

LeanData Attribution

Wizard Guide



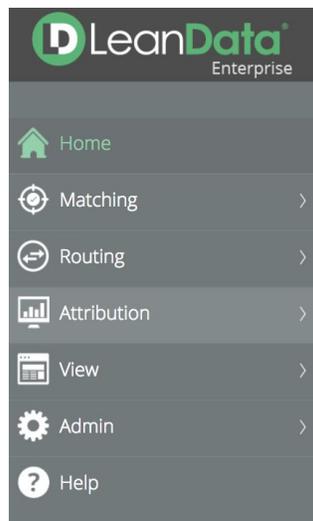
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Overview

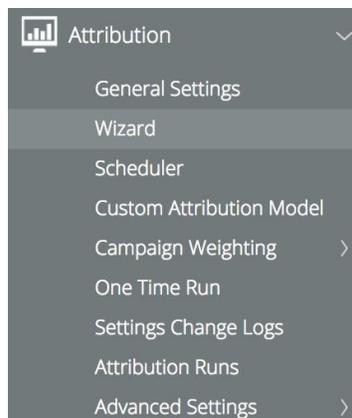
The LeanData Attribution Wizard will allow you to customize which marketing interactions are relevant in generating or influencing Opportunities. The Attribution Wizard will allow you to determine which Marketing Touches should be included or excluded when determining Campaign Attribution.

Getting Started

To get to the Attribution Wizard, navigate to the LeanData Tab and select “Attribution” from the left sidebar.

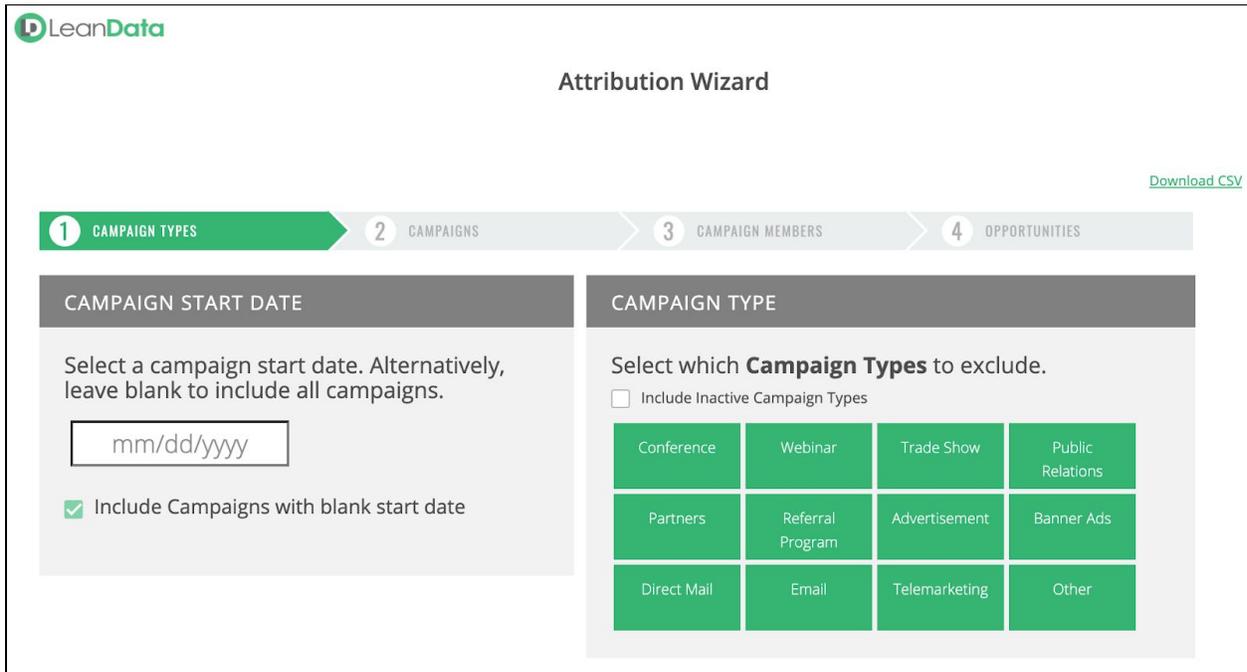


Under “Attribution,” click the “Wizard” button in the left sidebar.



After clicking “Wizard,” a new tab should open up with the Wizard Settings page where you will be able to define the data you would like to include in for Attribution.

