

LeanData Engagement

Activity Lookup Fields Install Guide



Overview

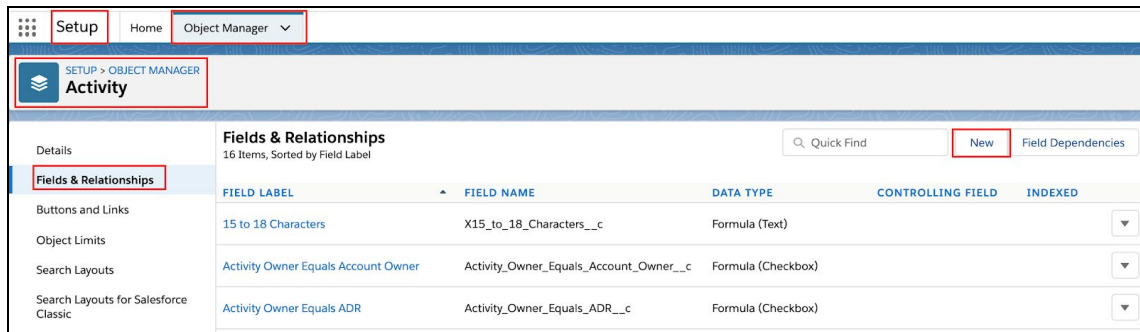
In order for LeanData Engagement to accurately capture activities and associate them with the proper Accounts, we will need to use a Lookup field on your Salesforce Activity object to store that association.

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

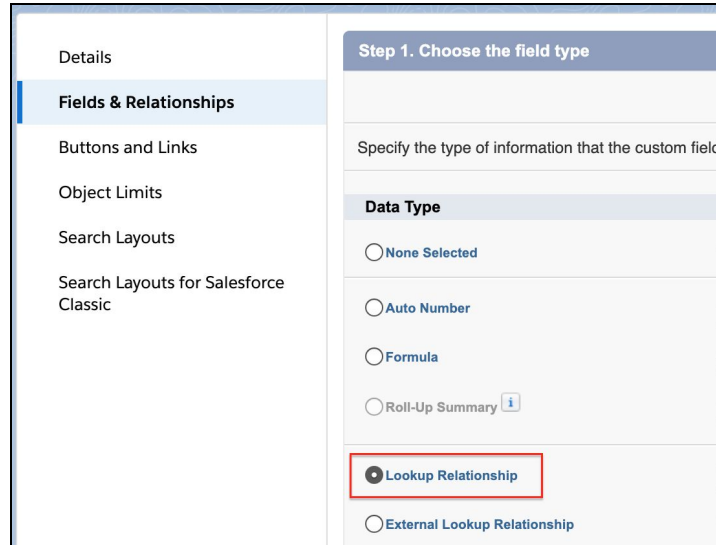
1. In Salesforce Setup, navigate to the **Activity** Object within the Object Manager
2. Click **Fields & Relationships**
3. Click **New**



The screenshot shows the Salesforce Setup interface for the Activity object. The breadcrumb trail is Setup > Object Manager > Activity. The 'Fields & Relationships' section is selected, showing a table of 16 items. A 'New' button is visible in the top right of the table area.

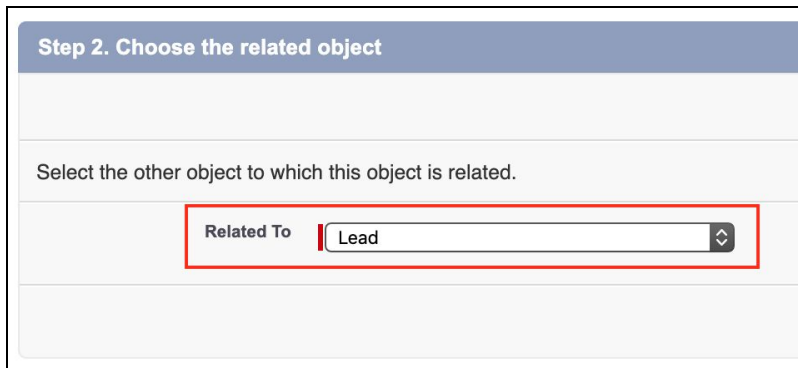
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
15 to 18 Characters	X15_to_18_Characters__c	Formula (Text)		▼
Activity Owner Equals Account Owner	Activity_Owner_Equals_Account_Owner__c	Formula (Checkbox)		▼
Activity Owner Equals ADR	Activity_Owner_Equals_ADR__c	Formula (Checkbox)		▼

4. Select **Lookup Relationship**



The screenshot shows a configuration page for a custom field. On the left is a navigation menu with options: Details, Fields & Relationships (highlighted), Buttons and Links, Object Limits, Search Layouts, and Search Layouts for Salesforce Classic. The main content area is titled "Step 1. Choose the field type" and contains the instruction "Specify the type of information that the custom field". Under the "Data Type" section, there are five radio button options: "None Selected", "Auto Number", "Formula", "Roll-Up Summary" (with an info icon), and "Lookup Relationship" (which is selected and highlighted with a red box). Below it is the "External Lookup Relationship" option.

