

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=04t280000000Y32P>




Install mpapp


By ForceAdm



☐ Install for Admins Only



☒ Install for All Users

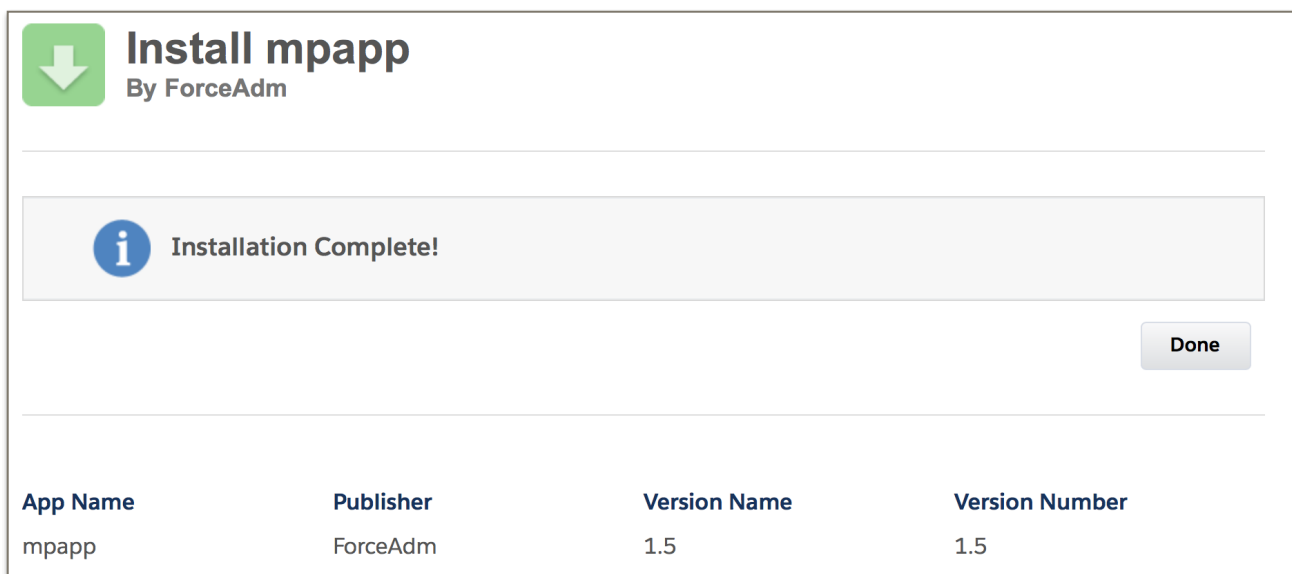
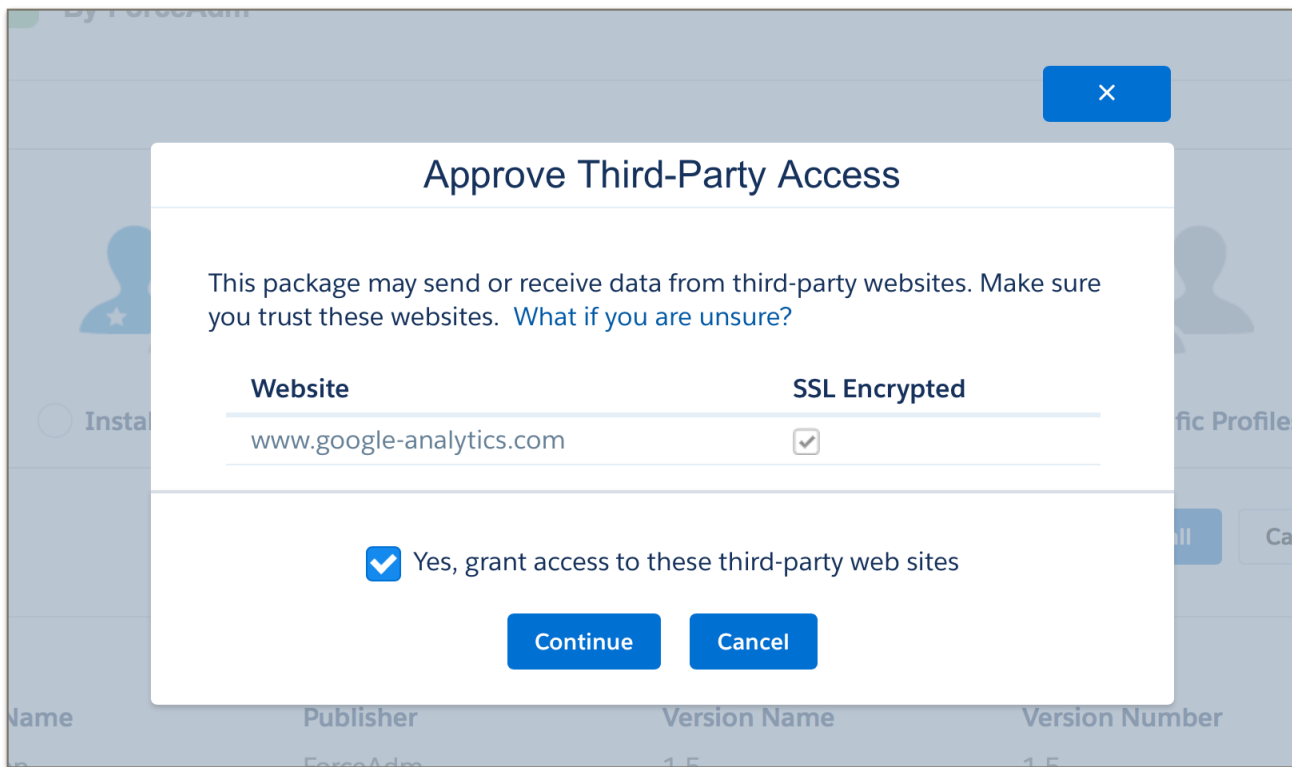


