

LeanData Attribution

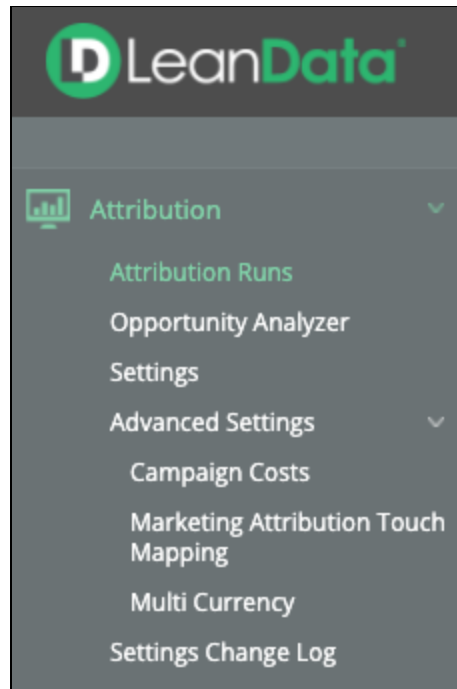
Settings Guide 3.0



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Overview

The purpose of this document is to provide LeanData's attribution customers with a guide on configuring and using the various settings available to them. Attribution 3.0 is part of the LeanData Analytics App. You will need to download the LeanData Analytics App from the App Exchange before using this guide. To access Attribution, you will need to access the LeanData Analytics Tab instead of the standard LeanData App.



Attribution Runs

The Attribution runs section gives you visibility and control over when your Attribution Runs process as well as details as to how they are performing. Each time an attribution run takes place, LeanData is deleting the entire attribution data set and recalculating everything all over again (unless Opportunity Freeze is enabled).

Attribution

Attribution Runs

[Schedule Runs](#)[Run History](#)[Notifications](#)

One-Time Run

Starting a One-Time Run will kick off a new Attribution calculation. This calculation will modify your Marketing Attribution Touch object values.

[Start One-Time Run](#)

Scheduled Run

Schedule the frequency in which your Attribution data will be updated.

Recommended: Schedule a **weekly** run, during the weekend (when Salesforce system loads are generally reduced).

Frequency

Weekly

Day

Saturday

Time

Select Time

AM

Running User ?

View/change the Attribution Batch Job owner.

Current Running User: Timothy Tran

[Change Running User To Me](#)

Schedule Runs

The Schedule Runs screen gives you the tools needed to create your runs. There are settings for One-Time Runs, Scheduled Runs and the Running User.

One-Time Run

Starting a one-time run kicks off your attribution run on demand. This is useful when you would like to run attribution but do not want to wait for the next scheduled run. A One-Time run is best used when you change your attribution settings and would like to refresh the data to your new settings. In this case, you can launch the one-time run immediately to see how your changes affected the run, as opposed to waiting for the next scheduled run.

Scheduled Run

These are runs that kick off on a schedule you set. If your runs are under 8 hours long, you can typically have a daily run starting at 11 PM or midnight so that they run overnight. If you have a busier APEX queue, (lots of tools running in your SFDC) and your runs are longer, a better practice may be to run Attribution over the weekend when Salesforce activity is not as frequent.

Running User

This is the user of record on the Attribution runs. This user will need full access to all SFDC objects related to Attribution (Lead, Contact, Campaign, Campaign Member, Opportunity, Account, Task, and Event), as well as the permission set titled LeanData Analytics Read/Write. When saving your scheduled runs, the user you are logged in as, when saving will automatically be set as the running user. You can also login as a user and click “Change Running User To Me” in order to change it to that user.

Run History

Run history shows details on how your Attribution Runs are performing. If there are any errors on your runs, you can hover over the row with errors and click view errors on the right side to get the details of those errors.

Attribution

Attribution Runs

Schedule Runs

Run History

Notifications

Run Type: All

Type	Start	End	Run Time	Errors	User
> Scheduled	07/24/2021 (12:00AM)	07/24/2021 (12:05AM)	5m	0 Batches	T. Tran
> Scheduled	07/17/2021 (12:00AM)	07/17/2021 (12:05AM)	5m	0 Batches	T. Tran
> Scheduled	07/10/2021 (12:00AM)	07/10/2021 (12:05AM)	5m	0 Batches	T. Tran
> Scheduled	07/03/2021 (12:00AM)	07/03/2021 (12:05AM)	5m	0 Batches	T. Tran

Notifications

The Notifications screen gives you tools to set up notifications about your runs including:

- Org Information
- Attribution Run Time
- Run Errors and Batch Information
- Detailed Attribution Reports

Attribution

Attribution Runs

[Schedule Runs](#)
[Run History](#)
[Notifications](#)

Email Notifications Off On

What's included in your Attribution Notification:

- Org Information
- Attribution Run Time
- Run Errors and Batch Information
- Detailed Attribution Report

Attribution Reporting Fields

Select which reporting fields you would like to include in your Attribution notification.