Step 1: Campaign Criteria



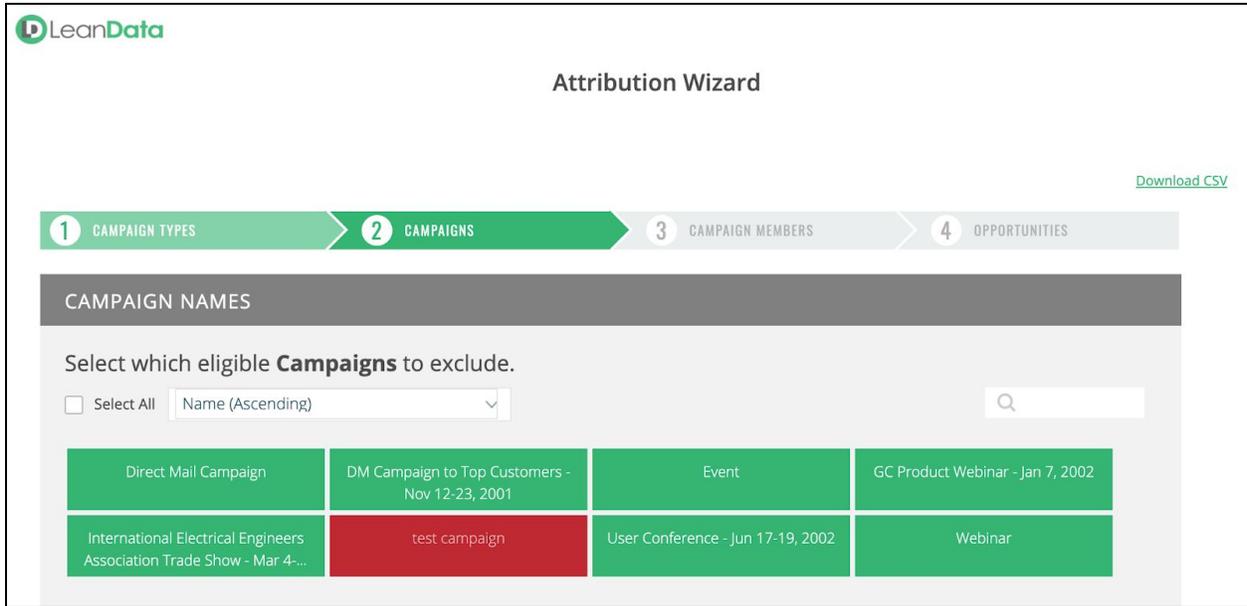
The screenshot shows the "Attribution Wizard" interface. At the top left is the LeanData logo. The title "Attribution Wizard" is centered. In the top right corner, there is a link that says "Download CSV". Below the title is a progress bar with four steps: 1. CAMPAIGN TYPES (highlighted in green), 2. CAMPAIGNS, 3. CAMPAIGN MEMBERS, and 4. OPPORTUNITIES. The main content area is divided into two columns. The left column is titled "CAMPAIGN START DATE" and contains the text "Select a campaign start date. Alternatively, leave blank to include all campaigns." Below this is a text input field with the placeholder "mm/dd/yyyy" and a checked checkbox labeled "Include Campaigns with blank start date". The right column is titled "CAMPAIGN TYPE" and contains the text "Select which Campaign Types to exclude." Below this is an unchecked checkbox labeled "Include Inactive Campaign Types" and a grid of 12 green buttons representing different campaign types: Conference, Webinar, Trade Show, Public Relations, Partners, Referral Program, Advertisement, Banner Ads, Direct Mail, Email, Telemarketing, and Other.

Determine which Campaign types should be included in the report. All active Campaigns Types are included by default, but you can select which Campaign Types to exclude from marketing attribution. (e.g. Test Campaign types, list purchase, etc).

Generally, it is best to leave “Campaign Start Date” blank unless there has been a significant shift in your business and you wish to completely exclude all Campaigns prior to a certain date.

Note: You will see an option to include Inactive Campaign Types. These Campaigns will not be included unless you select this option. After including these Campaign Types, you can also exclude specific Inactive Campaign Types individually.

Step 2: Eligible Campaigns



Attribution Wizard

[Download CSV](#)

1 CAMPAIGN TYPES → 2 CAMPAIGNS → 3 CAMPAIGN MEMBERS → 4 OPPORTUNITIES

CAMPAIGN NAMES

Select which eligible **Campaigns** to exclude.