☐ Install for Specific Profiles...

InstallCancel

App Name	Publisher	Version Name	Version Number
mpapp	ForceAdm	1.5	1.5

[Additional Details](#)[View Components](#)

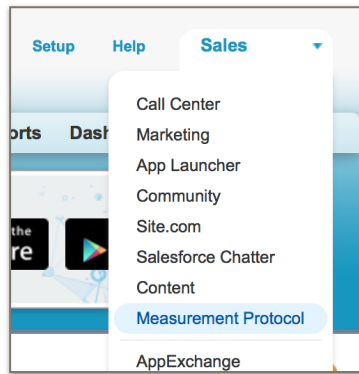


Using the App

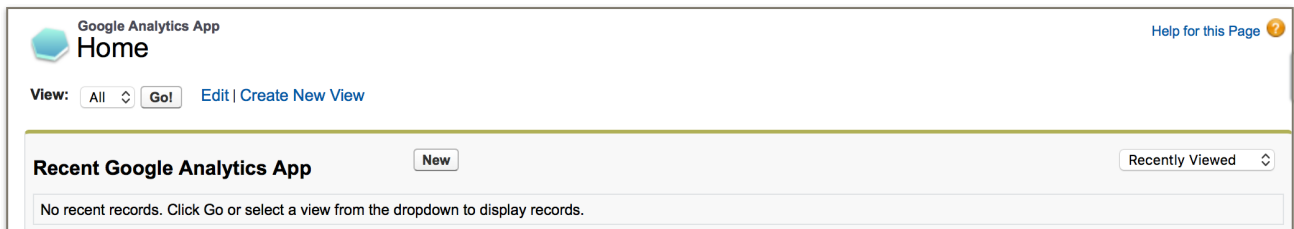
a) Create a new field on Lead object:

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.



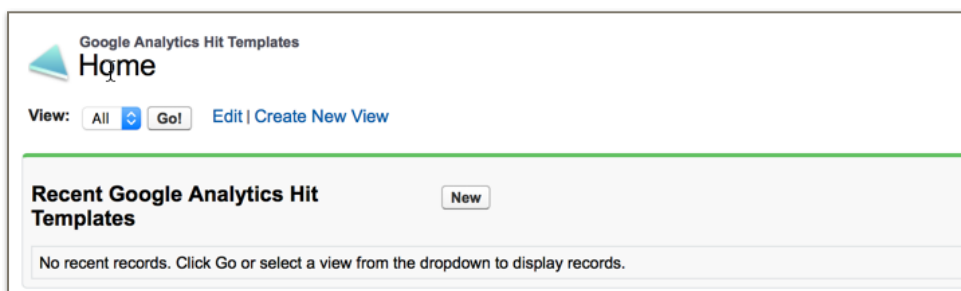
c) Go to the “Google Analytics App” tab, click on “New” button.



