LeanData Engagement

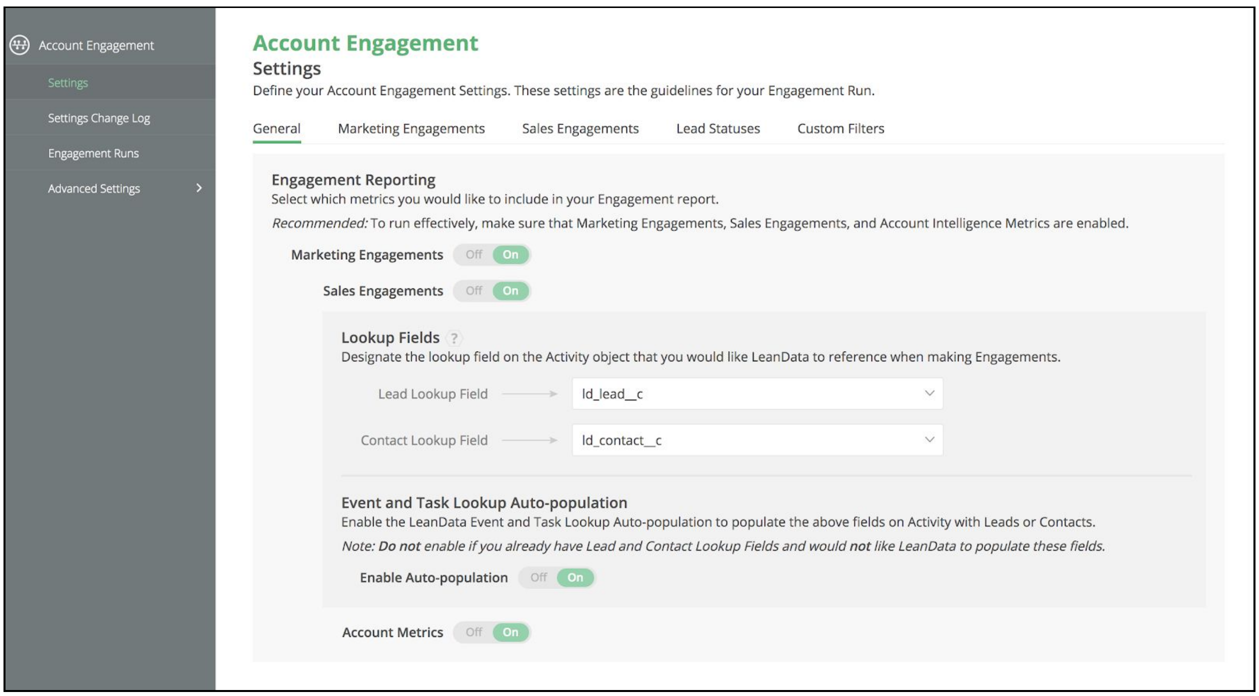
Settings Walkthrough

Overview

The following guide is a detailed walkthrough of LeanData Engagement Settings. For detailed information on the LeanData Engagement Product, including report and object breakdowns, please reference the [LeanData Engagement Overview]() guide.

