LeanData View

Setup Guide

Overview

The following will walk you through the installation of the LeanData View to display matched leads within accounts, matched accounts within leads, and duplicate leads and contacts.

The LeanData managed app allows you to:

- Increase sales and marketing velocity to close deals and opportunities more quickly
- Increase SDR productivity by up to 20%
- Enable account-based sales and marketing

Functionality includes:

- View matched leads within accounts
- View matched accounts within leads
- View duplicate leads and contacts within leads and contacts
- Match and convert leads into matched accounts
- Merge duplicate leads

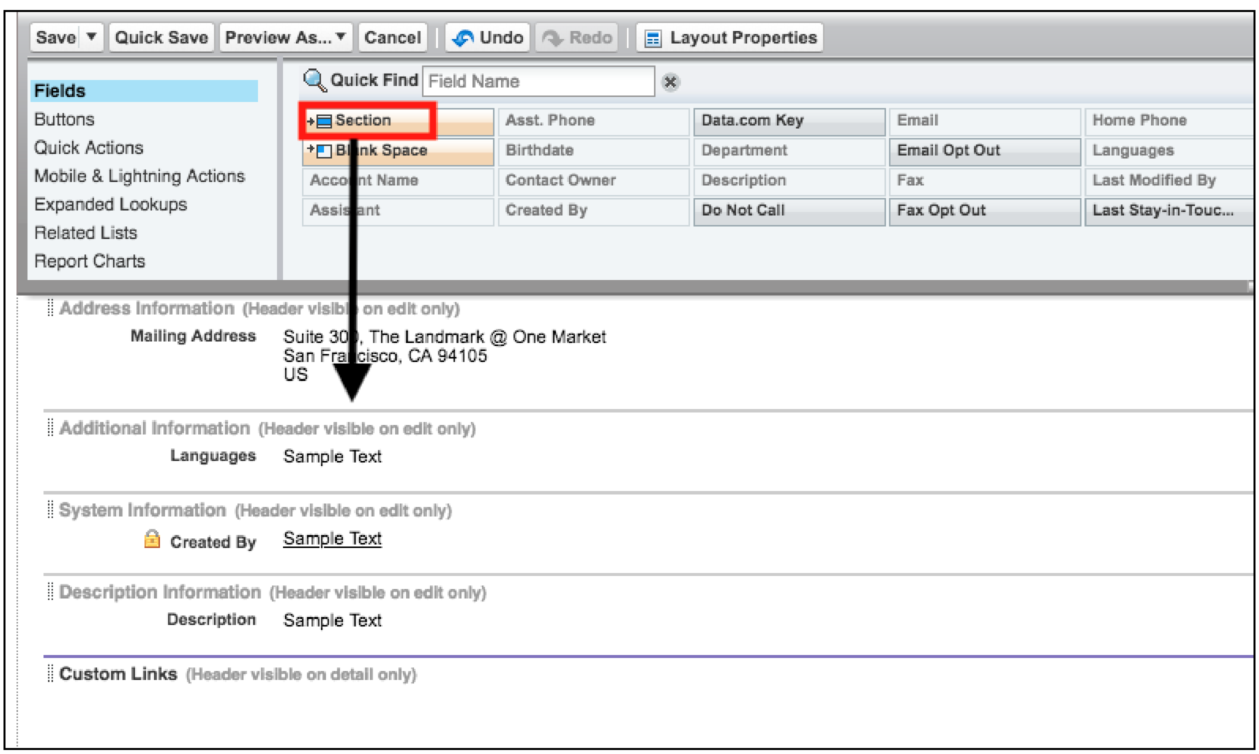
Overall installation process includes:

1. Install LeanData managed app from AppExchange
2. Add LeanData View Visualforce page within lead, contact, and account page layouts
    - Any or all layouts can be modified
    - The main differences between the three layouts
        - Visualforce component to add
            - Leads: LeadLayout
            - Contacts: ContactLayout
            - Account: AccountLayout
        - Set Visualforce Page Properties
            - **Height**: 350 pixels (460 pixels for lead layout)
3. Assign permission set to users

