HubSpot record and note the current value of the configured routing property.
2. Open Owner Match and verify that an exact intended mapping exists for that value.
3. Verify that the mapped owner is still available in HubSpot.
4. Open the HubSpot workflow and verify that the correct Owner Match configuration is selected.
5. Review the workflow execution history for the record.

11. Best practices

Use descriptive configuration names. Names such as "Contact routing - Country" or "Deal routing - Region" are easier to identify in workflow actions than generic names.

Prefer controlled routing values. Dropdown/select properties reduce inconsistencies and make mapping maintenance easier than free-text values.

Keep one source of truth. Update routing mappings in Owner Match rather than duplicating the same routing logic across many workflow branches.

Test changes with a sample record. After meaningful mapping changes, test a record whose routing value and expected owner are known.

Review owner changes. When HubSpot users or owners are deactivated or reorganized, review Owner Match configurations for affected assignments.

Use CSV for bulk maintenance. For large mapping sets, export the configuration, maintain a clean two-column mapping dataset, and use import preview to catch issues before saving.

12. Support

For product support, use the support contact information provided on the Owner Match HubSpot Marketplace listing. When reporting an issue, include enough context to reproduce the behavior without sharing sensitive CRM data unnecessarily.

Helpful information to include

- The CRM object involved (for example Contact or Deal).
- The configuration name.
- The property used for routing.
- Whether the issue occurs during configuration, CSV import/export, or workflow execution.
- The error message shown in Owner Match or HubSpot, if any.
- A brief description of the expected result and the actual result.

> **Security reminder**
> Do not send access tokens, passwords, or unnecessary personal CRM data in a support request.

Owner Match

Automatically match every HubSpot record with the right owner.