Lead Sources Report

Last Modified on 09/04/2026 11:17 am EDT

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

Introduction

You're paying for portal leads, a referral network, and a sign rider, and sooner or later somebody has to say which of those paid for itself. The deals are all in Pipeline. The comparison isn't, unless someone sits down and builds it.

The Lead Sources report builds it for you. Run it and your closed business comes back broken out by where each deal came from, with closings, commission, and sales volume beside every source. Two things share the name, so it's worth separating them before you go looking: the lead source is a field on the transaction where you record how a deal reached you, and this report is what totals your closed business by that field.

Which means the answer is only as good as the field. A deal with the lead source left blank is business you can't attribute to anything, so filling it in at intake is the small habit that makes the report worth running at all. Do it consistently and you can hold one year up against the last and see what actually changed, instead of arguing from impressions.

How It Works

The report reads closed transactions where you've entered commissions, then groups them by the lead source recorded on each.

Where to Find It

It's on the **Reports** page, listed as **Lead Sources** in the **Financials** section of the left menu.

It Comes With the Commission Module

The Lead Sources report is part of the add-on. Without it, you can still filter by lead source in Global Search and download a transaction spreadsheet that carries the lead source columns.

What It Reports

Number of closed transactions, commission, and sales volume generated by each lead source.

What You Can Filter On

Choose a **Location** and a **Closing Period**, then narrow further with **Status**, **Side**, and **Label** if you want.

The Field Has to Be Filled In

The report can only group what's on the transaction. A deal with no lead source entered has nothing to group under.

Download a Lead Sources Report

> Break your closed business out by where the lead came from, with closings, commission, and sales volume for each.

> **Who Can Do This**: Master admins, plus admins granted the View Financial Reports permission for the location. Company-wide figures need that permission in every location, including inactive ones.

To download a Lead Sources report:

1. Click [Reports] from the top menu.
2. Click [Lead Sources] from the **Financials** section of the left menu.
3. If your company has more than one location, select your**Location** from the dropdown. Company-wide is the default.
4. Choose your **Closing Period**. Last Month is the default.
5. Optionally, narrow the report with the **Status**, **Side**, and **Label** filters.
6. Click [Download Report].

The file downloads to your computer. Open it in your spreadsheet app and sort by any column to rank your lead sources on that stat.

Where the Lead Source Itself Is Set

This report only reflects what's on your transactions, so the field and its options are worth a look if the report comes back thin.

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

See Lead Sources

Lead Sources Report FAQ

The Lead Sources report ranks your closed business by where the lead came from. Answers to the common questions about access, empty reports, and reporting on lead sources without the module.

See Lead Sources Report FAQ

Lead Sources Report Troubleshooting

Report empty or short? Start here.

- Why Is My Commission Report Blank or Missing Transactions?