

# LeanData Matching

Tagging Logs



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## Overview

The Tagging Logs feature will allow LeanData Admins to review the results of LeanData Tagging and understand why certain Accounts were matched or not matched. This includes understanding which Accounts may have been filtered or prioritized due to specific Tagging filters or tiebreakers. This allows admins to easily review Tagging logic and make corresponding adjustments to customize Tagging for their organization.

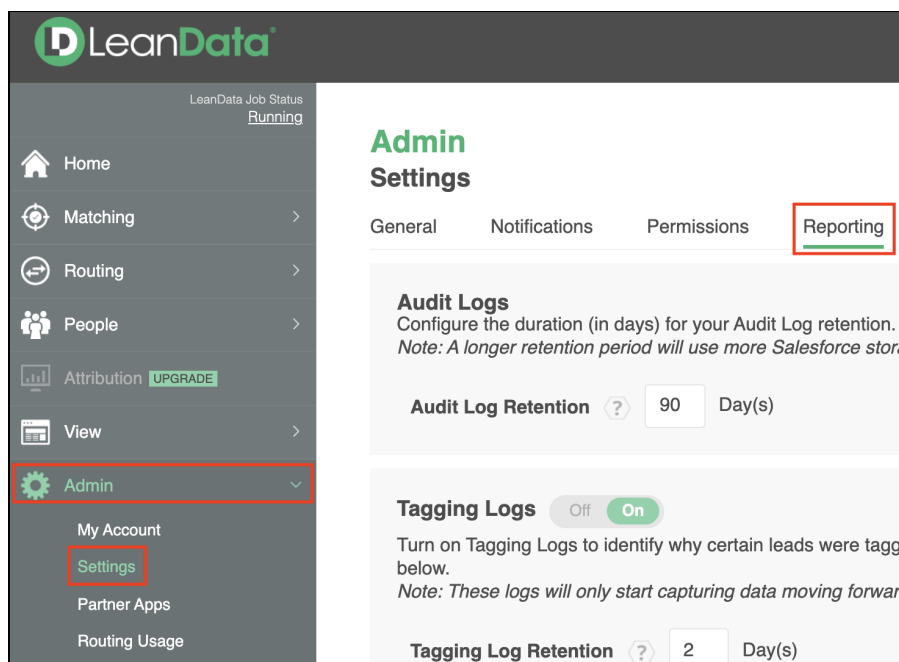
The Tagging Logs will also enable admins to identify any records with Tagging failures for troubleshooting purposes.

**Example:** Ben is the LeanData Admin at MetricSilo Inc. A sales rep shows him a Lead that should have matched to a particular Account, but LeanData has not tagged it. Ben uses the Tagging Logs feature to download the past week's Tagging Logs and discovers there is an old validation rule that prevented the tagging. He goes into his Salesforce settings to update the validation rule.

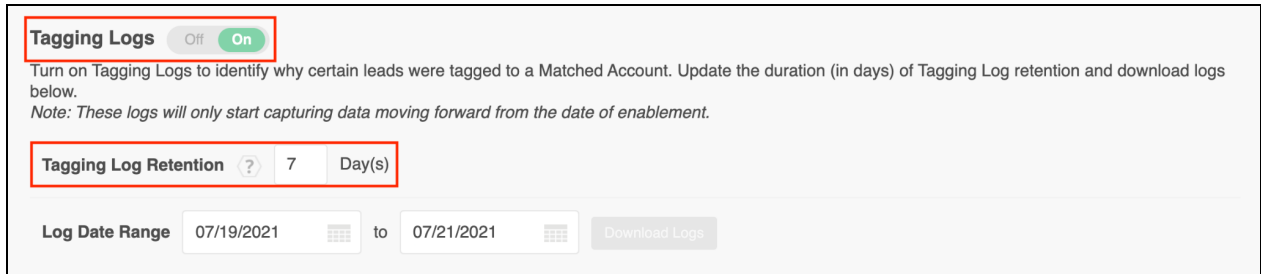
## Enabling Tagging Logs

Tagging Logs are turned off by default, so must be enabled before they will begin to capture data. Tagging Logs will capture data moving forward from the date of enablement, and will not retroactively include any Logs prior the date of enablement.

To enable Tagging Logs, Navigate to the LeanData app, then **Admin > Settings > Reporting**.



On the **Reporting** tab on the **Admin Settings** page, toggle the **Tagging Logs** feature to On.



The screenshot shows the 'Tagging Logs' section in the Admin Settings. At the top, there is a toggle switch for 'Tagging Logs' which is currently set to 'On'. Below this, there is a text description: 'Turn on Tagging Logs to identify why certain leads were tagged to a Matched Account. Update the duration (in days) of Tagging Log retention and download logs below. Note: These logs will only start capturing data moving forward from the date of enablement.' Underneath the text, there is a 'Tagging Log Retention' field set to '7' with a unit dropdown menu set to 'Day(s)'. At the bottom, there is a 'Log Date Range' section with two date pickers: the first is set to '07/19/2021' and the second to '07/21/2021', with a 'Download Logs' button to the right.

