# Salesforce x Measurement Protocol Integration Workshop

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## Prerequisites:

a) Salesforce Developer Account  (create one via: https://developer.salesforce.com/signup )
b) Google Analytics Account
c) Salesforce basic knowledge (e.g. How to create a custom field, how to create process builder)
d) HTML/JavaScript basic knowledge (e.g create html form, create simple javascript code to modify input field values )

## App Installation

a) Install the Salesforce x Measurement Protocol App:

Version 1.5: https://login.salesforce.com/packaging/installPackage.apexp?p0=04t28000000Y32P

## Approve Third-Party Access

×

This package may send or receive data from third-party websites. Make sure you trust these websites.  What if you are unsure?

| Website | SSL Encrypted |
|---|---|
| www.google-analytics.com | ☑ |

☑ Yes, grant access to these third-party web sites

Continue    Cancel

Name        Publisher        Version Name        Version Number

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## Install mpapp
By ForceAdm

ℹ **Installation Complete!**

Done

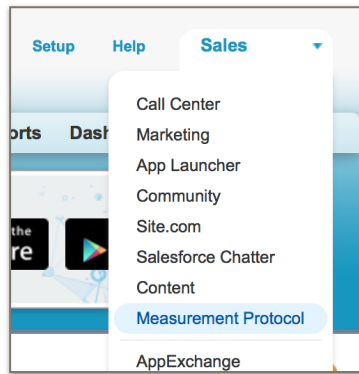| App Name | Publisher | Version Name | Version Number |
|---|---|---|---|
| mpapp | ForceAdm | 1.5 | 1.5 |

