REFERENCE GUIDE

Attribution

Track where every lead comes from

Reporting Menu and Date Range

What It Is

Search for Reports to find your tracking reports. Each report has a date range picker that controls which days the numbers cover.

How It Works For Your Business

- Search for Reports to see Attribution, Google Ads, Facebook Ads, Call Reporting, Appointment Report, and Agent Reporting.
- Attribution shows where contacts came from, and the ad reports show paid results.
- Call Reporting covers phone activity, Appointment Report covers bookings, and Agent Reporting covers your team.
- Open any report and use the date range picker near the top to choose the days you want.
- If a report is missing, it may be turned off for your account or hidden by user permissions.

Reporting Menu and Date Range – Tips & Guidelines

Tips

- Check the date range first when numbers look low or strange.
- Most reports share the same picker style, so learn it once.
- Ask an admin about permissions if a report is missing.
- Try a short range for now and a long range for the trend.

DO

- Check dates before blaming the data
- Learn each report's purpose
- Compare short and long ranges
- Check user permissions

DON'T

- Assume missing data is broken
- Memorize every menu item
- Read numbers without dates
- Ignore hidden reports

Attribution on a Contact Record

What It Is

Every contact has an attribution section on the Activity tab. It shows First Attribution, the first interaction, and Latest Attribution, the most recent one.

How It Works For Your Business

- Search for Contacts, click a contact, and click the Activity tab.
- Look at the bottom right for the attribution section.
- First Attribution is saved the first time and never changes.
- Latest Attribution updates when the person takes a new action.
- Inside each block, read the session source, page URL, referrer, UTM fields, campaign ID, and click IDs.

Attribution on a Contact Record – Tips & Guidelines

Tips

- Glance at attribution before you call a new lead.
- Read the page URL and referrer together as one sentence.
- Empty fields are normal when a link had no tags.
- An empty referrer often means a direct visit.

DO

- Compare First and Latest
- Read URL and referrer together
- Expect some empty fields
- Say the story as a sentence

DON'T

- Expect First to change
- Panic over empty fields
- Read one field alone
- Skip the Activity tab

Session Source Values

What It Is

The session source is a label for the channel a visit came from. There are nine labels: six for web visitors and three for other origins.

How It Works For Your Business

- Paid Search means a Google Ads campaign, and Paid Social means an ad on a social site.
- Organic Search is a free search result, and Social Media is a non-ad social visit.
- Direct Traffic means no clear source, and Referrals means another site linked to you.
- Others covers calls, texts, emails, and messages, CRM UI means added by hand, and Third Party means a connected tool.
- The UTM source decides paid labels: adwords or a Google click ID is Paid Search, fb_ad is Paid Social.

Session Source Values - Tips & Guidelines

Tips

- Paid labels mean money was spent on the click.
- CRM UI means nobody clicked anything, so do not hunt for an ad.
- Untagged ad links can show up as Direct Traffic.
- Prepare example contacts for each label when you train others.

DO

- Learn all nine labels
- Tag every ad link
- Treat CRM UI as manual
- Note odd labels

DON'T

- Hunt for an ad on CRM UI
- Leave ad links untagged
- Mix up paid and social
- Ignore Direct Traffic spikes

The Attribution Report

What It Is

The Attribution report groups your leads by source on one screen. You pick a date range, read the breakdown, and click a source to see the contacts behind it.

How It Works For Your Business

- Search for Reports, open Attribution.
- Set the date range with the picker near the top.
- Read the source breakdown and find your biggest and smallest sources.
- Click a source row and look for the list of contacts from that source.
- Open a contact to read its attribution section. Your screen may look different, so describe what you see.

The Attribution Report – Tips & Guidelines

Tips

- Last thirty days works well for most people.
- Open the newest few contacts from a busy source.
- A short range shows now and a long range shows the trend.
- Remember the report shows where leads came from, not which became customers.

DO

- Start with thirty days
- Click into top sources
- Open recent contacts
- Watch for Direct Traffic

DON'T

- Ignore the date range
- Open every contact
- Treat it as a sales report
- Skip the drill down

Facebook Ads UTM Tracking

What It Is

Adding UTM tags to your Facebook ads makes new contacts arrive with source, campaign, and ad details filled in. You add them in the ad's tracking settings.

How It Works For Your Business

- In Facebook Ads Manager, open the ad, click Edit, and find the Tracking area.
- Use Build a URL parameter to add the tags.
- Set source to fb_ad, medium to {{adset.name}}, campaign to {{campaign.name}}, and content to {{ad.name}}.
- Add a custom parameter named campaign_id with the value {{campaign.id}}.
- Test with a new contact and check that the UTM values appear in its attribution.

Facebook Ads UTM Tracking – Tips & Guidelines

Tips

- The fb_ad source is what produces the Paid Social label.
- The curly brace values fill in automatically for each ad.
- Test every new ad with a real click.
- Facebook's menus change, so look for the closest named option.

