

LeanData Attribution

Marketing Touch Mapping Guide



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Overview

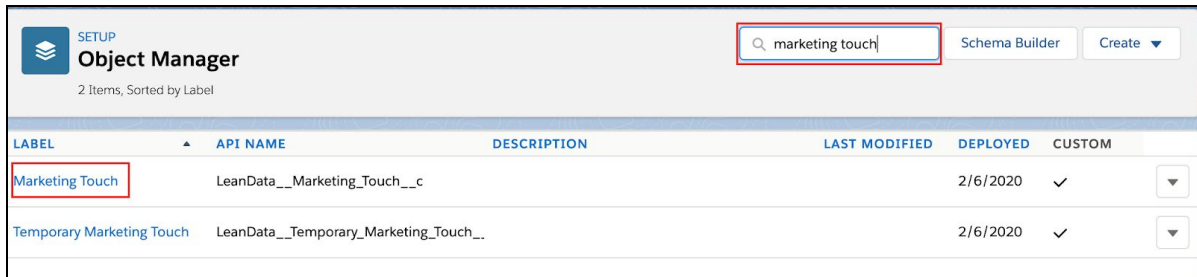
LeanData's Marketing Touch object includes certain default fields to help you report on your Attribution data. If you need to include your own custom data for reporting purposes, you can utilize Marketing Touch Mappings to add your own Campaign Member, Lead, or Contact Fields onto corresponding Marketing Touch fields.

Creating Marketing Touch Fields

Before you can set up your mappings between your custom Campaign Member, Lead, or Contact fields to Marketing Touch Fields, you must first create fields on the Marketing Touch and Temporary Marketing Touch objects to receive those custom field values.

Add Custom Fields to Marketing Touch Object

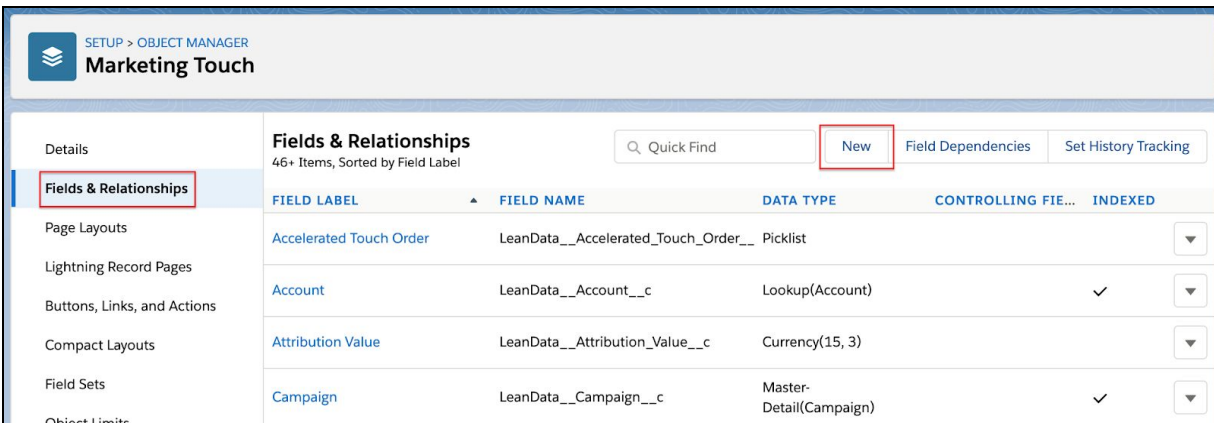
In Salesforce Setup → Object Manager, search for Marketing Touch



The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar containing the text "marketing touch". Below the search bar, there are two buttons: "Schema Builder" and "Create". The main content area displays a table with two rows of objects:

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Marketing Touch	LeanData__Marketing_Touch__c		2/6/2020	✓	
Temporary Marketing Touch	LeanData__Temporary_Marketing_Touch__c		2/6/2020	✓	

After selecting the Marketing Touch object, select the Fields & Relationships page and click the New button at the top to create your new custom Marketing Touch field.



