LeanData Engagement
Overview

Overview

LeanData Engagement allows you to measure the Sales and Marketing activity against the Accounts in your Salesforce Database.

The following guide contains a high level overview of definitions, standard reports, standard dashboards, the custom Engagement (LDAN__LD_Engagement__c) object, and the Account Metric (LDAN__Account_Metric__c) object in the LeanData Engagement managed package.

Field Definitions

LeanData Engagement Object Fields

The following describes the fields that are available on the custom Engagement object (LDAN__LD_Engagement__c).

Each entry in the Engagement object represents a relevant marketing or sales engagement as defined through your LeanData Engagement product settings. Utilizing LeanData's best in class Matching, both Contacts AND Leads (Campaign Members) are considered when identifying relevant marketing engagements.The Engagement object also captures all relevant sales engagements by tracking Tasks and Events posted against your Contacts and Leads.

- **Account**
    - **API name:** LDAN__Account__c
    - **Type:** Lookup(Account)
    - **Description:** Reference field to the matched Account associated with the Campaign member, Lead, or Contact.
- **LD Account Metric**
    - **API name:** LDAN__LD_Account_Metric__c
    - **Type:** Lookup(Account Metric)
    - **Description:** Reference field to the Account Metric object (Account rollup object).
- **Account Mismatch**
    - **API name:** LDAN__Account_Mismatch__c
    - **Type:** Formula(Checkbox)
    - **Description:** Tracks whether a Lead's matched Account changes. If a Lead's matched Account changes, then this engagement is recalculated for the new Account.
- **Activity Id**
    - **API name:** LDAN__Activity_Id__c
    - **Type:** Text(255)
    - **Description:** Unique identification code associated with the sales activity.
- **Activity Owner**

- **API name:** LDAN__Activity_Owner__c
- **Type:** Lookup(User)
- **Description:** The User who drove the sales activity.
- **Activity Status**
  - **API name:** LDAN__Activity_Status__c
  - **Type:** Text(255)
  - **Description:** Status of the sales activity (Task/Event).
- **Activity Subject**
  - **API name:** LDAN__Activity_Subject__c
  - **Type:** Long Text Area(131072)
  - **Description:** Subject of the sales activity (i.e., subject of an email).
- **Activity Type**
  - **API name:** LDAN__Activity_Type__c
  - **Type:** Text(255)
  - **Description:** Task Type or Event Type (e.g, email, call, etc).
- **Campaign**
  - **API name:** LDAN__Campaign__c
  - **Type:** Lookup(Campaign)
  - **Description:** Campaign Name. Reference to the associated marketing Campaign.
- **Campaign Member Id**
  - **API name:** LDAN__Campaign_Member_Id__c
  - **Type:** Text(255)
  - **Description:** Campaign Member ID of the Campaign member.
- **Campaign Member Status**
  - **API name:** LDAN__Campaign_Member_Status__c
  - **Type:** Text(255)
  - **Description:** Campaign member status of the Campaign member engagement.
- **Contact**
  - **API name:** LDAN__Contact__c
  - **Type:** Lookup(Contact)
  - **Description:** Reference ID of the associated Contact if the Campaign member is a Contact. Value is blank if the Campaign member is a Lead.
- **Engagement Date**
  - **API name:** LDAN__Engagement_Date__c
  - **Type:** Date/Time
  - **Description:** The date of engagement. This is the same as Activity Date or Campaign Member Created Date depending on whether the engagement is a Marketing or Sales one.
- **Engagement Link**
  - **API name:** LDAN__Engagement_Link__c
  - **Type:** URL(255)