Select All Name (Ascending)

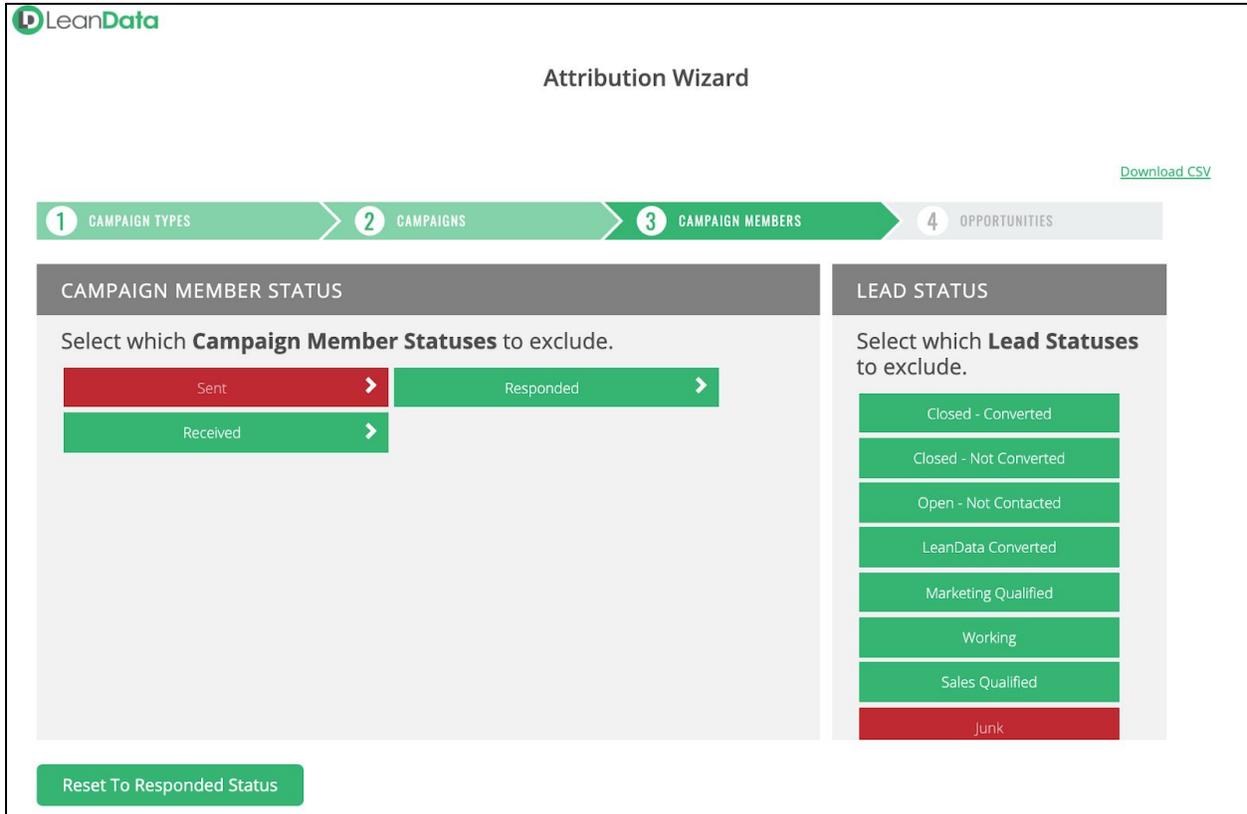
Direct Mail Campaign	DM Campaign to Top Customers - Nov 12-23, 2001	Event	GC Product Webinar - Jan 7, 2002
International Electrical Engineers Association Trade Show - Mar 4-...	test campaign	User Conference - Jun 17-19, 2002	Webinar

Determine specific Campaigns that should be in your data. This list is based on the Campaign types selected in the previous step. All Campaigns will be selected by default. You should deselect Campaigns that you wish to exclude from your reports. (e.g. Test Campaigns, etc).

You can use the search bar in the upper right to quickly find Campaigns.

Note: Campaigns missing a Campaign type will be excluded from this list.

