

CAD**details** Analytics

USER GUIDE



CADdetails

services.caddetails.com

CADdetails Analytics

Welcome to the user guide for the CADdetails Analytics product. This guide explains all the elements, functionalities, and data sources on the CADdetails Analytics dashboards.

Two distinct dashboards are available to you: the **Performance Summary** and the **Design Firm Leaderboard**. The Performance Summary reveals marketing exposure, engagement, and product performance on CADdetails.com. The Design Firm Leaderboard presents week-over-week changes in your most recommended design firms based on their intent within your product categories.

We hope these new features and functionalities enable you to learn more about your audience and take action based on key product and audience insights. These analytics dashboards are designed for building product manufacturers to enhance your CADdetails Analytics experience and help you achieve your business goals.

As we continue to iterate and improve this product, we hope you will provide feedback to help us create cutting-edge analytics products for years to come.

Thank you.

The CADdetails Privacy Policy and Terms & Conditions specified in your contract will remain in effect throughout your use of the product. Based on client feedback and use cases shared with us, we may alter our Privacy Policy and/or Terms & Conditions at a later date.

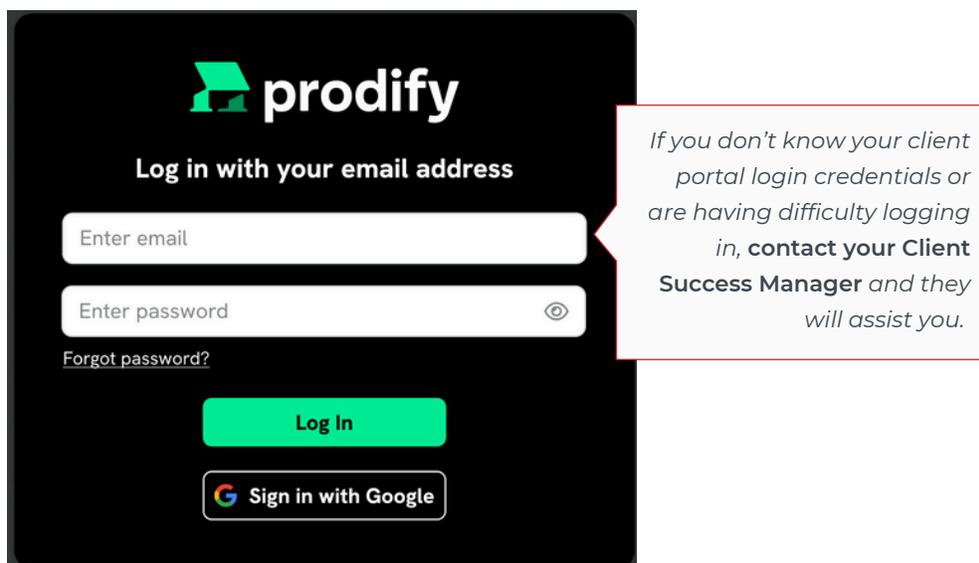
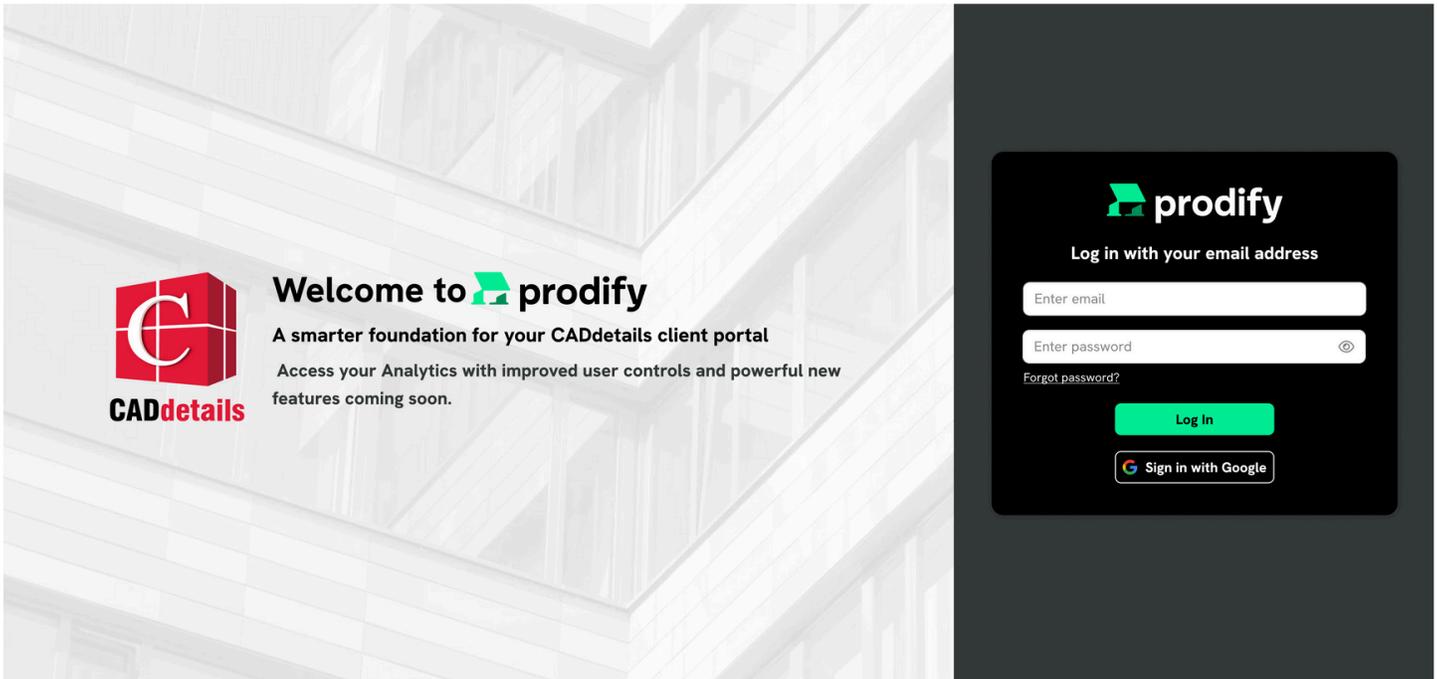
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General Information

