LeanData View

Settings Guide

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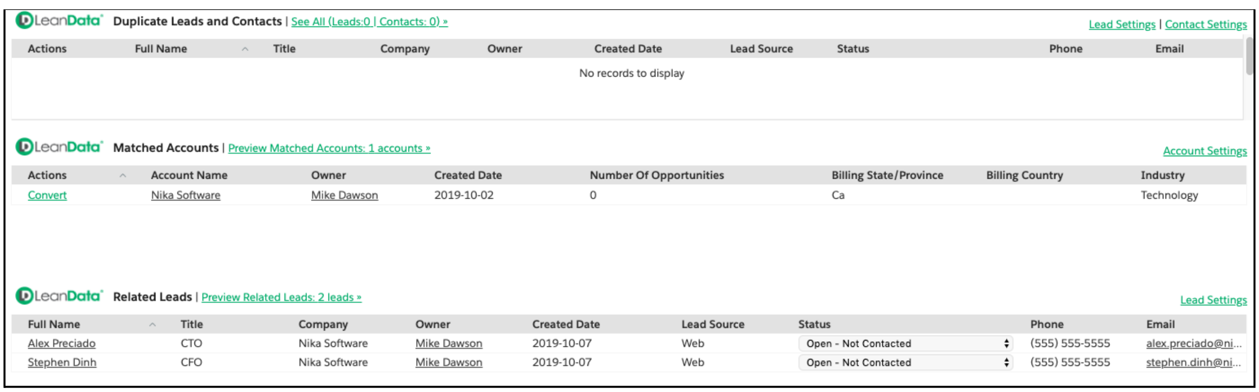
Overview

The LeanData View product is a Visualforce page that displays matched Lead, Contact, and Account information on a record in Salesforce. The View product may be displayed on Leads, Contacts, and Accounts in Salesforce. You can use the View section in the LeanData app to configure what information and actions a user can access and perform on Salesforce Leads, Accounts, and Contacts from the LeanData View product.

Example: *Stephen is the Salesforce Admin for GlobalWorld Software. GlobalWorld has just become a customer of LearnData's and Stephen has been tasked with configuring the View product in Salesforce. After adding the View product to the Leads, Accounts and Contact pages in Salesforce, Stephen needs to configure the View Settings.*



General Settings

In the LeanData app on the side navigation, you can access the settings under the View menu item. Under View, you will find 2 items: General and Layout. The General section has options to control the behaviour of the LeanData View page. The Layout section has options for controlling the fields that appear in the View.

You can use the View section in the LeanData app to configure what information and actions a user can access and perform on Salesforce Leads, Accounts, and Contacts from the LeanData View product.

The LeanData View can be modified by a user with the LeanData Custom Objects Full Access or LeanData Custom Objects Read-Write permission set.

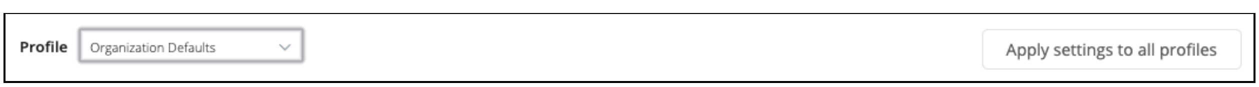
Profile

The Profile pull-down menu lets you choose which Salesforce profile to assign the settings to. You can select a specific profile, configure the View Settings as needed, and update the settings. You have several options on how to configure the settings by profile:

- Change the default settings for all profiles
- Set options for individual profiles
- Reset a profile to the default settings

Change the Default Settings for All Profiles

When you first load the General Settings page, the Profile pull-down is set to Organization Defaults. With this profile, any changes made to the settings are applied as default organization-wide settings. If you want to reset settings that have been set for all individual profiles back to these organization default settings, click on the Apply Settings to All Profiles after you have updated the settings on the screen.



Set Options for Individual Profiles

When you select the specific profile from the Profile pull-down, any changes to the settings will be applied to only that profile when you click Update Settings.

Reset a Profile to the Default Settings
If you need to reset the View settings for a specific profile back to the defaults, select the desired profile and click the Copy Default Settings button in the upper right corner of the screen.

Other Settings

In addition to the Profile options there are 3 settings in this section that apply to all the pages of the View Product.

- Open View Sections in New Tab
- Use Custom Convert Link
- Allow User Column Customizations

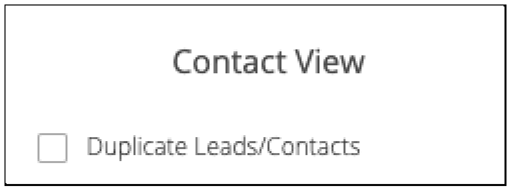
Open View Sections in New Tab
Check this option if you want to open the View as a link in a new tab instead of replacing the contents of the current tab. When this setting is unchecked, any link you click in the View section will replace the contents of the tab you are using.

