Lead Sources

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

Introduction

Marketing spend is easy to justify and hard to prove. You know roughly where business comes from, and roughly is where the argument starts whenever somebody asks whether the lead subscription is worth renewing.

A lead source is the answer to where a deal originated, recorded on the transaction while somebody still remembers. Your office defines its own list once, so the choices are your channels rather than a generic set, and a deal carries a source for the buyer side and one for the seller side, because the two halves rarely come from the same place. It gets recorded as the transaction is created, which is deliberate. Nobody reconstructs the origin of a deal six months later.

So the question stops being a memory test. Sources come out on your reports next to the deals and the money attached to them, and a year of tagging turns into a straight answer about which channels produce and which ones only look busy. This is also the right home for that job, so if you've been carrying it in labels, it belongs here instead.

How It Works

Lead sources are your own custom list, they apply per side of a transaction, and they flow straight into your reports.

Buyer and Seller Lead Sources

Each transaction can carry a lead source for the buyer side and one for the seller side, so you can see where both halves of a deal came from.

Lead Sources on Reports

Once applied, lead sources appear in your downloaded Transaction Spreadsheets and in Commission Module reports — including the Lead Sources Report, Commission and Closings Report, Pending Commissions Report, Agent Income Report, and Agent Units Report.

Lead Sources vs. Labels

Lead sources are the right home for where business comes from. If you've been using labels to track that, we recommend switching to lead sources — reach out and we can help convert your account.

Add a Lead Source

> Create a new lead source from the Lead Sources page in your admin settings.

Who Can Do This: The master admin.

To add a lead source:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Lead Sources] from the left menu.
3. Click [Add Lead Source].
4. Enter the name for this lead source.
5. Click [Add Lead Source] to save it.

The lead source is now available to apply to transactions.

Rename a Lead Source

Update the name of an existing lead source from the Lead Sources page.

Who Can Do This: The master admin.

To rename a lead source:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Lead Sources] from the left menu.
3. Click the [gear] to the right of the lead source, then [Rename].
4. Type the new name and save.

The renamed lead source updates everywhere it's applied.

Apply a Lead Source to a Transaction

Choose the buyer and seller lead source while adding or editing a transaction.

Who Can Do This: Anyone adding or editing a transaction, subject to their permissions.

To apply a lead source to a transaction:

1. Create or edit the transaction.

2. Select the buyer lead source and/or the seller lead source.

3. Save the transaction.

The lead sources are now stored on the transaction and will appear on your reports.

Search for Transactions by Lead Source

Find every transaction tagged with a given lead source from the search box.

Who Can Do This: Anyone, within their access.

To search for transactions by lead source:

1. Click in the search box at the top left of any page.

2. Select lead-source from the dropdown, then type all or part of your lead source.

3. Click the green search icon.

Your results show the matching transactions for that lead source.

See What Each Source Actually Produced

A year of tagging is only worth the tagging if somebody reads it back. The report that does that belongs to the Commission Module, so it's waiting for you if your account has the module and absent if it doesn't.

Find out which lead sources actually produce. Closings, commission, and sales volume are broken out by where the business came from.

See Lead Sources Report

Lead Sources FAQ

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. See Lead Sources FAQ.