LeanData Matching

Troubleshooting Guide

Overview 3

Tagging Preview 3

Tiebreakers and Filters 5

Tiebreaker Rules 5

Taggings Settings 5

Tagging in Match Nodes 6

Filters 7

Audit Logs 7

Domain Matching 9

Preserved Manual Updates 10

Incorrectly Converted Leads 10

Summary 10

© 2020 LeanData Inc. All rights reserved. LeanData is a registered trademark.

Overview

In a complex system like LeanData, with automation and many configuration options, it is possible to have Leads matched to the wrong Account based on configuration options. The most common question LeanData Admins get around matching is “why did I get this Lead?” There are a number of different reasons for why Leads could be matching into the wrong Account. This guide will provide details on how to troubleshoot matching issues.

Here are areas to check when troubleshooting Lead matches:

- Check the Lead in Tagging Preview
- Check your tie-breaker rules
- Check for filters affecting the matching
- Check the Audit Logs
- Check to see if Domain Matching has been turned on
- Check for previous Leads that matched to the Account

Tagging Preview

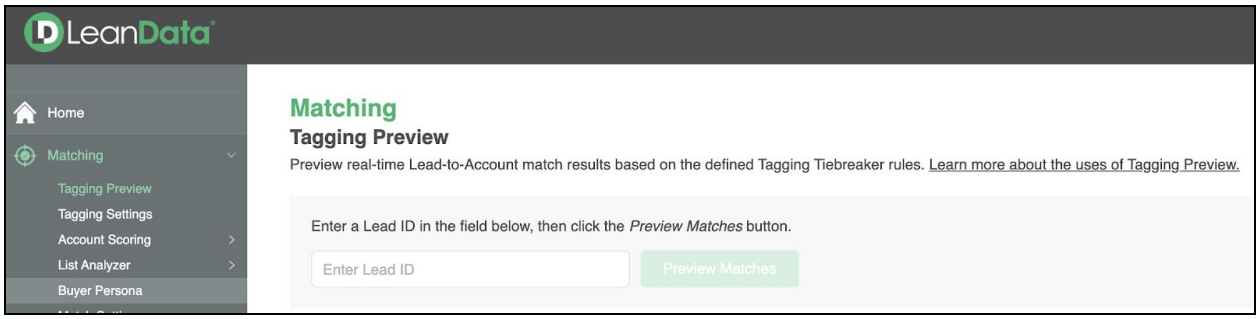
Tagging Preview will run a real time match to check which Account a Lead would be tagged with if Tagging were run right now. It will additionally show you which Accounts (if there are 2 or more) were potential matches and which Accounts were filtered out. It will also show which tie-breakers impacted the selection of the best matched Account.

Before accessing Tagging Preview, you will need the Salesforce ID of the Lead. This ID can be found in the Url of the Lead Record, as a 15 or 18 character string at the end of the url.

You will need to copy this ID, so it can be pasted into the Tagging Preview feature.