Step 3: Filter by Campaign Member and Lead Status



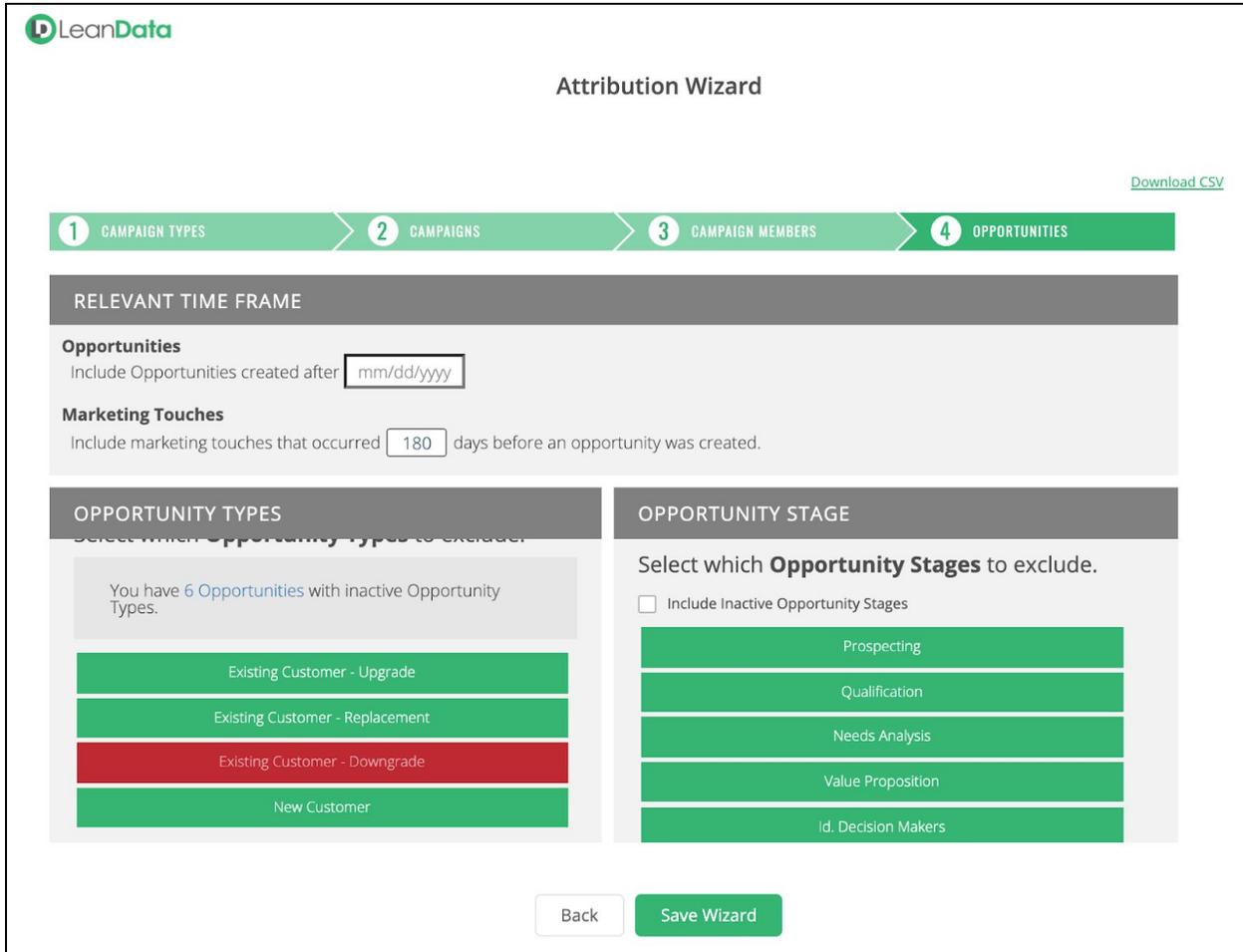
The screenshot shows the 'Attribution Wizard' interface. At the top, there is a progress bar with four steps: 1. CAMPAIGN TYPES, 2. CAMPAIGNS, 3. CAMPAIGN MEMBERS (current step), and 4. OPPORTUNITIES. A 'Download CSV' link is visible in the top right. Below the progress bar, there are two main sections: 'CAMPAIGN MEMBER STATUS' and 'LEAD STATUS'. The 'CAMPAIGN MEMBER STATUS' section has the instruction 'Select which Campaign Member Statuses to exclude.' and lists three status options: 'Sent' (red box with a white arrow), 'Responded' (green box with a white arrow), and 'Received' (green box with a white arrow). The 'LEAD STATUS' section has the instruction 'Select which Lead Statuses to exclude.' and lists eight status options: 'Closed - Converted', 'Closed - Not Converted', 'Open - Not Contacted', 'LeanData Converted', 'Marketing Qualified', 'Working', 'Sales Qualified', and 'Junk' (red box). At the bottom left of the wizard, there is a green button labeled 'Reset To Responded Status'.

