



EverConnectSM
by Evercommerce

Table of Contents

Table of Contents.....	2
Direct & Live Product Billable Criteria	4
Duplicate Lead Criteria	7
Market Place- Call Verified	8
Market Place- Reseller Interested (i.e. Auction lead).....	8
Appliance Repair.....	9
Awnings.....	10
Basement Refinishing.....	11
Bathroom Remodeling	12
Biohazard	13
Cabinet Refacing	14
Carpet Cleaning	15
Closets	16
Electrical.....	17
Gutter Helmet (Gutter Protection).....	18
Gutter Protection- Live (33MR clients)	19
Gutter Installation.....	20
Fire Damage	21
Floor Coating.....	22
Hardscape.....	23
HVAC	24
Kitchens	25

Lawn Care.....	26
Mold.....	27
Mold Testing.....	28
Painting	29
Pet Waste Removal	30
Pest Control	31
Plumbing	32
Roofing.....	34
Siding	35
Stairlifts.....	36
Sunrooms.....	37
Water Damage.....	38
Water Filtration.....	39
Windows.....	41

Billable Criteria

Direct & Live Product Billable Criteria

Overall

- All leads -- regardless of product -- should be for the following:
 - Homeowner or authorized decision maker
 - Looking for service on a residential property -- **but depending on the category** -- can be mixed use
 - If the vertical does not specify that they **DO NOT** accept commercial properties, send the lead
 - Commercial properties are defined by the building, not the business
 - The property must be within the territory specified by the client with an interest in the product or service agreed upon service category with the client
 - Clients are required to go to the property for free
 - Exceptions:
 - HVAC, Plumbing and Electrical (\$100 maximum trip/service charge)
- Repairs to existing products are not considered qualified for any product or services
- All services leads must be for the specifically contracted services
- All remodeling leads must be for both product and installation

Lead Reviews/Disputes

- Direct: All reviews/disputes must be submitted within 5 business days of receipt
- Live: Billing cycle Monday to Sunday. Disputes are due by Tuesday at Noon Eastern
- Marketplace: All tickets submitted with 30 days.

Live- direct to contractor Calls -“Poorly-Handled” Criteria

In all instances, this criteria will result in a billable call/lead

- Missed calls
 - Four rings or more, no answer
 - Call goes to voicemail
 - IVR answering services or prerecorded messages
- Refusing a call center transfer
- Exchanging contact information for later follow-up
- Setting an appointment with a tenant or non-decision maker
- Providing the customer pricing over the call
 - Exception
 - Carpet Cleaning
 - Covid Cleaning (Biohazard)
- Providing a referral for a service client does not provide
- Charging a price/fee for in-home estimate
 - Exception:
 - Carpet Cleaning

[Click Here to jump to the Table of Contents](#)

Duplicate Lead Criteria

Duplicate Lead Criteria (inter-company/Between Companies)

When a lead comes in across both organizations

- Lead that comes in first wins, secondary lead is refunded if disputed
- 72 hours or less time frame between first and second lead

Duplicate Lead Criteria (same product)

Overall

- 30 days for Direct for same name, zip and product-
- 7 days on live
- 30 days for Marketplace for same PII and same product - No returns for shared leads received from secondary source.

[Click Here to jump to the Table of Contents](#)

Market Place- Call Verified

Overall

- Must be the homeowner or authorized decision maker
- Interested in a new installation of the product (i.e. new roof, bathroom remodel, 2 + new windows)
- In windows category, must be interested in 2 + windows of any type

Non-Billable Lead Criteria

- No repairs
- Wants to use insurance claims or government funding as payment source

Market Place- Reseller Interested (i.e. Auction lead)

Call Center

- Verified correct contact info
- Interested in the service type in question
- The job is not done yet
- It is not a wrong number
- Speaks English

Auction

- Zip code is within target
- Question responses match lead store requirements

Non-Billable Lead Criteria

- Wants to use insurance claims or government funding as payment source

[Click Here to jump to the Table of Contents](#)

Appliance Repair

Overall

- Major Appliance Repair or Installation Services (Washer, Dryer, stove, refrigerator, dishwasher, in wall mounted microwave, oven, trash compactor, freezer, wine fridge)

Non-Billable Lead Criteria

- No small appliances (toaster blender etc)

[Click Here to jump to the Table of Contents](#)

Awnings

Awnings Billable Lead Criteria

Overall

- Must attach to the house

Non-Billable Lead Criteria

- No fixed or stationary (over doorways or windows)
- No mobile homes
- No RVs
- No campers

[Click Here to jump to the Table of Contents](#)