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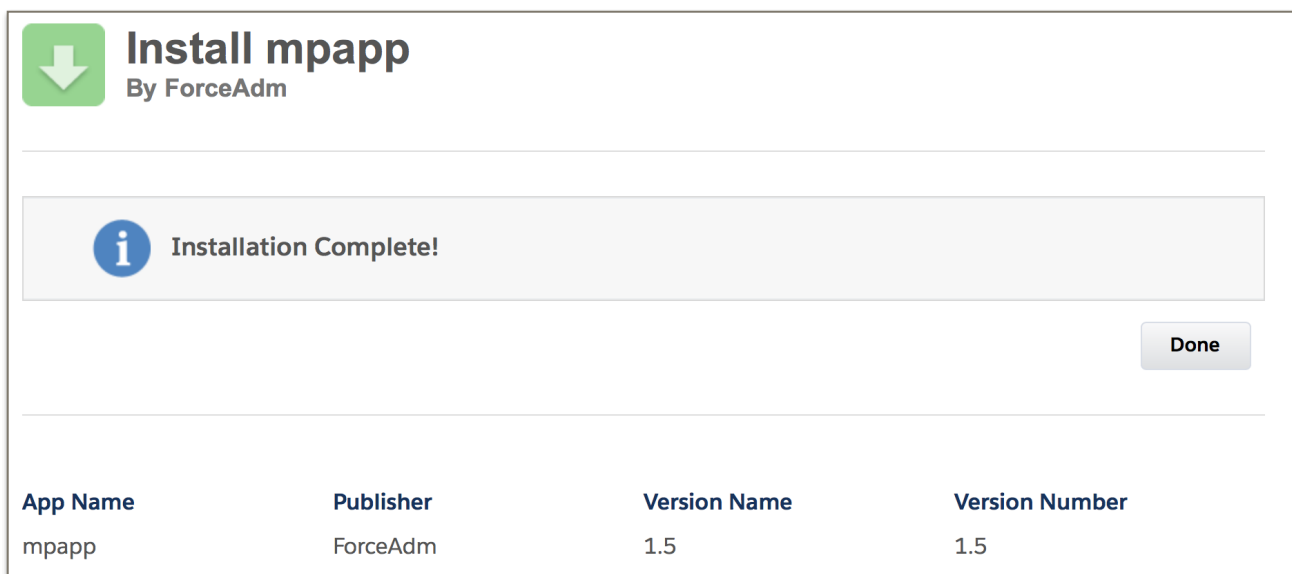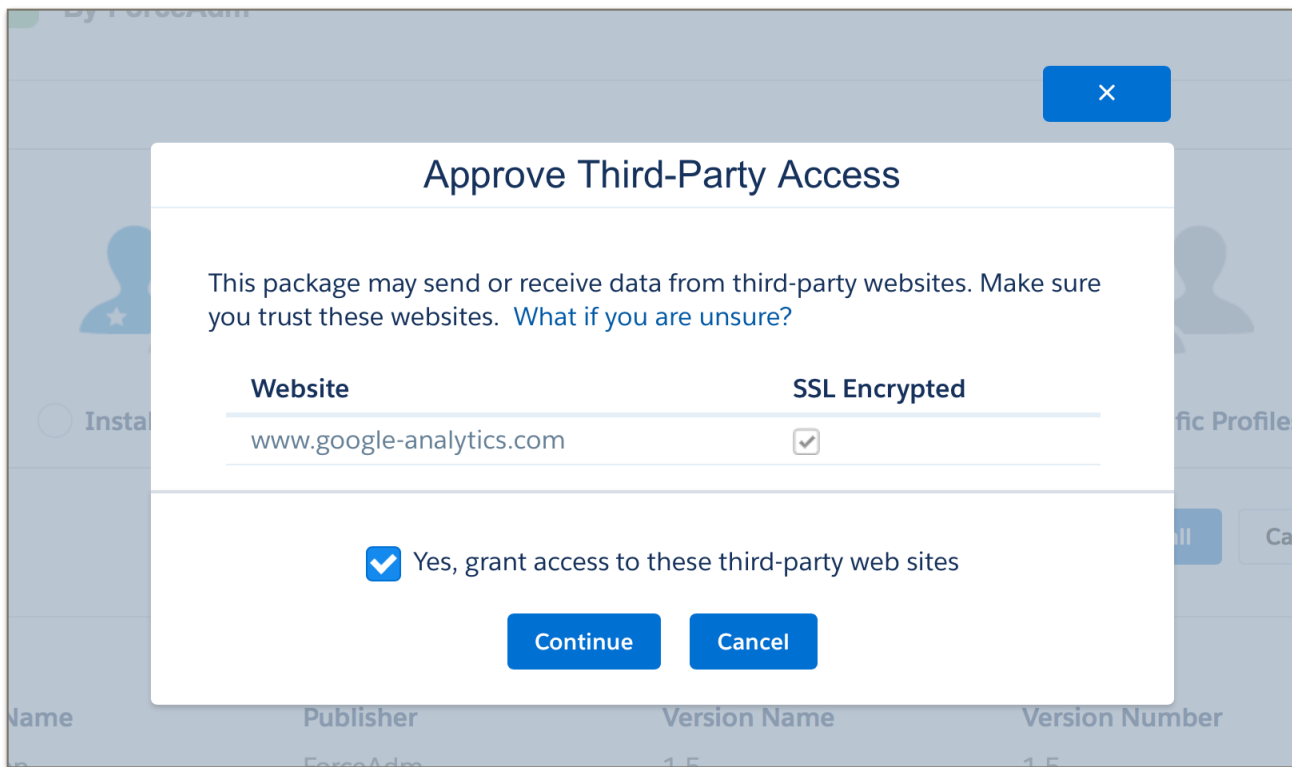
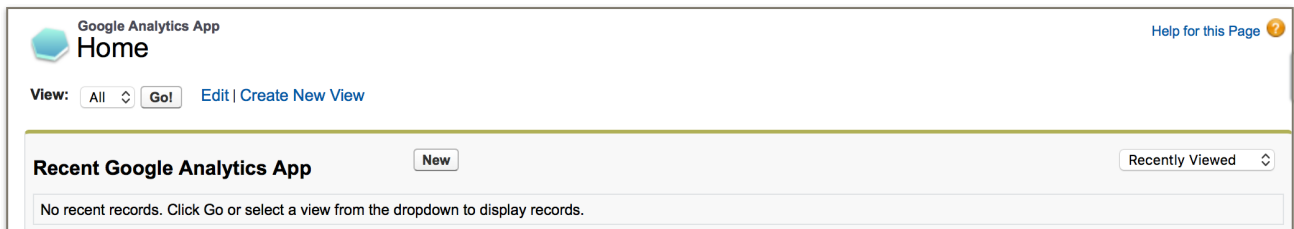# Using the App

