

# **QUICK START GUIDE**

servicedirect LOGOUT Dashboard Leads Campaigns

# LEAD MANAGER

### 1. Lead Performance Metrics

Useful stats about all your Leads. Blue links are clickable to view those specific Leads and Question Mark Icons show more info. Some Metrics are locked until enough Leads have been Managed.

### 2. Currently Filtered Leads

The top of the Lead Manager table shows a plain-English sentence describing the Leads you're currently viewing and which Filters are active. There is also a View Performance Metrics link to show you stats about just these Filtered Leads.

#### 3. Filter & Search Leads

This section includes commonly used Quick Filters as well as an advanced Search and Filter button that offers many options to help you easily find specific Leads.

## 4. Expanded Lead Details

Clicking any collapsed Lead row will expand it to show you detailed Lead info and available actions and will highlight the row with a light green background.

# 5. Call Recording Audio and Form Message

Phone Call Leads display the Call Recording audio player with options to adjust playback speed, jump forwards and backwards, and download the call. Form Leads display the Form Message and contact info instead of the audio player.

# 6. Track Lead Progress and ROI

Your Tracking Lead Progress helps us optimize your Campaigns over time and helps you manage your customer outreach. Options include whether a call was answered, an appointment was booked, and a job was won. Enter Revenue to track your Return On Investment (ROI) or enter a Lost Reason for Jobs you didn't win.

# 7. Follow-Up & Starred Leads

Click the Follow-Up or Starred toggles, to turn them off (grey) or on (orange) and the lefthand column of the Lead Row will display the matching icon.

### 8. Lead Status & Lead Review

This section shows whether a Lead is **Billable or Non-Billable**. You may also Submit a Lead for Review and the Review Status will display here when applicable.

### 9. Lead History and Notes

The Lead History shows the actions that have happened on a Lead along with the timestamp and username. You may also add your own freeform Notes.







All Time ?

Last 90 Days ®

Managed ROI Last 90

Days 3 78% Confidence

Call Answered Rate Last 90 Days 86% Confidence

Job Won Rate Last 90

Days ? 82% Confidence

(?) Want More Leads?

# **Lead Manager**

Showing 1-25 of 36 Leads in Service Category Plumbing from Last 7 Days View Performance Metrics Export to CSV

Quick Filters: Follow-Up . Starred . Unmanaged . Partially Managed . Fully Managed . All

Billable Leads Only Q SEARCH FILTER

▲ FOLLOW-UP ★ STARRED

**Lead Status** 

Lead Review

\$465.00

\$1,700.00

\$850.00

\$0.00

Submit for Review

\$94.00

\$94.00

\$78.00

\$94.00

\$94.00

2:45

1:56

Billable



		Date	Progress	Campaign	Name / Caller ID	Contact Details	Duration	Cost ②	Revenue ②
	O A *	11:33 pm 03/19/19	Potential Job	Your Awesome Campaign	Aretha Franklin	(512) 123 4567	3:14	\$94.00	
4	O A *	<b>9:47</b> am 03/19/19	Booked Appt. Job Won	Super Cool Services	Stevie Ray Vaughan	(512) 456 6677	2:32	\$78.00	\$875.00

Listen to Call Last played 11/02/20 2:32pm by leader@customeremail.com









(+) Add Note

(512) 713 3009

(512) 988 0987





Job Won

Booked Appt.

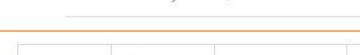


Your Awesome Campaign

Your Awesome Campaign



Quality Check Performed: This Lead was automatically reviewed by our system. 06/25/19 11:28 by Service Direct Quality Check



5:04 pm

03/17/19

10:19 am



Unknown Caller

Mahatma Gandhi





# **QUICK START GUIDE**

# CAMPAIGNS MANAGER

## 1. Currently Filtered Campaigns

As with Lead Manager, the top of Campaigns Manager displays a plain-English description of which Campaigns you're currently viewing.

# 2. Find Your Campaigns - Filter & Search

Click to open a popup enabling Filtering and Search to find specific Campaigns.

## 3. Bulk Edit Campaigns

Select multiple Campaigns with the checkboxes next to each Campaign Name and click "Bulk Edit Selected Campaigns" to batch update Cost Per Lead (CPL), Lead Delivery Settings, and Campaign Status.

# 4. Download Campaign Reports

Use this link to download a variety of reports about your Campaigns.