Basement Refinishing

Overall

- Full finished room or area -- including walls, ceiling and floors

Non-Billable Lead Criteria

- N/A

[Click Here to jump to the Table of Contents](#)

Bathroom Remodeling

Bath Billable Lead Criteria

Overall

- All remodels that include the wet area are considered billable
- Full remodels are billable if the lead is interested in the wet area
- Tile/wall-only leads are considered billable
- Tub-only leads are considered billable
- Call Center will send over bathroom layout changes, clients may return if they do not accept it
- Leads in high-rise buildings will be sent to client, clients may return if work cannot be completed
- Liners are non-billable only on **No-Liner** campaigns
 - No Liner campaigns
 - ReBath+

Non-Billable Lead Criteria

- Not interested in wet areas
- Wants to add bath where one does not exist
- Wants to use insurance claims or government funding as payment source
- Only wants reglazing

[Click Here to jump to the Table of Contents](#)

Biohazard

Biohazard Billable Lead Criteria

Overall

- Crime scene cleanup is billable
- Unexpected death is billable
- Blood cleanup is billable
- COVID-19 cleaning is billable

Non-Billable Lead Criteria

- Damage in Vehicles -Cars, Trucks, RV's, Trailers
- Hoarding not a required service - if appointment is set it is billable (Do not score, leave blank with proper notes)
- Cleaning up of animal or human feces or vomit
- Disposal of hazardous materials(Paint, Gas, Oil, Acid, Needles, Fertilizer, or Medical Waste)
- General house cleaning
- Appliance Cleanup or Appliance Removal- rotted food
- Pepper Spray Cleanup
- Meth or any Drug removal/ cleanup
- Landfill/ Trash removal

[Click Here to jump to the Table of Contents](#)

Cabinet Refacing

Cabinet Refacing Billable Lead Criteria

Overall

- Billable-Interested in changing/updating the look of the existing cabinets in the Kitchen

Non-Billable Lead Criteria

- No repainting if they tell us upfront
- No partial areas
- No bathroom vanities
- No fixture-only
- No change of layout

[Click Here to jump to the Table of Contents](#)

Carpet Cleaning

Carpet Cleaning Billable Lead Criteria

Overall

- Client must accept non-emergency and emergency services
- Cleaning of carpets and rugs.

Non-Billable Lead Criteria

- Contractor is permitted to give pricing of the job and if the customer declines, it's Non-Billable
- Vehicles

[Click Here to jump to the Table of Contents](#)

Closets

Closets Billable Lead Criteria

Overall

- Must be within current layout

Non-Billable Lead Criteria

- TBD

[Click Here to jump to the Table of Contents](#)

Electrical

Electrical Billable Lead Criteria

Overall

- Client must accept non-emergency and emergency services
- Repair and install are included.
- Appointment must be within 24 hours of the call, unless the customer requests it or allows it
- If an appointment (info exchange) is made regardless of the service needed
- Trip fee/Service Fee- \$100 Max

Non-Billable Lead Criteria

- Commercial jobs can be turned away if they aren't licensed

[Click Here to jump to the Table of Contents](#)

Gutter Helmet (Gutter Protection)

Gutter Helmet (Protection) Billable Lead Criteria

Overall

- Roof must have a pitch

Non-Billable Lead Criteria

- No gutters **UNLESS** interested in Gutter Protection as well
- No downspouts only
- No fascia repairs
- No gutter cleaning **UNLESS** interested in Gutter Protection as well
- No mobile homes
- No shared roofs
- No condominiums or townhouses
- No HOAs
- No buildings over 3 stories
- No rubber or flat roofs
- No box gutters or gutters over 6-inches **UNLESS** they are willing to replace the current Gutters
- No interlocking metal roofs

[Click Here to jump to the Table of Contents](#)

Gutter Protection- Live (33MR clients)

Overall

- Roof must have a pitch

Billable Lead Criteria

- Looking to add gutter protection on their gutters to protect from debris getting in
- Send over even if looking for new gutters along with the gutter protection

Non-Billable Lead Criteria

- No Existing Service Calls
- No downspouts only
- No fascia repairs
- No gutter cleaning **UNLESS** interested in Gutter Protection as well
- No condominiums or townhouses
- No HOAs
- No buildings over 3 stories

[Click Here to jump to the Table of Contents](#)

Gutter Installation

Gutter Installation Billable Lead Criteria

Overall

- Must be new gutters
- No service/trip fee
- Gutter calls go direct on 33; forms to call center

Non-Billable Lead Criteria

- Gutter Cleaning
- No Repair
- No Partial Jobs

[Click Here to jump to the Table of Contents](#)

Fire Damage

Fire Damage Billable Lead Criteria

Overall

- Must accept fire damage, smoke damage, soot damage, and puffbacks
- Cigarette smoke calls will be sent to client, but allow them to return