LeanData Engagement Settings Page

General Tab



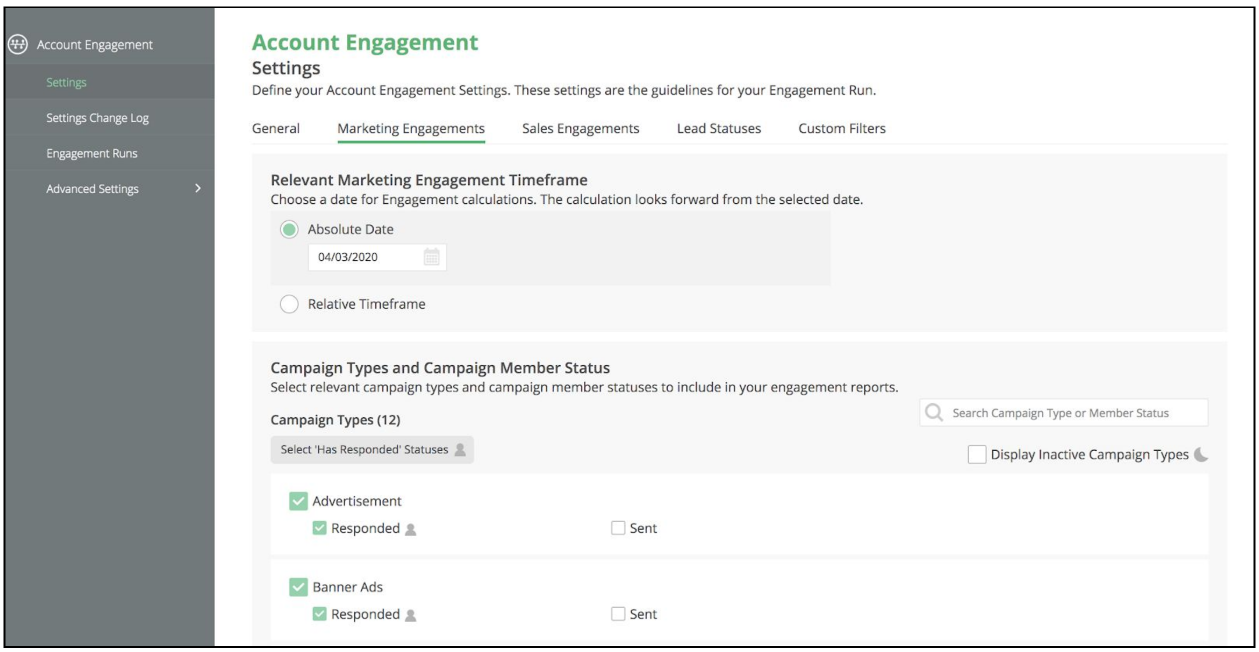
From the main **Settings** page in LeanData Engagement, you can designate whether you want to include Marketing Engagements, Sales Engagements, or both in your Engagement Runs. Additionally, you can decide to include Account Metrics in your runs.

Account Metrics is a custom roll-up object that is a one to one lookup to the Account object. It includes Account-level metrics such as Total Engagements, Days Since Last Marketing Engagement, etc.

Enabling Marketing Engagements, Sales Engagements, and Account Metrics is required for LeanData Engagement to run effectively. If any of them are turned off, a modal will appear asking whether you would like to delete all of your Sales Engagements, Marketing Engagements, or Account Metrics data. You can choose not to delete this data while still disabling the Engagement / Account Metrics objects. This option allows you to re-enable the Engagement / Account Metrics objects at a later state while preserving your data in these objects.

Within the **Sales Engagements tab**, there is a Lookup Field section. In order to create Sales Engagements, LeanData requires lookups on the Activity object to both the Contact and Lead objects. This allows for the Engagement run to quickly associate an Activity to the correct Lead or Contact. Additionally, there is an option to allow LeanData to **Enable Auto-population**. By allowing LeanData to maintain these fields, we will always ensure that the right Lead or Contact is associated with an Activity. This is important , particularly in the cases of a Lead being converted into a Contact.

Marketing Engagements Tab



Within the **Marketing Engagements tab**, you can select the time period for which you would like Engagement to be calculated. The time frame can either be set as a number of days from today (**Relevant Time Window**) or from a particular date forward (**Absolute Date**). LeanData will then only include Marketing Engagements with a Campaign Member Created Date within this timeframe.