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

A screenshot of the 'Google Analytics App Edit' form. The form is titled 'New Google Analytics App'. It has a header with the Google Analytics logo and the word 'Home'. Below the header, there's a 'View:' section with a dropdown menu set to 'All' and a 'Go!' button. To the right of 'Go!' are links for 'Edit' and 'Create New View'. The main content area is titled 'Recent Google Analytics App' and has a 'New' button. Below this, there's a message: 'No recent records. Click Go or select a view from the dropdown to display records.'

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:

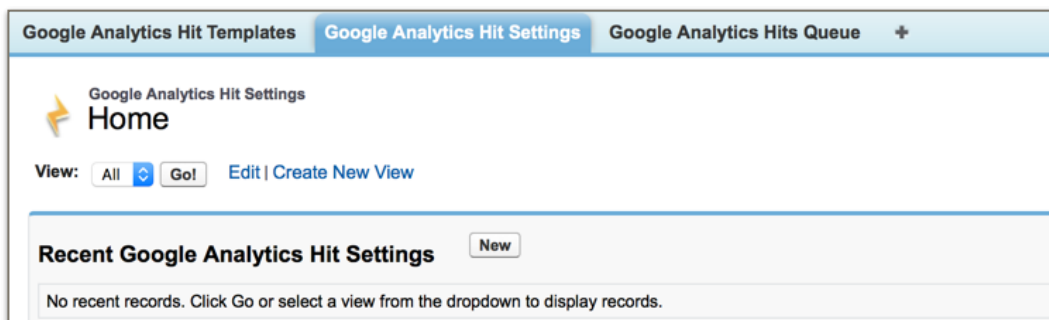
f) In the Field Mapping Page, we will add the following Parameters

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:

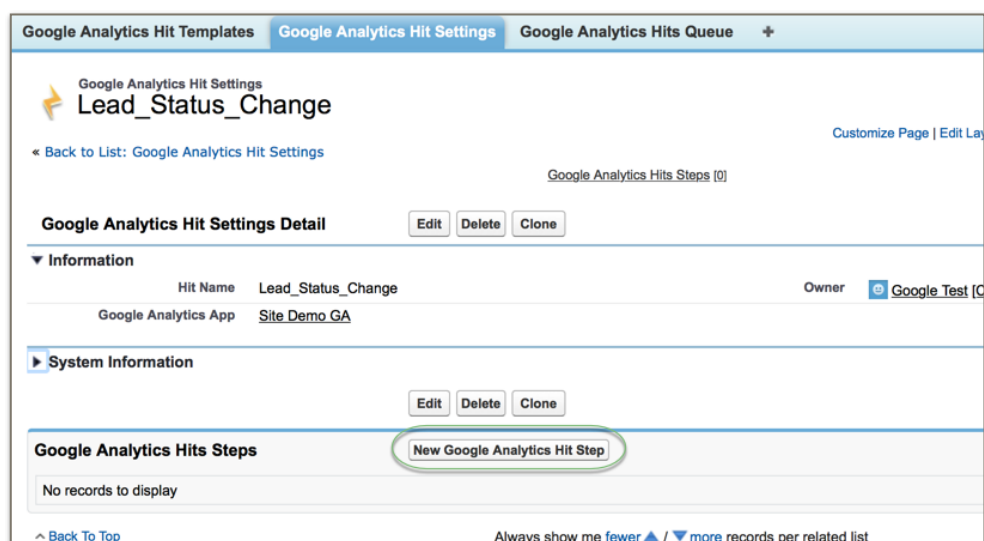
Click on “Save” button.

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

This screenshot shows the 'New Google Analytics Hit Settings' form. The top navigation bar has 'Google Analytics Hit Settings' selected. The page title is 'New Google Analytics Hit Settings'. Below the title, there's a 'Google Analytics Hit Settings Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Information' section contains two input fields: 'Hit Name' with the value 'Lead_Status_Change' and 'Google Analytics App' with the value 'Site Demo GA'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