Getting Started

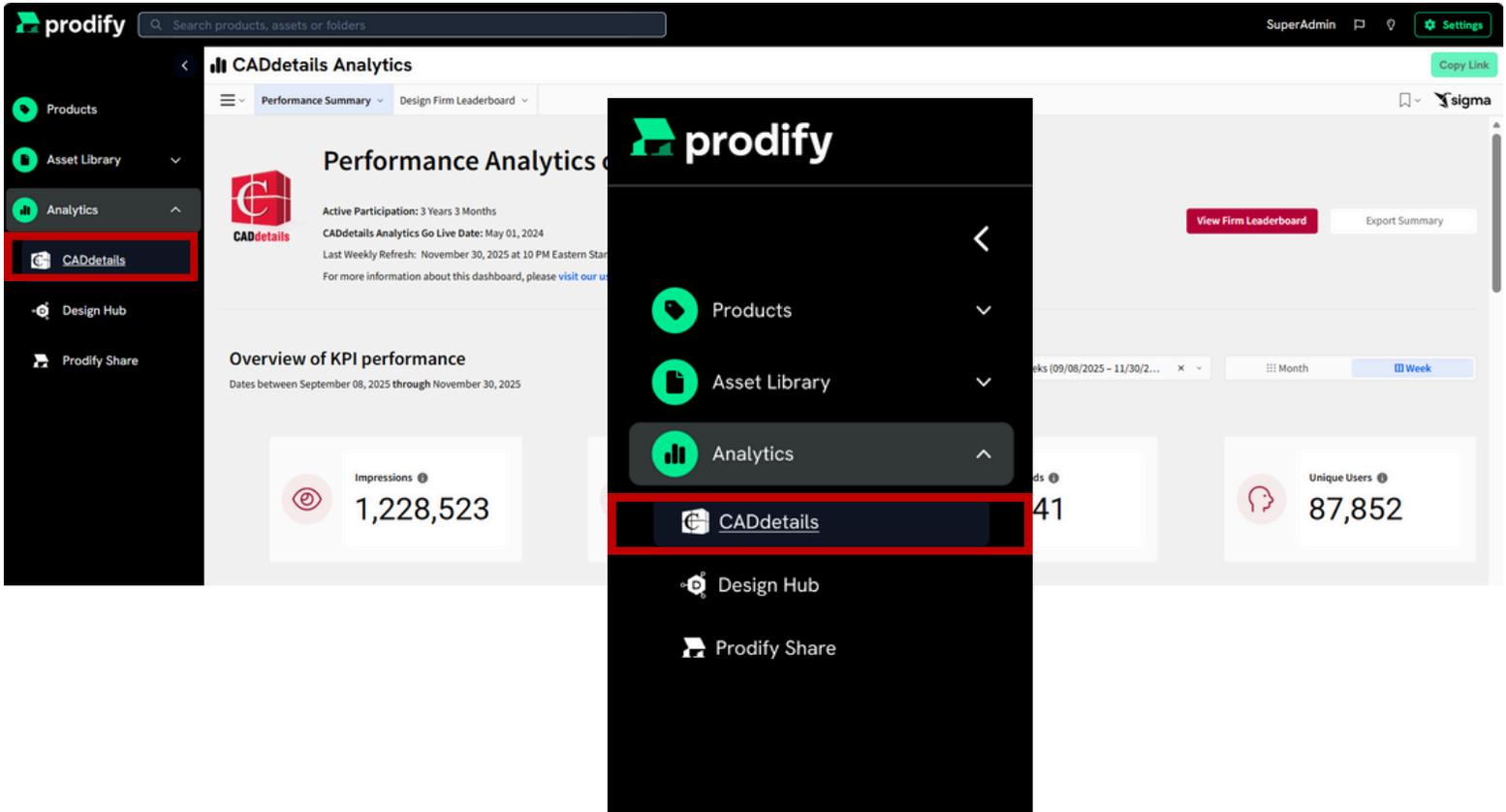
Accessing the Client Portal

Jump into the [client portal](#), enter your email, and password to log in.



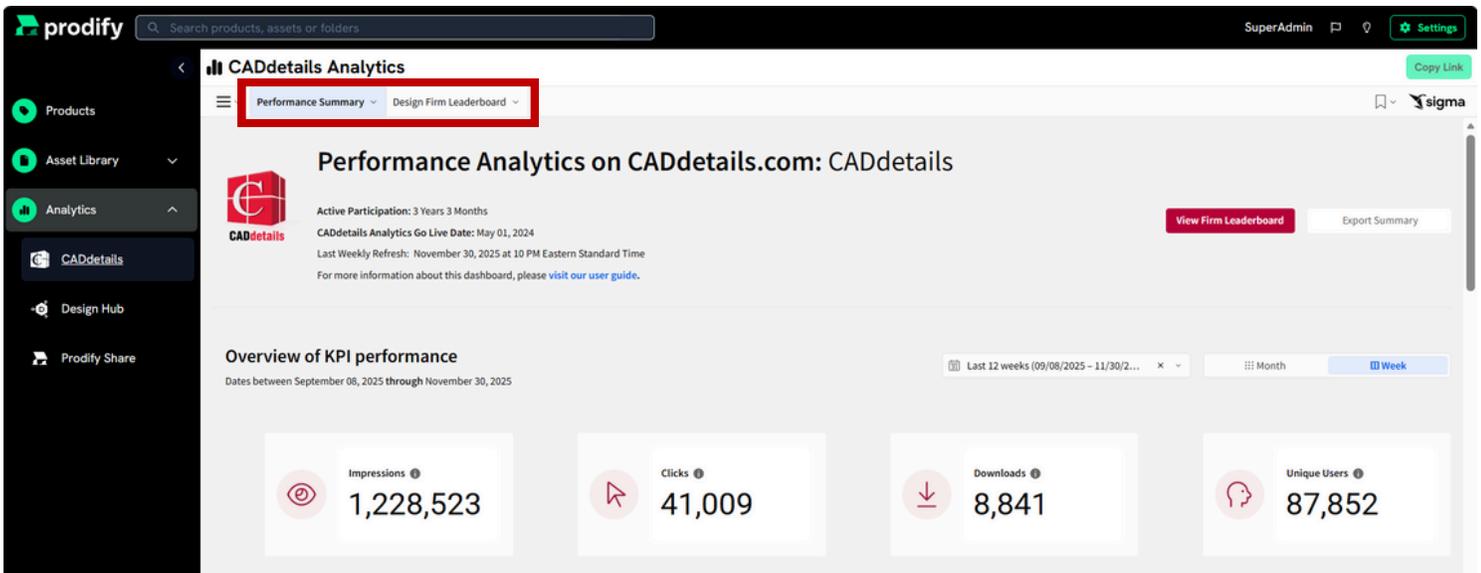
Navigating to the Analytics

Once logged in, expand the **Analytics** tab on the left-hand navigation panel and choose **CADdetails**.



