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**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.

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**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

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# 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.

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# 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

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# 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)

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# 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

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# Basement Refinishing

Overall

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

Non-Billable Lead Criteria

* N/A

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# 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

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# 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

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# 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

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# 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

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# Closets

**Closets Billable Lead Criteria**

Overall

* Must be within current layout

Non-Billable Lead Criteria

* TBD

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# 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

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# 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

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# 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

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# 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

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# 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

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# 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

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# 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

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# 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

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# 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

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# Lawn Care

**Lawn Care Billable Lead Criteria**

Overall

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

Non-Billable Lead Criteria

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# 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.

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# 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

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# Painting

**Painting Billable Lead Criteria**

Overall

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

Non-Billable Lead Criteria

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# 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)

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# 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)

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# 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

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**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)

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# 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

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# 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

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# 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

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# Sunrooms

**Sunrooms Billable Lead Criteria**

Overall

* New installation only

Non-Billable Lead Criteria

* No screens-only
* No windows-only

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# 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

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# 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

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# 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

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