General Fields	Multi-touch (MT) Fields	First Touch (FT) Fields	Last Touch (LT) Fields
<input type="checkbox"/> Total Marketing Attribution Touches	<input type="checkbox"/> MT Attribution	<input type="checkbox"/> FT Generated Attribution	<input type="checkbox"/> LT Attribution
<input type="checkbox"/> Total Opportunities	<input type="checkbox"/> Weighted MT Attribution	<input type="checkbox"/> Weighted FT Generated Attribution	<input type="checkbox"/> Weighted LT Attribution
	<input type="checkbox"/> MT Accelerated Attribution	<input type="checkbox"/> FT PreSales Attribution	<input type="checkbox"/> LT Generated Attribution
	<input type="checkbox"/> Weighted MT Accelerated Attribution	<input type="checkbox"/> Weighted FT PreSales Attribution	<input type="checkbox"/> Weighted LT Generated Attribution
	<input type="checkbox"/> MT Generated Attribution	<input type="checkbox"/> MT PreSales Attribution	
	<input type="checkbox"/> Weighted MT Generated Attribution	<input type="checkbox"/> Weighted MT PreSales Attribution	

Recipients

Add Recipient ☐ Only email when errors occur during the run

No Recipients have been added. Add Recipients to begin using notifications.

Email Notifications

Email notifications are used to update you on the progress of your Attribution runs without having to access Attribution and manually check on them. Best practice is to, at a minimum, set the notifications up for the Admin of the attribution tool and check the box saying “only email when errors occur during the run” so that the administrator can be aware of issues with the run.

Attribution Reporting Fields

You can select with attribution reporting fields to include in the notifications. The value of the fields will be included in the run as well as the delta for that field between last run and the current run.

Recipients

Add recipients to the notification email list by name and email address.

Recipients

Add Recipient ☐ Only email when errors occur during the run

Enter First Name
 Enter Last Name
 Enter Email Address
 Cancel
Done

No Email Addresses have been added. Add Email Addresses to begin using notifications.

Opportunity Analyzer

This is the go-to troubleshooting tool for Attribution and also known as “Audit Logs of Attribution” for all of you LeanData Routing users out there. Keep in mind that this tool is a live query of the attribution settings so if there has been changes to the data since your last Attribution run, this tool will not be 100% indicative of what’s currently in the attribution data set.

Attribution
Opportunity Analyzer
Opportunity Analyzer allows you to understand why Marketing Attribution Touches were created for an Opportunity and why Campaign Members / Contacts / Leads were filtered out. This analyzer sheds light on missing Marketing Attribution Touches.

Find an Opportunity Find Opportunity

To use, enter an opportunity ID in the search bar and click find opportunity. Under “Marketing Attribution Touches” you can click ‘View All’ to see all of the campaign memberships that are counted as marketing attribution touches under the current settings. Under “Filtered Out” you can find the campaign members that are not considered marketing attribution touches. By clicking Details in each row, you can see why that campaign member would be filtered out from the model. Both sections described above also have search bars in order to search for specific individuals.

Attribution
Opportunity Analyzer
Opportunity Analyzer allows you to understand why Marketing Attribution Touches were created for an Opportunity and why Campaign Members / Contacts / Leads were filtered out. This analyzer sheds light on missing Marketing Attribution Touches.

Find an Opportunity Find Opportunity

Opportunity Details

Opportunity					Account
Name	Shmoogle - New Business	Stage Name	2 Discovery		Name Reale Fakedoors LLC
Segment	Default	Created Date	10/29/2019		Type Prospect
Type	New Business	Close Date	02/26/2020		
Amount	\$695,000.00				

Marketing Attribution Touches (51)
[View All](#)

Filtered Out

Campaign Members Leads and Contacts

Campaign Member Object Types Included
Lead, Contact, Opportunity Contact with Role, Account Contact with Role

1322/1373 Campaign Members Filtered [View All Campaign Members \(1373\)](#)

Name	Campaign Name	Campaign Type	Created Date	Status	Filtered Reason(s)
Stephen Hampton	WE 1702 - LD J Infer Winning Stack Webinar	Webinar	02/08/2017	Invited	Details

Settings

This is the main landing page for the settings section and is also where you can set up 'Multi-Segment Attribution'. To do so, reach out to your LeanData CSM to enable the feature.

Multi-Segment Attribution allows you to create different settings for different, mutually exclusive groups of Opportunities. The groups must be defined with one singular opportunity field and the field type has to be a string, so it could be a formula field with string type defined as Formula(String), or just a Text field, if not formula.

Attribution Settings

Set your Attribution Settings by segment. Your existing Attribution Settings reside in the default segment.

Your Attribution Settings have recently been modified.
**Your Attribution Run Data is based on your previous Attribution Run on 07/24/2021 (12:00am - PDT)*

Select an Opportunity Field To create your Segment under.