- ○ **Description:** Url to Campaign member or activity.
- **Engagement Person Type**
  - ○ **API name:** LDAN__Engagement_Person_Type__c
  - ○ **Type:** Text(255)
  - ○ **Description:** Records whether the engaged party is a Lead or Contact.
- **Engagement Object Type**
  - ○ **API name:** LDAN__Engagement_Object_Type__c
  - ○ **Type:** Text(255)
  - ○ **Description:** Records whether the sales engagement was a Task, Activity, or Campaign.
- **Engagement Type**
  - ○ **API name:** LDAN__Engagement_Type__c
  - ○ **Type:** Picklist
  - ○ **Description:** Type of engagement either it be Sales or Marketing.
- **Engagement Unique Id**
  - ○ **API name:** LDAN__Engagement_Unique_Id__c
  - ○ **Type:** Text(255) (External ID)
  - ○ **Description:** Unique Id for engagement.
- **Lead**
  - ○ **API name:** LDAN__Lead__c
  - ○ **Type:** Lookup(Lead)
  - ○ **Description:** Reference ID of the associated Lead if the Campaign member is a Lead. Value is blank if the Campaign member is a Contact.
- **Sales Followed Up**
  - ○ **API name:** LDAN__Sales_Followed_Up__c
  - ○ **Type:** Formula(Checkbox)
  - ○ **Description:** Designates whether this Campaign Member had a Sales follow-up after this Engagement.
- **Unprocessed**
  - ○ **API name:** LDAN__Unprocessed__c
  - ○ **Type:** Checkbox
  - ○ **Description:** Designates to Processing Batch (Engagement batch) whether record needs to be processed again. This flag is raised pending changes to the Engagement record.
- **DML Error**
  - ○ **API name:** LDAN__DML_Error__c
  - ○ **Type:** Text(255)
  - ○ **Description:** Captures any DML Errors on the Engagement.

Analytics Setting Object Fields

The following describes the fields that are available on the custom Analytics Setting object (LDAN__Analytics_Setting__c).

The Analytics Setting object is used to store all the settings that have been selected for Engagement runs via the Engagement Settings page. Please do not modify this object as it is required for Engagement to run.

- **Setting Name**
  - **API name:** LDAN__Setting_Name__c
  - **Type:** Text(128)
  - **Description:** Refers to the name of the setting.
- **Category**
  - **API name:** LDAN__Category__c
  - **Type:** Text(128)
  - **Description:** Refers to the category of setting.
- **Labels**
  - **API name:** LDAN__Labels__c
  - **Type:** Long Text Area(131072)
  - **Description:** Carryover for the Category field.
- **Product**
  - **API name:** LDAN__Product__c
  - **Type:** Text(128)
  - **Description:** Refers to the LeanData product for which the settings are being saved (e.g., Engagement, Attribution).
- **Setting Key**
  - **API name:** LDAN__Setting_Key__c
  - **Type:** Text(128)
  - **Description:** Internal setting useful for upserts.
- **Truncated Value**
  - **API name:** LDAN__Value__c
  - **Type:** Long Text Area(131072)
  - **Description:** Internal setting useful for filtering.
- **Value**
  - **API name:** LDAN__Value__c
  - **Type:** Long Text Area(131072)
  - **Description:** Value of the selected setting
- **Value 2**
  - **API name:** LDAN__Value_2__c
  - **Type:** Long Text Area(131072)
  - **Description:** Carryover for the Value field.

- **Segment**
  - **API name:** LDAN__Segment__c
  - **Type:** Text(128)
  - **Description:** Name of Attribution Segment. Not active within Engagement product.

Account Metric Object Fields

The following describes the fields that are available on the custom Account Intelligence Metric object (LDAN__LD_Account_Metric__c).

The Account Metric object serves as an Account rollup object that records all relevant sales and marketing engagement information at the Account level. The Account Metric object includes information on an Account's first, last, and total sales and/or marketing engagement/date. Additionally, this object records the number of days since a sales or marketing engagement for an Account.

