

LeanData Admin

Managed App Install Guide





Overview

The following will talk you through installation of the LeanData managed package.

The LeanData managed app allows you to:

- Get more context into Accounts via matched leads
- Assign Leads, Contacts, Accounts, Ops to the right owner in real time
- Analyze impact of sales & marketing campaigns on pipeline & revenue
- Optimize sales and marketing funnel based on routing, attribution & funnel analytics

Functionality includes:

- Routing for leads, contacts, accounts, and opportunities
- Auto-conversion and de-duplication for leads
- Lead to Account Matching with customized rules and filters
- Multi-touch Attribution modeling
- Advanced insights & audit logging

Overall installation process includes:

1. Install LeanData managed app from AppExchange
2. Grant permissions to LeanData managed application

LeanData Search Indexing Jobs

In order to efficiently perform matching in your Salesforce instance, LeanData runs a search indexing job on your Lead and Account records upon installation. LeanData will also automatically index Leads and Accounts as they are created, or if there are updates made to them that would require re-indexing.

Upon installation, LeanData will run 2 indexing jobs to prepare Lead and Account records for matching:

- PopulateAccountEmailDomainBatch
- PopulateLeadSearchFieldBatch

During these jobs, LeanData will be generating normalized versions of our fuzzy matching fields, such as Company Name, Zip Code, Website, and Email Domain. During these jobs, LeanData will also associate email domains from Contacts with their respective Accounts.

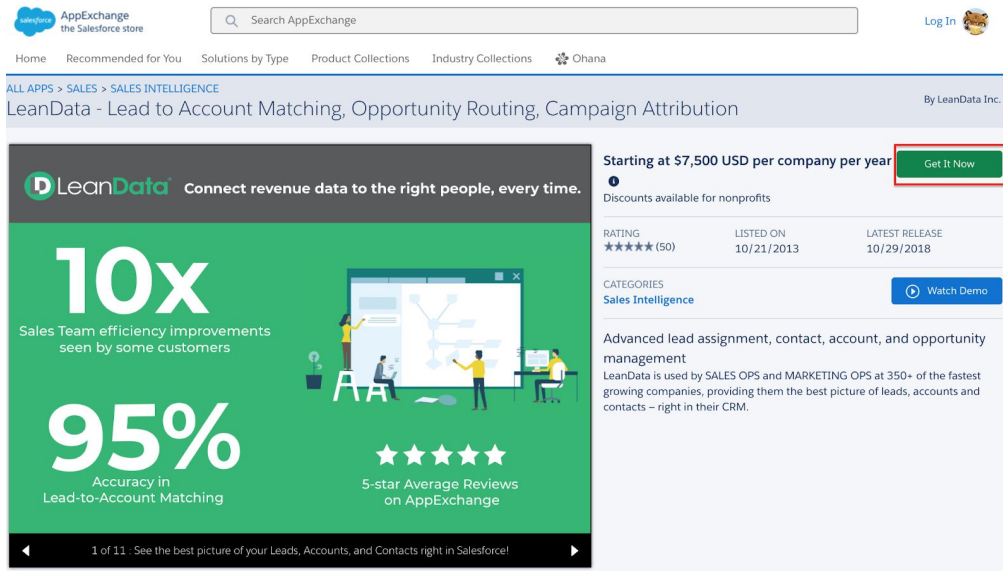
These initial indexing jobs will run under the LeanData Managed Package User. They will also automatically abort after 1 week.

Note: These jobs will be modifying LeanData indexing fields on your Lead and Account records. On Leads, this field is LeanData__Search_Index__c. On Accounts, the LeanData__LD_EmailDomains__c, and LeanData__Search__c fields will be populated. If you have any processes running that could be impacted by updating these records, please contact your LeanData representative.

For more information on LeanData Search indexing please see our Indexing Guide at <https://leandatahelp.zendesk.com/hc/en-us/articles/360041402233>

Installation Process

1. [Go to the LeanData managed app](#) in the AppExchange
2. Click **Get It Now**



AppExchange the Salesforce store

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ALL APPS > SALES > SALES INTELLIGENCE

LeanData - Lead to Account Matching, Opportunity Routing, Campaign Attribution By LeanData Inc.

