

LeanData Admin

Managed App Technical Overview



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Overview

The following guide contains a high level overview of the LeanData managed app. Various fields, triggers, and objects are utilized depending on products purchased and implemented.

The following are available LeanData products:

1. **Matching**
 - a. Lead-to-Account Tagging
 - b. Account fields on Matched Leads
 - c. List Analyzer
 - d. Account Scoring
 - e. Buyer Persona
2. **Lead Routing**
3. **Contact Routing**
4. **Attribution** (multi-touch marketing attribution)
5. **Lead-to-Account View**
6. **LeanData Engagement**

Managed App Fields

The following are the core managed app fields on existing Salesforce objects. Any associated LeanData managed app fields not listed below may have been removed in prior versions of LeanData.

Lead Object Fields

Application Fields

The following fields can be used for reporting or operational purposes.

Field	Purpose	API Name
Matched Buyer Persona	Lookup field of Buyer Persona. Used to store matching Buyer Persona reference (only used if Matching Buyer Persona product is implemented)	LeanData__Matched_Buyer_Persona__c
Reporting Matched Account	Matched account reference field (only populated if a matched	LeanData__Reporting_Matched_Account__c

	account exists)	
Routing Action	Lead's Router action: contains last associated Router action on a lead	LeanData__Routing_Action__c

Internal Fields

The following fields are intended for core LeanData application usage. These fields should not be used (for either reporting or operational purposes) and are subject to deletion or change at any time.

Field	Purpose	API Name
LeanData Search	Operational field used for match performance optimizations	LeanData__Search_Index__c
Modified Score	Used in conjunction with LeanData Account Scoring product	LeanData__Modified_Score__c
Reporting Timestamp	Operational field used for LeanData Matching	LeanData__Reporting_Timestamp__c
LeanData Routing Status	Lead's status for Lead-to-Account routing	LeanData__Routing_Status__c
Segment	Used for debugging purposes	LeanData__LD_Segment__c
State info	Operational field used to track how a lead's state across various LeanData products	LeanData__Status_Info__c

Deprecated Fields

Field	Purpose	API Name
LeanData Matched Lead (deprecated)	Deprecated	LeanData__Matched_Lead__c

LeanData Router Status (obsolete)	Deprecated	LeanData__Router_Status__c
LeanData Search (obsolete)	Deprecated	LeanData__Search__c

Contact Object Fields

Application Fields

The following fields can be used for reporting or operational purposes.

Field	Purpose	API name
Matched Buyer Persona	Lookup field of Buyer Persona. Used to store matching Buyer Persona reference (only used if Matching Buyer Persona product is implemented)	LeanData__Matched_Buyer_Persona__c
Routing Action	Contact's Router action: contains last associated Router action on a contact	LeanData__Routing_Action__c

Internal Fields

The following fields are intended for core LeanData application usage. These fields should not be used (for either reporting or operational purposes) and are subject to deletion or change at any time.

Field	Purpose	API Name
Modified Score	Used in conjunction with LeanData Account Scoring product	LeanData__Modified_Score__c
Segment	Used for debugging purposes	LeanData__LD_Segment__c

Account Object Fields

Application Fields

The following fields can be used for reporting or operational purposes.

Field	Purpose	API Name
Routing Action	Account Routing action: contains last associated Routing action on an account	LeanData__Routing_Action__c

Internal Fields

The following fields are intended for core LeanData application usage. These fields should not be used (for either reporting or operational purposes) and are subject to deletion or change at any time.

Field	Purpose	API Name
LD Email Domains	Email domains for Contacts under this account (used for matching)	LeanData__LD_EmailDomains__c
LeanData Search	Operational field used for match performance optimizations	LeanData__Search__c

Campaign Object Fields (Attribution only)

Application Fields

The following fields can be used for reporting or operational purposes. These fields are only applicable for customers who are subscribed to LeanData Attribution.

