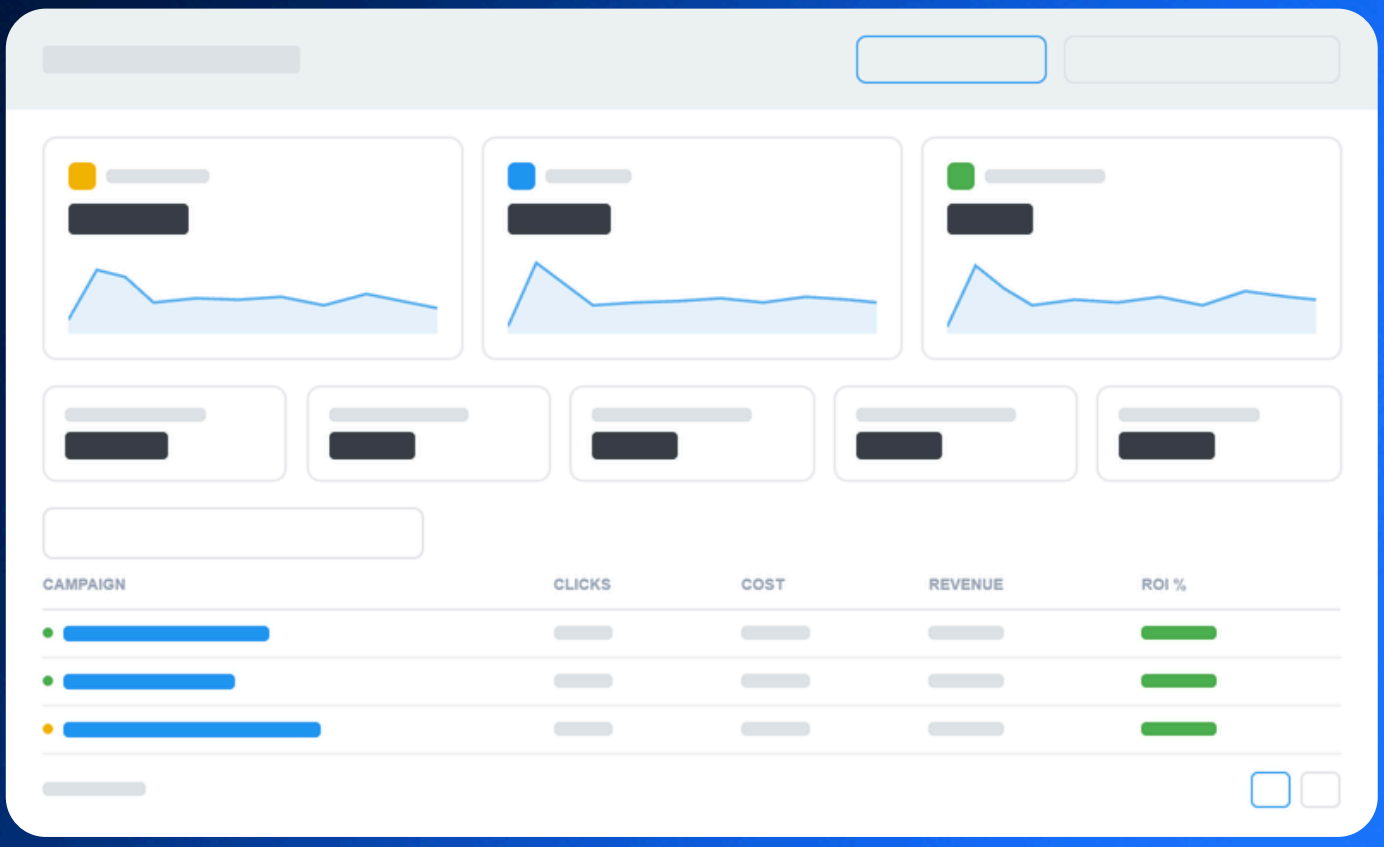
REFERENCE GUIDE

Reporting

Every report, in one guide



Reporting Overview and Navigation

What It Is

Search for Reports to find built-in reports for ads, where leads came from, calls, appointments, and teammates, plus a builder for your own reports.

How It Works For Your Business

- Search for Reports, Dashboard, or Custom reports by name.
- Google Ads and Facebook Ads show paid ad results next to leads and sales.
- Attribution shows where a lead first came from.
- Call Reporting, Appointment Report, and Agent Reporting cover phones, bookings, and your team.
- Custom reports is where you build branded reports. Dashboard feeds them.

