optimove

Implementing OptiTrack Website Visitor Tracking

June 2015

Overview

OptiTrack is an Optimove feature that captures website browsing activity data for *individual visitors* and links this data with customer records for improved customer segmentation and personalized marketing. For businesses that do not already capture and store granular website tracking data for individual customers in their data warehouses, adding this extra data dimension can provide valuable additional insight into customer behavior.

It is important to note that most website tracking systems (e.g., Google Analytics) record *anonymous* website activity for the purposes of understanding how visitors use the website in general. These systems do not attempt to record the website activity for *individual visitors*. Not only does OptiTrack record the website activity of individual visitors, it also links these records to each particular customer's record within your data warehouse. The two main benefits of incorporating this data into customer records are:

1. Marketers have access to even more sophisticated ways of segmenting customers and personalizing marketing campaigns for maximum response.
2. Customer activity on the website can be used to activate realtime campaign triggers that can deliver super-personalized offers based on combinations of behavior patterns, recent transactions and current website activity.

This document is aimed at the technical person responsible for adding OptiTrack to his/her company's website.

Adding OptiTrack to Your Website

In order to add OptiTrack to your website, you will need to:

1. Add the OptiTrack JavaScript tag in the relevant locations in your website.
2. Add a JavaScript call to link the visitor to a customer ID in the data warehouse, upon user registration or login.
3. Add an OptiTrack JavaScript call to individual webpage events (not always required).

Detailed instructions regarding each of these steps are contained in the following sections.

1. Add the OptiTrack Tag to Your Website

In order to use OptiTrack, a bit of JavaScript code (known as a "tag") must be added to every page in your website (or, every page you wish to track). There are different ways to do this, depending on whether you are using a website tag management system (such as Google Tag Manager) or not.

When Not Using a Tag Manager

Without a tag manager, you need to add manually add the OptiTrack tag to your website HTML code on each particular page you want to track, just before the closing </body> tag. The easiest way to do this is to add the tag to all relevant master pages or template files used to generate all the pages you want to track. Alternatively, you can manually add it to the HTML code of each individual page.

The actual tag code can be found at the end of this document – remember to customize the highlighted values indicated there.

When Using Google Tag Manager

These instructions assume basic familiarity with using Google Tag Manager (for more information, refer to Google's documentation). If using a different tag manager, refer to the relevant documentation for adding a custom HTML tag.

1. Click New and then select Tag to open the Create New Tag page.
2. Enter "OptiTrack" as the Tag Name.
3. Select "Custom HTML Tag" as the Tag Type.

4. Copy and paste the OptiTrack tag code into the HTML box (the code can be found at the end of this document – remember to customize the two highlighted values as described there).
5. Select the "Support document.write" checkbox.
6. Next to Firing Rules, click +Add.
7. Select "All pages" and click Save.
8. Click Save to save the tag.
9. Click Publish at the top-right of the main page.

2. Link Website Visitors to Registered Customer IDs

To make use of the website activity data inside Optimove, the website must also include code that links the website activity data of each visitor to the correct customer record in Optimove (assuming, of course, that the visitor exists in the customer database). This is how it works:

OptiTrack assigns each website visitor a unique identifier which is stored in a persistent browser cookie. This visitor ID is used to anonymously record all website pageviews and other actions. Once the visitor is identified on the site as a customer (typically, following login or registration), the website must provide the following tracking request with the customer ID, by adding the following line of code before any tracking call (i.e., trackPageView or any other tracking call):

```
_paq.push(['setUserId', 'CustomerID']);
```

See the sample code at the end of this document for reference.

3. Add Event Tracking Code

This step is only required for websites or Web applications in which important user activities occurs within the context of one (or a few) webpages, i.e., where client-side code handles the interactions as opposed to webpages with different URLs loading for different actions. This step can also optionally be implemented on standard multi-page websites/applications to track particular user actions of interest (clicking particular buttons, links, etc.).

To implement this, simply add the `_paq.push` call to every event that you wish to track, either inside an HTML tag's onclick value (as shown here) or anywhere within JavaScript code executing on the page:

```
onclick="javascript:_paq.push(['trackEvent','category','subcategory']);"
```

where *category* and *subcategory* represent the tracked event.

Examples

A fashion store might want to track the types of products the customer browsed:

```
<a href="#" onclick="javascript:_paq.push(['trackEvent','Product','Jeans']);">Jeans</a>
```

A game site might want to track which game areas the customer entered:

```
<a href="#" onclick="javascript:_paq.push(['trackEvent','StartGame','Bingo']);">Play Bingo</a>
```

Notes

Cookies

While the tracking cookie is defined as persistent, various factors may cause the cookie to not remain available across sessions. Therefore, the setUserId function should be called before every tracking call once a user has logged in or registered.

Because the anonymous visitor tracking requires the use of browser cookies, the OptiTrack solution is not presently available when cookies are disabled or otherwise unavailable.

Site Map

It may be helpful for the Optimove integration team to have a map of the website (or the pages that will be tracked) in advance. If necessary, the Optimove team can generate this site map for you.

The OptiTrack Tag

The following JavaScript code must be included within the HTML of every page to be tracked (just before the closing </body> tag), or via your tag manager.

The values for *your_site_ID* and *your_site_subdomain* will be provided to you by Optimove and must be inserted in the highlighted locations shown below.

It is important that the setUserId function shown below (_paq.push(['setUserId', 'CustomerID'])) only be called when the customer ID (or hashed version of it) is available. Therefore, you should implement a check to verify that the Customer ID is known before calling the function.

```javascript
<script type="text/javascript">
   var _paq = _paq || [];
   if(CustomerID_Is_Known){
          _paq.push(['setUserId', 'CustomerID']);
    }
 _paq.push(['trackPageView']);
 _paq.push(['enableLinkTracking']);

  (function() {

   var _siteId = your_site_ID;
       var u=(("https:" == document.location.protocol) ? "https" : "http") +
"://your_site_subdomain.optimove.net/";

   _paq.push(['setTrackerUrl', u+'piwik.php']);
   _paq.push(['setSiteId', _siteId]);

   var d=document, g=d.createElement('script'),
       s=d.getElementsByTagName('script')[0]; g.type='text/javascript';
   g.defer=true; g.async=true; g.src=u+'piwik.js'; s.parentNode.insertBefore(g,s);
  })();
</script>
```