Field	Purpose	API Name
Back-Dated	Used for Attribution: Signifies if a Campaign is back-dated	LeanData__Back_Dated__c
LD FT Attribution	Used for Attribution: Total First	LeanData__Reporting_FT_Attrib

	Touch Attribution from Influenced Opportunities	ution_Amount__c
LD FT Bookings Attribution	Used for Attribution: Total First Touch Attribution from Influenced Closed Won Opportunities	LeanData__Reporting_FT_Bookings_Attribution__c
LD LT Attribution	Used for Attribution: Total Last Touch Attribution	LeanData__Rep_LT_Attribution__c
LD LT Bookings Attribution	Used for Attribution: Total Last Touch Attribution from Closed Won Opportunities	LeanData__Rep_LT_Bookings_Attribution__c
LD LT Generated Bookings Attribution	Used for Attribution: Total Last Touch Attribution from Generated (pre-opportunity creation) Closed Won Opportunities	LeanData__Rep_LT_Generated_Bookings_Attribution__c
LD MT Attribution	Used for Attribution: Total Multi-Touch Attribution from all relevant marketing touch points	LeanData__Reporting_MT_Attribution_Amount__c
LD MT Accelerated Attribution	Used for Attribution: Total Multi-Touch Attribution from all Accelerated (post-opportunity creation) touch points	LeanData__Rep_MT_Accelerated_Attribution__c
LD MT Accelerated Bookings Attribution	Used for Attribution: Total Multi-Touch Attribution from all Accelerated (post-opportunity) touch points from Closed Won Opportunities	LeanData__Rep_MT_Accelerated_Bookings_Attr__c
LD MT Bookings Attribution	Used for Attribution: Total Attribution from all relevant touch points from Closed Won Opportunities	LeanData__Reporting_Bookings_Attribution__c
LD MT Generated Attribution	Used for Attribution: Total Multi-Touch Attribution from all Generated (pre-opportunity) touch points	LeanData__Rep_MT_Generated_Attribution__c

LD MT Generated Bookings Attribution	Used for Attribution: Total Multi-Touch Attribution from all Generated (pre-opportunity) touch points from Closed Won Opportunities	LeanData__Rep_MT_Generated_Bookings_Attribution__c
Reporting Average Days to Close	Used for Attribution: Average days to close for Opportunities impacted by this Campaign	LeanData__Reporting_Average_Days_To_Close__c
Reporting Cost	Used for Attribution: Captures Campaign Cost	LeanData__Reporting_Cost__c
Reporting MT Attribution	Used for Attribution: Total Multi Touch Attribution from Influenced Opportunities	LeanData__Reporting_MT_Attribution_Amount__c
Reporting Number Of Opportunities	Used for Attribution: Number of Opportunities influenced by this Campaign	LeanData__Reporting_Number_Of_Opportunities__c
Reporting Number of Touches	Used for Attribution: Total # Of Relevant Marketing Touches under this Campaign	LeanData__Reporting_Number_Of_Touches__c
Reporting Opportunity Close Rate	Used for Attribution: Close Rate of Opportunities influenced by this Campaign	LeanData__Reporting_Opportunity_Close_Rate__c

Opportunity Object Fields (Attribution only)

Application Fields

The following fields can be used for reporting or operational purposes. These fields are only applicable for customers who are subscribed to LeanData Attribution.

Field	Purpose	API Name
Days in Stage	Used for Attribution: Total Days the Opportunity has been in this stage	LeanData__Days_In_Stage__c
Reporting Opportunity	Used for Attribution: Shows if	LeanData__Reporting_Opportun

Source	the Opportunity was sourced by Sales/Marketing	ity_Source__c
Reporting Total Marketing Touches	Used for Attribution: Total Marketing Touches on this Opportunity	LeanData__Reporting_Total_Marketing_Touches__c
Routing Action	Opportunity Routing action: contains last associated Routing action on an account	LeanData__Routing_Action__c

Activity (Task & Event) Object Fields (Engagement only)

Application Fields

The following fields can be used for reporting or operational purposes. These fields are only applicable for customers who are subscribed to LeanData Engagement.

Field	Purpose	API Name
LD Engagement	Used for Engagement: Displays Engagement associated with activity	LD_Engagement__c

Campaign Member Object Fields (Engagement only)

Application Fields

The following fields can be used for reporting or operational purposes. These fields are only applicable for customers who are subscribed to LeanData Engagement.

Field	Purpose	API Name
LD Engagement	Used for Engagement: Links the Campaign Member to the Sales or Marketing Engagement	LD_Engagement__c

LeanData Marketing Touch Custom Object

- Objects
 - LeanData__Marketing_Touch__c
 - LeanData__Temporary_Marketing_Touch__c
- Custom LeanData object (and associated temporary object) for the Attribution product (multi-touch marketing attribution). Please refer to our [Attribution Product Overview](#) for more details.

