LeanData Routing

Routing Metrics Mapping

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Overview

LeanData Logs are stored in a custom Salesforce object which you can use to build your own Salesforce reports. This object will capture details like the time at which a record was routed, whom the record was routed to, and the type of action that was taken. Routing Metrics Mapping allows you to populate your own fields on the Log object that will be useful in keeping track of the metrics that matter to you. This will allow you to keep track of additional relevant fields even beyond your Field History tracking limit in Salesforce.

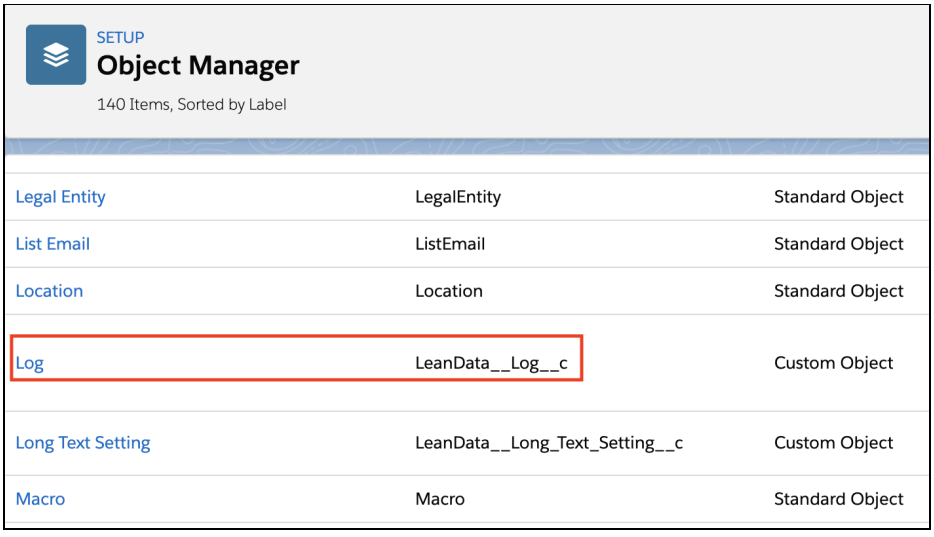
Example: *Josh is the LeanData Admin at OpenLane Software. He would like to have a Salesforce report of how many Leads with a status of Re-Qualified LeanData has routed in the past month. He creates a field on the Log object called "Lead Status when Routed" and uses the Routing Metrics Mapping feature to ensure that Lead Statuses are stamped onto this field whenever LeanData routes a Lead. Josh will now be able to build reports and dashboards in Salesforce and access this data.*

Setup

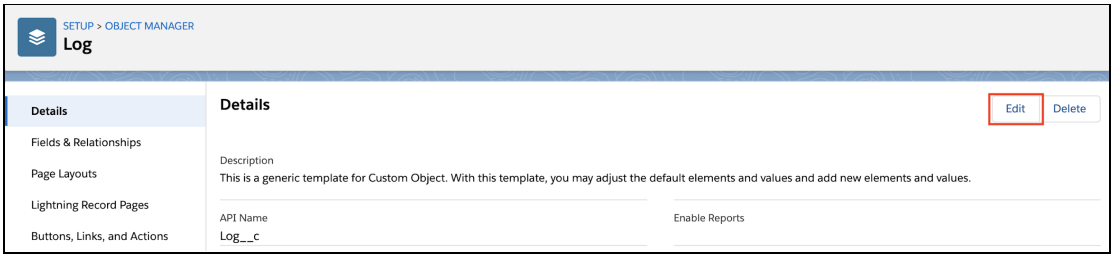
Enable Reports on the Log Object

In order to create reports with the Log Object, you will first need to ensure that you have enabled reports for this object in Salesforce.

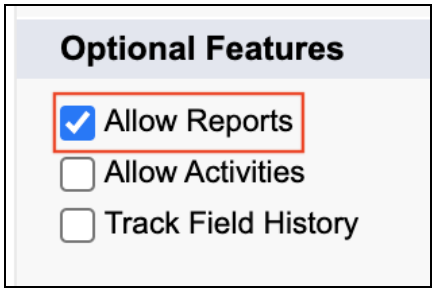
In Salesforce Setup, navigate to Object Manager, then find the Log object (LeanData__Log__c).



Once in the Log object detail page, click the **Edit** button.



On the Edit page, scroll down to the **Optional Features** section and click the **Allow Reports** checkbox.

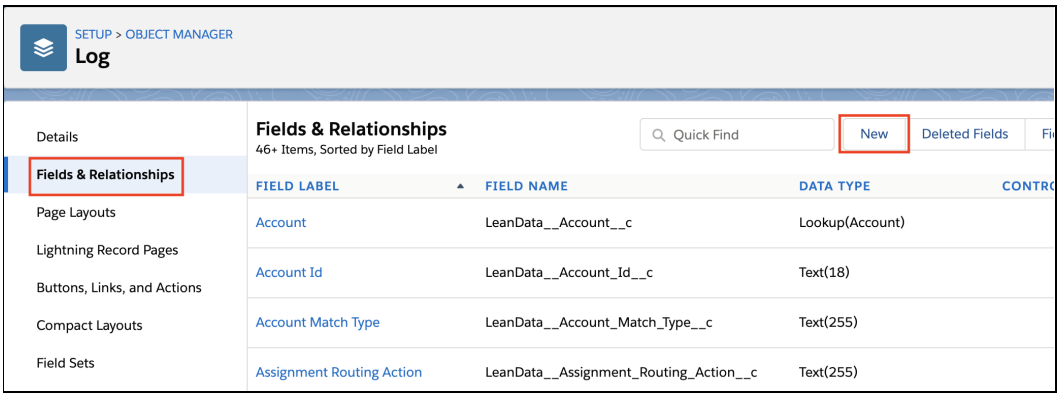


Click **Save** at the bottom of the page.

