

Recommended KPI-1 and KPI-2 for Clients:

For clients, typically “**Sales**” is used for KPI-1 and “**Appointments**” is used for KPI-2. These are not the required data types but recommended for best results.

Required Columns for Upload:

- Company Name
- Address 1
- Address 2
- City
- State
- Zip
- Sale Date
- Appointment Date

Additional Fields:

- Transaction Amount
- Full Name
- First Name
- Last Name
- Home Phone
- Work Phone
- Cell Phone
- Email Address
- tag_1
- tag_2
- tag_3
- product_code

Tag Usage Examples:

Common Use of Tags for Clients Include:

Product Info: Examples include “Windows”, “Doors”, “Bath”, “Electric”, “Plumbing”, “Deck”, “Patio”

Job/WorkType: Examples include “Installation”, “Repair”

Work Status: “Sold-Completed”, “Demo”, “On Hold”, “Sold- Scheduled”

Why Use Product Tags?

Product tags provide added insight into marketing performance by showing which conversions are tied to specific accounts or loan types once data is uploaded into our system. They can also support deeper analysis, helping us identify monthly trends and refine marketing strategies based on what performed best. Overall, product tags are a valuable tool for connecting sales outcomes to future marketing decisions.