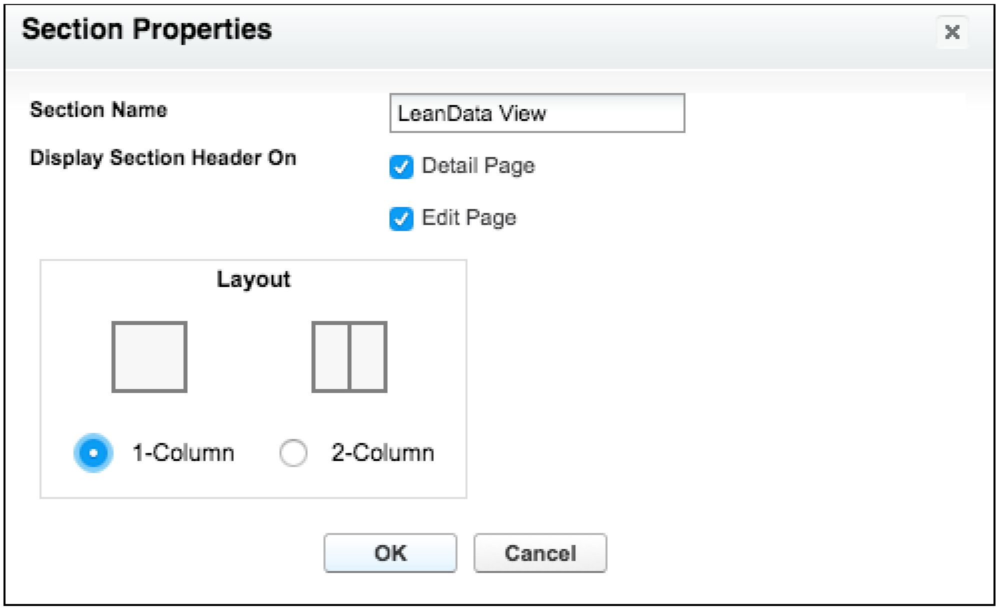
Add a Lead Page Layout

View any matched accounts, duplicate leads or contacts, and related leads

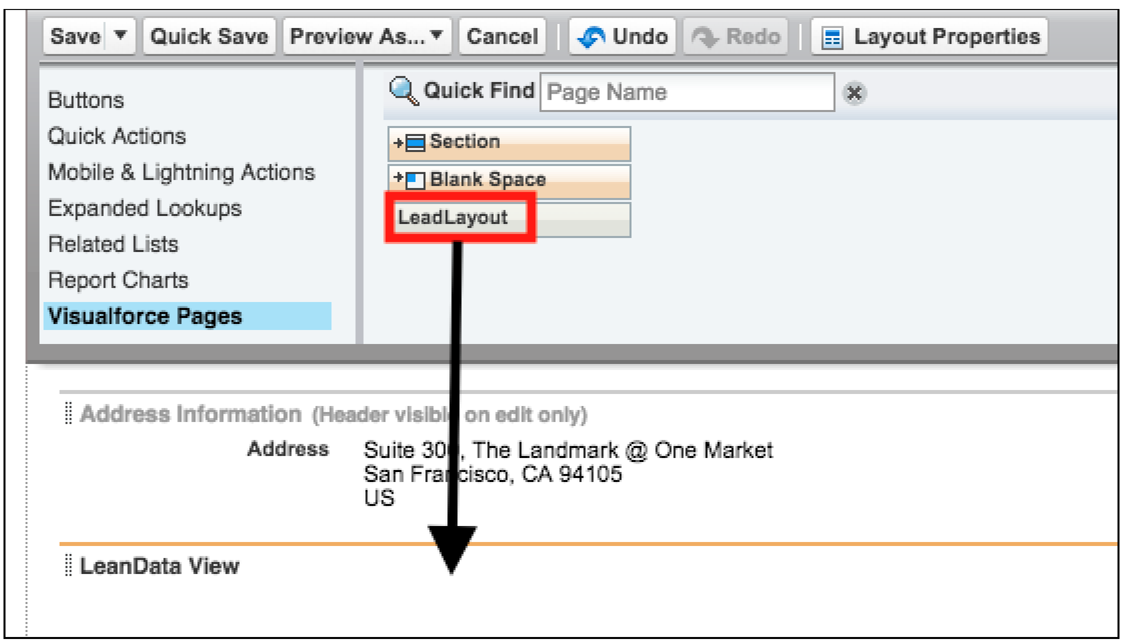
1. Within Salesforce.com Setup, go to Lead within Object Manager
2. Click Page Layouts then select the layout you'd like to modify
3. Create a new Section by clicking and dragging down a Section from the top into the layout – you can place this new section anywhere you see a green box with a check