**a)  Create a new field on Lead object:**

    Type: Text
    Label: GAUID
    Length: 255
    Name: GAUID

**b)  After the installation is completed, select the "Measurement Protocol" application on top right  of the page.**
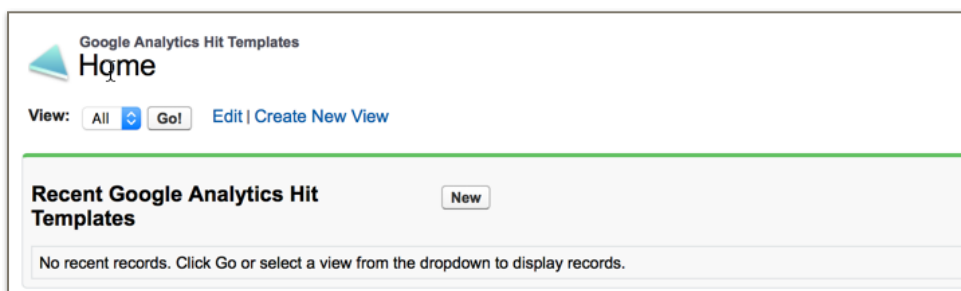
**c) Go to the "Google Analytics App" tab, click on "New" button.**



Inform a name that identify your website, your Google Analytics Tracking Id and click "Save":



**d) Go to the "Google Analytics Hit Template" tab, click on New button.**

Enter the name of your template, the API Name of the Object that the hit will be populated, and the Hit Type that will be sent to Google Measurement Protocol:



**e) After Saving the template, Click on "Setup Field Mapping" button:**



**f) In the Field Mapping Page, we will add the following Parameters**

| Hit Name | Hit Parameter | Salesforce Field | Default Value |
|---|---|---|---|
| Client Id | cid | GAUID__c | |
| Event Category | ec | Set Default Value | Prospect |
| Event Action | ea | Set Default Value | Lead Update |
| Event Label | el | Status | |

After adding all parameters, you should have something similar to this page:
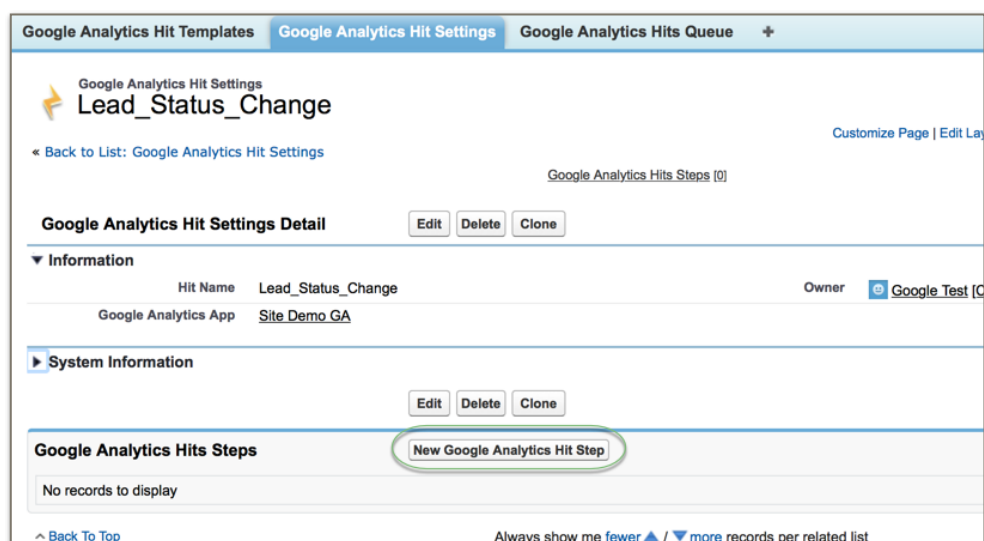
Click on "Save" button.

