

Creating a Report

There are 70+ standard reports covering everything from your lead flow and profits to buyer activity and payments.

Step 1

Click the report tab to start.

Step 2

Select lead type for the report.

Step 3

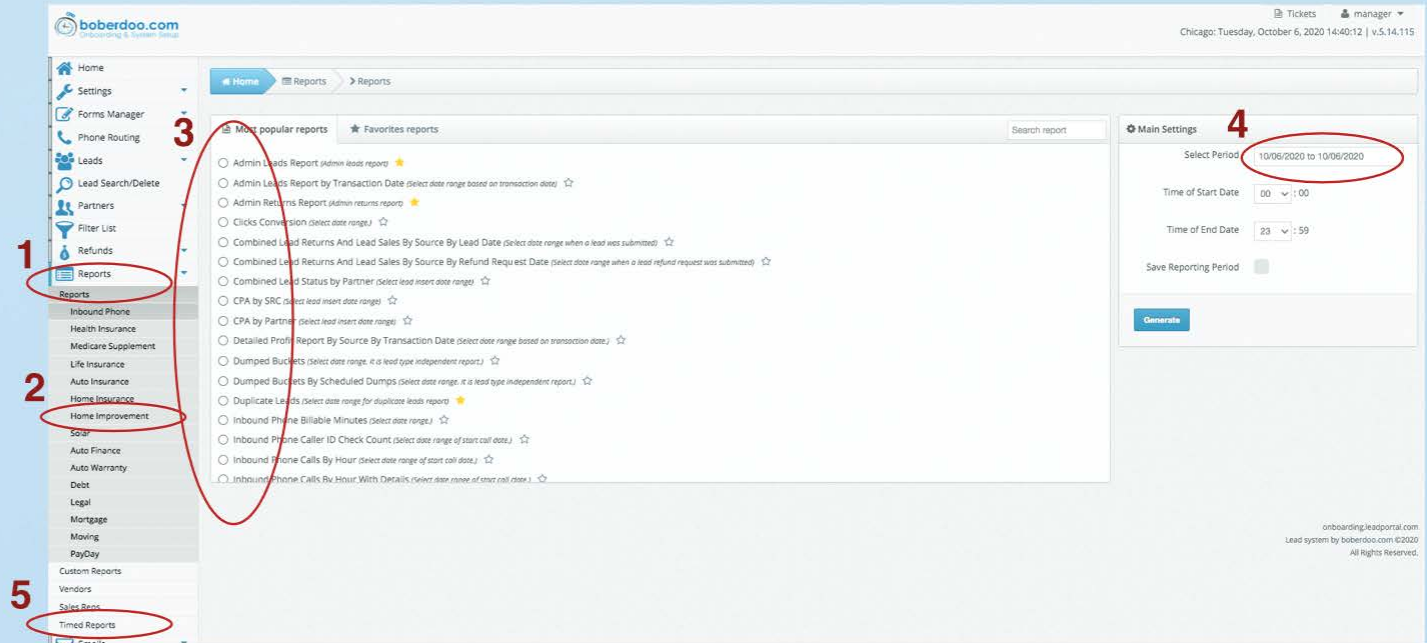
Choose the report you want to run.

Step 4

Select the date range for the report.

Step 5

Timed reports can be set up to automatically send you the report you want daily/weekly/monthly as a secured zip file



The screenshot shows the boberdoo.com interface. The left sidebar contains a menu with items like Home, Settings, Forms Manager, Phone Routing, Leads, Lead Search/Delete, Partners, Filter List, Refunds, Reports (highlighted with a red circle and '1'), Inbound Phone, Health Insurance, Medicare Supplement, Life Insurance, Auto Insurance, Home Insurance, Home Improvement, Solar, Auto Finance, Auto Warranty, Debt, Legal, Mortgage, Moving, PayDay, Custom Reports, Vendors, Sales Bonus, Timed Reports (highlighted with a red circle and '5'), and Emails. The main content area is titled 'Reports' and shows a list of reports under 'Most popular reports' and 'Favorites reports'. A red circle and '2' highlight the 'Reports' tab in the breadcrumb navigation. A red circle and '3' highlight the 'Reports' menu item in the sidebar. A red circle and '4' highlight the 'Main Settings' panel on the right, which includes a 'Select Period' dropdown (highlighted with a red circle) set to '10/06/2020 to 10/06/2020', 'Time of Start Date' (00 : 00), 'Time of End Date' (23 : 59), and a 'Generate' button. The top right corner shows 'Tickets', 'manager', and 'Chicago: Tuesday, October 6, 2020 14:40:12 | v.5.14.115'.

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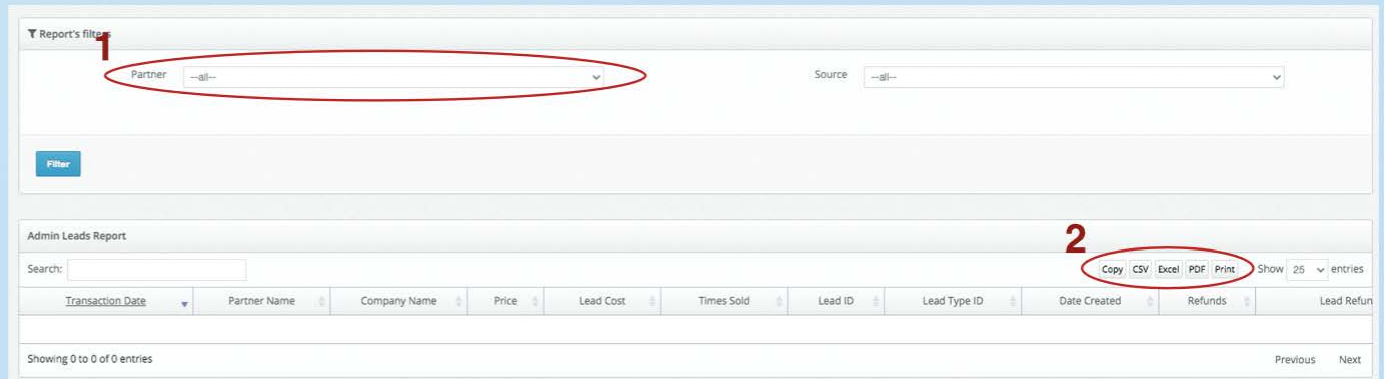
There are 70+ standard reports covering everything from your lead flow and profits to buyer activity and payments.

Step 1

Once you run the report, you can filter by partner or source here.

Step 2

All reports can be exported as any file format.



Report's filters

Partner --all-- Source --all--

Filter

Admin Leads Report

Search:

Copy CSV Excel PDF Print Show 25 entries

Transaction Date	Partner Name	Company Name	Price	Lead Cost	Times Sold	Lead ID	Lead Type ID	Date Created	Refunds	Lead Refun
Showing 0 to 0 of 0 entries										

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