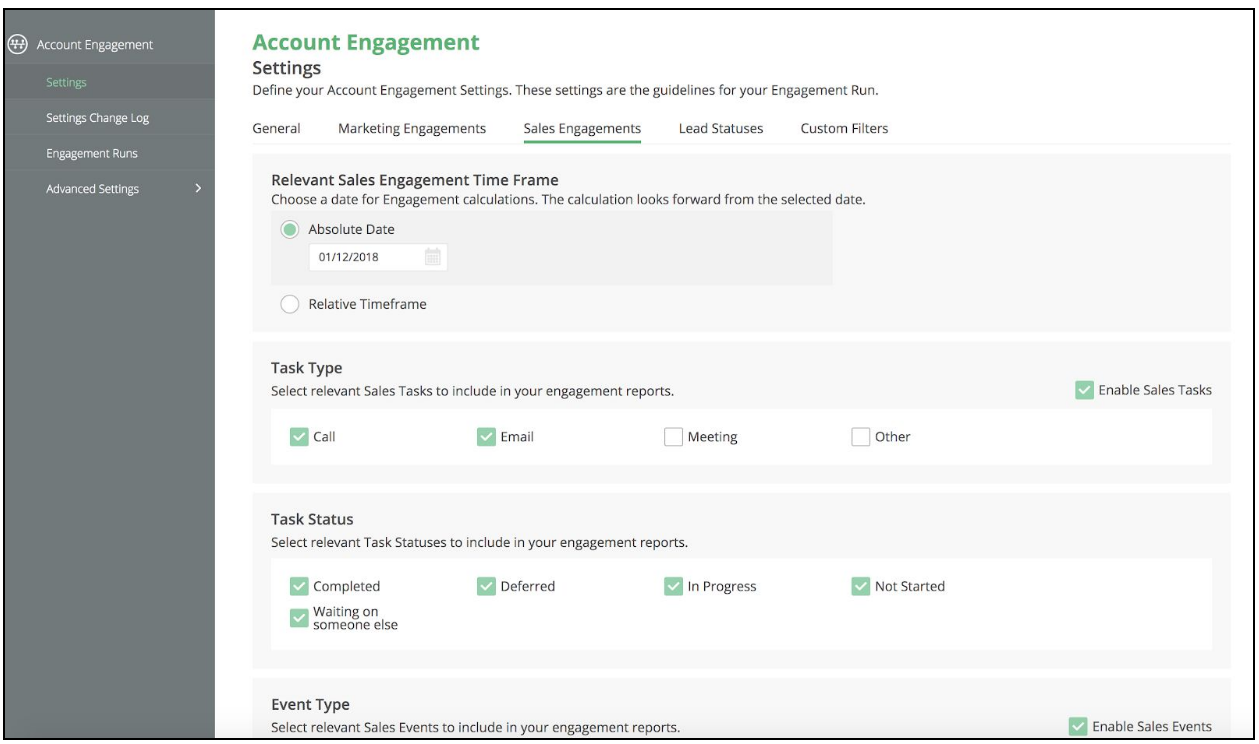
Additionally, in the **Campaign Types and Campaign Member Status** section of this page, you can select which Campaign Types and Campaign Member Statuses should be included in the Engagement calculation. These types and member status are dynamically pulled from your Salesforce instance and includes custom Types and Member Statuses. You can also choose to display and include inactive Campaign Types.

Keep in mind that selecting Campaign Types and Campaign Member Statuses **includes** them in the Engagement run. If values are not selected, then they will not be considered in the calculations. New Campaign Types and Campaign Member Statuses will not be automatically included in Engagement. You will have to manually select those Types and Statuses before they will be considered in the calculations.

The **Marketing Engagements tab** allows you to automatically **Select 'Has Responded' Statuses** with a click of a button. This will automatically select Statuses that have been designated with the "Responded" checkbox in your Salesforce instance . If this option is selected, Marketing Engagements will only be created depending on the Responded Campaign Member Statuses for a Campaign.

Please note: When you are finished with your changes, don't forget to hit **Save** in the green header bar.

Sales Engagements Tab



Within the **Sales Engagements tab**, you can select the time period for which would like Engagement to be calculated. The time frame can either be set as a number of days from today (**Relevant Time Window**) or from a particular date forward (**Absolute Date**). LeanData will then only include Sales Engagements where the Activity's Created Date is within this timeframe.

