

# LeanData Engagement

## Install Guide



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## Overview

The following guide provides instructions for setting up LeanData Engagement. This product has 5 main components: **Engagement Settings, Account View visualization, Campaign View visualization, Engagement Reports & Dashboard, and Permissions**. Each section of the install guide will address a specific component. All components must be installed for LeanData Engagement to run effectively.

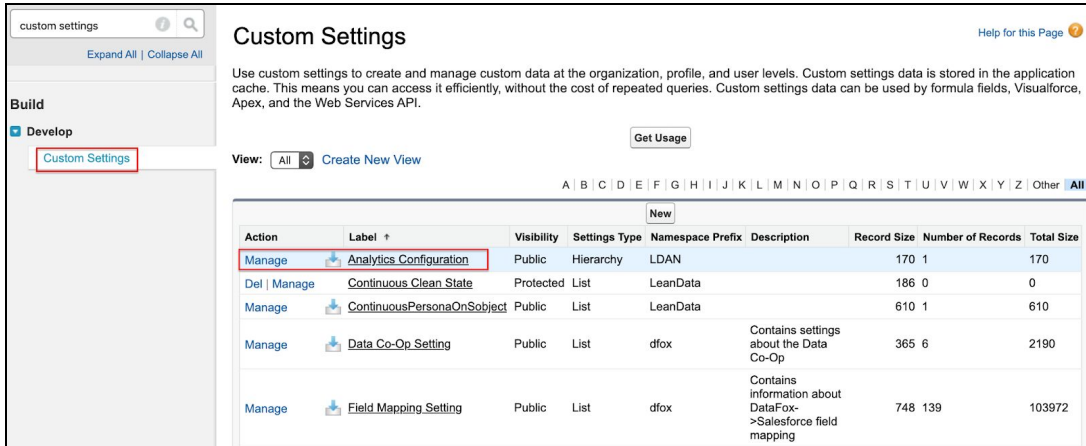
## Installation and General Engagement Settings

Before setting up your Engagement Settings, please read the below guidelines:

- On Installation, make sure to complete steps 1-3. Once those steps have been completed, you will not need to do them again.
- During and after Installation, complete steps 4-8 to use LeanData Engagement.
  - Step 5 is required for Engagements to be calculated.
  - Step 8 is required for installation to capture previous Sales Engagements.

**Please Note:** The LeanData Go-To-Market Operations Solutions: Analytics is a new and separate package from the LeanData App package in the AppExchange. To access Engagement you will need to install the LeanData Engagement Package.

1. Install the LeanData Engagement Package via the Salesforce AppExchange.
2. After installation has completed, reach out to your LeanData representative to enable LeanData Engagement in your Salesforce instance.
3. Enable LeanData Engagement Task and Event Triggers, allowing Engagement to capture Sales Engagements.
  - a. Visit Custom Settings via the following Quick Find path.
    - i. **Setup -> Develop (or Custom Code) -> Custom Settings.**
  - b. Select **Analytics Configuration** Setting.
  - c. Select **Manage**.



The screenshot shows the Salesforce Custom Settings interface. On the left, there is a navigation menu with 'Build' and 'Develop' sections. Under 'Develop', 'Custom Settings' is highlighted. The main content area is titled 'Custom Settings' and includes a 'Get Usage' button. Below this, there is a 'View:' dropdown set to 'All' and a 'Create New View' link. A table lists various custom settings with columns for Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size. The 'Analytics Configuration' setting is highlighted with a red box.

