LeanData Engagement

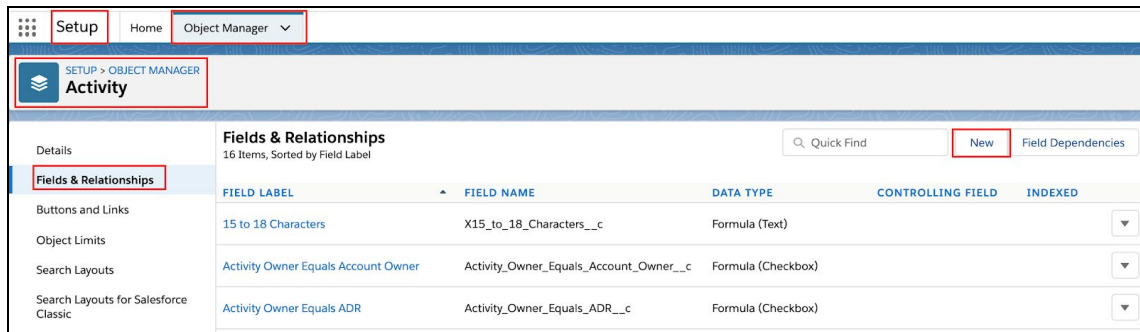## Activity Lookup Fields Install Guide

Overview

In order for LeanData Engagement to accurately capture activities and associate them with the proper Accounts, we will need to use a Lookup field on your Salesforce Activity object to store that association.

Setting Up LeanData Engagement

The following steps will guide setting up the required Lookup fields on the Activity object for LeanData Engagement. These lookup fields will allow LeanData to calculate Engagements for Activities.

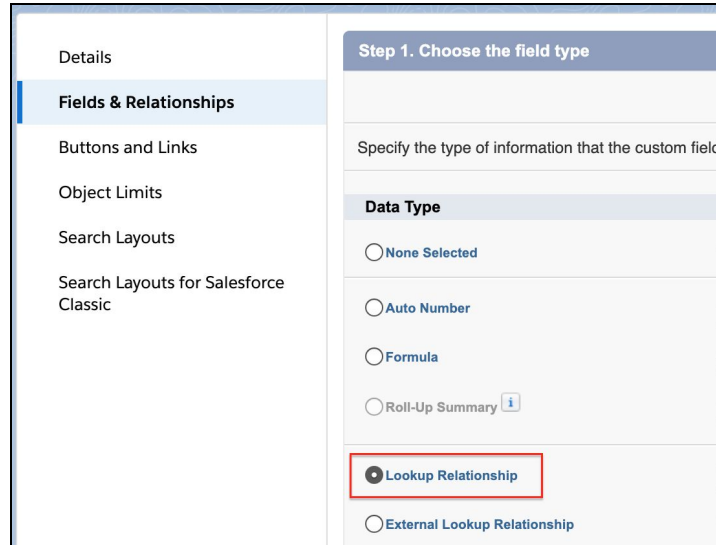## Setting Up the Lead Lookup Field on the Activity Object

1. In Salesforce Setup, navigate to the **Activity** Object within the Object Manager
2. Click **Fields & Relationships**
3. Click **New**

4. Select **Lookup Relationship**

5. Select **Lead** within the Related To dropdown

6. Name the Field Label: **Lead.** You may choose whatever you wish for the Field name and the Child Relationship Name.

Step 3. Enter the label and name for the lookup field

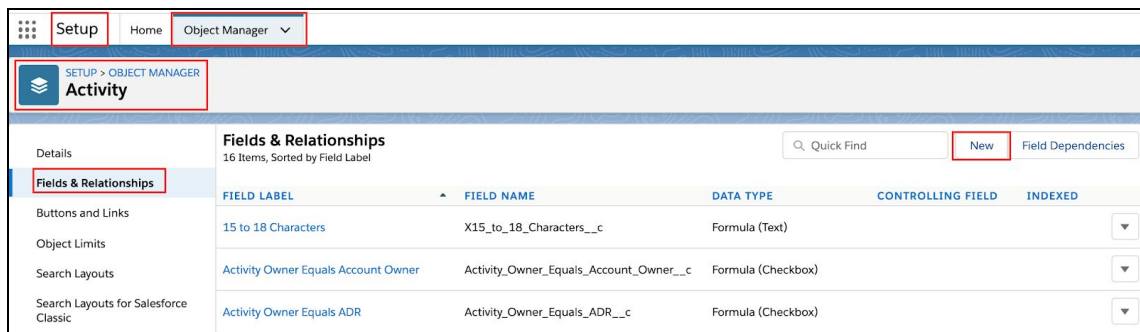|	
Field Label	Lead
Field Name	Lead
Description	
Help Text	
Child Relationship Name	Activities

7. Set **Field-Level Security** for the appropriate users. Whichever profiles will be using LeanData Engagement should be given visibility to this field.
8. Add this reference field to **Page Layouts** for Event and Task if you wish to display this field on your layouts.
9. Add to all Related Lists
10. Save
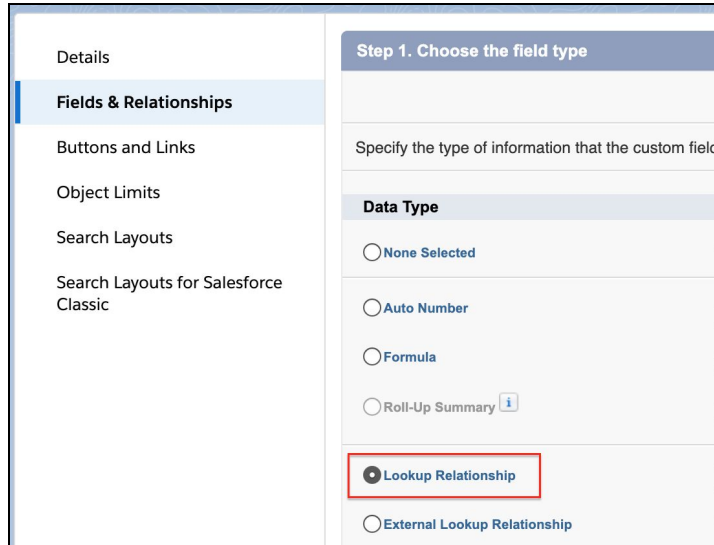
Setting Up the Contact Lookup Field on the Activity Object

1. In Salesforce Setup, navigate to the **Activity** Object within the Object Manager
2. Click **Fields & Relationships**
3. Click **New**

4. Select **Lookup Relationship**

5. Select **Contact** within the Related To dropdown

6. Name the Field Label: **Contact.** You may choose whatever you wish for the Field name and the Child Relationship Name.

Step 3. Enter the label and name for the lookup field

Field Label	Contact
Field Name	Contact
Description	
Help Text	
Child Relationship Name	Activities

7. Set **Field-Level Security** for the appropriate users. Whichever profiles will be using LeanData Engagement should be given visibility to this field.
8. Add this reference field to **Page Layouts** for Event and Task if you wish to display this field on your layouts.
9. Add to all Related Lists
10. Save