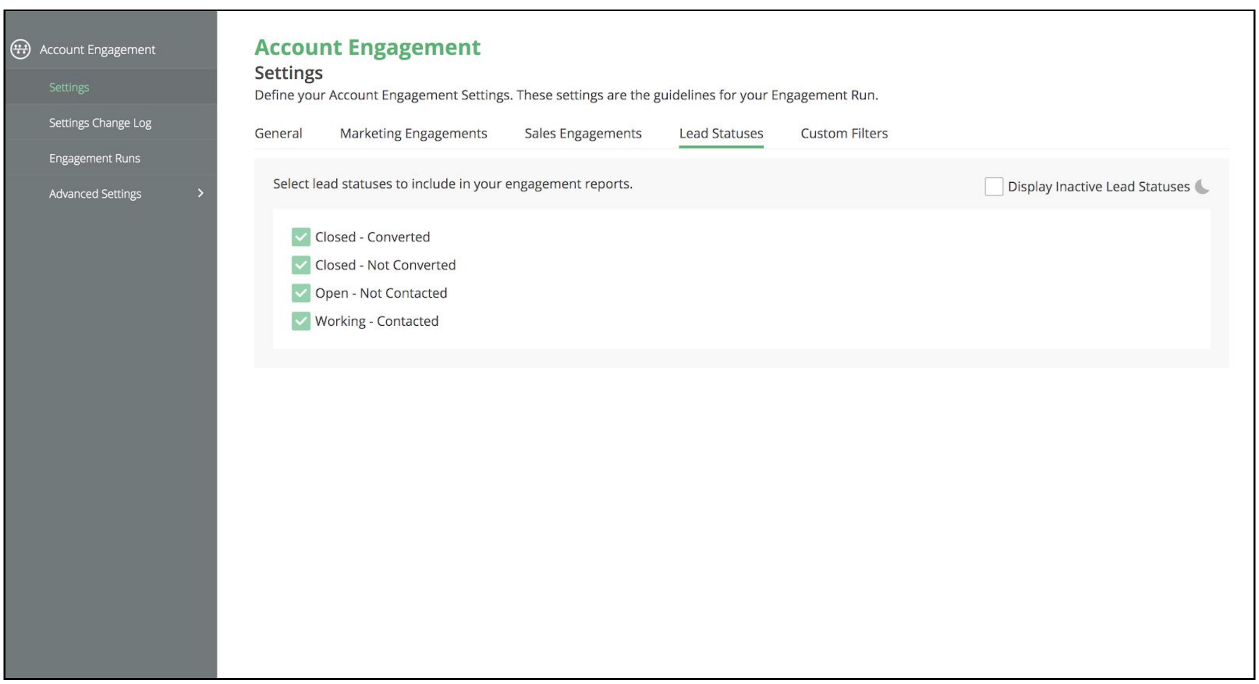
Sales Tasks and Events can be toggled using the **Enable Sales Tasks** and **Enable Sales Events** checkboxes. If either of these checkboxes is disabled, then the Engagement calculation will not consider them as Sales Engagements.

After deciding whether to include Tasks and/or Events, you can then select which Task Types, Task Statuses, and Event Types should be included in the Engagement calculation. These Types and Statuses are dynamically pulled from your Salesforce instance and includes custom Types and Statuses.

Keep in mind that selecting Task Types, Task Statuses, and Event Types **includes** them in the Engagement run. If values are not selected, they will not be considered in the calculations. New Task Types, Task Statuses, and Event Types will not be automatically included in Engagement. You will have to manually select those Types and Statuses in the LeanData app.

Please note: When you are finished with your changes, don't forget to hit **Save** in the green header bar.

Lead Statuses



Use the **Lead Statuses tab** to designate which Lead Statuses should be included in the Engagement calculation. The Lead Statuses shown in this section are dynamically pulled from your Salesforce instance and include custom Lead Statuses. Additionally, you can display and include Inactive Lead Statuses.

Keep in mind that selecting Lead Statuses **includes** them in the Engagement run. If values are not selected, they will not be considered in the calculations. New Lead Statuses will not be automatically included in Engagement. You will have to manually select those Statuses in the LeanData app.

Custom Filters

Within the **Custom Filters tab**, custom filters can be added to Engagement runs. These will allow you to be more precise with which records you would like to include or exclude from your Engagement dataset. These filters can be placed on the following objects: Lead, Contact, Account, Campaign, Campaign Member, Task, Event.

