LeanData Engagement

How to Create a Custom Report Type

Overview

LeanData's Engagement product unlocks data & insights from your own Salesforce instance by recording relevant Sales and Marketing Engagements onto the LD Engagements Object.

In order to take full advantage of these insights, you may incorporate your own custom fields onto the LD Engagements Object.

Why do I need to create a Custom Report Type?

By default, LeanData is limited to a certain number of fields by Salesforce. More importantly, as a part of the LeanData managed package, LeanData's standard Engagements report type cannot include any of your custom fields by default.

If you want to pull in more fields into your Engagement reports such as "Target Account" or custom fields, you will need to create a custom report type.
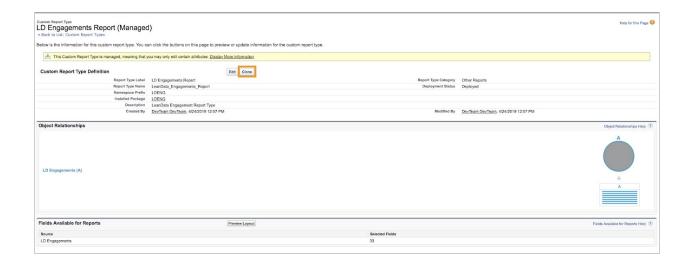
The LD Engagements Object interacts with many of the standard objects in your SFDC environment and you can pull in fields via lookups from the following objects: Accounts, Account Intelligence Metrics, Users, Leads, Contacts, and Campaign..

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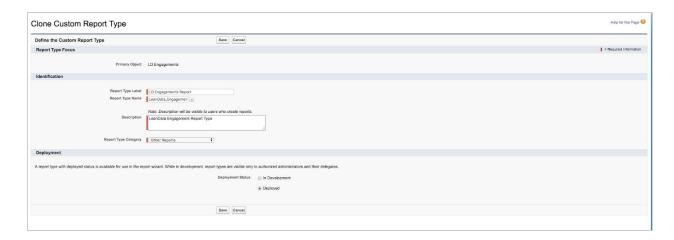
Creating a Custom Report Type

1. To create a custom report, clone the **LD Engagements Report (Managed)** Report Type
   - Navigate to Setup → App Setup → Create → Report Types
   - Click **Clone** button to create a new version of the **LD Engagements Report** that can include your custom fields
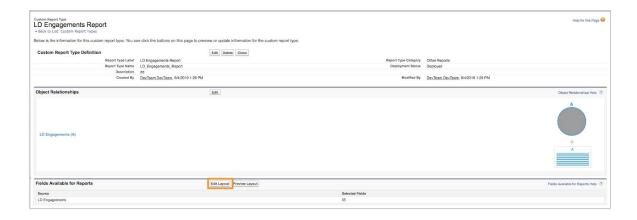
2. Enter the new report type name and description, and click the **Save** button to create the new Report Type.
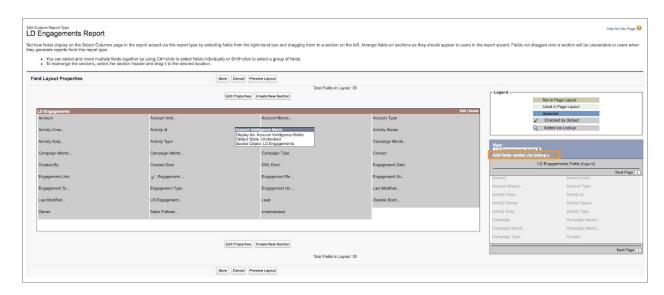

3. Once the new Report Type has been created, click the **Edit Layout** button to customize the fields you would like included in this Report Type.
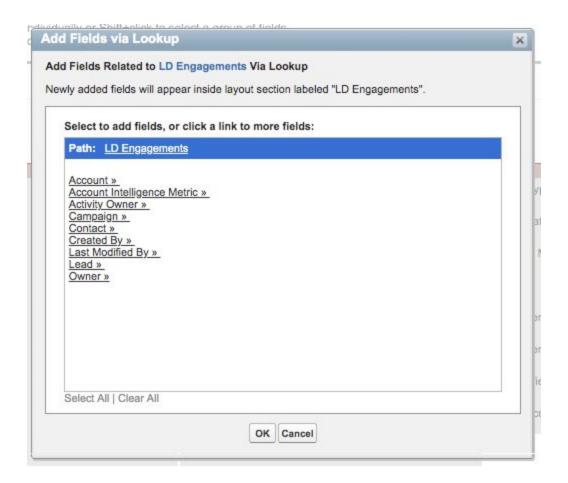
4. To add new fields of related objects (e.g Account, Account Intelligence Metrics, Lead, Contact, and Campaign fields)

- 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

5. To use this custom report type with all of your custom fields and our LD Engagement 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.