LeanData Connect revenue data to the right people, every time.

10x Sales Team efficiency improvements seen by some customers

95% Accuracy in Lead-to-Account Matching

5-star Average Reviews on AppExchange

Starting at \$7,500 USD per company per year

Discounts available for nonprofits

RATING: ★★★★★ (50)

LISTED ON: 10/21/2013

LATEST RELEASE: 10/29/2018

CATEGORIES: Sales Intelligence

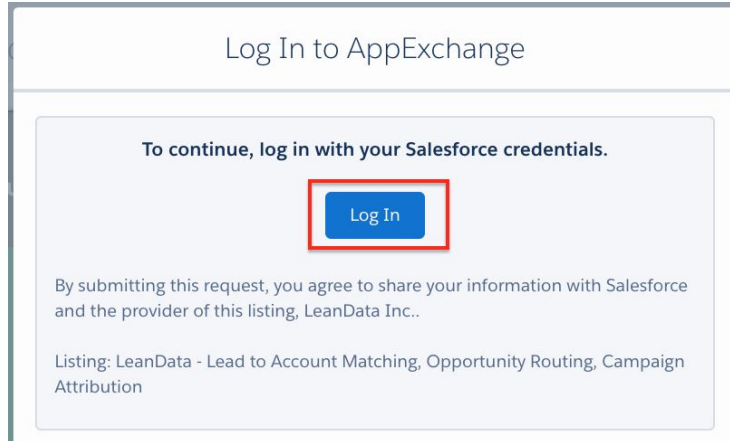
Watch Demo

Advanced lead assignment, contact, account, and opportunity management

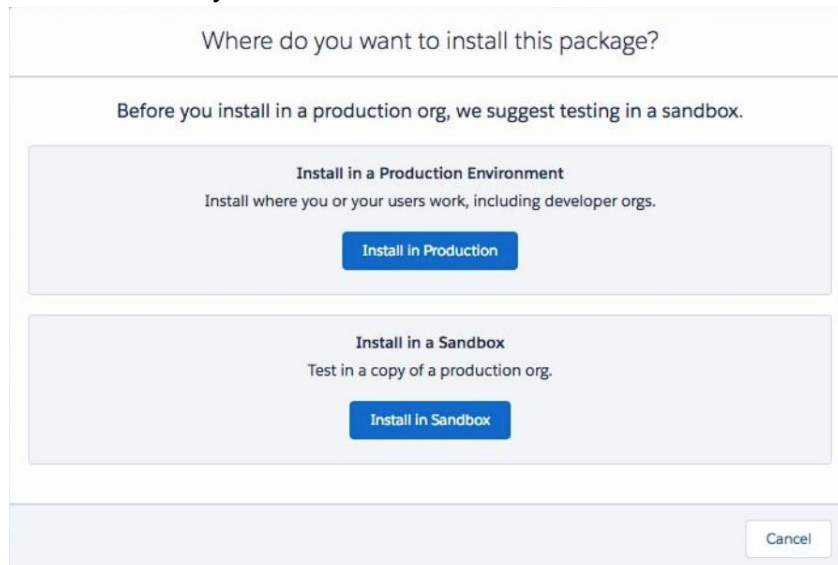
LeanData is used by SALES OPS and MARKETING OPS at 350+ of the fastest growing companies, providing them the best picture of leads, accounts and contacts – right in their CRM.

1 of 11 - See the best picture of your Leads, Accounts, and Contacts right in Salesforce!