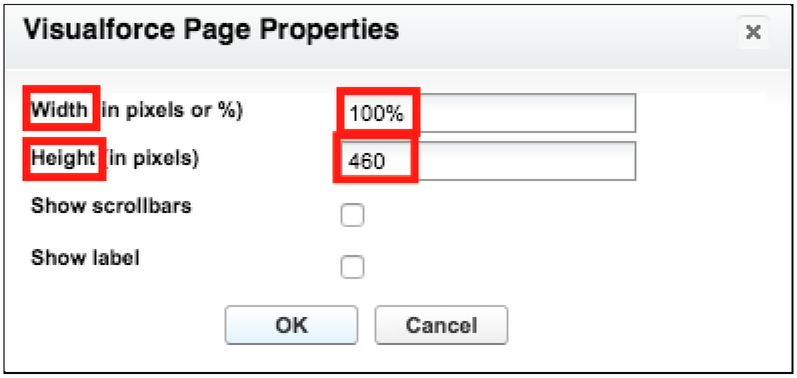
4. Name the section “LeanData” and select 1-Column



5. Within the Visualforce Pages section, click and drag “LeadLayout” into the LeanData section you just created.



6. Click Properties (wrench icon) within the Visualforce page area (colored section)
7. Set the following values:

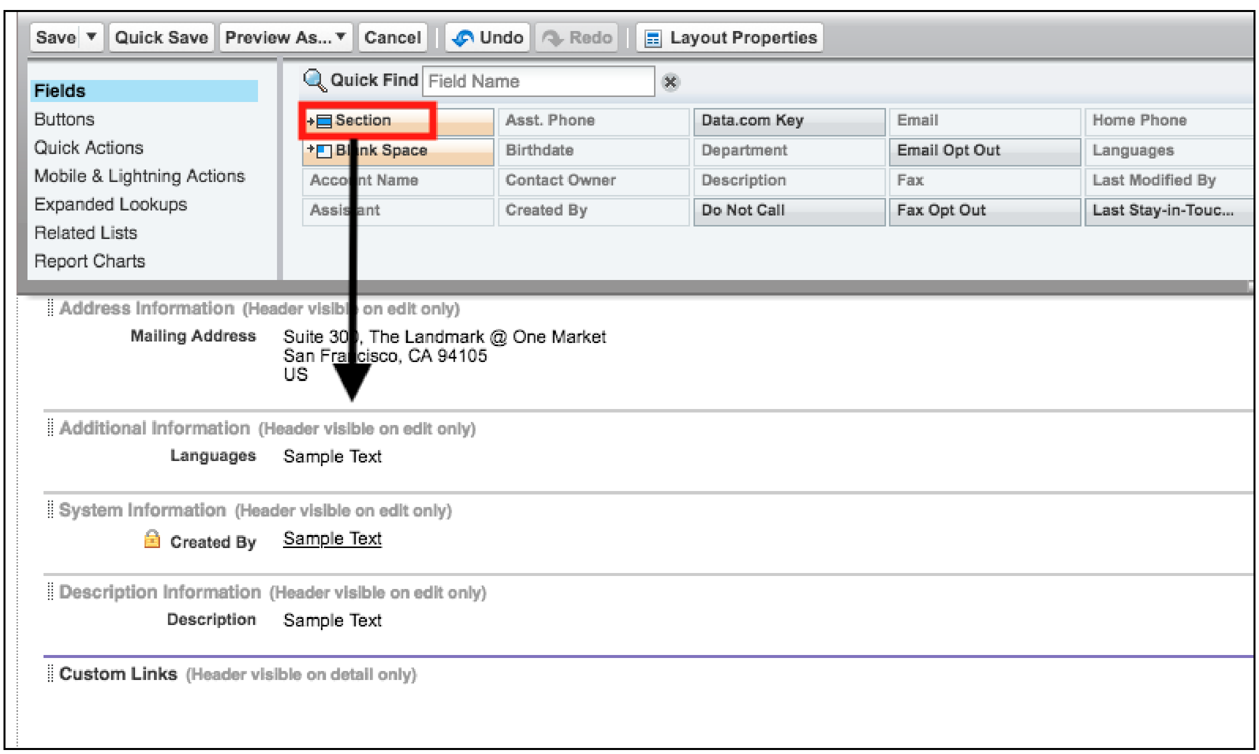


8. Click OK and Save your lead layout changes

