

LeanData Attribution

How to Create a Custom Report Type



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Overview

Thanks for using LeanData's Attribution product. Out of the box, LeanData Attribution comes with standard reports to help you get started understanding your Attribution data. In order to take full advantage of the data and insights unlocked by our Attribution product, featuring best in class Lead to Account Matching, you may also need to create a custom report type to include custom fields that are relevant to your business.

Why do I need to create a Custom Report Type on the Marketing Touch Object?

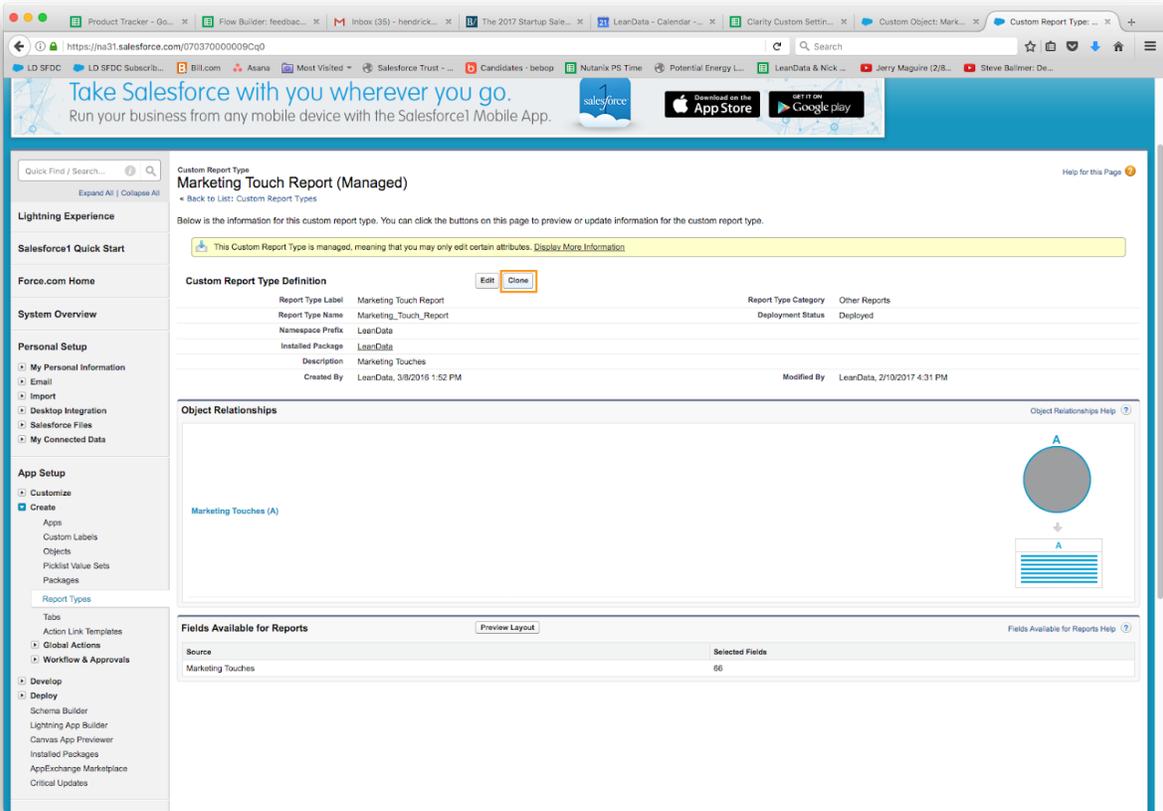
LeanData's standard report type does not include any of your custom fields. If you want to pull in more fields into your Marketing Touch reports such as "Target Account" or other custom fields, you will have to create a custom report type.

The Marketing Touch Object interacts with many of the standard objects in your SFDC environment, so you can pull in fields via lookup relationships from the following objects: Account, Lead, Contact, Campaign, Opportunity.

Once you have created your custom report type, you can create any number of reports and dashboards off this custom report type.

Creating a Custom Report Type from the Default Marketing Touch Report Type

1. To create a custom report, clone the *LeanData Marketing Touch Report (Managed)* Report Type
 - Navigate to Setup → App Setup → Create → Report Types
 - Click [Clone] button to create a new version of the *Marketing Touch Report* that can include your custom fields



The screenshot shows the Salesforce interface for configuring a Custom Report Type. The main heading is "Marketing Touch Report (Managed)". Below this, there is a yellow banner stating: "This Custom Report Type is managed, meaning that you may only edit certain attributes. [Display More Information](#)".