Determine which relevant Campaign Member & Lead statuses to be included in your Attribution data set. Exclude statuses which don't represent the Campaign Member taking action or that you don't want to be given marketing attribution credit (e.g. Sent, Declined, Registration Error, Opened Email etc.)

You can selectively use Campaign Member Statuses for individual Campaign Types. If you click on the white arrow by each Campaign Member status, a box containing all the Campaign Types that use that particular Status will appear, and you can select/deselect whether to include that status depending on the Campaign Type.

If you utilize the "Responded" checkbox field on your Campaign Members and would like LeanData to simply use Campaign Members that are marked with that "Responded" field instead of picking each individual status. You can click the "Reset to Responded Status" button at the bottom.

Step 4: Filter Opportunities



Attribution Wizard

[Download CSV](#)

1 CAMPAIGN TYPES > 2 CAMPAIGNS > 3 CAMPAIGN MEMBERS > 4 OPPORTUNITIES

RELEVANT TIME FRAME

Opportunities
Include Opportunities created after

Marketing Touches
Include marketing touches that occurred days before an opportunity was created.

OPPORTUNITY TYPES
Select which **Opportunity Types** to exclude.

You have 6 Opportunities with inactive Opportunity Types.

- Existing Customer - Upgrade
- Existing Customer - Replacement
- Existing Customer - Downgrade
- New Customer

OPPORTUNITY STAGE
Select which **Opportunity Stages** to exclude.

Include Inactive Opportunity Stages

- Prospecting
- Qualification
- Needs Analysis
- Value Proposition
- Id. Decision Makers

Relevant Time Frame allows you to filter out Opportunities created before a certain date. This can greatly speed up your Attribution batches as it will only consider Opportunities created after the specified date.

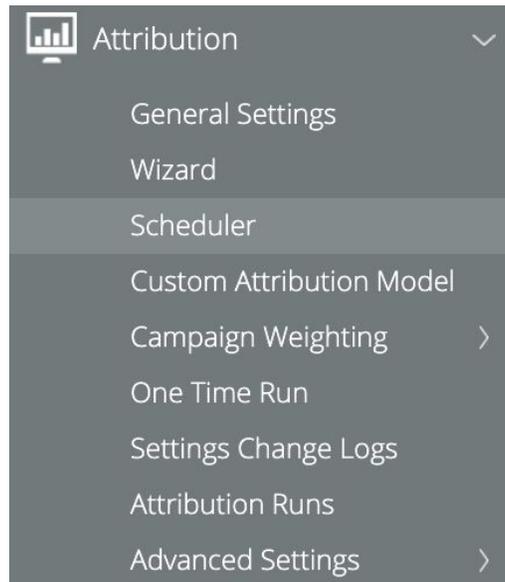
You can also determine the length of time before an Opportunity is created in which Marketing Touches can be eligible to receive Campaign attribution. By default, this time frame is set at 180 days; however, depending on the length and complexity of your organization's sales cycles, you may choose to have a broader or narrower time frame. Only Campaign touches that occur in the relevant time window will qualify for attribution credit. For example, a Campaign interaction that happened 5 years ago is likely not influencing an Opportunity that was just created this quarter.

Exclude Opportunity types and stages that you do not wish to include in your report.

Step 5: Schedule Run

Click "Save Wizard" and go back to the LeanData tab in order to Schedule a run. This will update data for your Campaigns, Opportunities and Campaign Member touches.

Under “Attribution,” you will find a selection titled “Scheduler.”



After clicking Scheduler, set the frequency at which you would like to run LeanData Attribution. As a best practice, schedule a weekly run, ideally with enough time to review the data before the report is needed. One recommendation is to run the report Sunday evenings as this will take advantage of optimal SFDC platform performance.

Scheduler

Set when the Attribution batch job should run to update data and the user it will run as.

Scheduler

Schedule when Attribution data will be updated. The recommendation is to run the Attribution batch weekly over the weekends when Salesforce system loads are generally reduced.

Frequency on Time

Running User

Set the Attribution batch job running user. Note a user can only set themselves to be the running user.

