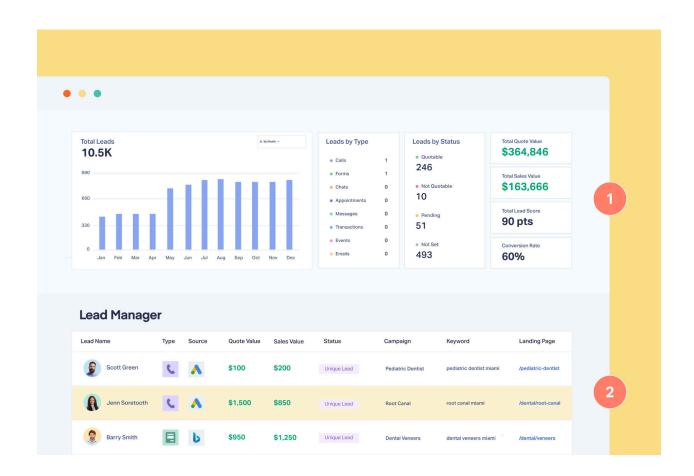


#### **HOW-TO GUIDE**

## **Access Lead Data**

1

### **Exploring Data in the Lead Manager**



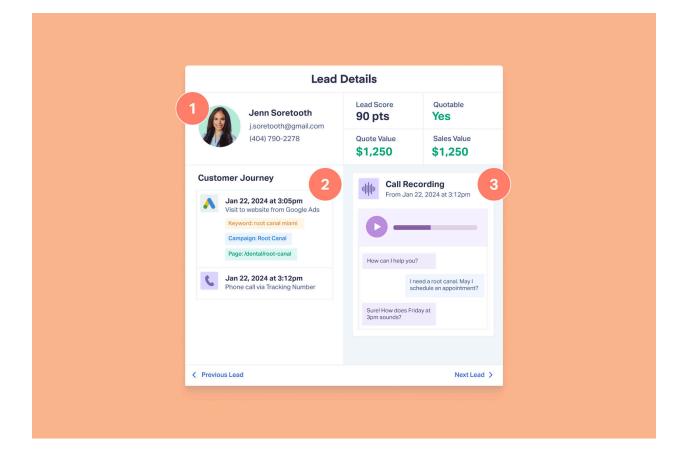
The Lead Manager is your lead tracking command center. Here you can find:

- 1. An overview of all your lead data in a time period
- 2. 70+ data points for individual leads you've captured



2

### **Exploring Data in the Lead Details Page**



Click the **View Lead** button next to a lead to access the **Lead Details Page**. Here you can find data on:

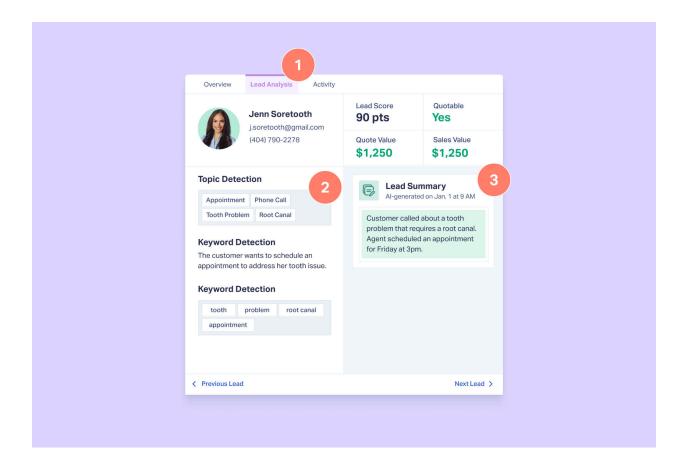
- 1. Who the lead is (name, email address, etc.)
- 2. Where they came from with attribution data like source, medium, campaign, keyword, etc.
- **3. What they are interested in** using conversion action data like call recording, transcript, form fields, etc.



# 3

### **Using the Lead Details Page – Lead Analysis**

Al-powered lead analysis helps you quickly understand **lead intent** and **potential value** from call recordings and form submissions.



- 1. Use the **Lead Analysis** tab to speed up lead enrichment with Al
- 2. Explore **Topics, Intent, and Keywords** detected from calls
- 3. Lead Summary provides a 3-5 sentence summary for a call