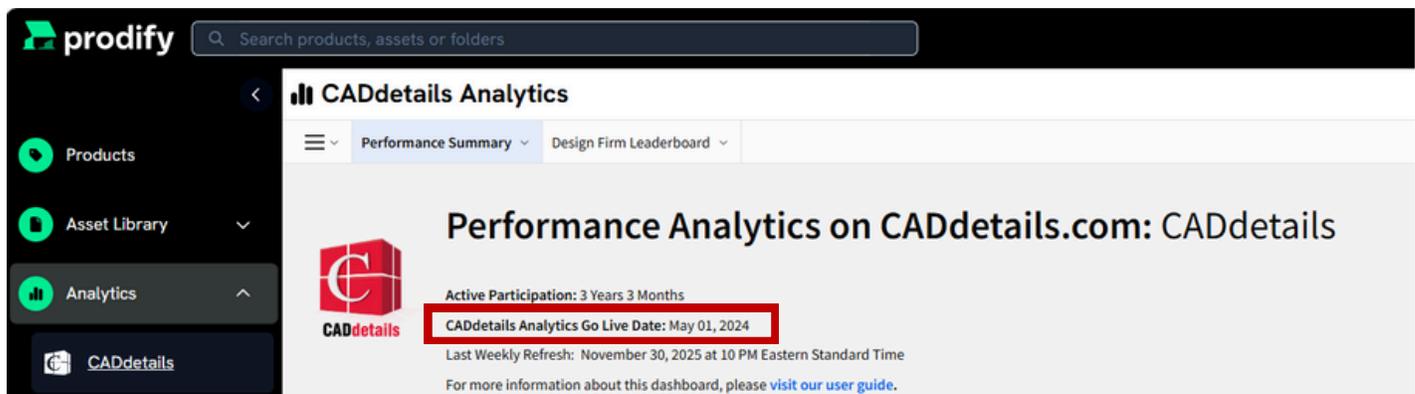
Loading Data

The data for the CADdetails Analytics will load and display two tabs: **Performance Summary** and **Design Firm Leaderboard**. Click on these tabs to navigate between dashboards.



Dashboard Overview

- The “Go Live Date” indicates the date when your CADdetails Analytics data is turned on, initiating data collection.
- The refresh schedule is weekly and is executed each Sunday at 10PM EST.
- You’ll be able to access the CADdetails Analytics data **30 days** after your “Go Live Date”. At this stage, your team will have at least 4 weeks of data to review.
- Data will continue to accumulate over time throughout your participation in the CADdetails Analytics program.
- All data goes through rigorous data hygiene and quality assurance procedures to ensure that robot and internal traffic are removed.
 - *CADdetails maintains data cleanliness best practices and updates our algorithms regularly to combat malicious activity on our site which can create anomalies in the data. This is a continuous process and can impact historical data.*

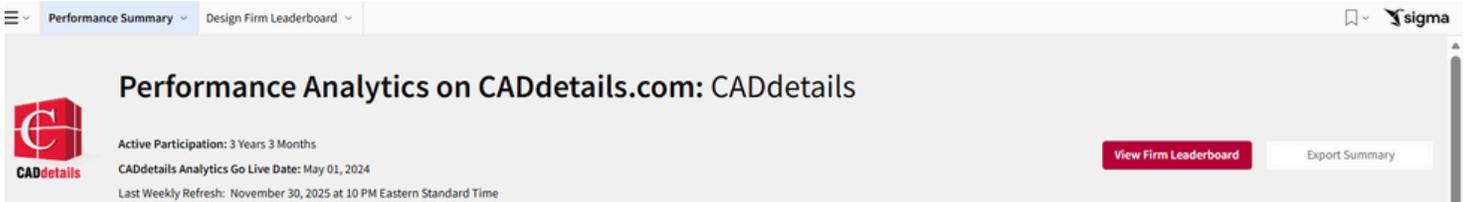


The screenshot shows the Prodigy interface with a sidebar on the left containing 'Products', 'Asset Library', 'Analytics', and 'CADdetails'. The main content area is titled 'CADdetails Analytics' and features a 'Performance Summary' tab. The dashboard displays the CADdetails logo, the title 'Performance Analytics on CADdetails.com: CADdetails', and the following information: 'Active Participation: 3 Years 3 Months', 'CADdetails Analytics Go Live Date: May 01, 2024' (highlighted with a red box), 'Last Weekly Refresh: November 30, 2025 at 10 PM Eastern Standard Time', and a link to 'visit our user guide'.

Performance Summary

Data Overview

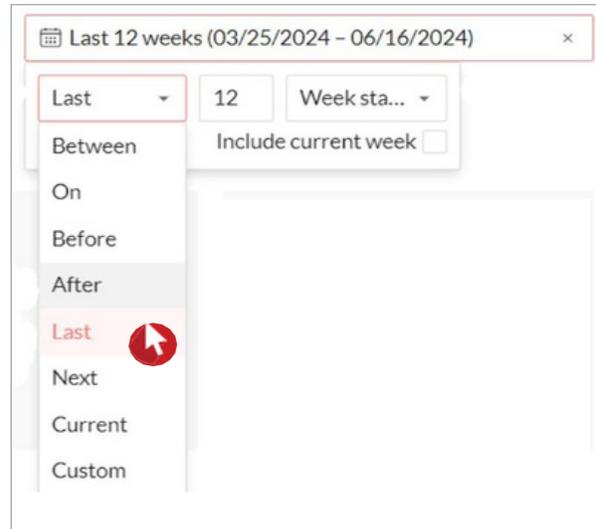
- The data in the Performance Summary shows confirmatory analytics about your exposure and engagement on CADdetails.com by AEC professionals.
- All activity on CADdetails.com involving your content is captured in the Performance Summary. This is driven by the engagement of **all visitors** who have been exposed to your content, including global engagement. Internal users and manufacturer interactions are filtered out.



Date Functions

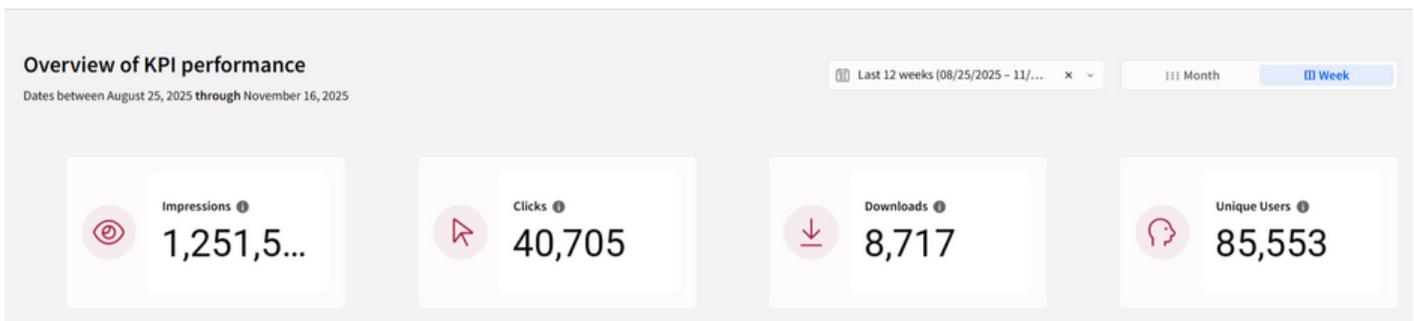
Date Range – Drop Down Options

- Click on the date filter to adjust the period displayed on this dashboard and choose from options like "between," "on," "before," "after," "last," and "custom" to specify the appropriate period.
- The selected date range is set to the last 12 weeks by default. You can change this to suit your needs by saving a Bookmark (see page 18) and then setting this bookmark as your default view.