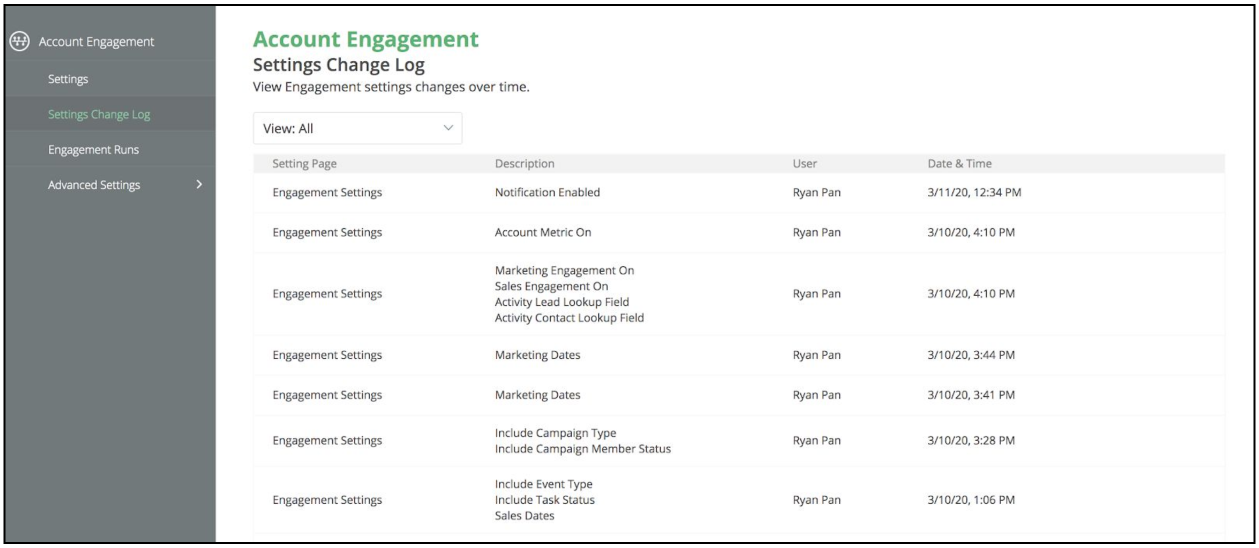
Field-to-value filters can be added across multiple objects. Additionally, multiple Field-to-value filters can be added within the same object. Within the **Rule Logic** box**,** you can combine multiple filter conditions using AND and OR statements to form more complex filter requirements.

Please Note: LeanData will include records that meet these filter conditions and exclude records that don't meet these filter conditions. These filter conditions will only be applied to records that have been included on the main LeanData Engagement **Settings** page.

Remember to click **Save** in the top right hand corner!

Settings Change Log Page

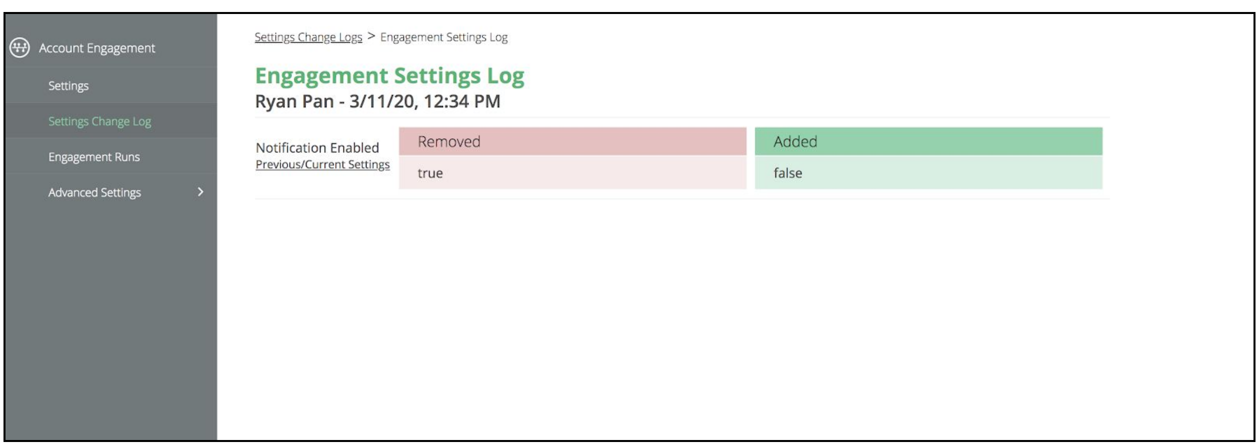
Log Page



The **Settings Change Log** is an Audit Trail of all changes to your LeanData Engagement Settings. In this log, the location of a settings change, the settings change, which user made the change, and the date & time of change will be captured.

