

LeanData Matching

List Analyzer Overview



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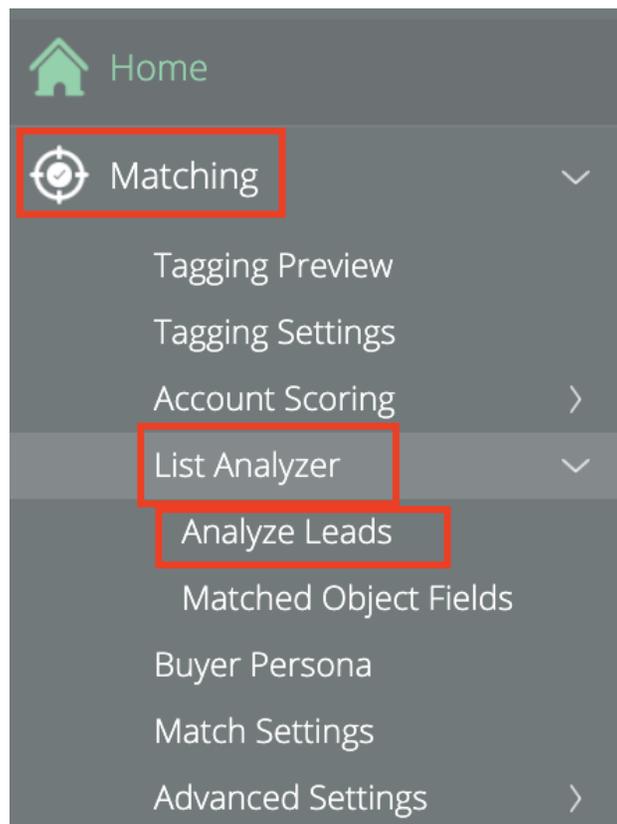
Overview

List Analyzer allows you analyze a list of potential Leads that have not yet been created in Salesforce and determine if there are any matches to other Leads, Contacts, or Accounts that currently exist in your Salesforce instance.

Note: List Analyzer will use the default out-of-the-box Tiebreakers to determine the best matches.

Analyze Leads

In order to access the List Analyzer section, you must go to the LeanData app. Click the Matching section, List Analyzer, and then click the Analyze Leads section.



Analyzer Wizard

Once inside the List Analyzer, click on the **Analyze New List** button. This will open the Analyzer Wizard page which will help guide you through the set-up.

List Analyzer

Analyze Leads

Analyze a list of leads to understand how they match to existing leads, contacts, and accounts. Leads will be matched and categorized against the following groups: Duplicate Contacts, Duplicate Leads, Matched Accounts, Matched Leads, No Match. A downloadable file for each group will be made available.

Analyze New List

Run Date	File	#Leads	Duplicate Contacts	Duplicate Leads	Matched to Account	Matched to Lead	No Match	User	Status
2018-10-11	Round Robin.csv	2	0	0	1	1	1	Daniel Test	Completed 

List Analyzer

Analyzer Wizard

Select a file of leads to send through the list analyzer. Note LeanData will not upload these leads into Salesforce.

- Select Lead Files**
- Map Fields
- Confirmation

Step 1: Select Lead File

Select a CSV file

Select File

Filename:
of Leads:
**Must include header row at the top*

Choose the CSV file you want to send through the List Analyzer. The CSV file must include a header row at the top.

**Note LeanData will NOT upload these leads into Salesforce.*

Click Next after uploading the file successfully.