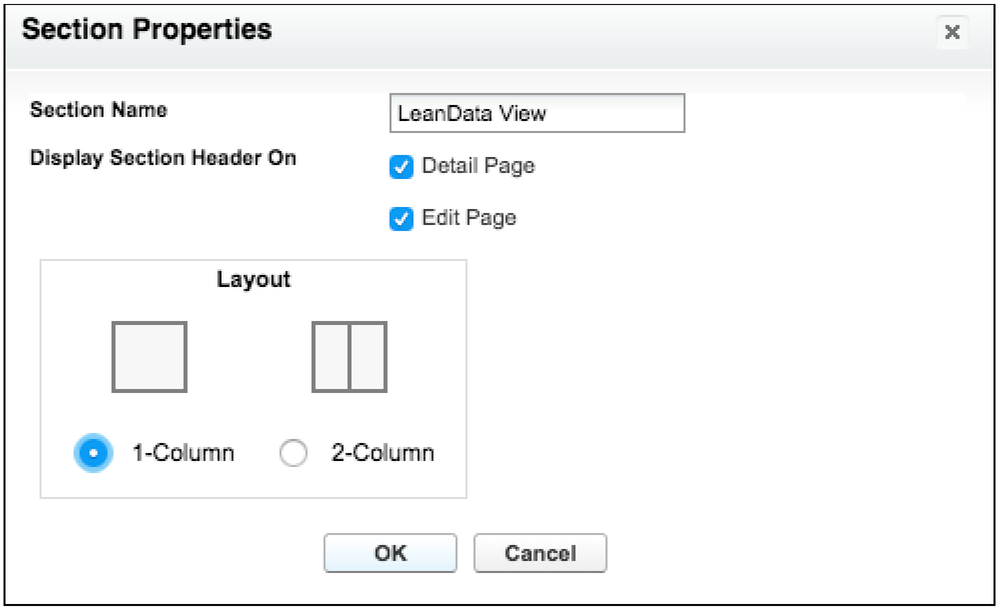
Add a Contact Page Layout

View any lead or contact duplicates.

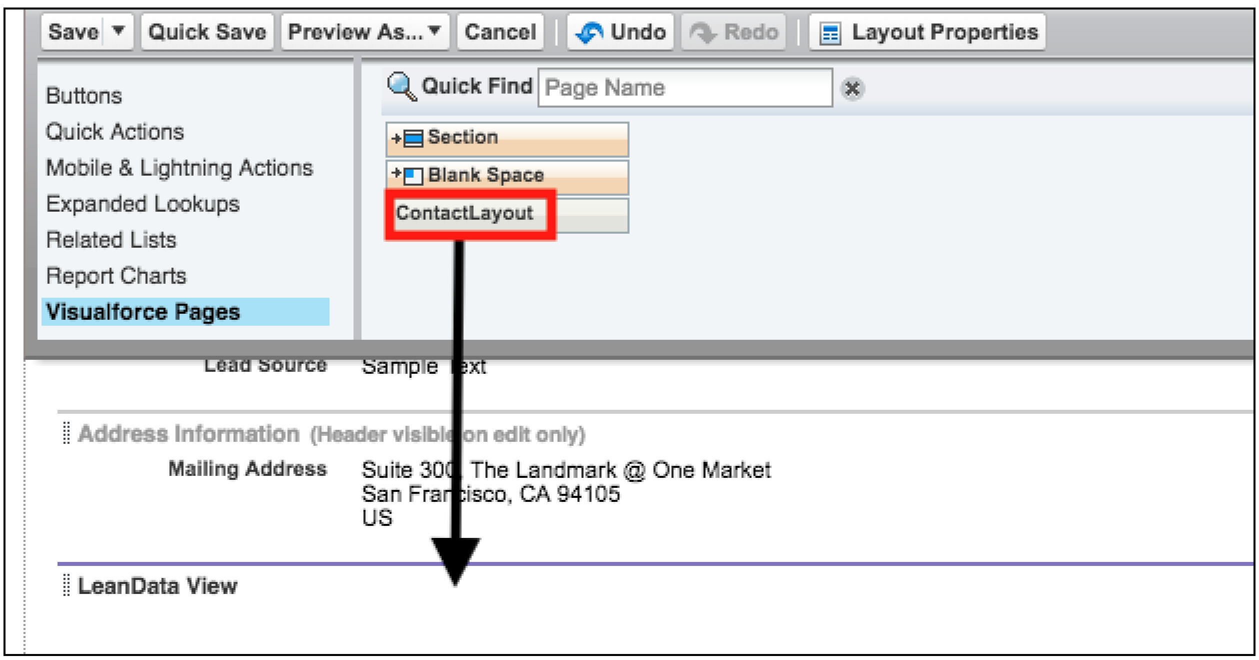
1. Within Salesforce.com Setup, go to Contacts within Object Manager
2. Click Page Layouts then select the layout you'd like to modify
3. Create a new Section by clicking and dragging down a Section from the top into the layout – you can place this new section anywhere you see a green box with a check.