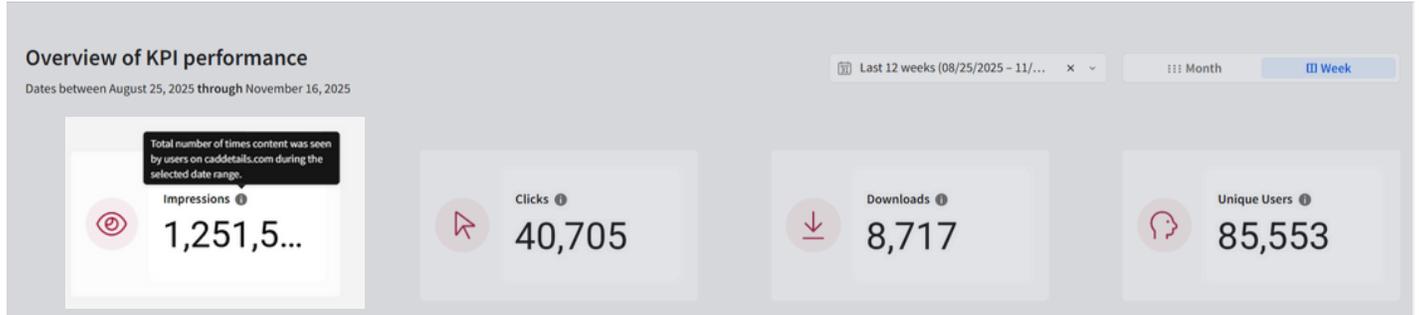
Data Aggregation

- Select the type of aggregation for the data. Weekly aggregation segments data weekly starting on Mondays. Monthly aggregation groups data by month of occurrence regardless of the day of the week.



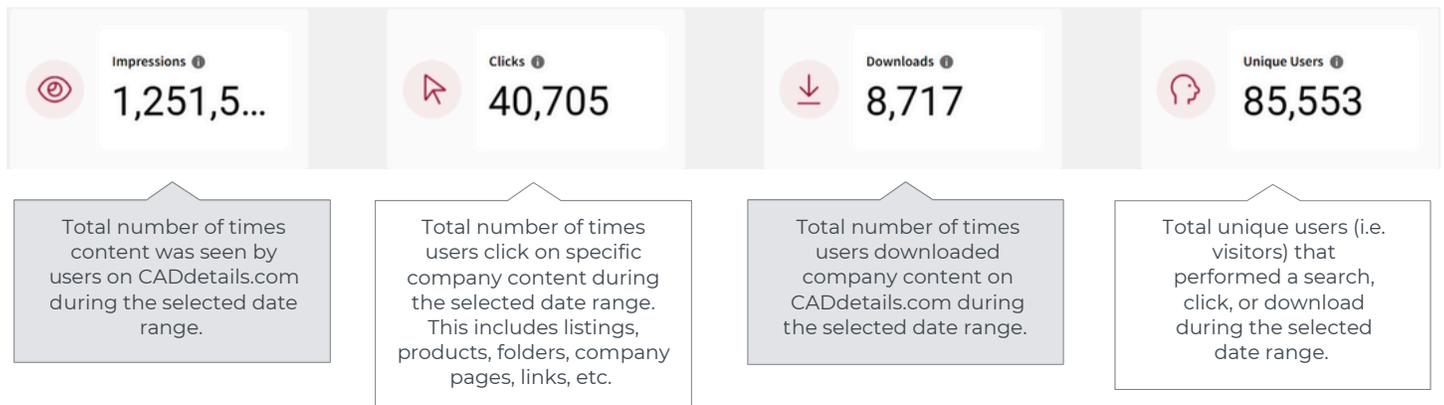
Key Performance Indicators (KPIs)

KPI Totals



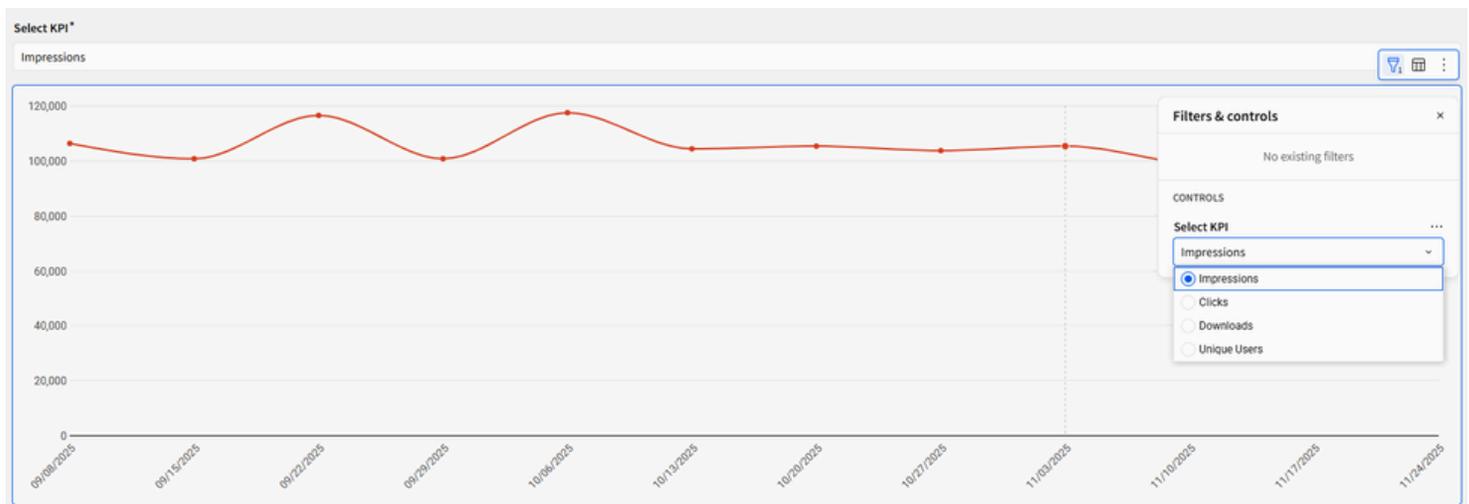
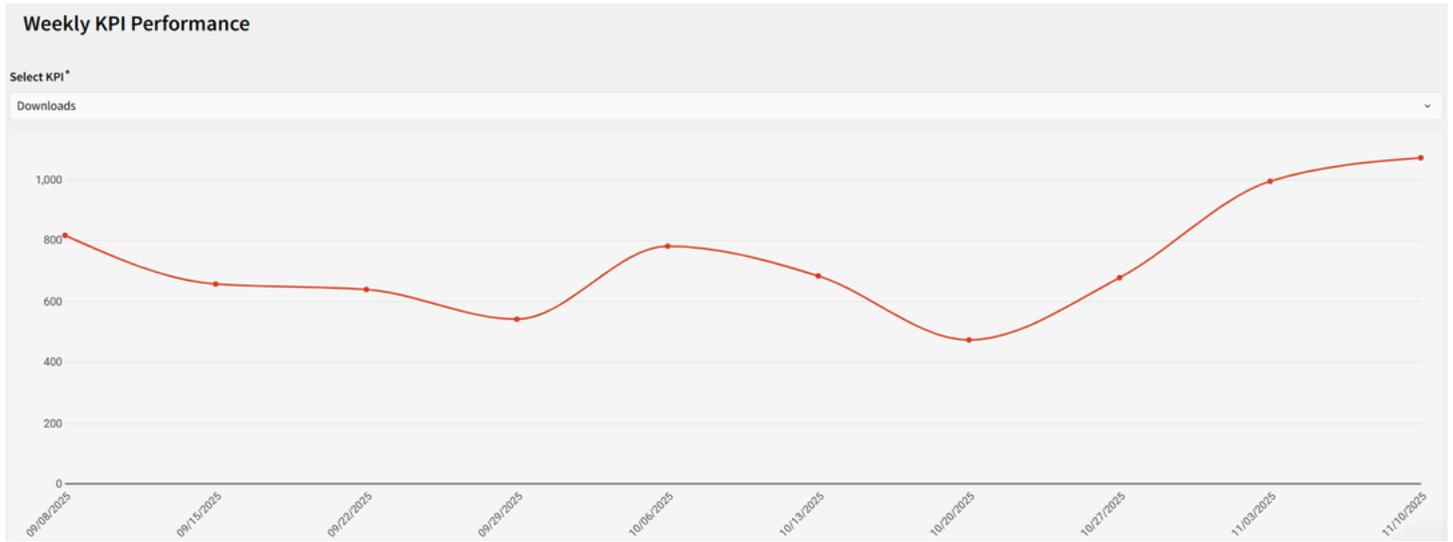
- The numerical value of each KPI represents the total for the date range as indicated under the KPI Performance section heading. Depending on the selected option for [Data Aggregation](#), these dates may not exactly align with the dates selected in the date range filter. Instead, they reflect the available weekly/monthly start dates respectively. Day-level data segmentation is not currently available.
- Each KPI included in your performance summary has an information icon which displays the definition of this metric when you hover over it.