**g) Go "Google Analytics Hit Settings" tab, click on "New" button.**
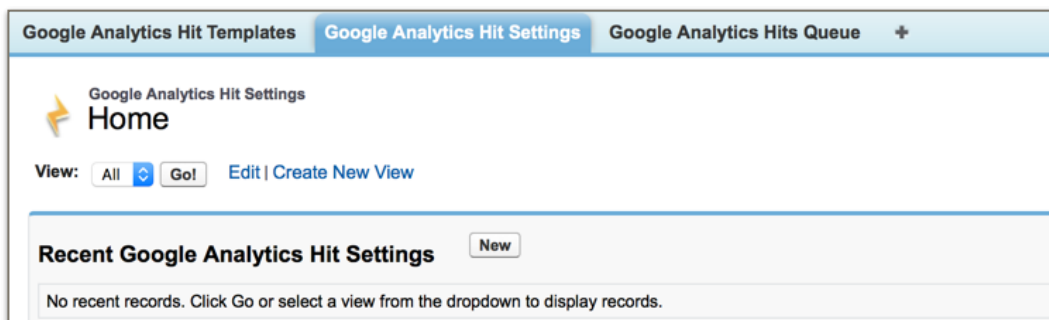


Inform a Hit Name, the Google Analytics App created in the first Step:

**Hit Name:** Lead_Status_Change *Copy this name to the clipboard, we will use it later.
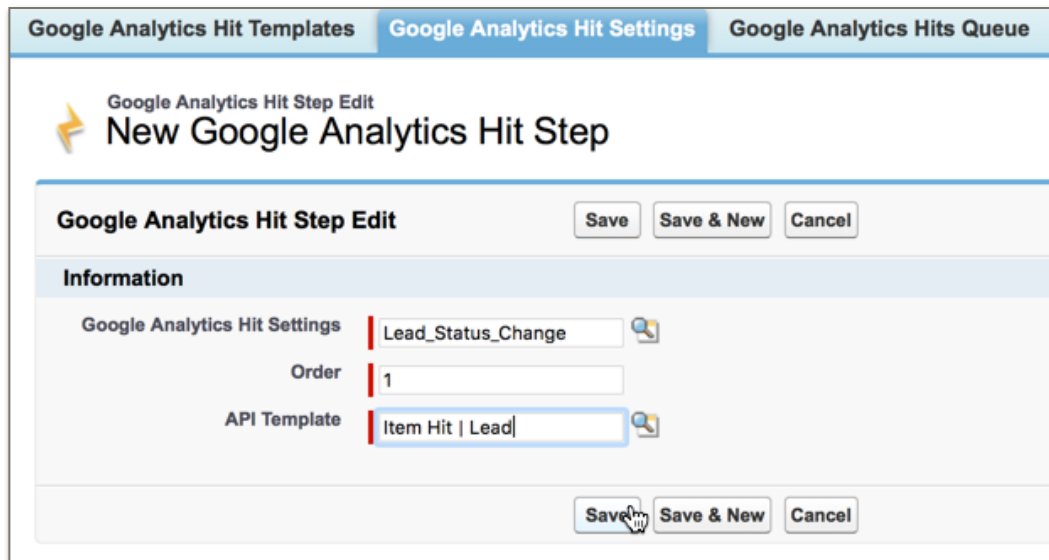**Google Analytics App:** Site Demo GA

After Saving, click on "New Google Analytics":

Enter the Order (as this Hit contains 1 step only, type "1") and the Hit Template we built in the previous step:

> **Google Analytics Hit Settings:** Lead_Status_Change
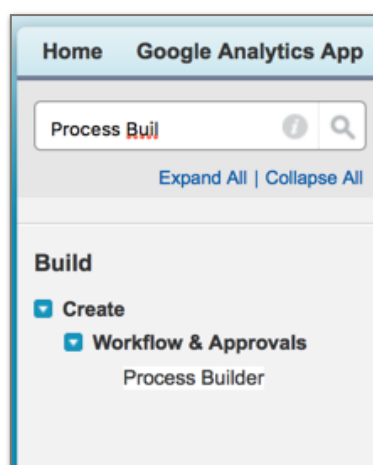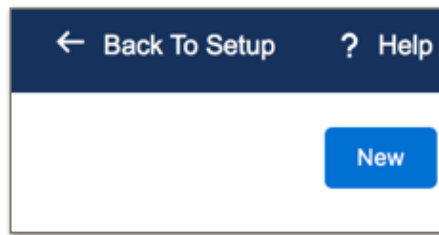> **Order:** 1
> **API Template:** Item Hit | Lead