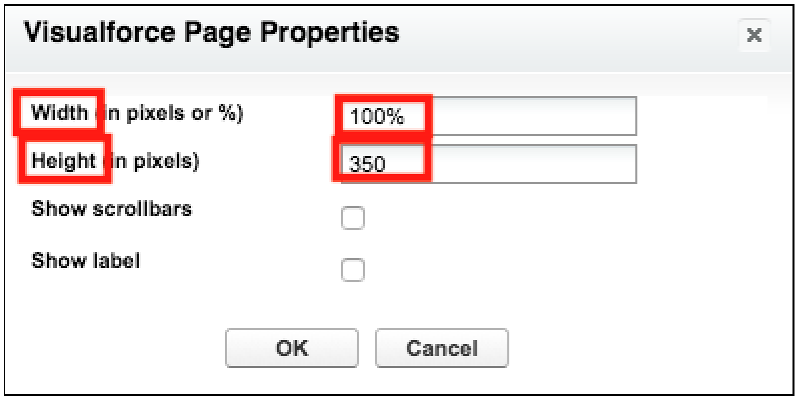
4. Name the section "LeanData" and select 1-Column



5. Within the Visualforce Pages section, click and drag “ContactLayout” into the LeanData section you just created



6. Click Properties (wrench icon) within the Visualforce page area (colored section)
7. Set the following values:

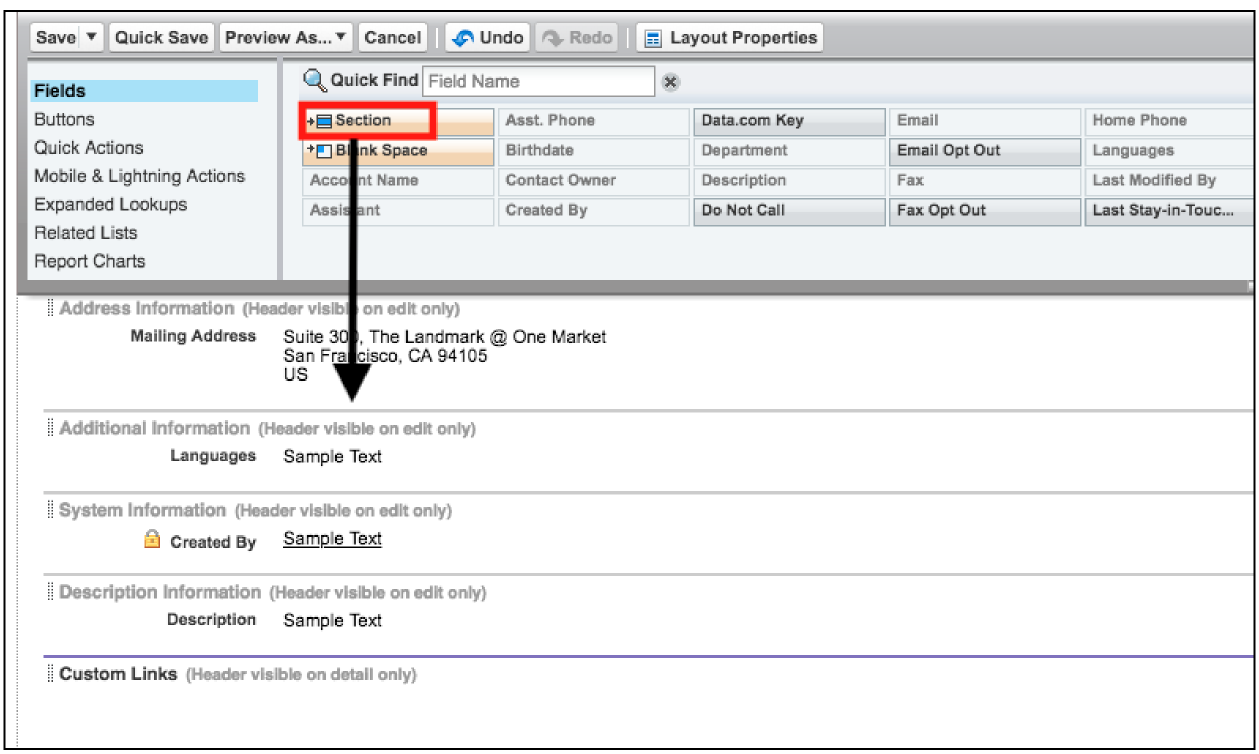


8. Click OK and Save your contact layout changes

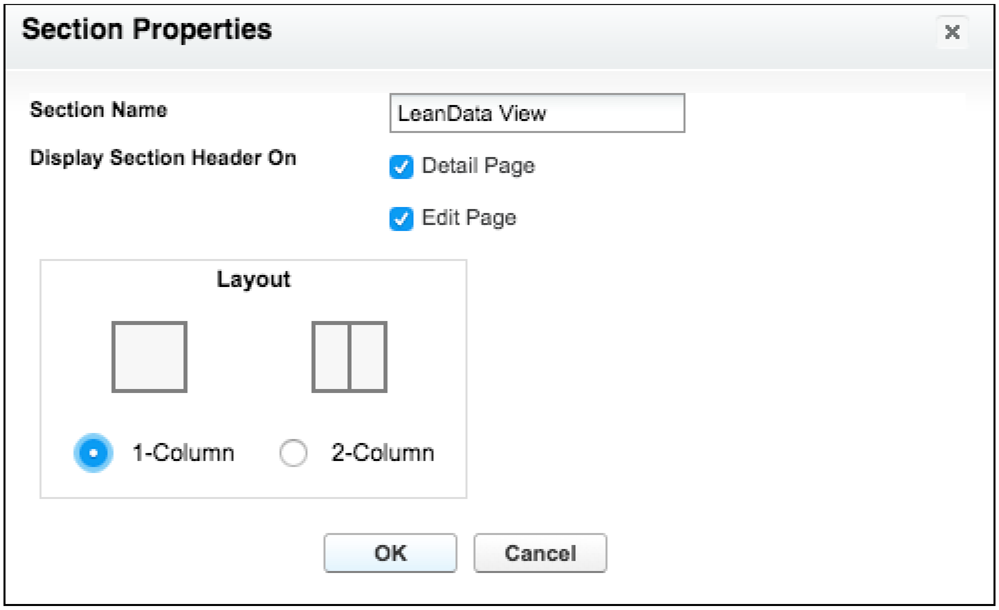
