Lead Sources FAQ

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Lead sources are your own list, apply per buyer and seller side, and show up on reports. Answers to the common questions about tracking both sides, reporting, and switching from labels.

Can I track a buyer and a seller lead source separately?

Yes. Every transaction can carry one lead source for the buyer side and one for the seller side, so you can see where each half of a deal came from.

Where do lead sources show up on reports?

On your spreadsheets and commission reports. Downloaded Transaction Spreadsheets include lead sources, and so do Commission Module reports like the Lead Sources Report, Commission and Closings Report, Pending Commissions Report, Agent Income Report, and Agent Units Report.

Should I use labels or lead sources to track where leads come from?

Lead sources. Labels are meant for property type; lead sources are purpose-built for where a deal originated and feed the reports designed for it.

I've been using labels for this — can I switch?

Yes, and we can help. Email help@paperlesspipeline.com and we'll help convert your labels over to lead sources.

Can I search for transactions by lead source?

Yes. In the search box at the top left of any page, choose lead-source from the dropdown, type all or part of the name, and search.

Who can add or rename lead sources?

The master admin. Your lead source list lives in your admin settings so it stays consistent, while anyone adding or editing a transaction can apply one.

Learn More

Track where your business comes from by tagging each transaction with its lead source, then measure what's working on reports.

See Lead Sources

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.