The "Custom Report Type Definition" section contains the following details:

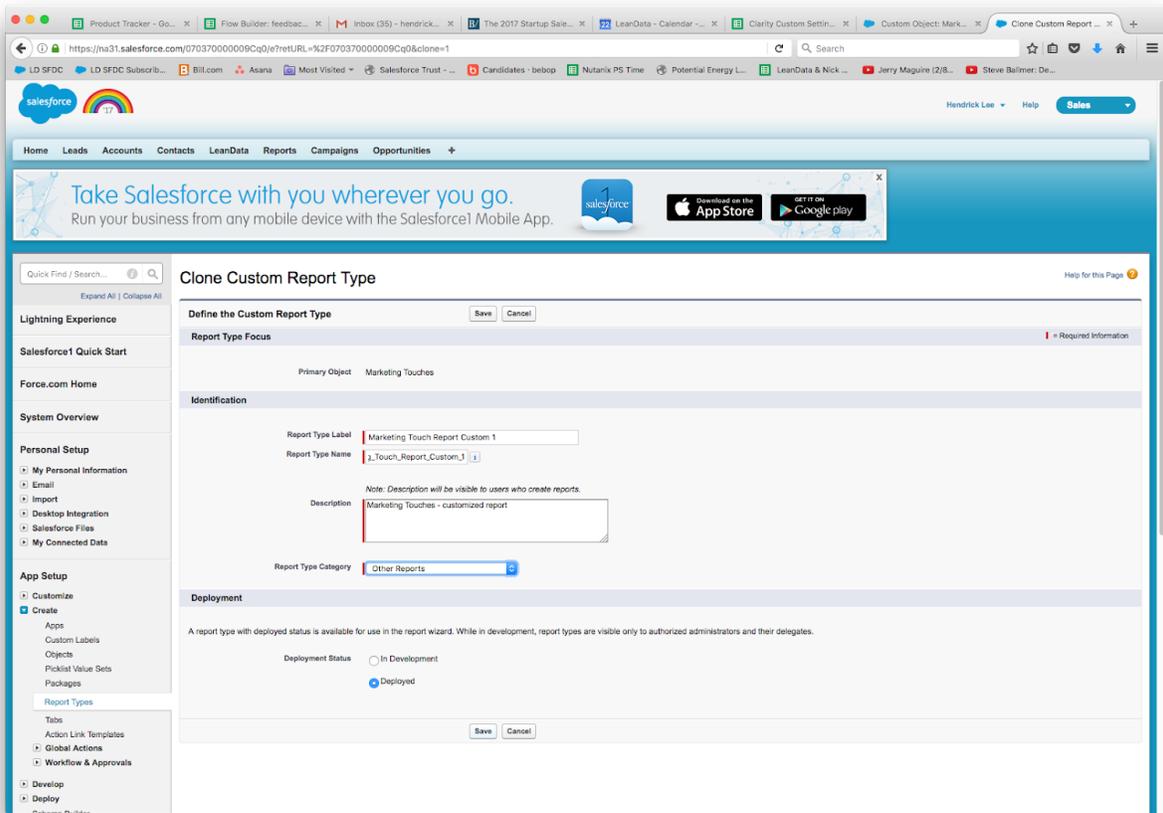
Field	Value
Report Type Label	Marketing Touch Report
Report Type Name	Marketing_Touch_Report
Namespace Prefix	LeanData
Installed Package	LeanData
Description	Marketing Touches
Created By	LeanData, 3/9/2018 1:52 PM
Modified By	LeanData, 2/10/2017 4:31 PM

The "Object Relationships" section shows a diagram with a circle labeled "A" (Marketing Touches) connected to a table icon labeled "A".