Add to Account Page Layout

View any matched accounts as well as any duplicate leads or contacts.

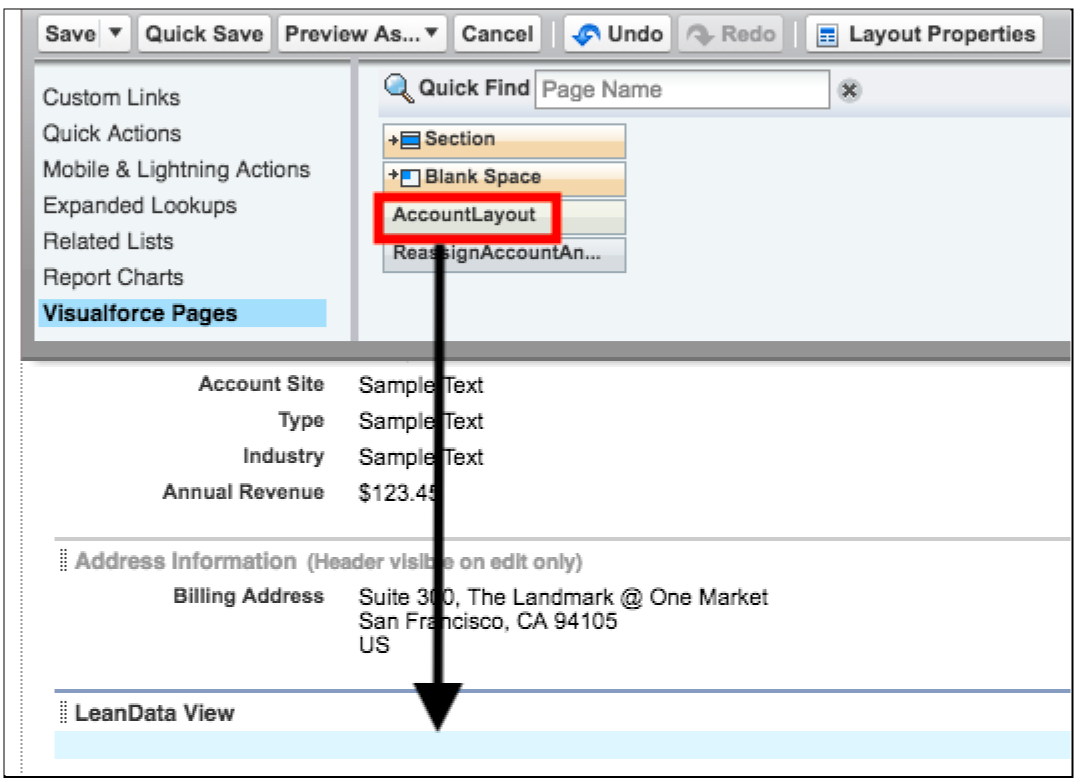
1. Within Salesforce.com Setup, go to Account within Object Manager
2. Click Page Layouts then select the layout you'd like to modify
3. Create a new Section by clicking and dragging down a Section from the top into the layout – you can place this new section anywhere you see a green box with a check