Opportunity Field

Select Opportunity Field

Create Segment

Next Attribution Run: 07/31/2021 (12:00am - PDT)
Previous Attribution Run: 07/24/2021 (12:00am - PDT)

Segment Name	Opportunity Field Values	# of Opportunities	Opportunity Amount	# of Marketing Attribution Touches	Opportunity Freeze
Default	-	252 (100.00%)	16.7M (100.00%)	6.9K	<div>Off On</div>
Attribution Run Totals		252 (100%)	16.7M (100%)	6.9K	

Creating a New Segment

To create a new segment, select the desired Opportunity Field and click the Create Segment button.

Select an Opportunity Field To create your Segment under.

Opportunity Field

State Info

▼

Create Segment

The screen you see next depends on the Opportunity Field you choose for the segment. For most segments you will see this screen.

Create Segment

Segment Name

State Info

Select values to include in your **State Info** Segment.

1 selected

Search

State Info	Current Segment	# of Opportunities	Opportunity Amount
<input checked="" type="checkbox"/> Undefined Value	Default	429 (100.00%)	\$16.7M (100.00%)
SFDC Org Totals		429 (100%)	\$16.7M (100%)

Cancel

Create Segment

Copy Default Segment Settings

Enter a name for the segment. As needed, search for the desired value(s). Select the needed value(s) and click Create Segment.

Segment Settings

For the majority of folks that choose to simply use one default segment, you can hover over that row and click on it (it will highlight green when hovering) in order to access your settings.

Segment Name	Opportunity Field Values	# of Opportunities	Opportunity Amount	# of Marketing Attribution Touches	Opportunity Freeze	
Default	-	252 (100.00%)	16.7M (100.00%)	6.9K	Off On	Actions
Attribution Run Totals		252 (100%)	16.7M (100%)	6.9K		Settings

Cancel
Save Segment

Default

General
Marketing Attribution Touches
Sales Touches
Opportunities
Advanced

Marketing Attribution Touch Time Frame
Select a relevant influence timeframe to associate with Marketing Attribution Touches.

Days

Campaign Member Object Types
Select relevant Campaign Member Object Types for which you would like to attribute Marketing Attribution Touches.

☒ **Lead**

☒ New
☒ Unqualified
☒ Inquiry
☒ SAL - Connected
☒ Needs to be Re-Assigned
[Add Inactive Status](#)

☒ Contacted
☒ SAL
☒ SQL
☒ Dupe

☒ Nurturing
☒ MQL - Open
☒ MQL - Reopened
☒ MQL

☒ Qualified
☒ Suspect
☒ Nurture
☒ Converted by LeanData

☒ **Contact**

☒ **Opportunity Contact with Role**

☒ **Account Contact with Role**

General

Marketing Attribution Touch Time Frame

Also known as the Opportunity Lookback Window. This is the number of days that you set which determines how many days *before* the opportunity create date we will count relevant campaign memberships as marketing touches. For example, if your Marketing Attribution Touch Time Frame is 365 days and someone attended a webinar 380 days ago that touch would **not** count for an opportunity that is created today.

Campaign Member Object Types

Select which campaign member object types you would like to include in the attribution model as well as which lead statuses you would like included vs. excluded for Lead Campaign Members.

Please note: When selecting your settings in the Settings pages, please remember to click 'Save' in the upper right corner.

Marketing Attribution Touches

This page is used to select which campaign memberships are relevant and will be created as marketing touches. To include a select campaign type, click the checkbox of that campaign type and the underlying member statuses that are relevant to the attribution model for that campaign type. If you select a campaign type and member statuses but receive an error upon saving, it is likely that there are no existing campaign members for what you selected. You will have to unselect those and reselect them when there are existing campaign members for those campaign types/member statuses.

Default

General
Marketing Attribution Touches
Sales Touches
Opportunities
Advanced

Campaign Type and Campaign Member Status

Select relevant Campaign Types and Campaign Member Statuses to include in your Engagement reports.
Note: Not seeing the Campaign Types or Member Statuses you're looking for? [Refresh Your Analytics Campaign Data](#)

Campaign Types (82)

Search Campaign Type or Member Status

Select 'Has Responded' Statuses

Blank Campaign Type

Advertisement

Responded

Sent

Advertising

Engaged Ten

Engaged Five

Engaged Twice

Engaged Once

Visited

Responded

Sent

Advocacy

Please Note: Keep in mind that contrary to the old attribution tool, this is an **inclusionary** model so if there are new campaign types or member statuses that are added, you will have to access the settings page and select them if you would like them to be included.

Sales Touches

This is where you can set which Tasks and Events are included as Sales Touches for your Attribution Model. Keep in mind that Sales Touches cannot be reported on and are not given attribution. They do show up on the opportunity Buyer's Journey Visualforce Page and can act as a filter on your reports to isolate touches or attribution metrics for marketing touches that occur **prior to the first sales touch** to assist with tracking what's truly marketing sourced.