- **Account**
  - **API name:** LDAN__Account__c
  - **Type:** Lookup(Account)
  - **Description:** Reference field to the matched Account.
- **Account External Id**
  - **API name:** LDAN__Account_External_Id__c
  - **Type:** Text(255) (External ID)
  - **Description:** External ID associated with the Account.
- **Days Since Last Marketing Engagement**
  - **API name:** LDAN__Days_Since_Last_Marketing_Engagement__c
  - **Type:** Formula(Number)
  - **Description:** Calculate how many days have elapsed since last marketing engagement on the Account.
- **Days Since Last Sales Engagement**
  - **API name:** LDAN__Days_Since_Last_Sales_Engagement__c
  - **Type:** Formula(Number)
  - **Description:** Calculate how many days have elapsed since last sales engagement on the Account.
- **First Engagement**
  - **API name:** LDAN__First_Engagement__c
  - **Type:** Lookup(LD Engagement)
  - **Description:** Name of the first engagement on Account.
- **First Engagement Date**
  - **API name:** LDAN__First_Engagement_Date__c
  - **Type:** Formula(Date/Time)

- - **Description:** Date of first engagement on Account.
- **First Marketing Engagement**
  - **API name:** LDAN__First_Marketing_Engagement__c
  - **Type:** Lookup(LD Engagement)
  - **Description:** Name of first marketing engagement on Account.
- **First Marketing Engagement Date**
  - **API name:** LDAN__First_Marketing_Engagement_Date__c
  - **Type:** Formula(Date/Time)
  - **Description:** Date of first marketing engagement on Account.
- **First Sales Engagement**
  - **API name:** LDAN__First_Sales_Engagement__c
  - **Type:** Lookup(LD Engagement)
  - **Description:** Name of first sales engagement on Account.
- **First Sales Engagement Date**
  - **API name:** LDAN__First_Sales_Engagement_Date__c
  - **Type:** Formula(Date/Time)
  - **Description:** Date of first sales engagement on Account.
- **Last Engagement**
  - **API name:** LDAN__Last_Engagement__c
  - **Type:** Lookup(LD Engagement)
  - **Description:** Name of last engagement on Account.
- **Last Engagement Date**
  - **API name:** LDAN__Last_Engagement_Date__c
  - **Type:** Formula(Date/Time)
  - **Description:** Date of last engagement on Account.
- **Last Marketing Engagement**
  - **API name:** LDAN__Last_Marketing_Engagement__c
  - **Type:** Lookup(LD Engagement)
  - **Description:** Name of last marketing engagement on Account.
- **Last Marketing Engagement Date**
  - **API name:** LDAN__Last_Marketing_Engagement_Date__c
  - **Type:** Formula(Date/Time)
  - **Description:** Date of last marketing engagement on Account.
- **Last Sales Engagement**
  - **API name:** LDAN__Last_Sales_Engagement__c
  - **Type:** Lookup(LD Engagement)
  - **Description:** Name of last sales engagement on Account.
- **Last Sales Engagement Date**
  - **API name:** LDAN__First_Sales_Engagement_Date__c
  - **Type:** Formula(Date/Time)
  - **Description:** Date of last sales engagement on Account.
- **Total Engagements**

- ○ **API name:** LDAN__Total_Engagements__c
- ○ **Type:** Formula(Number)
- ○ **Description:** Total number of engagements on Account.
- **Total Marketing Engagements**
  - ○ **API name:** LDAN__Total_Marketing_Engagements__c
  - ○ **Type:** Number(18,0)
  - ○ **Description:** Total number of marketing engagements on Account.
- **Total Sales Engagements**
  - ○ **API name:** LDAN__Total_Sales_Engagements__c
  - ○ **Type:** Number(18,0)
  - ○ **Description:** Total number of sales engagements on Account.
- **Unprocessed**
  - ○ **API name:** LDAN__Unprocessed__c
  - ○ **Type:** Checkbox
  - ○ **Description:** Denotes to AM batch to process Account Metrics objects.
- **Total Engaged Contacts**
  - ○ **API name:** LDAN__Total_Engaged_Contacts__c
  - ○ **Type:** Number(18,0)
  - ○ **Description:** Total number of engaged Contacts on an Account.
- **Total Engaged Leads**
  - ○ **API name:** LDAN__Total_Engaged_Leads__c
  - ○ **Type:** Number(18,0)
  - ○ **Description:** Total number of engaged Leads on an Account.
- **Total Engaged Contacts and Leads**
  - ○ **API name:** LDAN__Total_Engaged_Contacts_and_Leads__c
  - ○ **Type:** Number(18,0)
  - ○ **Description:** Total number of engaged Contacts and Leads on an Account.

