



Web site Tracking

Setup guide to enable & utilize the website tracking feature.

bhoobalan.palanivelu@agiliztech.com



AgilizTech



Contents

PRE-REQUISITE FOR TRACKING WEBSITE.....	2
ACTION ITEM.....	2
WEBSITE EVENT TRACKING	3
TRACKING SETUP	3
a) Specify website addresses for tracking in the [Tracking domains] lookup.....	3
b) Enable tracking.	3
c) Set up the list of Tracked events	4

PRE-REQUISITE FOR TRACKING WEBSITE

- 1.The website event tracking feature should be enabled prior configuration.
- 2.You need to send an email to Creatio Support about the information on website and environment.
 - a) Website address to be tracked
 - b) Environment details where website actions must be collected
- 3.Creatio Support will link the items and provide the required System Setting values and an API Key.

ACTION ITEM

1. Tracking code is created once the web tacking feature is enabled, and configuration is done.
 2. SBL team must update the tracking code in the target HTML pages of website to track the site.
 3. AgilizTech has supported to enable the website tracking feature in SBL development environment, coordinating with Creatio Support.
- Note:** For further environments SBL team could reach Creatio Support for System Setting and API key.

Please find the complete setup details described in this document.

WEBSITE EVENT TRACKING

Use the [Website events] detail on the [History] tab of the lead page to view customer activities on your website. To use the website tracking function, you need to perform the tracking setup first.


TRACKING SETUP

To be able to use website event tracking, you need to configure a few settings on your website and in Creatio:

1. Specify the domain names of the tracked websites in Creatio.
2. Enable tracking for the on-site deployed CRM site.
3. Set up the list of website events that must be tracked.
4. Embed a unique tracking code in the source code of your website pages.

a) Specify website addresses for tracking in the [Tracking domains] lookup.

To set up:

1. Open the system designer, for example, by clicking the  button at the top right corner of the application. In the system designer, click the [Lookups] link.
2. Open the contents of the [Tracking domains] lookup.
3. Click the [Add] button and enter your web site's domain address, i.e., "creatio.com ". Apply the changes.

NOTE: Domain addresses are added to the lookup without the protocol prefix (http://).

b) Enable tracking.

Below are the required System Setting value, kindly configure provided System Setting values:

Source SBL Creatio Site: <http://192.168.100.208:8000/Login/NuiLogin.aspx>

IdentityServerUrl: <https://accounts.creatio.com>

DefaultExternalAccessClientId: support.bpmonline

IdentityServerClientId: 201911212461

IdentityServerClientSecret:

aa3Nt+QA;:HU}MSQa-t8?]yE*bYnW#&d8DWW\$4AVa6[seEh|}qw>O^y|=p6THl@)

BpmAuthKey: 6iNghfbh8m

EventTrackingWebAppUrl:

<http://192.168.100.208:8000/0/ServiceModel/EventTrackingService.svc/SaveEventTrackingData>

please make sure that below endpoint,

`http://192.168.100.208: 8000/0/ServiceModel/EventTrackingService.svc/SaveEventTrackingData` is accessible from external IPs, otherwise, you will not be able to set up the tracking.

Open the system designer and click the [Website event tracking] link of the [Import and integration] block.

1.Click the [Set up tracking] button. Enter the API key provided below.

ApiKey: JF1MRHW0GDggc0ZzbSD8lh46HqRM1uQn6wwCTU1u

2.Click the [Set up tracking] button.


The system will start tracking website events for all domains specified in the [Tracking domains] lookup. Set up the list of tracked events and embed the tracking code in the source code of your website pages to complete the setup.

c) Set up the list of Tracked events

You can track almost any activity on your website. Tracked website events include adding products to cart, successful authentication, viewing a product page, searches, and banner clicks. The website activity information stored on the lead and contact pages depends on the list of tracked events. There are two types of events:

- Page link clicks, such as opening a product page.
- Page item clicks, such as clicking the “Add to cart” button. The system identifies the item by its class, unique ID, and jQuery selector.

a) Setup Tracking of Link Clicks

1.Open the System Designer, for example, by clicking the  button at the top right corner of the Creatio page. Click the [Website event tracking] in the [Import and integration] block.

2.Click the [New website event] button.

3.On the opened page:

- a. Enter the website event name.
- b. Select the “Page visit” website event type.
- c. Select the [Active] checkbox to enable tracking of the event.

Note: Website events that you do not need to track any more (such as events for outdated pages) cannot be deleted because they are referenced in the website event history. Clear the [Active] checkbox to disable tracking for an outdated event.

d. Enter the URL of the page to track on the [Event tracking setup] tab e.g., <https://www.creatio.com> or <https://www.creatio.com/products>.