### **5. Select Campaigns**

Select Campaigns include optimized Microsites and custom Search Ads to generate potential customers. Learn More about Select Campaigns.

- 5A Campaign Name, Campaign Start Date, Microsite Screenshot.
- 5B Leads Received All Time and Last 30 Days (click to view in Lead Manager).
- 5C Cost Per Lead (CPL) (click to Edit).
- 5D Lead Delivery & Notifications (set where you receive Phone Call Leads, set Caller ID preferences, and set various Notifications).
- 5E Update Campaign Status, including Enabling or Pausing the Campaign and set Campaign Schedule for specific times of the day.
- 5F View Campaign Microsite and Request Content Edit.

### 6. Marketplace Campaigns

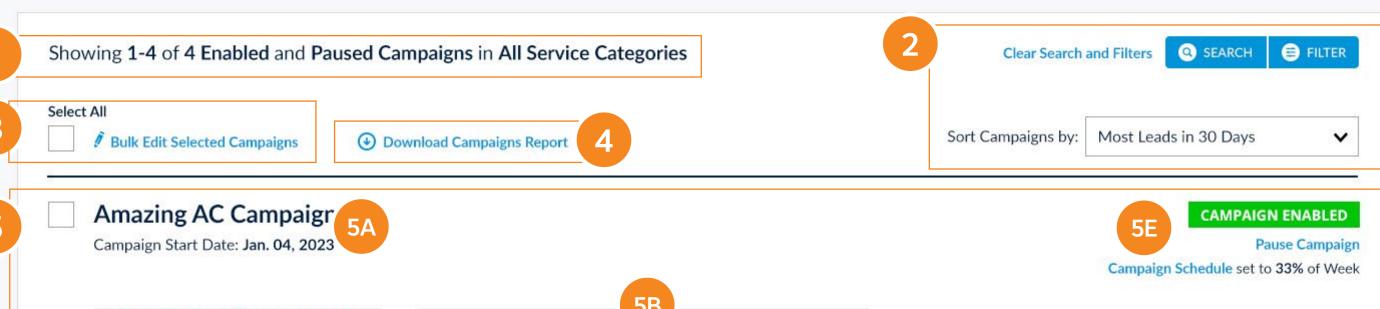
Marketplace Campaigns leverage our Marketplace Platform to bring more Leads in some Service Categories. Learn More about Marketplace Campaigns.

- 6A Campaign Name, Campaign Start Date.
- 6B Leads Received All Time and Last 30 Days (click to view in Lead Manager).
- 6C Cost Per Lead (click to Edit).
- 6D Lead Delivery & Notifications (set where you receive Phone Call Leads, set Caller ID preferences, and set various Notifications).
- 6E Update Campaign Status, including Enabling or Pausing the Campaign and Set Campaign Schedule for specific times of the day.
- 6F Service Area Zip Codes (click to Download, View All, or Edit).



# **Campaigns Manager**

REQUEST NEW CAMPAIGN





**1693** Leads 92 Leads Received Last 30 Days Received All Time



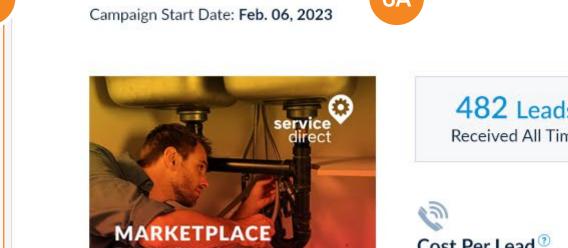


(512) 124 4567

clientperson@emailserver.com Caller ID: Show Tracking Number - (469) 410-7732

(512) 415 3506





Marketplace - Plumbing







Caller ID: Show SD Lead Caller ID Number (512) 877-3656

(512) 415 3506



Download ! Edit



92109, 91902, 91901, 92079, 92083, 92082, 91912. 91911, 91914, 92079, 92083, 92082, 91912, 91914, 92083, 92082, 91912, 91911, 91914, 91902, 91901, 92079, 92083, 92082, 91912, 91911, 91914, 92079, 92083, 92082, 91902, 91901, 92079, 92083, 92082, 91912, 91911, 91914, 92079, 92083, 92082, 91902, 91901, 92079, 92083, 92082, 91912, 91911, 91914, 92079, 92083, 92082, 92079, 92082, 92079, 92083... View All