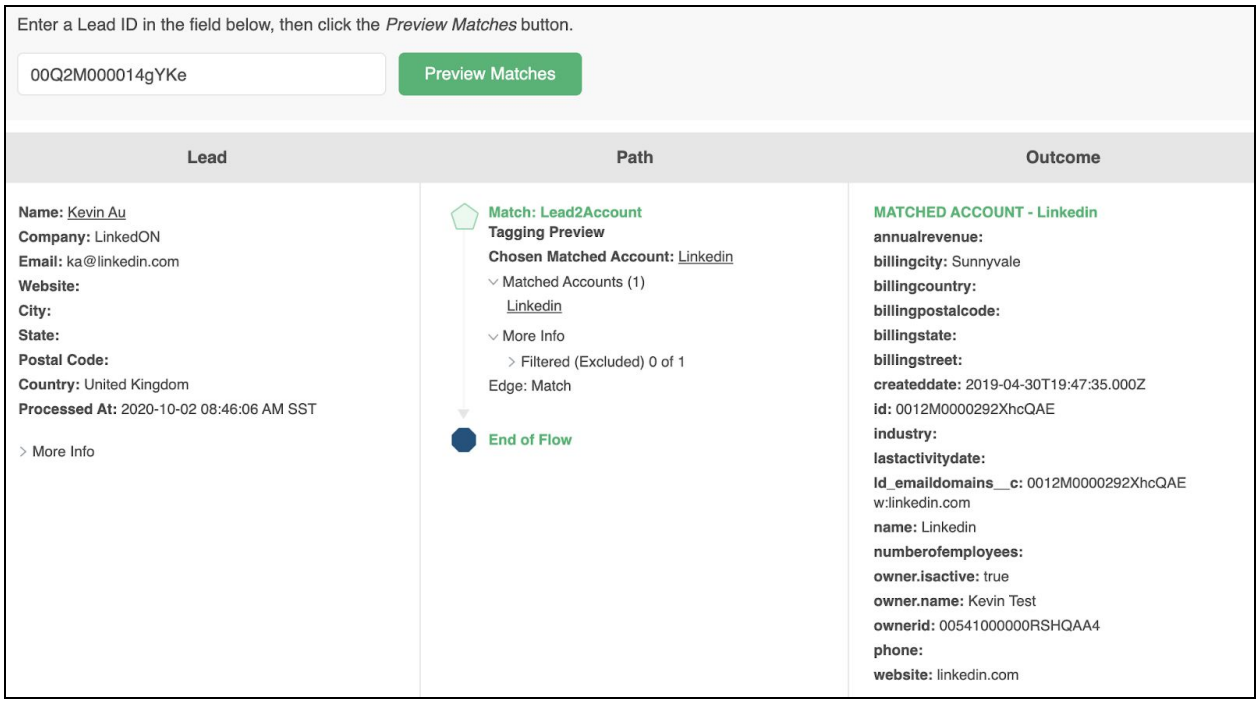
To access the Tagging Preview feature:

1. Open the LeanData Admin tab.
2. Click on Matching to expand the menu.
3. Click on Tagging Preview.



To use Tagging Preview:

1. Paste the copied Lead ID into the field provided.
2. Click Preview Matches.The screen will reload with the audit information.



When the preview has run, you will see the results at the bottom of the page. The preview will show you the following:

- The Lead that was previewed.
- Any potential matched Accounts.
- The factors that filtered out or deprioritized matched Accounts.
- The Outcome of which Account is currently the best match.

Please Note: Tagging Preview shows how the Lead would be matched if the matching occurred at the current time. It will not show any historical match information. Any discrepancies usually means that your matching settings were changed sometime after the Lead was last tagged.

Tiebreakers and Filters

Tiebreakers and Filters, used when matching Leads to Accounts, can affect how matching can work. Filters control which Accounts are used for matching. Tiebreaker rules affect matching when there are more than one potential Account matches. Tiebreakers pick the best match based on your needs.