Reporting Overview and Navigation - Tips & Guidelines

Tips

- If a sub-item is missing, check your plan and user permissions first.
- Click each sub-item once to learn the map before diving deep.
- Look for the date range picker near the top of most reports.
- Sub-item names can differ a little, so look for the closest match.

DO

- Open each sub-item once
- Check plan and permissions
- Start with one question
- Use the same date range

DON'T

- Memorize every page
- Assume a missing tab is broken
- Open six tools to compare
- Guess without checking

Date Ranges and Compare

What It Is

The date range picker sets which dates a report covers. The compare option shows the report next to an earlier time frame so you can see if numbers went up or down.

How It Works For Your Business

- Click the date range picker near the top of the report.
- Choose a preset like last 7 days or last month. Presets move forward with the calendar.
- Choose the custom option to set an exact start date and end date.
- Apply the range and watch the numbers refresh.
- Look for the compare option, turn it on, and pick an earlier period.

Date Ranges and Compare – Tips & Guidelines

Tips

- Check that two pages share one date range before you compare them.
- Use custom ranges for a specific campaign or a month-end check.
- Compare this month with last month for the most common view.
- With few days of data, compare the same number of days to stay fair.

DO

- Use presets for speed
- Use custom for exact dates
- Match ranges across pages
- Turn on compare

DON'T

- Compare mismatched ranges
- Read a number without a range
- Forget which range is on
- Trust one day of data

Filters, Timezone and Permissions

What It Is

Filters narrow a report to one phone number, calendar, or user. Timezone and user permissions can also change the totals a person sees.

How It Works For Your Business

- In Call Reporting, use the phone number filter to see all numbers or just one.
- In the Appointment Report, use the calendar filter to narrow bookings to one calendar.
- Use the user filter in the Appointment Report to see one teammate.
- A call late at night can fall on a different day depending on the timezone setting.
- A user limited to their own items sees smaller totals than an admin does.

Filters, Timezone and Permissions – Tips & Guidelines

Tips

- When numbers differ, ask: same date range, same filters, same timezone, same permissions?
- Use one filter to answer one small question at a time.
- Clear your filters when you finish so others are not confused.
- Confirm the timezone setting on screen in your account settings.

DO

- Answer one question per filter
- Clear filters after use
- Check timezone settings
- Review user permissions

DON'T

- Stack filters and forget them
- Blame the software first
- Ignore timezone shifts
- Compare admin and user views

Ad and Attribution Reports

What It Is

The Google Ads and Facebook Ads reports line up ad spend with leads and sales. The Attribution report shows where a lead first came from.

How It Works For Your Business

- Search for Reports, then pick Google Ads or Facebook Ads. Your ad account must be connected.
- Rows are organized in levels: campaign, ad group, and ad.
- Start at campaign for the big picture, then drill into ad group or ad.
- Leads are open opportunities. Sales are opportunities marked as won. Spend is what you paid.
- Cost columns like cost per lead are spend divided by a result, so you can compare fairly.

Ad and Attribution Reports - Tips & Guidelines

Tips

- Read a row left to right like a sentence: spent, leads, sales.
- Sales look empty if nobody marks opportunities as won.
- Use the same date range on Google Ads and Facebook Ads to compare them.
- Column labels may vary, so confirm them on screen.

DO

- Start at campaign level
- Set the date range first
- Keep opportunities updated
- Compare both ad tabs

DON'T

- Judge by clicks alone
- Skip the sales column
- Zoom in too early
- Ignore the spend column

Call Reporting

What It Is

Call Reporting tracks your phone activity by phone number. It splits calls into Incoming and Outgoing and shows status, sources, and a call table.

How It Works For Your Business

- Search for Call Reporting and set a date range.
- Switch between the Incoming and Outgoing tabs. The charts and table follow your tab.
- Use the phone number filter to see all numbers or one number.
- The status donut splits incoming calls into answered, missed, and busy.
- Top Call Sources lists where calls come from with total calls, deals won, and call length.

Call Reporting - Tips & Guidelines

Tips

- Call Reporting may need a higher plan level, so confirm it appears.
- A big missed slice points to a pickup problem.
- Some calls show more than one recording in a small dropdown.
- Compare calls with deals won, not calls alone.

DO

- Start on Incoming
- Check the missed slice
- Filter by phone number
- Note deals won by source

DON'T

- Ignore missed calls
- Judge by call count alone
- Mix incoming and outgoing
- Skip the status chart

Call Table and CSV Export

What It Is

The call table lists your calls. A CSV export saves them as a plain file you can open in Excel or Google Sheets.