KPI Definitions



Performance Over Time Visualization

- Show weekly/monthly aggregated KPI volumes trend over time.
- Selecting a KPI, either by using the drop-down filter **or** clicking on a specific total KPI, updates the visual to display that metric.



Analytics Insights Section

Analytics Insights
 Dates between August 12, 2024 through November 03, 2024

Month Week Last 12 weeks (08/12/2024 - 11/03/2024)

Top Performing Listings

Listing

Rank	Name	Engagement Score
1	Stacked Front Load 24 in Electric Dryer	100
2	Handicapped Parking Sign - Detail 1	69
3	Semi-Trailer Turning Radius	59
4	Handicapped Parking Space	58
5	Handicapped Symbol for Parking	55
6	32 Inch Wood Panel System for Interior Walls	48
7	Handicapped Parking Sign - Detail 3	47
8	Accessible Parking	43
9	Accessible Parking Layout W/ Sign	42
10	Concrete Curb System - Curb and Sidewalk	41
11	French Drain	40
12	Accessible Doorways - Two Hinged Doors in Series	39
13	Washer Front Load 4.2 cu ft	36
14	Paddle Tennis	35
15	Ramp Edge Protection - Curb	35

Top Listings & Projects

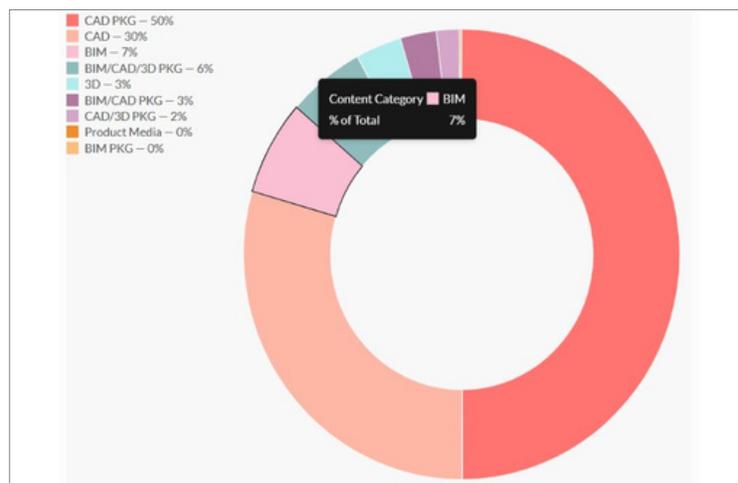
- Select 'Listing' or 'Project' from the Object Type drop down to display top performers in each of those categories.

- Summarizes the 25 top-performing listings and projects based on high intent conversion events (clicks and downloads) during the specified period.
- The Engagement Score is calculated through a proprietary algorithm that applies a normalized weighted score to conversion events on listings or projects.
- CADdetails' advanced tracking and data modeling assigns appropriate "weight" to specific conversion events based on intent, accurately reflecting which listings/projects have the best performance against your other content with engagement during the specified period.

Content Type Distribution

A pie chart showing the distribution of downloaded content types (e.g., CAD, BIM, 3D, specifications, etc.) during the selected date range.

- Specific file downloads are captured with the specific content type the user selected when they downloaded content (i.e. CAD, BIM, 3D, SPEC, and Product Media).
- When users select the "Download All" option while viewing specific content, this triggers a package download. In this case, the content type includes the "PKG" suffix following the specific content types present in the package download (i.e. CAD PKG, CAD/BIM/3D PKG, etc.).



CADdetails Analytics User Guide - Performance Summary

Design Firm Leaderboard



Design Firm Leaderboard: Dunder Mifflin

Empower your team with tailored design firm recommendations. Our proprietary algorithm is built to recommend the highest intent active design firms based on their engagement with your content and similar content across our site. For more information about this dashboard, please [visit our user guide](#).

View Performance Dashboard

Export Data

- Identify high-intent active design firms based on the quality and quantity of their recent relevant activity.
- See week-over-week changes in U.S.A. and Canadian firm engagement over the last 12 weeks.
- Understand your audience, and filter the data to investigate industry, region, and profession distribution.
- View specific user-level data by drilling down beyond the firm.

Data Overview

- CADdetails' proprietary algorithm is built to recommend the highest quality active design firms based on their engagement with your content and similar content across CADdetails.com and your Design Hub (if applicable). Each week you can compare weekly changes in rank for the top 250 design firms qualifying for your leaderboard.
- This dashboard shows the most relevant active design firms in the last 12 weeks based in U.S.A and Canada. Results are thoughtfully quality controlled to isolate your target audience, removing irrelevant information such as unaffiliated student activity as well as manufacturer and internal engagement.
 - *As with the performance dashboard, data is continuously cleaned and evaluated for robot activity and invalid registration data. As a result, changes can be observed over time to ensure that only the most accurate and relevant data is presented.*
- Help marketing and sales teams identify high intent design firms, understand audience engagement, discern user preferences, nurture relationships with clients, and customize outreach strategies at an account level.
- Geolocation (City, State/Province, Country, and Zip/Postal Code) of each firm is presented based on the most active branch for each firm or the firm headquarters when available.
- Firm data is enriched to include informative metadata including LinkedIn, website, employee counts, and industry (if available).

Filters

Selecting from the drop-down options will filter the Leaderboard and the Audience Insights section. Select multiple values from each filter to derive specific marketing insights.

