

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

Custom Report Type
LD Engagements Report (Managed) Help for this Page ?

[Back to List: Custom Report Types](#)

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

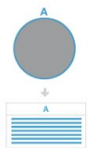
[This Custom Report Type is managed, meaning that you may only edit certain attributes. Display More Information](#)

Custom Report Type Definition [Edit](#) [Clone](#)

Report Type Label	LD Engagements Report	Report Type Category	Other Reports
Report Type Name	LeanData_Engagements_Report	Deployment Status	Deployed
Namespace Prefix	LDENG		
Installed Package	LDENG		
Description	LeanData Engagement Report Type		
Created By	DevTeam DevTeam, 4/24/2019 12:57 PM	Modified By	DevTeam DevTeam, 4/24/2019 12:57 PM

Object Relationships [Object Relationships Help ?](#)

LD Engagements (A)



Fields Available for Reports [Fields Available for Reports Help ?](#)

Source	Selected Fields
LD Engagements	33

2. Enter the new report type name and description, and click the **Save** button to create the new Report Type.

Clone Custom Report Type Help for this Page ?

Define the Custom Report Type [Save](#) [Cancel](#)

Report Type Focus = Required Information

Primary Object LD Engagements

Identification

Report Type Label

Report Type Name

Description
Note: Description will be visible to users who create reports.

Report Type Category

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status In Development Deployed

[Save](#) [Cancel](#)

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.

Custom Report Type
LD Engagements Report Help for this Page

[Back to List: Custom Report Types](#)

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition [Edit](#) [Delete](#) [Clone](#)

Report Type Label	LD Engagements Report	Report Type Category	Other Reports
Report Type Name	LD_Engagements_Report	Deployment Status	Deployed
Description	dit	Modified By	DevTeam DevTeam, 6/4/2019 1:28 PM
Created By	DevTeam DevTeam, 6/4/2019 1:28 PM		

Object Relationships [Object Relationships Help](#)

LD Engagements (A)

Fields Available for Reports [Fields Available for Reports Help](#)

[Edit Layout](#) [Preview Layout](#)

Source: LD Engagements Selected Fields: 35

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

Edit Custom Report Type
LD Engagements Report Help for this Page

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](#)

[Edit Properties](#) [Create New Section](#) Total Fields in Layout: 35

LD Engagements			
Account	Account Intel...	Account Mima...	Account Type
Activity Crea...	Activity Id	Account Intelligence Metrics	Activity Status
Activity Subj...	Activity Type	Display As: Account Intelligence Metric	Campaign Memb...
Campaign Memb...	Campaign Memb...	Default State: Unchecked	Contact
Created By	Created Date	Source Object: LD Engagements	Engagement Date
Engagement Link	✓ Engagement ...	Campaign Type	Engagement Sc...
Engagement To...	Engagement Type	DML Error	Last Modified...
Last Modified...	LD Engagement...	Engagement Re...	Outside Scort...
Owner	Sales Followe...	Lead	
		Unprocessed	

[Edit Properties](#) [Create New Section](#) Total Fields in Layout: 35

[Save](#) [Cancel](#) [Preview Layout](#)

Legend

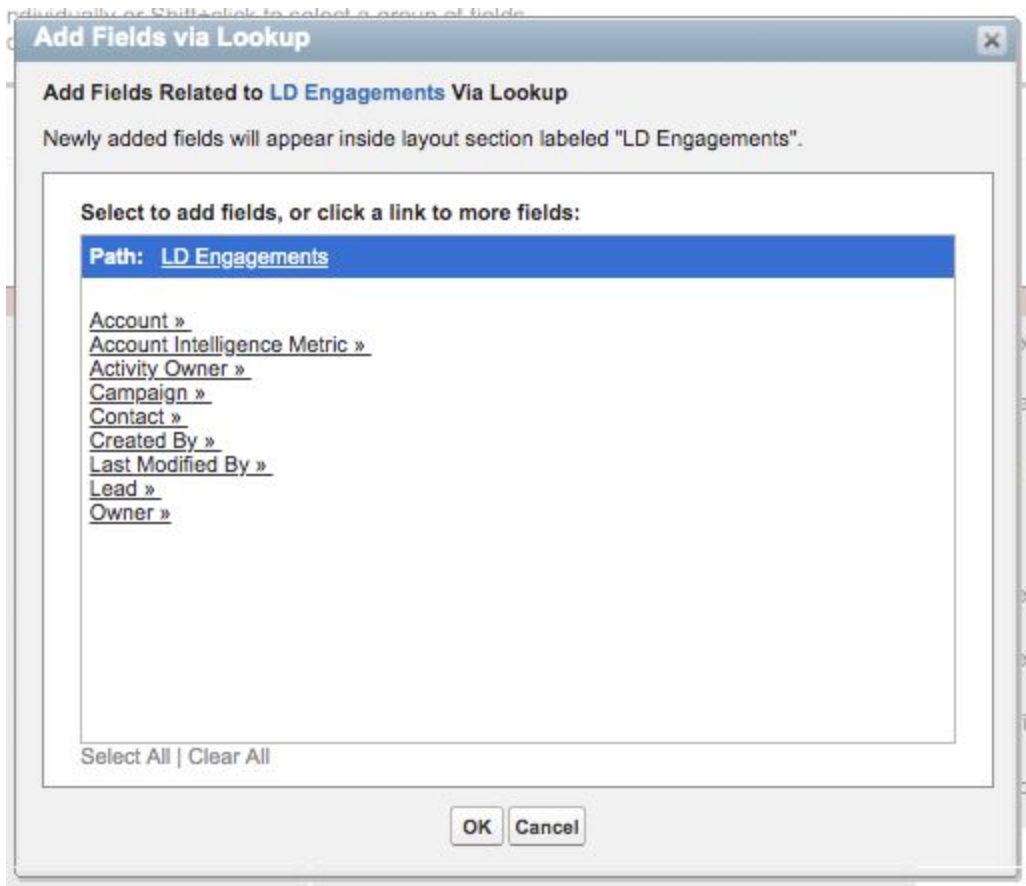
- Not in Page Layout
- Used in Page Layout
- Selected
- Checked by Default
- Added via Lookup

View:
LD Engagements Fields (Page 1/2)
[Add fields related via lookup >>](#)

LD Engagements Fields (Page 1/2)

Account	Account Intel...	Account Type	Next Page
Account Mima...	Account Type	Activity Id	
Activity Crea...	Activity Id	Activity Status	
Activity Owner	Activity Status	Activity Type	
Activity Subj...	Activity Type	Campaign Memb...	
Campaign	Campaign Memb...	Campaign Memb...	
Campaign Memb...	Campaign Memb...	Contact	
Campaign Type	Contact		

Next Page



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.