

HOW-TO GUIDE

Access Lead Data

1 Exploring Data in the Lead Manager

The screenshot displays the Lead Manager dashboard. At the top left, a bar chart titled 'Total Leads' shows 10.5K leads over a 12-month period. To the right, summary statistics include: Total Leads (10.5K), Leads by Type (Calls: 1, Forms: 1, Chats: 0, Appointments: 0, Messages: 0, Transactions: 0, Events: 0, Emails: 0), Leads by Status (Quotable: 246, Not Quotable: 10, Pending: 51, Not Set: 493), Total Quote Value (\$364,846), Total Sales Value (\$163,666), Total Lead Score (90 pts), and Conversion Rate (60%). Below this is the 'Lead Manager' table with three lead entries.

Lead Name	Type	Source	Quote Value	Sales Value	Status	Campaign	Keyword	Landing Page
Scott Green	Phone	Google	\$100	\$200	Unique Lead	Pediatric Dentist	pediatric dentist miami	/pediatric-dentist
Jenn Soretooth	Phone	Google	\$1,500	\$850	Unique Lead	Root Canal	root canal miami	/dental/root-canal
Barry Smith	Form	Twitter	\$950	\$1,250	Unique Lead	Dental Veneers	dental veneers miami	/dental/veneers

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

Lead Details

1 Jenn Soretooth
j.soretooth@gmail.com
(404) 790-2278

Lead Score 90 pts	Quotable Yes
Quote Value \$1,250	Sales Value \$1,250

2 Customer Journey

- Jan 22, 2024 at 3:05pm**
Visit to website from Google Ads
Keyword: root canal miami
Campaign: Root Canal
Page: /dental/root-canal
- Jan 22, 2024 at 3:12pm**
Phone call via Tracking Number

3 Call Recording
From Jan 22, 2024 at 3:12pm

How can I help you?
I need a root canal. May I schedule an appointment?
Sure! How does Friday at 3pm sounds?

< Previous Lead Next Lead >

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

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

The screenshot displays the 'Lead Analysis' tab for a lead named Jenn Soretooth. The interface is divided into several sections:

- Lead Profile:** Includes a profile picture, name 'Jenn Soretooth', email 'j.soretooth@gmail.com', and phone number '(404) 790-2278'. A red circle '1' highlights the 'Lead Analysis' tab.
- Lead Metrics:** A table showing 'Lead Score 90 pts', 'Quotable Yes', 'Quote Value \$1,250', and 'Sales Value \$1,250'.
- Topic Detection:** A section with buttons for 'Appointment', 'Phone Call', 'Tooth Problem', and 'Root Canal'. A red circle '2' highlights this section.
- Keyword Detection:** Two sections. The first states 'The customer wants to schedule an appointment to address her tooth issue.' The second shows detected keywords: 'tooth', 'problem', 'root canal', and 'appointment'.
- Lead Summary:** A section titled 'Lead Summary' with a sub-header 'AI-generated on Jan, 1 at 9 AM'. The summary text reads: 'Customer called about a tooth problem that requires a root canal. Agent scheduled an appointment for Friday at 3pm.' A red circle '3' highlights this section.

Navigation links for '< Previous Lead' and 'Next Lead >' are visible at the bottom.

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