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General
Marketing Attribution Touches
Sales Touches
Opportunities
Advanced

Select which Sales Types, Statuses, and Event Types you would like to include in your Attribution Run.
Note: Your selection here will power the Buyer's journey on your Opportunity page.

☒ Enable Archived Activities [?](#)

☐ Include 'Opportunity Created Date' as a Sales Touch

Task Type
Select relevant sales tasks to include in your Attribution runs.
☒ Enable Sales Tasks

<input type="checkbox"/> Blank Task Type	<input checked="" type="checkbox"/> Call	<input checked="" type="checkbox"/> Connect	<input checked="" type="checkbox"/> Demo
<input checked="" type="checkbox"/> Demo Completed	<input checked="" type="checkbox"/> Demo Scheduled	<input checked="" type="checkbox"/> Dial	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> LVM	<input checked="" type="checkbox"/> Meeting	<input checked="" type="checkbox"/> Onsite Meeting	<input checked="" type="checkbox"/> Other
<input checked="" type="checkbox"/> Research	<input checked="" type="checkbox"/> SME Engagement	<input checked="" type="checkbox"/> Social	

Task Status
Select relevant task statuses to include in your Attribution runs.

<input checked="" type="checkbox"/> Completed	<input type="checkbox"/> Deferred	<input type="checkbox"/> In Progress	<input type="checkbox"/> Not Started
<input type="checkbox"/> Waiting on someone else			

Event Type
Select relevant event types to include in your Attribution runs.
☒ Enable Sales Events

<input type="checkbox"/> Blank Event Type	<input checked="" type="checkbox"/> Call	<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Meeting
<input checked="" type="checkbox"/> Other			

Select which tasks and events are relevant based on their Task Type, Status, or Event Type. If those three fields are too broad you can also add filter conditions on the task and event objects in the “Filters” section under “Advanced” in Settings.

Opportunities

This section allows you to define which Opportunities will actually receive attribution. For example, you might not want Renewals or some operational opportunity type included in your attribution totals. You can exclude opportunities based on Opportunity Type, Opportunity Stage, Closed/Won Stage, or Closed/Lost stage.

General
Marketing Attribution Touches
Sales Touches
Opportunities
Advanced

Opportunity Types

Select relevant Opportunity Types to include in your Attribution run.

<input type="checkbox"/> Blank Opportunity Type (44)	<input type="checkbox"/> Beta Product (0)	<input checked="" type="checkbox"/> Existing Business (0)
<input checked="" type="checkbox"/> New Business (226)	<input checked="" type="checkbox"/> Partner Sign Up (0)	<input checked="" type="checkbox"/> Renewal (68)
<input type="checkbox"/> Services (42)	<input type="checkbox"/> Suspect (0)	<input type="checkbox"/> To Partner (0)
<input type="checkbox"/> Trial (8)	<input checked="" type="checkbox"/> Upsell/Existing Business (40)	<input type="checkbox"/> Growth Increase (1)

Opportunity Stages

Select relevant Opportunity Stages to include in your Attribution run.

Open

<input checked="" type="checkbox"/> 1 First Call (1)	<input checked="" type="checkbox"/> 2 Discovery (7)	<input checked="" type="checkbox"/> 3 Business Case (34)
<input checked="" type="checkbox"/> 4 Product Validation (2)	<input checked="" type="checkbox"/> 5 Proposal (1)	<input checked="" type="checkbox"/> 6 Contract Signed (0)
<input checked="" type="checkbox"/> Business Case (0)	<input checked="" type="checkbox"/> Demo (0)	<input checked="" type="checkbox"/> Evaluation (0)
<input checked="" type="checkbox"/> Id. Decision Makers (0)	<input checked="" type="checkbox"/> Needs Analysis (0)	<input checked="" type="checkbox"/> Negotiation/Review (0)
<input checked="" type="checkbox"/> Perception Analysis (0)	<input checked="" type="checkbox"/> Proposal/Price Quote (0)	<input checked="" type="checkbox"/> Prospecting (42)
<input checked="" type="checkbox"/> Qualification (1)	<input type="checkbox"/> Trial - Active (0)	<input type="checkbox"/> Trial - Completed (8)
<input checked="" type="checkbox"/> Value Proposition (0)	<input type="checkbox"/> Stage 1: Initial Engagement (22)	<input type="checkbox"/> Stage 2: Discovery (20)
<input type="checkbox"/> Stage 3: Business & Solution Ali... (20)	<input type="checkbox"/> Stage 4: Validation (4)	<input type="checkbox"/> Stage 5: Negotiation (3)

Opportunity Stage Mapping

The Opportunity Stage Mapping section allows you to Map opportunity stages. For example, if you'd like to count a certain opportunity stage as closed won that's not already marked as closed won in your SFDC setup you can map it in that section and indicate it as such under 'stage type'.