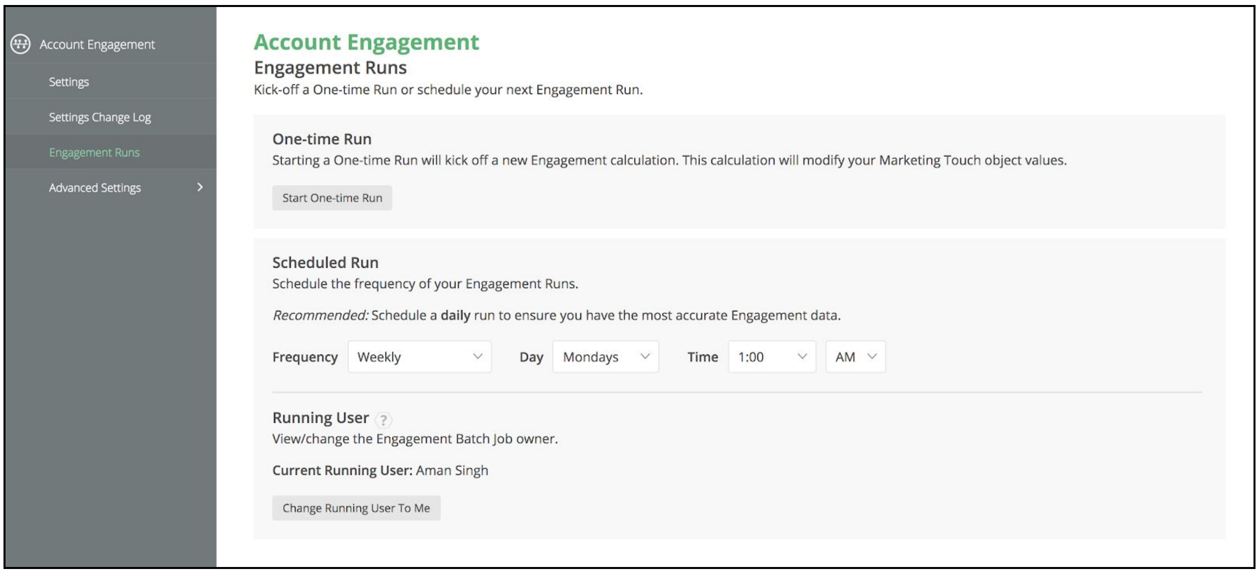
You can explore the changes in more detail by mousing over a row and selecting the **View Log** button.

Log Details Page



After selecting the **View Log** button, you will be able to view the exact setting change that occured. In the above screenshot, the toggle on the Notifications page was deactivated.

Engagement Runs Page



Use this page to kick off One-Time Run and schedule Engagement Runs.

One-Time Run: Clicking on the Run button will bring up another dialog box to confirm the run.

When a one-time run is kicked off, new qualified Engagement data will be created and existing unqualified Engagement data will be deleted.

Scheduled Run: Runs can be scheduled at a particular time and date at the following frequencies: Hourly, Daily, Weekly, and Monthly.

Recommended run frequency is daily in the late evening / early morning to allow for quick access to updated Engagement data without interfering with business logic. Engagement data will only be re-calculated in cases where there is a change in the underlying dataset.