Step 1: Select Lead File

Select a CSV file

Filename: List Analyzer Guide.csv
of Leads: 22

*Must include header row at the top

Map Lead Fields

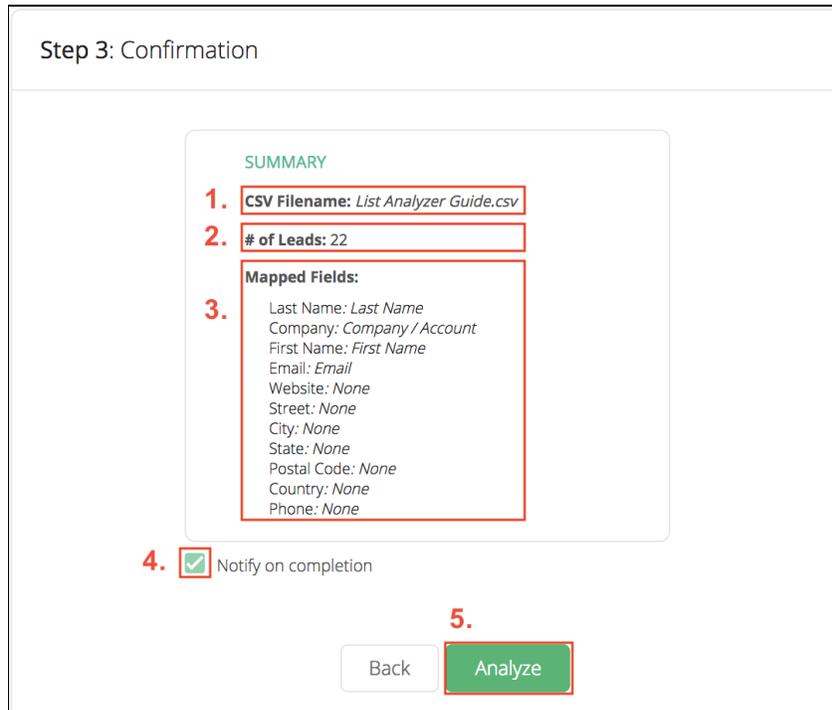
You will need to map the .CSV file headers with the corresponding Salesforce Lead Fields. The 'Last Name' field and 'Company' field are required. Leave the value as 'None' if the remaining fields do not contain the relevant Field Mappings. Click Next after mapping your fields.

Step 2: Map Lead Fields

Field	Mapped File Field
Last Name	<input type="text" value="Last Name"/>
Company	<input type="text" value="Company / Account"/>
First Name	<input type="text" value="First Name"/>
Email	<input type="text" value="Email"/>
Website	<input type="text" value="None"/>
Street	<input type="text" value="None"/>
City	<input type="text" value="None"/>
State	<input type="text" value="None"/>
Postal Code	<input type="text" value="None"/>
Country	<input type="text" value="None"/>
Phone	<input type="text" value="None"/>

*Indicates required fields

The confirmation page will include a summary before starting to analyze the Leads.



Step 3: Confirmation

SUMMARY

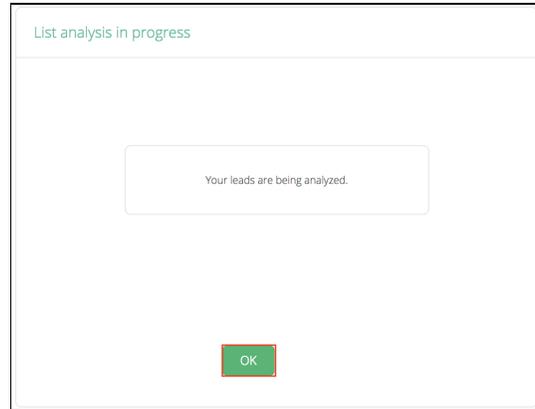
1. **CSV Filename:** *List Analyzer Guide.csv*
2. **# of Leads:** 22
3. **Mapped Fields:**
 - Last Name: *Last Name*
 - Company: *Company / Account*
 - First Name: *First Name*
 - Email: *Email*
 - Website: *None*
 - Street: *None*
 - City: *None*
 - State: *None*
 - Postal Code: *None*
 - Country: *None*
 - Phone: *None*
4. Notify on completion

5.

Back Analyze

1. Name of the CSV file that you have uploaded.
2. Indicates the number of Leads present on the file to be analyzed.
3. Shows the list of Mapped Fields selected in Step 2.
4. Notify on completion is checked by default. You can disable the notification if you chose.
5. After reviewing the information, click 'Analyze'.

The List Analyzer will begin to process the Leads. Click okay at the bottom of the screen to finish the Analyzer Wizard.