Opportunity Stage Mappings

Map your Opportunity Stages.

Original Stages	Mapped Stage	Stage Type
Select Original Stage(s) ▼	Enter Mapped Stage	Select Type ▼
Closed Lost	Closed Lost	Closed/Lost
Closed Won	Closed Won	Closed/Won

Advanced

The Advanced Tab allows you to add filters to include/exclude data in the Attribution run.

General
Marketing Attribution Touches
Sales Touches
Opportunities
Advanced

Filters
Field Mappings
Weighting
Opportunity Freeze

Add Filters to include/exclude data from your Attribution run.
Note: Conditions do not support comma-separated values.

Add Filter(s) ▼

Account Filter
Remove Filter

Account Field	Operator	Value
1 Search ▼	equals ▼	Enter Value ✕

Add Condition

Rule Logic 1 [Reset](#)

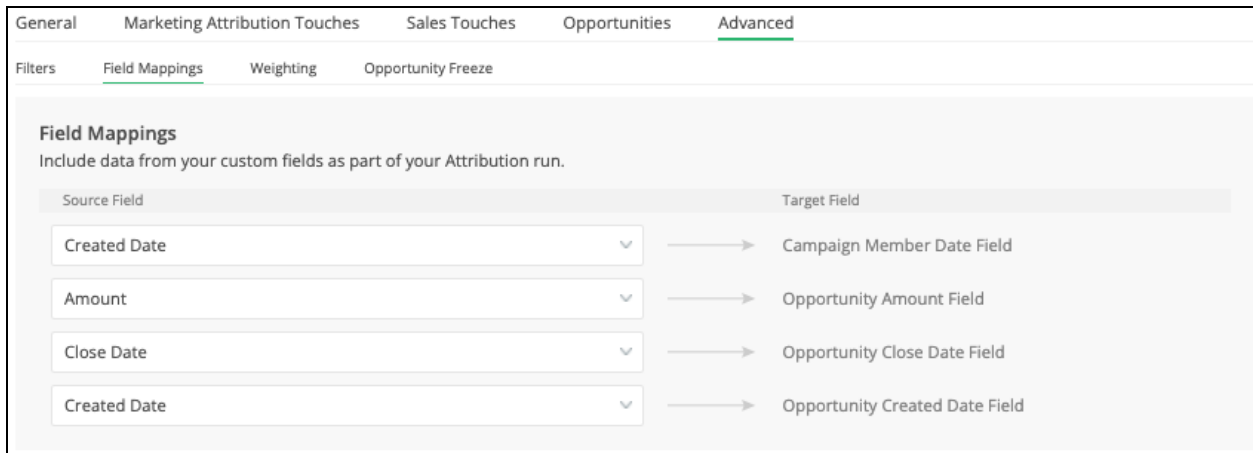
Filters

These are equivalent to 'custom filters' in the old attribution tool. This section allows you to filter records in or out based on any standard or custom field on any of the Marketing Attribution Touches' related objects using tuple filters with operators.

Please note that these filters are **inclusionary** so if you would like to exclude something you would use operators like 'not equal to' or 'does not contain'.

Field Mappings

This section allows you to switch from using the default SFDC fields, to custom fields that are more pertinent to your business. One common use case is that the standard amount field is used for attributing dollar amounts, unless mapped to a different currency field on the opportunity object. Another example is that by default, we use the campaign member create date to determine when a marketing touch (campaign membership) actually happened. If there is a different date/time field on the campaign member object, that better indicates when the marketing interaction occurred (some users pick a Member First Associated Date or First Responded Date), you can map to that field.



Source Field	Target Field
Created Date	Campaign Member Date Field
Amount	Opportunity Amount Field
Close Date	Opportunity Close Date Field
Created Date	Opportunity Created Date Field

Marketing Touch Weighting

Not all touches are created equally. You may come across instances where you have relevant marketing touches, but you would like them to have differing impacts on marketing attribution value. For example, an in-person dinner product deep dive touch is probably a little more meaningful than attending a webinar.

Filters
Field Mappings
Weighting
Opportunity Freeze

These settings allow you to weight Campaign Member Object Types within your Attribution run. To modify your Campaign Member Object Type selection, visit the General Tab.

Note: If you select 0 as a weight, then Marketing Attribution Touches will be created, but Attribution amounts will not be assigned to those touches.

Campaign Member Object Type Weighting ☐ Off ☒ On

Lead	0 1 2 3 4 5 6 7 8 9 10
Contact	0 1 2 3 4 5 6 7 8 9 10
Opportunity Contact with Role	0 1 2 3 4 5 6 7 8 9 10
Account Contact with Role	0 1 2 3 4 5 6 7 8 9 10

Weigh your Campaign Types and Campaign Member Statuses to further customize your Attribution run.