LeanData Engagement Custom Object

- Objects
 - LDAN__LD_Engagement__c
 - LDAN__Account_Metric__c
- Custom LeanData Objects for the LeanData Engagement product in the LeanData Analytics Managed package. Please refer to our [LeanData Engagement Product Overview](#) for more details.

LeanData Apex Jobs

Below is an overview of the primary Apex jobs that may run as part of your LeanData installation. Note some batches and scheduled jobs are specific to products and processes that are enabled and that some implementations may only run a portion of the batches below.

- **CCIOMigrationBatch**
 - Batch that runs when a new graph is deployed to migrate existing CCIOs to the new deployment.
- **CheckOnDemandAllowed**
 - Scheduled job that runs hourly. On execution, it calls a @future method (futureCheckOnDemandAllowed) that makes a web callout to LeanData servers to sync with settings and check on licensing. The web callout made by CheckOnDemandAllowed is a very lightweight call, meaning the impact to system resources is negligible.
- **LeadConverter**

- Job that runs whenever Router requires that a Lead be converted. This job will run after the corresponding LeanDataContinuousBatch and the job will abort after it finishes processing the conversions.
- **LeanDataContinuousBatch**
 - Apex Batch job that queries against the CC_Inserted_Object__c custom objects to find the inserts and updates waiting in queue to be processed for matching and routing. LeanData CC Scheduler is the Scheduled Job that fires off the batch. After LeanDataContinuousBatch finishes executing, a new instance of LeanData CC Scheduler gets scheduled for future processing. This is the loop that performs all of the matching and routing. Batch Apex jobs are limited to five at a time inside of an SFDC org. This limit and the allocation of jobs is controlled by the Salesforce Flex Queue system. At any given time in the system, only one LeanDataContinuousBatch job will be running (when a job slot is allocated by Salesforce), and that is only when we are actively routing Leads. This means that the resource impact on governor limits is minimal. Both of these jobs should always be scheduled by the desired LeanData integration user, so that any routing will show as having been performed by that user.
- **PopulateAccountEmailDomainBatch**
 - Batch job that runs on initial installation as well as periodically while LeanData application is actively running. This job is used for search data optimizations and indexing to allow LeanData search to run more effectively within Salesforce (for Accounts).
- **PopulateLeadSearchFieldBatch**
 - Batch job that runs on initial installation as well as periodically while LeanData application is actively running. This job is used for search data optimizations and indexing to allow LeanData search to run more effectively within Salesforce (for Leads).
- **RemoteLogger**
 - Batch job that runs periodically to send LeanData systems monitoring and logging data. This is used by LeanData in non-blind implementation to ensure application is active and running properly.
- **RoutingLogCleanBatch**
 - Batch Job that runs regularly to delete Logs older than 90 days from the current date. The time frame can be adjusted by a LeanData representative.
- **SchedulingMonitor**
 - Because LeanDataContinuousBatch and Scheduler are critical to routing of leads on the system and the loop could be interrupted for a number of reasons like user error, unexpected/uncatchable exceptions, or system updates, it is important to have redundancy to ensure that routing continues. SchedulingMonitor is a scheduled job that runs every hour to make sure that the

LeanDataContinuousBatch / Scheduler loop is still running. As with LeanDataContinuousBatch, this job should only be run as the LeanData user.

- **UpdateLeadForMappedFieldsBatch**
 - Runs as needed on-demand as a Queueable job if there are account updates that require leads to be run through lead-to-account matching.