Non-Billable Lead Criteria

- No board ups **UNLESS** an appt is scheduled - Charge for board up is \$100
- No content cleaning (Furniture, Clothing, etc.)
- No complete loss of the home

[Click Here to jump to the Table of Contents](#)

Floor Coating

Floor Coating Billable Lead Criteria

Overall

- Must accept request for coatings of Garage, Basements and Patios
- Residential, Commercial, and Industrial services are accepted

Non-Billable Lead Criteria

[Click Here to jump to the Table of Contents](#)

Hardscape

Hardscape Billable Lead Criteria

Overall

- Must be at least 10x10 (100 square feet) to pass to client
- Pavers only unless specifically stated otherwise

Non-Billable Lead Criteria

- Under 10x10
- Concrete jobs
- Pavement jobs

[Click Here to jump to the Table of Contents](#)

HVAC

HVAC Billable Lead Criteria

Overall

- Client must accept non-emergency and emergency services
- Repair and install are included.
- Trip fee/Service Fee- \$100 Max
- Must offer either same day or next day service.

Non-Billable Lead Criteria

- Commercial jobs can be turned away if they aren't licensed. Is billable if they set appointment.
- No air duct cleaning
- New construction – can be turned away as it is similar to commercial jobs
- Mini-Split – can be turned away, client specific
- Window units
- Boilers

[Click Here to jump to the Table of Contents](#)

Kitchens

Kitchens Billable Lead Criteria

Overall

- Kitchen Remodeling
- Looking to update/ remodel kitchen with new cabinets within the existing room

Non-Billable Lead Criteria

Must be the whole kitchen
No partial jobs
No bathroom cabinets

[Click Here to jump to the Table of Contents](#)

Lawn Care

Lawn Care Billable Lead Criteria

Overall

- Residential or Commercial Property
- Interested in Fertilization of the lawn

Non-Billable Lead Criteria

[Click Here to jump to the Table of Contents](#)

Mold

Mold Billable Lead Criteria

Overall

- Mold removal inside the home, basement or crawl space - there needs to be visible mold present or have already had it tested and received the results.
- If it's mold testing and they give pricing, set appointment, or give a referral - \$50 Lead cost
- Have to offer free estimate

Non-Billable Lead Criteria

- No mold testing **UNLESS** an appt is scheduled
 - Some states are very strict on mold and even with visible mold, it has to be tested
 - New York , Texas, Florida and California
- No mold removal on automobiles or on outdoor surfaces (roof, siding, outside bricks, porch) **UNLESS** the contractor schedules an appointment.

[Click Here to jump to the Table of Contents](#)

Mold Testing

Mold Testing Billable Lead Criteria

Overall

- Mold removal - need to have visible mold or already had it tested
- Have to offer free estimate
- If it's mold testing and they give pricing, set appointment, or give a referral - \$50 Lead cost

Non-Billable Lead Criteria

- No mold testing **UNLESS** an appt is scheduled (If scheduled for mold testing = \$50 lead cost)
 - Some states are very strict on mold and even with visible mold, it must be tested
 - New York, Texas, Florida and California

[Click Here to jump to the Table of Contents](#)

Painting

Painting Billable Lead Criteria

Overall

- Interior or Exterior projects
- Residential only
- No minimums on square footage/projects

Non-Billable Lead Criteria

[Click Here to jump to the Table of Contents](#)

Pet Waste Removal

Pet Waste Removal Billable Lead Criteria

Overall

- Customer **does not** need to be the homeowner, can be community managers, park rangers, etc.
- Residential or Commercial Properties
- Interested in removal of pet feces in yard, patio and sidewalks and/or lawn deodorization and/or brown spot treatment

Non-Billable Lead Criteria

- No indoor pet waste removal (furniture)

[Click Here to jump to the Table of Contents](#)

Pest Control

Pest Control Billable Lead Criteria

Overall

- Client must accept non-emergency and emergency services
- Residential or Commercial Property
- Interested in Control or removal of Bugs and insects, rodents and small animals (mice, rats, voles and moles)
- * If they refer or transfer a customer to another provider, the call is still Billable.