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



The screenshot shows a configuration page titled "Step 2. Choose the related object". It contains the instruction "Select the other object to which this object is related." Below this is a dropdown menu labeled "Related To" with "Lead" selected. The dropdown menu is highlighted with a red box.

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 ⓘ

Field Name ⓘ

Description

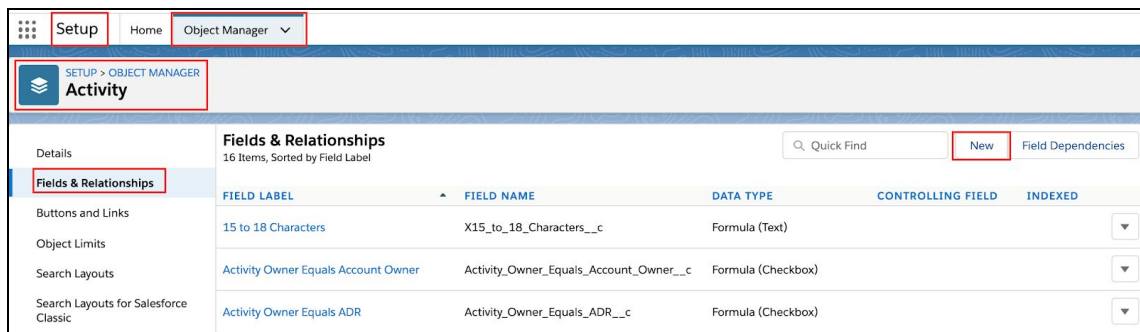
Help Text

Child Relationship Name ⓘ

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

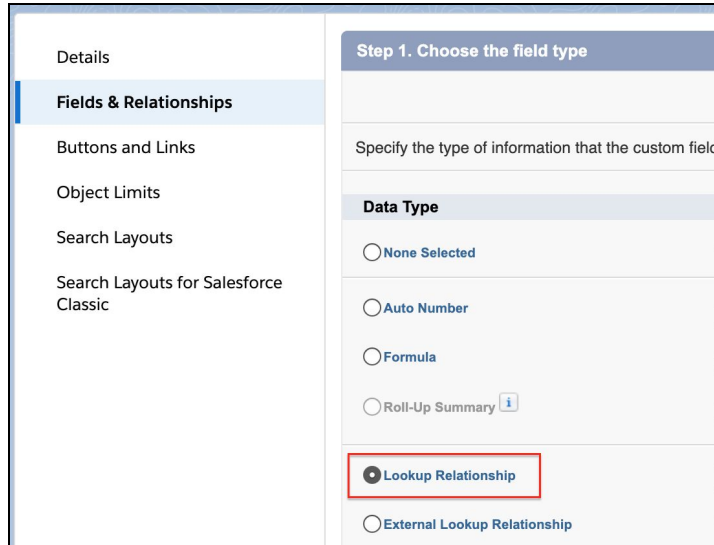
1. In Salesforce Setup, navigate to the **Activity** Object within the Object Manager
2. Click **Fields & Relationships**
3. Click **New**



The screenshot shows the Salesforce Setup interface for the Activity object. The 'Fields & Relationships' section is active, displaying a table of existing fields. A 'New' button is highlighted in the top right corner of the table area.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
15 to 18 Characters	X15_to_18_Characters__c	Formula (Text)		▼
Activity Owner Equals Account Owner	Activity_Owner_Equals_Account_Owner__c	Formula (Checkbox)		▼
Activity Owner Equals ADR	Activity_Owner_Equals_ADR__c	Formula (Checkbox)		▼

4. Select **Lookup Relationship**



The screenshot shows the 'Step 1. Choose the field type' configuration page in Salesforce. On the left is a navigation menu with options: Details, Fields & Relationships (highlighted), Buttons and Links, Object Limits, Search Layouts, and Search Layouts for Salesforce Classic. The main content area is titled 'Step 1. Choose the field type' and contains the instruction 'Specify the type of information that the custom field'. Under the 'Data Type' section, there are radio button options: None Selected, Auto Number, Formula, Roll-Up Summary (with an info icon), **Lookup Relationship** (highlighted with a red box), and External Lookup Relationship.

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



The screenshot shows the 'Step 2. Choose the related object' configuration page in Salesforce. The page title is 'Step 2. Choose the related object'. Below the title is the instruction 'Select the other object to which this object is related.'. A dropdown menu labeled 'Related To' is shown with 'Contact' selected and highlighted by a red box.

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	<input type="text" value="Contact"/>	i
Field Name	<input type="text" value="Contact"/>	i
Description	<input type="text"/>	
Help Text	<input type="text"/>	
Child Relationship Name	<input type="text" value="Activities"/>	i

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