



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.

VISIT OUR HELP CENTER FOR MORE ARTICLES AND VIDEOS

15Leads Marked for Follow-Up

845Billable Leads All Time

224Billable Leads Last 90 Days

568%Managed ROI Last 90 Days
78% Confidence

91%Call Answered Rate Last 90 Days
86% Confidence

67%Job Won Rate Last 90 Days
82% Confidence

Lead Manager

[Want More Leads?](#)

2Showing 1-25 of 36 Leads in Service Category Plumbing from Last 7 Days

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

[View Performance Metrics](#) [Export to CSV](#)

Billable Leads Only SEARCH FILTER

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

5Listen to Call
Last played 11/02/20 2:32pm by leader@customeremail.com

7FOLLOW-UP STARRED

6Lead Progress and Revenue
Managing Progress helps us optimize your Campaigns and adding Revenue helps show your ROI.

Call Answered

Booked Appointment

Job Won

Revenue

Yes No

Yes No

Yes No

8Lead Status
Billable
QUALITY CHECK
Lead Review
Submit for Review

9Lead History

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

Lead opened for the first time.
06/25/19 11:28 by leader@customeremail.com

	2:15 pm 03/18/19	Unmanaged	Your Awesome Campaign	Form Filla Jr.	nicecustomer@email.com (512) 123 4567	--	\$94.00	--
	1:43 pm 03/18/19	Booked Appt. Job Won	Your Awesome Campaign	Mick Jagger	(512) 887 3467	2:17	\$94.00	\$465.00
	8:22 am 03/18/19	Job Won Reviewed Billable	Super Cool Services	Tom Petty	(512) 123 3467	12:18	\$78.00	\$1,700.00
	5:04 pm 03/17/19	Job Won	Your Awesome Campaign	Unknown Caller	(512) 713 3009	2:45	\$94.00	\$850.00
	10:19 am 03/17/19	Booked Appt. Job Won	Your Awesome Campaign	Mahatma Gandhi	(512) 988 0987	1:56	\$94.00	\$0.00

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](#)

Showing 1-4 of 4 Enabled and Paused Campaigns in All Service Categories

☐ Select All
[Bulk Edit Selected Campaigns](#)

[Download Campaigns Report](#)

[Clear Search and Filters](#)

Sort Campaigns by: Most Leads in 30 Days ▼

☒ **Amazing AC Campaign** 5A
Campaign Start Date: Jan. 04, 2023

5E **CAMPAIGN ENABLED**
[Pause Campaign](#)
Campaign Schedule set to **33%** of Week

5B **1693 Leads**
Received All Time

92 Leads
Received Last 30 Days

5C **Cost Per Lead** [Edit](#)
\$105.00 Cost Per Lead

5F **Campaign Site**
[View Campaign Site](#)
[Request Content Edit](#)

5D **Lead Delivery & Notifications** [Edit](#)
Calls: (512) 124 4567
Email: clientperson@emailserver.com
Caller ID: Show Tracking Number - (469) 410-7732
SMS: (512) 415 3506

☒ **Marketplace – Plumbing** 6A
Campaign Start Date: Feb. 06, 2023

6E **CAMPAIGN ENABLED**
[Pause Campaign](#)
Campaign Schedule set to **18%** of Week

6B **482 Leads**
Received All Time

146 Leads
Received Last 30 Days

6C **Cost Per Lead** [Edit](#)
\$82.00 Cost Per Lead

6F **Service Area Zips** [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](#)

6D **Lead Delivery & Notifications** [Edit](#)
Calls: (512) 124 4567
Email: clientperson@emailserver.com
Caller ID: Show SD Lead Caller ID Number (512) 877-3656
SMS: (512) 415 3506