

LEAD MANAGER

1. Performance Metrics

Here you'll see statistics about all your Leads. Blue links are clickable to view those specific Leads and Question Mark Icons are clickable to see more explanations. Some Performance Metrics are locked until enough Leads have been Managed.

2. Currently Filtered Leads

At the top of the Lead Manager table, you'll always see 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 Leads.

3. Find Your Leads – Filter & Search

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. View Your Leads – Expanded Lead

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

5. View Your Leads – Call Recording

Phone Leads display the Call Recording audio player with options to adjust playback speed, jump forwards and backwards, and download the call.

6. Manage Your Leads – Track Lead Progress and Revenue

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. Leads Marked for Follow-Up & Starred Leads

If you click the Follow-Up or Starred toggle items they will turn orange from grey and the lefthand column of the Lead Row will display the matching icon.

8. Lead Status

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.

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servicedirect Dashboard **Leads** Campaigns More LOGOUT

1 **5** Leads Marked for Follow-Up ? **845** Billable Leads All Time ? **224** Billable 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 Want More Leads?

2 Showing **1-25** of **36** Leads in Service Category **Plumbing** from **Last 7 Days** Quick Filters: **Follow-Up** • **Starred** • **Unmanaged** • **Partially Managed** • **Fully Managed** • **All** Billable Leads Only SEARCH FILTER

3

	Date	Progress	Campaign	Name / Caller ID	Contact Details	Duration	Cost ?	Revenue ?
4	11:33 pm 03/19/19	Potential Job	Your Awesome Campaign	Aretha Franklin	(512) 123 4567	3:14	\$64.00	--
5	9:47 am 03/19/19	Booked Appt. Job Won	Super Cool Services	Stevie Ray Vaughan	(512) 456 6677	2:32	\$68.00	\$875.00

6 **Listen to Call** Last played 11/02/20 2:32pm by leader@customeremail.com FOLLOW-UP STARRED

7 1:19 / 2:32 Download Call

8 **Lead Progress and Revenue** ?
Managing Progress helps us optimize your Campaigns and adding Revenue helps show your ROI.

Call Answered **Booked Appointment** **Job Won** **Revenue** SAVED

Yes No
 Yes No
 Yes No
 SAVED

9 **Lead History** Add Note

Note added: Appointment set for next week. Needs pricing for full AC install and replacement parts.
06/25/19 11:28 by leader@customeremail.com

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

10	2:15 pm 03/18/19	Unmanaged	Your Awesome Campaign	Form Filla Jr.	nicecustomer@email.com (512) 123 4567	--	\$64.00	--
	1:43 pm 03/18/19	Booked Appt. Job Won	Your Awesome Campaign	Mick Jagger	(512) 887 3467	2:17	\$64.00	\$465.00
	8:22 am 03/18/19	Job Won Reviewed Billable	Super Cool Services	Tom Petty	(512) 123 3467	12:18	\$68.00	\$1,700.00
	5:04 pm 03/17/19	Job Won	Your Awesome Campaign	Unknown Caller	(512) 713 3009	2:45	\$64.00	\$850.00
	10:19 am 03/17/19	Booked Appt. Job Won	Your Awesome Campaign	Mahatma Gandhi	(512) 988 0987	1:56	\$64.00	\$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

Use the Filter dropdowns or the Search box 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 those Campaigns. Options include making edits to Cost Per Lead (CPL), Campaign Site Content, Lead Delivery Settings, and Campaign Status.

4. Download Campaign Reports

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

5. Campaign Details

Each Campaign row displays Campaign-specific information and the ability to edit many of them. These include:

- Leads from All Time and from the Last 30 Days
- Cost Per Lead (CPL)
- Campaign Status, including Enabling a Paused Campaign
- Link to view your Campaign Site as your customers see it
- Campaign Site Content Edit Request
- Lead Delivery Settings

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Campaigns Manager

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

Filters:

Enabled, Paused ▼

All Service Categories ▼

[Reset Filters](#)


Search by Keyword SEARCH

[Clear Search](#)

Select All [Bulk Edit Selected Campaigns](#) [Download Campaigns Report](#) Sort Campaigns by: Most Leads in 30 Days ▼

Amazing AC Campaign

Campaign Start Date: Nov. 12, 2019



168 Leads

All Time

41 Leads

Last 30 Days

\$78.00

Cost Per Lead [Edit](#)

ENABLED

[Update Campaign Status](#)

Campaign Site

[View Campaign Site](#)

[Request Content Edit](#)

Lead Delivery

Calls: (512) 124 4567

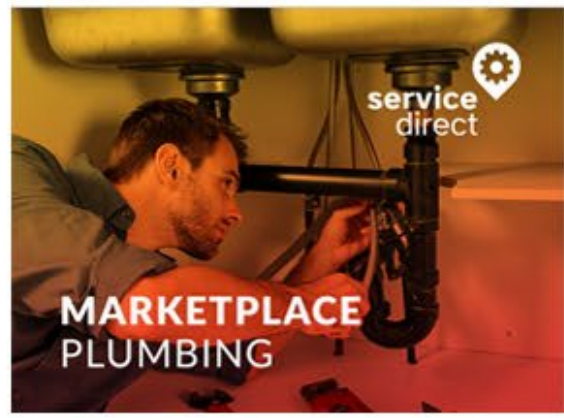
Forms: clientperson@emailserver.com

Caller ID: Show Tracking Number - (469) 410-7732

[Edit](#)

Marketplace – Plumbing

Campaign Start Date: Jan. 23, 2020



122 Leads

All Time

39 Leads

Last 30 Days

\$67.00

Cost Per Lead [Edit](#)

ENABLED

[Update Campaign Status](#)

Service Area Zips

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

[Edit](#)

Lead Delivery

Calls: (512) 877 4598


Forms: companyemailhere@coolcompany.com, yeatanother@emailaddress.com

Caller ID: Show the Caller ID of the Phone Lead

[Edit](#)

This Is An Amazing Campaign

Campaign Start Date: Feb. 08, 2019



2877 Leads

All Time

9 Leads

Last 30 Days

\$74.00

Cost Per Lead [Edit](#)

ENABLED

[Update Campaign Status](#)

Campaign Site

[View Campaign Site](#)

[Request Content Edit](#)

Lead Delivery

Calls: (512) 124 4567, (512) 890 7654

Forms: anotherperson@iowntheworld.com

Caller ID: Show Tracking Number - (469) 410-7732

[Edit](#)