LeanData Engagement Settings Walkthrough





Overview	3
LeanData Engagement Settings Page General Tab Marketing Engagements Tab	3 3
Sales Engagements Tab Lead Statuses Custom Filters	4 5 6 7
Settings Change Log Page Log Page Log Details Page	8 8 8
Engagement Runs Page	9
Notifications Page Setting Tab Recipients Tab	10 10 11
Field Mapping Page General Tab Account Tab	11 11 12
More Questions?	12

 $\ensuremath{\mathbb{C}}$ 2020 LeanData Inc. All rights reserved. LeanData is a registered trademark



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

Account Engagement A Settings D	Account Engagement Settings Jefine your Account Engagement Settings. These settings are the guidelines for your Engagement Run.
Settings Change Log	Seneral Marketing Engagements Sales Engagements Lead Statuses Custom Filters
Engagement Runs	Engagement Departing
Advanced Settings >	Select which metrics you would like to include in your Engagement report. Recommended: To run effectively, make sure that Marketing Engagements, Sales Engagements, and Account Intelligence Metrics are enabled. Marketing Engagements off on Sales Engagements off on Lookup Fields ? Designate the lookup field on the Activity object that you would like LeanData to reference when making Engagements. Lead Lookup Field id_lead_c Contact Lookup Field id_contact_c Event and Task Lookup Auto-population Enable the LeanData Event and Task Lookup Auto-population to populate the above fields on Activity with Leads or Contacts. Note: Do not enable if you already have Lead and Contact Lookup Fields and would not like LeanData to populate these fields. Enable Auto-population off on Account Metrics off on

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

Account Engagement Settings Settings Change Log	Account Engagement Settings Define your Account Engagement Settings. These settings are the guidelines for your Engagement Run. General Marketing Engagements Sales Engagements Lead Statuses Custom Filters
Engagement Runs	
Advanced Settings >	Relevant Marketing Engagement Timeframe Choose a date for Engagement calculations. The calculation looks forward from the selected date. Absolute Date 04/03/2020 Relative Timeframe Campaign Types and Campaign Member Status Select relevant campaign types and campaign member statuses to include in your engagement reports. Campaign Types (12) Select 'Has Responded' Statuses Select 'Has Responded' Statuses Display Inactive Campaign Types (*
	Advertisement
	Banner Ads Responded Sent

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

# A	ccount Engagement Settings	Accour Settings Define your	nt Engagement	gs. These settings are the ;	guidelines for your Enga	agement Run.	
	Settings Change Log	General	Marketing Engagements	Sales Engagements	Lead Statuses	Custom Filters	
	Engagement Runs						
	Advanced Settings	Choose At	nt Sales Engagement Tin a date for Engagement calcu osolute Date 01/12/2018	he Frame lations. The calculation loo	ks forward from the sel	lected date.	
		Task Ty Select re	/pe elevant Sales Tasks to include	in your engagement repo	rts.		Cales Tasks
		C	all 🗸	Email	Meeting	Other	
		Task St Select re	a tus elevant Task Statuses to inclu	de in your engagement re	ports.		
		C V S	ompleted valing on omeone else	Deferred	✓ In Progress	Vot Started	
		Event T Select re	ype Nevant Sales Events to includ	e in your engagement rep	orts.		Manager Enable Sales Events

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

H Account Engagem	ent	Accour Settings Define your	nt Engagement	s. These settings are the g	uidelines for your En	ngagement Run.		
Settings Change L	.og	General	Marketing Engagements	Sales Engagements	Lead Statuses	Custom Filters		
Engagement Runs	5	Select le	ad statuses to include in your	engagement reports.			Display Inactive Lead Statuses	
Advanced Setting	s >		losed - Converted losed - Not Converted Jopen - Not Contacted Vorking - Contacted				Display inactive 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!

