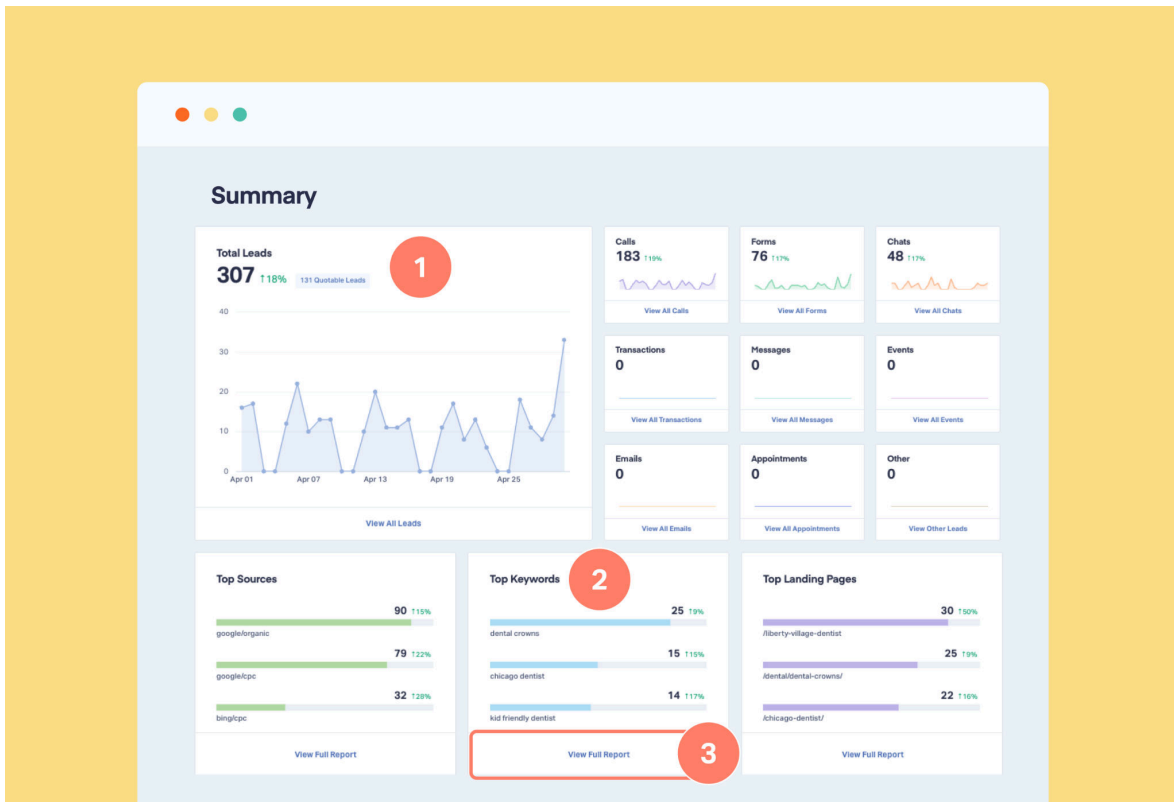


HOW-TO GUIDE

Access Marketing Insights

1 Using the Summary Report

The Summary Report provides a **30-second marketing health check** across all channels and lead types.