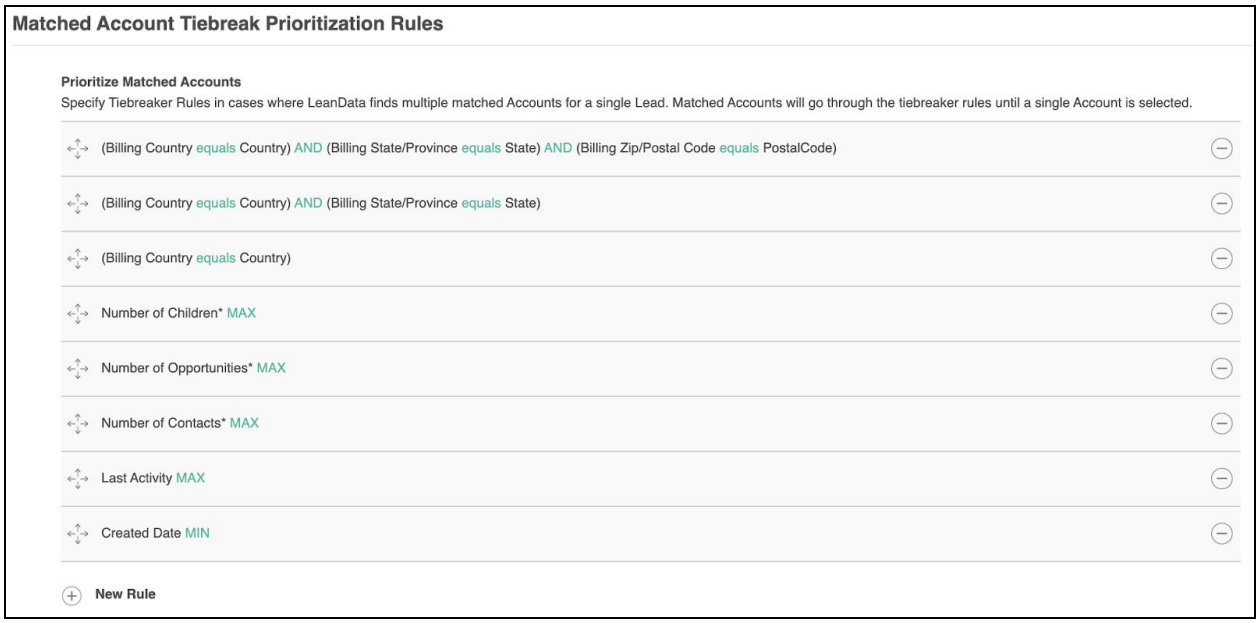
Tiebreaker Rules

You may run into situations where your Lead matches against multiple matched Accounts but routes into the wrong Account due to your Tiebreaker rules. Tiebreakers are found on the Tagging Settings page and in Match Nodes in LeanData Router.

Taggings Settings

To view your Tiebreakers Rules:

1. Open the LeanData Admin tab, as needed.
2. Click on Matching to expand the menu.
3. Click on Tagging Settings. The Tagging Settings page will be displayed. Any Tiebreaker rule settings will be displayed under the heading, Matched Account Tiebreaker Prioritization Rules.



In this section you can check to see if your tiebreakers have been modified in any way that would affect your matching.

For more information on managing your tiebreakers, please refer to the Matching Tagging Overview Guide: https://leandatahelp.zendesk.com/hc/en-us/articles/360016337754-Matching-Tagging-Overview-Guide

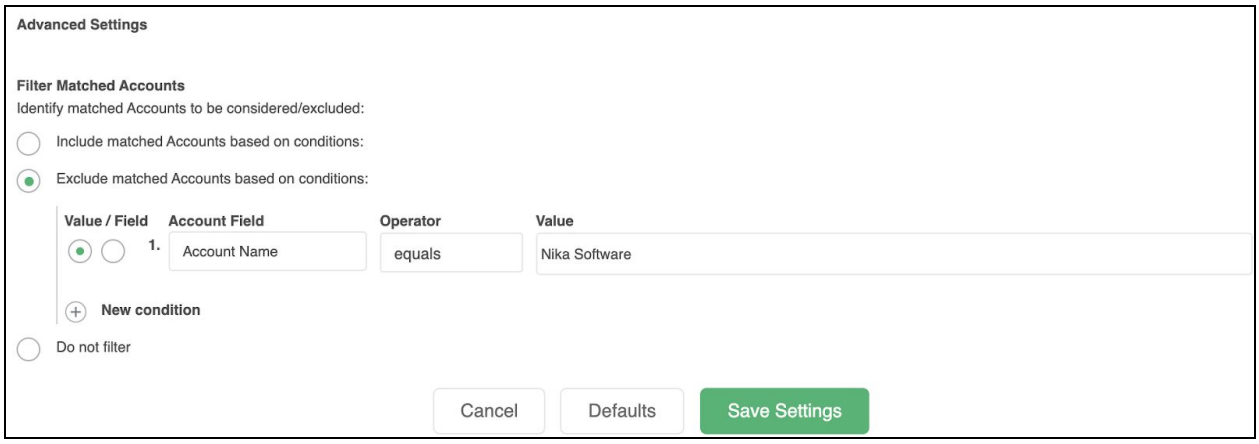
Please Note: Tagging tiebreakers only affect matching if there are multiple potential matched Accounts after the Tagging filters are processed.

Tagging in Match Nodes

Each of the Match Nodes in a LeanData Router Graph includes Tagging Tiebreakers. These Tiebreakers are set for each match node. We will discuss the Router Graphs later in this document.