Once the List Analyzer job has completed, a results file will generate providing you with an insight into the analyzed Leads. Under the **Status** Column you can download the analyzed list to review the information in greater detail.

List Analyzer
Analyze Leads

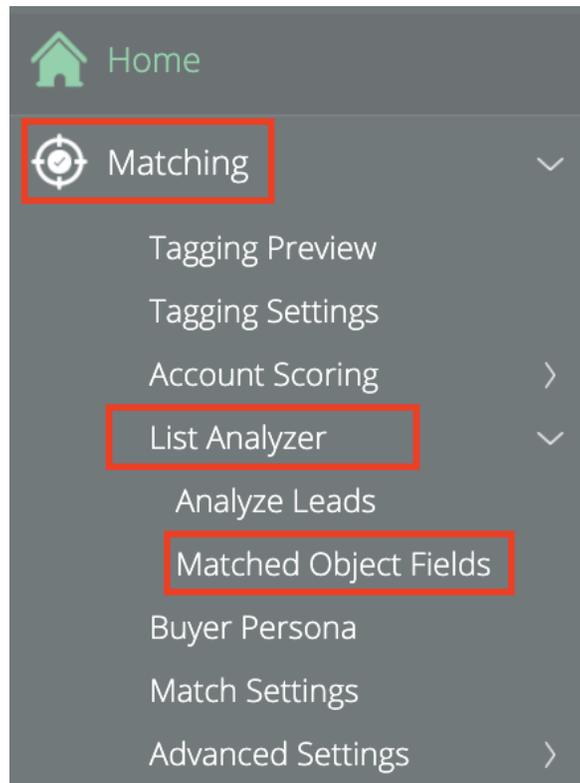
Analyze a list of leads to understand how they match to existing leads, contacts, and accounts. Leads will be matched and categorized against the following groups: Duplicate Contacts, Duplicate Leads, Matched Accounts, Matched Leads, No Match. A downloadable file for each group will be made available.

[Analyze New List](#)

Run Date	File	#Leads	Duplicate Contacts	Duplicate Leads	Matched to Account	Matched to Lead	No Match	User	Status
2018-10-30	List Analyzer Guide.csv	22	3	22	3	0	0	Daniel Test	Completed 
2018-10-11	Round Robin.csv	2	0	0	1	1	1	Daniel Test	Completed 

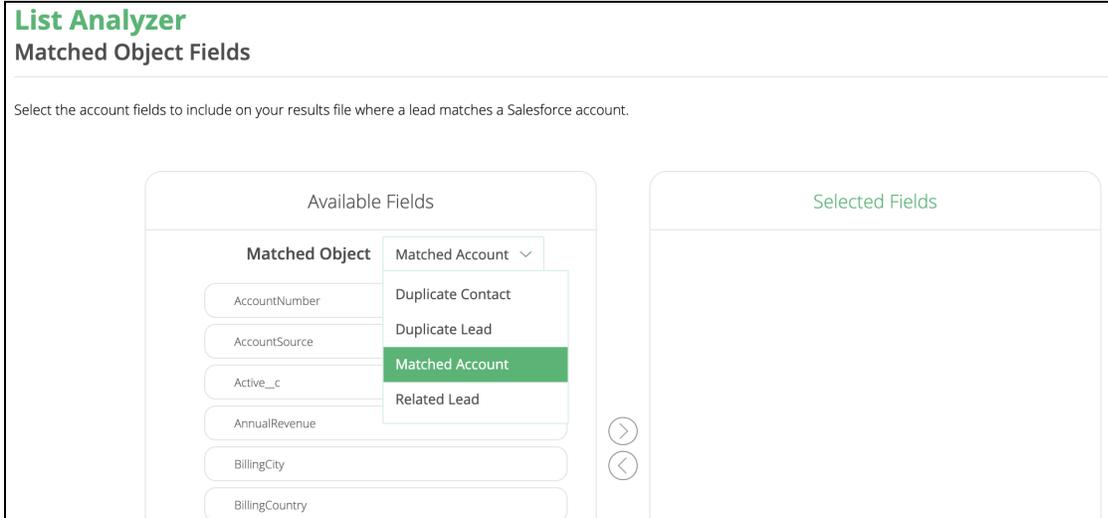
Matched Object Fields

This section allows you to select Matched Object Fields that will be viewable in the results download. Under the Matching section of the LeanData Dashboard, Select List Analyzer, then Matched Object Fields.