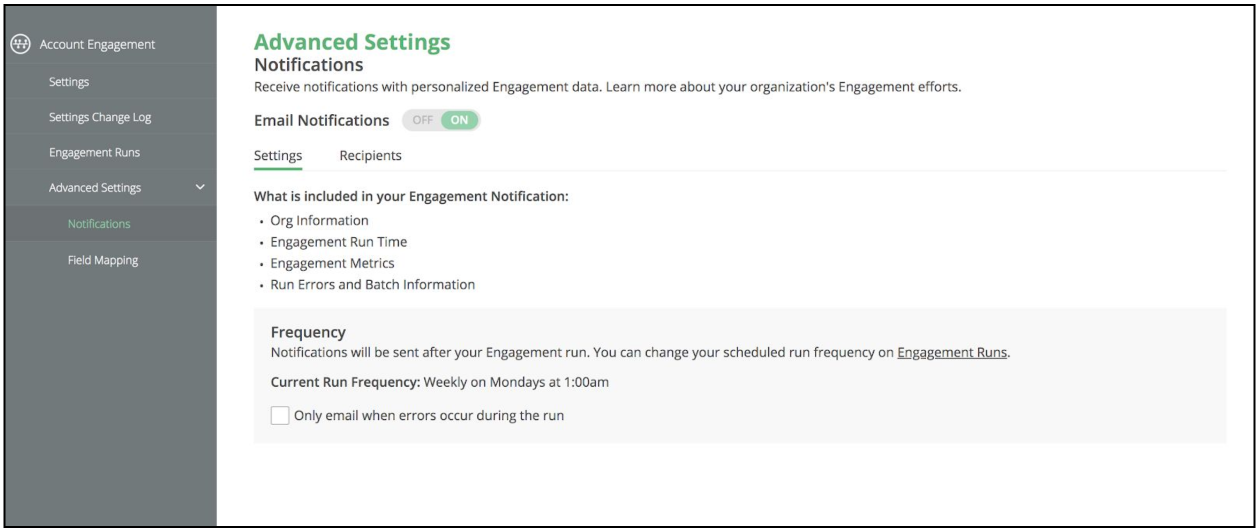
On this page, you can change the **Running User** to yourself. Whomever is designated as the Running User will be attributed to LeanData Engagement Runs in your Salesforce instance

If a run is scheduled without designating the running user, then the user who scheduled the run will automatically be designated as the running user.

If you would like to switch the Running User to someone else, that user will have to log in and change the Running User to themselves.

Notifications Page

Setting Tab



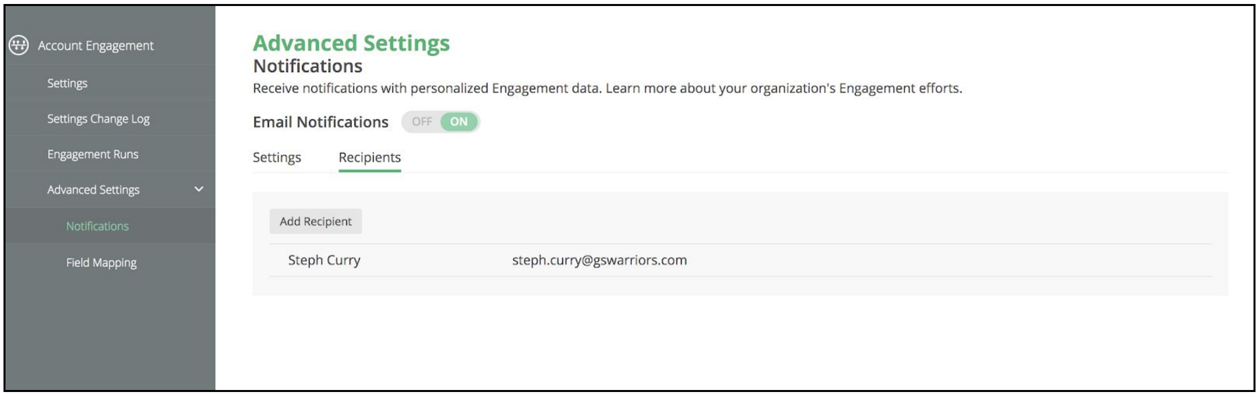
Use this page to set up LeanData Engagement operational notifications. Once you have turned on your Engagement notifications and added recipients, the recipients will receive a LeanData Engagement report after your Engagement run completes.

The metrics included in the Engagement notification are as follows:

- Org Information
- Engagement Run Time
- Engagement Metrics
- Run Errors & Batch Information

There is also an option to only receive a notification when errors occur during the run.

