

# Contact Reporting

08/19/2025 3:49 pm CDT

## Overview

There are many possible reporting and tracking capabilities for the contacts within your serviceminder account. There are brand-level reports and there are organizational-level reports. For this article, we will focus on org-level reporting, which is from the franchisee perspective.

In other words, these reports will only pull data from the location you are logged into.

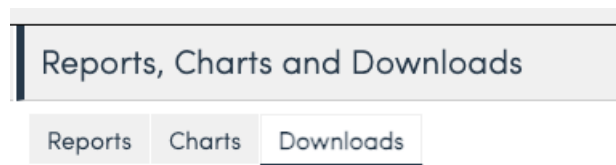
This article will review:

- [Settings and Navigation](#)
- [Contact Details Report](#)
- [Referral Report](#)
- [Charts](#)
- [Downloads](#)
- [Other Contact Reporting Terms](#)
- [FAQs](#)

## Settings and Navigation

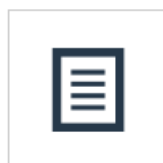
Go to the top, blue menu bar and click on **Reports**. You will see three tabs.

- Reports shows all possible org-level reporting.
- Charts provide visual data.
- Downloads allows for massive data pulls for your location.



## Contact Details Report

There is one default report built into serviceminder that is Contact-specific.



☆ [Contact Details](#)

Includes all contacts in your organization.

You can filter this list by date range, Contact Owner, categories, tags, and more.

If you add filters or change the date range, don't forget to refresh to have the page update and reload. Look for the button with the two, rotating arrows.

You can also download the Contact Details list.

Contact Details												
						From	10/13/2023	Through	1/11/2024	Filter		
Name	Service Address	Billing Address	Channel	Campaign	GeoZones	Email	Phone	Category	Business Type	Monster Type	Paranormal Type	Tags
<a href="#">Fred the Gardener</a>	815 Cunningham Ln   Saint Albans, WV 25177		Existing				(000) 000-0000	Customer				Delayed Proposal Acceptance, Cancelled Customer, Blue
<a href="#">Molly Baker</a>	2308 Cleveland Ave   Saint Albans, WV 25177		Internet			<a href="mailto:heatherng@serviceminder.com">heatherng@serviceminder.com</a>	(000) 000-0000	Customer				New Customer, Blue
<a href="#">Kendall the Gaffer</a>	99 Fairway Dr   Charleston, WV 25309		Existing				(000) 000-0000	Customer				New Customer
3 in total												

## Referral Report

A referral indicates how a contact was obtained. Referrals can be considered verbal recommendations.

Channels/Campaigns

Channels...

Budgeting...

Direct Mail Internet **Referral** Other Channels Add new Channel...

Action	Name	External Description	Active	Start Date	End Date	Marketing Program	Provider
<a href="#">Edit</a>   <a href="#">Delete</a>	<a href="#">Architects</a>	Architect	Yes				
<a href="#">Edit</a>   <a href="#">Delete</a>	<a href="#">Existing Customer</a>	Existing Customer	Yes				
<a href="#">Edit</a>   <a href="#">Delete</a>	<a href="#">Landscapers</a>	Landscaper	Yes				

[Add a campaign...](#) | [Import Channel...](#)

Campaign | Existing Customer

Edit

Delete

Channel **Referral**

Campaign/Partner Existing Customer

Active? Yes

External Description Existing Customer

Tracking Parameters &channel=5&campaign=288

Created 8/28/2013 3:56:01 PM

Updated 8/28/2013 3:56:01 PM

Re-mapping Move contacts on this campaign to a new ...

--Channel--

--Campaign/Partner--

Move!

Contacts

Map

Page 1 of 5 (50 items)

Email	Service Address	City	Zip	Category	Channel	Last Service Date
Chris.Jackson@	2612 Deep Valley Trail	Plano	75023	Customer	Referral	4/29/2013 8:11:04 AM
Tom.Allen@ke	1119 Shadetree Ln.	Allen	75013-5406	Prospect	Referral	10/17/2016 9:32:05 PM
David.Castagn	6633 Manitowoc Dr	Plano	75023	Prospect	Referral	3/24/2013 5:04:28 PM
Colm.Bergin@k	16101 Amberwood Rd	Dallas	75248	Customer	Referral	3/7/2016 8:00:00 AM
Joff.Farris@k	607 DeForest Court	Coppell	75019	Customer	Referral	5/4/2012 6:16:55 AM
John.Riden@k	2028 Cedarwood Dr	Carrollton	75007	Customer	Referral	12/20/2012 9:35:25 PM
Matt.Pirtle@k	7127 Maple St	Frisco	75034	Customer	Referral	1/9/2012 3:14:35 PM
Cheryl.Jackson@	2612 Deep Valley Trl	Plano	75023	Customer	Referral	11/9/2012 7:42:05 AM
Kent.Teague@k	1505 Ginger Lane	Carrollton	75007	Customer	Referral	3/12/2012 2:23:12 PM
Jim.McCauslan	2209 Crowbridge Dr	Frisco	75034-8380	Customer	Referral	2/29/2015 1:48:16 PM

When you add a contact, you must select a Lead Source / Channel.

☐ Add to Task Board  
☐ Accounting Class  
☐ Lead Source\*  
☐ Referred By

--Select one--  
 Direct Mail  
 Internet  
 Not Radio at All  
 Print  
 ✓ Referral  
 Van

☐ Other  
☐ Pest C  
 --Campaign/Partner--  
 Enter a portion of the name or address

## Charts

By default, each org has two different charts related to Contacts.



[Contacts Created Over Time](#)

This chart displays your contacts created based over time.



[Contact Distribution by City](#)

This chart shows your contacts broken down by city.

- **Contacts Created over Time** - a bar graph showing contacts added to your account for a specific time period
- **Contact Distribution by City** - a bar graph showing where your contacts are located geographically

## Downloads

By default, every org has two downloads that are related to Contacts in their account.



[Contacts](#)

Download contacts in CSV format.



[Contact Notes](#)

Download contact notes with titles in CSV format.

- **Contacts** - Pulls a list of all contacts within the organization and includes information like category and tags. This is a handy download if you are trying to get specific numbers on how many are Leads vs. Customers within a date range.
- **Contact Notes** - Pulls a list showing name, address, tags, date, and all notes made on that Contact Detail's page.

## Other Contact Reporting Terms

On the **Contacts Grid** and on the **Contact Details** page, you can find several fields that some may want clarification on. Here are some of the most asked about:

- **Balance** - This is based on the sum of all invoices with balance due.
- **Lifetime Value** - Based on the sum of all invoices for that Contact, and does not include taxes; that will mean it is different than **Invoice Total**

Lifetime Value \$50,365.00

Balance **\$54,782.50**

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## FAQs

### How do I pull a list of all the prospects from 2023 that did become customers?

Franchisees can pull this report in **Reports > Downloads** tab > **Contacts**. Then sorting based on **Contact Category** and a date range.

For Franchisors (Brand Admins) you can pull this same contacts download (from **Dashboard > Downloads**), which will pull in contacts from EVERY org. Filter using any created after 12/31/2022 through 12/31/2023 and sort the category column to Prospects. So there's a little manual work but you will get the most accurate count.

### Do contacts labeled "Partner/Vendor" count towards the lead count?

Our system counts new leads as new contact entries. They count towards the total contacts in the system so who is "new" relative to a date range. The number listed is a hyperlink that will take you to the contact grid with only those contacts listed. From there you can filter on the category so "partners" are not included. But there is not a way to remove them from the actual Lead Source report.

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