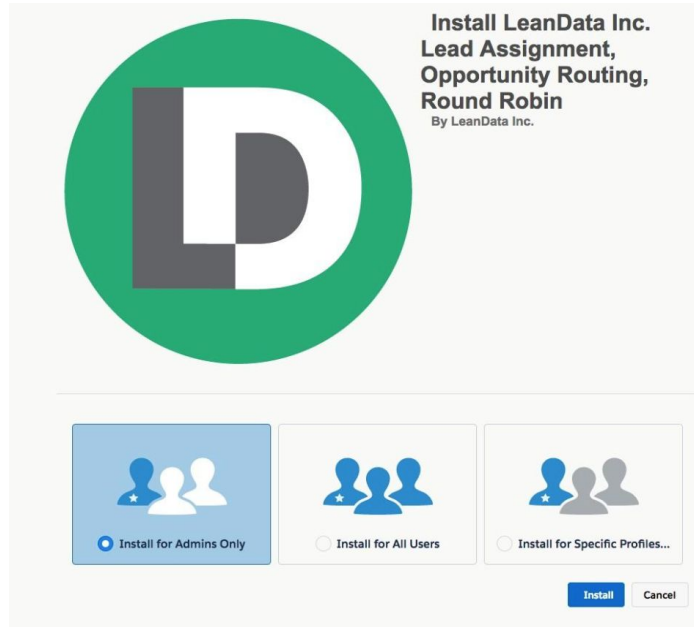
3. Login as a Salesforce administrator



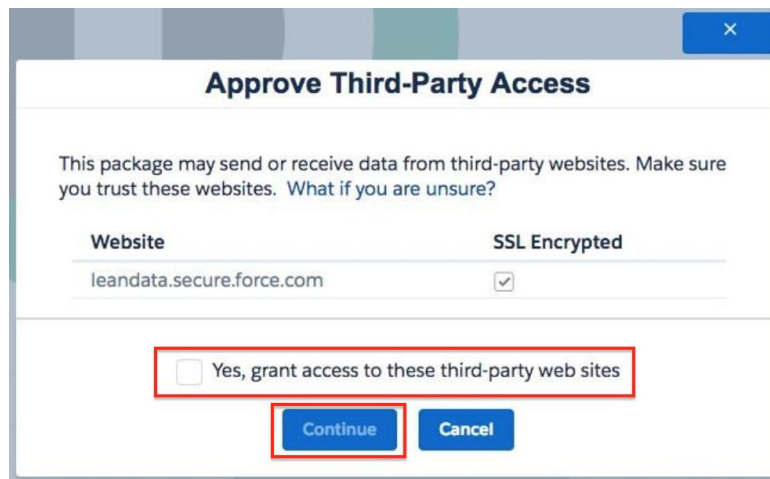
4. Select the Environment you would like to Install into



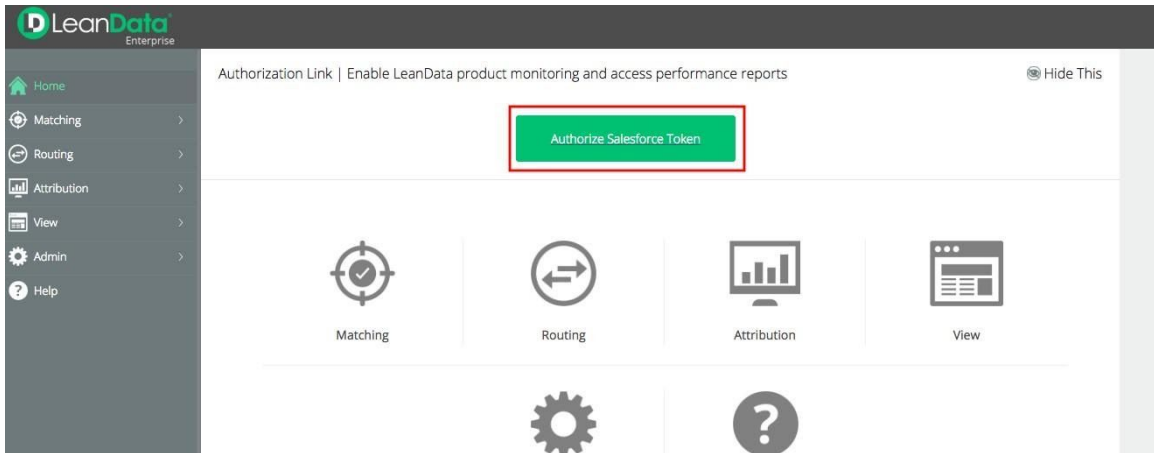
5. Review package installation details (including terms and conditions) and click [Confirm and Install](#)
6. Select [Install for Admins Only](#) (okay to [Install for All Users](#) if needed) and click [Install](#).