Campaign Weighting ☐ Off ☒ On ☐ Weigh Campaign Member Status

Campaign Types (82)

Blank Campaign Type	0 1 2 3 4 5 6 7 8 9 10
Advertisement	0 1 2 3 4 5 6 7 8 9 10
Advertising	0 1 2 3 4 5 6 7 8 9 10
Advocacy	0 1 2 3 4 5 6 7 8 9 10
Banner Ads	0 1 2 3 4 5 6 7 8 9 10
Content	0 1 2 3 4 5 6 7 8 9 10

LeanData Attribution allows weighting of campaign type and campaign member statuses (by campaign type) across a 1 - 10 scale. By default, weighting is disabled and attribution is distributed equally across all relevant marketing touches.

Weighting is a value that is relative to other weighting values. In other words, if all campaign types are weighted 1, it would have the same effectiveness as if all campaign types are weighted 10.

Example:

The following illustrates a simple example of weighting in action:

- Opportunity A
 - Amount: \$1,000
- Campaigns
 - Campaign X
 - Type: Webinar
 - 1 relevant marketing touch on Opportunity A
 - Campaign Member Status: attended
 - Campaign Y:
 - Type: Dinner Demo

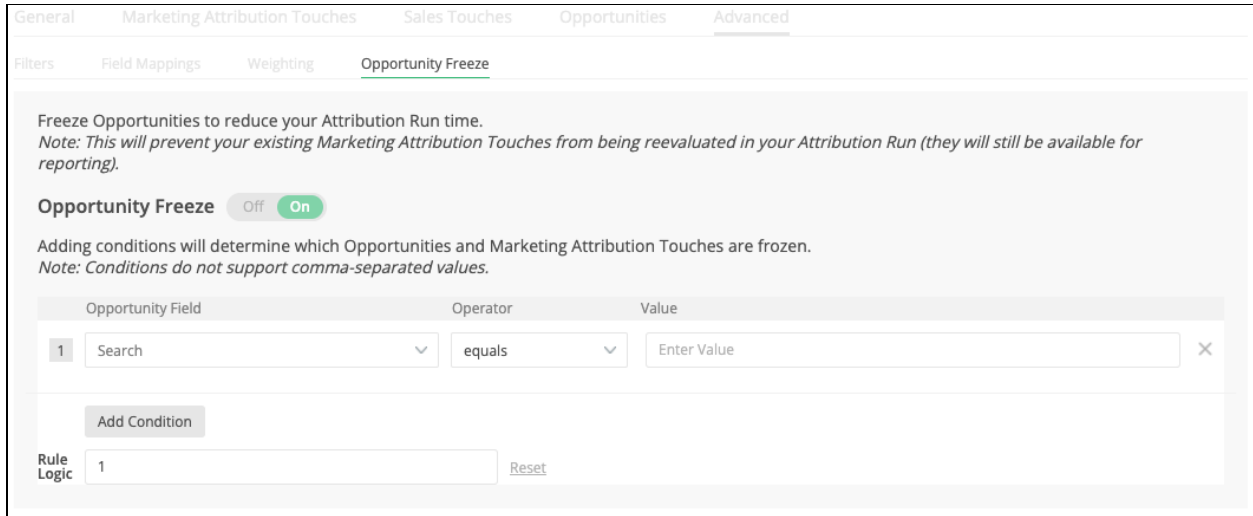
- 1 relevant marketing touch on Opportunity A
- Campaign Member Status: attended

How much credit is applied under the weighted and non-weighted models?

- Non-Weighted Attribution
 - Campaign X campaign member: \$500 ($\$1,000 / 2$)
 - Campaign Y campaign member: \$500 ($\$1,000 / 2$)
- Weighted Attribution
 - Weights
 - Webinar: 2
 - Dinner Demo: 6
 - Attribution
 - Campaign X campaign member: \$250 [$\$1,000 / (2 / (2 + 6))$]
 - Campaign Y campaign member: \$750 [$\$1,000 / (6 / (2 + 6))$]

Opportunity Freeze

Opportunity Freeze is used to reduce long attribution run times by “freezing” a portion of the data set that we know is not going to change. Each attribution run deletes all marketing touches and recalculates everything all over again. With freeze on, you can use opportunity fields to dictate which opportunities do not have attribution re-run. For example, a popular filter that can be used is [‘closed’ equals true AND ‘closed date’ greater than Last 365 Days], meaning that any opportunity that was closed more than a year ago will be frozen.



The screenshot shows the 'Opportunity Freeze' configuration page. At the top, there are tabs for 'General', 'Marketing Attribution Touches', 'Sales Touches', 'Opportunities', and 'Advanced'. The 'Opportunities' tab is selected, and within it, the 'Opportunity Freeze' sub-tab is active. Below the tabs, there's a section titled 'Freeze Opportunities to reduce your Attribution Run time.' with a note: 'Note: This will prevent your existing Marketing Attribution Touches from being reevaluated in your Attribution Run (they will still be available for reporting).' Below this, the 'Opportunity Freeze' toggle is set to 'On'. Another note states: 'Adding conditions will determine which Opportunities and Marketing Attribution Touches are frozen. Note: Conditions do not support comma-separated values.' Below the notes is a table with three columns: 'Opportunity Field', 'Operator', and 'Value'. The first row shows 'Search' as the field, 'equals' as the operator, and 'Enter Value' as the value. There is an 'Add Condition' button below the table. At the bottom, there is a 'Rule Logic' section with a dropdown set to '1' and a 'Reset' button.