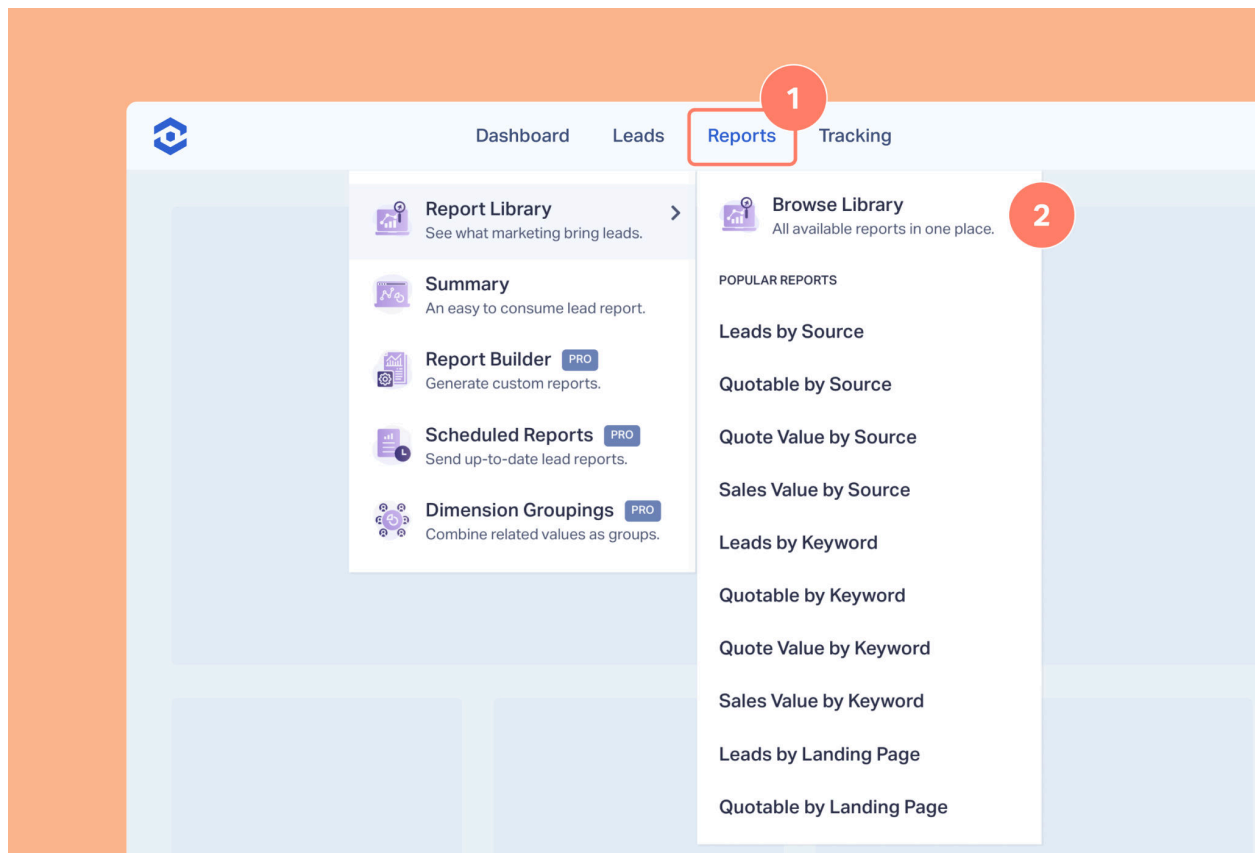


1. In the top menu, click **Reports** → **Summary**. Here you can see:
 - a. **Total leads**
 - b. **Increase** in total leads

- c. Total **quotable** leads
 - d. Leads by **type**
2. View top lead-generating **Sources, Keywords, and Landing Pages**
3. Click **View Full Report** to dive deeper into any aspect of the Summary

2 Using the Report Library

Pre-built report templates help you analyze marketing performance through multiple dimensions like **source, keyword, and landing page**.



In addition to using the **Summary Report**, you can also access full reports by:

1. Clicking **Reports**
2. Click **Report Library**

The screenshot displays a 'Lead Details' interface for a lead named Jenn Soretooth. It includes sections for Customer Journey, Call Recording, and Custom Fields. Red callouts are placed over the interface: callout 4 points to the Custom Fields section, callout 5 points to the Lead Score and Quotable status, and callout 6 points to the Next Lead navigation button.

Lead Details	
 Jenn Soretooth j.soretooth@gmail.com (404) 790-2278	Lead Score 90 pts
	Quotable Yes
	Quote Value \$1,250
	Sales Value \$1,250

Customer Journey

- Jan 22, 2024 at 3:05pm
Visit to website from Google Ads
Keyword: root canal miami
Campaign: Root Canal
Page: /dental/root-canal
- Jan 22, 2024 at 3:12pm
Phone call via Tracking Number

Call Recording
From Jan 22, 2024 at 3:12pm

How can I help you?
I need a root canal. May I schedule an appointment?
Sure! How does Friday at 3pm sound?

Custom Fields

Appointment Status	Booked
Procedure	Root Canal

< Previous Lead Next Lead >

3. Use the dropdown menus to choose **what to report on** (e.g. keywords, sources, or landing pages)
4. Select **how you want to measure** (e.g. by leads, by sales value, etc.)
5. Use **filters** to narrow your report content