Non-Billable Lead Criteria

- No wildlife unless an appointment is set
(Deer, skunks, birds, raccoon, Capybara, ground hogs, cats, dogs, snakes, squirrels are examples of non-billable wildlife)

[Click Here to jump to the Table of Contents](#)

Plumbing

- Client must accept non-emergency and emergency general plumbing services
- Trip fee \$100 max
- Must offer either same day or next day service, unless the customer requests it or allows it
- If an appointment (info exchange) is made regardless of the service needed
- Drain cleaning, snaking of drains can't be turned away

Non-Billable Lead Criteria

- Commercial jobs can be turned away if they aren't licensed.
- No septic calls - no cleaning out septic tanks
- Gas Plumbing Services - not every plumber is licensed to do gas. Some will accept and others will decline
 - Gas Line Repair and replacement
- Water filtration- Some will accept, and others will decline
- Irrigation (Landscaper)
- Wells or Well Pumps
- Fire Sprinklers
- Installing Appliances - such as Dishwasher, Washer, Dryer
- Installing Tubs, shower, sinks
- Backflow testing
- Plumbing for pool or a RV
- Grease Trap

[Click Here to jump to the Table of Contents](#)

The following are considered general plumbing services for billable calls

General Plumbing Services

- Drainage
 - Clogged Drain lines, Backflow prevention,
- Water Supply Services - Installation , repair and inspection
 - Hot/Cold Water Supply- leaks
 - Hot water tank installation
 - Tankless Hot Water Heaters can be declined and not billed as not all Plumbers service them
 - Water Softeners
 - Water Pressure
- Emergency Plumbing
 - Water Leaks, Outside/Inside hose connections
 - Emergency Shut-off
- Sump Pumps Services
- Garbage Disposal Services
- Plumbing Fixtures (sinks, toilets, faucets, tub/shower)

[Click Here to jump to the Table of Contents](#)

Roofing

Roofing Billable Lead Criteria

Overall

- Full roofing installation with the specific materials offered by the client
- Rubber, flat-roofs or metal roofing leads are client-specific
- Commercial leads are billable and will be sent to client
- Commercial roofing client exceptions:
- New construction is considered billable
- Repair to roofing Exceptions
 - CB Roofing

Non-Billable Lead Criteria

- No inspections
- No vent repairs
- No flashing-only requests
- Repair only
- Government funding as payment source or looking for free roof program

[Click Here to jump to the Table of Contents](#)

Siding

Siding Billable Lead Criteria

Overall

- Full siding jobs-only- 2 + Walls
- New construction is considered billable

Non-Billable Lead Criteria

- No repairs
- No partial jobs
- No Government funding as payment source or looking for free siding program

[Click Here to jump to the Table of Contents](#)

Stairlifts

Stairlifts Billable Lead Criteria

Overall

- Must utilize existing stairs

Non-Billable Lead Criteria

- No rentals of the stairlift
- No removal of existing stairlifts
- No buy-backs of existing stairlifts
- No chairs/recliners
- No lifts for cars
- No lifts for tubs
- No lifts for beds

[Click Here to jump to the Table of Contents](#)

Sunrooms

Sunrooms Billable Lead Criteria

Overall

- New installation only

Non-Billable Lead Criteria

- No screens-only
- No windows-only

[Click Here to jump to the Table of Contents](#)

Water Damage

Water Damage Billable Lead Criteria

Overall

- All emergency & non-emergency calls are considered billable
 - Emergency response time must be **90 minutes** (30 minutes is listed on website)
- **Crawl space** or **sewage calls**/requests are considered billable
- Groundwater and non-insured loss calls/requests are considered billable
- Telling customer to contact another provider (contractor, plumber, etc.) will result in the call being considered billable
- Telling customer to contact insurance first will result in the call being considered billable

Non-Billable Lead Criteria

- Water damage in a vehicle or a RV is not billable
- Water damage in the front or back yard that hasn't affected the property is not billable

Poorly Handled Criteria:

In the following scenarios, the lead should be marked as billable and the Poorly handled box checked with detailed notes:

- The contractor tells the homeowner to call a plumber or fix the water issue and does not offer to go out and assess the situation.
- The contractor refuses service to any of the scenarios listed above
- Job pricing is provided on the call

[Click Here to jump to the Table of Contents](#)

Water Filtration

Water Filtration Billable Lead Criteria

Overall

- Full Installation of new systems
 - Water Filtration , Softening, Conditioning, , Reverse Osmosis & UltraViolet Filtration

Non-Billable Lead Criteria

- No Repairs
- No Commercial Properties

[Click Here to jump to the Table of Contents](#)

Windows

Window Billable Lead Criteria

Overall

- Call center sends over all requests for two or more windows
- Bay, bow and picture windows are exempt from the minimum

Non-Billable Lead Criteria

- No new construction
- No adding a window where one does not exist
- No entities higher than three stories
- No mobile homes
- No basement windows
- No glass block
- No skylights
- No storm windows unless offered in criteria
- No egress windows
- No glass-only
- No repairs
- No Government funding as payment source or looking for free window program

[Click Here to jump to the Table of Contents](#)