Attribution Customers Only

- **Reporting_Scheduler**
 - Schedules the Attribution batches to run, starting with Reporting_DeleteMarketingTouches
- **Reporting_DeleteMarketingZTouches**
 - Clears out outdated Marketing Touch data. This runs before the other Attribution batches outlined below and deletes Marketing_Touch__c, Temporary_Marketing_Touch__c, Campaign_Opportunity__c, & Reporting_Setting__C as needed.
- **Reporting_CreateMarketingTouches**
 - Iterates over relevant Campaign Members as configured by the customer and calculates its relevance with related Opportunities. If a relevant link is found, it creates a Temporary_Marketing_Touch__c object with the appropriate fields.
- **Reporting_CalculateOpportunityMetrics**
 - Iterates over all relevant Opportunities in the system and calculates Attribution numbers on related Temporary_Marketing_Touch__c objects. Also updates the Opportunities with some summary level information.
- **Reporting_CalculateCampaignMetrics**
 - Iterates over all relevant Campaigns in the system and calculates Attribution numbers on related Temporary_Marketing_Touch__c objects. Also updates the Campaigns with some summary level information.
- **Reporting_CalculateAccountMetrics**
 - Iterates over all relevant Accounts in the system and calculates Marketing Influence metrics & Sales touch information. Updates the Accounts with the calculated information.
- **Reporting_SetCurrentMarketingTouches**
 - Copies Temporary_Marketing_Touch__c objects into Marketing_Touch__c objects. Also copies into Campaign_Opportunity__c object in some configurations.

Engagement Customers Only:

- **Eng_ProcessingBatch:**
 - Creates / Deletes Engagements

- **Eng_MetricsBatch:**
 - Creates / Updates Account Metrics Objects

Triggers

LeanData has implemented the following Triggers within the managed package (LeanData namespace). These Triggers are critical to ensure the LeanData managed app is running properly.

Account Triggers

- ContinuousCleanAccountTrigger (before insert, after insert)
 - Set Search Field
 - Set Routing Action for Accounts created from Lead Routing Conversion
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing and Tagging when applicable.
- ContinuousCleanAccountUpdateTrigger (before update, after update)
 - Set Search Field and Email Domains
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing, Tagging, and Update Mapped Lead Fields when applicable.
- AccountDeleteTrigger (before delete)
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Tagging.

Contact Triggers

- ContinuousCleanContactTrigger (after insert, after delete)
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing, Populate Account Email Domain Batch, and Buyer Persona when applicable.
- ContinuousCleanContactUpdateTrigger (after update)
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing, Populate Account Email Domain Batch, and Buyer Persona when applicable.
- ContactBeforeInsertTrigger (before insert)
 - If Contact is created from LeanData Lead Conversion we set Routing Action and map Lead Fields to Contact

Lead Triggers

- ContinuousCleanLeadTrigger (after insert)

- Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing, Tagging, and Buyer Persona when applicable.
- Checks on Live Routing's success if enabled and configured
- BeforeLeadInsert (before insert)
 - Sets Search Field(for Matching)
 - Syncs Reporting_Matched_Account__c's fields to the Lead object if this lookup is manually set on insert
 - Tries Live Routing if enabled and configured
- BeforeLeadUpdate (before update)
 - Updates Search Field if applicable(for Matching)
 - Syncs Reporting_Matched_Account__c's fields to the Lead object if this lookup is manually set on update
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing, Tagging, and Buyer Persona when applicable.
 - Tries Live Routing if enabled and configured

Opportunity Triggers

- ContinuousCleanOpportunityTrigger (after insert)
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing when applicable.
- ContinuousCleanOpportunityUpdateTrigger (before update)
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing when applicable.

Case Triggers

- ContinuousCleanCaseTrigger (after insert)
 - Creates LeanData's Token object(LeanData__CC_Inserted_Object__c) for Routing when applicable.

User Triggers

- addLeanDataPermissionSet (after insert, after update)
 - If LeanData Permission Sets(not SFDC permission sets) are mapped to profiles within the LeanData application, whenever a user is added/removed from a particular Profile we will add/remove the SFDC Permission Set associated with the LeanData Permission Set.

Configuration File

The following is only applicable if your Salesforce org has been qualified to run LeanData in a blind configuration. If you are uncertain, reach out to your Customer Success Manager for additional information. This configuration is subject to qualification and available after LeanData evaluation for additional implementation, support, and product subscription charges.

The configuration .bin file contains an encoded set of settings used by the LeanData managed app. In blind configurations, organizations are unable to get settings from the LeanData configuration server. As a result, LeanData Customer Success and Operations will enter product configurations and settings which are then sent over to a customer to upload into the LeanData managed app. Some of the settings include product availability / licensing, match configuration, and other product configurations (most of which are exposed within the LeanData Dashboard for customers to subsequently modify).