The following filter options are included to help you segment the leaderboard and obtain specific insights:

- Design firm filters: Country, State/Province, and Industry

Country ⓘ

Select values ▼

Filter to show either Canadian or U.S.-based design firms derived from the location of the firm's most active branch.

State / Province ⓘ

Select values ▼

Filter by a design firm's state/province designation based on the location of their most active branch. Note that office branches from different locations can contribute to a firm's overall activity.

Industry ⓘ

Select values ▼

Filter based on a design firm's industry (if available).

- User Filters: Top Product Category and Profession

Top Product Category ⓘ

Select values ▼

Filter by the most popular product category for relevant users employed by design firms on the leaderboard.

Profession ⓘ

Select values ▼

Filter by the specified profession of relevant users employed by each design firm on the leaderboard.

Leaderboard

Rank	Chan...	Intent Score	Design Firm	Last Signal	Country	State / Province	City	Zip / Postal
1	—	100	Gullatte Associates Inc	2025-11-28	United States	Georgia	Columbus	31901
2	↑ 12	98	J. Adamson & Associates	2025-11-25	United States	New Jersey	Egg Harbor T...	08234
3	↓ -1	97	Hess Landscape Architects, L...	2025-11-07	United States	Pennsylvania	Lansdale	19446
4	↓ -1	97	Parkerrodriguez, Inc.	2025-11-24	United States	Virginia	Alezandria	22314
5	↓ -1	94	Studio M Merge	2025-11-17	United States	California	Oakland	94602
6	↓ -1	89	Minno & Wasko Architects &...	2025-09-11	United States	New Jersey	Lambertville	08530
7	↓ -1	89	Protegee Design Company, LLC	2025-10-08	United States	Colorado	Denver	80202
8	✦ New	86	Robert Carl Williams Associ...	2025-11-30	United States	Vermont	Pittsfield	05762
9	↓ -2	86	Present Future Architects	2025-11-04	United States	Illinois	Chicago	60642
10	↓ -2	83	Bachich Associates	2025-11-22	United States	New Jersey	Ocean City	08226

The top 250 recommended Design Firms are ranked by intent score. Intent score is calculated through a proprietary algorithm based on quality, volume, and recency of engagement with your products and/or related product categories. Intent scores help identify firms most likely to convert (download or click on your content).

Intent Score Band	Design Firm Engagement
>80	Highest intent users/firms who interacted directly with your content recently and/or extensively.
55-80	Medium to High intent users/firms who either interacted directly with your content OR recently interacted with related product categories.
30-55	Medium Intent users/firms who interacted with related product categories.
<30	Low Intent users/firms who interacted with related product categories

Week over Week Change Indicators

- ↑ 13 Indicates a firm has risen 13 spots on your top 250 active design firm leaderboard since last week.
- ↓ -2 Indicates a firm has fallen 2 spots on your top 250 active design firm leaderboard since last week.
- Indicates a firm has maintained the same rank on your top 250 active design firm leaderboard since last week.
- ✦ New Highlights design firms new to your leaderboard this week.

User Level Data

The firms on the leaderboard can be expanded to show engaged users and their metadata by clicking in the **+** icon on the left side of the Leaderboard. Users, like design firms, are sorted from highest to lowest intent for each firm. User metadata includes last engagement signal, profession, branch location, favorite content type, and top product category. This data provides insight into firm collaboration and distinct contributors to project development.

Last Signal	User Name	Profession	Country	State / Province	City	Top Content	Top Product Category
2024-04-18	A** H*****	Architect	United States	Texas	Houston	BIM	Structural And Exterior Enclosure Pr...
2024-04-23	E*** S*****	Architect	United States	Texas	Houston	Packages	Site Products
2024-06-04	L**** S*****	Architect	United States	Georgia	Atlanta	Product Me...	Structural And Exterior Enclosure Pr...
2024-04-29	M***** R**	Architect	United States	Texas	Fair Oaks Ranch	CAD	Site Products
2024-06-03	F***** K*****	Architect	United States	California	San Francisco	Packages	Automatic Door Operators
2024-05-10	K*** G*****	Architect	United States	New York	New York	CAD	Waste Receptacles
2024-04-03	J***** G*****	Architect	United States	Georgia	Atlanta	BIM	Plumbing Specific Products And Equi...
2024-04-05	E*** S**	Architect	United States	California	Los Angeles	CAD	Openings Passages And Protection P...