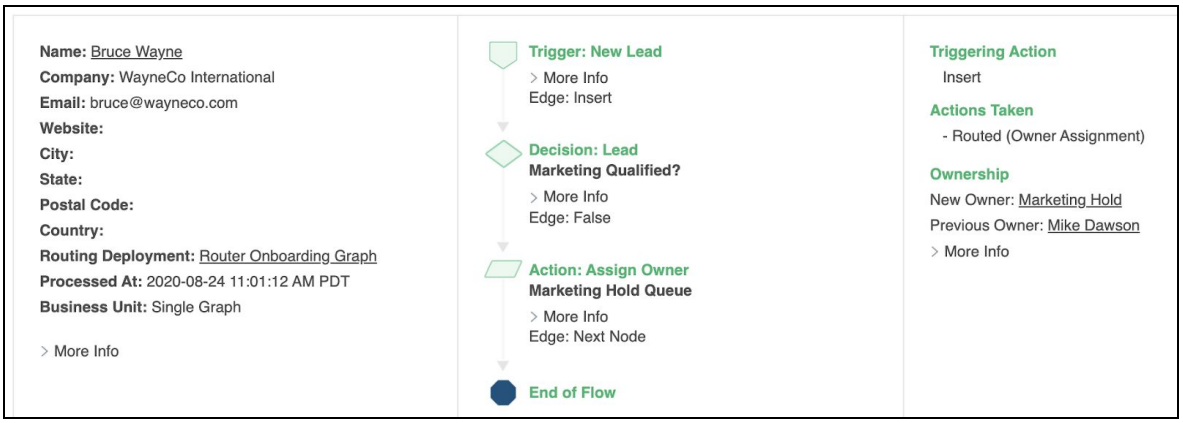
Filters

Filters can be found on the Tagging Settings page under Advanced Options and in LeadData Router like Tiebreakers. If you are excluding certain Accounts with filters, it's possible that the next closest match is what your Lead is routing to. Filters are commonly used to ignore things such as Accounts owned by certain individuals.



Audit Logs

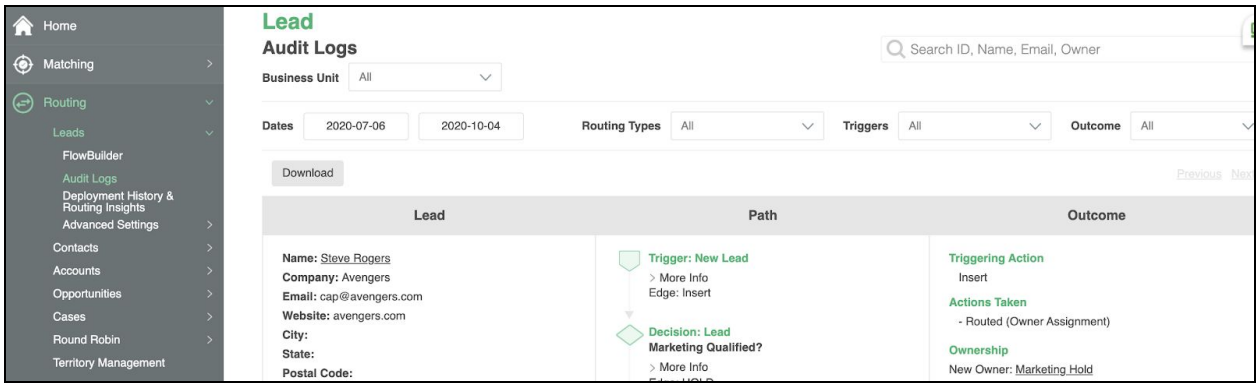
If the mismatch happened in Lead Router, Audit Logs provide a visual representation of the journey a specific Lead took from start to finish. It's possible that the routing logic is set up so your Leads are routing to the unintended Accounts. You can/will need to adjust the logic in your Flowbuilder graph (you cannot adjust it in Audit Logs).



Please Note: Audit Logs are stored for 90 day by default. Please contact us to discuss changing this, if needed.