Creating Fields on the Log Object

You will have to create custom fields on the Log object to receive your mapped values.

Once you are back on the Log object detail page, select **Fields & Relationships** from the sidebar, then click **New** to create a new field.



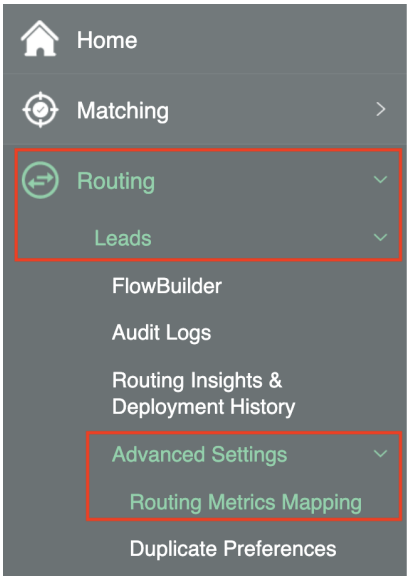
Follow the Salesforce prompts to create a new field, ensuring that you select a field type compatible with the field you later wish to map to this created field.

Repeat this process for other fields you may wish to map onto the Log object.

Mapping Fields to the Log Object

Once your intended fields have been created on the Log object, you will have to map them to corresponding fields on the routed record.

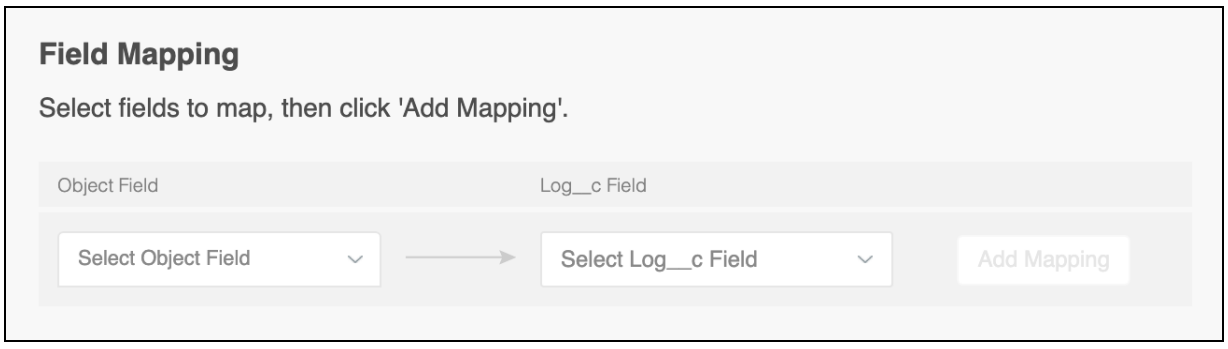
To do so, navigate to the LeanData Dashboard, then **Routing** → **Leads** (or object you are mapping from) → **Advanced Settings** → **Routing Metrics Mapping**.



On the Routing Metrics Mapping page, from the dropdown menu under **Object Field**, select the field you would like to map.

Once your source field has been selected, go to the dropdown menu on the right under **Log__c Field** and select the corresponding destination field that you created on the Log object.

Click the **Add Mapping** button.

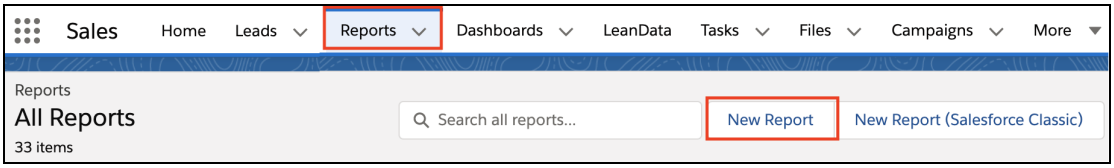


Once your Mapping has been created, future Logs will be populated with values from the corresponding object field according to the mappings defined here.

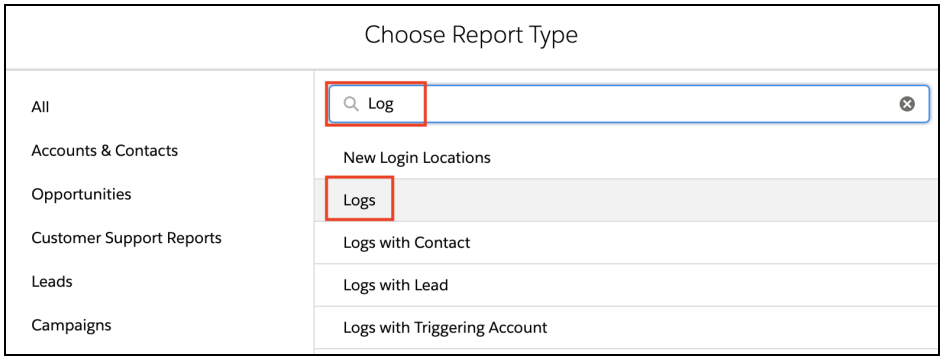
Please note: LeanData will stamp the values that exist on these at the time of routing ***prior*** to any changes made by LeanData. For example, if you have an Update Lead node that changes the Lead Status to "Working" in the graph but the record entered the graph with a Lead Status of "Not Working," the Log will capture the "Not Working" Lead Status.

Creating Reports Using the Log Object

Navigate to Salesforce Reports, and click on **New Report**.



When selecting a Report Type, search for Logs, and select **Logs** for the Report Type. If you don't see the Logs report type, please ensure you have enabled reports for this object as outlined above.



You can now create a native Salesforce report using the fields you created and mapped.