Audience Insights

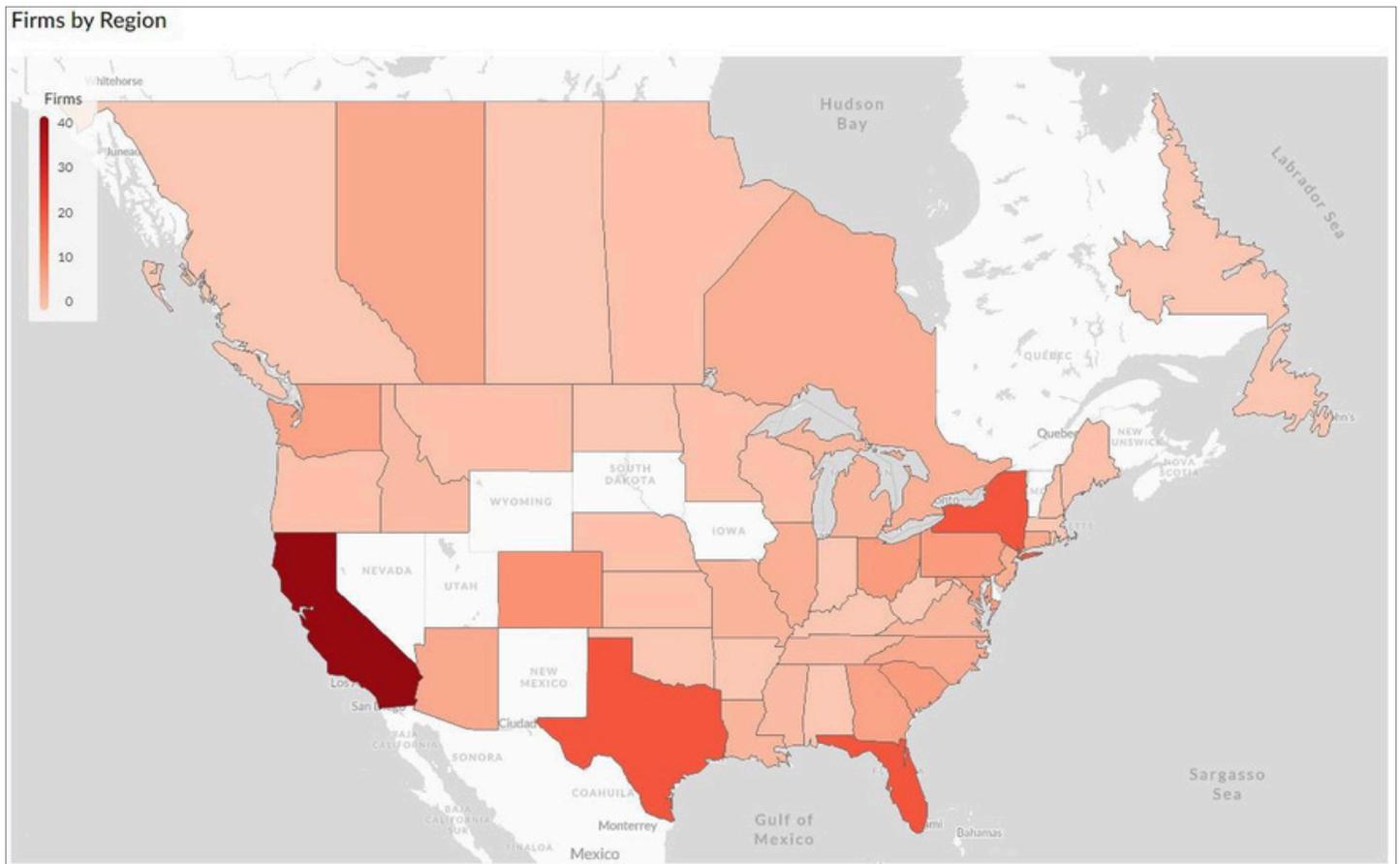
Audience Insights

The Audience Insights section visualizes aspects of the Leaderboard and reflects filter selections.

- Filters applied to the Leaderboard will update the *Firms by Region*, *User Distribution by Profession*, and *Firm Distribution by Industry* elements to reveal interesting trends in AEC user engagement.
- Leverage this data to inform your marketing and sales teams about your target audience from geographic, industry, and professional perspectives.
- You may click on any singular element (i.e. a state, an industry, or a profession) to quickly filter the entire dashboard on that element. Click outside of that element on the same visualization to clear the filter.

Firm Geographic Distribution

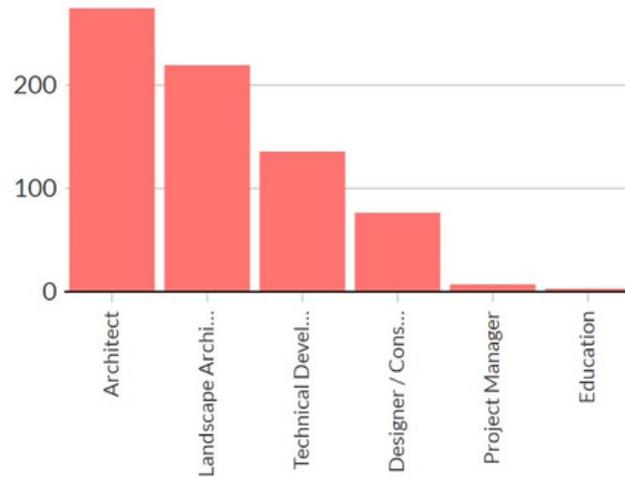
Map showing geographic distribution of firms on the leaderboard by state and province.



Professional Distribution

Visualize the breakdown of users associated with the firms on your leaderboard, by their specified profession as defined in our robust database of AEC user data.

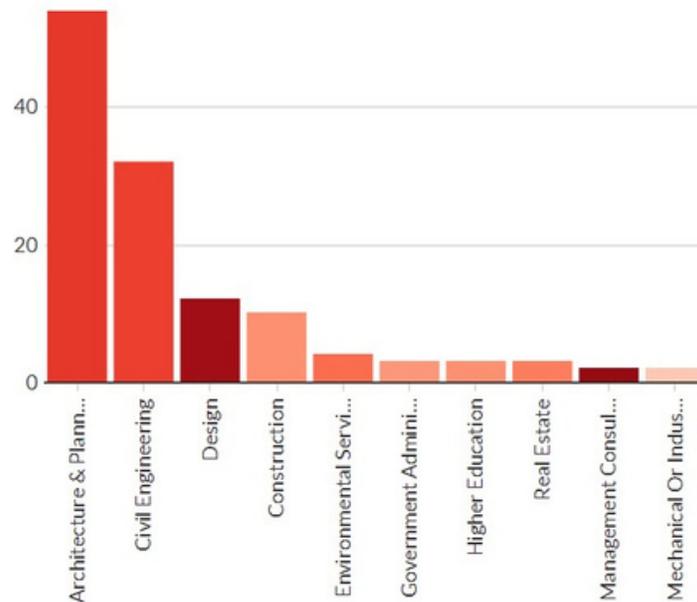
User Distribution by Profession



Industry Distribution

Explore the breakdown of firms by industry (*if available) on your leaderboard and cross-examine average intent scores to identify which industries are most likely to convert.

Firm Distribution by Industry



**Industry data is used when available for each firm*

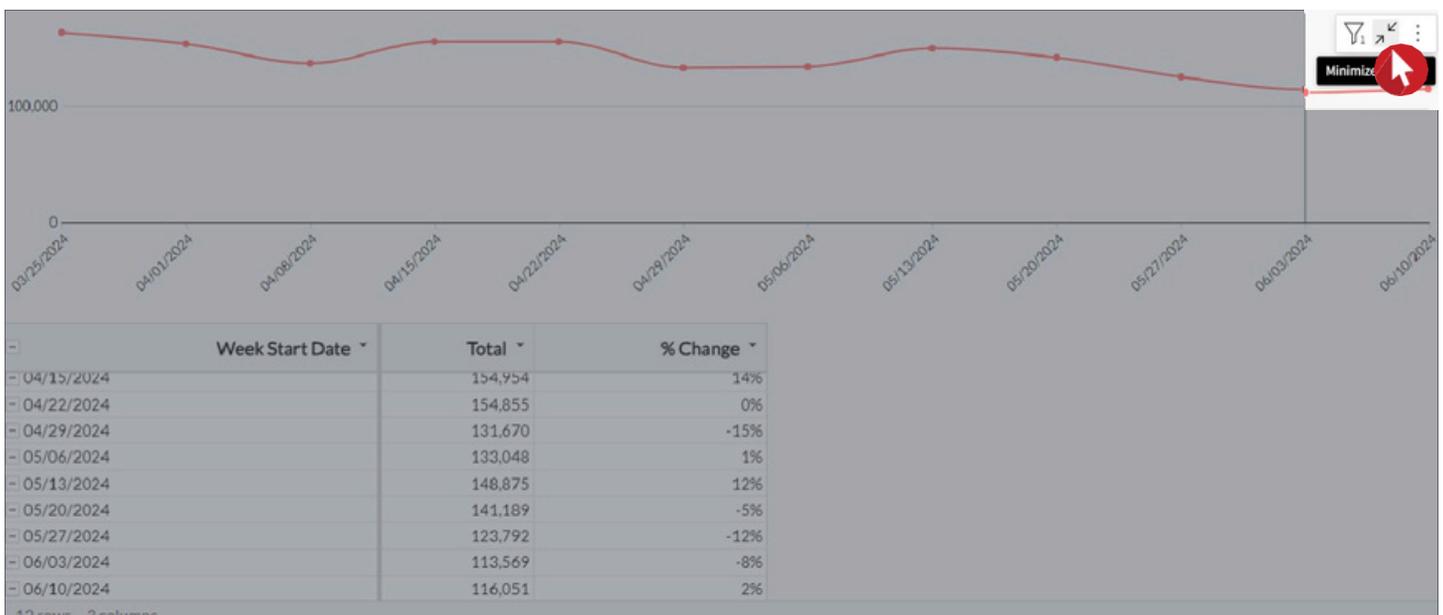
Advanced Features and Utility

Maximizing Dashboard Elements

- Each element on your Performance Summary and Design Firm Leaderboard can be maximized by selecting the “Maximize Element” icon  on the topright of the element. This function expands the element to fill the entire page for focused viewing.