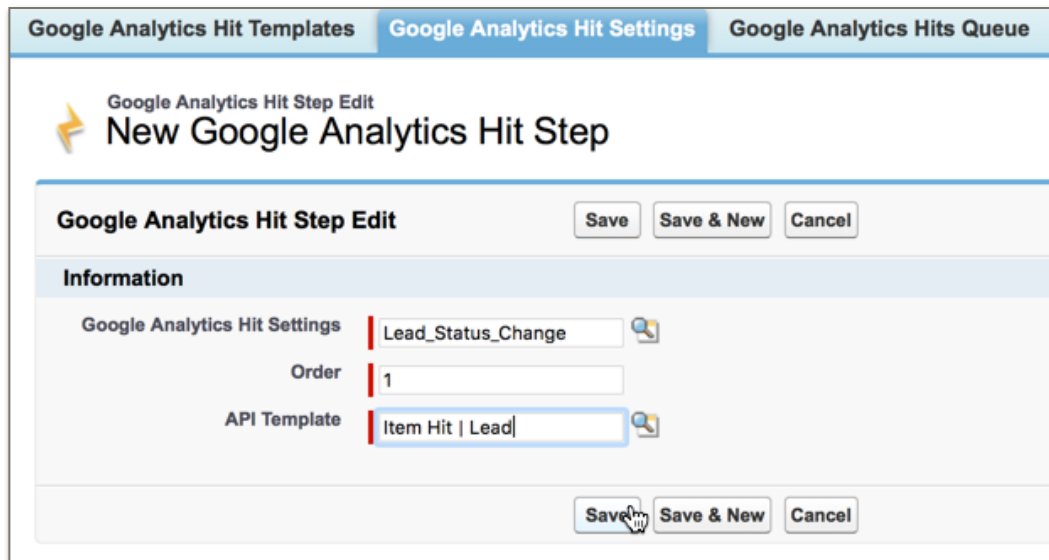
After Saving, click on “New Google Analytics”:

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

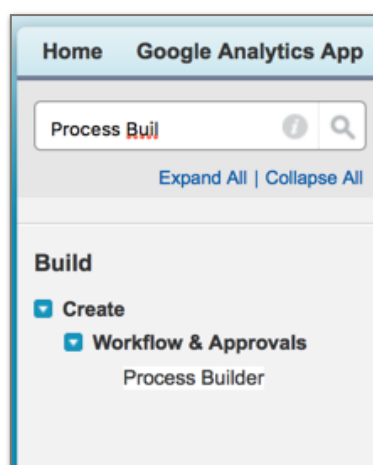


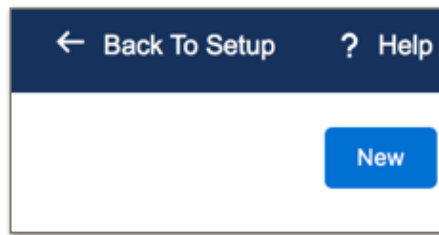
The screenshot shows the 'Google Analytics Hit Step Edit' form. At the top, there are three tabs: 'Google Analytics Hit Templates', 'Google Analytics Hit Settings' (which is active), and 'Google Analytics Hits Queue'. Below the tabs, the form title is 'New Google Analytics Hit Step'. The form has a header bar with 'Google Analytics Hit Step Edit' and three buttons: 'Save', 'Save & New', and 'Cancel'. The main section is titled 'Information' and contains three fields: 'Google Analytics Hit Settings' with the value 'Lead_Status_Change', 'Order' with the value '1', and 'API Template' with the value 'Item Hit | Lead'. Each field has a search icon to its right. At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. A mouse cursor is hovering over the 'Save' button.

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:

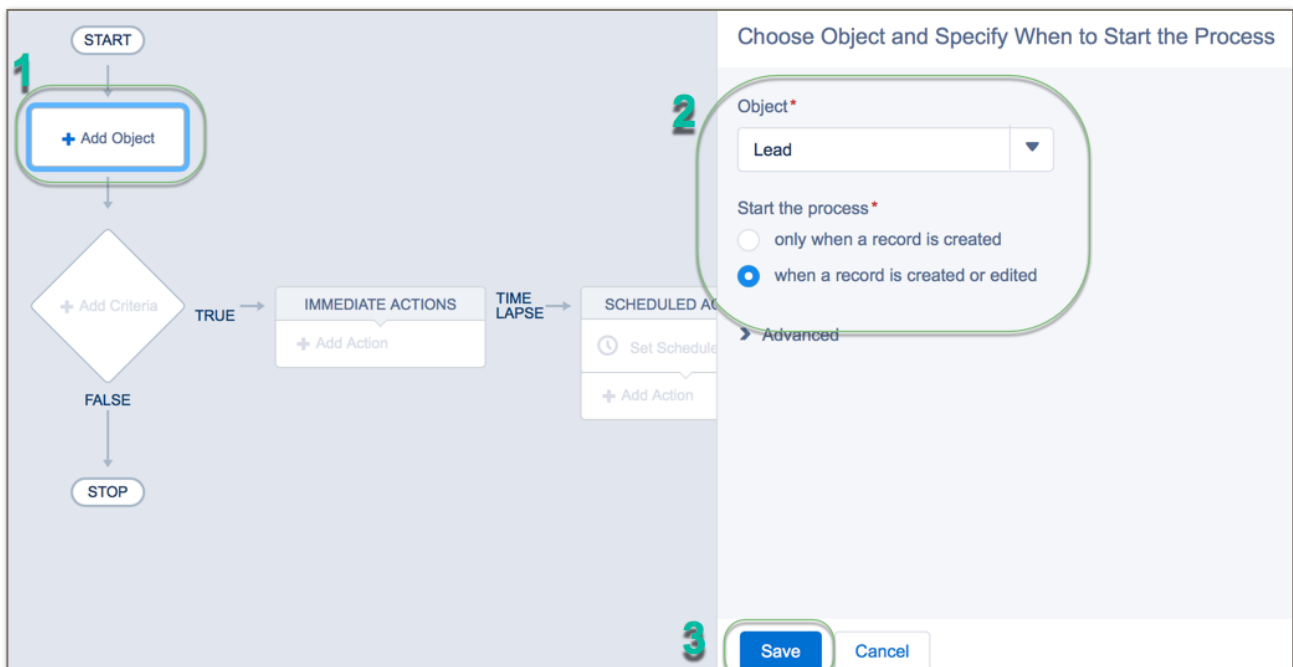
A form titled 'New Process'. It has two input fields: 'Process Name *' with the value 'Lead Status Update' and 'API Name *' with the value 'Lead_Status_Update'. Below these is a 'Description' field. At the bottom right are 'Cancel' and 'Save' buttons.

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

The screenshot shows a workflow editor with a decision diamond labeled '1' containing '+ Add Criteria'. The 'TRUE' path leads to 'IMMEDIATE ACTIONS' (containing '+ Add Action') and then to a 'STOP' node. The 'FALSE' path leads directly to a 'STOP' node. A panel on the right, titled 'Define Criteria for this Action Group', is open. It shows 'Criteria for Executing Actions' with 'Conditions are met' selected. Under 'Set Conditions', a table is populated with one row: Field '[Lead].Status', Operator 'Is changed', Type 'Boolean', and Value 'True'. Below this, 'Conditions' are set to 'All of the conditions are met (AND)'. At the bottom of the panel are 'Save' and 'Cancel' buttons. The workflow canvas has buttons for 'Expand All', 'Collapse All', 'View All Processes', 'Clone', 'Edit Properties', and 'Activate'.

Click on “Add Action”:

Action Type: Create Record

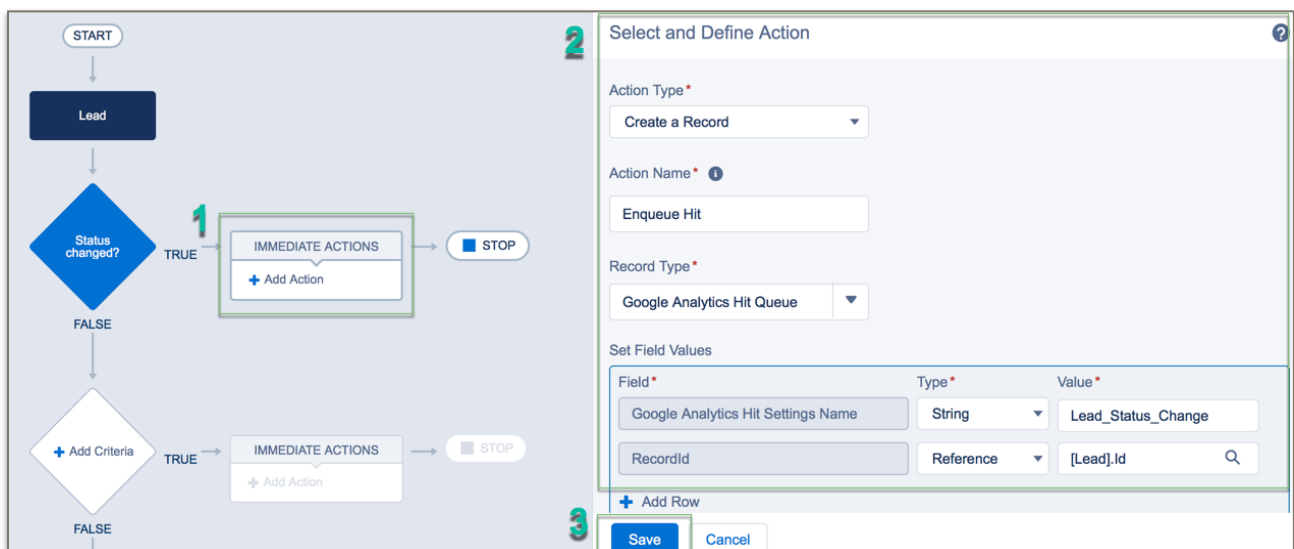
Action Name: Enqueue Hit

Record Type: Google Analytics Hit Queue

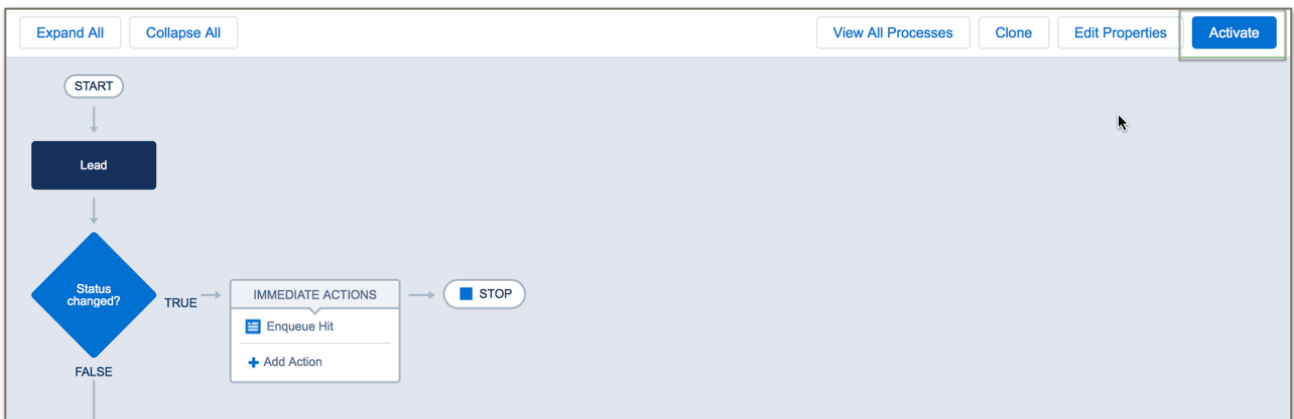
Set Field Values:

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



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



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.

The screenshot shows the 'Google Analytics Hits Queue' interface. At the top, there are tabs for 'Google Analytics Hit Templates', 'Google Analytics Hit Settings', and 'Google Analytics Hits Queue'. Below the tabs, there's a header for 'Google Analytics Hit Queue' with the ID 'GAQ-00001' and a 'Back to List: Leads' link. On the right, there are links for 'Edit Layout', 'Printable View', and 'Help'. Below the header, there's a table with columns for 'Google Analytics Hit Queue Id', 'RecordId', 'Google Analytics Hit Settings Name', 'Date', and 'Run in Batch'. The first row shows 'GAQ-00001', '00Q2800000MbhcAEAR', 'Lead_Status_Change', and a 'Processed' checkbox that is checked. Below the table, there's a 'Log Details' section with a log entry: 'Log 2016-08-28 08:08:50 | https://www.google-analytics.com/collect?v=1&t=event&tid=UA-37767416-1&cid=12222222.12222222&ec=Prospect&ea=Lead+Update&el=Status&ev=Working+--Contacted |'. At the bottom, there are fields for 'Created By' (Google Test, 28/08/2016 6:08 PM) and 'Last Modified By' (Google Test, 28/08/2016 6:08 PM), along with 'Edit', 'Delete', and 'Clone' buttons.