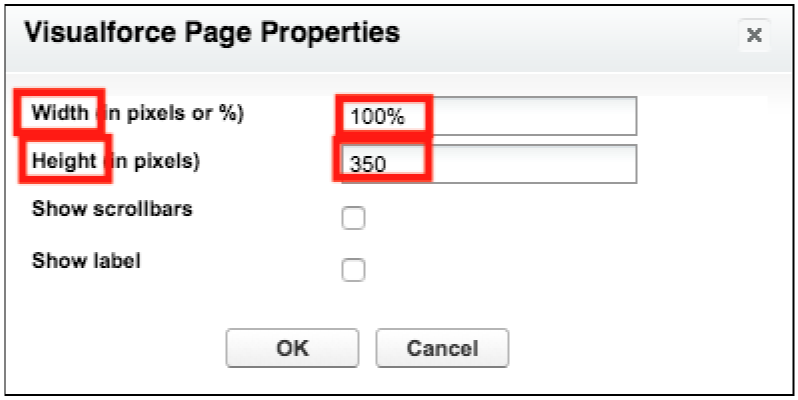
4. Name the section "LeanData" and select 1-Column



5. Within the Visualforce Pages section, click and drag AccountLayout into the LeanData section you just created



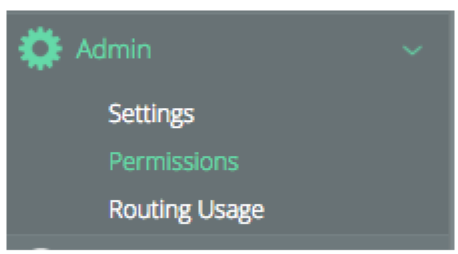
6. Click Properties (wrench icon) within the Visualforce page area (colored section)
7. Set the following values:



8. Click OK and Save your account layout changes
9. If you would like to add the View to additional account Page Layouts repeat steps 2 – 8.

Grant Users Permission To View LeanData Matches

1. Within Salesforce.com go to the LeanData App Tab
2. Click Admin → Permissions



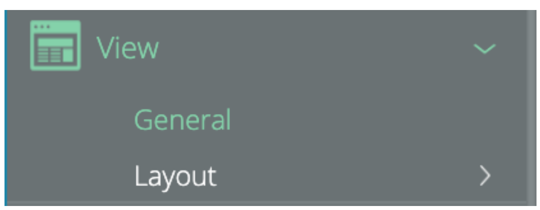
3. Assign the appropriate Permission Set to the Profiles associated with the page layouts where you've placed the LeanData View.
   - LeanData Custom Objects Read-Write
   - LeanData Custom Objects Full Access
   - LeanData Custom Objects Read Only

System Administrator	LeanData Custom Objects Full Access
Standard User	LeanData Custom Object Read Only
Read Only	LeanData Custom Object Read Only
Solution Manager	LeanData Custom Object Read Only
Marketing User	LeanData Custom Objects Full Access
Contract Manager	LeanData Custom Object Read Only
LD_Marketing	LeanData Custom Objects Full Access
LD_Sales	LeanData Custom Objects Read-Write

