Branding Revenue by Lead Source

04/30/2025 4:55 pm CDT

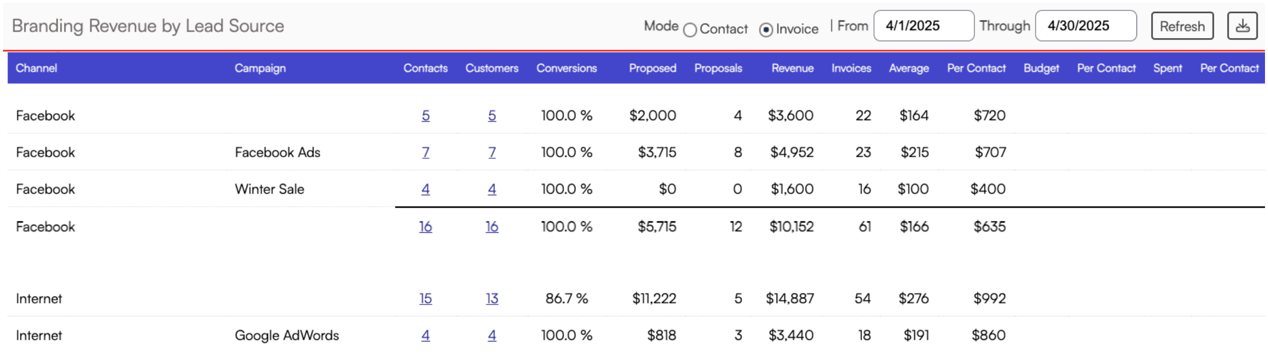
Overview

The **Branding Revenue by Lead Source** report helps you measure the effectiveness of your marketing efforts by tracking revenue, proposals, and lead conversion by campaign and channel. Whether you're running campaigns across multiple locations or testing different versions of an ad, this report gives you a clear view of ROI.

This report summarizes revenue and engagement by campaign. It's grouped by **Channel** (the source, like Facebook or Google Ads) with rows for each **Campaign** (specific efforts like “Spring Sale A” or “Winter Promo”), followed by a summary line for each channel.

Use it to:

- Measure revenue from specific campaigns
- Track conversion rates
- Compare results across locations
- Fine-tune campaign strategies

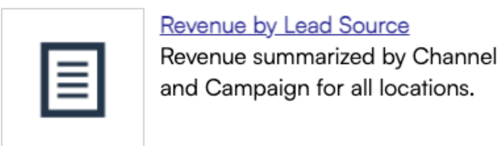

Branding Revenue by Lead Source
Mode Contact Invoice | From 4/1/2025 Through 4/30/2025 Refresh

Channel	Campaign	Contacts	Customers	Conversions	Proposed	Proposals	Revenue	Invoices	Average	Per Contact	Budget	Per Contact	Spent	Per Contact
Facebook		5	5	100.0 %	$2,000	4	$3,600	22	$164	$720				
Facebook	Facebook Ads	7	7	100.0 %	$3,715	8	$4,952	23	$215	$707				
Facebook	Winter Sale	4	4	100.0 %	$0	0	$1,600	16	$100	$400				
Facebook		16	16	100.0 %	$5,715	12	$10,152	61	$166	$635				
Internet		15	13	86.7 %	$11,222	5	$14,887	54	$276	$992				
Internet	Google AdWords	4	4	100.0 %	$818	3	$3,440	18	$191	$860				

Settings and Navigation

To access the report, go to **Dashboard** > **Reports** tab:

Then select **Branding Revenue by Lead Source**



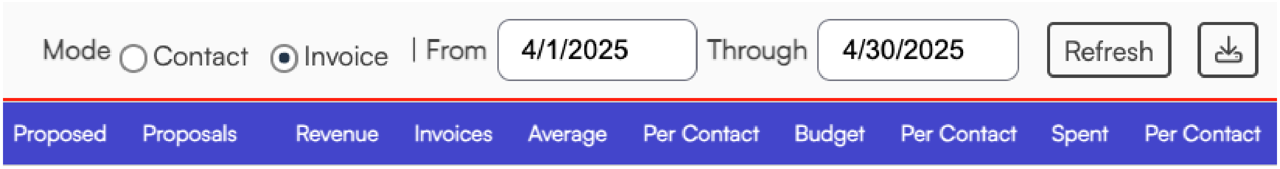
Report Modes

Use the toggle at the top of the report to choose between:

- **Contact Mode** – filters by the date the contact was entered into the system
- **Invoice Mode** – filters by the date the invoice was created

How they differ:

- In **Contact Mode**, revenue is attributed to contacts created in the selected date range—even if their invoices happen later.
- In **Invoice Mode**, only invoices created within the date range are included.



Tip: Don't forget to click **Refresh** after switching modes.

Column Descriptions

Column	Description
Channel	Main lead source (e.g., Google Ads)
Campaign	Specific effort within a channel (e.g., "Spring A")
Contacts	Number of leads tied to the campaign (clickable to view)
Customers	Number of leads converted to customers (clickable to view)
Conversion	% of leads that became customers
Proposed	Total value of proposals created
Proposals	Number of proposals tied to the campaign
Revenue	Total from **approved invoices** (completed work)
Invoices	Number of invoices created
Average	Average invoice amount
Per Contact	Revenue per contact
Budget	Entered campaign budget (manual input)
Per Contact	Budget per contact
Spent	Total spend entered for campaign
Per Contact	Spend per contact

Note: If "Budget" is $0, the campaign still shows if a budget was manually entered—even if no leads came in.
[Read about Campaign Budgeting >>]

Drilling Down

The values in the **Contacts** and **Customers** columns are clickable and take you to detailed contact grids for more insights.

At the **bottom of the report**, you'll find two downloadable .CSV files:

- **Proposal details**: Includes contact names, emails, proposal totals, and statuses
- **Invoice details**: Shows customer names, invoice amounts, and approval status

Total	260	256	98.5 %

Proposal details... | Invoice details...

Interpreting the Report

- **Revenue** is only counted from **approved invoices**, giving you a true picture of completed work.
- Campaign and channel data help you A/B test different versions, optimize spend, and make better marketing decisions.
- All campaign and channel names are user-created—you can define and adjust them to suit your needs.

FAQs

Q: How do I switch between Contact and Invoice Mode?
Use the radio buttons at the top of the report to choose. Remember to click **Refresh** afterward.

Q: Can I download this report?
Yes. After applying your filters, click the **Download** button near the Refresh button to export the data.

Q: Why do some campaigns show $0 in the budget or spend columns?
Budget data must be manually entered by the user or franchisee. A campaign can still show up if a budget was entered but no leads were generated.

Q: What defines a "Customer"?
A contact becomes a customer by default when they have an invoice. However, your organization may override this with specific settings.

Q: Where can I find proposal and invoice details?
Scroll to the bottom of the report for downloadable CSVs containing detailed records.

Q: I'm not seeing expected results—what should I do?
Check your date range and selected mode. If issues persist, reach out to Support for assistance.