Please note: If any changes occur to opps that fit the freeze criteria, those opps will not be considered in the run so this may lead to data inaccuracies. Please make sure the opps you are freezing will not change at all, and if they do, you'll need to complete a one time run without opp freeze after those opp changes are made.

Advanced Settings

The advanced Settings are home to the settings for Campaign Costs, Marketing Attribution Touch Mapping, and using Multiple Currencies in your attribution runs.

Campaign Costs

Campaign Costs allows a marketer to add a “placeholder” cost while they are waiting for financial costs to be calculated for a particular campaign. When actual campaign costs are added to the Actual Cost field in Salesforce, they will overwrite the average cost.

Input the dollar value of the average campaign of this type. You have the option of removing all values by pressing the “Reset All Campaign Costs” link at the top.

Advanced Settings

Campaign Costs

This feature allows you to map a custom Campaign Cost Field or assign average Campaign Costs by Campaign Type.
*Important: These Campaign Costs will **only** be used when a Campaign does **not** have a value in the "Actual Cost" field in Salesforce.*

Field Mapping

Custom Campaign Cost Field (Campaign)	Target Field (Marketing Attribution Touch)
<div>Actual Cost in Campaign (Default) ▾</div>	Campaign Cost Field

Average Campaign Costs

Reset All Costs

Campaign Type	Cost
Blank Campaign Type	<div>\$0</div>
Advertisement	<div>\$0</div>
Advertising	<div>\$0</div>
Advocacy	<div>\$0</div>

Field Mapping

This allows you to map to a custom campaign cost field from your campaign object.

Average Campaign Costs

This feature allows you to set an average campaign cost by campaign type to be used when there is not a value populated in the standard field ‘Actual Cost’

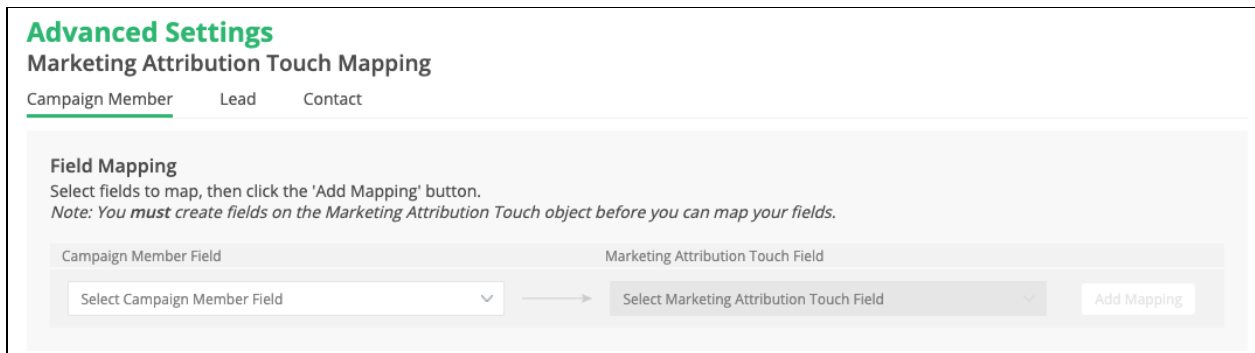
Marketing Attribution Touch Mapping

Marketing touch mapping allows you to map fields from the campaign member, lead, and contact objects to the marketing attribution touch object. To do so, please create a field on the marketing attribution touch and temporary marketing touch objects with the same data type as the field you're trying to map.

Popular use cases for this tool are if you're trying to map UTM values from the campaign member object to the Marketing Attribution Touch object to track attribution from a UTM source perspective. Another use case is consolidating fields from lead and contact objects into one marketing attribution touch field such as full name from lead and contact.