To access your Audit Logs:

1. Open the LeanData Admin tab, as needed.
2. Click on Routing to expand the menu.
3. Click on Audit Logs.



On the Audit Log screen you will see the most recently routed records. The Audit Logs have multiple settings for searching for the exact record you need to research including:

- Business Unit
- Dates
- Routing Types
- Triggers
- Outcome
- Open search
    - Id
    - Name
    - Email
    - Owner

The Audit Logs display the record in three columns: Lead, Path, and Outcome. The columns together provide you with the information to track the routing of the record.

- **Lead Column** - Provides you with the information on the Lead at the time it was routed.
- **Path Column** - Provides the Router flow path that the Lead took to be routed. Includes details of each router node encountered and any decisions encountered.
- **Outcome Column** - Provides the outcome of the routing including the ownership of the record before and after routing.

Audit Logs will show you all the potential matches. By clicking “Matched Accounts” you will see all of the Potential Matched Accounts identified by the LeanData Fuzzy Matching Algorithm.

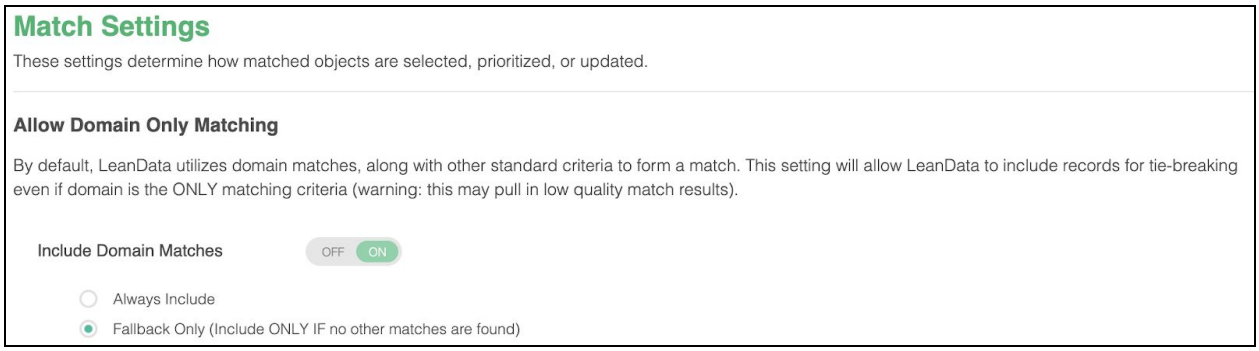
By clicking “More Info”, you will be able to see exactly which filters and tiebreakers were relevant in selecting the best matched Account.

For more information on working with the Audit Logs, please refer to the Audit Logs Guide: https://leandatahelp.zendesk.com/hc/en-us/articles/360005472793-Routing-Audit-Logs-Guide

Domain Matching

Domain Matching is a setting to allow matches based solely on Domains like email addresses or websites. There are 2 options for Domain Matching:

- Always Include
- Fallback Only (Include ONLY IF no other matches are found)



LeanData, does not typically recommend having this option set to **Always Include**. Having this set can cause separate Accounts with similar email addresses (wm.leandata.edu and chs.leandata.edu as an example) to match incorrectly since we are matching purely off of email domain when this setting is on. Leads and Accounts that may accidentally have an incorrect domain will also match without other supporting criteria.

To check domain matching settings:

1. Open the LeanData Admin tab.
2. Click on Matching to expand the menu.
3. Click on Match Settings.

If you want to use Domain Matching, we recommend setting the option for Fallback Only (Include ONLY IF no other matches are found) instead of Always Include.

Preserved Manual Updates

LeanData has a setting which allows you to preserve manual updates to the Reporting Matched Account fields. If this setting is enabled, and someone manually updates the Reporting Matched Account field, LeanData will preserve that manually entered value, even if the algorithm might find a different match. If you have a Lead that is tagged with an Account and you believe it may not be the best match, check to see if you have this setting enabled.

Incorrectly Converted Leads

Unintended associations happen when Leads are converted into a Contact under the incorrect Account. This may associate an incorrect domain with that Account which may be used for future matches. In this case, you'll want to disassociate those incorrect Contacts from the wrong Account and re-match your Leads. Audit Logs will help to determine if this is the case.

Summary

While there are a number of reasons why a record would have an issue with matching, LeanData provides powerful tools for troubleshooting matching.