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KPI Data Fields



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General Definitions:

Return(ed) = Order pick up or delivery, i.e. returned to customer

Agent = Source of sale, corresponding to a store, route, or group

Types of KPIs:

Notes/Issues

- **Assigned to** - Employee issue is assigned to
- **Type**
- **Category**
- **Sub Category**
- **Message** - Message Content
- **Created Date**
- **Issue Due Date**
- **Resolved Date**

Help

- **Resolved / Closed** - Is issue resolved?
- **Has Photo**
- **Customer**
- **Customer Agent**
- **Order Agent**
- **Sale ID** - Order Number
- **#Room / #Ref** - Customer Extra Information Field like room number / invoice number
- **Item Brand**
- **Guest Name**
- **Item Type**
- **Payment Setting**
- **Item Fabrics**
- **Item Barcode**
- **Item Colors**

Alterations

- **Alteration Type**
- **Alteration Note**
- **Agent**
- **Sale ID** - Order Number
- **Assigned To**
- **Payment Setting**
- **Alt Created By**
- **Alt Completed By**
- **Sold By** - Employee who detailed item
- **Customer ID**
- **Customer**
- **Piece Count**
- **Before Discount Amount**
- **Discount Amount**
- **Alteration Created** - Date
- **Alteration Completed** - Date
- **Sale Created** - Date
- **Sale Ready Date**
- **Due Date**
- **Production Due Date**
- **Paid Date**
- **Item Type**
- **Item Barcode**
- **Item Brand**

- **Colors**

Customers

- **Customer ID**
- **Full Name**
- **First Name**
- **Last Name**
- **Company**
- **Is Active**
- **Cell Phone**
- **Home Phone**
- **Email**
- **Billing Email**
- **Billing Address - Street**
- **Billing Address - Apt/Suite**
- **Billing Address - ZIP**
- **Billing Address - City**
- **Billing Address - State**
- **Delivery Address - Street**
- **Delivery Address - Apt./Suite**
- **Delivery Address - ZIP**
- **Delivery Address - City**
- **Delivery Address - State**
- **Date When Added to Route**
- **Route Stop Number**
- **Register Date** - Signup date, not necessarily first visit date
- **Register Location**
- **Registered By** - Employee
- **First Visit Date**
- **First Visit Amount**
- **Second Visit Date**
- **Second Visit Amount**
- **Third Visit Date**
- **Third Visit Amount**
- **Fourth Visit Date**
- **Fourth Visit Amount**
- **Fifth Visit Date**
- **Fifth Visit Amount**
- **First Return Date**
- **First Return Amount**

- **Second Return Date**
- **Second Return Amount**
- **Third Return Date**
- **Third Return Amount**
- **Fourth Return Date**
- **Fourth Return Amount**
- **Fifth Return Date**
- **Fifth Return Amount**
- **Last Visit Date**
- **Agent**
- **Delivery Preference** - Account Delivery Setting, ex: Regular or Will Call
- **Route**
- **Group**
- **Billing Account** - Account that this customer's orders are billed to
- **Delivery Account** - Account that this customer's orders are delivered with
- **Paid with Master Account** - Yes/No, is this customer billed to another master account?
- **Promotion** - Permanent customer promotion set up in customer profile
- **Payment Setting**
- **Total Spending** - Total spending all time
- **Monthly Spending** - Avg per month, using all time spending
- **Number of Orders**- All time
- **Number of Pieces** - All time
- **Current Balance** - Statement customers only, the balance that has NOT been billed
- **30 Balance** - 1-30 balance based on billed date for statement customers, and order A/R date for POS and autopay customer
- **60 Balance** - 31-60 balance *same dates as above*
- **90 Balance** - 61-90 balance *same dates as above*
- **91+ Balance** - 91+ balance *same dates as above*
- **Total A/R** - Total of all above A/R balances
- **Due Balance** - Total of all above A/R balances EXCEPT for "current"
- **Net Balance** - Total A/R Balance minus Credit Balance
- **Credit Balance** - Total available to use credits on account
- **Send Emails** - Account set to receive emails, yes/no
- **Send Texts** - Account set to receive texts, yes/no
- **Tax Exempt**
- **Apply Upcharges** - Do upcharges apply to this account, yes/no
- **Has Card on File** - Yes/no
- **Credit Card Status** - Active/Decline/Expired
- **Spending Demographic** - Almost No Spending / Low Spenders / Average Spenders / Good Spenders / Top Spenders (each 20% of the customer base, ex. Almost No Spending is 0-

20th percentile)