Campaign Member

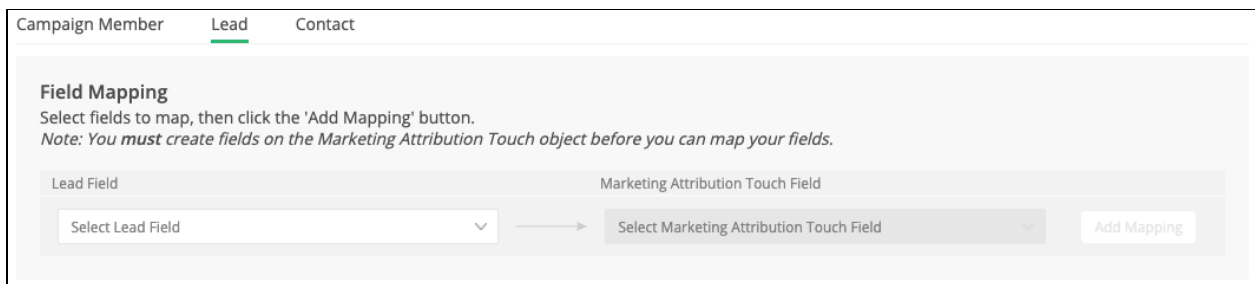
Use the Campaign Member section to map the Campaign Member Field to the corresponding Marketing Attribution Touch Field.



The screenshot shows the 'Advanced Settings' page for 'Marketing Attribution Touch Mapping'. The 'Campaign Member' tab is selected. Under 'Field Mapping', there is a note: 'Select fields to map, then click the 'Add Mapping' button. Note: You must create fields on the Marketing Attribution Touch object before you can map your fields.' Below this, there are two dropdown menus: 'Campaign Member Field' (with the placeholder 'Select Campaign Member Field') and 'Marketing Attribution Touch Field' (with the placeholder 'Select Marketing Attribution Touch Field'). An arrow points from the first dropdown to the second. To the right of the second dropdown is an 'Add Mapping' button.

Lead

Use the Lead section to map the Lead Field to the corresponding Marketing Attribution Touch Field.



The screenshot shows the 'Advanced Settings' page for 'Marketing Attribution Touch Mapping'. The 'Lead' tab is selected. Under 'Field Mapping', there is a note: 'Select fields to map, then click the 'Add Mapping' button. Note: You must create fields on the Marketing Attribution Touch object before you can map your fields.' Below this, there are two dropdown menus: 'Lead Field' (with the placeholder 'Select Lead Field') and 'Marketing Attribution Touch Field' (with the placeholder 'Select Marketing Attribution Touch Field'). An arrow points from the first dropdown to the second. To the right of the second dropdown is an 'Add Mapping' button.

Contact

Use the Contact section to map the Contact Field to the corresponding Marketing Attribution Touch Field.

Campaign Member
Lead
Contact

Field Mapping

Select fields to map, then click the 'Add Mapping' button.

Note: You must create fields on the Marketing Attribution Touch object before you can map your fields.

Contact Field

Marketing Attribution Touch Field

Select Contact Field

Select Marketing Attribution Touch Field

Add Mapping

Multi Currency

The Multi Currency Settings are used to control multiple currencies in your Attribution runs. Only Opportunities with the selected currencies will be included in the run.

Please Note: If multiple currencies are included in your Attribution run, then your Attribution amounts will be converted to the Corporate Currency.

Advanced Settings

Multi-Currency

These settings control multi-currency within your Attribution run. Only Opportunities corresponding to your selected currencies will be included within Attribution.

Note: If multiple currencies are included in your Attribution run, then your Attribution amounts will be converted to the Corporate Currency.

Included Active Currencies

Currency	
USD (Primary)	<input checked="" type="checkbox"/>

Settings Change Log

The Settings Change Log displays all changes that are made to your Attribution settings. Each entry includes:

- Segment - Global if you aren't using multi-segment.
- Settings Page - Where the changes occurred
- Description - Description of the change
- Date and Time - When the change occurred
- User - Who made the changes

Attribution

Settings Change Log

This log displays all modifications made to your Attribution Settings.

Segments: All		Settings: All		
Segment	Settings Page	Description	Date & Time	User
Global	Attribution Settings	Segment Definitions Opportunity Segment Field Setting	3/11/21, 4:14 PM	Conner Treuhaft
Global	Attribution Settings	Segment Definitions	2/18/21, 1:48 PM	Conner Treuhaft
Global	Attribution Settings	Segment Definitions	2/18/21, 1:48 PM	Conner Treuhaft
Marketing Touch LT Generated Time Frame Sales Touch Time Frame Custom Opportunity Stage Mapping Marketing Touch FT Time Frame Included Opportunity Types				

When you mouse over each of the log entries, you will see the row becomes highlighted and a View Logs button will appear. Clicking on the View Logs button will display a page with more details about the changes.

Global	Attribution Settings	Segment Definitions	2/18/21, 1:48 PM	Conner Treuhaft	View Logs
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Settings Change Logs > Segment Settings - Log					
Segment Settings - Log					
Conner Treuhaft - 2/18/21, 1:48 PM					
Marketing Touch LT Generated Time Frame Previous/Current Settings	Removed		Added		
	Nothing Removed		null		
Sales Touch Time Frame Previous/Current Settings	Removed		Added		
	Nothing Removed		null		
Custom Opportunity Stage Mapping Previous/Current Settings	Removed		Added		
	Nothing Removed		Closed Lost -> Closed Lost		
			Closed Won -> Closed Won		
	Removed		Added		