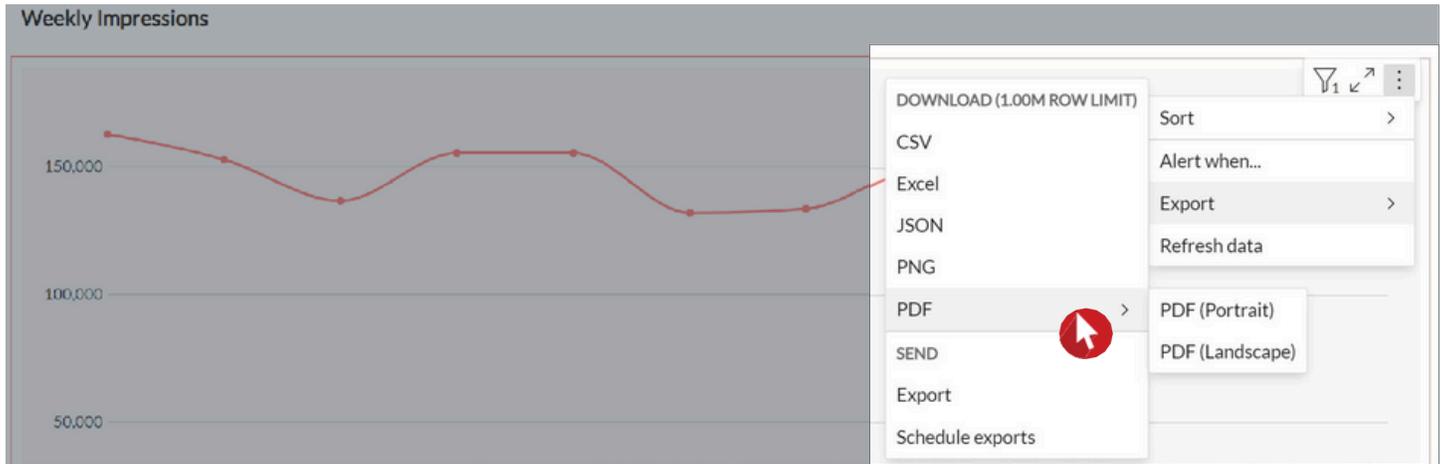


- When expanded, data used to create visualizations is presented in table format. To return to the full dashboard view select the “Minimize Element” icon  on the top right of the maximized element view.



Exporting Data

- Export specific elements into PDF, Excel, CSV, or JSON formats at your convenience while exploring the dashboards in the client portal.
- To export, simply hover over an element and select the more options icon  on the top right. From the drop-down, select 'Export' followed by the format of your choice.
 - Specific formats will download directly to your device.
 - “Send” options allow you to send content directly to end users via email, an endpoint through webhooks, or cloud storage with a specific storage integration. You may also [schedule exports](#) (see page 17).



Scheduling Exports

- **Schedule exports** and email them to stakeholders or send them to specific destinations via webhooks and cloud storage integrations. Leverage [bookmarks](#) in schedule exports and share the data that matters.
- Select specific elements, entire pages, or the entire workbook as **attachments** to suit specific team needs.
- Set export **frequency** (i.e. daily, weekly, monthly, or custom).

The screenshot shows the 'Schedule Exports' dialog box with the following configuration:

- Export via email:** Includes icons for email, share, and a plus sign.
- Recipient:** analytics@caddetails.com, natalia@caddetails.com
- Subject:** Weekly Design Firm Leaderboard & Performance Over Time Updates
- Message:** Weekly update for CADdetails Analytics showing changes in engaged firms and performance.
- Attachments:**
 - Design Firm Leaderboard (PDF, Landscape)
 - Performance Summary - Performance Over Time (PDF, Portrait)
 - Design Firm Leaderboard - Leaderboard (Excel)
- Frequency:** Weekly, at 09:00 AM on Monday.
- Buttons:** Delete, Cancel, Create

- Under “More Options” in the dialog box you can select **custom control values** (aka dashboard filter options) and **combine attachments** into single PDF, Excel, or ZIP files for tailored data delivery/sharing within your teams.

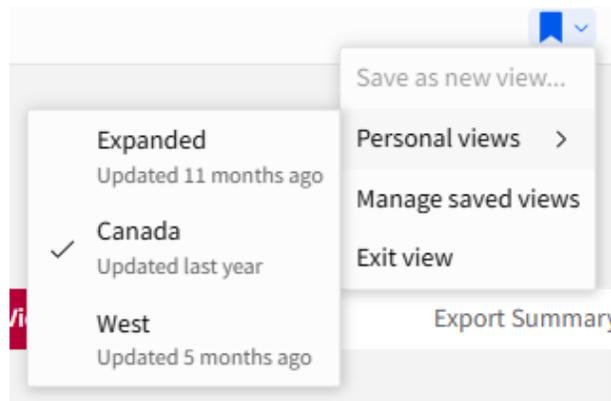
The screenshot shows the 'Schedule Exports' dialog box with the following configuration:

- More Options:**
 - Combine attachments ⓘ
 - Send as .zip file
 - Customize control values
- Controls:** Search to add control
- Select-KPI:** Downloads
- Date-Range:** Last month (05/2024)
- State-Province:** (2) Texas, Florida
- Industry:** (2) Architecture & Planning, Government Administration
- Profession:** Architect
- Buttons:** Delete, Cancel, Create

- Scheduled exports can be deleted at any time using the “Delete” functionality on the bottom left of the Schedule Exports dialog box.

Custom Views (Bookmarks)

- Use the bookmark icon  on the top right of the dashboards to save custom views with your preferred filter options. This is convenient for specific use cases that align with your business reporting needs.
- Custom Views are specific to your login credentials, enabling individual users to tailor their analytics experience.
- Save time on filter manipulation by setting custom view bookmarks that preserve the filter variations that are important to you.
 - Examples: Monthly and Annual Performance Trends
 - Examples: East, Central, and West region-focused Leaderboard
- Specific custom views can be assigned to scheduled exports, ensuring that the most relevant data is sent to the right users or destinations.
- You may use a Custom View to preserve an expanded view of the Leaderboard. This can be useful if you want to schedule an export that includes all of the firm and user-level data as an Excel file.



Manage Custom Views

- Set default views for easy access during subsequent visits.
- Delete and update names of custom views.
- Reset dashboards to default settings.