Current Running User: No existing Running User



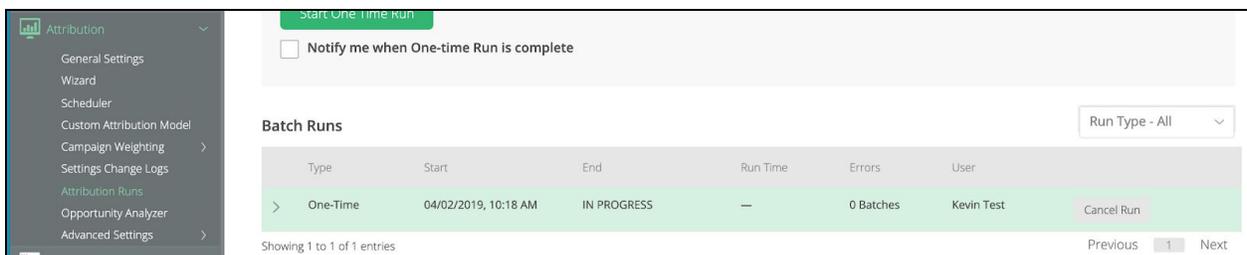
You can also change the User of record to yourself on this page by clicking the “Change Running User To Me” button. You will need to have LeanData’s Marketing Touch Permission Set to be the Running User.

Note: When LeanData’s Attribution batch runs, it first deletes all existing data and then recalculates each metric utilized. While LeanData is recalculating your data, any use of the data will provide incomplete results. Please wait until it has completed running to utilize the results.

Monitoring Progress

Attribution Runs Page

The easiest way to check on the overall progress of your Attribution Run is to Navigate to the “Attribution Runs” page in LeanData.



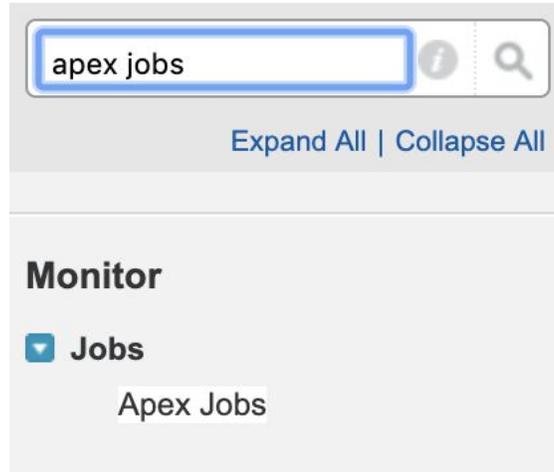
Type	Start	End	Run Time	Errors	User	
> One-Time	04/02/2019, 10:18 AM	IN PROGRESS	—	0 Batches	Kevin Test	Cancel Run

This will show you previous runs as well as any currently running batches.

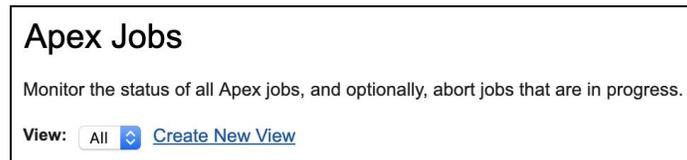
Salesforce Apex Jobs Page

Alternatively, you can check on the status of your attribution jobs by checking your Apex Jobs directly in Salesforce.

You can create a view to easily monitor the progress of your LeanData jobs. Go into “Set Up” and in the Quick Find Bar search for “Apex Jobs.”



Click on “Create New View” to view the LeanData Attribution Jobs.



Enter “LeanData Attribution” in View Name. Select “Apex Class” in Field, “Contains” in Operator, and “Reporting_” in Value. Include the following fields to display:

- Submitted Date
- Job Type
- Status
- Status Detail
- Total Batches
- Failures
- Submitted BY
- Completion Date
- Apex Class
- Apex Method
- Apex Job ID

Step 1. Enter View Name

View Name:

View Unique Name: i

Step 2. Specify Filter Criteria

Filter By Additional Fields (Optional):

Field	Operator	Value	
<input type="text" value="Apex Class"/>	<input type="text" value="contains"/>	<input type="text" value="Reporting_"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text"/>	AND

[Add Filter Logic...](#)

Step 3. Select Fields to Display

Available Fields		Selected Fields
Parent Job Last Processed ID Last Processed Offset	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	Submitted Date Job Type Status Status Detail Total Batches Batches Processed Failures Submitted By Completion Date Apex Class Apex Method Apex Job ID
		Top <input type="button" value="⬆"/> Up <input type="button" value="⬆"/> Down <input type="button" value="⬇"/> Bottom