# Tracking Chart

| Funnels | What is the step by step journey users take in your app / website | | | | | Funnel Types |
|---|---|---|---|---|---|---|
| | Step 1 | Step 2 | Step 3 | Step 4 | Step 5 | |
| **Lead** | interact with lead gen | click thru | view onsite lead gen | choose box | signup | *Acquisition* |
| Sign Up old | enter zip code popup | choose box | freq popup, cart popup | view cart, register | pay, submit | *Activation* |
| **sign up 9.0** | enter zip code | choose box | choose size/freq | account, delivery | **pay, submit** | |
| Customize old | email click thru | login | customize dashboard link | customize | save | *Engagement* |
| **customize 9.0** | email click thru | login | customize dashboard link | **customize** | **save (autosave?)** | |
| Refer old | mention name for signup | cc manual check name | **cc manual add $10** | | | *Engagement* |
| Redeem old | type name in signup | cc manual check name | **cc manual add $10** | | | |
| **Refer 9.0** | login | email/fb/tw custom url | autotrack signup | **$10 credit auto applied** | | *Engagement* |
| **Redeem 9.0** | clickthrough signup link | custom id signup | autotrack signup | **$10 credit auto applied** | | |
| Vacation old | login | pick days (120 max) | **save** | back early | | *Retention* |
| **Skip 9.0** | login | view upcoming deliveries | skip a delivery | **confirm** | unskip | |
| Cancel old 1 | call cc | **cc delete recurring order** | user active, no recurring | | | *Retention* |
| **Delete a box 9.0** | login | view subscriptions | x btn to delete additional boxes | **submit** | | |
| **Cancel 9.0** | login | view subscriptions | cancel subscription btn | cancel popups x 5, **confirm (deactivates customer)** | log in, reselect box, and confirm payment to reactivate | |
| Get Help old | login | **visit faq** | pass/fail to get answer | fail, call cc | bypass faq - call cc | *Retention* |
| Get Help 9.0 | login | **visit faq** | pass/fail to get answer | fail, call cc | bypass faq - call cc | |

| Tracked Events | Sample Data | | | | | Notes |
|---|---|---|---|---|---|---|
| | Event Name | Property | Example Value | how to track | | |
| | **lead** | clickthru lead source data | facebook ad, 05/13, 3wk, title, content, etc. | **GA** Identify our lead sources | | custom segment for sources |
| | | box choice | large mixed produce | **GA** track all referrals | | all campaigns > acquisition > medium |
| | | location | Portland OR, 97035 | **GA** Set funnel events that originate with each source | | behavior > behavior flow for bounce |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | checkout step @ bounce + cumulative signup info | create account + no email | **Cordial** tracks events in signup process and gathers contacts of incomplete conversions | | utm post-click tracking should be automated through our email campaign provider. |
| | | | | **CrazyEgg** tracks source funnels and customer behavior onsite. | | events for specific data points |
| | | | | **FB** cross check referrals | | behavior > behavior flow for bounce |
| | | | | **Inst** cross check referrals | | page reports - requires chrome extension and enhanced link attribution |
| | | | | **Postie** cross check direct mail campaign referrals | | page report will show you bounce and areas with most clicks on the screen |
| | **Signup 9.0** | enter zip code | 97035 | **GA** Set an event to track conversion (successful signup) | | |
| | | choose box | fruit box | **GA** track email conversions | | |
| | | choose frequency/size | small/weekly | **GA** track friend referral conversions | | |
| | | create account | username: jennifer@test.com, pwd: 12345678 | **Cordial** tracks email conversions | | |
| | | add delivery details | delivery address: 123 Jones St., Portland OR, 97035, phone: 1234567890, billing address is same, no gate code, 'leave box on porch' | **Postie** Events track print campaign conversions | | |
| | | pay | cardholder name: jennifer rose, card number: xxx, exp mo: july, exp yr: 2021, reduced cost box request | **DBP** tracks order totals | | |
| | | (anytime during checkout) | discount coupon: FREETOTE15 | **DBP** tracks active customer count | | |
| | | | | **DBP** tracks new signups, new referral signups | | |
| | | | | **Imperfect** computes churn | | |
| | **customize 9.0** | email click thru | jennifer@test.com, location, date/time | **GA** tracks successful customization submits | | |
| | | login | dbp profile data, date/time | **Cordial** tracks customization preferences per user profile? | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | customize dashboard link | submit | **CrazyEgg** tracks user experience during customization | |
| | | | customize | customize-box selections, prices, order total, membership level discounts | **DBP** tracks active orders in customize window | |
| | | | save | submit | **DBP** cross check successful customizations | |
| | | | | | **DBP** tracks customization impact on inventory | |
| | | **Refer 9.0** | login | dbp profile stats | **GA** tracks Unique ID signups | |
| | | | email/fb/tw custom url | outlet,  ID | **GA** referral source for each (email, fb, copy/paste) | |
| | | | autotrack signup | signup data, ID | **GA** tracks referral user segment for business value | |
| | | **Redeem 9.0** | clickthrough signup link | outlet, ID | **DBP** tracks referral signup count | |
| | | | custom id signup | signup data, ID | **DBP** tracks $ value of referral accounts | |
| | | | autotrack signup | $10 credit, $10 credit | **DBP** referral source for each (email, fb, copy/paste) | |
| | | | | | **DBP** tracks profiles of referral /referree signups for business value opportunities | |
| | | **Skip 9.0** | login | dbp profile stats | | |
| | | | skip a delivery | date, dbp box stats | | |
| | | | confirm | submit | | |
| | | | unskip | submit | | |
| | | **Cancel 9.0** | cancel subscription btn | submit | | |
| | | | skip prompt | submit (cancel) submit (manage deliveries) | | |
| | | | choose subscription | checkbox selections, submit | | |
| | | | why cancel scale | 1-5 selection, submit | | |
| | | | satisfaction scale | 1-5 selection, submit | | |
| | | | customer notes | text input, submit | | |
| | | | cancel | submit | | |

| | | **confirm (deletes recurring order)** | user active, no recurring | | | |
|---|---|---|---|---|---|---|