- **Locker Customer** - Is locker customer? Yes/no
- **Frequency (weeks)** - Average visit time in weeks, ex. if a customer averages a visit a month, frequency = 4 weeks
- **Lost (weeks)** - Customer flagged as Lost once they have no visit for 2x their Frequency (above). This displays in weeks how long a customer was lost
- **Spending Percentile**
- **Aging Inventory** - Days since earliest order that is ready to be picked up was readied
- **Referral Source** - Optional field in the system, if enabled creates a custom list of options for referral source
- **2018 Sales** - Customer sales total for 2018
- **2019 Sales** - Customer sales total for 2019

Deliveries

- **Route**
- **Customer ID**
- **Customer**
- **Delivery Preference**
- **Delivery Instructions** - Instructions that customer can add while scheduling online
- **Cleaning Instructions** - Instructions that customer can add while scheduling online
- **Address Type** - Billing/Home/Other
- **Address**
- **ZIP Code**
- **City**
- **State**
- **Vehicle** - Vehicle assigned to the driver's phone
- **Locker Barcode**
- **Delivery Status** - Scheduled / Completed / Missed / Cancelled / Deleted
- **Date Created**
- **Driver**
- **Created By**
- **Cancelled By**

Gift Cards

- **Transaction Reference** - Transaction reference number
- **GiftCard** - Gift card barcode
- **GiftCard Creation Date**
- **Transaction Amount**
- **Transaction Date**

- **Transaction Operation** - Redeemed / Sold
- **Transaction Source**
- **Transaction Staff Name**
- **Transaction Station Name**
- **Transaction Store Name**
- **Customer ID**
- **Customer Name**
- **Customer Agent ID**
- **Customer Agent**

Orders

- **ID** - Sale ID / Order #
- **Customer ID**
- **Customer**
 - Customer First Name**
- **Customer Last Name**
- **Customer Email**
- **Customer Phone**
- **Customer Company Name**
- **Customer Delivery Preference**
- **Paid with Master Account**
- **Address Type**
- **Address**
- **Apt./Suite**
- **ZIP Code**
- **City**
- **State**
- **Billing Account**
- **Delivery Account**
- **Agent**
- **Associated Store(s)** - Main Agent that this Agent is associated with, if set
- **Payment Setting**
- **Created By**
- **Return Location**
- **Extra Identifier** - ID / Room order field
- **External Barcode**
- **Status** - Order Status
- **Piece Count**
- **Price**

- **Paid Amount (inc. Deposits)** - Any payment, prepayment, or deposit amount linked to this order
- **Discounted Amount**
- **Before Discount Amount**
- **Total Tax**
- **Taxable Amount** - \$ amount of order that can be taxed, if only certain departments are taxable
- **Promotion**
- **Created**
- **Due Date**
- **Production Date**
- **Detailed Date**
- **Assembly Date**
- **Returned Date**
- **Ready Date** - Corresponds with time when last part of order is RACKED, which is when the order is marked as READY and goes into A/R
- **Paid Date**
- **Deleted Date**
- **Payment Method**
- **Paid By** - Employee
- **Promotion Added By** - Employee
- **Promotion Added Date**
- **Financial Department(s)** - Departments the order is comprised of, could be multiple
- **Group** - Group customer belongs
- **Notes**

Items

- **Sale ID** - Order number
- **Customer**
- **Customer Email**
- **Customer Phone**
- **Billing Account ID**
- **Agent**
- **Payment Setting**
- **Associated Store(s)**
- **Created By**
- **Return Location**
- **Piece Count**
- **Lot Status**
- **Item Status**

- **Price**
- **Applied Tax**
- **Discounted Amount**
- **Before Discount Amount**
- **Before Tax Amount**
- **Taxable Amount**
- **Non Taxable Amount**
- **Up Charge Amount**
- **Down Charge Amount**
- **Item Base Price**
- **Created**
- **Due Date**
- **Production Date**
- **Detailed Date**
- **Order Assembly Date**
- **Returned Date**
- **Ready Date**
- **Paid Date**
- **#Room/#Ref**
- **Guest Name**
- **Classification** - Item or surcharge? Surcharges populate Item KPIs as their own line item
- **Item Type**
- **Brand**
- **Item Description**
- **Special Cares**
- **Colors**
- **Fabrics**
- **Pattern**
- **Detailed by**
- **Pressed by**
- **Assembled by**
- **Removed by**
- **Returned by**
- **Production Value**
- **Financial Department**
- **Barcode**
- **Is New** - First time barcoding item
- **Category**
- **Item Assembly Date**
- **Item Pressing Date**

- **Item Removal Date**
- **Item Detail Date**
- **Item Spotting Date**
- **Item Repair Date**
- **Ticket Finished Date**
- **Item Bagged Date**
- **Item Pickup Date**
- **Item Deliver Date**
- **Item Return Date**
- **Last Location Label**
- **Last Location Barcode**
- **Last Racked by**
- **Last Racked Store**
- **Racked on Ticket**
- **Last Racked on Date**
- **Tax Zone**
- **Surcharge Name**



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