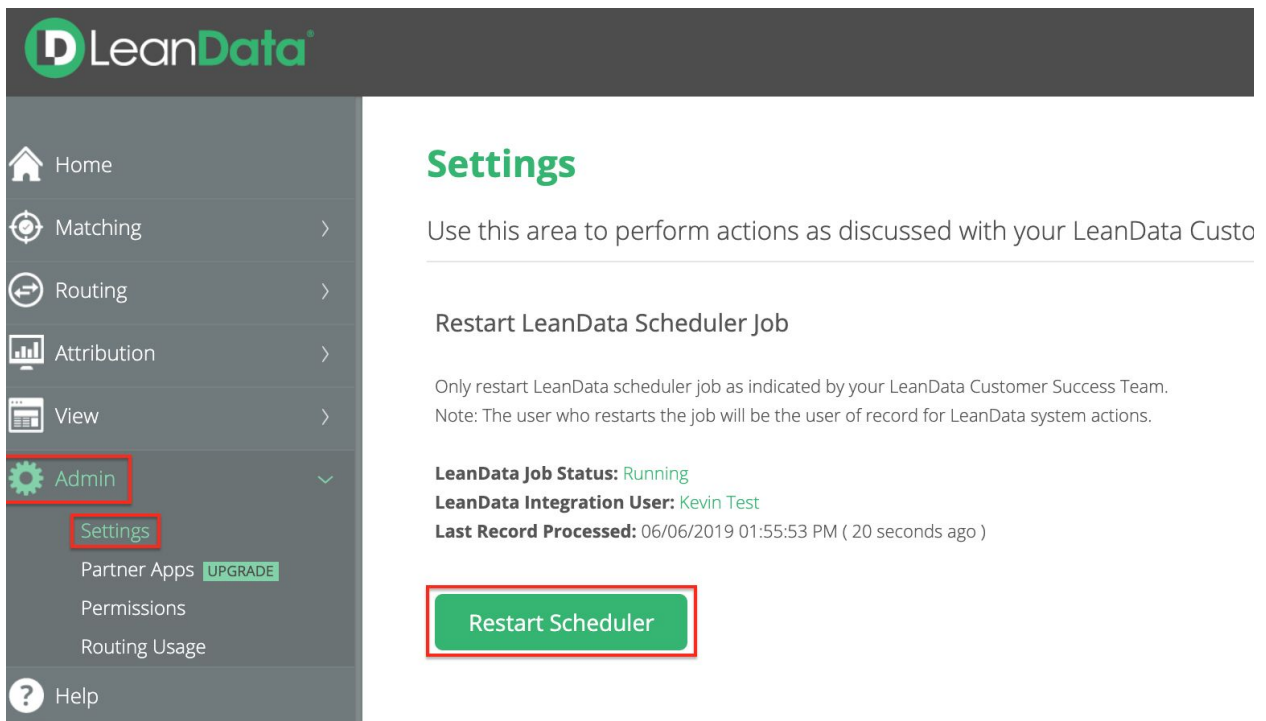
7. Select **Yes**, grant access to these third-party web sites and click **Continue**



8. Wait for install confirmation email if install time is running long
9. Once you receive the email confirmation, go to into your Salesforce instance and find the LeanData Dashboard from your App Launcher
 - a. If you are Using Salesforce Classic, you can find LeanData in your Salesforce Tabs
10. In the LeanData Home page, click the **Authorize Salesforce Token** button
 - a. If the **Authorize Salesforce Token** button is not visible, click the **Show Authorization** link in the top right corner



11. Navigate to the **Admin** → **Settings** section of the LeanData Dashboard



12. After your configuration has been completed, click on the **Restart Scheduler** Button in the **Restart LeanData Scheduler Job** section on the upper left section of the page.
Note: This will initiate LeanData processing in your Salesforce instance. Only restart the scheduler when you are ready for LeanData to begin processing your records continuously.

13. Notify your LeanData contact that Installation has completed