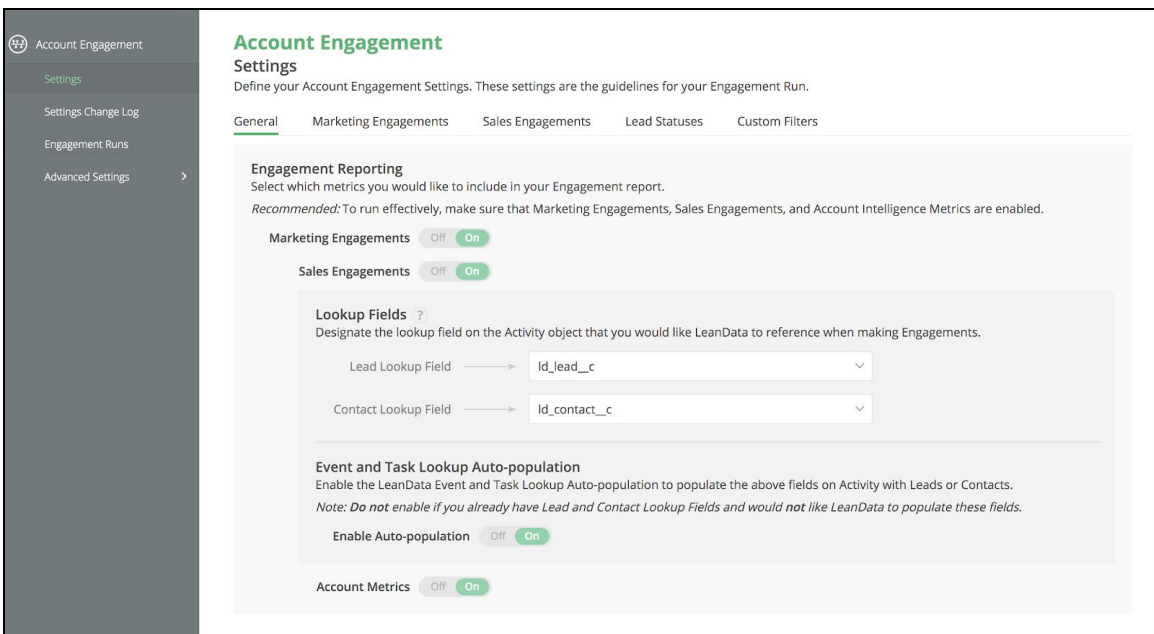
Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	Analytics Configuration	Public	Hierarchy	LDAN		170	1	170
Del   Manage	Continuous Clean State	Protected	List	LeanData		186	0	0
Manage	ContinuousPersonaOnSubject	Public	List	LeanData		610	1	610
Manage	Data Co-Op Setting	Public	List	dfox	Contains settings about the Data Co-Op	365	6	2190
Manage	Field Mapping Setting	Public	List	dfox	Contains information about DataFox->Salesforce field mapping	748	139	103972

d. Select New and Enable all of the following checkboxes:

- i. **EventTrigger**
- ii. **TaskTrigger**
- iii. **AccountTrigger**
- iv. **CampaignTrigger**
- v. **CampaignMemberTrigger**
- vi. **ContactTrigger**
- vii. **LeadTrigger**

4. Open LeanData Engagement managed app in Salesforce.

5. Open Settings via the Settings Page.



The screenshot shows the 'Account Engagement Settings' page in Salesforce. The left sidebar contains navigation options: 'Settings', 'Settings Change Log', 'Engagement Runs', and 'Advanced Settings'. The main content area is titled 'Account Engagement Settings' and includes a description: 'Define your Account Engagement Settings. These settings are the guidelines for your Engagement Run.' Below this, there are tabs for 'General', 'Marketing Engagements', 'Sales Engagements', 'Lead Statuses', and 'Custom Filters'. The 'Engagement Reporting' section is expanded, showing options to select metrics for the report. A recommendation states: 'Recommended: To run effectively, make sure that Marketing Engagements, Sales Engagements, and Account Intelligence Metrics are enabled.' There are toggle switches for 'Marketing Engagements' and 'Sales Engagements', both set to 'On'. The 'Lookup Fields' section allows designating lookup fields on the Activity object. The 'Lead Lookup Field' is set to 'Id\_lead\_\_c' and the 'Contact Lookup Field' is set to 'Id\_contact\_\_c'. Below this, there is an 'Event and Task Lookup Auto-population' section with a note: '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.' The 'Enable Auto-population' toggle is set to 'On'. At the bottom, the 'Account Metrics' toggle is also set to 'On'.

**Note:** For more detailed information on LeanData Engagement Settings, please refer to our [LeanData Engagement Settings Walkthrough](#) guide.