Use Custom Convert Link
If your organization uses its own conversion page for Leads in Salesforce, you can use the custom conversion link to set the LeanData View to open your conversion page when a user converts Leads. When this option is checked you can enter a custom url in the text field provided. When a user converts a Lead it will use the custom link instead of Salesforce's default convert process.

Allow User Column Customizations
This option allows the View Columns to be configured by each user. When checked, each user will be able to configure the columns in the View product for themselves. Use the Disable Actions options to prevent users from performing actions on records from the View such as merging duplicate Leads.

Contact View

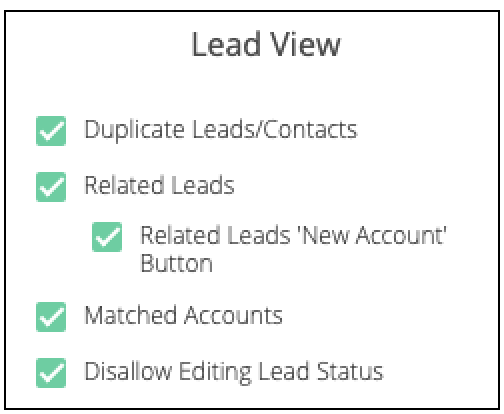
Use the Contact View section to configure the items that appear in the View section on Contact records. When Duplicate Leads/Contacts is unchecked, you will not see any duplicate Leads or Contacts in the LeanData View on a Contact Record.



Lead View

Use the Lead View section to configure the items that appear in the View section of a Lead record. The options in the Lead View Settings are:

- Duplicate Leads/Contacts
- Related Leads
- Related Leads New Account Button
- Matched Accounts
- Disallow Editing Lead Status



Duplicate Leads/Contacts
When Duplicate Leads/Contacts is unchecked, you will not see any duplicate Leads or Contacts in the LeanData View on a Lead Record.

Related Leads
When Related Leads is unchecked, you will not see any related Leads in the LeanData View on a Lead record.

Related Leads 'New Account' Button
The 'New Account' button is used when a customer has a number of related Leads and wants to convert them to a New Account. Most customers have this option unchecked.

Matched Account
When Matched Accounts is unchecked, you will not see any Matched Accounts in the LeanData View on a Lead record.

Disallow Editing Lead Status
When Disallow Editing Lead Status is checked, users will not have the option of changing the Lead Status of Related Leads on the Lead Record. The following screenshot shows the pull-down when this option is checked.

Lead Source	Status	Phone
Web	Open - Not Contacted	(555) 555-5555
Web	Open - Not Contacted	(555) 555-5555

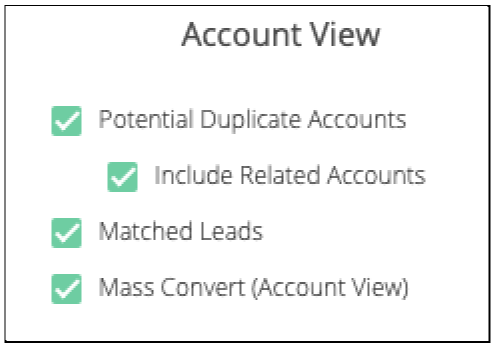
When this option is unchecked, there is a pull-down in the Status column of the Related Leads. This pull-down lets you change the status of the related Lead as needed. The following screenshot shows the pull-down when this option is unchecked.

Status
Open - Not Contacted
Open - Not Contacted

Account View

Use the Account View section to configure the items that appear in the View section of an Account record. The options in the Account View Settings are:

- Potential Duplicate Accounts
- Include Related Accounts
- Matched Leads
- Mass Convert (Account View)



Potential Duplicate Accounts
When this option is unchecked, you will not see any potential duplicate Accounts in your Salesforce organization.

Include Related Accounts
When this option is unchecked, you will not see any related Accounts in the Account View. A related Account occurs when 2 Accounts are a part of the same Account hierarchy.

For example: *The Disney Account is set as a parent Account to the ABC and ESPN Accounts. If you viewed the Account record for ESPN and Include Related Accounts is checked, you will see ABC in the LeanData View section of the Account record.*