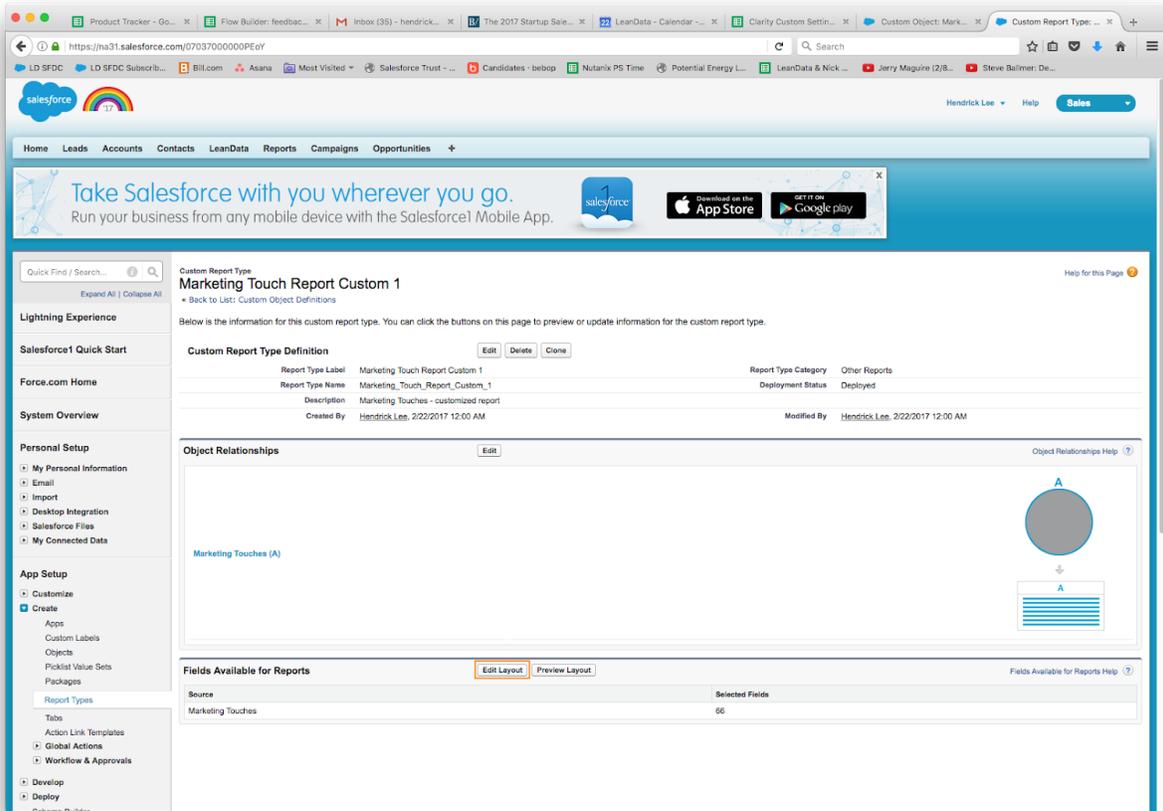
The "Fields Available for Reports" section shows a table with the following data:

Source	Selected Fields
Marketing Touches	66

2. Enter the new report type name and description, and click the [Save] button to create the new report type



3. Once the new Report Type has been created, click the [Edit Layout] button to custom the fields you would like included in this Report Type.



4. To add new fields of related objects (e.g Account, Lead, Contact, and Campaign fields)
 - Click [Add fields related via lookup >>](#)
 - In the subsequent screen, select the desired object and fields under those objects
 - Once you have added your desired fields, remember to [Save] your changes so they appear with the next report you created off this type

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Marketing Touch Report Custom 1

Set how fields display on the Select Columns page in the report wizard via this report type by selecting fields from the right-hand box and dragging them to a section on the left. Arrange fields on sections as they should appear to users in the report wizard. Fields not dragged onto a section will be unavailable to users when they generate reports from this report type.

- You can select and move multiple fields together by using Ctrl+click to select fields individually or Shift+click to select a group of fields.
- To rearrange the sections, select the section header and drag it to the desired location.