The screenshot shows the Salesforce Fields & Relationships page for the Marketing Touch object. The left sidebar contains a navigation menu with "Fields & Relationships" selected. The main content area displays a table with the following columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIE..., and INDEXED. The table contains four rows of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Accelerated Touch Order	LeanData__Accelerated_Touch_Order__c	Picklist		
Account	LeanData__Account__c	Lookup(Account)	✓	
Attribution Value	LeanData__Attribution_Value__c	Currency(15, 3)		
Campaign	LeanData__Campaign__c	Master-Detail(Campaign)	✓	

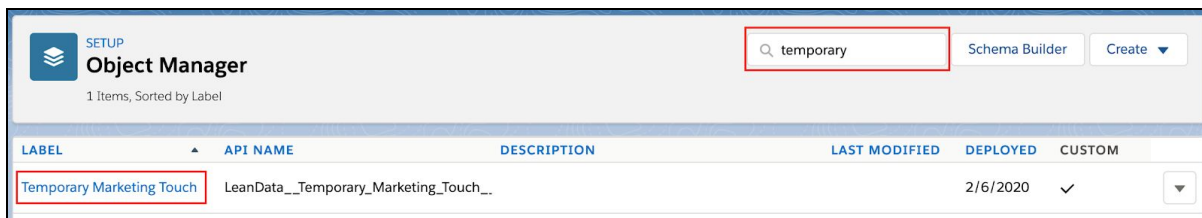
As you create your custom Marketing Touch field, please ensure you use a field type which corresponds to the field you intend to map to this new field. (i.e. DateTime → DateTime, Currency → Currency, Text → Text, etc)

Repeat for every field you wish to map.

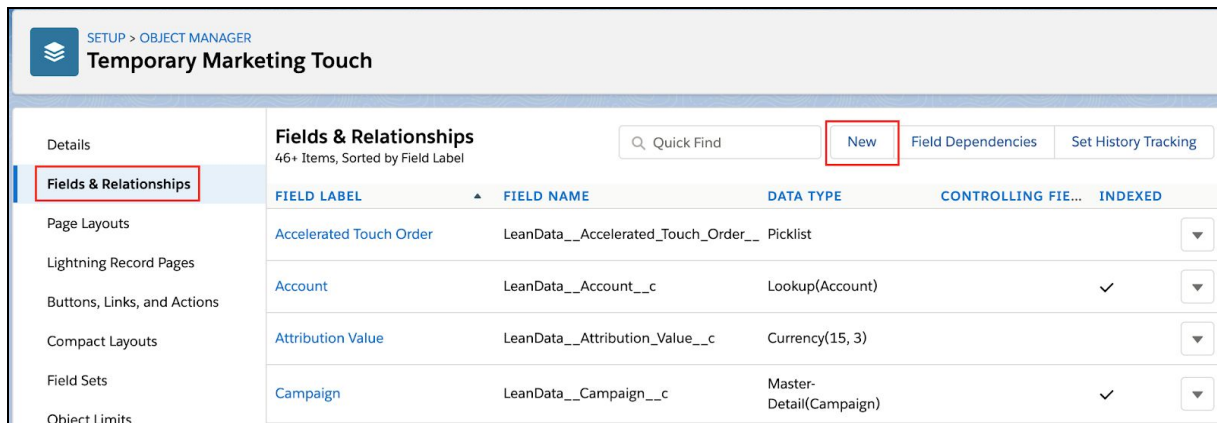
Add Custom Fields to Temporary Marketing Touch Object

For every field you created on the Marketing Touch object, you will have to create an identical field on the Temporary Marketing Touch object.

In Salesforce Setup → Object Manager, search for Temporary Marketing Touch



After selecting the Temporary Marketing Touch object, select the Fields & Relationships page and click the New button at the top to create your new custom Temporary Marketing Touch field.