4. Save the page. Add the remaining pages in the same manner. As a result, the event history for all pages with the [Active] checkbox selected will be saved for leads and corresponding contacts.

NOTE: A separate event must be set up for each website page.

b) Set up of tracking clicks.

You can track clicks on any page item on your websites. Website events for page item clicks usually imply clicking buttons, such as social media sharing options or adding products to cart. You can set up website events for page item clicks in three ways:

- By item class, for tracking the same event for all page items of the same class.
- By unique ID of a page item. In this case, you need to set up separate event tracking for each tracked page item.
- By jQuery-selector. Use this option to track the same event for all page items with the same style. The website developer usually performs this setup.

c) Set up of tracking page items by Unique ID.

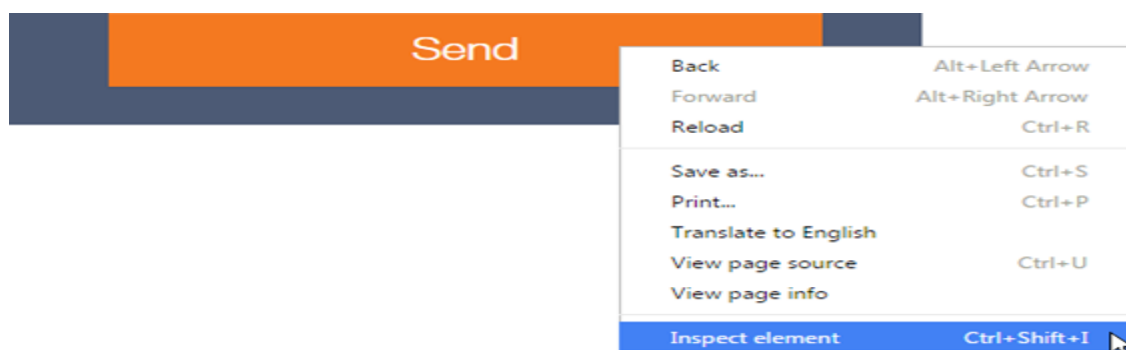
Use the tracking by unique ID option if the website layout uses unique IDs. To do this:

1. Use your web browser function to view the source code of the item that needs to be tracked on your website (Fig. 1).

Note

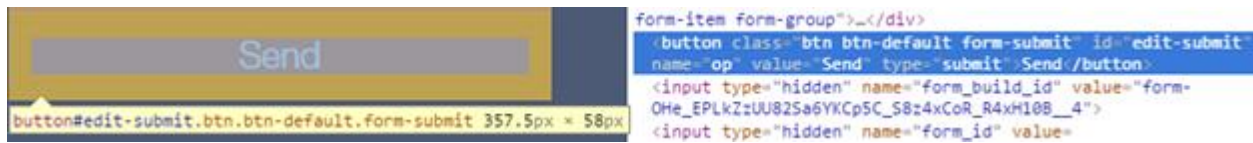
Below is setup example for the Chrome browser. The procedure for viewing the source code depends on the web browser used.

Fig. 1 Viewing source code example



2. Select the item's unique ID in the source HTML code and copy it to your clipboard. For example, the item selected on Fig. 2 is the "edit-submit" item.

Fig. 2 Example of page item ID



3. Open the system designer, for example, by clicking the button at the top right corner of the application. Click the [Website event tracking] in the [Import and integration] block.

4. Click the [New website event] button.

5. On the opened page:

- a. Enter the event name.
- b. Select the "Element click" event type.
- c. Select the [Active] checkbox to enable tracking of the event.

Note

Website events that you do not need to track any more (such as events for outdated pages) cannot be deleted, because they are referenced in the website event history. Clear the [Active] checkbox to disable tracking for an outdated event.

- d. Select the "By Id" option in the [How to identify elements] field.
- e. Paste the page item ID from clipboard in the [Element identifier] field.

Save the page. Creatio will start tracking clicks on this page item as a result. You can view tracking results on the [Website events] detail of the corresponding leads and contacts.

d) Embed Tracking code in your website

To be able to use the website activity tracking function, you need to embed the tracking code in the source code of each page on your website.

To set up tracking code:

1. Open the system designer, for example, by clicking the button at the top right corner of the application. Click the [Website event tracking] in the [Import and integration] block.
2. Click the [Get tracking code] button. A window will open, containing the tracking code.
3. Copy the tracking code and paste it in the source HTML code of each page on your website. You can paste the code anywhere before the closing tag ("`</body>`") at the end of the page. **If you do not insert the code in all the website pages, Creatio will not be able to collect all the data about the potential customers redirected to your website.**