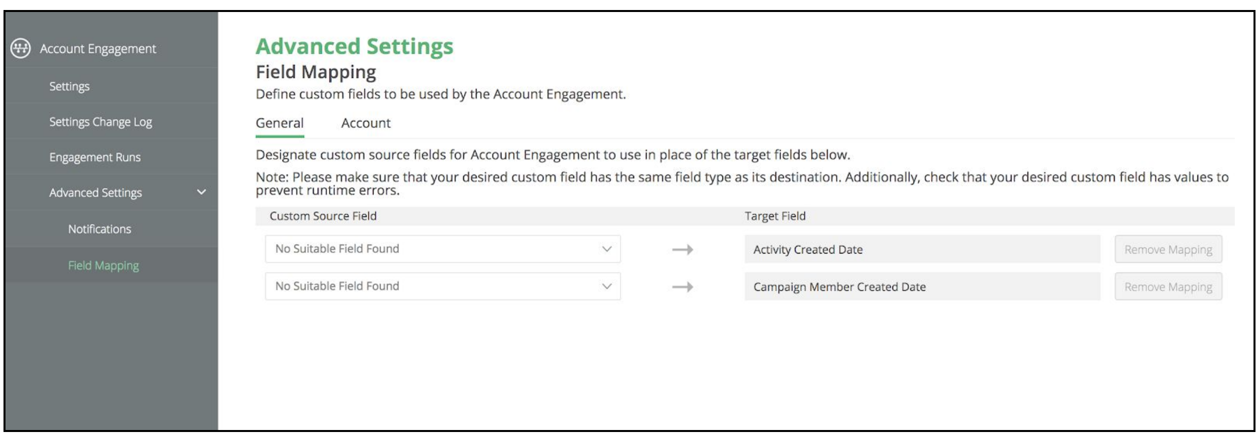
Recipients Tab



On the **Recipients Tab**, you can designate recipients to receive the Engagement Notification.

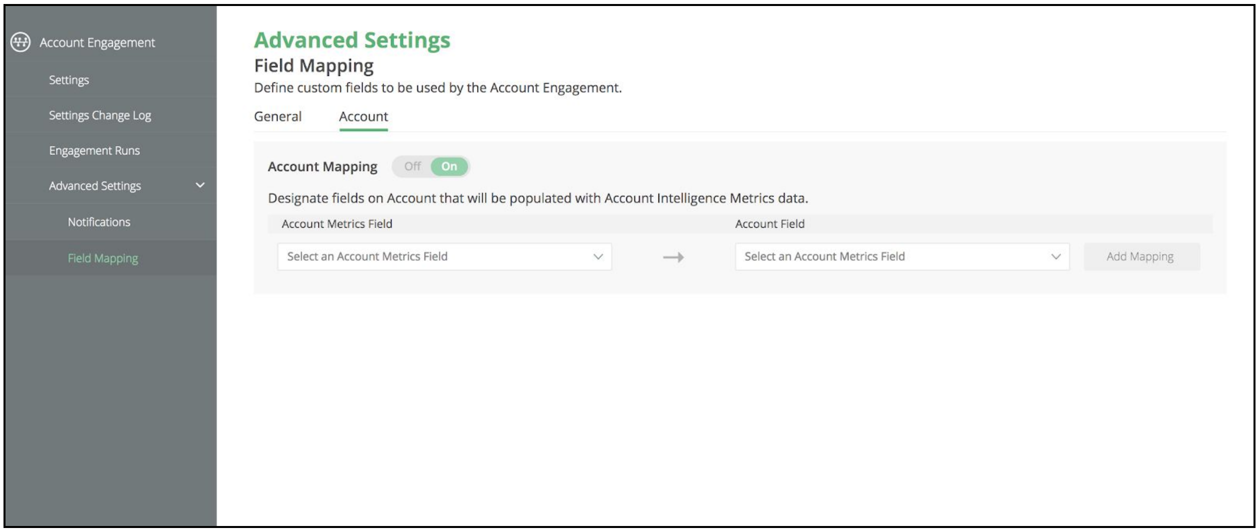
Field Mapping Page

General Tab



On this page, you can map over your own custom fields to the Activity Created Date and Campaign Member Created Date for inclusion in their Engagement Run. This feature is useful when the standard Created Date fields on Activities and Campaign Members do not accurately indicate when that particular engagement occurred.

Account Tab



On this page, you can map over fields from the Account Metrics object to the standard Salesforce Account object. This allows for other business processes to consume LeanData Engagement data from the standard Salesforce Account object. Another possible use case is to reference LeanData Engagement fields on Account within a Lead Routing, Contact Routing, or Account Routing flow.

Please note: To designate a destination for an Account Metrics field, the desired field on Account needs to be the same field type as the Account Metric field.

To view a list of Account Metrics fields, please view the LeanData Engagement Overview guide.

More Questions?

Reach out to your LeanData CSM with any further questions.