Activity (Tasks & Events) Object Fields

Application Fields

The following fields can be used for reporting or operational purposes. These fields are only applicable for customers who are subscribed to LeanData Engagement.

| Field	Purpose	API Name
LD Engagement	Used for Engagement: Displays Engagement associated with activity	LD_Engagement__c

Campaign Member Object Fields

Application Fields

The following fields can be used for reporting or operational purposes. These fields are only applicable for customers who are subscribed to LeanData Engagement.

Field	Purpose	API Name
LD Engagement	Used for Engagement: Links the Campaign Member to the Sales or Marketing Engagement	LD_Engagement__c

Entity Relationship Diagram
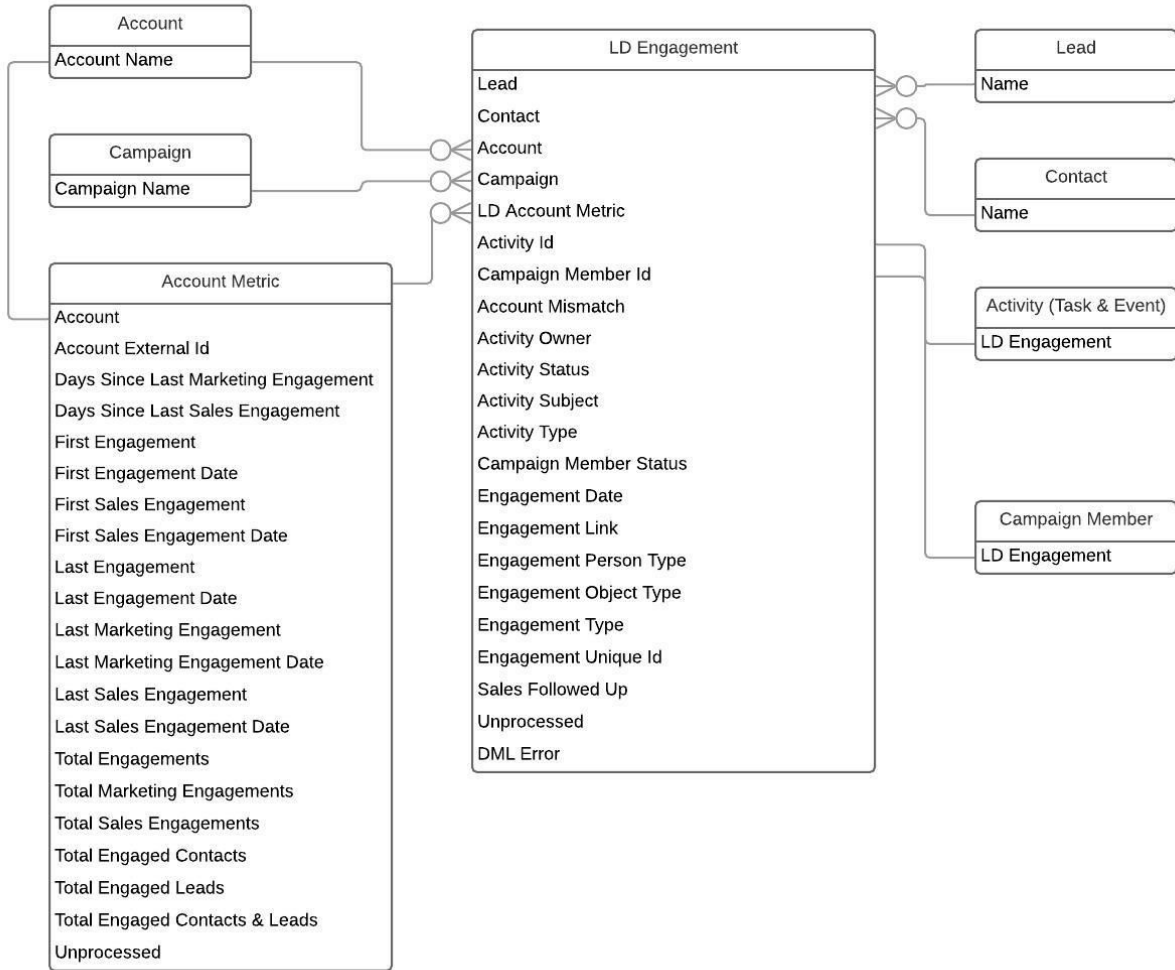
Apex Batches

The following describes the Engagement batches and their modes.