Field Layout Properties Save Cancel Preview Layout Total Fields in Layout: 66

Edit Properties Create New Section

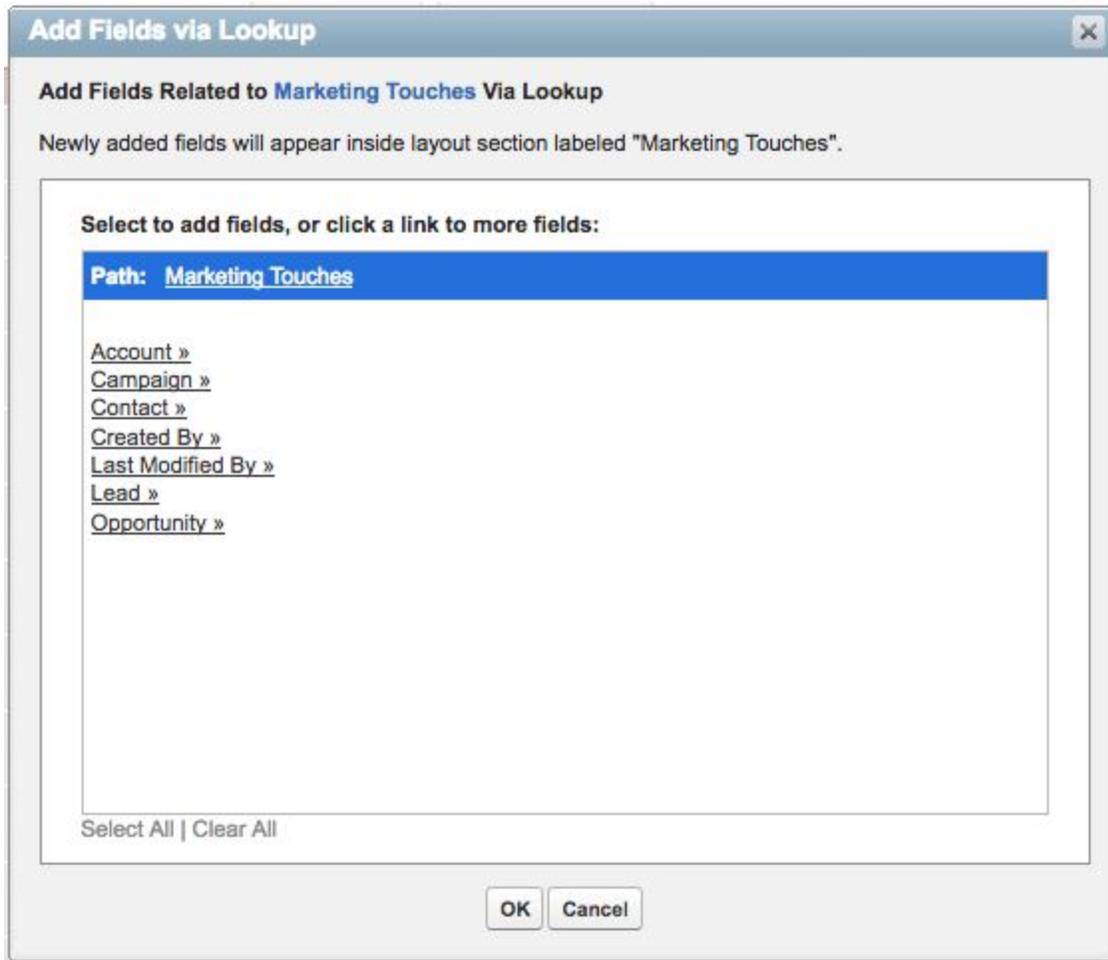
Marketing Touches				Edit Details
Account	Attribution V...	Campaign	Campaign Member	
Campaign Memb...	Campaign Memb...	Campaign Memb...	Campaign Type	
Campaign Type...	Contact	Contact Role	Cost Per Touch	
Created By	Created Date	Days To Oppor...	Days To Oppor...	
Last Modified...	Weighted FT A...	MT Attributio...	Last Modified...	
FT Bookings A...	Weighted MT A...	Lead	Weighted LT A...	
Marketing Tou...	Target Account	LT Attributio...	LT Generated ...	
MT Generated ...	MT Accelerate...	Weighted LT G...	✓ Marketing_T...	
Opportunity	Weighted MT A...	Weighted MT G...	Weighted MT A...	
Weighted FT B...	LT Attributio...	LT Generated ...	MT Generated ...	
MT Accelerate...	Opportunity C...	Opportunity S...	FT Attributio...	
Campaign Memb...	Opportunity S...	Opportunity T...	FT Attributio...	
Opportunity T...	Responded	MT Attributio...	Touch Order	
Touch Pre-Sales	Touch Pre-Opp...	Weighted FT A...	Weighted LT A...	
Weighted LT G...	Weighted MT G...	Weighted MT A...	Q Closed	
Q Amount	Q Stage	Q Won	Q Created Date	

Legend

- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

Marketing Touches Fields (74/104)

Account Attribution V...
 Campaign Campaign Member
 Campaign Memb... Campaign Memb...
 Campaign Memb... Campaign Memb...
 Campaign Type Campaign Type...
 Contact Contact Role
 Cost Per Touch Created By
 Created Date Days To Oppor...



5. To use this custom report type with all of your custom fields and our Marketing Touch fields, just create a new report via the Report menu. Make sure to select the custom report type with the name you selected in Step 2.