# 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  $\rightarrow$  App Setup  $\rightarrow$  Create  $\rightarrow$  Report Types
- Click [Clone] button to create a new version of the *Marketing Touch Report* that can include your custom fields



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



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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.



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- 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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Select to add fields, or click a link to more fields:	
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Select All   Clear All	<u></u>
OK Cancel	

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.