

# LeanData Attribution

Dashboards / Reporting Lookup Fix  
(1.518+)



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## Context

As part of our larger effort to optimize your Attribution runs, we have replaced the Marketing Touch object's Opportunity & Campaign Master-Detail relationships with new Lookup relationships (Related\_Campaign\_\_c and Related\_Opportunity\_\_c). Now, Attribution will run without locking any of your Opportunity or Campaign records. Furthermore, your run will no longer block any other processes in your Salesforce environment.

As part of this improvement, our standard report types have been modified to include our new lookups since they are part of our managed package. These lookups and their fields have replaced some of the older fields in our report types. As a result, some of the groupings in your standard reports are no longer present.

Our standard LeanData Attribution reports, standard dashboards, and any custom dashboards built off standard reports will need to be modified to include your desired fields. For example, if you are already grouping a report on the the Opportunity Created Date field, you will need to modify the report to group on the *Related* Opportunity Created Date field.

**Please use the below guide to quickly modify your standard LeanData Attribution reports. We have identified 3 standard Marketing Touch reports that require modification.**

1. Marketing Attribution by Won Opportunity
2. Generated Pipeline by Campaign Type
3. Marketing Attribution by Campaign

If you are using any other standard Marketing Touch reports in your dashboards, please visit the source report and group the report by the appropriate Related Opportunity or Related Campaign field.

*Please Note: Custom report types are not impacted by this change. LeanData Attribution contains new lookups, but we are populating your fields in your custom report type.*

## Identifying Impacted Dashboards

- Any impacted dashboard component will have the following text in red:
  - “Error: This report cannot be used as the source for this component. If it is a summary or matrix report, add one or more groupings in the report. If it is a tabular report with a row limit, specify the Dashboard Settings in the report”

- If this is the case, please visit the source report and group by the correct Related Campaign or Related Opportunity field.

## Accessing your LeanData Attribution Reports

- Navigate to [Dashboards](#) in Salesforce Sales Cloud
- In the QuickFind bar, search [LeanData Marketing Attribution Dashboard](#)

## Standard Reports to be Updated

### Marketing Attribution by Won Opportunity

1. Navigate to the [Marketing Attribution by Won Opportunity](#) report
2. Select Customize
3. Group By [Related Opportunity: Opportunity Name](#)
4. Sort By [Related Opportunity: Opportunity Name](#) descending
5. Save Report
6. Navigate back to your [Marketing Attribution Dashboard](#)
7. Refresh the dashboard

### Generated Pipeline by Campaign Type

1. Navigate to the [Generated Pipeline by Campaign Type](#) report
2. Select Customize
3. Group By [Related Opportunity: Created Date](#)
4. Group Dates By (dropdown on the Related Opportunity Created Date field): [Fiscal Quarter](#)
5. Save Report
6. Navigate back to your [Marketing Attribution Dashboard](#)
7. Select Edit
8. Within the FT Attribution Generated by Channel section, select the wrench icon (Edit Attributes)
9. Navigate to the Component Data tab
10. In the X axis dropdown, select [Related Opportunity: Created Date](#)
11. Click OK
12. Refresh the dashboard

## Marketing Attribution by Campaign

1. Navigate to the [Marketing Attribution by Campaign](#) report
2. Select Customize
3. Group By [Related Campaign: Campaign Name](#)
4. Sort By [Related Campaign: Campaign Name](#) descending
5. Save Report
6. Navigate back to your [Marketing Attribution Dashboard](#)
7. Refresh the dashboard

Please reach out to [support@leandatainc.com](mailto:support@leandatainc.com) with questions or for further guidance