

LeanData Tagging

One-Time Tagging Guide



Overview	3
Why would I use One-Time Tagging?	3
How to use One-Time Tagging	3
Understanding the Progress and Results of One-Time Tagging	5

Overview

LeanData's One-Time Tagging solution enables a user to run a One-Time Tagging Job which will match Leads to Accounts and populate Lead Fields with Matched Account Field Values.

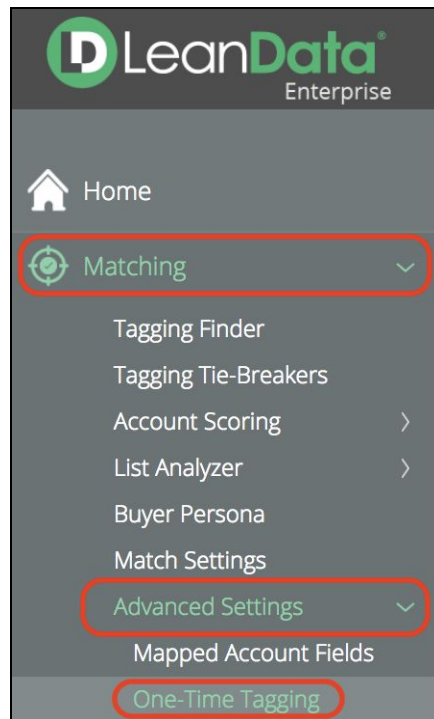
Why would I use One-Time Tagging?

You may want to use One Time Tagging to match all of the existing leads in your system that were created before you installed LeanData.

Also, if you updated the Tagging Tie-Breakers or filters, or changed any Matching Settings, you will have to run a One-Time Tagging job to ensure your matches reflect your new preferences.

How to use One-Time Tagging

To access the one-time tagging section within the app, navigate to the matching section, click the advanced settings tab, and then click into the One-Time tagging section.



Once at the One-Time Tagging section, you can identify the records you wish to tag either by CSV upload or SOQL query.

Selecting a CSV File

Create a CSV file containing a column of the record IDs you wish to tag. The IDs can either be 15 or 18 digits in length. If your CSV file contains a header row, you will need to click the button for 'Include header row at the top' under the file name and select the column with IDs.

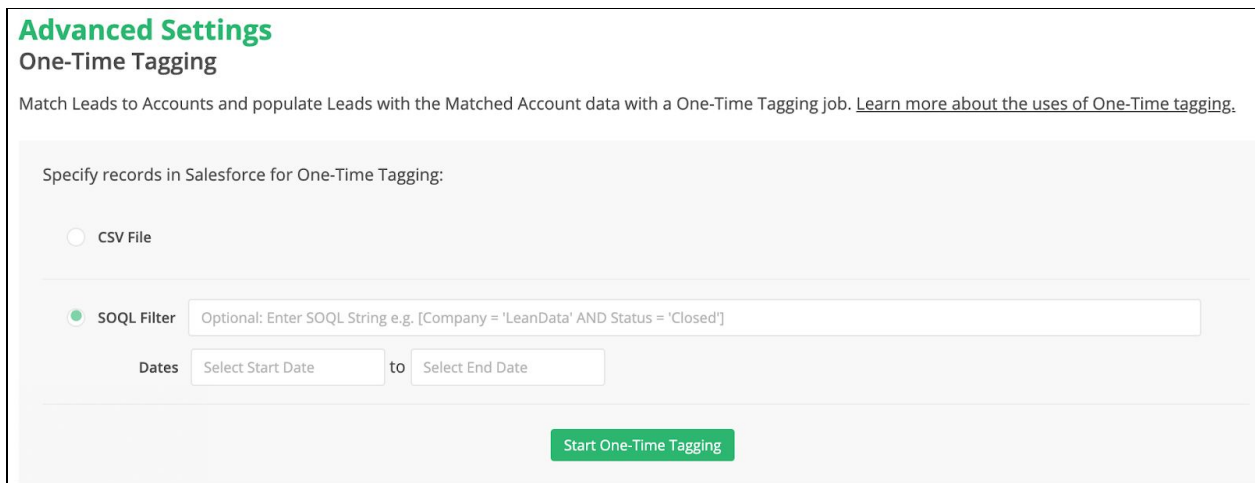
Please Note: if you export a CSV file from Salesforce, you will have to remove any copyright text that is appended to the end of your CSV.

Using a SOQL Filter

Alternatively, you can use a SOQL query to identify the records you wish to process in the One-Time Tagging job. You can follow the format [FieldName1 = 'Value1' AND FieldName2 = 'Value2'].

For example if you wanted to Tag all Lead records with a Lead Source of Event and a Status of Unqualified, you can enter [LeadSource = 'Event' AND Status = 'Unqualified'] without the brackets.

Within the SOQL option, you can also define a Date range, and Lead records created within that date range will be Tagged.



Once you have identified the records you wish to tag using either a CSV upload or a SOQL filter, click the “Start One-Time Tagging” button.

After clicking the “Start One-Time Tagging” button, you will be prompted to confirm the tagging job with the date and query parameters selected above prior to initiating the Tagging job. If everything looks as it should, click the “Yes, Start One-Time Tagging” button to begin the job.

1416 Records identified in the conditions.

Are you sure you want start One-Time Tagging of these 1416 Leads?

After starting the one time tagging job, you will be able to see the progress of the job as it completes on the same screen.

Understanding the Progress and Results of One-Time Tagging

There are a few data points that will be displayed as the tagging job processes.

One-Time Tagging Runs						
Run Date	Start Date	End Date	Source	User	Completion	Status
02/10/2021	Beginning of Time	02/10/2021	View SOQL Condition	Doc Brown	83.8%	Processing <input style="background-color: #28a745; color: white; padding: 2px 5px;" type="button" value="Cancel Run"/>

Run Date: The date and time the One-Time Tagging job was initiated.

Start and End Date: The dates configured in your job parameters.

Source: Displays how the Leads for the One-Time Job were identified.

User: The user who initiated the tagging job.

Completion Date: The date and time of when the One-Time Tagging job ended. This field is populated only once the job has finished processing.

Completion: The percentage at which your job is currently at as it nears completion.

Status: Details if the job is processing, on hold, failed, or completed.

Cancel Run: Allows you to cancel the One-Time Tagging job. Please note that if you abort while the job is running that none of the tags that were processed will be finalized.

Once the Tagging Job has concluded, your Mapped Lead Fields will be updated with the current values.