- a. Within the **General** tab, enable the **Marketing Engagements, Sales Engagements, and Account Metrics**.
  - b. When **Sales Engagements** has been enabled, designate the **Lead Lookup Field** and **Contact Lookup Field** on Activity where you would like LeanData to populate the Lead and/or Contact names for Activities.
    - i. If you do not have these fields, please create Lookup fields between Lead and Activity and Contact and Activity. Once those fields have been created, select them in the dropdown in the **Sales Engagement** tab.
    - ii. Refer to our [LeanData Engagement Activity Lookup Fields Install Guide](#) for instructions.
  - c. Decide whether you would like LeanData to populate your Lead and Contact Lookup Fields.
    - i. If you already had existing Lead and Contact Lookup Fields and would like LeanData to populate your lookup, turn on the **Enable Auto-Population** toggle.
    - ii. If you already had existing Lead and Contact Lookup Fields and would not like LeanData to populate your lookup, turn off the **Enable Auto-Population** toggle.
    - iii. If you had to create Lookups Fields for LeanData Engagement, allow LeanData to populate your lookup, by turning on the **Enable Auto-Population** toggle.
6. Set Engagement Settings on the **Marketing Engagements, Sales Engagements, and Lead Statuses** Tabs.
  7. Designate time for Engagement Runs via the **Engagement Runs** page.
  8. Kick-off a One Time Run on the **Engagement Runs** page.
    - a. This calculation will backfill lead and contacts on the Activity Object to capture previous Sales Engagements and create an Account Metric (AM) object for each account in your Salesforce over the selected time frame.
  9. Engagement will run and update Engagement data based on scheduler settings on the Engagement Runs page.
    - a. This calculation will include qualified Engagement data via Triggers (for **Sales Engagements**), Campaign object (for **Marketing Engagements**), and Accounts (for **Account Metrics**).

## Setting Up the Engagement Account View

Adding the Engagement Account View onto your Account layouts will allow you to visualize Engagements on your Account pages. Once this view has been set up, you will not need to make any further changes.

1. After installing the LeanData managed app, navigate to an Account page and select **Edit Layout**. Alternatively, you can access your Account layouts in Salesforce Setup.
2. Create a new Section by clicking and dragging down a Section from the top into the layout to an appropriate location on the Account page.
3. Name this section **LeanData Engagement**.
4. Within the **Visualforce Pages** section of the Page Layout palette at the top, click and drag **EngagementAccountView** into the **LeanData Engagement** section you just created.
5. Click Properties (wrench icon) within the Visualforce page area (colored section) and adjust the height of the Visualforce element to **420 pixels**.
6. Click OK and Save your Account layout changes.

## Setting Up the Engagement Campaign View

Adding the Engagement Campaign View onto your Campaign layouts will allow you to visualize Engagements from your Campaign pages. Once this view has been set up, you will not need to make any further changes.

1. After installing the LeanData managed app, navigate to a Campaign page and select **Edit Layout**. Alternatively, you can access your Campaign layouts in Salesforce Setup.
2. Create a new Section by clicking and dragging down a Section from the top into the layout to an appropriate location on the Campaign page.
3. Name this section **LeanData Engagement**.
4. Within the **Visualforce Pages** section of the Page Layout palette at the top, click and drag **EngagementCampaignView** into the **LeanData Engagement** section you just created.
5. Click Properties (wrench icon) within the Visualforce page area (colored section) and adjust the height of the Visualforce element to **230 pixels**.
6. Click OK and Save your Campaign layout changes.

## Installing & Sharing Engagement Reports & Dashboards

Please follow the steps below to install and share LeanData Engagement Reports & Dashboards. Once you have completed these steps, you will not need to make any further changes.

### To Install:

1. Install the **LeanData Analytics Report** package.
  - a. Your LeanData representative will send this over in advance.
2. Your Engagement Reports will appear in the **LeanData Engagement Reports** folder.
3. Your Engagement Dashboards will appear in the **LeanData Engagement Dashboards** folder.

### To Share Reports (if Reports package has not been installed for all users):

1. Navigate to the **Reports** tab within Salesforce.
2. In the Folders search bar, search for **LeanData Engagements Reports**.
3. Hover over the folder and select the blue pin icon.
4. Select **Share**.
5. Choose which Users and Roles to share the folder with.
6. (Optional) - Determine report permissions.

### To Share Dashboards (if Reports package has not been installed for all users):

1. Navigate to the **Dashboards** tab within Salesforce.
2. In the Folders search bar, search for **LeanData Engagements Dashboards**.
3. Hover over the folder and select the blue pin icon.
4. Select **Share**.
5. Choose which Users and Roles to share the folder with.
6. (Optional) - Determine dashboard permissions.

## Managing Engagement Permissions

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

- **LeanData Analytics Read-Only**
- **LeanData Analytics 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.