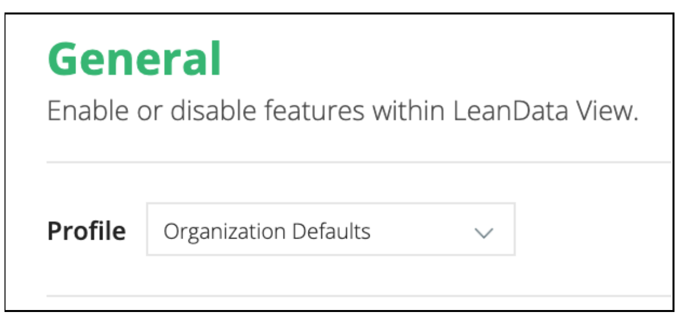
4. Click "Save Permission Set Assignments" when you are done. If you prefer, assign the Permission Set to all Profiles so the LeanData View automatically becomes visible to users once it is placed on additional layouts.

Enable View Settings

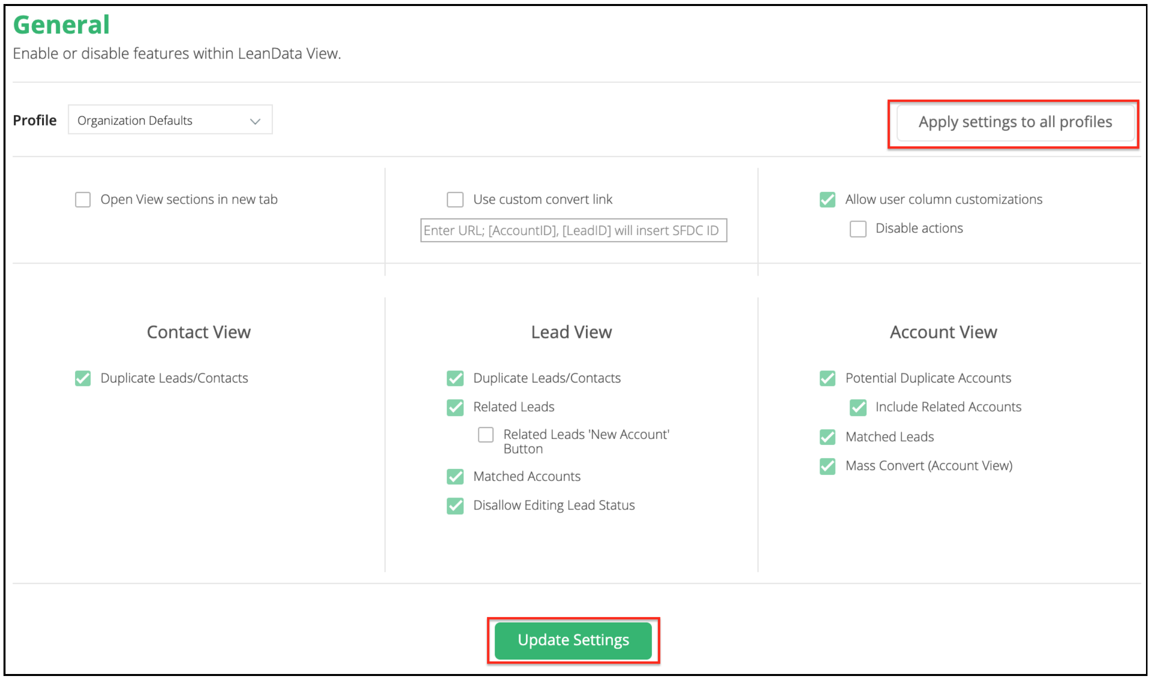
1. Navigate to the View Settings by going to the LeanData Tab → View → General



2. Select the Profile for which you would like to configure View Settings. Or leave as "Organization Defaults" to set for all profiles.



3. Select the settings you would like to apply.



4. Click “Update Settings” to apply to the selected profile, or click “Apply Settings to All Profiles” to apply to all profiles.

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 VisualForce page’s security settings to confirm that it is externally accessible
- Have the user clear their browser Cache and History
- Try different browsers

Best Practices

- When viewing any duplicates under an open Lead, Contact, or Account those with the correct permissions can “merge” the duplicate Records. You will also have to define, within your SalesForce instance, how you’d like to merge a Record. (i.e. copy information from newer duplicate Record over to oldest Record and then delete the new Record)

- You may want to remove the “Merge” or “Convert” column from users who do not have those permissions. This can be accomplished in the Layout page of the View Section in your LeanData Dashboard.

- You can customize the fields displayed on the View Section through “Lead/Contact/Account Settings” button located on the top right section of the LeanData View page.