**h) Once the steps above are completed. We will need to set up when the Hit will be sent. To do that we will use the power of "Process Builder"**

**Our Goal: Send a "event" hit to google analytics every time someone updates the status of a Lead.**

To setup a process builder, go to "Setup" > "Create" > "Workflows & Approvals" > "Process Builder":

On "My Processes" click on "New Button" on top-right of the page:
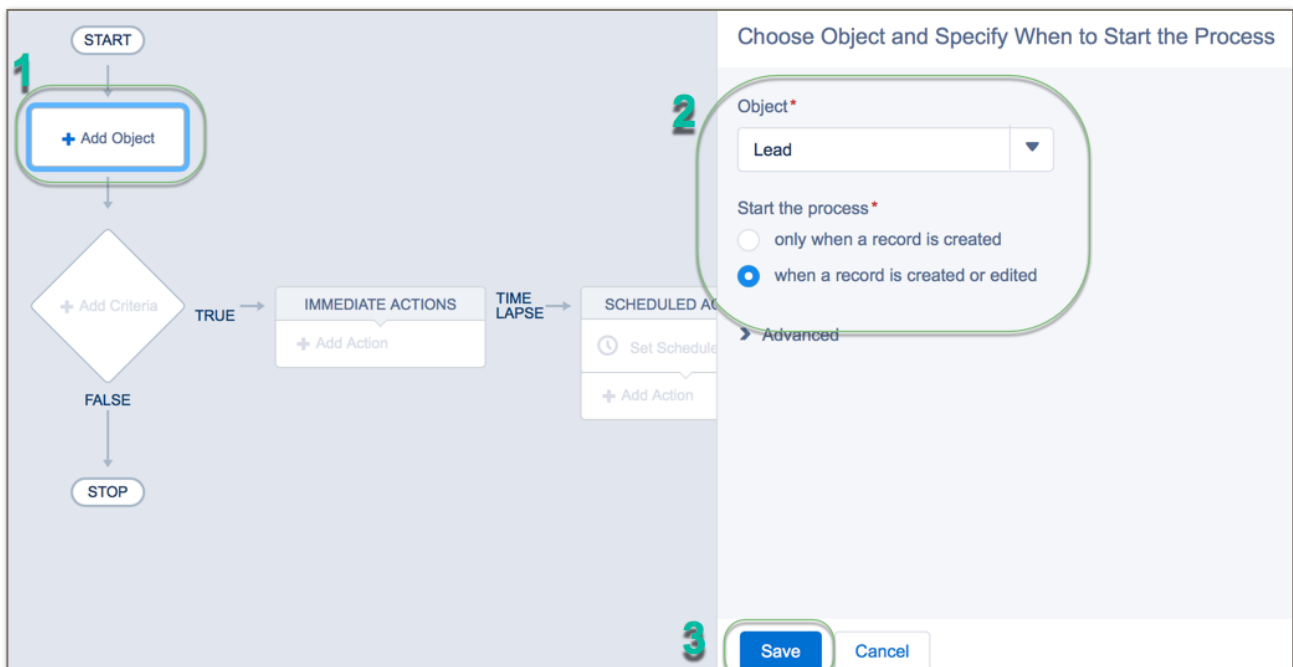


Enter the Process Name and click "Save":

In the next page, click on "Add Object" and enter to details below:

> **Object:** select "Lead"
> **Start the process:** "when a record is created or edited"



> **Save button.**

Click on "Add Criteria":

**Criteria Name:** Status changed?
**Criteria for Executing Actions:** Conditions are met
**Set Conditions:**

| Field | Operator | Type | Value |
|---|---|---|---|
| Status | Is changed | Boolean | TRUE |

**Conditions:** All of the conditions are met (AND)

**Save button**



Click on "Add Action":

**Action Type:** Create Record
**Action Name:** Enqueue Hit
**Record Type:** Google Analytics Hit Queue
**Set Field Values:**

| Field | Type | Value | |
|---|---|---|---|
| Google Analytics Hit Settings Name | String | Lead_Status_Change | *Need to be the exact same name as created in the Hit Settings Tab. |
| RecordId | Reference | Lead Id | |