DLean**Data**[•]

Settings Change Log Page

Log Page

Account Engagement Settings Settings Change Log	Account Engagement Settings Change Log View Engagement settings changes of View: All	ver time.		
Engagement Runs	Setting Page	Description	User	Date & Time
Advanced Settings >	Engagement Settings	Notification Enabled	Ryan Pan	3/11/20, 12:34 PM
	Engagement Settings	Account Metric On	Ryan Pan	3/10/20, 4:10 PM
	Engagement Settings	Marketing Engagement On Sales Engagement On Activity Lead Lookup Field Activity Contact Lookup Field	Ryan Pan	3/10/20, 4:10 PM
	Engagement Settings	Marketing Dates	Ryan Pan	3/10/20, 3:44 PM
	Engagement Settings	Marketing Dates	Ryan Pan	3/10/20, 3:41 PM
	Engagement Settings	Include Campaign Type Include Campaign Member Status	Ryan Pan	3/10/20, 3:28 PM
	Engagement Settings	Include Event Type Include Task Status Sales Dates	Ryan Pan	3/10/20, 1:06 PM

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

🕀 Account Engagement	Settings Change Logs > Eng	agement Settings Log					
Settings	Engagement S Rvan Pan - 3/11/2	Engagement Settings Log Byan Pan - 3/11/20, 12:34 PM					
Settings Change Log		Demoved	Added				
Engagement Runs	Notification Enabled Previous/Current Settings	true	false				
Advanced Settings >			Tuise.				



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

(††	Account Engagement Settings	Account Engagement Engagement Runs Kick-off a One-time Run or schedule your next Engagement Run.
	Settings Change Log Engagement Runs Advanced Settings	One-time Run Starting a One-time Run will kick off a new Engagement calculation. This calculation will modify your Marketing Touch object values. Start One-time Run
		Scheduled Run Schedule the frequency of your Engagement Runs. Recommended: Schedule a daily run to ensure you have the most accurate Engagement data. Frequency Weekly Day Mondays Time 1:00 AM Running User ?? View/change the Engagement Batch Job owner. Current Running User: Arman Singh Change Running User To Me

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

 Account Engagement Settings 	Advanced Settings Notifications Receive notifications with personalized Engagement data. Learn more about your organization's Engagement efforts.
Settings Change Log	Email Notifications OFF ON
Engagement Runs	Settings Recipients
Advanced Settings 🔷 🗸	What is included in your Engagement Notification:
Notifications	Org Information Engagement Pun Time
Field Mapping	Engagement Metrics Run Errors and Batch Information
	Frequency Notifications will be sent after your Engagement run. You can change your scheduled run frequency on <u>Engagement Runs</u> . Current Run Frequency: Weekly on Mondays at 1:00am Only email when errors occur during the run

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

Account Engagement Settings Settings Log	Advanced Settings Notifications Receive notifications with personalized Engagement data. Learn more about your organization's Engagement efforts.
Engagement Runs	Settings Recipients
Advanced Settings 🛛 🗸	
Notifications	Add Recipient
Field Mapping	Steph Curry steph.curry@gswarriors.com

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

Field Mapping Page

General Tab

 Account Engagement Settings 	Advanced Settings Field Mapping Define custom fields to be used by the Account Engagemen	t.		
Settings Change Log	General Account			
Engagement Runs	Designate custom source fields for Account Engagement to	use in place of th	e target fields below.	
Advanced Settings 🔷	Note: Please make sure that your desired custom field has to prevent runtime errors.	he same field typ	e as its destination. Additionally, check that your des	ired custom field has values to
Notifications	Custom Source Field		Target Field	
Field Mapping	No Suitable Field Found	\rightarrow	Activity Created Date	Remove Mapping
	No Suitable Field Found \sim	\rightarrow	Campaign Member Created Date	Remove Mapping
		2		

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

Ş
ng

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 <u>LeanData Engagement Overview</u> guide.

More Questions?

Reach out to your LeanData CSM with any further questions.