DO

- Use fb_ad as the source
- Copy the values exactly
- Test with a new contact
- Tag every ad

DON'T

- Type your own source name
- Skip the campaign_id
- Assume tags work untested
- Leave ads untagged

Google Ads Tracking Template

What It Is

A tracking template in Google Ads adds UTM tags and click details to every ad link in your account. It lets your software label the lead as Paid Search.

How It Works For Your Business

- In Google Ads, open Account Settings and find Tracking.
- Paste the tracking template that includes utm_source=adwords.
- The template also carries keyword, match type, and gclid values.
- Submit a test lead and read the resulting attribution fields on the contact.
- Do not rename campaigns while they are running.

Google Ads Tracking Template - Tips & Guidelines

Tips

- utm_source=adwords is what produces the Paid Search label.
- The gclid is the Google click ID that helps match a click to a lead.
- Renaming a campaign mid-flight can split your reporting.
- Use the setup help article for the exact template text.

DO

- Set it at the account level
- Paste the template exactly
- Run a test lead
- Keep campaign names stable

DON'T

- Edit the adwords source
- Rename live campaigns
- Skip the test lead
- Guess the template text

Google and Facebook Ads Reports

What It Is

The Google Ads and Facebook Ads reports show how paid campaigns perform. You can break results down by campaign, ad group, and ad, and add spend to see cost.

How It Works For Your Business

- Search for Reports, then pick Google Ads or Facebook Ads.
- Choose a date range at the top.
- View results by campaign, ad group, and ad, with leads and sales columns.
- Add client spend to the report so cost per lead can show.
- Use the terminology help article to decode column names.

Google and Facebook Ads Reports - Tips & Guidelines

Tips

- Match the date range to the ad platform's dates.
- Spend must be added by you before cost shows.
- Compare ads side by side with the same dates.
- Use consistent campaign names so rows stay clean.

DO

- Pick matching dates
- Add spend
- Compare ads fairly
- Read column help

DON'T

- Compare mismatched dates
- Expect cost without spend
- Rename campaigns midstream
- Ignore column names

Call and Appointment Reports

What It Is

Call Reporting shows your phone activity and Appointment Report shows your bookings. Both use widgets and charts that you can filter by date.

How It Works For Your Business

- Call Reporting has Incoming and Outgoing tabs and a phone number filter.
- It includes a status donut, a first-time calls widget, and Top Call Sources.
- The call history table supports recordings and a CSV export with a column picker.
- Appointment Report shows status counters and source and channel donuts, including Event Sync.
- It also shows top calendars, top users, popular days, and most-cancelled and most-rescheduled calendars.

Call and Appointment Reports - Tips & Guidelines

Tips

- Filter by phone number when you run several lines.
- Use the column picker to export only what you need.
- Popular days show when bookings cluster.
- Source donuts tie bookings back to where they came from.

DO

- Filter by number
- Pick export columns
- Review top sources
- Check cancelled calendars

DON'T

- Export every column
- Skip date ranges
- Ignore status counters
- Forget recordings exist

Agent Reports, GA4 and Troubleshooting

What It Is

Agent Reporting shows team activity and a leaderboard. Google Analytics 4 can record page views, and a checklist helps you fix missing attribution.

How It Works For Your Business

- Agent Reporting has an opportunities view with conversion, SMS, email, call, and efficiency stats.
- The leaderboard ranks your team, and you can compare date ranges.
- For GA4, search for Funnels, open Settings, then Tracking Code, and paste the GA4 tag.
- A workflow action can also send events to Google Analytics.
- If attribution is missing, check the Google tracking script, campaign name uniqueness, timezone mismatches, and user permissions.

Agent Reports, GA4 and Troubleshooting - Tips & Guidelines

Tips

- Compare two date ranges to see change over time.
- Verify page views in GA4 after pasting the tag.
- Unique campaign names prevent mixed data.
- A timezone mismatch can shift counts between days.

DO

- Compare date ranges
- Verify the GA4 tag
- Use unique campaign names
- Check permissions

DON'T

- Paste the tag untested
- Reuse campaign names
- Ignore timezones
- Assume zero means broken

Key Terms Glossary

Attribution

A record of where each lead came from.

Session source

A label naming the channel a visit came from.

First Attribution

A contact's first interaction. It never changes.

Latest Attribution

A contact's most recent interaction. It updates.

UTM

A tag on a link that carries campaign details.

Referrer

The site a person was on just before yours.

Click ID

A code an ad platform adds to match a click to a lead.

Direct Traffic

A visit with no clear source.

Organic Search

A visit from a free search result.

Tracking template

Account-level text that adds tags to every ad link.

Date range

The window of days a report counts.

Leaderboard

A ranking of your team by activity.

Getting Help

Your software changes over time, so a menu name or report layout may look different from what you see here. If something does not match, check the in-app help for Reporting and Attribution, or look for the option with the closest name.