**Save button**

START

Lead

Status changed? — TRUE → IMMEDIATE ACTIONS + Add Action → STOP

FALSE

+ Add Criteria — TRUE → IMMEDIATE ACTIONS + Add Action → STOP

FALSE

**2** Select and Define Action

Action Type*
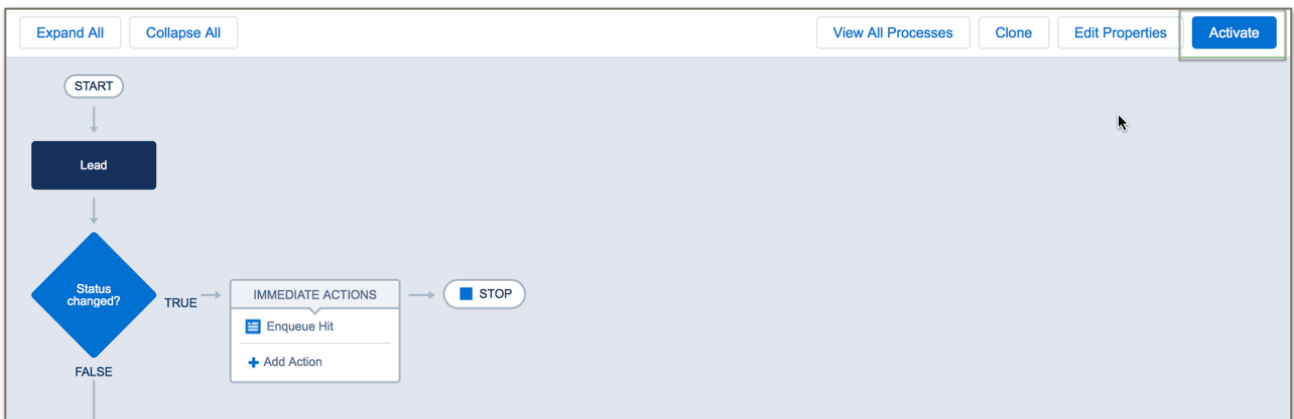Create a Record ▼

Action Name* ⓘ
Enqueue Hit

Record Type*
Google Analytics Hit Queue ▼

Set Field Values

| Field* | Type* | Value* |
|---|---|---|
| Google Analytics Hit Settings Name | String ▼ | Lead_Status_Change |
| RecordId | Reference ▼ | [Lead].Id |

+ Add Row

**3** Save   Cancel

**Done!! Now you just need to "Activate" your process, by clicking on "Activate" button on top right of the page.**

Expand All   Collapse All          View All Processes   Clone   Edit Properties   **Activate**

START

Lead

Status changed? — TRUE → IMMEDIATE ACTIONS | Enqueue Hit | + Add Action → STOP

FALSE

Now, every time a user update the status of a lead, the app will send a "event" hit to Google Analytics.

You can see all Hits sent to google Measurement Protocol by opening "Google Analytics Hit Queue" tab. Once the "Processed" flag is set to true, that means the Hit was successfully sent.

Google Analytics Hit Templates   Google Analytics Hit Settings   **Google Analytics Hits Queue**   +

Google Analytics Hit Queue
**GAQ-00001**
« Back to List: Leads

Edit Layout | Printable View | Hel

**Google Analytics Hit Queue Detail**   Edit   Delete   Clone

| | |
|---|---|
| Google Analytics Hit Queue Id | GAQ-00001 |
| RecordId | 00Q2800000MbhcAEAR |
| Google Analytics Hit Settings Name | Lead_Status_Change |
| Date | |
| Run in Batch | ☐ |

Processed ✓

▼ Log Details

Log   2016-08-28 08:08:50 | https://www.google-analytics.com/collect?v=1&t=event&tid=UA-37767416-1&cid=12222222.122222222&ec=Prospect&ea=Lead+Update&el=Status&ev=Working+-+Contacted |

Created By   Google Test, 28/08/2016 6:08 PM        Last Modified By   Google Test, 28/08/2016 6:08 PM

Edit   Delete   Clone