LeanData Engagement

Install Guide

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.

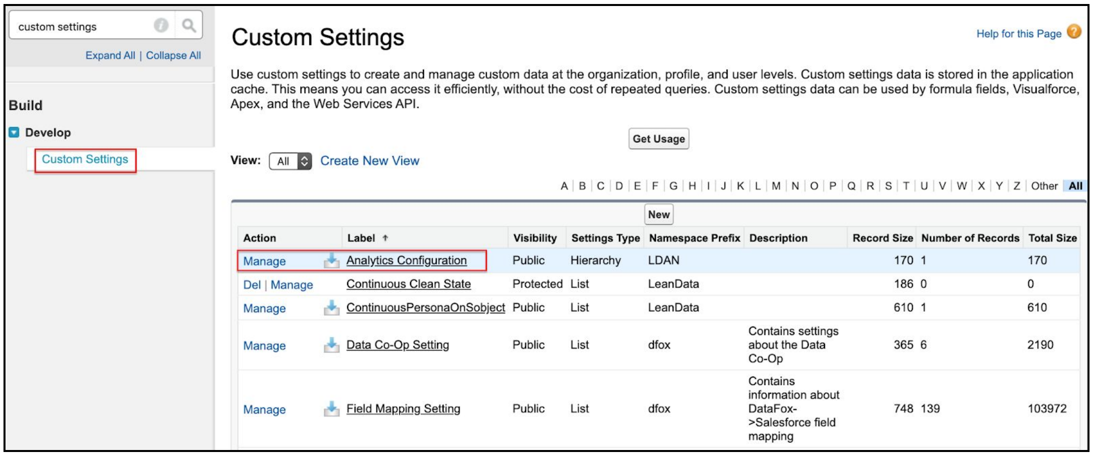
Installation and General Engagement Settings

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.

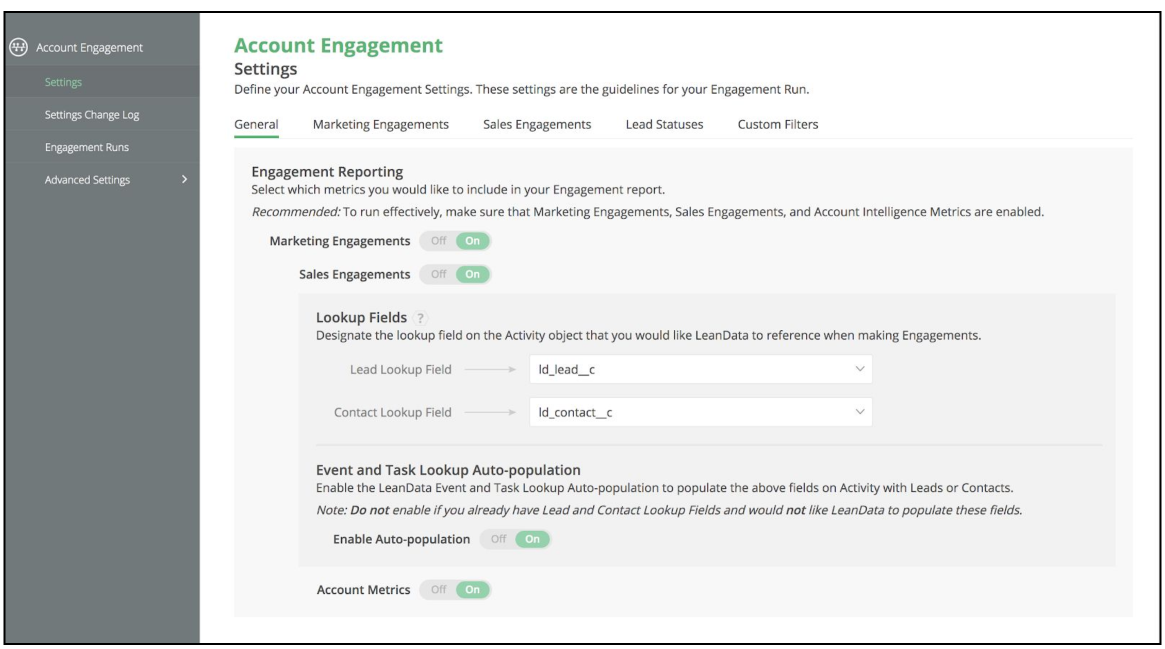
Please Note: The LeanData Go-To-Market Operations Solutions: Analytics is a new and separate package from the LeanData App package in the AppExchange. To access Engagement you will need to install the LeanData Engagement Package.

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.**



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.



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.