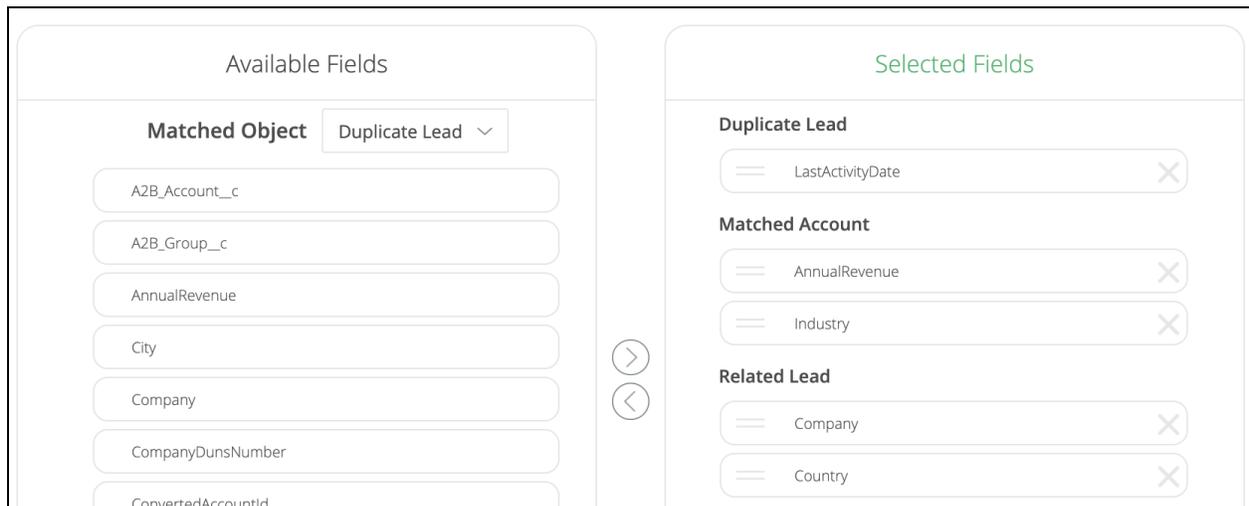


On the Matched Object Fields page you can select the object and its fields to include in the List Analyzer output final. You can include fields from the following objects:

- Duplicate Contact
- Duplicate Lead
- Matched Account
- Related Lead



Select the Object you wish to include fields from, on the Matched Object menu. Then select the field(s) to include in the output file. Use the arrow buttons to move the fields from Available Fields column to the Selected Fields column. In the Selected Fields column, the fields are separated by object type. Save your changes.



When viewing the .CSV the results will include columns that reference the Fields you selected.

C	D	E	F	G	H
Company / A Lead Source	Email		Name	Phone	Type
Dickenson plc	Purchased Lisa_young@dickenson.com		Dickenson plc	(785) 241-6200	Customer - Channel

Please Note: By default, the output .CSV file includes the Salesforce Record ID field for the owner of Duplicate Leads, Duplicate Contacts, Related Leads, and Matched Accounts. To see the names of the owners of these records, you can include the owner.name field in your Matched Object Fields.

	I	J	K	L	M	
Example: Duplicate Lead	Matched Id	Duplicate Lead owner.name	Matched Acc	Matched Account	Matched Id	Matched Account owner.name
	00Q3i000002AnTUEA0	Holding Queue	FALSE			
	00Q3i000003WyDKEA0	Mike Dawson	TRUE	0013i000009S59dAAC		Mike Dawson

Selected Fields

Duplicate Contact

owner.name
✕

Duplicate Lead

owner.name
✕

Matched Account

owner.name
✕

Related Lead

owner.name
✕