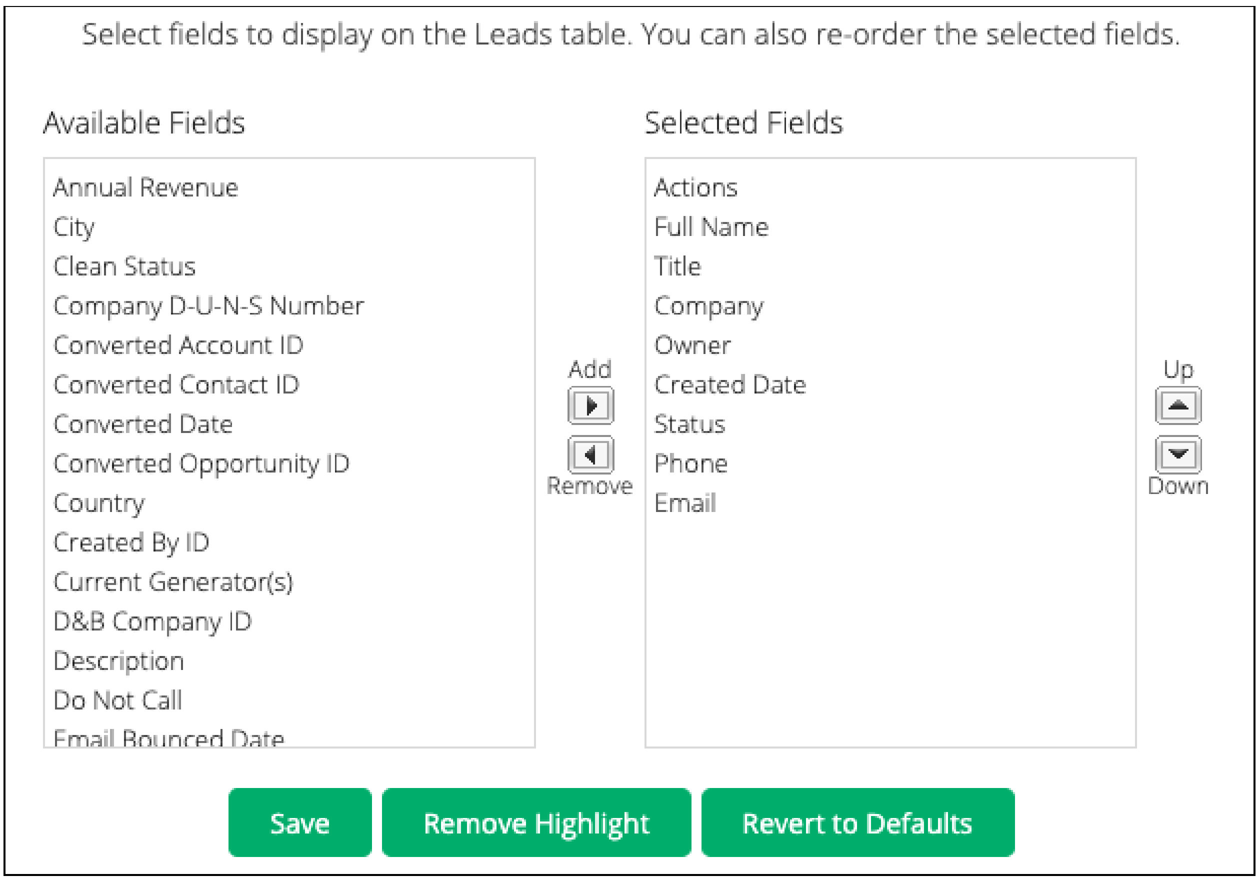
Matched Leads
When this option is unchecked, you will not see any matched Leads in the LeanData View on the Account record.

Mass Convert (Account View)
When the Mass Convert (Account View) is unchecked, you will not see the Mass Convert link in the Matched Lead section of the LeanData View on an Account record. The Mass Convert link allows you to select multiple matched Leads and convert them to Account Contacts in one action.

Layout Settings

The Layout Pages give you control over the fields in the LeanData View that appear on each record type. With these settings you have control over the fields in the following View sections:

- Leads
- Contacts
- Accounts
- Related Leated
- Mass Convert



Leads
Use the settings on the Lead Layout to control the fields that appear in the Leads Table of the LeanData View. On this page, you can add/remove fields, change the order of the fields in the table, and Revert all changes back to the Defaults.

To edit the field list:
1. In the LeanData app, select View from the side navigation.
2. Select Layout, then select Leads to open the Leads Layout Settings.
3. Click to highlight a field in either the Available or Selected Fields.
    - Use the Add or Remove buttons to move fields between Available and Selected Fields as needed.
    - Use the Up and Down arrows to change the order of the fields in the Selected Fields section.
    - Use the Remove Highlight button to clear the highlight from the selected fields
    - Use the Revert to Default button to revert all changes back to the default settings
4. Click Save to Save your changes.

Each of the screens under Layout function the same as the Lead Layout settings. Make edits as needed using the instructions above.

Troubleshooting

If you have gone through all the setup instructions and settings but have users that are unable to see the LeanData View, you need to check the following:
- Check the User's profile for accessibility to VisualForce pages
- Check the VF page's security settings to confirm that it is externally accessible
- Have the user clear their browser Cache and History
- Try different browsers

Summary

This guide has presented the tools and options for configuring the LeanData View Product. View is a Visualforce page that displays matched Account, Lead, and Contact information on a record in Salesforce. You can use the View section in the LeanData app to configure what information and actions a user can access and perform on Salesforce Leads, Accounts, and Contacts from the LeanData View product.