Prove Which Lead Sources Actually Produce

Last Modified on 09/04/2026 11:15 am EDT

Every office has an opinion about where its business comes from. Tag the transactions and you can stop guessing — closings, commission, and volume, broken out by source.

Introduction

Lead Sources is a small feature with one setup step people miss: until a master admin defines the list, the field doesn't appear on a transaction at all. That's why offices sometimes conclude Pipeline doesn't have lead source tracking. They went looking on a transaction before anyone built the list.

Once the list exists, each transaction gets a lead source on the buyer side and one on the seller side, which is the detail that makes the reporting worth having: a referral that produced the listing and a portal lead that produced the buyer are two different facts about the same deal.

When to Use This

- You're deciding whether to renew a portal contract and want to know what it actually produced.
- Your broker asks what percentage of business comes from past clients and nobody knows.
- You went looking for a Lead Source field on a transaction and it isn't there.
- You've been tracking lead sources with transaction labels and want them in the real field.
- You need one agent's lead source numbers rather than the whole company's.

1. Define Your Lead Sources First

A master admin sets up the list in your company settings — the sources your office actually uses, named the way your team says them. Keep it short; a list of forty is a list nobody picks from accurately.

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

See Lead Sources

2. Tag Both Sides of Each Deal

With the list in place, two dropdowns appear when a transaction is edited — **Buyer Lead Source** and **Seller Lead Source**. Fill in whichever side you brought. On a double-sided deal, fill in both.

See and update the information that makes up a transaction — its dates, prices, agents, docs, and more.

See Transaction Details

> The habit is what makes this work. Most offices add a checklist task on transaction creation — *Set lead source* — because a field that gets filled in eighty percent of the time produces a report nobody trusts.

3. Go Back and Tag What You Already Have

Lead sources aren't limited to new transactions; you can set one on any existing transaction by editing it. A pass over last year's closings gives your first report something to say instead of waiting a year to find out.

If you've been using transaction labels for this — plenty of offices did, before the field existed — support can convert those label values into real Lead Source values in bulk, and then the old labels can go. Send them your label names and what each should become.

Labels classify your transactions by property type, and they drive the checklists Pipeline auto-assigns.

See Transaction Labels

4. Read the Results

Offices on the Commission Module get this handed to them: the Lead Sources Report breaks closings, commission, and sales volume out by source for whatever period you choose.

Without it, the same answer comes out of a spreadsheet. Download your transactions and you'll find **Buyer Lead Source** in column Q and **Seller Lead Source** in column S — pivot on either and you have your breakdown.

Take your transactions out of Pipeline as a spreadsheet — search and sort first, and download exactly the list you shaped.

See Transaction Spreadsheet Downloads

5. Narrow It to One Agent

There's no lead source report filtered by agent. The way around it takes one extra step: search the agent's transactions first, then download those results — the spreadsheet you get covers only their deals, lead source columns included.

Reach any transaction in your account from one box in the upper-left corner — type a name to look across every field at once, or pick a single field and search inside just that.

See Global Search