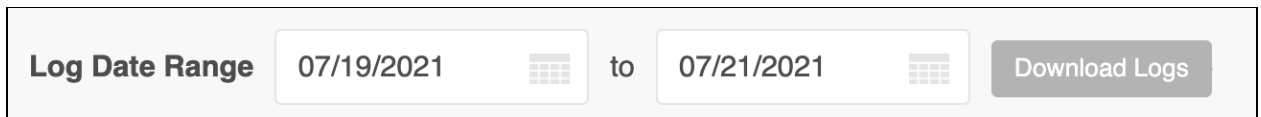
In the **Tagging Log Retention** setting, define the length of time that LeanData will keep Tagging Logs. Setting a longer retention time will ensure that Logs are kept longer before being discarded.

**Note:** LeanData Tagging Logs are stored in your Salesforce instance in the object `Tagging_log__c` and will count against any storage limits you have, so please keep that in mind when deciding how long to keep your Tagging Logs.

## Downloading Tagging Logs

To download Tagging Logs, from the LeanData app, navigate to **Matching** → **Tagging Settings**.

In the **Tagging Logs** section, set a date range from which you would like to download logs using the **Log Date Range** setting. You will only be able to download logs that were generated within the **Tagging Log Retention** time frame.



The screenshot shows the 'Log Date Range' section in the Tagging Settings. It features two date pickers: the first is set to '07/19/2021' and the second to '07/21/2021', with a 'Download Logs' button to the right.

Once you have defined your Log Date Range, click the Download Logs button and you will be able to save a CSV file containing Tagging Logs from that date range.

## Tagging Logs CSV & Fields

The CSV file you download will contain one row for each Tagging log that was processed during the date range you specified. It will contain columns showing the Lead information, Matched Account information, the relevant filters and tiebreakers as well as the Tagging outcome, triggers, and error details.

### Lead Fields Section

Lead Fields												
Id	Name	Street	City	State	PostalCode	Country	Email	Website	Phone	Company	Filters	Tiebreakers
00Q2M0000	Luke smith	61 Golf St.	Reidsville	NC	27320	United State	Luke.smith	Luke.smith@	(800) 625-54	Bombay Corr	{}	{Country=nu
00Q2M0000	Bobby Au	331 Galvin A	Mason	OH	45040	United State	Bobby.Au	Bobby.Au@s	(700) 692-02	Bombay Corr	{}	{Country=nu
00Q2M0000	Bora Wong	454 Illinois S	Greenville	NC	27834	United State	Bora.Wong	Bora.Wong@	(860) 918-30	Bombay Corr	{}	{Country=nu
00Q2M0000	Arthur Smith	78 Gulf Drive	Hobart	IN	46342	United State	Arthur.Smith	Arthur.Smith	(278) 628-86	Bonanza Pro	{}	{Country=nu
00Q2M0000	Bradley Boxe	7 East Lake F	Elkhart	IN	46514	United State	Bradley.Boxe	Bradley.Boxe	(692) 749-95	Midwest TV	{}	{Country=nu
00Q2M0000	Anja Cotton	8895 Addisoi	Bedford	OH	44146	United State	Anja.Cotton	Anja.Cotton@	(472) 965-35	Midwest TV	{}	{Country=nu
00Q2M0000	Cora Glimps	8345 Sherme	North Tonaw	NY	14120	United State	Cora.Glimps	Cora.Glimps	(587) 945-73	Mighty Case	{}	{Country=nu

- Lead ID
- Name
- Street
- City
- State
- Postal Code
- Country
- Email
- Website
- Phone
- Company
- Filters
- Tiebreaker Field Values
  - Displays all Tiebreaker field values for the Lead

### Account Fields Section

Account Field										
Id	Name	BillingStreet	BillingCity	BillingState	BillingPosta	BillingCount	Website	Phone	Filters	Tiebreakers
0012M0000	Bombay Corr	61 Golf St.	Reidsville	NC	27320	United State	BombayCom	(800) 625-54	{}	{#children=C
0012M0000	Bombay Corr	331 Galvin A	Mason	OH	45040	United State	BombayCom	(700) 692-02	{}	{#children=C
0012M0000	Bombay Corr	454 Illinois S	Greenville	NC	27834	United State	BombayCom	(860) 918-30	{}	{#children=C
001410000	Bonanza Pro	78 Gulf Drive	Hobart	IN	46342	United State	BonanzaProc	(278) 628-86	{}	{#children=C
001410000	Midwest TV	7 East Lake F	Elkhart	IN	46514	United State	MidwestTV&	(692) 749-95	{}	{#children=C

- Account ID
- Name
- Billing Street
- Billing City
- Billing State
- Billing Postal Code
- Billing Country
- Website
- Phone
- Filters
- Tiebreaker Field Values
  - Displays all Tiebreaker field values for the Account

### Filters & Tiebreakers / Tagging Outcomes

Filter & Tieb		Tagging Outcome			
Filter Rules	Tiebreaker F	Date	Outcome	Error Details	Tagging Trigger
	[{"rpnLogic"	3/26/21 11:23	Tagged		insert
	[{"rpnLogic"	3/26/21 11:26	Tagged		insert
	[{"rpnLogic"	3/26/21 12:07	Tagged		insert
	[{"rpnLogic"	3/26/21 12:21	Tagged		insert
	[{"rpnLogic"	3/26/21 12:34	Tagged		insert

### Filters & Tiebreakers section

- Filter Rules
- Tiebreaker Rules
  - Displays the customer configured Filters & Tiebreaker Rules

### Tagging Outcome section

- Date
- Outcome
  - Tagged
  - Untagged
  - No Action
  - Error
- Error Details
- Tagging Trigger
  - One-Time Tagging Job
  - Insert
  - Update
  - Matched Account Update