Batches

- **Eng_ProcessingBatch**: Creates / Deletes Engagements
- **Eng_MetricsBatch**: Creates / Updates Account Metrics Objects

Modes

Eng_ProcessingBatch has eight modes which handle creation and deletion of Engagements in their respective space. Depending on your Engagement settings, a subset of the modes below will run.

- **Task & Event Backfill**
  - Populates Lead/Contact lookup on all Activity records retroactively.
- **Mismatched Account**
  - Deletes Engagements for re-parented Leads, so they can be re-created in the processing batch.
- **Campaign Member Processing**
  - Creates and deletes Marketing engagements based on Engagement filters.
- **Marketing Engagement Update**
  - Updates any fields on Engagement that might have changed since the previous run.
- **Marketing Engagement Deletion**
  - Deletes all Marketing Engagement, normally used when Marketing Engagement is turned off.
- **Task & Event Processing**
  - Creates and deletes Sales Engagement based on Engagement filters.
- **Sales Engagement Update**
  - Updates all pull down fields from the Activity object to the Engagement object.
- **Sales Engagement Deletion**
  - Deletes all Sales Engagement, normally used when Sales Engagement is turned off.

Eng_MetricsBatch has four modes that handles the creation and updating of Account Metric records. Depending on your settings, a subset of the below modes will run.

- **AM Processing**
  - Uses aggregate query to populate AM summary fields, processes all AMs with Unprocessed__c = true + deletes AMs for Accounts that have been deleted.
- **AM Retroactive**
  - Creates AM for all Accounts, uses aggregate query to populate AM summary fields, normally runs one time when AM is turned on.
- **AM Deletion**
  - Deletes all AMs, runs one time when AM is turned off.

Triggers & Permissions

The following describes the triggers and permissions in the LeanData Engagement package.

Engagement Triggers

For Engagement, the package utilizes triggers on the Campaign Member, Task, and Event objects to assist query optimization for the Eng_ProcessingBatch. The Campaign Member trigger (Eng_CampaignMemberTrigger) allows LeanData to create Marketing Engagements. The Events & Tasks triggers (Eng_EventTrigger & Eng_TaskTrigger) populate User-designated fields on Events & Tasks with the name of the appropriate Lead or Contact via a lookup relationship.

These triggers need to be added manually to the LD Trigger Controller. Please refer to the [LeanData Engagement - Install Guide](#) for instructions on how to enable these.

Once the Event and Task triggers have been added, the User needs to designate the fields on Task and Event that either have an existing Lead or Contact Lookup or require LeanData to populate with Lead or Contact. For the latter option, this would require the User to create fields on Task / Event for LeanData to populate. This designation can be done within the Engagement Settings page within the LeanData app. Please refer to the [LeanData Engagement - Activity Lookup Fields Install Guide](#) for instructions on how to add these.

If you already have Lead and/or Contact Lookups on Tasks and Events and would like to use LeanData to populate those lookups, you can enable the appropriate triggers via the **Event and Task Autopopulation** section within the **Sales Engagement** page in **Engagement Settings**. These triggers can also be disabled if you do NOT want to use LeanData to populate these lookups.

In both the above scenarios, the triggers must be added in your Salesforce Custom Settings before the corresponding trigger setting can be enabled via the LeanData Engagement Settings.

Permissions

There are two permission sets as part of the Engagement product:

- **LeanData Engagement Read-Only**
- **LeanData Engagement Read-Write**

Please make sure that your Users have access to at least the **LeanData Analytics Read-Only** permission set to be able to view the Account & Campaign visualizations and the underlying data on the Engagement and Account Metrics objects. **LeanData Analytics Read-Write** permissions are required to configure and change your LeanData Engagement Settings.