Contact Reporting

08/19/2025 3:49 pm CDT

Overview

There are many possible reporting and tracking capabilities for the contacts within your service**minder** 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.

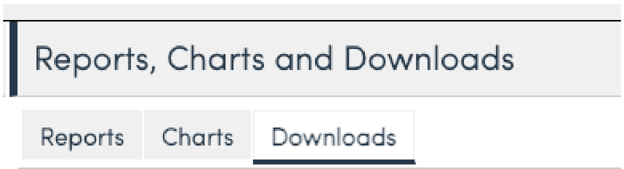
In other words, these reports will only pull data from the location you are logged into.

This article will review:

Settings and Navigation

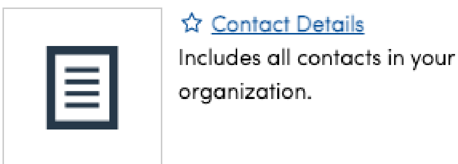
Go to the top, blue menu bar and click on **Reports**. You will see three tabs.

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



Contact Details Report

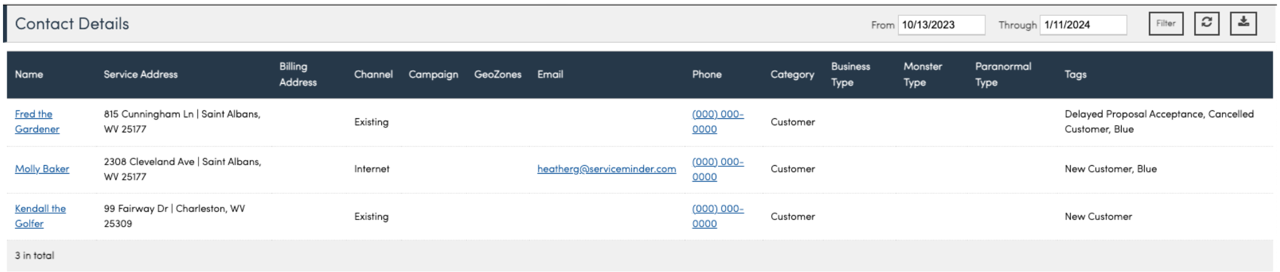
There is one default report built into service**minder** that is Contact-specific.



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

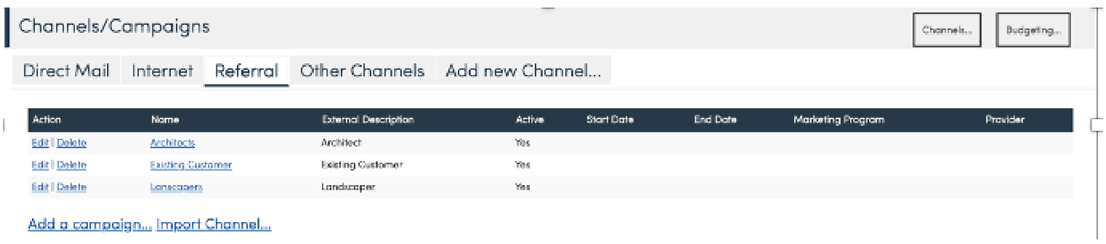
> If you add filters or change the date range, don't forget to refresh to have the page update and reload. Look for the button with the two, rotating arrows.

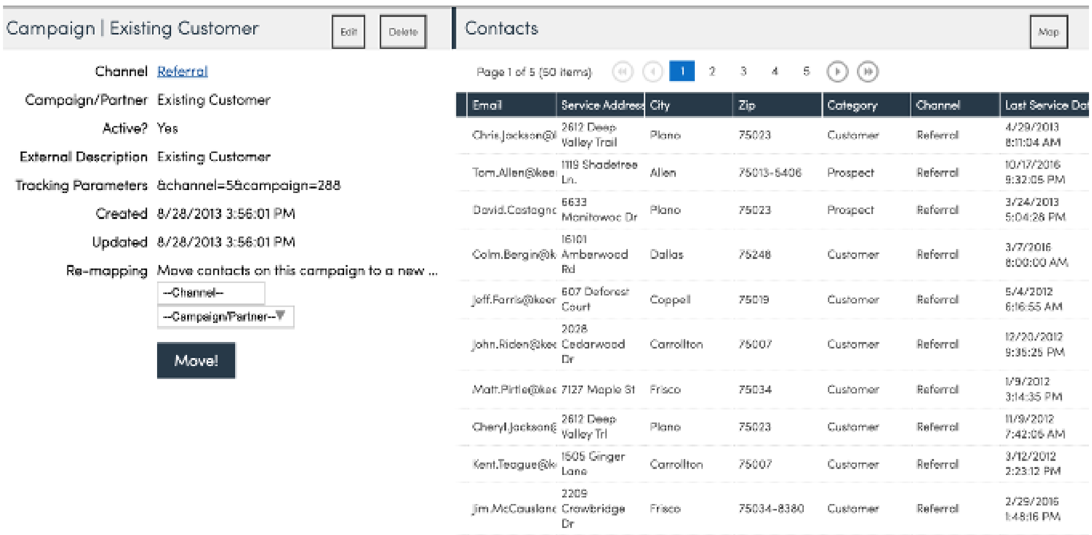
You can also download the Contact Details list.



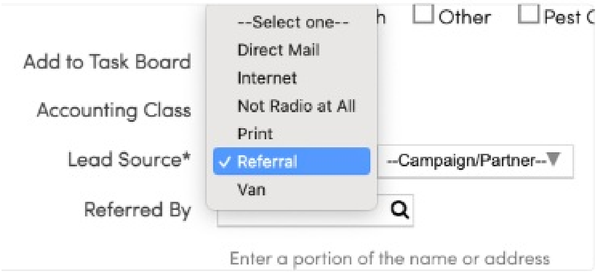
Referral Report

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



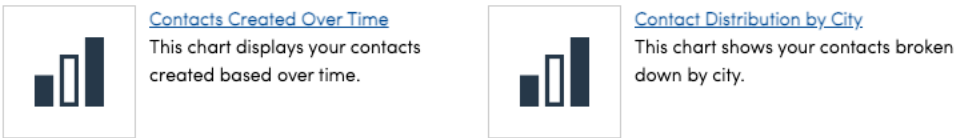


When you add a contact, you must select a Lead Source / Channel.



Charts

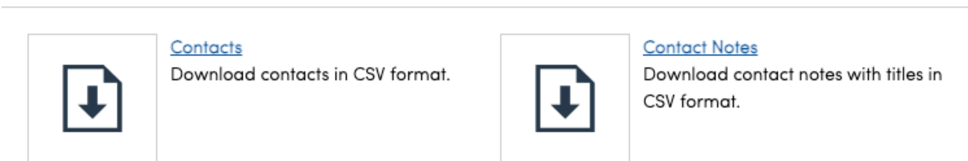
By default, each org has two different charts related to Contacts.



- **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** - 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

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.