How It Works For Your Business

- Scroll to the call table below the charts.
- Open a call with several recordings from the small dropdown on its row.
- Find the export option and choose CSV.
- Pick which columns to include so you only export what you need.
- Open the file in Excel or Google Sheets to sort and share it.

Call Table and CSV Export - Tips & Guidelines

Tips

- Filter first, then export so the file matches the screen.
- Confirm the export button's exact label on screen.
- Name the file with the date range you used.
- Keep an export each month for easy checks.

DO

- Filter before exporting
- Choose useful columns
- Name files by date range
- Open the file to check it

DON'T

- Export everything blindly
- Skip column choices
- Share without a quick look
- Forget the date range

Appointment and Agent Reports

What It Is

The Appointment Report shows bookings by status, source, and calendar. Agent Reporting shows stats per teammate and a leaderboard.

How It Works For Your Business

- Search for Appointment Report. Status counters show booked, confirmed, and cancelled.
- The source donut shows where appointments came from. Top calendars shows which get booked most.
- Use the calendar and user filters to zoom in on one calendar or person.
- Search for Agent Reporting for opportunities, won deals, and calls, texts, and emails per user.
- The Leaderboard ranks your team by most opportunities and most won opportunities.

Appointment and Agent Reports – Tips & Guidelines

Tips

- Agent Reporting may need a higher plan level and permissions can limit what users see.
- Read a whole row before judging a person.
- Change the date range and the leaderboard moves.
- Use compare to see this month next to last month.

DO

- Read the full row
- Use calendar and user filters
- Try the leaderboard
- Compare two periods

DON'T

- Judge on one number
- Shame anyone with it
- Skip cancellations
- Forget the date range

Building Custom Reports

What It Is

A Custom Report is a polished, multi-page, branded document built from dashboard widgets. You can start from scratch, from a dashboard, or from the template library.

How It Works For Your Business

- Search for Custom reports and click New Report.
- Choose Start from scratch, From existing dashboard, or From Template Library.
- From a dashboard, pick the dashboard and the pages generate for you. You can edit a widget's own date range.
- From the template library, filter by niche and tags, preview, and choose Use Template.
- Use the page list to reorder or rename pages and apply a theme. Add logo and headers on the cover.

Building Custom Reports - Tips & Guidelines

Tips

- Dashboard widgets feed your reports, so build good widgets first.
- Search for Dashboard, use Edit dashboard and Add Widget to pick categories like opportunities, calls, and appointments.
- Set a widget's own date range and filters when you need one.
- Click Save often while you build.

DO

- Start from a template
- Rename each page
- Add your logo
- Save while you build

DON'T

- Build from scratch every time
- Leave pages unnamed
- Forget widget dates
- Skip the preview

Scheduling, Sending and PDF

What It Is

A saved Custom Report can be emailed on a schedule, sent once, or downloaded as a PDF. Recipients do not need a login.

How It Works For Your Business

- Save the report, then use the Schedule option and choose how often: daily, weekly, or custom.
- Set the send time and the date range. You can keep each widget's own dates.
- Turn on the compare option to show an earlier period.
- Fill in the sender email, subject, message, and recipient list. Then save the schedule.
- Use Send for a one-off email or Download for a PDF.

Scheduling, Sending and PDF - Tips & Guidelines

Tips

- Tables in a PDF are limited to 100 rows, so keep long tables short.
- A PDF has no drill-down, so show the totals you want.
- Preview your report before the first send.
- Confirm the exact button names on screen, since they can change.

DO

- Preview before sending
- Write a clear subject
- Check the recipient list
- Keep tables short

DON'T

- Send without checking
- Expect drill-down in PDFs
- Forget the send time
- Email unknown recipients

Key Terms Glossary

Reporting

The area that holds your built-in reports (search for Reports).

Date range picker

The control that sets which dates a report covers.

Preset

A quick date choice like last 7 days.

Compare

Shows a report next to an earlier time frame.

Filter

A control that narrows a report to one item.

Attribution

The report that shows where a lead first came from.

Campaign

The big goal of your ads that holds ad groups.

Lead

An open opportunity from a form, chat, or call.

Sale

An opportunity you marked as won.

Donut chart

A round chart that splits a total into slices.

CSV

A plain file of rows and columns for a spreadsheet.

Widget

A small dashboard box showing one number or chart.

Getting Help

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