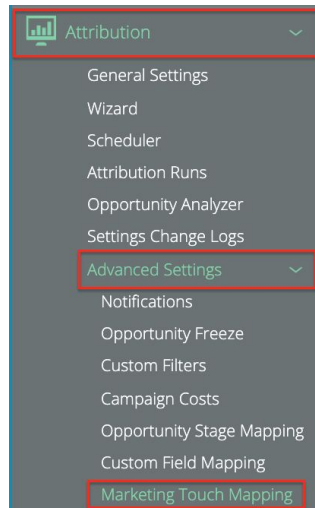


These Temporary Marketing Touch fields must have the same API name and the same type as the Marketing Touch fields you created in the previous step.

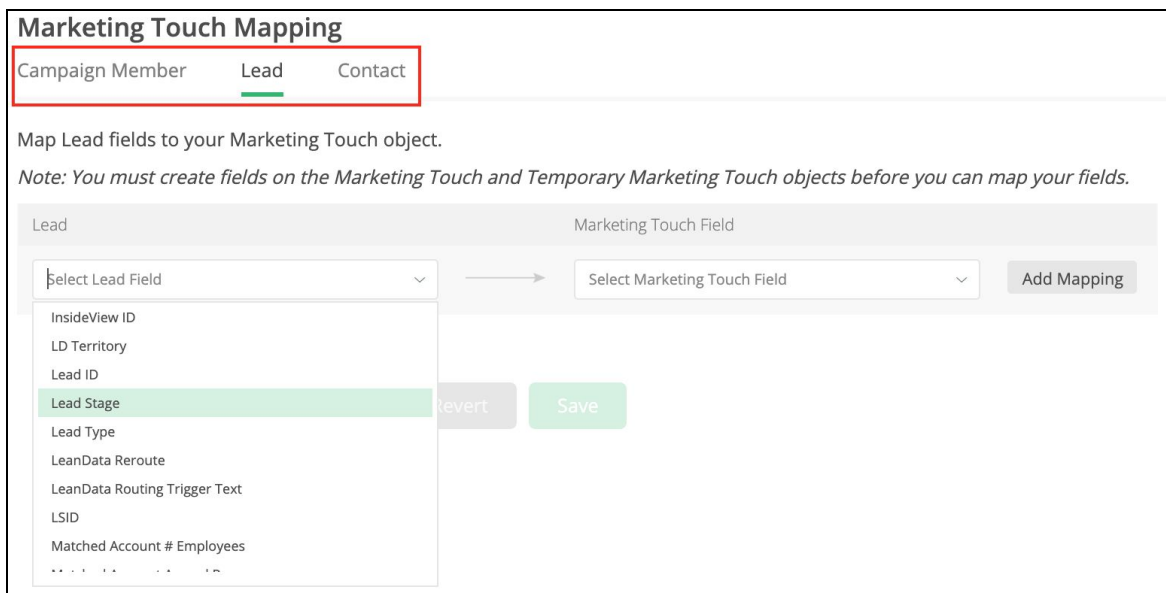
Creating Marketing Touch Mappings

Once you have created the fields on the Marketing Touch and Temporary Marketing Touch objects to receive values from your custom Campaign Member, Lead, and Contact fields, you can now set up your mappings.

Navigate to the LeanData App → Attribution → Advanced Settings → Marketing Touch Mappings.



Then select which object you would like to pull your custom field from the tabs at the top.





Select the fields you want to map onto the Marketing Touch object from the left dropdown, and select the corresponding Marketing Touch field from the right dropdown. You may create as many different mappings as you wish. Hit Save when you have finished.

Your next Attribution run will populate your custom mapped fields onto the Marketing Touch object.

For more information on other LeanData Attribution Advanced settings, please see the Attribution - Advanced Settings Guide:

<https://leandatahelp.zendesk.com/hc/en-us/articles/360022354193>