

Manual Tags Added By User

Identifies Manual Tags Added To The Lead By The User

Source Change Tags

Staff Manually Adds Tag To Update The Source To Identify Where The Lead Opted In From

- manual - facebook
- manual - google
- manual - referral
- manual - tik tok

Opportunity Stage Change Tags

Lead Manager Adds Tag and Wants To Move The Lead To A NEW Opportunity Stage

- manual - initial lead
- manual - hot
- manual - tasked
- manual - warm
- manual - extended
- manual - lost
- manual - won
- manual - abandoned
- manual - nagf

Appointment Status Tags

FOS/LM Adds Tag to Update Appointment Status AND Move the Leads Opportunity Card

- manual - cancelled/abandoned
- manual - cancelled/nagf
- manual - cancelled/reschedule
- manual - cancelled/tasked
- manual - no show/abandoned
- manual - no show/nagf
- manual - no show/reschedule
- manual - showed/consultcomplete

Contact Details:

Identifies Lead Specific Details for In house Use

- alert (use when you need CSM to look into a lead)
- spanish - alert (Spanish Vertical - use when you need CSM to look into a lead)
- fb spam (use when lead is Facebook SPAM)
- fbmessenger spam (use when lead is Facebook Messenger SPAM)
- google spam (use when lead is Google SPAM)
- instagram spam (use when lead is Instagram SPAM)
- number not valid (use for any invalid numbers)
- cost (use when lead is marked NAGF due to the cost of service)
- insurance (use when lead is marked NAGF due to the insurance)
- out of area (use when lead is located outside the office area)
- no longer interested (use when lead is no longer interested in booking)
- low quality (use when lead is low quality - make sure to add notes)
- paperwork error (use when paperwork link is erroring in SMS)
- transfer (use when lead transfers to another office)

Tags Added Automatically By "The Nest"

Appointment Tags

- appt new
- confirmed
- hard confirmed
- appt showed
- appt cancelled
- appt no-show
- appt need to reschedule
- appt invalid
- cancel + tasked
- cancel + nagf
- cancel + abandoned
- no-show + nagf
- no-show + abandoned

Email Tags

Identifies Email Verification Results or Compliance

- bounced email
- complained email
- email-validate-error
- email-validate-invalid
- email-validate-valid
- unsubscribed from email

Text/SMS Tags

- call only (line is not sms capable)
- twilio validation error (varies - see help doc pdf)

Source: Tags Automatically Added By The Nest

Identifies What Source the Lead Came In From

- chat widget
- facebook
- fbmessenger
- inbound webhook
- dbrlead
- website
- tiktok
- sciatica
- spam
- spanish

No Call No Show Tags

Added by Workflow After Lead Replies With Reason for No-Show

- NS: Admin Tag
- NS: Forgot! It Happens Tag
- NS: Found Treatment Elsewhere Tag
- NS: No Longer Interested Tag
- NS: No Reply Tag
- NS: Something Came Up Tag
- NS: Too Far Away Tag

Miscellaneous:

- inbound - already a contact
 - (lead came in first as FB and then opted in again to website/Google form)
- paperwork
 - (lead clicked the paperwork trigger link)
- unsubscribed from text
 - (lead replied 'stop')
- use in dbr
 - (abandoned but can be contacted later)
- landline
 - (lead receives calls only)